## **fibre**CRM

HEART OF THE PRACTICE

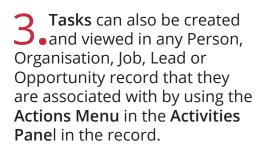
Visit support.fibrecrm.com for more info or contact your CRM Manager

## Assigning a Task to a User in CRM

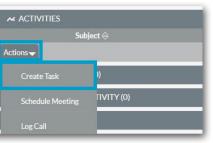
Tasks are stored in their own module in CRM for reporting
purposes, you can create a task by first navigating to the
All tab on the Navigation Menu and selecting Tasks.

CONTACTS C	OPPORTUNITIES	MARKET	ING ACTIVITY	AUTOMATION	ALL	
Recently Viewed	Þ	номе			Quick2Email	
LoE13 - Pickwick		HOME	Upsell Matrix	Lead Pipeline	Opportunities	ng Onboarding
Haula	1	-			Security Suite Management	
£ PICK01-99	1	MY GAMEPLAN			Assignments	- -
 LoE12 - Pickwick Paper		Туре	Related to	Priority	Targets - Lists	► K K (1 - 5 of 5) Actions
		\$	Bart Simposon	A	Tasks	📞 🏾 🗮 🗙
New Lead to Action!	× 1	٠	Pickwick Paper Mills inc	A	WorkFlow	📞 🏾 🖬 🗿 😐 🗙
🌜 dsghsdfgds	1	\$	Don Trump	В	Referrals	• 🖉 🗰 🗙

2. Select the Create Task option to create a new Task.







Fill in information about the Task which includes the Task • Subject, Status, Due Date and Priority.

SK OVERVIEW				
			Not Started	
Subject:*		Status:*		
Start Date:*		Related to:	Organisation	
			Test Demo LTD	K ×
Due Date:*		Person Name:	Rosie Example Test	R ×
Duration:	None	Priority:*	High	

**5** The Assigned To box lets you select a user to assign the task to. Use the Select Arrow to open up a pop up box to select the user. Once assigned this will appear in the My Open Tasks Dashlet for the Assigned User.

OTHER			
Assigned to:	BS		RX
User Search First Name Last	Name Department	Any Email	
SEARCH CLEAR Users Name 🔶	: Username ⇔	Department 🔶 E	imail
	, in the second s		K < (1 - 75 of 91) > X
Virginia Wright	vw		
Zoe Wright	ZW		

6. When you've completed all the correct information click Save & Close. If you need to change the Assigned User for a Task, you can do so by going into the Task and changing the User in the Assigned To box.

MY OPEN TASKS					✓ •) ×		
						K K (1 - 1 of 1)	K
Close	Subject $\Leftrightarrow$	Related to	Priority ⇔	Status ⇔	Start Date $\Leftrightarrow$	Due Date ⇔	
×	Send end of year accounts	Andrew1234 Gary Butler	Medium	Not Started	12-08-2019 13:01	01-03-2018	/ •