INSTRUCTIONS

-TASK TRACKER GUIDE-

TO DO TRACKER

Welcome to your brand new Task Tracker spreadsheet!

We are thrilled to have you on board, and we're confident that this template will help you achieve your task management goals. Our mission is to make tracking your tasks easier and more effective, so you can focus on reaching your objectives.

Thank you for choosing our template. We believe that with hard work and dedication, you can achieve your goals and take control of your task management. We are here to support you every step of the way, so don't hesitate to reach out if you have any questions or concerns.

Together, let's make task management a successful journey.

Best regards, Digital Tools Market Team

LET'S START

With a few important things...

Please note that this template can only be used on Google Sheets and is not compatible with Excel. A Google account is required to access the spreadsheet.

Due to the nature of digital downloads, all sales for this template are final and no returns, exchanges, or cancellations will be accepted.

MAKE YOUR OWN EDITABLE COPY

To begin working your tasks, it's important to have your own personal, editable copy of this reading tracker.

It's easy.

Go to the '**File**' menu and click on '**Make a Copy**'.

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Make a copy	
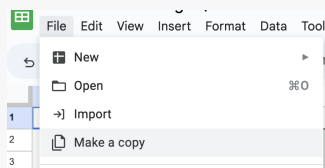
IMPORTANT NOTE: PLEASE DO NOT REQUEST 'EDIT' ACCESS

MOST IMPORTANT INSTRUCTIONS

1. Refer to the Instructions tab for clarification on the task tracking workings.

2. Only edit cells that are not color-coded.

3. Clear the data within rows and columns, but DO NOT delete them.

4. Don't forget to click the "Checkbox" of each task when you've done.

SETUP PAGE

1. Choose Your Start Day:

In the upper right corner, select your preferred start day for the weekend: Sunday or Monday. This will set the beginning of your Calendar.

3. Delegated To:

In the "Delegated To" section, you can submit names, users, or individuals to whom you might delegate tasks.

This feature allows you to easily assign tasks to specific team members or collaborators.

2. Priorities and Status:

Define your task priorities and statuses.

You can assign up to 10 different priorities and statuses.

Choose a symbol from the dropdown list for each priority and status.

Priorities help you identify the importance of tasks, while statuses track their progress.

4. Categories / Projects:

In the "Category / Project" section, you can define up to 30 categories or projects for your tasks.

Delete or adjust the preset categories/projects based on your needs.

These categories will help you organize and assign your tasks effectively.

TASK ENTRIES - TRACKER

1. Task Column:

In the "Task" column, submit the name or description of your task.

This is where you define the tasks you need to complete.

2. Due Date:

In the "Due Date" column, enter the deadline for each task.

Setting a due date will trigger notifications on the Dashboard and Calendar tabs to keep you on track.

3. Priority:

Use the "Priority" column to assign a priority level to each task.

Prioritizing tasks helps you focus on what's most important.

4. Status:

In the "Status" column, update the status of your tasks.

Choose from the predefined statuses (e.g., Not Started, In Progress, Completed) to track progress.

5. Category:

Assign a category to each task in the "Category" column.

Categories help you organize and group tasks by type or project.

6. Delegate:

In the "Delegate" column, select a name from the dropdown list to indicate who is responsible for the task.

Delegating tasks helps distribute workload efficiently.

7. Description:

Use the "Description" column to provide additional information or details about each task.

Elaborate on task specifics if needed.

8. Task Completion:

Mark the checkbox in front of each task to indicate that it is completed.

Note that setting the status as "Completed" alone is not sufficient; you must also check the box.

CALENDAR

1. Don't Show Tasks with Status:

Start by selecting up to three task statuses you don't want to see on the Calendar and Dashboard tab *(On Dashboard tab will affect "Today's", "Tomorrow's", and "Due Date" sections)*. **Recommended statuses to exclude:** "Completed," "Cancelled," and "Skipped."

This helps keep your view uncluttered and focused on active tasks.

2. Month and Year Selection:

Choose any year and month you want to view, and the calendar will adjust accordingly.

Easily navigate to past or future months to plan and track your tasks.

3. Today's Summary:

On the top right, the "Today's Summary" section displays up to 6 tasks and other entries relevant for the current day.

Stay informed about your day's tasks at a glance.

4. Calendar View:

The calendar is the main section of this tab.

It adjusts based on your selected start week day from the Setup Page and the chosen month and year.

Tasks and entries for each day are displayed, with up to 6 entries per day.

The current day is highlighted for quick reference.

5. Other Entries:

On the left, you have the "Other Entries" board.

Submit any additional entries you desire, set due dates, and manage non-task-related events.

5. Task Entries:

On the right, you'll find the "Task Entries" board.

It displays tasks from the "Task Entries-Tracker" tab for the selected month and year, arranged in descending date order.

