

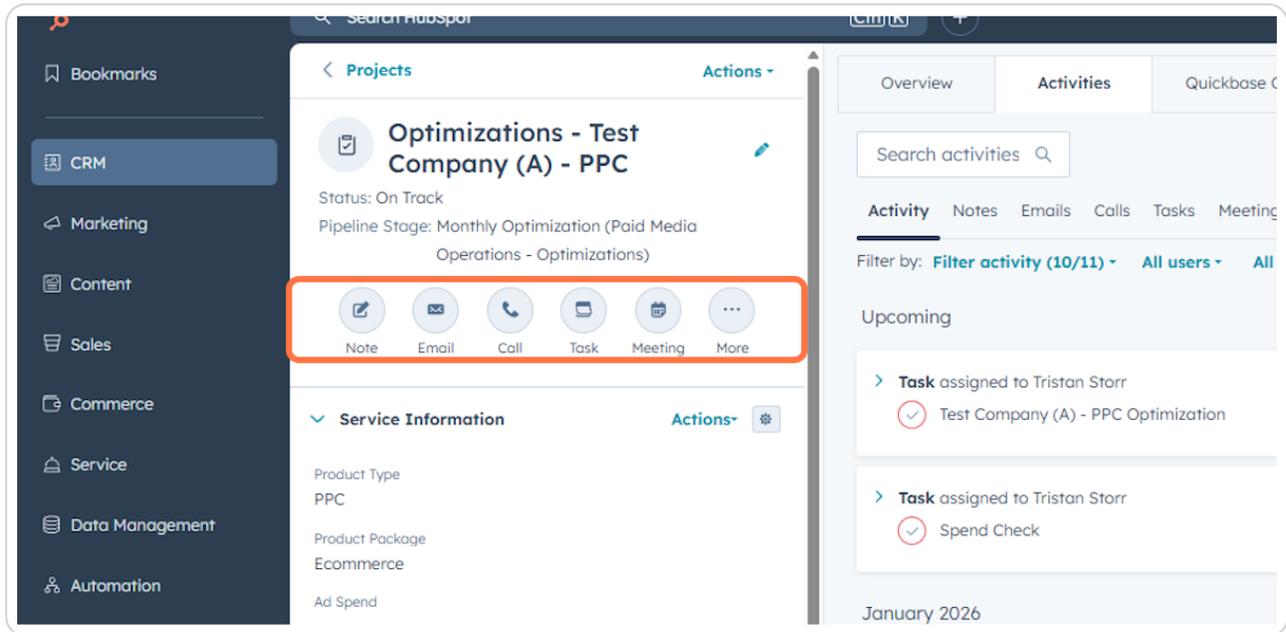
Create and Manage Tasks in HubSpot

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Created by	Creation Date	Last Updated
Logical Position	Jan 13, 2026	Jan 13, 2026

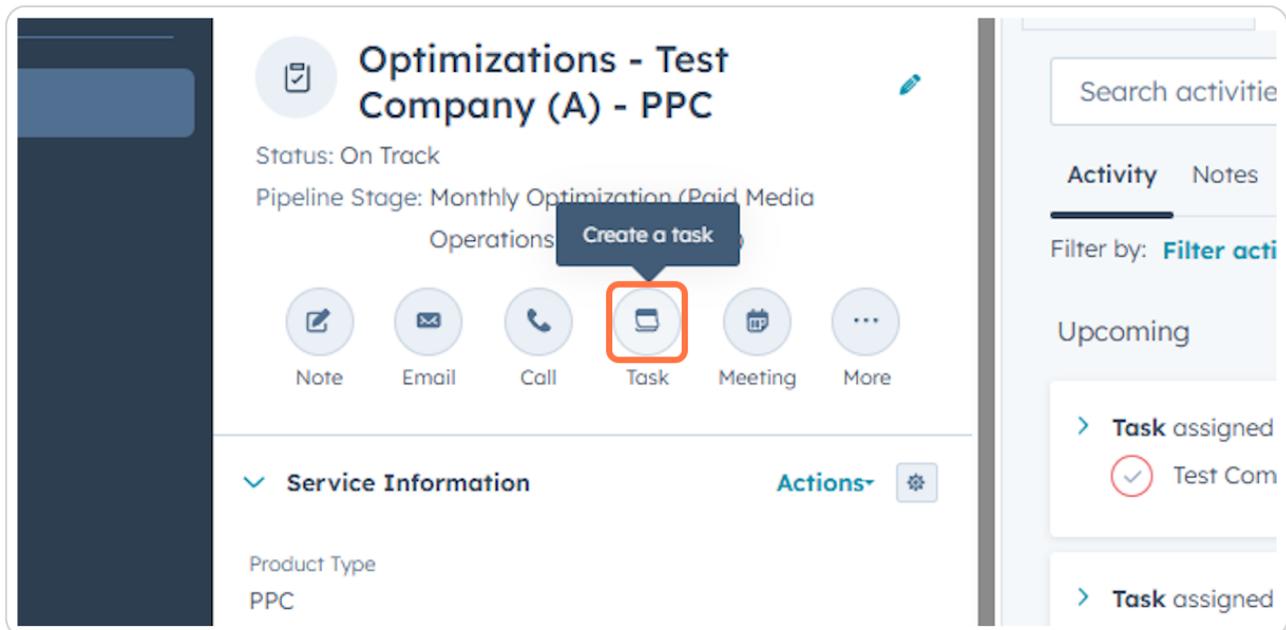
STEP 1

Create a new Activity using the Activity bar in the top left corner of the HubSpot record you are viewing.



