



Task Coach – Quick Reference Card

Tasks

In **Tasks viewer** (See [Viewers](#)), use icons or menu commands:

- New task** *or* **Task > New task**
- New subtask** *or* **Task > New subtask**
- Edit task** *or* Double-click task *or* **Task > Edit task**
- Delete task** *or* **Category > Delete**

New task and Edit task dialog boxes:

- Subject** – Enter task name
- Description** – Add details (They appear when mouse hovers over)
- Dates** – **Start, Due, Completion** – Click to display calendars
- Categories** – Select category to assign to task (See [Categories](#))
- Budget** – Add/Edit/Delete budget detail (See [Budget](#))
- Effort tracking** – Start/stop (See [Effort Tracking](#))
- Notes** – Add/Edit/Delete notes to attach to a task (See [Notes](#))
- Attach** – Add/Open/Delete attachments (See [Attachments](#))
- Behavior** – Mark task complete if all children are complete:
Y/N/Use app-wide setting (See [Preferences](#))

Categories

In **Categories Viewer** (See [Viewers](#)), use icons or menu choices:

- New category** *or* **Category > New category**
- New subcategory** *or* **Category > New subcategory**
- Edit category** *or* Double click category *or* **Category > Edit**
- Delete category** *or* **Category > Delete**
- Add note** *or* **Category > Add note**
- Attach file** *or* **Category > Add attachment**
- Assign color to category:** Double-click on it, then **Use this color**
- Assign category/subcategory to task/subtask:**
Double click task/subtask and select **Categories**.
Select categories from list or click to create a new one.

Budget

- Click to access budget fields in the **New/Edit task** dialog box:
 - Budget** – Enter hh:mm:ss expected for this task
 - Time spent** – Tracked effort (See [Effort tracking](#))
 - Budget left:** Calculated as **Budget** – **Time spent**
 - Hourly fee:** Enter dollar amount revenue per hour.
 - Fixed fee:** Enter fixed dollar amount of revenue per task
 - Revenue:** Calculated as **Fixed Fee** + (**Hourly Fee** * **Time spent**)

Keyboard Shortcuts

General

- Open a task file** CTRL+O
- Close a task file** CTRL+W
- Save a task file** CTRL+ S
- Save task file as** CTRL+SHIFT+S
- Print a task file** CTRL+P
- Page setup** CTRL+SHIFT+P
- Quit Task Coach** CTRL+Q
- Help** CTRL+SHIFT+H

Edit

- Edit** ENTER
- Cut** CTRL+X
- Copy** CTRL+C
- Paste** CTRL+V
- Undo** CTRL+Z
- Redo** CTRL+Y

Tasks

- Mark Task Complete** CTRL+ENTER
- Increase priority** CTRL+I
- Decrease priority** CTRL+D
- Maximize priority** CTRL+SHIFT+I
- Minimize priority** CTRL+SHIFT+D

Tasks, Categories, Notes

- New item** CTRL+INS
- New subitem** CTRL+SHIFT+INS
- Delete item** CTRL+DEL
- Collapse all items** CTRL+SHIFT+C
- Expand all items** CTRL+SHIFT+E

Effort Tracking

- Track the time spent on a task (hh:mm:ss).
(Enable this feature in [Preferences – Features](#).)
- Click to **Start tracking**
- Click to **Stop tracking**
- View tracked effort in the **Effort viewer**
- Edit tracked effort: Double-click line item
in **Effort Viewer** and change values.

Viewers

Open a viewer: **View > New viewer > Select viewer** (Can have multiple viewers open in any configuration.)

Task viewer: Shows tasks as hierarchy or simple list.

Categories viewer: Shows categories and subcategories.

Timeline viewer: Shows task timelines from creation to completion.

Effort viewer: Shows tracked tasks and the time spent.

Notes viewer: Shows notes independent of tasks or categories.

Rearrange viewers: Drag & drop viewers around the screen.

Display fields: Right click on header row. Select fields to display.

Sort viewer contents: Click on a column header to sort by it.

Filter tasks: **View > Filter >**

Show only tasks due before the end of:

Unlimited, Today, Tomorrow,
Work week, Week, Month, Year

Hide tasks that are: Active, Inactive,
Completed, Over due, Over budget

To view tasks and notes by category:

Select categories in Categories viewer.

Notes

Notes & subnotes can be independent or added to tasks & categories.

Notes viewer displays independent notes & subnotes.

Independent notes:

 **Add note** *or* **Note > New note**




 **Add subnote** *or* **Note > New subnote**

 **Edit note** *or* **Note > Edit note**

 **Delete note** *or* **Note > Delete note**

Email note *or* **Note > Email note** (See [Email](#))


Notes attached to tasks or categories:

- Right-click on a task or category and choose  **Add Note** *or*
- Create new or open existing item and click  **Notes** in **New/Edit** item dialog box. Click .

Attachments

Attach file, URL, or email address to a task, note, or category:

Right-click on the item in its viewer & select  **Attachments**.

Open attachment: Double-click on the item & click  **Attachments**.


Select the attachment and click .

Email

TC integrates with Outlook & Thunderbird email user agents.

 **Attach an email to a task, note, or category:** Either

- Drop email onto task, note, or category in the viewer *or*
- Drop in attachment pane in New/Edit dialog box

 **Create new item from an email:** Drop email on an empty part of a viewer to create a new item with email attached.

Exporting

Export tasks, notes, categories, effort:

Export all or only selected items into HTML or CSV files.
Exports only columns currently shown in the viewer.

File >  **Export >**

- Export as HTML / Export selection as HTML
- Export as csv / Export selection as csv

Preferences

SET PREFERENCES: Click **Edit > Preferences**

Window behaviors

Show splash screen/tips on startup: Y/N
Start w/ main window iconized: Y/N/Last
Hide main window when closed: Y/N
Show popups when hovering: Y/N
Check for new version at startup: Y/N
Use tabbed interface: Y/N (Restart req.)
Make clock in taskbar tick: Y/N

Files Settings

Auto save after every change: Y/N
Create backup before overwriting: Y/N
Max number of files to remember: 0-9
Save settings in same directory as program: Y/N
Attachment base directory: Enter path

Task behavior

Mark parent task completed when all children are completed: Y/N. (This global setting but can be over-ridden for each task individually. See **Tasks – Behavior**)

Language

Select language: From 47 available.
(Restart TC for the change to take effect.)

Colors

Set colors for tasks that are: Active, Inactive, Completed, Over due, Due today

Features Turn features on/off:

Tracking effort, Taking notes, SyncML, Start/End hours, iPhone synchronization, Minutes between task start & end times