

## Managing Tasks

One of the many advantages to using TheJobWorx is the ability to record tasks – things you need to do.

Setting tasks for yourself is an important part of introducing structure to your job hunting and to getting the maximum impact from the time you spend looking for a job.

Tasks can be added on their own or associated with specific opportunities.

### To add a new task:

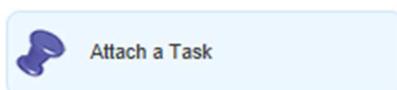
1. Click **Add New Task**.  
A blank form appears where you can now record what you need to do.
2. Fill out as much information as you have for the task you need to complete.
3. Select the **Task Type**.  
*There are three task types: Progress, Submission and Interview.*  
*If the task is about finding more information on the opportunity, select **Progress**.*  
*If the task is about submitting an application, select **Submission**.*  
*If the task is about an interview, select **Interview**.*
4. Add as much information as you can, especially any thoughts you may have on how to go about the task, as this will help you later when you come to do it.
5. If the task is related to a particular opportunity that you already have in your dashboard, select it from the **Related Opportunity** drop-down list.
6. If the task is related to a particular contact that you already have in your contact list, select them from the **Related Contact** drop-down list.
7. Set yourself a target date for getting the task done.  
This is important as it will help you see what tasks need to be done on a given period and you can get your to-do list from the Reports section.
8. Click **Add** to save the task.

### To add a task to an opportunity:

1. Go to your Dashboard.



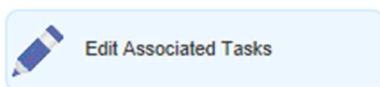
2. Click on the opportunity you want to associate the task with, to view the details.
3. Click the **Attach a Task** button.



4. Fill in the details of your task, making sure to add enough information to allow you to know what you need to do when you go to perform the task.
5. Set a target date for completing the task in the **Task to be completed by** box. When you click into the box, a calendar will appear to help you set a realistic date.
6. Click **Add** to save the task and attach it to the opportunity.
7. You can now see the task in the opportunity details and in your Task area.

### To change what tasks are associated with an opportunity:

1. Click the **Edit Associated Tasks** button.



2. In the **Select** column, tick the tasks you want associated with the opportunity and untick any that are not to be associated.

Completed By	Select
18/10/2013	<input type="checkbox"/>
24/01/2014	<input checked="" type="checkbox"/>

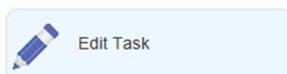
3. Click **Save** to save the changes.
4. The opportunity details will now show the tasks you chose associated with the opportunity.

### To edit or update a task:

1. Go to your task area.



2. In the task list, click on the task that you need to update.
3. Click **Edit Task**.



4. Update or change the details of the task or make notes if you have been working on it.
5. If the task is complete, select **Yes** in the **Task Complete** drop-down box.
6. Click **Update** to save the changes.

### To delete a task:

1. Go to your task area.





2. Find the task you'd like to delete and click on the dustbin icon.



A confirmation message will appear.

3. Click **OK** to delete the task, or click **Cancel** to keep the task.