

## CHAPTER 6: TASK MANAGEMENT

This chapter contains the following sections:

- Introduction to Task Management
- Setting Up Teams and Activities
- Creating To-dos
- Assigning Activities
- Creating Recurring To-dos
- Modifying To-dos
- Converting Team To-dos
- Sending E-Mail Meeting Invitations
- Closing, Canceling and Deleting To-dos
- Viewing Statistical Information About To-dos
- Exercises

### Introduction to Task Management

In the Sales & Marketing application area, there are a number of tools you can use to manage your tasks. You can set up to-dos (individual or team tasks) and activities (groups of tasks) to be completed, and you can also assign them to individual salespeople or teams of salespeople. These features are integrated with the other parts of the application area, so that you can create interactions when to-dos are actually carried out, and you can associate the to-dos with contacts and campaigns. The program suggests that you create a follow up to-do when a Sales Quote is printed. You can also ensure that the to-do is carried out for entire segments.

#### Activities

Activities are large tasks that can be broken down into several smaller tasks or to-dos. By setting up activities, you can create a number of to-dos much more quickly than if you created them individually. Once you have set up an activity, you use a wizard to assign the corresponding to-dos to salespeople, teams, contacts, campaigns, or segments.

#### To-dos

To-dos are individual or team tasks. You can create to-dos within activities or individually. There is a card for each to-do, which contains a variety of information about the task. To-dos can be of the type Meeting, Phone Call, or Blank. To-dos of the type Meeting may contain multiple participants. You can associate to-dos with contacts, salespeople or teams, campaigns, opportunities and segments, and you can assign each to-do a priority level and a status. You can mark a to-do as closed if it is completed or canceled, if it is no longer relevant, and/or if you want to delete it.

You can create recurring to-dos, that is, tasks that must be repeated at intervals.

In the To-dos window you can view information about to-dos. You can customize this window to give you precisely the information you are looking for.

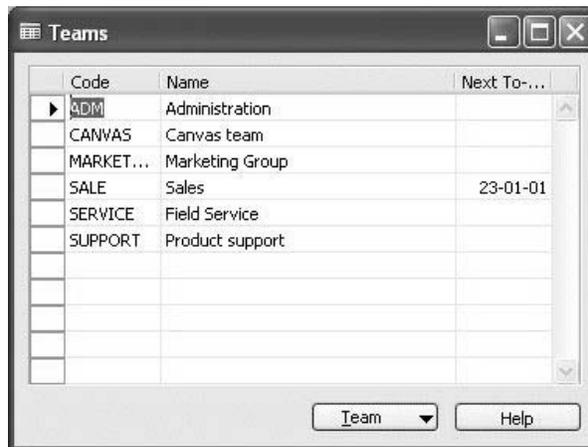
### Setting Up Teams and Activities

A team is a group of salespeople created for a specific purpose, such as marketing, internal audit, or some other specific function within the organization. You use teams to keep track of who is involved in completing tasks. A team does not need to contain salespeople.

#### Setting Up Teams

There are two steps to setting up a team: setting up the team itself, and assigning salespeople to the team. To set up a team and assign salespeople to it, follow this procedure:

1. Click SALES & MARKETING→SALES→TEAMS. The Teams window should appear:



2. Press F3 to create a new line.
3. In the **Code** field, enter a code for the new team.
4. In the **Name** field, enter a name for the new team.
5. Click in the line with the team you have just created, and then click TEAM→SALESPEOPLE. The Team Salespeople window should appear:



6. In the **Salesperson Code** field, click the **AssistButton** to see a list of salespeople, and select the desired salesperson. The salesperson's name should appear in the **Salesperson Name** field.
7. Repeat the procedure for each salesperson you want to add to the team. You can add as many salespeople as necessary.

## Deleting Teams

If a team is no longer relevant, you can delete it. Follow this procedure:

1. Click SALES & MARKETING→SALES→TEAMS. The Teams window should appear.
2. Select the line with the team you want to delete.
3. Press F4.
4. A message should appear asking you to confirm the deletion. Click **Yes**.

The to-dos related to this team are not deleted. You have to cancel and delete them manually later.

## Setting Up Activities

Activities are large tasks that consist of several to-dos. You set up an activity and the to-dos that make up that activity in the Activity window. You can assign each to-do a type, priority, and date formula. The date formula ensures that the to-do shows up in the To-Dos window under the correct date.

To set up an activity, follow this procedure:

1. Click SALES & MARKETING→SETUP→TO-DO ACTIVITIES. The Activity window should appear.

T..	Description	P..	Date Formula
	Est. customer needs	L..	
▶	Set up meeting	N..	+3D
	Go through expectations and needs	H..	+2W
	Verify/change customer needs	N..	+3W

2. Place the cursor in the **Code** field, and press F3 to get a blank card.
3. In the **Code** field, enter a code for the new activity.
4. In the **Description** field, enter a description of the activity.
5. In the **Type** field, select the type of the first to-do included in the activity. If the to-do is not a meeting or a phone call, then leave the field blank.

6. In the **Description** field, enter a description of the to-do and in the **Priority** field, select a priority for the to-do.
7. In the **Date Formula** field, enter a date formula for the program to use in order to calculate when the activity step should be completed. The program calculates the date by which the step should be completed from the date on which the activity was assigned. Date formulas must conform with a number of rules.

