



Create And Manage Tasks In Cliniqua360 Platform

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This tutorial guides you through creating and managing tasks within the Cliniqua360 Clinic Management Platform.

Go to app.cliniqa360.com

01 Introduction

You will learn how to add task details, prescriptions, notes, and update task statuses effectively.

The screenshot displays the Cliniqua360 Task Board interface. On the left is a dark sidebar with a navigation menu. The main content area shows a 'Task Board' for the 'Main Branch' with a date filter set to 'mm/dd/yyyy'. The board is divided into four columns representing different stages: 'Patient Info' (0 tasks), 'Checkup' (1 task), 'Diagnosis' (1 task), and 'Treatment' (0 tasks). The 'Checkup' column contains a task for 'Maria Gonzales' with a 'High' priority, and the 'Diagnosis' column contains a task for 'John Dela Cruz' with a 'Medium' priority. Both tasks include a description, a priority indicator, a date, and an update timestamp. A user profile icon with the number '9' is visible in the bottom right corner.

General

- Dashboard
- POS
- Transactions
- Appointments
- Patients
- Expenses
- Inventory
- Services
- Add-ons
- Reports
- Task Board**

Growth

- SMS Marketing
- View Tutorial
- Settings
- About Cliniqua360
- Knowledge Base
- Report Bug / Feedback

Main Branch

Task Board

3 total tasks • Track patient journey through stages

mm/dd/yyyy

Patient Info 0

No tasks

Checkup 1

Maria Gonzales

Review progressive lens adjustments and symptoms.

High 1 Apr 7, 4:20 PM

Active about 14m ago Updated by Demo Clin...

Diagnosis 1

John Dela Cruz

Initial contact lens fitting and comfort check.

Medium Apr 7, 4:20 PM

Active about 14m ago Updated by Demo Clin...

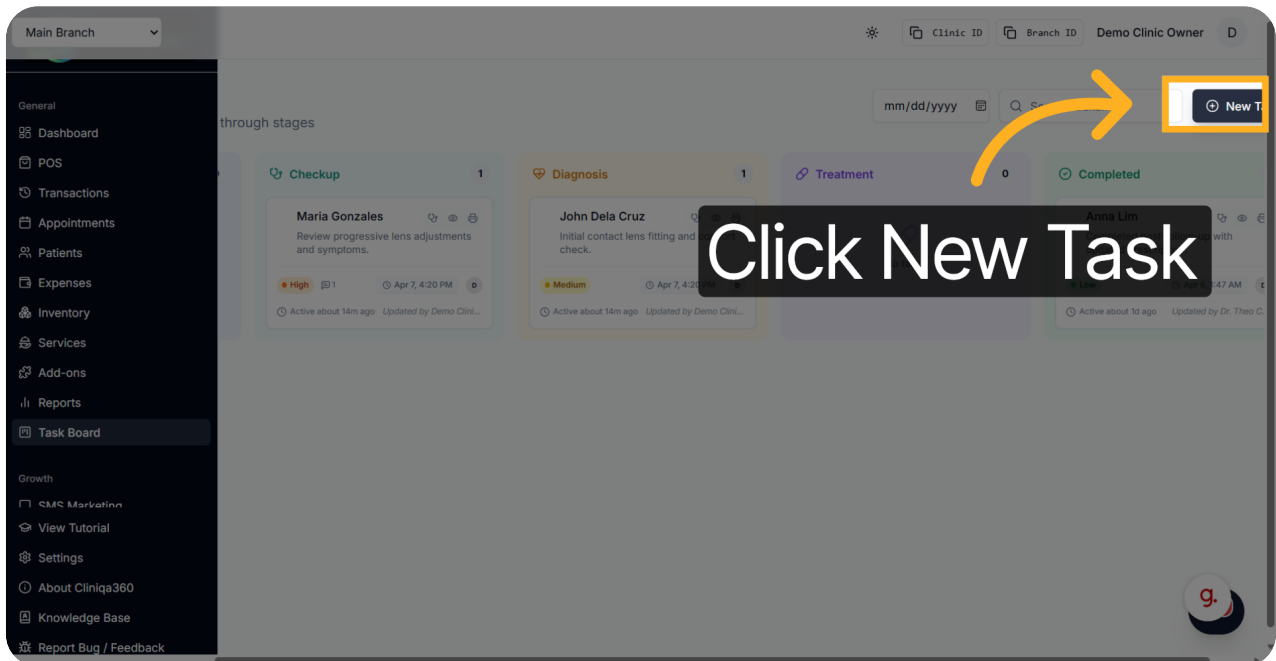
Treatment 0

No tasks

9

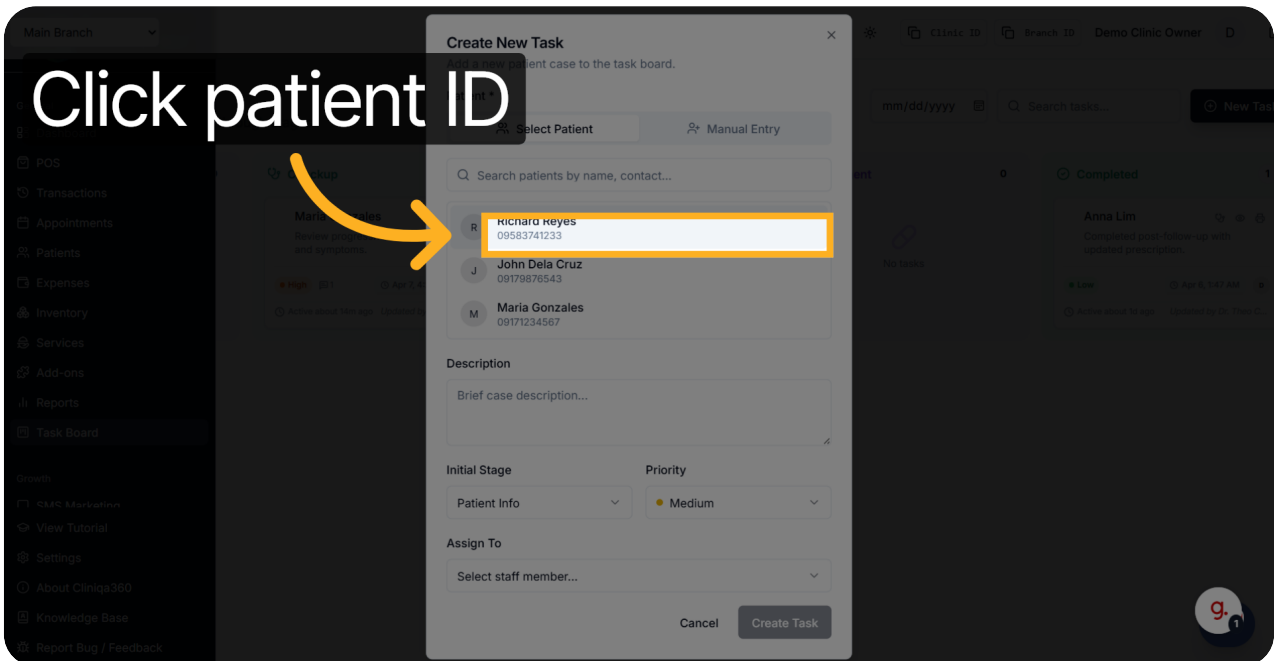
02 Initiate New Task Creation

Click "New Task" to start creating a new task in the Cliniqua360 platform.



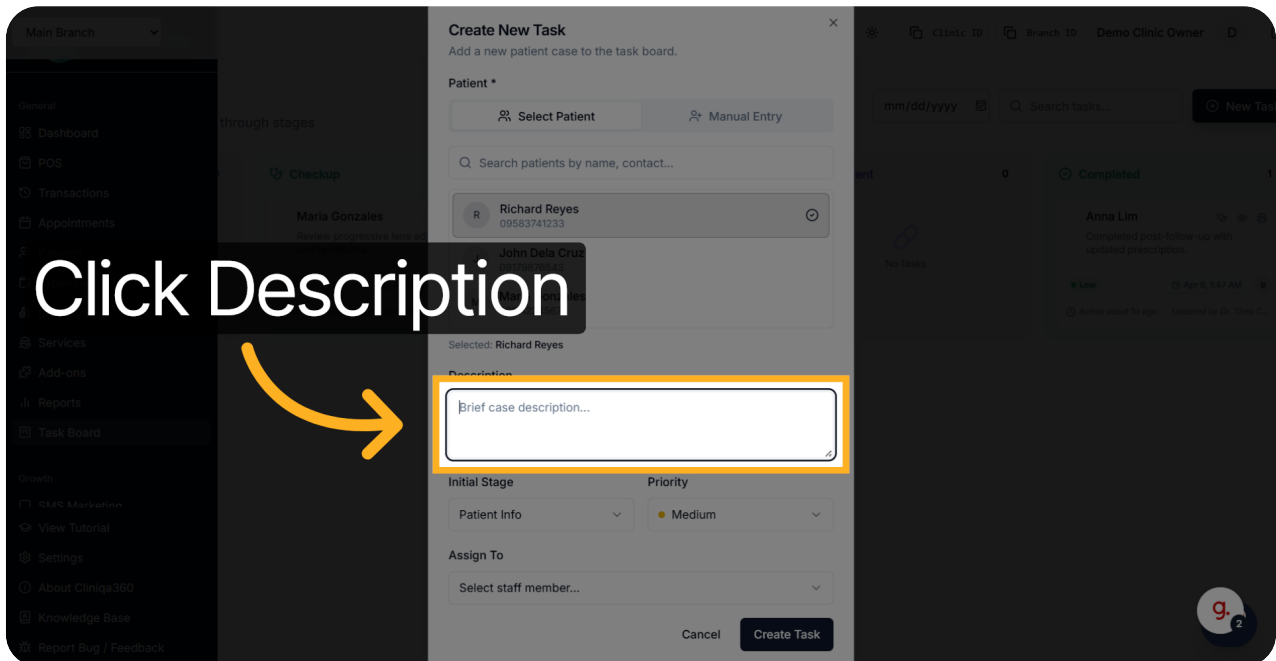
03 Select Patient Identifier

Select the patient associated with the task.



