Flowbit

WORK · TASKS

Work Guide

Tasks, spaces, projects, teams, meetings, posts, time tracking, whiteboards, reports and the Arc assistant, step by step.

Flowbit 2.0 October 2026 27 topics · 21 screens · 15 questions

Screens from the demo workspace "Vistaar WebX"

Who this is for

Everyone on the team. Members plan and finish tasks, log time and post updates; managers and leads also create projects and teams, approve time and read the reports. Owners and admins can use the last part to share work with clients.

> **GOOD TO KNOW**
> What you see depends on your role and your plan. If a page or button in this guide is missing for you, ask the owner or an admin of your workspace.

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PART 1

Tasks

Statuses and priorities, the task list, quick add in plain words and the task side panel.

Work is where your team plans tasks and projects, meets, posts updates, logs time and sees how delivery is going. Everyone uses it; managers also approve time and read the reports.

Task basics: statuses, priorities and dates

These rules apply on every Work page, on Home and in the reports.

STATUS	MEANING
To do	Not started yet.
In progress	Someone is working on it.
In review	Waiting for a check or approval.
Blocked	Cannot move until something else happens. A reason is required.
Done	Finished. Flowbit records when it was completed.

Priority is one of Low, Medium (the default), High or Urgent. Lists sort Urgent first.

GOOD TO KNOW

Date rules:

- **Overdue**: not done, and the due date is before today. It shows in red, for example "4d overdue".
- **Due today**: not done, and due today.
- **This week**: not done, and due today or in the next six days.
- The due date cannot be before the start date.
- Every task needs at least one assignee. New tasks are assigned to you unless you pick someone else.

Assignees get a reminder on the day a task is due and again once it is overdue.

GOOD TO KNOW

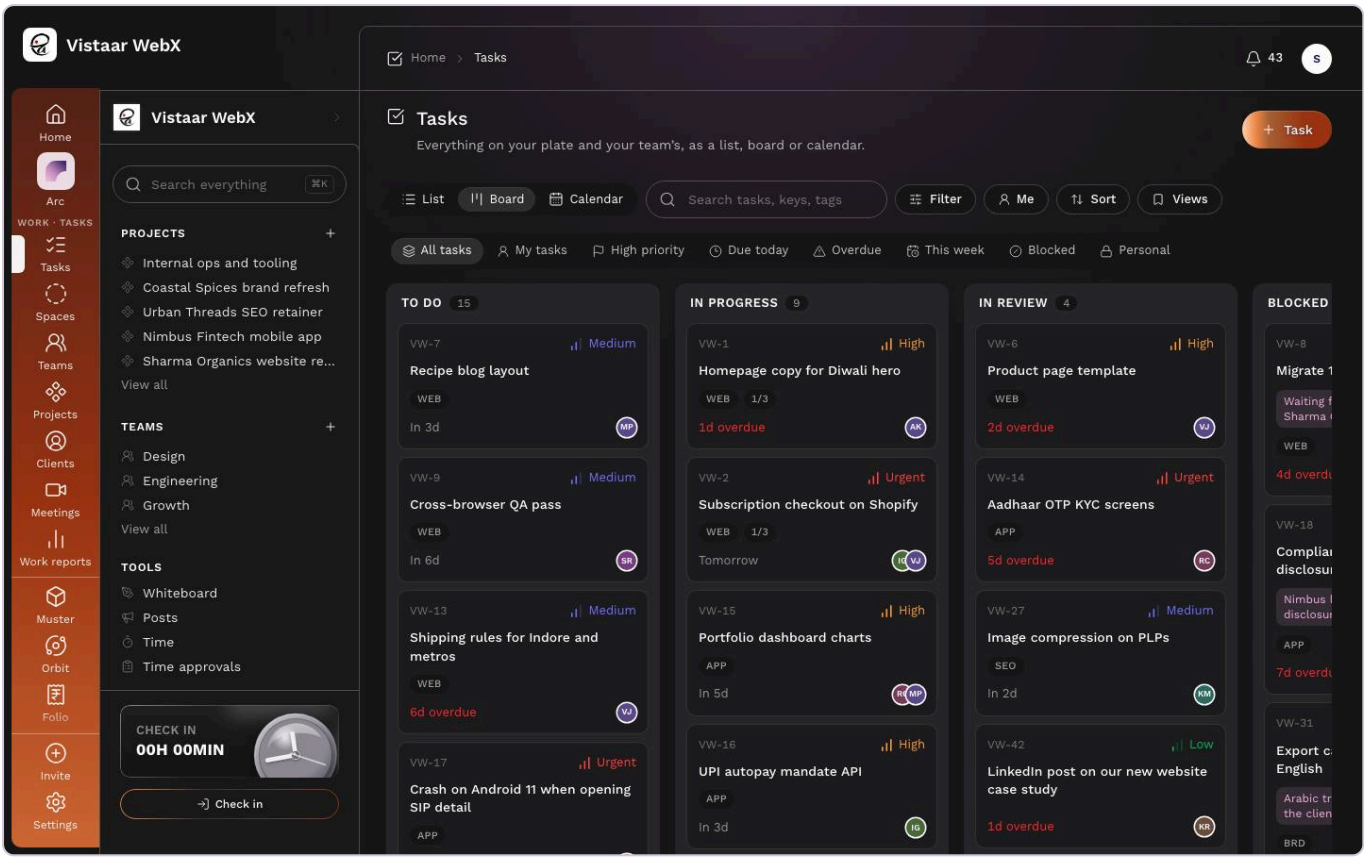
Blocked: moving a task to Blocked opens **Why is this blocked?**. Type the reason; you can type @ to tell someone, and they get a notification. To unblock, choose any other status or click **Unblock**.

Who sees which tasks: you see tasks you created, are assigned to or watch, tasks in projects you are on, tasks in spaces you belong to, and tasks of people in teams you lead. Owners, Admins and Managers see every task except other people's personal tasks.

Tasks

Open: **Rail → Tasks** `/app/work/tasks` Who: everyone

Everything on your plate and your team's, as a list, a board or a calendar.



Board view. Each card shows the task key, priority, project code, due label and assignees.

ON THIS PAGE

- View switcher: **List**, **Board** (one column per status) and **Calendar** (tasks on their dates, with a **No due date** tray).
- **Search tasks, keys, tags**: searches titles, descriptions, tags, task keys such as VW-42, assignee, project and client names.
- **Filter**: Status, Priority, Due date, Assignee, Created by me, Project, Client, Space and list. Active filters appear as chips you can remove one by one.
- **Me**: only tasks assigned to you. **Sort**: choose the field and ascending or descending.
- **Views**: save the current filters, view and sort under a name, optionally with **Share with everyone**.
- Quick links: **All tasks**, **My tasks**, **High priority**, **Due today**, **Overdue**, **This week**, **Blocked**, **Personal**.
- List columns: Task Name, Assignee, Due, Priority, and a row menu with **Copy link**, **Move to project...** and delete. Badges show Blocked, Personal and subtasks done.

CREATE A TASK

1. Click **Task** at the top right.
2. Enter a **Title** (at least 3 characters) and, if useful, a **Description**.
3. Set **Status**, **Priority** and **Assignees**.
4. Pick a **Start date** and **Due date**.
5. Optionally pick a **Project** (the client fills in from the project), a **Client**, and a **Space** with its **List**. If you pick a space you must pick a list too.
6. Add **Tags**, an **Estimate** such as 2h 30m, and any **Attachments**.
7. Click **Create task**. Assignees get a notification.

> **TIP**
> For speed, type a title in **Add a task and press Enter** at the top of the list, or in the box at the top of a board column. The task takes that column's status and is assigned to you. In the calendar, click a day to add a task due that day.

MOVE TASKS ALONG

1. In Board view, drag a card to another column. Dropping into Blocked asks for a reason; dropping into Done records the completion time.
2. In List view, tick several rows to open the bulk bar: **Status**, **Priority**, **Assign to...**, **Due date**, **Project** or **Delete**. Tasks you are not allowed to change are skipped and the message says how many.

PERSONAL TASKS

Open **Personal** and add a task there to make a private to-do. Only you and people you share it with see it. Personal tasks are assigned to you only and never show in team lists, dashboards or reports.

Quick add in plain words

Open: **Tasks, boards, calendars, project and space Tasks tabs, Home → Assign to me**

Who: everyone who can add tasks

Type a task the way you would say it, in English or Hinglish, and Flowbit reads the date, time, person, project and priority as you type. What it understood shows as chips under the box; click the X on a chip to keep that word as plain text.

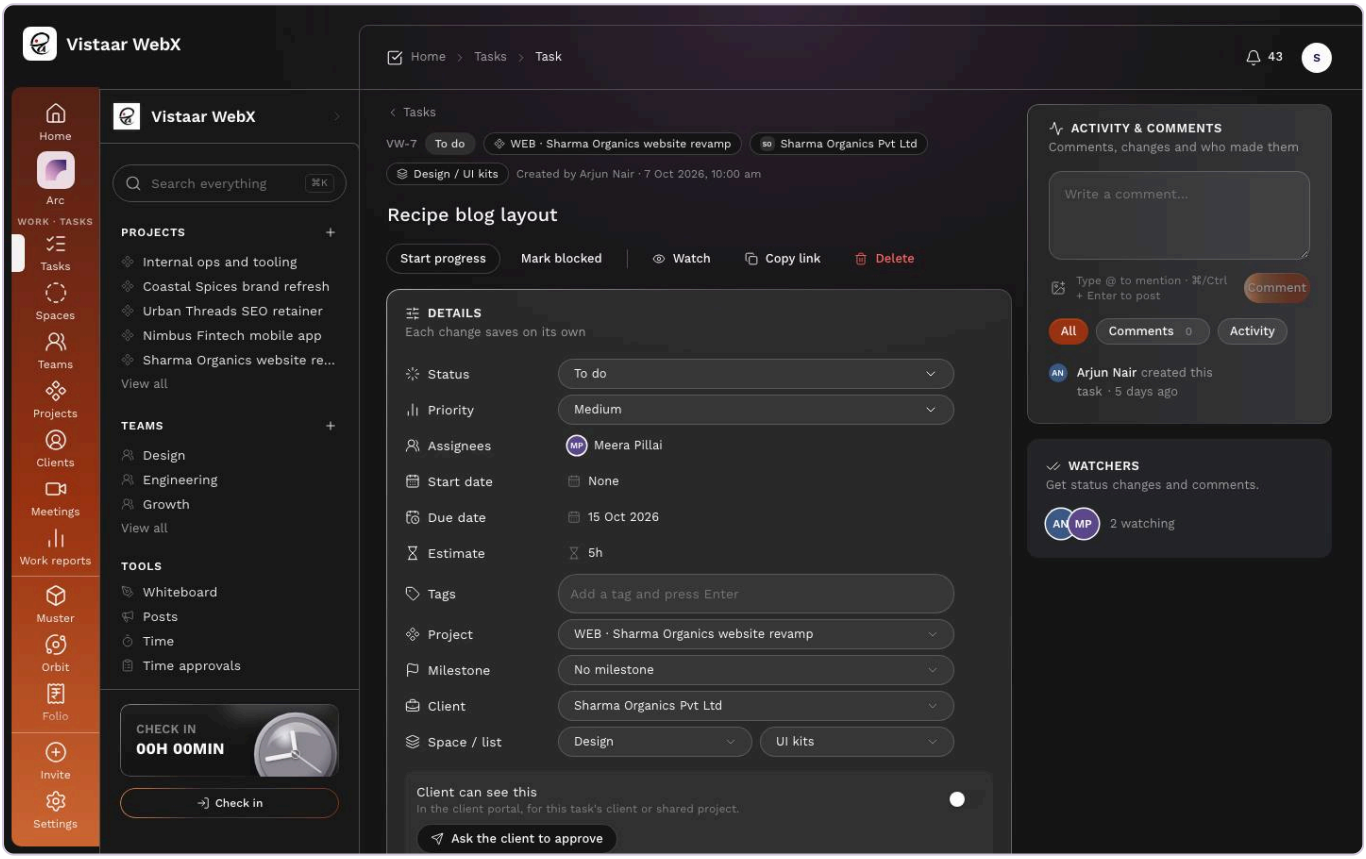
- **Dates:** aaj or today, kal or tomorrow, parso, a weekday (Monday or somvar), next mon or agle hafte, 15 oct, in 3 days or 3 din mein.
- **Times:** 5pm, 17:30, 5 baje, subah, shaam, raat, for example "kal shaam 6 baje".
- **Tokens:** `@name` assigns a person, `#project` (or a list or space), `!client`, and `p1` to `p4`, `!!` (high) or `!!!` (urgent) for priority.

> **TIP**
> Example: "kal 5 baje @vikram #design homepage banner p2" makes a task for Vikram in the Design project, due tomorrow at 5 pm, high priority.

A task in detail

Open: **Tasks → click a task** `/app/work/tasks/{id}` Who: anyone who can see the task

Everything about one task: details, description, subtasks, checklist, files, time and the conversation.



The task key, status, project and space sit above the title. Comments and history are on the right.

ON THIS PAGE

- Header: key, status, project and list, who created it and when. Click the title to rename it (Enter saves, Esc cancels).
- Action bar: the next step for the status (**Start progress**; **Send for review** or **Mark done**; **Unblock**; **Reopen**), **Mark blocked**, **Watch** / **Unwatch**, **Copy link** and **Delete**.
- **DETAILS**: Status, Priority, Assignees, Start date, Due date, Estimate, Tags, Project, Milestone, Client, Space / list. Each change saves on its own.
- **DESCRIPTION**: saves when you click away.
- Subtasks, checklist, attachments and time logged against the task.

- **ACTIVITY & COMMENTS** with **All**, **Comments** and **Activity** filters. **WATCHERS** lists who gets status changes and comments.