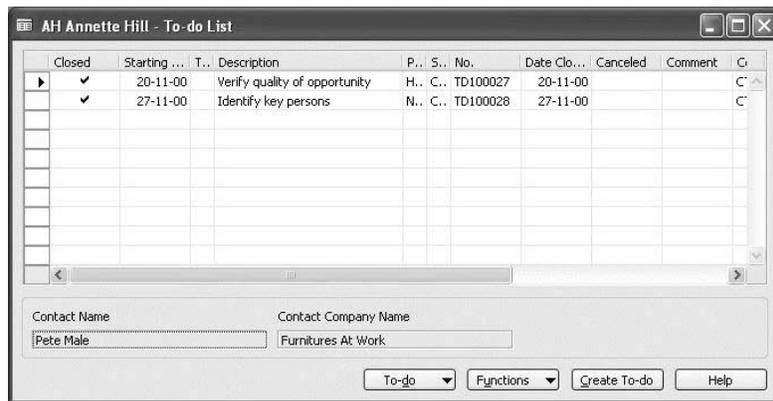
There is a line for each to-do associated with the activity, and you can include as many to-dos as you like.

## Creating To-dos

You can create to-dos for all the tasks that you want to assign to salespeople or teams. You can also assign contacts to these to-dos. You can only assign to-dos to employees recorded in the program as salespeople.

You create to-dos from the To-do List window. Depending on where you open the To-do List window from, the window shows to-dos either for contacts, salespeople, campaigns, segments, or teams. The following procedure shows how to create a to-do from the salesperson card.

1. Click SALES & MARKETING→SALES→SALESPeOPLE.
2. On the salesperson card, select the salesperson to be assigned the to-do, and then click SALESPERSON→TO-DOS.



3. In the To-do List window, click **Create To-do**. The Create To-do wizard should appear.
4. Fill in the mandatory fields and any relevant optional fields in the first window of the wizard, and click **Next**.

The **Description** field is a mandatory field and must be filled in before you can click **Next**. For to-dos of the type Meeting, you must also fill in the **Starting Time** field and the **Duration** field if the to-do is not an all-day event.

5. If you are creating a to-do of the type Meeting and would like to send meeting invitations to the attendees, then in the second wizard window you may select the template and language code for the e-mail invitations. The **Attachment** field shows whether the invitation for this to-do has an attachment. To view and edit the attachment, click the **AsisstButton** in the field.

Attachments are only available when sending invitations to attendees of the type Contact. Attendees of the type Salesperson will receive a customized e-mail message.

You cannot create an attachment on the wizard. You can only modify them. If you want to create an attachment, you will have to create a new interaction template with a new attachment and use it on the wizard.

6. Specify meeting attendees, and fill in the fields for each attendee. You can select them from among contacts and salespeople:



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**NOTE:** When Information about the to-do organizer cannot be changed or deleted, this salesperson is set as the to-do organizer since the to-do is created from the Salesperson Card.

The Show Calendar option is only available for attendees of the type Salesperson who have enabled synchronization with Microsoft® Outlook®.

The Send Invitation option is only available for contacts and salespeople with an e-mail address. A to-do must contain an attachment if you want to send invitations to attendees of type Contact.

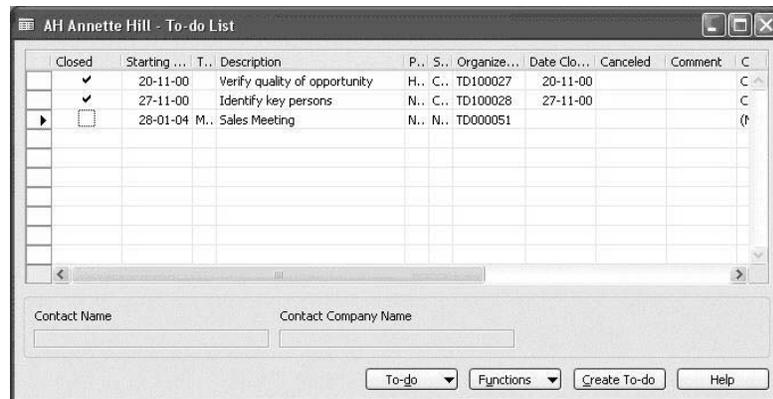
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7. If the type of the to-do is Blank or Phone Call, then in the second wizard window, the **Salesperson Code** field will be filled in automatically with the code of the salesperson you created the to-do for

**NOTE:** If the to-do has been created somewhere other than the Salesperson Card, you must fill in the **Salesperson Code** field or the **Team Code** field before you can click **Next** or **Finish**.

8. Fill in the other relevant fields in the following wizard windows.

When you have completed the Create To-do wizard, the to-do should appear in the salesperson's To-do List window:



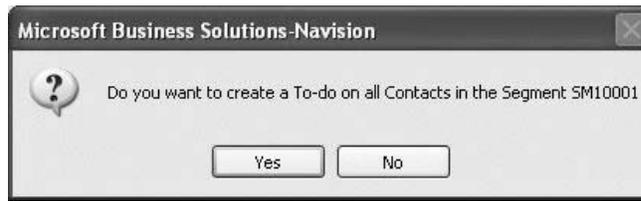
This to-do also should appear in the to-do lists of invited Attendees (salespeople and contacts).

