Automatically create a task in a sequence

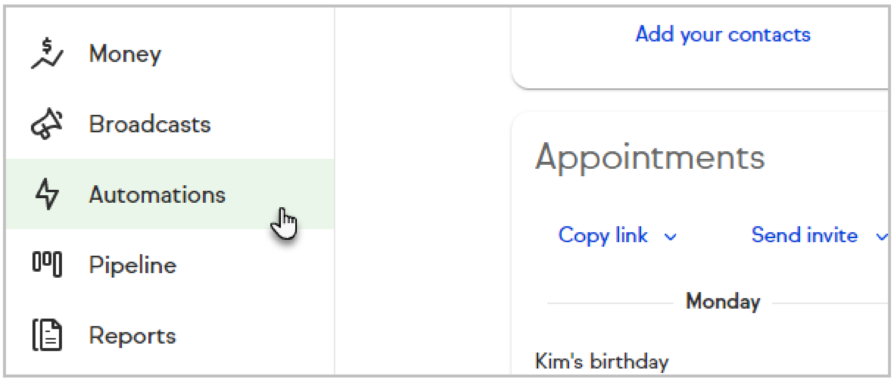
This article applies to:

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.

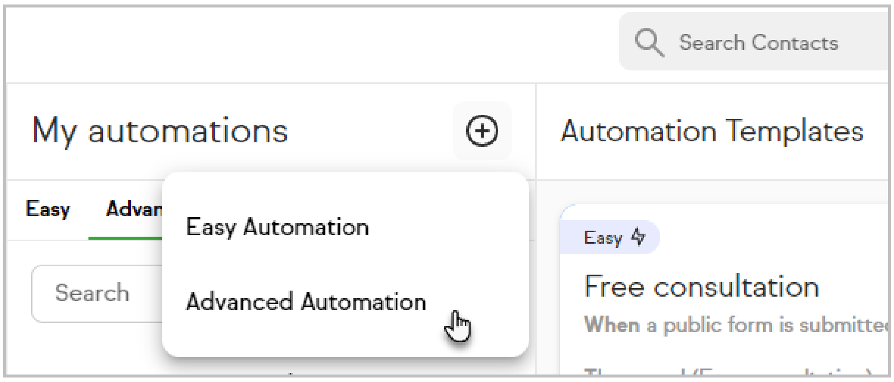
Remember! Each task object must be configured individually. They cannot be re-used in multiple sequences or at more than one point in the same sequence. Task objects are not archived. If you delete a task object from a sequence, it can only be restored if you restore a previous version of the entire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

Create a task with Advanced Automation

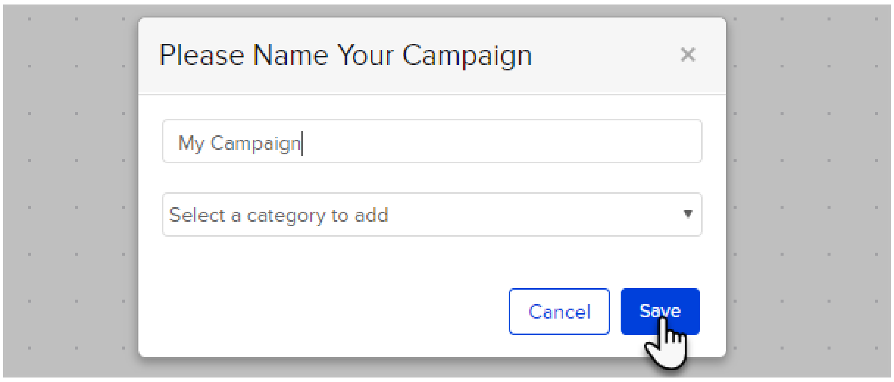
1. Click on **Automations** in the left-hand menu.



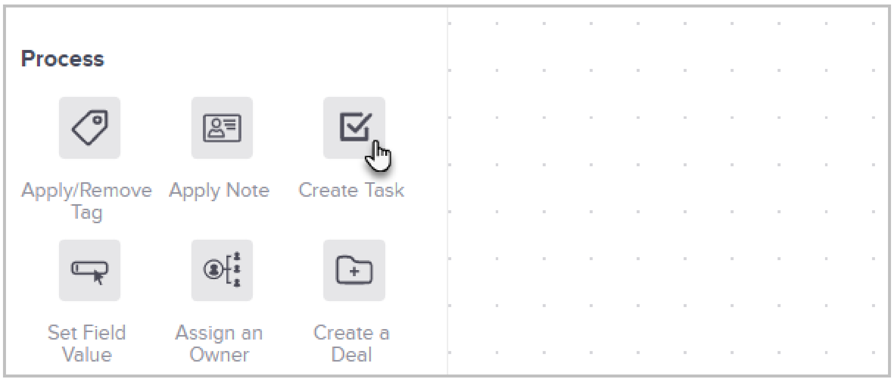
2. Click the + button to create a new automation and choose **Advanced Automation**.



