

Automatically create a task in a sequence[Ⓜ]

This article applies to:

[Pro](#)

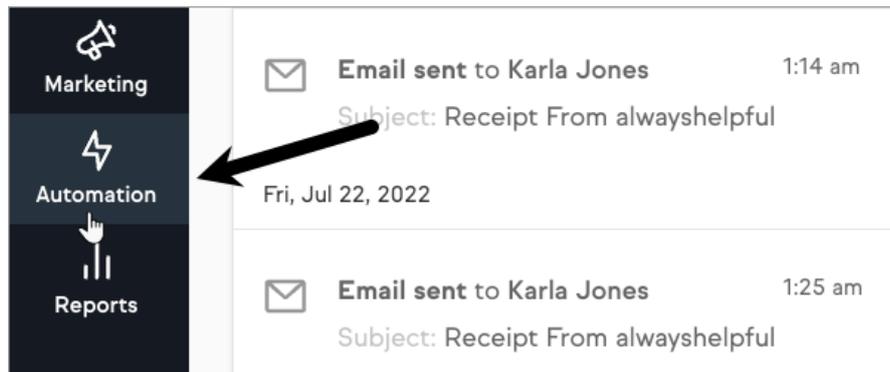
[Max](#)

The task object assigns a manual follow-up responsibility to an Keap user. The tasks are generally related to predictable events, like a welcome call after a new customer purchases or 30 day phone survey. After a task is assigned, the user is responsible for manually updating it and adding a completion date.

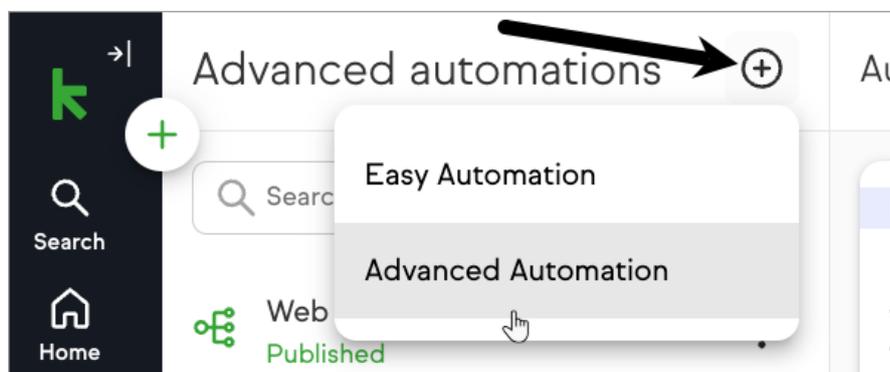
Remember! Each task object must be configured individually. They cannot be re-used in multiple sequences or at more than one point in the same sequence. Task objects are not archived. If you delete a task object from a sequence, it can only be restored if you restore a previous version of the entire automation.

Create a task with Advanced Automation

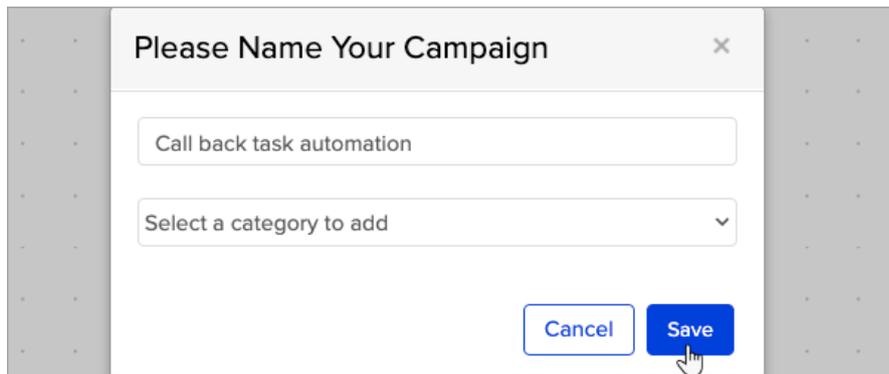
1. Click on **Automations** in the left-hand menu.



