Automatically create a task in a sequence

This article applies to:

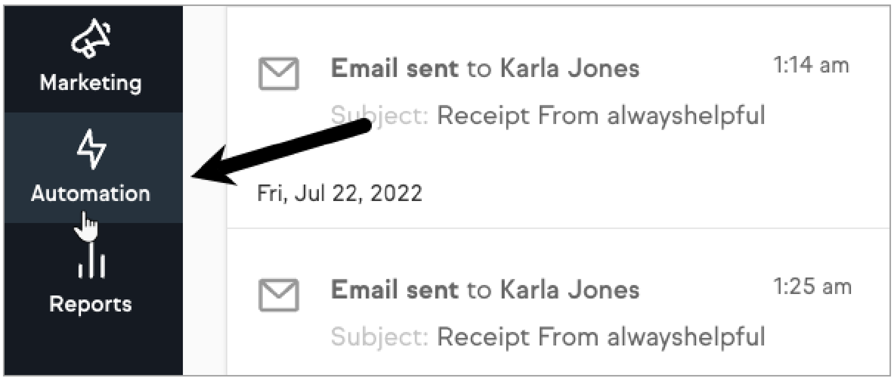
Pro
Max

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.

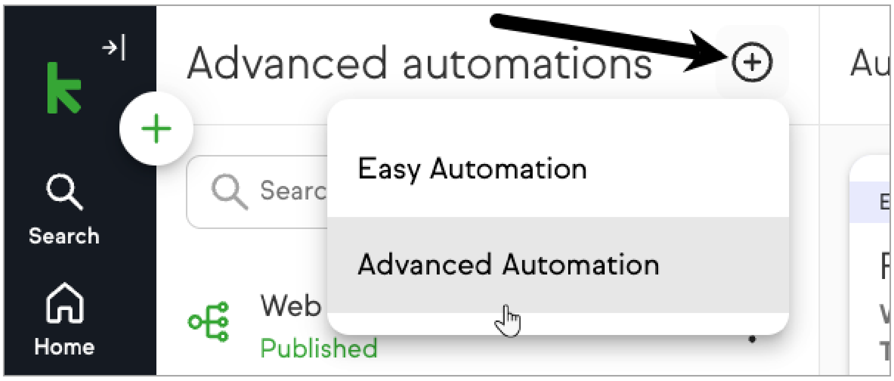
Remember! Each task object must be configured individually. They cannot be re-used in multiple sequences or at more than one point in the same sequence. Task objects are not archived. If you delete a task object from a sequence, it can only be restored if you restore a previous version of the entire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

Create a task with Advanced Automation

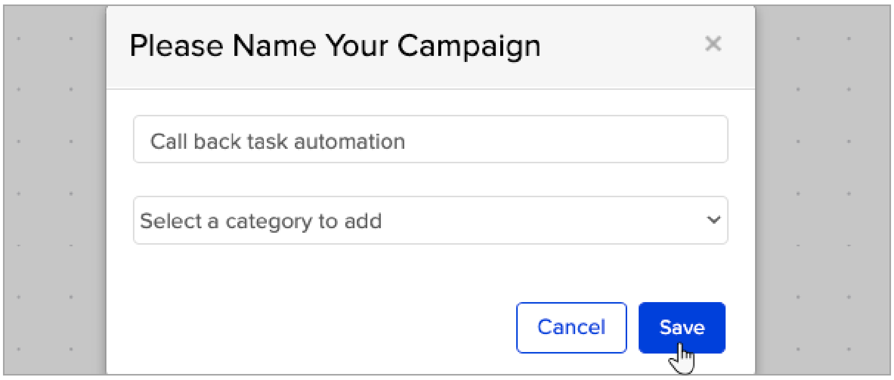
1. Click on **Automations** in the left-hand menu.



