

# Vaiz Features: What Teams Can Build With It

Explore Vaiz features including boards, tasks, documents, Gantt charts, milestones, automation, dashboards, teams, AI, integrations, and imports.

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**TL;DR** Vaiz bundles eight feature areas into one workspace: projects and access control, boards and tasks, documents with 60+ block types, Gantt charts and milestones, when-then automation, dashboards, an AI assistant on Premium, and a small but well-chosen set of integrations including Slack, Zapier, GitHub, GitLab, webhooks, a Python SDK, and MCP support for Claude and Cursor. The vendor positions it as a tool to replace separate task, docs, and reporting subscriptions. Free covers 10 users, 2 GB, and 100 automations a month; AI lives on Premium (\$9/user annual). All facts verified against vaiz.com on May 20, 2026. For execution-heavy teams the value is consolidation; for knowledge-heavy teams Notion still wins on docs depth. The roadmap adds an AI Manager in Q1-Q2 2026 and SOC 2 in Q3-Q4 2026. Treat this page as a feature-by-feature evaluation framework rather than a hands-on benchmark.

## Project and Workspace Structure

**Vaiz organizes work as spaces, projects, and boards, with access control set at the project level and a full activity log captured under Events.**

The hierarchy is intentionally shallow: spaces group projects, projects contain boards and documents, and access permissions attach to projects. The activity log called Events captures every meaningful change — who created what, when a status moved, when a doc was edited — and feeds dashboards and the workspace search.

### Spaces, projects, and boards

Three levels, easy to explain to non-technical teammates. Three to five columns covers most workflows; custom fields stay scarce so the form remains scannable.

### Access control by project

Restrict client work or sensitive ops to a subset of users. Set roles at invite time and review access quarterly; loose permissions are the most expensive thing to retrofit.

### Activity history and events

Full timeline of project changes feeds dashboards and audit views. Verify the current capability against vaiz.com before relying on it for a critical workflow.

- **Members and groups** — manage by role and group, not just per-user.

Workspace structure is the single most important setup decision; revisit it after the first month of real use.

*Start with one space per team or client; everything else flows from that decision.*

## Boards and Task Management

**Boards support Kanban, List, Gantt, and Milestones views over the same underlying tasks. Cards expose custom fields, subtasks, WIP limits, owners, due dates, and priorities.**

Boards are the daily home for execution work. Switching from Kanban to Gantt does not move the tasks — the same underlying records render differently. Custom fields let teams attach effort estimates, customer references, or product tags without bending titles or descriptions.

### **Kanban, List, Gantt, and Milestones views**

Same tasks, four perspectives. Switching to Gantt does not duplicate tasks — the same records render as bars on a timeline.

### **Custom fields and task details**

Text, number, date, dropdown, and link types. The AI assistant ships on Premium; MCP support extends workspace data to Claude Desktop and Cursor under existing permissions.

### **WIP limits and saved filters**

Keep boards from getting clogged. Storage and automation caps quietly push teams into higher tiers, so budget for the upgrade before usage forces it.

- **Subtasks and dependencies** — break large tasks down and mark blocking relationships.

For most teams, Kanban for daily flow and List for triage cover 80% of board use; Gantt comes in during planning weeks.

*Treat boards as a multi-view surface; pick the right view for each meeting rather than maintaining duplicates.*

## Documents and Knowledge Work

**The Vaiz document editor advertises 60+ block types — checklists, data grids, code, embeds, media, and more — and documents can sit beside project boards so context lives next to execution.**

Documents are first-class citizens in Vaiz, not an afterthought. A project specification, a meeting note, or a customer brief lives in the same workspace as the tasks it generates. Comments and mentions work in documents the same way they work on tasks.

### **Docs beside tasks and projects**

Decision and execution context share a workspace. Three to five columns covers most workflows; custom fields stay scarce so the form remains scannable.

