

Adding Tasks and Alerts

A task is a reminder or an item of work that can be assigned to *os-soft* users. Assigned tasks are visible on the Advocate Task List and can include a due date, description, and a reminder that will pop-up at a specified time.

Tasks can be associated with clients and include a category and status to allow for quick recognition of completion. Task Alerts can be set with a reminder that will pop-up when the software is open on the specified user's screen at the designated time. Alerts can be snoozed or dismissed by the user. You can also assign task alerts to multiple staff members.

To create a new Advocate Task List item:

1. Select Advocate Task List from the main menu.



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 On the Advocate Task List tab, select New from the Home ribbon, then choose Advocate Task



3. Complete the task details to create the Advocate Task.

😬 Welcome	🝸 Advocate Task List 🛛 📓 Task Alert 🖉 Advocate Task 🗙							
Advocate Task								
Client:	Kyle, Sellena 🗶 🤘	☆ ☐ Task Details						
Staff Member:	Office Manager X 🗸							
Date Assigned:	10/18/2017 🔹							
Due Date:	10/27/2017 🔹							
Task Categoy:	Follow up with client X 🔹							
Staus:	In Progress 🗙 👻							

4. Save and Close the tab.

To create a new Task Alert:

Creating a Task Alert can be done from the Advocate Task List or the Task Alert list.

- 1. Select Advocate Task List or Task Alert List from the main menu.
- 2. Click on New in the Home ribbon and select Task Alert.
- 3. Complete the Task Alert details including setting a reminder if desired.

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4. Select any staff members to associate with the task reminder.

Welcome	Advocate	Task List	🙆 Task Alert	Advocate Ta	sk 🛛 🙆 Task Alert	x								
Subject:	Check in with Selle	ena						Alarm Tim	e: 10/17/2017 8:00 P	м				+
Task Date:	10/18/2017 12:00	AM						Object Nam	2:					
Reminder Time:	4 hours						,							
								-						Description:
														*
														Ŧ
🔹 🕹 Staff	Members													
🕴 🐻 Add	🔓 Remove 📗	5 0 0	🔒 Unlock Acc	count Filter All It	tems	- 📄 Expo	ort to 🔻 😡 Print	Preview 🖕						
User Na	me						A 1	Volunteer	First Name	Last Name	Allow Edit O	Allow Bulk Add	Staff Paper ID	Update Permissions
Administ	rator								Administrator					Allow check and install
> omanage	er								Office	Manager			101	None
U														

- 5. Save and Close
- 6. The user associated with the task reminder will receive a notification pop-up in ossoft once the time set for the reminder has passed.

🔔 1 Reminder(s)		ΞX
Subject	Alarm	Object
Check in with Sellena	10/15/2	
Course Hines E minutes		
shooze time: s minutes		
Show Notifications Window Snooze Dismiss	Open Obj	ect Notification

7. The user can Dismiss or Snooze the alert.