Manage tasks and appointments with My Day

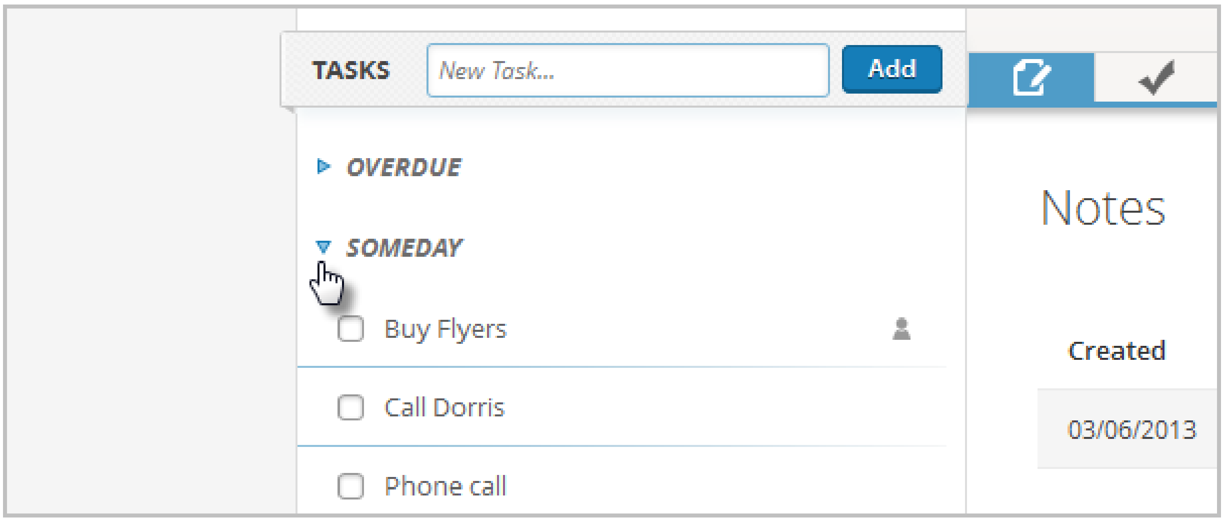
The My Day page consolidates tasks and appointments onto one page. With My Day, you can focus on one area of Infusionsoft to perform your daily activities instead of jumping around to various pages in Infusionsoft. The left panel contains tasks and appointments. The large panel to the right shows you the details of the tasks and appointments you select from the left.

Manage Tasks

The Task Panel shows up to 250 tasks assigned to you. Tasks are ordered by the due date, then priority, and organized into one of these four groups:

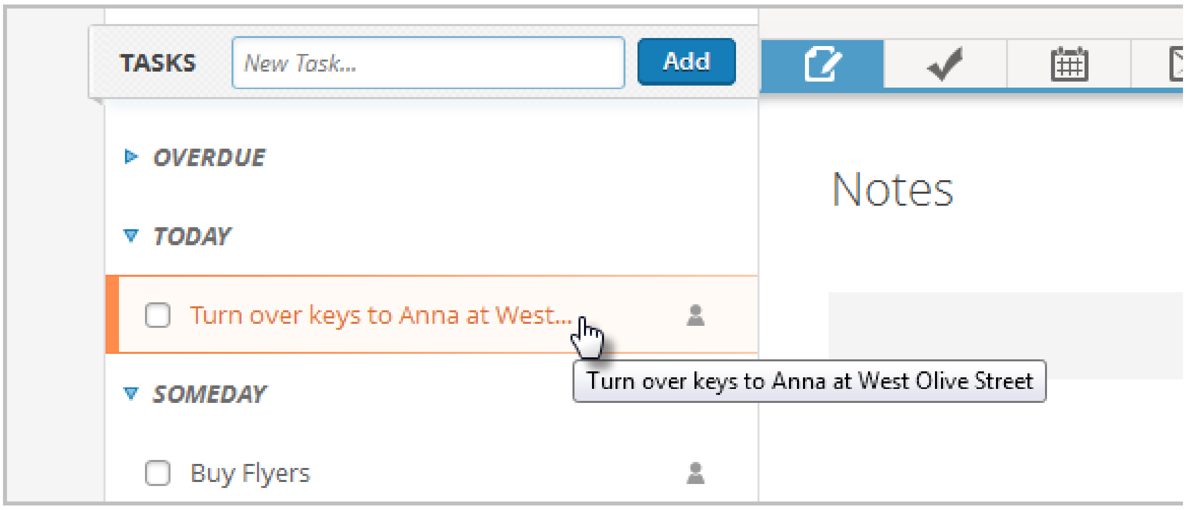
- **Overdue** - Tasks that are past due
- **Today** - Tasks that are due today
- **Tomorrow** - Tasks that are due tomorrow
- **Someday** - Tasks that have not been assigned a due date

