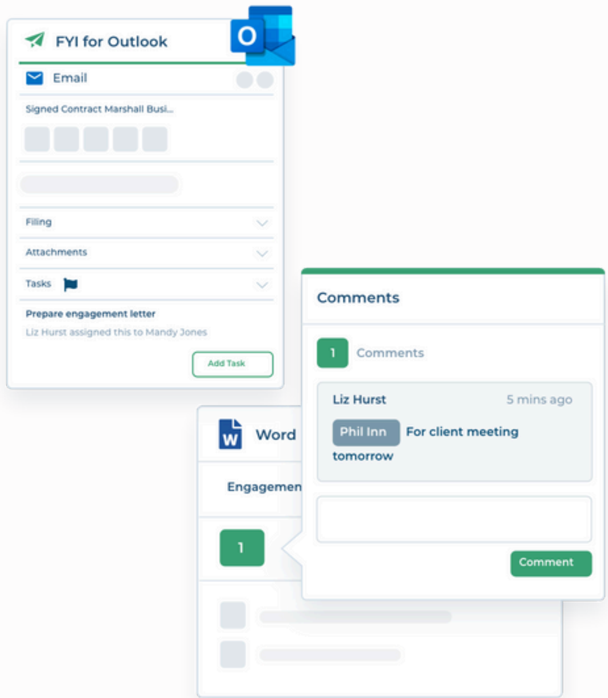
Top Tips for Productivity with Tasks & Comments

Best Practice Guide

Manage your work with maximum efficiency

Use Tasks and Comments to delegate and collaborate with ease.

- Overview of Tasks and Comments
- When to use Tasks and Comments
- Best Practice Working with Tasks, Comments and Notifications



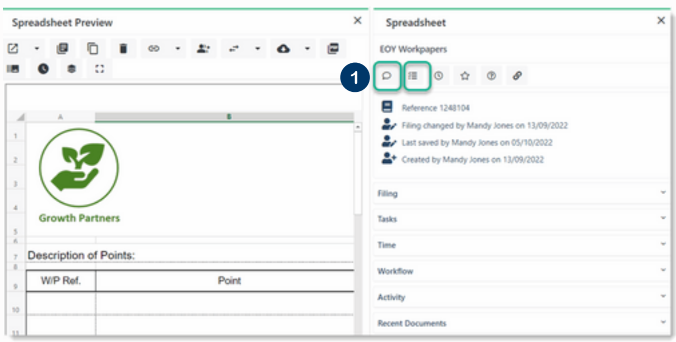
Overview of Tasks and Comments

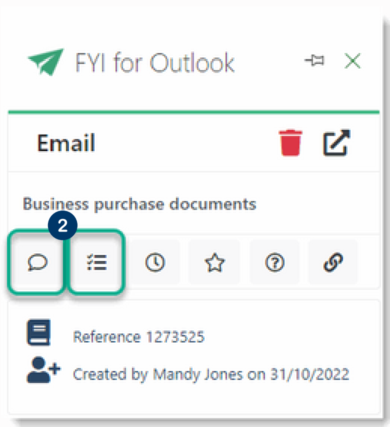
Tasks and Comments are available across emails, documents, clients and jobs so you can work effectively together as a team and reduce the need of sending emails internally.

1. Tasks and Comments in the drawer for Documents.
2. Tasks and Comments in the drawer for Emails in Outlook and Documents in Office.

These productivity tools are just a click away with quick access from the drawer in FYI, Office and Outlook.

[Refer to Tasks and Comments for more details.]





