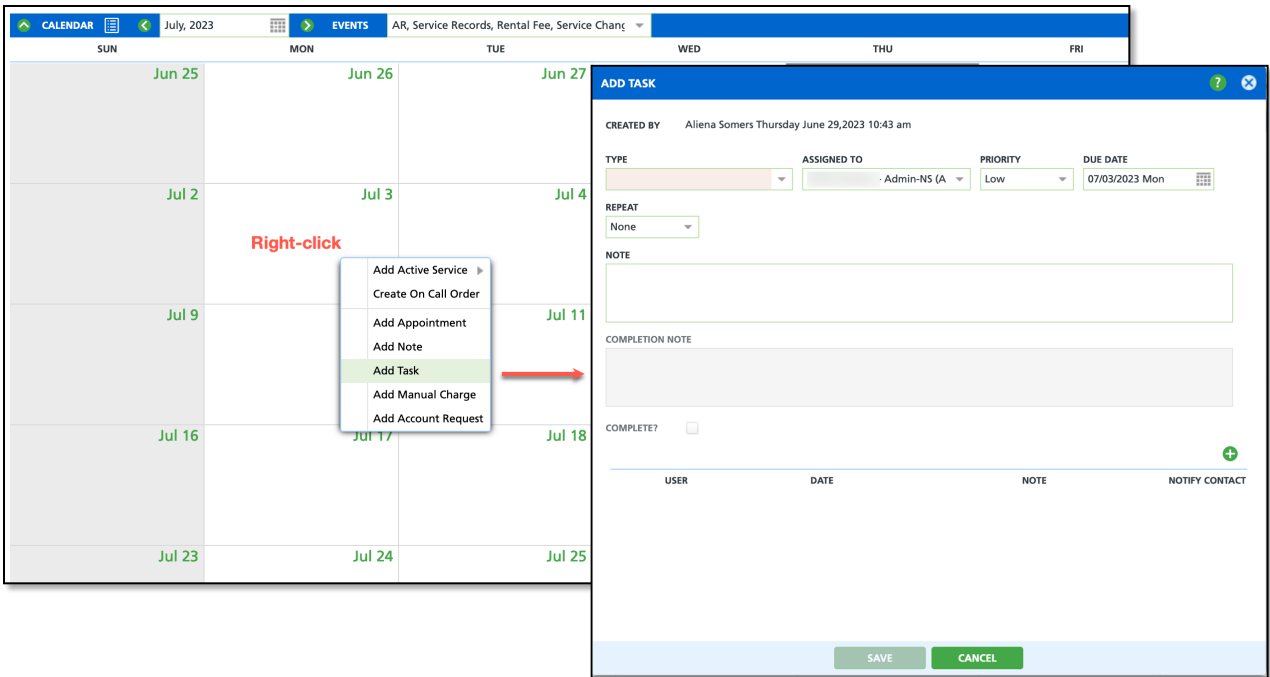


Add Task

Last Modified on 09/10/2024 9:31 am EDT

Pathway: [Accounts](#) > [Search](#) > [Accounts](#)

Tasks can be added to a customer's account for any reason where followup, further review, or something related to the successful operation of the account is needed. The Add Task tool allows users to create and assign tasks to themselves, or another user, and then review tasks by the user or the department they are assigned to.



Permissions

The following permissions apply to the Add Task feature:

Permission ID	Permission Name
5	View Account
6	View Site
27	Add Task
28	Edit Task For Self
29	Delete Task For Self
30	Edit Task For Others
31	Delete Task For Others

Field Descriptions

Field	Description
Type	Indicates what the task is about. Task type options are created in <i>Setup > Account > Task Type</i> .
Assigned To	Option to assign the task to another user. If user A assigns a task to user B, both user A and user B will see the task in the Tasks notification icon. <i>* Note: Users will receive a notification when a task has been assigned to them.</i>

Field	Description
Priority	Indicates the level of priority the task has been given. Options include: Low, Medium and High.
Due Date	Indicates the date by which the task should be completed.
Repeat	Option to set the task up on a recurring schedule. If this is a one-time task, leave 'None' selected.
Note	Additional space to add internal notes regarding the task.
Completion Note	Option to add any completion notes upon completion of the task.
Complete	Select the Complete check box only after the task is complete. Completed tasks are archived for 30 days and are accessible by selecting the Task icon and filtering the screen on 'Show Closed'.
Green '+' Icon	Select to add an additional note to the task.

Add a Task

1. Right-click on the **calendar date** the task applies.
2. Select **'Add Task'** from the list of options that are displayed.
3. From the Add Task popup editor, complete all necessary fields.
 - **IMPORTANT:** do not enter completion notes, or select the 'Complete' check box until **AFTER** the task is complete.
4. Select **Save** when finished.

Add a Timestamped Note to a Task

Add a note to any task by selecting the **green '+'** icon. Upon save, a record of the user and date/time they added the note is recorded.

COMPLETE?

→ +

USER	DATE	NOTE	NOTIFY CONTACT
Aliena Somers	Jul 28, 2022 2:17 am	Phone kept ringing and never went to voicemail.	<input type="checkbox"/>

SAVE
CANCEL
DELETE

Locations Tasks Display

Tasks display in the following locations until marked complete:

1. Tasks Column in the Home Screen

REQUESTS	TASKS	QUOTES/CONTRACTS	APPOINTMENTS
Cancellation: Price Polly Pie 2 Received - 15 days old	Aug 01 2024 Credit Request Wild Mountain	Food4Less A-New Business-Acquisition \$ 320.00	Jul 29 2024 2:00 pm Introduction
		Starstruck New Business - Required Below Max \$ 300.00	
		Polly Pie 2 New Business Vendor \$ 100.00	
		Pop Up Home A-New Business-Acquisition \$ 75.00	

2. Tasks Icon

TASK MANAGEMENT										
DIVISION	PRIORITY	TASKS	TYPE		SHOW ALL OPEN	PAST DUE	0	COUNT	2	Search
Medium	Open	QAWASTE	Wild Mountain	Credit Request	08/01/24	Aliena Somers	Aliena Somers			
Medium	Open	HOUSTON	CITY OF LIBERTY	Billing/AR question	07/25/24	Aliena Somers	Aliena Somers			

3. Pending Section of the Account

45597 Cascade Orthopedics				45597001 Osseo Clinic			
123 West Elm St Houston, TX 54020-4042	Active	HOUSTON	1 of 2	1111 Churchill St W Houston, TX 55082	Active	CORPL	
	DIVISION	HOUSTON	1 of 2	1111 Churchill St W Houston, TX 55082	Active	CORPL	
	ACCOUNT MGR	Aliena Somers				SOURCE	Acquis
	CLASS	COMMERCIAL					
	BILL GROUP	HOU-MANUAL INVOICES					
	CURRENT	1-30	31-60	61-90	91-120	120+	TOTAL
	187.33	0.00	0.00	0.00	0.00	0.00	187.33
HIGHLIGHTS				PENDING			
	4143	Confirm appointment	Aliena Somers	08/02/2022	Email appointment reminder for next week and send invite.		
	1016	Follow Up	Aliena Somers	08/09/2022 10:00 am	Discuss adding new site that was recently purchased. Last cal		
	1195	Vacation Hold Services	Alexis Garza	05/20/2022 1:29 pm			