SUBTASKS AND CHECKLIST

- **Subtasks** are real tasks under this one, each with its own status, assignee and dates. Type in **Add a subtask and press Enter**. A subtask cannot have its own subtasks. Cards show "done/total".
- **Checklist** items are simple ticks. Type in **Add an item and press Enter**.

COMMENT AND MENTION SOMEONE

1. Click **Write a comment...**.
2. Type @ and pick a person to mention them. They get a notification.
3. Click **Comment**, or press ⌘/Ctrl + Enter.
4. Use **Reply**, **Edit**, **Delete** or a reaction on any comment. Deleting a comment also deletes its replies.

ATTACH FILES AND LINKS

1. Click **Upload files**, or drop files on the panel. Images and PDFs open in a preview.
2. For a link (Figma, Google Drive), click **Add a link**, fill **Title** and **URL**, then **Add link**.

DELETE A TASK

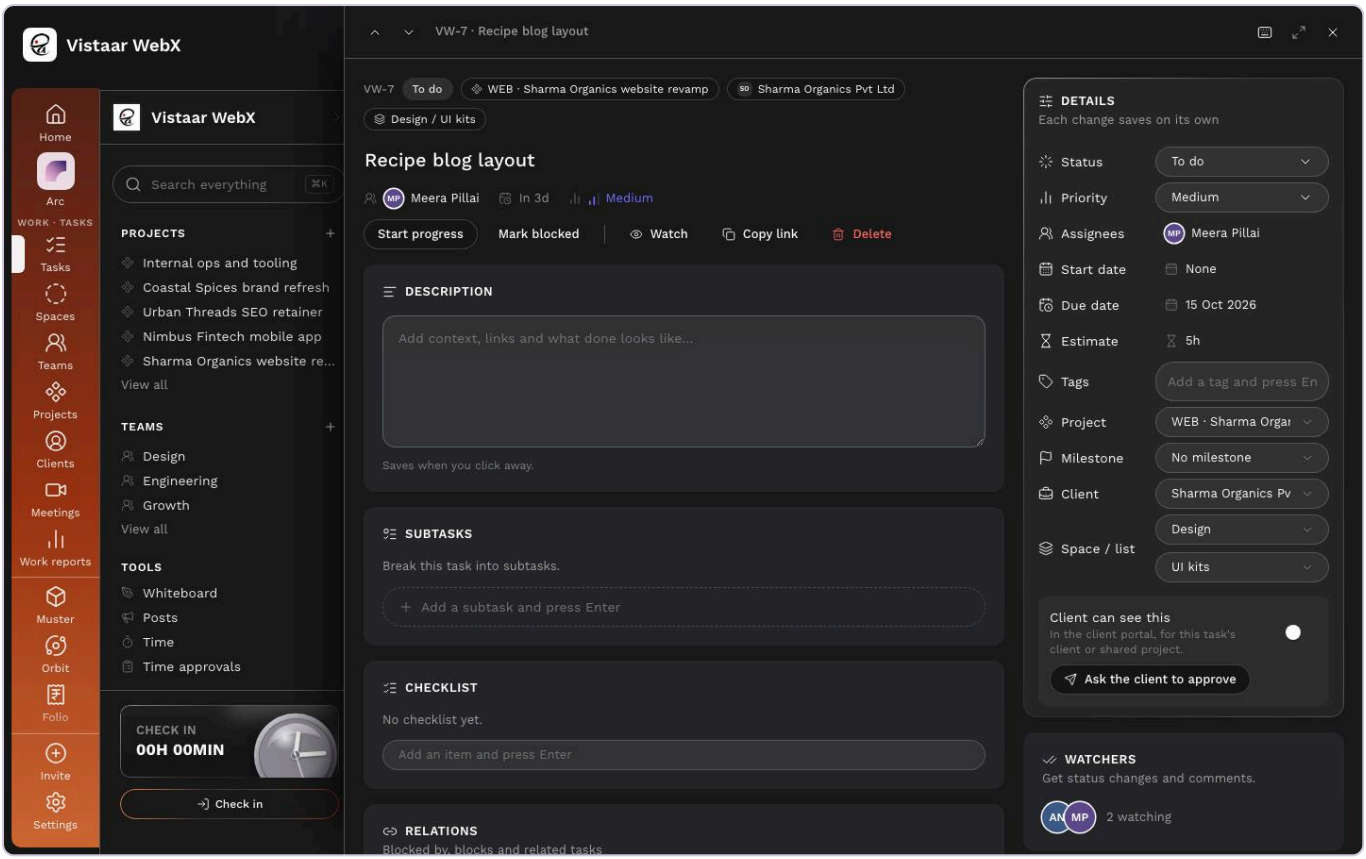
1. Click **Delete** and confirm with **Delete task**. Subtasks, comments and time entries go with it.

> **CAREFUL**
> Deleting cannot be undone. A task with time in a submitted or approved timesheet cannot be deleted until the manager sends that week back.

The creator, the assignees and Managers or above can edit and delete a task.

Task side panel

Clicking a task in a list, board, calendar, Home or the bell opens it in a panel on the right, so you keep your place in the list. A refresh or a shared link still opens the full task page.



The side panel. The arrows at the top move between tasks; the X closes it.

- Keys: `J` and `K` move to the next or previous task, `E` edits the title, `M` assigns it to you, `?` lists the shortcuts and `Esc` closes the panel.
- **Blocked by** and **Related** links between tasks. A task waiting on another shows an orange flag; the blocker shows red until it is done.
- Comments, subtasks, checklists and attachments work as on the full page. Comments post at once and show "Sending..." until saved.

PART 2

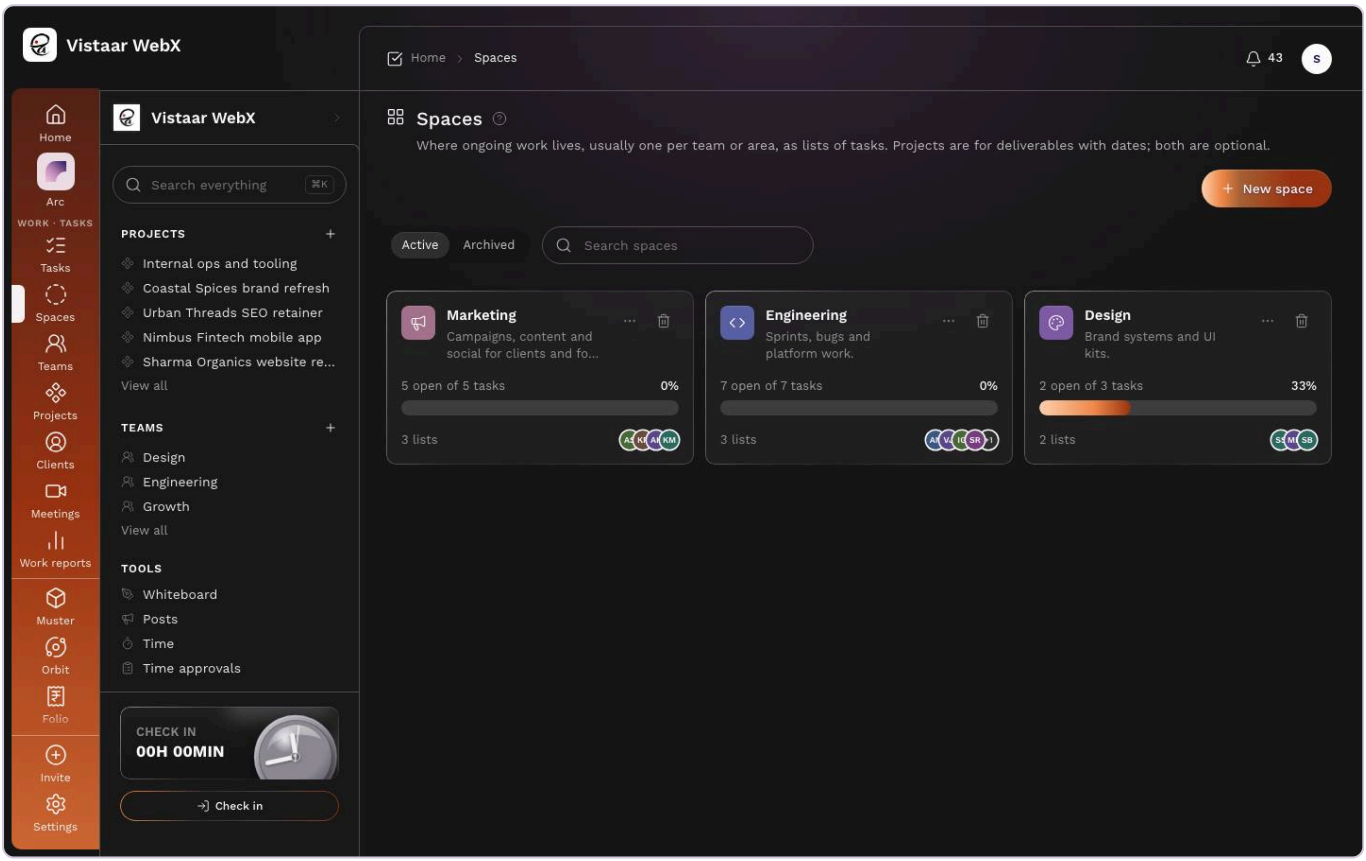
Spaces, projects and teams

Where the work lives and who does it.

Spaces

Open: **Rail → Spaces** `/app/work/spaces` Who: everyone

A space groups lists of tasks by team or area, for example Marketing, Engineering or Design. Inside a space, tasks live in lists.



Each card shows open tasks, progress, number of lists and members.

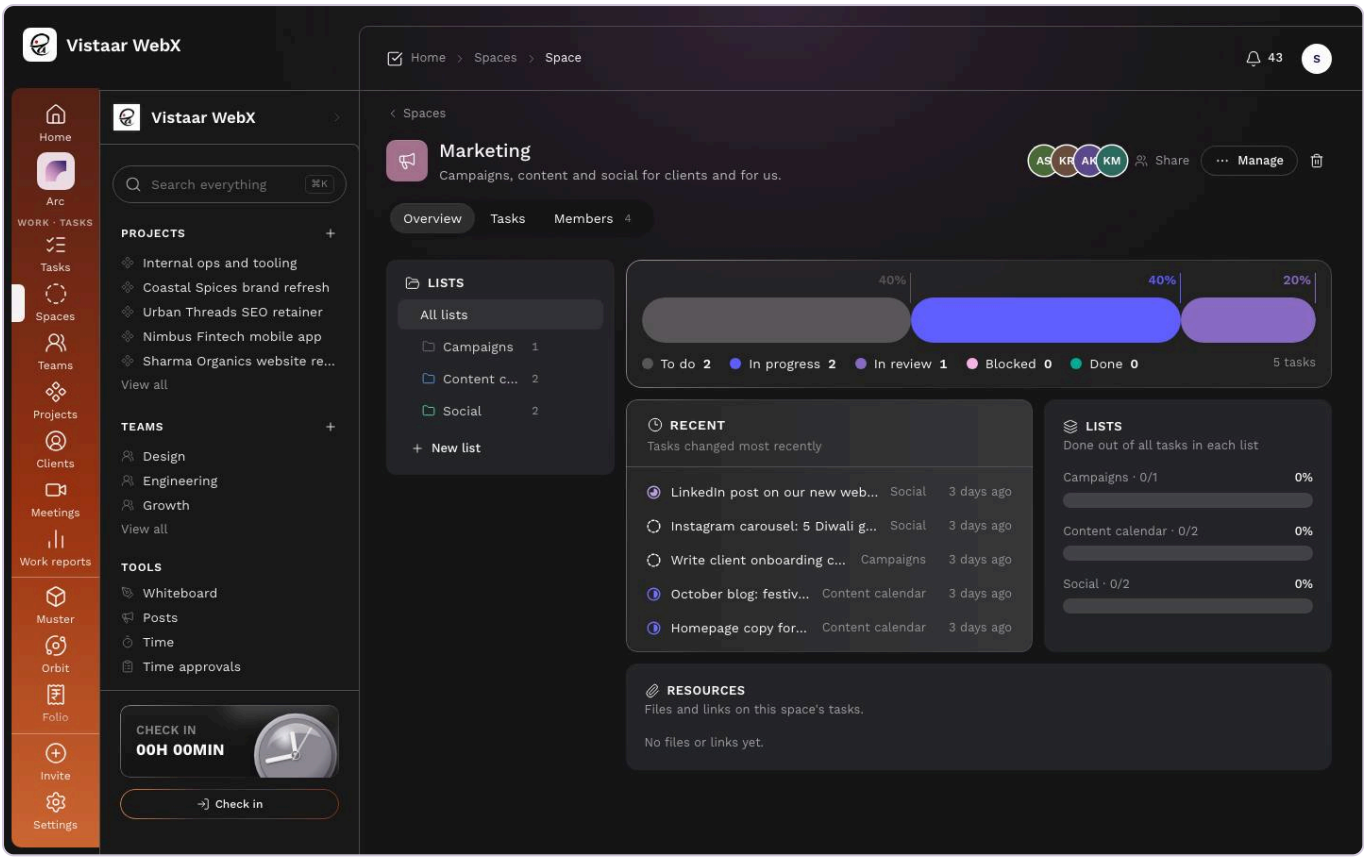
CREATE A SPACE

1. Click **New space**.
2. Enter a **Name** and **Description**, and pick a **Colour** and **Icon**.
3. Click **Create space**. You become its first member.

Use the **Active** / **Archived** tabs and **Search spaces** to find one.

Inside a space

Open: **Spaces → click a space** `/app/work/spaces/{id}` Who: space members, Managers and above



The Overview tab: status split, recent tasks, progress per list and files from the space's tasks.

