

CTTK

Internal Tasks for your Team



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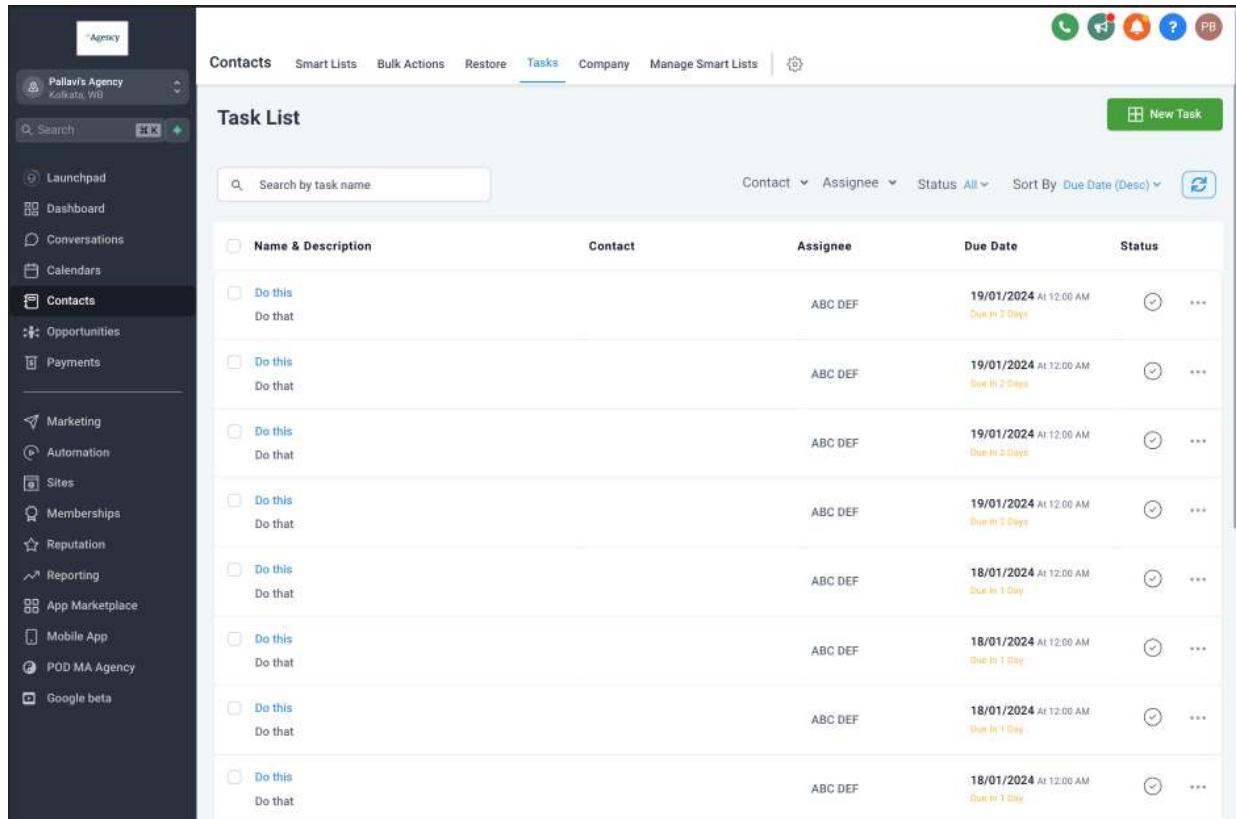
<https://youtu.be/QjncCeaalY8>

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<https://youtu.be/5mYt9yQssJU>

Create and Manage internal tasks for your team in the "Tasks List Page" for easier project management.

