

How to Close a Task

The screenshot shows the 'Task Detail' form in the RouteStar Solutions application. The form is divided into several sections:

- Customer Information:** Customer Parent (16th Street Location), Customer (Big Movie Theatre), Address Line 1 (123 nw. 16th. street), Address Line 2, Address Line 3, City (port st lucie, FL 34983), Contact Person (Joe Runtheshow, No Credit Limit/\$1756.41), Email Address (joe@westromsoftware.com), Phone # (800-5556666), Customer Zone, Task Type, Task Description (This Task is now complete so lets Invoice it), Task Specific Notes (THIS IS MY ADDITIONAL NOTES AREA. I CAN ADD AS MUCH INFORMATION HERE AS I WOULD LIKE.), Resolution (This is the Resolution area so I simply input a resolution and then hit "Post to Notes" to Close this task and post it to the history), Authorized By, PO #, Checklist.
- Date and Time:** Date Entered (6/16/2014 1:55:08 PM), Due Date (6/16/2014), Entered By (admin), Assigned To (Joe), Sub Assigned To, Call Concerning, Timeframe Requested, Start Time (2:00 PM), Length of Time (30 Minutes), End Time (2:30 PM).
- Task ID and Status:** Task ID (T1177), Priority (0), Date Complete, CompletionTime, Complete (N), Complete on Mobile, Printed?, Was Emailed?, ** 3 Route Stop(s) on Tech1 Sched Day Thursday **, ** 1 COMPLETED TASKS. **, ** 1 OPEN TASKS. **
- Task Type Questions:** A table with columns 'Seq', 'Question', and 'Answer'. The first row shows '0' in the 'Seq' column.

A red arrow points from the 'Resolution' field to a text box that reads: "Once you have added a Resolution you can either click the button to **Post to Notes** or click the button to **Invoice** this task."

Once a task is completed and has a "Resolution" entered you can remove it from the task list by doing 1 of the following 2 steps listed.

A. Post the Task to Notes - If you would like to simply close the task and place it into History you would click the "Post to Notes" button along the top of the task. You can then revisit the task at any time by going clicking the drop down for "Tasks and Work Orders" and then selecting "Closed Task List".

B. Invoice the Task - If you would like to Close the task AND Invoice the task you will need to input a "Resolution" and then hit the button that says, "Invoice" along the top of the task. Then click YES on the popup that says, "Would you like to create a Invoice?". The system will create an invoice and close the task. You can access the closed task at any time by clicking the drop down for "Tasks and Work Orders" and then selecting "Closed Task List".