# Tasks and activities

September 11, 2026

# Tasks and activities

## Tasks and activities at a glance

A task is a piece of follow-up work with an owner, dates, a status, and an importance value. An activity is a Visit, Meeting, Call, or Mail record used to keep follow-up work visible. .

Use the lists after the main work that creates the follow-up: use Tasks for work that needs an owner and a due date, and use Activities for contact or communication work that needs to remain visible. .

| If you need to… | Go to |
|---|---|
| Review assigned or shared follow-up work | Work with tasks |
| Review a Visit, Email, Meeting, or Call | Work with activities |
| Understand the list headers and row information | Understand the lists |
| Create a task | Create a task |
| Create an activity | Create an activity |
| Understand activity statuses | Activity status |
| Use the broader task workspace | My Desk tasks |
| Use the broader activity workspace | My Desk activities |

Before opening a list, check the conditions in Before you start.

## Before you start

### Prerequisites

| Have this ready | Why it matters |
|---|---|
| Access to the Tasks or Activities feature | The list and its actions are gated by the feature subscription. |
| A list with its columns visible | Actions in a row menu require the list to have a usable layout. |
| The correct branch and ownership context | Task and activity actions check branch membership and ownership before they are offered. |
| A row in the appropriate state | **Complete** applies to a task that is not complete; **Un complete** applies to a completed task. |

List filters and actions in a row menu appear only when the applicable list, layout, branch,
and ownership conditions are met. Activity deletion also requires a non-Mail activity.
.

With those conditions in place, continue to Find the task or activity list.

# Find the task or activity list

Tasks and Activities are lists of follow-up records. Open the list that matches the work you need to review. .

## Open and filter a list

Open the appropriate list to locate existing follow-up work.

### Prerequisites

- Know whether you are looking for a task or an activity.

### Steps

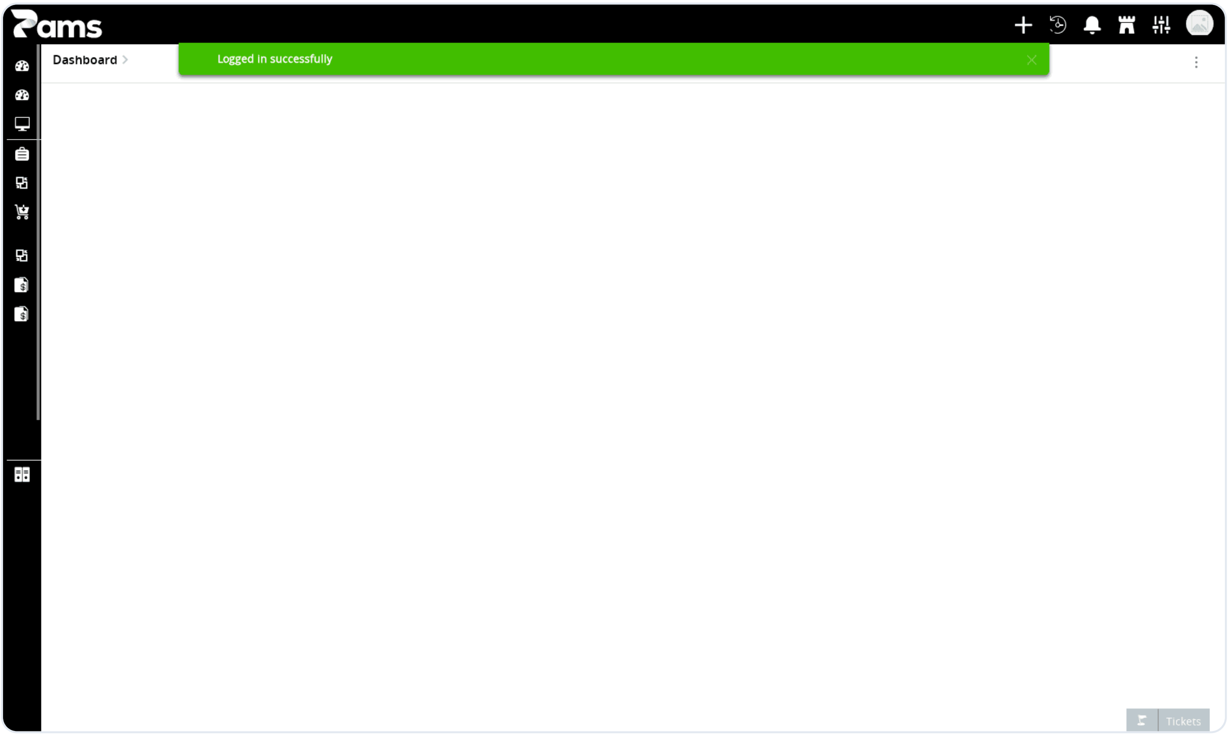
1. Open the Tasks list when you need task follow-up work.
2. Select one task-list option from the table.

