SMALL BUSINESS TASK DASHBOARD GUIDE

4.0 - 2/17/2024







BUILT WITH MICROSOFT EXCEL

GUIDE OVERVIEW

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

YOU CAN SKIP
AND COME
BACK



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.

1 - GETTING STARTED



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	С									
DELAYED / ON HOLD	D									
SKIPPED	S									

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2 - TASK LIST SETUP

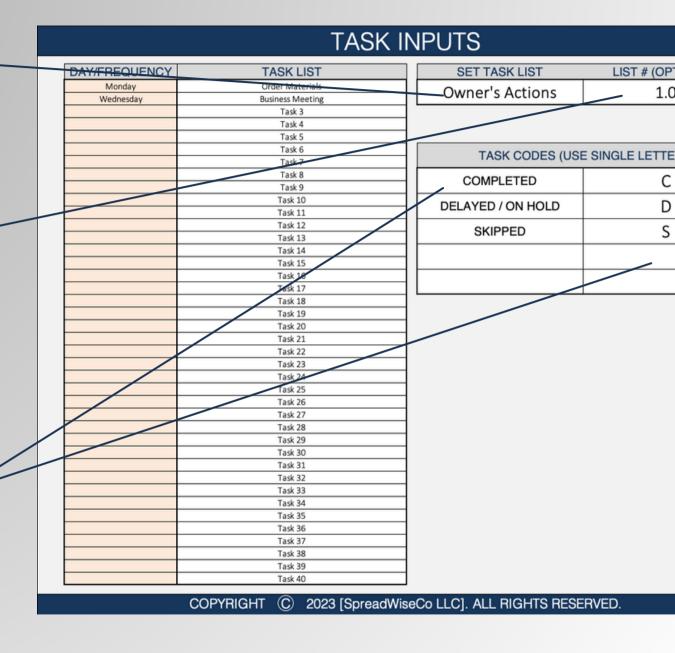


SET THE NAME OF YOUR TASK LIST

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!



3 - TASK LIST



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.

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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
Owner's Action

TASK CODE

COMPLETED

DELAYED / ON HO

SKIPPED

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4 - TRACKING TABS



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!





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	,
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Tuesday, August 1, 2023 Wednesday, August 2, 2023 Thurs day, August 3, 2023 Thurs day, August 4, 2023 Saturday, August 6, 2023 Tuesday, August 7, 2023 Thurs day, August 10, 2023 Thurs day, August 11, 2023 Thurs day, August 11, 2023 Thurs day, August 12, 2023 Thurs day, August 13, 2023 Thurs day, August 11, 2023 Thurs day, August 11, 2023 Thurs day, August 11, 2023 Thurs day, August 12, 2023 Thurs day, August 19, 2023 Saturday, August 21, 2023 Wednesday, August 22, 2023 Thurs day, August 25, 2023 Thurs day, August 25, 2023 Saturday, August 27, 2023	Tuesday, August 29, 2023
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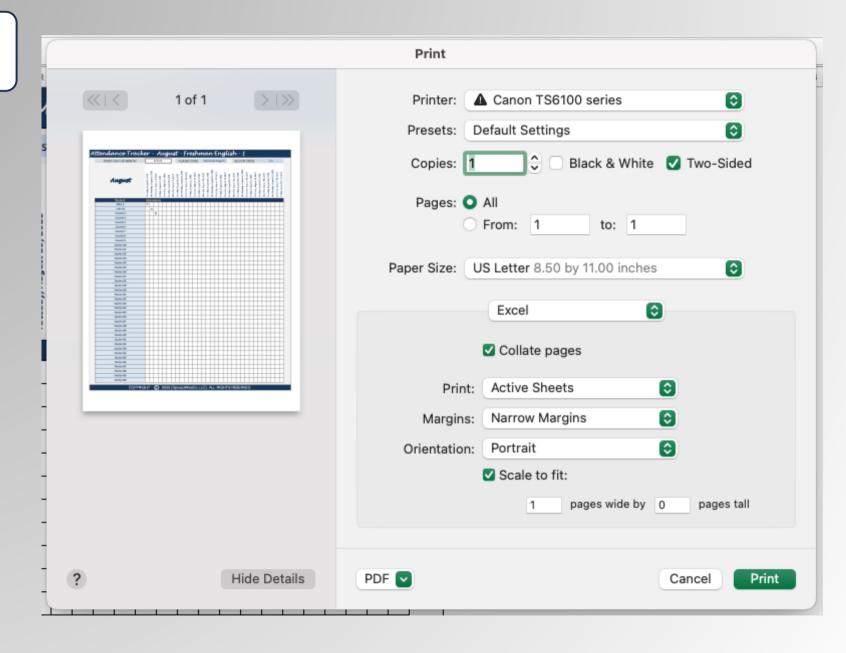
Tasks	Task Completion Details																						
Monday - Order Materials							С							С									
Wednesday - Business Meeting									S														
- Task 3																							



6 - TRACKING TABS - PRINTABLE!



FORMATTED FOR A LETTER SIZED SHEET!



IMPORTANT

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