Add and Manage Task Templates

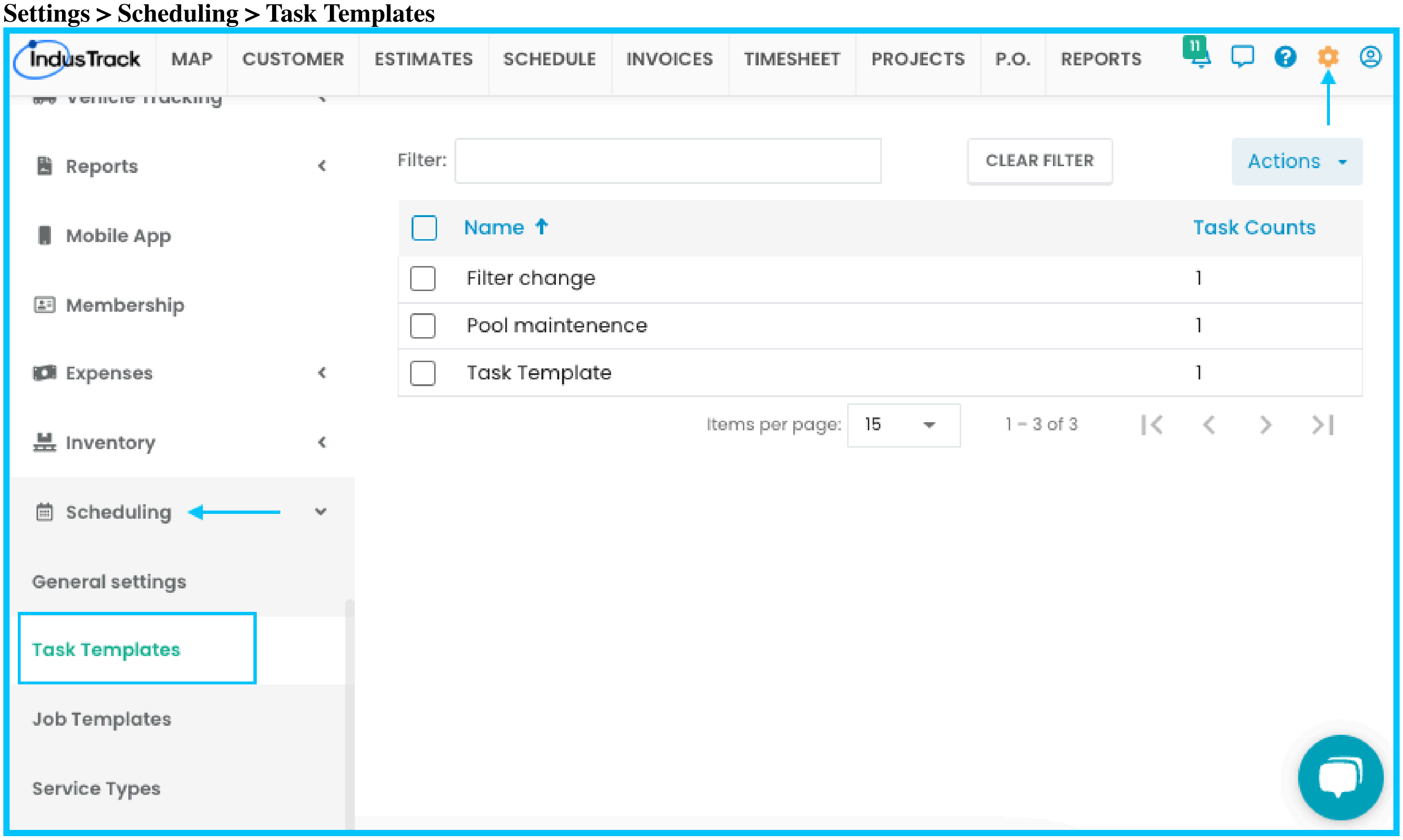
December 14, 2019

Download Add and Manage Task Templates PDF

Task Templates help you save time when you have tasks or services that are done repeatedly in different jobs. By using templates, you avoid mistakes, save setup time, and don't need to re-enter the same details each time.

