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General Tasks

HELPFUL HINTS



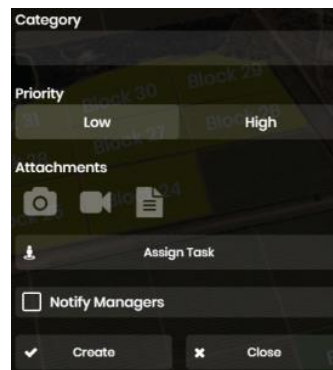
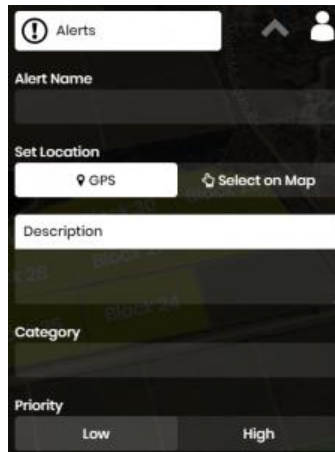
ALERTS

To add an 'Alert,' start by clicking on the black 'General Tasks' tab at the bottom of your screen and select the 'Alerts' tab.



1) Click 'Add Alert' to enter a new alert into general tasks.

2) An information box will be added to enter all the alert details needed.



3) Start by adding an 'Alert Name,' then select the location via 'GPS' or 'Selecting on the Map.'

4) Add a description if you want more information.

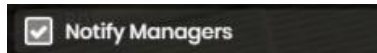
5) Select or add your own category and set the level of priority for the alert.

6) Include 'Images,' 'Videos,' and/or 'Documents' if you want to add more in-depth information for the alert.

7) The option is also available to 'Assign Task' to a certain employee and to send a notification to the manager.

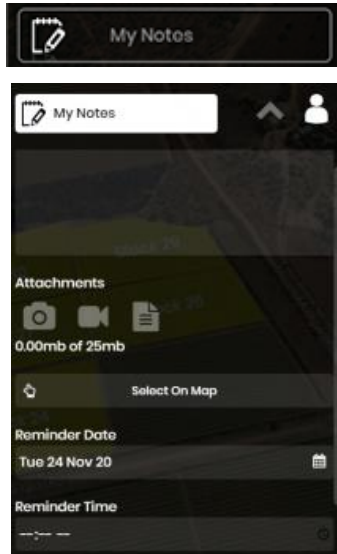


8) Once all the information has been added click 'Create' and the alert will be made



MY NOTES

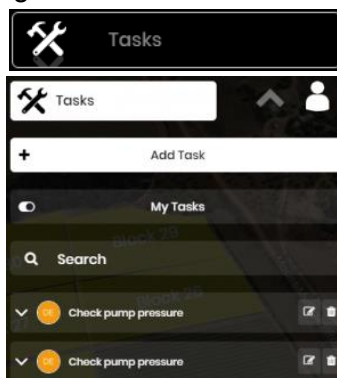
To add a note to your 'My Notes,' start by clicking on the black 'General Tasks' tab at the bottom of your screen and select the 'My Notes' tab.



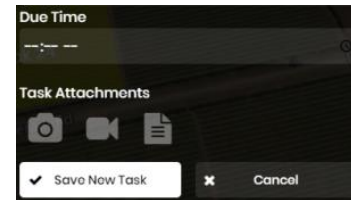
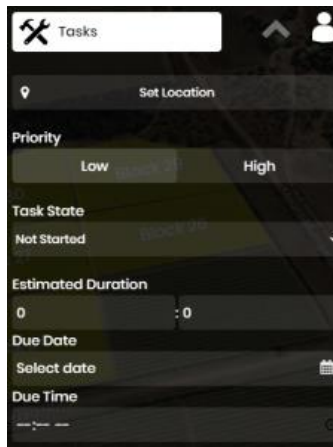
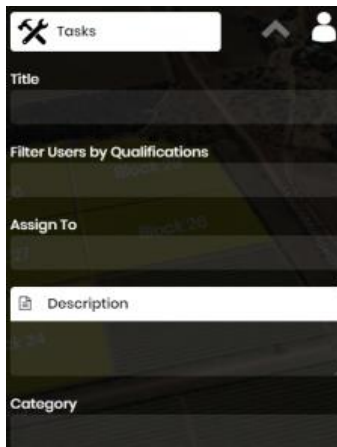
- 1) Search for pre-filled notes by using the search bar or by selecting a start and end date.
- 2) Add new notes by clicking the 'Add New Note' button.
- 3) Add the information you are wanting in your note in the top box.
- 4) Attach 'Images,' 'Videos,' and/or 'Documents.'
- 5) Select the area of the map you want the note to display.
- 6) Add a reminder date and time with the 'Calendar' and 'Clock' icons.
- 7) Once you have added what is needed for the note click 'Save' and the note will be added.

