WEALTH STAKR

HOW-TO GUIDE

Tasks and the task flow

Raise a task, hand it to the right person, work it together through comments and status changes, and close it off, knowing who sees what along the way.

For: Advisers, admin staff and practice MDs **Time:** About 10 minutes

Before you start

- You need the Tasks permission for the task list and Task Inbox for the inbox. Templates need Task Templates, renewals need STI Renewals and the Task duration report needs Time Reports.
- Generators and recurring task sets are part of the Accounting add-on. Practices without it don't see them.
- Know who in the practice should do the work and which client or entity it is for.

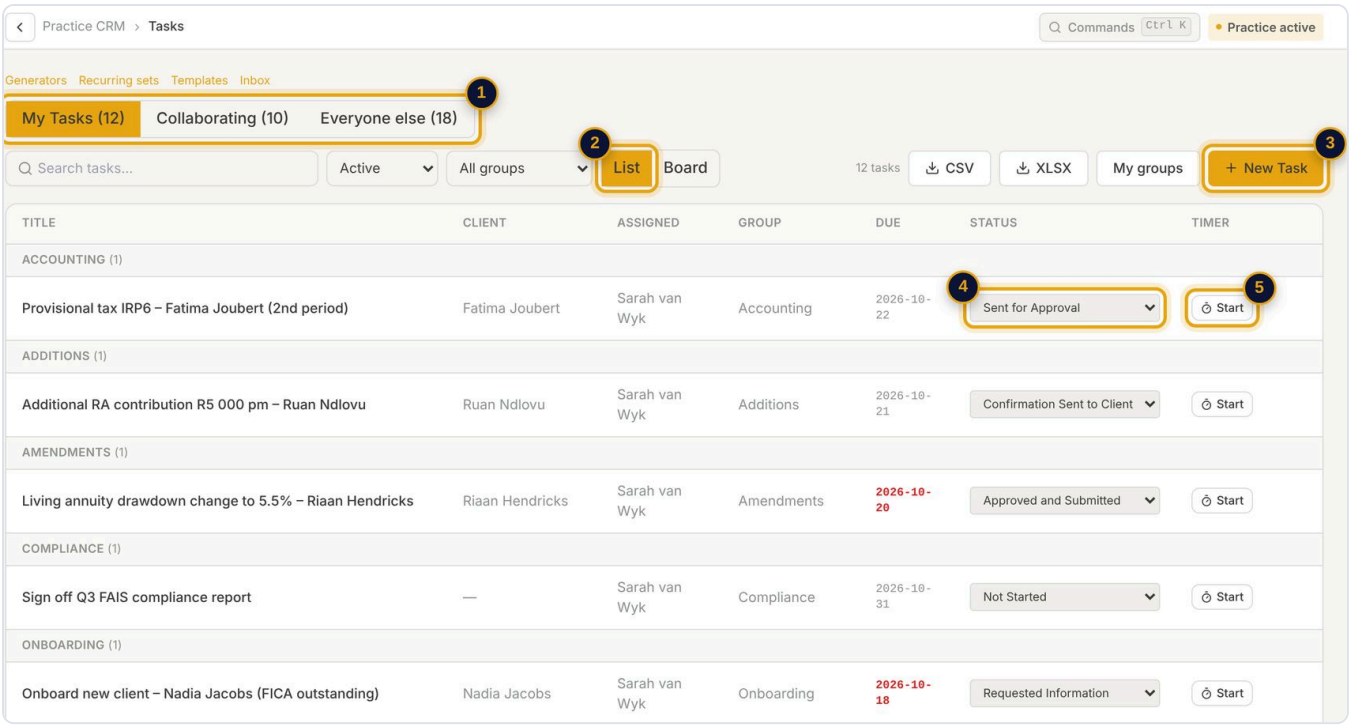
1. How the task flow works

Every task moves through the same five moves: raise it, assign it, collaborate on it, update its status, and complete it. The people on a task are its creator, its assignee and any collaborators. Only they see it, plus the Practice MD, who sees every task.