When you create a to-do and assign it to a team, it is possible to see this to-do from the to-do lists of salespeople that are members of that team. The to-do will also be visible from the team's to-do list.

It is possible to create to-dos for a segment. To do this, follow this procedure:

1. Click SALES & MARKETING→MARKETING→SEGMENTS. Find the segment that you need to create a to-do for.
2. Click SEGMENT→TO-DOS. The to-do list window should appear.
3. Click **Create To-do**, and follow the wizard instructions. If you are creating a to-do of type Meeting, the program will add all contacts from this segment to the attendee list for this to-do.

4. Click **Finish**, and confirm the following message:



If you click **No**, the to-do will not be created.

If you are creating a to-do of type Blank of Phone Call, the program will create one to-do per contact in the segment. If you are creating a to-do of type Meeting, the program will create one to-do in which all the contacts in the segment will be the meeting attendees.

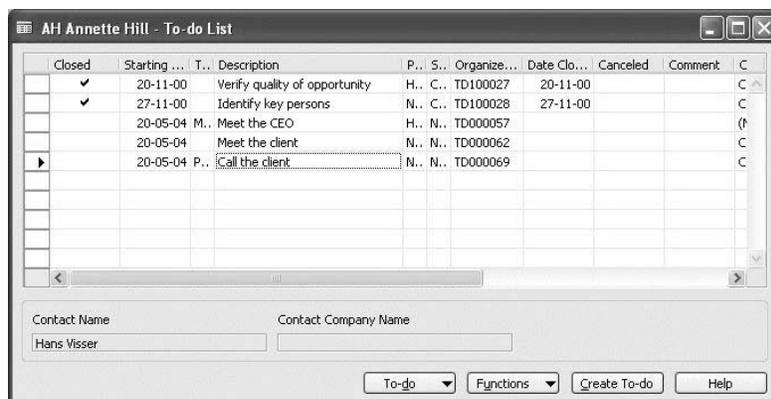
There is another place in the program from which to-dos can be created. When you print a sales quote, the program offers to create a follow up-to do. For example, you can create a to-do to remind you to call a customer and follow up on the quote.

## Delegating To-dos

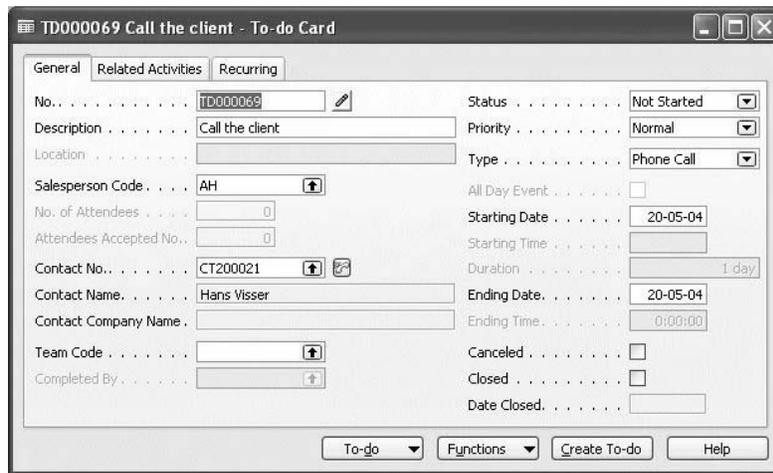
You can delegate a to-do to another salesperson or team. For example, do this if the salesperson or team to which it has been assigned cannot complete it.

You can delegate to-dos from the To-do Card window. Depending on where you access the To-do List window from, the window shows to-dos either for contacts, salespeople, campaigns, segments, or teams. The following procedure shows how to delegate a to-do to a salesperson.

1. Click SALES & MARKETING→SALES→SALESPeOPLE.
2. Browse to the salesperson card for the salesperson the to-do has been assigned to, and click SALESPERSON→TO-DOS.



- In the To-do List window, select the to-do you want to delegate and click TO-DO→CARD. The to-do card should appear.



- To delegate the to-do to another salesperson, click the **AssistButton** to the right of the **Salesperson Code** field, and select the desired salesperson. The program automatically transfers the to-do from one salesperson to the other. To delegate the to-do to another team, click the **AssistButton** to the right of the **Team Code** field, and select the desired team.

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***NOTE:** You cannot change the Salesperson Code for to-dos of type Meeting, because this salesperson is a to-do organizer.*

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You cannot delegate a to-do to both a salesperson and a team. If you enter a salesperson code, the program automatically clears the **Team Code** field. If you enter a team code, the program automatically clears the **Salesperson Code** field. You cannot remove both the Salesperson and Team Code from the To-do Card – you must specify at least one of them.

## Assigning Activities

You can assign large tasks (activities) composed of several to-dos to salespeople or teams. Only employees recorded as salespeople in the program can be assigned activities.

You can assign activities from the To-do List window. Depending on where you access the To-do List window from, the window shows to-dos either for contacts, salespeople, campaigns, segments, or teams. The following procedure shows how to assign activities from the contact card.

- Click SALES & MARKETING→MARKETING→CONTACTS.