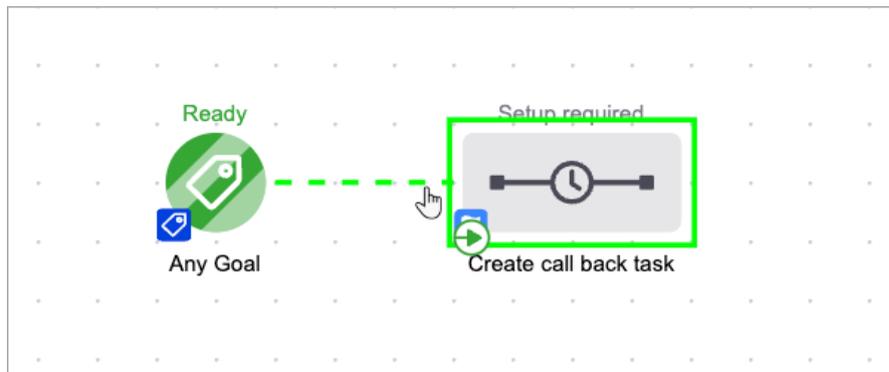
2. Click the + button to create a new automation and choose **Advanced Automation**.



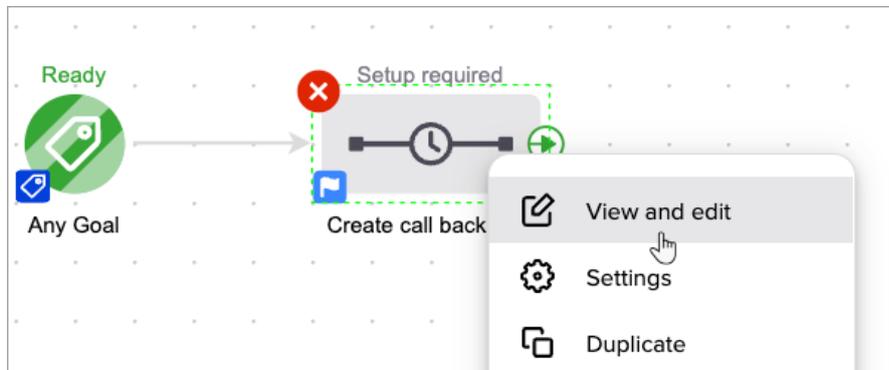
3. Give your automation a unique Name for your automation and a category (optional) followed by **"Save"**



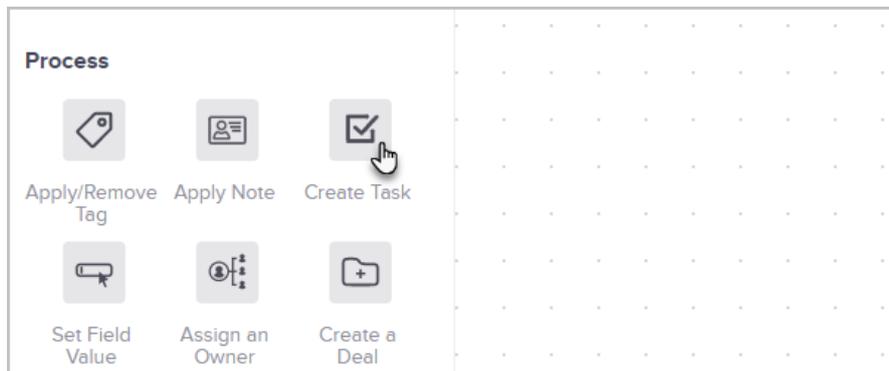
4. Connect any **"Goal"** that will be used to start the automation to create the task and connect to a **"Sequence"**



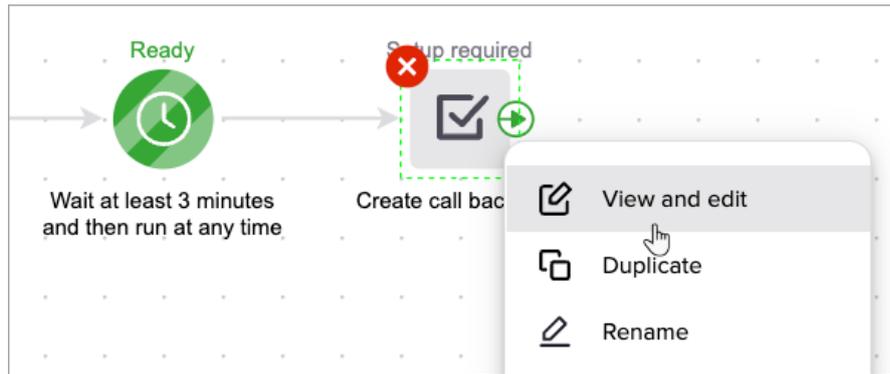
5. Click the **"Sequence"** followed by **"View and edit"**