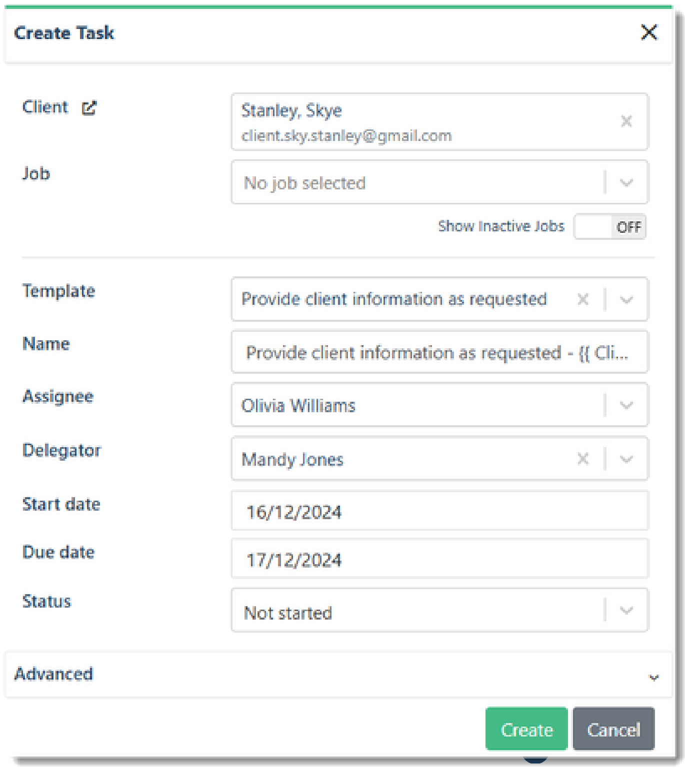
When to use Tasks and Comments

When to use Tasks

Tasks are **actionable outcomes** that are used like 'to-do's'.

For example, if you'd like a team member to follow up a request from a client email, instead of forwarding this email to your team member, **create a task** and assign it to be actioned.

Tasks are used to set up a future action or to trigger a reminder.



Quick tips on when a task might be used and how they can be used:

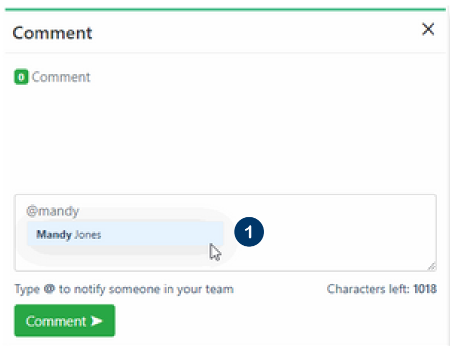
- Create tasks for yourself or delegate to another user.
- Tasks can be created for emails or documents or interactions in FYI. As well as for Word, Excel or PowerPoint documents, you can create Tasks for PDFs, Phone Calls, File Notes, Meetings, or any type of file you have uploaded.
- Referencing the document or email directly saves time by providing context for the task.
- You can have multiple tasks attached to a document or email.
- Create stand-alone tasks that do not reference a client, email or document. These tasks can be used internally for practice reminders.
- Tasks can be created from within Office or Outlook. After filing the email or document, use the FYI drawer to create and assign a task.

When to use Comments

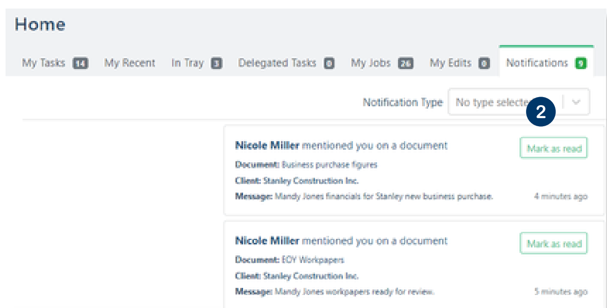
Comments are used for **informational and contextual purposes**.

For example, to follow up on the progress of a task you can **use comments** to request an update from the assigned team member, or you could use a comment to **notify a team member** of a client email so they're aware of the correspondence rather than forwarding or copying them in.

Comments allow the team to ask each other questions, provide updates and commentary on specific documents, tasks and jobs, streamlining internal collaboration and eliminating internal inbox noise.



1. When using comments, if you'd like a team member to be notified use the mention function by simply typing '@' and selecting the relevant team member.
2. This will tag and send a **Notification** to the user.



