

simplifi<sup>®</sup>



# Simplifi Contact

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Station: Tasks

## OVERVIEW

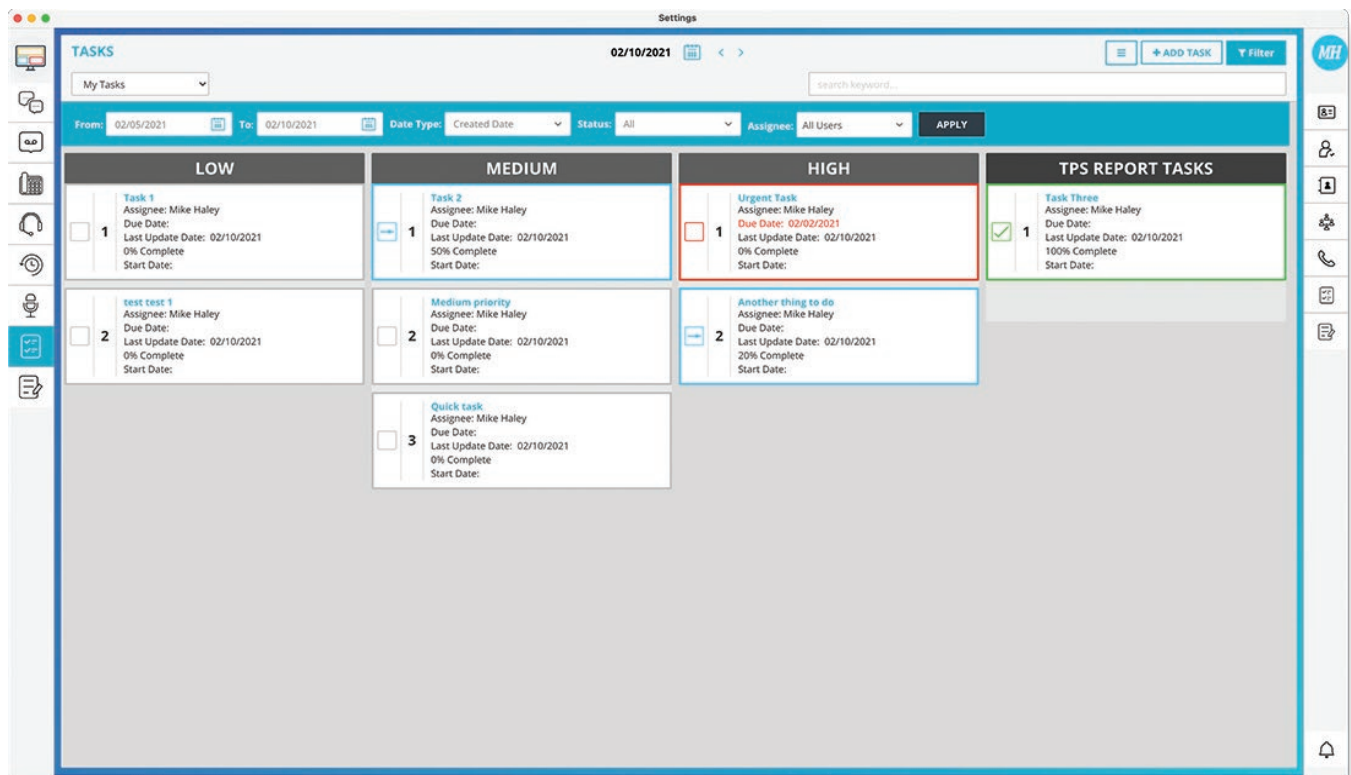
Station Tasks module is the first productivity tool created for the Station application. The tasks module allows a user to manage their personal and organizational tasks within the Station application. Features include:

- Personal and Organizational Task Management
- Task Delegation
- Task Sharing
- Task Activity Log
- Task Notifications
- Link UC Objects to Tasks for Quick Referencing and Centralization
- Tasks Mobile App

## TASK MANAGEMENT

### PLANNING PAGE

There is a task icon located on both the left and right sides of the application. Clicking the task icon on the left-hand side (LHS) will display a full page of your tasks that we'll refer to as the Planning Page. Here, you can click-and-drag your tasks around to reorder and re-prioritize them.



In the header, there is a drop down to determine what types of tasks to display. Changing the dropdown will change which tasks are shown on the page, and how they are shown. Tasks that you have delegated to other users and tasks that are shared with you are shown in a list view since you can only control the priority and level of your own tasks.