1. **Raise**: anyone with Tasks access creates a task from **Tasks › Tasks › New Task**, from a client's or entity's **Tasks** tab, or by applying a template.
2. **Assign**: pick one person in **Assigned to**. The creator and the assignee are always on the task and can't be removed. Add anyone else who needs to follow it as a **Collaborator**.
3. **Collaborate**: people on the task add comments (with screenshots), attachments and reactions. Each change goes to the other people's **Task inbox**, never to the person who made it.
4. **Update status**: move the task through **Not Started**, **Requested Information**, **Info Received - Processing**, **Sent for Approval**, **Approved and Submitted** and **Confirmation Sent to Client**. Anyone on the task can change it.
5. **Complete**: set **Task Completed**. The task leaves the **Active** list and shows under **Completed**, and its time from raised to completed feeds the **Task duration** report.

TIP The assignee is not notified when a task is created with them already assigned. Tell them, or share the task to them in Chats (section 6). If you assign or add someone to an existing task, they get an "added you as a collaborator" update.

2. Find your tasks



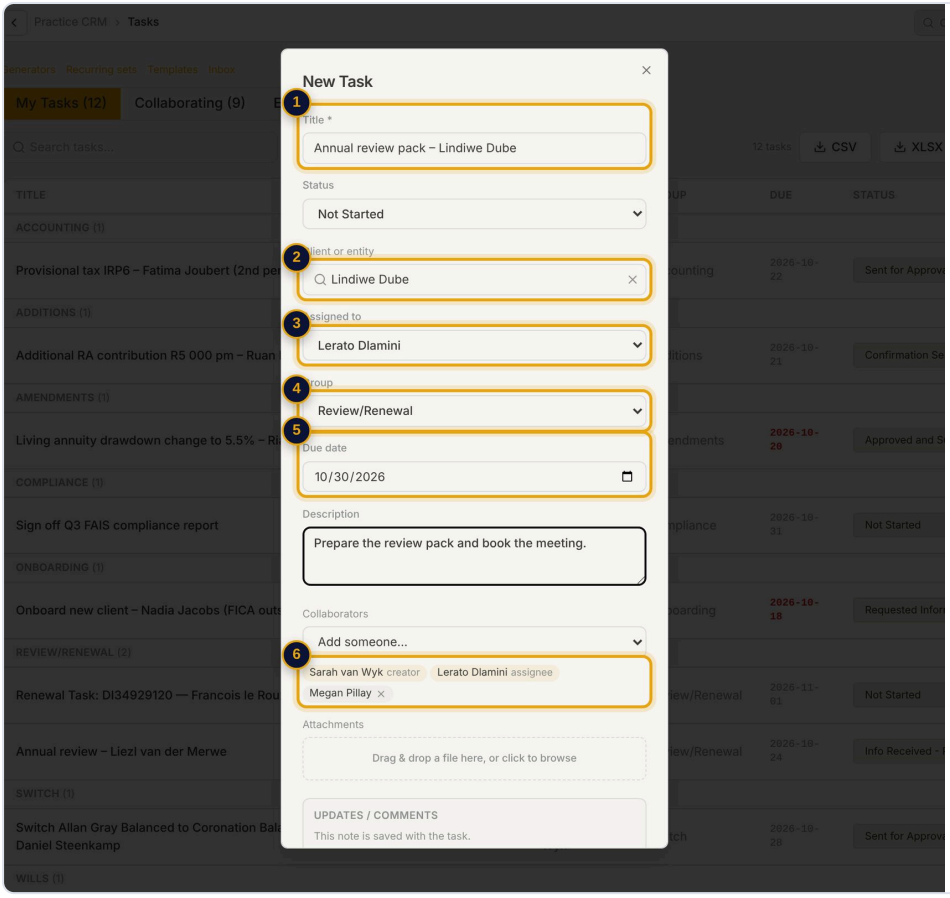
Tasks › Tasks, list view

1. Go to **Tasks › Tasks**. Choose **My Tasks** (assigned to you), **Collaborating** (you created it for someone else, or you were added as a collaborator) or **Everyone else** (only shown to a Practice MD, for tasks they are not on). The counts are in brackets.
2. Switch between **List** and **Board**. The list is split into headings by group, with ungrouped tasks last. Use **Active**, **Completed** or **All**, the group filter and **Search tasks...** to narrow it. **CSV** and **XLSX** download what is shown.
3. Click **New Task** to raise a task (section 3).
4. Change a task's status straight from the row without opening it. If the save is refused the old status comes back with a message.
5. Click **Start** to time your work on a task; it turns into **Stop** with the running time. Only one timer runs at a time: starting another stops the first. Time is logged against the task.

