



Flowcharts typically contain little more than boxes with text on them. They do provide value, but so much information is missing.

**TaskMap® Lite** leaps beyond ordinary flowcharts because each Task shape contains key data about a step in the process. The resulting collection of data-rich Tasks means that every TaskMap becomes the central repository for all knowledge about a process.

**TaskMap Lite** is free and offers the core features of TaskMap, but there's more capability whenever you're ready.

**TaskMap Standard** and **TaskMap Professional** extend the capabilities of TaskMap Lite to include additional pre-defined data fields; user-defined data fields; extensive reporting; integration with Excel, PowerPoint, and Project; advanced hyperlinking; automatic Task numbering, and much more. Visit [www.TaskMap.com](http://www.TaskMap.com) for details.

TaskMap Lite features are derived entirely from Visio smart shapes – there is no software involved. The no-code approach means that TaskMap Lite works with any version of Visio, but there are a couple of things to note:

- Role names must be typed into the appropriate field in each Task; there is not a central, shared list of role names.
- The Connector shape was designed for the five pages in the TaskMap Lite template. Page names can be changed but the Connector will not recognize the addition or deletion of pages.
- Tasks must be renumbered manually.
- Task Link arrows may change position when you add Roles, Guidelines, and Resources to a Task. You can eliminate this behavior by gluing the ends of each Task Link to the connection points on the other shapes.

None of these limitations exist in TaskMap Standard or TaskMap Professional.



