

SMALL BUSINESS TASK DASHBOARD GUIDE

4.0 - 8/17/2024

Spreadsheets Reimagined



SpreadWiseCoTM

BUILT WITH
MICROSOFT
EXCEL



ABOUT THIS GUIDE

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 😊



DON'T SKIP!

TOOL USER INPUTS

INPUT BOX

DROP DOWN
MENU

**PASSWORD

- The file password is included in the first tab of your workbook.
- Use with discretion. Formulas and setups can be extremely complex, even for the most savvy spreadsheet users.

THERE IS AN ABOUT TAB IN EVERY WORKBOOK THAT INCLUDES IMPORTANT INFORMATION ABOUT YOUR DASHBOARD, AND USEFUL LINKS.

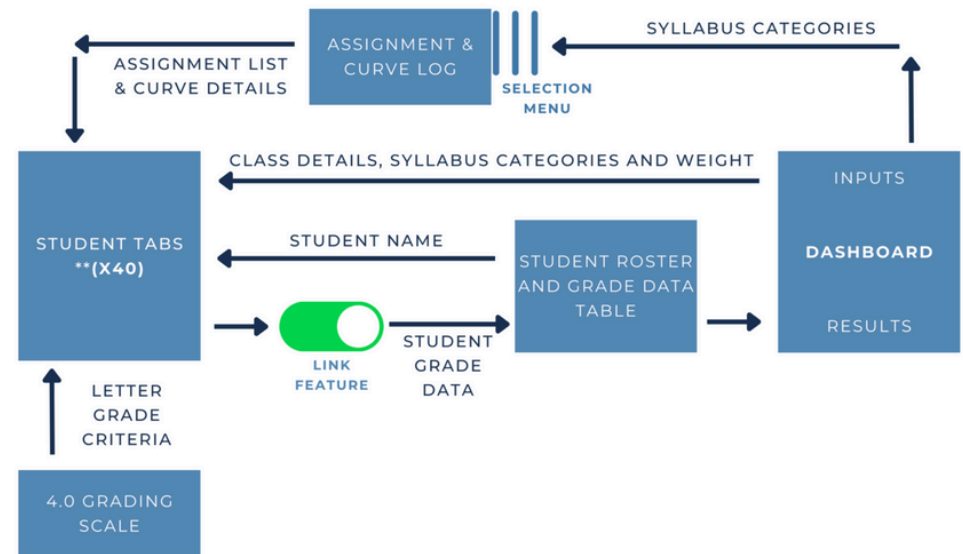
WE PROVIDE A HIGH LEVEL FLOW CHART FOR EVERY TOOL FOR A QUICK REFERENCE OF HOW IT ALL WORKS!

STUDENT GRADEBOOK AND ASSIGNMENT DASHBOARD

REVISION: 4.5

- 1 **Password** Tabs are **locked** to prevent accidental errors to formulas:
Password Key: "swc"
- 2 **Tool Inputs** **Your Inputs** are the White Boxes With A Border!
- 3 **Tool Inputs** Peach boxes are **drop down menus**
- 4 **PDF Guide** ****Use the downloaded guides to help you through the tool. You can Also visit our website anytime to view & download the**
- 5 **Site Link** <https://spreadwiseco.com/>
- 6 **Google Sheets** This Dashboard is Not optimized for use with Google Sheets.
- 7 **Support** ****For support, message us on Etsy directly from your order, or send an email to Sales@SpreadWiseCo.com. Pictures are**
- 8 **Review** **LOVE IT? CLICK & LEAVE US A REVIEW!**

TOOL FLOW CHART



****DASHBOARD IS PRESET WITH (5) STUDENT TABS. BY SIMPLY MAKING A COPY OF THE TAB, YOU CAN QUICKLY LINK UP TO (40)**

BUILT WITH



Microsoft
Excel 365

COMPATABILITY



All Microsoft
Excel Versions

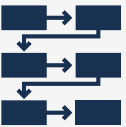


Not Compatible
with Google
Sheets

PRODUCT GUIDES



Detailed PDF
Guide



Detailed Tool
Flow Chart

VIDEO TUTORIALS



Not Yet Available

CURRENCY



Not Applicable
To This Product

TABS

- About & Tool Flow Chart
- Task Inputs
- Task Dashboard
- Monthly Tracking Tabs **(x12)**

LEARN MORE



***VISIT OUR WEBSITE FOR MORE
PRODUCT FEATURES AND DETAILS!!***

[HTTPS://SPREADWISECO.COM](https://spreadwise.co.com)

1 - GETTING STARTED



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

TASK INPUTS

DAY/FREQUENCY	TASK LIST	SET TASK LIST	LIST # (OPTIONAL)
Monday	Order Materials	Owner's Actions	1.0
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		

TASK CODES (USE SINGLE LETTER)	
COMPLETED	C
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!

TASK INPUTS

DAY/FREQUENCY	TASK LIST	SET TASK LIST	LIST # (OPT)
Monday	Order Materials	Owner's Actions	1.0
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		

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

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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.

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
Owner's Action

TASK CODE
COMPLETED
DELAYED / ON HOLD
SKIPPED

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!

Task List Tracker - August - Owner's Actions - 1													
FIRST DAY OF MONTH	8/1/23	TASK LIST	Owner's Actions	LIST #	1.0								
August	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													

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

6 - TRACKING TABS - PRINTABLE!



FORMATTED FOR A LETTER SIZED SHEET!

Print

Printer:

Presets:

Copies: Black & White Two-Sided

Pages: All
 From: to:

Paper Size:

Collate pages

Print:

Margins:

Orientation:

Scale to fit:
 pages wide by pages tall

? Hide Details PDF Cancel Print

IMPORTANT

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