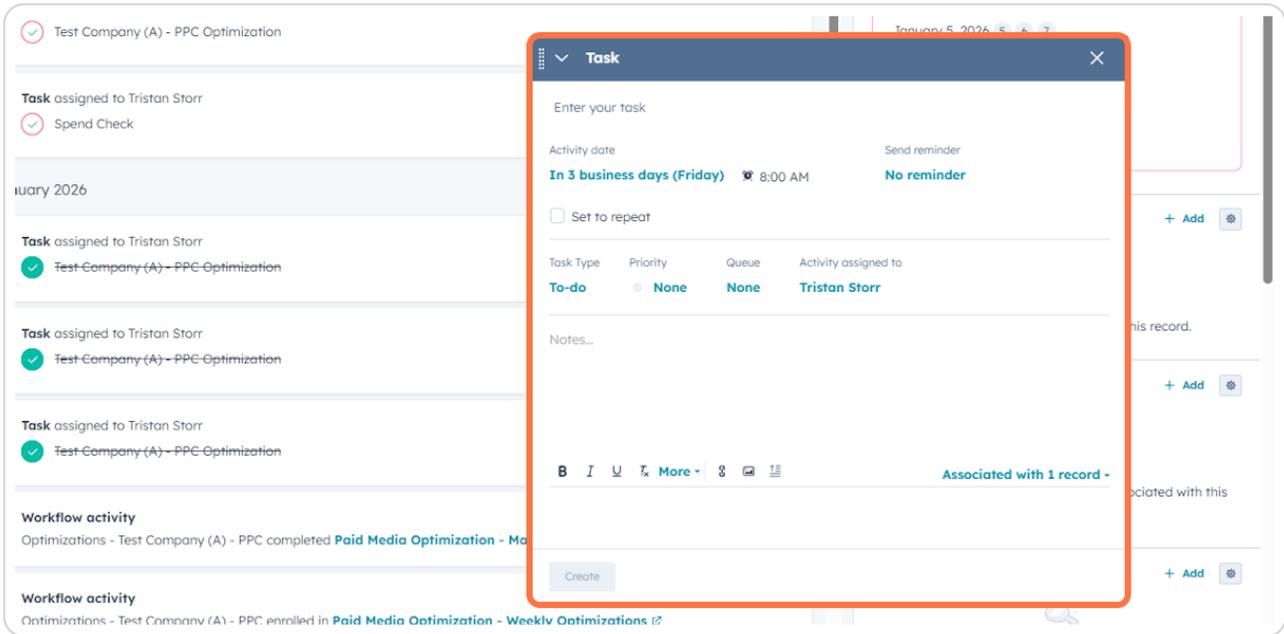
STEP 2

Click on Create a task



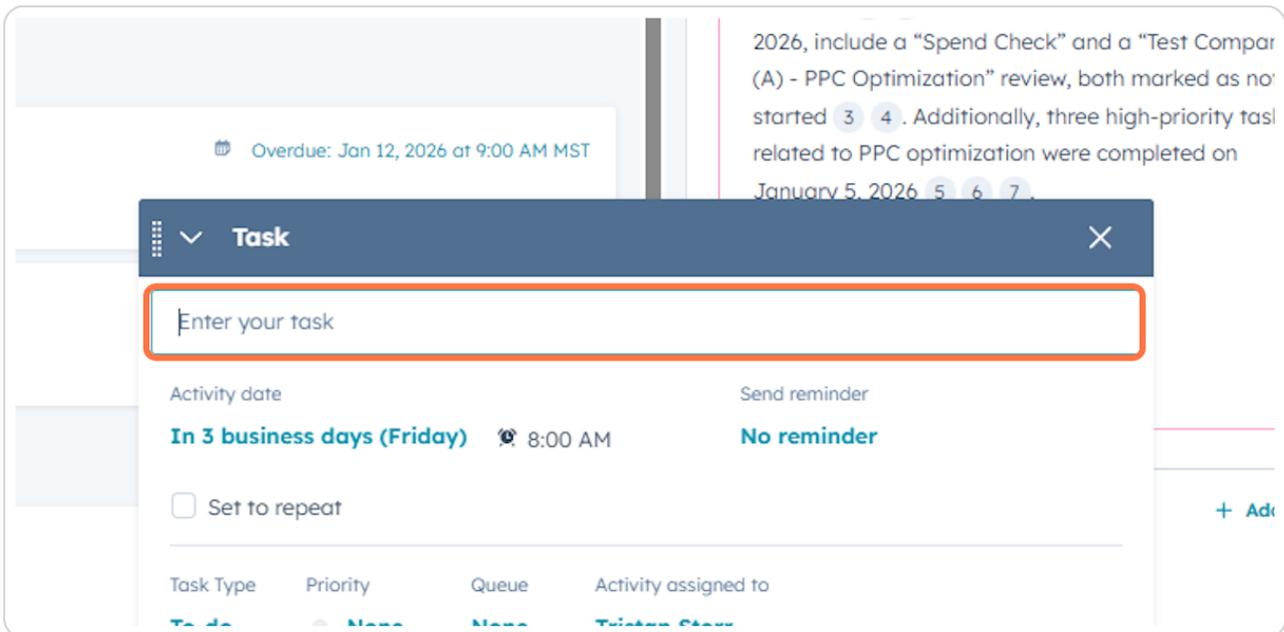
STEP 3

An Activity Creator Window will appear in the bottom right corner of the screen.



