

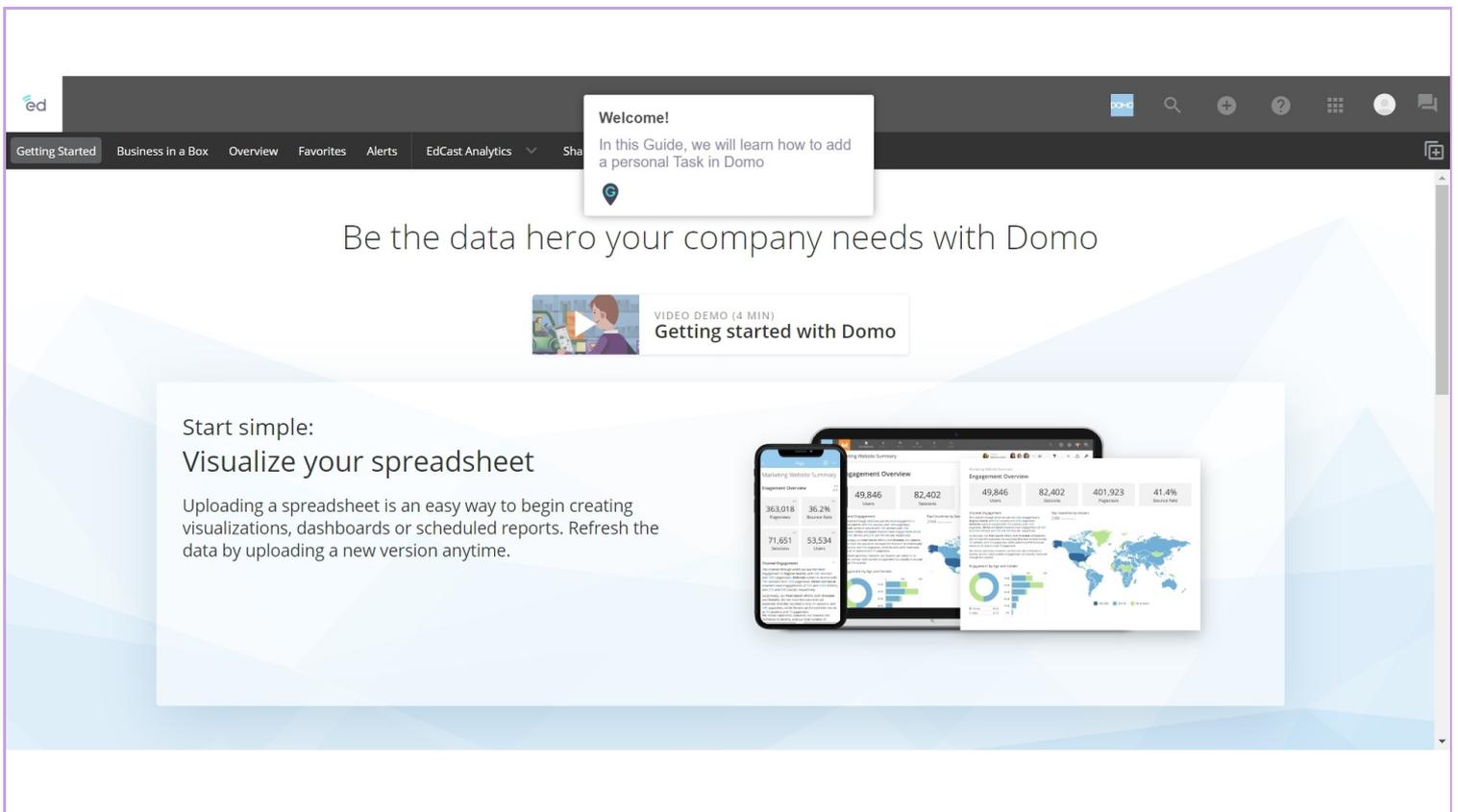


## How to Add a Personal Task in Domo

# Step: 01

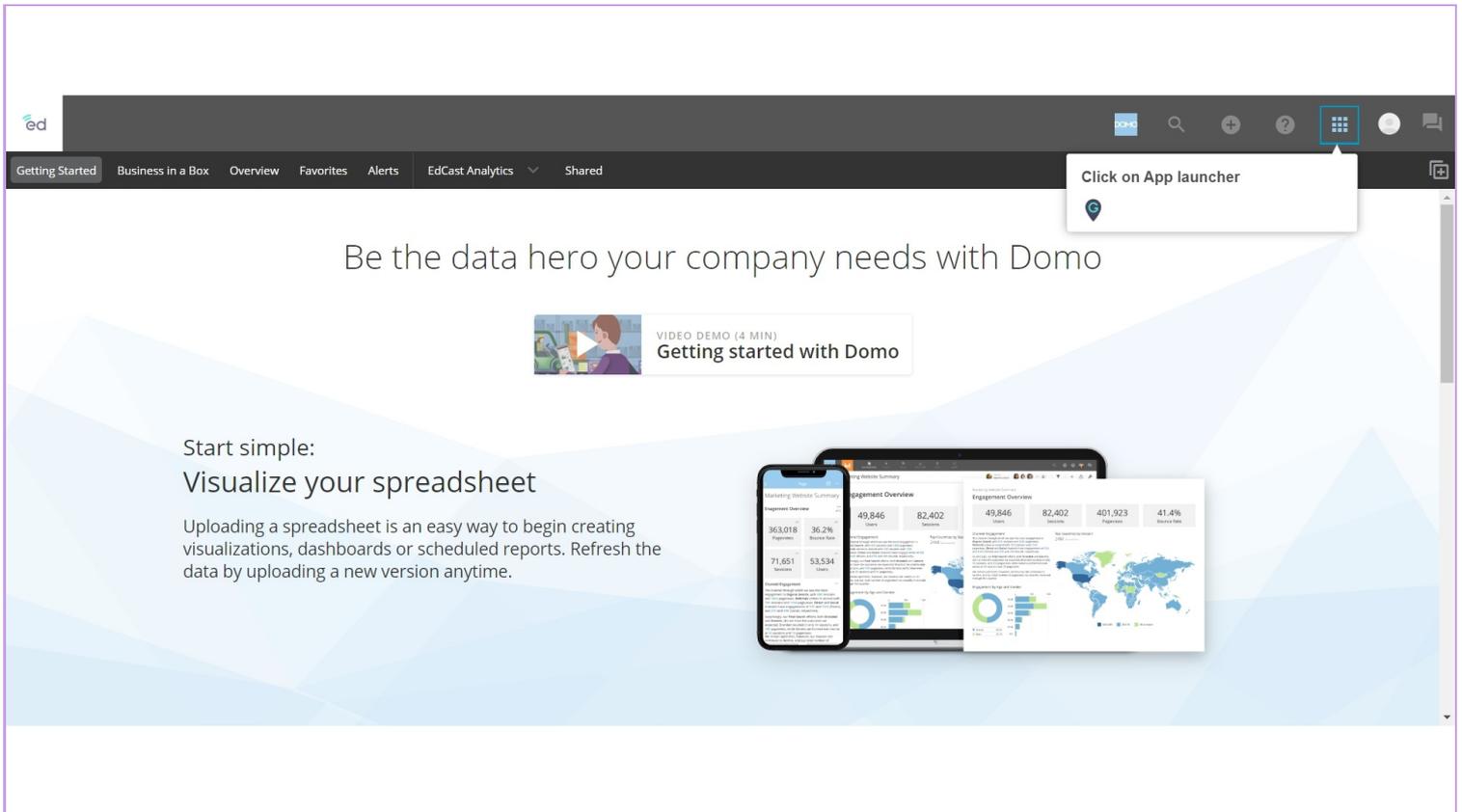
## Welcome!

In this Guide, we will learn how to add a personal Task in Domo



## Step: 02

Click on App launcher



The screenshot shows the Domo dashboard interface. At the top, there is a navigation bar with the 'ed' logo on the left and several icons on the right, including a search icon, a plus sign, a question mark, and an app launcher icon (a grid of dots). A callout box with a blue border and a white background points to the app launcher icon, containing the text 'Click on App launcher' and a small location pin icon. Below the navigation bar, the main content area features the headline 'Be the data hero your company needs with Domo'. To the left of the headline, there is a video player thumbnail with the text 'VIDEO DEMO (4 MIN) Getting started with Domo'. Below the headline, the text reads 'Start simple: Visualize your spreadsheet' followed by 'Uploading a spreadsheet is an easy way to begin creating visualizations, dashboards or scheduled reports. Refresh the data by uploading a new version anytime.' To the right of this text, there is a preview of a dashboard on a smartphone and a tablet. The dashboard displays various charts, including bar charts, a world map, and a table with data points. The table has columns for 'Engagement Overview' and 'New Customer Growth Rate'.