6. Drag and drop a **Create Task** object onto the canvas.



7. Click **"Create Task"** process followed by **"View and Edit"**

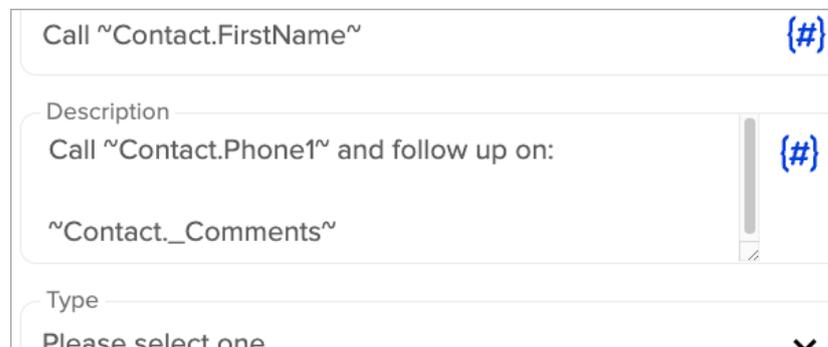


8. Enter the **task title** and **description**.

- The **Title** is displayed on the user's task list. Use **"#"** to access **"Merge fields"** to personalize your task.

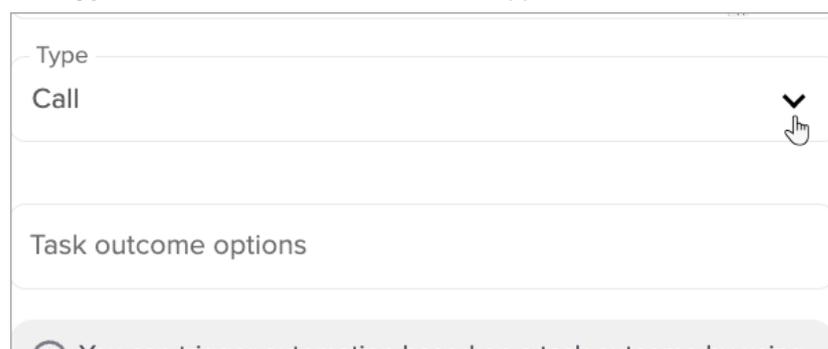


- The **Description** provides additional details when the user clicks on the title to view the task details.



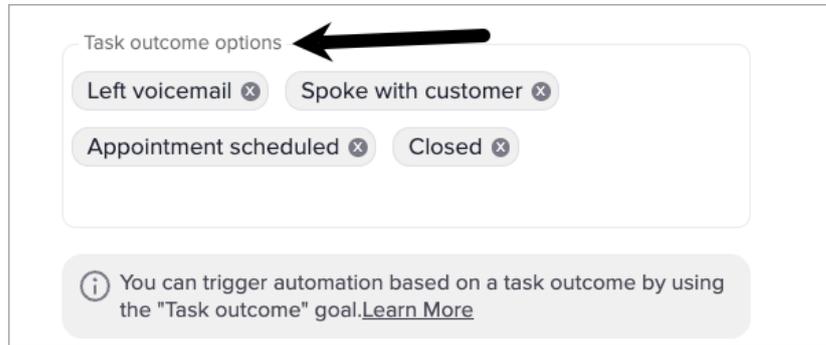
This could contain instructions, a script, or a list of "to do" items related to this task.

- The **Type** for the task, such as call, email, appointment, fax, or letter.