Changing the date into the past will display tasks that you've completed, canceled, planned forward, and last updated on that date. You cannot reorder tasks in the past because that's historic information. Changing the date into the future will display tasks that you've planned to start using the Start At date and tasks that you've planned forward to that specific date.

Today's date will show you all tasks that you've started, but have not completed or canceled yet, and any tasks that do not have a start at date.

Clicking on the title of any task will take you to the Edit Task page.

Use the ADD TASK button to add a new task.

Use the Filter button to show advanced filter options.

Use the Search box to search for tasks based on title and tags.

The screenshot displays the 'TASKS' section of the Simplifi interface. At the top, there's a header with a date selector set to '02/10/2021', a search bar containing 'task', and buttons for '+ ADD TASK' and 'Filter'. Below the header, a filter bar allows users to select a date range (From: 02/05/2021, To: 02/10/2021), a date type (Created Date), status (All), and assignee (All Users), with an 'APPLY' button. The main area features a table with columns: Status, Title, Assignee, Start Date, and Last Updated. The table lists five tasks: 'Task 1' (To Do), 'Task 2' (In Progress), 'Quick task' (To Do), 'Urgent Task' (To Do), and 'Task Three' (Completed). All tasks are assigned to 'Mike Haley' and have a start date of 'N/A' and a last updated date of '02/10/2021'. A sidebar on the left contains navigation icons, and a right sidebar shows user profile information and additional settings.

Status	Title	Assignee	Start Date	Last Updated
To Do	Task 1	Mike Haley	N/A	02/10/2021
In Progress	Task 2	Mike Haley	N/A	02/10/2021
To Do	Quick task	Mike Haley	N/A	02/10/2021
To Do	Urgent Task	Mike Haley	N/A	02/10/2021
Completed	Task Three	Mike Haley	N/A	02/10/2021

## TASK LIST

Clicking the task icon on the right-hand side (RHS) will display your task list from the right-side pullout which allows you to see your tasks regardless of which app you have open on the LHS.

Tasks are arranged based on priority and level. When viewing ALL TASKS, any tasks that you've delegated and tasks that have been shared with you will display in their own sections at the bottom of your list. The user can click the ALL TASKS text in the header and select a different type of tasks to display.

Clicking on the title of any task will take you to the Edit Task page.

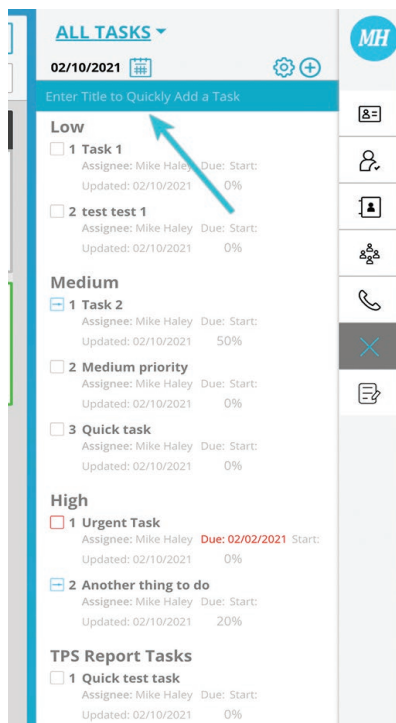
The calendar icon in the header of the RHS behaves the same as the Planning Page and controls the ability to click-and-drag tasks on the RHS. The calendar dates are independent from each other between the two pages.

Clicking the plus icon will display the Add Task page.

Clicking the gear icon will flip the task list over and show the display settings. The user can choose what additional information to show in the task list. These settings are applied to both the Planning Page and the Task List.

## ADDING A TASK

There are 2 ways to add a task. The first method we refer to as a 'quick add' which is located on the right-hand side (RHS) header under the header. A user can click on the blue bar, type a task title, and the task will be created in the "To-Do" status and appear in the Unclassified header.



The second method to add a task is to use the plus icon in the header of the RHS or use the ADD TASK button in the header of the Planning Page. Both will open the full page to add a task which allows the user to configure additional options.

