



THE SimpleStep<sup>®</sup> GUIDE TO

# CREATING A TASK

**taxcalc<sup>®</sup>**

TaxCalc can create tasks, which can be allocated to both clients and staff.

In addition, you may set reminders to alert you regarding a task and also set them to recur.

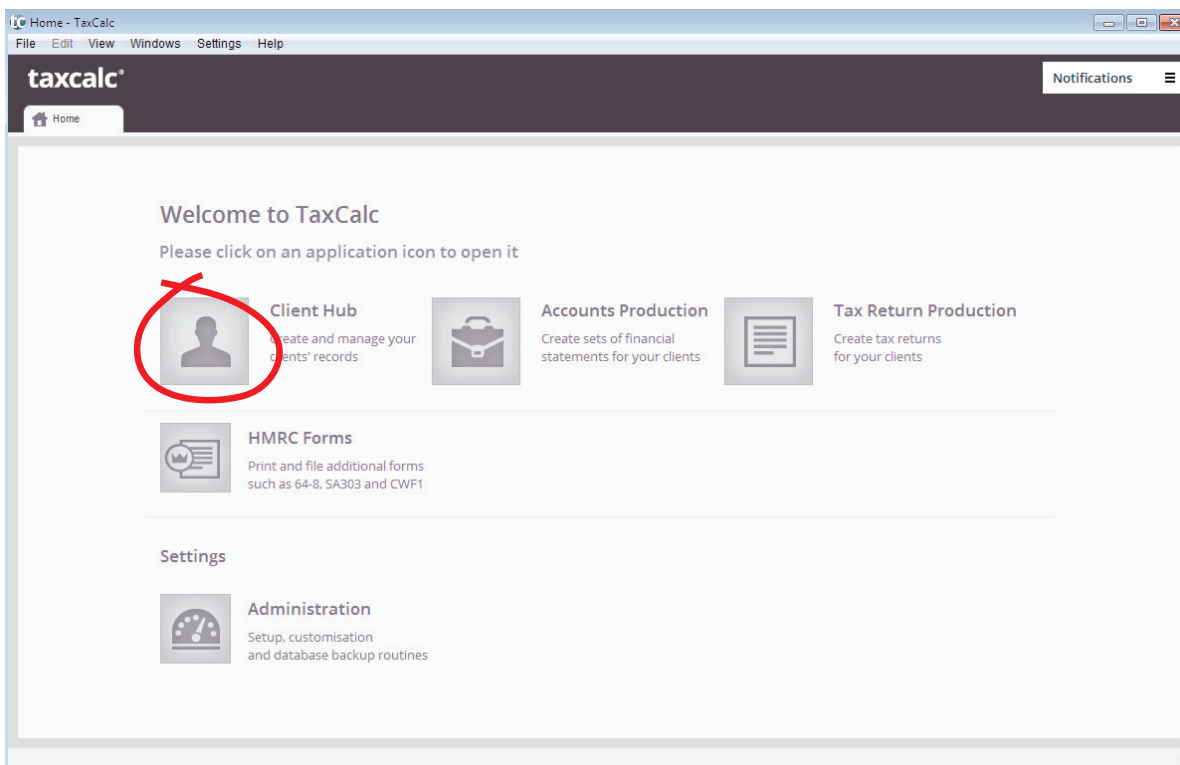
Once set up, tasks can be viewed collectively and filtered according to type, assignee, creation date and a number of other criteria.

# STEP 1

## Open the Client Hub Application

Tasks are managed in the Client Hub application.