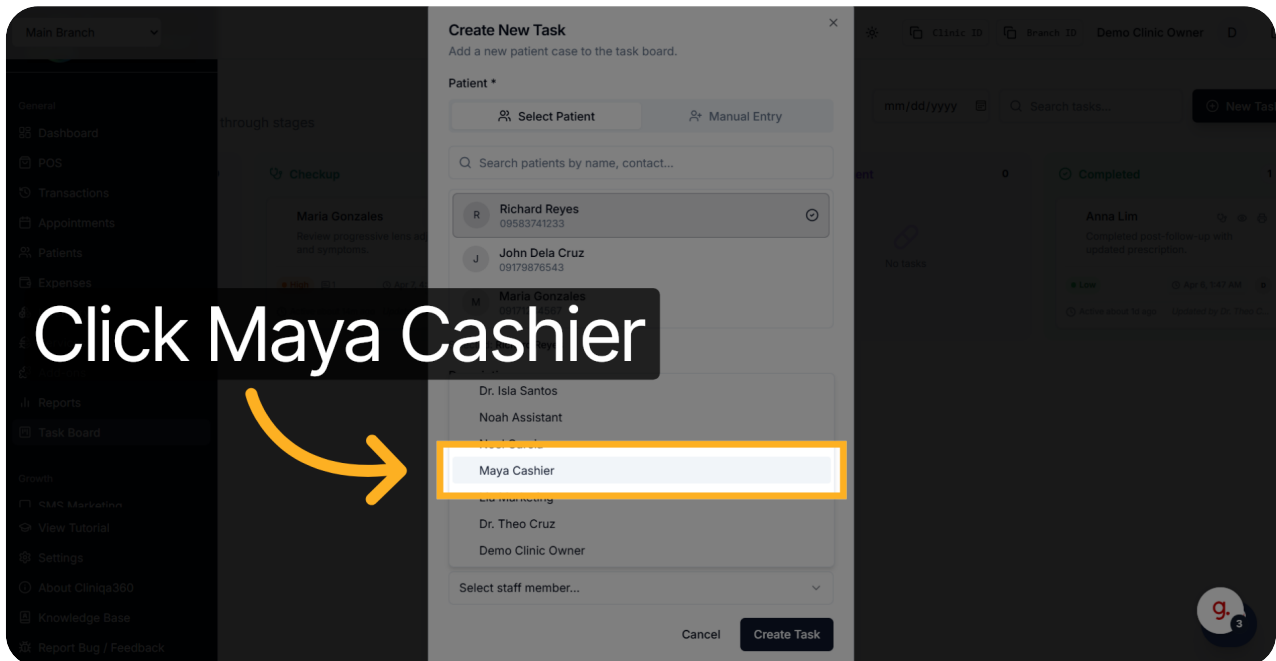
04 Access Description Field

Click "Description" to enter details about the task.



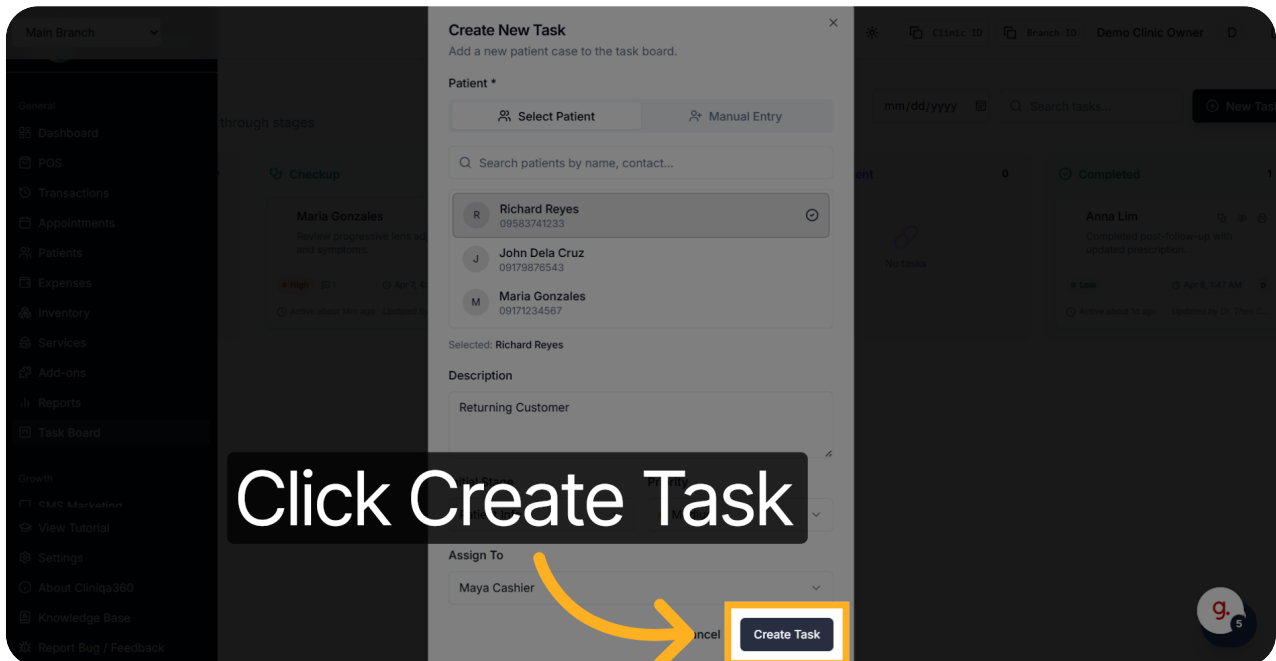
05 Assign Task To User

Select the staff member to whom the task will be assigned.



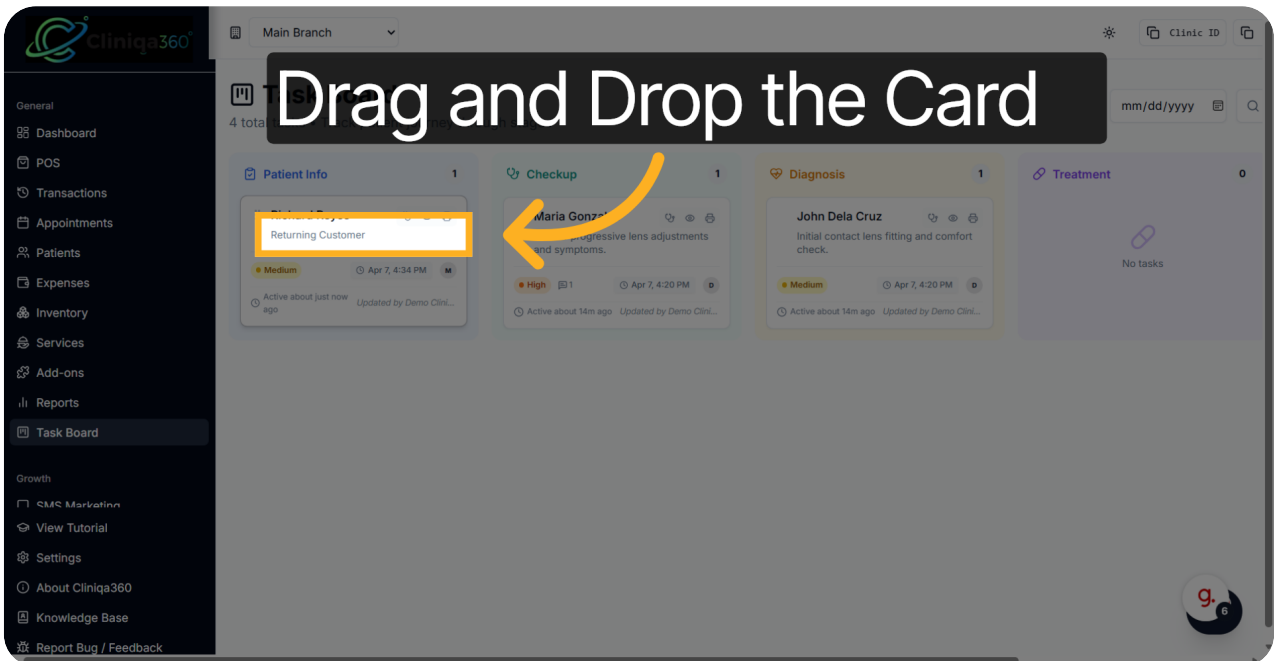
06 Create The Task

Click "Create Task" to save and create the new task in the system.



07 Open Task Details

Drag and drop the card to change its status on the board.