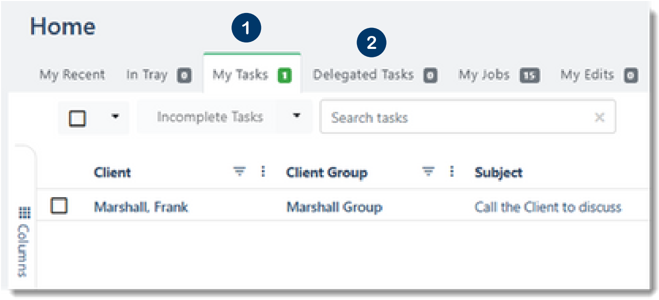
Working with Tasks

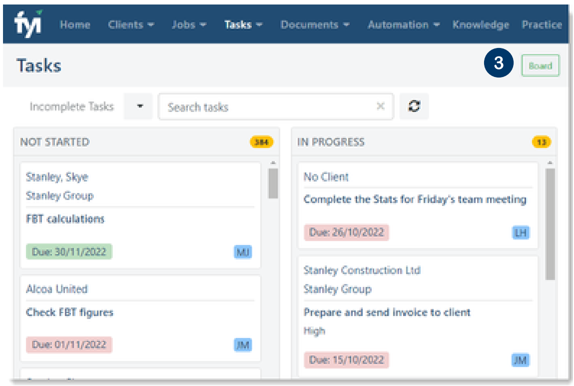
Displaying Tasks

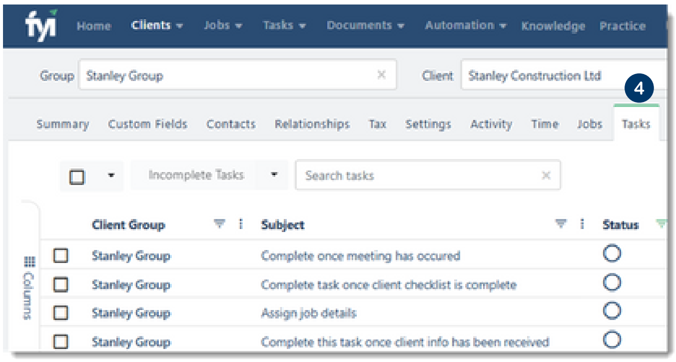
Display a complete list or board of outstanding tasks assigned to you, by client, job, or across the entire practice.

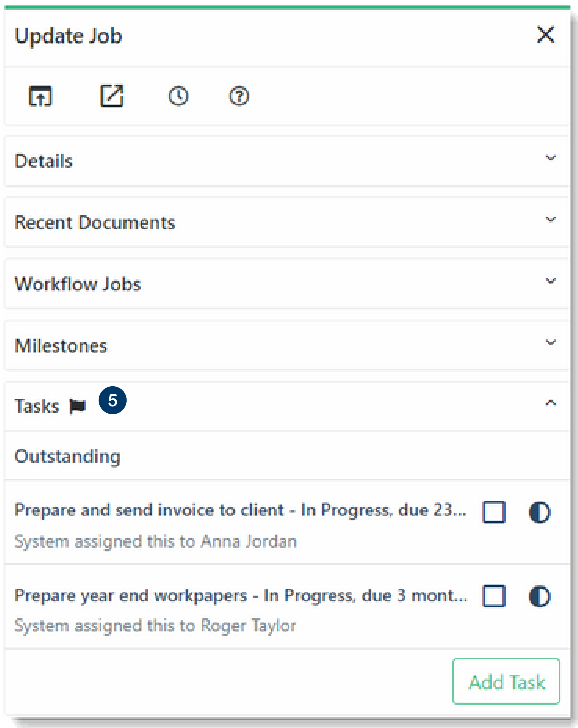
Tasks assist with keeping track of workloads and delivering consistent levels of client service, with no task falling between the cracks.

1. From the Home workspace, **My Tasks** displays tasks that have been delegated to you by others, or that you have assigned to yourself.
2. **Home - Delegated Tasks** displays tasks that you have delegated to other members.
3. From the Tasks workspace - switch to the **Board** view to display outstanding tasks for all clients across the practice.
4. From the Client Workspace the **Clients - Tasks** tab displays a list of Tasks for that client.
5. From an email, document, or job - open the **Tasks section** in the drawer to display the Tasks attached to that email, document, or job.









