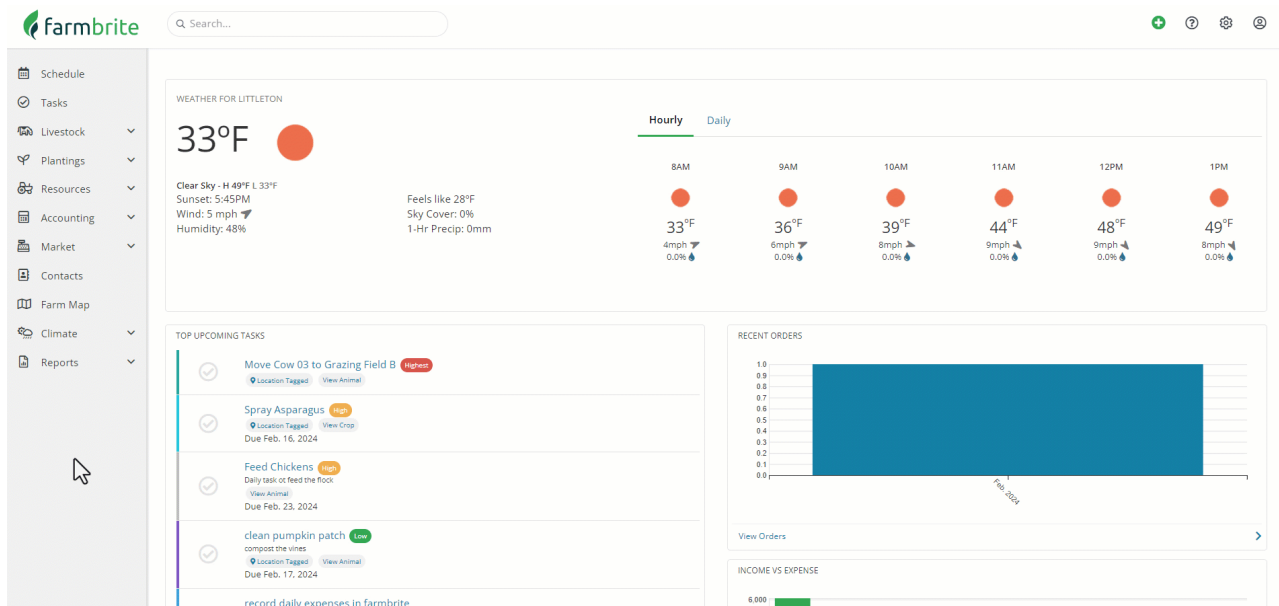


Getting Started with Tasks

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Farmbrite's Tasks feature is an easy way to manage all the work that needs to be done around your farm and business. A task is basically a "to-do". You can keep a list of tasks, assign them to your coworkers, check in on the progress, and record how long they took to complete.

If you have any tasks assigned for today, you will see them on your Farmbrite dashboard under the Top Upcoming Tasks widget. If you don't have any yet, or want to see tasks due further in the future, select Tasks from the left navigation menu.



Tasks Views

You should immediately notice the three tabs in the upper left - **List**, **Board**, and **Calendar**. These provide three options for you to view your tasks in different ways. You can switch back and forth between them anytime, and [choose a default view in your account settings](#).

- The **List View** shows an itemized grid. It is able to be sorted by the different column headers, allowing you to order these tasks by priority, due date, assignee, status, name, or the resource the tasks are assigned to.
- The **Board View** displays a series of status columns that track the progress of your task. You can move the task card across the board into different columns to transition its status. This view provides a quick at-a-glance view of the progress of your tasks. You can [customize the columns/statuses in your account settings](#) as well.
- The **Calendar View** acts as a schedule for your tasks. You'll see when tasks are due, and when you are scheduled to work on them.

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Tasks

Add Task

Task	Associated To	Due	Priority	Status	Assignee
Harvest these stalky stalks - Asparagus , Green Stalks	Asparagus, Green Stalks			To Do This Month	Flanders
need to change the oil - Roxor Mahindra Side by Side/ UTV	Roxor Mahindra Side by Side/ UTV				
Move Cow 03 to Grazing Field B	Cow 3 [CPL5011]		Highest	AM Tasks	Chris
Tractor Maintenance	John Deere 5070E John Deere Tractor	Aug. 01, 2023	Medium	To Do	
Start seeds for Lemon Mint from Northwest Field B location	Lemon Mint	Aug. 01, 2023		Unassigned	
Retreat Alternative Therapy	Cow 07	Aug. 19, 2023		Backlog	Unassigned
Retreat Fertilize	Asparagus, Green Stalks	Sep. 05, 2023		Backlog	Unassigned
Plant Broccoli in Northwest Field B location		Sep. 20, 2023		To Do	Unassigned
Harvest Broccoli from Northwest Field B location	Northwest Field B	Oct. 02, 2023		Backlog	Unassigned

