End User Guide for TaskOrbit Application

Contents

Chapter 1. Overview

What is TaskOrbit

Here you will get information about what is TaskOrbit.

TaskOrbit is a cloud-based project and task management platform designed to help teams organize their work, collaborate seamlessly, and deliver results faster. Whether you’re managing simple to-do lists or complex projects across multiple teams, TaskOrbit offers flexible tools like task boards, calendars, automations, and integrations — all in one easy-to-use interface.

Chapter 2. Task Management

What is task management

Here you will get information about what is task management in TaskOrbit.

Task Management in TaskOrbit is how you create, organize, and track individual work items. It lets you add due dates, assign teammates, set priorities, break work into checklists, and link tasks with dependencies or recurring schedules to keep everything on track.

How to add dependencies and create recurring tasks

Here you will get instructions about how to add dependencies and create recurring tasks in TaskOrbit.

To successfully add dependencies and create recurring tasks:

- You must know how to create and manage tasks in TaskOrbit.
- You must be familiar with task workflows (to set correct dependencies).
- You must have permissions to modify task schedules and recurrence settings.

1. Create multiple tasks that follow a sequence.
2. In a task, go to **Dependencies > Add Dependency**.
3. Select the task that must be completed first.
4. For recurring tasks:
    - Click task options > **Set Recurrence**
    - Choose frequency (e.g., every Monday)

For a blog workflow:

- Task A: “Write Draft"
- Task B: “Review Draft” (Blocked by Task A)
- Task C: “Publish” (Recurring every Friday)

Chapter 3. Project Management

What is project management

Here you will get information about what is project management in TaskOrbit.

Project Management in TaskOrbit is where you structure your team's work into organized projects. You can build boards, lists, or calendars, define workflow stages, invite your team, and reuse templates or milestones to guide projects from start to finish.

How to use templates and milestones

Here you will get instructions about how to use templates and milestones.

To successfully use templates and milestones feature :

- You must be logged into the application and have permission to create new projects
- You must have access to create and save templates.
- Have understanding of project milestones and how they align with the team's workflows.

1. Go to **Templates > New Template.**
2. Add reusable tasks and columns.
3. Define **milestones** to track phases (e.g., Kickoff, Go Live).
4. Save and reuse the template across similar projects.

Template: "New Client Onboarding"

- Milestones: Welcome → Setup → Training → Handoff
- Used every time a new enterprise client is onboarded

Chapter 4. Automations

What is automation

Here you will get information about what is automation in TaskOrbit.

Automations in TaskOrbit help you eliminate repetitive work. They automatically perform actions—like sending reminders or assigning checklists—based on triggers and rules you define, so your team can focus on what matters most.

How to build custom rules

Here you will get instructions about how to build custom rules.

To successfully build custom rules:

- You must be logged into the application.
- You must have access to create custom automation rules.
- Have a clear idea of the processes to define triggers, conditions, and actions properly.

1. Click **Create New Rule** under Automations.
2. Set:
   - **Trigger:** Task moved to “Ready for Review"
   - **Condition:** Tag = #marketing
   - **Action:** Notify @QA and assign checklist
3. Save and activate the rule.

When a blog is moved to “Ready for Review,” QA is auto-notified and a compliance checklist is added.

Chapter 5. Integrations

What are integrations

Here you will get information about what are integrations in TaskOrbit.

Integrations in TaskOrbit let you connect your workspace with other tools like Slack, Google Calendar, GitHub, or Zapier. This keeps your work in sync, reduces manual updates, and ensures everyone stays informed across platforms.

How to use Zappier or GitHub

Here you will get instructions about how to connect Zappier or GitHub.

To successfully connect Google calendar or Slack:

- You must be logged into the application.
- Have Zapier or GitHub account with access to needed workflows or repos.
- Have familiarity with mapping fields and automation steps

1. In Zapier, create a Zap.
    - **Trigger:** Form submission.
    - **Action:** Create a task in TaskOrbit.
2. Map form fields to task properties.
3. Activate and test the workflow.

Every Google Form request creates a new task in the “Client Requests” board, auto-assigned to your onboarding specialist.

Chapter 6. Dashboards and Reports

What are dashboards and reports

Here you will get information about what are dashboards and reports in TaskOrbit.

Dashboards & Reports in TaskOrbit give you a visual overview of team activity, task progress, and project health. You can use built-in dashboards or create custom reports to monitor workloads, spot bottlenecks, and share insights with stakeholders.

How to view team activity

Here you will get instructions about how to view team activity.

To successfully view team activity:

- You must be logged into the application.
- Have access rights to view dashboards and project data.

1. Click **Dashboard > My Dashboard.**
2. Use default widgets(e.g. "Task due today" , " Overdue tasks").
3. Filter by user or project.

During morning standup, you check:

- What's overdue
- Tasks completed by each team

Chapter 7. User Management and Roles

What is user management and roles

Here you will get information about what is user management and roles in TaskOrbit.

User Management & Roles in TaskOrbit is how you control who can see and do what. It lets you invite team members, assign them roles like admin, contributor, or viewer, and tailor permissions to protect sensitive data and streamline collaboration.

How to create custom roles

Here you will get instructions about how to create custom roles.

To successfully create custom roles:

- You must be logged into the application.
- Must have admin-level access to create and manage roles and permissions.

1. Go to **Roles > Create New Role.**
2. Name the role (e.g., Freelancer).
3. Set permissions (e.g., view only, no delete access).
4. Assign role to external users.

Freelancers see only their tasks, can't modify others, and can’t view sensitive documents—perfect for working with contractors securely.

Chapter 8. API and Developer Tools

What are API and developer tools

Here you will get information about what are API and developer tools in TaskOrbit.

The API & Developer Tools in TaskOrbit allow developers to extend the platform. You can use the API to create or update tasks programmatically, set up webhooks to get real-time updates, or build custom apps that integrate TaskOrbit into your broader workflows.

How to use the API to create the task

Here you will get instructions about how to use the API to create task.

To successfully use the API to create task:

- You must be logged into the application.
- Developer access to generate and manage API keys.

1. Go to **Settings > Developer > API Keys.**
2. Copy your API key.
3. Use POST /tasks in tools like Postman to create a task.

Your CRM triggers a new task when a deal closes:

- Title: “Send onboarding materials to client"
- Assigned to: @CustomerSuccess