The screenshot shows the 'ADD TASK' form with the following fields and sections:

- Title :** Text input field.
- Assignee :** Text input field with 'Mike Haley' selected.
- Share With :** Text input field with 'Select...' placeholder.
- Tags :** Text input field with 'Add new tag' button.
- Priority :** Text input field with 'TPS Report Task' selected.
- Level :** Text input field.
- Status :** Dropdown menu with 'To Do' selected.
- Complete :** Text input field with '0' and a percentage sign.
- Start Date :** Text input field with a calendar icon.
- Due Date :** Text input field with a calendar icon.
- Description :** Large text area.
- Linked To :** Section with a 'LINK TO ▲' button and a large grey placeholder area.
- Attachments :** Section with an 'ADD ATTACHMENT' button and a large grey placeholder area.

**Title** - Title of the task

**Assignee** - Who this task is assigned to. By default, this will be pre-populated with your name. If you change the assignee, Priority, Level, and Start Date will disappear

**Share With** - Names of other users in your account that you would like to share this task with. Tasks that are shared with other users can only be viewed and not edited (read-only)

**Tags** - Any tag words you wish you associate with this task. Already-created tags will show up as you type. To add new ones, just type the word and hit the enter key. Tags are specific to each user.

**Priority and Level** - Set the priority and level of the task. By default, the priority will be unclassified with no level, which means it will go to the bottom of your task list

**Status** - The status of the task. By default, this will be To Do

**Complete** - The percentage completion of the task. By default, this is blank

**Due Date** - The date you want to complete this task by, or, if delegating the task, this is the date you want it completed. By default, this is blank

**Start Date** - The date you plan to start this task. By default, this is blank

**Description** - Any additional information about the task that you did not want in the title. By default, this is blank

**Link To** - Here you can link assets to the task. An asset is another piece of data from the Station application. All users who have been shared this task can view the task assets. If you have delegated the task to another user, the assignee can also view the assets.

#### Assets include

- Call History
- Chat History
- Call Recordings
- Voicemails
- Attachments - Here you can upload other files to the task.

#### EDITING A TASK

**EDIT TASK**

Cancel Task [Notification Icon] [Task History Icon] [UPDATE] [X]

1 2 3 4

**Title :** Urgent Task **Status:** To Do

**Assignee :** Mike Haley **Complete:** 90 %

**Share With :** Jon Whyte **Start Date:** Start Date

**Tags:** projects **Due Date:** 02/02/2021

**Priority:** High **Level:** 1

**Created:** 02/10/2021 04:09 PM **Updated:** 02/10/2021 04:16 PM

**Description :**  
Packaging project for client.

**Comment :**  
Just add this to the project. Thanks 5

**Linked To:** [LINK TO] **Attachments:** [ADD ATTACHMENT]

**Contacts :**  
John Doe, CEO  
Widgets Corp  
2/10/2021 11:45 AM

**Attachments:**  
BOX.png  
PNG 1MB

[ADD COMMENT]

The Edit Task page is very similar to the Add Task page. There are some unique fields, dialog boxes, and header icons on the Edit Task page.

1. Notification icon - When clicked, this will navigate you to the Task Notification page that will allow you to set notifications specific to this task
2. Task history icon - When clicked, this will navigate you to the Task History page that will display all the activity of the task
3. UPDATE button - once you've edited the task, click this button to update it
4. X icon - when clicked, this will close the task
5. Note - This allows you to add a note to the task. The note will appear under the Linked To section as an asset

All assets and attachments are visible.

### SHARING TASKS

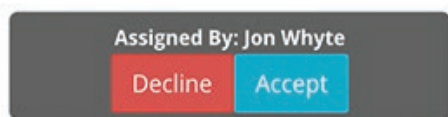
When a task has been shared with you, it will appear to you in read-only mode. Meaning, you cannot edit anything about this task. The sharer has given you visibility to all the assets, notes, and history on the task.



When viewing a shared task, you'll see a unique button in the header of the task that allows you to unfollow the task. If you do not wish to have this task shared with you, clicking the unfollow button will remove you from the list of shared users and close the task.

### DELEGATED TASKS

If you have delegated the task to another user, you will see a delegation Acceptance Status box which indicates whether the user accepted, declined, or has not yet taken any action on the task.



If the task has been delegated to you, you will see 2 buttons to accept or decline the task delegation. If you've already accepted the task and it has a due date, then you will also see a button titled 'Request Extension'. To request a due date extension, click the button, select a new date you wish to complete the task by, and click submit. The task creator will get notified of the request and can respond with an acceptance or decline of your request.

