

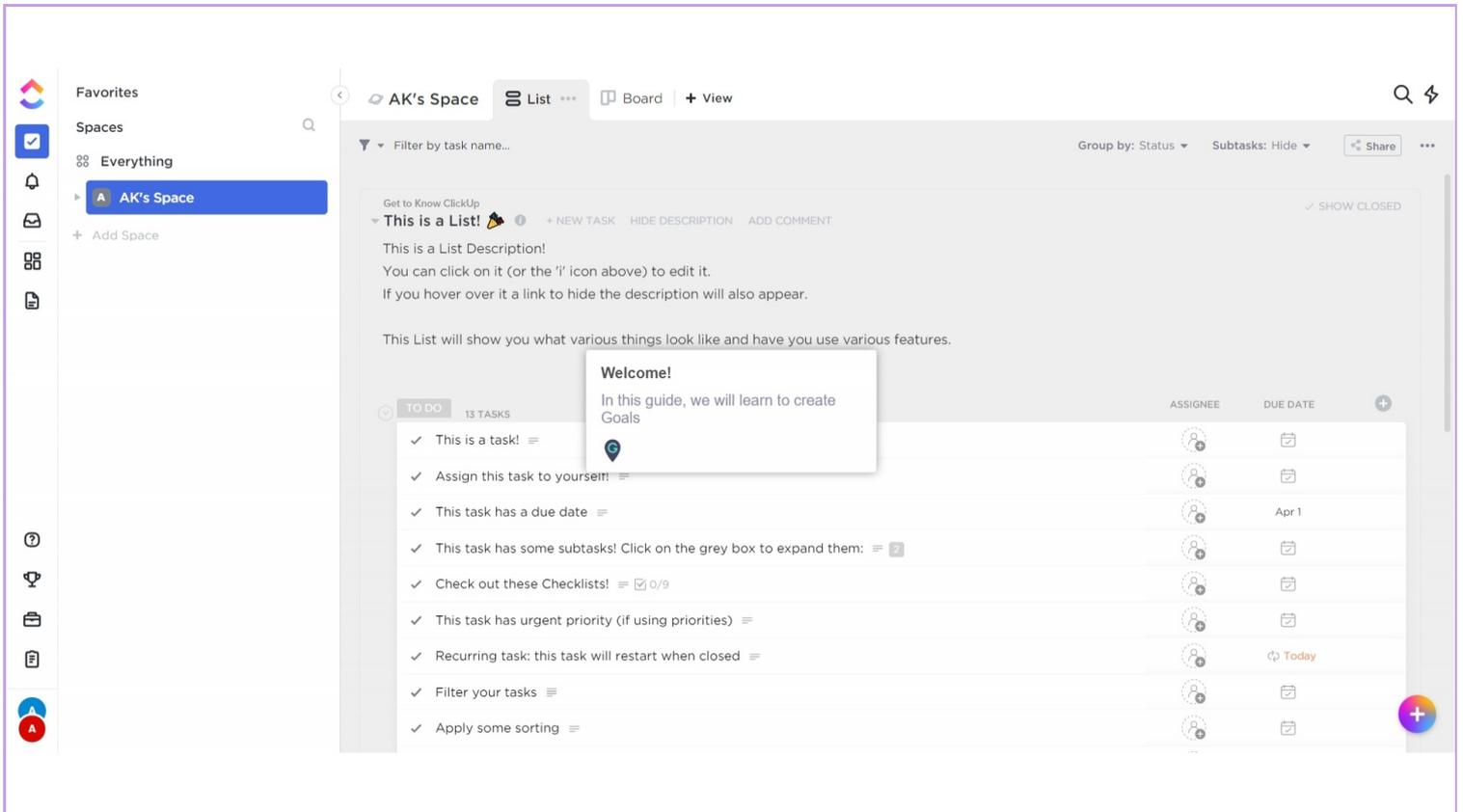


How to create a Goal in ClickUp

Step: 01

Welcome!