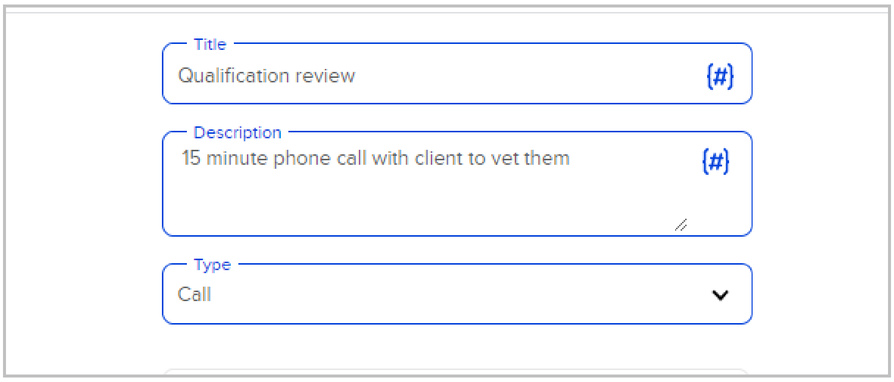
3. Name your automation and click **Save**



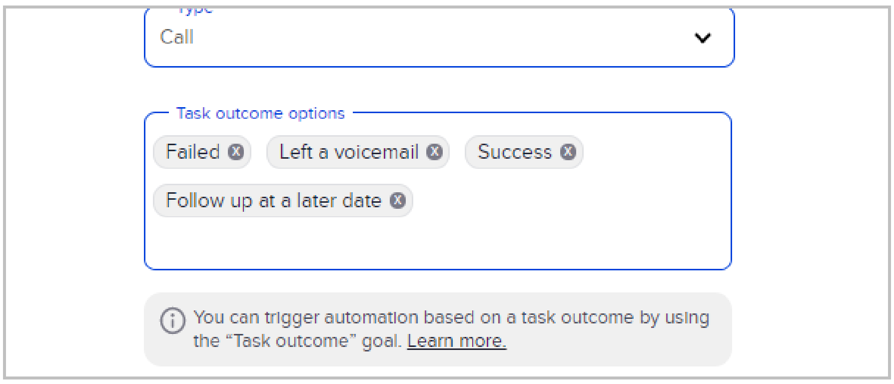
4. Drag and drop a **Create Task** object onto the canvas.



5. Double-click it and select a task type from the drop-down.
6. Enter the **task title** and **description**. The title is displayed on the user's task list. 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.
7. Select a **type** for the task, such as call, email, appointment, etc.

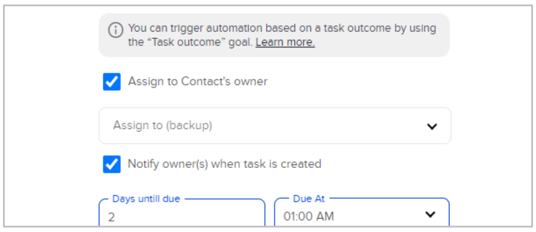


8. Identify **task outcome options** for this task



9. **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.

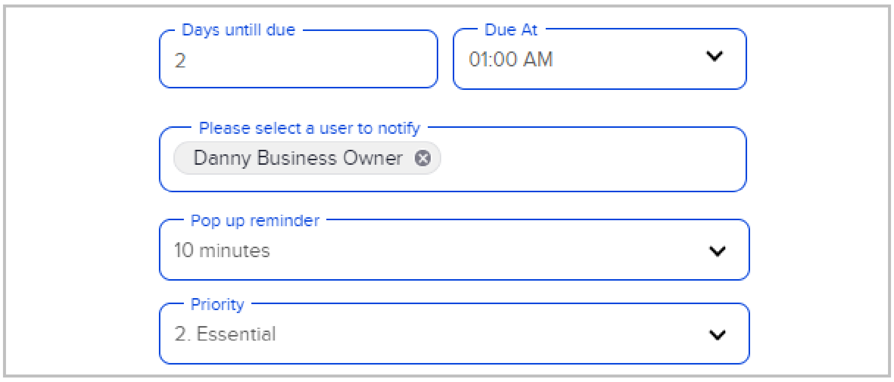
      

10. Set a **due date**, **time**, and **priority**. The due date is different from the assign date. The task is created and assigned based on the sequence timer before it in the sequence. The due date is used to determine whether the task has been completed on time or is overdue.

