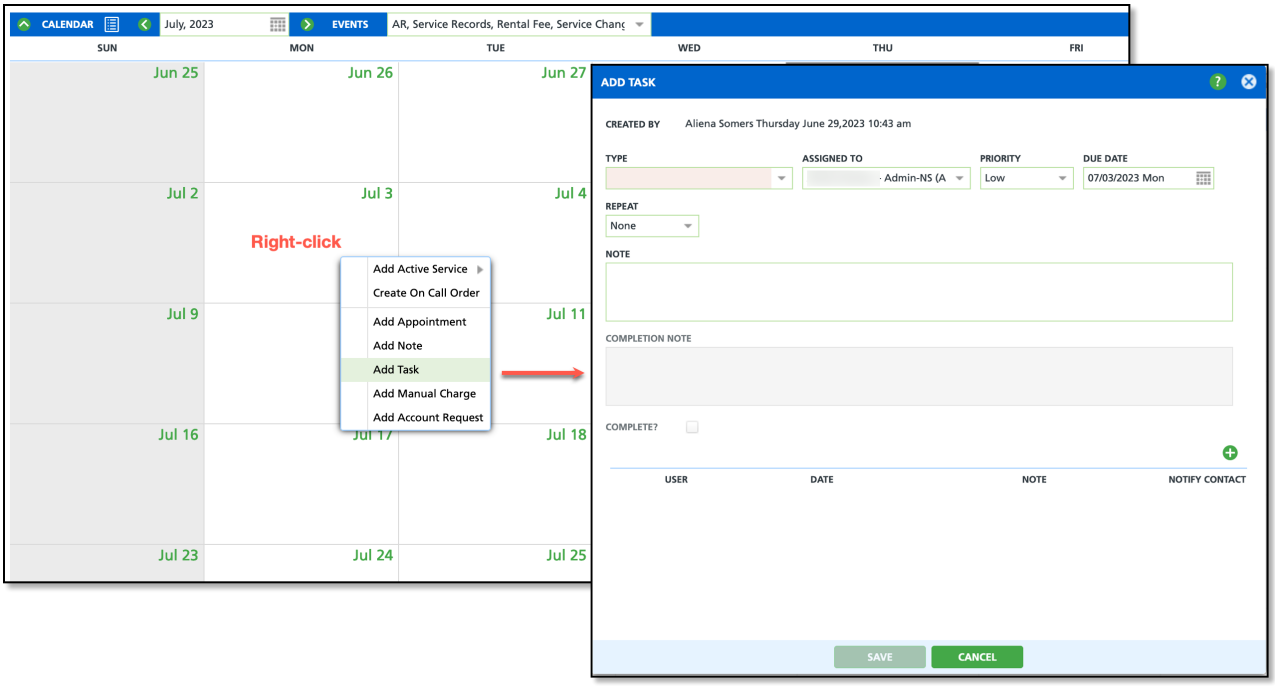
Add Task

Last Modified on 06/25/2026 6:09 am PDT

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 *Setup > Account > Task Type.*
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. * *Note: Users will receive a notification when a task has been assigned to them.*

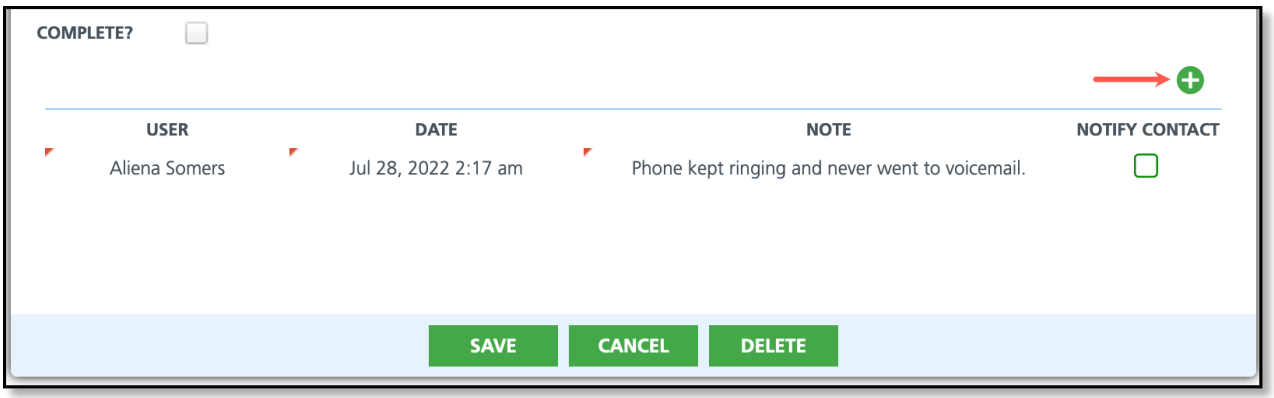
Field	Description
Priority	Indicates the level of priority the task has been given. Options include: Low, Medium and High.
Due Date	Indicates the date by which the task should be completed.
Repeat	Option to set the task up on a recurring schedule. If this is a one-time task, leave 'None' selected.
Note	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, 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