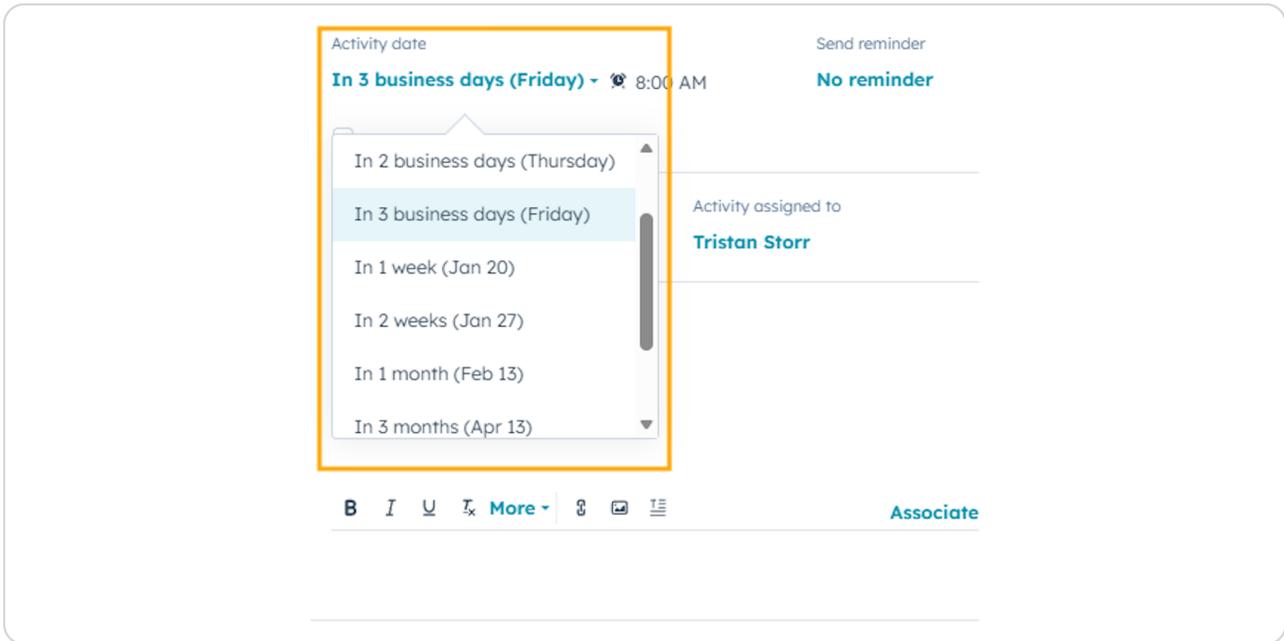
STEP 4

Give the Task a Title



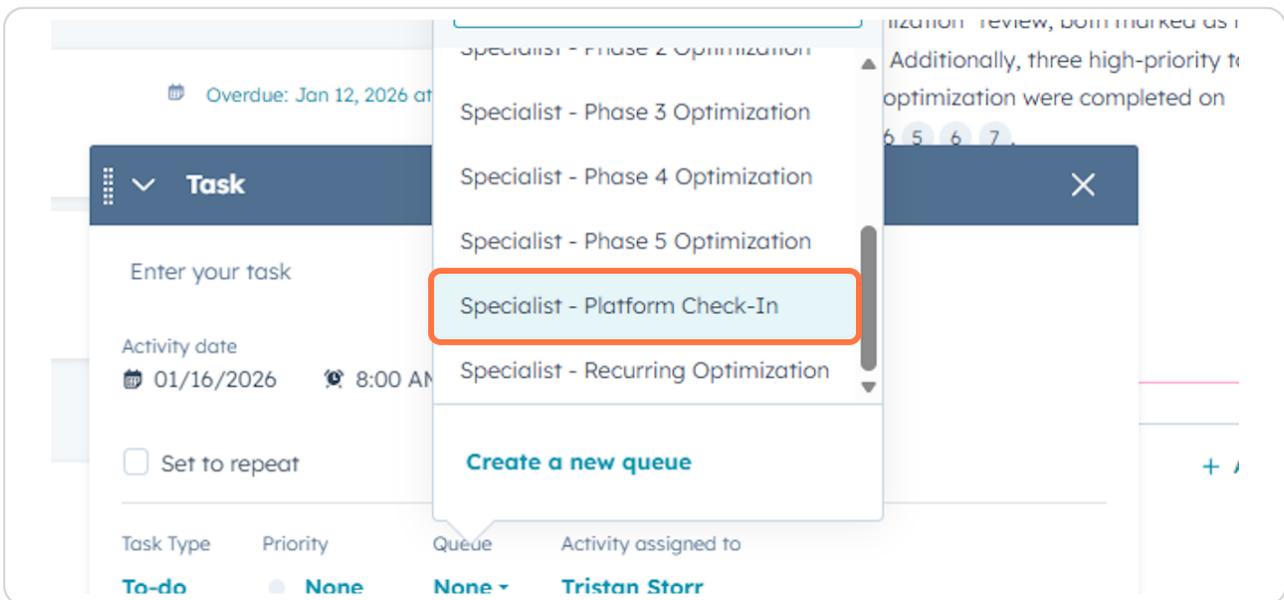
STEP 5

Set a date for the Task. You can select from a predefined window or select Custom Date to open the Date Picker function.



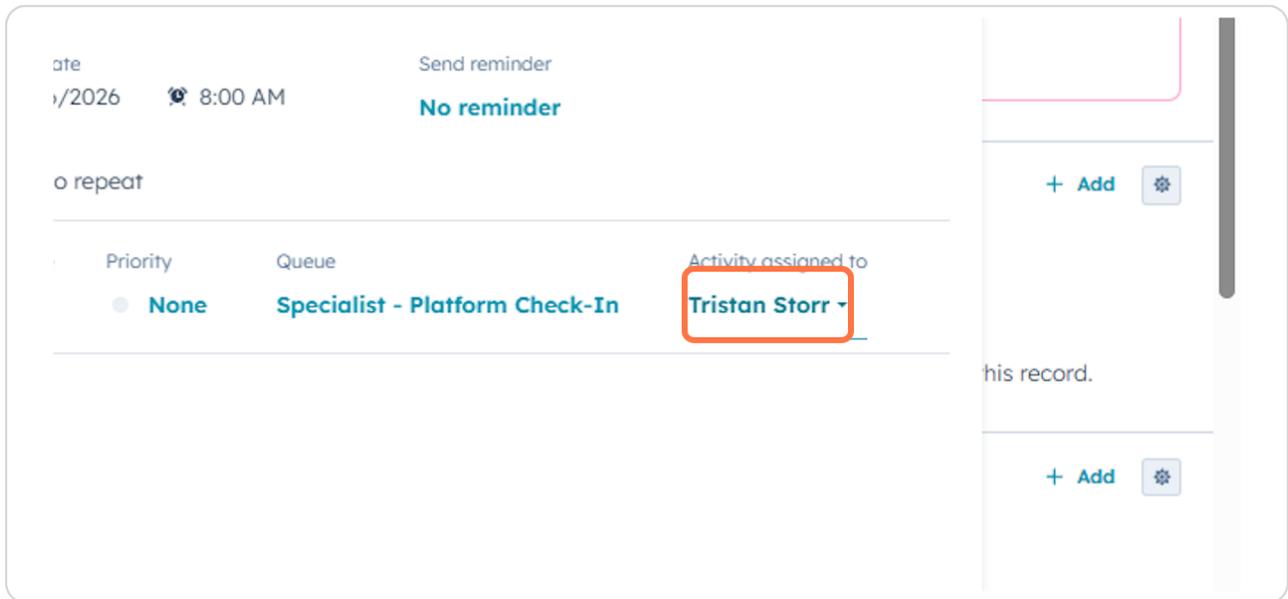
STEP 6

Assign a queue to the task. You can filter for Specialist Queues by typing "Specialist" and selecting from the filtered options.



