Assigning Tasks

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You likely have a group of staff members qualified to work on many things around the farm, with some of them being highly specialized at specific tasks as well. Of course it benefits you to make sure the right person or group works on the right task, and that they know who they can reach out to for additional questions and expertise. They'll also need to have easy access to view what is assigned to them, and it would probably be helpful or them to get notified with reminders as well. Farmbrite's task assignments make all of this simple to help ensure nothing falls through the cracks.

For a refresher on how to create Tasks in Farmbrite, check out this article.

Assigning Tasks

Task assignments can be accomplished when creating or updating a task, so to do this simply open a task record and find the assignment fields.

First, be aware that you can assign tasks and events to individual users or an entire team, and then add additional collaborators to the task too. You can use any combination of the three to ensure the right person sees the right task for them. When you create a task you'll see three options for this.

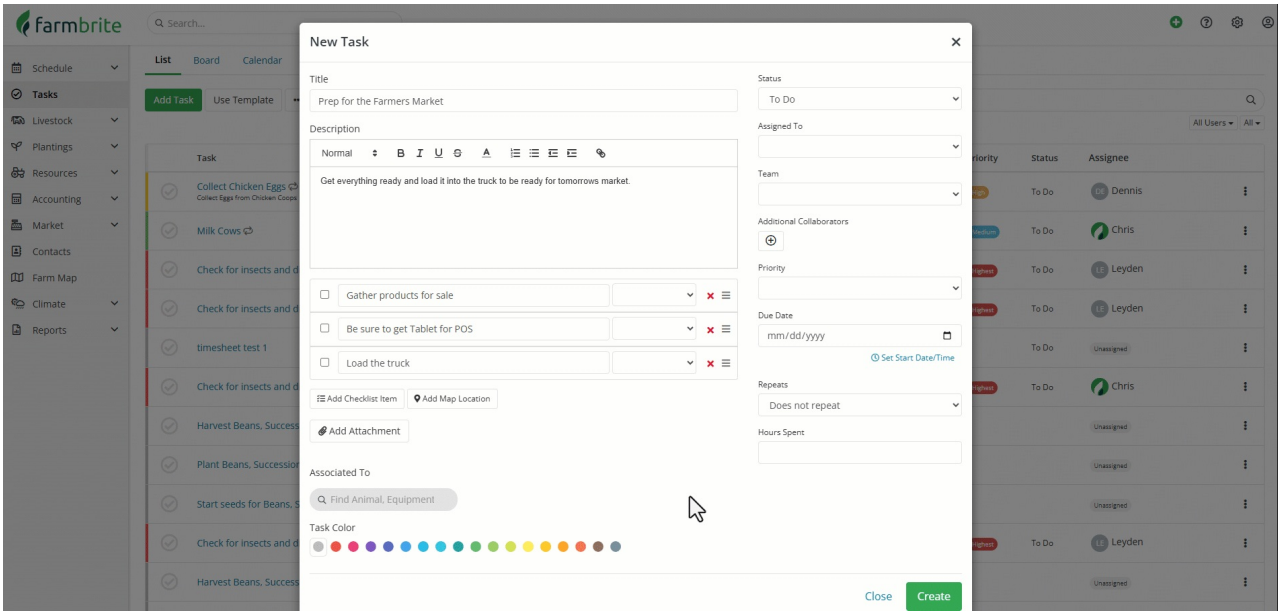
- Assigned To - This menu is used to assign a main user who is ultimately responsible for this task. Even if you add a team or collaborators below, this is the person who you'll talk to first if the tasks doesn't get done. Note: You can assign a team without assigning a main assignee if you'd like, this is not required (but probably helpful, if you'd ever asked a group why something didn't get done and were met with shrugged shoulders!)

- Team - Use this is you have previously defined teams of users, and need the whole team to be assigned to this task. All team members will see this task on their task board, and be notified about it. It's totally fine for the main assignee to be part of the team as well, they will not get duplicate notifications.

- Collaborators - This is a great way to assign more people to a task if they are not on a team together. If you just need two people to work together on something, you can assign a main assignee and add people as collaborators as you need. Collaborators get notified about the task, and see it on their task list too.

- Subtask Assignments - You can also assign individual users to checklist items in the task. If there are unique aspects of the task that should be assigned to a specific user, you can add them here. They will also be notified, and see the task on their task board.

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.



Viewing Assignments on a Task List

When you access the task list, you'll be able to filter it based on assignments. This can help you see what you are responsible for, and if you're and admin or operations manager, it can help you keep tabs on your staff too.

Depending on your permissions, you'll see options like this in the filter menu.

My Tasks - Select this to see any task that is assigned to you. This includes tasks assigned to teams you are part of, and tasks where you are a collaborator, or assigned to a checklist item.