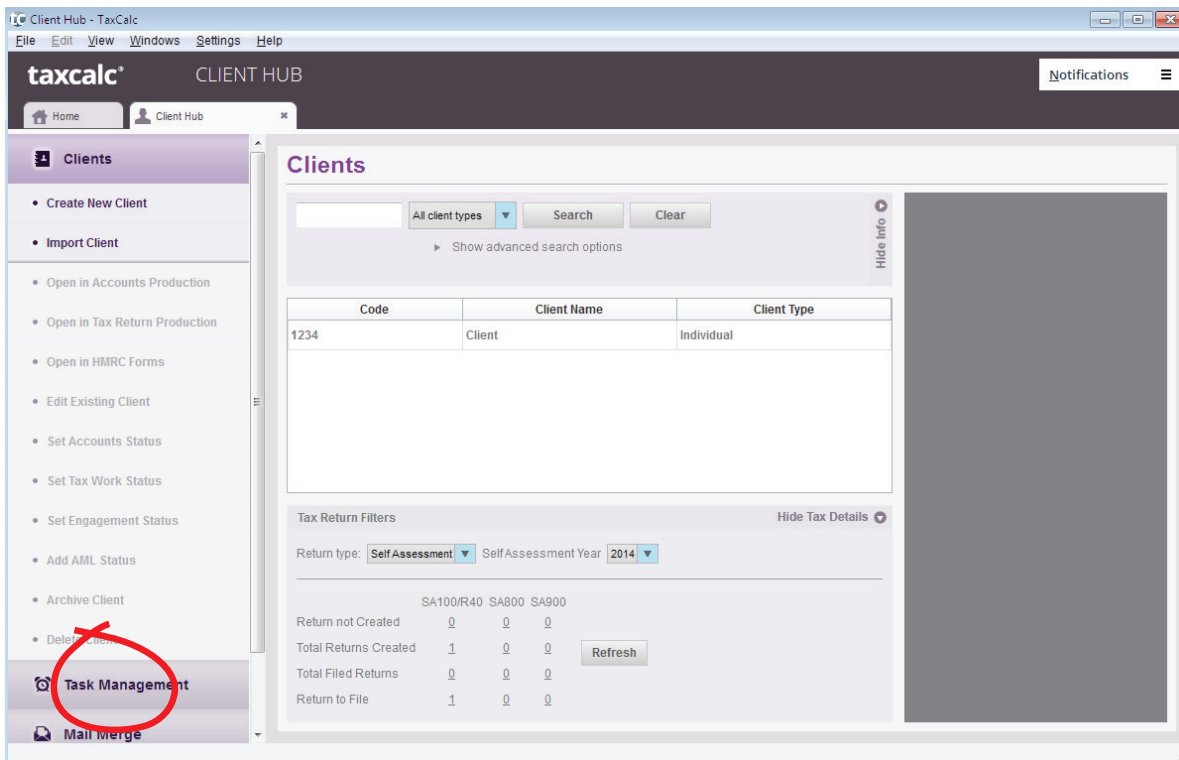
When TaxCalc opens, click on Client Hub to open it.



