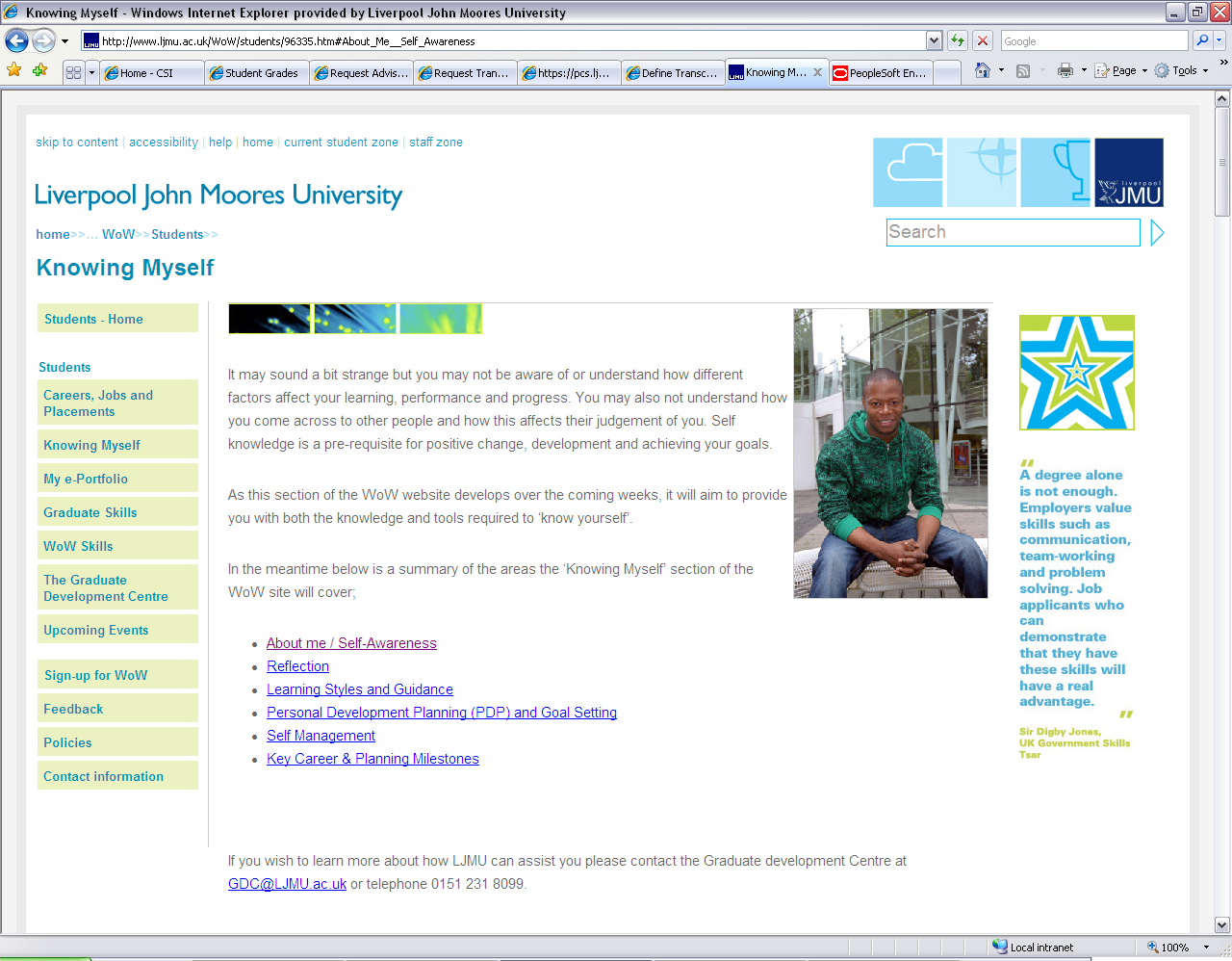
**[](https://www.google.co.uk/url?sa=i&rct=j&q=&esrc=s&source=images&cd=&cad=rja&uact=8&ved=0ahUKEwjZuerSu4nXAhWGchQKHbT9CwIQjRwIBw&url=https://www.eventbrite.co.uk/o/liverpool-john-moores-university-roscoe-lectures-3233158788&psig=AOvVaw2rEDE_dQz3fMXV7J1A9n9g&ust=1508941556822069)Process Document**