ON THIS PAGE

- Header: member avatars, **Share**, **Manage** (edit name, colour, icon; archive or restore) and delete.
- **LISTS** column: **All lists** and each list. **New list** adds one.
- Tabs: **Overview** (status split, recent tasks, **LISTS** progress, **RESOURCES**), **Tasks** (the full task list, board or calendar for this space) and **Members**.

ADD A LIST

1. Click **New list**.
2. Enter a **Name**, optional description and colour.
3. Click **Create list**.

SHARE THE SPACE

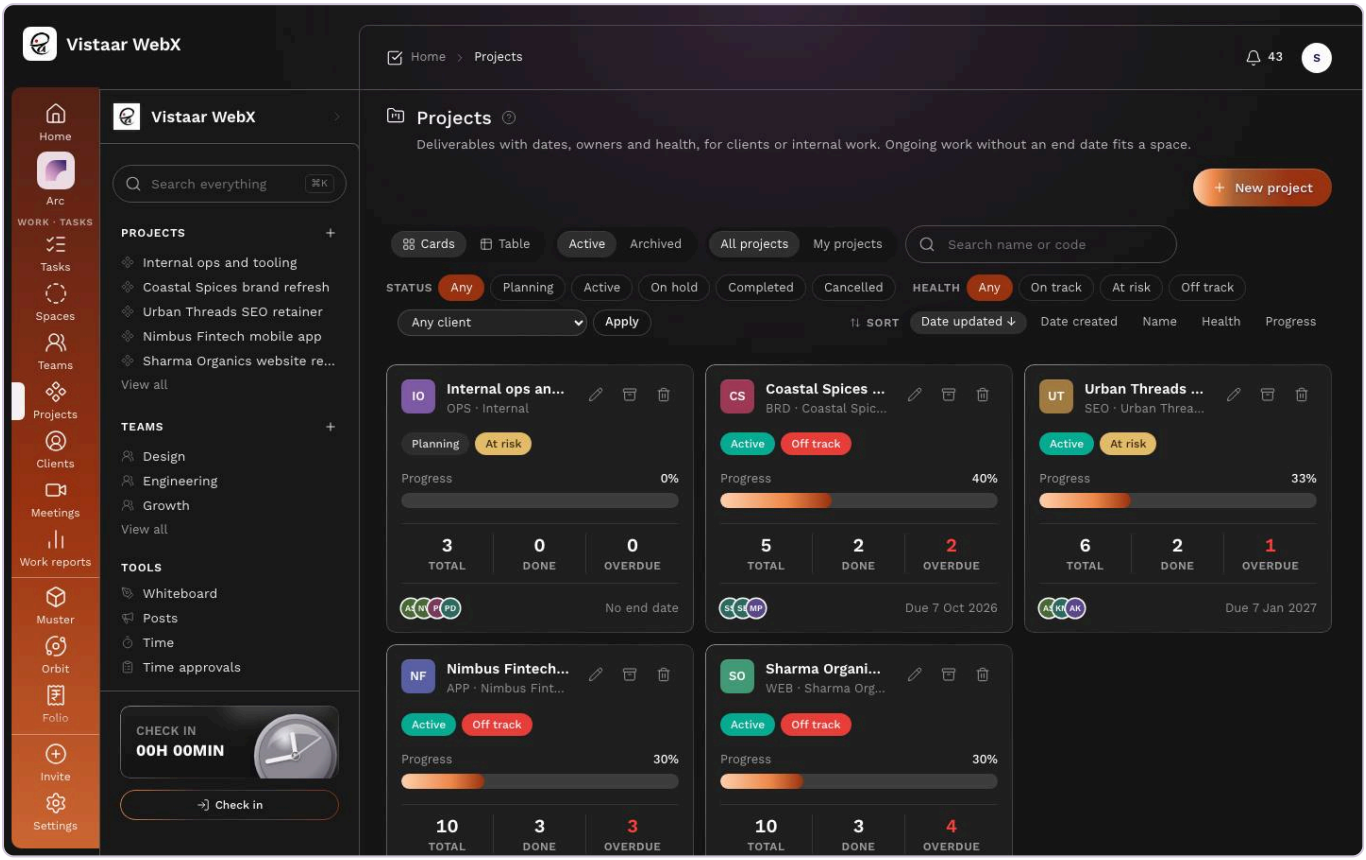
1. Open **Members** or click **Share**.
2. Click **Add people** and pick teammates. Members get full access to every list.
3. To take someone out, click **Remove**. Their tasks stay. Anyone can **Leave** a space; afterwards they see only their own tasks in it.

> **GOOD TO KNOW**
> Deleting a space that still has tasks archives it instead. An empty space is deleted. Archived spaces can be restored from the **Archived** tab. Lists can be archived and restored the same way.

Projects

Open: **Rail → Project** `/app/work/projects` Who: everyone sees projects they are on; Managers and above see all

A project groups the tasks, milestones and files for one piece of client or internal work, with a progress figure and a health score.



Each card shows status, health, progress and Total, Done and Overdue counts.

ON THIS PAGE

- **Cards** or **Table**; **Active** or **Archived**; **All projects** or **My projects**; **Search name or code**.
- Filters: **STATUS** (Planning, Active, On hold, Completed, Cancelled), **HEALTH** (On track, At risk, Off track) and client, then **Apply**.
- **SORT**: Date updated, Date created, Name, Health, Progress.

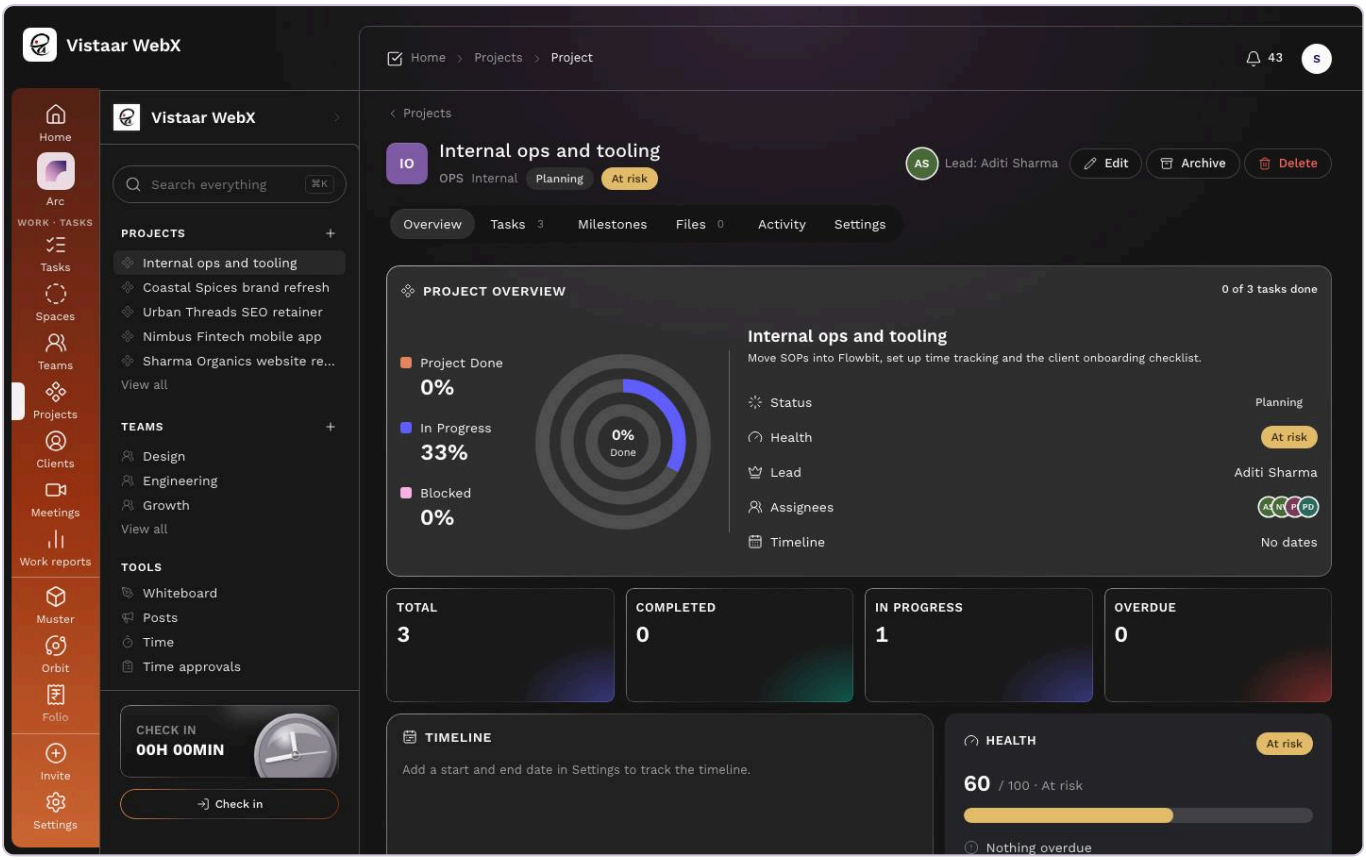
CREATE A PROJECT

1. Click **New project**.
2. Enter the **Project name**. Leave **Code** blank to get PROJ-001, PROJ-002 and so on, or type your own such as WEB.
3. Pick a **Client**, or leave it as internal. **New client** opens the client form.
4. Set **Status**, **Description**, **Start date** and **End date**.
5. Choose the **Lead** and add **Members**, a **Colour** and **Tags**.
6. Click **Create project**. The lead gets a notification.

> **GOOD TO KNOW**
> **Progress** is done tasks divided by all tasks (subtasks not counted). **Health** is a score out of 100 built from progress, overdue tasks, blocked tasks and how far through the timeline you are. 80 or more is On track, 60 to 79 is At risk, below 60 is Off track.

Inside a project

Open: **Projects → click a project** `/app/work/projects/{id}` Who: project lead, members, Managers and above



The Overview tab. The health card explains what is pulling the score down.

TABS

- **Overview**: progress rings, status, health, lead, people and timeline; cards for Total, Completed, In progress and Overdue; **TIMELINE** (time used against work done); **HEALTH**; task progress breakdown; next milestones; members; description.
- **Tasks**: the project's tasks as list, board or calendar. New tasks get this project and client.
- **Milestones**: the big moments, each with a title, due date and progress from its linked tasks. A milestone past its date and not done shows Overdue.
- **Files**: **Project files** you upload, plus attachments **From tasks** in this project.
- **Activity**: who changed what, newest first.
- **Settings**: edit the project and the danger zone.

ADD A MILESTONE

1. Open **Milestones** and click **Add milestone**.
2. Enter **Title**, **Due date** and optional **Description**, then **Save milestone**.
3. Link tasks by choosing this milestone in each task's **Milestone** field. The task must be in the project.

EDIT, ARCHIVE OR DELETE

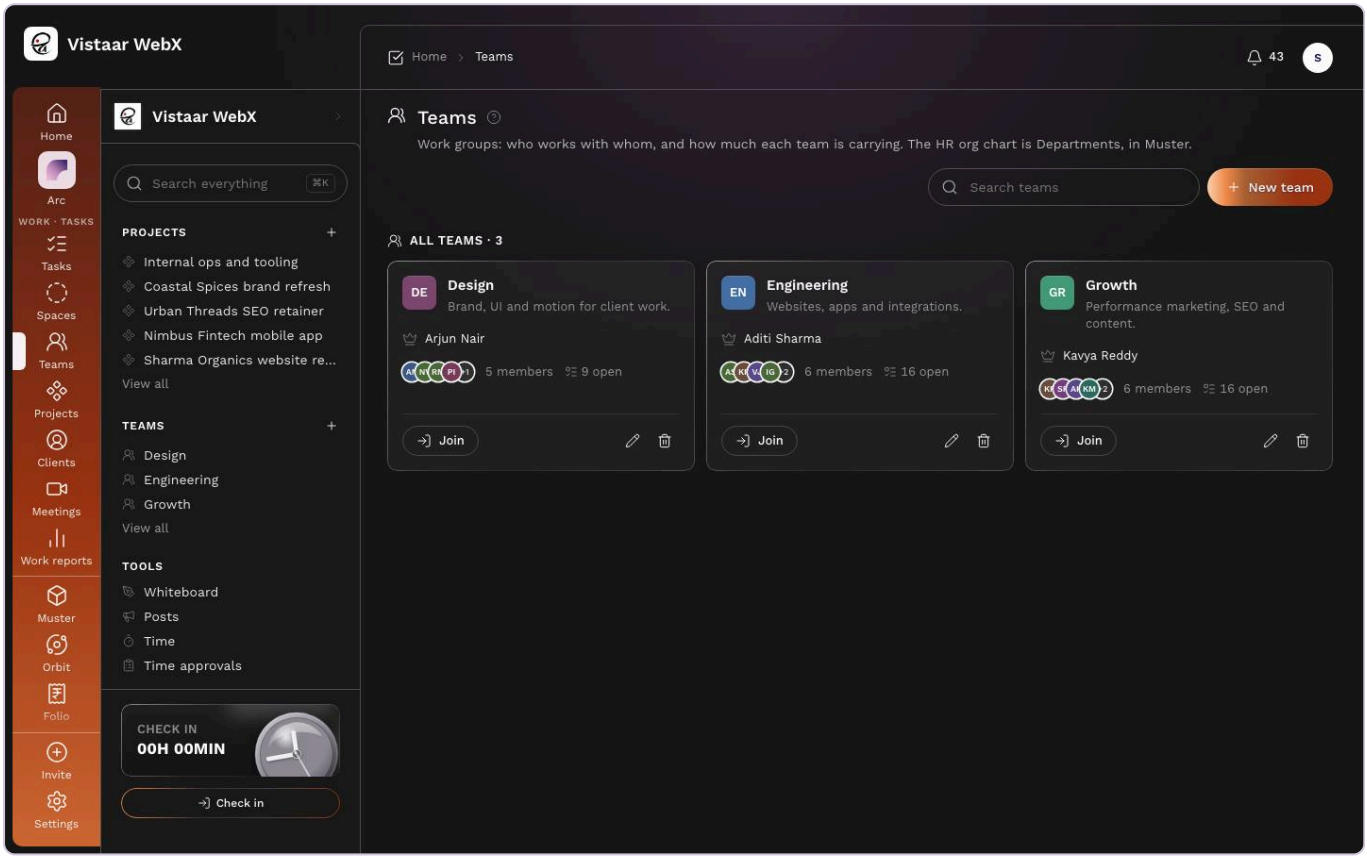
1. Click **Edit** to change details, lead or members.
2. When the work is finished, click **Archive**. It leaves the list and can be restored from **Archived**.
3. **Delete** removes only empty projects, and only Owners and Admins can do it.