TIP A due date in red means the task is overdue (past due and not completed).

TIP Click a client's name in a row to open their file; click anywhere else on the row to open the task.

3. Raise and assign a task



The New Task form

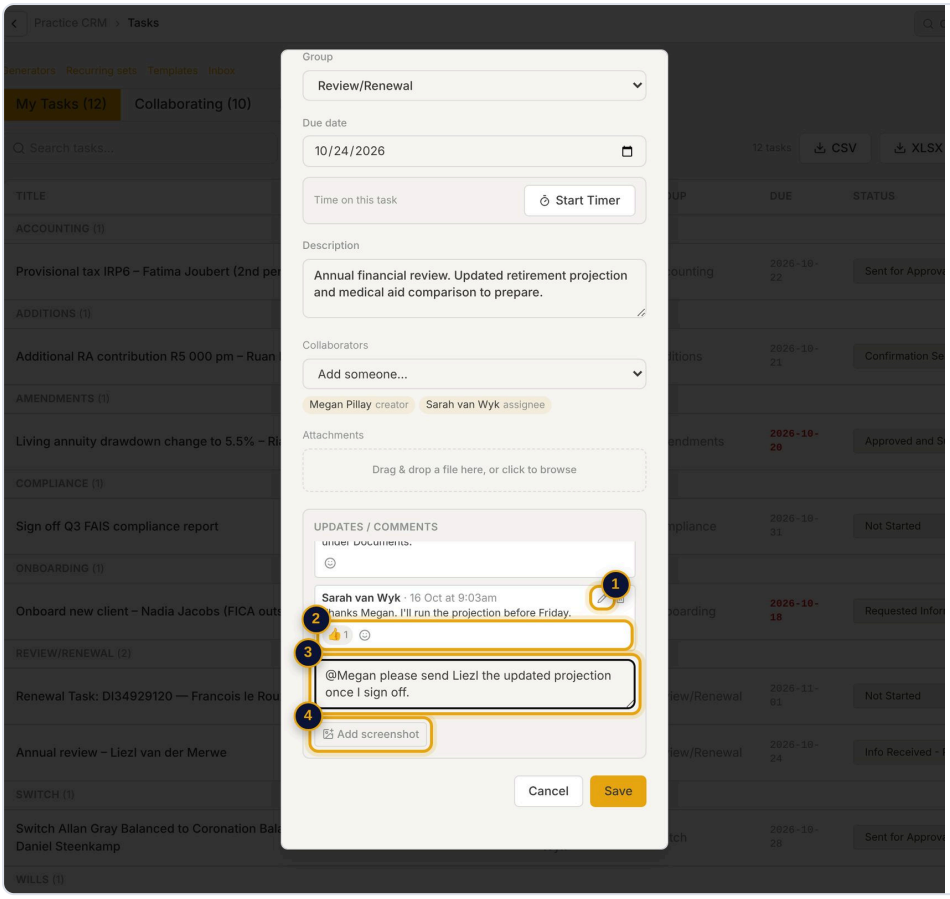
1. Click **New Task** and type a **Title** (required). **Status** starts on **Not Started**.
2. In **Client or entity**, type at least two letters and pick the client or entity from the list. This links the task to the record, so it appears on that client's **Tasks** tab. You can only link clients in your own book.
3. Choose who does it in **Assigned to**, or leave it **Unassigned**.
4. Pick a **Group**: **Practice groups** are the practice's standard set, **My groups** are your own. Create your own groups with **My groups** on the task list.
5. Set the **Due date** and add a **Description**.
6. Use **Collaborators › Add someone...** for anyone else who should follow the task. You (creator) and the assignee are added automatically and shown first. Click the **x** on an extra collaborator to remove them. You can also drag a file onto **Attachments** and write a first note under **Updates / comments**. Click **Save**.