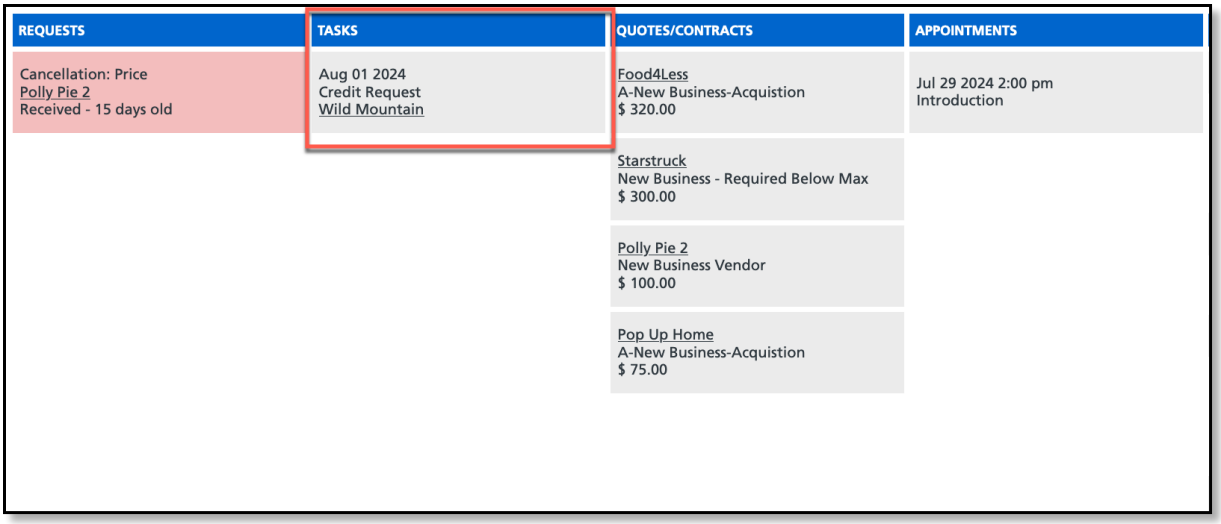
Add a note to any task by selecting the **green '+'** icon. Upon save, a record of the user and date/time they added the note is recorded.



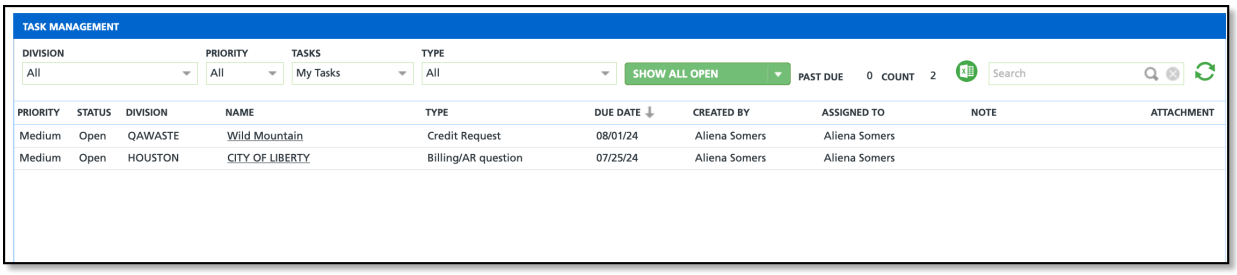
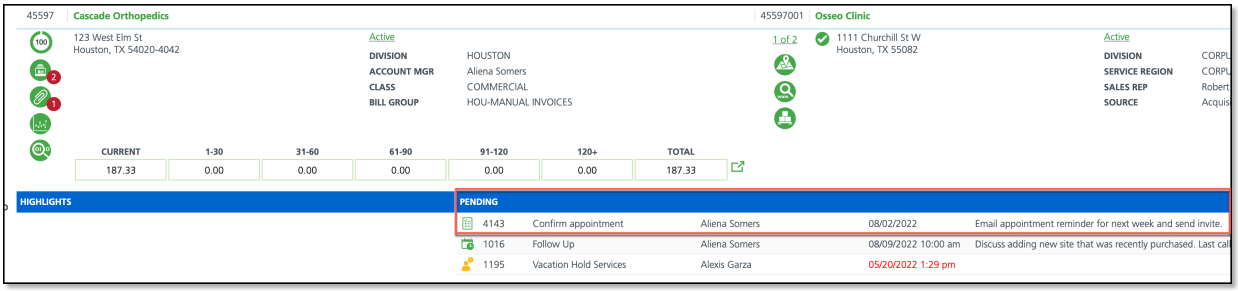
Locations Tasks Display

Tasks display in the following locations until marked complete:

Tasks Column in the Home Screen



Tasks Management (Tasks Icon)



Pending Section of the Account