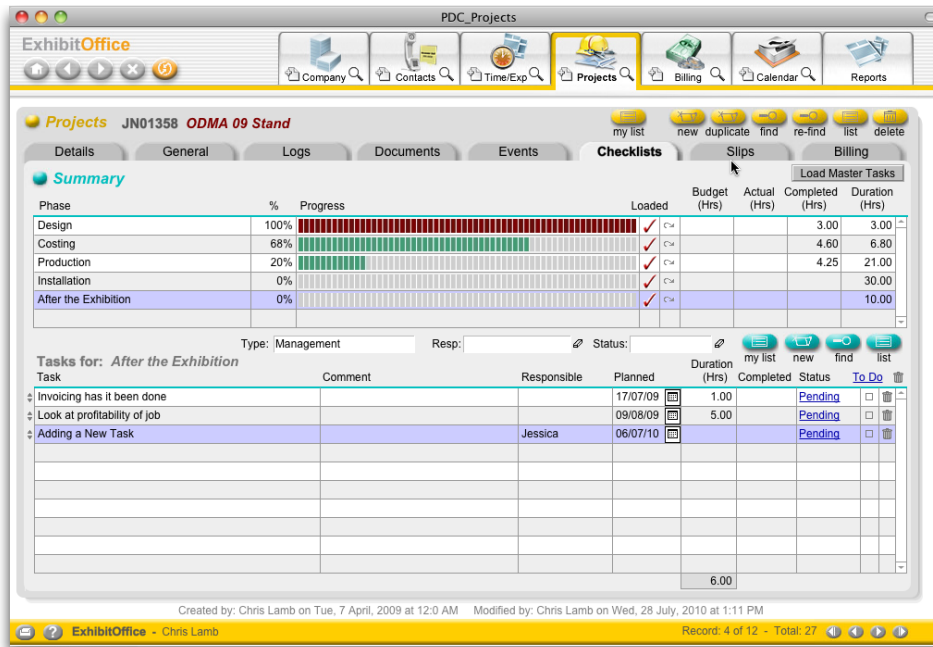


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Put the new task in, along with a Planned Date and a person responsible and then click on "Return to Summary. You will see the new task has been added.

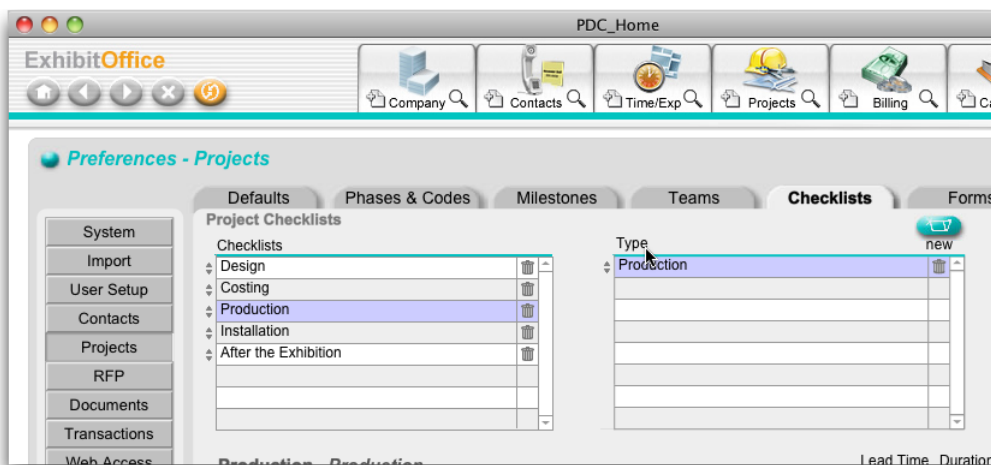


However you might want to add a new task to the preferences so it appears in all future projects you open.

Go to Preferences (if you have the security settings to do so)
Projects
Checklist

For the purpose of this demonstration we will add a task to Production
We will get Sales to remember to talk to Production 10 days out to ensure all is going to plan