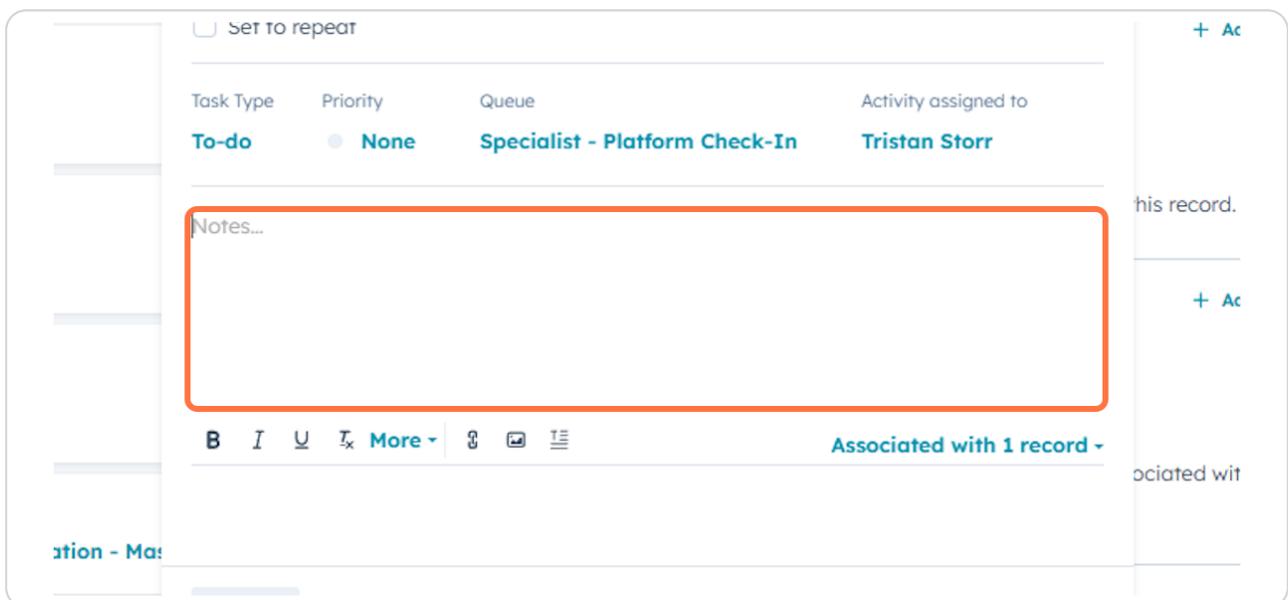
STEP 7

Tasks will be assigned to you by default since you are the creator. You can reassign the task to another user by selecting your name and opening the user dropdown menu.



STEP 8

Give the task a description. Use the rich text features to format the text if necessary.



STEP 9

Once you create the task, it will appear in the Activity feed of the record(s) it is associated with.

The screenshot shows a task card titled "Task assigned to Tristan Storr" with a due date of "Jan 16, 2026 at 8:00 AM MST". The task is "Test Task 1" and is assigned to "Tristan Storr". The card is highlighted with a red border. The card includes a "Due date" section with "In 3 business days (Friday)" and "8:00 AM", a "Reminder" section with "No reminder" and "Set to repeat", and a "Type" section with "To-do", "Priority" of "None", "Queue" of "Specialist - Platform Check-In", and "Assigned to" of "Tristan Storr". The card also has an "Add comment" button and a "1 association" link. The background shows a calendar view for January 2026 with other tasks listed.

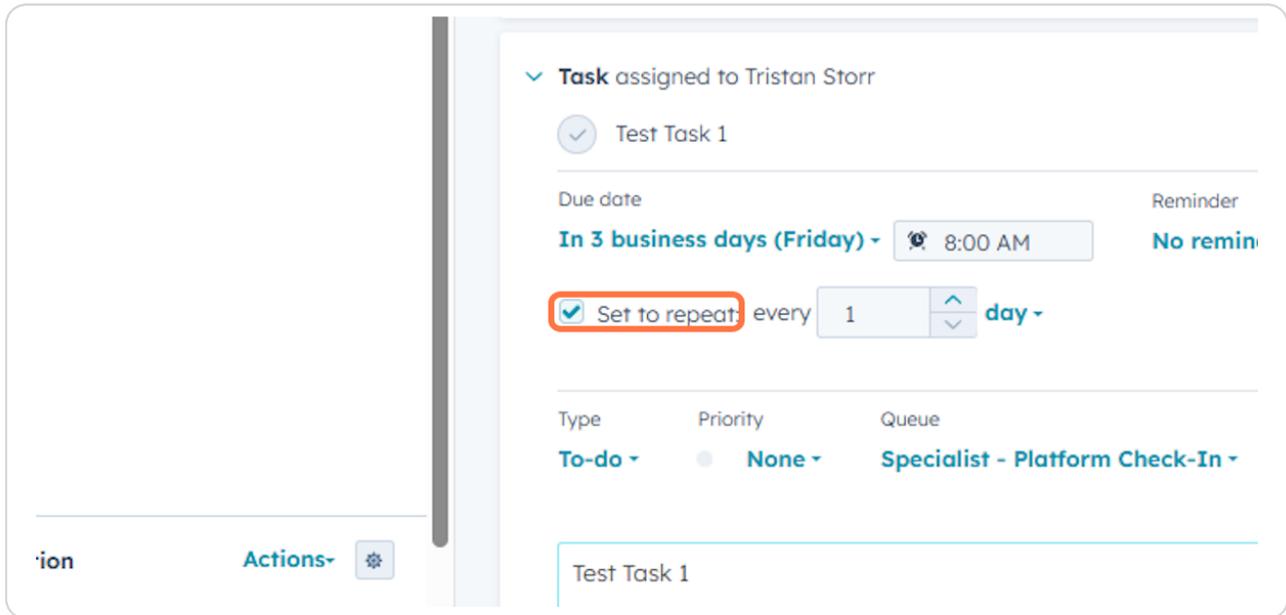
STEP 10

To edit the task, click on the attribute you wish to change on the Task Card

The screenshot shows the same task card as in Step 9, but with a red border around the "Test Task 1" text and a blue pencil icon to its right, indicating that the task is being edited. The rest of the card and the background activity feed are the same as in the previous screenshot.