TASKS

To add a new 'Task,' start by clicking on the black 'General Tasks' tab at the bottom of your screen and select the 'Tasks' tab.



1)Click on the 'Add Task' button, type in a title for your new task, and filter users by their qualifications.



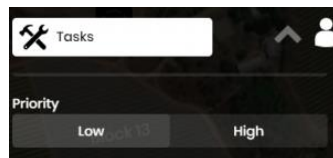
2)Click on the space under 'Assign To' and select who you would like the task assigned to from the staff names list. (This person will be notified of the Task via their preferred contact method).

3)Add a Description and click on the space below 'Category' to either type in a new category class (and select the option that you typed) or select from pre-entered options from the drop-down list that appears when you click on the space.

4)Click on the 'Set Location' button and select the point on the map that you want the task assigned to.

5)Select the level of a priority either a 'Low' or a 'High' priority.

6)Choose the state the task is in.



7)Enter the estimated duration of time the task will take and select the date and time you would like this task completed.

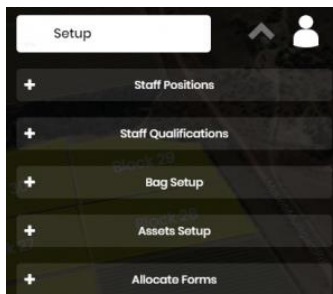
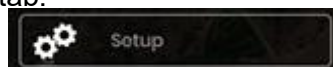
8)You can choose to attach an 'Image,' 'Video,' and/or 'Document' by selecting the appropriate icons.



9)Once all the information has been added for the new task click 'Save New Task.'

SETUP

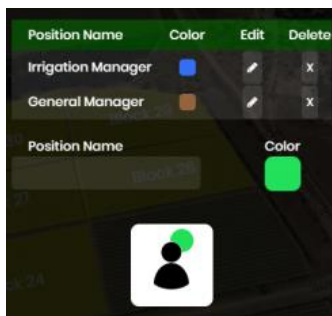
To 'Setup' your general tasks, start by clicking on the black 'General Tasks' tab at the bottom of your screen and select the 'Setup' tab.



1)Click through all the sections displayed on the screen when you click 'Setup'

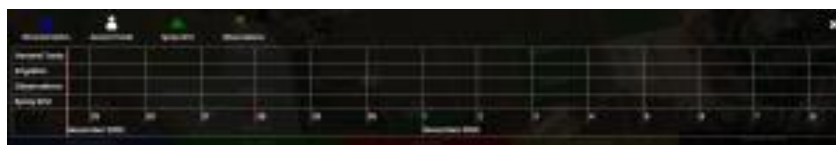
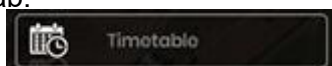
2)As you click through the sections fill out all the information.

3)Add names, give staff a certain colour, edit an already added position, and delete staff members in the 'Staff Positions' section then click 'Add Position.'



TIMETABLE

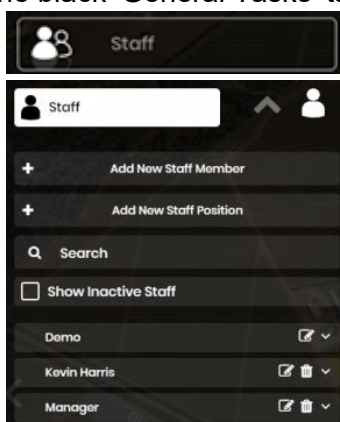
To add a 'Timetable,' start by clicking on the black 'General Tasks' tab at the bottom of your screen and select the 'Timetable' tab.



1)Click the 'Timetable' tab to view all reports, notifications, notes, and forms coming up.

STAFF

To add 'Staff,' start by clicking on the black 'General Tasks' tab at the bottom of your screen and select the 'Staff' tab.