CAREFUL
A project with tasks cannot be deleted. Delete or move its tasks first, or archive it instead.

Teams

Open: **Rail → Team** `/app/work/teams` Who: everyone sees teams; Managers and above create and edit

Teams group people who work together and show how much each team is carrying.



Each card shows the lead (crown), members and open tasks.

CREATE A TEAM

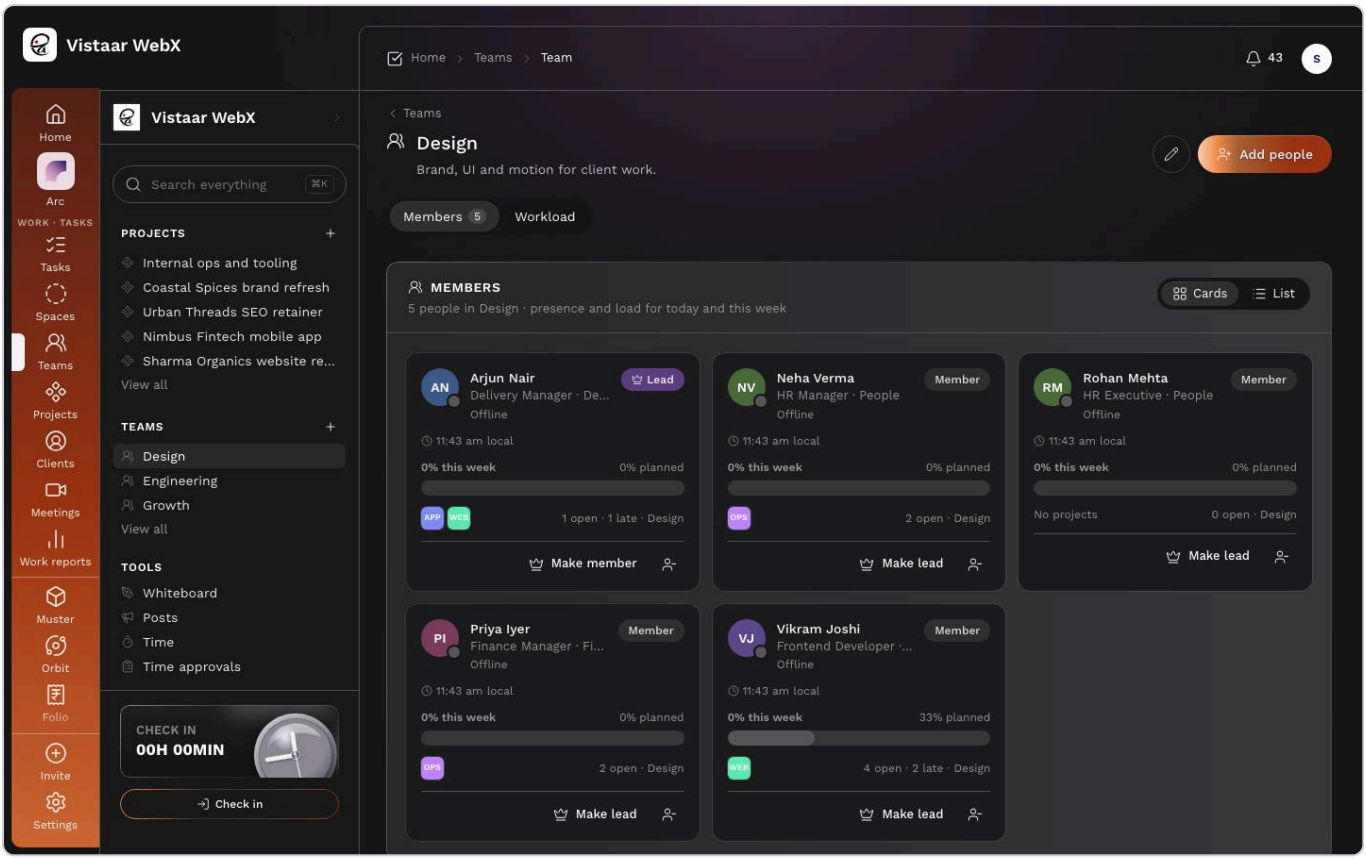
1. Click **New team**.
2. Enter **Team name** and **Description**, pick a colour, add **Members** and choose a **Team lead**.
3. Click **Create team**.

Anyone can click **Join** on a team or **Leave** one. Team names must be unique.

GOOD TO KNOW
A team lead sees the tasks of everyone in the team. Deleting a team removes its memberships; members' tasks stay.

Team members and workload

Open: **Team → click a team** `/app/work/teams/{id}` Who: everyone; Managers and above change members



The Members tab. Use the crown buttons to change the lead.

MANAGE MEMBERS

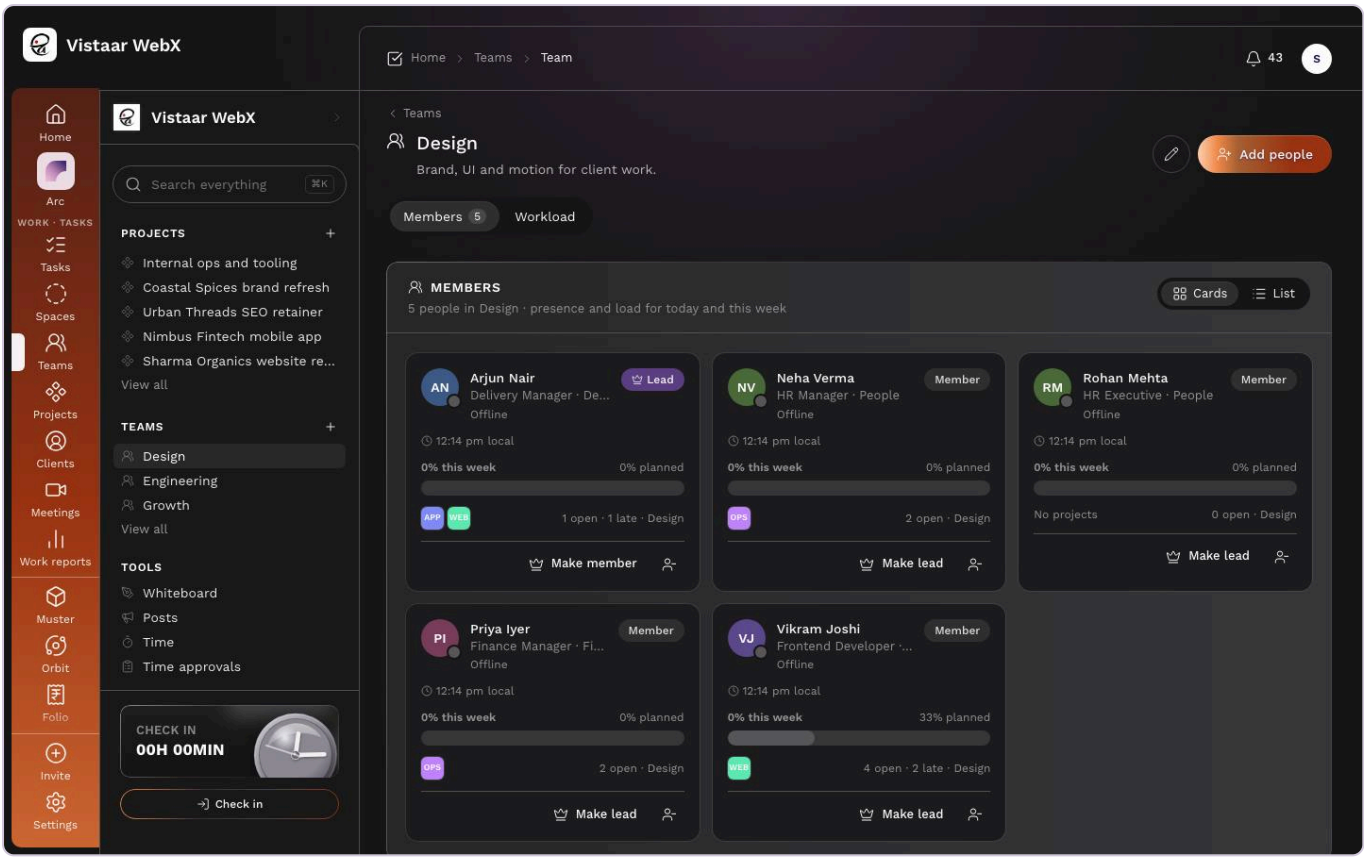
1. Click **Add people**, choose people and click **Add to team**.
2. Click **Make lead** on a member. A team has at most one lead, so first click **Make member** on the current lead.
3. Use the remove icon to take someone out.

READ THE WORKLOAD

Open **Workload**. For each person it shows Open, Overdue, Due in period, Blocked, Completed, Estimate open, Logged and Load. Load compares logged time with capacity (8 hours per working day). Green is under 70%, amber 70 to 100%, red over 100%. Click a person to see their tasks.

Team member cards

A team's **Members** tab shows cards or a list. Each card shows today's status (checked in, on break, on leave or offline), this week's workload, open and late tasks and the projects the person is on. A person on approved leave gets an amber dot on their avatar, and assigning them work for a leave day shows a warning.



Member cards: status, this week's load and open or late tasks for each person.

PART 3

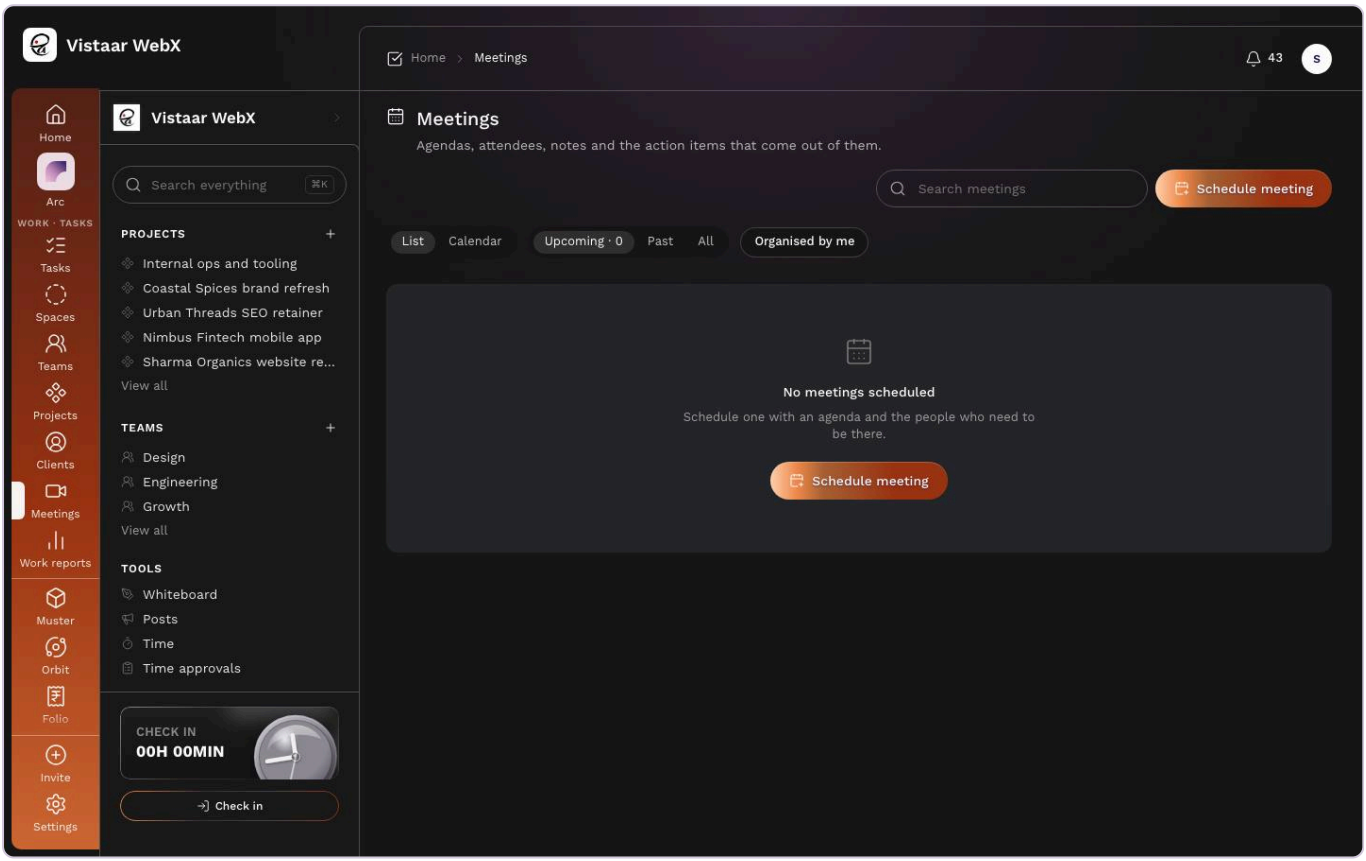
Meetings and posts

Meetings with Google Calendar and AI minutes, and the posts feed.

Meetings

Open: **Rail → Meeting** `/app/work/meetings` Who: everyone

Agendas, attendees, notes and the action items that come out of them. You see meetings you organise or attend.