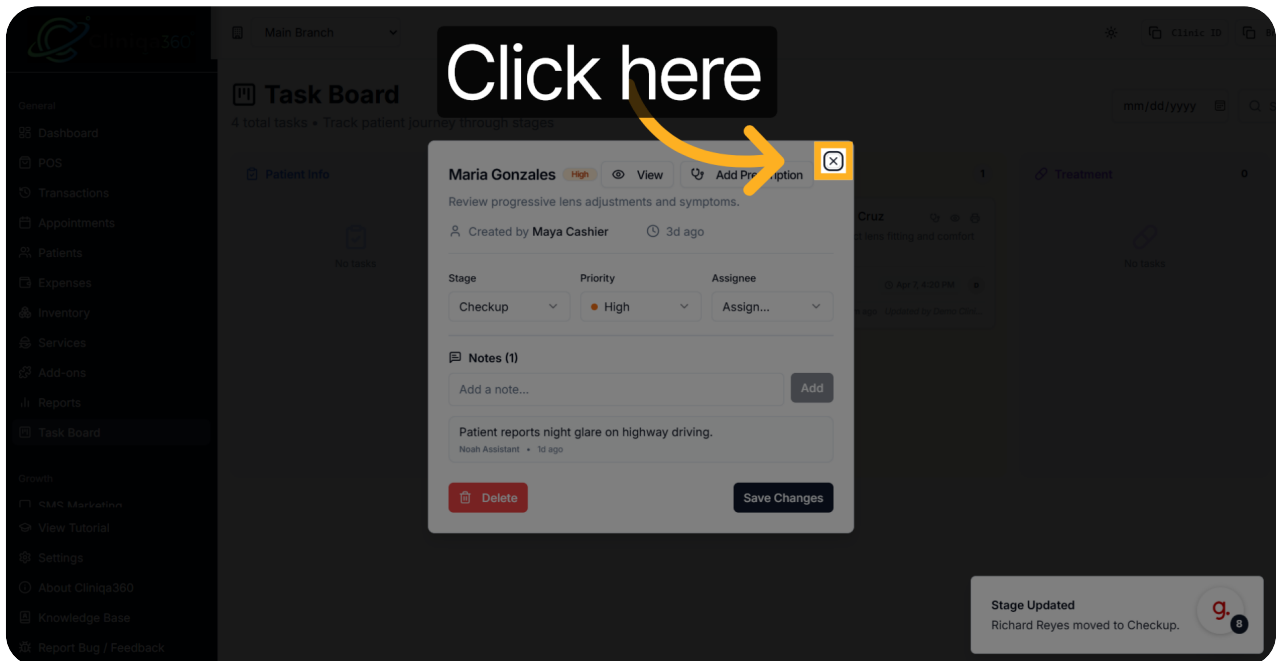
08 Review Task Notes

Click car to examine the details.

The screenshot displays the Clinica360 Task Board interface. On the left is a dark sidebar with a navigation menu including: General (Dashboard, POS, Transactions, Expenses, Inventory, Services, Add-ons, Reports, Task Board), Growth (CMS Marketing, View Tutorial, Settings, About Clinica360, Knowledge Base), and Report Bug / Feedback. The main content area is titled 'Task Board' and shows '4 total tasks • Track patient journey through stages'. It is divided into four columns: Patient Info (0 tasks), Checkup (2 tasks), Diagnosis (1 task), and Treatment (0 tasks). A task for 'Richard Reyes' is highlighted in the 'Checkup' column. A yellow callout box points to the task with the text 'Click review notes'. The task details include: 'Review progressive lens adjustments and symptoms.', 'High' priority, '1' task, and 'Apr 7, 4:20 PM' due date. A notification at the bottom right states 'Stage Updated: Richard Reyes moved to Checkup.' with a '9' icon and a '7' badge.

09 Access Additional Options

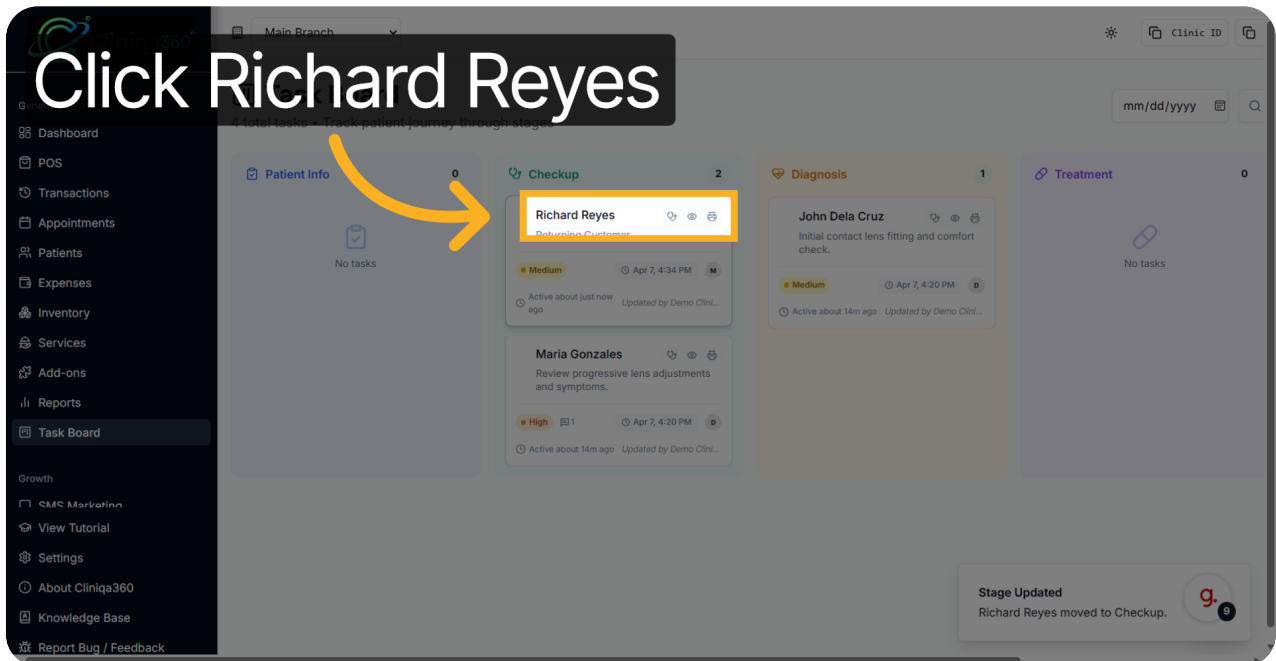
Click here to access more options related to the task.



The screenshot displays a software interface for a task board. On the left is a dark sidebar with a navigation menu including items like Dashboard, POS, Transactions, Appointments, Patients, Expenses, Inventory, Services, Add-ons, Reports, Task Board, Growth, CRM Marketing, View Tutorial, Settings, About Clinica360, Knowledge Base, and Report Bug / Feedback. The main area is titled 'Task Board' and shows a task for 'Maria Gonzales' with a 'High' priority. The task description is 'Review progressive lens adjustments and symptoms.' It was created by 'Maya Cashier' 3 days ago. The task has a 'Stage' of 'Checkup', a 'Priority' of 'High', and an 'Assignee' field. A 'Notes (1)' section contains the note 'Patient reports night glare on highway driving.' by 'Noah Assistant' 1 day ago. A 'More Options' menu is open, showing 'Delete' and 'Save Changes' buttons. A yellow callout box with the text 'Click here' and an arrow points to the 'More Options' icon. A notification at the bottom right states 'Stage Updated: Richard Reyes moved to Checkup.'

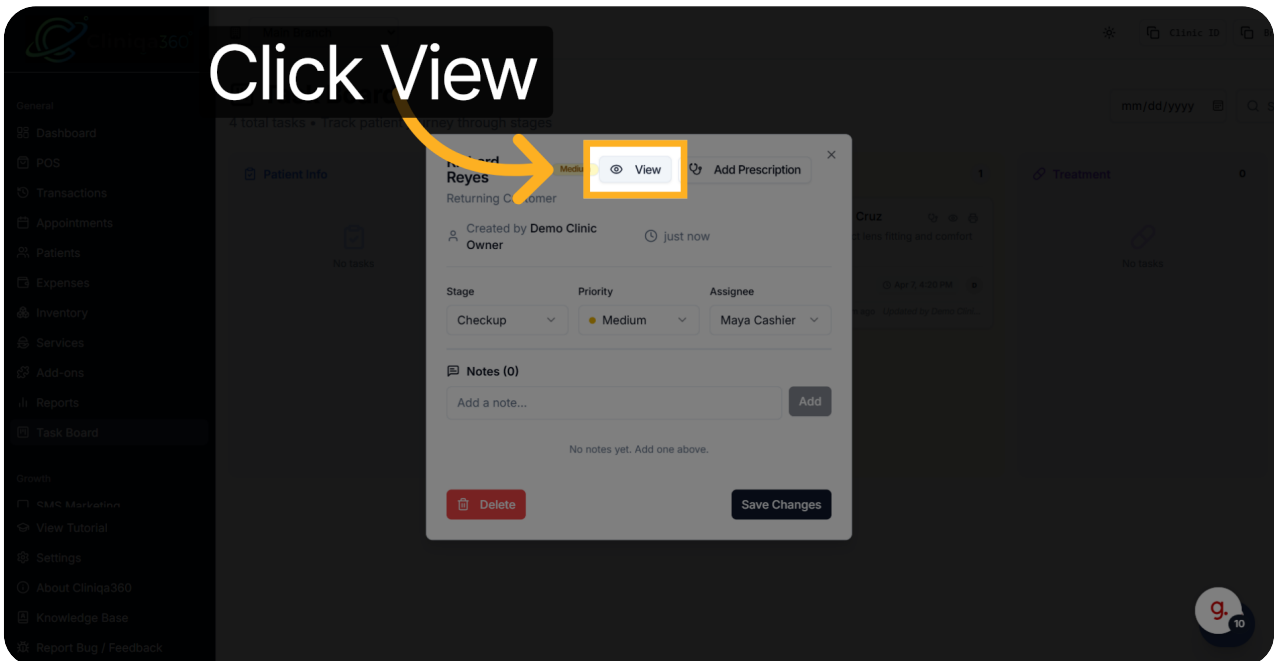
10 Select Patient Name

Click on the patient to select them for a detailed view.



