Tasks — Overview

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Applications › Tasks

Tasks provides a central area for managing task records and reviewing tasks in a list-based view. Sales representatives, sales managers, project managers, purchasing officers, warehouse managers, and finance users can use this area to keep operational work visible and organized.

The area includes individual task records as well as Tasks list views. List layouts and displayed columns can be adjusted to support different working needs, and task information can be filtered or exported for review.

What you can do here

- Use **Standard Layout** to return the task list to the standard layout.
- Use **Add Layout** to create an additional layout for the task list.
- Use **Columns Chooser** to select the columns displayed in the task list.
- Use **Apply filter** to apply the selected filter criteria to the task list.
- Use **Export** to export task list information.
- Use **Save** or **Update Current** to save task or layout changes.
- Use **Delete Current** or **Delete** to remove the current item, and use **Yes** or **No** to respond to confirmation prompts.

Related pages

- Tasks
- Tasks — Learning Path