### CONTACT TAGGING

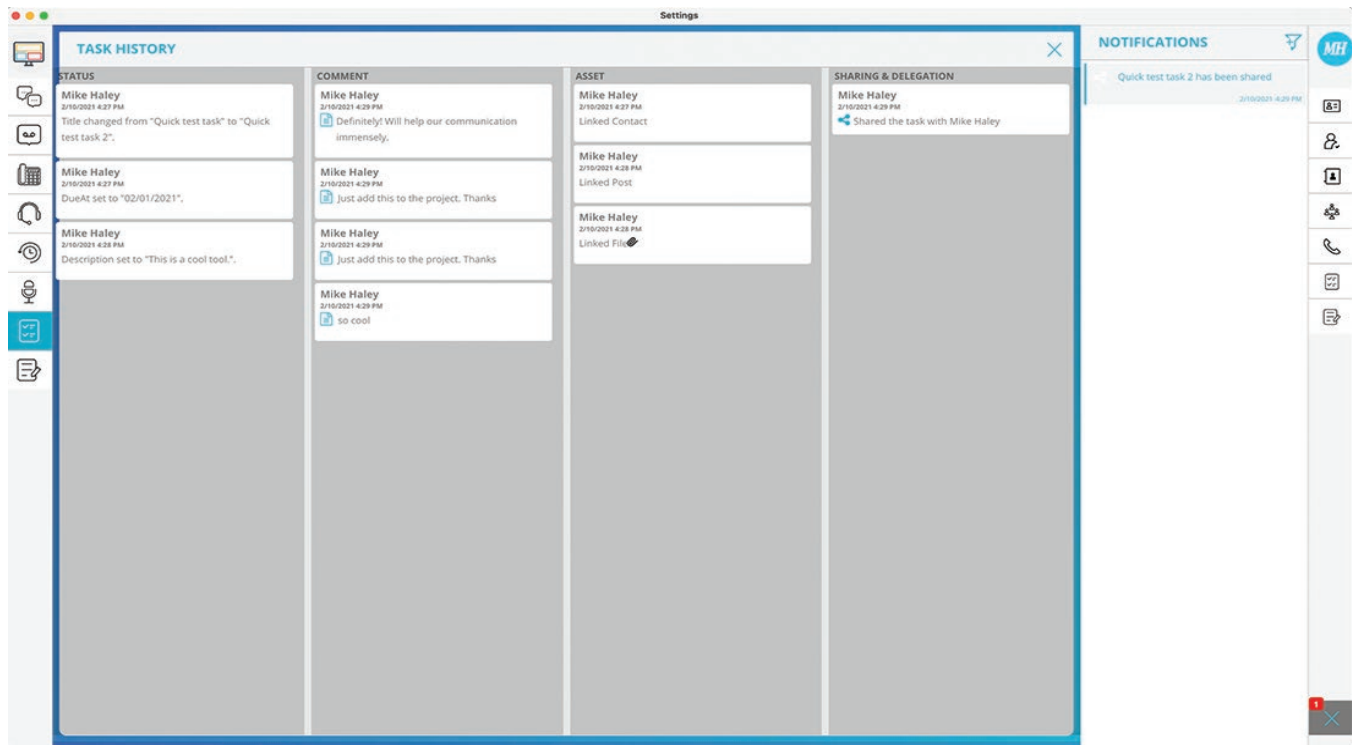
If you have the Station Contacts Module and you have contact integration with Office365 or G-Suite, you can tag your contacts in your tasks! You can tag the contact in the task title or the notes sections. To tag a contact, type the 'at' symbol (@) then begin typing the contact's name. You can tag multiple contacts on the same task.

When a contact is tagged, they will have a new entry in their communication history indicating they were tagging in this task with a date stamp. This way you can easily track tasks you're doing for your contacts!



## TASK HISTORY

The Task History page allows a user to monitor progress on a task and see all the actions that have been taken on a task throughout its life cycle. This historic data can be used for tracking productivity and accountability. To view the full note/chat/asset/attachment information the user can just click on one of the entries.



## TASK CONFIGURATION OPTIONS

### TASK SETTINGS

**Task Colors** – allows the user to define the icon and outline color of their tasks based on their status and classification. Task classifications override the status. For example, if you have a task in progress, but it's past due, then it's classified as past due and will show in the past due color, not the in-progress color. This applies to past due and delegated tasks.

