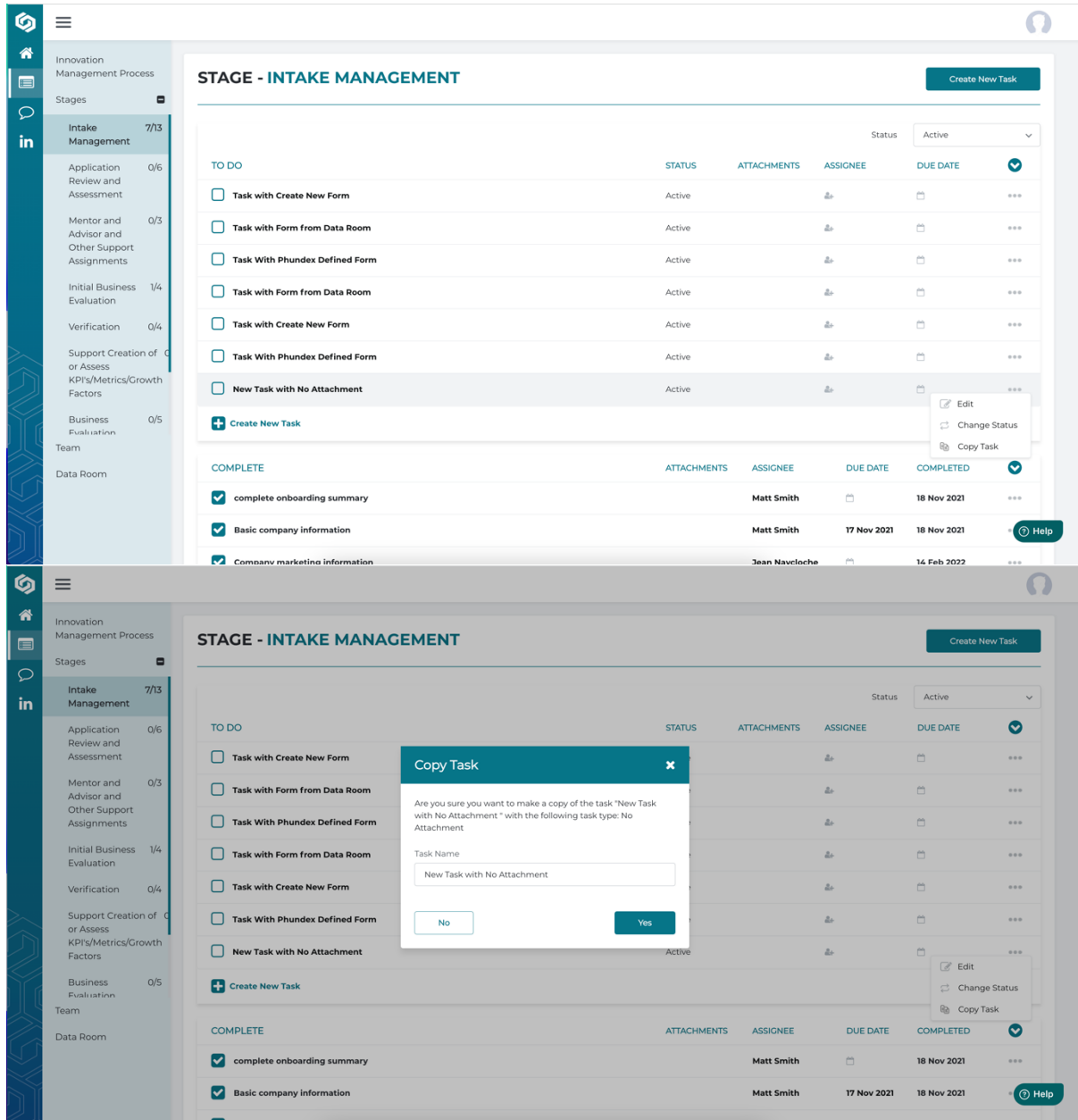


How to duplicate a Task with "No Attachment"

1. Click the ellipses beside the task
2. Select "Copy Task"
3. Name the Task
4. Click "Yes" to copy the task










The screenshot displays the 'STAGE - INTAKE MANAGEMENT' interface. On the left, a sidebar shows the 'Innovation Management Process' with 'Intake Management' selected. The main area is divided into 'TO DO' and 'COMPLETE' sections. The 'TO DO' section lists tasks with columns for STATUS, ATTACHMENTS, ASSIGNEE, and DUE DATE. The 'COMPLETE' section lists completed tasks with columns for ATTACHMENTS, ASSIGNEE, DUE DATE, and COMPLETED.



