

# Tasks

A fully functioning CRM.

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# Summary


Use this screen to add, view and manage Tasks.

It contains a summary of all Tasks, and may be used to review your own Tasks, as well as those assigned to other Users.

Tasks may be added throughout the system, against Sales Orders, Purchase Orders, Stock Transfers and more; for a guide on adding Notes and Tasks, click [here](#)

Notes are simply Tasks without an actionable task

## Key to Icons

 = open

 = in progress

 = awaiting reply

 = awaiting action

 = completed

Overdue Tasks are highlighted in red

For more information on Statuses click [here](#).

## Finding a Task

All Tasks are listed on this summary screen; use the filters to find or view Tasks. You can filter by:

- Store
- Store User
- Category
- Status
- Due Date

You can also choose to view overdue only.

## Tasks

Store: ALL Store user: ALL Category: ALL Status: ACTIVE From: dd/mm/yyyy To: dd/mm/yyyy  Show overdue only Search Reset

Displaying 58 task(s)

+ add new task

id	status	summary	assigned	linked	category	sub-category	notes	completed	request date	next due date
#89	Open		test	Z4717 Mr Michael Whitman	Finance	-	1	0 of 1	11/07/2025 10:43	24/07/2025
#88	Awaiting Reply		mike, storeuser, test	Z4755 Mrs Maddison Ellis	Customer Service	Awaiting Report	3	1 of 3	11/07/2025 09:56	15/07/2025
#87	Open		mike, storeuser	Z4640 Mr Icon Ography	Purchasing	-	2	1 of 2	03/10/2023 14:42	-
#86	Open		autotest, iconography	Z4635 Mr Michael Whitman	Purchasing	-	3	0 of 3	02/10/2023 14:52	09/10/2023

## View by Category

Use the filters to view Tasks linked to a specific Category; these are set up in [Site Settings](#).

Store user: ALL Category: Customer Service Status: ACTIVE From: dd/mm/yyyy To: dd/mm/yyyy  Show overdue

summary	assigned	linked	category	sub-category	notes	complete
	mike, storeuser, test	Z4755 Mrs Maddison Ellis	Customer Service	Awaiting Report	3	1 of 3
User error	iconography, storeuser	Z4635 Mr Michael Whitman	Customer Service	Replacement Needed	3	0 of 3
Item lost		Z4717 Mr Michael Whitman	Customer Service	Awaiting Report	2	1 of 2
Warranty problem		Mr Michael Whitman	Customer Service	New Issue	1	0 of 1
Delivery error			Customer Service	Refund Needed	0	-

It is not possible to filter by sub-category

## View by User

Use the filters to view tasks assigned to a specific User.

## Tasks

Store: All	Store user: mike	Category: All	Status: All	
Displaying 2 tasks				
<a href="#">add new task</a>				
ID	Status	summary	assigned	linked
400	Assigned	Test	mike, storeuser, test	Z4755 Mike's Test Task
401	Open	Test	mike, storeuser	Z4640 Mike's Test Task

Some tasks may be linked to more than one User

## Managing a Task

Click on the Task Id to manage that Task.

More information on managing tasks is available [here](#).

# Managing Tasks

# 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: 1. 'Status' section with a 'Task Summary' header and a 'Status' dropdown menu set to 'In Progress'. 2. 'Order Detail' section showing 'Order: ZA404', 'Date: 14/04/2023 16:38', 'Customer: Mr Test Test', 'Email: john.fidd@iconography.co.uk', and 'Phone'. 3. 'Notes' section with a 'Customer Status' dropdown set to 'Completed' and a list of notes. The first note is 'iconography admin note 14/04/2023 16:38' with a 'left message' and an 'Add a comment' button. The second note is 'iconography admin note 21/06/2023 11:43' with the text 'customer wants confirmation of special discount' and an 'Add a comment' button. The third note is 'iconography admin note 21/06/2023 11:43' with the text 'photos' and several image thumbnails. 4. 'Task Audit History' section with a 'Task Audit History' header and a list of audit events: 'Updated summary by iconography at 11/07/2023 09:57:42', 'Updated status to in progress by iconography at 11/07/2023 09:58:27', 'Updated sub category to Requirement needed by iconography at 11/07/2023 09:54:42', and 'Added new task by iconography at 14/04/2023 16:38:28'.