TIP Cancel, Escape or clicking outside the form asks before throwing away a form you have typed in, and removes any files you attached in that sitting.

TIP From a client's or entity's Tasks tab you can add a quick task (title, Assigned to, Description, Add task) without leaving the client.

4. Work the task together

Click a task to open it for editing. Changes to the fields are saved when you click **Save**; reactions and edits to existing comments save straight away.



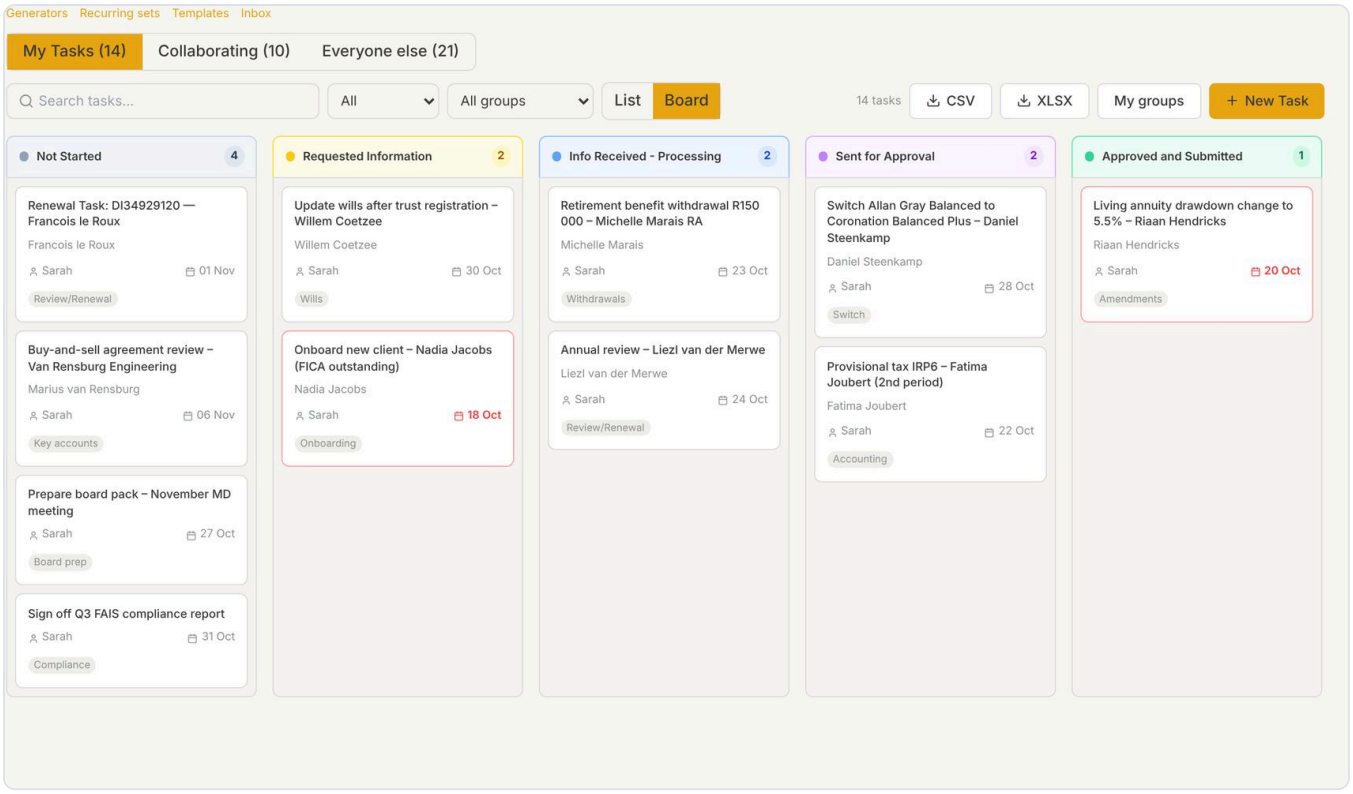
Edit Task › Updates / comments

1. Your own comments have a pencil to edit them and a bin to delete them. Nobody else can change your comment. An edited comment shows **· edited**, and deleting asks you to confirm because everyone on the task stops seeing it.
2. React to any comment: click the smiley and pick one of eight reactions, or click a reaction that's already there to add yours. You have one reaction per comment; clicking yours again takes it back. The comment's author gets an inbox update.
3. Type a new comment in the box. Type **@** and a colleague's full name, or their first name if no one else shares it, to ask them a question (see the tip below).
4. Add screenshots to the comment: paste (Ctrl+V) or drop an image into the box, or click **Add screenshot**. Up to six per comment, PNG, JPEG, GIF or WebP, up to 8 MB each. Then click **Save**.
5. Other controls on the open task: **Start Timer** / **Stop Timer**, the **Share** button at the top (**Copy link** or **Send in Chats…**), and **Attachments**, which are stored in Documents (linked to the task's client) and keep the same permissions as any document.

TIP Screenshots can only be added once the task has been saved. On a new task you'll see "Save the task first to add screenshots."

TIP To get an answer from someone who isn't on the task, add them as a **Collaborator**, or @mention them in a reply from the **Task inbox**.

