Tasks – Overwrite tasks at the customer level

Easily customize company tasks for individual customers by overriding details to fit specific client needs.

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Once tasks are created, they can be customized for a specific customer.

- Adjust task details, such as descriptions, requirements, or deadlines, to meet unique customer needs.

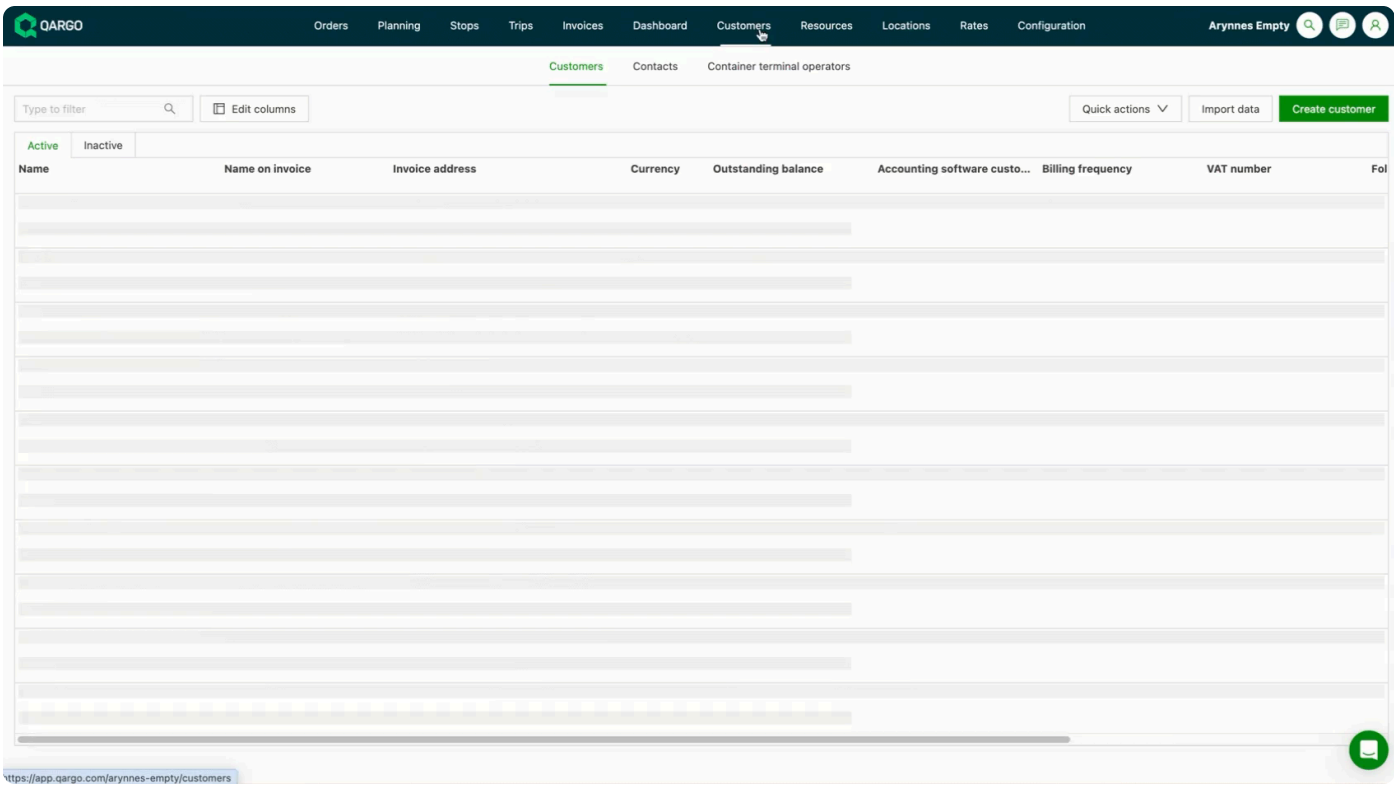
Terminology

Term	Definition
Task	A predefined activity or work item created at the company level.
Customer	A client or organization that the company provides services for.
Override	The process of modifying a company-level task for a specific customer.
Configuration	The customized setup or settings applied to a customer's task.

Steps to override a task for a specific customer

1. **Navigate to Companies**
   - Click **Customers** in the header menu.
2. **Select a customer**
   - Choose a customer from the list.
3. **Open a task**
   - Scroll down and click one of the tasks displayed on the left side.
4. **Override the task**
   - Click the **'Override for this customer'** toggle.
5. **Edit task details**
   - Modify the necessary details, such as title, description, deadlines, or other configurations.
6. **Save the changes**
   - Click **Save** to apply the override.

> ‼️ **Multiple 'Override' toggles may appear in the task. Make sure to select the correct toggle to override.**
> *Example:* 'Send invoice' task overrides can be set on **conditions** for required documents, or for **configuring** how the invoice is sent.



📚 The **"Override for this customer"** toggle only exists on **Generate document**, **Upload document**, and **Contact** tasks.
For all other task types (e.g., **General**), there is no per-customer override. Instead, the task's global default can be set to **Always skip**. Then, for each customer that needs the task, the **Complete task** setting can be changed to **Manual** or **Automatic** to trigger it for that customer.

Summary

The "Override for this customer" feature maintains a standardized company-wide task structure while providing flexibility to meet specific customer requirements. This ensures efficiency, consistency, and tailored service delivery.