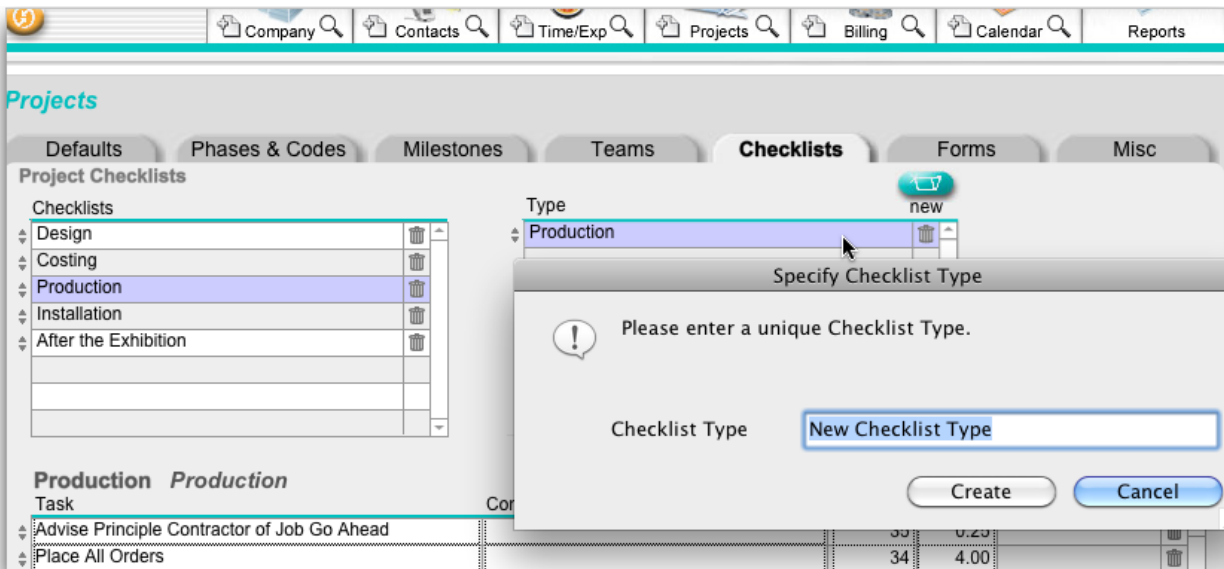
Highlight Production in the Checklists Box
There is no Sales Role linked to the Production Checklist so we will add it



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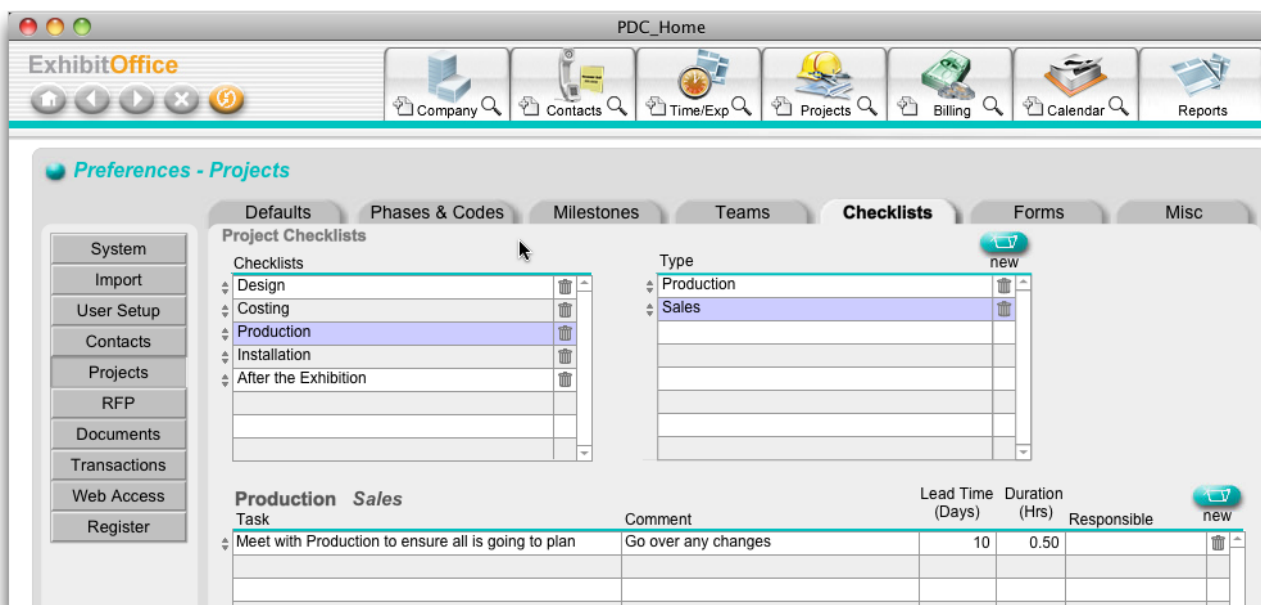
To do that we click on the "New" button to the right of Type



We then type in the Sales Role Name

Once we have a Sales Role Type in this section we highlight it so we can enter a new task.

To enter a new task we click on the "New" button to the right of Production Sales. Then we enter the task details as I have here. I also put in a comment and a lead time of 10 days so it will appear 10 days before the show opens and a duration of half an hour. I am not going to specify a sales person as there may be several.

