

MYOB Advanced – Tasks

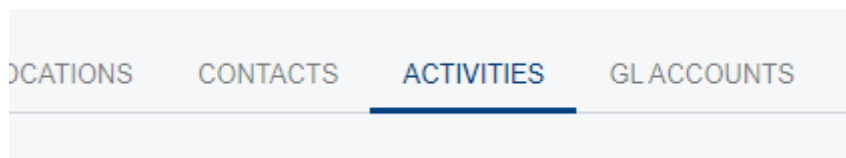
Overview

Using task management capabilities of MYOB Advanced ERP, you can keep personal to-do lists, configure reminders for all tasks or only the most important ones, track tasks assigned to you, create tasks, assign tasks to other users, and follow up on tasks assigned to others. These capabilities help you do the right things at the right time, so you can improve your performance and efficiency.

To use tasks the user must have the role internal user and be an employee and they are under the Time and Expenses module. The site must have the Customer Management enabled.

Tasks can be assigned to yourself another employee or a workgroup.

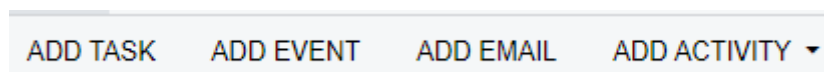
The task can be generated from within the Suppliers, Customers, Projects under an Activities tab



Example of use can be asking someone to run a report, to chasing up a call, or adding a note.

Creating a task

Click on a the Create Task under the Time and Expenses tab or in the Activity screen "ADD TASK"



Enter in a summary of the task None of the other fields need to be completed to create the task. The Owner defaults to your name but can be changed if you need to send internally.

Task

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COMPLETE

COMPLETE & FOLLOW-UP

CANCEL

DETAILS

RELATED ACTIVITIES

RELATED TASKS

* Summary:

Start Date:

☒ Internal

Priority:

Normal

Due Date:

Status:

Open

Completion (%):

0

Category:

Workgroup:

Completed At:

Owner:

Nicola Butler

Time Spent:

00:00

☐ Reminder

Overtime:

00:00

Remind at (Date):

Billable Time:

00:00

Related Entity ...

Billable Overtime:

00:00

Parent:

* Project:

X - Non-Project Code.

Project Task:

Cost Code:

VISUAL

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Paragraph

B

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A

INSERT

LAY




When you save the task, the system returns you to the form you added the activity from and adds a row with the Task type to the Activities tab of the form.

Tasks 

COMPLETE

CANCEL

ALL TASKS










MY TASKS

MY WORKGROUP'S TASKS

FOLLOW-UP TASKS

COMPLETED TASKS

NURTURING

    	* Summary	Status	Start Date	Due Date
   	Test Task	Open		

Setting up a reminder

You can set up a reminder for the task by selecting the Reminder check box

☒ Reminder

and specify on which day before the due date the task owner should receive the reminder in the Remind At box.

☒ Reminder

Remind at (Date)

Related Entity

On the specified date, the reminder will appear on the task owner's MYOB Advanced ERP screen so that the creator or the owner can complete the task.

COMPLETE COMPLETE & FOLLOW-UP

or change its status.

Priority:	Normal
Status:	Open
Category:	Open
Completed At:	Draft
Time Spent:	Processing
Overtime:	Canceled
	Completed

Or if a pop-up reminder is enabled then the screen enters a reminder when overdue and can be opened or snoozed from that screen.

Reminder

Summary	Start Date
Call Bob with new payment details	2/11/2021 12:00

SNOOZE

5 minutes

VIEW DETAILS

DISMISS

DISMISS ALL

The record is also under the activities screen of the item it relates to and remains there when closed.

Supplier Status:	Active	Prepayment Balance:	0.00
Supplier Class:	VENDDFT - Vendor Default		
<div> GENERAL FINANCIAL PAYMENT PURCHASE SETTINGS ATTRIBUTES LOCATIONS CONTACTS ACTIVITIES GL ACCOUNTS MAILING </div>			
<div> ADD TASK ADD EVENT ADD EMAIL ADD ACTIVITY </div>			
Type	* Summary	Status	Start Date
Task	Call Bob with new payment details	Completed	2/11/2021 12:00

Please note: There is currently an issue with the reminders feature and we suggest clients don't use it until Momentum confirms it is resolved.