# 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 status indicator)
- Status** (highlighted in a dark green bar)
- Summary** section containing:
  - A text input field with the value "User error".
  - A label "Assigned to iconography" followed by a dropdown menu.
  - A label "Sub-Category:" followed by a dropdown menu with the value "None".
  - A label "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

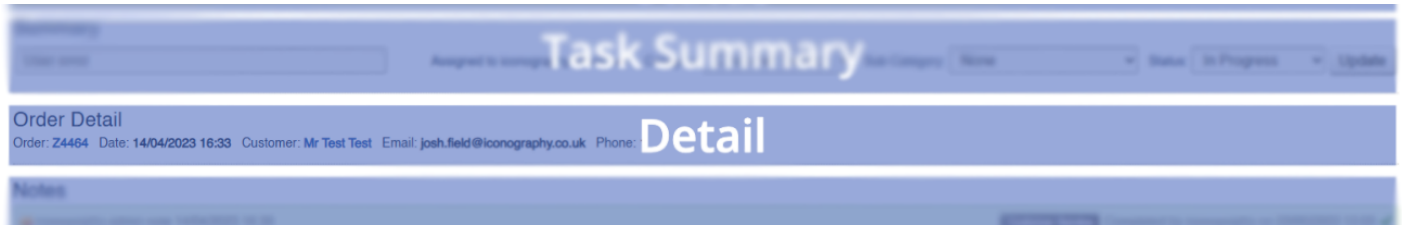
## Status

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.

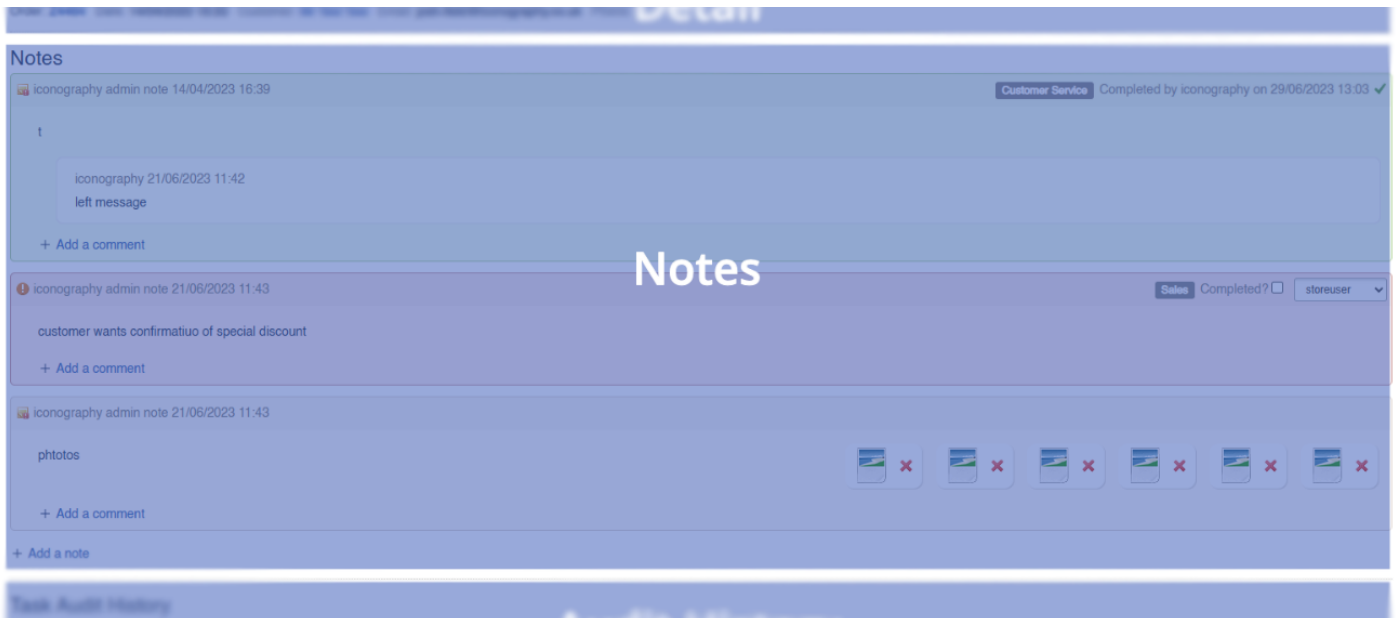
For example, a Task linked to a Sales Order will include information on the Sales Order No. and Date, the Customer, etc.

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:

- 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.