

Create a Task in the underlying application

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Create a Task in the underlying application

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The screenshot displays a CRM dashboard with the following components:

- Navigation:** Dashboard, Leads, Profile, Iframes. Search and settings icons are in the top right.
- Revenue over time:** A bar chart showing revenue for the last 8 months. A 'VIEW DETAILS' button is at the bottom right.
- Open tasks:** A list of tasks with a 'Sorting by most recent' dropdown and a 'CREATE NEW TASK' button.
 - Follow-up call with John Smith
 - Send product brochure to Sarah Lee
 - Presentation to Global Industries Inc.
 - Follow-up with Emily Chen
 - Update contact information for Olivia Davis
- Goals:** A list of goals with a 'Default' dropdown and a 'CREATE NEW LEAD' button.
 - John Smith, Acme Corporation (Stage: Opportunity)
 - Sarah Lee, XYZ Enterprises (Stage: Lead)
 - Robert Johnson, Global Industries (Stage: Customer)
 - Michael Brown, Innovative Solutions (Stage: Lead)
 - Olivia Davis, Bright Ideas Inc. (Stage: Customer)

PROPERTY NAME: Dorin Iulian Chiritoiu Playground
LANGUAGE: English
EXPORT DATE: 21 August 2023

ACCOUNT LINK: <https://family.userlane.com/app/wd75q>
<https://go.userlane.com/wd75q/102839>

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Tasks Dashboard

To get a quick overview of the tasks that need to be finalized, check the tasks dashboard.

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 - Michael Brown, Innovative Solutions (Stage: Lead)
 - Olivia Davis, Bright Ideas Inc. (Stage: Customer)A 'CREATE NEW LEAD' button is at the bottom.

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Create a task

If you wish you create a task, click on Create New Task button.

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 - Follow-up call with John Smith
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 - Update contact information for Olivia DavisA 'CREATE NEW TASK' button is highlighted with a blue box at the bottom right.
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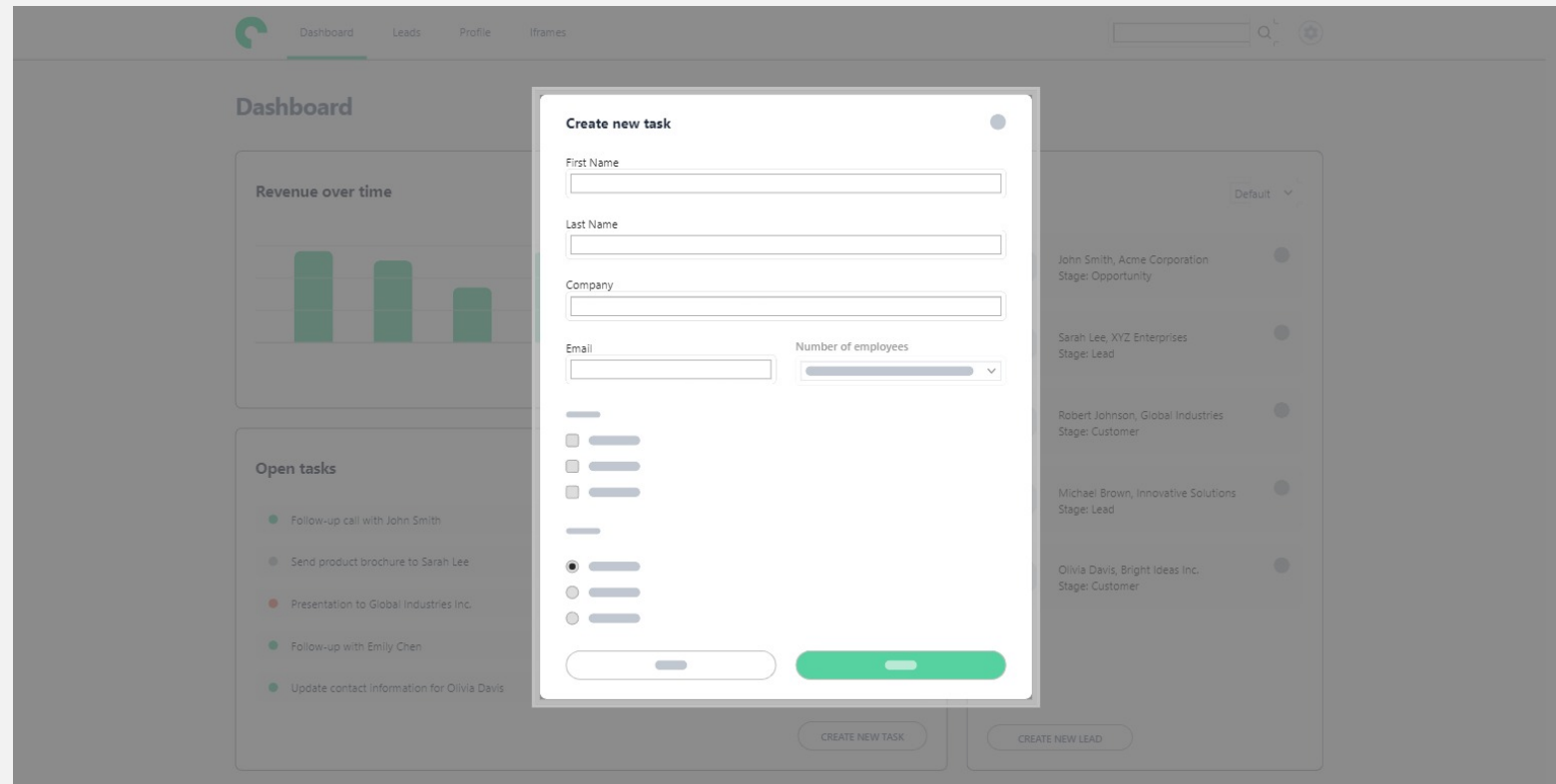
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Task module