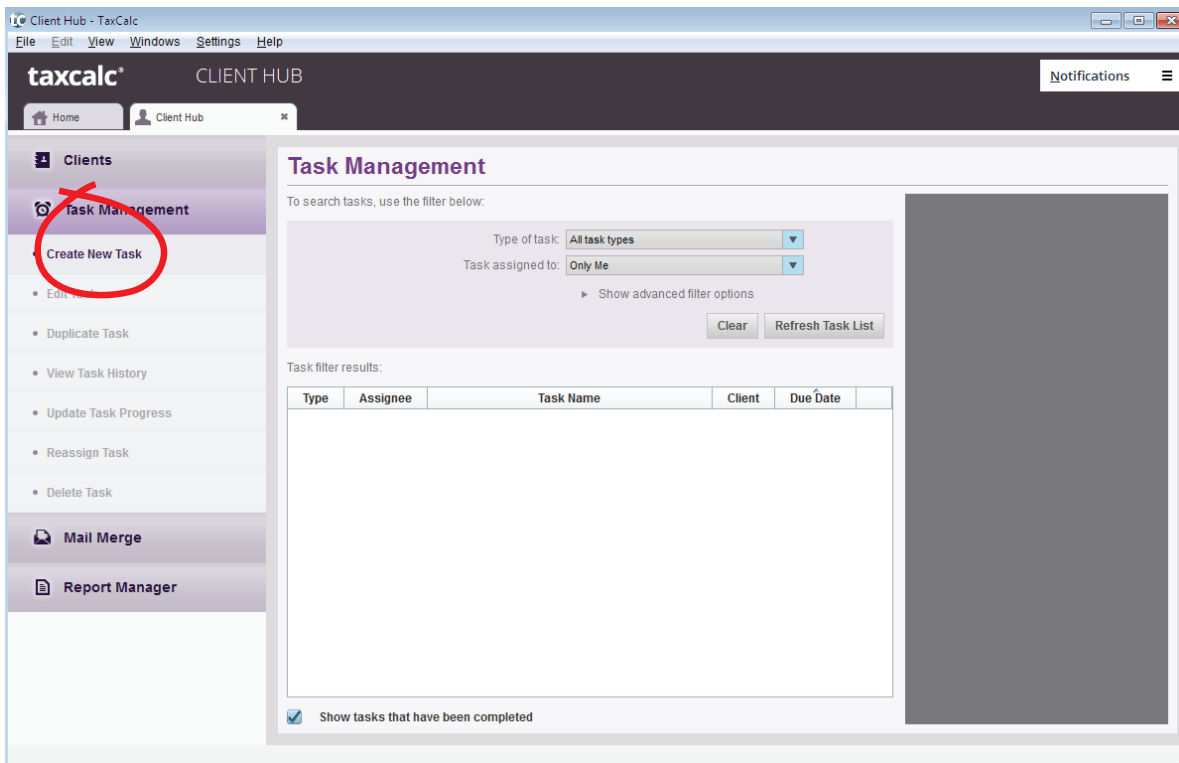
# STEP 2

## Start the Create New Task Process

When Client Hub opens, it will look similar to the screen below. To start the Create New Task process, click on the Task Management option in the left-hand menu.



Then click on the Create New Task option that appears underneath Task Management.

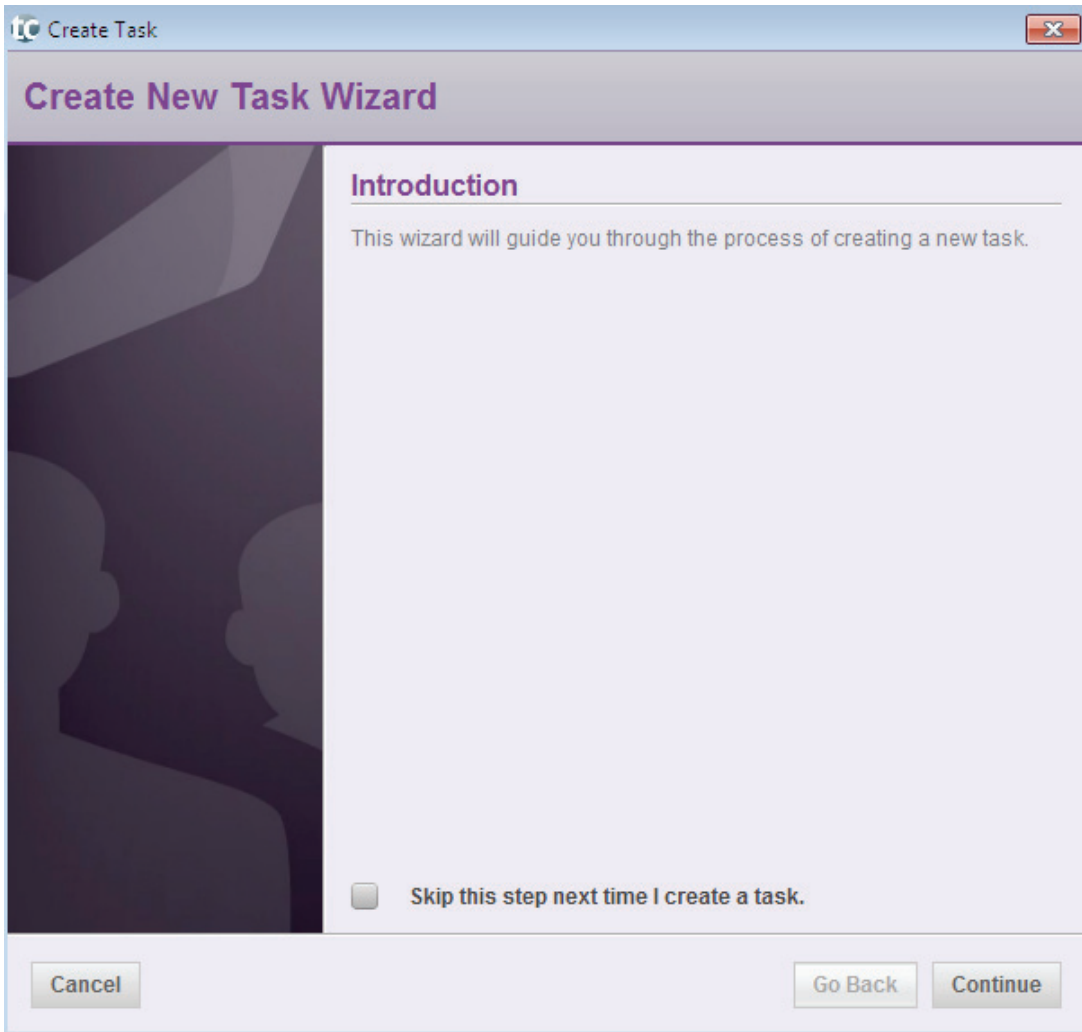


## STEP 3

# The Create New Task Wizard

## Introduction

The Create New Task Wizard will appear.