Adding a Task

You can add a new task by clicking on the green 'Add Task' button. You'll be prompted to provide information about the task. When is it due? Who should it be assigned to? You can provide a short description of what needs to be done, and then optionally associate the tasks with Livestock, Fields, or Equipment too. You can even add a checklist to the Task if it involves multiple steps, and select what color it should be displayed as on your Task List. After supplying the information, click Create to add this to your Task List,

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Tasks

Add Task

Task	Associated To	Due	Priority	Status	Assignee
clean pumpkin patch	Northwest Field A	Feb. 17, 2024	Low	Backlog	Chris
record daily expenses in farmbrite		Feb. 19, 2024		In Progress	Chris
Tractor Maintenance	John Deere 5070E John Deere Tractor	Feb. 23, 2024	Medium	Backlog	Unassigned
Brush Horses		Feb. 23, 2024	Highest	In Progress	Unassigned
Spray Asparagus	Asparagus, Green Stalks	Feb. 23, 2024	High	To Do This Week	Chris
Start seeds for Broccoli from Northwest Field A location	Broccoli	Feb. 26, 2024		To Do This Week	Unassigned
Feed Chickens	Chickens - Rhode Island Reds	Feb. 27, 2024	High	In Progress	Chris
Brush the Alpacas		Feb. 28, 2024	Highest	To Do This Week	Unassigned

Assigning Tasks

When you create or edit a task, you'll have the opportunity to assign it to a user or a team. *You can learn more about creating teams here.* Beyond those options, you can also assign collaborators for the task to work with the assignee or the team as well. When you assign the task, any assignee, collaborator, or team member will receive an email notification that a task was assigned. For a full walkthrough of this feature, check out this related article - [How do I assign a task to someone at my facility?](#) You can also assign subtask checklist items to users for separate steps in the task, and they will also get an email notification

and see the task on their list in Farmbrite.

You might think of the main Assigned To field on the right as the manager ultimately responsible for the task, while the subtasks can be assigned to other individuals to complete individual aspects of the work. Even when assigning teams, the main assigned to field can still be used for the manager or supervisor who is responsible for ensuring the work is completed.

In the example below, we have added the Farmers Market Saturday Crew as the team, and then assigned the task overall to Chris. We're also collaborating with Matthew, as he has been working with event organizer and can be a helpful resource for us even though he won't be there that day. Dennis, Reed, and Ned also play their part in the checklist items. All of these users will get [notifications that the task was assigned](#) to them, and won't get duplicates if they are part of the team as well.

The screenshot shows the 'New Task' form in the Farmbrite application. The form is titled 'New Task' and has a close button (X) in the top right. It contains several sections: 'Title' (Prep for the Farmers Market), 'Status' (To Do), 'Assigned To' (Chris), 'Team' (Farmers Market Saturday Crew), 'Additional Collaborators' (Matthew), 'Priority' (To Do), 'Due Date' (mm/dd/yyyy), 'Repeats' (Does not repeat), 'Hours Spent' (empty), 'Description' (Get everything ready and load it into the truck to be ready for tomorrow's market.), 'Checklist' (Gather products for sale, Be sure to get Tablet for POS, Load the truck), 'Add Checklist Item', 'Add Map Location', 'Add Attachment', 'Associated To' (Find Animal, Equipment), and 'Task Color' (a row of colored circles). The background shows the Farmbrite interface with a sidebar menu and a task list.

Repeating Tasks

Some tasks are routine and reoccur at certain intervals - perhaps you have daily or weekly chores, or have a task that you need to ensure gets completed every month. You can set these tasks to recur using the Repeats menu. You can make the task repeat daily, weekly, monthly, or yearly. You are also able to set the number of days/weeks/months/years between when a task repeats - maybe you have a task that needs to be done every three days like in our example image below. You can also choose if the repetition should be synced to the due date of the task, or the day it was completed. Let's take a look at two examples to understand that selection.

- If you select the box to "repeat based on date completed", the software will create the next instance of the tasks based on when you completed the current. So if it was a weekly task due Wednesday, but you completed it late on Thursday, the next repeated instance would be due the next Thursday.
- If you do not select that box, the task will always repeat based on the original due date, regardless of when it was completed. This means if you completed that same task from the example above late on Thursday, it would still repeat the next instance on Wednesday next week, when it would have been originally due to stick to the schedule.

Be aware that you can set an end date to the repetition, as some tasks may be seasonal.

After saving our example, separate task records will be scheduled for each time we need to move the herd, each having a unique due date set 3 days from the last, all the way through August 31st. The next task will be shown in your task list when the current one is marked as completed, giving you a cleaner experience with the repeated tasks and preventing you from being overwhelmed with too many at once on your list. Alternatively, if you don't actually complete the task instance, but want the next one to be shown, you can mark the previous task as missed, skipped, or incomplete to create the next instance. The first occurrence's due date is set in the main Due Date field above. *Note that you may set up to 100 occurrences of the task. Need more than that? You can add a Task to remind yourself to add additional recurring dates in the future.*

Recording Hours Spent

Tasks are able to track the hours spent working on them. This feature helps you gauge the effort and time required for different tasks, and can help you better budget resources for tasks in the future. You'll later be able to see these hours spent on your Task reports, and find out which tasks are taking the longest to complete. This could help you focus on specific tasks to find efficiencies and improvements in your processes.