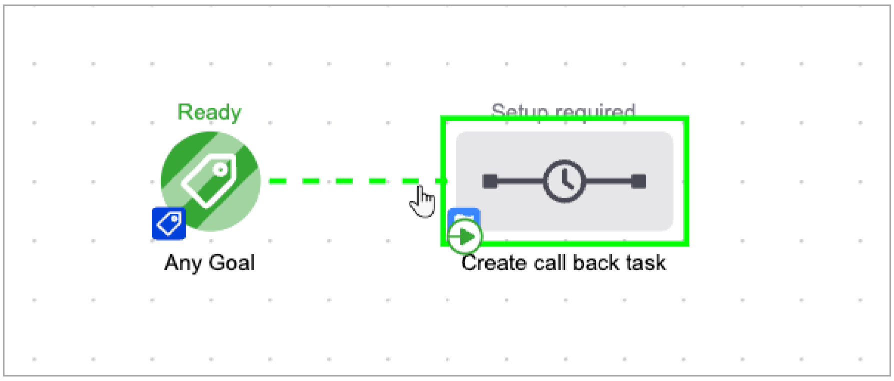
2. Click the + button to create a new automation and choose**Advanced Automation**.



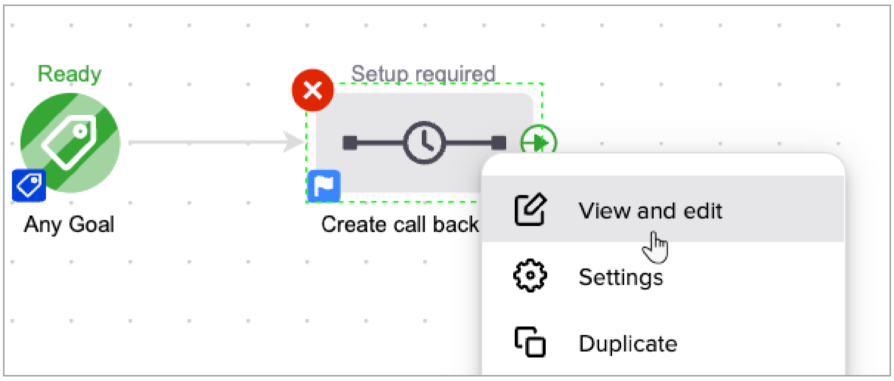
3. Give your automation a unique Name for your automation and a category (optional) followed by "**Save**"



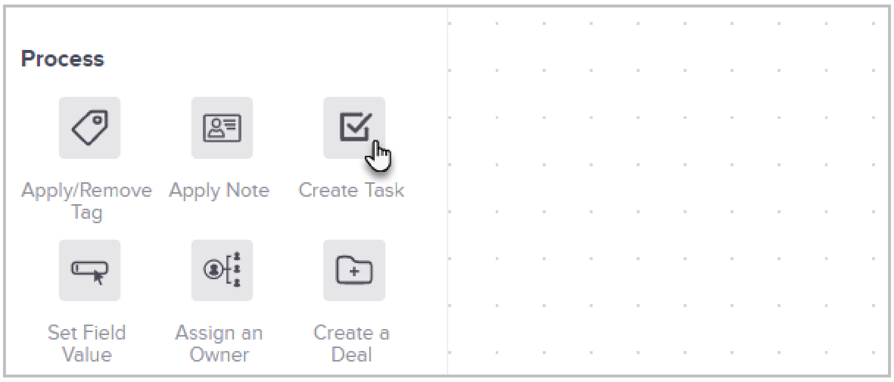
4. Connect any "**Goal**" that will be used to start the automation to create the task and connect to a "**Sequence**"



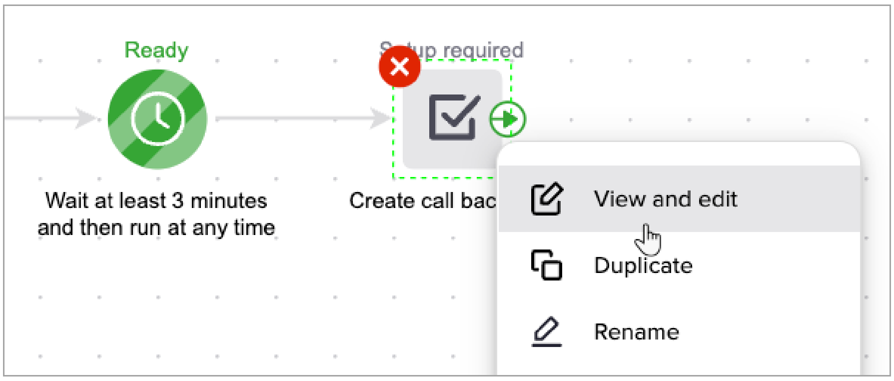
5. Click the "**Sequence**" followed by "**View and edit**"