Throughout TaxCalc, you will find that many processes are driven by Wizards.

At each step, use Continue to advance to the next step and Go Back to return to the previous step.

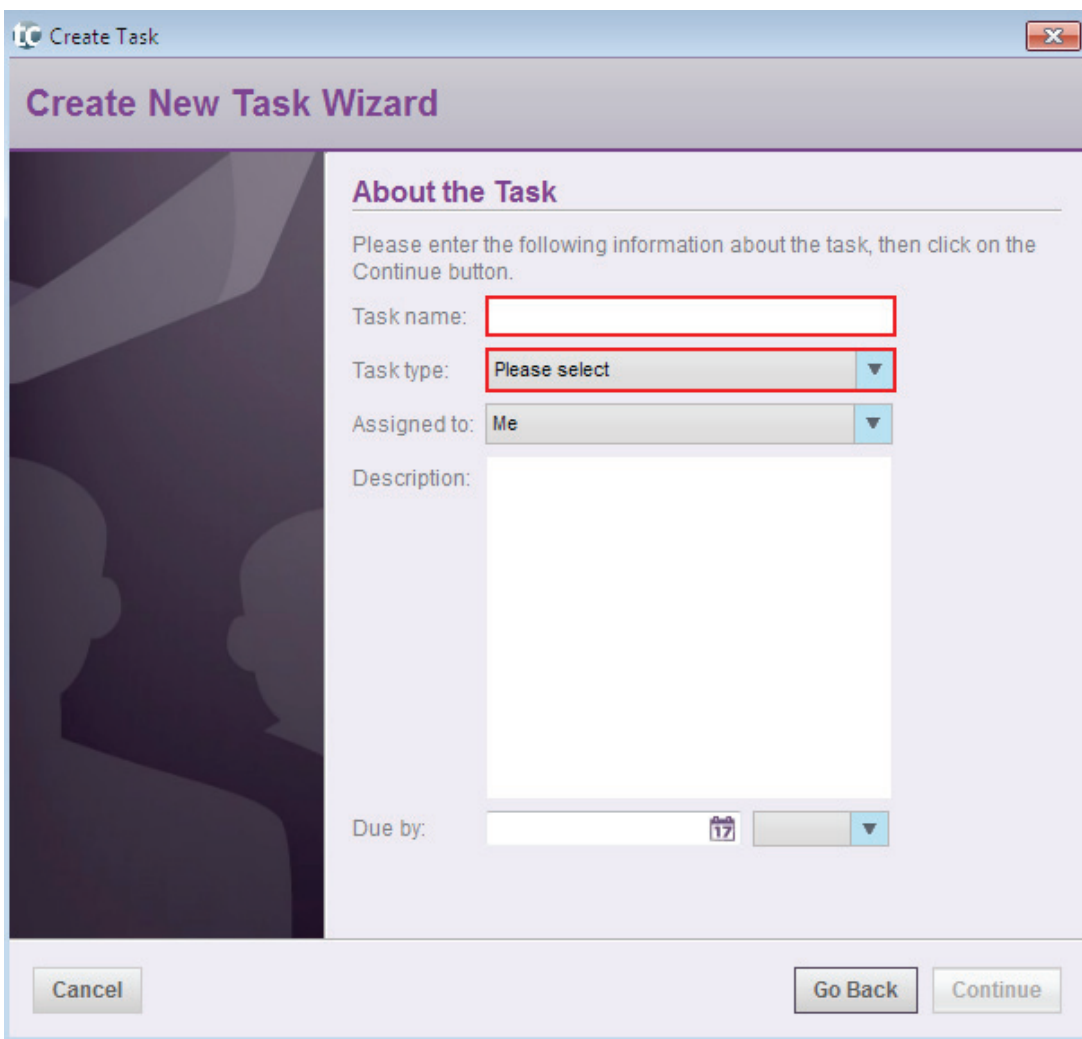
Every time you visit a new Wizard, you will be greeted by an Introduction step. You can tick the checkbox to skip the Introduction the next time you create a task.

Click on Continue to go to the About the Task step.

