## Automatically create a task in a sequence

Last modified on: 07/07/2025 10:35 am MST

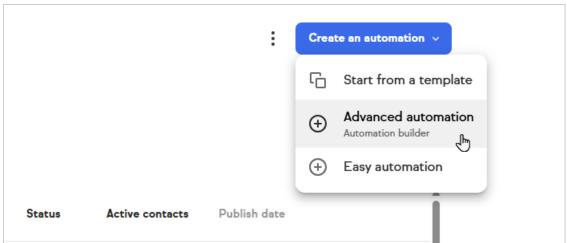
Tags: Tasks Campaign Sequence Keap-Pro Keap-Max

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.

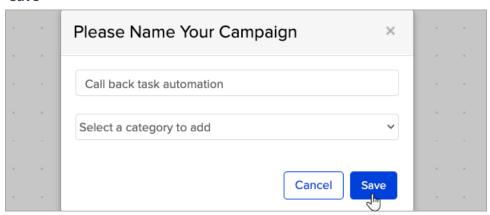
**Remember!** Each task object must be configured individually. They cannot be re-used in multiple sequences or at more than one point in the same sequence. Task objects are not archived. If you delete a task object from a sequence, it can only be restored if you restore a previous version of the entire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

## Create a task with Advanced Automation

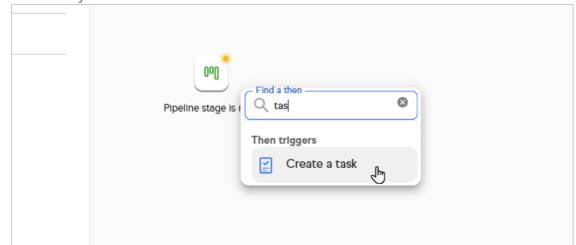
- 1. Click on **Automations** in the left-hand menu.
- 2. Click the button to create a new automation and choose **Advanced Automation**.

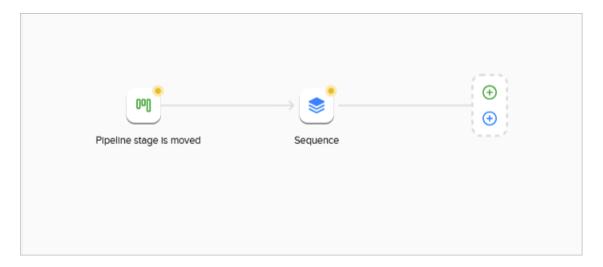


3. Give your automation a unique Name for your automation and a category (optional) followed by "Save"

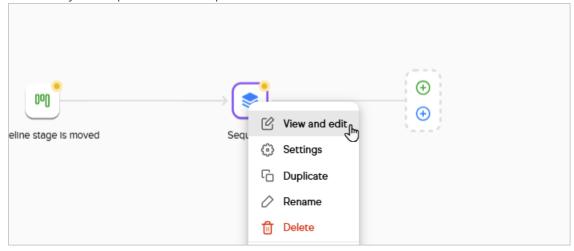


4. Connect any "When" that will be used to start the automation to create the task and add a Task

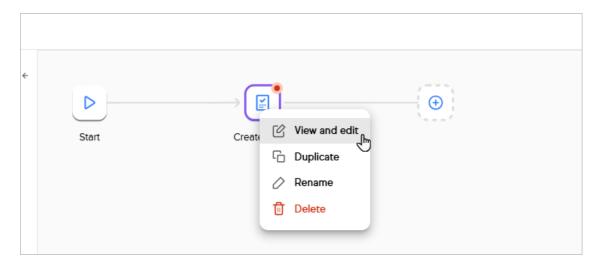




5. Click in to your sequence and set up the task



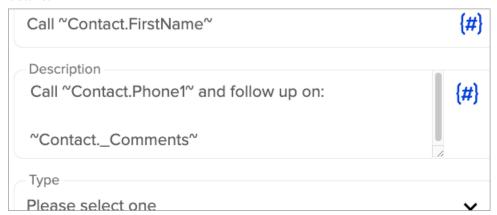
6. Click your task to set it up



- 7. 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.

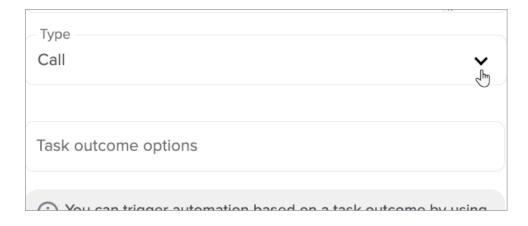


• The **Description** provides additional details when the user clicks on the title to view the task details.

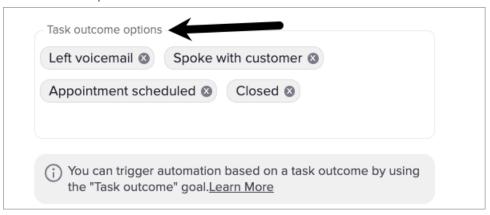


This could contain instructions, a script, or a list of "to do" items related to this task.

