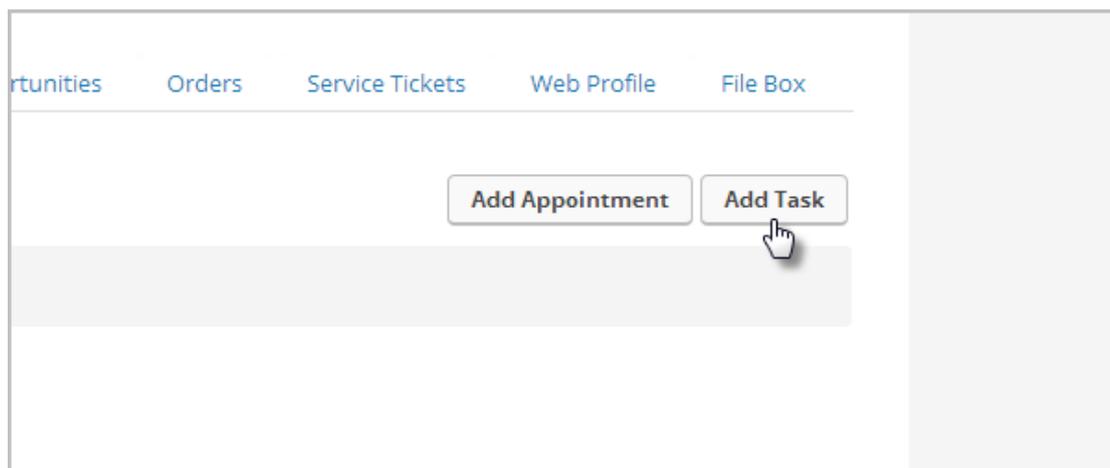


Create a task or appointment while viewing the contact record

You can create tasks or appointments from a contact record or from [My Day](#) . When you use the My Day calendar, you'll be able to coordinate tasks or appointments with your overall schedule. When you create tasks or appointments on a contact record, Infusionsoft will not alert you to existing of tasks or appointments or prevent double-booking.

1. While on a contact record, click on the **Add Appointment** or **Add Task** button.
 - a. **Add Task:** will create a "to do" item on your calendar. You can assign a date and time, but cannot block out a window of time on your calendar for a task. **Note:** Tasks have a start date, but the end date is not recorded until the task is complete.
 - b. **Add Appointment:** to block out a specific period of time and/or to record a firm commitment. **Note:** Appointments have a Start date, End date, and time.



2. Fill in the task or appointment details:
 - a. **Linked Information:** The task or appointment will automatically be linked to the contact record you are in. Click on the Select a different contact link to link it to a different person. **Note:** that it will only be linked to one contact. If you need to link it to multiple contacts, you must create multiple tasks/appointments.
 - b. **Task / Appointment Information:** Enter the event details. **Note** that your date/time entry will specify when it shows up on the user's calendar.
 - c. **Advanced Info:** Assign an Action Type and Priority. The priority helps you identify which tasks are most critical so you can work on them first.
 - d. **Notifications:** Click on one or more users to send them an email notification when this task is created. Set a pop-up reminder to trigger before the appointment. The pop-up reminder displays when the user is logged into

Infusionsoft.

Add an Appointment

Information Recurring Test Tab

Linked Information **a**

Contact Luke Gil (Select a different contact...)
lukegil0506@gmail.com
(402) 733-9581

Appointment Information **b**

Action Description

Appt Date 10-03-2018 06:30 PM

Appt End 10-03-2018 07:00 PM

Creation Notes

User Alwayshelpful Support

Advanced Info **c**

Action Type Please select an action type

Priority 3. Non-Essential

Notifications **d**

Notify None
Alwayshelpful Support
Amanda Madsen
Geraldine Vaughn
Mathew Magwood
Rose InFuTest

Send notify as BCC

Remind Time Please select a remind time before appointment

Add a Task

Information Recurring Test Tab

Linked Information **a**

Contact Luke Gil (Select a different contact...)
lukegil0506@gmail.com
(402) 733-9581

Task Information **b**

Action Description

Action Date 10-03-2018 06:30 PM

Completion Date

Creation Notes

User Alwayshelpful Support

Advanced Info **c**

Action Type Please select an action type

Priority 3. Non-Essential

Start Date

Notifications **d**

Notify Immediately None
Alwayshelpful Support
Amanda Madsen
Geraldine Vaughn
Mathew Magwood
Rose InFuTest

Send individual notifications

Pop Up Reminder Please select a pop up remind before due date

3. Click the **Save** button to save the task or appointment to the calendar and/or task list.

