

# Managing Tasks

- [Summary](#)
- [Status](#)
- [Task Summary](#)
- [Detail](#)
- [Notes](#)
- [Audit History](#)

# Summary

The Task page displays all of the relevant information about any specific Task, and allows the User to update and manage the Task as appropriate.

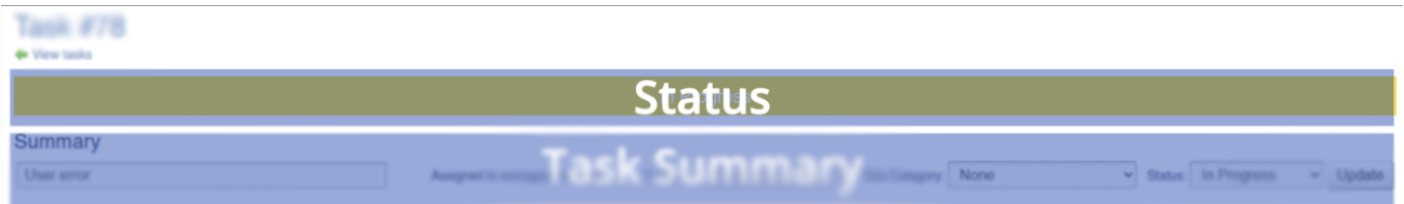
## Page Breakdown

- [Status](#)
- [Summary](#)
- [Detail](#)
- [Notes](#)
- [Audit History](#)

The screenshot displays the 'Task #78' interface. At the top, there is a 'View tasks' link. The main content is divided into several sections: 'Status' (with a 'Task Summary' header and 'Assigned to iconography', 'Sub Category: None', 'Status: In Progress', and an 'Update' button), 'Order Detail' (with 'Order: Z4484', 'Date: 14/04/2023 16:30', 'Customer: Mr Test Test', 'Email: josh.feld@iconography.co.uk', and 'Phone'), 'Notes' (containing a message from 'iconography' at 11:42 and a customer note about a special discount), and 'Task Audit History' (listing actions like 'Updated summary by iconography' and 'Updated status to in progress by iconography'). The interface includes various interactive elements like dropdown menus, buttons, and a 'Completed by' field.

# Status

This section shows the status of the Task; this is actually managed within the [Task Summary](#).



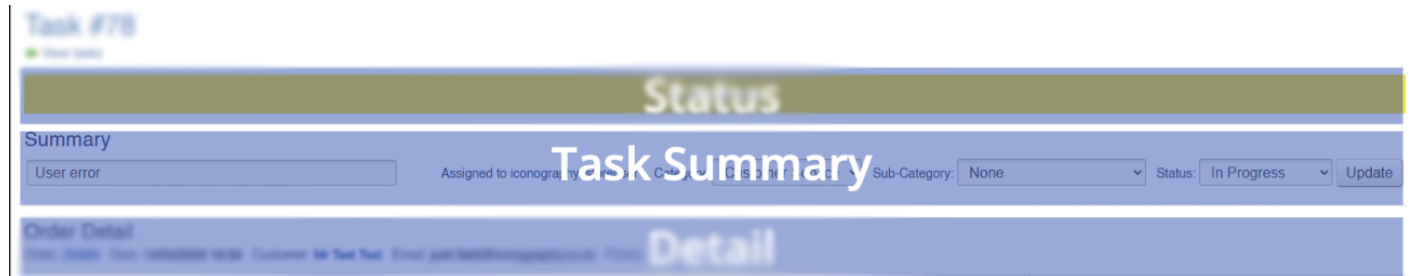
The statuses include:

- open
- in progress
- awaiting reply
- awaiting action
- completed

These statuses are set manually; they are not linked to any additional function

# Task Summary

This section shows essential information about the Task.



The screenshot shows a task summary form with the following elements:

- Task #78** (with a green dot icon)
- Status** (highlighted in a dark green bar)
- Summary** section containing:
  - A text input field with the value "User error".
  - Text: "Assigned to iconography" followed by a dropdown menu.
  - Text: "Created by" followed by a dropdown menu.
  - Text: "Sub-Category:" followed by a dropdown menu with the value "None".
  - Text: "Status:" followed by a dropdown menu with the value "In Progress".
  - An "Update" button.
- Order Detail** (highlighted in a blue bar)

## Summary

Use this to enter a summary of the task - this is output as part of the list of Tasks on the previous page, and is intended to be used as a small snapshot of the action.

This is an optional field.

## Assignment

This will show a list of all Users linked to this Task.

Note: a single Task can have multiple Notes added to it, and each of those may have different Users assigned to them

## Category

Use these controls to set the Category and Sub-Category to the Task.

