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.
     
     ![Merge field example](image)

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

     ![Task details example](image)

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

     ![Type selection example](image)
9. Next identify **task outcome options** for this task, assign the task, and set a due date and time

   - **Task outcome options**
     
     ![Task outcome options](image)

     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.

     ![Assign to Contact's owner](image)

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

     ![Notify owner(s) when task is created](image)

   - **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
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.