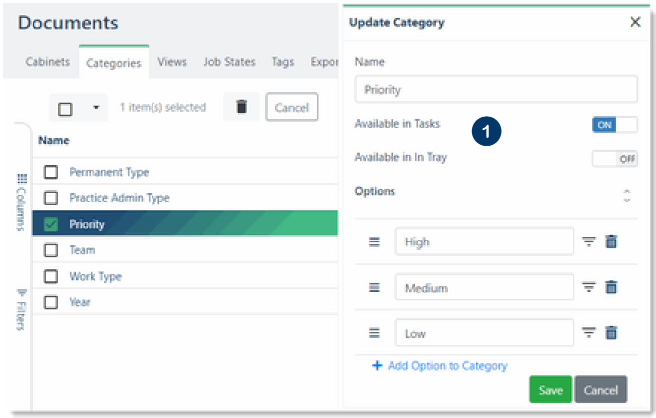
"FYI's task system is outstanding and has had a profound effect on limiting the number of emails we send as a business."

JARROD BRAMBLE,
PARTNER
CUTCHER & NEALE

Managing Task Categories

Shared task lists make it easy to see who's doing what and to ensure that nothing gets missed.

Categories and custom Task Views ensure to-do lists can be accessed with a single click, allowing your team to focus on the correct priorities.



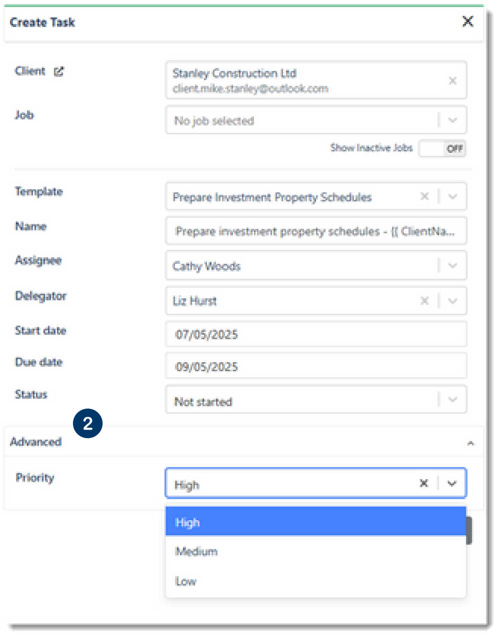
1 Categorise tasks in FYI using parameters that are important to your practice.

For example, you can create categories such as Priority or Team which can then be filtered in your Task Lists.

Follow these steps to set up Task Categories:

1. Go to **Practice Settings - Documents - Categories**.
2. Create a **new Category** and add the required Options.
3. Set Available in Tasks to '**On**'.

2 The Category will be available in the **Advanced** section in the drawer for users when they create and update tasks.



Tip: Create custom views using these categories and segment your to-do lists in just a click!

For example, create custom views for each priority level, each team or for overdue tasks.

You can use these views in Automations to trigger reminders, so nothing slips through the cracks.

Best Practice Working with Tasks

Build clear to-do lists for everyone to access, to:

- allow your team to focus on what they need to complete
- enhance team productivity by allowing the team to plan their day with ease.

When a task is created, it becomes part of a workflow which will send notifications to relevant users when:

- the task is created
- the status is completed.

Tasks can be updated and actioned from the drawer. The FYI drawer is where you can:

- **Preview** or **open an email or document** relating to the Task. When a task has been created for an email or document, the email or document will display as a hyperlink in the Task Drawer. Clicking this displays the relevant email or document.
- Add **Comments** to the Task
- **Update** the Task status and any filing details
- Update **Assignee** and **Delegator**
- Add **Time** for a Task.

When creating a task, set the the role of assignee and delegator:

- The assignee is the team member who will complete the item of work
- The delegator is the team member that has requested the work.
- This allows for effective task management and team collaboration so everyone knows what they're doing versus what they're monitoring.

It is important to maintain the status and categories to provide full visibility 'real-time' into work that is being completed by the whole team.

You can update the status of a Task by:

- clicking the Status icon in My Tasks to set the task to complete
- selecting the task in the Tasks list to open the Task drawer
- dragging the task to the correct status in the Board view.