**Show in List** – allows the user to define what additional information they want to show in their task list on both the LHS and RHS lists. These settings can also be accessed from the settings icon in the header of the RHS task list.

**Priority** – These options are only shown to account admins. They allow the account admin to define the naming convention for the 4 priority classifications. By default, these are A, B, C, and Unclassified.



**TASK SETTINGS**

**Task Colors**

Cancelled Completed Delegated In Progress Past Due Planned Forward

**Priority**

A Low

B Medium

C High

D TPS Report Tasks

**Show in List:**

☒ Assignee

☒ Due Date

☒ Last Update Date

☒ Percentage Complete

☒ Start Date

☐ Word Wrap

**SUBMIT**

## TASK NOTIFICATIONS

Located on the Desktop Notifications page, there is a new section for Task Notifications. These settings allow a user to globally define what notifications they wish to receive about task activities.

Don't forget, a user can override these global settings by defining specific notification options for a single task (see Edit Task section above). Task notifications are partitioned into 3 sections based on the type of task.

**Delegated Tasks** – These are notification options that apply to tasks that you have delegated to another user.

**User's Own Tasks** – These are notification options that apply to tasks where you are the assignee. This includes both tasks you've created for yourself and tasks that other users have delegated to you.

**Tasks Shared With Me** – These are notification options that apply to tasks that other users have shared with you.

**DESKTOP NOTIFICATIONS**

**Chat Notifications**

Send Desktop Notifications:

☐ For All Activity

☒ Only Mentions and Direct Messages

☐ Never

Sound:

☒ On

☐ Off

Notification Duration:

