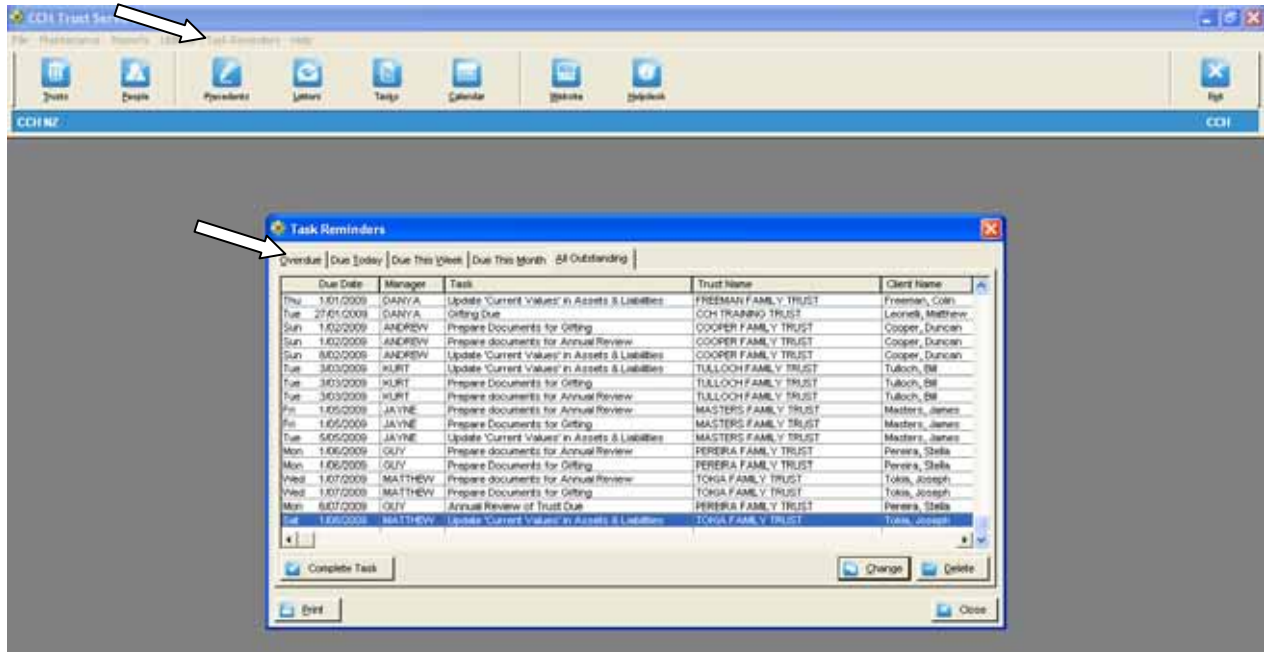


SESSION 4.5

LEVEL 1

VIEWING TASKS

Select Task Reminders from the top toolbar



There are 5 views to choose from by selecting the appropriate tab at the top

You can Complete a task from this screen, highlight task and select Complete

You can Edit a task from this screen, highlight task and select Change


You can Delete a task from this screen, highlight task and select Delete

Task Report

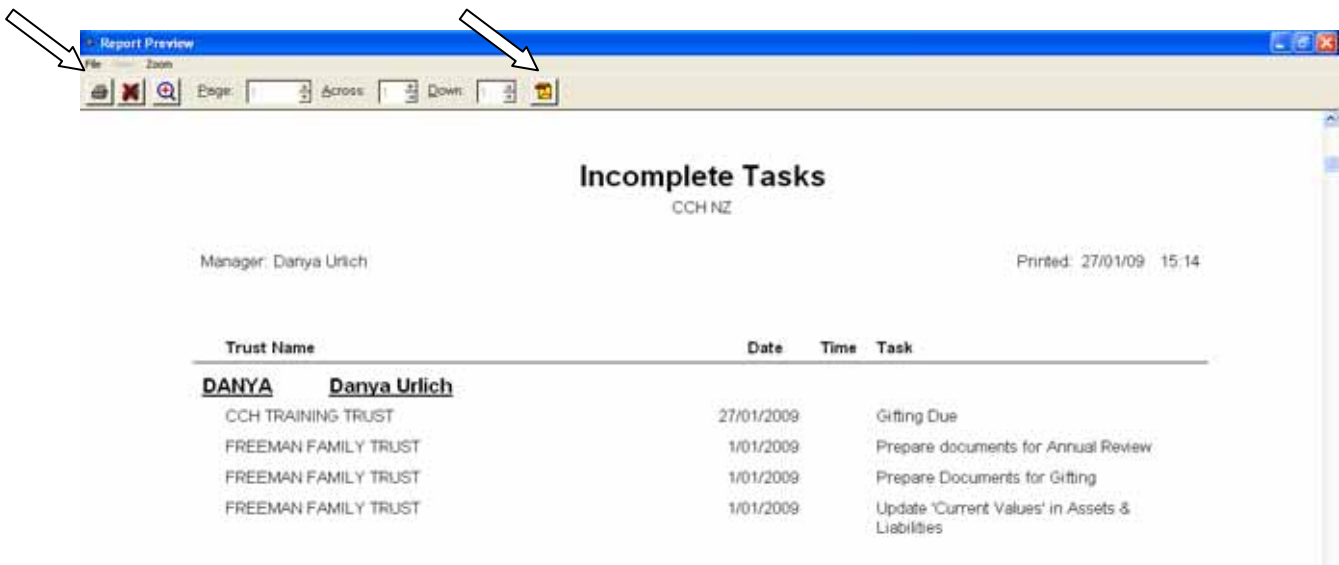
Select Reports > Select Tasks > Incomplete Tasks