**CRM – Student Advice & Wellbeing**

Liverpool John Moores University

**CRM Activities: Add Task/Reminder**

Version 0.2, October 2018

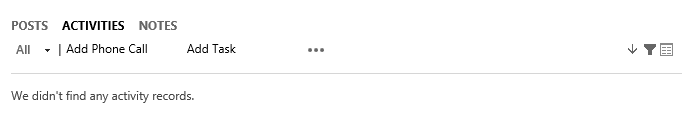
Author: DS Business Support Team

You may wish to add a Task to include any actions taken on the case, off line. You are also able to set a due date and time on a Task so that the system will prompt you and the Task will act as a Reminder.

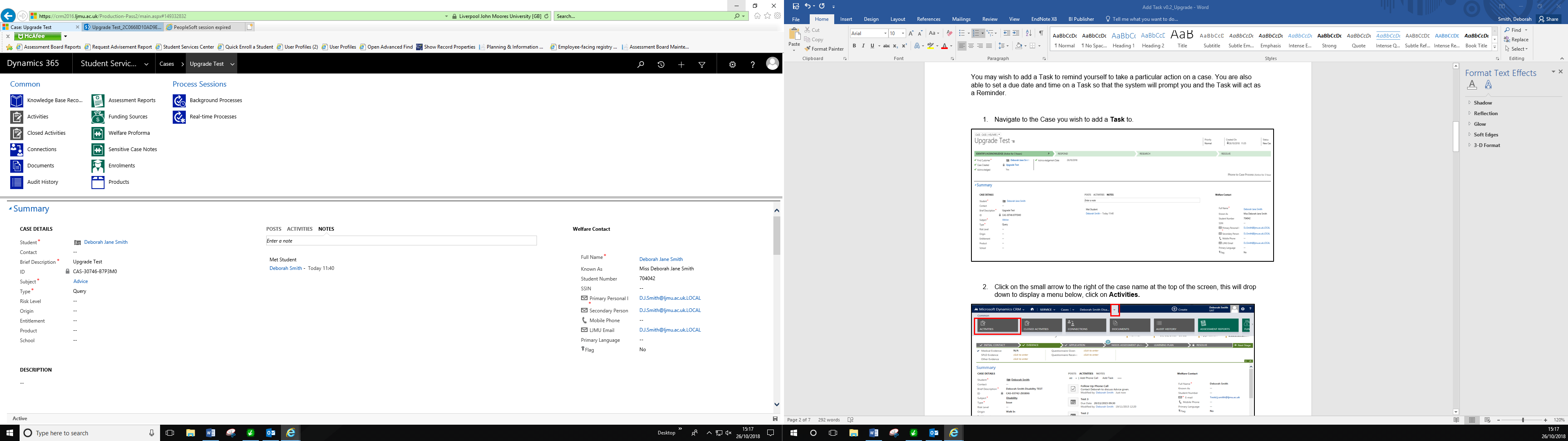
1. Navigate to the Case you wish to add a **Task** to.



