SMALL BUSINESS TASK DASHBOARD GUIDE

4.0 - 2/17/2024

SpreadWiseCo™

Spreadsheets Reimagined

BUILT WITH MICROSOFT EXCEL

These tools are designed to be easy to use, with minimal inputs from you, and many outputs from us. Follow each tool guide closely. There are normally only a few true steps within the guide, but the rest is information to help you along the way.

GUIDE LEGEND

GUIDE POINTERS

NEED TO KNOW

NICE TO KNOW

FOR THOSE READY TO JUMP IN QUICKLY

SK YOU CAN SKIP AND COME BACK :)

DSK DON'T SKIP!

USER INPUTS

INPUT BOX

DROP DOWN MENU

REVISION INFORMATION

Latest Task Dashboard
Revision: 4.0

PASSWORD

- Tabs are locked to prevent accidental formula errors. Password: "swc"
- Use with discretion. Formulas and setups are extremely complex.

THIS JOURNEY BEGINS BY SETTING UP THE DASHBOARD INPUTS FOR YOUR PARTICULAR TASK LIST

TASK INPUTS

DAY/FREQUENCY	TASK LIST
Monday	Order Materials
Wednesday	Business Meeting
	Task 3
	Task 4
	Task 5
	Task 6
	Task 7
	Task 8
	Task 9
	Task 10
	Task 11
	Task 12
	Task 13
	Task 14
	Task 15
	Task 16
	Task 17
	Task 18
	Task 19
	Task 20
	Task 21
	Task 22
	Task 23
	Task 24
	Task 25
	Task 26
	Task 27
	Task 28
	Task 29
	Task 30
	Task 31
	Task 32
	Task 33
	Task 34
	Task 35
	Task 36
	Task 37
	Task 38
	Task 39
	Task 40

SET TASK LIST	LIST # (OPTIONAL)
Owner's Actions	1.0

TASK CODES (USE SINGLE LETTER)	
COMPLETED	C
DELAYED / ON HOLD	D
SKIPPED	S

DSK

SET THE NAME OF YOUR TASK LIST

SET YOUR LIST #
- THIS IS AN OPTIONAL INPUT, IN THE EVENT YOU HAVE MORE THAN 1 LIST.

- CHOOSE UP TO 5 TRACKING CODES YOU PLAN TO USE.
  - MAKE SURE THE CODE IS A SINGLE LETTER!

TASK INPUTS

DAY/FREQUENCY	TASK LIST
Monday	Order Materials
Wednesday	Business Meeting
	Task 3
	Task 4
	Task 5
	Task 6
	Task 7
	Task 8
	Task 9
	Task 10
	Task 11
	Task 12
	Task 13
	Task 14
	Task 15
	Task 16
	Task 17
	Task 18
	Task 19
	Task 20
	Task 21
	Task 22
	Task 23
	Task 24
	Task 25
	Task 26
	Task 27
	Task 28
	Task 29
	Task 30
	Task 31
	Task 32
	Task 33
	Task 34
	Task 35
	Task 36
	Task 37
	Task 38
	Task 39
	Task 40

SET TASK LIST	LIST # (OPT
Owner's Actions	1.0

TASK CODES (USE SINGLE LETTE	
COMPLETED	C
DELAYED / ON HOLD	D
SKIPPED	S

SET YOUR TASK LIST
1. CHOOSE THE FREQUENCY OF THE TASK. YOU CAN CHOOSE BETWEEN A SPECIFIC DAY OF THE WEEK, OR A SPECIFIC INTERVAL.
2. LIST OUT THE ACTUAL TASK.

