Welcome to FunctionFox! Questions or comments? Contact us at 1.866.369.8463 or email staycreative@functionfox.com We are here to help!

Actions

Actions (FunctionFox Premier & In-House only) are a way to break down general tasks (Design, Concept Development, Copywriting, etc.) into specific items that need to be completed during a project. You can then take this Action and assign it to a member of your team. This adds an extra layer of accountability to the project, and ensures that the important things are getting done.

To assign Actions to your team, go to Traffic > Action Assignment in the left menu. To assign an Action, first select a Client and Project from the drop-down menus. Next, select the appropriate task from the Task drop-down, and fill in the Action field with what the action is (Action Name) and choose who you would like to assign it to from the Assign To: drop-down.

You can assign an action to multiple people by clicking the [+1] next to the Assign to: drop-down, and using either Ctrl+click, or CMD if you’re on a Mac. To multi-select. Next, set the date that the Action is due, and select either Normal, Low, or High priority (optional). You can create custom priorities using the Manage link next to the Priority drop-down. Using the Action Estimate, You have the option of specifying the maximum amount of time that you want the assignee to spend on this Action—useful if you’re on a tight timeline and/or budget. Enter in any extra Instructions or notes in the Action Note field, and then click Save.

Once saved, that Action will be added to the assignee’s To-Do List, and to the table at the bottom of the page, with a default status of To-Do. This table has two views—all Actions assigned to the project, or the full Schedule (Actions, Meetings, and Milestones).

You can delete Actions, and edit Actions from here, as needed. This table also supports inline editing, for making quick changes to your Action details.
To quickly duplicate an Action, edit the Action, make any necessary changes in the fields above, and then click Save New rather than Save Edit.

Click the Tips/Links box at the top right of the Action Assignment page to print the full Project Schedule or import it to Excel. You can also Transfer Actions from one Client/Project/Task to another Client/Project/Task, as well as transfer Actions from one assignee to another. The Preferences link gives you access to a handful of Action and Schedule preferences.

Note: Actions can also be assigned from the To-Do List (Timesheet > To-Do List), Project Schedule page (Traffic > Project Schedule), and from the Estimate page (Projects > Estimate). Assigning Actions from the Estimate page allows for an easier breakdown of your overall estimated hours into specific Action Assignments for your team.

Check Availability

As Actions are assigned to your team, you can keep track of how much work each person has assigned to them by using the Check Availability feature, located next to the Assign To: drop-down. This feature takes the total amount of estimated time for Actions due on that day, and displays that time against your team’s total work hours for the day, and for the week. It will also include any scheduled meetings that members of your team have been invited to that week.

Note: You can set employee work hours by going to Personnel > Manage, and clicking on the Set Work Hours link inside the Tips/Links box.

Using the above screenshot as an example, you can see that for the week shown, Johnny Fox had a couple of very busy days. On August 16th and 19th he had 10 hours of estimated Action time assigned to him, but he only works 8 hours a day! Using this information, you can make the necessary adjustments to balance your team’s workload. If an Action due on a specific day is left outstanding, the estimated time will accumulate on to the following day.

Action Calendar

The Action Calendar (Traffic > Calendars) gives you a visual monthly or weekly view of all your outstanding and completed actions for a given day. Use the drop-down menu at the top right to view actions assigned to All Personnel, or to filter on a specific user (refer to the Production Calendar if you want to see Meetings, Milestones, and specific Project start/due dates.)

You can pull this information in report format by clicking the Action Report link at the bottom left of the calendar, or by going to Reports > Action.
Action Alerts

FunctionFox provides email Alerts to help you keep on top of your assigned Actions. Go to Settings & Preferences, My Preferences, Alerts. Here, you have the option of receiving Alerts when an Action is assigned to you, when you assign an Action to yourself, when an Action is due, and when an Action assigned to you has been updated (the due date has changed, for example).