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.

🕒 ★ 쓥 Activities	Payments	Courses Transaction	s Lists Reports	Analytics Documents	Setup Customization	a SuiteApps Suppo	rt				\sim	
Home									View	ring: Portlet date settings	Personalize	Layout 👻
Personalize Dashboard												×
Standard Content			6	Þ	<u>^</u>			Þ			Þ	
SuiteApps		Calendar	Custom Portlet	Custom Search	KPI Meter	KPI Scorecard	Key Performance In	List	My Login Audit	New Kelease	Phone Calls	,
		2	o		D.	- h	q		lb.		a	
Currently Used		RSS/Atom Feed	Recent Records	Reminders	Report Snapshots	SMT Links	Search Form	Settings	Shortcuts	Tasks	Trend Graph	
								Tasks A customizab	le list of a particular record	type - allows you		
Reminders			Tasks					to edit record	s directly on the dashboard			

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)

Tasks	IEW Task Dashboard 🔻	QUICK SORT Due Date			Tasks					⊭ [≉] C' :
New	Edit View	Due Date	Ø	Task Title	Ø	Company	Priority	Ø	Status	Ø
				Nor	No content records to show.					

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*)

Tasks TOTAL: 0 VIEV	V Task Dashboard 💌	QUICK SORT Due Date									k [≉] C : Set Up Reset
New	Edit View	Due Date	Ø	Task Title		Ø	Company	Priority	Ø	Status	New Task
					No content						Customise View
				١	lo records to show.						Remove

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 🔍		
Save - Cancel		
Primary Information		
ITTLE	Medum INSERT BEFORE	STATUS * Not Started PRIVATE TASK
Date and Time		
START DATE * 1990/50204 Div Dove = 1990/50204 DATE COMPLETED DePARTMENT		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 Q Save Cancel		
Primary Information		
TITLE * ASSIGNED TO * E-6 Annica Pitout:	PRIORITY * STATUS * Not Started * PRIVATE TASK	•
Date and Time		
START DATE * 19/06/2024 DUE DATE * 19/06/2024 DATE COMPLETED	✓ ISSENCE TIME ISSENCE ISSENCE SART TIME * 3:00 pm 3:00 pm ISSENCE ISSENCE ISSENCE BOD TIME * 4:00 pm 4:00 pm ISSENCE ISSENCE ISSENCE	•
DEPARTMENT Message <u>R</u> elated Records <u>A</u> vailability	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 🔍			
Save - Cancel			
Primary Information			
TITLE * ASSIGNED TO * E-6 Annica Pitout NOTHY ASSIGNEE BY EMAIL	Nederry * Medium T INSERT BEFORE	STATUS * Not Started PRIVATE	▼. ASK
Date and Time			
START DATE * 1906/2024 URE NTE * 1906/2024 DATE COMPLETED	RESERVE TIME START TIME * 300 pm 100 0pm 400 pm 400 pm	REMINDER T Email REMINDER 5 minutes	PE V
DEPARTMENT			
ITEM <type tab="" then=""></type>	SUPPORT CASE <type tab="" then=""></type>	*	
376033 Nuclulieko Mbatha 😻 CONTACT <type tab="" then=""></type>	<type tab="" then=""></type>	Search OPPRTNTY40200 376033 Nkululeko Mbatha	
Companies and Contacts		Pro Forma Invoice (Quote) #PROINV-AIE-012504	
Companies and Contacts COMPANY [®] <type tab="" then=""> <pre></pre></type>		-	PHONE
Save Cancel			

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

On your dashboard your task will reflect as such:

Tasks										
TOTAL: 1	VIEW Task Dashboard 💌	QUICK SORT Due I	Date	•						
New	Edit View	Due Date	* 0	Task Title	Ø	Company	Priority	Ø	Status	Ø
	Ø 💿	19/06/2024		Follow up with student 376033 on payment		376033 Nkululeko Mbatha	Medium		In Progress	

If you have **completed** your task:

