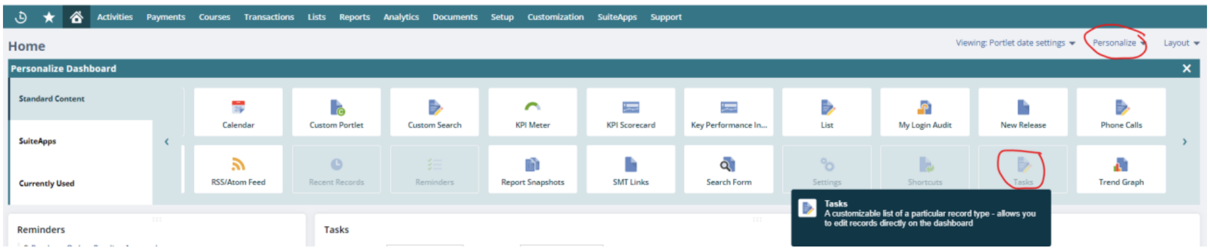
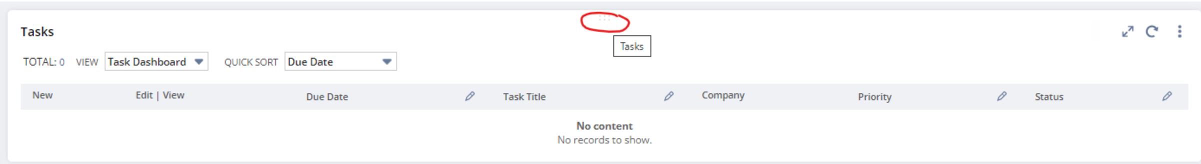
On your Home Page / Dashboard, click on Personalize link

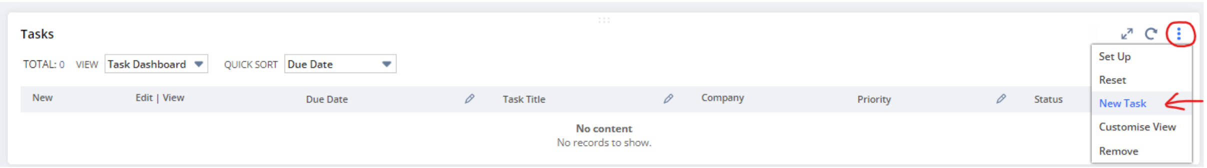
Scroll to the right of the section that opens and select the Tasks portlet, this will add the portlet to your dashboard at the top.



If this is greyed out it means the tasks portlet is already on your dashboard, find it and drop and drag it to the top (click and drag from here to move the portlet on your dashboard)



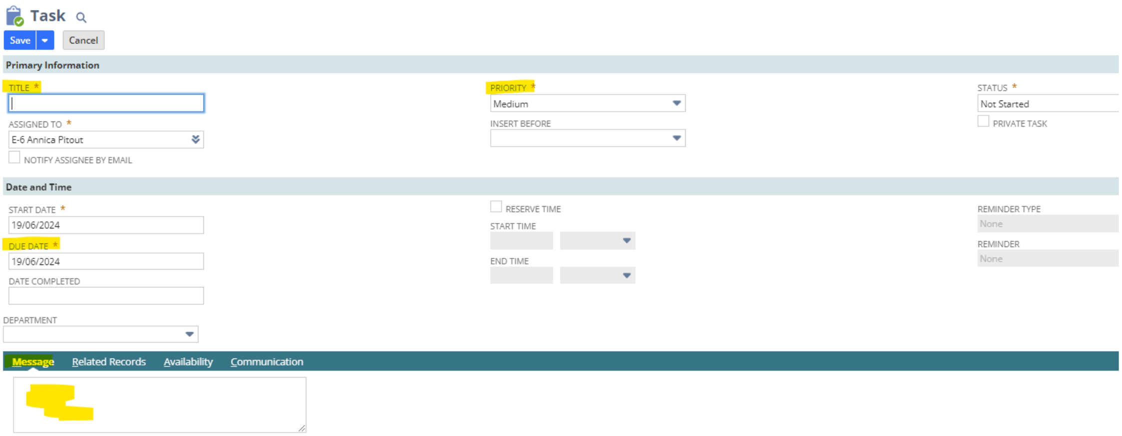
From this portlet you can add a task by hovering on the three dots on the far right corner and clicking on New Task (You can also create tasks from the opportunity, proforma or invoice or the customer record, see last page of this*)