5. Use the board

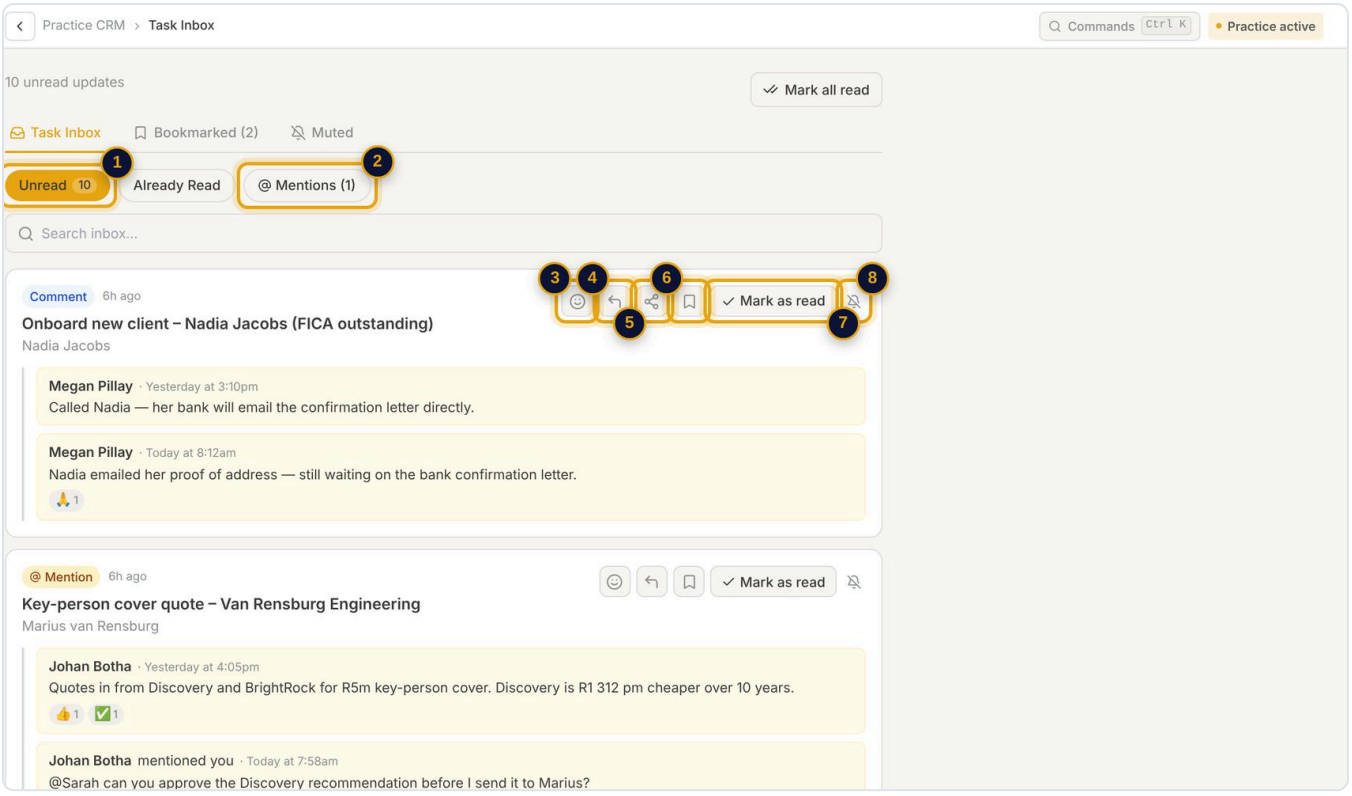


Board view, one column per status

1. Click **Board**. The list switches to all statuses and shows one column per status, with a count in each heading.
2. Drag a card to another column to change its status. Click a card to open the task.
3. Overdue cards are outlined in red, and each card shows the client, assignee, due date and group.

6. Keep up with the Task inbox

Tasks › Task inbox shows updates on the tasks you are on, one card per task with its latest three updates (**See more activity** shows the rest).



Tasks › Task inbox

1. **Unread** holds new updates; **Already Read** holds the rest. **Mark all read** clears the lot.
2. **Mentions** filters to questions addressed to you. A mention card is not a link: being mentioned doesn't give you access to the task, so answer it with Quick reply.
3. React to the latest update with one of the eight reactions.
4. **Quick reply** adds a comment to the task without opening it. Everyone on the task is told, and @mentions in a reply work.
5. **Share** copies the task link or sends it to a colleague in Chats with an optional note.
6. **Bookmark** marks the card read and keeps it under **Bookmarked** to follow up. Click it again to remove the bookmark.
7. **Mark as read** moves the card to Already Read.
8. The bell **mutes** the task: its updates stop coming in until you unmute it. **Undo** appears straight after, and **Muted** lists every muted task with **Unmute**.