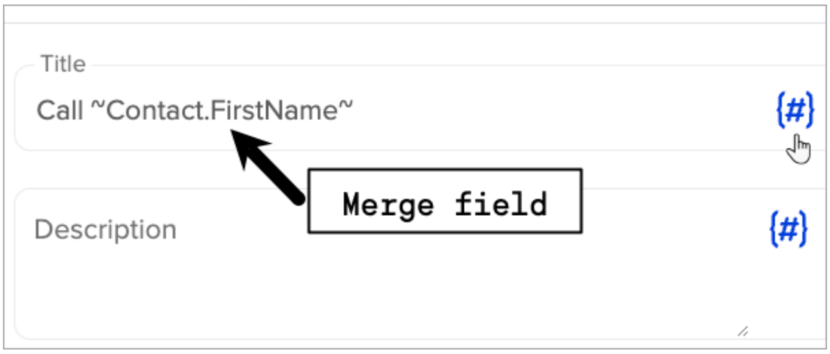
6. Drag and drop a **Create Task** object onto the canvas.



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



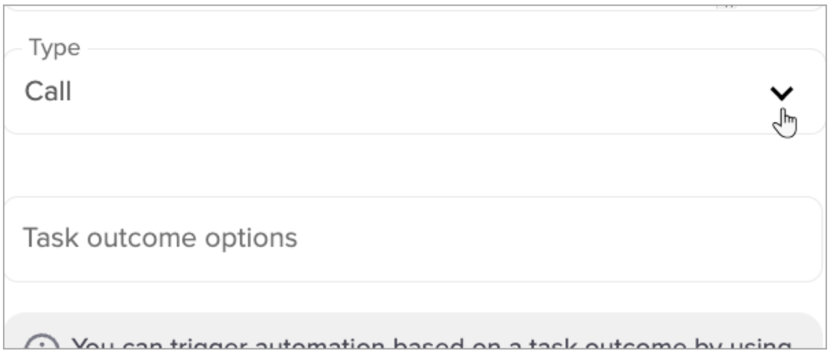
8. Enter the **task title** and **description**.
    - The **Title** is displayed on the user's task list. Use "#" to access **Merge fields**" to personalize your task.



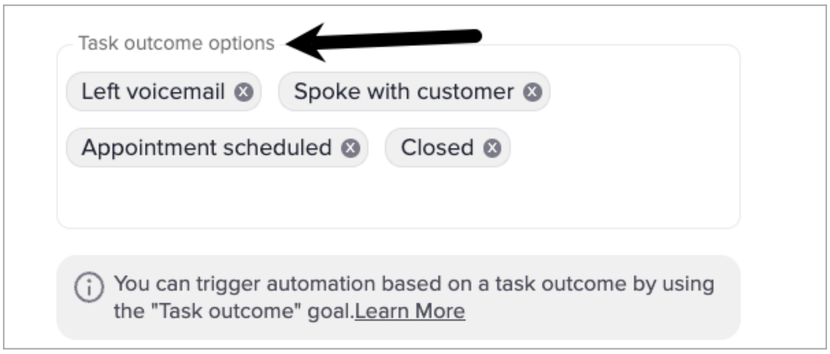
    - The **Description** provides additional details when the user clicks on the title to view the task details.

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

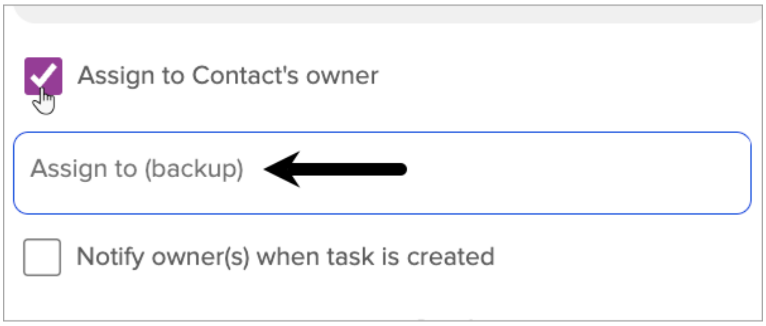
    - The **Type** for the task, such as call, email, appointment, fax, or letter.