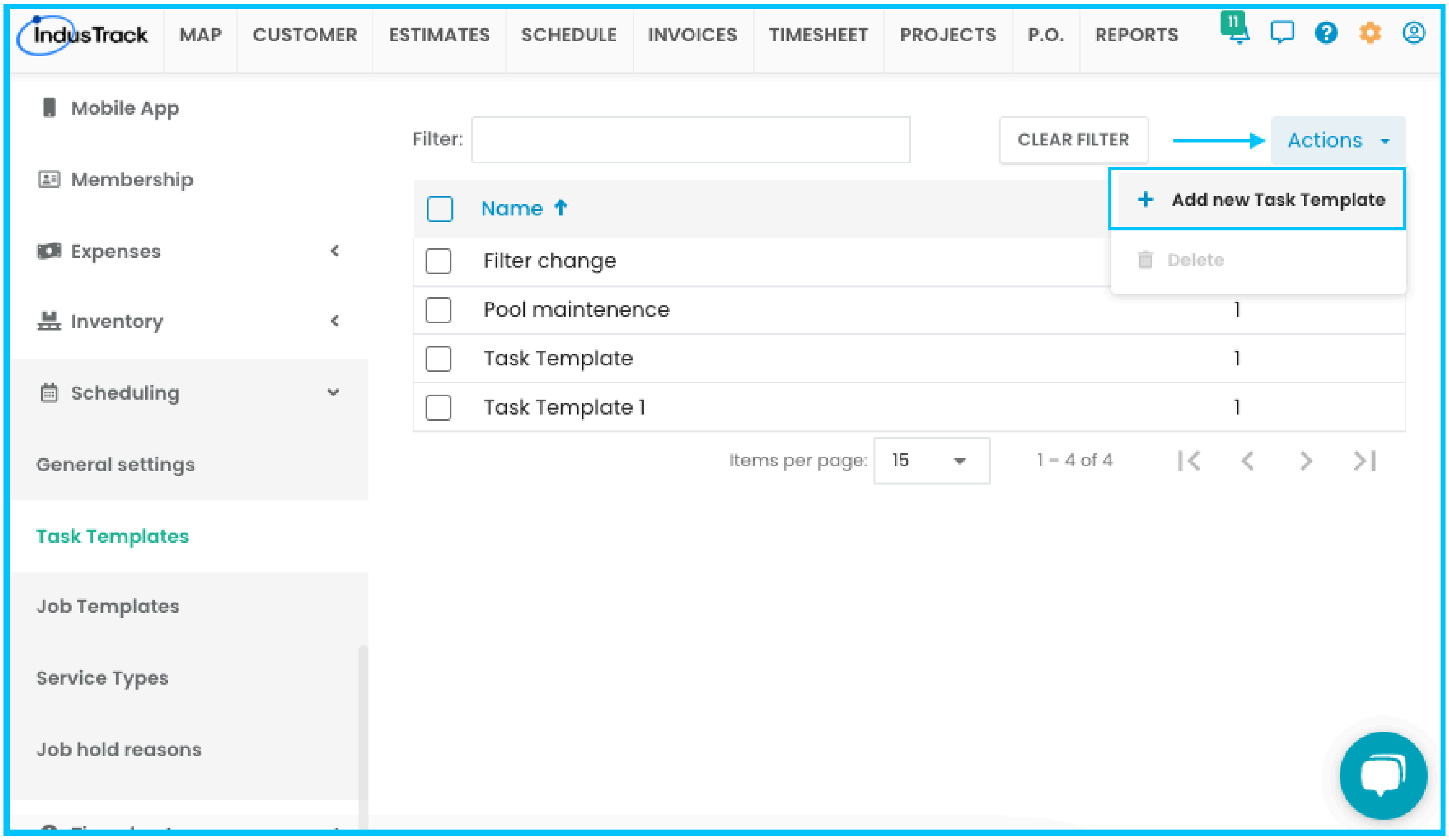
Where to Find Task Templates

Go to:
Settings > Scheduling > Task Templates



Create a New Task Template

1. Click the **Actions** button.
2. Select **+ Add New Task Template** from the dropdown.



Fill Out the Template Details

Fields marked with * are required.

