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How To Add My Tasks to My Dashboard

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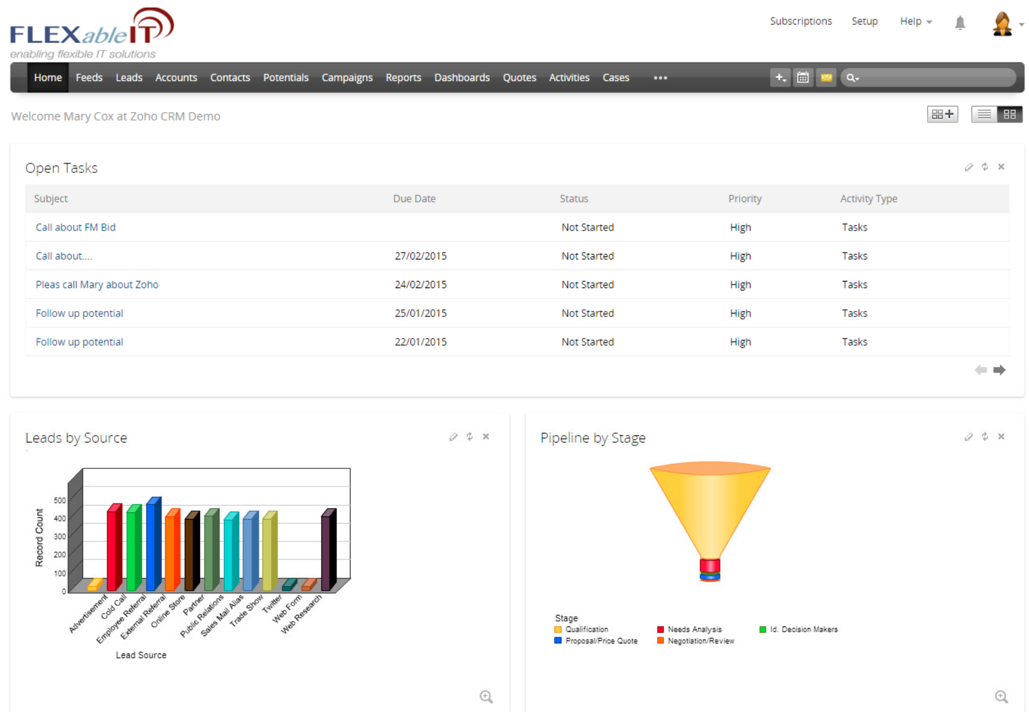
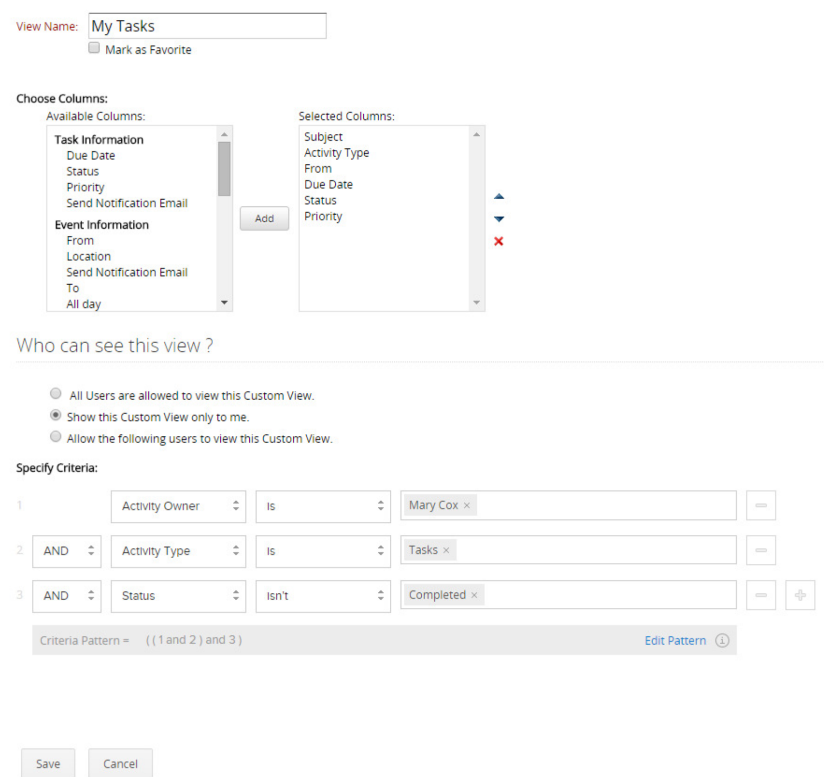
Dashboard

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



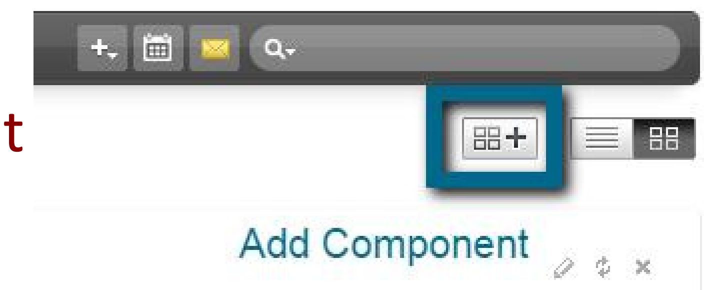
Build a Custom View

- 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



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