Tasks

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Tasks

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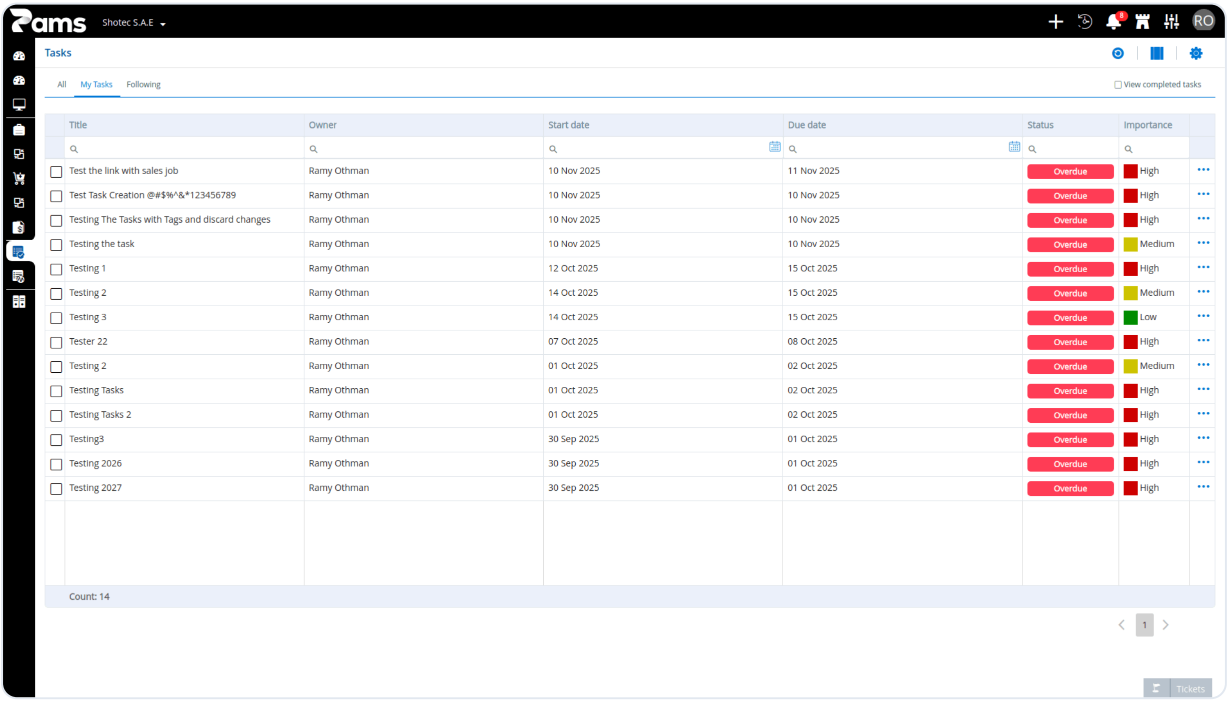

Tasks — Tasks

Overview

Use the Tasks application to review task records and work from a structured list of task titles, owners, start dates, due dates, statuses, and importance. Sales, project, purchasing, warehouse, and finance users can use this view to locate relevant work, focus on due dates, and prepare task information for review or export. Use saved layouts to keep the list columns arranged for a particular operational purpose.

Workflow

1. Open **Tasks** from the main navigation to review the available task records. Use the list columns—**Title**, **Owner**, **Start date**, **Due date**, **Status**, and **Importance**—to identify the task that requires attention.

   > **Tip:** Review the due date together with the status before prioritising follow-up work.

2. When you need to locate a specific task, enter a relevant term in the **Search box**. Use **Apply filter** to apply the current filter and refresh the list to the matching records.

3. When you need to work with selected records, use **Select** to mark the required tasks. Use **Delete** only when you intend to remove the selected task records, and confirm the prompt with **Yes**. Select **No** to keep the records.

   > **Warning:** Confirm the selected records before choosing **Delete**. Use **No** if the selection is not correct.

4. When the current column arrangement is not suitable for your work, select **Columns Chooser** and adjust the visible columns. Choose **Standard Layout** to return to the standard list arrangement.

5. When you want to reuse a column arrangement, select **Add Layout**, enter a value in **Layout name**, and select **Save**. To change the layout currently in use, select **Update Current**. To remove a saved layout, select **Delete Current** and confirm with **Yes**.

   > **Note:** Give saved layouts clear names that reflect their intended use, such as "Project Due Dates" or "Sales Follow-Up."

6. When you need task information outside the application, apply the required search or filter first, then select **Export** to export the displayed task information.

Examples

A project manager needs to review tasks due for a sales-related job.

1. Open **Tasks** and enter the job reference or task title in the **Search box**.
2. Select **Apply filter** to limit the list to the relevant task records.

3. Review each matching record's **Owner**, **Due date**, **Status**, and **Importance** to identify work requiring follow-up.
4. Select **Columns Chooser** if the current arrangement does not show the information needed for the review.
5. Select **Add Layout**, enter **Project Task Review** in **Layout name**, and select **Save** to retain the preferred column arrangement.
6. Select **Export** if the filtered task list is required for an external project review.

Tips

> **Tip:** Use a saved layout when you regularly review tasks from the same operational perspective, such as project due dates or sales follow-up.

> **Note:** Use **Standard Layout** when a saved layout no longer provides the information you need.

> **Warning:** Export only after applying the appropriate search or filter so that the exported list reflects the task records you intend to review.

Troubleshooting

Symptom	Likely cause	Fix
The task list contains too many records.	No search or filter has been applied.	Enter a term in the **Search box** and select **Apply filter**.
Important task information is not visible in the list.	The current layout does not include the required columns.	Select **Columns Chooser** to adjust the columns, or select **Standard Layout**.
A saved layout needs changes.	The active layout no longer suits the review.	Modify the layout and select **Update Current**.
A deletion was started by mistake.	The wrong records were selected or the deletion is no longer required.	Select **No** in the confirmation prompt.

Related pages

- Tasks — Overview

- Tasks — Learning Path