Managing Tasks

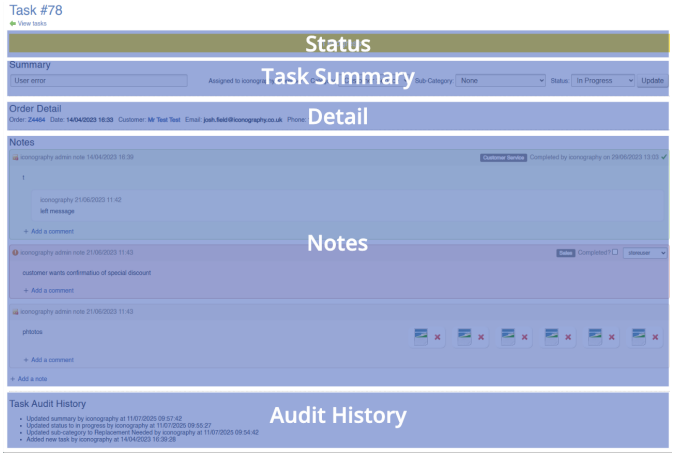
- Summary
- Status
- Task Summary
- Detail
- Notes
- Audit History

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.

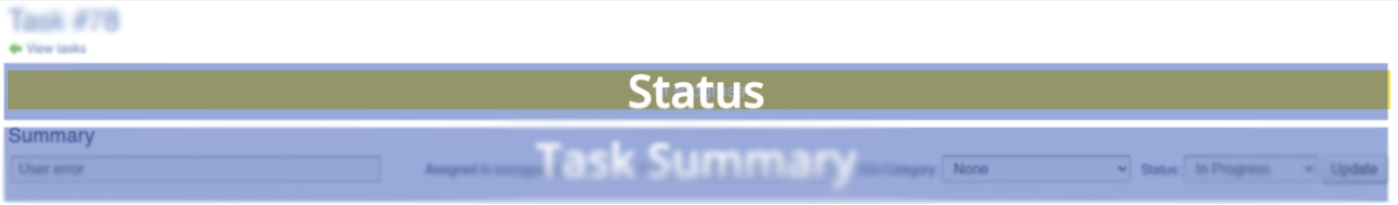
Page Breakdown

- Status
- Summary
- Detail
- Notes
- Audit History



Status

This section shows the status of the Task; this is actually managed within the Task Summary.



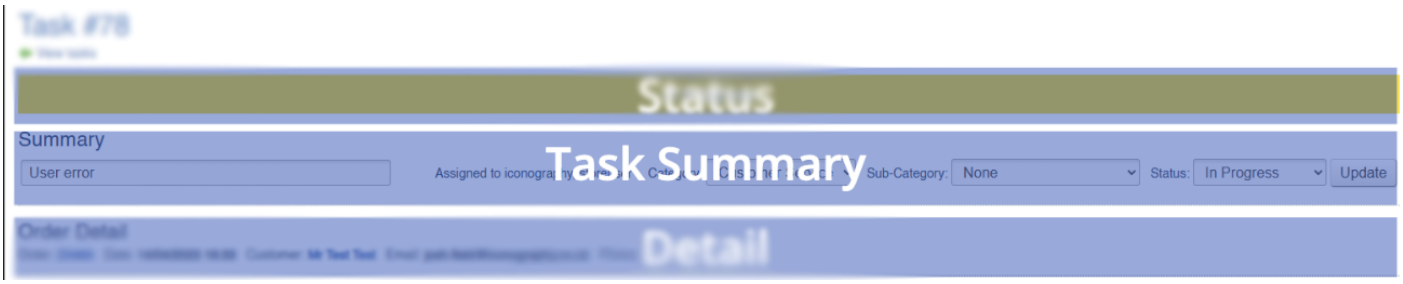
The statuses include:

- 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.



