

# CRM

- [Adding Notes and Tasks](#)
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# Adding Notes and Tasks

Notes may be added to Tasks, Customers, Sales Orders, Purchase Orders and Stock Transfers; the process is the same for each one.

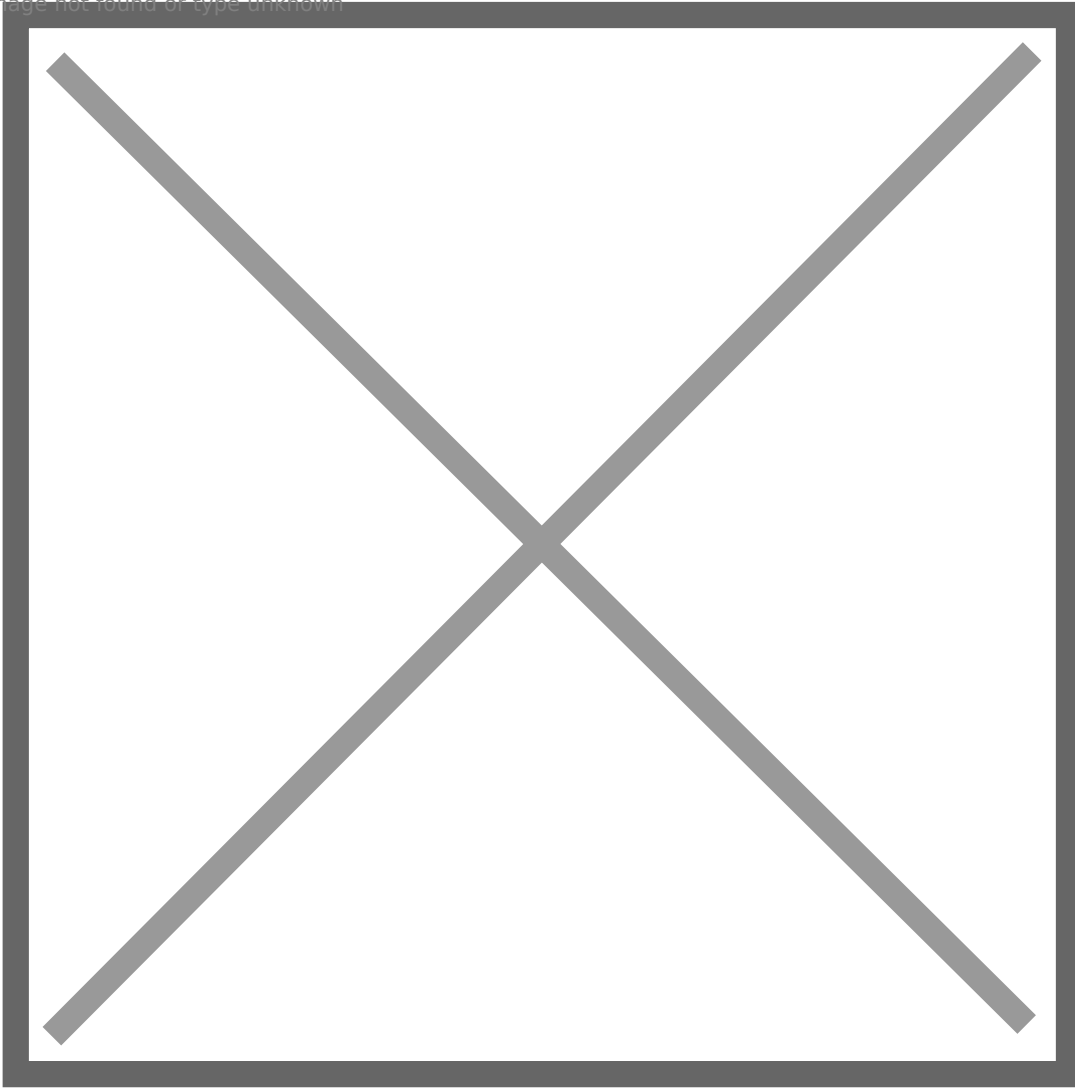
Task categories are controlled within [Site Settings](#)

On Sales Orders, it is possible to email the note directly to the Customer; this email will include any attachments you upload to the Note