## About the Task

The About the Task step is where you determine the task's basic attributes, such as name and description.

Don't worry about mistakes – all tasks are editable throughout the process (simply Go Back to return to this step) and even once created (as long as you have permission to do so).



The screenshot shows a window titled "Create Task" with a sub-header "Create New Task Wizard". The main section is titled "About the Task" and contains the following fields:

- Task name: A text input field with a red border.
- Task type: A dropdown menu with "Please select" and a red border.
- Assigned to: A dropdown menu with "Me" and a blue border.
- Description: A large text area.
- Due by: A date picker showing "17" with a blue border.

At the bottom of the window are three buttons: "Cancel", "Go Back", and "Continue".

The fields highlighted in red **must** be completed.

Create Task \*

## Create New Task Wizard

### About the Task

Please enter the following information about the task, then click on the Continue button.

Task name: SH001 Annual conference call

Task type: Other

Assigned to: Steve Jones

Description: This call is regarding their previous year's accounts.

Due by: 29/04/2014 09:00  
Tuesday 29 April 2014 at 09:00

Cancel Go Back Continue

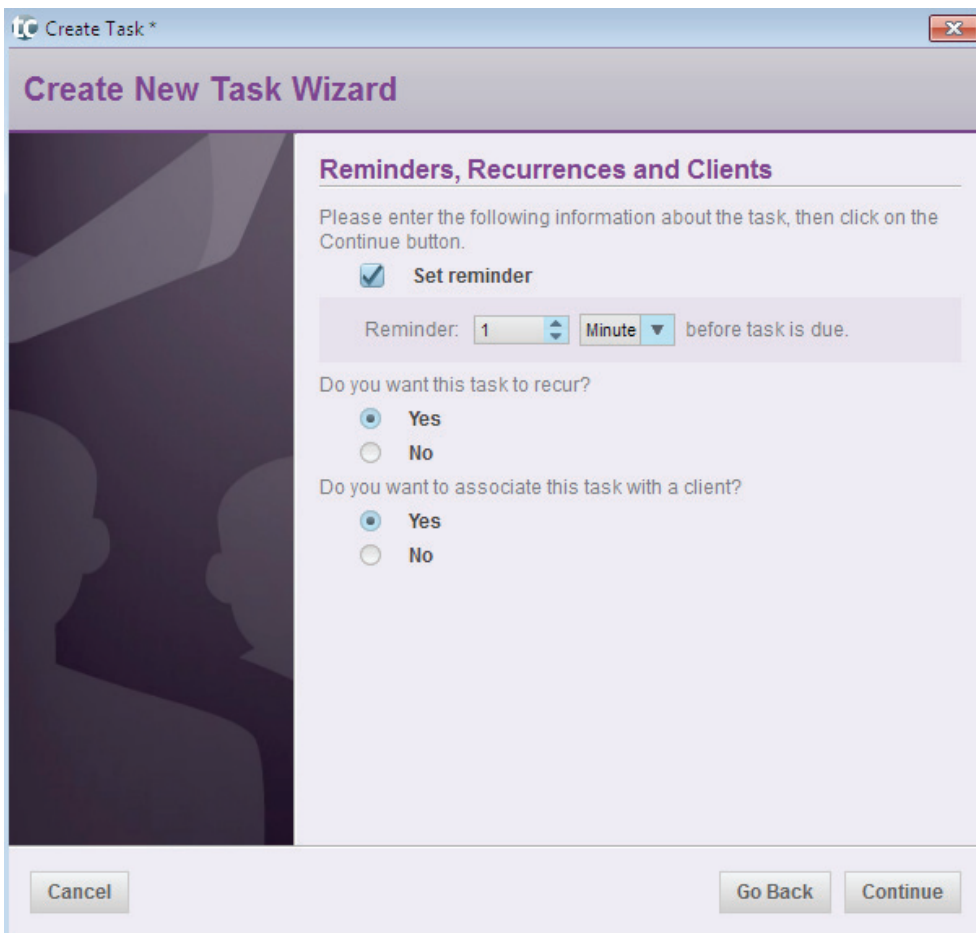
Once you've completed these fields to your satisfaction, click on Continue.



