fibreCRM | HEART OF THE PRACTICE

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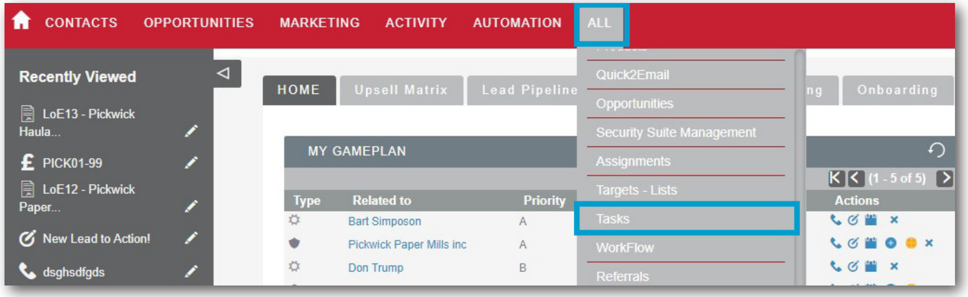
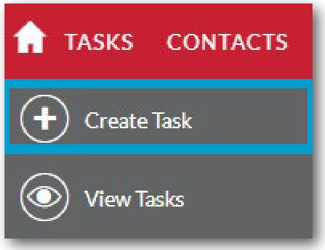
Assigning a Task to a User in CRM

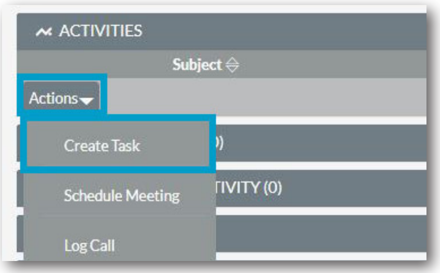
1. **Tasks** are stored in their own module in CRM for reporting purposes, you can create a task by first navigating to the **All** tab on the **Navigation Menu** and selecting **Tasks.**



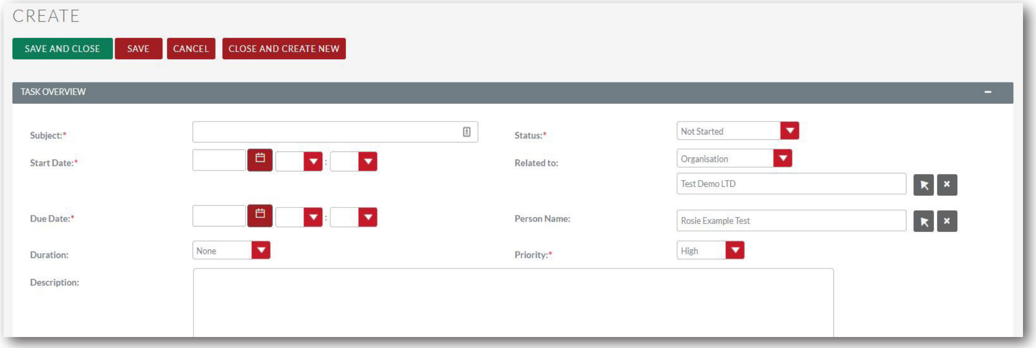
2. Select the **Create Task** option to create a new **Task**.



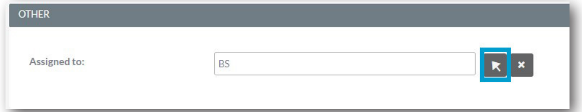
3. **Tasks** can also be created and viewed in any Person, Organisation, Job, Lead or Opportunity record that they are associated with by using the **Actions Menu** in the **Activities Panel** in the record.

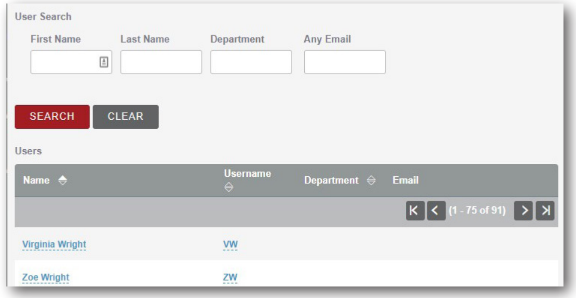


4. Fill in information about the **Task** which includes the **Task Subject, Status, Due Date** and **Priority.**



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.**





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.