



Using task templates

In this video you will learn how to set up and use Task templates.

Setting up Task templates makes it quick and easy to create tasks in future, as the basic information and requirements will already be populated for you.



To set up task templates for your farm, go to **Office**, **Admin**, **Task Templates**.

Task templates				Task templates	Task categor	
				•	Add task templa	ate
Task name	Contents	Туре	Category	Created by	Status	
Lambing Beat	Checklist	Animal	Lambing	Nicky North	Draft	Ø
Water Pump Maintenance	Notes, Instructions, Checklist	H & S, Land	R&M - Plant & machinery	Nicky North	Published	Ø

Click Add Task Template.





Create template	×
Task *	Add item to task
	Add category
	✔ Checklist
	General From computer
	From file library
	E Note
	Instructions
	Save template Cancel

A template can include a task title as well as categories, checklists, notes, and instructions.



Create template				×
Task *			Add item to task	
Clean sheep yards			Add category	
			Checklist	
Animal type Stock class	Mob		From computer	
Select Select options	Select ontions	A	🖆 From file library	
Paddock Block Paddocks			E Note	
Select options	\$		Instructions	
Checklist Standard Pass/Fail				
Water blast yards	Add note	* 🖉 🔳		
grease hinges	Add note	* 🖉 🔳		
Add another item				
Note		面		
Please make sure to record any damage that	requires repairs			
		S	ave template Cancel	

Setting up a template for cleaning the sheep yards means that each time to set a task for your staff using the template it will automatically include the checklist and note.

Click Save Template.

Task templates				Task templates	Task categories	
				0 /	Add task template	
Task name	Contents	Туре	Category	Created by	Status	
Clean sheep yards	Notes, Checklist	Animal, Land	Infrastructure	Nicky North	Draft	
Lambing Beat	Checklist	Animal	Lambing	Nicky North	Draft	Delete
Water Pump Maintenance	Notes, Instructions, Checklist	H & S, Land	R&M - Plant & machinery	Nicky North	Published	Publish

Once you have saved the template, you need to publish it so that it shows in your list of useable templates.

Click **Publish**.



Task templates				Task templates	Task categories	
				G A	dd task template	
Task name	Contents	Туре	Category	Created by	Status	
Clean sheep yards	Notes, Checklist	Animal, Land	Infrastructure	Nicky North	Published	5
Lambing Beat	Checklist	Animal	Lambing	Nicky North	Draft 🚺	Delete
Water Pump Maintenance	Notes, Instructions, Checklist	H & S, Land	R&M - Plant & machinery	Nicky North	Published	Return to draft

You can edit these templates at any time if your process changes, or if you don't wish to have a task showing in the off season you can edit it and mark it as draft again.

You now know how to create a task template in Farm^{IQ}.