TASK INPUTS

DAY/FREQUENCY	TASK LIST
Monday	Order Materials
Wednesday	Business Meeting
	Task 3
	Task 4
	Task 5
	Task 6
	Task 7
	Task 8
	Task 9
	Task 10
	Task 11
	Task 12
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	Task 24
	Task 25
	Task 26
	Task 27
	Task 28
	Task 29
	Task 30
	Task 31
	Task 32
	Task 33
	Task 34
	Task 35
	Task 36
	Task 37
	Task 38
	Task 39
	Task 40

SET TASK LIST
Owner's Action

TASK CODE
COMPLETED

DELAYED / ON HO

SKIPPED

THE HEADER AUTO POPULATES WITH THE MONTH AND THE TASK LIST DETAILS
** THIS IS GREAT IF YOU PRINT THE SHEETS AND DON'T WANT TO LOSE TRACK OF WHAT YOU'RE LOOKING AT ACROSS MULTIPLE LISTS.

- FOR EACH TAB, YOU WILL NEED TO SET THE FIRST DAY OF THE MONTH
  - WHY? WE SET IT THIS WAY SO THE FILE WORKS ACROSS DIFFERENT YEARS!

Task List Tracker - August - Owner's Actions - 1

| FIRST DAY OF MONTH | 8/1/23 | TASK LIST | Owner's Actions | LIST # | 1.0 |

August

Tasks	Task Completion Details																															
Monday - Order Materials						C					C																						
Wednesday - Business Meeting				S																													
- Task 3																																	
- Task 4																																	

(Column dates: Tuesday, August 1, 2023; Wednesday, August 2, 2023; Thursday, August 3, 2023; Friday, August 4, 2023; Saturday, August 5, 2023; Sunday, August 6, 2023; Monday, August 7, 2023; Tuesday, August 8, 2023; Wednesday, August 9, 2023; Thursday, August 10, 2023; Friday, August 11, 2023; Saturday, August 12, 2023; Sunday, August 13, 2023; Monday, August 14, 2023; Tuesday, August 15, 2023; Wednesday, August 16, 2023; Thursday, August 17, 2023; Friday, August 18, 2023; Saturday, August 19, 2023; Sunday, August 20, 2023; Monday, August 21, 2023; Tuesday, August 22, 2023; Wednesday, August 23, 2023; Thursday, August 24, 2023; Friday, August 25, 2023; Saturday, August 26, 2023; Sunday, August 27, 2023; Monday, August 28, 2023; Tuesday, August 29, 2023; Wednesday, August 30, 2023; Thursday, August 31, 2023; Friday, September 1, 2023)

5 - TRACKING TABS

ADD IN THE LETTER CODE BY DAY AND TASK AS YOU GO THROUGH THE MONTH. THE DASHBOARD WILL COMPILE THIS INTO YOUR DASHBOARD TABLE.

***THE LETTER CODES USED HERE NEED TO MATCH WHAT YOU PROVIDED IN THE DASHBOARD INPUTS TAB!

August

Tasks	Task Completion Details	Tuesday, August 1, 2023	Wednesday, August 2, 2023	Thursday, August 3, 2023	Friday, August 4, 2023	Saturday, August 5, 2023	Sunday, August 6, 2023	Monday, August 7, 2023	Tuesday, August 8, 2023	Wednesday, August 9, 2023	Thursday, August 10, 2023	Friday, August 11, 2023	Saturday, August 12, 2023	Sunday, August 13, 2023	Monday, August 14, 2023	Tuesday, August 15, 2023	Wednesday, August 16, 2023	Thursday, August 17, 2023	Friday, August 18, 2023	Saturday, August 19, 2023	Sunday, August 20, 2023	Monday, August 21, 2023	Tuesday, August 22, 2023	Wednesday, August 23, 2023	Thursday, August 24, 2023	Friday, August 25, 2023	Saturday, August 26, 2023	Sunday, August 27, 2023	Monday, August 28, 2023	Tuesday, August 29, 2023	Wednesday, August 30, 2023
Monday - Order Materials								C						C																	
Wednesday - Business Meeting									S																						
- Task 3																															

- Built With **Microsoft Excel**
- NOT Optimized For Use With **Google Sheets**

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FORMATTED FOR A LETTER SIZED SHEET!

IMPORTANT

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