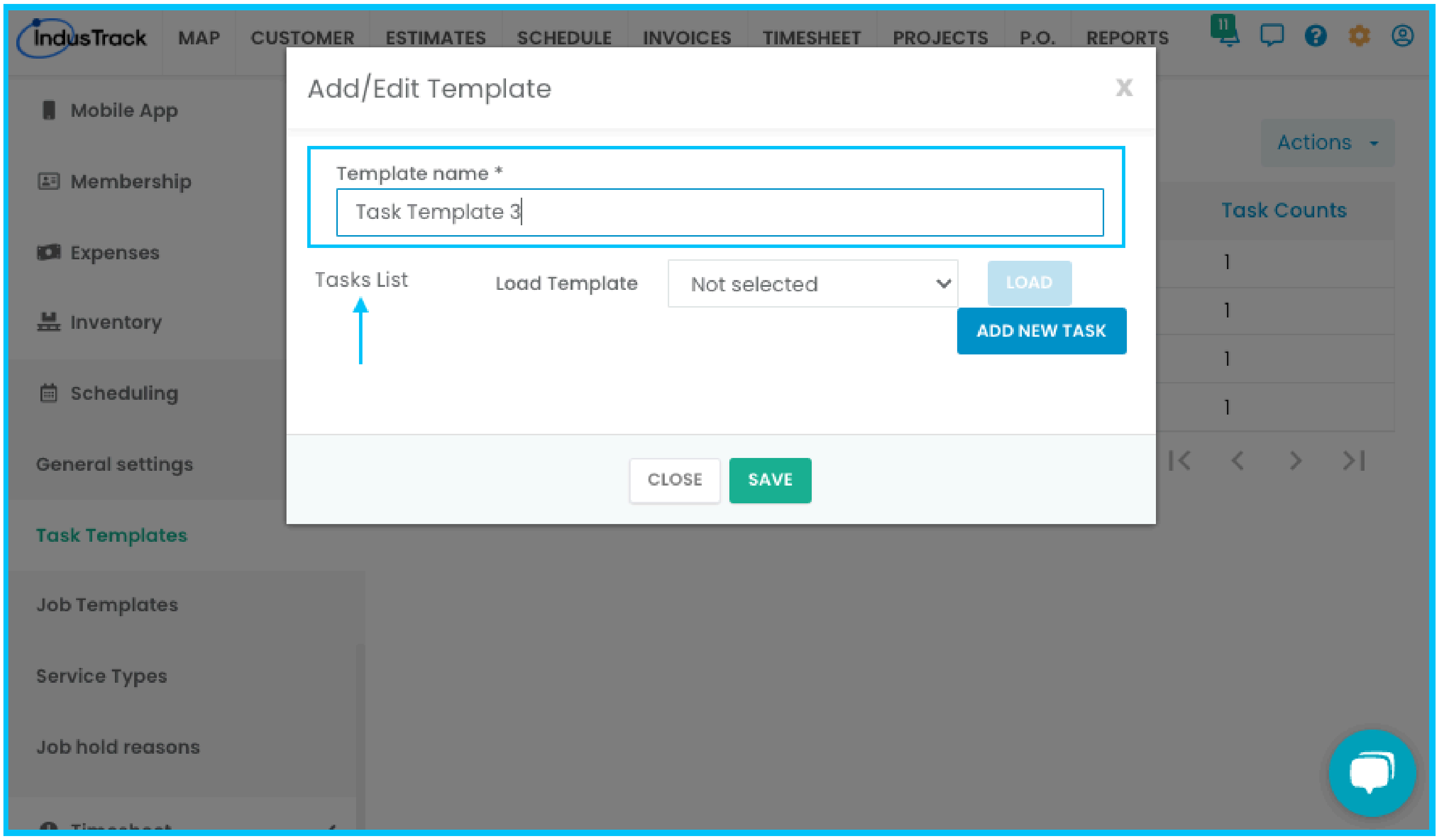
Template Name*

Enter a name for your template.

