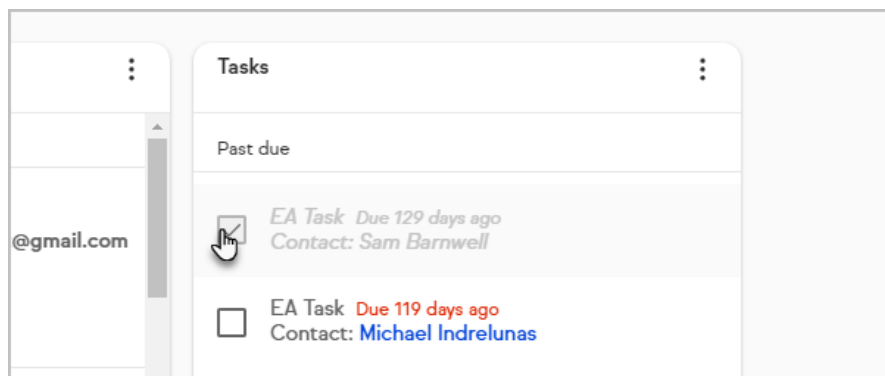


# Tasks dashboard widget

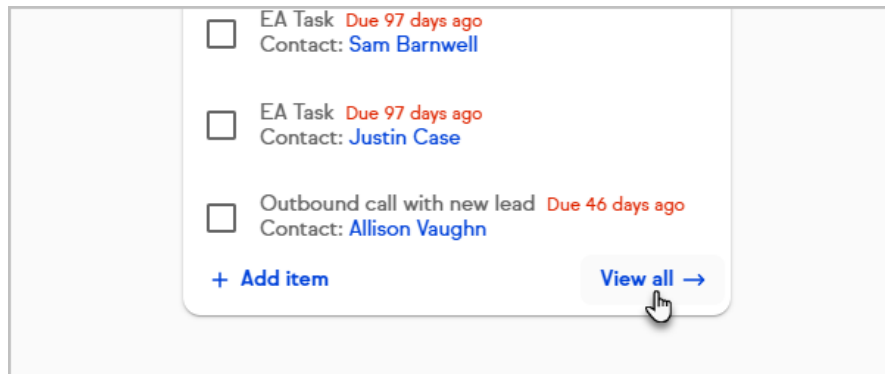
This article applies to:

## 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

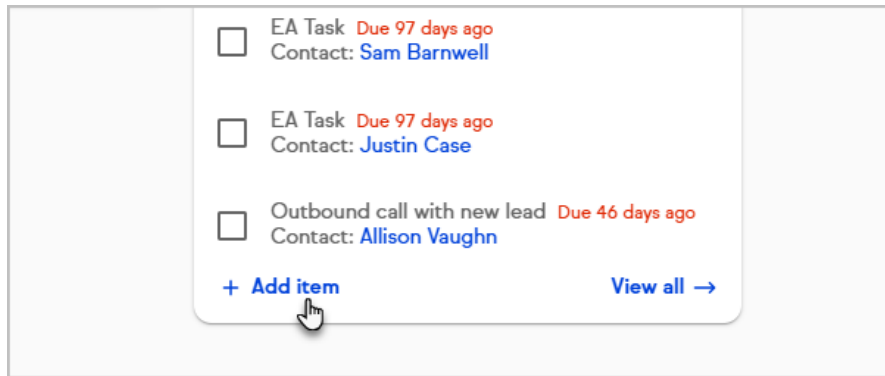


## Notifications and nudges

- 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 title is 'Add a task'. The 'Task title\*' field contains 'Follow up call'. The 'Due date' field contains 'June 9, 2021' and the 'Time' field contains '12:30 pm'. The 'Reminder' dropdown menu is open, showing 'None' as the selected option.

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

A screenshot of the reminder dropdown menu. The 'None' option is highlighted in blue. Other visible options are 'at the time it's due', '5 min before', and '15 min before'. A mouse cursor is pointing at the '5 min before' option.

4. Enter a Note

A screenshot of the form showing the 'Reminder' dropdown set to '1 day before' and the 'Note' field containing the text 'Client was not ready to begin coaching, but may be ready at end of month'. The 'Associated contact' dropdown is also visible.

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**
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