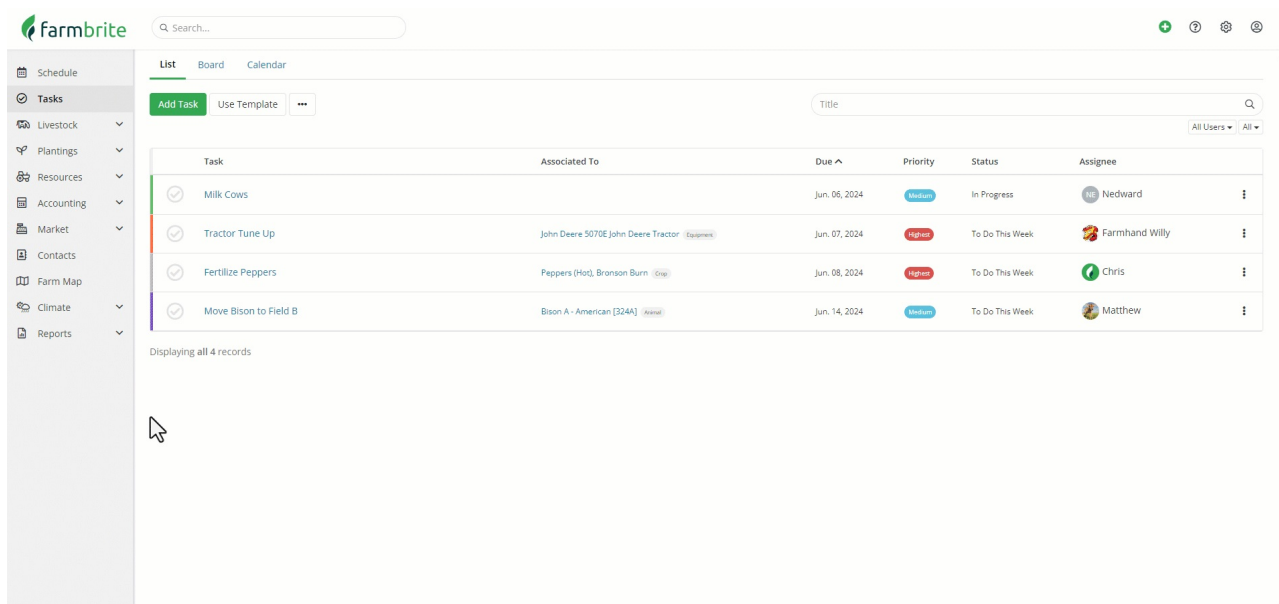# Task Templates and Series

Last Modified on 06/23/2025 7:14 am MDT

There are probably many routine and repeated tasks for you to complete around your farm. When you plant a new crop, you likely have plans for applying different fertilizers at different times throughout its lifecycle. When you birth a new animal, you have a full checklist of things to do, like giving vaccines, attaching identification tags, taking measurements, and a lot more. Field tilling, equipment maintenance schedules, and post harvest cleanup are also great examples of common tasks that you might need to add to many different records. **To save time with these, you can create task templates and task template series to make adding these routine tasks much easier and quicker.**

To get started, navigate to Tasks and click the Actions menu (3 dots). You'll see a selection for Task Templates there.

Creating Templates

To create a template to use on future tasks, click Add Template. The set up page should look familiar if you've created individual tasks previously, as you're adding many of the commonly used fields in advance. **Any information that you add to fields on the template will be automatically added to new tasks that you create from it.** So the name, description, checklist items, color, user and team assignments, and priority will all be inherited to future tasks that use this template. Note that the Days Due After Start Date field is particularly important. When using the template for a task, Farmbrite will calculate the task due date based off of this field.

