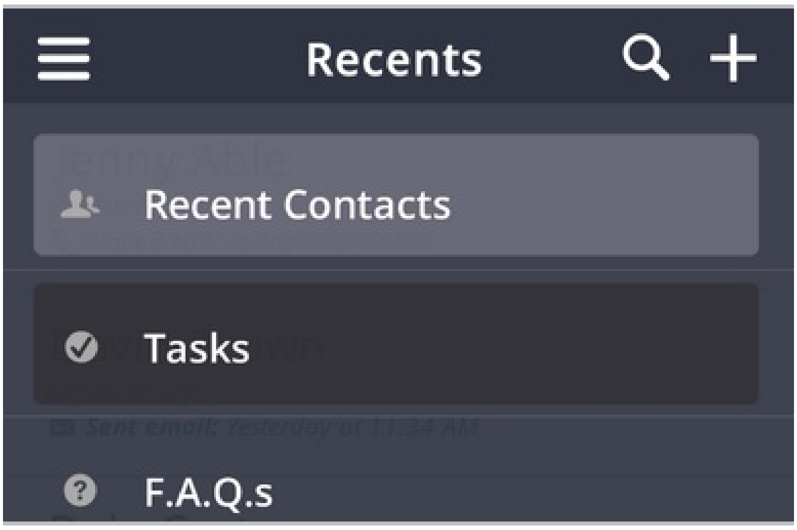
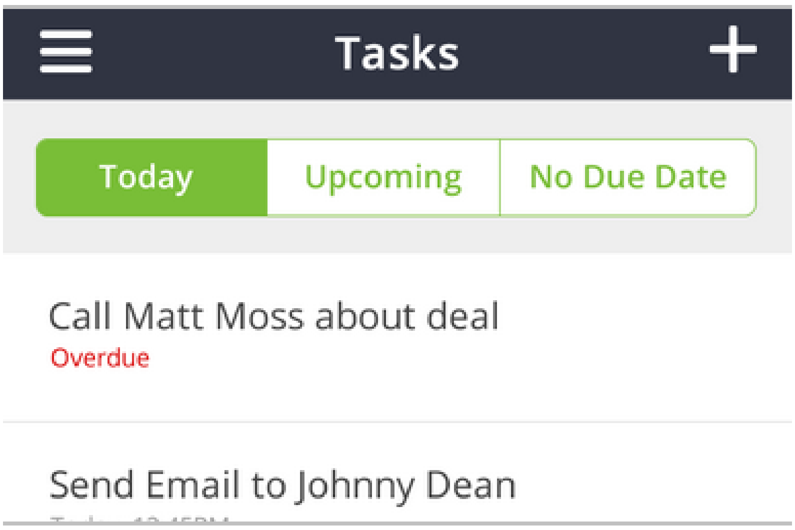
Infusionsoft Mobile Tasks