Each of these groups can be collapsed or expanded by clicking on the group name.

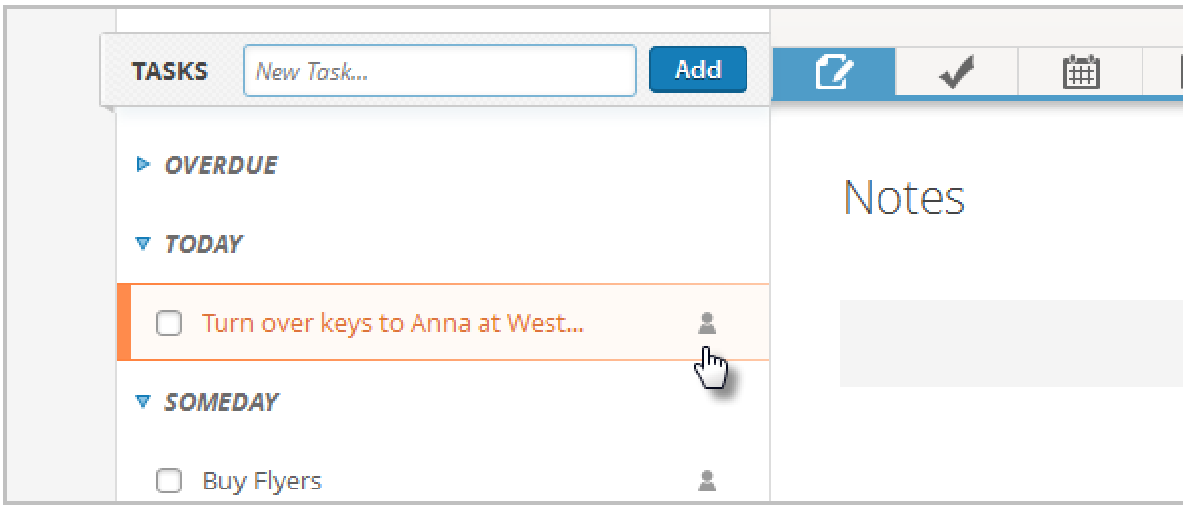


Please Note! This state is not saved. When you leave My Day and come back, the groups will reset to all groups expanded. If there are no tasks in the group, the group name will be hidden. If there are over 250 tasks in your tasks panel, all other tasks will transfer to the All Tasks view.You will be alerted that you have exceeded the 250 display limit. You may click the All Tasks button to see these tasks.