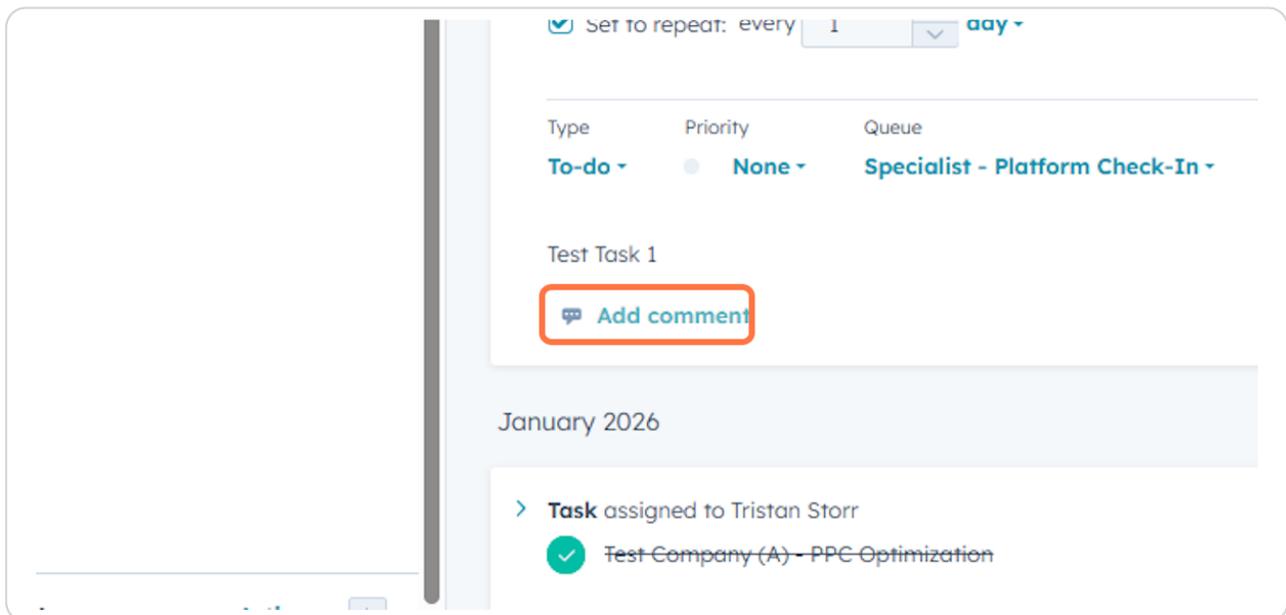
STEP 11

If you wish to establish a Repeating task, check "Set to Repeat" and select your repeating cadence



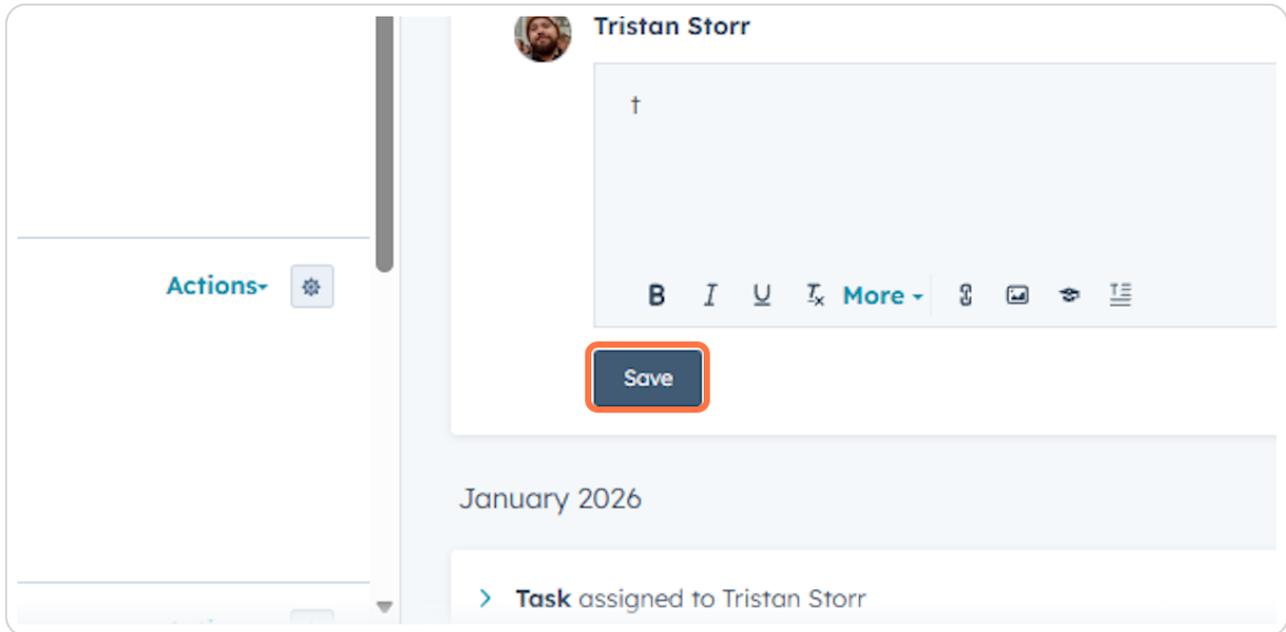
STEP 12

You can comment on your own or other's activities by selecting Add Comment in the bottom left corner of the Activity card.



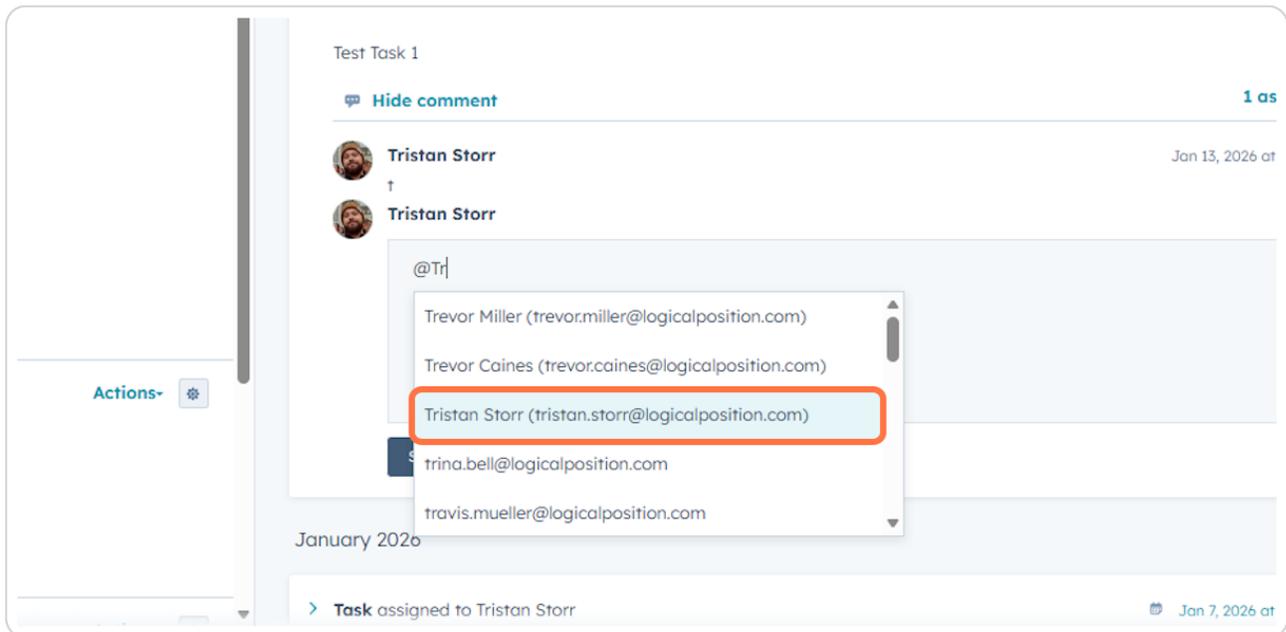
STEP 13

Leave your comment in the text box and select "Save"



