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

FunctionFox Task Setup

To set up Tasks for your projects, go to Projects > Tasks in the left-hand menu. Tasks are the items that time is tracked against on the Timesheet, and once set up they will help you to increase productivity by knowing where your time is being spent, create estimates on time spent in order to keep your team on track, produce real-time progress reports, and create accurate bills for your clients once projects are complete.

On the Tasks page, the Client and Project drop-down menus default to All Clients and All Projects. From here, you can create your Common Task List. Common Tasks (with or without established hourly rates) are your ‘everyday’ tasks which are available to all projects within FunctionFox.

To create a new Common Task, input the task name into the Task field. Typically, tasks are generalized processes that need to be done in order to complete a project (e.g. Design, Production, Concept Development, Client Correspondence, etc.). Once you have entered a Task name, you can attach an hourly rate by entering a value into the Hourly Rate field.

Note: Any Task with an associated rate of $0/hr will be considered non-billable.

Next, decide where you want to add this new task. Common Task List only will add this task to your Common List, and be available for all future projects. Open Projects & the Common Task List will add this task to the Common List for all future projects, as well as applying it to all of your existing open projects within FunctionFox. Click Save New.

To edit a Task name or rate, click the edit (pencil) icon next to the Task name, and make your changes in the fields at the top of the page. *Before clicking Save Edit, make sure you've chosen whether you want this change to take effect for future projects only, or to apply this change to your current projects as well.*

Note: If you choose to change an hourly rate and apply that change to your open projects, all time tracked against this Task will reflect the changed rate. If you need to split a rate (a different rate from January 1st onwards, for example), contact us with the details and we will be happy to take care of that for you.
You can only delete a Task outright if no time has been tracked against it. If you have Tasks that you no longer wish to use, let us know and we will go in and archive that Task—you will no longer see it on the Tasks page or in the Tasks drop-down on the Timesheet, but you will still be able to report on past time tracked against it. All Timesheet entries associated with an archived Task will appear locked, so you will want to make sure that any necessary Timesheet adjustments are completed before Tasks are archived.

**Client Specific Tasks & Rates**

To set up a list of Tasks and rates specific to one client, select that client from the Client drop-down on the Tasks page, and select All Projects. The Tasks and rates entered here will be applied to all projects under that specific client only.

If a Task rate is changed for a specific client, that change will take effect for all time tracked against that Task. Contact us if you need to split your rates.

**Project Specific Tasks & Rates**

To set up a list of Tasks and rates specific to one project, select the client that the project is under from the Client drop-down menu, and then select the project from the Project drop-down menu. Any Tasks and rates entered on this page will be applied to this specific project only.

If a Task rate is changed for a specific project, that change will take effect for all time tracked against that Task. Contact us if you need to split your rates.

**Copying Tasks from one Project to Another**

When opening a new project, instead of applying tasks from your Common List, you also have the option of copying over tasks from existing projects. When the Project Task box appears during project setup, simply click the link that says **Copy Tasks from Open Projects** and then choose the client/project that has the Task list you wish to apply.

**Note:** If the Project Task box does not appear, go to Settings & Preferences, Account Preferences, scroll down to Other, and make sure that **All Tasks to New Projects** is unchecked.

**Adding Tasks to an Existing Project**

To add a task from your Common List to an existing project, go to Projects > Tasks and select the client. If you would like to add a task to all projects under this client, select All Projects. Otherwise, select the specific project. Next, look for the **Common Tasks not yet in this Project** list at the bottom of the screen. Here, you will see a list of Common Tasks that have not been applied to your chosen project(s). Simply check the box next to each Task to apply them,