In the Task module you have access to certain fields.

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Email field

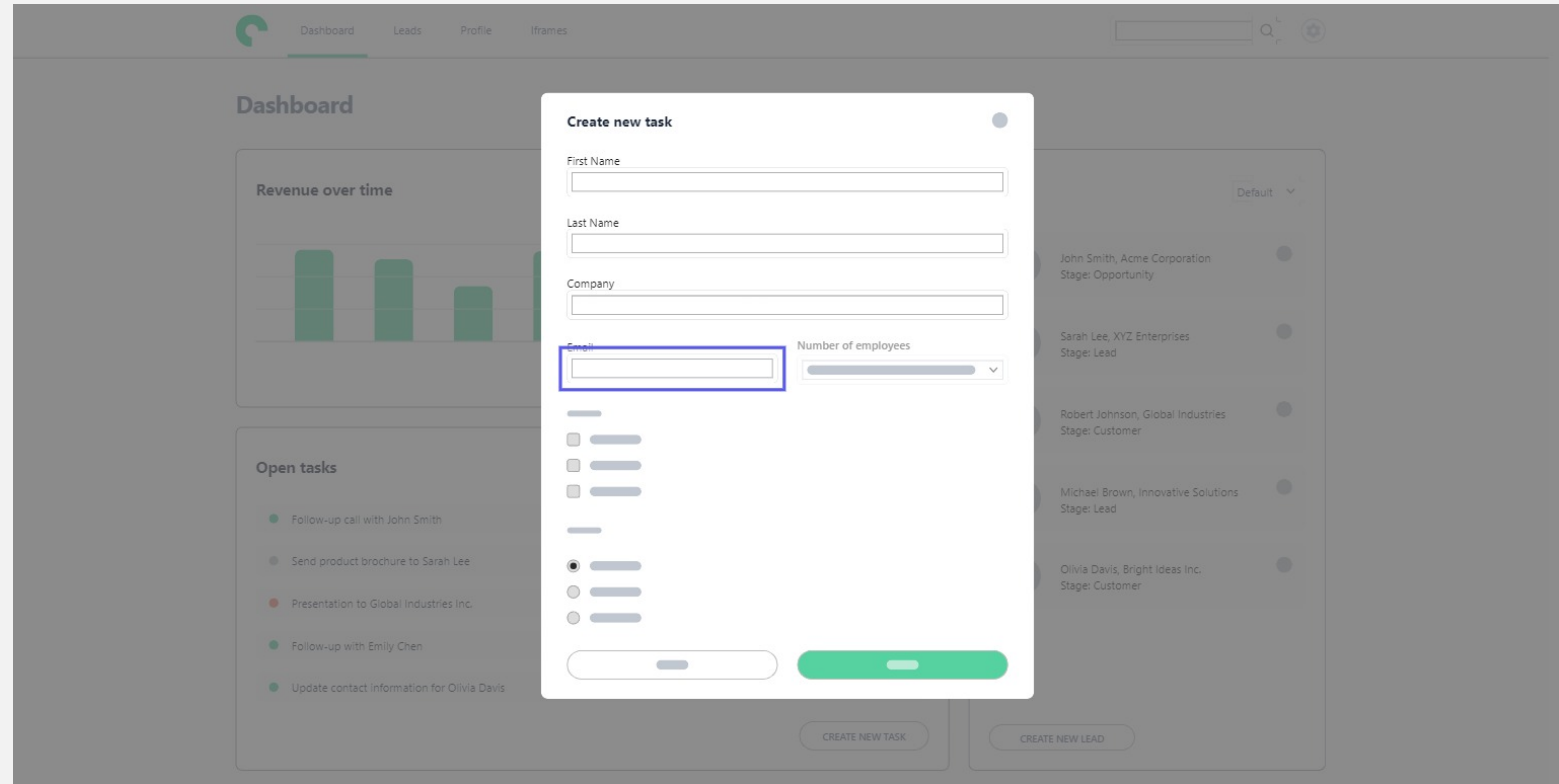
The mandatory field is the email field - a notification will be sent if the task is not completed on time.

