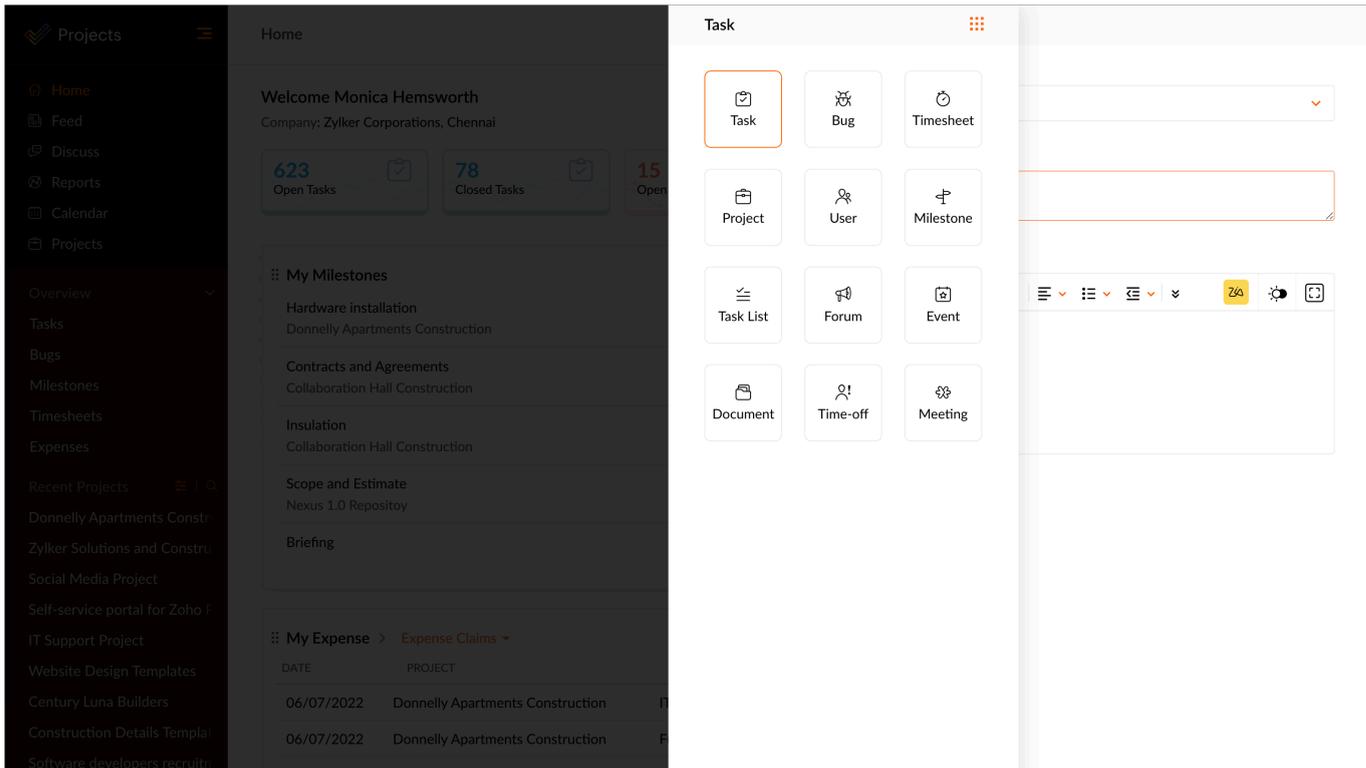




Global Add

Global Add makes it easy to add tasks, task lists, issues, phases, timesheets, forums, projects, and users without navigating to their specific modules. Simply click  on the upper right corner of the top band to add new entries.





Use cases

Sales: Sales reps are mostly on the go, and many a times tasks are added on the go. In such circumstances, sales reps can use this **Global Add** feature to quickly add the task rather than the time-consuming steps of choosing the project, switching to the Tasks tab, then adding the task.

Construction: When you have multiple issues to be added across multiple projects, navigating inside each project to add them can be cumbersome. You can use the **Global Add** option to add issues to the projects from a single page.

Software development/ IT: Developers can work on many tasks at once. This **Global Add** option makes it simple to add a new task to a project and upload a new document to another project.

Benefits

- Add work items from any page.
- Add work items without leaving the current page.
- Immediately open the work item if needed.

Task

1. Click  in the top band of Zoho Projects.
2. Hover over  to view more options. Select Task option.
3. Fill in the details and then click **Add**. Click **Add More** to save and add another task.

Task List

1. Click  in the top band of Zoho Projects.
2. Hover over  to view more options.
3. Select *Task List*.
4. Fill in the details and click **Add**.

Issue

1. Click  in the top band of Zoho Projects.
2. Hover over  to view more options.
3. Select *Issue*.
4. Fill in the details and click **Add**. Click **Add More** to save and add another task.

Phase

1. Click  in the top band of Zoho Projects.
2. Hover over  to view more options.
3. Select *Phase*.
4. Fill in the details and click **Add**.
 - Select *Internal* if the visibility is only to the project users.
 - Select *External* if the visibility is to both client and project users.
5. Click **Add** to save the new phase.

Timesheet

1. Click  in the top band of Zoho Projects.
2. Hover over  to view more options.
3. Select *Timesheet*.
4. Fill in the details and click **Add**.

Forum

1. Click  in the top band of Zoho Projects.
2. Hover over  to view more options.
3. Select Forum.
4. Enter a title for your forum, type a brief on your title in the Description section, attach files, and choose a Category (if any).
5. Click **Publish** to post the forum.

Project

1. Click  in the top band of Zoho Projects.
2. Hover over  to view more options.
3. Select Project.
4. Fill in the details and click **Add**.

Users

1. Click  in the top band of Zoho Projects.
2. Hover over  to view more options.
3. Select *Users*.
4. For Existing Users, select the email addresses of the user and then click **Add**.
5. For New Users, enter the email addresses, select the *Role*, *Profile*, and enter the *Rate Per Hour*. Click **Add**.

Events

1. Click  in the top band of Zoho Projects.
2. Hover over  to view more options.
3. Select *Event*.
4. Select a project and enter an event title.
5. Set the start and end date for the event.
6. Schedule a reminder, add a location, and add comments if required.
7. Set a frequency for the event.
8. Click **Save**.

Documents

1. Click  in the top band of Zoho Projects.
2. Hover over  to view more options.
3. Select *Document*.
4. Select a project.
5. Attach your files and click **Add**.

Time-Off

This requires [Zoho People integration](#).

1. Click  in the top band of Zoho Projects.
2. Hover over  to view more options.
3. Select *Time-Off*.
4. Fill in the details and submit.

Meeting

This requires [Zoho Meeting integration](#).

1. Click  in the top band of Zoho Projects.
2. Hover over  to view more options.
3. Select *Meeting*.
4. Fill in the details and then click **Save**.

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