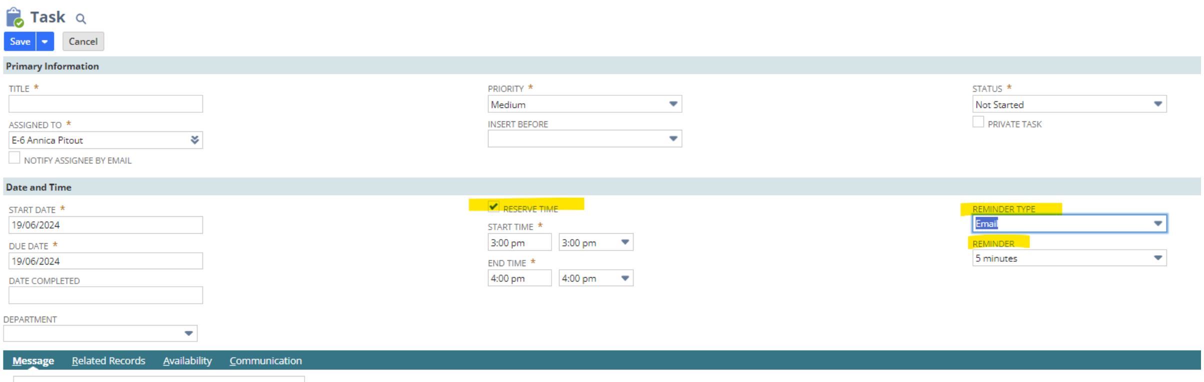
On New Task screen:

Add a descriptive title for example : *Follow up with student 123456 for payment*

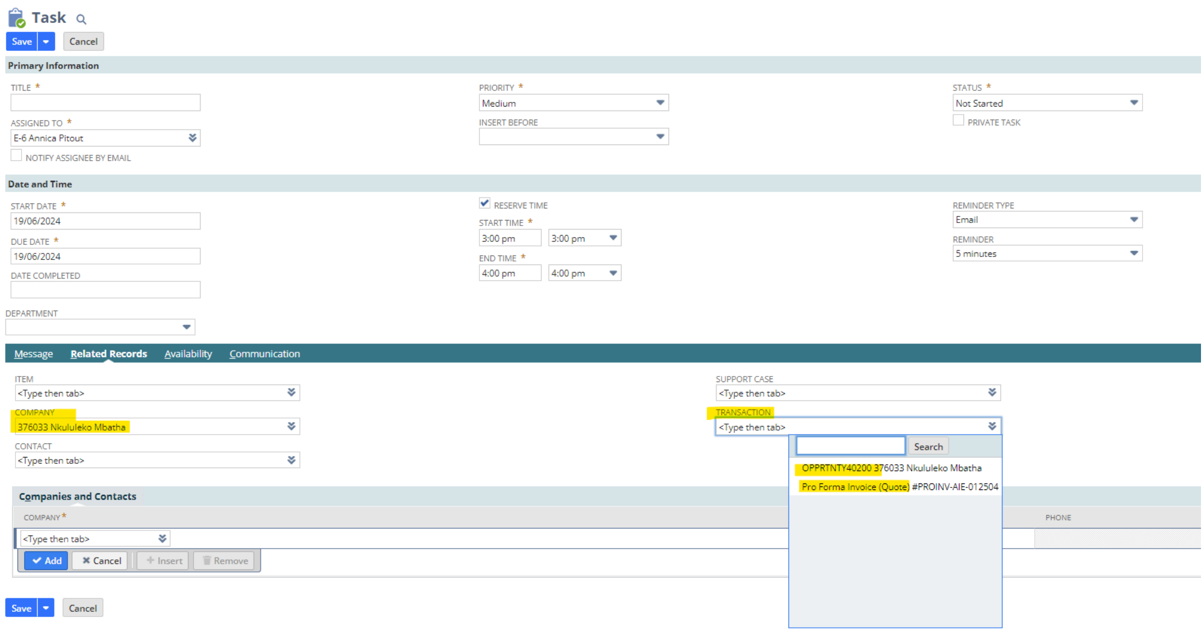
Add more information for yourself in the message box, for example if you need to follow up on payment because they said they will pay by a certain date or because you raised an invoice that they have to pay on etc.



