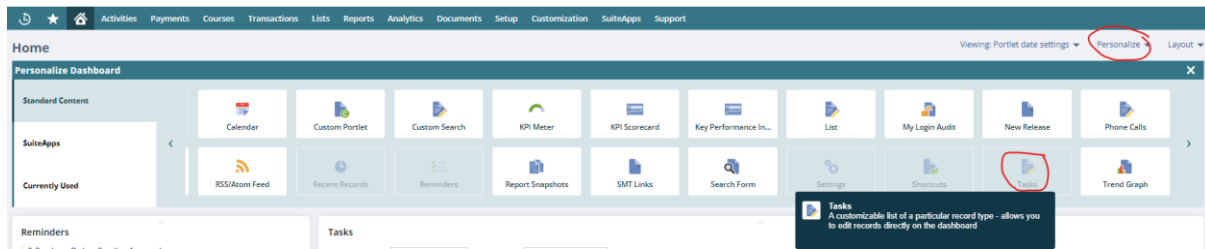
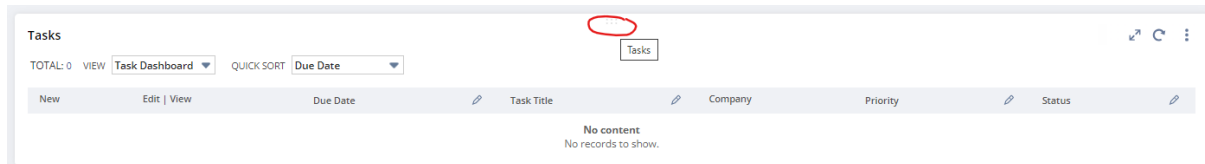


On your Home Page / Dashboard, click on Personalize link

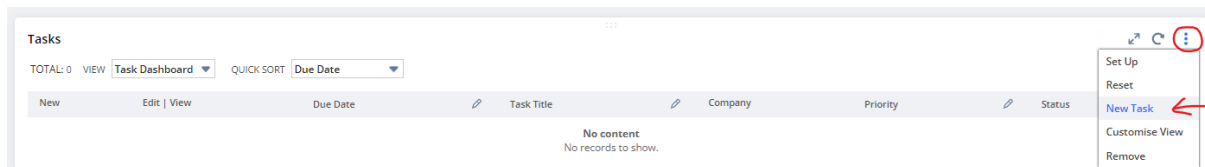
Scroll to the right of the section that opens and select the Tasks portlet, this will add the portlet to your dashboard at the top.



*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.

**Task**

**Primary Information**

TITLE \*

ASSIGNED TO \*  
E-6 Annica Pitout

NOTIFY ASSIGNEE BY EMAIL

PRIORITY \*  
Medium

INSERT BEFORE

STATUS \*  
Not Started

PRIVATE TASK

**Date and Time**

START DATE \*  
19/06/2024

DUE DATE \*  
19/06/2024

DATE COMPLETED

DEPARTMENT

RESERVE TIME

START TIME

END TIME

REMINDER TYPE  
None

REMINDER  
None

**Message** | **Related Records** | **Availability** | **Communication**

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

**Task**

**Primary Information**

TITLE \*

ASSIGNED TO \*  
E-6 Annica Pitout

NOTIFY ASSIGNEE BY EMAIL

PRIORITY \*  
Medium

INSERT BEFORE

STATUS \*  
Not Started

PRIVATE TASK

**Date and Time**

START DATE \*  
19/06/2024

DUE DATE \*  
19/06/2024

DATE COMPLETED

DEPARTMENT

RESERVE TIME

START TIME \*  
3:00 pm

END TIME \*  
4:00 pm

REMINDER TYPE  
Email

REMINDER  
5 minutes

**Message** | **Related Records** | **Availability** | **Communication**

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.