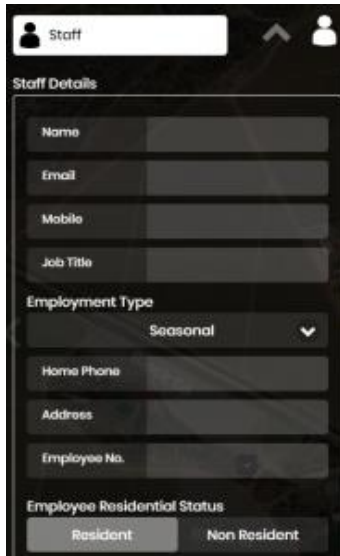
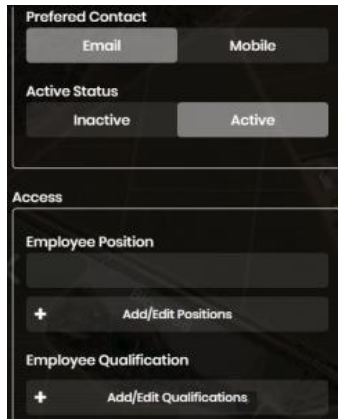
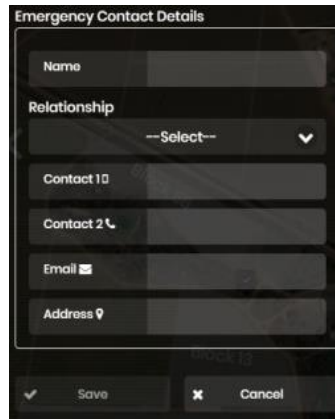
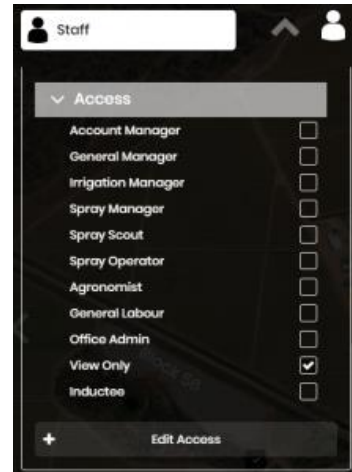


1)Click to 'Add New Staff Member,' 'Add New Staff Positions,' search for staff, show inactive staff, and see the list of staff that has already been added.

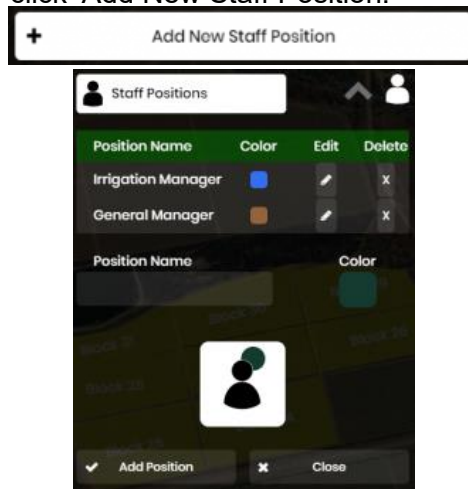
2)To add a new staff member click the 'Add New Staff Member.'



3)After filling out all the information for adding a new staff member click 'Save' and the staff member will be added.

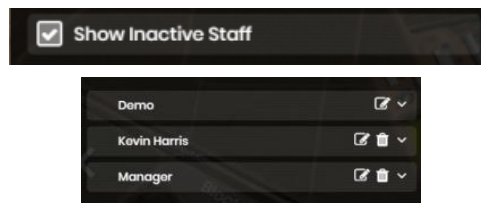





4)To add a new staff position, click 'Add New Staff Position.'



5)Add the position name and select the colour for the staff position, you can also edit or delete previously added position names by clicking the 'Pencil' icon or the 'X' icon.

6)Click the box to show the inactive staff.



7)Click the 'Pencil' icon to edit the staff info or the arrow to see contact information.

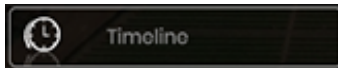


8)Click the 'Trash Can' icon to delete staff members.

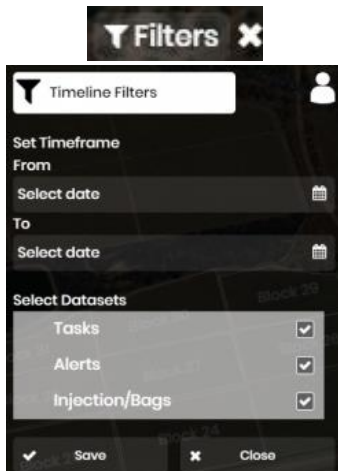


TIMELINE

To add a 'Timeline' start by clicking on the black 'General Tasks' tab at the bottom of your screen and select the 'Timeline' tab.



- 1) Scroll your mouse on the timeline to see the different dates.
- 2) Click the 'Filter's' icon to add information or the 'X' to close the timeline.



