## 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.
  - 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.

rtunities	Orders	Service Tickets	Web Profile	File Box
		Ac	ld Appointment	Add Task رالم
				U

- 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.

Information	Recurring Test Tab		
inked Information	ona	Advanced Info	С
Contact	Luke Gil (Select a different contact)	Action Type	Please select an action type 🔻
	lukegili0506@gmail.com	Priority	3. Non-Essential
	(402) 733-9581		
ppointment Info	ormation b	Notifications	d
ction Description		Notify	None *
Appt Date	40.02.2010 B 06:20 DM	4	Amanda Madsen Geraldine Vaughn Mathew Magwood
Appt Date	10-03-2018 06.30 PM	N	
Appt End	10-03-2018 07:00 PM *	h	tose in-ulest
Creation Notes			
		6	Send notify as BCC
		Remind Time	Please select a remind time v before appointment
dd a Task			
dd a Task	Recurring Test Tab		
Add a Task	Recurring Test Tob	Advanced Info	C
Add a Task	Recurring Test Tab tion a	Advanced Info	C De Please select an action type
Add a Task Information inked Informa	Recurring Test Tab tion a ttion a ttion a tuke Gil (Select a different contact) lukegill0506@gmail.com	Advanced Info Action Typ Priori	C Please select an action type • Ity 3. Non-Essential •
Add a Task	Recurring Test Tab tion a ttion a tube Gil (Select a different contact) lukegill0506@gmail.com (402) 733-9581	Advanced Info Action Typ Priori Start Da	C Please select an action type Ity 3. Non-Essential te
Add a Task	Recurring Test Tab tion a ct Luke Gil (Select a different contact) lukegill0506@gmail.com (402) 733-9581	Advanced Info Action Typ Priori Start Da	C Please select an action type Ity 3. Non-Essential te I
Add a Task Information inked Informa Contac	Recurring Test Tab tion a ct Luke Gil (Select a different contact) lukegill0506@gmail.com (402) 733-9581 b	Advanced Info Action Typ Priori Start Da Notifications	C Please select an action type Ity 3. Non-Essential te Ity a
Add a Task	Recurring Test Tab tion a ct Luke Gil (Select a different contact) lukegill0506@gmail.com (402) 733-9581 b f lukegill0.03-2018	Advanced Info Action Typ Priori Start Da Notifications Notify Immediate	C Please select an action type • Ity 3. Non-Essential • te d d ty None Alwayshelpful Support
Add a Task Information inked Informa Contac Fask Information Action Description Action Dat	Recurring Test Tob tion a ct Luke Gil (Select a different contact) lukegill0506@gmail.com (402) 733-9581 on b 10-03-2018 0 06:30 PM •	Advanced Info Action Typ Priori Start Da Notifications Notify Immediate	C Please select an action type  Jacobia Select an action type
Add a Task Information Linked Informa Contac Task Information Action Descriptio Action Dat	Recurring     Test Tab       tion     a       ct     Luke Gil (Select a different contact)       lukegill0506@gmail.com       (402) 733-9581       on       b       in       in       ie       iii	Advanced Info Action Typ Priori Start Da Notifications Notify Immediate	C Please select an action type Ity 3. Non-Essential te d d d d v None Alwayshelpful Support Amanda Madsen Geraldine Vaughn Mathew Magwood
Add a Task Information Linked Informa Contact Task Information Action Description Action Dat Completion Dat Creation Note	Recurring Test Tab tion a tion a tion a tion a to a different contact) lukegill0506@gmail.com (402) 733-9581 to b tion te a a a a a a a a a a a a a a a a a a a	Advanced Info Action Typ Priori Start Da Notifications Notify Immediate	C Please select an action type 3. Non-Essential te d d v None Alwayshelpful Support Alwayshelpful Support Amanda Madsen Geraldine Vaughn Mathew Magwood Rose InFuTest
Add a Task Information Linked Informa Contac Task Informatic Action Descriptio Action Dat Completion Dat Creation Note	Recurring Test Tab tion a tion b tion	Advanced Info Action Typ Priori Start Da Notifications Notify Immediate	C Please select an action type  3. Non-Essential  d  V None Alwayshelpful Support Amanda Madsen Geraldine Vaughn Mathew Magwood Rose InFuTest
Add a Task Information Linked Informa Contact Task Informatic Action Descriptio Action Dat Completion Dat Creation Note	Recurring Test Tob tion a tion a tuke Gil (Select a different contact) lukegill0506@gmail.com (402) 733-9581 b tuke Gil (Select a different contact) lukegill0506@gmail.com (402) 733-9581 tukegill0506@gmail.com (402) 733-9581 tukegill0500 tukegill050	Advanced Info Action Typ Priori Start Da Notifications Notify Immediate	C Please select an action type Ity 3. Non-Essential I Ite I I I I I I I I I I I I I I I I I
Add a Task Information inked Informa Contac Fask Information Action Description Action Dat Completion Dat Creation Note	Recurring Test Tab tion a tion a tion a tion a tuke Gil (Select a different contact) lukegill0506@gmail.com (402) 733-9581 tuke Gil (506@gmail.com (402) 733-9581 tuke Gil (500 PM tuke Gil	Advanced Info Action Typ Priori Start Da Notifications Notify Immediate	C Please select an action type  3. Non-Essential  3. Non-Essential  4 V None Alwayshelpful Support Amanda Madsen Geraldine Vaughn Mathew Magwood Rose InFuTest  Send Individual notifications

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