A 'Copy Task' dialog box is open, asking: 'Are you sure you want to make a copy of the task "New Task with No Attachment" with the following task type: No Attachment'. The dialog box includes a 'Task Name' field with the text 'New Task with No Attachment' and two buttons: 'No' and 'Yes'.

TO DO	STATUS	ATTACHMENTS	ASSIGNEE	DUE DATE
<input type="checkbox"/> Task with Create New Form	Active			...
<input type="checkbox"/> Task with Form from Data Room	Active			...
<input type="checkbox"/> Task With Phundex Defined Form	Active			...
<input type="checkbox"/> Task with Form from Data Room	Active			...
<input type="checkbox"/> Task with Create New Form	Active			...
<input type="checkbox"/> Task With Phundex Defined Form	Active			...
<input type="checkbox"/> New Task with No Attachment	Active			...

COMPLETE	ATTACHMENTS	ASSIGNEE	DUE DATE	COMPLETED
<input checked="" type="checkbox"/> complete onboarding summary		Matt Smith	18 Nov 2021	...
<input checked="" type="checkbox"/> Basic company information		Matt Smith	17 Nov 2021	18 Nov 2021
<input checked="" type="checkbox"/> Company marketing information		Jean Navroloche	14 Feb 2022	...







< Intake Management

Cancel

NEW TASK WITH NO ATTACHMENT

Description

Assigned To

Due Date

Stage

Intake Management

COMMENTS

Write a comment

Add Comment

Help



How to duplicate a Task with a file or Form attached from the Data Room

1. Click the ellipses beside the task
2. Select "Copy Task"
3. Name the Task
4. Name the Form
5. Click "Yes" to copy the task

STAGE - INTAKE MANAGEMENT

Stages: Intake Management (7/11)

TO DO	STATUS	ATTACHMENTS	ASSIGNEE	DUE DATE	
<input type="checkbox"/> Task with Create New Form	Active				...
<input type="checkbox"/> Task with Form from Data Room	Active				...
<input type="checkbox"/> Task With Phundex Defined Form	Active				...

COMPLETE

ATTACHMENTS	ASSIGNEE	DUE DATE	COMPLETED	
<input checked="" type="checkbox"/> complete onboarding summary	Matt Smith	18 Nov 2021	18 Nov 2021	...
<input checked="" type="checkbox"/> Basic company information	Matt Smith	17 Nov 2021	18 Nov 2021	...
<input checked="" type="checkbox"/> Company marketing information	Jean Navcloche	14 Feb 2022	14 Feb 2022	...
<input checked="" type="checkbox"/> Management team information	Matt Smith	18 Nov 2021	18 Nov 2021	...
<input checked="" type="checkbox"/> company stage	Matt Smith	18 Nov 2021	18 Nov 2021	...
<input checked="" type="checkbox"/> Seeking Support?	Matt Smith	18 Nov 2021	18 Nov 2021	...

STAGE - INTAKE MANAGEMENT

Stages: Intake Management (7/16)



Copy Task





Are you sure you want to make a copy of the task "Task with Form from Data Room" with the following task type: Attach File or Form from Data Room

