Task Information

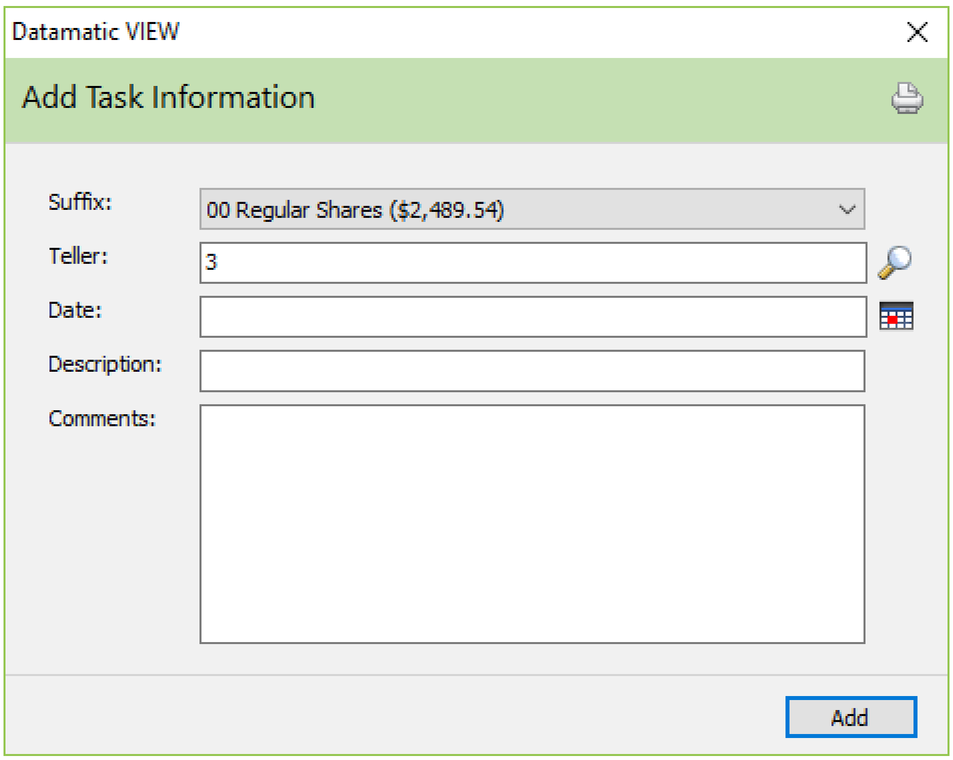
Add

With the member displayed, select one of the following:

- Folders (below suffixes) > Add > Task.
- Select the Tasks folder > Add.

The Add Task Information window is used to add a new task of things to be done for a specific member for a specific suffix. This can be used for a variety of reasons to track different tasks that need to be done and is up to the credit union to decide how this will be used.

The maximum number of tasks per member account (base-check-suffix) is 9,999.



Suffix: Select the suffix from the drop down list to which the new task will apply.

Teller: The teller number that is logged in to the workstation or PC is automatically displayed. The teller number can be changed, if needed. If the teller number is not known, click on the magnifying glass to the right of the Teller field to search for a teller number.