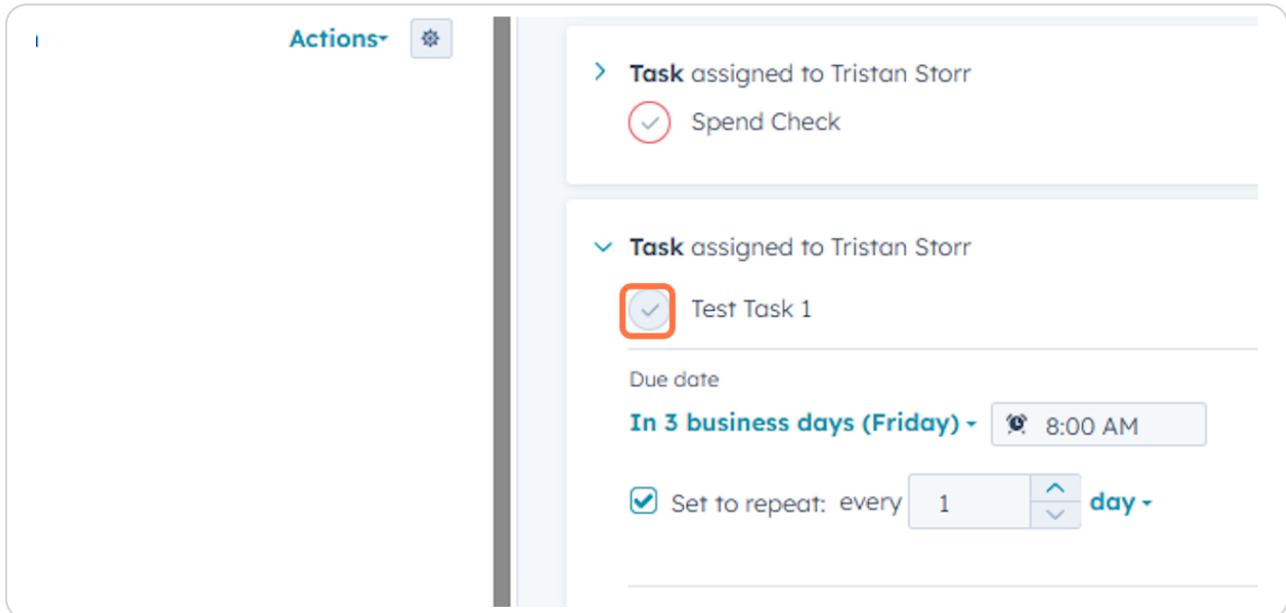
STEP 14

You can tag users in your comments by using the @ function and selecting the user from the dropdown.



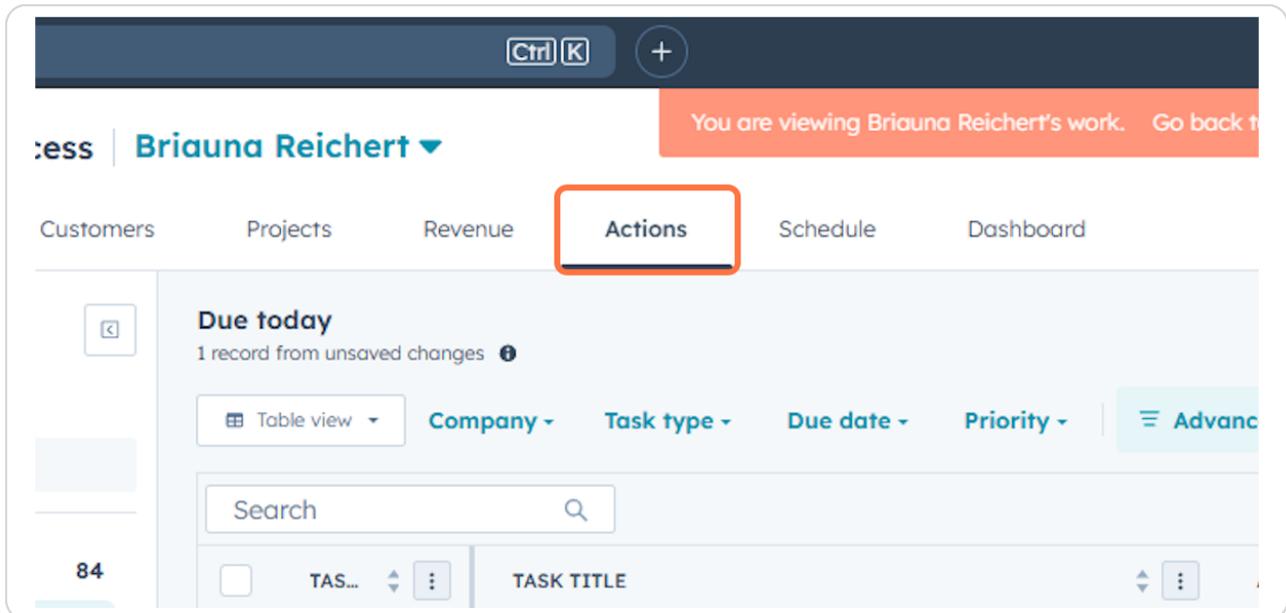
STEP 15

To complete a task, simply mark the circle checkmark icon next to the Task Title.



