

Contract Tasks Table

The Contract Tasks table holds tasks for contracts.

Use Case

Contract Tasks can be created from a related table in a Contract record. If a Contract Task is created from a Contract, the link to the Contract is populated; otherwise a Contract should be selected.

The default Status for new Contract Tasks is Planned. On creation, the Assigned Person is notified of the planned task, unless the assignee is the task's creator. If no Assigned Person is chosen, the Assigned Team is notified of the planned task and asked to assign someone.

When the Advance Notification Date arrives, the Status changes to Pending. Any open Contract Tasks (those in a Status of Pending or Planned) for a canceled contract will be updated to a Status of Canceled.

Contract Task	
<div style="display: flex; justify-content: space-between; align-items: center;"><div>Save Cancel</div><div>Task Details Emails History</div><div>«» 🖨️ 📧 📅</div></div>	
ID	1
*Task Title	Follow up on support contract
Assigned Team	Admin Team
Assigned Person	Agiloft Admin
<h3>Task Details</h3>	
Status	Done
Task Type	General Task
Date Due	Apr 01 2017 16:00
Advance Notification Date	
Days to Send Reminder	7
Description	
<h3>Working Notes</h3>	
<h3>Contract Details</h3>	
Contract ID	
Contract Title	
Internal Contract Owner	
Contract Requester	
Contract Status	
<div style="display: flex; justify-content: space-between; align-items: center;"><div>Save Cancel</div><div>«»</div></div>	

Ownership

Workflow records are owned by the user the task is assigned to. Specifically, a record is owned by the user whose ID matches the Assigned Person ID field.