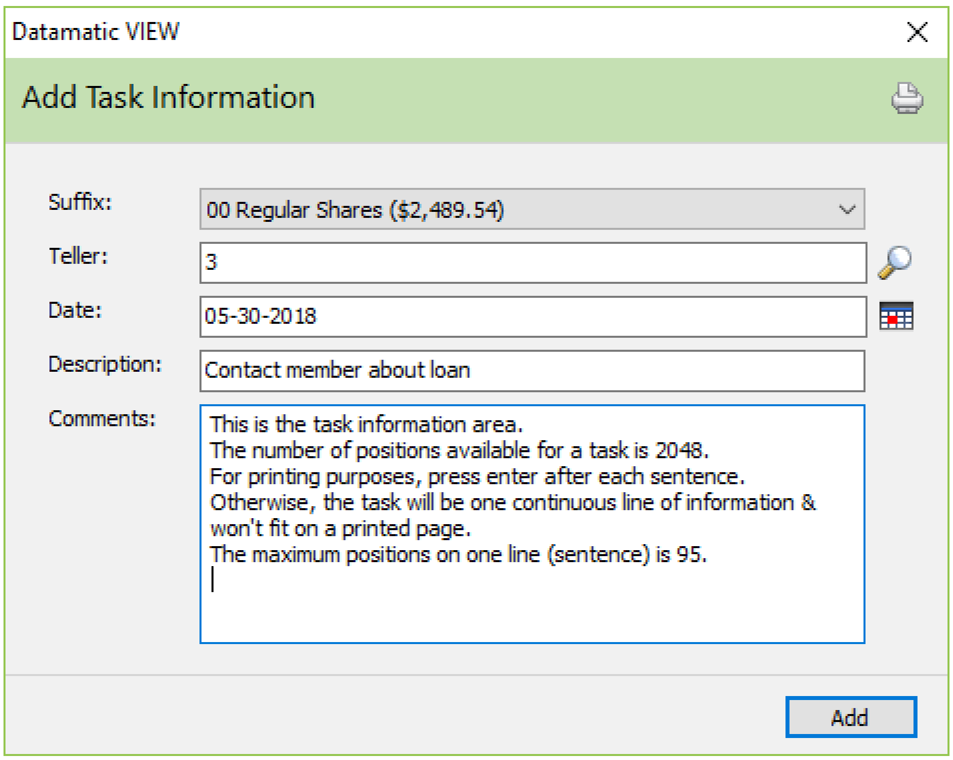
Date: Enter the date for the task to be completed.

Description: Enter a brief description of the task. (25 spaces available.) The cursor will stop moving when the maximum amount of space has been reached.

Comments: Enter more specific information concerning the task. An area of 2048 spaces is available for comments.

Important
For printing purposes, press enter after each sentence. Otherwise, the task will be one continuous line of information and won't fit on the page. The maximum positions on one printed line or sentence is 95.

Example of the Comments area:



Select the Add button to add the task to the system.

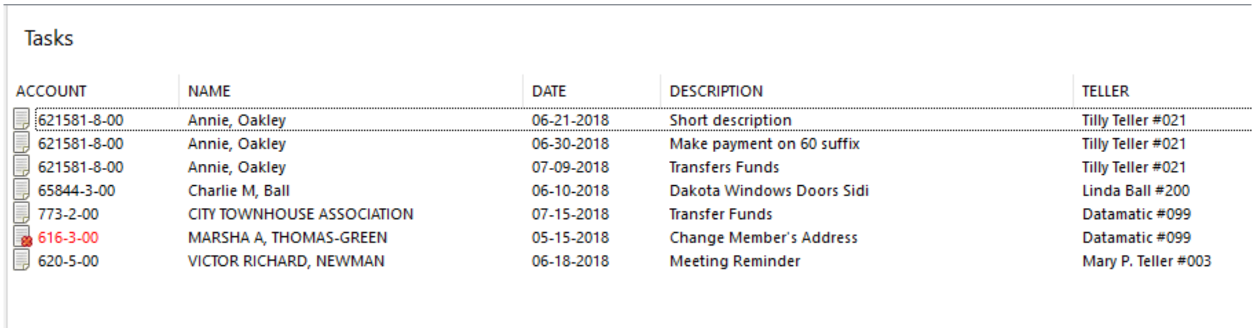
The Task Information icon now displays on the Member Summary window.

Tasks for a specific member can be displayed from the Member Summary window by selecting the Task icon.

All tasks can be displayed by selecting [Main Ribbon > Member > Task].

Display

Select [Main Ribbon > Member > Tasks]. The Tasks on the system are displayed.