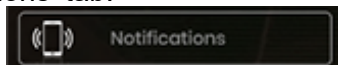
- 3) Click the 'Calendar' icon to select the dates for the 'Datasets' you are adding to the timeline.



- 4) Select the 'Datasets' you want to be added.
- 5) Click the 'Save' icon and the information will then be added.

NOTIFICATIONS

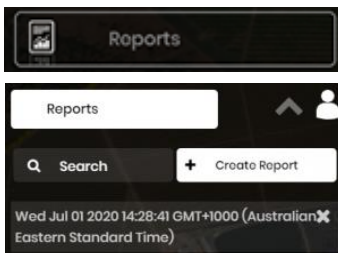
To add or see 'Notifications,' start by clicking on the black 'General Tasks' tab at the bottom of the screen and select the 'Notifications' tab.



- 1) This is where you can see the notifications that have been added to the general tasks.

REPORTS

To add a 'Report,' start by clicking the black 'General Tasks' tab at the bottom of your screen and select the 'Reports' tab.



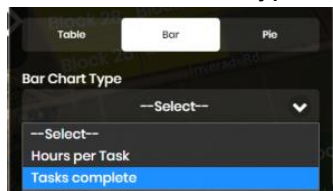
1)Click 'Create Report' to add a new report to the system.

A screenshot of a mobile application interface titled "Display Options". It features a dark theme with white text. At the top right is a user profile icon. Below the title is a "Report Name" text input field. The "Date Select" section has three buttons: "1 Week", "1 Month", and "Custom". The "Report Item Type" section has two buttons: "Task" and "Form". The "Table Type" section has three buttons: "Table", "Bar", and "Pie". Below these is a "Table Type" dropdown menu with "--Select--" and a downward arrow. The "Users" section has a dropdown menu with "Roles" and a checkbox. The "Tasks" section has two dropdown menus: "Task Progress" and "State", each with a checkbox.

2)Add the report name and select the date for the report. 'One Week,' 'Once Month,' or a 'Custom' date.

3)Select the report item type either, 'Task' or 'Form.'

4)Choose between, 'Table,' 'Bar,' or 'Pie' for the table type.

A screenshot of a mobile application interface showing a dropdown menu for "Bar Chart Type". The menu is open, showing options: "--Select--", "Hours per Task", and "Tasks complete". The "Tasks complete" option is highlighted in blue. Above the dropdown are three buttons: "Table", "Bar", and "Pie".

5)Select the user's 'Role' for the report.

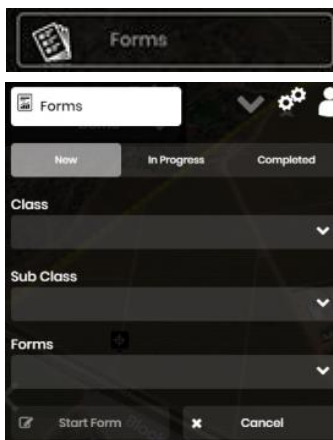
6)Select the 'Task Progress' and the 'State' of the report either 'Low' or 'High.'

7)Include the name of the type of report you are filling out.

8)Once all the information is filled out click 'Save.'

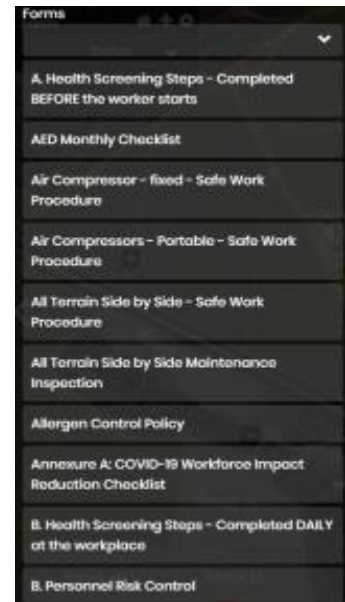
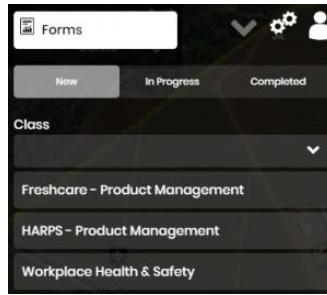
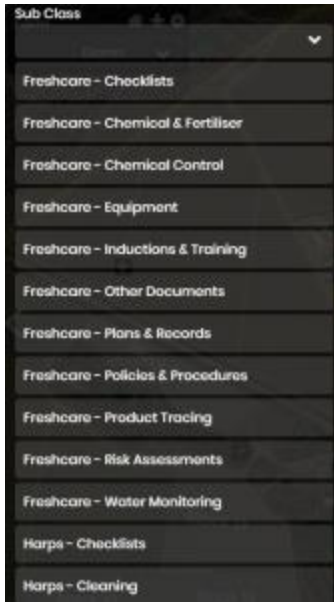
FORM

To add a 'Form,' start by clicking on the black 'General Tasks' tab at the bottom of your screen and click on the 'Forms' tab.