Task Name: Task with Form from Data Room

Form Name *: Form From Data Room

No Yes






< Intake Management

Overview

Form

Permissions


Audit Trail



FORM FROM DATA ROOM

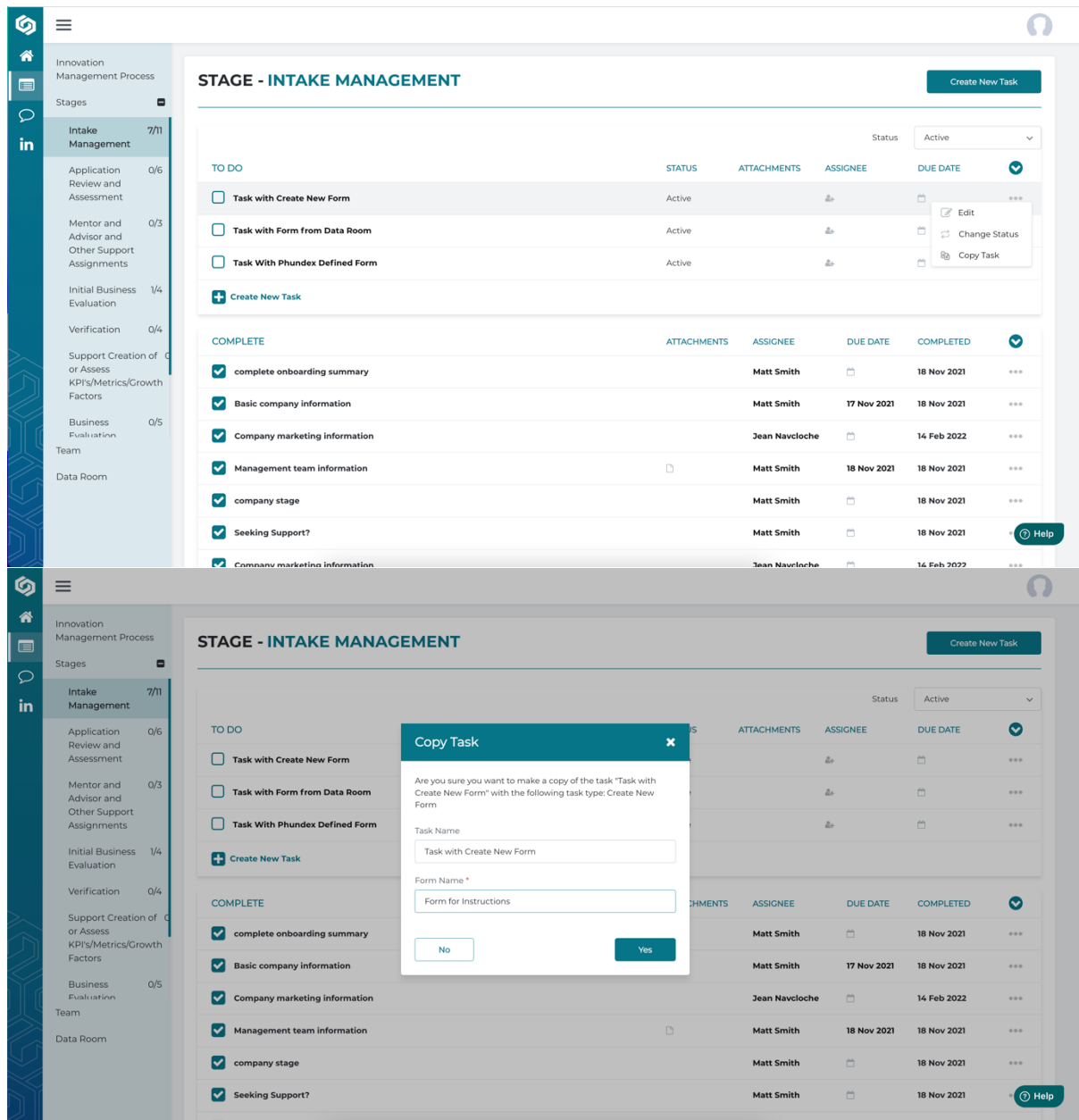
Company Stage *

Select









How to duplicate a Task with a Form you created

1. Click the ellipses beside the task
2. Select "Copy Task"
3. Name the Task
4. Name the Form
5. Click "Yes" to copy the task



The screenshot displays the 'STAGE - INTAKE MANAGEMENT' interface. On the left, a sidebar lists various stages including 'Intake Management', 'Application Review and Assessment', 'Mentor and Advisor and Other Support Assignments', 'Initial Business Evaluation', 'Verification', 'Support Creation of or Assess KPIs/Metrics/Growth Factors', 'Business Evaluation', 'Team', and 'Data Room'. The main content area shows a table of tasks under the 'TO DO' section. The tasks are: 'Task with Create New Form', 'Task with Form from Data Room', and 'Task With Phundex Defined Form'. A context menu is open for the first task, showing options: 'Edit', 'Change Status', and 'Copy Task'. Below the 'TO DO' section, there is a 'COMPLETE' section with a list of tasks including 'complete onboarding summary', 'Basic company information', 'Company marketing information', 'Management team information', 'company stage', 'Seeking Support?', and 'Company marketing information'. A 'Copy Task' modal dialog is overlaid on the interface, asking 'Are you sure you want to make a copy of the task "Task with Create New Form" with the following task type: Create New Form'. The dialog includes fields for 'Task Name' (Task with Create New Form) and 'Form Name' (Form for Instructions), and buttons for 'No' and 'Yes'.