The next meeting is marked **Next up**. **Join** appears when there is a link.

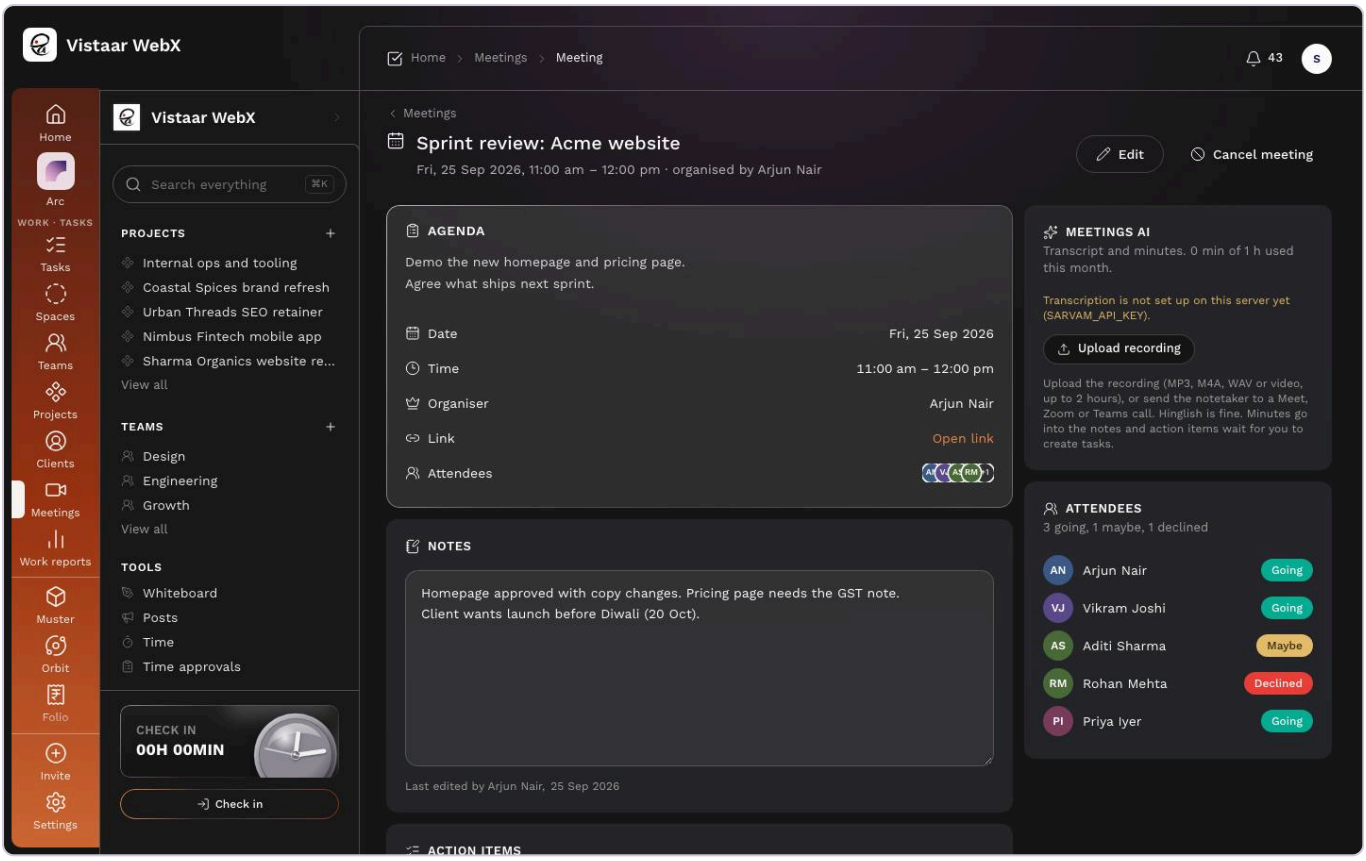
SCHEDULE A MEETING

1. Click **Schedule meeting**.
2. Fill **Title**, **Date**, **Start** and **End**.
3. Pick **Attendees**.
4. Paste a **Meeting link** (Google Meet, Zoom or Teams) and/or a **Location** such as Board room.
5. Write the **Agenda** and click **Schedule**. Attendees get a notification.

> **GOOD TO KNOW**
> End must be after start, and a meeting can be at most 12 hours. Flowbit does not create calendar events or video links for you; paste the link from your own tool.

A meeting in detail

Open: **Meetings → click a meeting** `/app/work/meetings/{id}` Who: organiser and attendees



The attendee list shows each person's reply.

REPLY TO AN INVITE

Click **Accept**, **Maybe** or **Decline**. The organiser sees the count, for example "1 going, 4 no reply".

TAKE NOTES AND TURN DECISIONS INTO TASKS

1. Type in the notes box. It saves when you click away.
2. Under **ACTION ITEMS**, type an item, pick an **Assignee** and **Due date**, and click **Add**.
3. Turn an item into a task with its create-task button. The task links back to the meeting.

CHANGE OR CANCEL

Only the organiser can **Edit** or **Cancel meeting**. Replies are kept for people who stay on the list. A cancelled meeting stays visible, marked Cancelled, and attendees are told.

Google Calendar and Meet

Open: **Settings** → **Google** (You group) `/app/settings/integrations/google`

Who: everyone, each for their own account

Connect your own Google Calendar and the meetings you schedule in Work go on it, with a Google Meet link added for you. Moving or cancelling the meeting in Flowbit moves or cancels it in Google. Your own upcoming Google events also show, greyed and read-only, on the Meetings calendar so you can see when you are free.

1. Open **Settings** → **Google** and click **Connect Google Calendar**.
2. Choose your Google account and allow access to calendar events.
3. Schedule a meeting without a link of its own. Its page now shows the Meet link and "On the organiser's calendar".

GOOD TO KNOW

Flowbit asks only for calendar events, never your email or contacts. Click **Disconnect** at any time to withdraw access. Attendees still get Flowbit's own invite email with a calendar file.

Meetings AI: transcript and minutes

Open: **Meetings** → **click a meeting** → **Meetings AI** Who: the organiser and attendees Plan: add-on, or during the trial

Meetings AI turns a meeting's audio into a transcript with speakers, then drafts the minutes for you: notes, decisions and action items with owners and due dates. It works with Hindi, English and a mix of both.

GET THE AUDIO IN

1. Open the meeting and find the **Meetings AI** card. It shows how many hours your workspace has used this month.
2. Either click **Upload recording** and pick the file (MP3, M4A, WAV, MP4 or WebM, up to 2 hours and 200 MB), or click **Send notetaker** before the call.
3. The notetaker, "Flowbit Notetaker", joins the meeting's Google Meet, Zoom or Teams link and announces itself in the chat. Attendees are emailed a notice that the meeting is being recorded. Use **Call off notetaker** if plans change.

READ THE MINUTES

1. While the audio is processed the card says **Transcribing**. When it is ready, the minutes are drafted into the meeting's notes and action items.
2. Click **Show transcript** to read who said what, and name the speakers so the transcript reads properly.
3. Check each action item, then create the tasks from it as usual. Click **Draft minutes again** if you changed the speaker names.

GOOD TO KNOW

Without the AI the notes quote the transcript instead of summarising it. Hours are capped per plan (none on Free, 1 hour on the trial and 5 hours per seat on paid plans by default).

CAREFUL

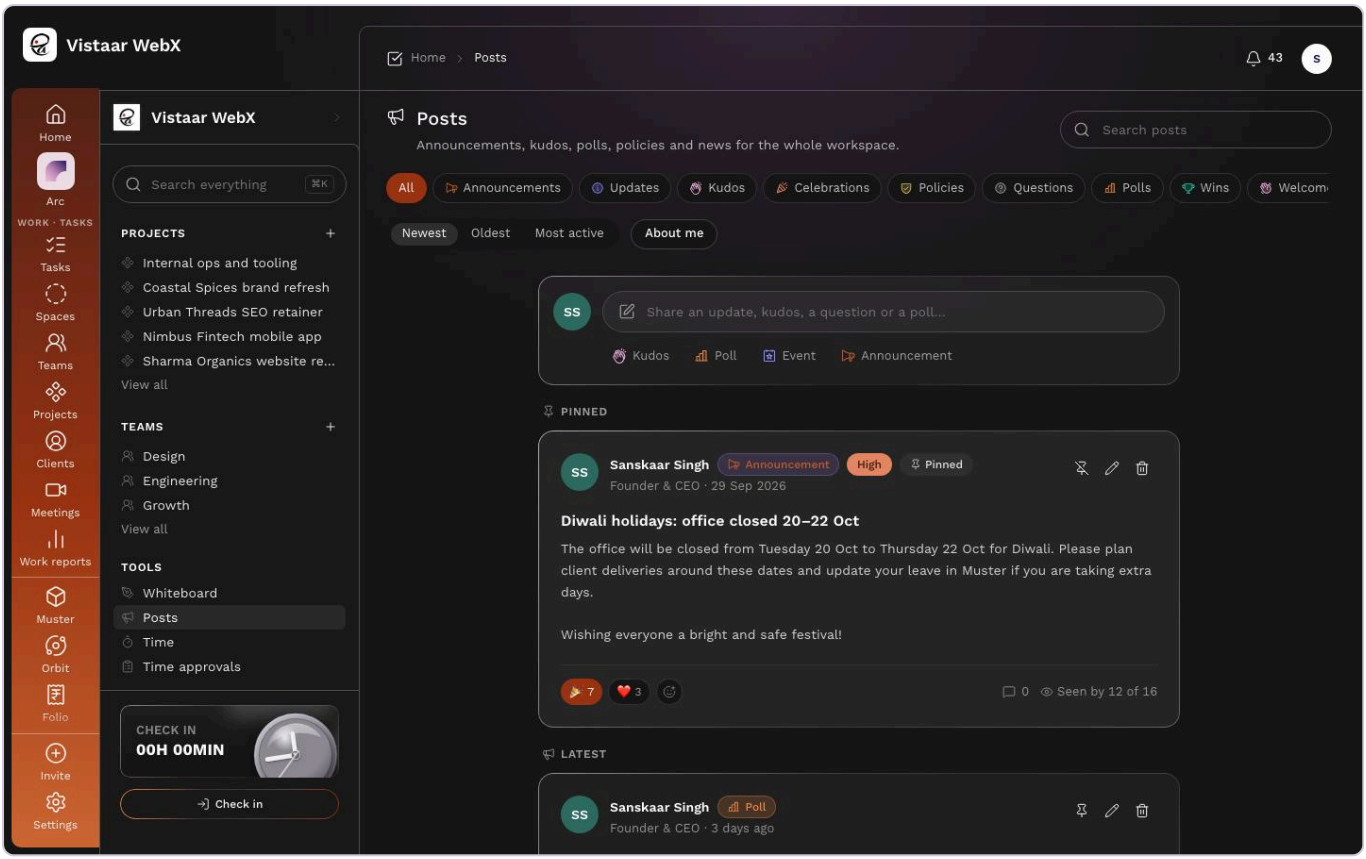
Delete recording and **Delete transcript** remove them for good. Recordings and transcripts are also deleted after the retention period set in Settings → Privacy (90 days by default).

Posts

Open: **Side panel** → **TOOLS** → **Posts** `/app/work/posts`

Who: everyone; announcements and policies by managers, HR and above

The workspace notice board: announcements, updates, kudos, polls, policies and more, each aimed at the people who need it.



Pinned posts stay at the top. "Seen by 11 of 16" is the read receipt. This screenshot shows the earlier feed; post types now appear as filter chips with icons.

THE TEN POST TYPES

TYPE	USE IT FOR
Announcement	Something everyone must see, with a priority (Low to Urgent). It also pops up when people next open Flowbit. Managers, HR and above only.
Policy	A rule people must read. Each person clicks **I've read this**; the author sees who has not, can **Export CSV** and remind only them. Managers, HR and above only.
Update, Win, Question	Everyday news, results and questions to the team.
Kudos	Thank one or more people by name. They and their managers are told, and it shows on their Muster profile.
Poll	2 to 8 **Options**, with **Allow several choices**, **Anonymous votes** and **Closes on**. Results show as live bars after you vote.
Celebration, Welcome	Birthdays, work anniversaries and new joiners. Flowbit can post these by itself from Muster dates (Settings → Automations).
Event	Something happening, with **When** and **Where**.

