

MeisterTask Integration

What the AI can do

Summary

MeisterTask Integration connects **MeisterTask** (project and task management platform) with **Newo Platform**.

It enables:

- Creating tasks with names, notes, and due dates via conversation
- Looking up tasks by name and reporting their status
- Updating task details (due date, notes, section)
- Marking tasks as completed
- Adding comments to existing tasks
- Listing all open tasks in a project

This integration is designed for **teams and businesses** that need to manage tasks through conversational AI without switching to a separate project management interface.

Common use cases

- When a caller reports an issue -> the AI agent creates a task in MeisterTask
- When a caller asks about a task status -> the agent looks it up and reports details
- When a caller needs to reschedule work -> the agent updates the task due date
- When a caller confirms work is done -> the agent marks the task as completed
- When a caller provides follow-up info -> the agent adds a comment to the task
- When a caller needs an overview -> the agent lists all open tasks

Features at a glance

Feature	Supported	Notes
Create task	Yes	With name, notes, due date
Look up task by name	Yes	Full task list sent to LLM for matching
Update task details	Yes	Due date, notes, section; searches by name if no ID
Complete task	Yes	Checks status before completing (prevents double-complete)
Add comment	Yes	Requires task ID from prior lookup
List open tasks	Yes	Filtered by status=open
DevMode (LLM emulation)	Yes	Emulates API responses without real MeisterTask
Multi-project support	No	Uses single default project; auto-resolves if not set
Task assignment	No	Schema extracted but not routed to API
Webhook notifications	No	No inbound webhook support

Before You Start

Before installation:

- Active **MeisterTask** account (Business or Pro plan recommended)
- **Personal Access Token** from MeisterTask API settings
- **Project ID** and **Section ID** for the target project (found in URL)

Setup

Create the Newo project

If this project already exists in **Newo Builder**, skip this subsection and continue with the integration-specific settings below.

1. In **Newo Builder**, open the projects list and click **Create Project** (or **Create New Project** from the top-right menu).



Create New Project menu in Newo Builder

2. Fill **IDN** and **Title**. The exact names do not matter; use any clear names your team will recognize.
3. In **Registry**, choose the release channel:
 - **staging** — the newest module fixes appear here first. Use it when you need the latest fix, but expect possible unfinished changes.
 - **production** — the final stable version for live projects.
4. In **Module**, select the module for this integration.



Create Project form showing IDN, Title, Registry, and Module fields 5. Leave **Module version** on **Latest**

version unless support tells you to pin a specific version, then click **Create**.

3.1 Step 1 - Generate Credentials in MeisterTask

1. Log in to your **MeisterTask** account
2. Navigate to **Account Settings -> API -> Personal Access Tokens**
3. Click **Generate New Token**
4. Copy the token and store securely (it is shown only once)
5. Note your **Project ID** from the project URL:
`https://www.meistertask.com/app/project/{PROJECT_ID}/...`
6. Note your **Section ID** by opening the project and checking network requests, or use the API: the lookup request

3.2 Step 2 - Connect in Platform

1. Open **Newo -> Projects**
2. Set the following attributes in **Builder / Attributes**:

Attribute	Required	Description
meistertask_api_key	Yes	MeisterTask personal access token (Bearer token)
meistertask_base_url	No	API base URL (default: <code>https://www.meistertask.com/api</code>)

meistertask_default_project_id	Yes	Project ID where tasks are created and listed
meistertask_default_section_id	Yes	Section (column) ID for new tasks
meistertask_mode	No	Production (default) or DevMode for LLM emulation
meistertask_setup_scenarios	No	True (default) to auto-add scenarios to canvas

3. Click **Save + Publish All**

4. On publish, the InitFlow automatically:

- Creates the `meistertask_connector` connection
- Registers 6 custom tools with ConvoAgent
- Adds task management scenarios to the canvas (if enabled)

How to use the integration

This section explains how the integration works, how to configure automation, and how to test it.

4.1 How the Integration Works

The integration operates based on **Triggers and Actions** via the event-driven system.

- A **Trigger** is a system event that starts a flow (typically from ConvoAgent detecting a user intent)
- An **Action** is the API operation performed in MeisterTask

Where to test

Testing can be done through the **Newo conversation interface** (chat or voice channel) by interacting with the agent. For testing without a real MeisterTask account, set `meistertask_mode` to `DevMode` or use a mock server.

How to test that everything works

To test the integration:

1. **Setup:** Publish the project and verify that 6 custom tools appear in `project_attributes_settings_platform_tools`
2. **Create Task:** Say "Create a task called Test task with a note test note" -> verify task appears in MeisterTask
3. **Look Up Task:** Say "Look up the task Test task" -> verify agent reports name, status, due date
4. **Update Task:** Say "Update the task Test task, change due date to next Friday" -> verify change in MeisterTask
5. **Complete Task:** Say "Mark Test task as completed" -> verify status changes to Completed
6. **Add Comment:** Say "Add a comment to Test task: This is done" -> verify comment appears
7. **List Tasks:** Say "List all open tasks" -> verify all open tasks are shown

If no action occurs:

- Ensure `meistertask_api_key` is set and valid
- Verify `meistertask_default_project_id` and `meistertask_default_section_id` are set
- Confirm all flows are published after configuration changes
- Check that custom tools are registered in `project_attributes_settings_platform_tools`
- Verify `meistertask_mode` is `Production` (not `DevMode`) for real API calls
- Check server logs for error events (`meistertask_task_error`)

Note: This integration performs real operations in MeisterTask. Changes made through the agent are reflected in the live system.

FAQ

Q: Can I use the integration without a MeisterTask account? A: Yes. Set `meistertask_mode` to `DevMode` and the integration will emulate API responses using LLM. No real tasks are created.

Q: How does the agent find tasks by name? A: The integration fetches all open tasks from the configured project and sends the full list to ConvoAgent. The LLM matches the user's request to the correct task from the list.

Q: What happens if I don't configure `project_id` and `section_id`? A: The integration will auto-resolve by fetching the first available project and its first section. This adds extra API calls and may select the wrong project if you have multiple.

Q: Can the agent update a task without knowing its ID? A: Yes. If the user refers to a task by name, the integration searches open tasks and asks the user to confirm the match before updating.

Q: What task statuses does the integration recognize? A: Open (1), Completed (2), Trashed (8), Archived (16). The complete action only works on Open tasks. Trashed and Archived tasks cannot be completed.

Q: Are completed tasks included in lookups and listings? A: No. All task queries use `?status=open` to filter only active tasks.

Q: Can I connect multiple MeisterTask projects? A: Each integration instance supports one default project. For multiple projects, create separate integration instances.