## How to add a Note or a Task

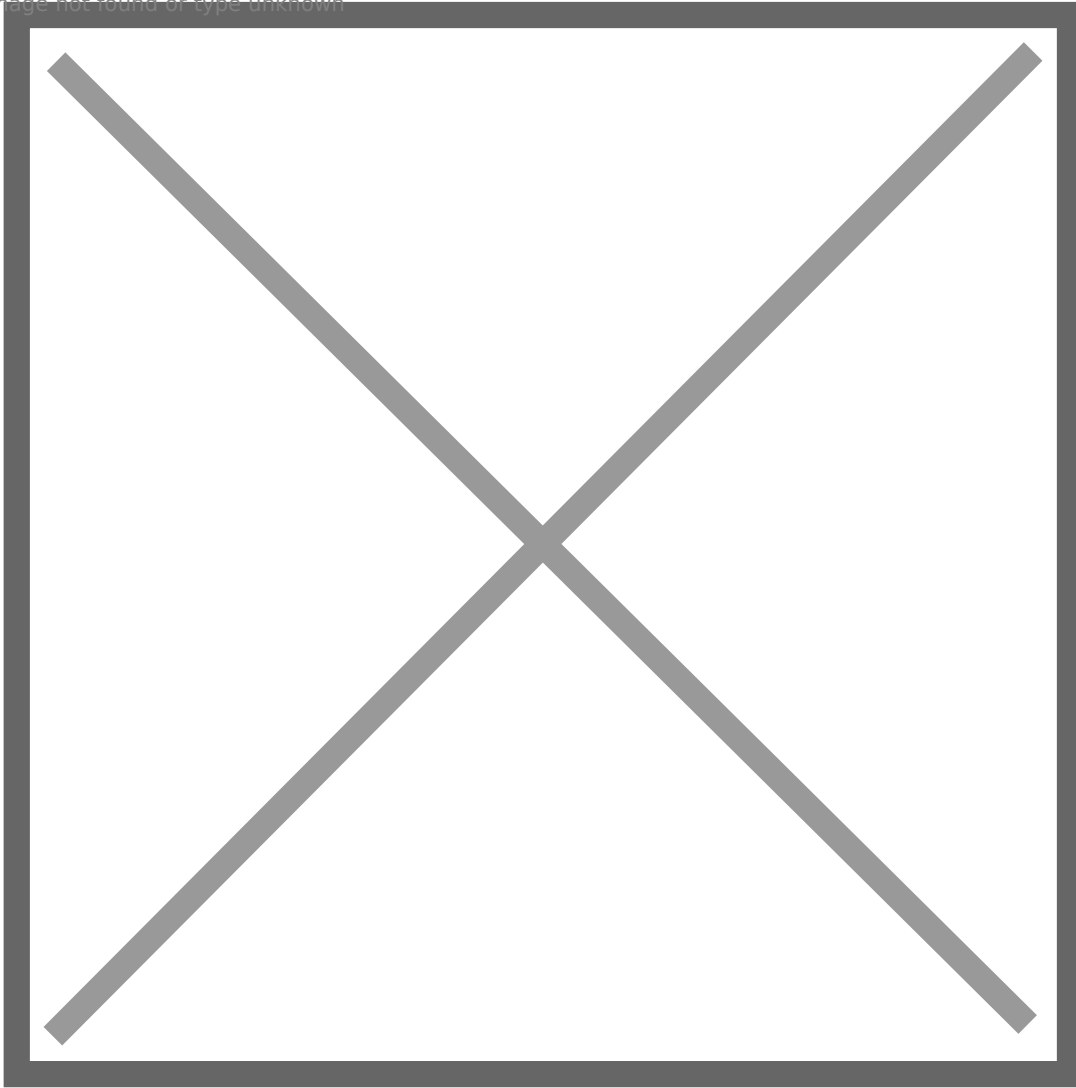
1. Click into this box to type a note

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2. Click add attachments to the note