< Intake Management

Overview

Form

Permissions

Audit Trail



FORM FOR INSTRUCTIONS

What's your Favourite Food? *

What's your Favourite Colour? *

Date of Birth *

Select Date


What sports do you like the most? *

☐ Hockey

☐ Basketball

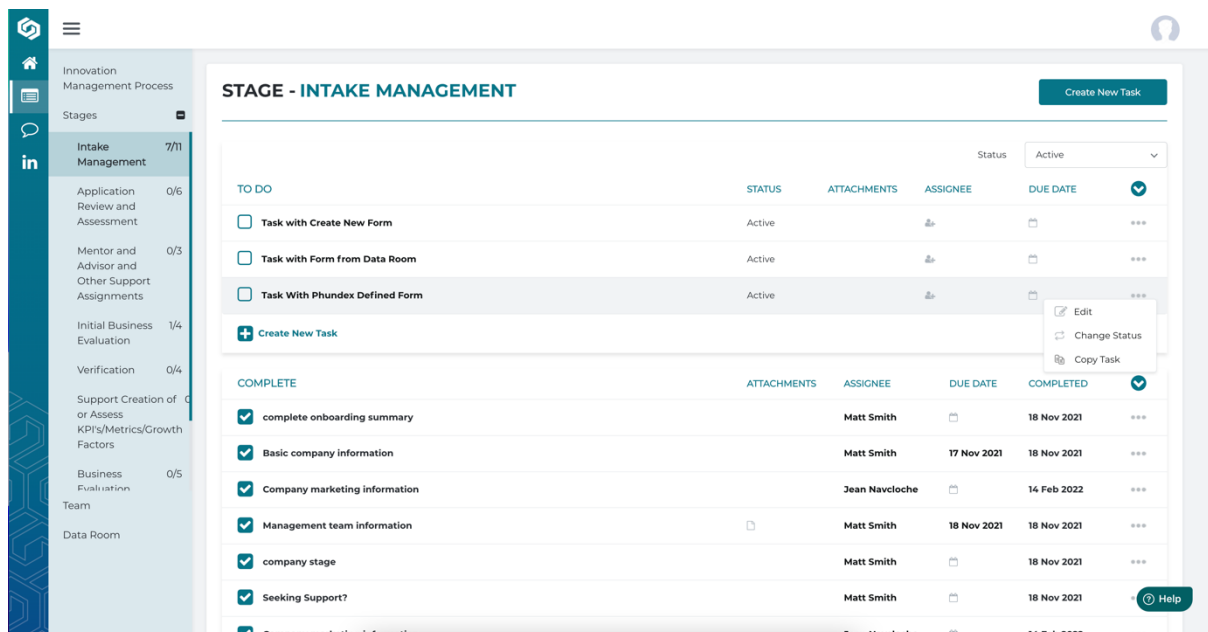
☐ Skiing

☐ Football

 Help

How to duplicate a Task with a Phundex Defined Form

1. Click the ellipses beside the task
2. Select "Copy Task"
3. Name the Task
4. Name the Form
5. Click "Yes" to copy the task



STAGE - INTAKE MANAGEMENT

Stages: Intake Management (7/11)

Application Review and Assessment (0/6)

Mentor and Advisor and Other Support Assignments (0/3)

Initial Business Evaluation (1/4)

Verification (0/4)

Support Creation of or Assess KPIs/Metrics/Growth Factors (0/5)

Business Evaluation (0/5)

Team

Data Room

TO DO

Task	Status	Attachments	Assignee	Due Date	Options
<input type="checkbox"/> Task with Create New Form	Active				...
<input type="checkbox"/> Task with Form from Data Room	Active				...
<input type="checkbox"/> Task With Phundex Defined Form	Active				...

COMPLETE

Task	Attachments	Assignee	Due Date	Completed	Options
<input checked="" type="checkbox"/> complete onboarding summary		Matt Smith	18 Nov 2021	...	
<input checked="" type="checkbox"/> Basic company information		Matt Smith	17 Nov 2021	18 Nov 2021	...
<input checked="" type="checkbox"/> Company marketing information		Jean Navcloche	14 Feb 2022	...	
<input checked="" type="checkbox"/> Management team information		Matt Smith	18 Nov 2021	18 Nov 2021	...
<input checked="" type="checkbox"/> company stage		Matt Smith	18 Nov 2021	...	
<input checked="" type="checkbox"/> Seeking Support?		Matt Smith	18 Nov 2021	...	
<input checked="" type="checkbox"/> Company marketing information		Jean Navcloche	14 Feb 2022	...	



Copy Task



Are you sure you want to make a copy of the task "Task With Phundex Defined Form" with the following task type: Add a Phundex Form



Task Name
Task With Phundex Defined Form



Form Name *
Defined Form

No Yes









< Intake Management

Overview

Form

Permissions

Audit Trail

DEFINED FORM

Search Company

Legal Company Name *

Trading As

Incorporation Number

134782828290

Jurisdiction *

Select

Address Line 1

Address Line 2

Town

County / State / Province

Postcode

Country

Select

Business Type

Select

Business Structure

Select

Sector

Date Incorporated

Help