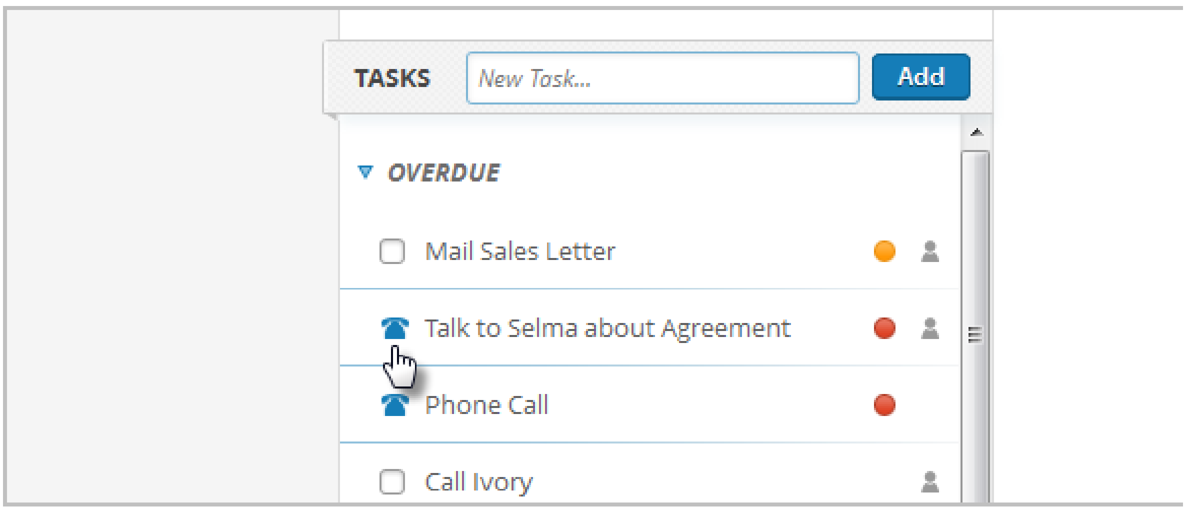
- **Task Title** - If your task title is too long, just hover over the task to reveal the full title.



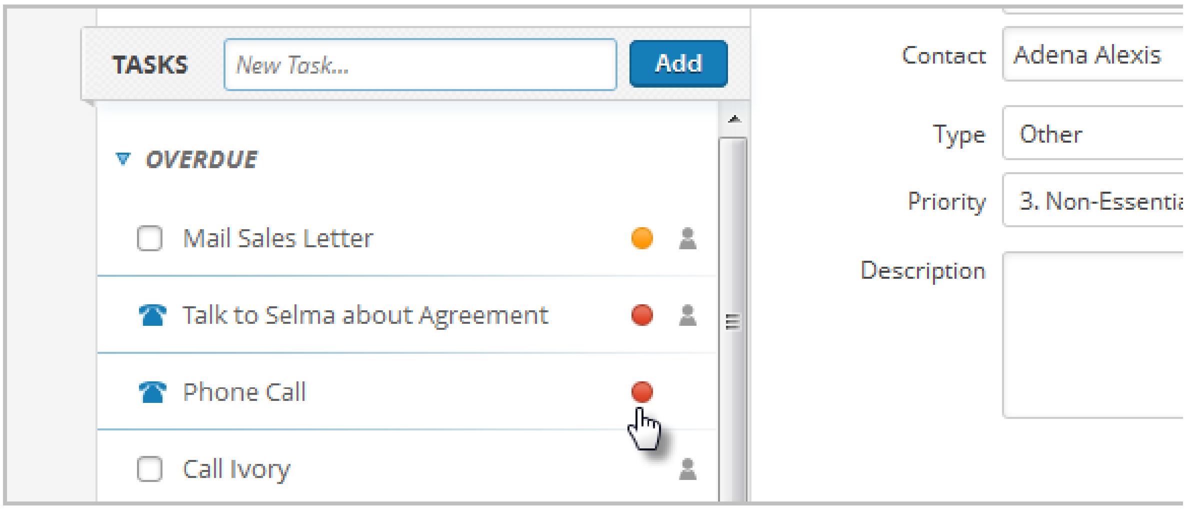
- **Due Date** - The Due Date represents the date the task is due
- **Contact Association** - If the task is associated with a contact record, a person icon will appear on the task



- **Task Type** - Can be Email, Call, Appointment, Letter or Other.