Task List

You can add tasks in two ways:

- **Load an existing task template**
- **Create a new task**



Option 1: Load an Existing Template

1. Click the **Load Template** field.
2. Select a template from the list.
3. Click **Load** to add its tasks.

   You can edit the loaded tasks if needed—this won't affect the original template.
   To load more templates:

- Save the current one first.
- Reopen it and load another.
- Repeat as needed.

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Option 2: Create a New Task

1. Click **Add New Task** to expand the task section.
2. Fill in the following details:

Task Name

Enter a name for the task.

Service Type

Choose the right type from the dropdown.

Parts/Services/Equipment (Select)

- Type the item name and choose it from the list.
- This can include:
  - Parts or materials (inventory or non-inventory)
  - Service
  - Assembly
  - Equipment

Parts/Services/Equipment (Add)

- Enter the quantity.
- Click **Add** to include it in the task.

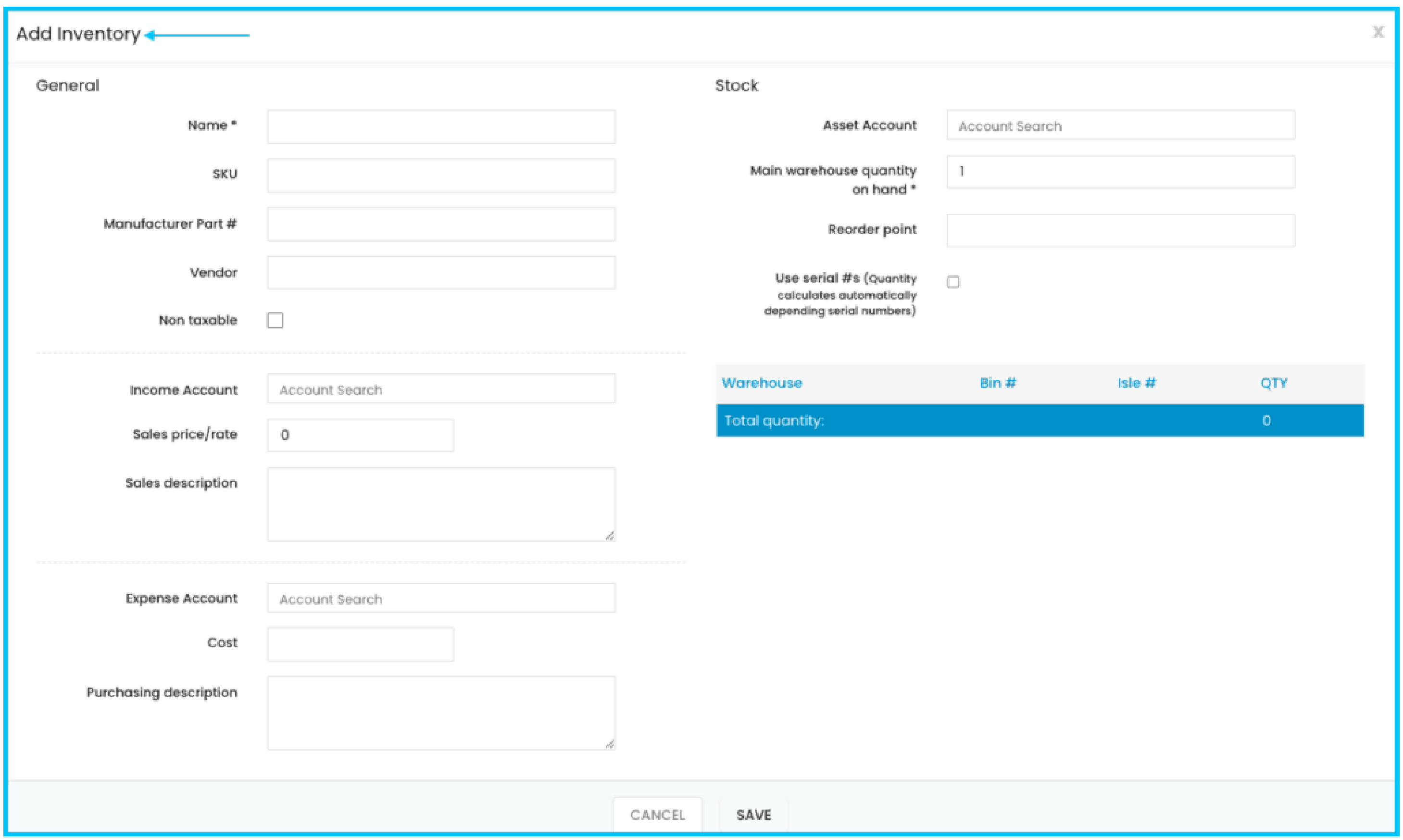
You can continue adding more items the same way.

