

# Tasks

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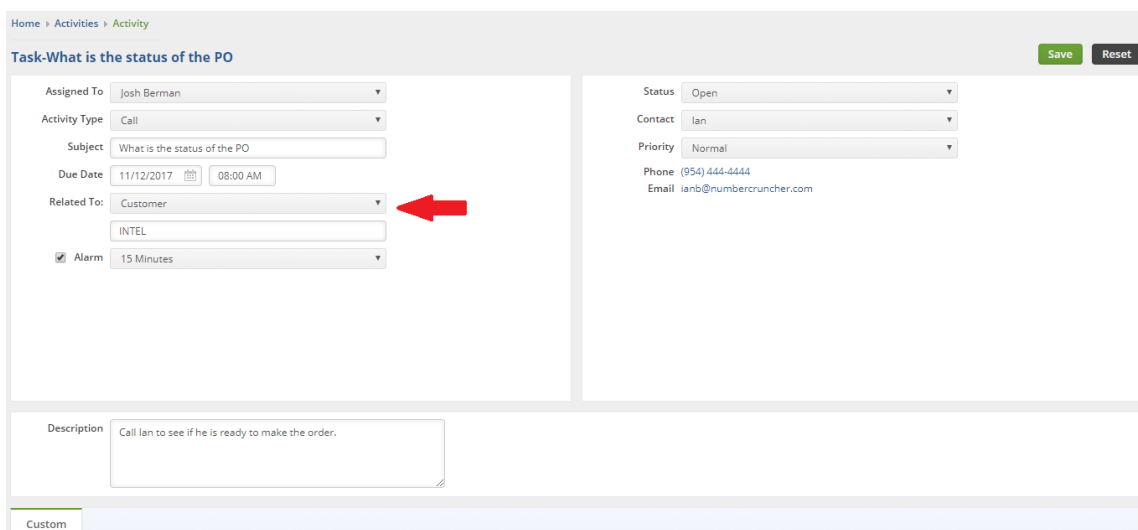
## Overview

A task is an **activity** that requires action on the part of the assignee. You can create different **types** of tasks for example, *call* and *send samples*. A task has two states: *Open* and *Closed*. You set the state of an activity using **statuses**. Each status has a property named *Closed*. When you change the status of an activity to a status in which *Closed* is **true** (checked), then that activity will be closed and the closed date will be recorded.

## Add/Edit Task

You can add or edit a task from the home page or from within a related record. For example, the following shows the same task being edited from the home page and a customer details page. You will notice they are virtually identical except when editing from the home page you will see the *Related To* property whereas from the customer details page the *Related To* property is hidden because it is automatically set.

### Edited from the Home Page



The screenshot shows a web form for editing a task. The breadcrumb trail is 'Home > Activities > Activity'. The task title is 'Task-What is the status of the PO'. There are 'Save' and 'Reset' buttons in the top right. The form is divided into two columns. The left column contains: 'Assigned To' (Josh Berman), 'Activity Type' (Call), 'Subject' (What is the status of the PO), 'Due Date' (11/12/2017 08:00 AM), 'Related To' (Customer) with a red arrow pointing to the dropdown, and an 'Alarm' checkbox checked with a 15-minute interval. The right column contains: 'Status' (Open), 'Contact' (Ian), 'Priority' (Normal), 'Phone' (954) 444-4444, and 'Email' ianb@numbercruncher.com. Below the columns is a 'Description' field with the text 'Call Ian to see if he is ready to make the order.' At the bottom left, there is a 'Custom' tab.

### Edited from Customer Detail

Customer - INTERCOMMERCE

General

Company Primary Contact Email Website

Note [Edit](#)

Sales Order

ACTIVITY TYPE

Call

Other

Price Level Terms Type Sales Rep

Items Sold

[Add Event](#) [Add Task](#)

ASSIGNED TO	ACTIONS
Josh Berman	<a href="#">Edit</a> <a href="#">Delete</a>

**Add / Edit Task**

Assigned To: Josh Berman

Activity Type: Call

Subject: What is the status of the PO

Due Date: 11/12/2017 08:00 AM

Alarm: 15 Minutes

Description: Call Ian to see if he is ready to make the order.

Status: Open

Priority: Normal

Contact: Ian

Phone: (954) 444-4444

Email: ianb@numbercruncher.com

Custom

[Save](#) [Cancel](#)

Changing the status to a Closed status will move the Activity from the Open Activities to the **Activity History** Tab.

Sales Order Addresses Ship Docs>Returns Quotes Contacts Attachments Custom Open Activities **Activity History** Items Sold

[Send Email](#) [Add Log](#)

ACTIVITY TYPE	SUBJECT	CLOSED DATE	DESCRIPTION	ASSIGNED TO	ACTIONS
Call	Create the order	11/12/2017 08:52 AM		Ian Benoliel	<a href="#">Edit</a> <a href="#">Delete</a>
Call	What is the status of the PO	11/12/2017 09:06 AM	Call Ian to see if he is ready to make the order.	Josh Berman	<a href="#">Edit</a> <a href="#">Delete</a>



Contacts will be shown only if related to sales transactions, customers and leads. Email and phone will **not** show when *Adding* an activity but will show when *Editing* one.