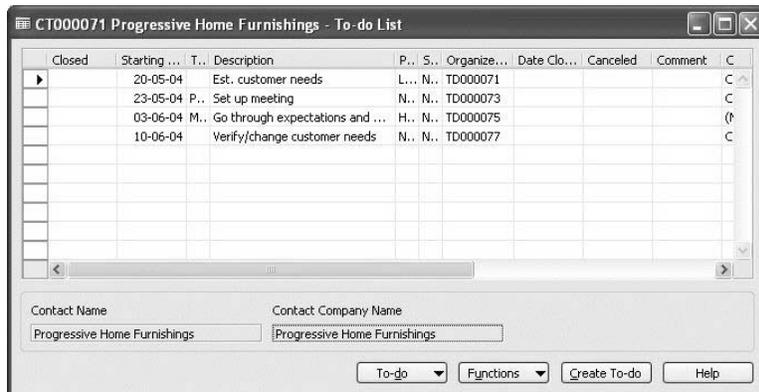
# Microsoft Navision Relationship Management

2. Find the contact you want to assign the activity to, and then click CONTACT→TO-DOS. The To-do List window should appear:

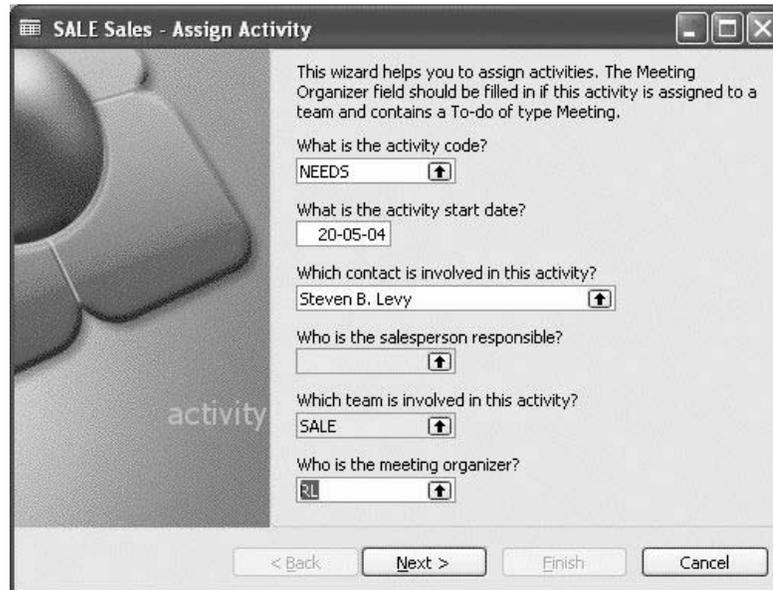


3. Click FUNCTIONS→ASSIGN ACTIVITIES. The Assign Activities wizard should appear.
4. Fill in the mandatory fields and any relevant optional fields.

When you click **Finish**, the program automatically assigns all the to-dos within the activity to the contact:



If you assign an Activity to a team, and this Activity contains to-dos of type Meeting, you must specify a to-do organizer on the first page of the wizard.



If you assign this kind of Activity to a salesperson, the to-do organizer will be the salesperson selected in the **Salesperson Code** field on the first page of the wizard.

## Creating Recurring To-dos

You can create recurring to-dos for tasks that occur periodically. You specify that a to-do is recurring either on the last page of the Create To-do wizard or on the **Recurrence** tab of the To-do Card after the to-do has been created. To specify that a to-do is recurring, you must:

1. Insert a check mark in the **Recurring** field.
2. Specify a date formula in the **Recurring Date Interval** field.
3. Specify the date the program will use as the first due date.

Now, when you close or cancel the to-do, the following message will appear:



A new to-do will be created.

## Example: Creating Recurring To-dos

You decide that the to-do Identify key persons should be a recurring to-do, performed each month. This to-do is targeted at contact CT200107, Pete Male. You make this change on the to-do card:

1. Click SALES & MARKETING→MARKETING→CONTACTS, and then find the contact card for Pete Male.
2. Click CONTACT→TO-DOS.
3. Select the relevant to-do on the list, and click TO-DO→CARD. The to-do card should appear:

The screenshot shows the 'TD100028 Identify key persons - To-do Card' window with the 'General' tab selected. The fields are as follows:

No.	TD100028	Status	Completed
Description	Identify key persons	Priority	Normal
Location		Type	
Salesperson Code	AH	All Day Event	<input type="checkbox"/>
No. of Attendees	0	Starting Date	27-11-00
Attendees Accepted No.	0	Starting Time	
Contact No.	CT200107	Duration	1 day
Contact Name	Pete Male	Ending Date	27-11-00
Contact Company Name	Furnitures At Work	Ending Time	0:00:00
Team Code		Canceled	<input type="checkbox"/>
Completed By		Closed	<input checked="" type="checkbox"/>
		Date Closed	27-11-00

4. Click the **Recurring** tab, and select the check box in the **Recurring** field. Now you can enter information in the other fields on the tab.
5. Fill in the other two fields with the appropriate information. The **Recurring** tab will then look like this:

The screenshot shows the 'TD100028 Identify key persons - To-do Card' window with the 'Recurring' tab selected. The fields are as follows:

Recurring	<input checked="" type="checkbox"/>
Recurring Date Interval	+1M
Calc. Due Date From	Closing Date