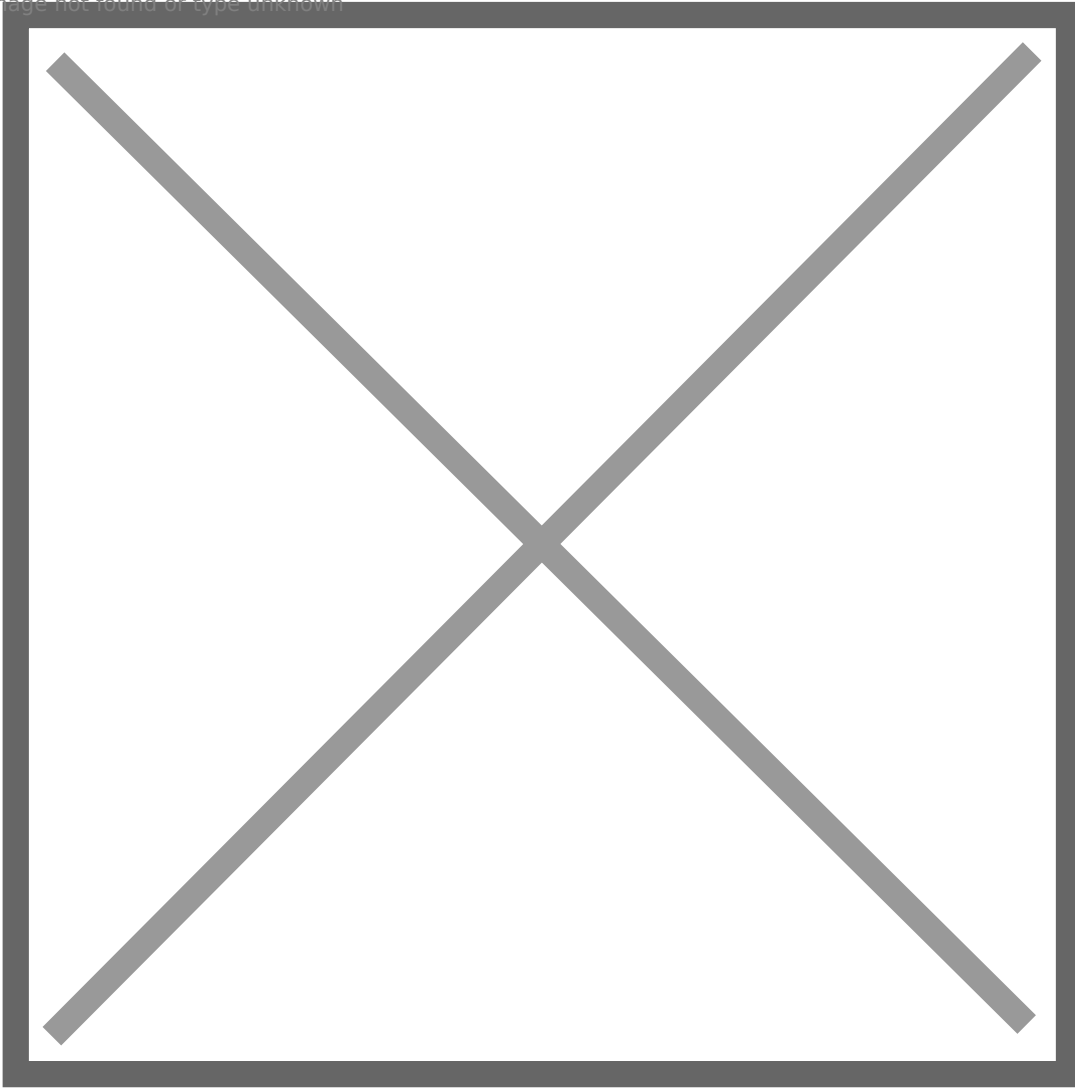
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Tip: There is a file size limit, but it is possible to add multiple files simultaneously; use this to add PDFs, images and short videos

3. Choose your files from the dialogue, or alternatively drag and drop them onto the 'choose files' button

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Tip: You have the option to save this as a note or to turn it into a Task