1. Click on ‘Activities’
2. **Click on the small square box**

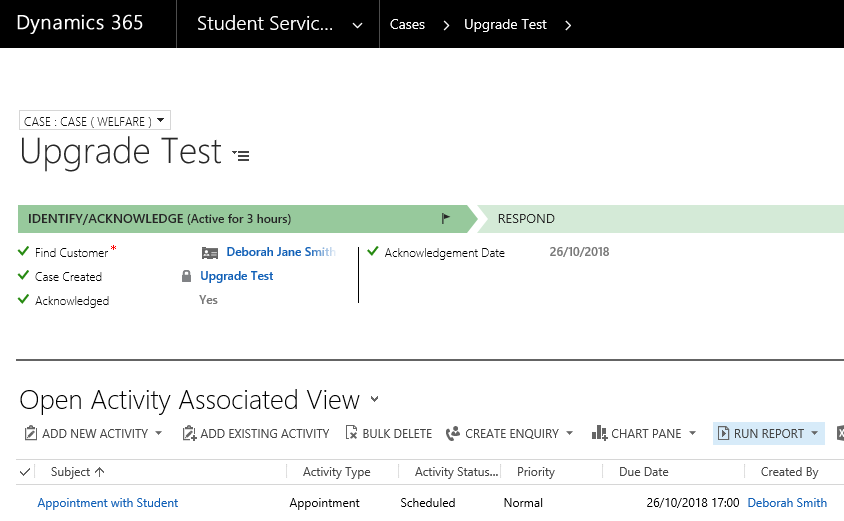


1. Click on the small arrow to the right of the case name at the top of the screen, this will drop down to display a menu below, click on **Activities.**

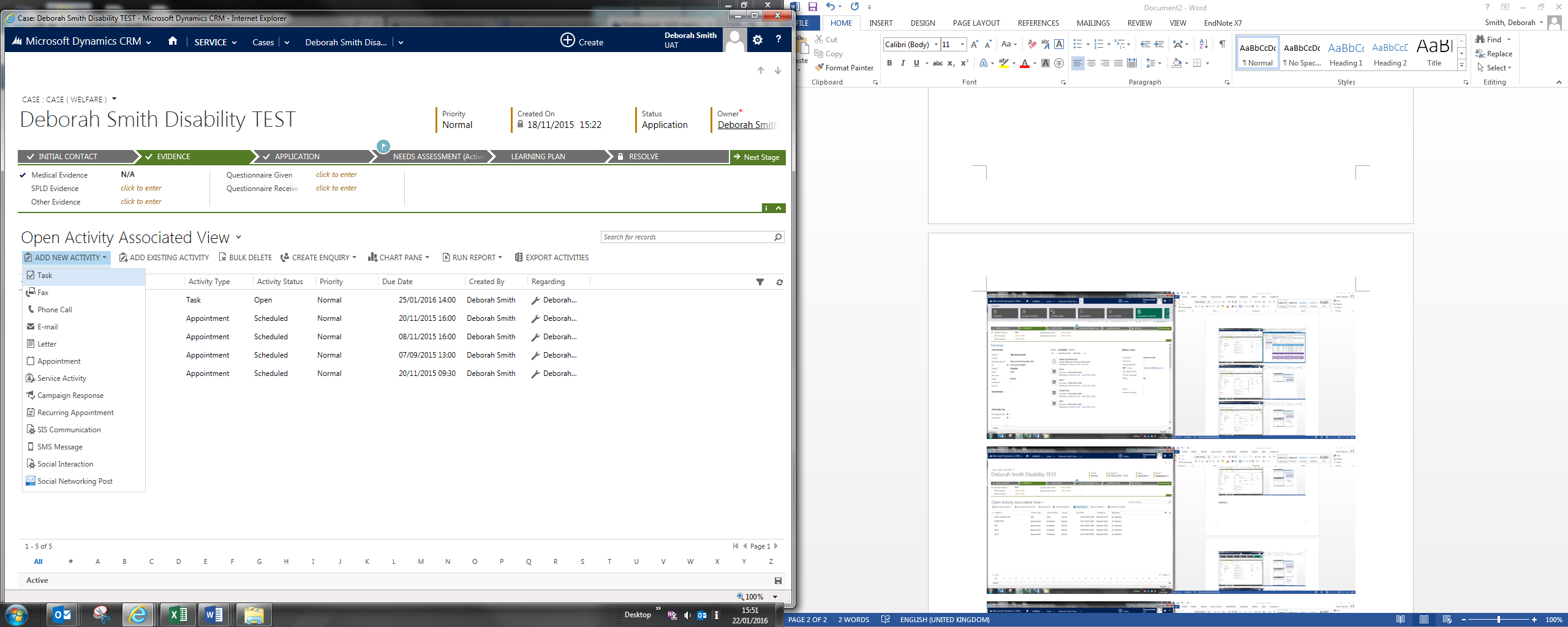


The **Open Activity Associated View** will open.