## Modifying To-dos

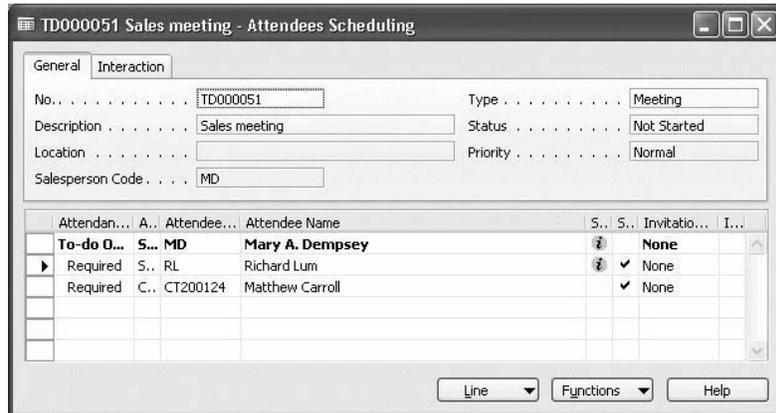
Sometimes you may need to modify a to-do in order to link it to a contact or to change its priority level or status. You modify a to-do by changing the relevant information on the to-do card.

### Modifying To-dos of the Type Meeting

If you need to add, delete, or change an attendee for a to-do of the type Meeting or change the attachment that will be sent to attendees as a meeting invitation, you can do this from the Attendee Scheduling card for that to-do.

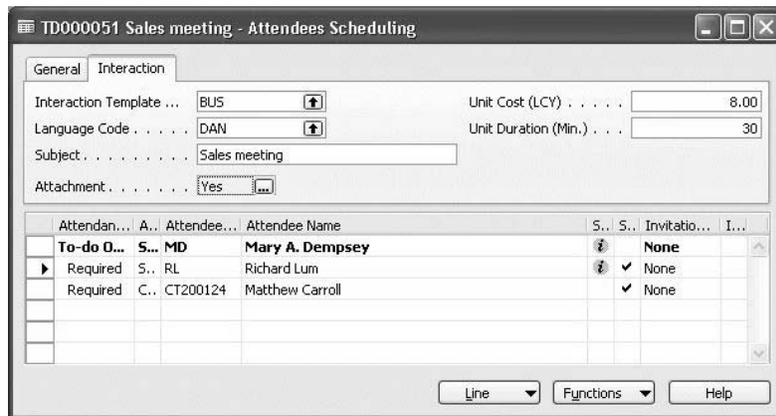
To modify to-do attendees, do the following:

1. Click SALES & MARKETING→SALES→SALESPeOPLE, and find the salesperson card for the salesperson that created the to-do.
2. Click SALESPERSON→TO-DOS, and select the to-do of the type Meeting which you want to modify.
3. Click TO-DOS→ATTENDEE SCHEDULING. The Attendee Scheduling card looks like this:



4. Add, delete, or replace the to-do attendees. The to-do organizer is displayed in bold in the first line of the Attendee Scheduling card and cannot be changed.

5. To change the attachment for the to-do, go to the **Interaction** tab, and click the **AssistButton** to the right of the **Attachment** field.



## Converting Team To-dos

Sometimes you may need to reassign a team to-do to a single salesperson, that is, to convert a team to-do into a salesperson to-do or vice versa.

### Converting Team To-dos into Salesperson To-dos

To convert a team to-do into a salesperson to-do, do the following:

1. Click SALES & MARKETING→SALES→TEAMS.
2. In the Teams window, select the team whose to-do you want to convert into a salesperson to-do, and then click TEAM→TO-DOS. The To-do List window should appear.
3. Select the to-do you want to convert into a salesperson to-do, and click TO-DO→CARD.
4. On the to-do card, click the **AssistButton** in the **Salesperson Code** field.
5. Select the salesperson to whom you want to reassign this to-do and click **OK**.
6. Confirm the subsequent message.
7. For to-dos of type Blank and Phone Call, a notification will be sent to team members who have selected the **Notify me of team to-do changes** check box on their salesperson cards and have an e-mail address filled in.

When a team to-do of the type *Meeting* is converted into a salesperson to-do, the list of meeting attendees is copied from the team to-do attendee list. The assigned salesperson then becomes the meeting organizer, while the meeting organizer of the initial team to-do becomes a meeting attendee.

### Converting Salesperson To-dos into Team To-dos

1. Click SALES & MARKETING→SALES→SALESPEOPLE.
2. On the salesperson card, select the salesperson whose to-do you want to convert into a team to-do, and then click SALESPERSON→TO-DOS. The To-do List window should appear.
3. Select the to-do you want to convert into a team to-do, and click TO-DO→CARD.
4. On the to-do card, click the **AssistButton** in the **Team Code** field.
5. Select the team to which you want to reassign this to-do and click **OK**.
6. For to-dos of type Blank and Phone Call, a notification will be sent to team members who have selected the Notify me of team to-do changes check box on their salesperson cards and have an e-mail address filled in.