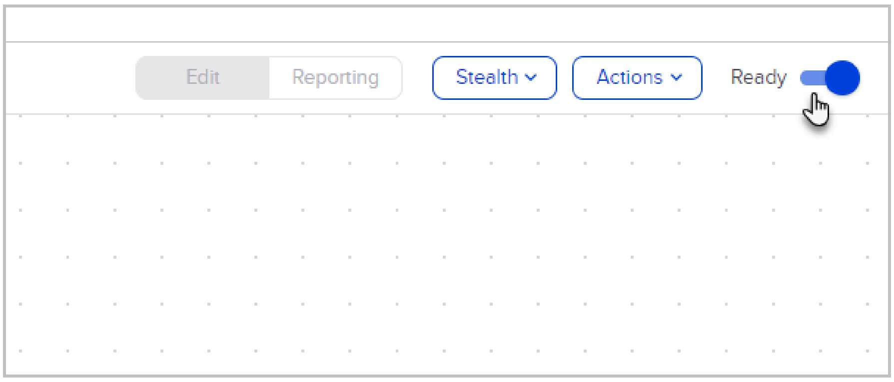
11. **Notify** (Optional)**:** Set up email notifications, check the box to have a notification sent to the Owner and/or type a user name into the search box and click on a name to select a user. Repeat the process to add more user notifications. Every time the sequence creates a task, these users will receive an email.

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

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

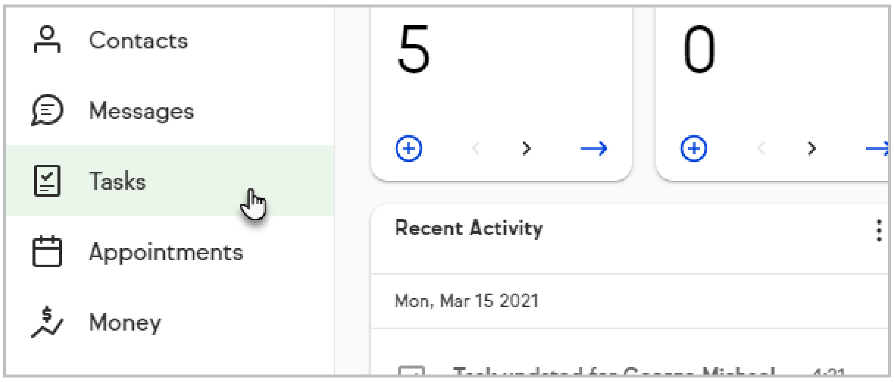
14. Click **The Draft** to **Ready** slider to set the task to **Ready**.

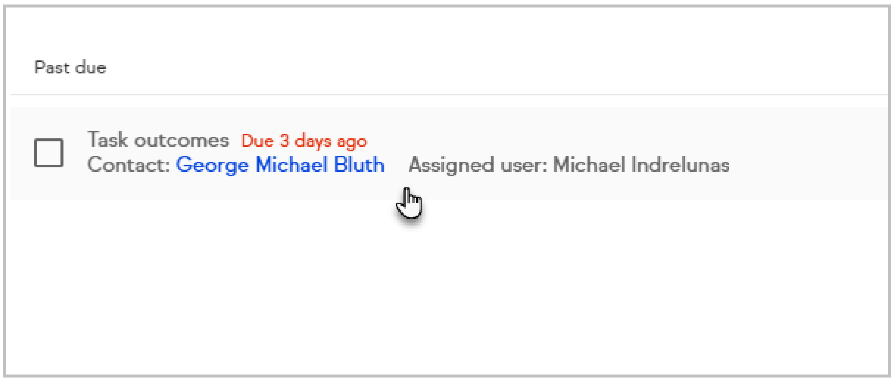
15. You are now ready to publish your changes.

Set a Task outcome

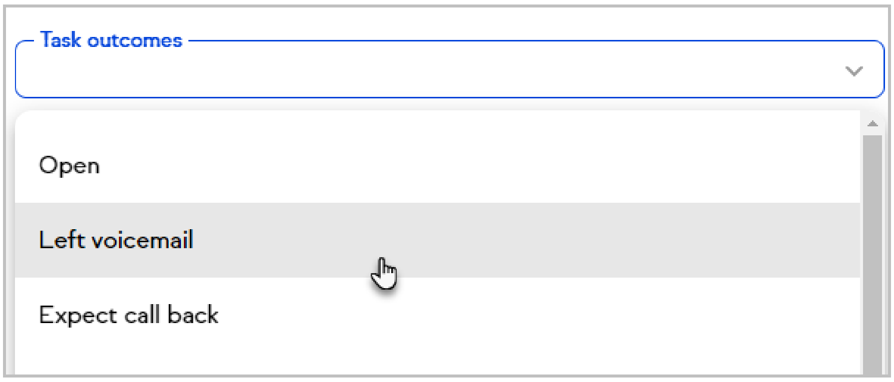
1. Navigate to **Tasks**



2. Click a task that was created by automation



3. Select an outcome



4. Close the task or mark it as complete