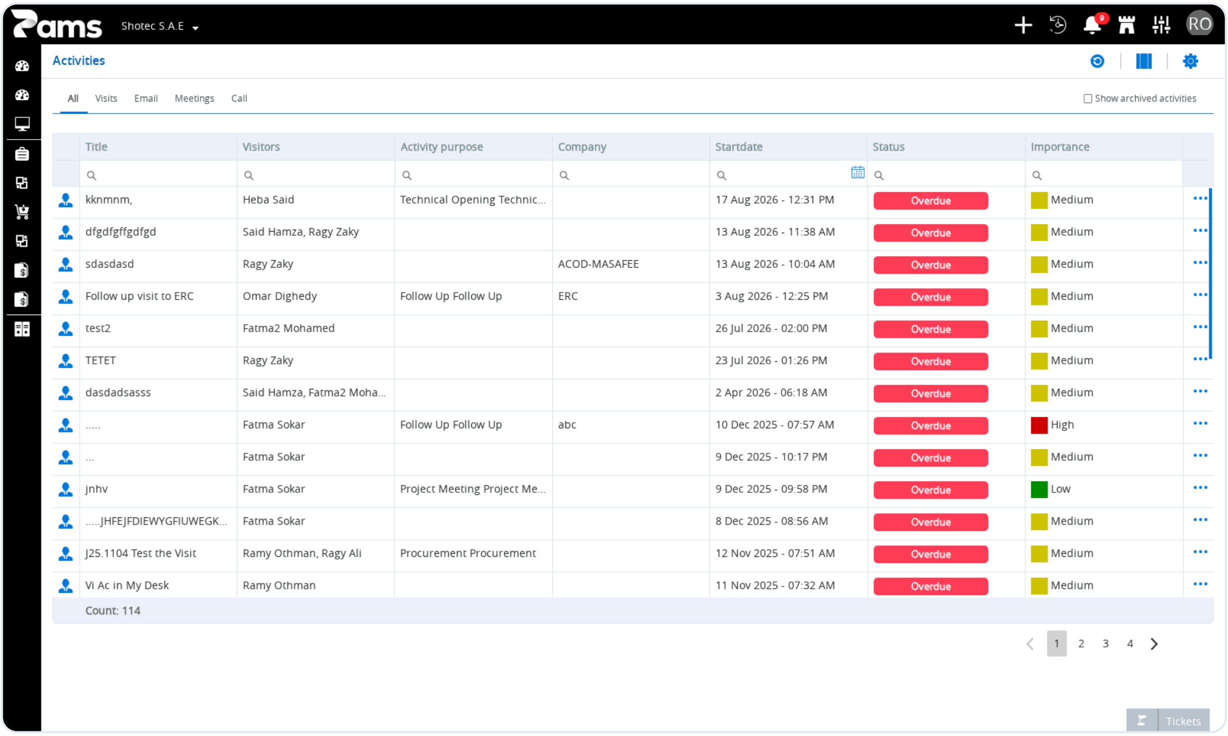
| If you need to… | Select |
|---|---|
| Review every task in the list | **All** |
| Review tasks assigned to you | **My Tasks** |
| Review completed task work | **View completed tasks** |

3. Open the Activities list when you need activity follow-up work.

4. Select one activity-list option from the table.

| If you need to… | Select |
|---|---|
| Review every activity type | **All** |
| Review visits | **Visits** |
| Review email activities | **Email** |
| Review meetings | **Meetings** |
| Review calls | **Call** |
| Include archived activities | **Show archived activities** |






**Result:** The selected list displays the follow-up records for the option you chose.

Read the headers and row values next in Understand the lists.

# Understand the lists

The Tasks list shows task work in rows. The Activities list groups activity work by type and
status. The headers tell you which part of a follow-up record each value represents. .

## Tasks list

The Tasks list currently shows these headers:

| Header | What it identifies |
|---|---|
| Title | The task's purpose. |
| Owner | The person responsible for the task. |
| Start date | When the task starts. |
| Due date | When the task is due. |
| Status | The task's current status. |
| Importance | The task's importance value. |

The list also shows the buttons **Refresh**, **Table Layout**, and **Settings**. .

The completed-task view can contain rows with `Completed` status. .

