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Each User has a Task Profile among the User's Business Profiles. The Task Profile determines whether you or I function at User, Supervisor or Executive level.

That impacts on who can Assign a task to him or herself, but one needs to be a Supervisor or an Executive to be able to assign to some other Users and also to see the tasks of other Users and to work with them.

But we can Submit a New Task, Flagged for Insurance, not necessarily for any specific Customer Account, but we can indicate that in the Instructions or the Description.

So we can Submit a New Task directly form the Insurance Brokerage Main Screen, by choosing "Submit New Task"

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Each Task must have a Description and must have a priority selected.

Beyond that, the other detail are all optional because once we have a Description and a Priority, we can actually "Save" or "Submit" the Task.

However we can detail further instructions. We can also Assign a different User to complete it.

We can change the estimated time that is required for the Task to be completed and also the "Complete By Date" can be changed.

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When we have specified what we want to specify, we can simply choose "Update" to Submit the New Task.

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