These must be manually assigned, and no automation is linked to them

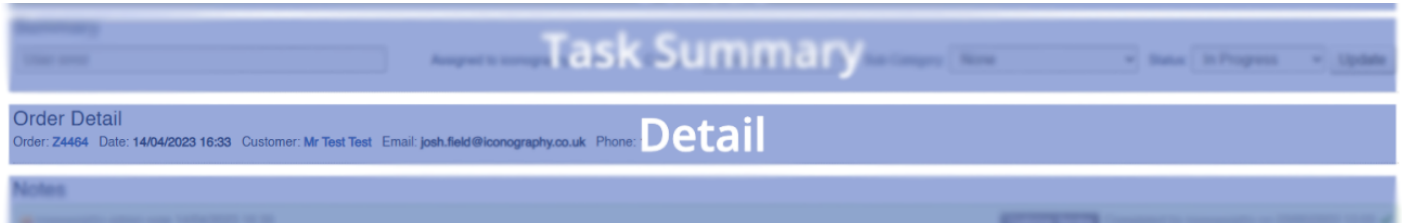
## Status

Use this to control the [Status](#) of the Task.

These must be manually assigned, and no automation is linked to them

# Detail

This section will show the Detail of any linked item, e.g. a Sales Order.



## Detail

This will vary depending on the lined item.

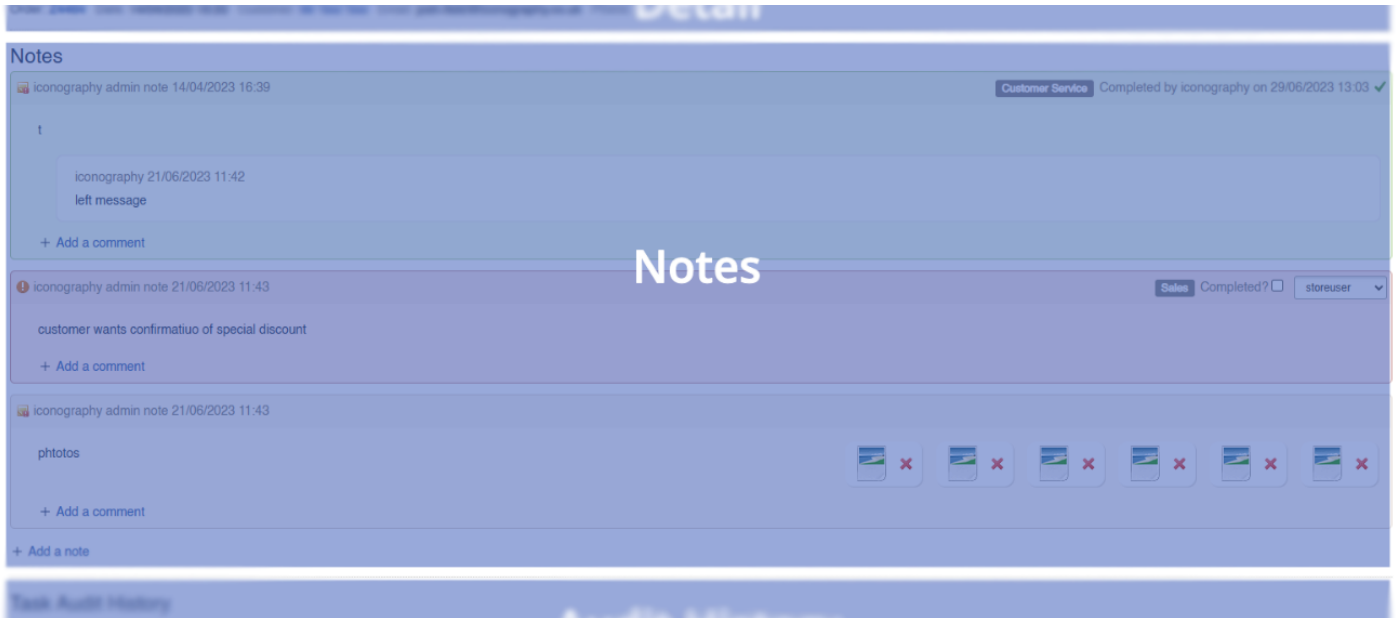
For example, a Task linked to a Sales Order will include information on the Sales Order No. and Date, the Customer, etc.

These are the different kinds of links:

- Customer
- Customer Return (RMA)
- Purchase Order
- Sales Order
- Stock Transfer
- Supplier Return

# Notes

This section is used to manage the Notes that are within a Task.



From this section it is possible to view and comment on individual Notes, as well as reassign them to a new User.

It is also possible to mark a Note as completed within this section.

## Multiple Notes/Users

All Tasks must have at least one Note. It is also possible to insert additional Notes to a Task within this section.

As each Note may be assigned to a different User, it is possible to have multiple Users linked to a single Task.

# Audit History

In this section, a complete Audit History for the Task is displayed.



The screenshot shows a blue header bar with the text "Task Audit History" on the left and "Audit History" in a larger font on the right. Below the header, there is a list of four audit entries, each starting with a bullet point and followed by a description of the action and a timestamp.

- Updated summary by iconography at 11/07/2025 09:57:42
- Updated status to in progress by iconography at 11/07/2025 09:55:27
- Updated sub-category to Replacement Needed by iconography at 11/07/2025 09:54:42
- Added new task by iconography at 14/04/2023 16:39:28

This is automatically generated based on actions taken by Users in the CMS.