In our example below, we're creating a template to apply a nitrogen boosting fertilizer to our crops 28 days from our task start date, which might be our seed start or planting date for the crop. As additional examples, you might use this to give an animal a vaccine in 15 days from your start date (birth date) or change the oil in your pick up truck 6 months from the start date (purchase date).
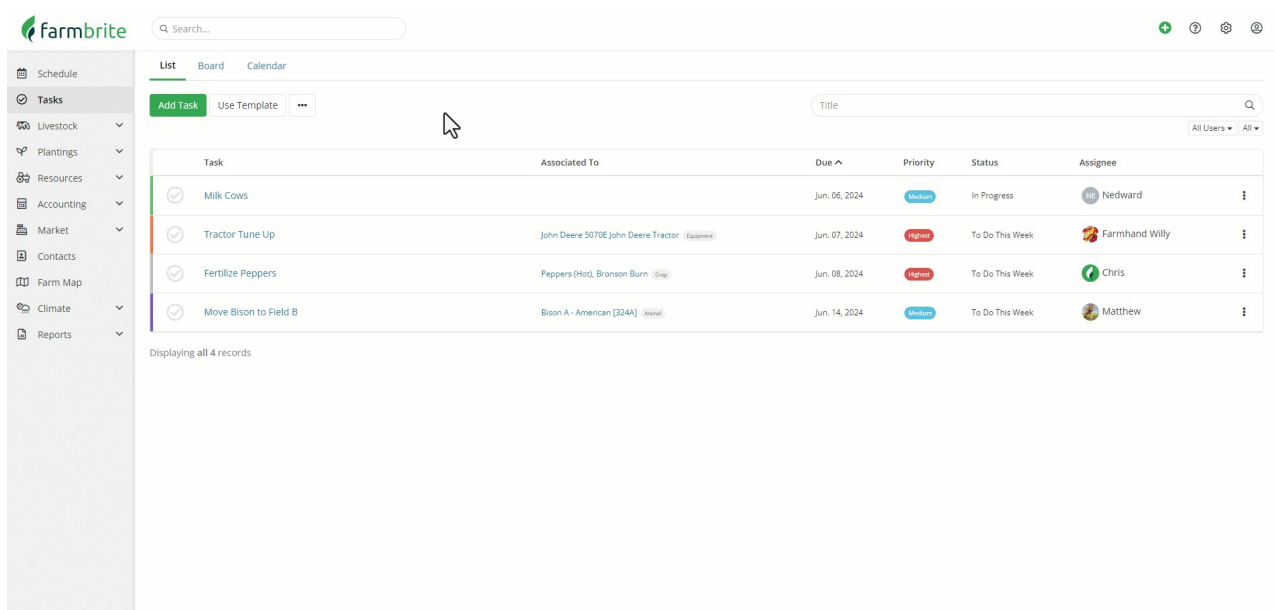
Creating a Task Series from Templates

The single examples we looked at above are helpful for individual tasks, but we also know that you most likely have many tasks linked to each other, and will likely be performing them at specific intervals for your plants, animals, and equipment. **You can link templates together in a series to create a task plan and apply all of the tasks to a record at once.** Just navigate to the same Task Templates area, and choose Add Series. You can then name the series, and add your templates to it.

Furthering our example from above, see that we have added many other task templates for our plantings:

