

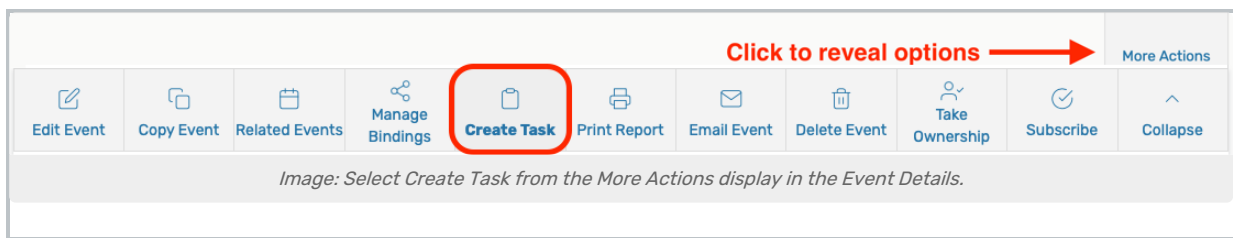
Creating To Do Tasks

With the right security privileges, you can create a To Do task for an event or a generic To Do task not related to any event.

To Create a To Do Task For an Event

1. Access the Create Task Window

Find and open the event you want to create a To Do task for, then choose **Create Task** from the **More Actions** menu.



2. Enter Task Name and Comments

Create Task

Task Name:

Comment:

Assigned By:

Smith, Jane

Assigned To:

EDIT

✕ Smith, Jane

Due Date:

Tue Jul 06

Create

Image: The task details can be completed from the More Actions menu.

Add a name for the task, any comments, and select the task completion due date.

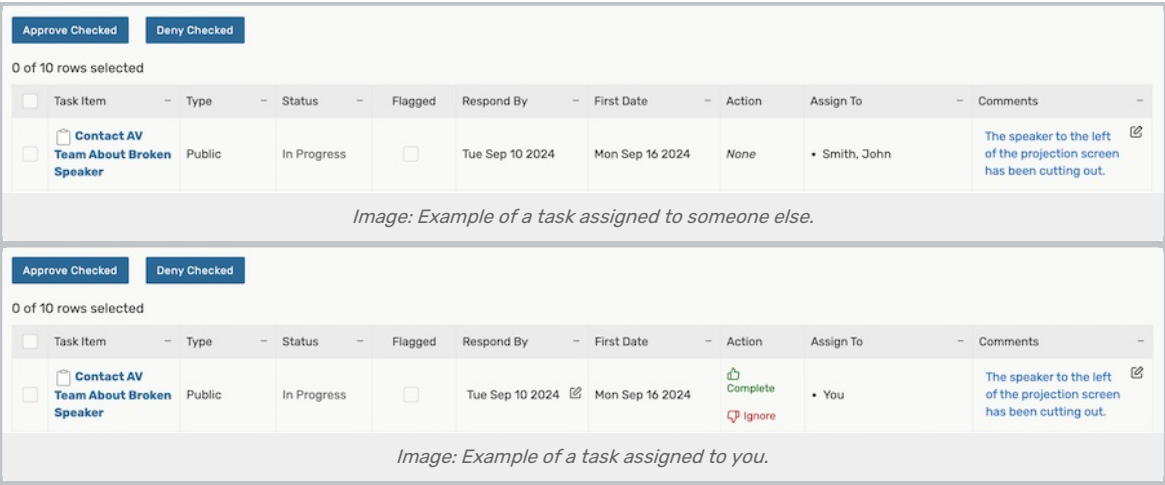
In the **Create Task** display that opens, enter a name for the task and any comments you want to make about the task, then select the task completion due date. Task name and completion due date are required. You are listed as the task assignee by default.