**Task**

**Primary Information**

TITLE \*

ASSIGNED TO \*  
E-6 Annica Pitout

NOTIFY ASSIGNEE BY EMAIL

PRIORITY \*  
Medium

INSERT BEFORE

STATUS \*  
Not Started

PRIVATE TASK

**Date and Time**

START DATE \*  
19/06/2024

DUE DATE \*  
19/06/2024

DATE COMPLETED

DEPARTMENT

RESERVE TIME

START TIME \*  
3:00 pm

END TIME \*  
4:00 pm

REMINDER TYPE  
Email

REMINDER  
5 minutes

**Message** | **Related Records** | **Availability** | **Communication**

ITEM

SUPPORT CASE

COMPANY \*  
376033 Nkululeko Mbetha

TRANSACTION \*

CONTACT

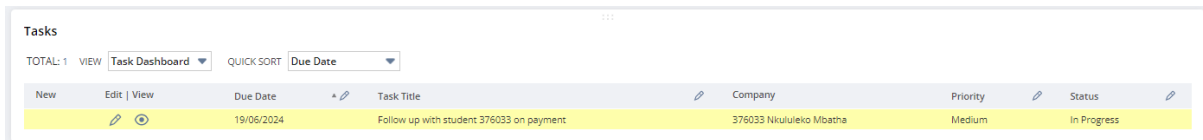
**Companies and Contacts**

COMPANY \*  
<Type then tab>

SEARCH RESULTS:  
OPPRNTY40200 376033 Nkululeko Mbetha  
Pro Forma Invoice (Quote) #PROINV-AIE-012504

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

On your dashboard your task will reflect as such:

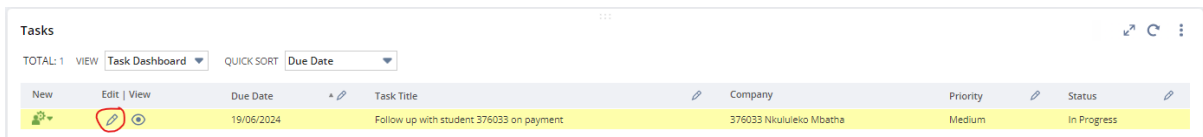


The screenshot shows a 'Tasks' portlet with a table containing one task. The task is 'Follow up with student 376033 on payment', assigned to '376033 Nikululeko Mbatha', with a 'Medium' priority and 'In Progress' status. The due date is '19/06/2024'. A pencil icon is visible next to the task title.

New	Edit   View	Due Date	Task Title	Company	Priority	Status
		19/06/2024	Follow up with student 376033 on payment	376033 Nikululeko Mbatha	Medium	In Progress

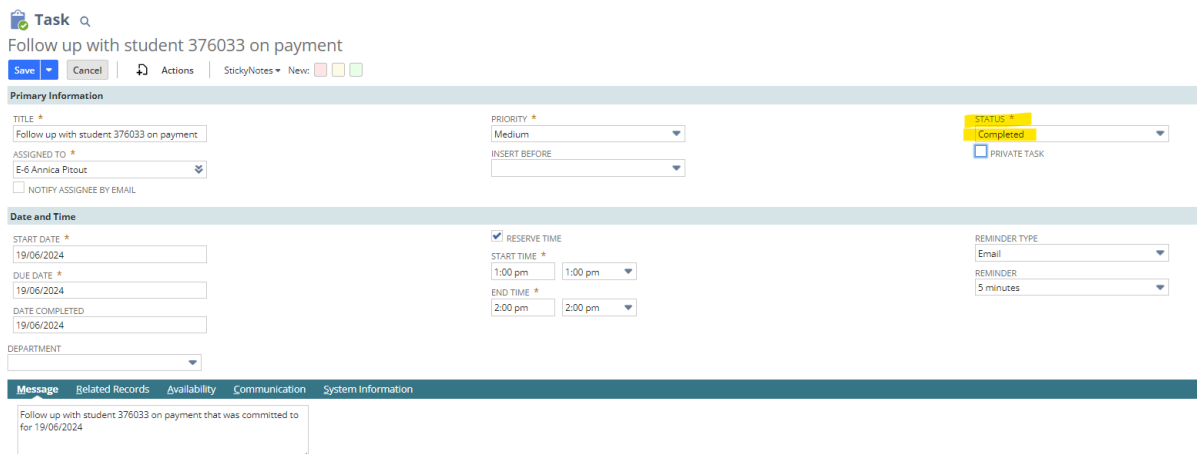
If you have **completed** your task:

Click on the pencil next to your task



The screenshot shows the same task dashboard as before, but the pencil icon next to the task title is circled in red, indicating it should be clicked to edit the task.