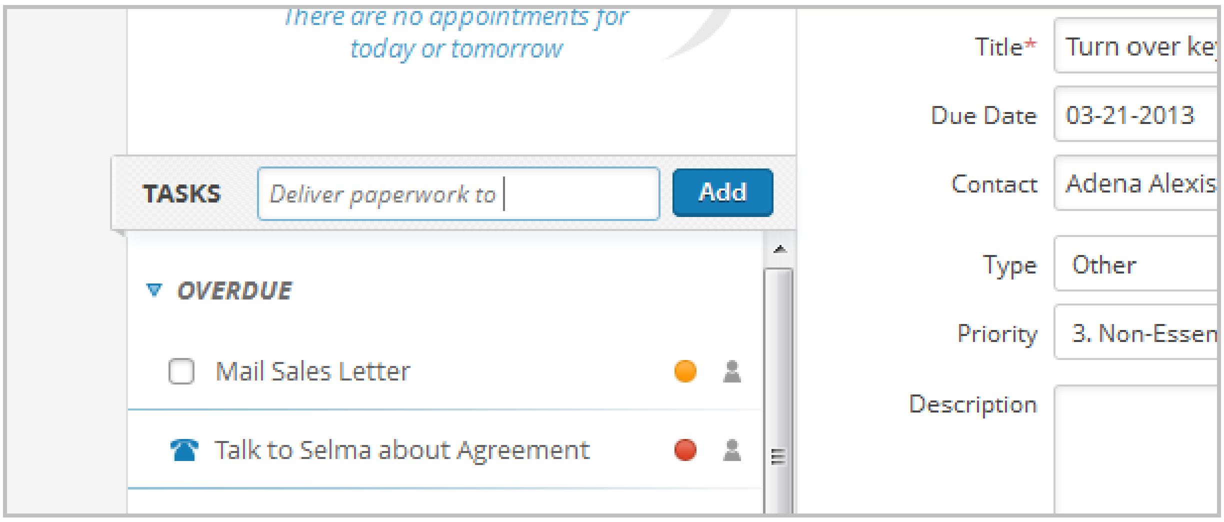


- **Priority Icon** - The priority icon only displays if you specify a priority on a task. Priorities have been migrated to the new task data model, and are represented as colored dots that represent the severity of the priority. Red = Critical, Orange = Essential and No Icon = Non-Essential.



Adding a Task

To add a task, type the title of the task into the *New Task* field and hit **Enter** on your keyboard (or click the **Add** button on the page.) Newly created tasks appear below the *New Task* field and above the task groups. These new tasks include the task title and a delete icon (allowing you to quickly remove a new task.)