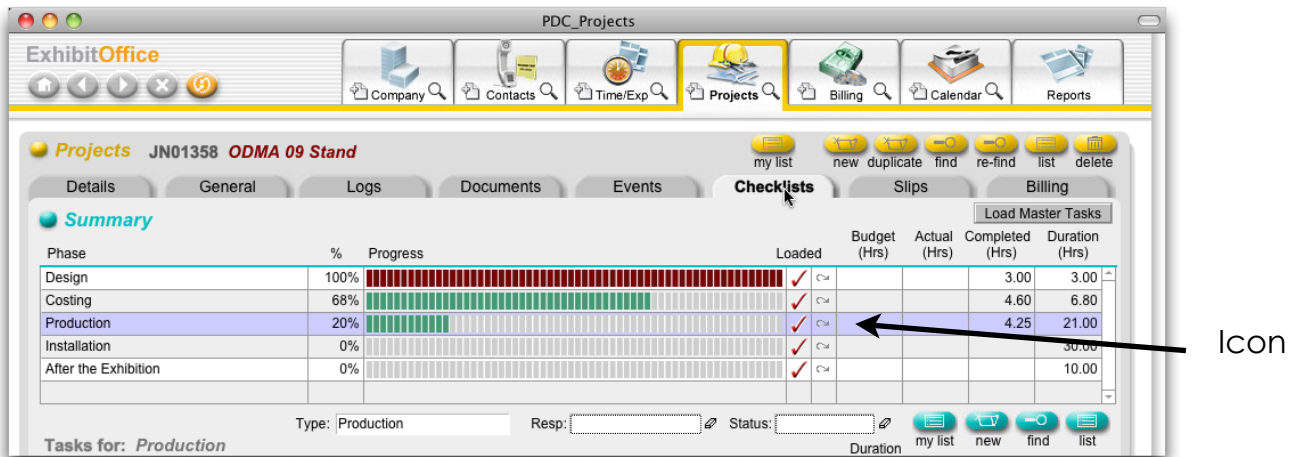


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So now I have entered this into preferences but still need to add it to my current job that I am working on.

Go back to the relevant project and highlight the Production Phase

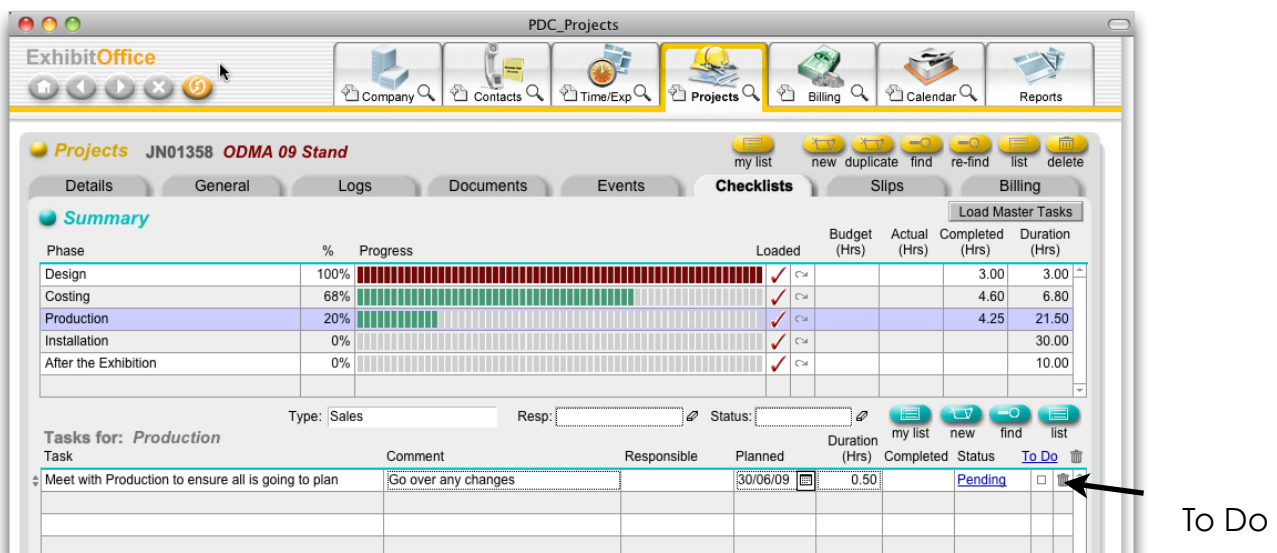


Icon

There is no Sales role under type.

In order to add the recently created Task and Type to this project click on the squiggly icon to the right of the production bar chart

This will add the new task to this project.



To Do

Because it has been added in preferences it will be in all future projects as well.

Remember to have the To Do's added to a staff members To Do List the To Do Square needs to be highlighted