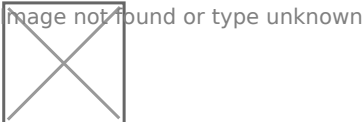


Automatically create tasks related to a Job type

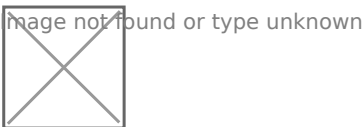
RakataCRM has the ability to dynamically create tasks on jobs based on the Job Type. For example you might want to create a list of task associated with a Domestic jobs and assign different tasks to different employees. If you were needing to do this each time a Job was created this would take the administrator huge amounts of time. Now this can be done in seconds.

Create Tasks associated with a Job Type

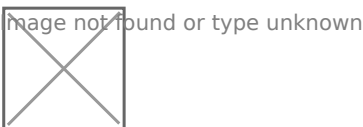
1. Click "Job Lists"



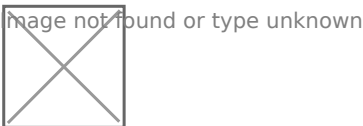
2. Click "Create Job Lists"



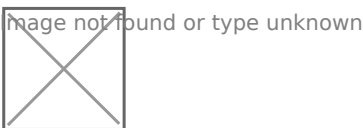
3. Select the Job Type that the tasks will be created against when a Job is created



4. Add the name of the Job List e.g. Domestic Job List Tasks



5. Add a description if required



6. Save the Job List

image not found or type unknown



7. Add specifics tasks for this Job List

image not found or type unknown



Tip! There is no limit to the amount of tasks to you can assign to a job

8. Click "Create"

image not found or type unknown



9. Add the specific task name

image not found or type unknown



10. Select who you want to assign the task to

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11. Select the Priority

image not found or type unknown



12. Add details of the task if necessary

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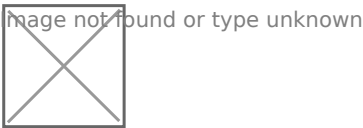


13. Click Save

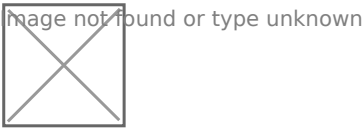
image not found or type unknown



14. Now when creating a job



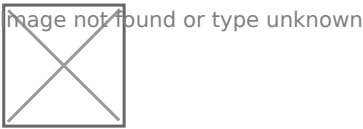
15. Click "Create Jobs"



16. When Saving the Job if the Job Type drop-down (e.g. Domestic) matches the Job Type in the Job List the tasks will be created when the Job is created.



17. After the Job is created clicks the Tasks tab



18. The Tasks will appear here.

JOB LIST TEST ☆

Basic

Location/Timing

Worksheets

Attachments

Appointments

Financials

POs

P & L

T/S

Expenses

GANNT

Contactor Quote

Tasks

ACTIONS

Show 100 entries

Search:

Subject	Status	Start Date	Due Date	Priority	Description	Assigned to	Date Created	Date Modified
Dwight Test	Not Started			Medium	Come on lets go	Dwight Britten	2024-06-12 05:57:11	2024-06-12 05:57:11
Phone surveyor	Not Started			Medium	Phone Surveyor	Adam Griffiths	2024-06-12 05:57:11	2024-06-12 05:57:11
This is a test	Not Started			Medium		Adam Griffiths	2024-06-12 05:57:11	2024-06-12 05:57:11

Showing 1 to 3 of 3 entries

Previous

1

Next

TIP! Employees can see their open tasks on their home page login via the Dashlet in "My Open Tasks"