## Reminders, Recurrences and Clients

This step is where you decide if a task requires:

- a reminder (TaxCalc will display the reminder to the assignee at the set time)
- recurrence (which will then be specified in a subsequent screen)
- association with a client (which will then be specified in a subsequent screen)



The screenshot shows a window titled "Create Task\*" with a close button in the top right corner. The main heading is "Create New Task Wizard". Below this, the section is titled "Reminders, Recurrences and Clients". The instructions read: "Please enter the following information about the task, then click on the Continue button." There are three main options, each with a checked radio button:

- Set reminder**

Below this, there is a field for the reminder: "Reminder: 1 Minute before task is due." The "1" is in a spinner box and "Minute" is in a dropdown menu.

Next, there are two questions with radio button options:

- Do you want this task to recur?
  - Yes**
  - No**
- Do you want to associate this task with a client?
  - Yes**
  - No**

At the bottom of the dialog, there are three buttons: "Cancel", "Go Back", and "Continue".

In the example, we will visit all three options: setting a reminder, making the task recur and associating it with a client.

Once you've completed these fields to your satisfaction, click on Continue.

## Choose Client

This step will only appear if you decide to associate the task with a client on the preceding Reminders, Recurrences and Clients screen.

**Create New Task Wizard**

### Choose Client

Find your client in the database, then click on the Continue button.

All client types

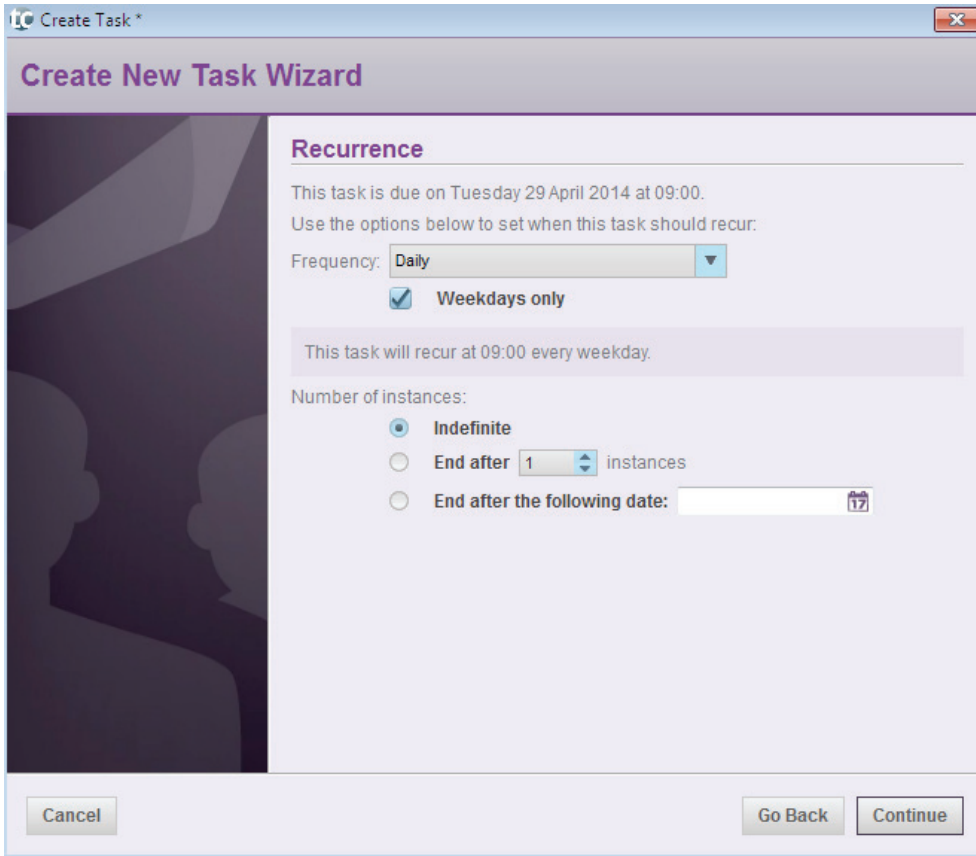
► Show advanced search options

Code	Client Name	Client Type
SM001	Smith, Joe	Individual
12345	Limited Company	Limited Company
9587	Jones, Alan	Individual
BL002	Bloggs, Joe	Individual
REF1	Case, Greg	Individual
PO234	Sherlock & Jones	Partnership
8888	Trust	Trust
DE004	Darwin, James	Individual

Select the relevant client and then click on Continue.

## Recurrence

This step will only appear if you decide to have the task recur on the preceding Reminders, Recurrences and Clients screen.