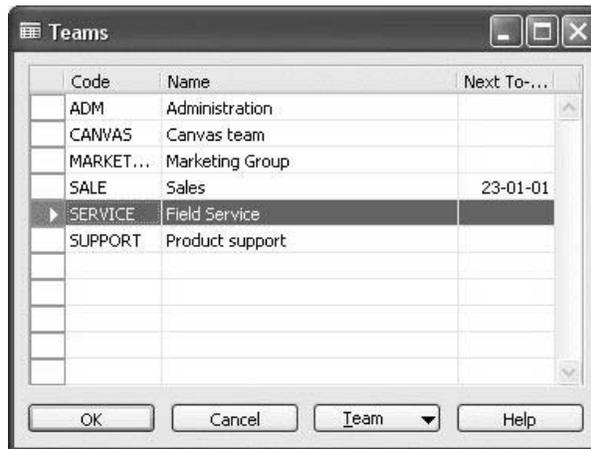
If you convert a salesperson to-do of type Meeting into a Team To-do, then salespeople included in the new team will be assigned to this to-do as attendees. The to-do organizer will not be changed.

### Reassigning a Team To-do to Another Team

To reassign a team to-do to another team, do the following:

1. Click SALES & MARKETING→SALES→TEAMS.
2. In the Teams window, select the team whose to-do you want to reassign to another team, and then click TEAM→TO-DOS. The To-do List window should appear.
3. Select the to-do you want to reassign to another team, and click the TO-DO→CARD.
4. On the to-do card, click the **AssistButton** in the **Team Code** field.

5. Select the team you want to reassign this to-do to, and click **OK**.



6. Confirm the subsequent message.

A notification will be sent to team members who have selected the **Notify me of team to-do changes** check box on their salesperson cards and have an e-mail address filled in.

If you reassign a team to-do of type Meeting to another team, then salespeople included in the new team will be assigned to this to-do as attendees. The to-do organizer will not be changed.

## Sending E-Mail Meeting Invitations

You can send meeting invitations in one of the following ways.

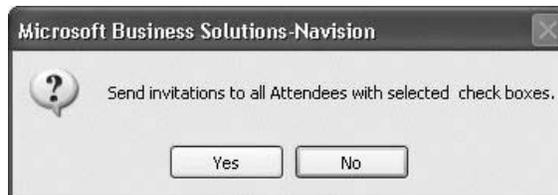
If you have enabled synchronization with Microsoft Outlook, you can send attendees a standard meeting request in Outlook with a meeting invitation attachment inserted (if it is defined for this to-do). This will also enable you to receive the accepted/declined/tentative responses from meeting attendees. For more information about integrating Microsoft® Business Solution–Navision® to-dos and contacts with Outlook tasks, calendar items, and contacts, see “Outlook Integration.”

### Sending E-mail Invitations Using E-mail

You can also send meeting invitations without enabling synchronization with Outlook. In this case, an attendee will not receive an Outlook meeting request, but will rather receive an e-mail message in his or her Inbox, informing him or her of the meeting. If you send meeting invitations in this way, you will not be able to receive the accepted/declined/tentative notifications from the attendee.

To send a meeting invitation, do the following:

1. Click SALES & MARKETING→SALES→SALESPeOPLE. Go to Salesperson, List, select the salesperson that created the to-do, and click **OK**.
2. On the salesperson card, click SALESPERSON→TO-DOS.
3. In the To-do List window, select the to-do for which an invitation must be sent and click TO-DO→CARD.
4. On the to-do card, click TO-DO→ATTENDEE SCHEDULING.
5. Select the check box in the **Send Invitations** field for attendees you want to send an invitation to (by default this check box is selected for every attendee with an e-mail address), and click FUNCTIONS→SEND INVITATIONS. Confirm the subsequent message.



6. If you have already sent invitations to the attendees and would like to resend them, click FUNCTIONS→SEND INVITATIONS, and confirm the subsequent message.



7. If you have not sent invitations to some attendees or added new ones and would like them to receive an invitation, select the **Send Invitation** fields for those attendees, and then click FUNCTIONS→SEND INVITATIONS. The following message should appear:



8. Select the appropriate option and click **OK**.

9. Confirm the subsequent messages that ask to give Microsoft Navision permission to access an e-mail address stored in Outlook to send the e-mail on your behalf.

In order to send an invitation to attendees of the Contact type, the to-do must contain an attachment. Invitations can only be sent to those attendees for whom an e-mail address is specified. You can add or edit an attendee's e-mail in the Salesperson/Purchaser Card or Contact Card.

Attachments are only available for attendees of the Contact type. The following customized text will be sent to attendees of the Salesperson type:

Dear [SP Name],  
You are cordially invited to attend the meeting, which will take place on [date] at [time].  
Yours sincerely,  
[Meeting Organizer's Name]  
[date sent] [time sent]

You cannot modify this text.

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**NOTE:** When an invitation is sent, a check mark for that attendee should appear in the **Invitation Sent** field.

A log entry is created in the Interaction Log Entries table for all Contacts to whom invitations were sent.

Send Invitation is not available for the Meeting Organizer.

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## Closing, Canceling, and Deleting To-dos

You can mark completed to-dos as closed. Once you have done so, you can, for example, choose to view only current to-dos in a To-dos window. If a to-do is no longer relevant, you can cancel it. If you have many to-dos that are canceled, you may want to delete some or all of them.