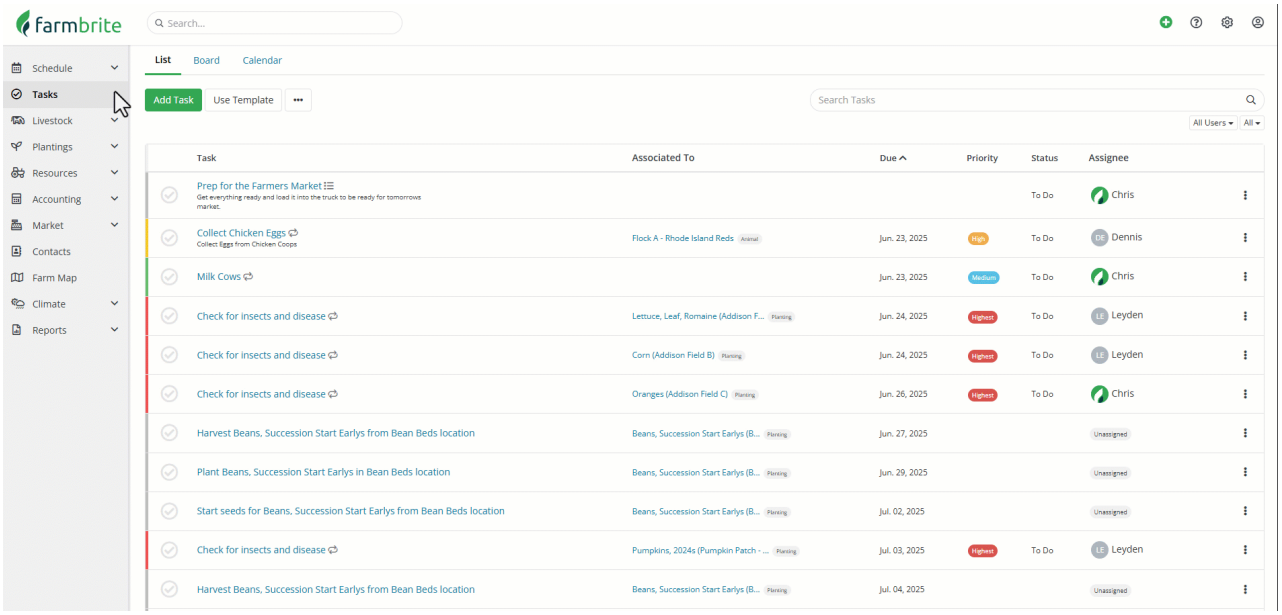
Unassigned - Take a look at all tasks that don't have anyone assigned; this is a great way to find your next task if you are looking for something to do!

All Users - A list of all tasks assigned to all users

By Assignee - This view groups the tasks into separate sections per user, and is only shown to admins and operations managers.

Specific User - Want to see just the tasks assigned to a specific user? Select their name and you'll see what they have on their plate. This one is also only shown to admins and operations managers.

Specific Team - Similar to above, but for teams, and still only shown to admins and operations managers.

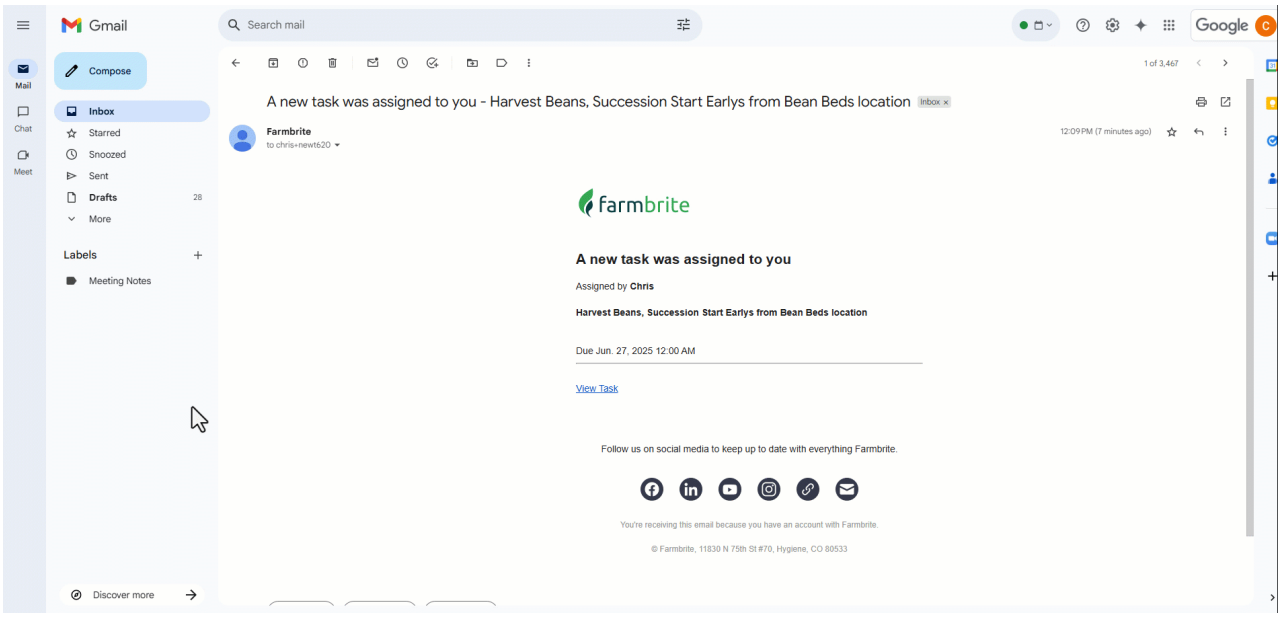


Notification Options

Users can be alerted about notification assignments in two ways; via email or push notifications.

If you'd like to get a push notification on your device when a task is assigned, check out this article for more details on setting that up.

You'll always get emails when a task is assigned to you, and they will vary slightly depending on whether you were the main assignee or part of a team or collaboration.



Note that notification emails will not be sent for tasks assigned to users who have never logged into their Farmbrite account, or have not logged in for more than 90 days. You will not get notification emails for tasks that you assign to yourself.

Still need help? Contact us here.