A screenshot of a mobile application interface titled "Forms". It features a dark theme with white text. At the top is a "Forms" header with a document icon. Below the header is a "Forms" text input field. There are three buttons: "New", "In Progress", and "Completed". Below these are three dropdown menus: "Class", "Sub Class", and "Forms". At the bottom are two buttons: "Start Form" and "Cancel".

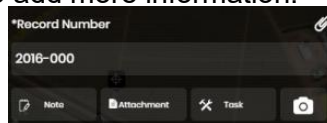
1)Click 'New,' 'In Progress,' or 'Completed' to see the different forms in each of those sections.

2) To add a new form be in the 'New' section of the forms screen and choose the 'Class,' 'Sub Class,' and 'Forms' then click 'Start Form' to begin filling out the information.



3) After you click 'Start Form' a new display will come up to add the information to the form you have selected to fill out, there might be more than one page, if so, click the 'Next' button until all the information is filled out.

4) The 'Paperclip' icon allows you to add more information.

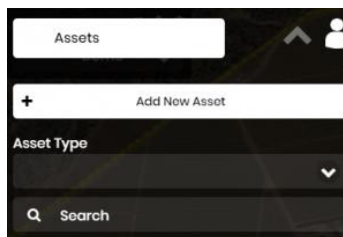
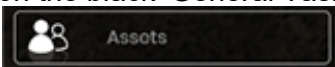


5) Once you have included all the information, click the 'Sign Signature.'

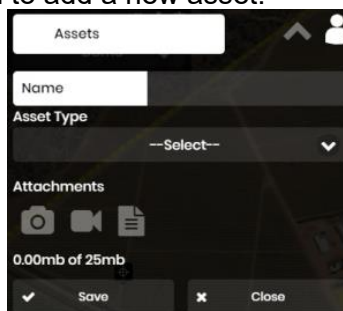
6) The option is there to either 'Complete' the form or 'Save and Exit'. The 'Complete' button will add the form to the 'Completed' section and the 'Save and Exit' button will add the form to the 'In Progress' section.

ASSETS

To add an 'Asset,' start by clicking on the black 'General Tasks' tab at the bottom of your screen and click on the 'Assets' tab.



1) Click the 'Add New Asset' button to add a new asset.

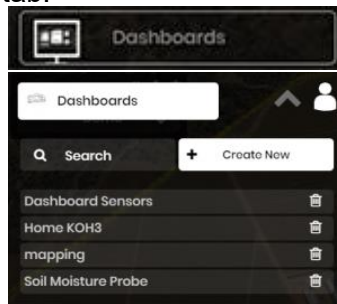


2)Add the 'Name,' 'Asset Type,' and add 'Attachments.'

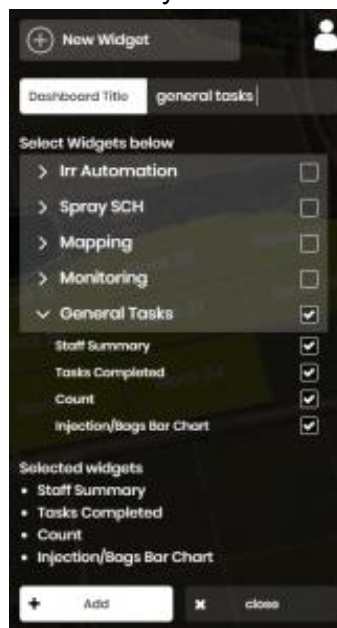
3)Once all the information is added click the 'Save' button and the new asset will be added.

DASHBOARDS

To add a 'Dashboard,' start by clicking on the black 'General Tasks' tab at the bottom of your screen and select the 'Dashboard' tab.



1)Click 'Create New' to add new information to your dashboard.



2)Add a title to your dashboard and select the widgets you want to add.

3)Click the 'Add' button once you have selected the widgets you want to be displayed.

4)The dashboard screen will then pop up showing a widget display of what you have selected to be shown.

If you cannot find what you need in the pdf, please contact our support team on (07) 4091 1052 or email us at info@htmcomplete.com.au