- Weed the field at 14 days, and have that repeat every 2 weeks.
- Check for insects and disease after 7 days, and repeat every week.
- Trim lower branches after 30 days to thin the plant.
- Complete harvest clean up tasks after 75 days.
- We even made a task to till the field 10 days prior to planting, as you are able to supply a negative days number to create tasks that need to happen before the start date.
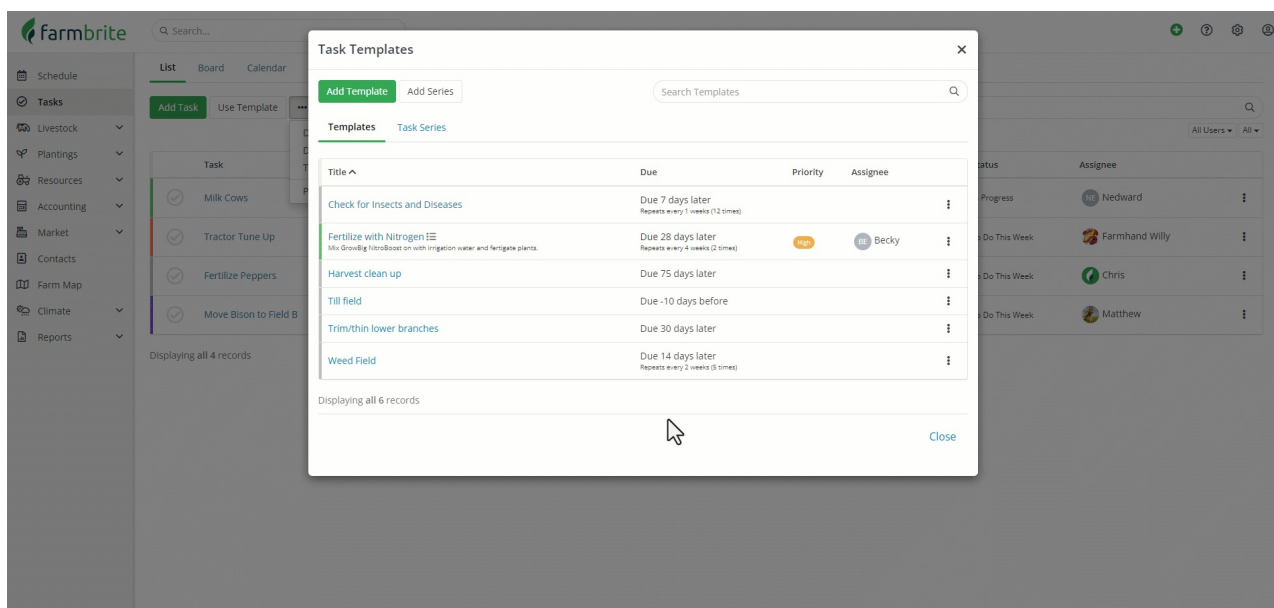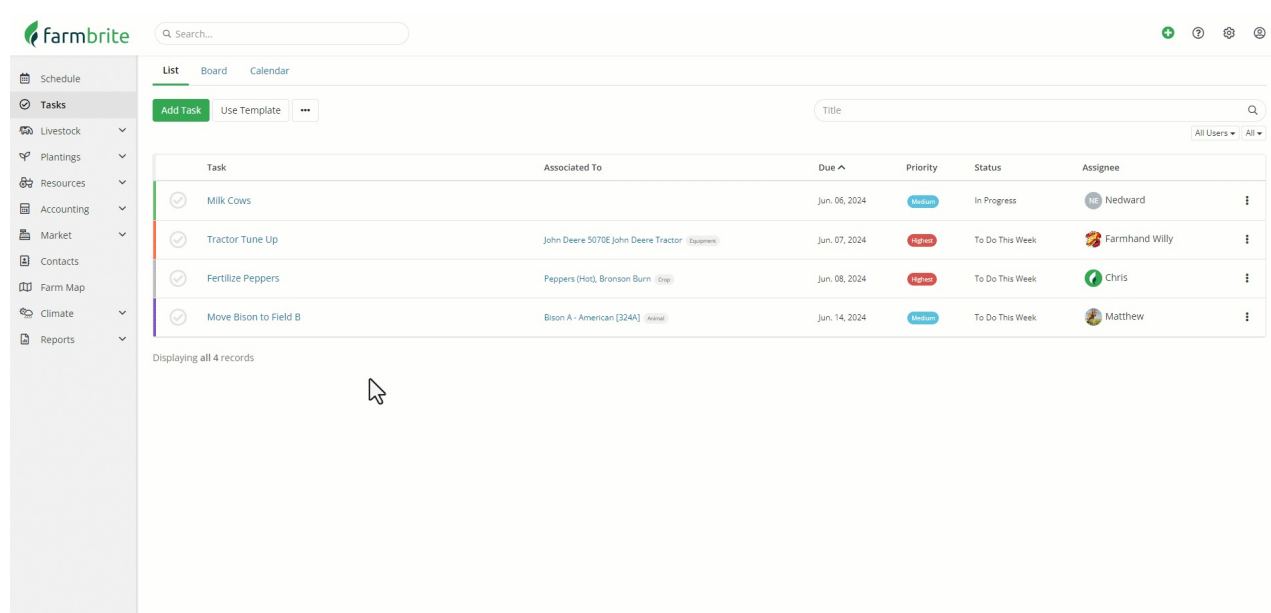
Think about how you might use the same feature for a series of vaccinations and medications for livestock, or a full equipment maintenance schedule for your farm vehicles and tools. *Be aware that you can add up to 50 templates to a series.*

