Client Tasks Screen

Updated on February 2017

Home > Client Management (Search Client) > Tasks

Business Purpose:

The **Client Management - Tasks** page displays a tabular listing of tasks relating to the particular Client.

How to:

1. For each Task record, the **Task ID**, **Status, Creator, Date, Assigned To** and **Program** are displayed.

2. Click the **Task ID** to select a particular Task to view or edit the task details.

3. If you want to change the default records per page from 20, then select another number from the Record per page dropdown.

4. Click New to create and assign a new task.

Important Notes:

1. The total number of records is shown at the top and the bottom of the listing (table) on every page.
2. A symbol denotes a high priority task.

3. A symbol denotes a low priority task.

4. Medium priority tasks have no symbols.