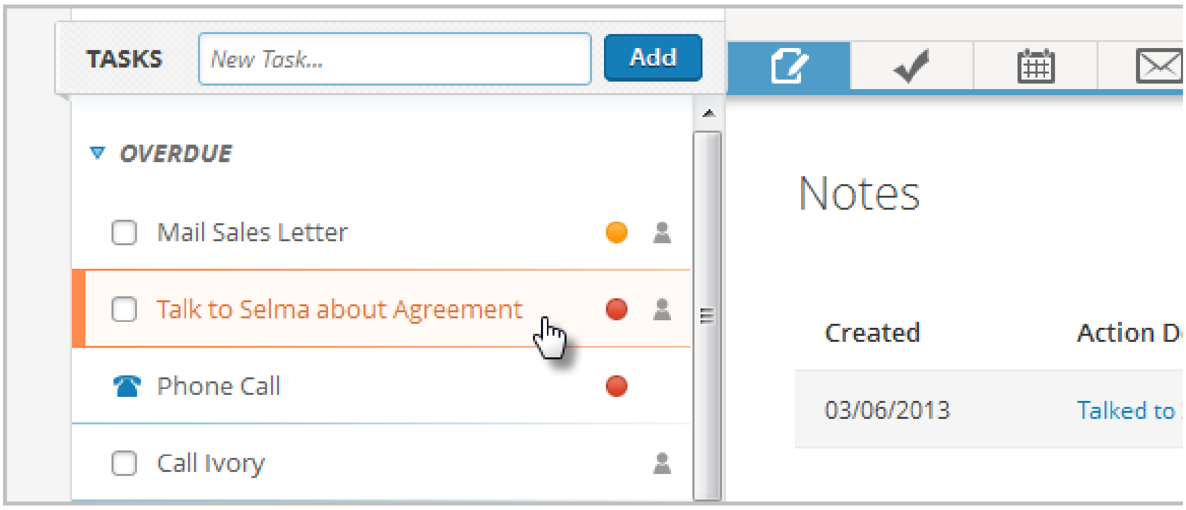


When the task is created, it is automatically selected and displayed in your *Working View*. Here, additional details can be added to the task:

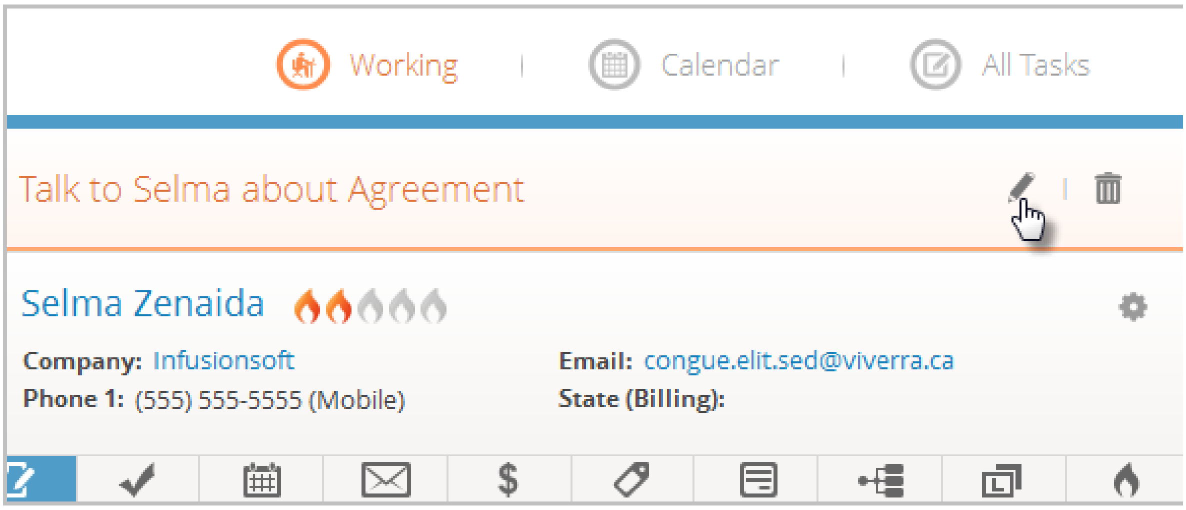
- Due Date
- Contact
- Task Type
- Priority
- Description

