

SureClose – Add a Task

Add a Task

Most of your tasks will be added to your file based on the template selected to create the file. However, you can manually add tasks as needed.

Steps

1. On the navigation pane, click Files. Recent Files open at the top of the navigation pane.
2. Locate the file you want to work with.
3. With the file opened, click Tasks.
4. Click Add.

Note: If the file does not have an existing task (see image below), the Add button will not be active. Continue to Step 5 and complete the following fields.

5. Under **New Task Entry**, complete these fields:
 - **Task Name** – type the task name.
 - **Description** – type the task description.
 - **Folder** – select the folder to place the task under. If needed, add a new folder.
 - **Status** – select the task status from the list.
 - **Deadline Type** – Select the deadline type from the list.

- **Deadline Type** – Select the deadline type from the list.

Note: Other fields may become active depending on the **Deadline Type** selected. For example, **Due Date** and **Time** fields only display for tasks assigned the **Deadline Type, Fixed Deadline**.

- **Due Date** – type the date the task is due.
- **Time** – enter the time of day the task is due.
- **Responsible Role** – select the role of the person responsible for completing the task from the list.
- **Record this task on the Activity Log** – select if you want to record the task on the Activity Log.

6. Under **Task Permissions**, assign file permissions for each party listed.
 - **Viewable to all parties with access to this file** – select to allow all parties on the file to view the task.
 - **Full Control** – (default) select if the party can add, edit or complete tasks.
 - **No Access** – select if the party cannot view tasks.
 - **View** – select if the party can only view tasks.
 - **Edit** – select if the party can add, edit or complete tasks (same as full control).
7. When finished, click **Save** or **Add Another** to add another task. The new task is added to the Tasks page.

New Task Entry * Required Fields

Task Name: * Description:

Folder: *

Status: * Deadline Type: *

Responsible Role:

Record this task on the Activity Log

Task Permissions

Viewable to all parties with access to this file

DeMora, Sam : (Seller)	<input type="text" value="Full Control"/>	Lockey, Beedie : (Lender)	<input type="text" value="Full Control"/>
Hennessey, Pam : (Site Admin)	<input type="text" value="No Access"/>	Pam, Lisa : (Buyer/Borrower)	<input type="text" value="No Access"/>
Hilton, Mr. Scott : (Site Admin)	<input type="text" value="Full Control"/>	Schnieder, Fred : (Buyer/Borrower)	<input type="text" value="Full Control"/>

Single click to select a task. Double click to edit. Ctrl + Click to select tasks individually. Shift + Click to select consecutively.

There are no tasks on this file.