3. Assign the Task

If the person (25Live contact) you want to perform the To Do is someone other than yourself:

- Click or tap **Edit** link near **Assigned To**
- Type all or part of the contact's name to search

- Select the contact from the displayed list, then use the **Done** button



4. Generate the Task

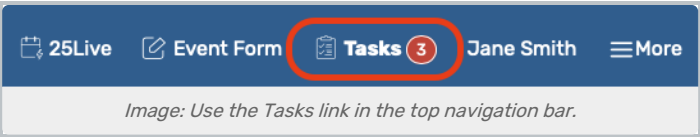
Click or tap **Create** to generate the To Do task and add it to the tasks associated with the event. Close the confirmation window.

You may need to use the **Refresh** button to see your new task.

To Create a Generic To Do Task

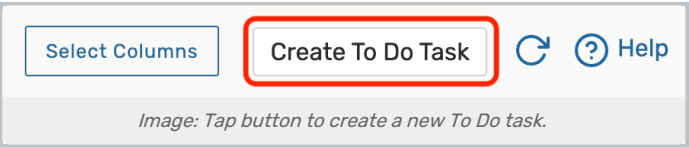
1. Access the Tasks View

From the 25Live Home page, use the **Tasks** link in the [top navigation bar](#).

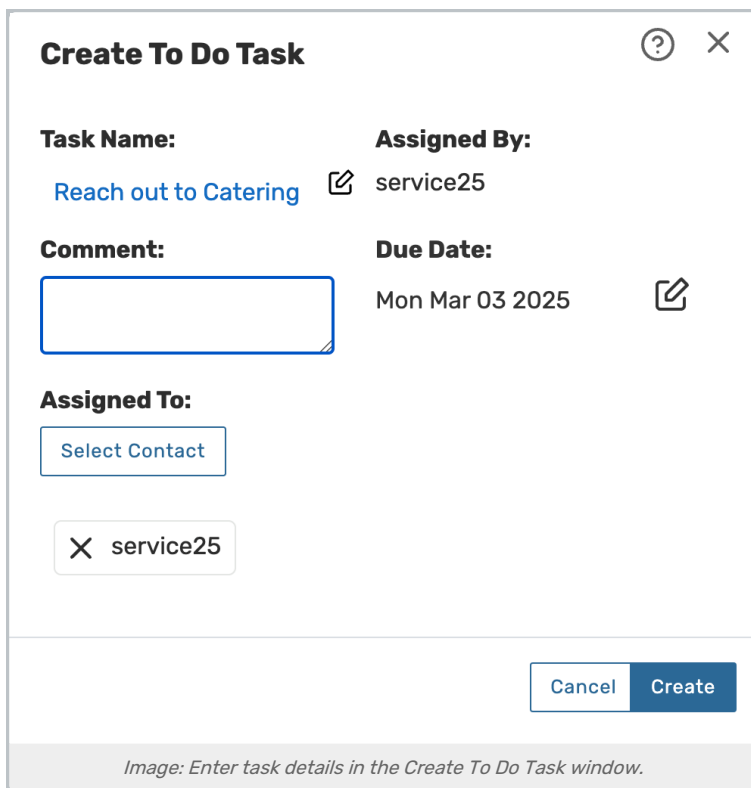


2. Create the Task

Use the **Create To Do Task** button to start the process.



3. Add Name of Task and Comment



Create To Do Task

Task Name: Reach out to Catering

Assigned By: service25

Comment:

Due Date: Mon Mar 03 2025

Assigned To:

Select Contact

service25

Cancel Create

Image: Enter task details in the Create To Do Task window.

In the **Create To Do Task** window that opens, enter the **Task Name**, any **Comment**

4. Assign the Task and Set Due Date

You are listed as the task assignee by default.

If the person (25Live contact) you want to perform the To Do is someone other than yourself:

- Click or tap **Edit** below **Assigned To**
- Type all or part of the contact's name
- Select the contact from the displayed list, then use the **Done** button

Then, select the task completion **Due Date**. This date will be reflected in **Respond By** columns.

Click or tap **Create** to generate the task. Close the confirmation window.

You may need to use the **Refresh** button to see your new task.