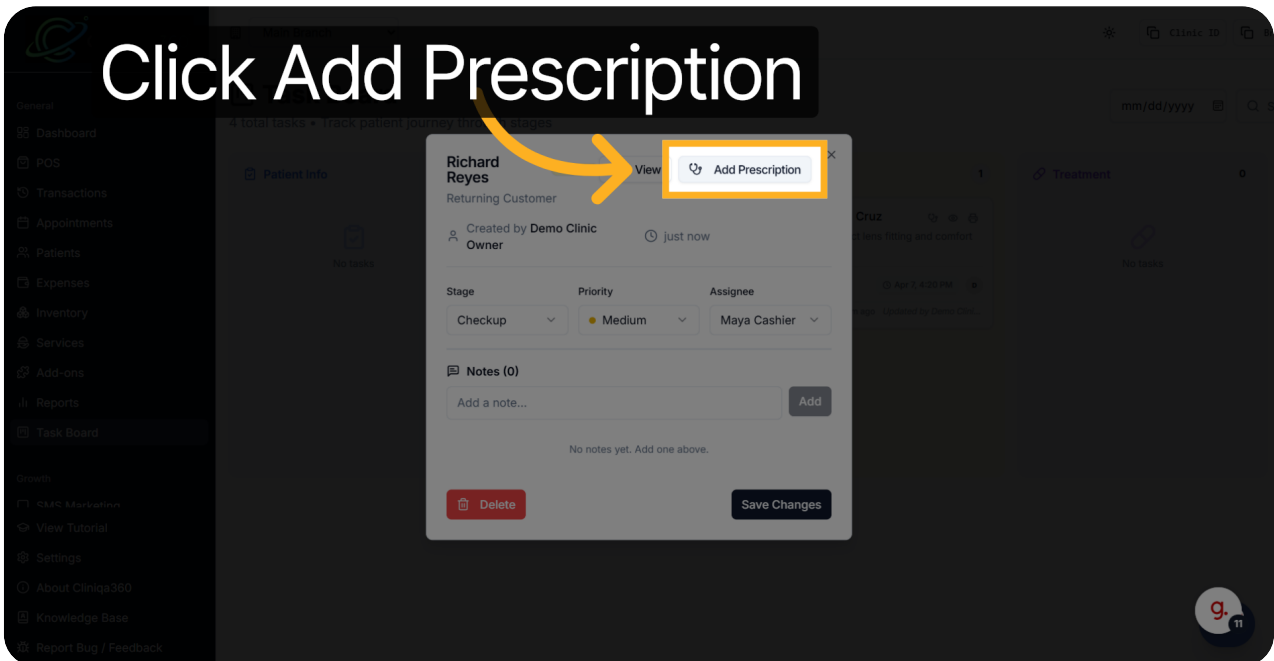
11 View Patient Information

Click "View" to display the patient's detailed information.



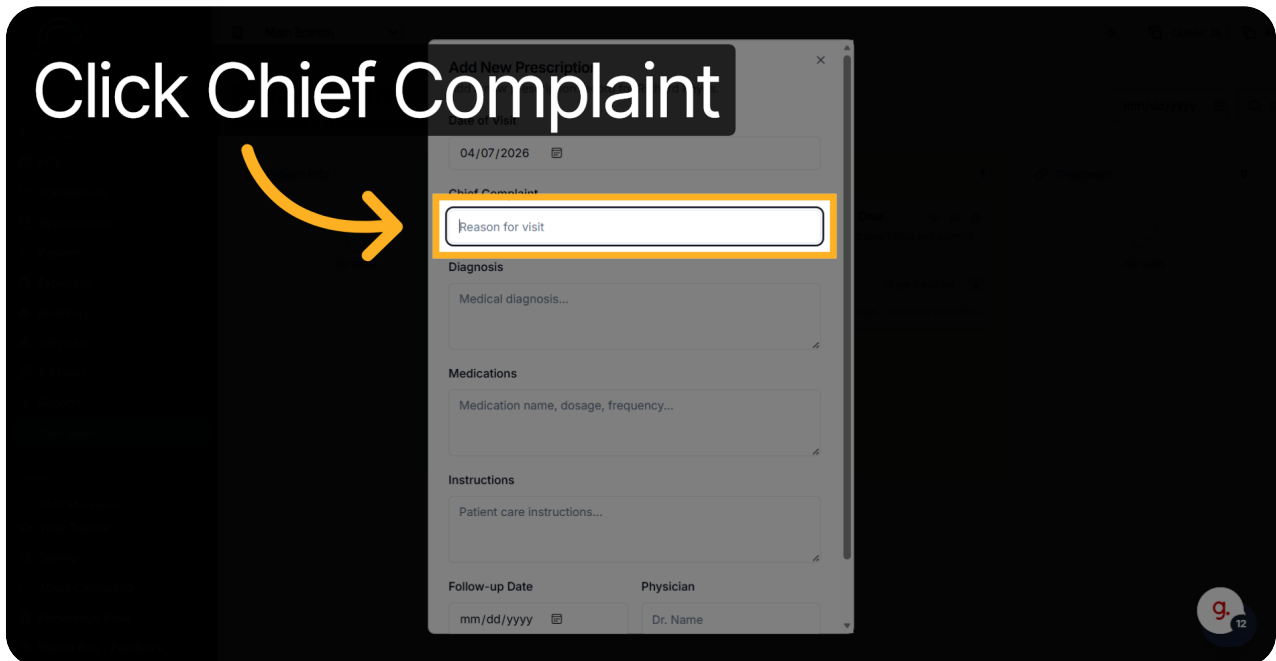
12 Add New Prescription

Click "Add Prescription" to begin entering prescription details.



13 Access Chief Complaint Field

Click on the reason to specify the patient's main concern.



14 Enter Chief Complaint

Enter "Checkup" to describe the patient's chief complaint.

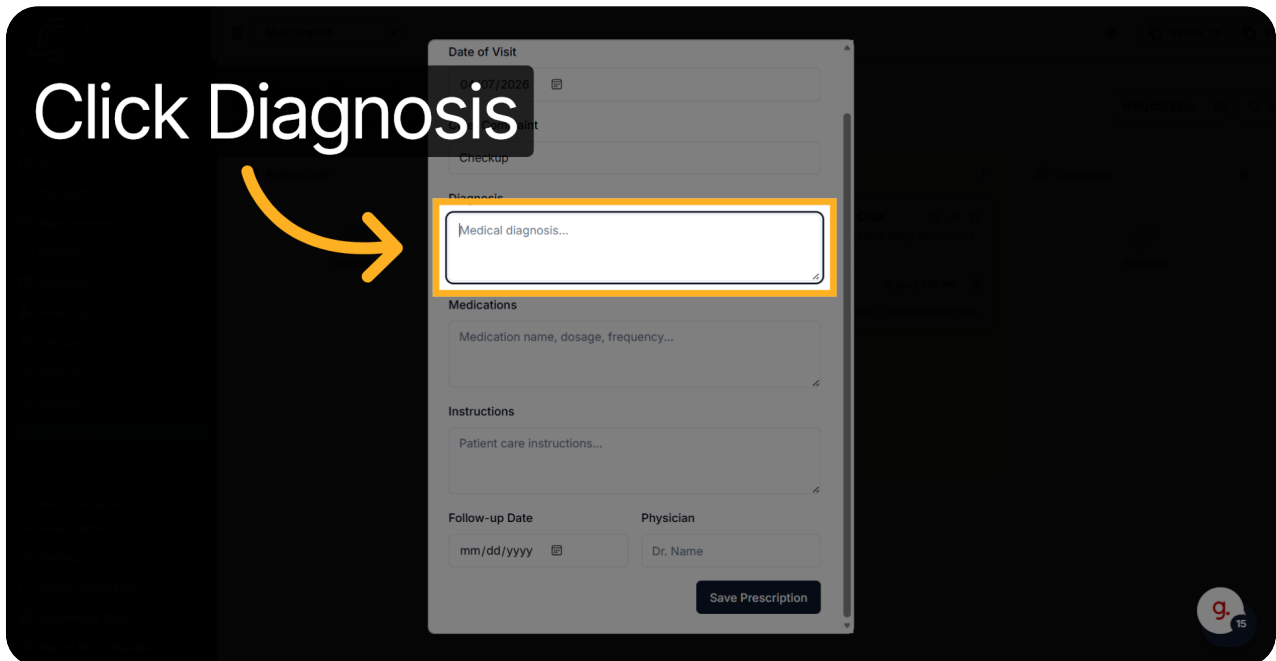
The screenshot shows a 'Task Board' on the left and a modal window titled 'Add New Prescription' for patient Richard Reyes. The form contains the following fields:

- Date of Visit:** 04/07/2026
- Chief Complaint:** Reason for visit
- Diagnosis:** Medical diagnosis...
- Medications:** Medication name, dosage, frequency...
- Instructions:** Patient care instructions...
- Follow-up Date:** mm/dd/yyyy
- Physician:** Dr. Name

A small circular logo with the letter 'g' is visible in the bottom right corner of the application window.