Completing Tasks

You complete tasks in different ways depending on the view you are using. For the List View, you can simply mark a task complete by clicking on the circle in the left hand column. You'll see a green check mark appear, and the task will be crossed off your to-do list. If you are in the Board View, then drag the card for the task to the done column. Finally, if you're using the Calendar View, you can open the task appointment and set the status to done.

The screenshot shows the Farmbrite application interface. On the left is a sidebar with a menu including Schedule, Tasks, Livestock, Plantings, Resources, Accounting, Market, Contacts, Farm Map, Climate, and Reports. The main content area is titled 'Tasks' and has tabs for List, Board, and Calendar. The 'List' tab is active, showing a table of tasks. At the top of the table is an 'Add Task' button and a search bar. The table has columns for Task, Associated To, Due, Priority, Status, and Assignee. A mouse cursor is hovering over the 'Brush Horses' task row.

Task	Associated To	Due	Priority	Status	Assignee
<input checked="" type="checkbox"/> clean pumpkin patch compost the vines <small>Location Tagged</small>	Northwest Field A <small>Grow Location</small>	Feb. 17, 2024	Low	Backlog	Chris
<input checked="" type="checkbox"/> record daily expenses in farmbrite <small>Location Tagged</small>		Feb. 19, 2024		In Progress	Chris
<input checked="" type="checkbox"/> Brush Horses brush em and edit the tasks <small>Location Tagged</small>		Feb. 23, 2024	High	In Progress	Unassigned
<input checked="" type="checkbox"/> Spray Asparagus <small>Location Tagged</small>	Asparagus, Green Stalks <small>Crop</small>	Feb. 23, 2024	High	To Do This Week	Chris
<input checked="" type="checkbox"/> Tractor Maintenance Check off each item as you complete it. Use this video for instructions. Come see me with a... <small>Location Tagged</small>	John Deere 5070E John Deere Tractor <small>Equipment</small>	Feb. 23, 2024	Medium	Backlog	Unassigned
<input checked="" type="checkbox"/> Start seeds for Broccoli from Northwest Field A location	Broccoli <small>Planting</small>	Feb. 26, 2024		To Do This Week	Unassigned
<input checked="" type="checkbox"/> Feed Chickens Daily task of feed the flock	Chickens - Rhode Island Reds <small>Animal</small>	Feb. 27, 2024	High	In Progress	Chris
<input type="checkbox"/> Brush the Alpacas					

We also know that some tasks might get completed on your farm without the Farmbrite task being immediately updated; you might tick the checkmark for complete the next day, or a few days from now. To let you accurately reflect when the task was completed, you can click on the task and then check the box for Task Complete. This opens a field for you to type in a date, with today's date populated. You can back date this if you need though.

Fertilize Tomatoes

Title

Fertilize Tomatoes

Description

Add Night-Tro-Gen fertilizer at 11pm.

Add Checklist Item

Add Map Location

Associated To

Plant: Tomatoes, San Marz

Task Color

Task Complete

Completed On

06/20/2023

Assigned To

Chris

Priority

Due Date

mm/dd/yyyy

Hours Spent

Created Jun. 08, 2023 - Chris

Last updated Jun. 20, 2023

Close

Update

Deleting Tasks

Like the steps to complete a task above, the process of deleting a task is slightly different for each view. If you're looking at the List View, click the three dots on the right and choose Delete Task. If you're on the Board or Calendar views, open the task and click the delete button. Be careful though - **once deleted, a task cannot be restored.**

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Schedule

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Reports

List

Board

Calendar

Add Task

...

Title

All Users

All

Task	Associated To	Due	Priority	Status	Assignee
record daily expenses in farmbrite		Feb. 19, 2024		In Progress	Chris
Brush Horses		Feb. 23, 2024	High	In Progress	Unassigned
Spray Asparagus	Asparagus, Green Stalks	Feb. 23, 2024	High	To Do This Week	Chris
Start seeds for Broccoli from Northwest Field A location	Broccoli Planting	Feb. 26, 2024		To Do This Week	Unassigned
Brush the Alpacas		Feb. 28, 2024	High	To Do This Week	Unassigned
Feed Chickens	Chickens - Rhode Island Reds	Feb. 28, 2024	High	Backlog	Chris
need to change the oil - Roxor Mahindra Side by Side/ UTV	Roxor Mahindra Side by Side/ UTV	Feb. 29, 2024		Blocked	Unassigned
Move Cows to Grazing Field B	Cow 3 [CFL5011]	Mar. 01, 2024	High	To Do This Week	Chris
Prep Truck for Farmers Market		Mar. 01, 2024	High	To Do This Week	Dennis

Still need help with tasks? [Contact us here.](#)

