How to Close a Task

Once a task is completed and has a "Resolution" entered you can remove it from the task list by doing 1 of the following 2 steps listed.

A. Post the Task to Notes - If you would like to simply close the task and place it into History you would click the "Post to Notes" button along the top of the task. You can then revisit the task at any time by going clicking the drop down for "Tasks and Work Orders" and then selecting "Closed Task List".

B. Invoice the Task - If you would like to Close the task AND Invoice the task you will need to input a "Resolution" and then hit the button that says, "Invoice" along the top of the task. Then click YES on the popup that says, "Would you like to create a Invoice?". The system will create an invoice and close the task. You can access the closed task at any time by clicking the drop down for "Tasks and Work Orders" and then selecting "Closed Task List".