

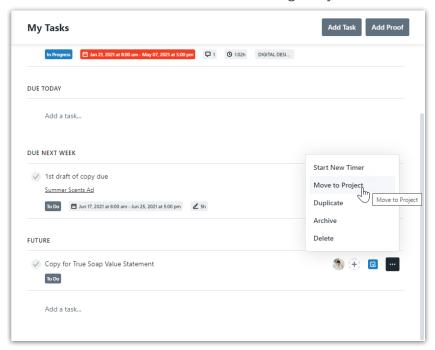
Moving a Task to a Project

Published on 06/21/2021

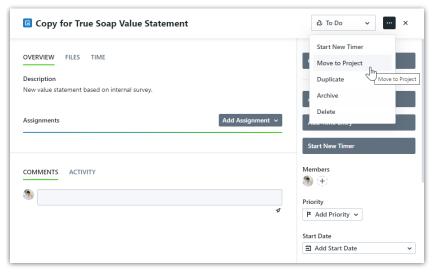
Moving a Task to a Project

If you have a task that you would like to associate with a project or move to a different project, you can do so from the actions menu in list views or the task details modal.

In list views, select the actions menu to the right of your task and choose **Move to Project.**

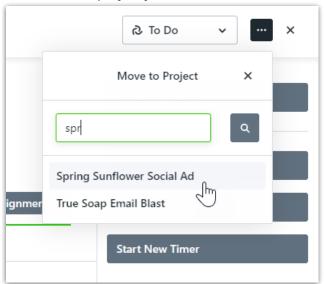


From the task details modal, select the actions menu on the top right corner and choose **Move to Project.**

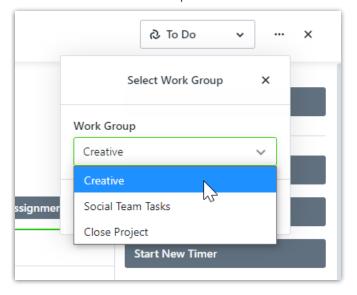




Search for the project you would like the task to be moved to and click to select.



If the project contains work groups, you'll be prompted to select a work group to move your task under. Select from the dropdown menu and click **Save** when complete.





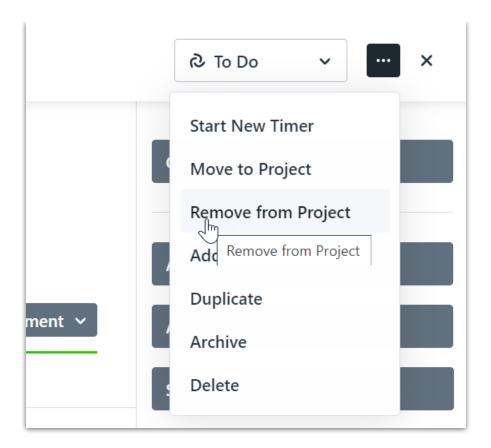
Any Specialties* assigned to the task will be assigned to the destination project.

Removing a Task from a Project

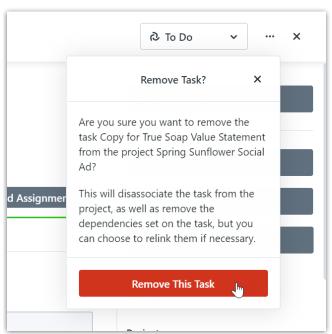
Remove a task from a project to make the existing task stand alone.

Similarly to the steps above, you can remove from a project using the actions menu in list views or the task details page. Select the actions menu of your choice and click the option to **Remove from Project.**





Select Remove This Task to confirm.





Any Specialties* assigned to the task will be removed.

^{*}Available only to Business & Enterprise customers