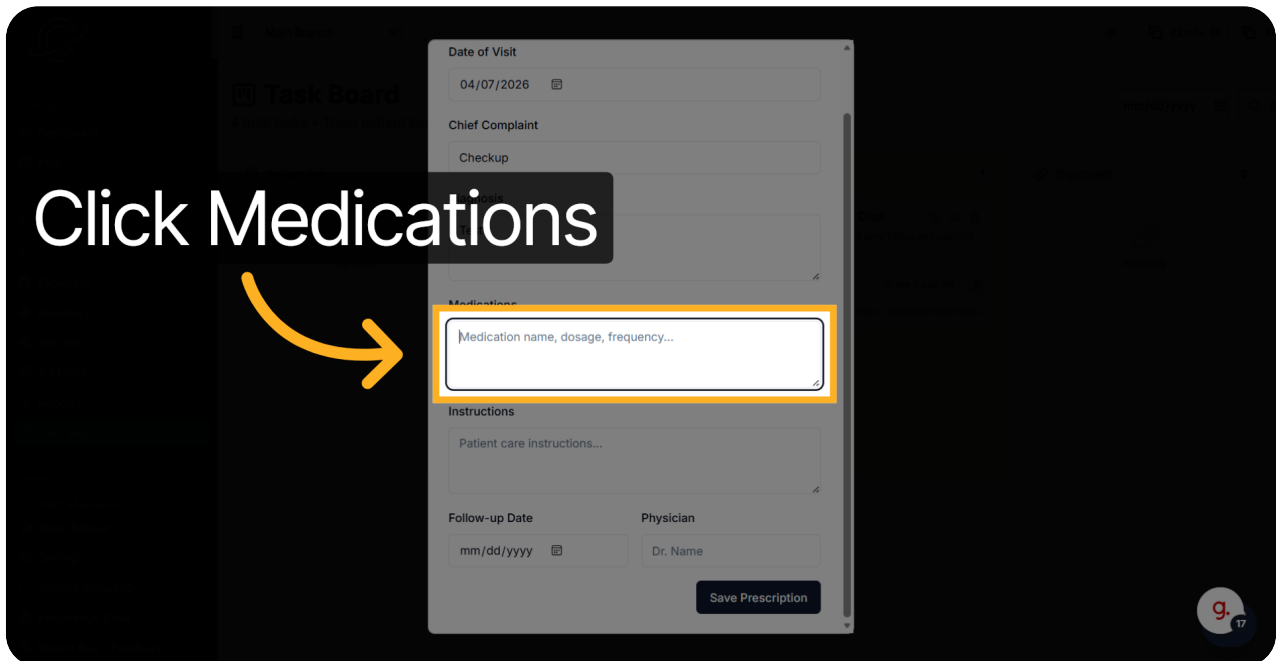
15 Access Diagnosis Field

Click "Diagnosis" to input the patient's diagnosis information.



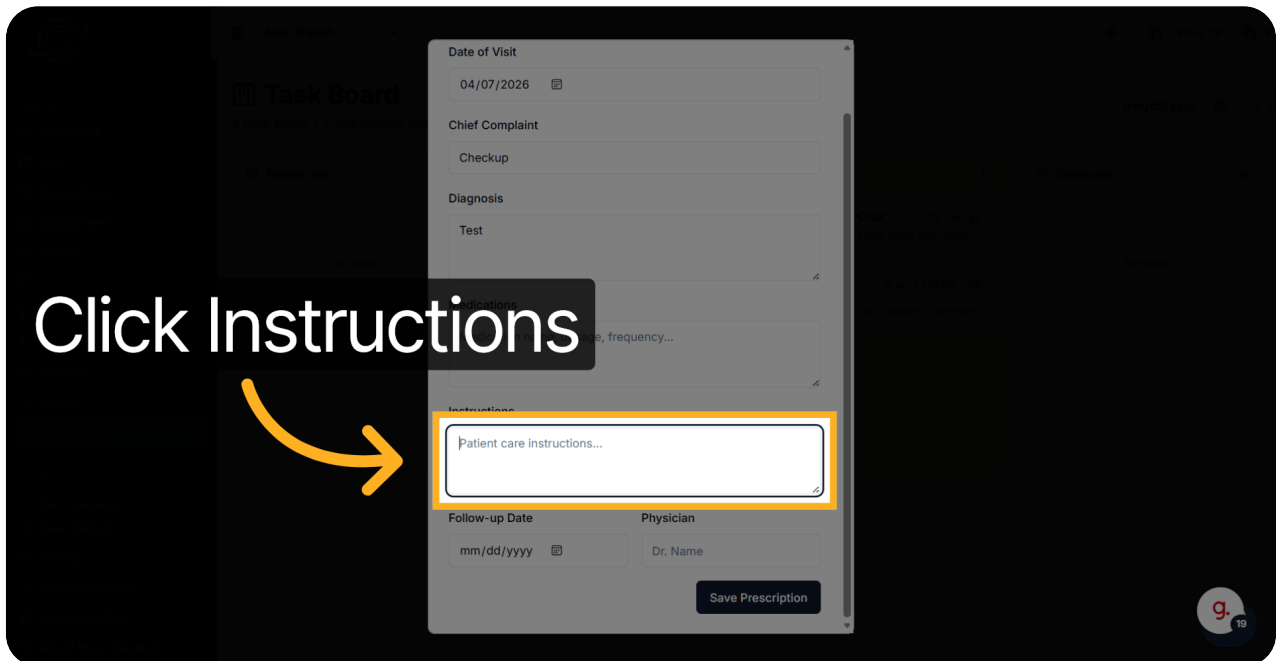
16 Open Medications Section

Click "Medications" to manage the patient's medication details.



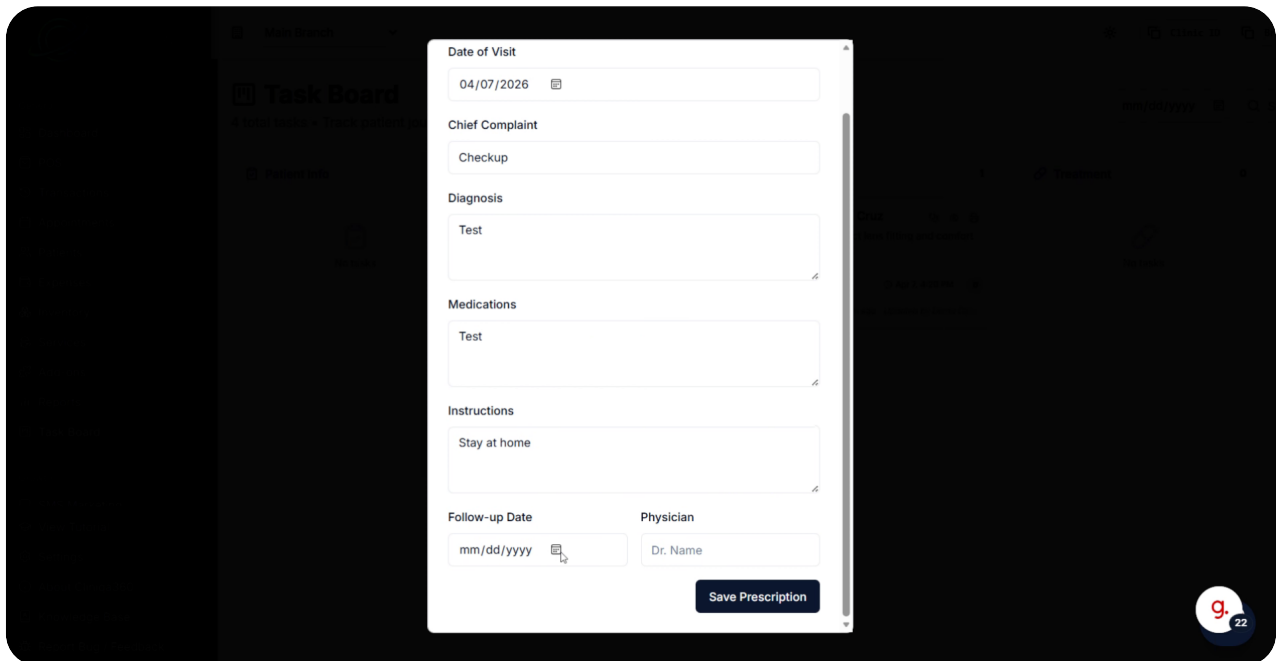
17 Access Instructions Field

Click "Instructions" to provide guidance related to the prescription.



18 Enter Follow-up Date

Please enter the date for the scheduled follow-up.



The image shows a screenshot of a medical form interface. The form is titled "Date of Visit" and contains several input fields. The "Date of Visit" field is pre-filled with "04/07/2026". Below it are fields for "Chief Complaint" (pre-filled with "Checkup"), "Diagnosis" (pre-filled with "Test"), "Medications" (pre-filled with "Test"), and "Instructions" (pre-filled with "Stay at home"). At the bottom, there are two fields: "Follow-up Date" (pre-filled with "mm/dd/yyyy") and "Physician" (pre-filled with "Dr. Name"). A "Save Prescription" button is located at the bottom right of the form. The form is displayed on a dark background with a "Task Board" label on the left.