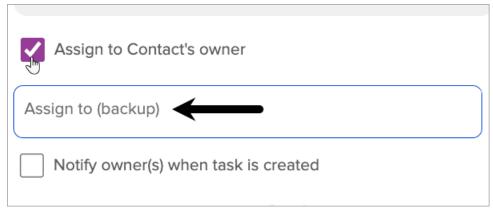
• The **Type** for the task, such as call, email, appointment, fax, or letter.



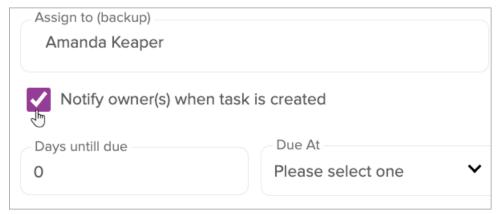
- 8. Next Identify **task outcome options** for this task, assign the task, and set a due date and time
  - Task outcome options



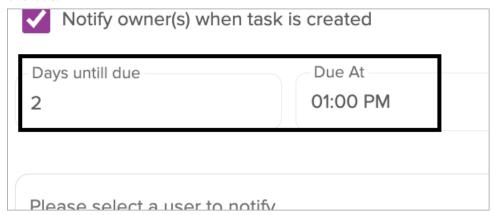
- Assign the task:
  - **Assign to Contact's owner**: Check the box if you want the user who is the assigned owner of the contact record to complete this task (e.g. sales rep.)
  - Assign to (backup): Select a backup user from the drop-down. This setting assigns a specific user to complete this task 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.



- Notify the Owner when the task is created:
  - Check the box to have a notification sent to the Owner an email notifications

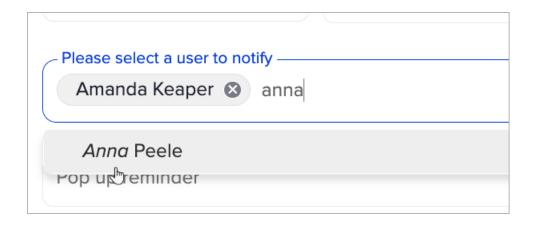


- Set a **due date**, **time**, and **priority**. The due date is different from the assign date.
  - The task is created and assigned *based on the sequence timer* before it in the sequence.
  - The **due date** is used to determine whether the task has been completed on time or is overdue.

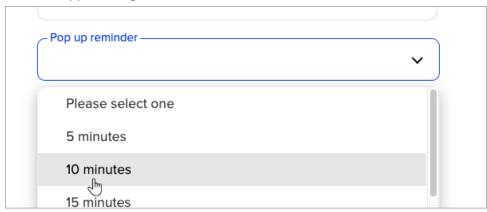


## 9. Select additional users to notify (Optional)

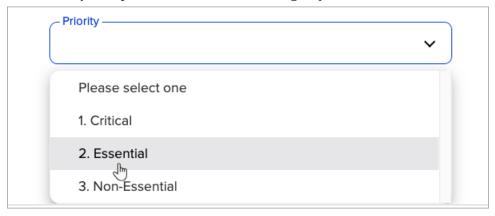
- Set up email notifications by
  - Typing the users name in the field
  - Or by blocking on a name to select a user.
- Repeat the process to add more user notifications. Every time the sequence creates a task, these users will receive an email.



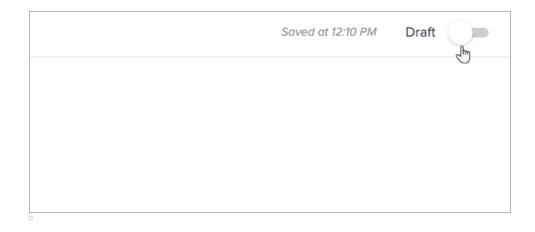
10. **Pop up reminder** (Optional): A browser pop-up will be triggered to remind the owner and users of the tasks approaching due date.



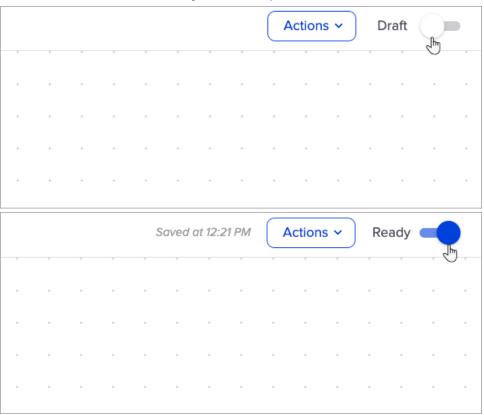
11. Set the task **priority**, which is used to set the urgency level of the task.



12. Click the "Draft" slider to "Ready" for the task



13. Click the "Draft" slider to "Ready" for the sequence



14. You are now ready to publish your changes.



