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How To Add My Tasks to My Dashboard

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Dashboard

- First screen you see when you log into CRM
- Up to 5 key pieces of information that are specific to you

The screenshot displays the FLEXableIT CRM dashboard for user Mary Cox. The interface includes a navigation menu with options like Home, Feeds, Leads, Accounts, Contacts, Potentials, Campaigns, Reports, Dashboards, Quotes, Activities, and Cases. The main content area is divided into three sections:

- Open Tasks:** A table listing tasks with columns for Subject, Due Date, Status, Priority, and Activity Type.
- Leads by Source:** A 3D bar chart showing the number of leads from various sources.
- Pipeline by Stage:** A funnel chart showing the distribution of leads across different stages of the sales pipeline.

Subject	Due Date	Status	Priority	Activity Type
Call about FM Bid		Not Started	High	Tasks
Call about...	27/02/2015	Not Started	High	Tasks
Pleas call Mary about Zoho	24/02/2015	Not Started	High	Tasks
Follow up potential	25/01/2015	Not Started	High	Tasks
Follow up potential	22/01/2015	Not Started	High	Tasks

Leads by Source: A 3D bar chart showing the number of leads from various sources. The Y-axis is labeled 'Record Count' and ranges from 0 to 500. The X-axis is labeled 'Lead Source' and includes categories like Advertisement, Cold Call, Employee Referrals, Economic Referrals, Online Search, Press, Public Relations, Sales to Mail, Trade Shows, Webinars, and Web Research.

Pipeline by Stage: A funnel chart showing the distribution of leads across different stages of the sales pipeline. The legend indicates the following stages: Qualification (yellow), Needs Analysis (red), Id. Decision Makers (green), Proposal/Price Quote (blue), and Negotiation/Review (orange).



Build a Custom View

- Go to the Module “Activities”
- Select “Create View”
- Choose the columns you need to see
- Show this Custom View only to me
- Specify Criteria:
 - Activity Owner is: You
 - Activity Type is: Tasks
 - Status isn’t: Completed
- Save

View Name: Mark as Favorite

Choose Columns:

Available Columns:

- Task Information
 - Due Date
 - Status
 - Priority
 - Send Notification Email
- Event Information
 - From
 - Location
 - Send Notification Email
 - To
 - All day

Add

Selected Columns:

- Subject
- Activity Type
- From
- Due Date
- Status
- Priority

Who can see this view ?

All Users are allowed to view this Custom View.

Show this Custom View only to me.

Allow the following users to view this Custom View.

Specify Criteria:

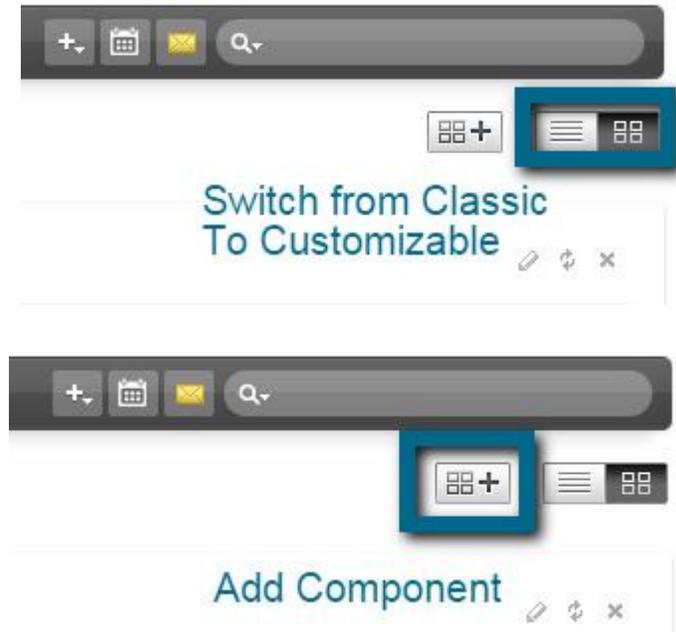
1	<input type="text" value="Activity Owner"/>	<input type="text" value="Is"/>	<input type="text" value="Mary Cox"/>	<input type="text" value=""/>
2	<input type="text" value="AND"/>	<input type="text" value="Activity Type"/>	<input type="text" value="Is"/>	<input type="text" value="Tasks"/>
3	<input type="text" value="AND"/>	<input type="text" value="Status"/>	<input type="text" value="Isn't"/>	<input type="text" value="Completed"/>

Criteria Pattern = ((1 and 2) and 3) [Edit Pattern](#)



Add to Dashboard

- Go to Home Screen
- Switch from Classic to Customizable
- Select Add a Component
- Select Module: Activities
- Select the Custom View you just built
- Column Layout: 2
- Component Name: My Tasks
- Save





Add To Dashboard

- By Default it will be the top dashboard
- If you hover over the Component you will get a cross with four arrows – click the mouse to drag and drop the component to your preferred location

Add Component ×

This page helps you add new component to your home page

Select Module :

*Component Name :

*Column Layout :

Custom View :

Save