Edit a Task

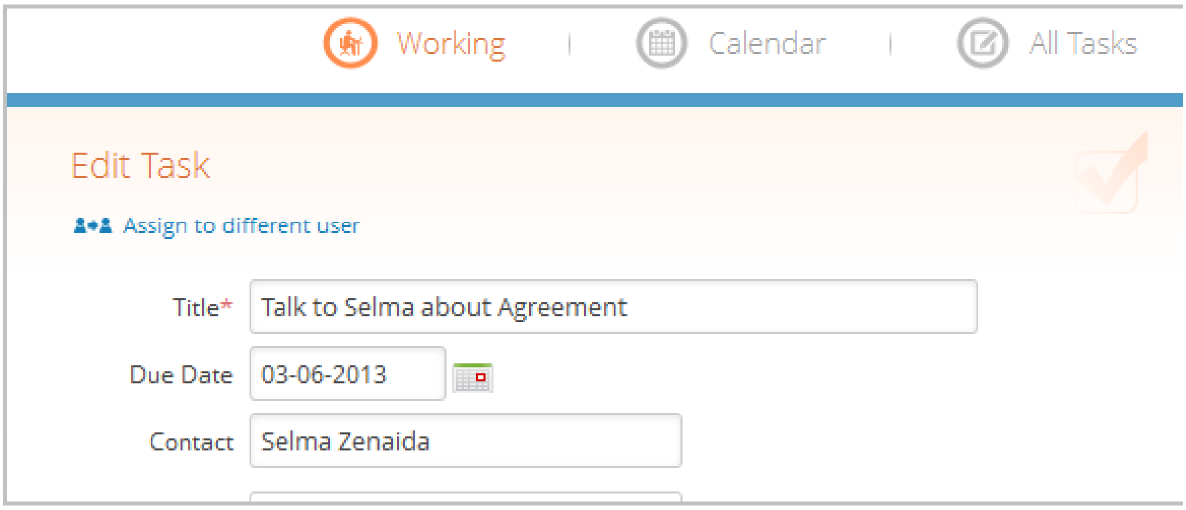
1. To edit a task in the working panel, click on a task in the left panel to select it.



2. The task details will appear in the right hand panel, along with icons for **Edit** and **Delete**. Click the **Edit** icon in the right hand panel to bring up the edit task screen.



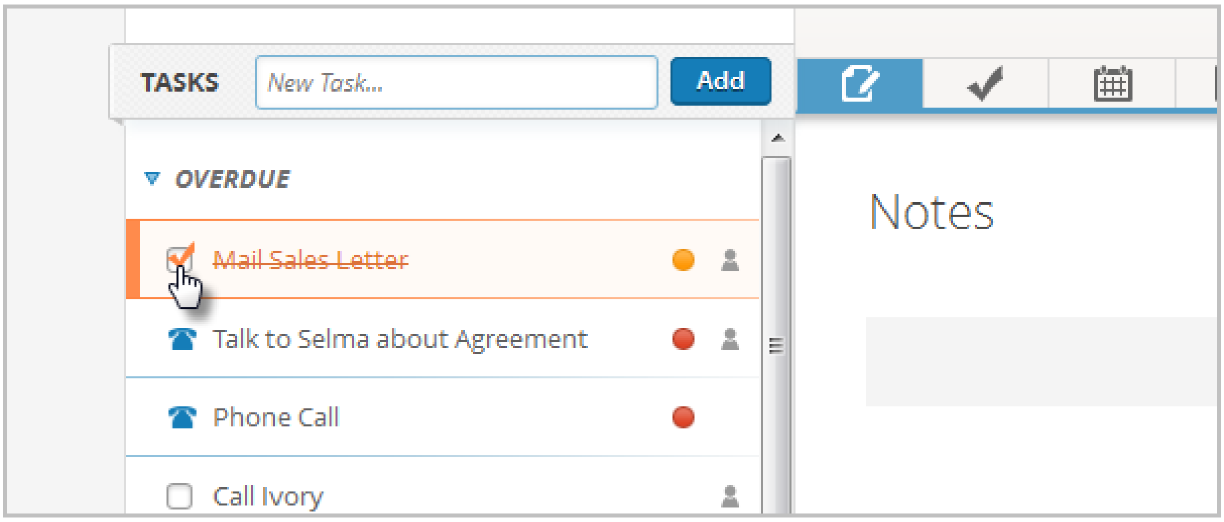
3. The edit screen is the same as the creation screen.