Using Templates and Series

After you have set up the templates and series, you can now apply them to records. You can use them from the main tasks page, or from the individual equipment, crop, grow location, or animal records. Just click Use Template, and then select a start date, task templates/series, and a record to associate it with. As we said above, the start date is critical, as the Days Due After Start Date that you set on the templates will use this date to determine the due dates of each task.

We're adding the Crop Management Series from the example above to our peppers in the example below.

Adding Tasks When Creating Plantings

You can also add the templates and series as you create plantings. When you are adding the planting, you'll see a drop down menu to select a template or series to apply. It will create the tasks based on the planting date. Be aware that the standard seed start, planting date, and expected harvest date are still automatically created if you check the box or default them on the crop type. Also, if you adjust the planting date when editing the planting, Farmbrite will ask you if you'd like to adjust your tasks by the same date difference as well.
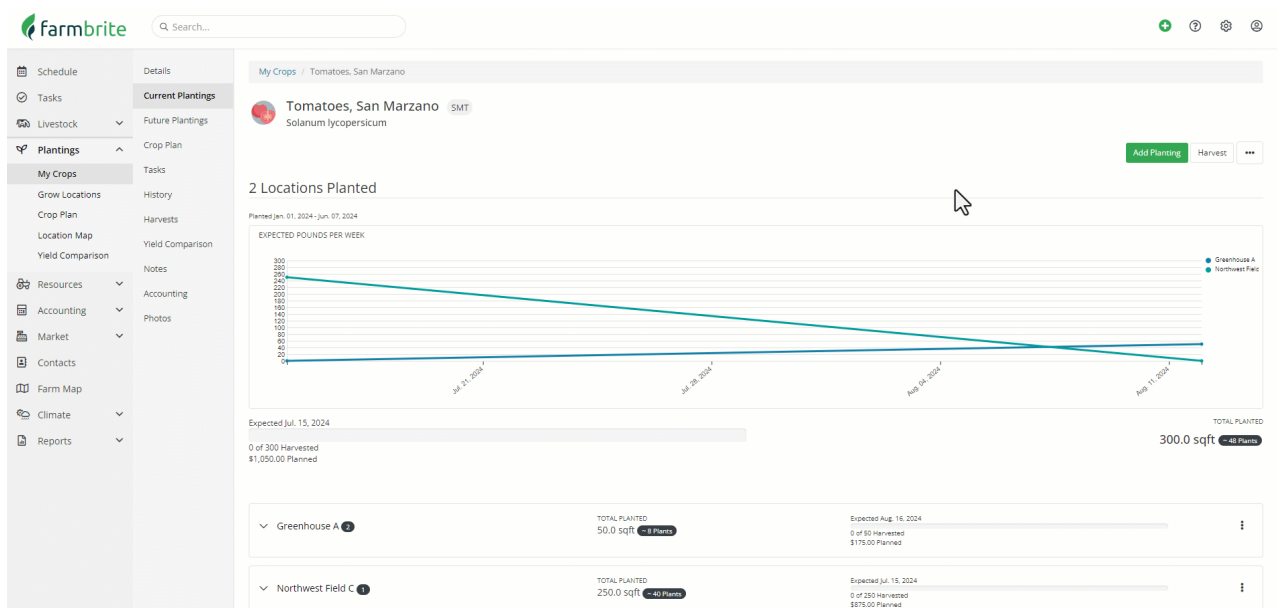
Updating Templates

If you need to pivot your processes and make changes to the templates, you can access and edit them. However, be aware that the changes you make will not update existing tasks you've already created using the templates and the series. If you want to change or delete a template or series, use the actions menu on the right to make your selection. We are adding an additional fertilizer to our task series below.

Reach out to us if you have any questions about using these templates, or ideas to enhance and improve the current feature.