WRITE A POST

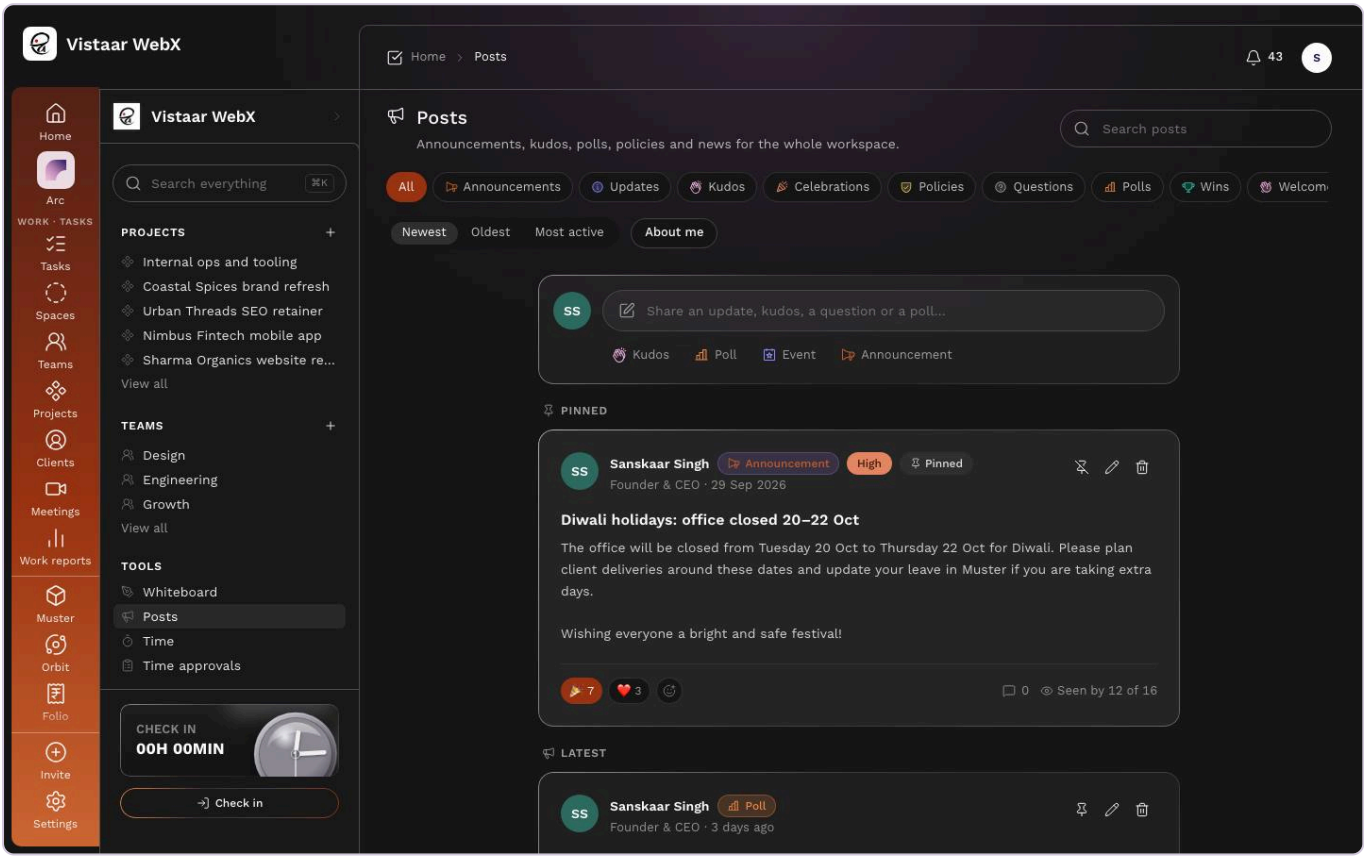
1. Open the composer and pick a **Type**.
2. Enter a **Title** and the **Message**. Add up to 4 images or GIFs, each up to 4 MB, and **Mention people** if you like.
3. Under **Who sees it and when**, choose the **Audience**: everyone, **Some roles**, chosen teams, departments or locations, or **Only mentioned people**.

4. Post now, or pick **At a set time** and a **Publish at (IST)** time up to 90 days ahead. Your scheduled posts are listed for you until they go out.

Filter the feed by type, by **Mentioned me** or "about me", and sort or search it. People react and reply; the author or a moderator can edit or remove a post, and announcers can **Pin to top**.

Posts: ten types, polls and scheduling

Open: **Work → Posts** Who: everyone; announcements and policies by moderators

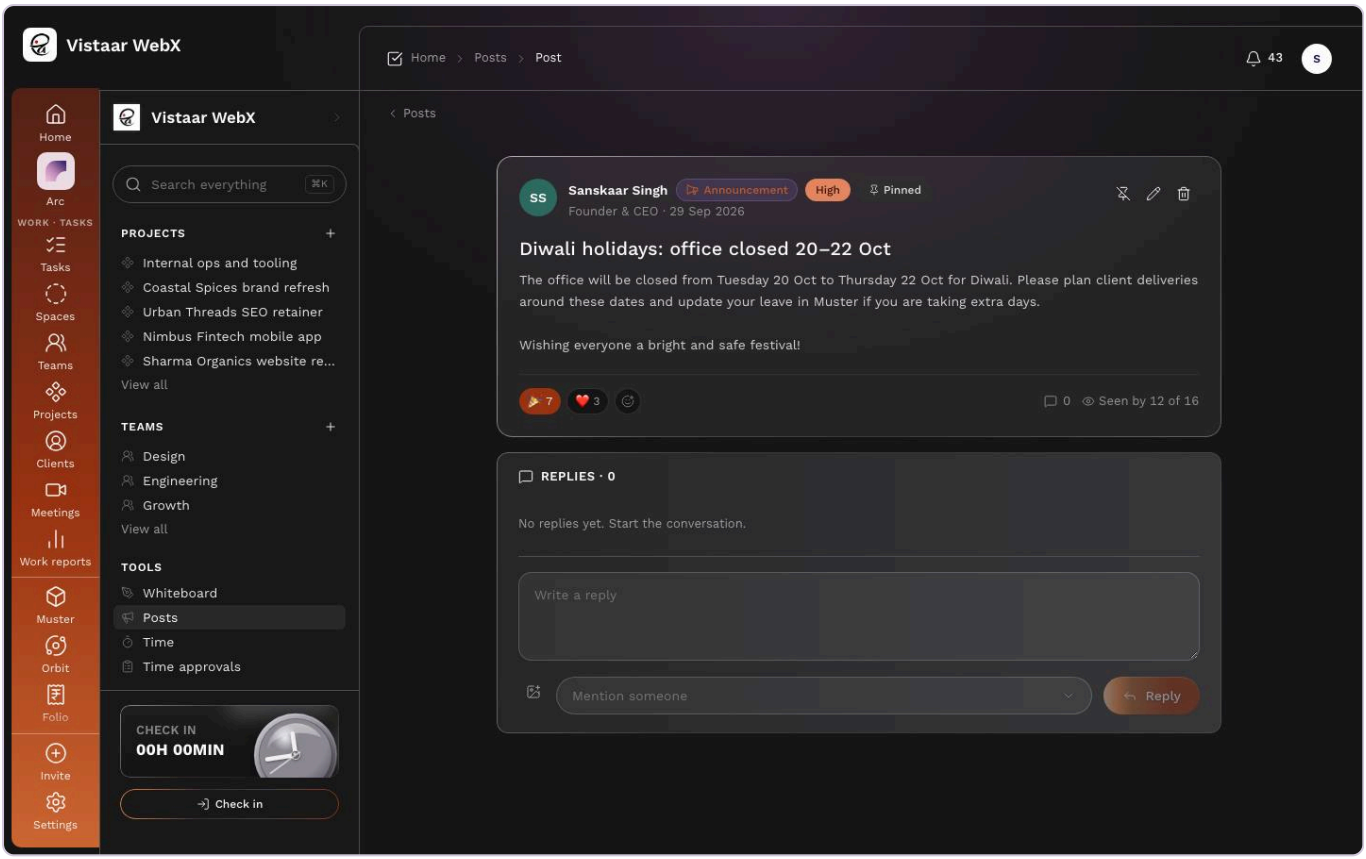


Filter the feed by type; pinned posts stay at the top.

- Types: Announcement, Update, Kudos, Celebration, Policy, Question, Poll, Win, Welcome and Event.
- **Policy** posts get an **I've read this** button; the author sees who has acknowledged and can remind the rest.
- **Kudos** tags people and also tells their managers. **Polls** have 2 to 8 options and can close on a date.
- Pick an audience (everyone, roles, teams, departments or locations) and, if you like, a time to publish.
- Birthdays, work anniversaries and welcomes can post by themselves; switch them off in Settings → Automations.
- Add up to 4 images or GIFs to a post, reply or task comment, each up to 4 MB.

A post in detail

Open: **Posts → click a post** `/app/work/posts/{id}` Who: everyone in the post's audience



Opening a post marks it read for you.

1. Read the post and add a reaction if you like.
2. Type in **Write a reply**, optionally pick someone in **Mention someone**, and click **Reply**. The author is notified.
3. The author and moderators can click the Seen by count to see who has read it and who has not.

PART 4

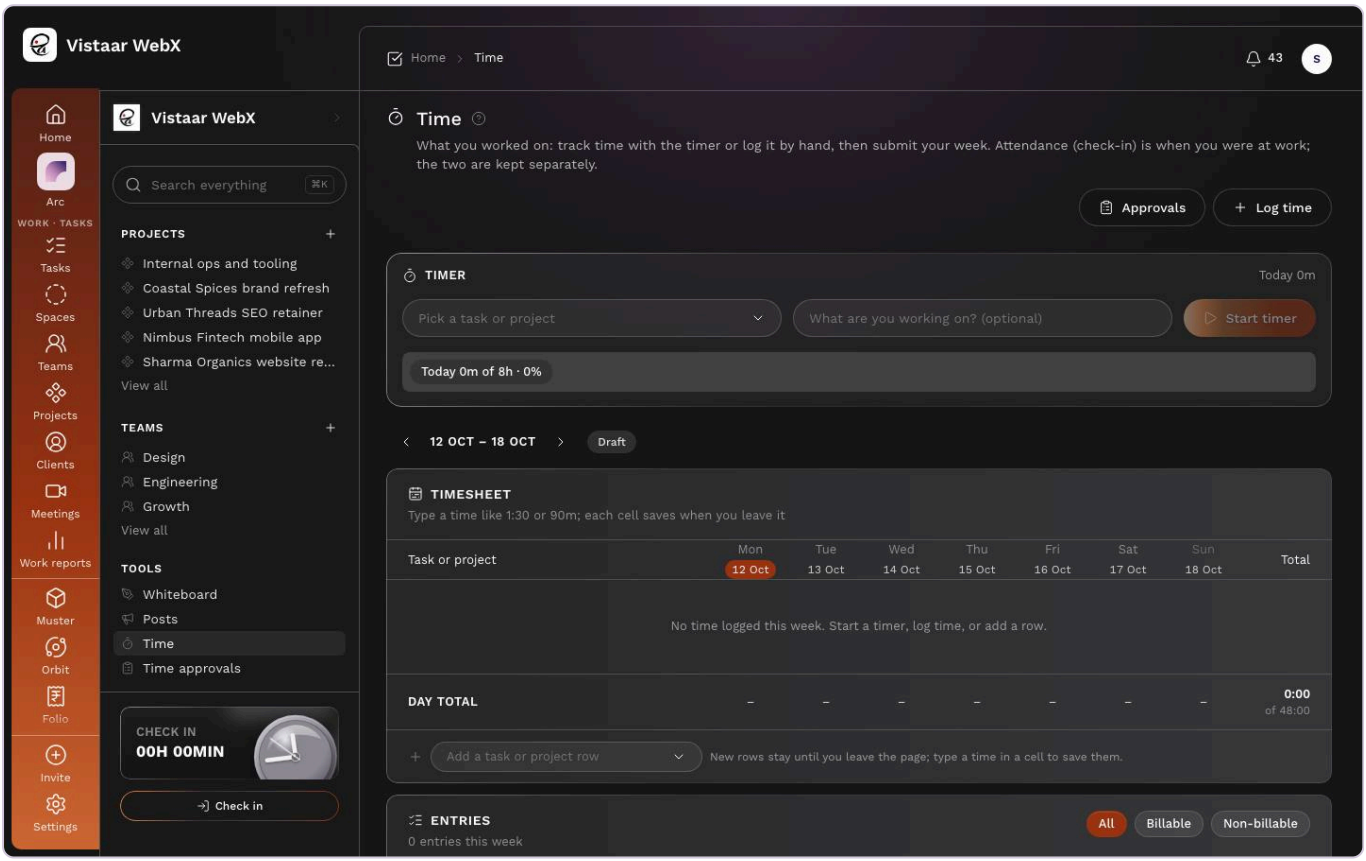
Time, whiteboards and reports

Timesheets and approvals, whiteboards and delivery reports.

Time tracking

Open: **Side panel → TOOLS → Time** `/app/work/time` Who: everyone

Track time with the timer or log it by hand against a task or project, then submit your week for approval.



The timer at the top, the week grid in the middle, entries below.

USE THE TIMER

1. In **TIMER**, choose a task or project in **Pick a task or project**.
2. Optionally type **What are you working on?**.
3. Click **Start timer**. The running time shows in the top bar on every page.
4. Stop it from the top bar or this card. The time is logged.

> **GOOD TO KNOW**
> Only one timer runs at a time. Starting a new one stops the last and logs it. A running timer cannot be edited or deleted; stop it first.

LOG TIME BY HAND

1. Click **Log time**.
2. Pick the **Task or project**, the **Date** and the **Time** (for example 1:30, 1h 30m or 90m).
3. Add a **Note**, set **Billable**, and click **Log time**.

TIP

In the weekly grid you can type a time straight into a day cell; it saves when you leave the cell. Use **Add a task or project row** to add a row.

SUBMIT YOUR WEEK

1. Check the **DAY TOTAL** row against the expected hours (8 hours per working day).
2. Click **Submit week** and confirm. Your approver is notified.