### **Embedded tools and file context**

Figma, Miro, Excalidraw, YouTube, Vimeo, iFrame, Swagger, GraphQL Editor, Mermaid,

CodeSandbox. Docs sit beside tasks in the same workspace, so a spec page and the issues that implement it share one navigation surface.

## Linking decisions to execution

Reference tasks inside docs and reference docs from tasks. Verify the current capability against vaiz.com before relying on it for a critical workflow.

- **Realtime collaboration** — comments and mentions inside documents.

The document layer is one of the strongest reasons to consider Vaiz over a project tool plus Confluence or Notion.

*Use docs as the spec; let the board be the execution. Linking the two is the unlock.*

## Gantt Charts and Milestones

**Gantt view shows timelines and dependencies for the same tasks living on the board. Milestones group multiple tasks into a goal or epic that can be tracked separately.**

Gantt and milestones cover the planning side of the workflow. Move a bar in Gantt and the underlying task updates everywhere. Milestones bundle tasks into goals so dashboards can chart progress at a higher level than individual cards.

### Timelines and dependencies

Drag-and-drop scheduling with blocking relationships. Switching to Gantt does not duplicate tasks — the same records render as bars on a timeline.

### Milestone grouping for goals

Track delivery against epics rather than per-task. Switching to Gantt does not duplicate tasks — the same records render as bars on a timeline.

### Planning complexity to test

Verify multi-project rollups and resource conflicts before committing if those are critical. Verify the current numbers on vaiz.com before quoting them to procurement; SaaS list prices drift.

- **Switching views** — toggle between Kanban and Gantt without losing context.

Gantt depth is solid for most teams; large-program planning with critical-path requirements should test it against a real project plan first.

*Plan in Gantt, execute in Kanban; milestones tie the two together.*

## Automation and Workflow Rules

**Automation is exposed as when-then rules attached to boards. Common patterns include auto-assigning new tasks, moving tasks between statuses, notifying on deadlines, and archiving completed work.**

Vaiz automation is built around a familiar pattern: when something happens, then do

something else. Free is capped at 100 automation runs per month; Pro and Premium remove the cap. Pair automations with templates to make repeated processes click-and-go.

### **When-then automation setup**

Choose a trigger, optional conditions, and an action. Start with one painful chore and watch the rule for a week before adding another; rule sprawl is the silent killer.

### **Auto-assign, move, archive, and notify**

The most useful patterns for small teams. Verify the current capability against vaiz.com before relying on it for a critical workflow.

### **Automation limits by plan**

Free 100/month; Pro and Premium unlimited. Verify the current numbers on vaiz.com before quoting them to procurement; SaaS list prices drift.

- **External triggers** — Zapier and webhooks extend the catalogue to thousands of apps.

Start with one automation that removes a real chore — Slack alert on overdue, auto-assign new bugs to the on-call engineer — before building a wall of rules.

*Automate one painful chore first; rules without a problem to solve add noise, not value.*

## **Dashboards and Reporting**

**Dashboards surface progress, blockers, and metrics across projects in one place. Reports and CSV exports back them up for stakeholders who prefer a flat view.**

Dashboards are aimed at managers and stakeholders rather than daily contributors. Teams can build a status dashboard for leadership, a workload view for team leads, and a delivery view for clients without rebuilding the same data three times.

### **Progress and metrics in one place**

Cross-project rollups. Tie every widget to a recurring decision; charts without a decision attached become decoration.

### **Reports, charts, and CSV export checks**

Verify chart types and export coverage against your reporting needs. Tie every widget to a recurring decision; charts without a decision attached become decoration.

### **Cross-project visibility**

See all overdue work across the workspace. Verify the current capability against vaiz.com before relying on it for a critical workflow.

- **AI-generated reports** — Premium-tier feature that drafts written summaries.

Avoid dashboard sprawl: three or four high-signal widgets beat fifteen vanity charts.