The screenshot shows a window titled "Create Task \*" with a close button in the top right corner. The main title is "Create New Task Wizard". The current step is "Recurrence".

The text reads: "This task is due on Tuesday 29 April 2014 at 09:00. Use the options below to set when this task should recur:"

Frequency:  (dropdown arrow)

Weekdays only

This task will recur at 09:00 every weekday.

Number of instances:

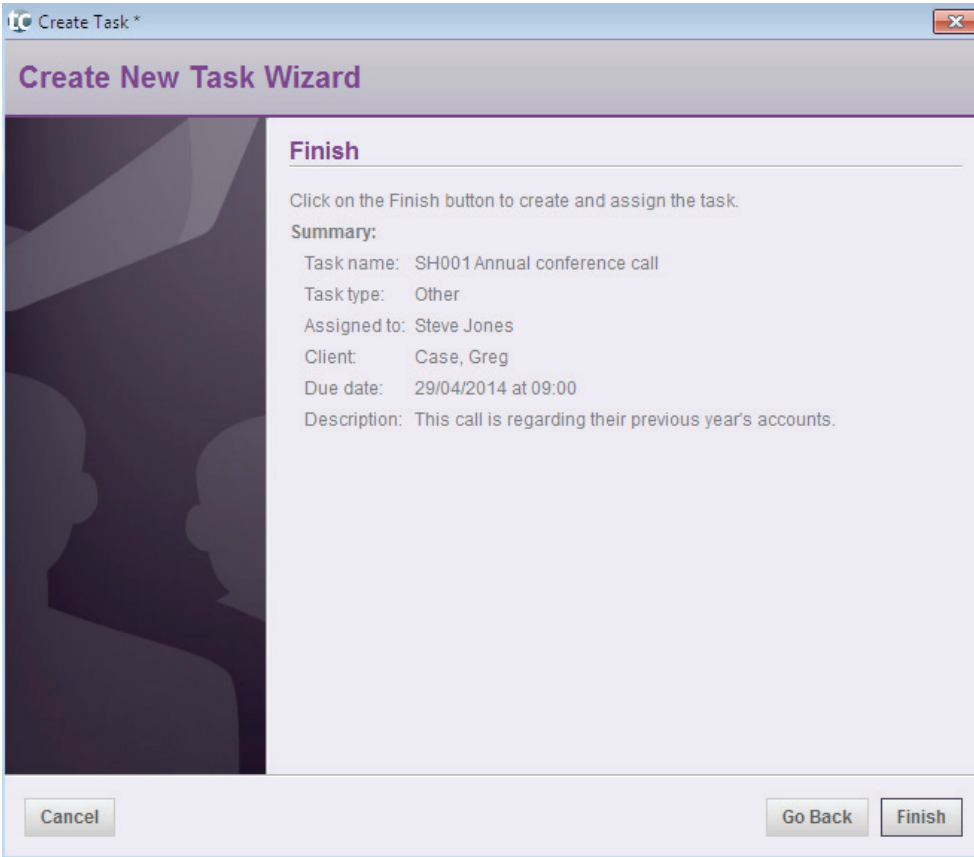
- Indefinite
- End after  instances
- End after the following date:  (calendar icon)

Buttons at the bottom: Cancel, Go Back, Continue.

Decide how often and for how long the task should recur and then click on Continue.

## Finish

This step summarises all the attributes of the task that you have determined.



The screenshot shows a window titled "Create Task \*". Inside, the "Create New Task Wizard" is displayed. The current step is "Finish". The text reads: "Click on the Finish button to create and assign the task." Below this is a "Summary:" section with the following details:

- Task name: SH001 Annual conference call
- Task type: Other
- Assigned to: Steve Jones
- Client: Case, Greg
- Due date: 29/04/2014 at 09:00
- Description: This call is regarding their previous year's accounts.

At the bottom of the wizard, there are three buttons: "Cancel", "Go Back", and "Finish".

If anything is incorrect, you can click Go Back to revisit the relevant step.

Click on Finish to end the Create Task Wizard and create your task.

# STEP 4

## The Task Management screen

The screenshot shows the 'Task Management' interface. At the top, there are filter options: 'Type of task' set to 'All task types' and 'Task assigned to' set to 'Everybody'. Below these are 'Clear' and 'Refresh Task List' buttons. The main area displays a table of tasks with columns for Type, Assignee, Task Name, Client, Due Date, and Progress. A red circle highlights the task 'Administration' assigned to 'Administrator' with the name 'SH001 Annual conference call'. The sidebar on the right shows details for a 'Tax Return' task, including its name, client, creator, and progress status.

