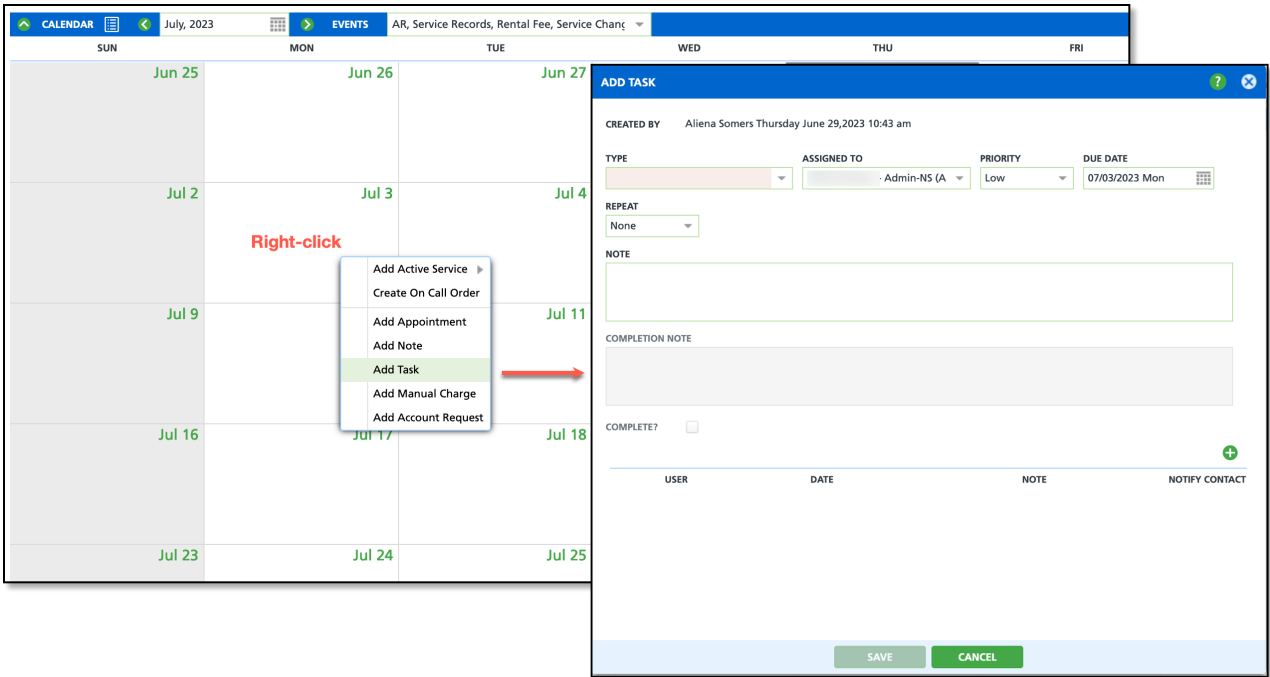


Add Task

Last Modified on 11/21/2024 10:32 am PST

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

Tasks can be added to a customer's account whenever follow-up, further review, or any actions necessary for the successful management of the account. The Add Task tool enables users to create and assign tasks to themselves or others, and allows for task reviews based on the assigned user or department.



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>
Priority	Indicates the level of priority the task has been given. Options include: Low, Medium and High.

Field	Description
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, or select it from the Account Menu list of options.
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.

The screenshot shows a popup editor for adding a task. At the top left, there is a 'COMPLETE?' checkbox which is currently unchecked. In the top right corner, a red arrow points to a green '+' icon. Below this is a table with the following data:

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

At the bottom of the popup, there are three buttons: 'SAVE', 'CANCEL', and 'DELETE'.

Locations Tasks Display

Tasks display in the following locations until marked complete:

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-Acquistion \$ 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-Acquistion \$ 75.00	

Tasks Management (Tasks Icon)

TASK MANAGEMENT										
DIVISION	PRIORITY	TASKS	TYPE							
All	All	My Tasks	All		SHOW ALL OPEN		PAST DUE 0		COUNT 2	
PRIORITY	STATUS	DIVISION	NAME	TYPE	DUE DATE	CREATED BY	ASSIGNED TO	NOTE	ATTACHMENT	
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			

Pending Section of the Account

45597 Cascade Orthopedics				45597001 Osseo Clinic				
123 West Elm St Houston, TX 54020-4042				1111 Churchill St W Houston, TX 55082				
Active				Active				
DIVISION		HOUSTON		1 of 2		CORPL		
ACCOUNT MGR		Aliena Somers				CORPL		
CLASS		COMMERCIAL				SALES REP		
BILL GROUP		HOU-MANUAL INVOICES				Acquis		
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 call
1195 Vacation Hold Services				Alexis Garza		05/20/2022 1:29 pm		