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

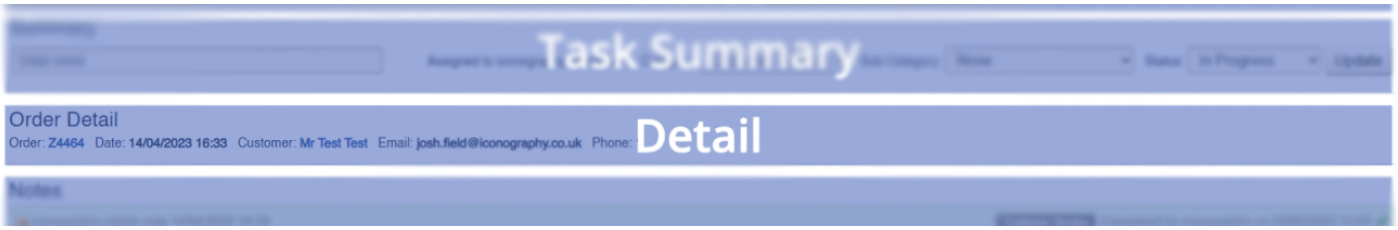
Use this to control the Status of the Task.

>

> 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.

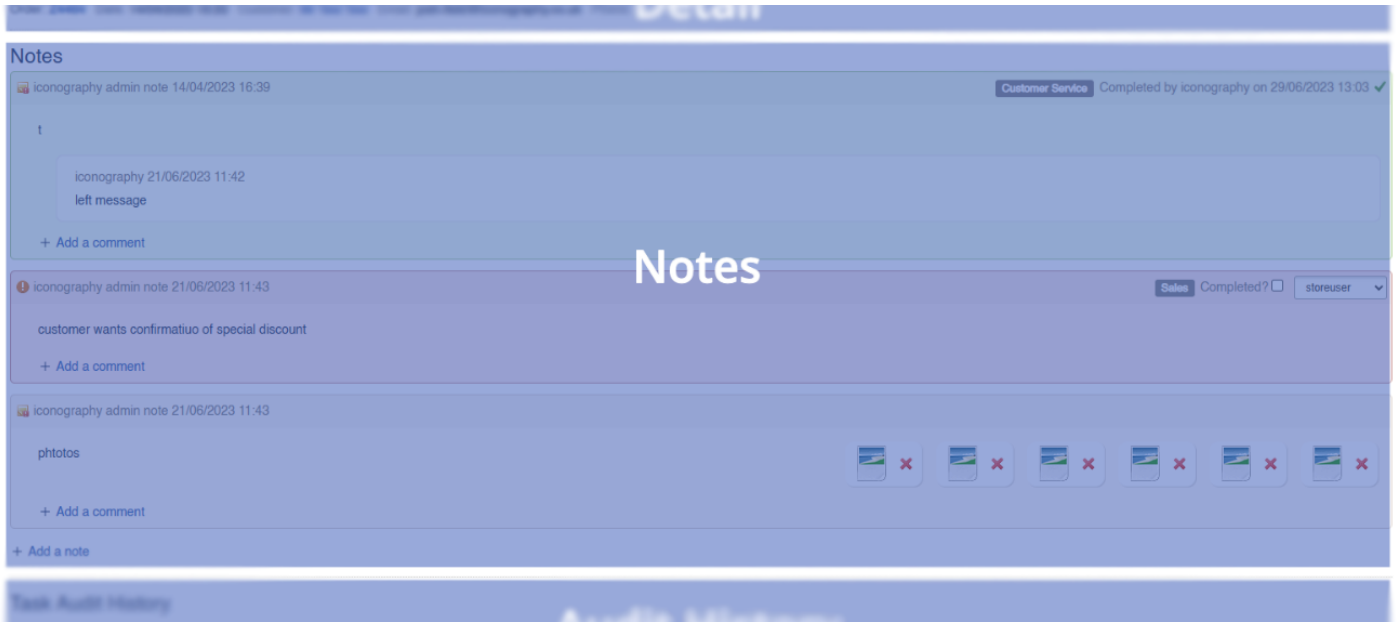
For example, a Task linked to a Sales Order will include information on the Sales Order No. and Date, the Customer, etc.

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 is 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 addition 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.



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