

Tasks dashboard widget

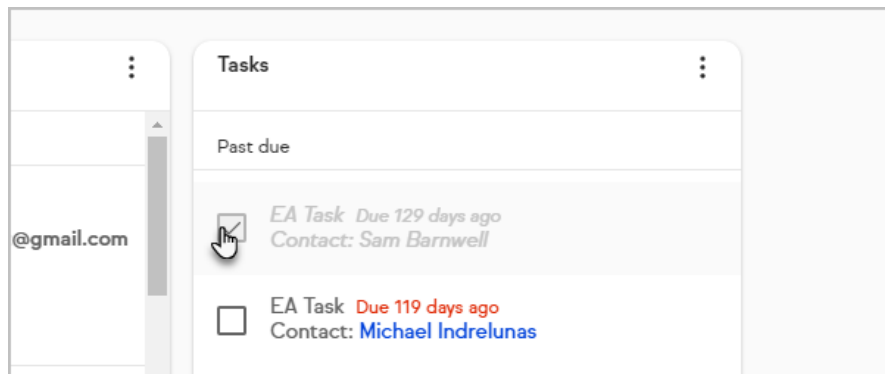
Last Modified on 09/25/2024 2:44 pm MST

Tags: [Keap-Pro](#) [Keap-Max](#)

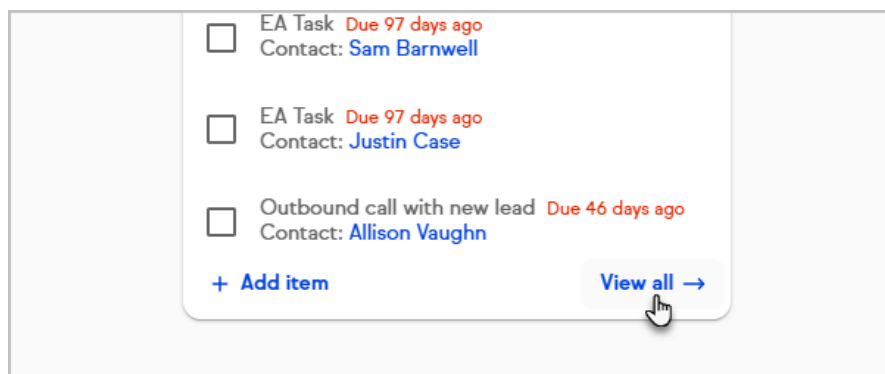
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Overview

- The **Tasks** widget shows a list of tasks sorted by due date
- Checking a task will mark it as complete
- You can uncheck a task if you accidentally marked it as complete
- Tasks that you marked as **Complete** will no longer be visible the next time you load your Dashboard, but can still be found on the Tasks page



- Click **View all tasks** to view all tasks that you have created



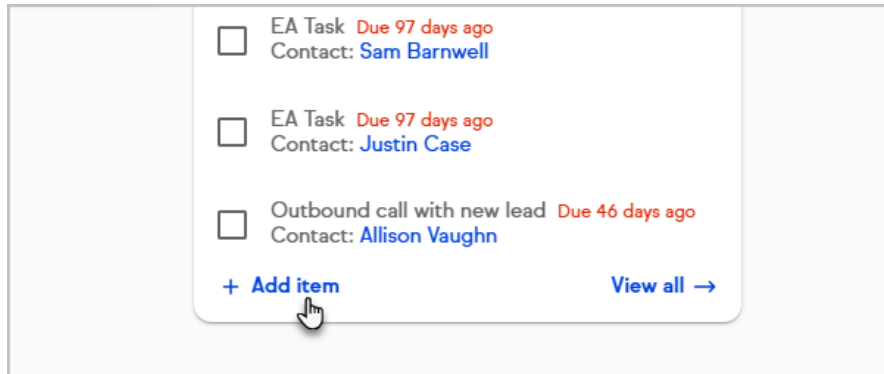
Notifications and nudges

- An email notification for a new task will go out if the task's assigned user is not signed into Keap.

- Setting a Reminder will both send an email and a nudge on the mobile app
- The assigned user will get a notice of completion by email if a different user completes their task

Add a task

1. Click the **Add item** button



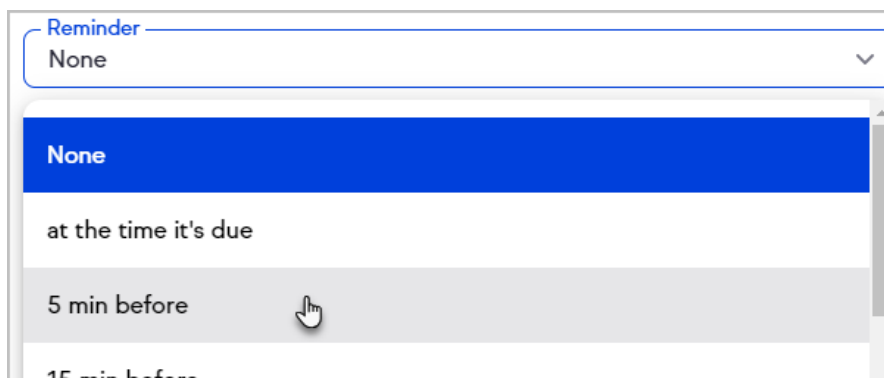
2. Enter a **Task title**, **Due date** and **time**

 A screenshot of the 'Add a task' form. The form has a title 'Add a task' with a close button 'X'. It contains three input fields:

- Task title***: A text input field containing 'Follow up call'.
- Due date**: A date input field containing 'June 9, 2021'.
- at**: A time input field containing '12:30 pm'.

 Below these fields is a **Reminder** dropdown menu currently set to 'None'.

3. **Reminder**: Create a reminder that will notify you (via email) prior to the due date/time.



4. Enter a **Note**

Reminder
1 day before

Note
Client was not ready to begin coaching, but may be ready at end of month

Associated contact

5. Select an **Associated contact**

Associated contact

+ Add new contact

Albert Sampson

Max Wright

Beau Young

6. Choose an **Assigned user** - This user will receive the reminders and notifications for the task

Assigned user
Michael Indrelunas (michael.indrelunas@keap.com)

Michael Indrelunas (michael.indrelunas@keap.com)

Michael Test ()

Michael - Staff Indrelunas - Staff ()

7. Click **Save**