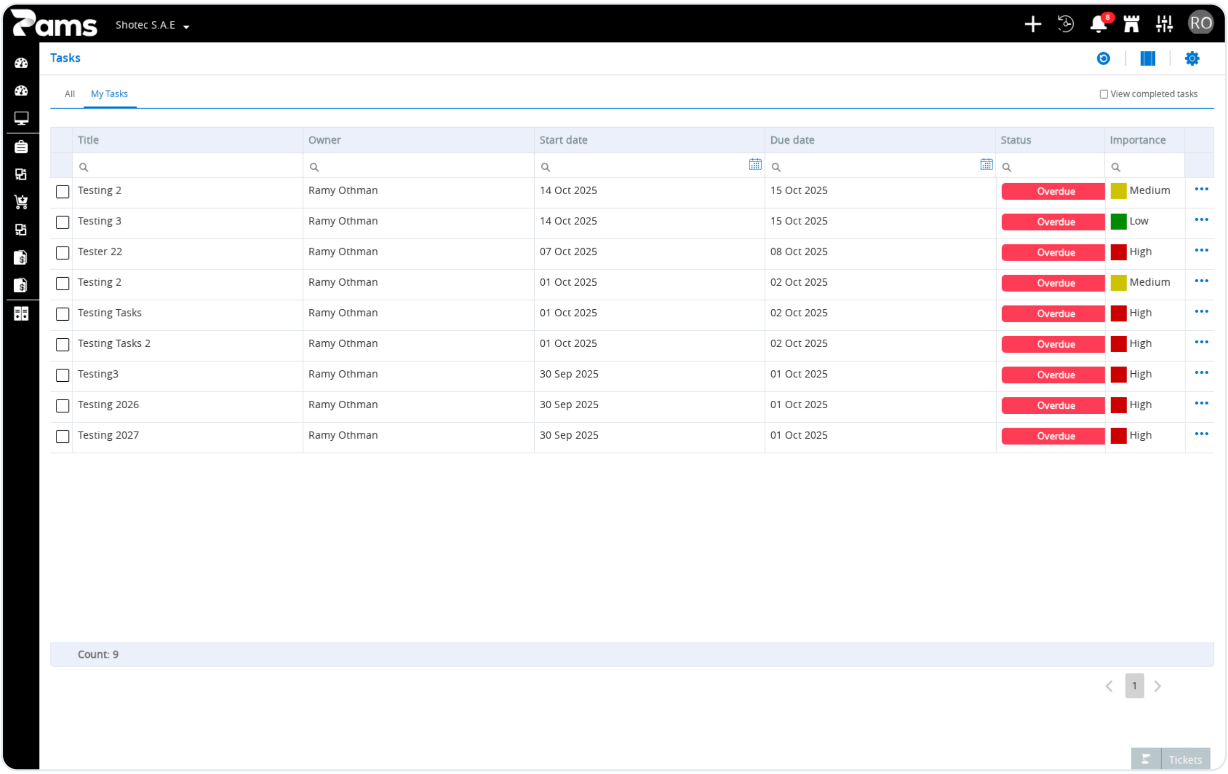
### Activities list

Activity status values are `Planned`, `Overdue`, `Done`, `Due`, and `Cancelled`.
Use the status value in a row to understand whether the activity is upcoming, due, late, finished, or cancelled. .

Activity types include All, Visits, Email, Meetings, and Call. .

The list layout can determine which activity columns appear. Work from the headers visible in your list rather than expecting a fixed set of activity columns. .

The list screens do not present a form for entering task or activity details. Use Create a task or Create an activity when you need to enter a new record. .




## Work with tasks

For task work, choose a filter before opening an action in a task row. .

## Filter tasks and review completed work

### Prerequisites

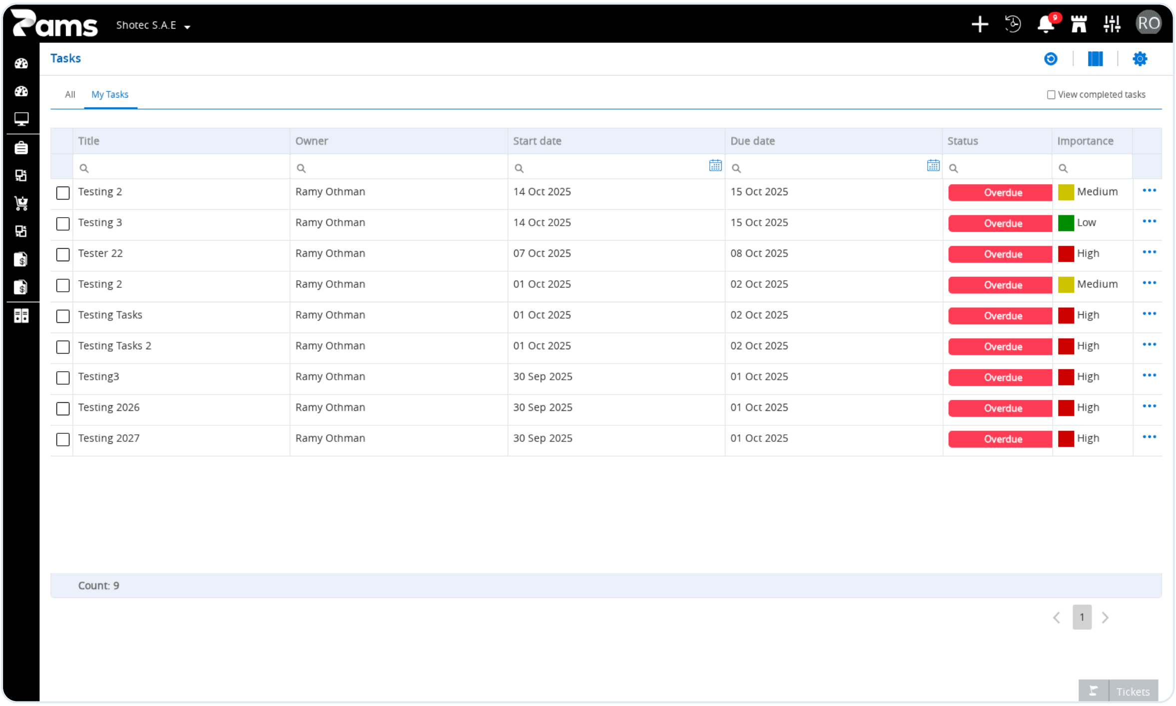
- Open the Tasks list.
- Open a task list with its columns visible.