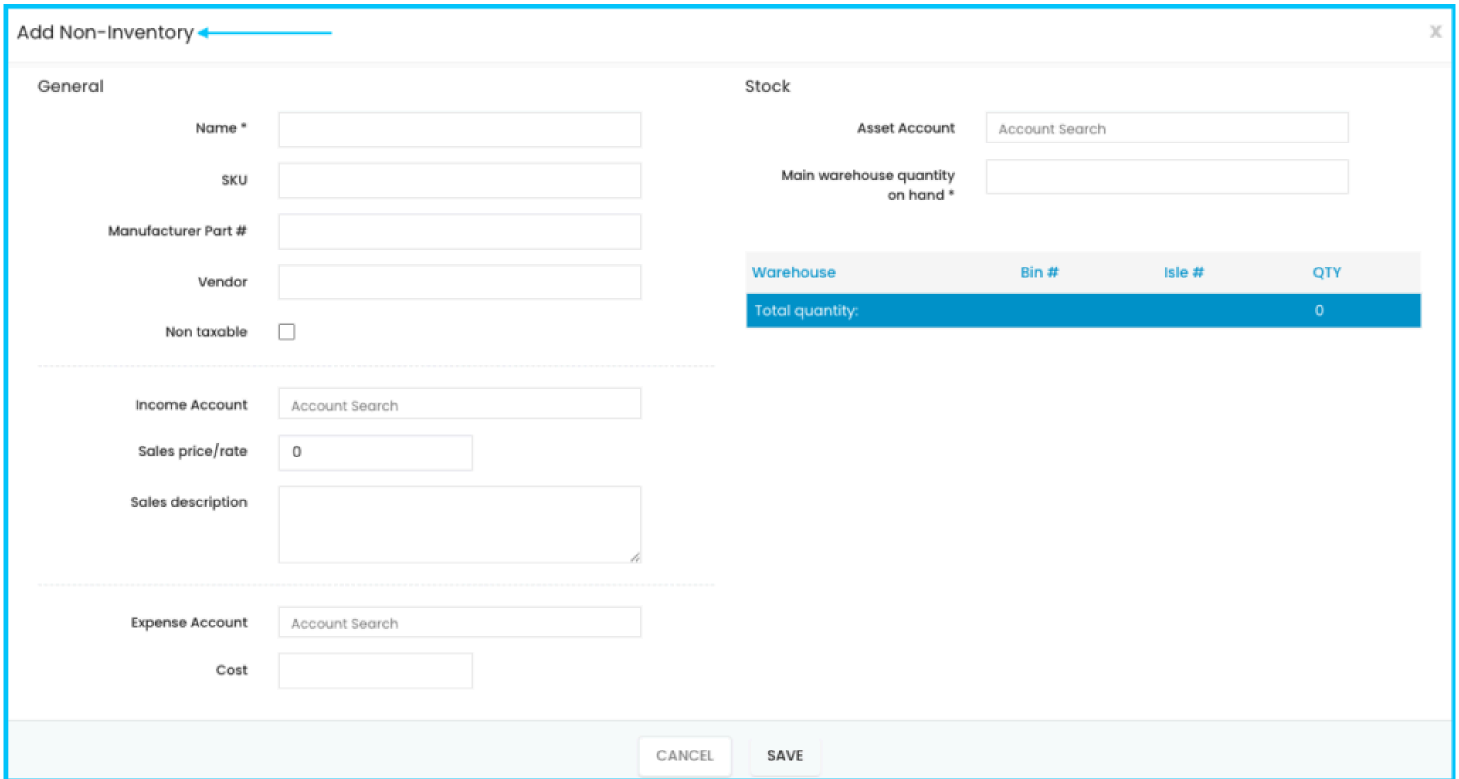
Need to Add a New Item?