1. Expand the menu and tap **Tasks**

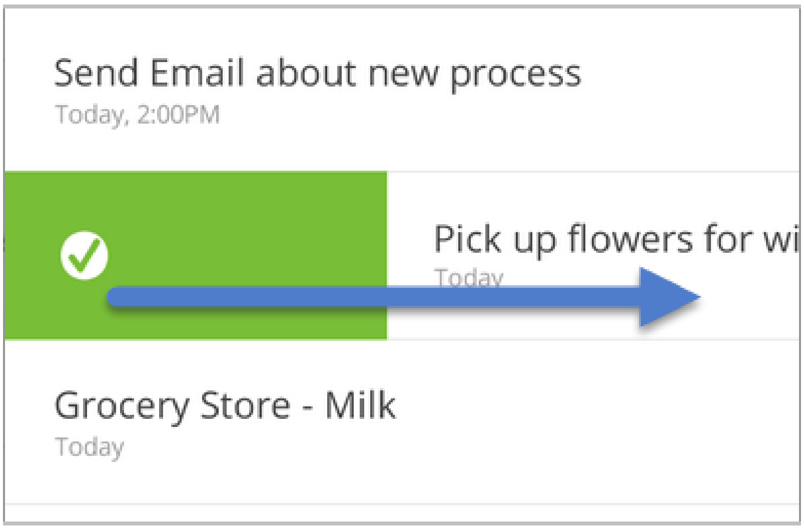


2. Click on a task to view the Task List screen.

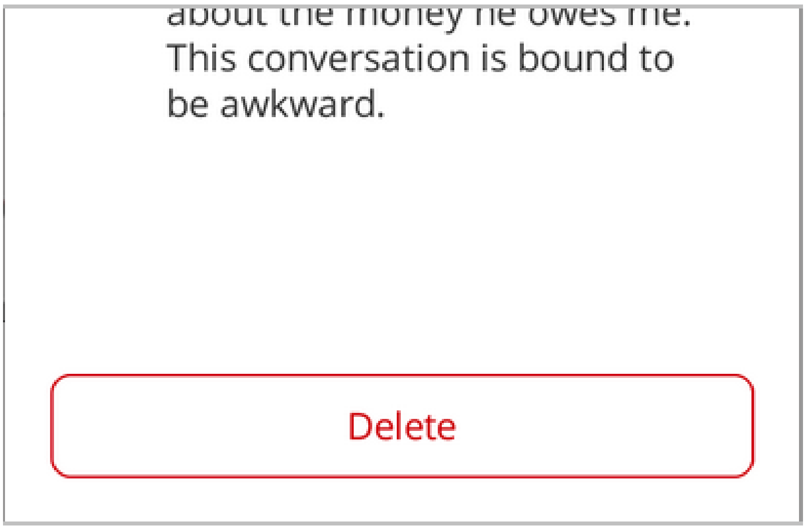


   - **Today** contains overdue tasks and tasks due today.
   - **Upcoming** contains tasks with due dates in the future.
   - **No Due Date** contains tasks with no due date.

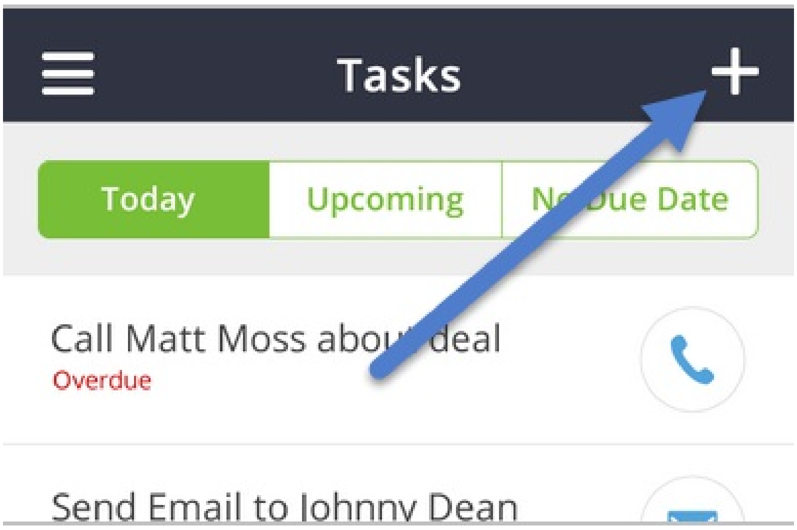
3. To complete a task, swipe from left to right while on the List screen. You will be prompted to **Undo** if you swiped the task erroneously. Note: Once a task is complete, any campaign automation tied to that task will trigger at this time.



4. To delete a task, tap the task to see the details, and tap the **Delete** button.



5. To add a task, tap the "plus" icon in the Task List view



As you start adding task details, more task options will become available:

- You can tap due date to select a date from the native date picker that slides up.
- You can tap "Add Contact" to search for a contact and select one to associate to that task.
- You can tap the **Description** field to start entering text in that field. The whole screen scrolls up as the body of text text lengthens.
- When you tap Save, the task is added to the appropriate list based on due date and you can see a "Task successfully created" card at the bottom of the screen.

6. To edit a task, you can tap the edit "pencil", or on any of the fields while viewing the task