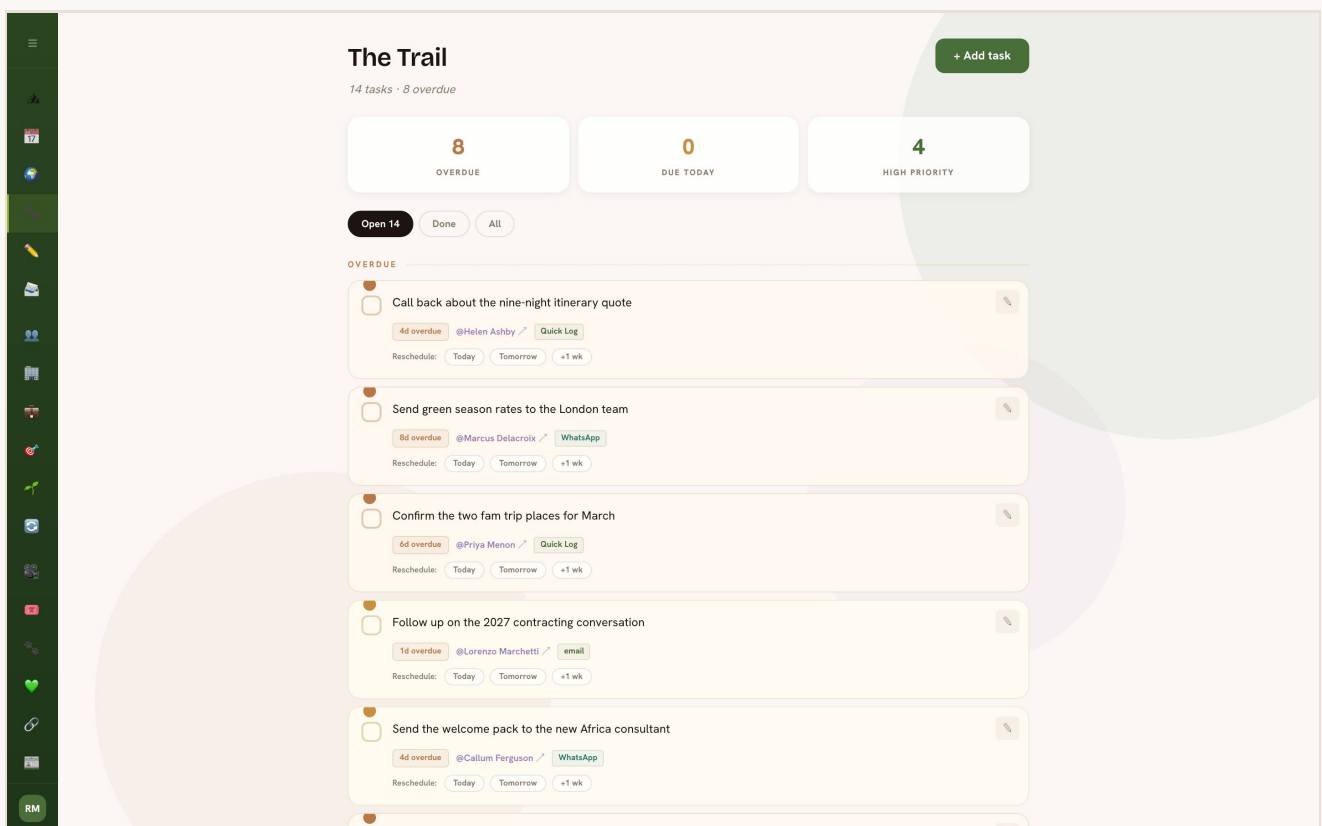


Track your tasks

The Trail is where every follow-up lands in one place — sorted by what's overdue, what's due today, and what matters most. Here's how to work it in under a minute.

Covers `/dashboard/tasks` · for rep, dmc



The screenshot shows the 'The Trail' task management interface. At the top, it says 'The Trail' with a subtitle '14 tasks · 8 overdue'. There are three summary cards: '8 OVERDUE', '0 DUE TODAY', and '4 HIGH PRIORITY'. Below these are filters: 'Open 14', 'Done', and 'All'. The main section is titled 'OVERDUE' and lists five tasks, each with a checkbox, a description, a due date, and a reschedule button. The tasks are: 'Call back about the nine-night itinerary quote' (4d overdue, @Helen Ashby, Quick Log), 'Send green season rates to the London team' (8d overdue, @Marcus Delacroix, WhatsApp), 'Confirm the two fam trip places for March' (6d overdue, @Priya Menon, Quick Log), 'Follow up on the 2027 contracting conversation' (1d overdue, @Lorenzo Marchetti, email), and 'Send the welcome pack to the new Africa consultant' (4d overdue, @Callum Ferguson, WhatsApp). A sidebar on the left contains various icons, and a green 'RM' button is at the bottom left.

The steps

01 Open The Trail

The Trail gathers your action items into one list. The subtitle shows how many are open and how many have slipped overdue.

02 Filter Open, Done or All

The three pills switch the view. Open is your working list; Done is what you've cleared; All shows both.

03 Read the priority pins

The dot on each card marks priority — terracotta for high, gold for medium, green for low — so the urgent work reads at a glance.

04 Follow the due date and links

The date badge shows "Due today", "Tomorrow" or "Xd overdue". The lavender @name is a one-tap jump to that contact; client chips show who it's for.

05 Reschedule in one tap

The Reschedule row bumps the due date without opening anything — Today, Tomorrow or +1 wk.

06 Complete and log it

Tick a task and it's marked done. When it's linked to a contact, RepBud offers to log the completion to their history so the timeline stays current.

07 Keep the list tidy

A cleared task drops out of Open; flip to Done any time to review what you've finished.

Next: Log an interaction (The Lantern)

Questions

What's the difference between Open, Done and All on The Trail?

Open is your live to-do list, Done shows tasks you've ticked off, and All shows both together. The view opens on Open so you see what still needs doing first.

How does the quick reschedule work?

The Reschedule row on each open task sets the due date to Today, Tomorrow or one week out in a single tap — no need to open the editor.

What happens when I complete a task linked to a contact?

Tickling it done marks the task complete and offers to log the completion to that contact's history, so their timeline reflects the follow-up. You can add a note or skip the log.

Why are some tasks marked overdue or high priority?

The date badge flags anything past its due date, and the coloured pin shows priority — terracotta high, gold medium, green low — so the work that needs attention sorts to the top.