### Steps

1. Select one task filter.

| If you need to… | Select |
|---|---|
| Review all task rows available to the list | **All** |
| Review task rows assigned to you | **My Tasks** |
| Review completed task work | **View completed tasks** |

2. Read Status and Importance in the row before choosing an action.




**Result:** The Tasks list shows the task set selected by the filter, with Status and Importance available in the row.

When you are ready to act, continue with Use an action in a task row.

## Use an action in a task row

### Prerequisites

- Open the action menu in a task row.
- Belong to the same branch as the task when the action requires it.
- Be the task owner when the action requires ownership.

### Steps

1. Select one action in the task row menu.

| If the task is… | Select |
| --- | --- |
| Not complete | **Complete** |
| Complete | **Un complete** |
| Owned by you and in your branch | **Delete** |
| Ready for list export and the action is displayed | **Export** |

**Result:** The selected task-list action is applied when its row and workspace conditions allow it. .

For contact follow-up, continue with Work with activities.

## Work with activities

For activity work, filter by type before reviewing status or taking an action in a row.
.

### Filter activities and include archived work

### Prerequisites

- Open the Activities list.

### Steps

1. Select one activity type from the table.

| If you need to… | Select |
| --- | --- |
| Review every activity type | **All** |
| Review visits | **Visits** |
| Review email activities | **Email** |
| Review meetings | **Meetings** |
| Review calls | **Call** |

2. Select **Show archived activities** when archived activity records belong in the list.
3. Read the activity's Status value after the list refreshes.

**Result:** The Activities list shows the chosen activity type and includes archived records
when **Show archived activities** is selected. .

To remove an eligible activity, continue with Delete an activity.

### Delete an activity

#### Prerequisites

- Open the action menu in an activity row.
- Belong to the same branch as the activity.
- Own the activity.
- Confirm that the activity is not a Mail activity.

#### Steps

1. Select **Delete** for an activity in your branch that you own and that is not a Mail activity.

**Result:** The activity deletion action starts when the row satisfies the branch, type, and ownership conditions. .

If the action is unavailable, use When list work goes wrong.

## When list work goes wrong

Use the message text below to identify the condition that stopped an action. The task list
can also fail silently when its action path does not provide a success or error message.
.

| What you see | What it means | What to do |
|---|---|---|
| `Only task owner can take that action` | The task action requires the task owner. | Open the task as its owner or use an action available to your role. |
| `Task deleted successfully` | The task deletion completed. | Return to the list and locate the remaining task rows. |

| What you see | What it means | What to do |
| --- | --- | --- |
| `Error while deleting task` | The task deletion did not complete. | Check the task's ownership and branch conditions before trying again. |
| `Action not allowed` | The activity action is not permitted. | Check the activity's branch, type, and ownership conditions. |
| `Forbidden characters detected. Please remove them and try again.` | The activity action received forbidden characters. | Remove the forbidden characters and submit the action again. |
| `Your request was completed successfully` | The activity request completed. | Continue with the updated Activities list. |
| `NO Data to Export` | The export action found no data to export. | Apply a list filter that returns rows, then select **Export** when it appears. |

The following messages belong to the linked creation and mail procedures:

| Owning page | Message |
| --- | --- |
| New activity | `This action is only allowed if you belong to that branch` |
| New activity | `One topic and at least one note is required` |
| New activity | `There is no topic to print` |
| New activity | `Data saved Successfully` |
| Mail activity | `Email Sent successfully` |

## What to do next

When you need a new follow-up record, use Create a task or Create an activity. When you need to interpret an activity's lifecycle value, use Activity status. .

For the wider work area, continue to My Desk tasks or My Desk activities. .