Select the criteria for your report. You can choose to report based on Due Date, Manager, Trust Status, Trust Category, Trust Group, Trust Name or Keywords or a combination of any of the above.



This report can be exported into Excel by checking the Create MS Excel File box
 Select Print to print to screen

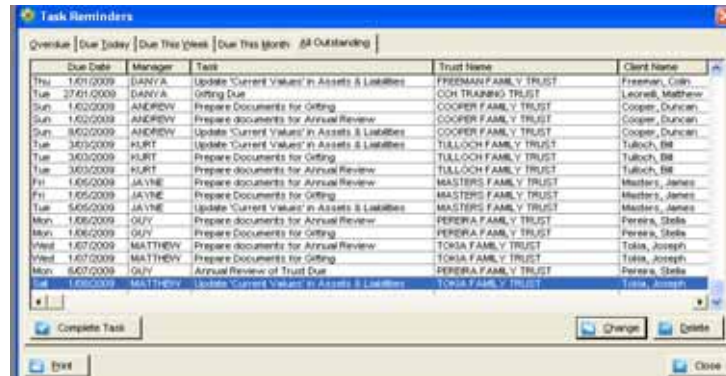


Trust Name	Date	Time	Task
DANYA <u>Danya Ulrich</u>			
CCH TRAINING TRUST	27/01/2009		Gifting Due
FREEMAN FAMILY TRUST	1/01/2009		Prepare documents for Annual Review
FREEMAN FAMILY TRUST	1/01/2009		Prepare Documents for Gifting
FREEMAN FAMILY TRUST	1/01/2009		Update 'Current Values' in Assets & Liabilities

This report can be printed or saved to PDF

Task Reminders at Start of Day

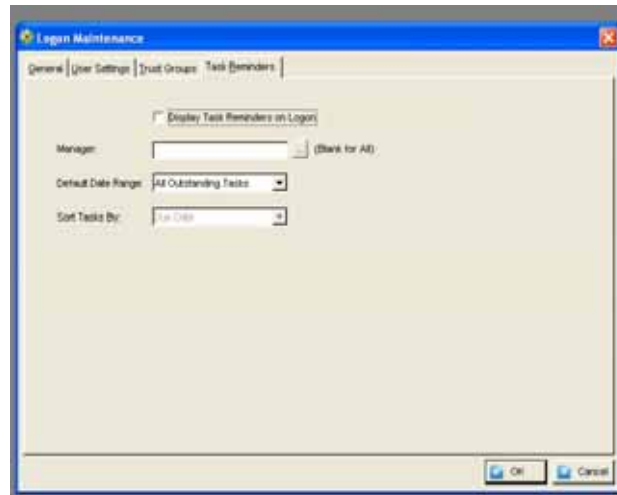
You can set the Task Reminders screen to appear automatically at the start of day or each time you log into the Trust Service



Select Maintenance > Users > Logon Names



Select you User Name to open the Logon Maintenance Screen.



Check the box Display Task Reminders on Logon.

You may wish to view Tasks for 1 Manager only

You may wish to change the Default Date Range

Viewing Tasks for all Trusts/Single Trust

Select Task Reminder or Calendar from the top toolbars to view for all Trusts



Select Task or Calendar from the Trust toolbar to view for that Trust only

