

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				
add new task				
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](#).

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