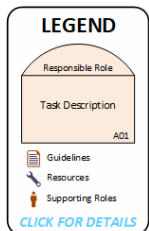
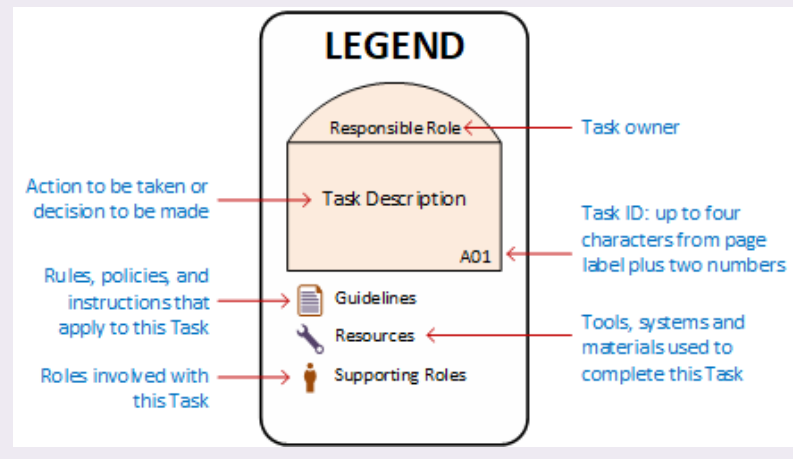
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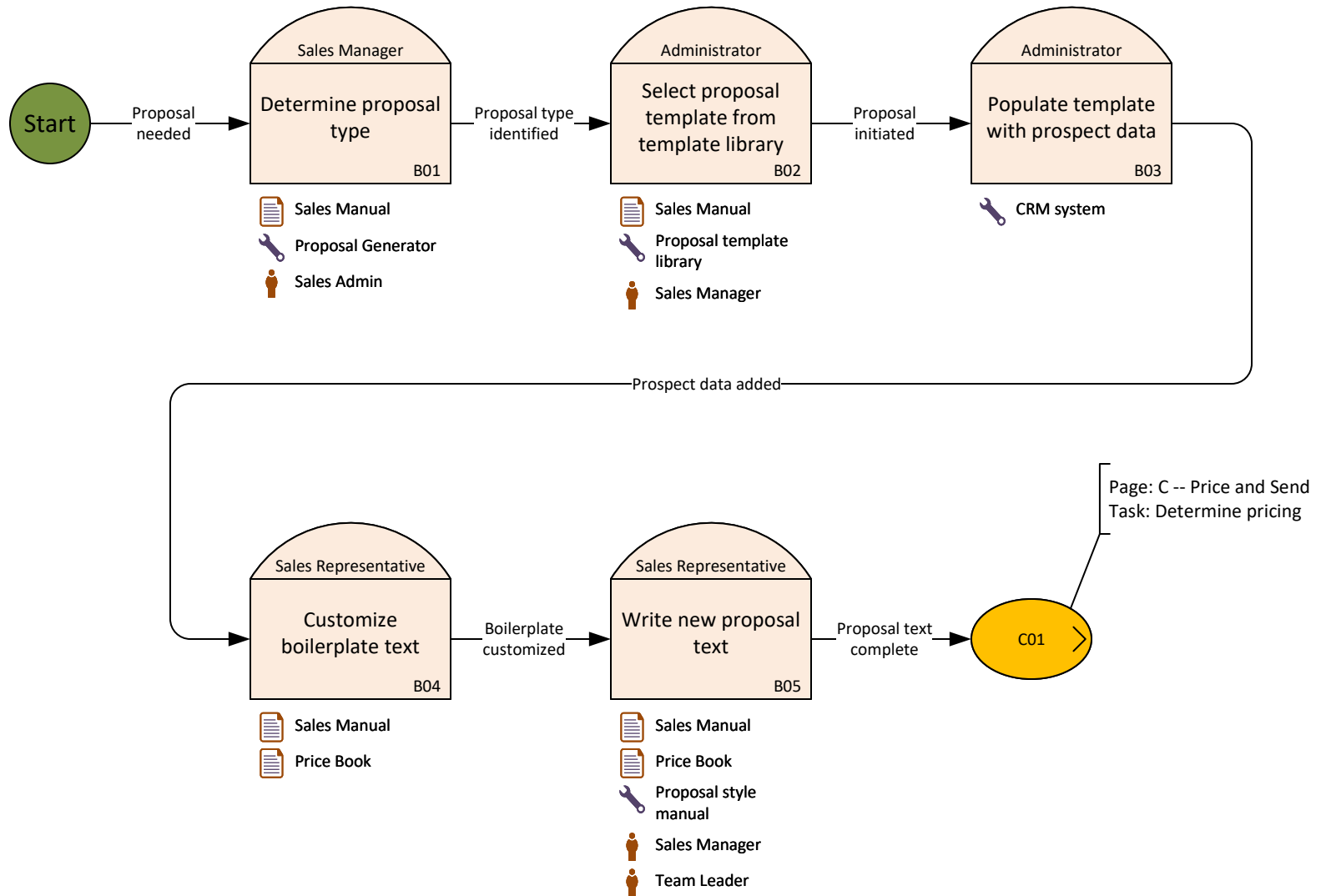
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## Quick Start Guide (delete after reading to reuse this page)

- Drop a **Start** shape and multiple **Task** shapes onto a page.
- Select a **Task** and either start typing or use the Shape Data window to enter a Task Description.  
**TIP:** Start your **Task Description** with an action-oriented verb and describe either the action to be taken or the decision to be made.  
**TIP:** Right-click a shape, then select *Data>Shape Data* to open the **Shape Data window**.
- Use the **Legend** below as a guide to entering additional details for each Task. Optional: select any Task data attribute and use *Ctrl+K* to add a hyperlink.
- Glue the ends of each **Task Link** to any of the inbound connection points on the left or outbound connection points on the right of each shape.  
**TIP:** Use the **Task Link Description** to tell what happened in the previous Task or needs to happen in the next Task.
- Drop a **Connector** shape at each place where the process continues to another page or enters from another page, then use the Shape Data window to indicate the target page and Task ID.  
**TIP:** Select a Task to see its **Task ID** in the Shape Data window, or display the Task ID on the right-click menu.
- Attach a **Label** shape and to each Connector to see additional information about the hyperlink target.
- Drop an **End** shape at the end of the process.



# Prepare Proposal for New Prospect – Phase 1



# Prepare Proposal for New Prospect – Phase 2

Page: B -- Create Proposal  
Task: Write new proposal text