GOOD TO KNOW

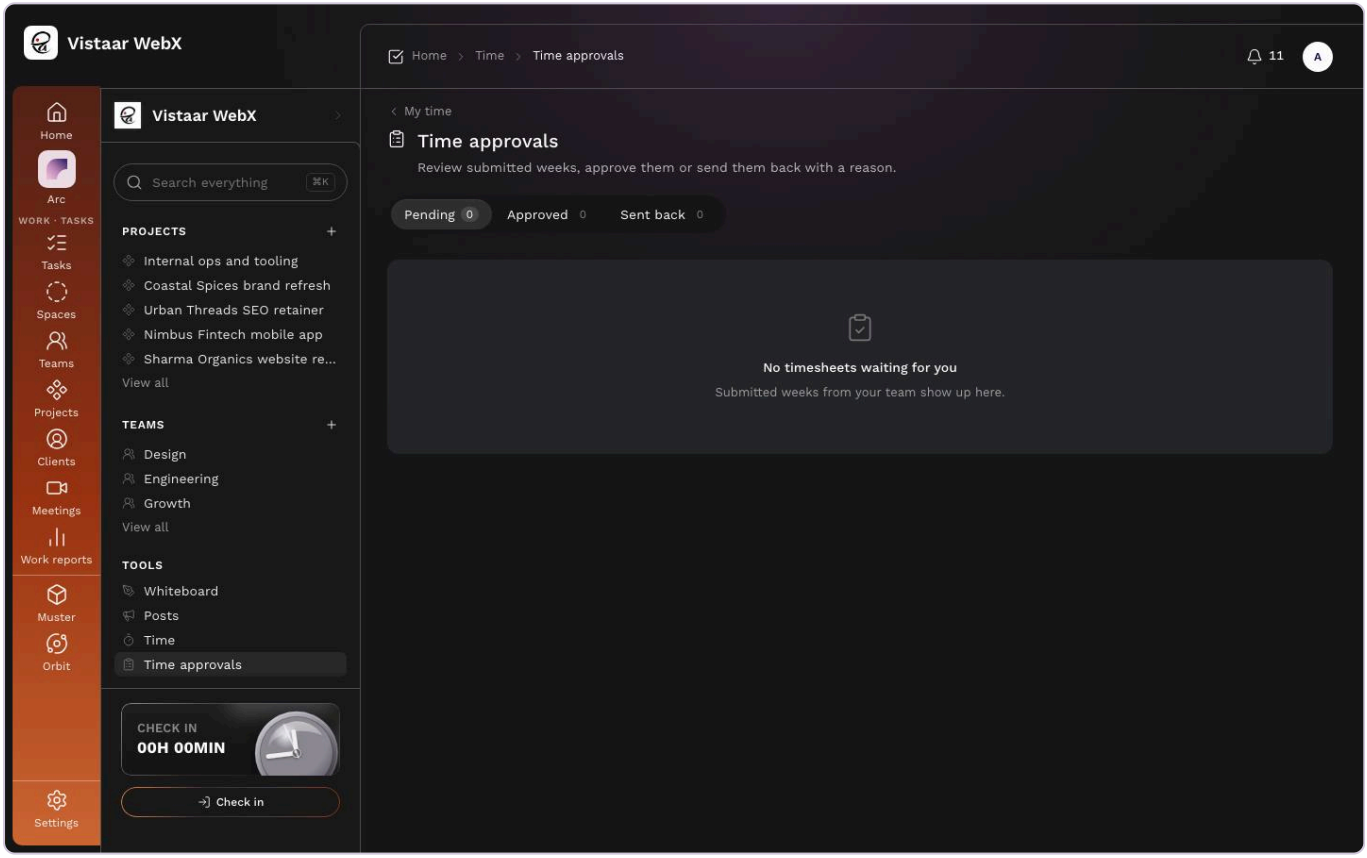
Once submitted, the week is locked. If your manager sends it back, the reason shows on the week and you can edit and submit again. You cannot submit an empty week.

Time approvals

Open: **Side panel → TOOLS → Time approvals** `/app/work/time/approvals`

Who: managers of the person, Managers, Admins, Owner

Review submitted weeks, approve them or send them back with a reason.



Seen as a Manager with nothing waiting.

1. Open **Pending**. Each row shows the person, the week, total and billable hours.
2. Click **Show days** to check the day-by-day entries.
3. Click **Approve**, or tick several weeks to approve them together.
4. To return a week, click **Send back**, write what needs fixing (at least 5 characters) and confirm.

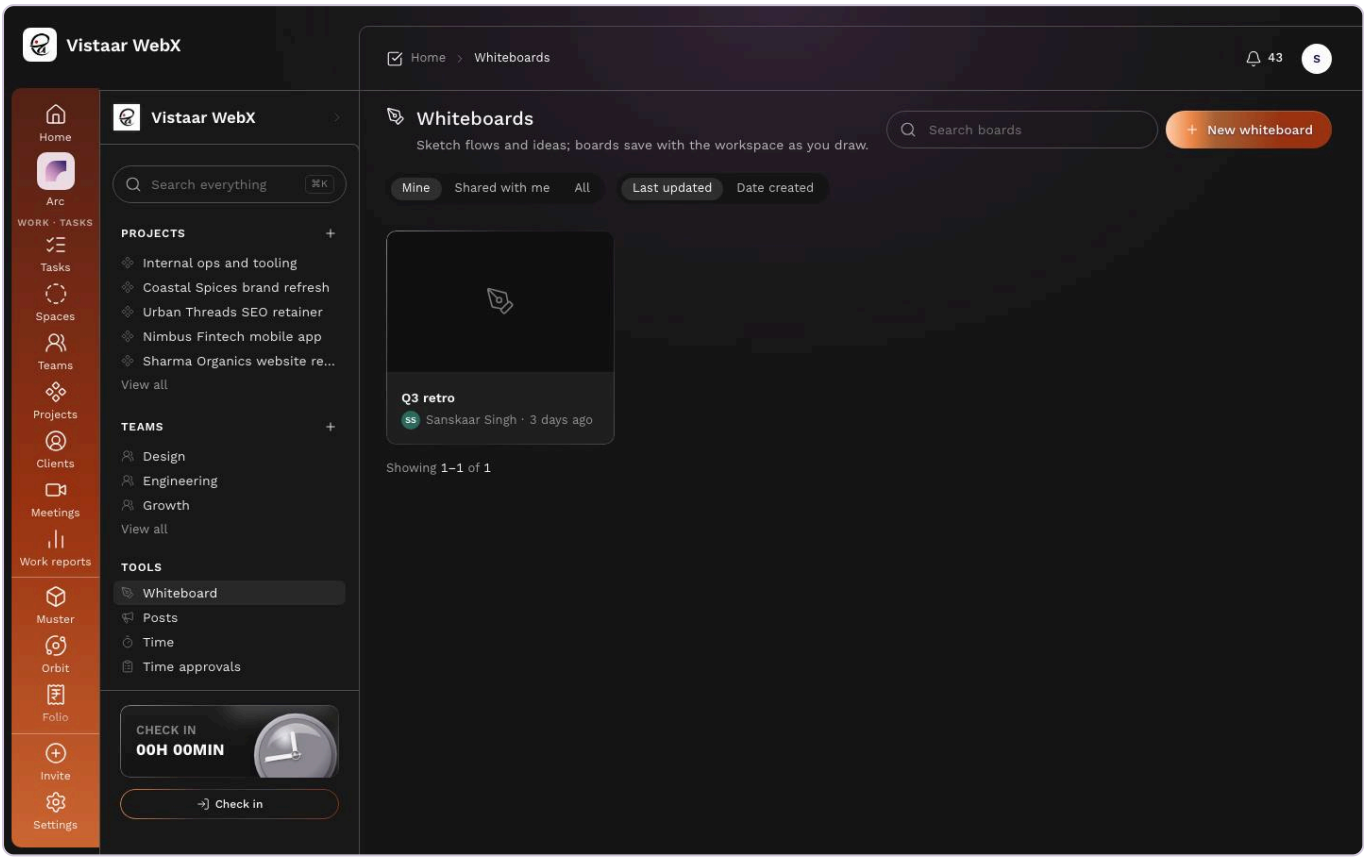
GOOD TO KNOW

A week goes to the person's manager; Owners, Admins and Managers can also approve. Nobody can approve their own timesheet.

Whiteboards

Open: **Side panel → TOOLS → Whiteboard** `/app/work/whiteboards` Who: everyone

Sketch flows and ideas. Boards save to the workspace as you draw.

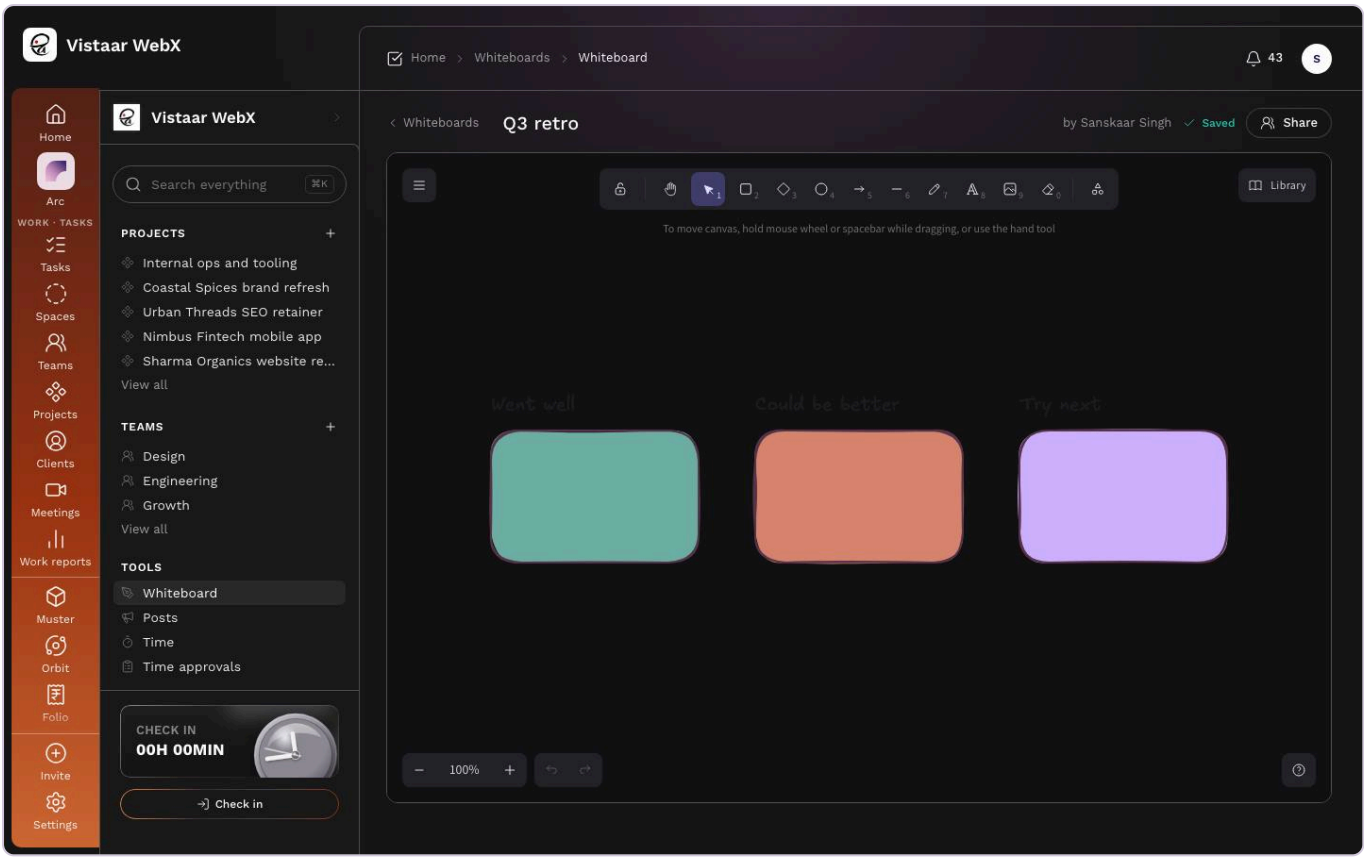


Your boards, with tabs for boards shared with you.

1. Click **New whiteboard**. It opens as "Untitled whiteboard".
2. Click the title to rename it.
3. From a card's menu: **Rename**, **Share**, **Duplicate** or **Delete**.

Drawing on a whiteboard

Open: **Whiteboards → click a board** `/app/work/whiteboards/{id}` Who: owner and people it is shared with



The status next to **Share** reads Saved, Saving… or Unsaved changes.

- The toolbar has select, hand (move the canvas), shapes, arrows, lines, pen, text, image and eraser. Zoom and undo are at the bottom left.
- Click **Share**, pick people and click **Save access**. Shared people can edit.

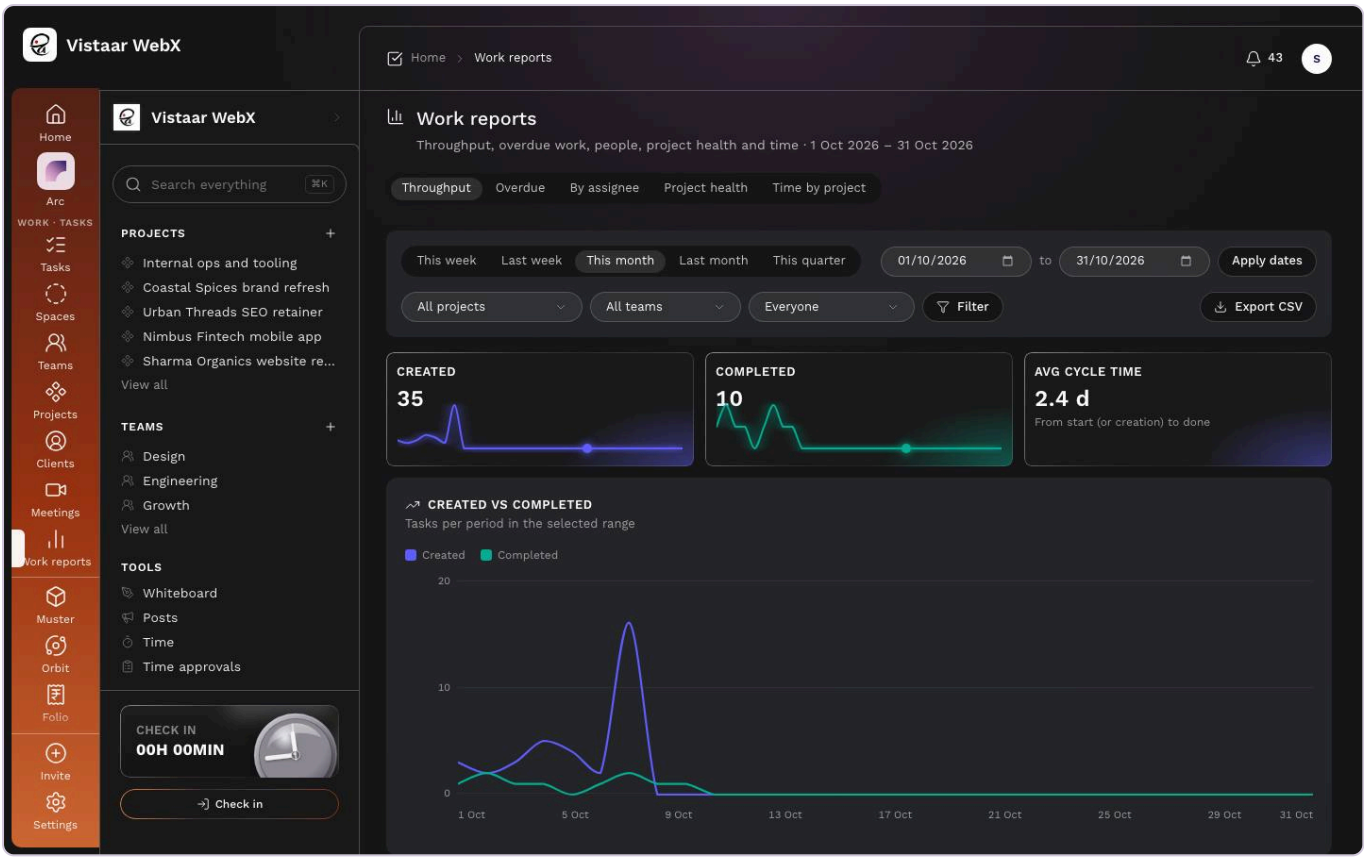
> **GOOD TO KNOW**
> One person should edit at a time. If someone else saved first, Flowbit says the board changed elsewhere; click **Reload** to see the latest. Very large boards with many images cannot be saved.

