

Projects and tasks

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Create projects, break them into tasks, assign people and track progress.

Beginner · About 25 minutes · Version 1.0 · Updated 17 November 2026

Plan availability

Included in the **Enterprise** plan. Contact us if you want to upgrade.

Overview

A **Project** groups the work for one job, for a customer or for your own company. It is divided into **Tasks** that you assign, schedule and track.

Tasks in a project

Prerequisites

A **Customer** if the project is for a client. Users or employees to assign work to. The Projects Manager role to set things up.

Steps

Create a project

1. Search for **Project** and click **Add Project**.
2. Enter the **Project Name**, choose the **Customer** and the **Status** (*Open*).
3. Set the **Expected Start Date** and **Expected End Date**.
4. Choose the **% Complete Method**, which sets how progress is calculated: by tasks, by task progress or by task weight.
5. Under **Costing and Billing**, enter the **Estimated Cost** and **Total Sales Amount** if you know them.
6. Save.

Add tasks

1. From the project, click **Tasks** (or search for **Task** and click **Add Task**).
2. Enter the **Subject**, the **Project**, the **Expected Start and End dates**, the **Priority** and the **Expected Time** in hours.
3. Assign it with **Assigned To**. The person is notified.

4. For tasks that depend on others, add them in **Depends On**.
5. Save. Update the **Status** as work proceeds: *Open*, *Working*, *Pending Review*, *Completed*.

Views

In the **Task** list, use **Gantt** for a timeline, **Kanban** for columns and **Calendar** for dates. See Kanban boards, recurring documents and bulk tools.

Practical example

Mwangaza Interiors wins a contract to fit out an office. The project has tasks such as *Measure*, *Order materials*, *Install* and *Handover*, each assigned and dated. The manager checks the Gantt each Monday.

Important notes

- Use **Project Templates** to reuse the same set of tasks for repeat jobs.
- Close a project by setting the status to *Completed* only after billing is done.

Common mistakes

- Tasks with no assignee or dates.
- Never updating status, so the percent complete is meaningless.

Next steps

Read Timesheets.

Related documentation

- Timesheets
- Billing clients and tracking project costs
- Kanban boards, recurring documents and bulk tools