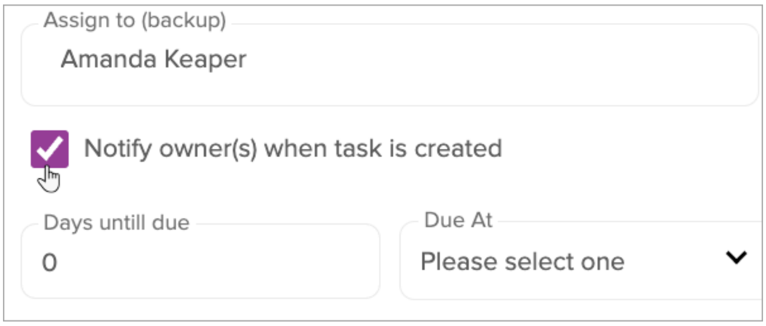
9. Next Identify **task outcome options** for this task, assign the task, and set a due date and time
   - Task outcome options

   - 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.

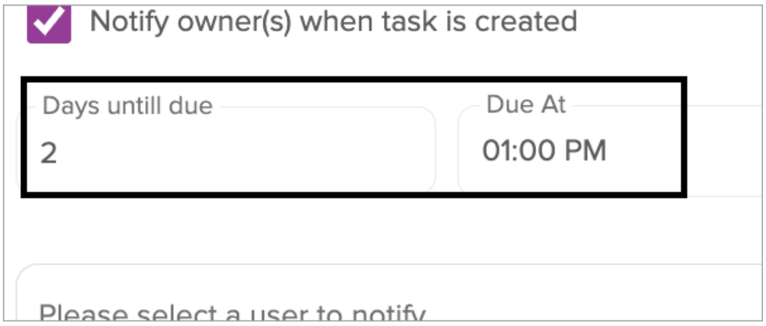
       

   - Notify the Owner when the task is created:
     - Check the box to have a notification sent to the Owner an email notifications

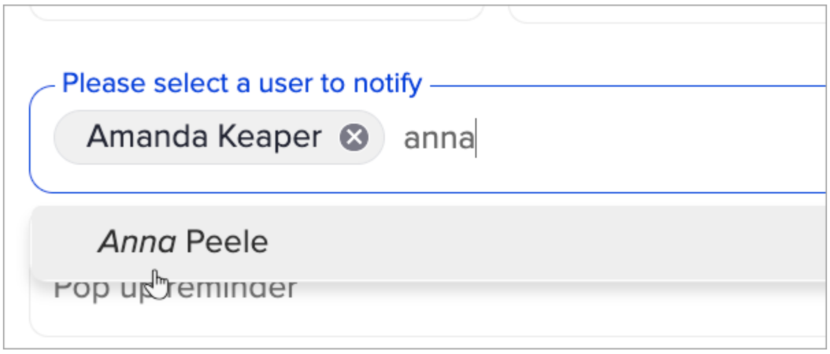
       

   - Set a **due date**, **time**, and **priority**. The due date is different from the assign date.

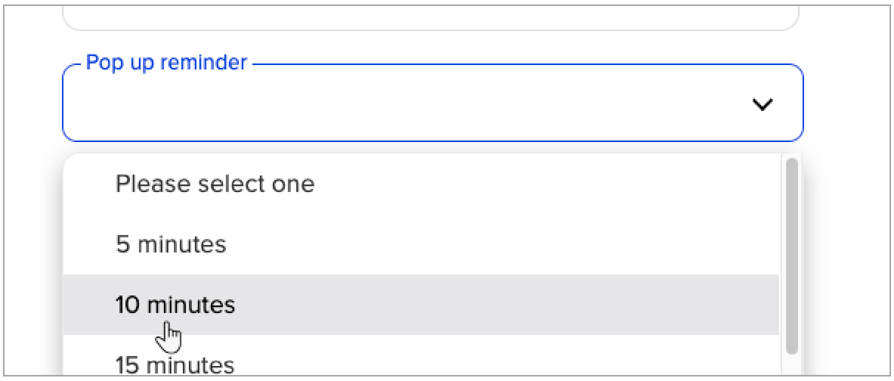
    - The task is created and assigned *based on the sequence timer* before it in the sequence.
    - The **due date** is used to determine whether the task has been completed on time or is overdue.