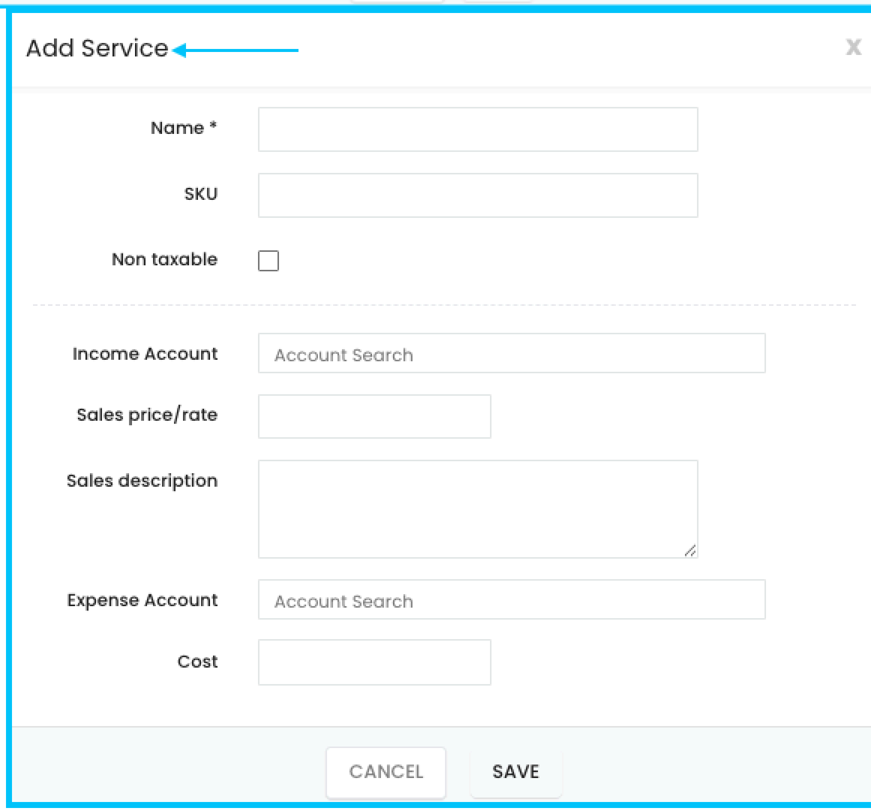
*If the item is a new one and has not been entered into the system (not on the list), create a profile for it first. To do this, go to the Inventory or Equipment page **OR** create the profile straight from the Task Template page.*

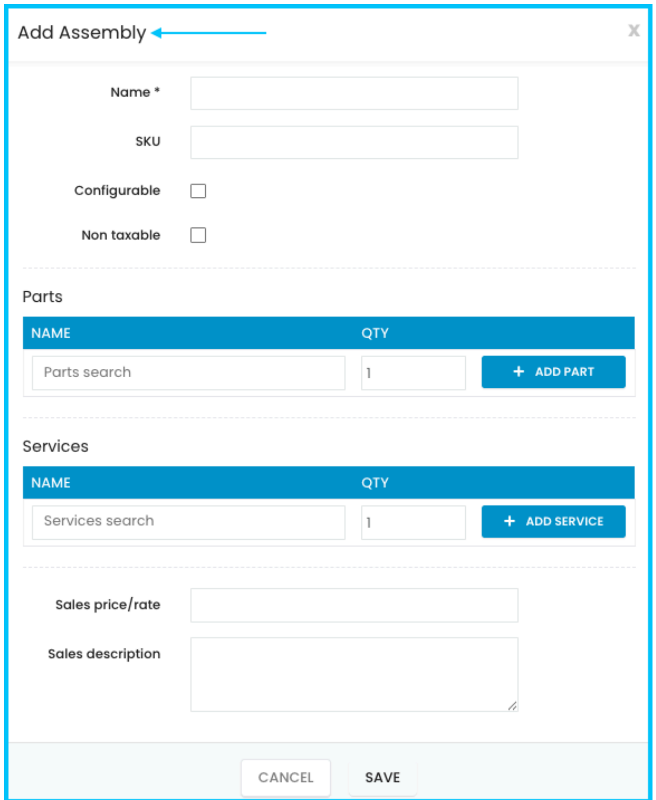
1. Click **Create a New Item**.
2. Choose the type: Inventory, Non-inventory, Service, Assembly, or Equipment.
3. Complete the item profile.
4. Save the item—it will now be added to the system and your task.