If required, a task can be re-opened at any time by updating the Status.

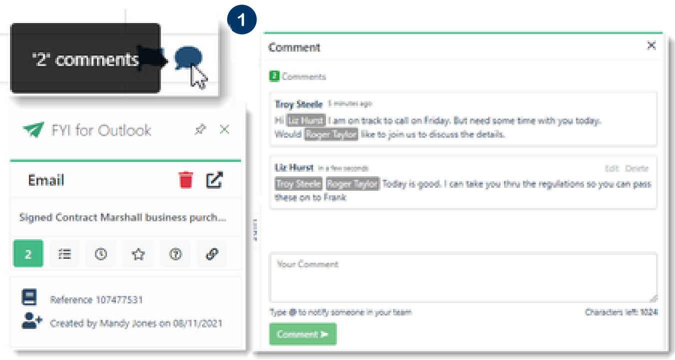
Best Practice Working with Comments

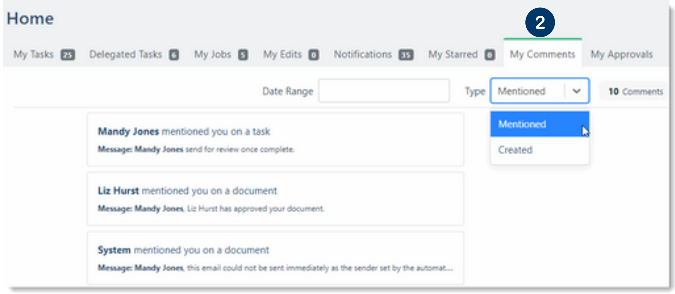
1. Identify emails and documents where comments have been added.

   The names of one or more users can be included in a comment and notifications sent to those users referenced in the comment.

   The history of all comments is stored and displays when the comments are opened.

2. Go to **My Comments** in your Home workspace to display documents for which you have created a comment for, or where you have been mentioned.
   - This displays the name of the person who created the Comment and it also displays the message.
   - Click on the first line of the summary to display the details of the relevant document in the drawer with the Comment pane opened.





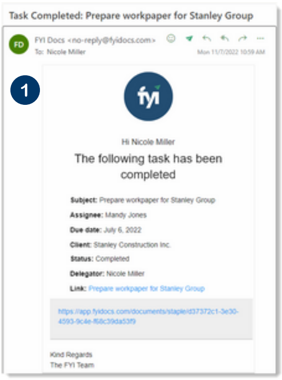
Best Practice Working with Notifications

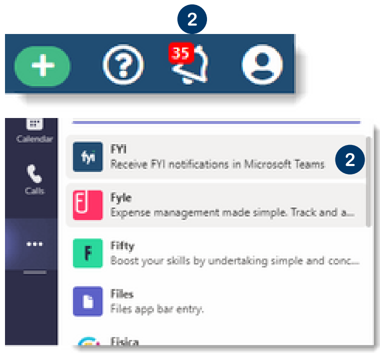
There are a few ways to ensure you're kept in the loop and notified as needed:

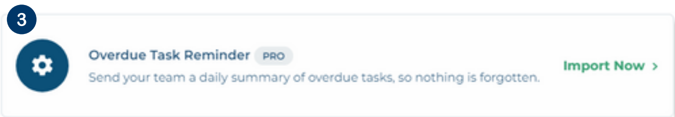
1. The delegator of a task is notified when the **Status** of a task is marked as Complete. The notification includes the name of the user who completed the task.
2. Notifications about Comments and Tasks display in the Bell icon and the Home - Notifications tab. Notifications can also be received via Email or Microsoft Teams.
3. Set up custom processes using FYI's Automation feature to send reminders. For example set up an overdue task reminder on a scheduled basis to alert assignees until tasks are complete or updated. Summary Notifications from a process can be received by Email only.

Refer to Overdue Task Reminder and import this Automation into your FYI platform

Consider other alerts or notifications the team might require and set up any further custom processes to work better together and ensure everyone is kept in the loop.







Delegate and manage work with ease.

For more information on Tasks & Comments, visit the FYI Help Centre at support.fyi.app