Tasks

ACCOUNT	NAME	DATE	DESCRIPTION	TELLER
621581-8-00	Annie, Oakley	06-21-2018	Short description	Tilly Teller #021
621581-8-00	Annie, Oakley	06-30-2018	Make payment on 60 suffix	Tilly Teller #021
621581-8-00	Annie, Oakley	07-09-2018	Transfers Funds	Tilly Teller #021
65844-3-00	Charlie M, Ball	06-10-2018	Dakota Windows Doors Sidi	Linda Ball #200
773-2-00	CITY TOWNHOUSE ASSOCIATION	07-15-2018	Transfer Funds	Datamatic #099
616-3-00	MARSHA A, THOMAS-GREEN	05-15-2018	Change Member's Address	Datamatic #099
620-5-00	VICTOR RICHARD, NEWMAN	06-18-2018	Meeting Reminder	Mary P. Teller #003

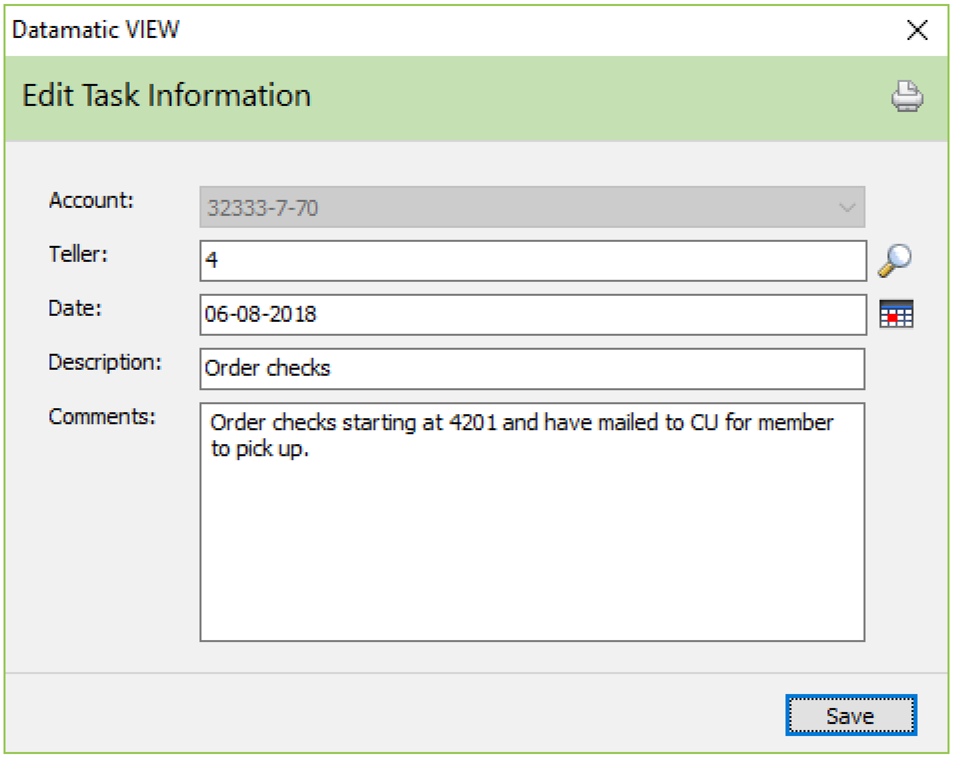
A list of the tasks that are currently on the system are displayed. When the date of the task has passed, the Account Number is displayed in **red**.

The maximum tasks listed in this window is 1,500.

User Tip

The specific Tasks that are displayed and the order of the Tasks displayed are determined under [Main Ribbon > Tools > Options > Tasks].