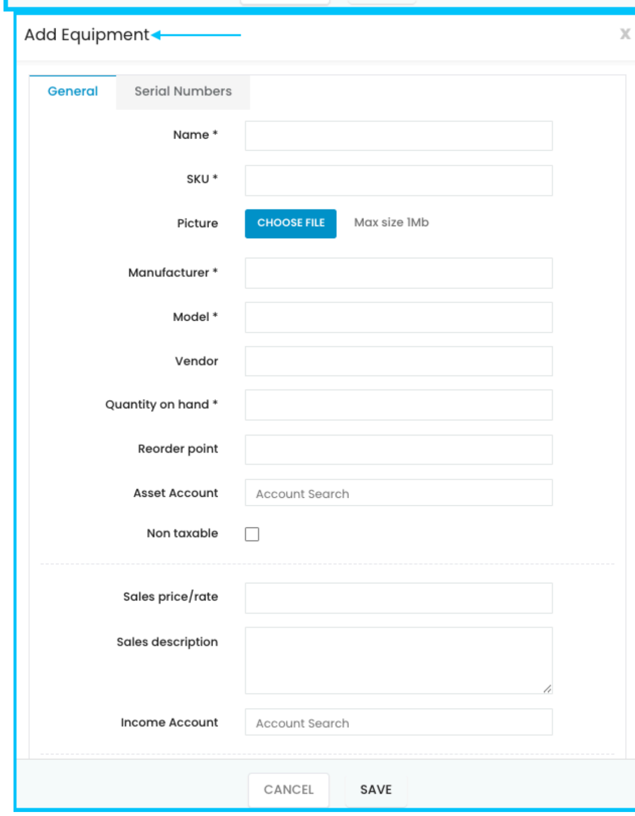
- Depending on the selected Inventory Type, create the item profile on the corresponding window.




Add Non-Inventory
X
General
Name *
SKU
Manufacturer Part #
Vendor
Non taxable
Income Account
Account Search
Sales price/rate
0
Sales description
Expense Account
Account Search
Cost
Stock
Asset Account
Account Search
Main warehouse quantity on hand *
Warehouse
Bin #
Isle #
QTY
Total quantity:
0
CANCEL
SAVE


Add Service
X
Name *
SKU
Non taxable
Income Account
Account Search
Sales price/rate
Sales description
Expense Account
Account Search
Cost
CANCEL
SAVE