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

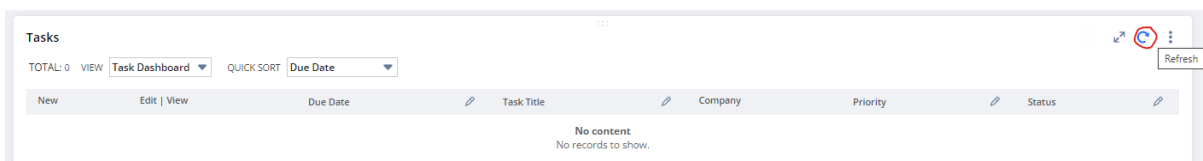


The screenshot shows the 'Task' edit form. The 'Status' dropdown menu is highlighted in yellow and set to 'Completed'. Other fields include 'Title' (Follow up with student 376033 on payment), 'Assigned to' (E-6 Annica Pitout), 'Priority' (Medium), 'Start Date' (19/06/2024), 'Due Date' (19/06/2024), 'Date Completed' (19/06/2024), 'Reserve Time' (checked), 'Start Time' (1:00 pm), 'End Time' (2:00 pm), 'Reminder Type' (Email), and 'Reminder' (5 minutes). A 'Message' box at the bottom contains the text: 'Follow up with student 376033 on payment that was committed to for 19/06/2024'.

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).



The screenshot shows the 'Tasks' portlet with 'TOTAL: 0' and 'No records to show.' displayed. A 'Refresh' button is visible in the top right corner.

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

EDIT	TITLE	DATE ▼	TIME	OWNER	STATUS	ASSIGNED TO	TYPE	MARK
Edit	Follow up with student 376033 on payment	19/06/2024	1:00 PM	E-6 Annica Pitout	Completed	E-6 Annica Pitout	Task	

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

FINANCE REQUIRED	NOTES	FINANCE CONSULTANT
No, Full Payment		
FINANCING STATUS Final	<b>Finance Approved</b>	FIRST DEBIT ORDER DATE
FINANCING OUTCOME Approved		Finance Decline Health Green
REASON FOR DECLINE		

OPPORTUNITY AMOUNT
26,450.00

SUBSIDIARY	INTAKE	INTAKE START DATE GROUP 1
AIE	2024 Intake 2	01/08/2024
DEPARTMENT	CAMPUS	INTAKE START DATE GROUP 2
Academics : School of Business, Entrepreneurship & Finance	Online	15/08/2024
PROGRAMME/COURSE	LEARNING METHOD	INTAKE START DATE GROUP 3
ABQ039 Occupational Certificate: Tax Professional (First Year)	Part Time Online	20/08/2024
COURSE TYPE	LAPTOP SPEC	
Qualification		
	LAST SALES ACTIVITY	

EDIT	TITLE	DATE ▼	TIME	OWNER	STATUS	ASSIGNED TO	TYPE
Edit	Follow up with student 376033 on payment	19/06/2024	1:00 PM	E-6 Annica Pitout	Completed	E-6 Annica Pitout	Task

\*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.

FINANCE REQUIRED	NOTES	FINANCE CONSULTANT
No, Full Payment		
FINANCING STATUS Final	<b>Finance Approved</b>	FIRST DEBIT ORDER DATE
FINANCING OUTCOME Approved		Finance Decline Health Green
REASON FOR DECLINE		

OPPORTUNITY AMOUNT
26,450.00

SUBSIDIARY	INTAKE	INTAKE START DATE GROUP
AIE	2024 Intake 2	01/08/2024
DEPARTMENT	CAMPUS	INTAKE START DATE GROUP
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COURSE TYPE	LAPTOP SPEC	
Qualification		
	LAST SALES ACTIVITY	

EDIT	TITLE	DATE ▼	TIME	OWNER	STATUS