9. Next Identify **task outcome options** for this task, assign the task, and set a due date and time

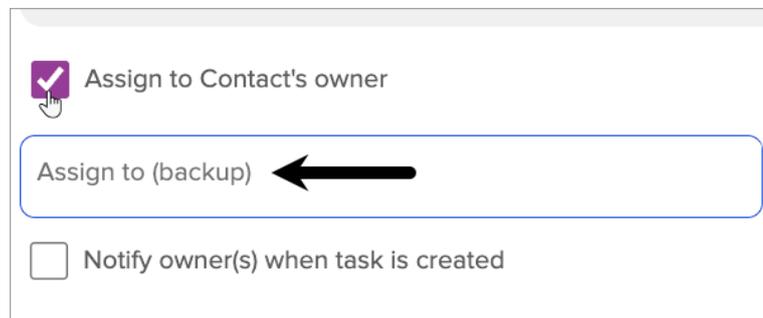
- Task outcome options



The screenshot shows a 'Task outcome options' section with a black arrow pointing to the title. Below the title are four buttons: 'Left voicemail' (with an 'x' icon), 'Spoke with customer' (with an 'x' icon), 'Appointment scheduled' (with an 'x' icon), and 'Closed' (with an 'x' icon). Below these buttons is an information box with an 'i' icon and the text: 'You can trigger automation based on a task outcome by using the "Task outcome" goal. [Learn More](#)'

- Assign the task:

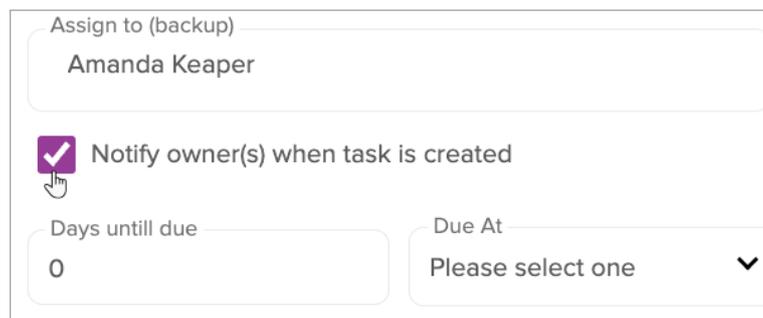
- **Assign to Contact's owner:** Check the box if you want the user who is the assigned owner of the contact record to complete this task (e.g. sales rep.)
- **Assign to (backup):** Select a backup user from the drop-down. This setting assigns a specific user to complete this task or assigns it to this user if no owner has been assigned to a contact.
- **Remove the assign to (Backup) & Replace:** Select the dropdown and click the backspace key to remove the user. Then Start typing the name of the user you want to replace the backup with.



The screenshot shows the 'Assign the task' section. It has a checked checkbox for 'Assign to Contact's owner'. Below it is a dropdown menu with 'Assign to (backup)' selected, indicated by a black arrow. At the bottom is an unchecked checkbox for 'Notify owner(s) when task is created'.

- Notify the Owner when the task is created:

- Check the box to have a notification sent to the Owner an email notifications

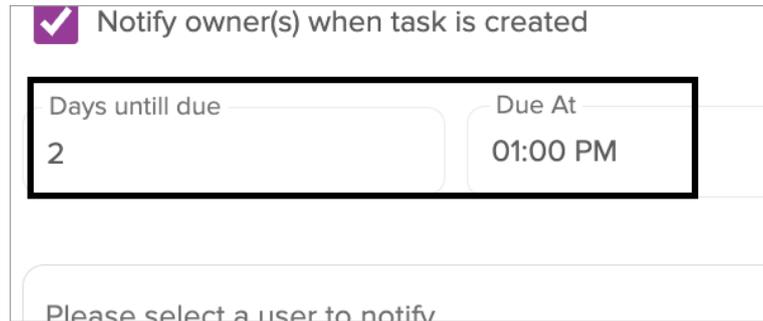


The screenshot shows the 'Notify the Owner when the task is created' section. It has a checked checkbox for 'Notify owner(s) when task is created'. Below it is a dropdown menu with 'Assign to (backup)' selected and 'Amanda Keeper' displayed. At the bottom are two input fields: 'Days until due' with the value '0' and 'Due At' with a dropdown menu showing 'Please select one' and a downward arrow.