Getting Started Business in a Box Overview Favorites Alerts EdCast Analytics Shared

Click on App launcher

Be the data hero your company needs with Domo

VIDEO DEMO (4 MIN)  
Getting started with Domo

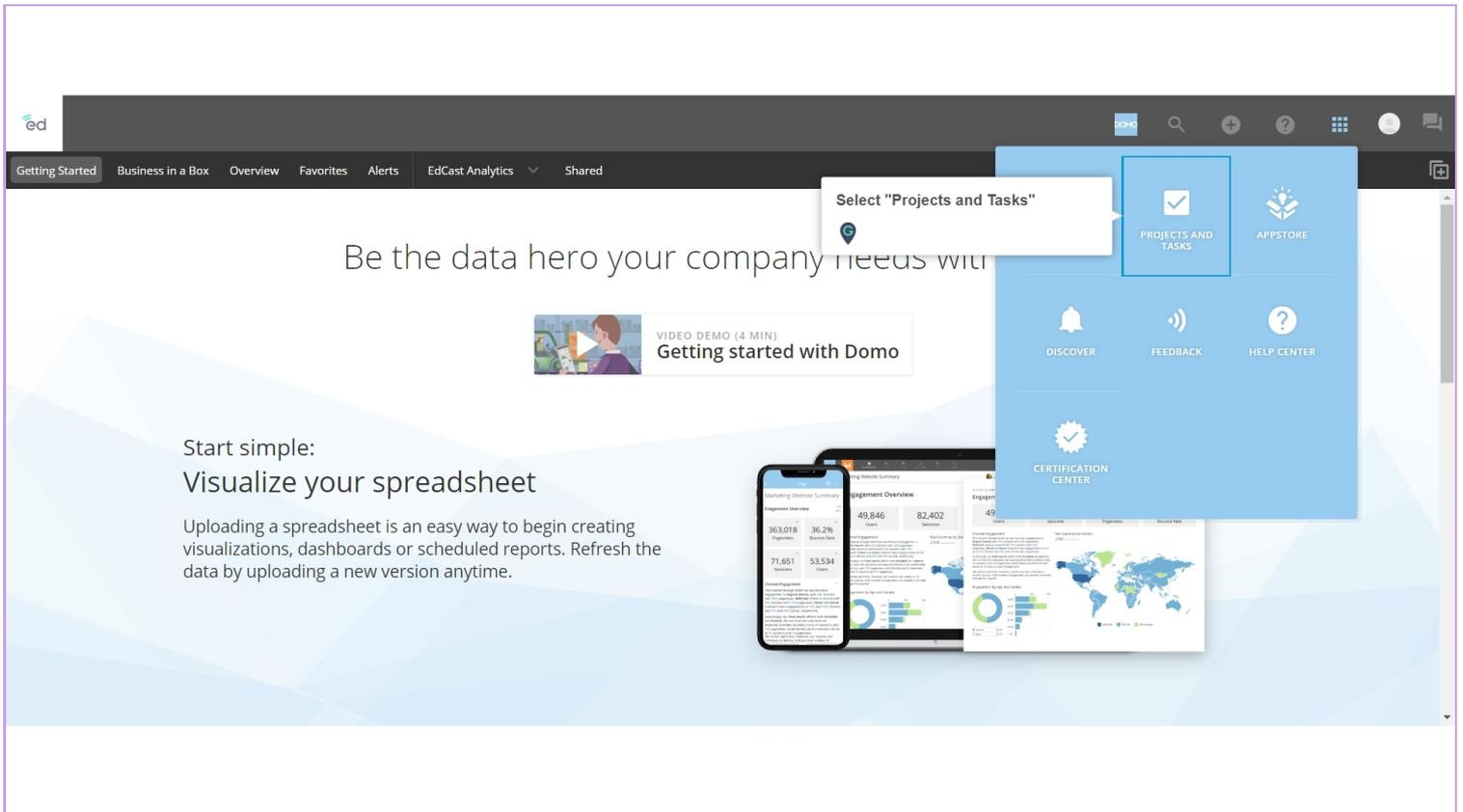
Start simple:  
Visualize your spreadsheet

Uploading a spreadsheet is an easy way to begin creating visualizations, dashboards or scheduled reports. Refresh the data by uploading a new version anytime.