NEXT

SHORTCUTS:

ENTER

TAB



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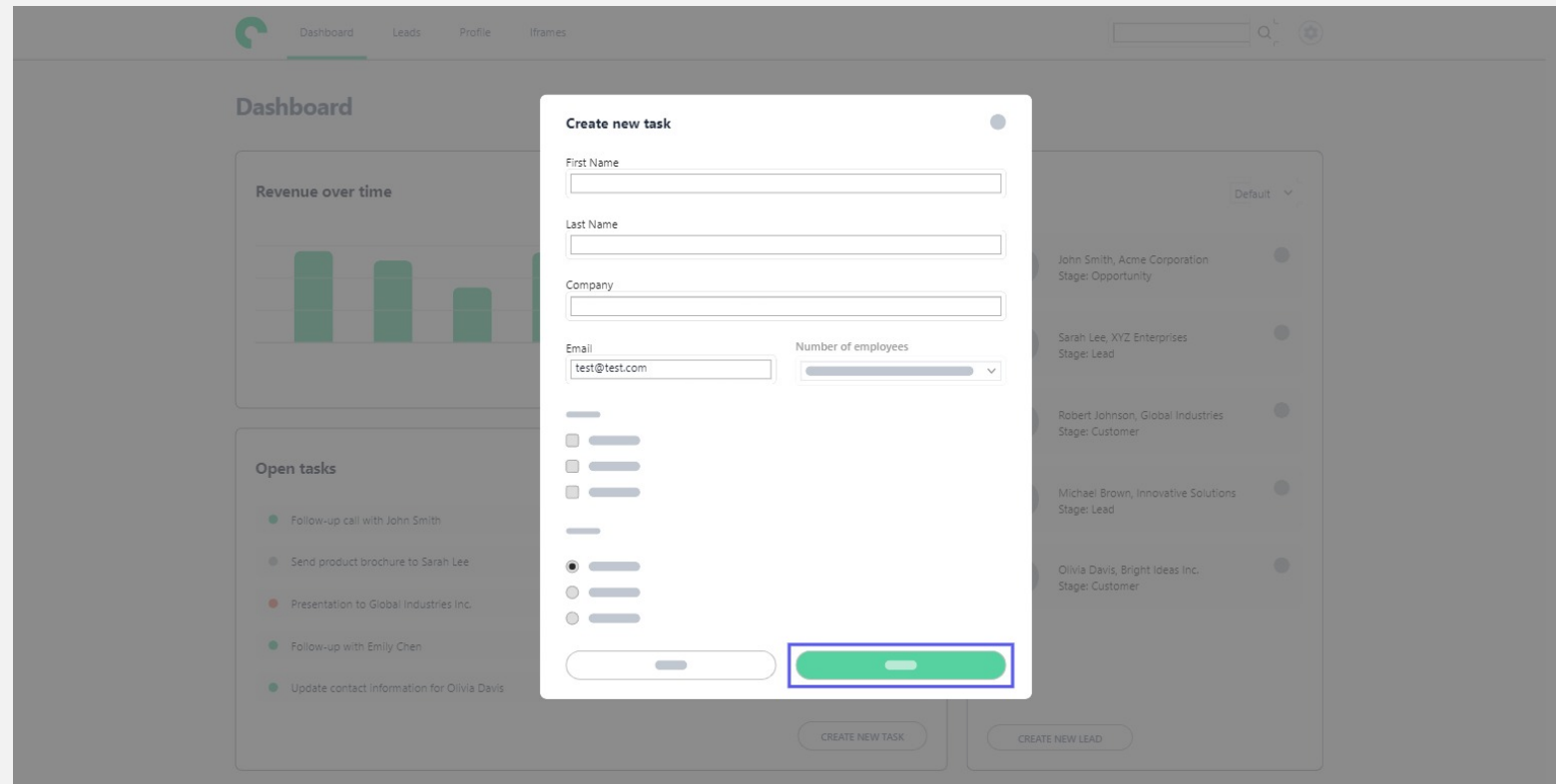
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Click Save

When pressing Save, a new task will be added to the Dashboard.



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Task was created

The task was created and now it can be accessed anytime from the Dashboard.

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 - Send product brochure to Sarah Lee (grey dot)
 - Presentation to Global Industries Inc. (red dot)
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Congrats! You completed the training!

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