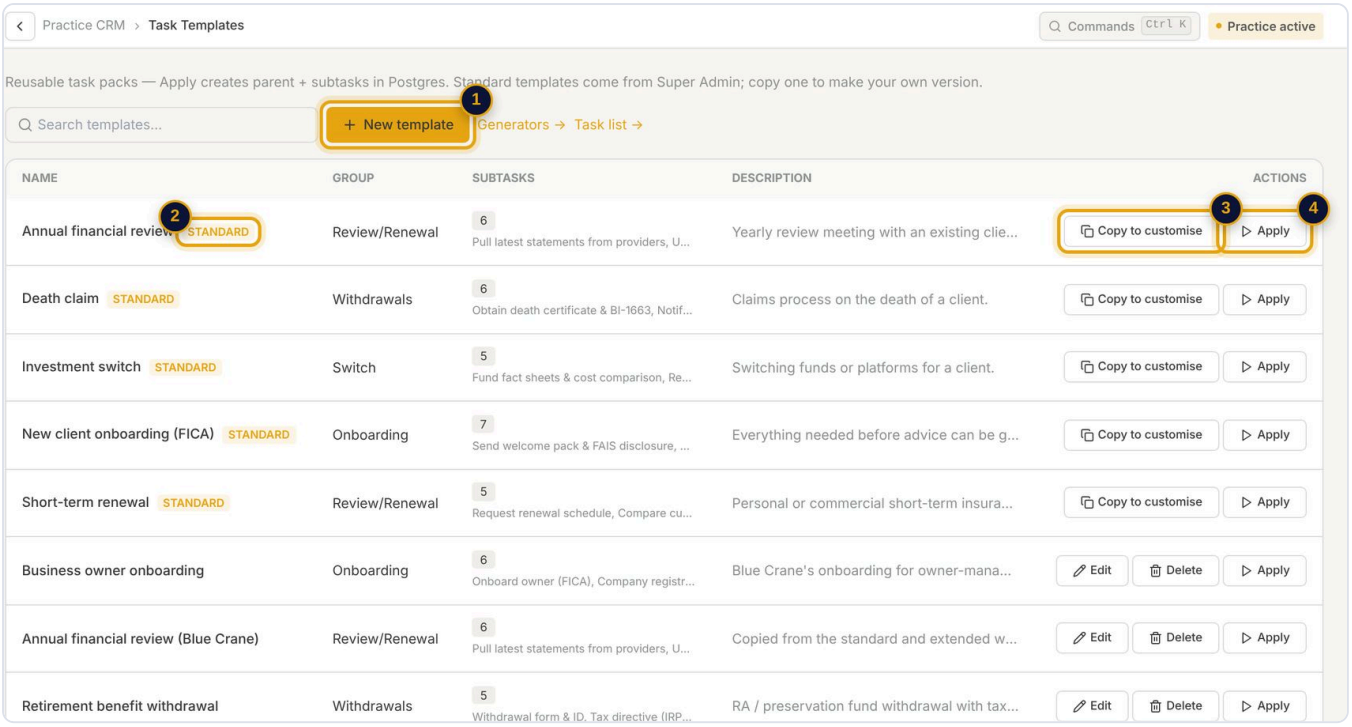
7. Know who gets notified

1. The other people on the task get an inbox update when someone comments, changes the status, changes or removes the due date, or adds a collaborator (the new person sees "added you as a collaborator").
2. The author of a comment is told when someone reacts to it.
3. Someone @mentioned in an inbox Quick reply gets a **Mention** update even if they are not on the task. It answers the question only; it doesn't add them to the task.

4 You never get an update for your own action. Creating a task, editing its title or description, and adding attachments send no update, and there are no overdue alerts in the inbox.

8. Reuse task templates

Open **Templates** from the links at the top of **Tasks › Tasks**. Templates are task packs: a main task plus subtasks.



Task Templates