Task Board

Date of Visit

04/07/2026

Chief Complaint

Checkup

Diagnosis

Test

Medications

Test

Instructions

Stay at home

Follow-up Date

mm/dd/yyyy

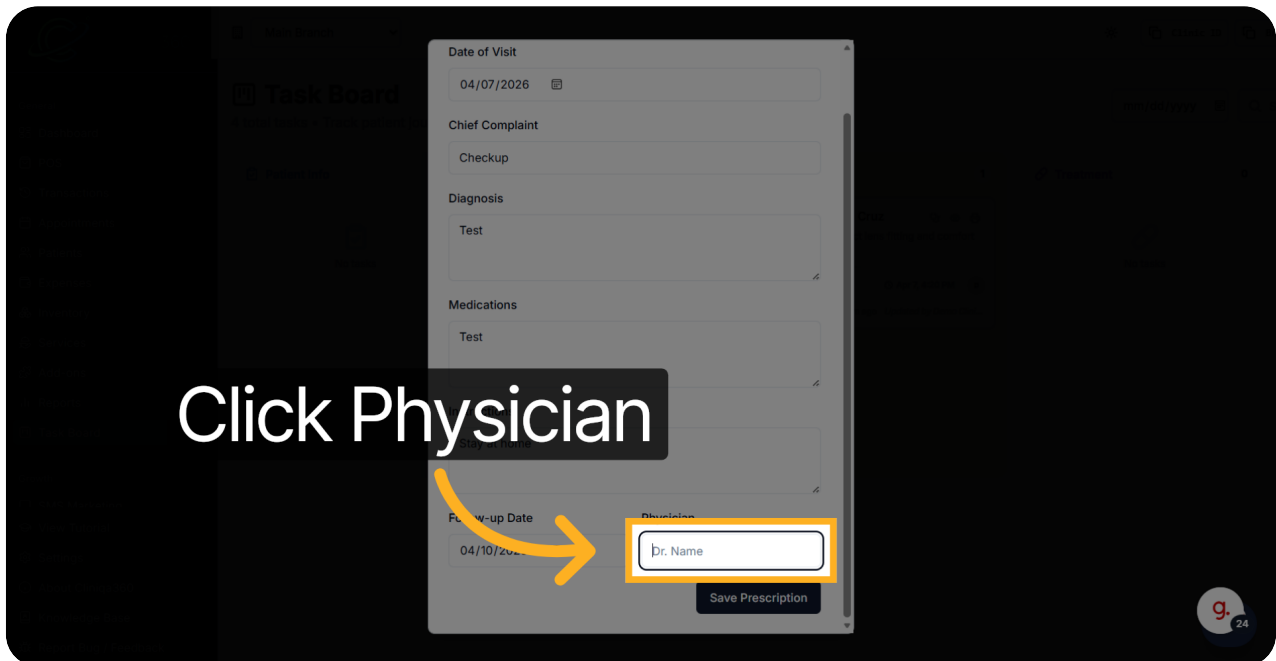
Physician

Dr. Name

Save Prescription

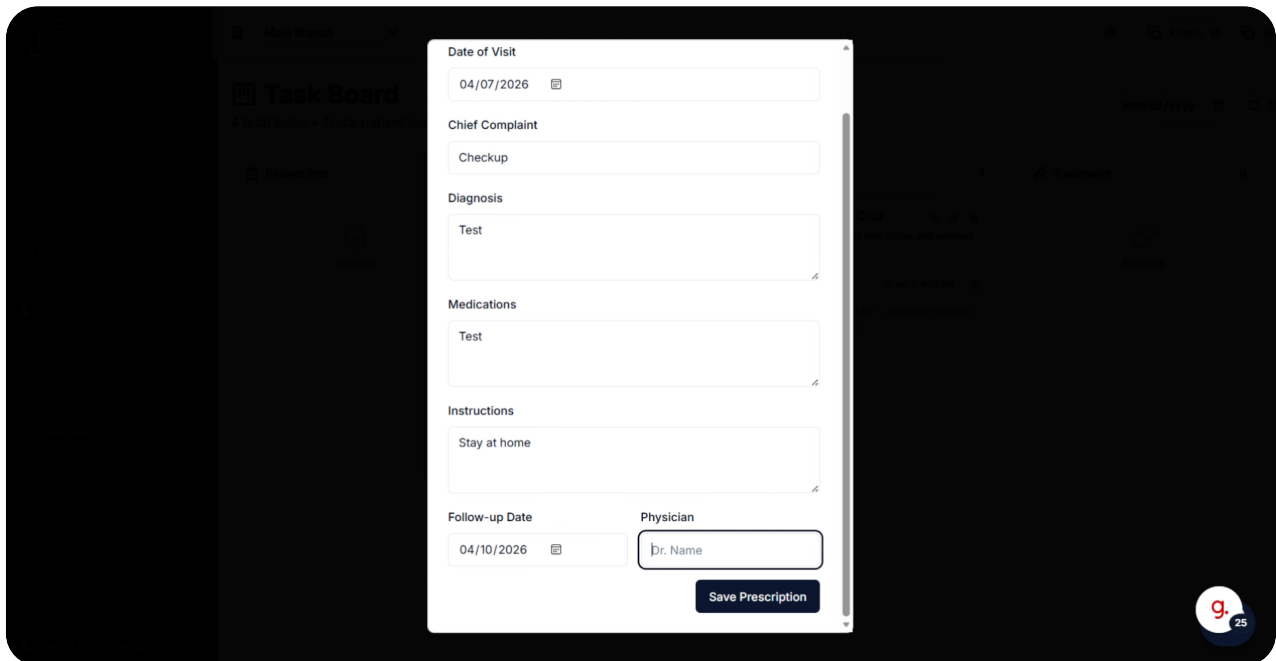
19 Access Physician Field

Click "Physician" to assign the responsible doctor for the prescription.



20 Specify Physician Name

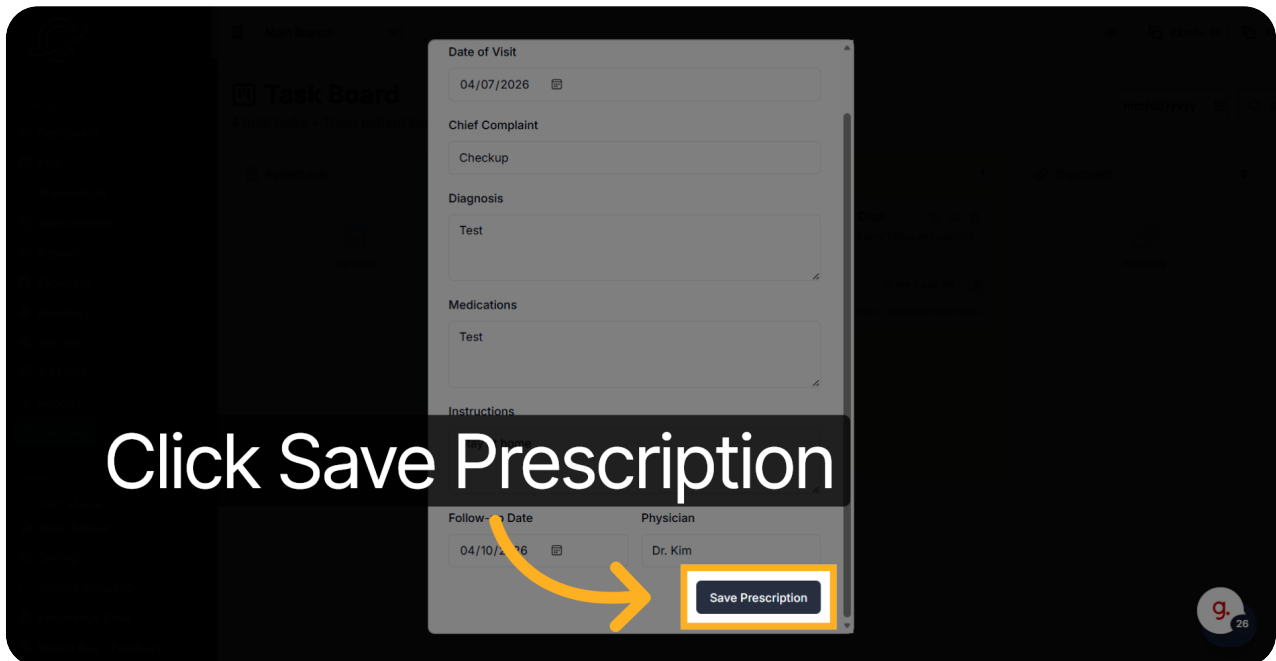
Please enter the name of the doctor who is overseeing the patient's care.



The image shows a screenshot of a medical form interface. The form is white and centered on a dark background. It contains several sections: 'Date of Visit' with a date field set to '04/07/2026'; 'Chief Complaint' with a text field containing 'Checkup'; 'Diagnosis' with a text field containing 'Test'; 'Medications' with a text field containing 'Test'; and 'Instructions' with a text field containing 'Stay at home'. At the bottom, there are two fields: 'Follow-up Date' set to '04/10/2026' and 'Physician' with a text field containing 'Dr. Name'. A blue button labeled 'Save Prescription' is located below the 'Physician' field. A 'Task Board' icon is visible on the left side of the dark background. In the bottom right corner, there is a circular logo with a red 'g' and the number '25'.

21 Save Prescription Details

Click "Save Prescription" to store the entered prescription information.



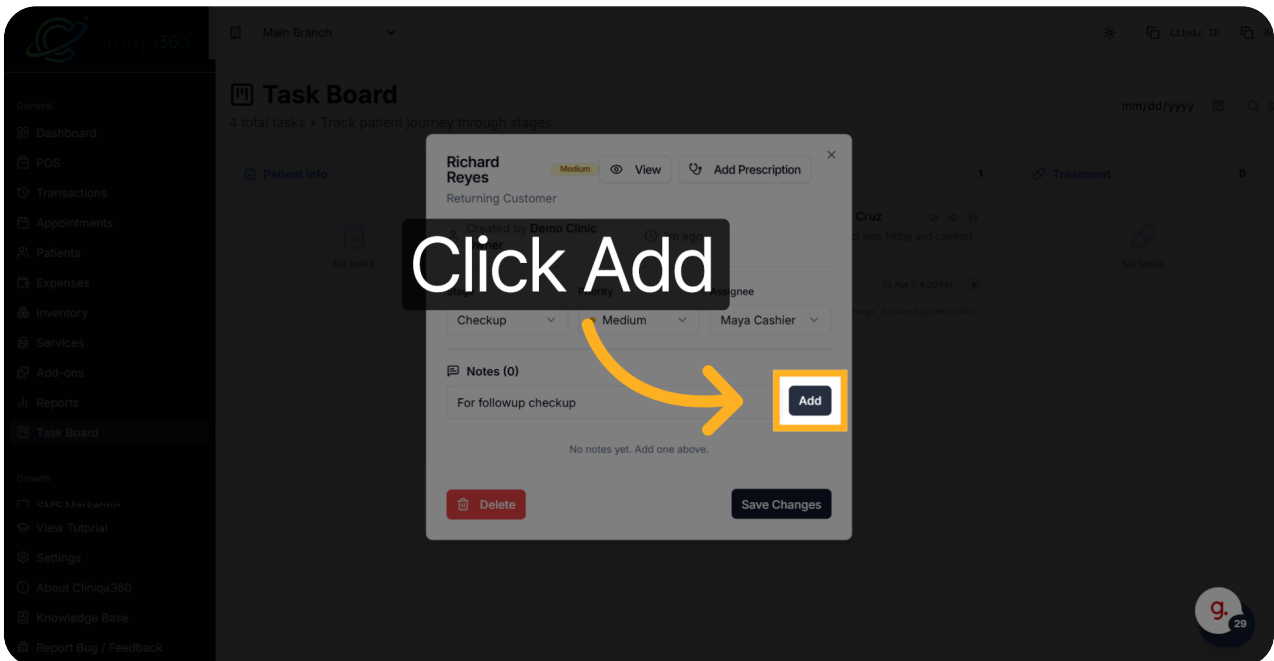
22 Add Note Field Access

Click "Add a note..." to include additional remarks about the task.

