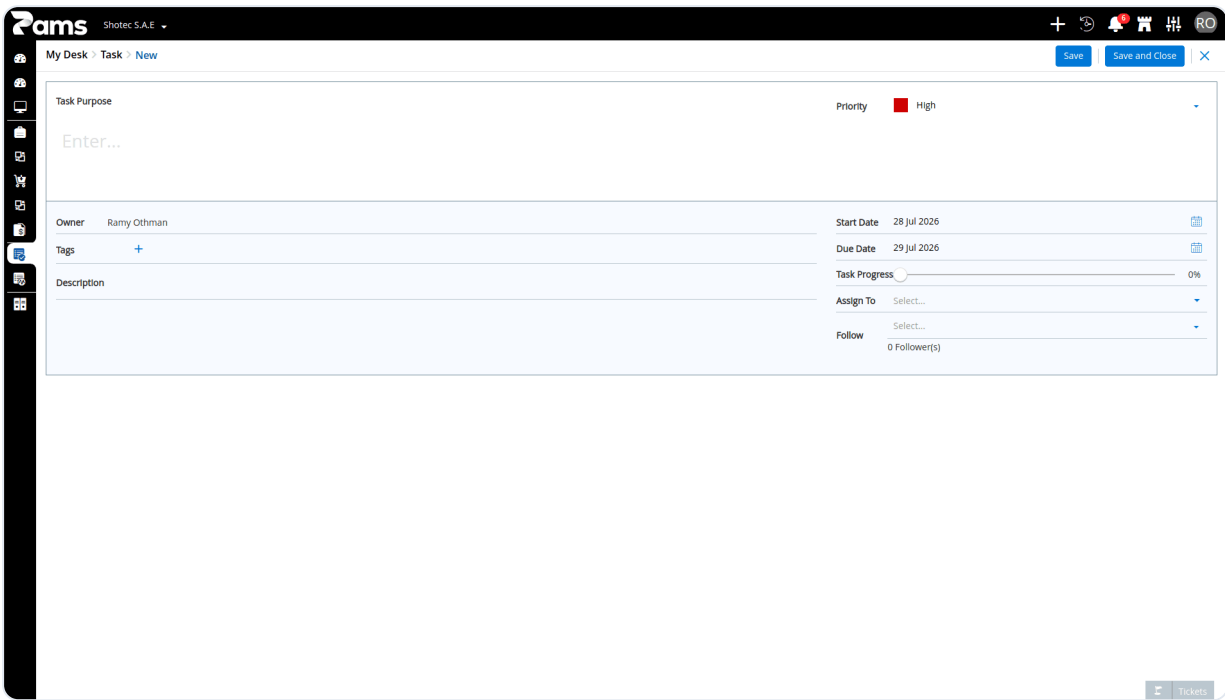


# Task

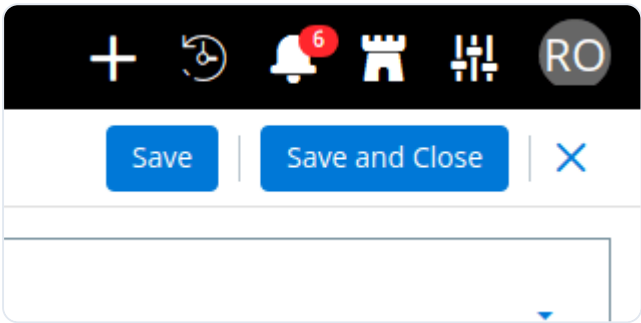
July 29, 2026

## Task

Applications > Add new > My Desk



Task — Add new > My Desk > Task



## Overview

Use **Task** to create and save a task record from **Add new > My Desk > Task**. This screen is intended for users who need to record task information during day-to-day work, including Sales, PM, Purchasing, Warehouse, Finance, and related operational activities. Complete the available entry and selection fields, attach supporting files when required, and save the record for later access.

## Workflow

1. Open **My Desk**, then select **Task** from the available application controls.
2. Enter the task information in **Enter...**

Use this field to provide the information required for the task record. Review the entered content before saving.

3. Decide whether the task requires a selection from the available options.
  - If a selection is required, use **Select...** and then choose **Select**.
  - If the application presents a confirmation action after your selection, use **Ok** to confirm it.

**Note:** The available options shown after selecting **Select...** depend on the records available in your system.

4. Decide whether supporting documents are needed.
  - To include files with the task, use **Attach** and add the required file or files to **files[]**.
  - If no supporting documentation is required, leave **files[]** empty.

**Tip:** Attach documents that are directly relevant to the task so that other users can review the same supporting information.

5. Decide how to finish the task entry.
  - Select **Save** to store the task and remain on the Task screen. Use this option when you need to review the saved record or continue working with it.
  - Select **Save and Close** to store the task and close the current entry. Use this option when the task details are complete.
6. If you need to work with tickets while using the task screen, select **Tickets**. The available screen information does not define which ticket fields or actions are

available after opening this control.

**Warning:** Do not assume that a task is saved until you select either **Save** or **Save and Close**.

## Examples

A Project Manager needs to record a task related to reviewing documents for a sales job.

1. Navigate to **Add new > My Desk > Task**.
2. In **Enter...**, enter: `Review supplier documents for sales job`.
3. In **Select...**, choose the appropriate available option by selecting **Select**. If confirmation is requested, select **Ok**.
4. Use **Attach** to add the supplier document file to **files[]**.
5. Select **Save and Close** after confirming that the task description, selected value, and attached document are correct.

The task record is then stored with its entered information and any attached file.

## Tips

**Tip:** Use **Save** when you want to keep the Task screen open after storing the current entry.

**Note:** Use **Save and Close** only after you have completed the required task information and file attachments.

**Warning:** If a file is required as supporting evidence, attach it before saving the task. The screen does not show a separate attachment step after the record is closed.

## Troubleshooting

| Symptom                                          | Likely cause                                                            | Fix                                                                                                          |
|--------------------------------------------------|-------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------|
| The task entry is still open after saving.       | <b>Save</b> was selected instead of <b>Save and Close</b> .             | Select <b>Save and Close</b> when the task is complete and you want to close the entry.                      |
| The task does not include the required document. | The file was not added through <b>Attach</b> before the task was saved. | Use <b>Attach</b> to add the document to <b>files[]</b> , then select <b>Save</b> or <b>Save and Close</b> . |
| A required selection has not been made.          | <b>Select...</b> was not completed or confirmed.                        | Use <b>Select...</b> , choose <b>Select</b> , and use <b>Ok</b> if the application requests confirmation.    |

## Related pages

- **Call**
- [Add new — Overview](#)
- [Add new — Learning Path](#)
- [Contact](#)
- **Payment**
- [Direct Order](#)
- [Process](#)