1 Click **New template** to make a practice template: **Name** (required), **Group**, **Description** and **Subtasks (one per line)**.

2 Templates marked **Standard** are supplied centrally. Every practice can apply them, but nobody in the practice can edit or delete them.

3 Click **Copy to customise** to make an editable practice copy of a standard template. Your practice's own templates have **Edit** and **Delete**.

4 Click **Apply**, optionally choose a **Client**, and click **Create tasks**. You get the main task plus one task per subtask (named "Template: subtask"), all **Not Started**, in the template's group and linked to the client.

TIP After applying a template, open each new task and set **Assigned to** so it lands in the right person's **My Tasks**.

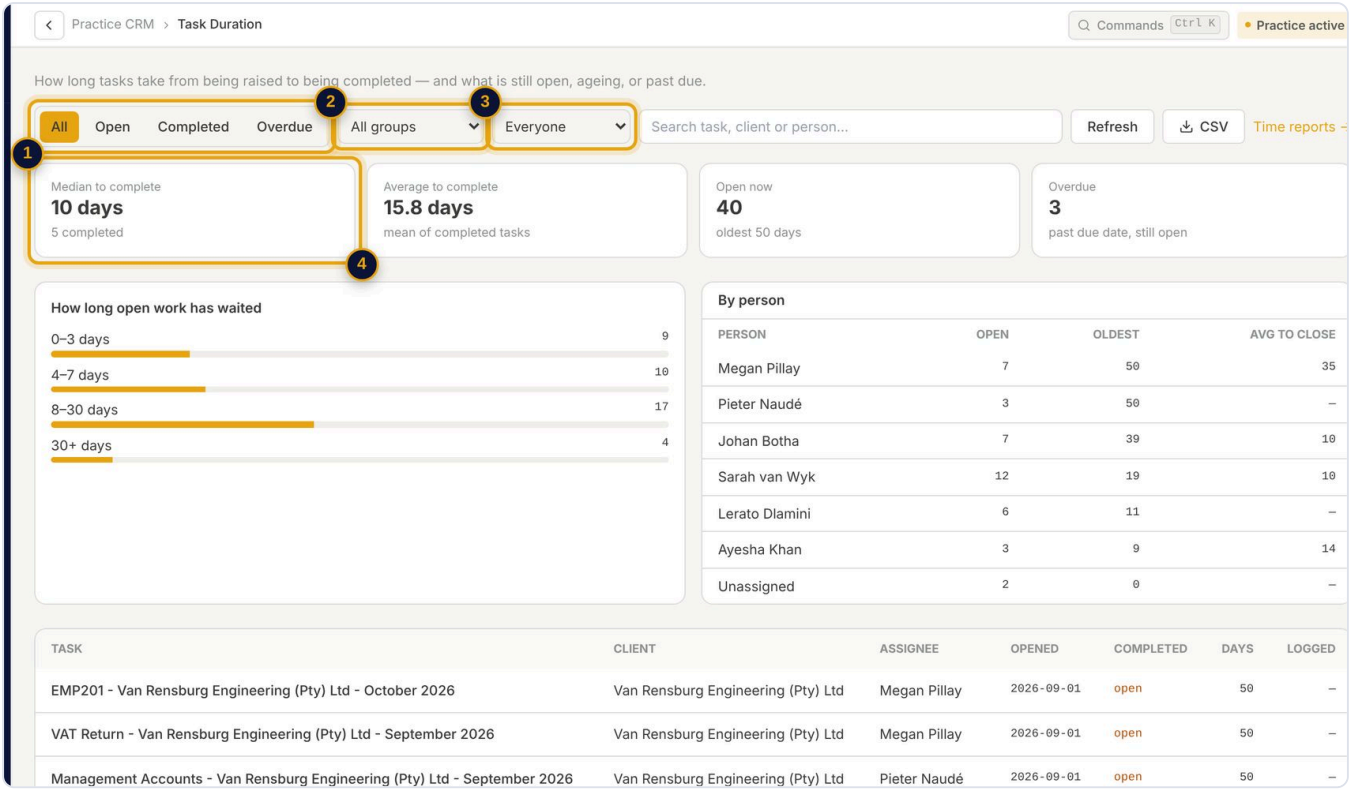
9. Renewal tasks, recurring tasks and generators