The screenshot displays a software interface with a dark theme. On the left is a sidebar menu with categories like 'General', 'Inventory', 'Reports', and 'Tools'. The main area shows a 'Task Board' for a patient named 'Richard Reyes'. A modal window is open, showing task details: 'Richard Reyes', 'Returning Customer', 'Created by Demo Clinic', 'just now', 'Checkup', 'Priority: Medium', and 'Assignee: Maya Cashier'. At the bottom of the modal is a text input field containing the placeholder text 'Add a note...'. A yellow arrow points from the left towards this input field. Below the input field are 'Delete' and 'Save Changes' buttons. A notification banner at the bottom right reads 'Prescription Added Patient record saved successfully.' with a 'g.' logo and the number '28'.

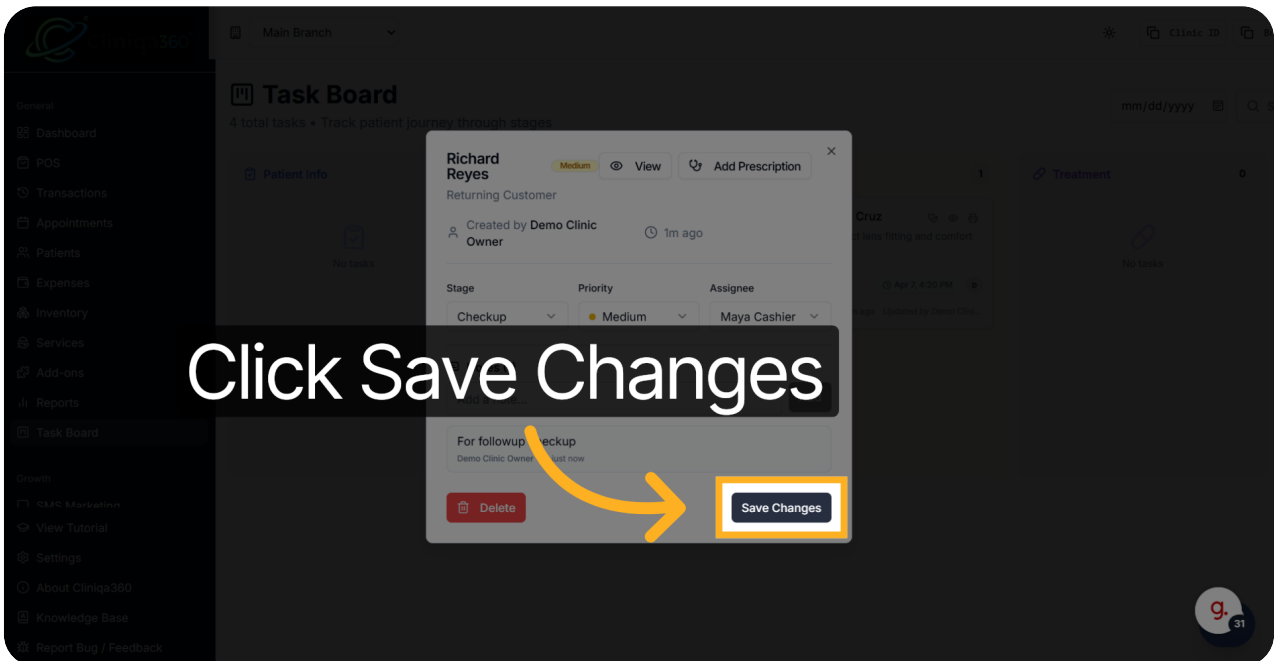
23 Add The Note

Click "Add" to attach the note to the task record.



24 Save Task Changes

Click "Save Changes" to update the task with all recent modifications.



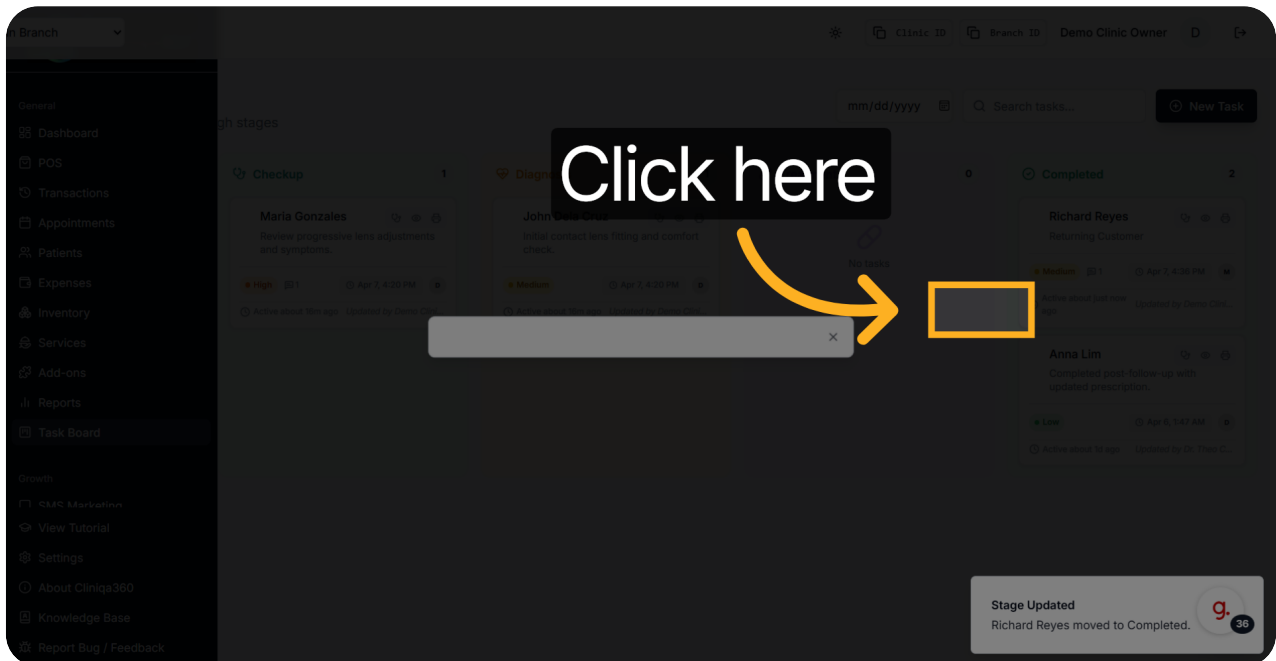
25 Access Task Again

Click "Returning Customer" once more to ensure task visibility.

The screenshot shows a task board interface with a dark sidebar on the left and a main content area. The sidebar contains various navigation items such as POS, Transactions, Appointments, Patients, Expenses, Inventory, Services, Add-ons, Reports, Task Board, Growth, CMS Marketing, View Tutorial, Settings, About Clinica360, Knowledge Base, and Report Bug / Feedback. The main content area is divided into four columns: Checkup (1 task), Diagnosis (2 tasks), Treatment (0 tasks), and Completed (1 task). The 'Checkup' column shows a task for Maria Gonzales. The 'Diagnosis' column shows two tasks: one for 'Returning Customer' (highlighted with a yellow box and an orange arrow) and one for John Dela Cruz. The 'Completed' column shows a task for Anna Lim. A 'New Task' button is located in the top right corner. A notification in the bottom right corner reads 'Stage Updated: Richard Reyes moved to Diagnosis.' with a '9' icon and a '33' badge.

26 Open Additional Options

Click here to access further task-related options.