☒ 3 Seconds

☐ 5 Seconds

☐ 10 Seconds

☐ Unlimited

**Task Notifications**

**Delegated Tasks**

☒ Enable Task Updated

☒ Enable Status Changes

☒ Enable Close to Due Date

0 Days Before Due Date

☒ Enable Past Due

0 Days After Due Date

☒ Enable Request Extension

☒ Enable Delegation Response

☒ Enable Comments

**User's Own Tasks**

☒ Enable Close to Due Date

0 Days Before Due Date

☒ Enable Past Due

0 Days After Due Date

☒ Enable Task Delegated to You

☒ Enable Task Rescinded

☒ Enable Extension Response

**Tasks Shared With Me**

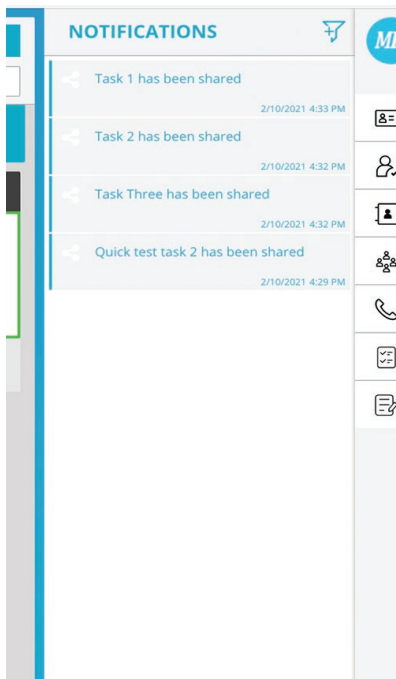
☒ Enable Task Shared

☒ Enable Comments

☒ Enable Task Updated

## NOTIFICATIONS

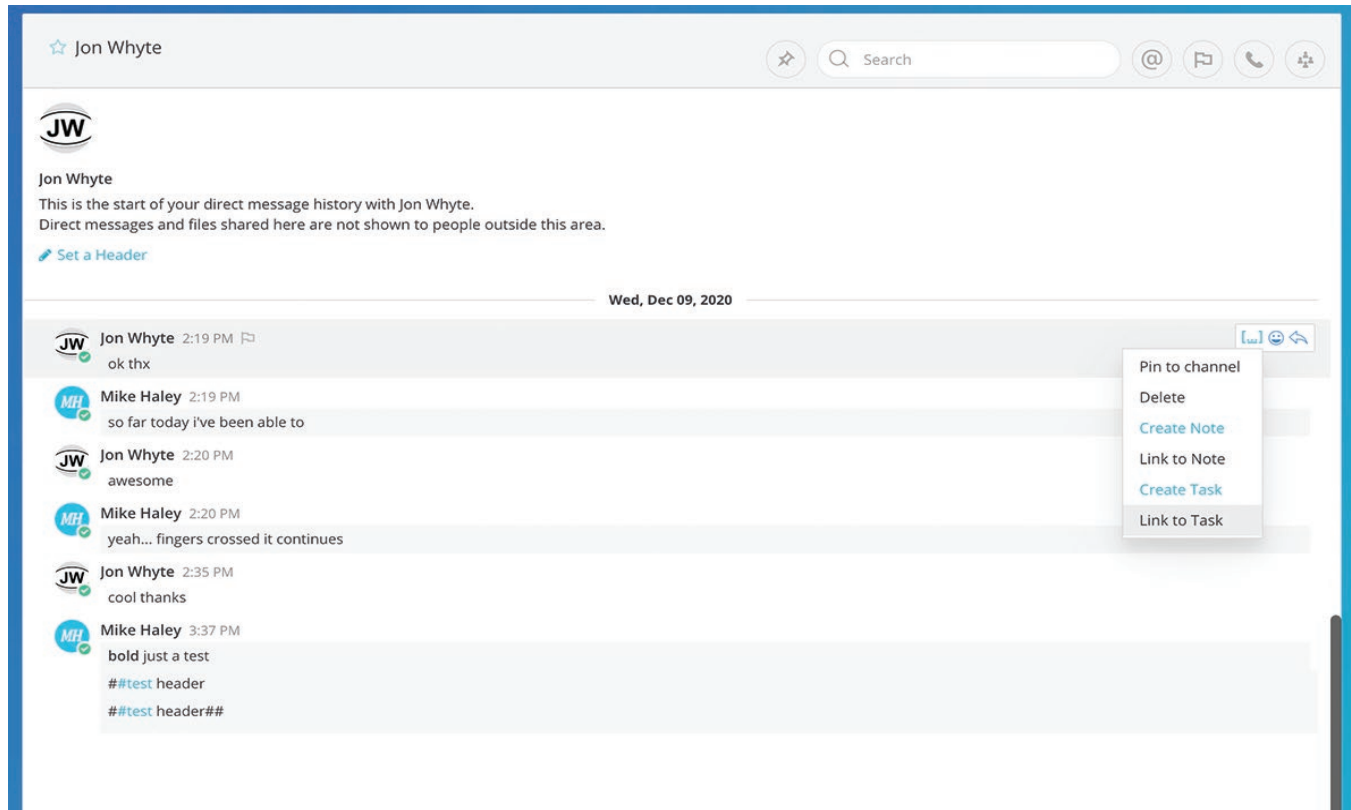
There is a new icon located in the bottom right corner of the Station application. This is where you'll see all your task notifications. Notifications will be sent to you based on your settings. Each notification will indicate what happened on the task, and the text will be a link to the edit page of the task. Clicking anywhere on the notification will mark it as 'read'. You can also click the X icon in the top right corner to delete the notification.



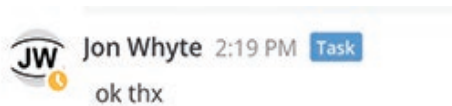
In the header there is a filter icon. This allows the user to select a date range for notifications they wish to see and determine if they want to view All, Unread, or Read notifications.

## CHAT PAGE INTEGRATION

With the introduction of Station Tasks, a user can now quickly and easily create a task and/or link a chat message to a task right from the chat app! A user just needs to mouse-over a chat message, click the 3-dot icon and select the appropriate action they wish to perform.



Once a chat message is linked to a task, when viewing the chat, the user can see a 'task' icon and click it to edit the task.



### CALL HISTORY, CALL RECORDINGS, AND VOICEMAIL INTEGRATION

Like the chat page integration, you have the same functionalities available to you on the call history, call recordings, and voicemail pages. Use the 3-dot menu to create a task and/or link to a task. If the row has already been linked to a task, the task icon will show up on that row and you can click it to navigate to the edit task page.






#### Call History

02/10/2021	2:50 PM	INBOUND	HALEY MICHAEL 	(269) 352 - 2549	0 : 36	  
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#### Call Recording

 	8:20 AM February 10, 2021 5:33 PM	MIKE HALEY	OUTBOUND		3101	2 : 39	Play File   
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#### Voicemail

February 10, 2021 12:13 PM	HALEY MICHAEL  (269) 352 - 2549	   0:00/0:08	  
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