

Database Query - Tasks Entity

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Pathway: [Database](#) > [Database Query](#)

The **Tasks** entity contains the data of each task created for an account including its creation date, due date, completion date, and completion notes. Tasks serve as a central communication and follow-up tool; used for customer accounts from notes to the driver to billing question to internal follow-up tasks.

The screenshot shows the 'Database Query' interface. At the top, there's a 'SAVED QUERY' dropdown and buttons for 'NEW', 'UPDATE', 'SAVE AS', and 'RUN'. Below this is a 'LIMIT / SORT' section. The main area is divided into 'ENTITIES' and 'DISPLAY FIELDS'. A 'SELECT MAIN ENTITY' popup is open, showing 'Tasks' as the selected entity with an empty 'ALIAS' field. A 'SAVE' button is at the bottom of the popup. The background interface shows a table with columns: ENTITY, SEQ, FIELD, and ALIAS.

Monitoring these interactions enables the business to measure staff responsiveness and identify recurring service issues that may require attention.

Initiating a Tasks Query

To generate a **Tasks** report using the Database Query tool, follow the steps outlined below. Reference the [Database Query](#) article for more details on how to use the tool for reporting.

1. Go to the [Database > Database Query](#) screen.
2. Click the **New** button in the top control bar. This will open the **Select Main Entity** popup.
3. Select **Tasks**.
4. After the **Display Fields** for the **Tasks** entity populate, select the check boxes for the fields you want to include in the report.
 - If a specific order is required, select the fields in the order you want them to appear in the query.
5. Click **Run** to execute the query. Results are generated in a new tab with the date and timestamp.

The screenshot shows the 'Database Query' interface with the 'Tasks' entity selected. The 'DISPLAY FIELDS' section shows a list of fields with checkboxes. The 'RUN' button is highlighted. Below the interface, a table titled 'Tasks Results: 09/23/2026 9:41:33 am' displays the query results. The table has columns: ENTITY, SEQ, FIELD, ALIAS, DESCRIPTION, ASSIGNED TO USER, COMPLETED TIME STAMP, COMPLETIONNOTE, CREATED BY USER, CREATED TIME STAMP, DUE DATE, PRIORITY, SITE ID, SITE NAME, TASK ID, TASK NOTE, and TASK TYPE.

ENTITY	SEQ	FIELD	ALIAS	DESCRIPTION	ASSIGNED TO USER	COMPLETED TIME STAMP	COMPLETIONNOTE	CREATED BY USER	CREATED TIME STAMP	DUE DATE	PRIORITY	SITE ID	SITE NAME	TASK ID	TASK NOTE	TASK TYPE
Tasks	1	Account Id														Billing/AR question
Tasks	2	Account Name														Driver Note
Tasks	3	Assigned To User														Test Internal Site Level
Tasks	4	Completed Time Stamp														Test Internal Site Level
Tasks	5	Completionnote														Test Internal Site Level
Tasks	6	Created By User														Test Internal Site Level
Tasks	7	Created Time Stamp														Test Internal Site Level
Tasks	8	Due Date														Test Internal Site Level
Tasks	9	Priority														Test Internal Site Level
Tasks	10	Site Id														Test Internal Site Level
Tasks	11	Site Name														Test Internal Site Level
Tasks	12	Task Id														Test Internal Site Level
Tasks	13	Task Note														Test Internal Site Level
Tasks	14	Task Type														Test Internal Site Level

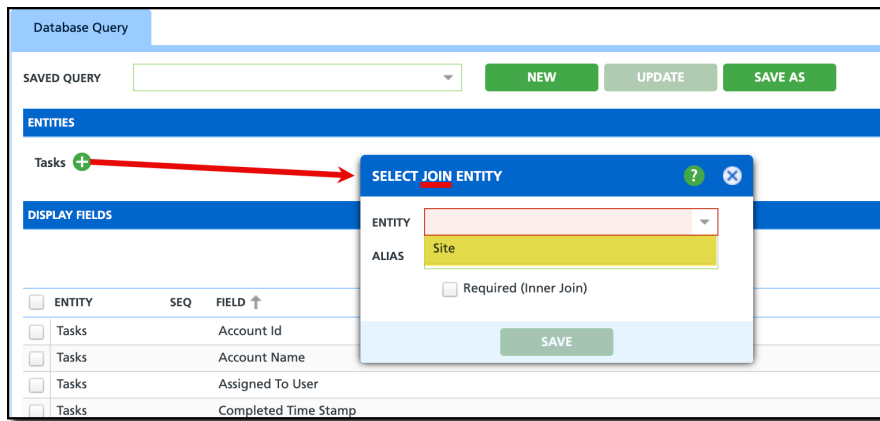
Columns Available for Display

The following data can be pulled in when running a **Tasks** report.

Field Name	Description
Account and Site	
Account ID	Unique ID for the customer account associated with the task.
Account Name	Name of the customer account associated with the task.
Site ID	Unique ID for the service site or location associated with the customer account. <i>May be blank when the task applies to the account rather than to a specific site.</i>
Site Name	Name of the service site or location associated with the customer account. <i>May be blank when the task applies to the account rather than to a specific site.</i>
Task Details	
Task ID	ID for the task record.
Task Type	Classification of the task, such as a driver note, billing or AR question, or general follow-up activity.
Task Note	Original instructions, customer communication, or follow-up details recorded when the task was created.
Priority	Indicates the urgency of the task and helps staff prioritize service, billing, customer communication, and operational follow-up activities.
Task Assignment and Workflow	
Assigned To User	User responsible for completing or following up on the task.
Due Date	Date and time by which the assigned user is expected to complete the task or take the required action.
Completed Time Stamp	Date when the task was marked as completed. <i>May be blank for tasks that remain open or were not formally closed.</i>
Completion Note	Notes describing the outcome of the task, actions taken, or reason the task could not be completed.
Record Audit Information	
Created By User	User who created the task record.
Created Time Stamp	Date and time when the task record was created.

Entity Join Options

When running reports against the **Tasks** entity, the option to pull in data from other entities is provided by utilizing the Join feature in the Database Query tool.



Only select entities can join with other select entities. The option provided for **Tasks** is:

- Site ([Accounts and Sites](#))

Reference the [Database Query](#) article for more details on how to use the Join option for more complex, detailed reporting.

Related Articles

[Database Query](#)

[Add Task](#)