Engagement Overview		Engagement Overview		New Customer Growth Rate	
Visits	Engagement	Visits	Engagement	Visits	Engagement
49,846	82,402	49,846	82,402	401,923	41.4%

## Step: 03

### Select "Projects and Tasks"



The screenshot shows the Domo dashboard interface. At the top, there is a navigation bar with the following items: Getting Started, Business in a Box, Overview, Favorites, Alerts, EdCast Analytics, and Shared. A search bar and several utility icons are also present. The main content area features a large heading: "Be the data hero your company needs with". Below this, there is a video player titled "VIDEO DEMO (4 MIN) Getting started with Domo". To the left, a section titled "Start simple: Visualize your spreadsheet" includes the text: "Uploading a spreadsheet is an easy way to begin creating visualizations, dashboards or scheduled reports. Refresh the data by uploading a new version anytime." To the right, a navigation menu is overlaid, containing the following options: PROJECTS AND TASKS (highlighted with a checkmark icon), APPSTORE, DISCOVER, FEEDBACK, HELP CENTER, and CERTIFICATION CENTER. A callout box points to the "PROJECTS AND TASKS" option with the text "Select 'Projects and Tasks'".

# Step: 04

Click on "Add task"

The screenshot shows a web application interface for 'Projects and Tasks'. At the top, there is a navigation bar with the 'ed' logo and several utility icons. Below the navigation bar, a breadcrumb trail includes 'Getting Started', 'Business in a Box', 'Overview', 'Favorites', 'Alerts', 'EdCast Analytics', and 'Shared'. The main heading is 'Projects and Tasks' with the subtitle 'Unleash the power of your organization'. A search bar labeled 'Filter projects' is positioned to the right of the heading. The interface is divided into three main sections: 'Your tasks', 'Your projects', and 'All company projects'. The 'Your tasks' section contains two rows: 'Your personal tasks' and 'Tasks that you have assigned', each with '0 Open' and '0 Closed' indicators. An orange 'ADD TASK' button is located to the right of this section, with a callout box pointing to it that says 'Click on "Add task"'. The 'Your projects' section shows 'No available projects' and an 'ADD PROJECT' button. The 'All company projects' section lists 'CEO Dashboard' and 'PMO', each with '0 Open' and '0 Closed' indicators.

## Step: 05

Enter "Task name"