DASHBOARD

1. Summary Bar:

At the top, the Summary Bar provides key statistics:

> Total tasks (excluding checkboxed tasks).
>
> Today's tasks.
>
> Overdue tasks.
>
> Completed tasks.

2. Priority Board:

On the left, the Priority Board categorizes tasks by priority level.

Use the dropdown menu to filter tasks by priority.

Easily identify and focus on tasks of higher importance.

3. Status Board:

In the center, the Status Board categorizes tasks by their current status.

Use the dropdown menu to filter tasks by status.

Stay informed about the progress of your tasks.

4. Delegated To Board:

On the right, the Delegated To Board allows you to filter tasks based on the delegate.

Select a delegate from the dropdown menu to see tasks assigned to specific team members or individuals.

5. Overdue Tasks:

On the left, you can view and manage overdue tasks.

Tasks are listed in descending order from the one that was due soonest to the oldest.

6. Today's or Tomorrow's Tasks:

On the right, choose between "Today's Tasks" and "Tomorrow's Tasks" from the dropdown menu.

View tasks that are scheduled for today or tomorrow.

7. Categorized Tasks:

Further below, you can categorize tasks by selecting a category from the dropdown list.

This helps you group and focus on tasks by type or project.

Remember:

The "Dashboard" tab provides a comprehensive view of your tasks, allowing you to filter and prioritize them by various criteria. Use this tab to track your progress and stay organized.

FREQUENTLY ASKED QUESTIONS

CAN I USE THIS TEMPLATE WITH EXCEL INSTEAD OF GOOGLE SHEETS?

Unfortunately, our template is specifically designed for use in Google Sheets and may not function properly if exported to Excel. The formulas and formatting in the spreadsheet have been designed specifically for Google Sheets and may not translate properly when exported to Excel. For the best experience and results, we highly recommend using the template within Google Sheets only. Additionally, Google Sheets is more user-friendly and accessible across all devices, making it the preferred choice for our templates.

CAN I HAVE MORE ROWS ON. . . . . ?

Unfortunately, adding more rows to the template may affect the overall functionality and the formulas. However, we are always here to help and would be happy to make any necessary modifications for you to better meet your needs.

CAN I CHANGE THE TEMPLATES COLORS?

Yes, our template design allows you to customize the colors easily. To change the colors, you can go to the Format menu, select Theme, and then click on the Customize option. There, you will have the option to change the color palette to match your preferences.

Digital Tools Market Team

"May your task tracker template bring you incredible organization, efficiency, and success in all your endeavors. Here's to achieving your goals with ease and making every day a productive one!"

SETUP

-DASHBOARD-

CATEGORY / PROJECT

Work Projects

Personal Tasks

School/Study

Health & Fitness

Finances

Shopping

Family

Social

Home Chores

Travel

Personal Development

Hobbies & Leisure

Event Planning

Reading & Entertainment

Home Office

Research & Learning

Calls & Emails

Appointments

Daily Routine

Goal Tracking

PRIORITY

Low

Medium

High

Very High

Now

Urgent

STATUS

Completed

In Progress

Cancelled

Not Started

Overdue

Delegate

DELEGATE TO

Helen

Tom

Rakesh

Shubh

"The secret of getting ahead is getting started. The secret of getting started is breaking your complex overwhelming tasks into small manageable tasks, and then starting on the first one."

Mark Twain

TASK TRACKER

-TASK LIST-

TASK LIST						
TASK	DUE DATE	PRIORITY	STATUS	CATEGORY	DELEGATE	DESCRIPTION

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CALENDAR

-TASKS-

DON'T SHOW TASKS WITH STATUS[1]

Cancelled

Completed

— TODAY'S SUMMARY —

Enjoy your Day !!!

OTHER ENTRIES

ENTRY	DATE
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July 2024

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30	31			

MONTH'S TASKS

TASKS	DUE DATE

DASHBOARD
-TASK TRACKER-

TOTAL TASKS	TODAY'S TASKS	OVERDUE TASK	COMPLETED
0	0	0	0

TODAY'S DATE
August, 19 2024

TASKS ON EACH PRIORITY

	Low	Medium	High	Very High	Now	Urgent
1						
0.5						
0	0	0	0	0	0	0
-0.5						
-1						

BY PRIORITY
PRIORITY:

DELEGATED TO
PERSON:

BY STATUS
STATUS:

TASKS ON EACH STATUS

OVERDUE TASKS

TASK	DUE DATE
➤ -	

TODAY'S TASKS
TASK
Nothing for Today, Great Job !

NOTES

TASKS ON EACH CATEGORY / PROJECT

BY CATEGORY
CATEGORY:

TASK ENTRIES

CALENDAR

"Productivity is never an accident. It is always the result of a commitment to excellence, intelligent planning, and focused effort."

Paul J. Meyer

[1] Please select the status that should not be taken into consideration. (This applies to the Calendar Tab and Dashboard tab for Today's, Overdue, and Tomorrow Tasks.)