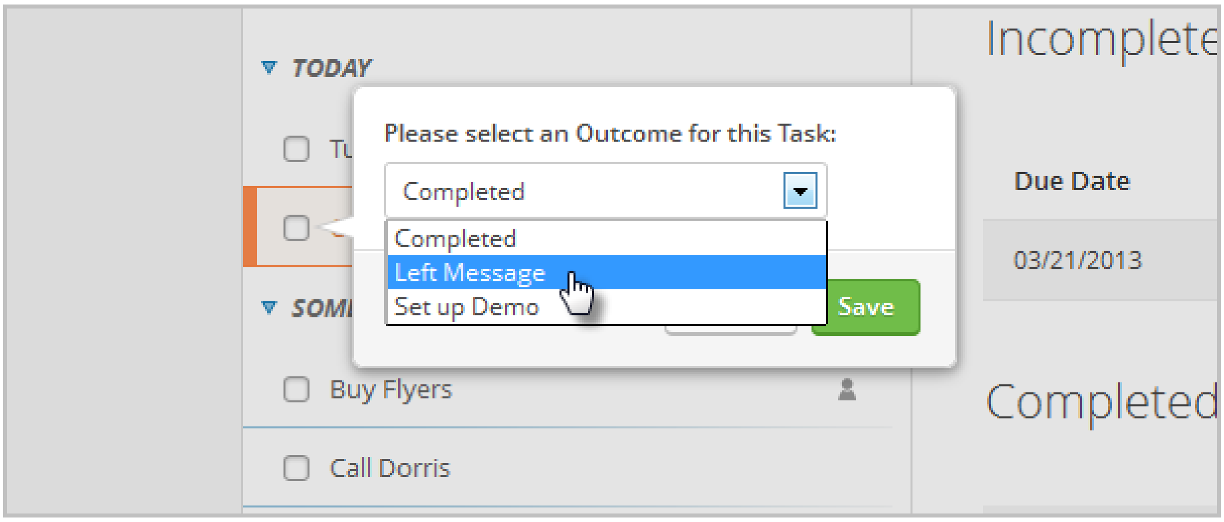
Once a task has been edited and saved, the task remains selected in the list and the right panel displays the task details. If the due date has been changed, and the task no longer falls into the display criteria for the *working* tab, then the right panel will return to the default *blank* view.

Completing a Task

To complete a task from the *Working* tab, simply click on the check mark next to the task title. The task will be struck through. The completed task will be removed from the *Working* tab and archived in the Task Note Report under **Admin** > **Reports**.



For tasks that have legacy completion scenarios (outcomes) that trigger automation, a modal with scenario options is presented to you when the checkbox is clicked. You must choose a scenario and click **Save** to complete the task.



Once a task has been completed, the task details are presented in a *read only* state, and cannot be deleted or edited. If there is a contact associated with the task, and the contact record is showing, you will still be able to perform actions on the business card's action pane.

Manage Appointments

The Appointments panel on the My Day page displays your appointments for today and tomorrow. Each appointment includes:

- **Appointment Title** (Character limited to one line. If the title needs to extend beyond one line, it is shortened with ellipses. On mouse-over, a tool-tip will appear with the entire appointment title.)
- **Start Time & End Time**
- **Location** (only displays if you specify the location.)
- **Attendee** (only one attendee can be attached to an appointment.)

The Appointment panel allows up to three appointments to be viewable at one time. If there are more than three appointments between today and tomorrow, a scroll bar will appear, allowing you to scroll in the appointments panel. There is no limit to the number of appointments that can display in this panel.

Please Note

The panel's height is responsive based on your resolution.

- Height = 768 px or lower: One Appointment will appear at a time
- Height = 800 px: Two Appointments will appear at a time
- Height = 960 px or higher: Three Appointments will appear at a time

Appointments consist of the following elements:

- **Title** - The Title is required
- **Contact** (optional) - If the appointment is tied to a contact record, start typing the name of the person and choose the person from the drop-down list.
- **Location** (optional) - Enter in the name of the location of the appointment.
- **Start Date/Time**
- **End Date/Time**
- **Description** - Optional details that you can enter.