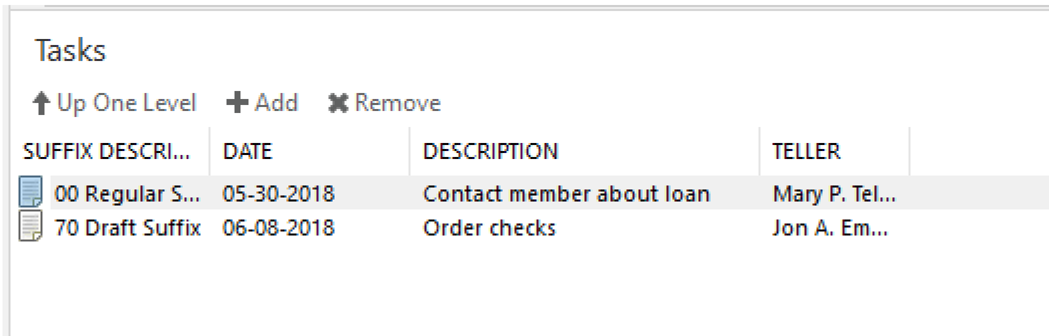
To view the comments area of the tasks, select the specific task.



If needed, changes can be made to the Teller, Date, Description and Comments for the task. Select Save, to save the changes that were made. Otherwise, select the X to close the window.

Display - Member Level

From the Member Summary window, select Task Information. This selection will only display, if Task information has been entered for this member.



The Task Information entries for this member are displayed. To view the Comments area of the task for additional information, select the specific task.

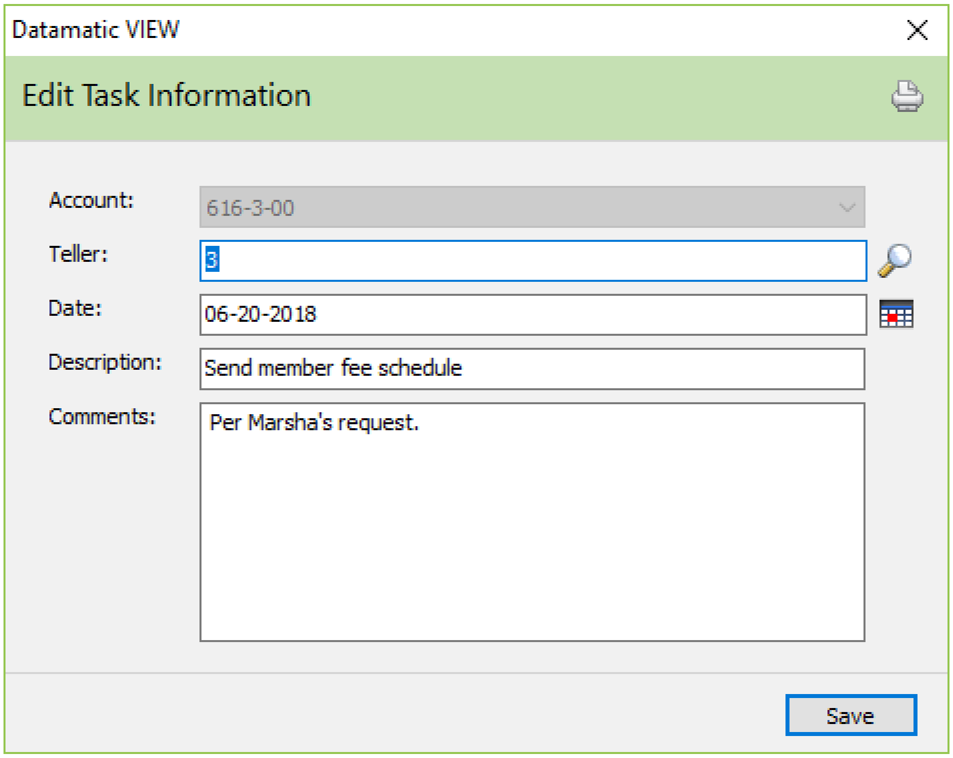
This window can also be used to set up a new task. Select Add to display the Add Task window.

<u>Edit and Delete</u>

To make changes to a task, highlight the specific task and press enter or double click on the task. The Edit Task box is displayed.

To delete a Task from an account, highlight the task to be deleted and press the delete key. A confirmation box will be displayed. To proceed with deleting the task, select yes. Otherwise, select no.

Edit Task



Select Save, after making any needed changes.