Type	Assignee	Task Name	Client	Due Date	Progress
Tax Return	Administrator	SM001 Client Questionnaire...	Sherlock & Jones	04/02/2014 09:00	100%
Administration	Administrator	SH001 Annual conference call	Greg Case	02/03/2014 09:00	0%
Other	Steve Jones			29/04/2014 09:00	0%

The task will now appear in the list of tasks on the Task Management screen.

If it does not appear, you can display all tasks by:

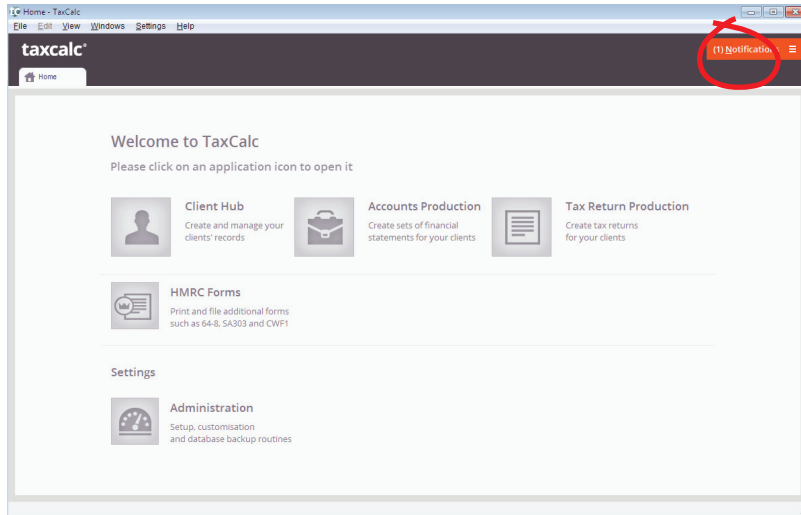
- 1) Setting the 'Type of task filter' to: All task types
- 2) Setting the Task assigned to filter to: Everybody
- 3) Clicking on the Refresh Task List button.

Your task will now appear within the full list.

If it still does not appear, you likely do not have permission to see everybody's tasks in your assigned security profile.

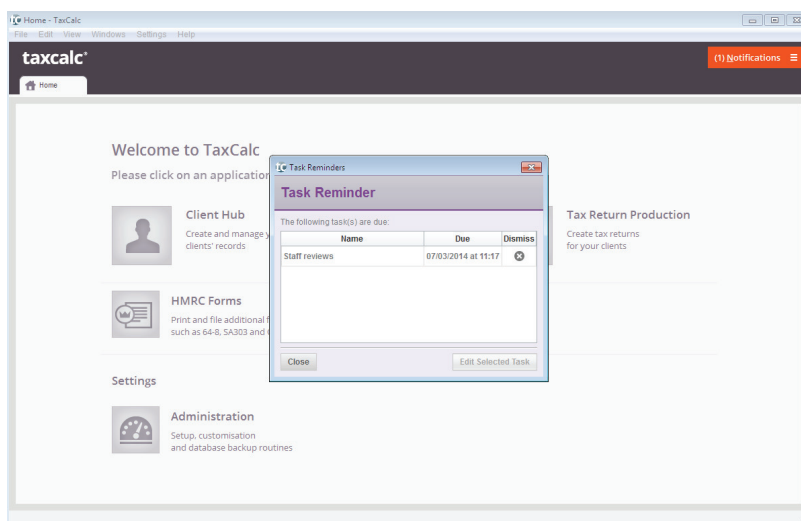
## Reminder Notifications

If a task is set with a reminder, the Notification menu will turn red at the set time and will only be displayed to the assignee.



The number displayed in the menu relates to the number of tasks assigned to the user logged in, that have reached their reminder date and time.

If you click on the Notification menu, it will bring up the list of relevant tasks – in other words, all tasks that have reached their set reminder time. Click on Show details to display each task in turn.



Once you have selected a task, you can edit that task (for example, to re-set its reminder time) by clicking on Edit Selected Task.

Should you click on the Dismiss icon for a task, this will remove the reminder entirely (the task will remain however).

Help for all TaxCalc products can be found in our Knowledge Base at [www.taxcalc.com/support](http://www.taxcalc.com/support)

If you require further assistance please contact our Support Team:

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