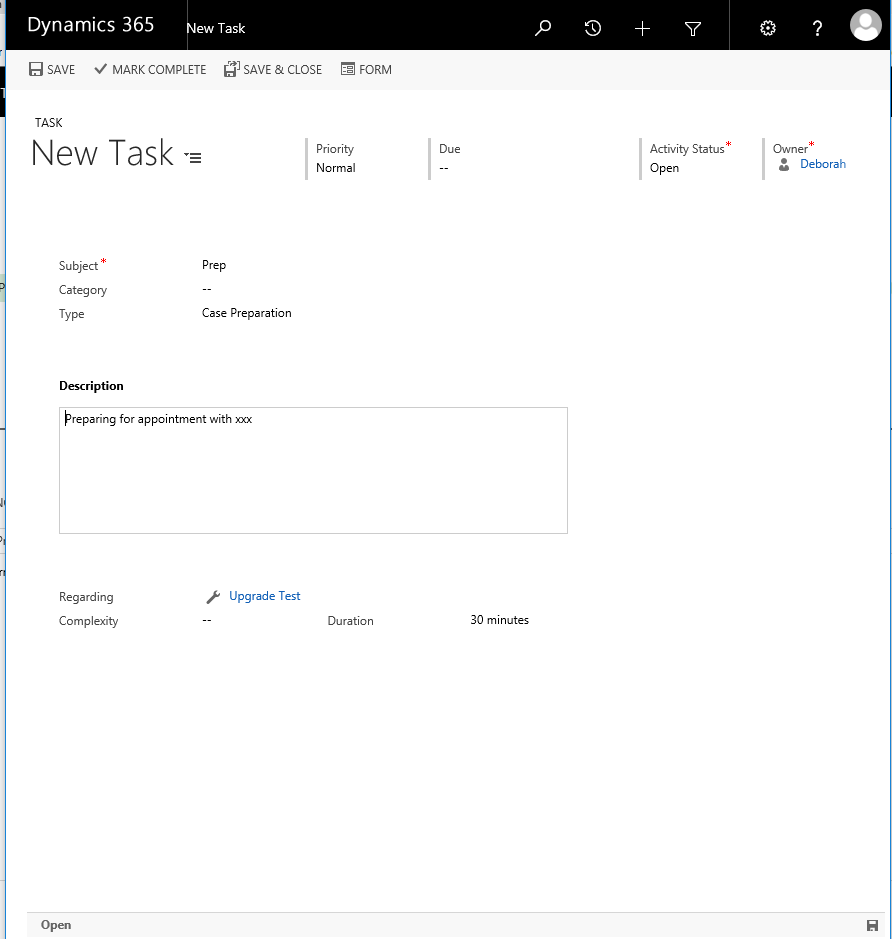
1. Click on to ‘**Add New Activity’**.



1. Next, select **‘Task’** from the drop down menu which appears.



1. The ‘**New Task’** window will pop up.



1. The **‘Subject’** field is a Mandatory, and Free Text field.
2. The **‘Type’** will default to **‘Case Preparation’.** You can also select ‘**Case Administration’.**
3. You may also wish to add a **Description** of the Task.
4. Next, you need to record the **Duration.**
5. Click into the **Duration** field and delete the time in the box, which will have defaulted to 30 minutes.

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1. Next, entered the desired amount of time



1. Click **Save in the top left corner.**
2. To go back to the Case view, click on the blue link where it says ‘Regarding’ A case will always have a ‘spanner icon’ prefixing it.



1. You will return to the **Case** view.
2. You can see the Task has been entered in the middle column.

**Please Note: ALL Activities, including Tasks must be marked ‘Complete’ before a case can be resolved.**