*Build dashboards around the decisions they support; everything else is noise.*

## AI Assistant and MCP

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**The Vaiz AI assistant ships on Premium and handles task breakdowns, document summaries, action extraction, and report drafting. MCP support lets Claude Desktop and Cursor connect to the workspace under existing permissions.**

The AI surface inside Vaiz has two parts: the built-in assistant on Premium, and the MCP layer that exposes workspace data to external AI tools. The roadmap adds an AI Manager in Q1-Q2 2026 for task creation, assignment, and reporting.

### Goal-to-task planning help

Break a goal into a first-pass task list. Verify the current numbers on vaiz.com before quoting them to procurement; SaaS list prices drift.

### Summaries and action extraction

Turn long docs and meeting notes into action items. Verify the current capability against vaiz.com before relying on it for a critical workflow.

### Claude and Cursor connection use cases

Read tasks, projects, and documents from external AI under workspace permissions. The AI assistant ships on Premium; MCP support extends workspace data to Claude Desktop and Cursor under existing permissions.

- **Plan availability** — built-in assistant on Premium; MCP support broader.

Always review AI output before executing. The roadmap is promising; today's AI is best treated as a fast first draft.

*Use AI for first drafts and summaries; keep humans on the decisions.*

## Integrations and Imports

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**Native integrations include Slack, Zapier (9,000+ apps), GitHub, GitLab, webhooks, and a Python SDK. Importers cover Trello, Jira, Asana, YouTrack, and Notion tasks today, with ClickUp, Monday, and Wrike on the roadmap.**

The integration list is deliberately short and high-quality. Most teams care about three things: their chat tool, their code host, and a way to wire up everything else. Slack and GitHub cover the first two; Zapier covers the long tail; the Python SDK and webhooks cover programmatic needs.

### Slack, Zapier, GitHub, API, and webhooks

The Zapier integration covers most apps that aren't native. Native connectors cover high-traffic apps; Zapier (advertised at 9,000+ apps) bridges the long tail.

### Importing from Asana, Jira, Trello, Notion, YouTrack

MCP support is the AI angle that distinguishes Vaiz from older incumbents. One-click importers cover Trello, Jira, Asana, YouTrack, and Notion (tasks today); plan a parallel run for one cycle before sunseting the old tool.

## Embedded Figma, Miro, Mermaid, and media

Importers are useful enough to plan the migration around them rather than rebuilding. The AI assistant ships on Premium; MCP support extends workspace data to Claude Desktop and Cursor under existing permissions.

Type	Available	Coming
Native	Slack, Zapier, GitHub, GitLab, Webhooks, Python SDK, MCP	Public API and SDK expansion (Q3–Q4 2026)
Imports	Trello, Jira, Asana, YouTrack, Notion tasks	ClickUp, Monday, Wrike
Embeds	Figma, Miro, Excalidraw, YouTube, Vimeo, iFrame, Swagger, GraphQL Editor, Mermaid, CodeSandbox	—

Teams that already standardize on Slack and GitHub will find Vaiz a comfortable fit.

*Use the importer; manual recreation of an existing project is rarely the right path.*

## FAQ

### What are the main Vaiz features?

Projects, events, teams, AI assistant, tasks, documents, Gantt charts, automation, dashboards, milestones, and Kanban boards with WIP limits, smart filters, and multiple views.

### Does Vaiz support Gantt charts?

Yes. Gantt is one of the supported board views, with timelines and dependencies on the same underlying tasks.

### Are Vaiz dashboards customizable?

Yes. Teams build dashboards from chart, list, and report widgets pointing at workspace data. AI-generated reports are a Premium feature.

### Can I import from Trello or Jira?

Yes. One-click importers exist for Trello, Jira, Asana, YouTrack, and Notion (tasks). ClickUp, Monday, and Wrike are listed as coming soon.

### Does Vaiz have an open API?

Webhooks and a Python SDK are available today. A broader public API and SDK expansion are on the roadmap for Q3–Q4 2026.

### Which Vaiz plan includes the AI assistant?

Premium. Pro and Free do not include the AI assistant, though MCP support for external AI tools is broader than the plan-gated assistant.

Full article: <https://tasktracker.best/vaiz-features>

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