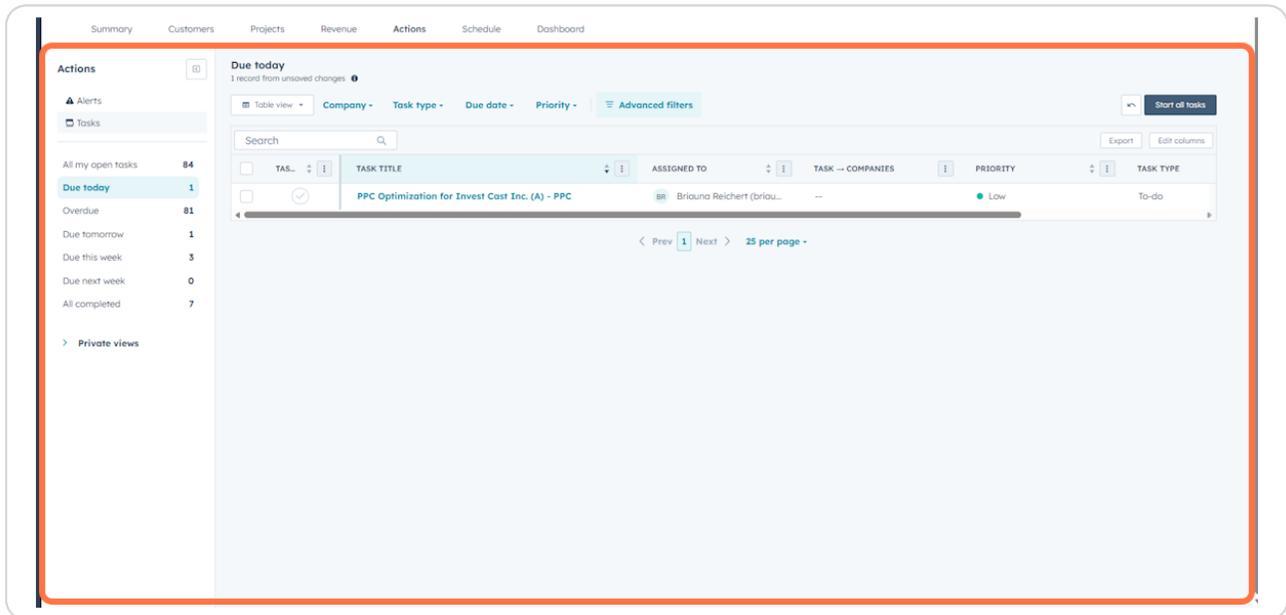
STEP 16

To find your Tasks, you can use the Customer Success workspace "Actions" tab



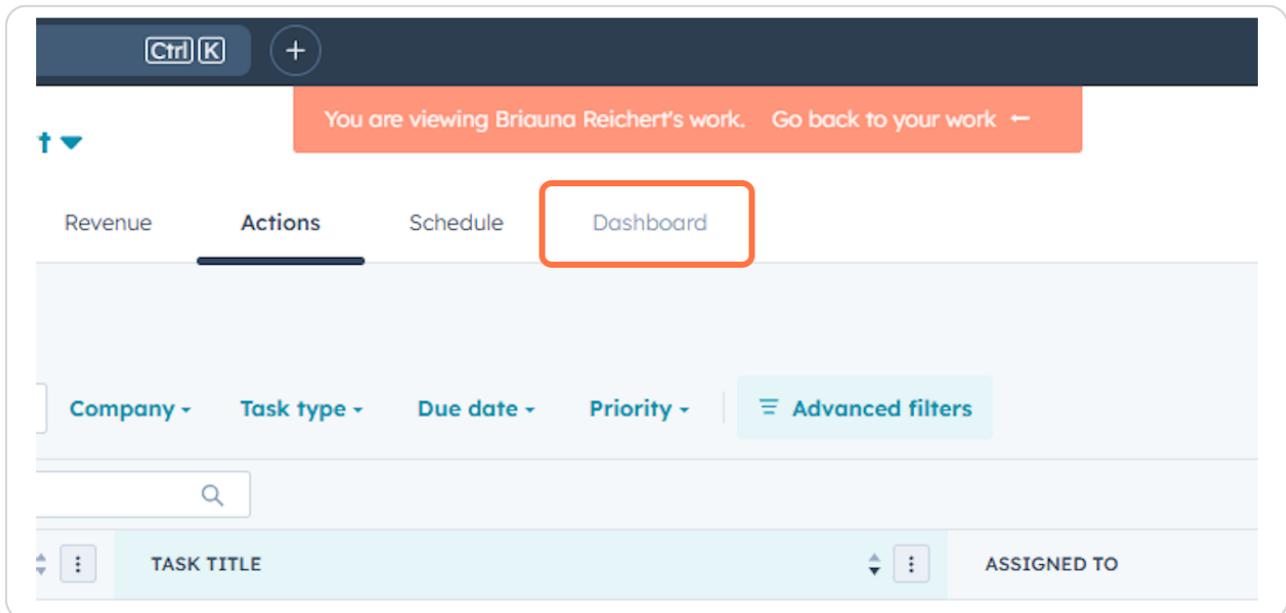
STEP 17

This page will provide several filtered views for viewing a list of tasks assigned to you, including those due today, tomorrow, overdue tasks, and those due this and next week.



STEP 18

You can also find custom task reporting by navigating to the Dashboard tab.



STEP 19

Here you will find several reports that have custom task filters based on task queues, due dates, etc. If you have ideas for task views you'd like to see here, please share your suggestions with your Team Lead so that we can implement them.

The screenshot displays the 'Paid Media Operations Dashboard' with several sections:

- My Tasks Today:** A section with a magnifying glass icon and a message: 'There is no data to show in this time frame. Try changing the date range.'
- My Open Change Requests:** A table with columns: CHANGE REQUEST, TICKET STATUS, DUE DATE, SUBMITTER, PRIORITY, and DESCRIPTION. It lists two tickets in 'In-Progress (Back Office Request)' status.
- My Book:** A table with columns: PROJECT TITLE and LAST ACTIVITY DATE - DAILY. It lists 'On-Boarding - Test Company (A) - Amazon' and 'Optimizations - Test Company (A) - PPC'.
- Non-Optimization Tasks:** A table with columns: ASSOCIATED PROJECT, TASK TITLE, QUEUE, and DUE DATE - DAILY. It lists tasks like 'Spend Check' and 'Ensure Outstanding PPC Action Items Are Completed'.

STEP 20

Finally, you can view your Tasks from the Task tab in the CRM menu of HubSpot

The screenshot shows the HubSpot CRM menu on the left side of the interface. The 'Tasks' option is highlighted with an orange box. The menu items are:

- Breeze
- Development
- Partner
- Platform Accounts
- Segments (Lists)
- Inbox
- Calls
- Tasks** (highlighted)
- Playbooks
- Message Templates
- Snippets

The background shows a 'Change Requests' table with columns for 'TICKET STATUS' and 'ASSOCIATED PROJECT'.

