Task Type Setup

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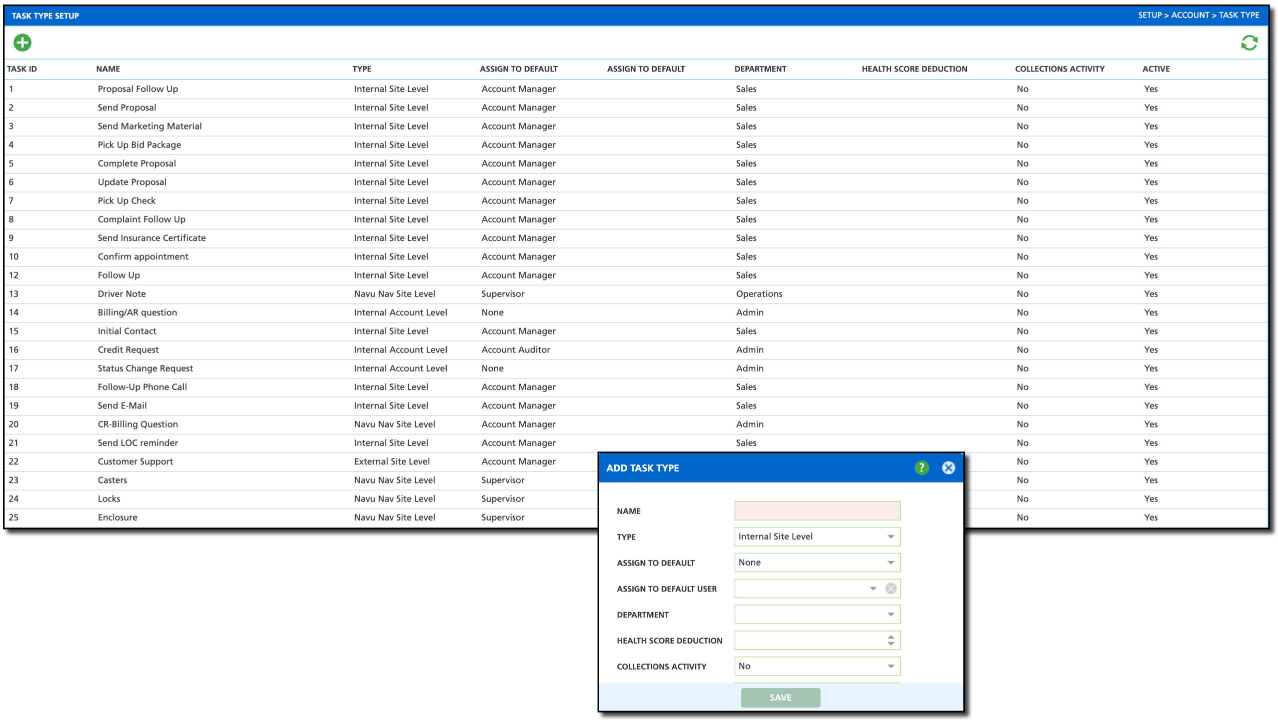
Pathway: *Setup > Account > Task Type*

The Task Type Setup feature allows users to generate a wide range of task types that can be chosen when adding a task to an account or site.


TASK TYPE SETUP

SETUP > ACCOUNT > TASK TYPE

TASK ID	NAME	TYPE	ASSIGN TO DEFAULT	ASSIGN TO DEFAULT	DEPARTMENT	HEALTH SCORE DEDUCTION	COLLECTIONS ACTIVITY	ACTIVE
1	Proposal Follow Up	Internal Site Level	Account Manager		Sales		No	Yes
2	Send Proposal	Internal Site Level	Account Manager		Sales		No	Yes
3	Send Marketing Material	Internal Site Level	Account Manager		Sales		No	Yes
4	Pick Up Bid Package	Internal Site Level	Account Manager		Sales		No	Yes
5	Complete Proposal	Internal Site Level	Account Manager		Sales		No	Yes
6	Update Proposal	Internal Site Level	Account Manager		Sales		No	Yes
7	Pick Up Check	Internal Site Level	Account Manager		Sales		No	Yes
8	Complaint Follow Up	Internal Site Level	Account Manager		Sales		No	Yes
9	Send Insurance Certificate	Internal Site Level	Account Manager		Sales		No	Yes
10	Confirm appointment	Internal Site Level	Account Manager		Sales		No	Yes
12	Follow Up	Internal Site Level	Account Manager		Sales		No	Yes
13	Driver Note	Navu Nav Site Level	Supervisor		Operations		No	Yes
14	Billing/AR question	Internal Account Level	None		Admin		No	Yes
15	Initial Contact	Internal Site Level	Account Manager		Sales		No	Yes
16	Credit Request	Internal Account Level	Account Auditor		Admin		No	Yes
17	Status Change Request	Internal Account Level	None		Admin		No	Yes
18	Follow-Up Phone Call	Internal Site Level	Account Manager		Sales		No	Yes
19	Send E-Mail	Internal Site Level	Account Manager		Sales		No	Yes
20	CR-Billing Question	Navu Nav Site Level	Account Manager		Admin		No	Yes
21	Send LOC reminder	Internal Site Level	Account Manager		Sales		No	Yes
22	Customer Support	External Site Level	Account Manager				No	Yes
23	Casters	Navu Nav Site Level	Supervisor				No	Yes
24	Locks	Navu Nav Site Level	Supervisor				No	Yes
25	Enclosure	Navu Nav Site Level	Supervisor				No	Yes

Field Descriptions

Fields	Descriptions
Name	The name of the task type that will display for selection when a task is created.
Type	Where the tasks will be listed for selection. • **Internal Site Level** - Site specific and only visible to the site for which it's created. • **External Site Level** - Currently not in use. • **Navu Nav Site Level** - Selectable from NavuNav for the driver to create task from their tablet. Task is then assigned back to the driver's route supervisor. • **Internal Account Level** - Account level task that is visible on all sites associated with the account. • **External Account Level** - Currently not in use.
Assign To Default	The user the task should be assigned to when it is created. This can be set to default a tasks assignment to a specific user, or a user type linked to an account.

Assign To Default User	The user this task should be assigned to.
Department	The department the task is for within the company.
Health Score Deduction	
Collections Activity	

Add Task Setup Steps

1. Click the **green +** to open the Add Task Type editor.
2. Complete the following required fields:
    - Enter a **Name** for the account request.
    - Select the **Type** to determine the location of the task for selection.
3. Complete additional fields based on your company's established procedures.
4. Click **Save** when finished.

Related Articles:

Add Task