### Closing or Canceling Salesperson To-dos

To close or cancel a to-do, follow this procedure:

1. Click SALES & MARKETING→SALES→SALESPEOPLE.
2. On the salesperson card, select the salesperson whose to-do you want to close or cancel, and then click SALESPERSON→TO-DOS. The To-do List window should appear.
3. Select the to-do you want to close or cancel.
4. Click TO-DO→CARD.

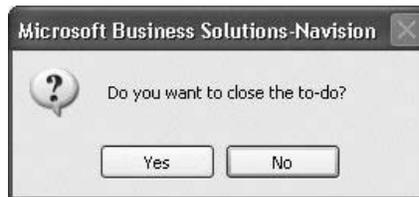
5. Select the check box in the **Closed** field or in the **Canceled** field.

If you select the check box in the **Closed** field, you will be prompted for a reply about whether or not you want to register the interaction in the Interaction Log Entries. If you click **Yes**, the Create Interaction wizard should appear. Fill it out.

### Closing Team To-dos

To close a team to-do, follow this procedure:

1. Click SALES & MARKETING→SALES→TEAMS.
2. In the Teams window, select the team whose to-do you want to close, and then click TEAM→TO-DOS. The To-do List window should appear.
3. Select the to-do you want to close and click TO-DO→CARD.
4. On the to-do card, click the **AssistButton** in the **Completed By** field.
5. Select the salesperson that completed this to-do and click **OK**.
6. Clicking **Yes** in the message box that should appear will close the to-do.



When closing a team to-do, you are given the option to register an interaction log entry for this to-do.

For to-dos of type Blank and Phone Call, a notification will be sent to team members who have selected the Notify me of team to-do changes check box on their salesperson cards and have an e-mail address filled in.

### Deleting To-dos

You can only delete canceled to-dos. You use filters to choose which to-dos to delete. Follow this procedure:

1. Click ADMINISTRATION→IT ADMINISTRATION→DATA DELETION→DELETE CANCELED TO-DOS. The Delete To-dos window should appear:



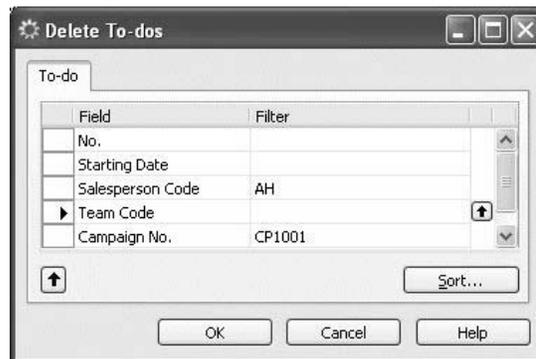
2. In the **Field** field, add or remove filters to select the criteria you want to use to delete a to-do.
3. In the **Filter** field, click the **AssistButton** to the right of the field to see the canceled to-dos.
4. Select the to-do that you want to delete and click **OK**.

After you have deleted a to-do, the program automatically removes it from the To-dos window.

## Example: Deleting To-dos

Annette Hill (AH) has a large number of completed to-dos. You want to delete those for campaign CP1001, Increase sale.

To delete the to-dos, first cancel each to-do, then fill in the Delete To-dos window like this:



## Viewing Statistical Information about To-dos

You can view information about to-dos in several different windows. We have already reviewed the To-do List window, which lists the to-dos for a specific team, contact, salesperson, segment or campaign, and the to-do card, containing all the details about a specific to-do.

You can view statistics about to-dos in the To-dos window. You open the window by clicking SALES & MARKETING→SALES→TO-DOS:

No.	Name	1/2003	2/2003	3/2003	4/2003	1/2004
▶ AH	Annette Hill		1			
DC	Debra L. Core		2			
JR	John Roberts		5			
MD	Mary A. Dempsey		2			
PS	Peter Sadow		1			
RL	Richard Lum		2			

The window has two tabs at the top and lines at the bottom. On the **General** tab, you can select whether to view the number of to-dos by salesperson, team, contact, or campaign. On the **Filters** tab you can set different filters to ensure that you view statistics only for those to-dos you are interested in.

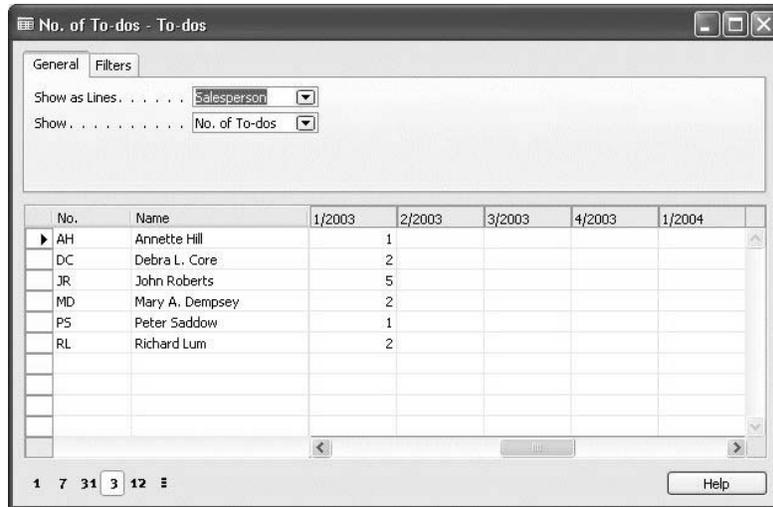
The lines are divided into two sections, with the categories (salesperson, team, contact, or campaign) on the left and the number of to-dos divided into periods on the right. You can select the time period (day, week, month, quarter, year) in the bottom left-hand corner using the interval buttons.