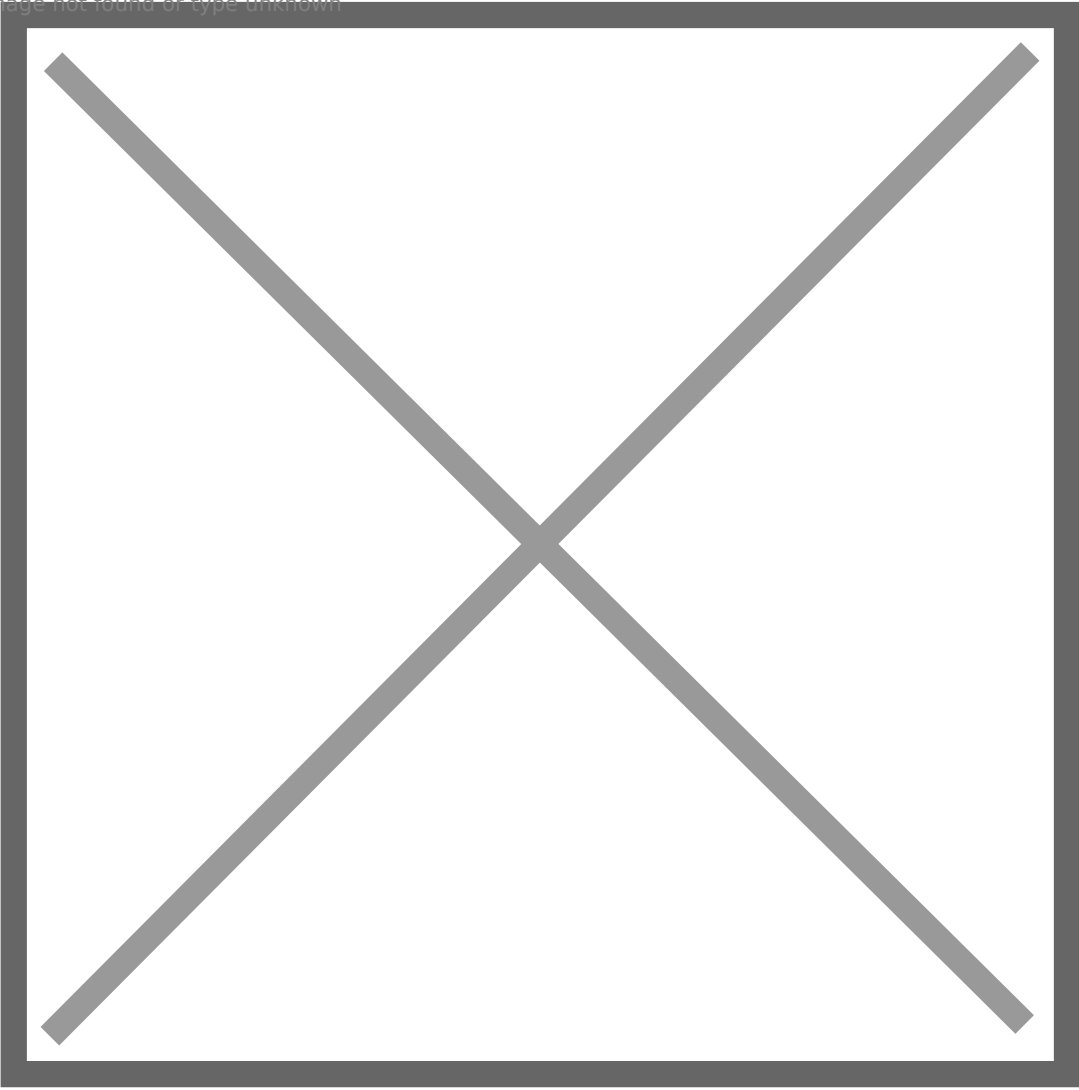
4. To turn this into a task, click the appropriate button

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5. Make your selections, and then click to 'create task'; this will save the note and add a Task

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# Edit a Task

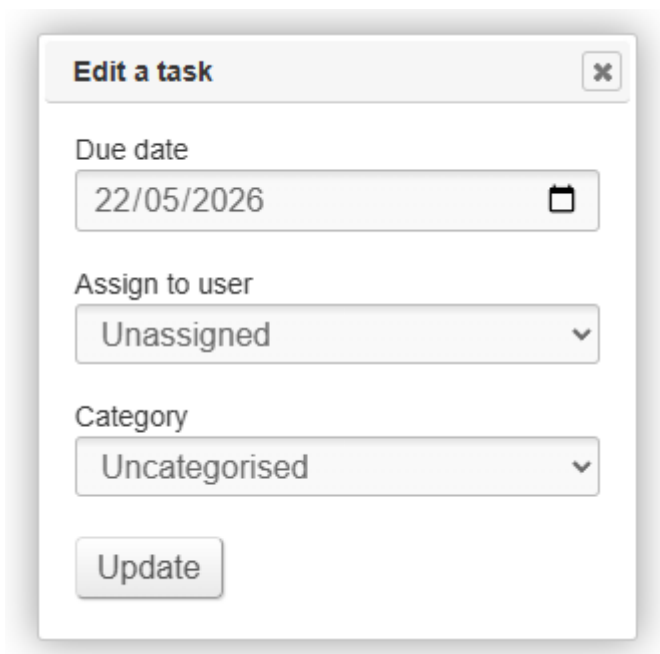
Use this control to edit a Task.



This control may be used in order to change:

- the User responsible for the Task
- the date the Task is due
- the category of the Task

Simply use the dialogue to make the amends and click save.

A screenshot of a dialog box titled 'Edit a task' with a close button (X) in the top right corner. The dialog contains three input fields: 'Due date' with the value '22/05/2026' and a calendar icon; 'Assign to user' with a dropdown menu showing 'Unassigned'; and 'Category' with a dropdown menu showing 'Uncategorised'. At the bottom of the dialog is an 'Update' button.