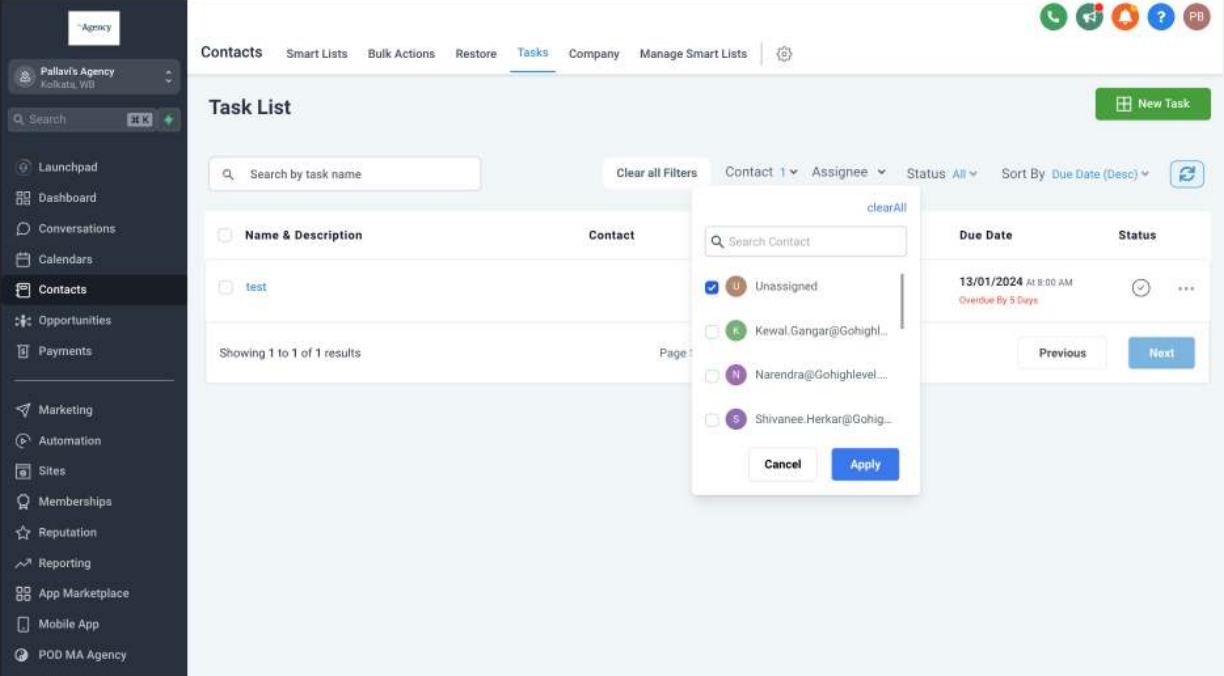


The screenshot shows the Zoho CRM interface. On the left is a dark sidebar with various modules like Launchpad, Dashboard, Conversations, Calendars, Contacts, Opportunities, Payments, Marketing, Automation, Sites, Memberships, Reputation, Reporting, App Marketplace, Mobile App, POD MA Agency, and Google beta. The main area is titled 'Task List' and shows a table of tasks. The columns are: Name & Description, Contact, Assignee, Due Date, and Status. There are 10 rows of tasks, each with a checkbox, the text 'Do this Do that', and 'ABC DEF' in the assignee column. The due dates are all '19/01/2024 At 12:00 AM' except for the last two which are '18/01/2024 At 12:00 AM'. The status for all tasks is 'Due in 2 days' except for the last two which are 'Due in 1 day'. The status column also shows a checkmark icon.

Name & Description	Contact	Assignee	Due Date	Status
Do this Do that		ABC DEF	19/01/2024 At 12:00 AM Due in 2 days	✓
Do this Do that		ABC DEF	19/01/2024 At 12:00 AM Due in 2 days	✓
Do this Do that		ABC DEF	19/01/2024 At 12:00 AM Due in 2 days	✓
Do this Do that		ABC DEF	19/01/2024 At 12:00 AM Due in 2 days	✓
Do this Do that		ABC DEF	19/01/2024 At 12:00 AM Due in 2 days	✓
Do this Do that		ABC DEF	18/01/2024 At 12:00 AM Due in 1 day	✓
Do this Do that		ABC DEF	18/01/2024 At 12:00 AM Due in 1 day	✓
Do this Do that		ABC DEF	18/01/2024 At 12:00 AM Due in 1 day	✓
Do this Do that		ABC DEF	18/01/2024 At 12:00 AM Due in 1 day	✓

Create tasks on the task list page without a contact specifically for your team members. These tasks can be used to manage work and responsibilities within your team easily

Filter Internal Tasks



The screenshot shows the 'Task List' page in a CRM system. The left sidebar is a navigation menu with various subaccounts and categories. The main area is titled 'Task List' with a search bar and filter options. A modal window is open, titled 'Contact', showing a list of contacts. The contact 'test' is selected and has a checkbox next to it. Other contacts listed are 'Unassigned', 'Kewal.Gangar@Gohigh...', 'Narendra@Gohigh...', and 'Shivanee.Herkar@Gohig...'. The modal has 'Cancel' and 'Apply' buttons at the bottom. The main task list shows one result: 'test' due on 13/01/2024 at 8:00 AM, marked as 'Overdue By 5 Days'.

Utilize the "Unassigned" option in the "Contact" filter field to filter out contactless/internal tasks for your team.

Along with creating contactless tasks, the contact can be added, removed, or reassigned anytime post a task is created giving you absolute control over managing the tasks in your subaccount

These tasks are also visible in the Tasks list on the Dashboard page.