STEP 21

Here, you can find a list of all tasks assigned to you

354 records

All Due today Overdue Upcoming Test View Task ID Export AM Assignment Tasks + Add view (7/50) All Views

Assigned to (1) Task type Due date Queue Clear all Advanced filters Save view Start 354 tasks

Search task title and note

STATUS	TITLE	ASSOCIATED CONTACT	ASSOCIATED COMPANY	LAST CONTACTED	LAST ENGAGEMENT	TASK TYPE	DUE DATE
<input checked="" type="checkbox"/>	Monthly Call	Testy Testing and Tr...	TEST ACCOUNT	a month ago	a month ago	Call	October 5, 2025 5:00 I
<input checked="" type="checkbox"/>	Test Repeat Task (123)	--	TEST ACCOUNT	--	--	To-do	October 6, 2025 1:00 P
<input checked="" type="checkbox"/>	Monthly Task	Tristan Storr	TEST ACCOUNT	a month ago	a month ago	To-do	October 6, 2025 5:00 I
<input checked="" type="checkbox"/>	Monthly Call	Testy Testing and Tr...	TEST ACCOUNT	a month ago	a month ago	Call	October 6, 2025 5:00 I
<input checked="" type="checkbox"/>	Test Repeat Task (123)	--	TEST ACCOUNT	--	--	To-do	October 7, 2025 1:00 P
<input checked="" type="checkbox"/>	Monthly Task	Tristan Storr	TEST ACCOUNT	a month ago	a month ago	To-do	October 7, 2025 5:00 P
<input checked="" type="checkbox"/>	Monthly Call	Testy Testing and Tr...	TEST ACCOUNT	a month ago	a month ago	Call	October 7, 2025 5:00 P
<input checked="" type="checkbox"/>	Test Repeat Task (123)	--	TEST ACCOUNT	--	--	To-do	October 8, 2025 1:00 I
<input checked="" type="checkbox"/>	Monthly Task	Tristan Storr	TEST ACCOUNT	a month ago	a month ago	To-do	October 8, 2025 5:00 I
<input checked="" type="checkbox"/>	Monthly Call	Testy Testing and Tr...	TEST ACCOUNT	a month ago	a month ago	Call	October 8, 2025 5:00 I
<input checked="" type="checkbox"/>	Test Repeat Task (123)	--	TEST ACCOUNT	--	--	To-do	October 9, 2025 1:00 P
<input checked="" type="checkbox"/>	Monthly Task	Tristan Storr	TEST ACCOUNT	a month ago	a month ago	To-do	October 9, 2025 5:00 I
<input checked="" type="checkbox"/>	Monthly Call	Testy Testing and Tr...	TEST ACCOUNT	a month ago	a month ago	Call	October 9, 2025 5:00 I
<input checked="" type="checkbox"/>	Test Repeat Task (123)	--	TEST ACCOUNT	--	--	To-do	October 10, 2025 1:00

< Prev 1 2 3 4 5 6 7 8 9 10 11 Next > 25 per page

STEP 22

Click on the Task title to navigate to the record the task is associated with

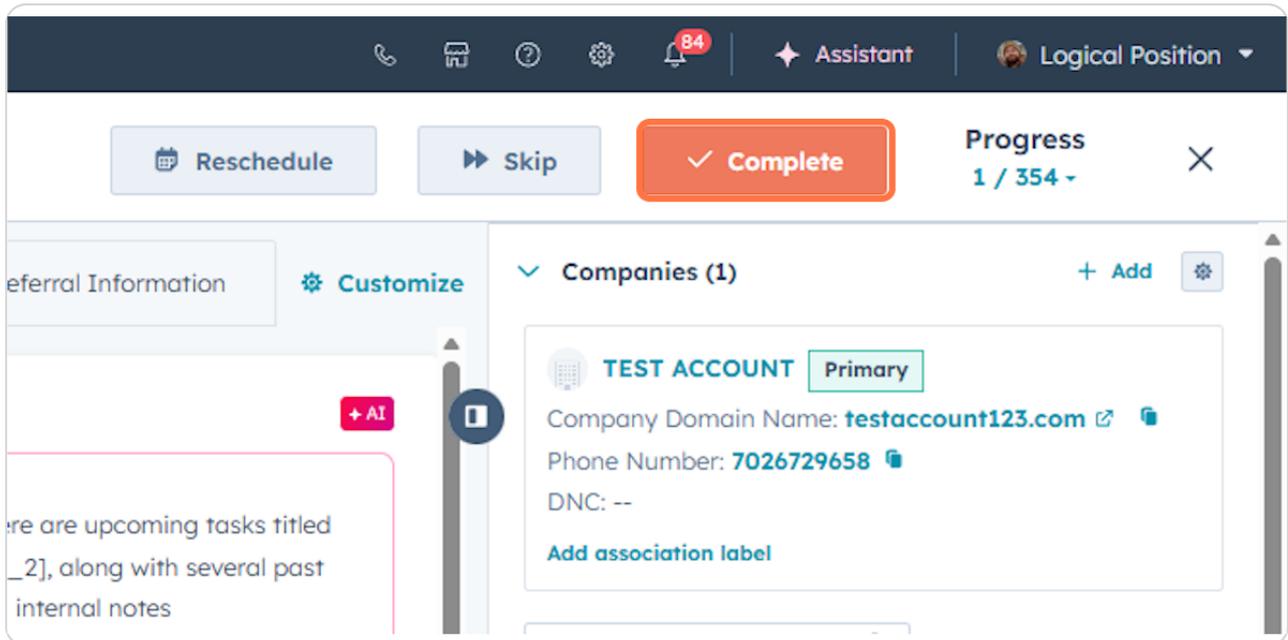
Assigned to (1) Task type Due date Queue Clear all Advanced filters

Search task title and note

STATUS	TITLE	ASSOCIATED CONTACT
<input checked="" type="checkbox"/>	Monthly Call	Testy Testing and Tr...
<input checked="" type="checkbox"/>	Test Repeat Task (123)	--
<input checked="" type="checkbox"/>	Monthly Task	Tristan Storr
<input checked="" type="checkbox"/>	Monthly Call	Testy Testing and Tr...
<input checked="" type="checkbox"/>	Test Repeat Task (123)	--
<input checked="" type="checkbox"/>	Monthly Task	Tristan Storr

STEP 23

On the record, HubSpot will provide a small interface towards the top of the page for you to reschedule, skip or mark the task as complete.



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