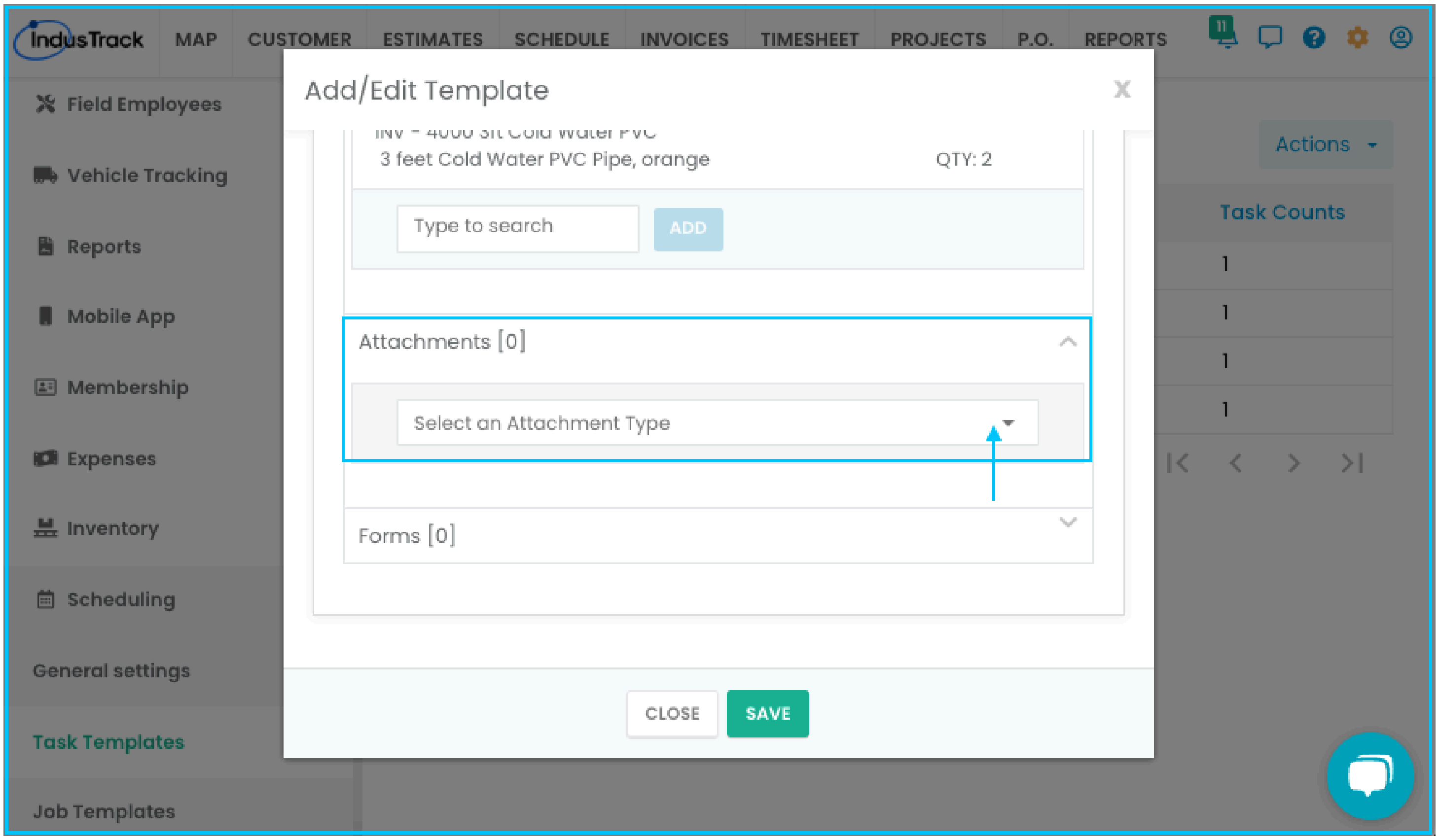




Attachments

You can attach photos, manuals, or other documents.

- Add a link, upload a file, or attach an existing one.



Forms

Attach forms that need to be filled out or signed.
If the form doesn't exist yet, you can:

- Upload it as an attachment
- Add it through the **Forms** page

To add a form:

1. Select the form.
2. Choose when it should be triggered.
3. Click **Add**.

Add as many forms as needed.

Add More Tasks

Click **Add New Task** again to include more tasks in the template.

Save the Template

Click **Save** when you’re done. Your new template will now appear in the list.

Working With Tasks in the Template

- **Reorder Tasks**: Use the arrows on the left.
- **Expand/Collapse Task Details**: Use the arrows on the right.
- **Delete a Task**: Click **Delete Task**.

Edit a Task Template

1. Find the template from the list.
2. Click to open it in **edit mode**.
3. Make any changes needed.
    - To remove a task: click **Delete Task**
    - To remove items (forms, attachments, parts): click the **X** next to the item

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Delete a Task Template

⚠️ Be careful. Deleting a template cannot be undone and may affect other settings or jobs.

1. Check the box next to the template you want to delete.
    - To select multiple, check each one.
    - To select all, check the box at the top of the list.
2. Click the **Actions** button and select **Delete**.
3. Confirm in the warning pop-up.

   The template will be removed from the list.

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