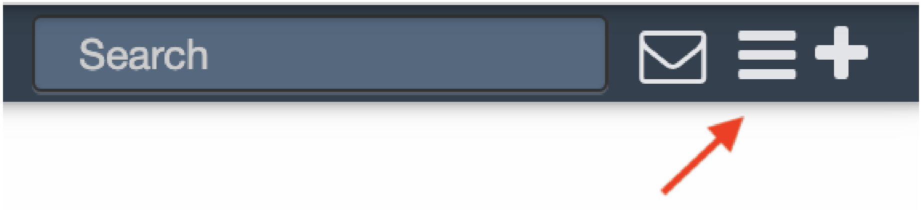
How do I create a task template?

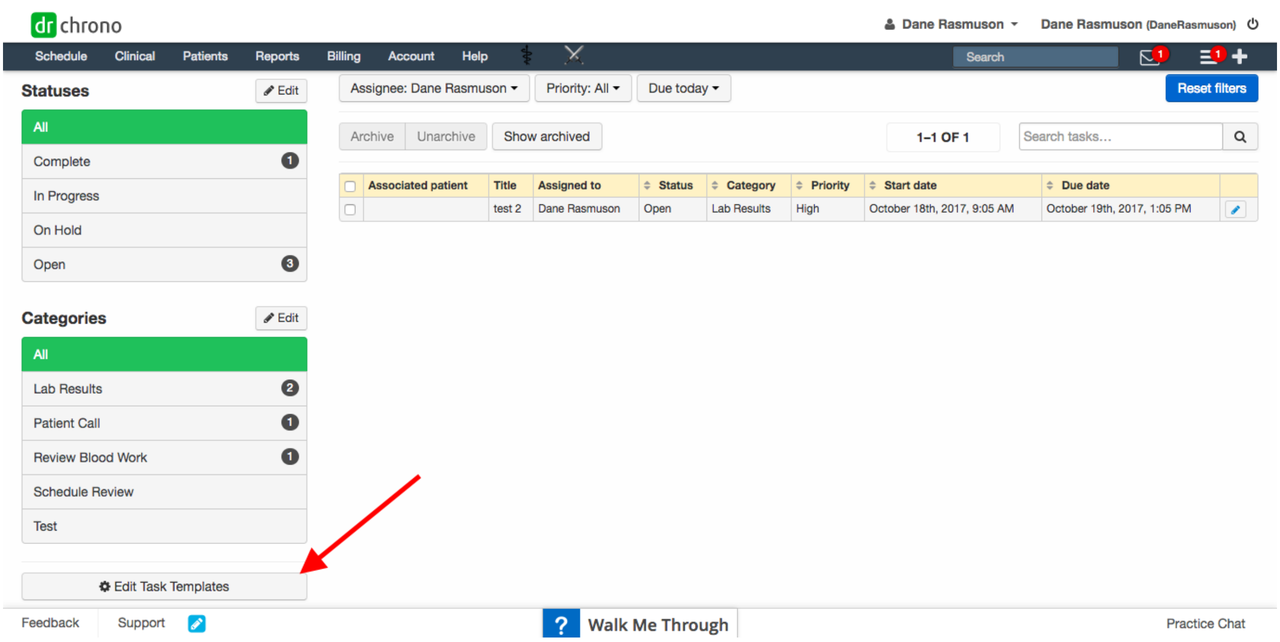
07/24/2024 3:55 pm EDT

Creating and editing task templates provides offices with customized options for how the tasks will function that best fit your office workflows.

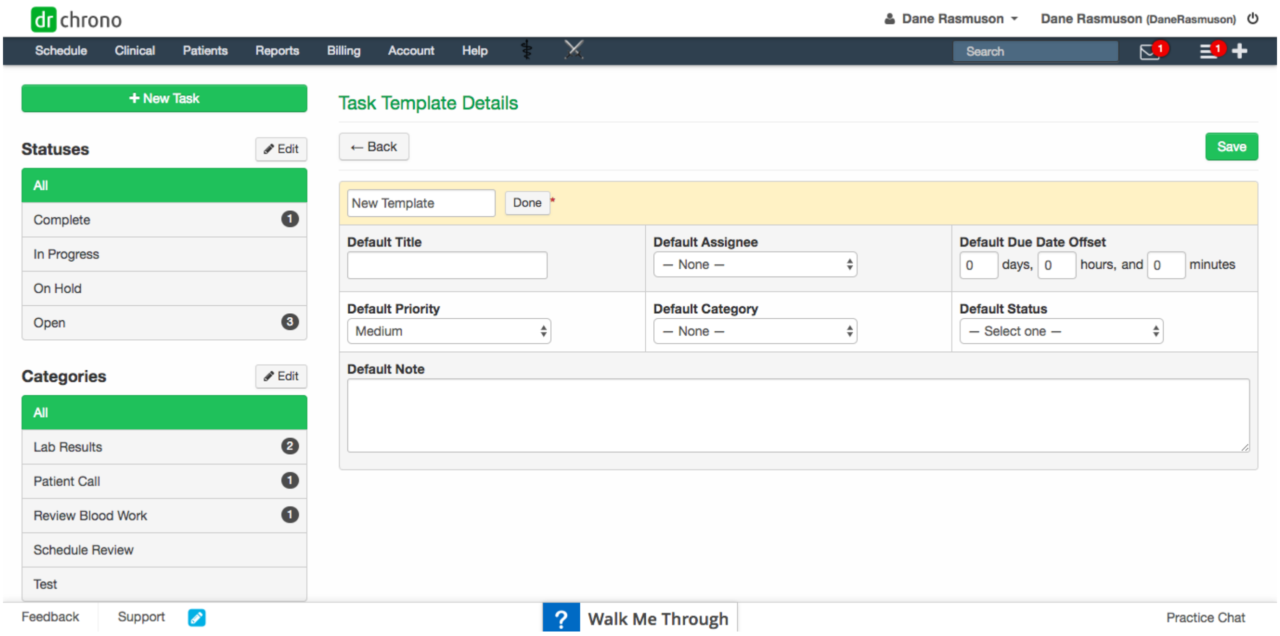
1. Please access the task center (

), and click on **Edit Task Templates** towards the lower left of the page.





2. Once you are on this page, please click on the **+ Create New Template.** You should see the screen below.



Our template tool makes creating these task templates quick and easy. Once you decide exactly which options work best for your practice, you're all set.

3. After giving this template a name, default assignee, due date, priority, category, and status, please be sure to click **Save**.

Note: If the default assignee leaves the practice and is made inactive, please ensure any task templates assigned to the inactive user are reassigned. The default assignee will become the 1st active user in the drop-down.

You're also able to **Archive** a template if it is no longer needed.

After creating a few templates, your library will contain your templates. Select **Edit** to make any changes to the template.