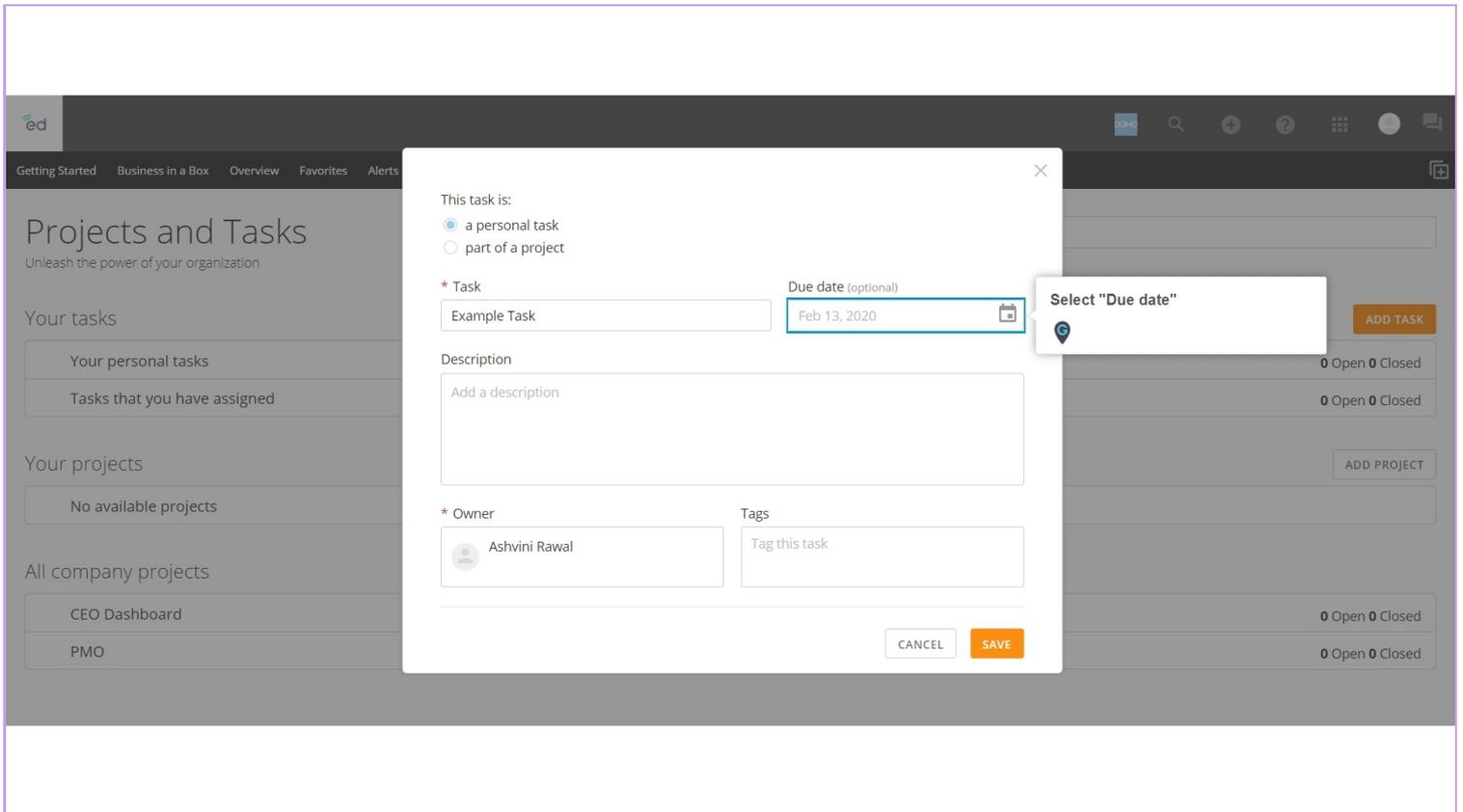
The screenshot displays a web interface for managing tasks. A modal window titled "Projects and Tasks" is open, allowing the user to create a new task. The modal contains the following elements:

- This task is:** Radio buttons for "a personal task" (selected) and "part of a project".
- \* Task:** A text input field with the placeholder "Enter task name". A tooltip above this field says "Enter 'Task name'".
- Description:** A text area with the placeholder "Add a description".
- \* Owner:** A dropdown menu showing "Ashvini Rawal".
- Tags:** A text input field with the placeholder "Tag this task".
- Buttons:** "CANCEL" and "SAVE" buttons at the bottom right.
- Footer:** A note "\* Indicates required field".

The background shows a sidebar with navigation options like "Getting Started", "Business in a Box", "Overview", "Favorites", and "Alerts". The main content area lists "Your tasks" (personal and assigned), "Your projects" (none available), and "All company projects" (CEO Dashboard, PMO).