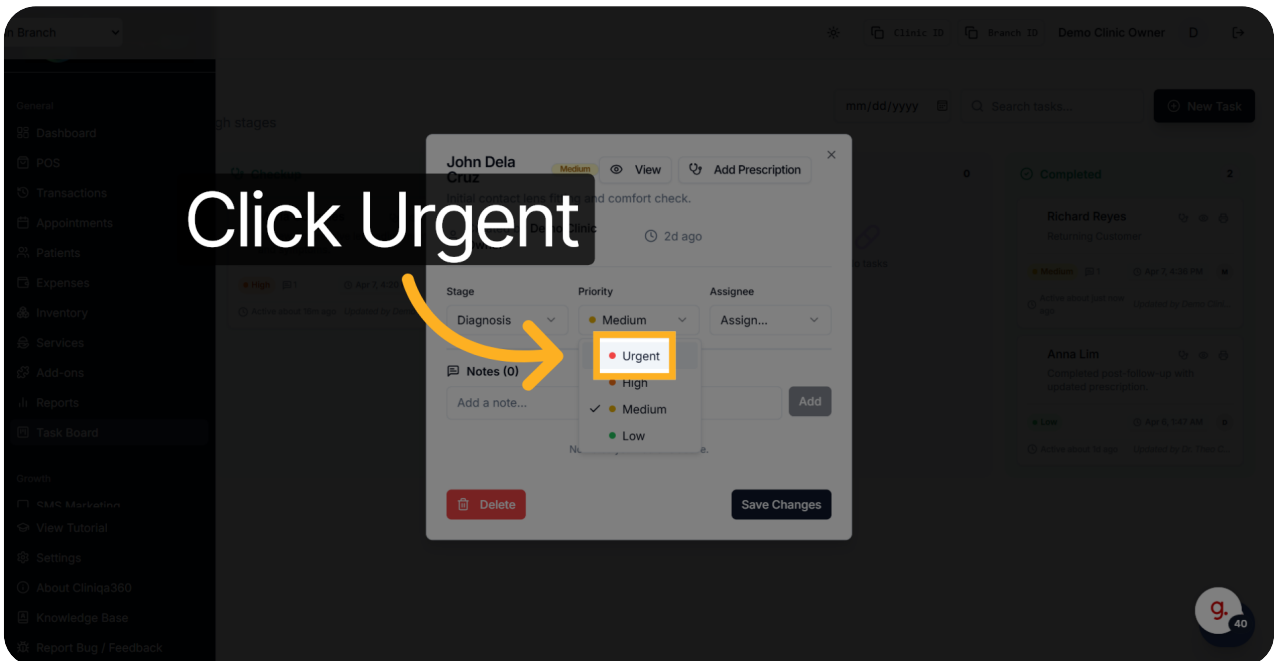
27 Select Medium Entry

Click "Medium1Apr 7, 4:36 PMM" to view the medium entry details.

The screenshot displays a task board interface with a dark sidebar on the left containing navigation options like Dashboard, POS, Transactions, Appointments, Patients, Expenses, Inventory, Services, Add-ons, Reports, Task Board, Growth, CMS Marketing, View Tutorial, Settings, About Clinica360, Knowledge Base, and Report Bug / Feedback. The main area shows a Kanban board with columns for 'Checkup' (1 task) and 'Completed' (2 tasks). The 'Checkup' column contains tasks for Maria Gonzales (High priority) and John Dela Cruz (Medium priority). The 'Completed' column contains tasks for Richard Reyes (Medium priority) and Anna Lim (Low priority). A large white text overlay 'Click Medium' is positioned over the 'Completed' column, with a yellow arrow pointing to the 'Medium' task entry for Richard Reyes. The task entry for Richard Reyes is highlighted with a yellow border and includes a 'Medium' priority indicator, a message icon, and the timestamp 'Apr 7, 4:36 PM'. A 'New Task' button is visible in the top right corner. A 'Stage Updated' notification at the bottom right indicates that Richard Reyes moved to Completed.

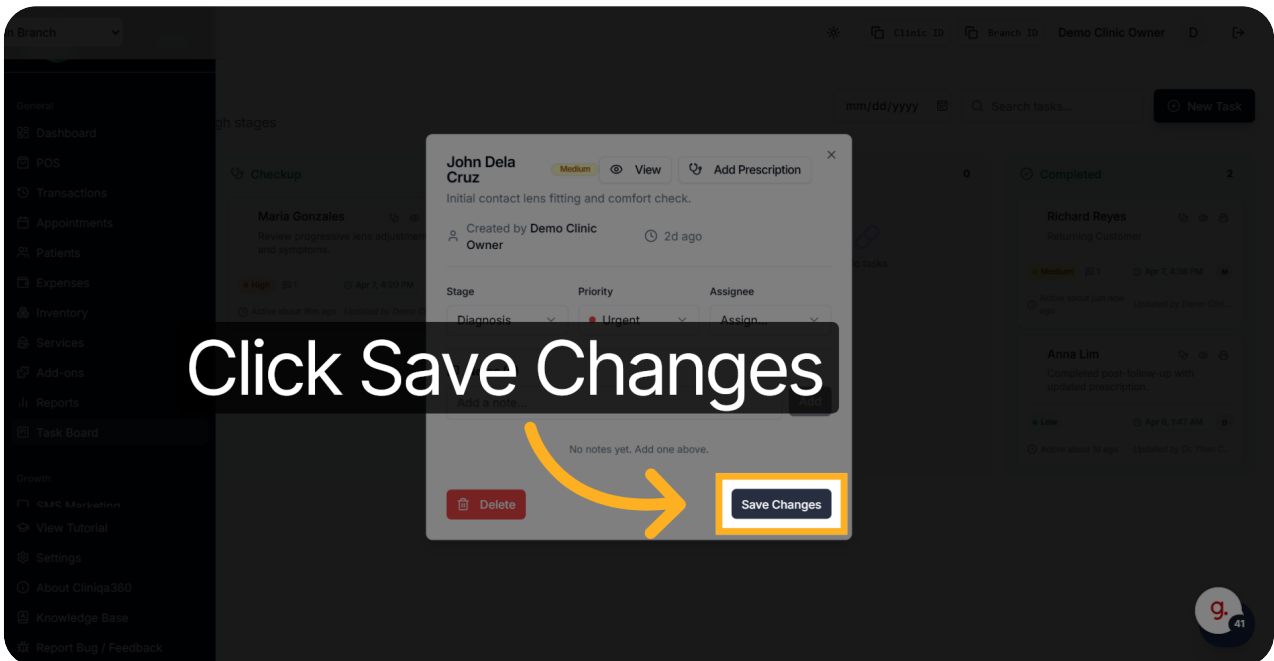
28 Mark Task Urgency

Click "Urgent" to set the task priority to urgent.



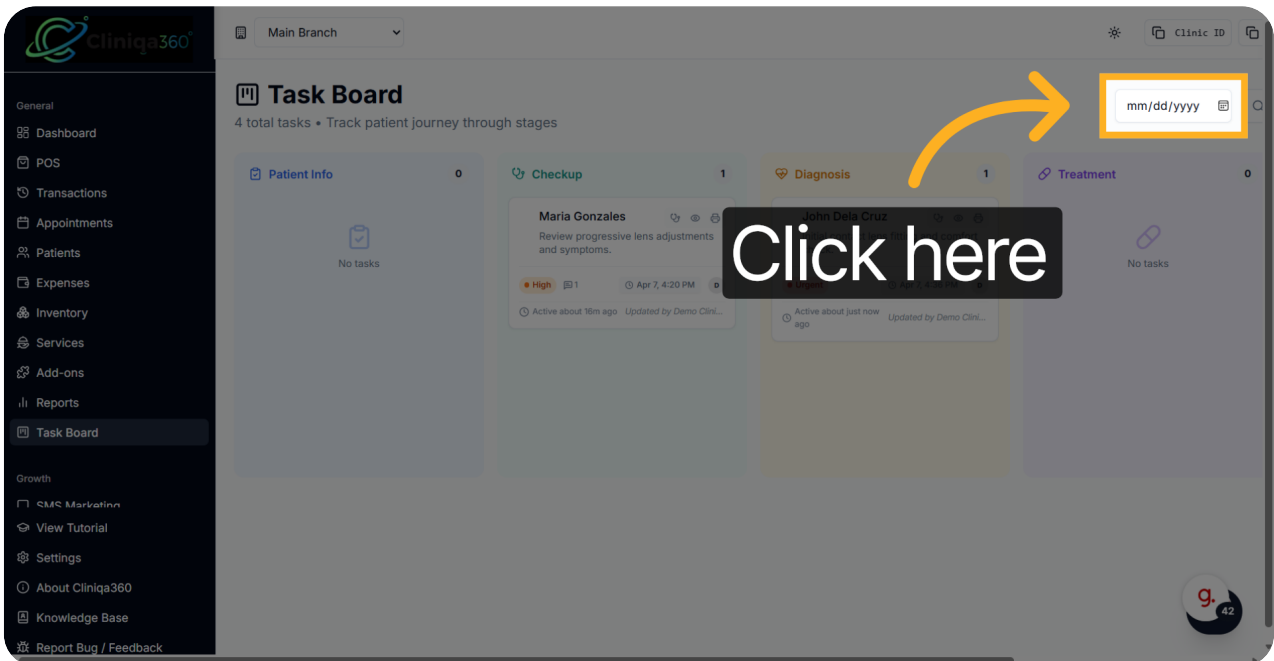
29 Save Urgency Changes

Click "Save Changes" to apply the updated urgency status.



30 Access Date Field

Click here to open the date selection field.



31 Enter Start Date

Filter tasks by date.

The screenshot displays the Cliniqua360 Task Board interface. On the left is a dark sidebar with navigation options under 'General' (Dashboard, POS, Transactions, Appointments, Patients, Expenses, Inventory, Services, Add-ons, Reports, Task Board) and 'Growth' (SMS Marketing, View Tutorial, Settings, About Cliniqua360, Knowledge Base, Report Bug / Feedback). The main area shows a 'Task Board' for 'Main Branch' with a search filter 'mm/dd/yyyy'. It contains four columns: 'Patient Info' (0 tasks), 'Checkup' (1 task for Maria Gonzales, High priority, Apr 7, 4:20 PM), 'Diagnosis' (1 task for John Dela Cruz, Urgent priority, Apr 7, 4:36 PM), and 'Treatment' (0 tasks). A notification bubble in the bottom right corner shows '9' and '42'.

You have successfully created and managed a task in the Clinica360 platform, including adding patient details, prescriptions, notes, and updating task statuses. To continue, explore advanced task management features or review patient history for comprehensive care.

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