



### FAQ For Duplicating Tasks

Task duplication will be offered for the tasks that were created using one of the following ways:

- No Attachment required for the task but any document attached to the original task won't be included
- Attachment Required for the task but any document attached to the original task won't be included
- Upload file required for the task- but any document attached to the original task won't be included
- Create New Form (copying the form from the original task)
- Add a "Phundex Form" the **2 predefined form are "Basic Company Information" and "Company Marketing Information"**-
- When you copy Task, you should name the Task name as you are making the copy and must add a new Form Name

Task duplication will **NOT** be offered for the tasks that were created using one of the following ways:

Attach File or Form from Data Room

since the latest version uploaded in the task may not be the one required in the duplicated task.

yes, that is correct - the request is that the team member adds a document. the task instruction should explain what document they need to load up from their files. as long as you don't pick up any document that has been added to that task, it will be fine.

For example, I want the hotel manager to provide a short report with hotel occupancy every month. I have three hotels and I need the report every month, so I want to be able to duplicate the task for each manager so they can upload their report for this month. The task description tells them what document I want to see, the upload document button reminds them they need to attach \*upload) the document and I want that instruction to go to each of them.

This is true for the "upload file" and for the "Attachment required" boxes.

note - this is a workaround for repeating tasks which are a separate item but same concept.