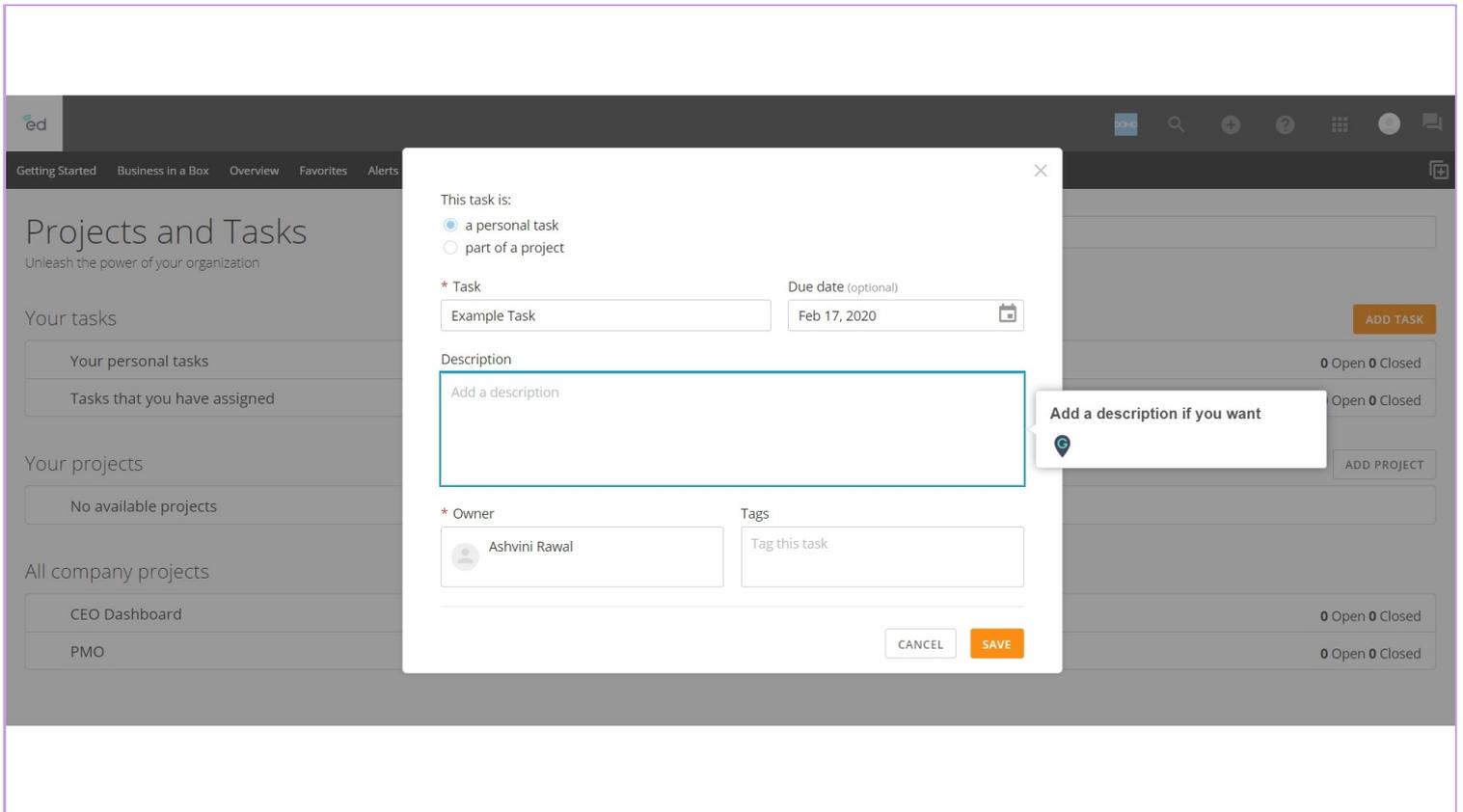
# Step: 06

## Select "Due date"



## Step: 07

### Add a description if you want



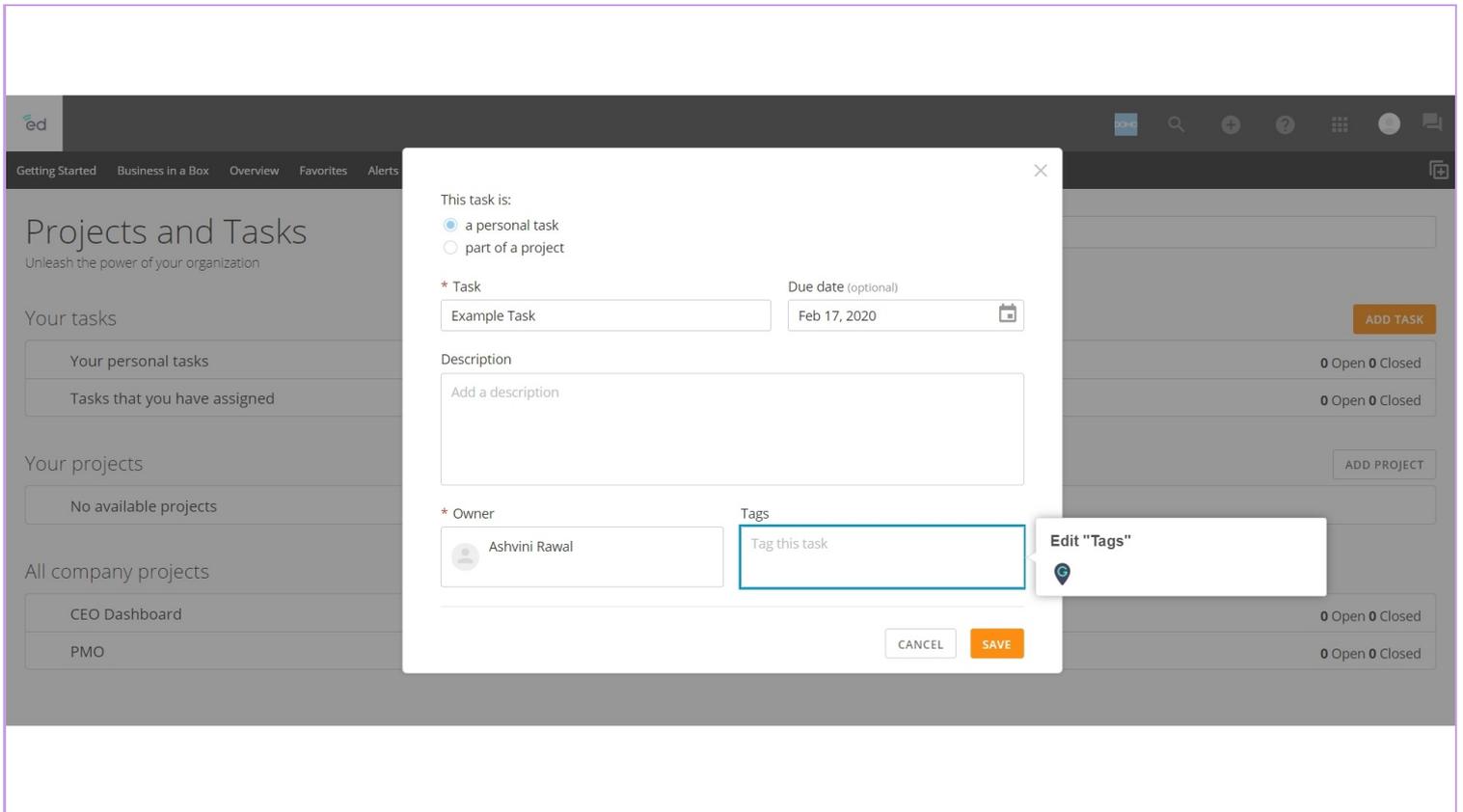
The screenshot displays a web application interface for managing tasks. A modal window is open for creating a new task. The modal contains the following elements:

- This task is:** Two radio buttons:  a personal task and  part of a project.
- \* Task:** A text input field containing "Example Task".
- Due date (optional):** A date input field containing "Feb 17, 2020" with a calendar icon.
- Description:** A large text area with the placeholder text "Add a description". This field is highlighted with a blue border.
- \* Owner:** A dropdown menu showing "Ashvini Rawal" with a user icon.
- Tags:** A text input field with the placeholder "Tag this task".
- Buttons:** "CANCEL" and "SAVE" buttons at the bottom right of the modal.

A callout box with a location pin icon and the text "Add a description if you want" is positioned over the description field. The background shows a sidebar with navigation options like "Getting Started", "Business in a Box", "Overview", "Favorites", and "Alerts". The main content area is titled "Projects and Tasks" and lists various task and project categories.

