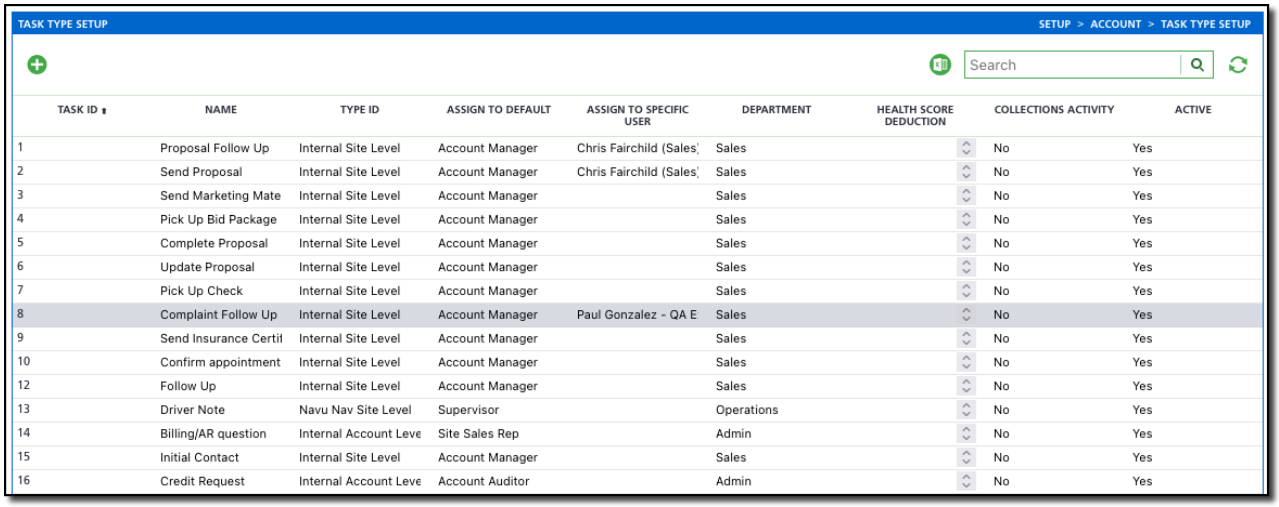
Task Type Setup

Last Modified on 10/09/2026 1:03 pm PDT

Pathway: *Setup > Account > Task Type*

Task Type Setup allows you to create and manage the task types available when adding a task to an account or site. Tasks can be created by a desktop user or by a driver in the NavuNav mobile app.



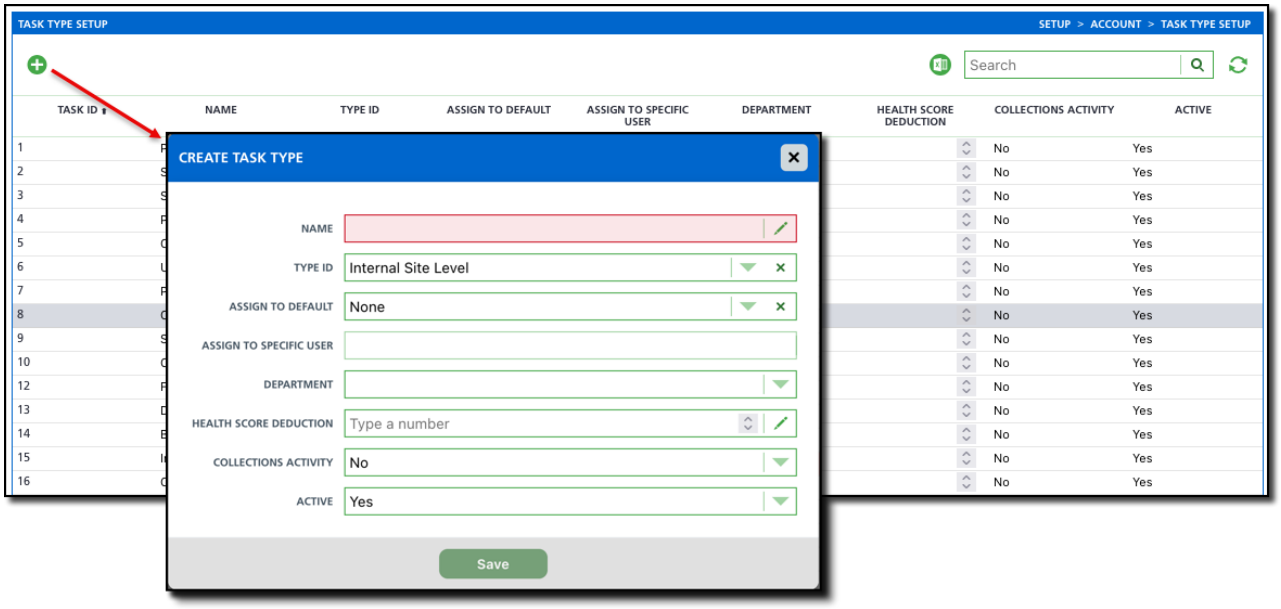
TASK ID	NAME	TYPE ID	ASSIGN TO DEFAULT	ASSIGN TO SPECIFIC USER	DEPARTMENT	HEALTH SCORE DEDUCTION	COLLECTIONS ACTIVITY	ACTIVE
1	Proposal Follow Up	Internal Site Level	Account Manager	Chris Fairchild (Sales)	Sales		No	Yes
2	Send Proposal	Internal Site Level	Account Manager	Chris Fairchild (Sales)	Sales		No	Yes
3	Send Marketing Mate	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	Paul Gonzalez - QA E	Sales		No	Yes
9	Send Insurance Certil	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 Leve	Site Sales Rep		Admin		No	Yes
15	Initial Contact	Internal Site Level	Account Manager		Sales		No	Yes
16	Credit Request	Internal Account Leve	Account Auditor		Admin		No	Yes

Field Descriptions

Fields	Descriptions
Task ID	The system generated ID assigned to the task when the task type is created. This is generally used for reporting purposes.
Name	The name of the task type that will display for selection when a task is created for an account or site.
Type ID	Controls where a task will display for selection and assignment. External type options a currently not supported. • **Internal Site Level** - Site specific and only visible to the site for which it's created. • **Internal Account Level** - Account level task that is visible on all sites associated w the account. • **Navu Nav Site Level** - Selectable in NavuNav, allowing drivers to create tasks fro their tablet. Use the **Assign to Default** and **Assign to Specific User** settings to ensure NavuNav-generated tasks are routed correctly.
Assign To Default	Option to configure a user assignment role as a default for new tasks to be assigned to.
Assign To Specific User	The specific user this task will be assigned to. This setting only saves when **Assign to Default** is set to **Specific User**.
Department	The department the task type is assigned to and allows for filtering tasks by departmen the Task Management screen.
Active	Defaults to 'Yes' and controls the availability of the task type for use.

Create Task Type

Refer to the following steps when creating a new task type.



1. Click the **green +** to open the Create 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 use.
3. Complete additional fields based on your company's established procedures.
4. Click **Save** when finished.

Permissions

Permission ID	Permission Name
23	Setup \ Account

Related Articles:

Add Task