You can also use the Reserve Time option to get an email reminder or a browser reminder at a certain date and time for your task

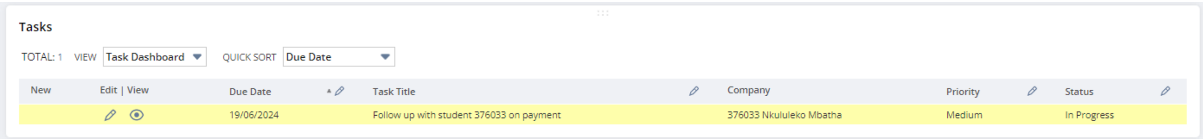


Under the related records tab you can also link the customer account in the *Company* field to easily navigate to that customer or you can link the opportunity or pro forma or invoice in the *Transaction* field.



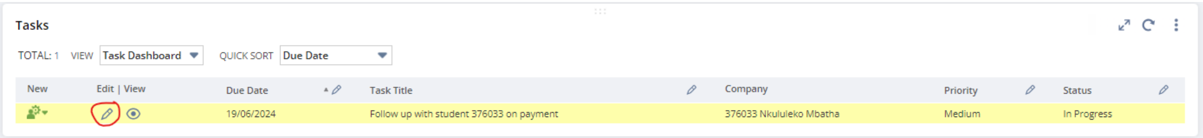
When you have completed all the fields on your task – click SAVE

On your dashboard your task will reflect as such:

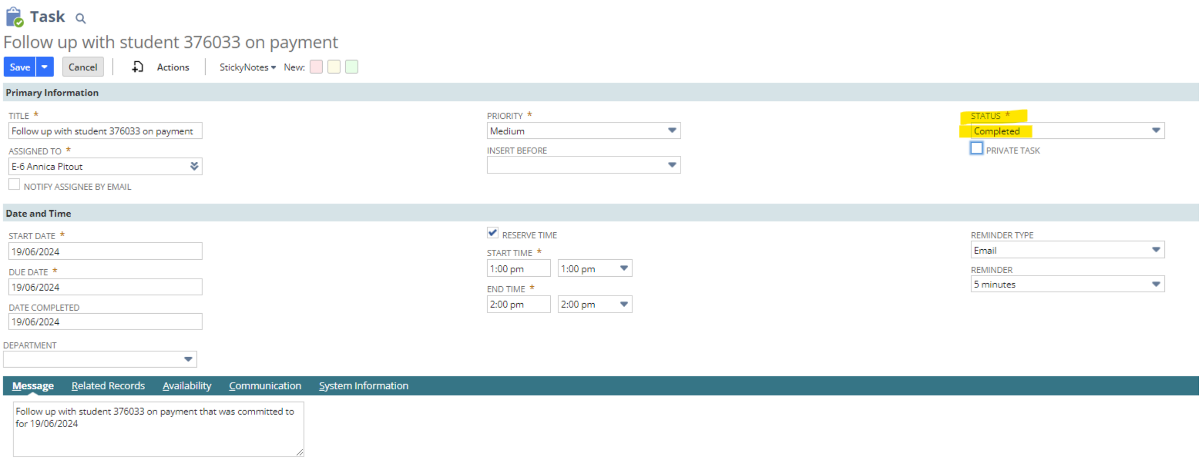


If you have **completed** your task:

Click on the pencil next to your task



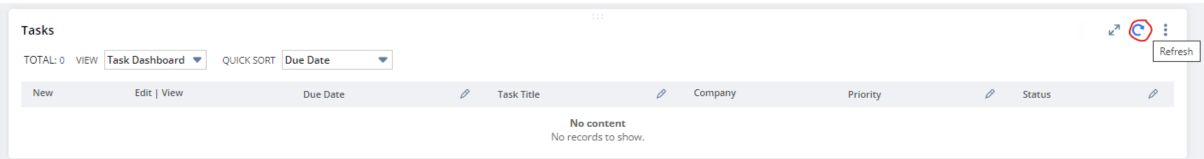
Change your Status to *Completed* (this will add a date in the *Date Completed* field)



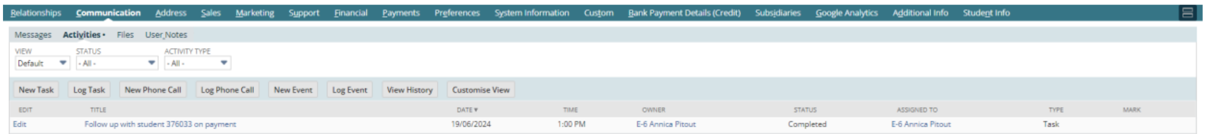
You can add additional information for yourself in the Message box if needed or you can just save.

If you have actioned your task but have not resolved it yet, you can change your due date and the time to receive another reminder, just leave your *Status* as *In Progress* until your task has been resolved.

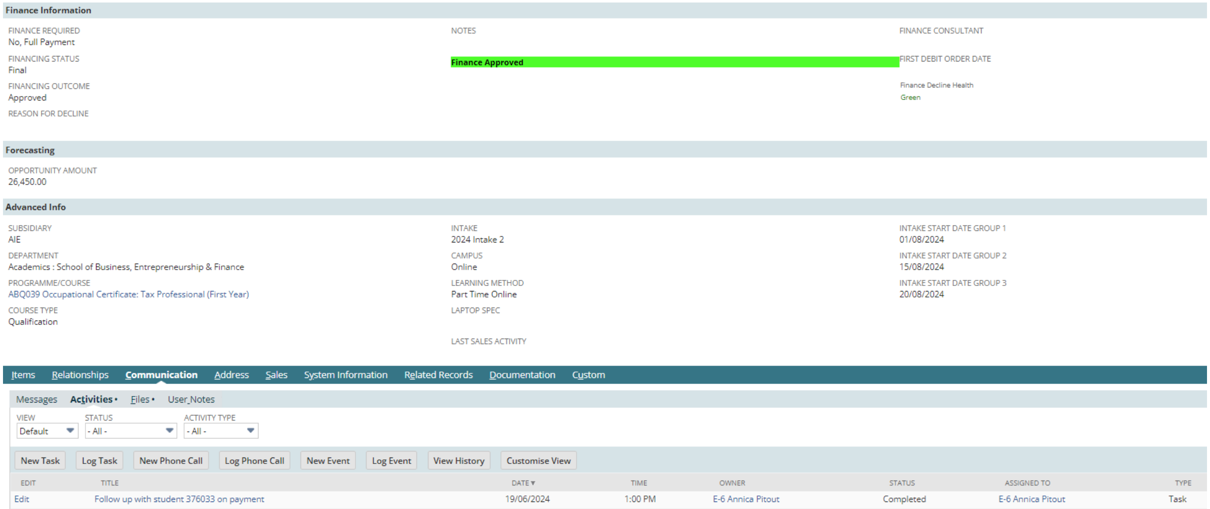
Completed tasks will no longer be listed on your dashboard (remember to click the refresh button on your portlet if your task is not reflecting or if a completed task is still showing.



Your tasks linked to customers will always be listed for history purposes on the customer record under *Communication* and *Activities*



You can also see your task on your opportunity under *Communication* and *Activities*



*On any transaction under the *Communication* and *Activities* tab you will have the option to add a **New Task** that will show up on your dashboard, so no need to always add them from the dashboard.