Work reports

Open: **Rail → Reports** `/app/work/reports`

Who: everyone sees their own scope; Managers, Finance and above see all

Throughput, overdue work, people, project health and time for a date range.



Pick a period, narrow by project, team or person, then export.

RUN A REPORT

1. Pick a tab.
2. Choose **This week**, **Last week**, **This month**, **Last month** or **This quarter**, or type dates and click **Apply dates**.
3. Narrow by project, team or person, then **Filter**.
4. Click **Export CSV** to download the section.

TAB	WHAT IT SHOWS
Throughput	Tasks created and completed per day, and average cycle time (from start, or creation, to done).
Overdue	Open tasks past due today, by age (1–3, 4–7, 8–14, 15+ days), assignee and project. Oldest first.
By assignee	Per person: open, completed, overdue, on-time %, average cycle, logged hours and estimate variance.
Project health	Every active project's lead, status, health, completion, open, overdue, blocked, schedule and logged time.
Time by project	Billable and non-billable hours per project and the people who logged most. Switch to **Only approved time** if needed.

Personal tasks are never counted.

PART 5

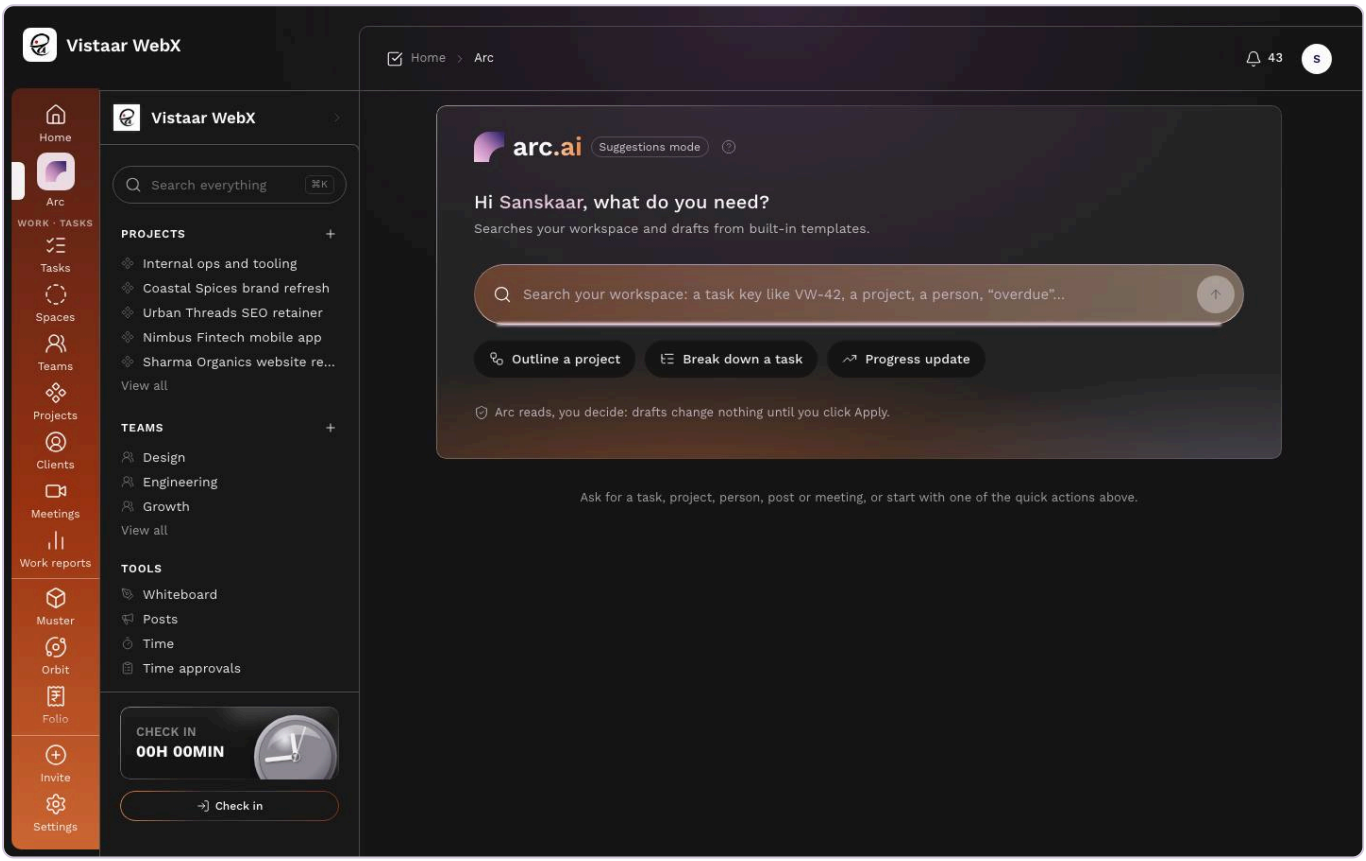
Arc and the client portal

The AI assistant, and sharing work with your clients.

Arc assistant

Open: **Rail → Arc** `/app/arc` Who: everyone

Arc searches your workspace and drafts plans and updates for you. **AI reads, people decide**: Arc never changes anything on its own. Every draft waits for you to click **Apply**.



"Arc reads, you decide: drafts change nothing until you click Apply."

SEARCH THE WORKSPACE

Type a task key like VW-42, a project, a person, or a word such as "overdue", and press Enter. Results are grouped into Tasks, Projects, Clients, People, Posts and Meetings, and only include what you are allowed to see. An exact task key opens the task.

OUTLINE A PROJECT

1. Click **Outline a project**.
2. Enter a **Project name** (or tick **Add to an existing project**), a **Goal in one line** and a **Start date**.
3. Click **Draft outline**. Arc proposes milestones with tasks, estimates and priorities.
4. Edit, remove or **Add task** rows as you like.
5. Click **Apply** to create them, or **Discard**.

BREAK DOWN A TASK

1. Click **Break down a task** and pick an open task.

2. Click **Suggest subtasks**.
3. Edit the suggestions and click **Apply** to add them as subtasks.

PROGRESS UPDATE

1. Click **Progress update**, choose the **Period** (This week or Last week) and what it is **About** (My work, a project or a team).
2. Click **Write update**. Arc writes it from real data: tasks completed, overdue, blocked, time logged and what is due next.
3. Click **Copy**, or **Post as update** to share it in Posts.

> **GOOD TO KNOW**
> Each draft says whether it was drafted by Claude or built from a template. If the AI service is not set up or does not answer, Arc uses its built-in templates. The numbers always come from your workspace. **Clear history** removes your past Arc requests.

Arc with real AI

Open: **Rail → Arc** Usage: **Settings → Integrations → Arc (AI)**

When your Flowbit server has an AI key, Arc drafts project outlines and task breakdowns and rewrites progress updates with Claude. Each plan has a number of AI requests a month (none on Free, 50 on a trial and 500 on paid plans by default). Past the limit, or without a key, Arc uses its built-in templates. Arc only drafts: nothing changes until someone clicks **Apply**, and salary, bank and PAN details are never sent to the AI.

Client portal

Turn on: **Clients → a client → Contacts → Client portal** Client's link: `/portal/your-workspace`
Who: owners, admins and people who manage clients

Give a client their own sign-in to see their projects, approve work and pay invoices, without a Flowbit seat. It is part of Suite, comes with the client portal add-on, and is on during the 15-day trial. The Free plan does not include it, or any other paid add-on (custom domains, Meetings AI).

1. Open the client, go to **Contacts**, switch the **Client portal** on and **Invite** the people at the client who should see it.
2. In a project's **Settings**, switch the **Client portal** card on to share that project.
3. On a task, tick **Client can see this**, or click **Send for approval** to ask the client to approve it (the task becomes visible to them).

Clients sign in with a six-digit code sent to their email; there is no password. They see only their own company: shared projects with status, health, progress and milestones, the tasks you made visible, approvals (approve or ask for changes, with a comment), invoices and quotes with Pay now, their statement, and files on shared projects and tasks. Their answers are logged on the task as "name (client)" and you are notified.

> **GOOD TO KNOW**
> The portal carries your logo, name and brand colour, and never opens the rest of Flowbit. Removing a contact signs them out for good.

PART 6

Questions people ask

Short answers from the Flowbit FAQ. The full list is at useflowbit.com/faq.

How do I create and manage tasks?

Open Tasks, type a title and press Enter. Switch between List, Board (drag across To do, In progress, In review, Blocked and Done) and Calendar. Filter by assignee, project, priority or due date, save views, and use bulk actions. A task holds subtasks, a checklist, files, comments with @mentions and its full history.

Can I add tasks in plain words, or in Hinglish?

Yes. Quick add reads dates, times, people, projects and priority as you type, in English or Hinglish: “kal 5 baje @vikram #design homepage banner p2” becomes a task for Vikram in Design, due tomorrow at 5 pm, high priority. What it understood shows as chips; click X on one to keep the word as text.

Can I open a task without losing my place in the list?

Yes. Clicking a task in a list, board, calendar, Home or the bell opens it in a side panel. J and K move to the next or previous task, E edits the title, M assigns it to you and Esc closes it. You can also link tasks as Blocked by or Related, and a task waiting on another is flagged.

Can I use Work just for my own tasks?

Yes. Choose the personal task workspace when you create it: your tasks, reminders, notes and calendar events, with no project setup. You can switch on the project mode any time.

What is the difference between spaces and projects?

Spaces are folders for ongoing work, like Marketing or Clients, with folders and lists of tasks inside. Projects are for work with a goal and a deadline: milestones, members, files, and a health score worked out from the tasks themselves, so overdue and blocked work pulls it down.

How do meetings turn into tasks?

Schedule a meeting with attendees, an agenda and a link; people RSVP inside Flowbit and get a calendar invite by email. In the meeting, write action items with an owner and a due date, then click Create task for one or all of them. Each becomes a real, tracked task.

Can Flowbit record meetings and write the minutes?

With the Meetings AI add-on (and during the 15-day trial), yes. It is not on the Free plan. Upload a recording, or send a notetaker to a Meet, Zoom or Teams call that announces itself. Flowbit transcribes it, including Hindi and English mixed, and drafts notes, decisions and action items for you to check before they become tasks.

What can I post on the Posts board?

Ten types: Announcement, Update, Kudos, Celebration, Policy, Question, Poll, Win, Welcome and Event. Policies collect “I’ve read this” from each person, kudos tell the person’s manager, polls can be anonymous with a close date, and any post can be scheduled and aimed at chosen roles, teams, departments or locations. Add up to 4 images or GIFs.

How do I see who is overloaded?

Open a team in Teams. Its Members tab shows each person’s workload this week, open and late tasks, and whether they are checked in, on a break, on leave or offline. Assigning work to someone on approved leave shows a warning first.

How do I track time and submit a timesheet?

Start the timer on a task or project; it runs on the server, so closing the tab does not stop it. Or log time by hand, or type it into the weekly timesheet. Submit the week and your manager approves it in Time approvals, or with the button in the email (it works once, for 7 days, for whoever has the email).

Are there whiteboards?

Yes. An infinite canvas for flows, brainstorms and retros, with shapes, arrows, a pen, text and images. Boards save as you work, and Flowbit warns you if someone else changed the same board so nobody overwrites anyone.

What reports does Work have?

Throughput, overdue work by age, tasks by assignee, project health and time by project, for any date range and filtered by project, team or person. Every report exports to CSV.

Do clients or guests need a seat?

There are no guest accounts: everyone who signs in to Flowbit counts as a user. Clients use the client portal instead, which needs no seat.

Can my clients see their projects and approve work?

Yes, with the client portal (in Suite, as an add-on, and during the 15-day trial; not on the Free plan). Invite people at the client; they sign in with an emailed code and see only their shared projects, the tasks you make visible, approvals, invoices and quotes with Pay now, their statement and shared files.

Does Work have Gantt charts?

Not yet. Projects have milestones with dates and owners, a progress ring and a health score, and tasks have a calendar view.