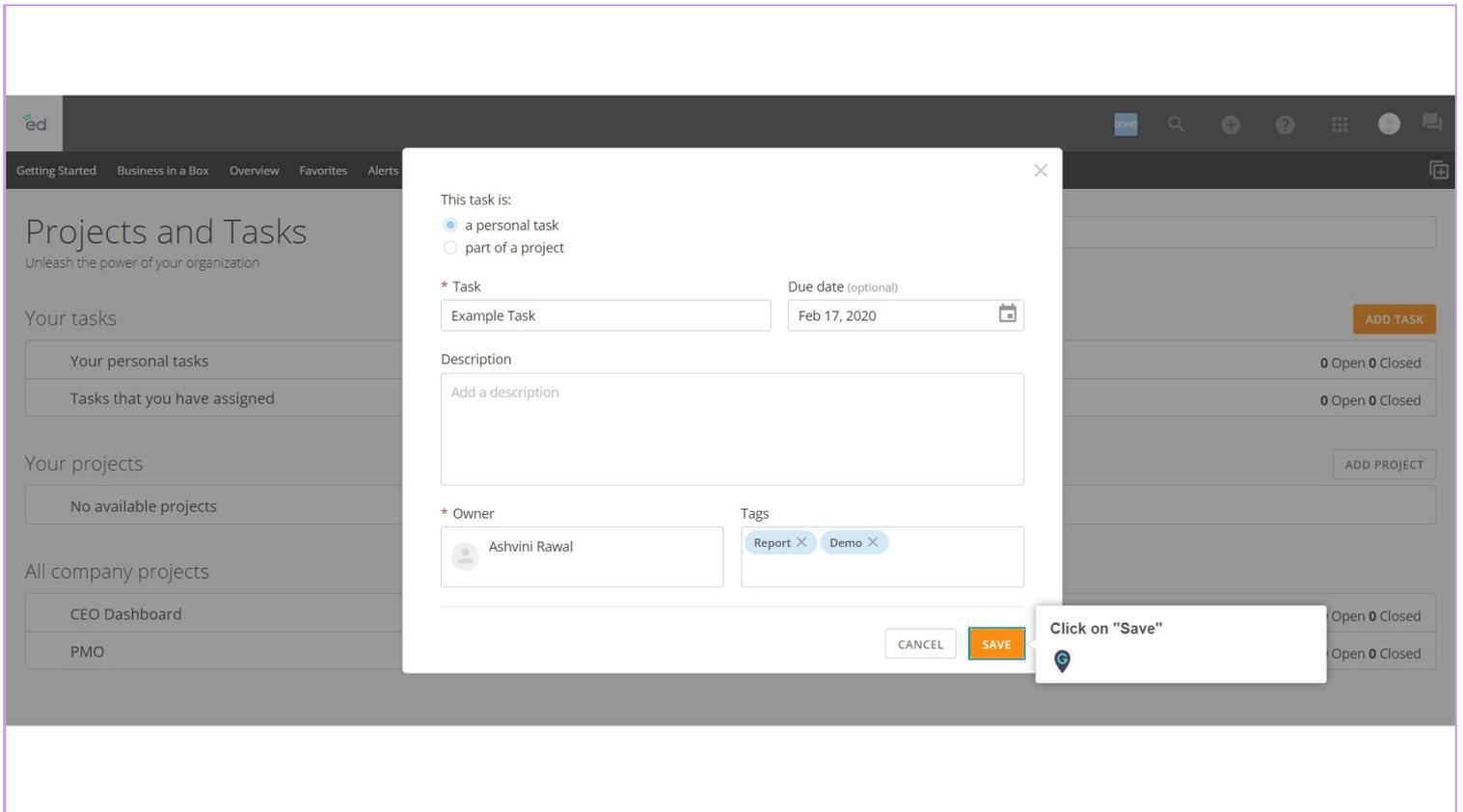
# Step: 08

## Edit "Tags"



# Step: 09

Click on "Save"



# Step: 10

## Task has been added!

The screenshot shows a web application interface for 'Projects and Tasks'. At the top, a dark navigation bar contains the 'ed' logo, a search bar, and several utility icons. A white notification box in the center of the navigation bar displays the message 'Task has been added!'. Below the navigation bar, the main content area is titled 'Projects and Tasks' with the subtitle 'Unleash the power of your organization'. A search bar labeled 'Filter projects' is positioned to the right of the title. The interface is divided into three main sections: 'Your tasks', 'Your projects', and 'All company projects'. The 'Your tasks' section features a blue header with a red notification icon and the text 'Your personal tasks', followed by a sub-section 'Tasks that you have assigned'. The 'Your projects' section has a header 'Your projects' and a sub-section 'No available projects'. The 'All company projects' section lists two items: 'CEO Dashboard' and 'PMO'. Each task or project entry includes a status indicator showing the number of 'Open' and 'Closed' items. An 'ADD TASK' button is located in the top right of the 'Your tasks' section, and an 'ADD PROJECT' button is in the top right of the 'Your projects' section.

Section	Item	Open	Closed
Your tasks	Your personal tasks	1	0
	Tasks that you have assigned	0	0
Your projects	No available projects	-	-
All company projects	CEO Dashboard	0	0
	PMO	0	0

# Thank You!

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