

MARKETPLACE APP · WORKPLACE-OPS

Tasks

Task management for incident follow-ups and project work.

Updated July 2026

MODEL	TIER	CAPABILITIES	INTELLIGENCE
Licensed · opt-in	Suite	39+	AI-powered

OVERVIEW

Not every task starts with someone typing it in. A Forms submission can trigger one automatically through conditional task rules, and AI Notepad turns a meeting's action items into assigned tasks, syncing completion back to the meeting when they're closed. A task can also link directly to an OKR Hub goal or key result, or to a Service Desk ticket.

Checklist tasks can require a photo, a note, or a signature before they can be marked done, and smart assignment routes new, unassigned work to the least-loaded eligible person under a per-user concurrent-task cap. The same task records also power Workspaces project to-dos, so project-level and organization-wide work run on one system instead of two.

An AI agent can create, assign, complete, and escalate tasks from chat, showing a diff you confirm before anything saves.

WHY TEAMS CHOOSE IT

- Plan work on a kanban board, calendar, or sortable table — filtered by assignee, status, priority, or due date.
- Build checklist tasks that require a photo, a note, or a signature before they can be marked done.
- Turn repeatable work into templates — daily, weekly, monthly, or every-shift — with role, location, and department auto-assignment.
- Delegate, reassign, or let smart assignment route each task to the least-loaded eligible person.
- Run tasks by chat: the AI agent creates, assigns, completes, and escalates with a preview before every write.
- Auto-create follow-up tasks from Forms submissions and AI Notepad meeting action items.

CAPABILITIES

Task Board & Views

- ✓ Kanban board grouped by status (default view)
- ✓ Calendar view of start and due dates
- ✓ Sortable, searchable table view
- ✓ Quick filters: status, priority, type, assignee, location, due window
- ✓ Keyword, semantic, and hybrid search across tasks and templates
- ✓ Live completion-rate and workload dashboard with CSV export

Create, Track & Complete

- ✓ Create tasks with title, description, and category
- ✓ Simple and checklist task types
- ✓ Priority levels: normal, important, critical
- ✓ Start-date + due-date planning window with a per-task reminder
- ✓ Clone an existing task
- ✓ Escalate, verify, and reopen tasks across their lifecycle

Checklists & Field Proof

- ✓ Ordered checklist items with per-item photo and notes requirements
- ✓ Photo upload and signature capture on completion
- ✓ Auto-complete the task when every checklist item is checked
- ✓ File and document attachments (PDF, Office, images)
- ✓ Sub-tasks (parent/child hierarchy)

Templates & Recurring Work

- ✓ Save any task as a reusable template
- ✓ Template library: create, edit, duplicate, activate/deactivate, bulk actions
- ✓ Industry starter-template packs (one-click load)
- ✓ AI-drafted task templates from a plain-language description
- ✓ Recurring schedules: daily, weekly, monthly, every shift
- ✓ Role-, location-, and department-based auto-assignment
- ✓ Estimated duration per template

Assignment & Delegation

- ✓ Assign tasks to any business user
- ✓ Reassign or delegate a task to another team member
- ✓ Smart auto-assignment to the least-loaded eligible user
- ✓ Bulk assign, complete, cancel, reopen, or delete tasks
- ✓ Generate tasks from one template for many users at once
- ✓ Per-user concurrent-task cap (admin-configurable)

AI Assistant & Notifications

- ✓ AI Tasks agent: create, assign, complete, cancel, reopen, and escalate by chat, with a diff preview before each write
- ✓ Admin toggle to enable or disable the AI agent per business
- ✓ In-app, email, and due-soon reminders on assignment, completion, and overdue
- ✓ SMS alerts for critical-priority tasks
- ✓ Daily task digest for managers

App Integrations

- ✓ Forms — auto-create tasks on submission via task rules
- ✓ AI Notepad — turn meeting action items into tasks
- ✓ OKR Hub — link tasks to Goals, Key Results, and Objectives
- ✓ Service Desk — link tasks to support tickets

Limits & Specs

Task title max length	255 characters
Board / table load caps	500 tasks (board) · 1,000 tasks (table)
Max document size	10 MB per file
Supported attachment formats	PDF, DOC/DOCX, XLS/XLSX, PPT/PPTX, TXT, CSV, and images
Recurrence options	Daily, Weekly, Monthly, Every Shift

USE CASES

- **Escalating blocked or urgent work**

A critical-priority task triggers an SMS alert on top of in-app and email notifications, and an assignee can flag any active task as blocked to notify their manager immediately.

- **Recurring operational routines**

Schedule daily opening checklists, weekly reviews, or every-shift closeouts from a template that auto-assigns by role or location.

- **New-hire onboarding checklists**

HR saves an onboarding template that generates a personalized checklist task for each new employee when they start.

- **Field completion with proof**

Frontline staff finish checklist items on mobile, attach a required photo, capture a signature, and post a completion note.

- **Meeting-to-action follow-through**

AI Notepad turns meeting action items into assigned tasks so decisions don't get lost after the call ends.

- **Manager oversight and audit**

Leads work the board, bulk-reassign or reopen tasks, verify completed work, and export a compliance CSV for the period.

PRICING & LICENSING

Pricing

License required (per-tenant opt-in)

License

Required (opt-in per business)

Tier

Suite

Pricing is tailored to your organization — [talk to sales for pricing & a live demo](#). Final commercial terms per your agreement.

FAQ

How do recurring tasks work?

Set a task or template to repeat daily, weekly, monthly, or every shift. New task instances are generated automatically on the schedule, and templates can auto-assign each occurrence by role, location, or department.

Can tasks be created automatically from other apps?

Yes. Forms can create tasks on submission via task rules, and AI Notepad turns meeting action items into tasks. Tasks can also be linked to OKR Hub Goals/Key Results/Objectives and to Service Desk tickets.

Can I require a photo, note, or signature to complete a task?

Yes. Checklist items can each require a photo or a note, and a task can require a completion photo and a captured signature before it is marked done. Tasks also accept file and document attachments (PDF, Office formats, and images) up to 10 MB each.

What can the AI agent do?

From the Ask AI sidebar, the Tasks agent can list, create, assign, complete, cancel, reopen, and escalate tasks in plain language. Write actions show a diff preview and ask you to confirm before anything is saved, and an admin can turn the agent on or off per business.

Who can assign tasks, and can assignment be automated?

Admins and per-app Tasks administrators can always assign; whether plain managers can assign is an admin setting. When smart assignment is enabled, a new task with no assignee is routed automatically to the least-loaded eligible user, and you can cap the number of concurrent active tasks per person.

What's the difference between Tasks and Workspaces to-dos?

They share the same underlying record, but Workspaces to-dos live inside a specific project workspace and appear on that project's canvas with workspace-branded notifications. The standalone Tasks app manages organization-wide tasks with reusable templates, recurrence, a kanban/calendar/table board, manager analytics, and cross-app integrations.

How is Tasks licensed and priced?

Tasks requires a license and is opt-in per tenant — an administrator enables it for your business from the Apps Marketplace, and it is disabled by default until then. Contact your MangoApps administrator about enabling it for your organization.