

# MDprospects™ Tasks Page Enhancements

## 1 Multi-Select User Filtering

View multiple users' tasks at once.

## 2 List Views

See task lists filtered by day, week, month or year.

## 3 Filter By Status

Filter tasks by completed, all, or active status.

Task Calendar | Future Tasks | Old Tasks | Completed Tasks | Automated Tasks | Tasks History

Michael Sloan | Taylor Slentz | \*adminNicole

Completed | All | Active

Month | Week | Day | List Day | List Week | List Month | List Year

October 2023

Mon	Tue	Wed	Thu	Fri	Sat	Sun
25	26	27	28	29	30	1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29

## 4 Sub-Page Filtering

Filter any sub-page by prospect, user name, or task message.

## 5 Improved Task Details Display

View time due and task details from calendar.

Task Calendar | Future Tasks | Old Tasks | Completed Tasks | Automated Tasks | Tasks History

FROM DATE: 10/26/2023 TO DATE: 11/26/2023

FILTER BY: Select Field

RESET FILTER

# MDprospects™ Tasks Scheduling Enhancements

## 1 Schedule From Calendar

Schedule tasks directly from the calendar by clicking on a date.

## 2 Set Task Priority

Mark a task as urgent, high, medium or low.

## 3 Adjust Task Color

Customize background and text colors of tasks, or use the defaults associated with priority.

The screenshot shows the 'Add New Task' form with the following fields and callouts:

- Priority & Color:** A dropdown menu set to 'standard', a 'Text color' button, a background color input field with '#6262b3', and a text color input field with '#ffffff'. A red arrow points from the 'Set Task Priority' callout to the 'standard' dropdown.
- Select User:** A list of users including '\*adminNicole', '\*Admin MDprospects-alexeyecare', 'ASCERS', and 'devtestAEC'. A red arrow points from the 'Adjust Task Color' callout to the 'Text color' button.
- Send E-mail:** A checkbox that is currently unchecked.
- Date Time:** A dropdown menu set to 'Scheduled', a date input field with '10/27/2023', and dropdown menus for 'Hour', 'Minute', and 'EST'. A red arrow points from the 'Schedule From Calendar' callout to the 'Scheduled' dropdown.
- Message:** A large text area for entering the task message.
- File:** A 'Choose File' button and the text 'No file chosen'. A red arrow points from the 'Attach a File' callout to the 'Choose File' button.
- Footer:** A green 'Add task' button.

## 4 Attach a File

Attach any files you may need to associate with tasks so they are handy when needed.

## 5 General Tasks

Tasks no longer need to be associated with a prospect.