Click on the pencil next to your task

Tasks										R _i	° C :
TOTAL: 1	VIEW Task Dashboard 🔻	QUICK SORT Due Dat	te	▼							
New	Edit View	Due Date	• 0	Task Title	6	0	Company	Priority	0	Status	0
2 ⁰ *	۲	19/06/2024		Follow up with student 376033 on payment			376033 Nkululeko Mbatha	Medium		In Progress	

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

Task Q Follow up with student 376033 on payment Sweet Cancel Actions StudyNotes • New:		
Primary Information TITLE * Follow up with student 376033 on payment ASSIGNED TO * E-6 Annica Pitoue Image: Strate Control of Strate	PRICRITY * Medium ♥ INSERT BEFORE ♥	Completed
Date and Time START DATE * 19/06/2024 DUE DATE * 19/06/2024 DATE COMPLETED 19/06/2024 DEPARTMENT	RESERVE TIME START TIME * 1:00 pm END TIME * 200 pm 200 pm 200 pm	REMINDER TYPE Email REMINDER 5 minutes
Message Belated Records Availability Communication System Information 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.

Tasks	W Task Dashboard 💌	QUICK SORT Due Date								⊮" C : Refresh
New	Edit View	Due Date	Ø	Task Title	0	Company	Priority	0	Status	Ø
					No content No records to show.					

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

Finance Information				
FINANCE REQUIRED No, Full Payment	NOTES		FINANCE CONSULTANT	
FINANCING STATUS Final	Finance Approved		FIRST DEBIT ORDER DATE	
FINANCING OUTCOME Approved			Finance Decline Health Green	
REASON FOR DECLINE				
Forecasting				
OPPORTUNITY AMOUNT 26,450.00				
Advanced Info				
SUBSIDIARY AIE DEPARTMENT Academics - School of Business Entreoreneurshin & Einance	INTAKE 2024 Intake 2 CAMPUS Online		INTAKE START DATE GROUP 1 01/08/2024 INTAKE START DATE GROUP 2 15/08/0704	
PROGRAMME/COURSE ABQ039 Occupational Certificate: Tax Professional (First Year)	LEARNING METHOD Part Time Online		INTAKE START DATE GROUP 3 20/08/2024	
COURSE TYPE Qualification	LAPTOP SPEC			
	LAST SALES ACTIVITY			
Items Relationships Communication Address Sales	System Information Related Records Documentation Custom			
Messages Activities Files User_Notes				
VIEW STATUS ACTIVITY TYPE Default ALI - ALI - ACTIVITY TYPE - AlI -				
New Task Log Task New Phone Call Log Phone Call	New Event Log Event View History Customise View			
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 Information		
FINANCE REQUIRED No, Full Payment	NOTES	FINANCE CONSULTANT
FINANCING STATUS Final	Finance Approved	FIRST DEBIT ORDER DATE
FINANCING OUTCOME Approved		Finance Decline Health Green
REASON FOR DECLINE		
Forecasting		
OPPORTUNITY AMOUNT 26,450.00		
Advanced Info		
SUBSIDIARY AIE	INTAKE 2024 Intake 2	INTAKE START DATE GROUP 01/08/2024
DEPARTMENT Academics : School of Business, Entrepreneurship & Finance	CAMPUS Online	INTAKE START DATE GROUF 15/08/2024
PROGRAMME/COURSE ABQ039 Occupational Certificate: Tax Professional (First Year)	LEARNING METHOD Part Time Online	INTAKE START DATE GROUF 20/08/2024
COURSE TYPE Qualification	LAPTOP SPEC	
	LAST SALES ACTIVITY	
Items Relationships Communication Address Sales System Information Related R	ecords <u>D</u> ocumentation C <u>u</u> stom	
Messages Activities · Eiles · User_Notes		
VIEW STATUS ACTIVITY TYPE Default - All - - - - - - All - ▼		
New Task Log Task New Phone Call Log Phone Call New Event Log Event Viet	ew History Customise View	
EDIT TITLE	DATE V TIME OWNER S	STATUS