Task — Overview

August 18, 2026

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User Guide › Task

Overview

The Task area provides a central view of task records used to track work requiring attention across business operations. Tasks can be reviewed from the task list and opened as individual records for updating.

Sales representatives, purchasing officers, warehouse managers, project managers, and finance officers can use tasks to follow operational work through to completion. Task records may be associated with Tickets, helping users manage outstanding activity alongside related service or operational issues.

Tasks can be saved while still in progress, saved and closed when no further editing is required, or marked as complete when the work has been finished.

What you can do here

- Use **Select** to choose task records from the list.
- Use the **Search box** to find tasks.
- Use **Previous Page, Page 1**, and **Next Page** to move through pages of task records.
- Select **Tickets** to access tickets related to task activity.
- Select **Save** to save changes to a task record.
- Select **Save and Close** to save changes and close the task record.
- Select **Consider As Complete** to mark a task as complete.

Related pages

- Tasks

- Tasks
- **Task — Learning Path**