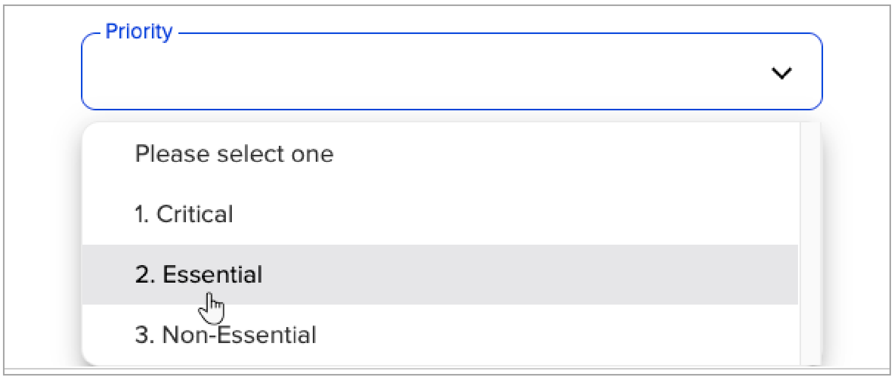
10. **Select additional users to notify (Optional)**
    - Set up email notifications by
        - Typing the users name in the field
        - Or by blocking on a name to select a user.
    - Repeat the process to add more user notifications. Every time the sequence creates a task, these users will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



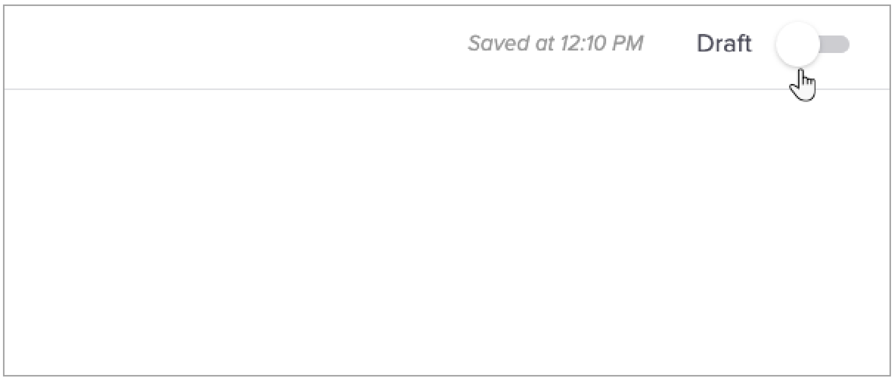
11. **Pop up reminder** (Optional): A browser pop-up will be triggered to remind the owner and users of the tasks approaching due date.

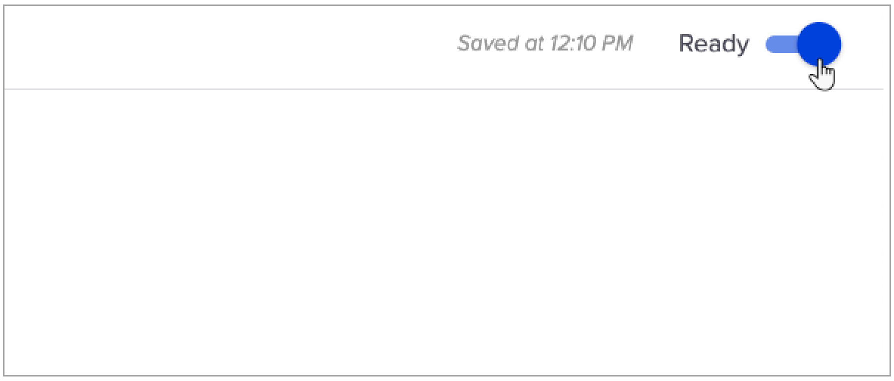


12. Set the task **priority**, which is used to set the urgency level of the task.



13. Click the **"Draft"** slider to **"Ready"** for the task





14. Click the **"Draft"** slider to **"Ready"** for the sequence

15. You are now ready to publish your changes.