1 **Renewals**: the automatic "Policy renewal: ..." reminders don't appear on the task list. They are on **Tasks › Renewals**, one row per policy, where you can change the reminder's status. On a renewal's page, choosing a user in **Responsible** puts a **Renewal Task** in that person's task list; its row has an **Open renewal** link back to the renewal.

2. **Generators** (Accounting add-on): **Accounting › Recurring costs** opens **Task Generators**. Each card (**VAT returns**, **Payroll EMP201**, **Management accounts**, **Provisional tax**, **Income tax**, **Recurring sets**) creates dated tasks from the client and entity service flags. Set the **Target month** or **Months ahead**, click **Generate**, then **Confirm generate**. Tasks that already exist are skipped and counted.
3. **Recurring sets** (Accounting add-on): **Accounting › Recurring tasks**. Click **Add set** (**Category**, **Cycle label**, **Assigned to**, **Notes**), then **Generate tasks** to create the next three months of tasks from all active sets. **Pause** / **Activate** a set, or delete it with the bin.

TIP Generated tasks land in the **Recurring** group. The Practice MD should open them after each run and set **Assigned to**.

10. See how long tasks take



Time & Leave › Task duration

1. Go to **Time & Leave › Task duration**. Filter by **All**, **Open**, **Completed** or **Overdue**.
2. Narrow to one group.
3. Narrow to one person, or search by task, client or person.
4. Read the cards: **Median to complete**, **Average to complete**, **Open now** and **Overdue**. Below them, **How long open work has waited**, **By person**, and a row per task with days open and time logged by timers. **CSV** downloads the rows.

TIP The report covers the same tasks you can see on the task list, and leaves out automatic renewal reminders.

Questions

Why can't I see a colleague's task?
You only see tasks you created, are assigned to, or collaborate on. Ask them to add you as a collaborator. The Practice MD sees every task under Everyone else.

I assigned a task but my colleague says they weren't told.

Creating a task doesn't send an inbox update. Share it to them in Chats, or assign them on an existing task, which sends "added you as a collaborator".

Can I edit someone else's comment?

No. Only the author of a comment can edit or delete it.

Where are my generated VAT and EMP201 tasks?

They have no assignee, so only the Practice MD sees them, under Everyone else in the Recurring group, until they are assigned.

Ask Stakr

Stuck? Open **Ask Stakr** in the sidebar and ask in your own words, for example:

- How do I assign a task to a colleague?
- Who can see my tasks?
- How do I mute a task in my inbox?
- How do I apply a task template to a client?
- Where do renewal tasks show up?