### Example: Viewing Information About To-dos

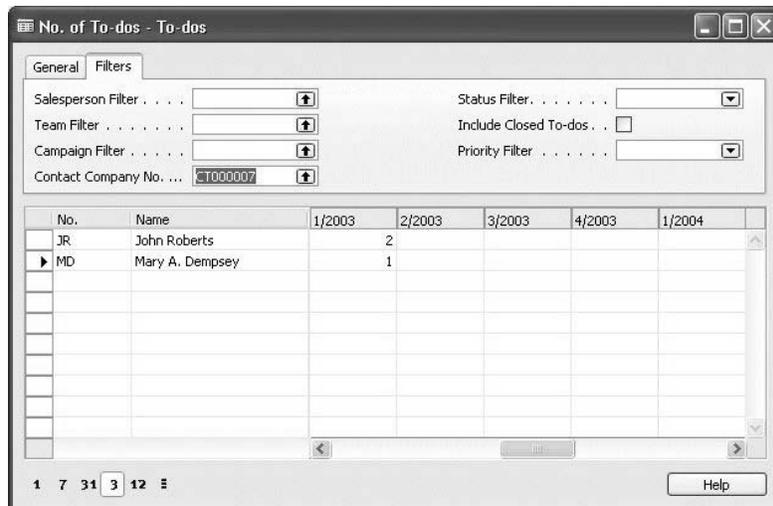
You want to see how many to-dos relate to contact company CT000007, Progressive Home Furnishings. Follow this procedure:

1. Click SALES & MARKETING→SALES→TO-DOS.
2. Click the **General** tab.
3. In the **Show as Lines** field, select Salesperson.

4. In the **Show** field, select No. of To-dos. The window will look something like this (depending on which interval has been selected in the bottom left-hand corner and which dates are displayed in the lines on the right):



5. On the **Filters** tab, in the **Contact Company No.** field, click the **AssistButton**, and select the line with Progressive Home Furnishings. The window now looks something like this:



You can see the number of to-dos by salesperson that relate to the contact company, Progressive Home Furnishings.

## Test Your Skills – Creating a Recurring To-do

**Scenario:** As a sales manager, you have the weekly task of checking the performance of your sales reps. Create this recurring to-do.

## Test Your Skills – Creating Teams of Salespeople

**Scenario:** You want to create a new team of salespeople to work on promoting the Millennium Bicycle series, and you would like one of your salespeople, Debra L. Core, to send a letter to Patrick Dalle from Lovaina Contractors.

1. Create a new team (the Millennium Promotion team) to work on promoting the Millennium Bicycle series. Include Annette Hill, Debra L. Core, Peter Sadow, and Richard Lum in the team.
2. Assign Debra L. Core a to-do to send a letter to Patrick Dalle from Lovaina Contractors, with detailed information about the Millennium bicycle series.
3. Create an interaction for the to-do that you have just assigned. You can do this from the salesperson/purchaser card for Debra L. Core or from the contact card for Patrick Dalle from Lovaina Contractors.

## Test Your Skills – Assigning Activities

**Scenario:** You want to assign a new activity (producing a brochure about the Millennium bike) to the new team and then delegate the to-dos in the activity from the team to the individual salespeople.

1. Set up an activity that is consists of five to-dos to create a brochure promoting the Millennium bicycle series for Lovaina Contractors. Make up your own to-dos or use these: analyze market data, prepare brochure text, meet with designer, meet with printer, and send brochure and cover letter.
2. Assign the activity to the Millennium promotion team.
3. Delegate the to-dos in the activity from the team to the individual team members, making sure that two of the to-dos are delegated to Debra L. Core.

## Test Your Skills – Deleting Closed To-dos

**Scenario:** Later, you want to view the details of the to-dos of particular salespeople in the team, and you also want to delete some of the closed to-dos.

1. Find out how many to-dos Debra L. Core and John Roberts have in the first quarter of 2001, and view the number of to-dos by priority.
2. Debra L. Core has several closed to-dos. Delete the ones dated November 18, 2000.

## Test Your Skills – Adding to a To-do of the Meeting Type

You want to add an attendee to a to-do of the type meeting that you have already created.

1. Create a to-do of the type meeting with Annette Hill as the to-do organizer and with Richard Lum and Yvonne McKay (CT 100160) as the meeting attendees.
2. Add Ann Beebe (CT 100209) as a new attendee.

## Test Your Skills – Sending E-Mail Meeting Invitations Using MAPI

**Scenario:** Create a meeting to-do with Annette Hill as the to-do organizer and with Richard Lum and Yvonne McKay (CT 100160) as the meeting attendees.

Do not send meeting invitations when finishing the Create To-do wizard. After the to-do is created, send invitations using MAPI (while not synchronized with Outlook).

Later, you learn that Yvonne McKay has not received your invitation. Resend the invitation to her.

## Quick Interaction: Lessons Learned

Take a moment to write down three Key Points you have learned from this chapter:

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2.

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3.

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