

# TaskFlow Pro: End-User Documentation

# 21 January 2025

**RECORD OF CHANGES**

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# 1.0 Introduction

Welcome to the TaskFlow Pro User Guide. This document provides comprehensive instructions for using TaskFlow Pro, a project management tool designed to streamline workflows, enhance collaboration, and improve task visibility across teams. Whether you’re a new or experienced user, this guide will help you understand how to effectively utilize TaskFlow Pro’s features.

# 2.0 What is Taskflow Pro?

Taskflow Pro Ultimate Field Service Solution is the first step in putting your business on autopilot. We’re a Field Services ERP system architected and designed using the best technologies for web and mobile with no additional hardware requirements.

When researching and planning Taskflow Pro, companies told us they were ultimately looking for greater real-time insight into their overall operations…. basically answers, and plenty of them!

Taskflow Pro is a robust platform priced for small-to-enterprise sized companies’ delivering a user friendly and affordable solution providing the exact status of all areas of your business and its needs.

# 3.0 Getting Started

# 3.1 System Requirements

To use TaskFlow Pro, ensure your system meets the following requirements:

• Operating System: Windows 10+, macOS 11+, or Linux (Ubuntu 20.04 or newer).

• Web Browser: Chrome (v90+), Firefox (v88+), Edge (v91+), Safari (v14+).

• Internet Connection: Minimum 10 Mbps.

• RAM: At least 4 GB.

• Storage: 500 MB of available disk space.

## 3.2 **Installation and Access**

**Web Version**

1. Open your web browser.

2. Navigate to [Download Taskflow Pro Ultimate - Taskflow Pro](https://www.taskflowpro.com/download/)

3. Click Sign Up or Log In to access your account.

**Desktop Application**

1. Download the application installer from [Downloads](http://secure-web.cisco.com/1WugR-ixftEN2v37pL2ehuXr2jq9UynYe0RKkCu90UPhBI16nI6pX5wOV2BUrXt2k4Cdh_qGnhNHXiQ_xuf3z4TJaN685VurlCY5nvd8hjuYyHJqHMAWGe7mz9zqwvFc4mvjs4Z9WMoHSEPL2vQZOfKYO1m6yzKESIGlMxjRi920VysYAGVlx-tSycD3ZLlqtYtX_0KEQyEFxk5FKH1qG2SZRZM100Ms-bAsvQlC-y2iJq_ms-taBtUY9pc8QfZPa-INFfUHpqQxoJx7Xa546OuaXTO0vkTEwTInN0mEy8S6Pllxu-pd1ah9NFC1F3cXi8yqdwH5P0w_6anGGl65p-WA_Qc565-AsFzNyFhICG5Gt0FUXkD-_L2VZqFhdB6gxXGevTufyECy1VDRTQ06rfdxuBSsk6mxVLKq16uZOxUM/http%3A%2F%2Fwww.taskflowpro.com%2Fdownloads).

2. Run the installer and follow on-screen instructions.

3. Launch the application and log in using your credentials.

**Mobile App**

1. Visit the App Store (iOS) or Google Play (Android).

2. Search for TaskFlow Pro.

3. Download and install the app.

4. Open the app and log in to start managing your projects.

## 3.3 User Interface Overview

Upon logging in, you will see:

• Dashboard: Displays an overview of your projects and tasks.

• Navigation Panel: Access sections like Projects, Tasks, Calendar, and Reports.

• Action Toolbar: Create new projects, tasks, or access settings.

• Notifications: View recent updates and alerts.

# 4.0 Core Features

## 4.1 Creating a New Project

1. Navigate to the Projects section.

2. Click the + New Project button.

3. Enter the project name, description, and select a start and end date.

4. Assign team members by clicking Add Members.

5. Click Save to create the project.

## 4.2 Managing Tasks

1. Open a project from the Projects section.

2. Click Add Task to create a new task.

3. Fill in task details, including title, description, due date, and assignee.

4. Use the Priority dropdown to set task urgency.

5. Click Save to add the task.

## 4.3 Team Collaboration

• Use the Comments section within a task to communicate with team members.

• Share files and attachments by clicking the Attach File icon.

• Assign tasks or update statuses in real time for better coordination.

## 4.4 Tracking Progress

• Use the Progress Tracker on the dashboard to monitor task completion.

• View project timelines with the Gantt Chart feature.

• Generate visual summaries with the Reports section.

# 5.0 **Advanced Features**

## 5.1 Custom Workflows

1. Navigate to Settings > Workflows.

2. Create or edit workflows to suit your team’s needs.

3. Define stages, add rules, and automate repetitive processes.

## 5.2 Integrations

TaskFlow Pro integrates with popular tools like:

• Slack: Enable instant notifications.

• Google Drive: Link files to tasks directly from your Drive.

• Jira: Sync issues and track progress across platforms.

## 5.3 Reporting and Analytics

1. Go to the Reports section.

2. Select a report type (e.g., Task Summary, Team Performance, etc.).

3. Customize the report filters and timeframes.

4. Export reports as PDF or CSV for offline analysis.

# 6.0 Troubleshooting and Support

## Common Issues

• Login Problems: Reset your password by clicking Forgot Password on the login screen.

• Slow Performance: Clear your browser cache or update the app to the latest version.

# 7.0 Additional Resources

## Contact Support

• Email: support@taskflowpro.com

• Phone: 1-800-555-1234

• Live Chat: Available on the website from 9 AM to 5 PM (PST).