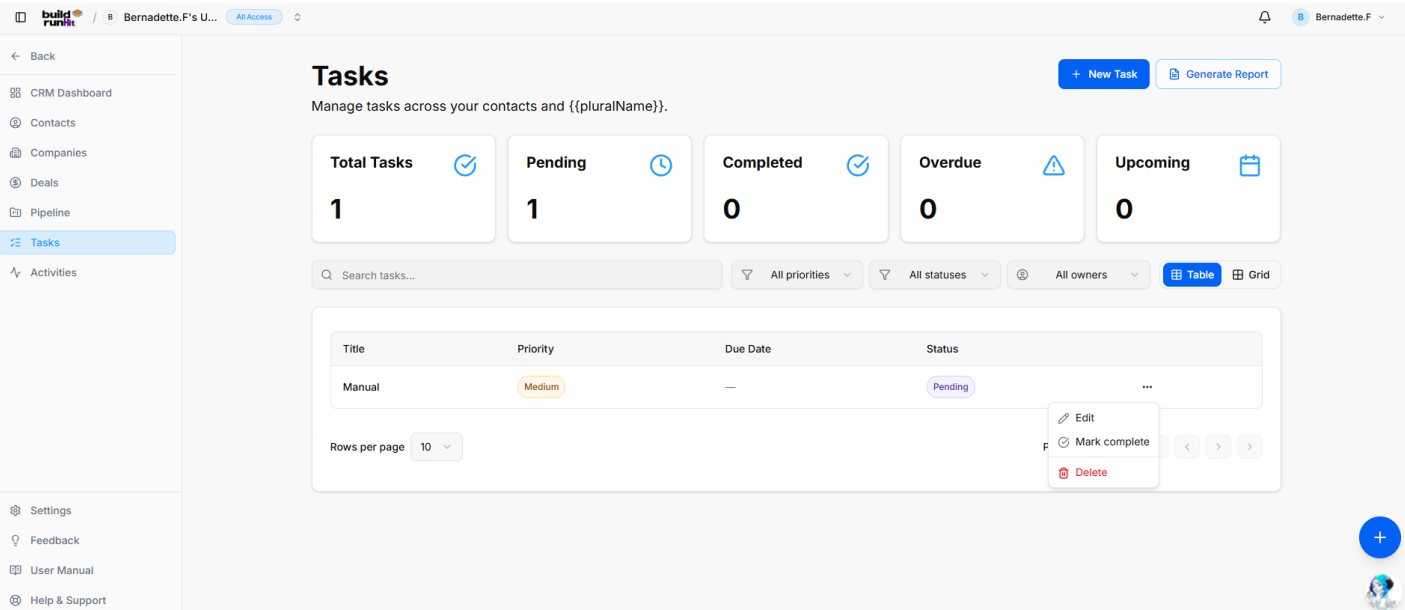


BuildRunKit CRM: Tasks Sub-Section

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The **Tasks** sub-section helps you organize action items, set follow-up deadlines, and track execution across all CRM contact records and sales opportunities.

Header & Action Buttons

- **+ New Task:** Direct action button to open the task creation modal.
- **Generate Report:** Opens the **CRM Tasks Report** export window:
 - **Export Count:** Indicates total targeted task entries (e.g., *Exporting 1 records*).
 - **Export Format Options:** Download task lists via **Export as PDF** or **Export as CSV**

CRM Tasks Report

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Generate a report for the CRM Tasks data.

Exporting 1 records

Export format

Export as PDF

Export as CSV

Task Summary Metrics Top KPI cards highlight workload and deadline urgency:

- **Total Tasks:** Displays the cumulative count of all logged task records.
- **Pending:** Tracks open action items awaiting action.
- **Completed:** Counts resolved tasks marked as done.
- **Overdue:** Highlights past-due action items requiring immediate attention.
- **Upcoming:** Displays scheduled future tasks with approaching target dates.

Directory Controls & Search Bar

- **Search tasks...:** Text input field to locate task items by title or keyword.
- **All priorities Dropdown:** Filter tasks by urgency level (e.g., High, Medium, Low).
- **All statuses Dropdown:** Filter by execution state (e.g., Pending, In Progress, Completed).
- **All owners Dropdown:** Filter tasks by assigned team member.
- **View Switches:** Toggle display format between **Table** (list view) and **Grid** (card view).
- **Rows per page & Pagination:** Adjust visible items per page and step through task lists.

Tasks Table Data Columns

- **Title:** Name and summary of the action item.
- **Priority:** Visual urgency badge (e.g., *Medium*).
- **Due Date:** Targeted completion deadline.
- **Status:** Current progress indicator (e.g., *Pending*).
- **Row Actions Menu (...):** Quick management options for individual rows:

- **Edit:** Opens the setup editor to adjust task details, deadlines, or priority.
- **Mark complete:** Instantly toggles status to completed.
- **Delete:** Removes the task entry from your workspace.

BuildRunKit CRM: Creating a New Task

New Task

Title *

Due Date

Pick a date

Status

Todo

Priority

Medium

Contact

Select a contact

Deal

Select a contact first

Owner

Bernadette.F

Description

Cancel

Save

Clicking the + **New Task** button opens a setup modal to log and assign individual action items:

- **Title ***: Required text field to enter the task name or core action.
- **Due Date**: Date picker input to assign a completion deadline.
- **Status**: Dropdown selector to set current progress state (*Todo, In Progress, Complete, or Cancelled*).

- **Priority:** Dropdown selector to set urgency (*Low, Medium, High*).
 - **Contact:** Dropdown menu to link the task to a specific client record.
 - **Deal:** Dropdown menu to associate the task with a specific sales opportunity (requires selecting a contact first).
 - **Owner:** Dropdown selector to assign task responsibility to a team member in your workspace.
 - **Description:** Multi-line text field for additional context, steps, or execution notes.
 - **Modal Actions:** Click **Cancel** to discard or **Save** to create the task record.
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Revision #2

Created 2026-05-14 13:09:38 UTC by Bernadette F

Updated 2026-09-09 10:23:05 UTC by Bernadette F