

Tasks Bulk Upload Instructions

Common Instructions

- You can edit your data in the sample file. The column order must be the same as in the sample file.
- Columns marked with * are required.

Column Specific Necessary Instructions

1. Status ID: You must have the necessary authorization to set this status.
2. Project ID: You must be a participant in the project or have an admin role or granted all data access.
3. Date format for **Start Date** and **End Date** must be YYYY-MM-DD (e.g., 2024-01-01).
4. User IDs: Users must be participants in the project.
5. Client Can Discuss:
 - 1 means** the client can participate in project discussions.
 - 0 means** the client cannot participate in project discussions.
6. Is Favorite:
 - 1** means the task is marked as **favorite**.
 - 0** or leaving the field **blank** means the task is **not a favorite**.