- Set a **due date, time,** and **priority.** The due date is different from the

assign date.

- The task is created and assigned *based on the sequence timer* before it in the sequence.
- The **due date** is used to determine whether the task has been completed on time or is overdue.



✓ Notify owner(s) when task is created

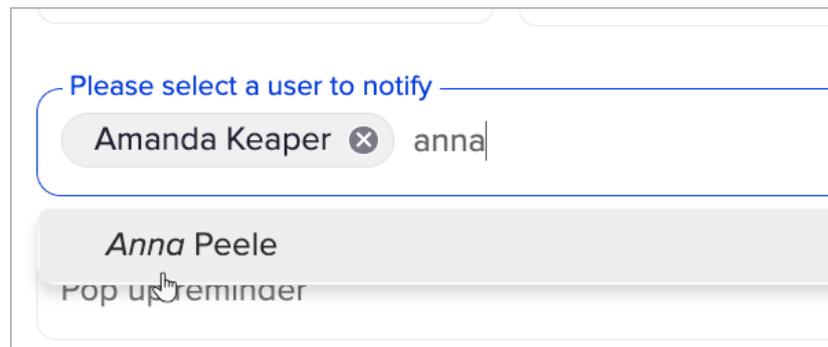
Days until due: 2

Due At: 01:00 PM

Please select a user to notify

10. **Select additional users to notify (Optional)**

- Set up email notifications by
 - Typing the users name in the field
 - Or by blocking on a name to select a user.
- Repeat the process to add more user notifications. Every time the sequence creates a task, these users will receive an email.

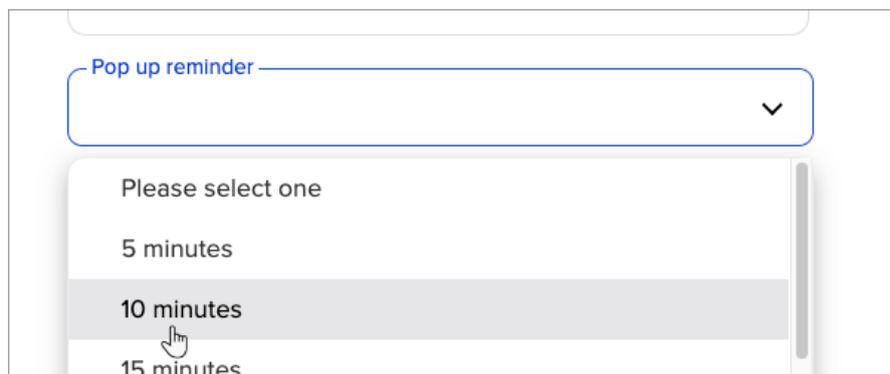


Please select a user to notify

Amanda Keeper × anna

Anna Peele
pop up reminder

11. **Pop up reminder (Optional):** A browser pop-up will be triggered to remind the owner and users of the tasks approaching due date.



Pop up reminder

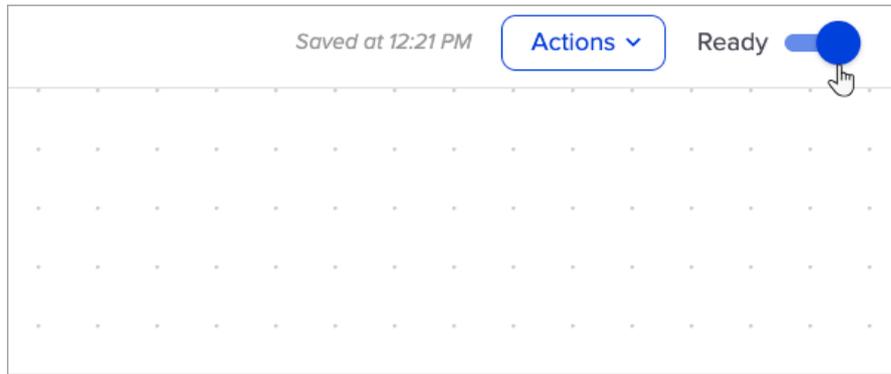
Please select one

5 minutes

10 minutes

15 minutes

12. Set the task **priority**, which is used to set the urgency level of the task.



15. You are now ready to publish your changes.