In this guide, we will learn to create Goals



Step: 02

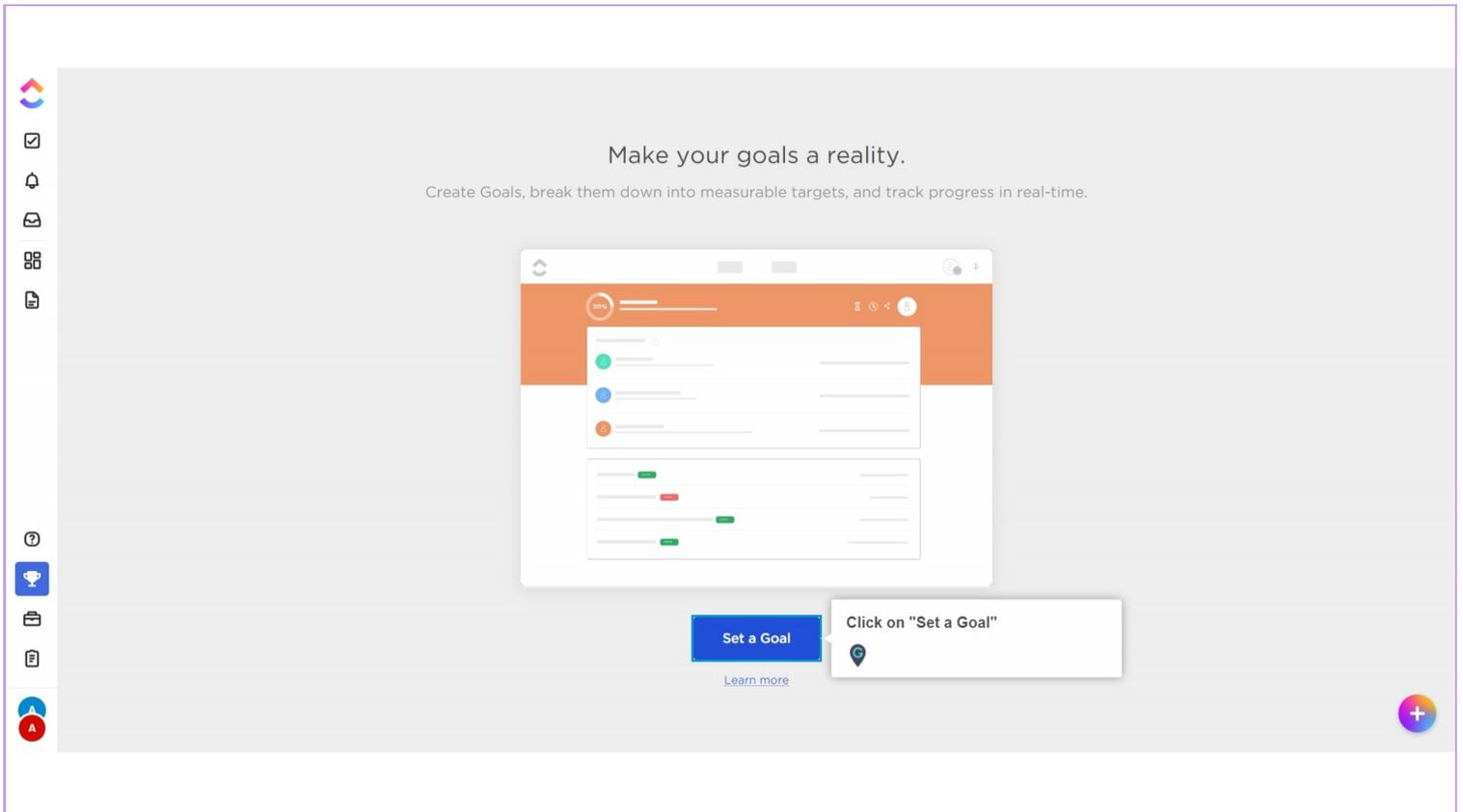
Click the trophy icon

The screenshot displays the myGuide application interface. On the left sidebar, there is a 'Goals' section with a trophy icon. A callout box with the text 'Click the trophy icon' points to this icon. The main content area shows 'AK's Space' in 'List' view. A task titled 'This is a List!' is expanded, showing a description and a list of 13 tasks. The tasks are listed in a table with columns for 'TO DO', 'ASSIGNEE', and 'DUE DATE'. The tasks include: 'This is a task!', 'Assign this task to yourself!', 'This task has a due date', 'This task has some subtasks!', 'Check out these Checklists!', 'This task has urgent priority', 'Recurring task: this task will restart when closed', 'Filter your tasks', and 'Apply some sorting'.

TO DO	ASSIGNEE	DUE DATE
✓ This is a task!	[Avatar]	[Calendar]
✓ Assign this task to yourself!	[Avatar]	[Calendar]
✓ This task has a due date	[Avatar]	Apr 1
✓ This task has some subtasks! Click on the grey box to expand them:	[Avatar]	[Calendar]
✓ Check out these Checklists! 0/9	[Avatar]	[Calendar]
✓ This task has urgent priority (if using priorities)	[Avatar]	[Calendar]
✓ Recurring task: this task will restart when closed	[Avatar]	Today
✓ Filter your tasks	[Avatar]	[Calendar]
✓ Apply some sorting	[Avatar]	[Calendar]

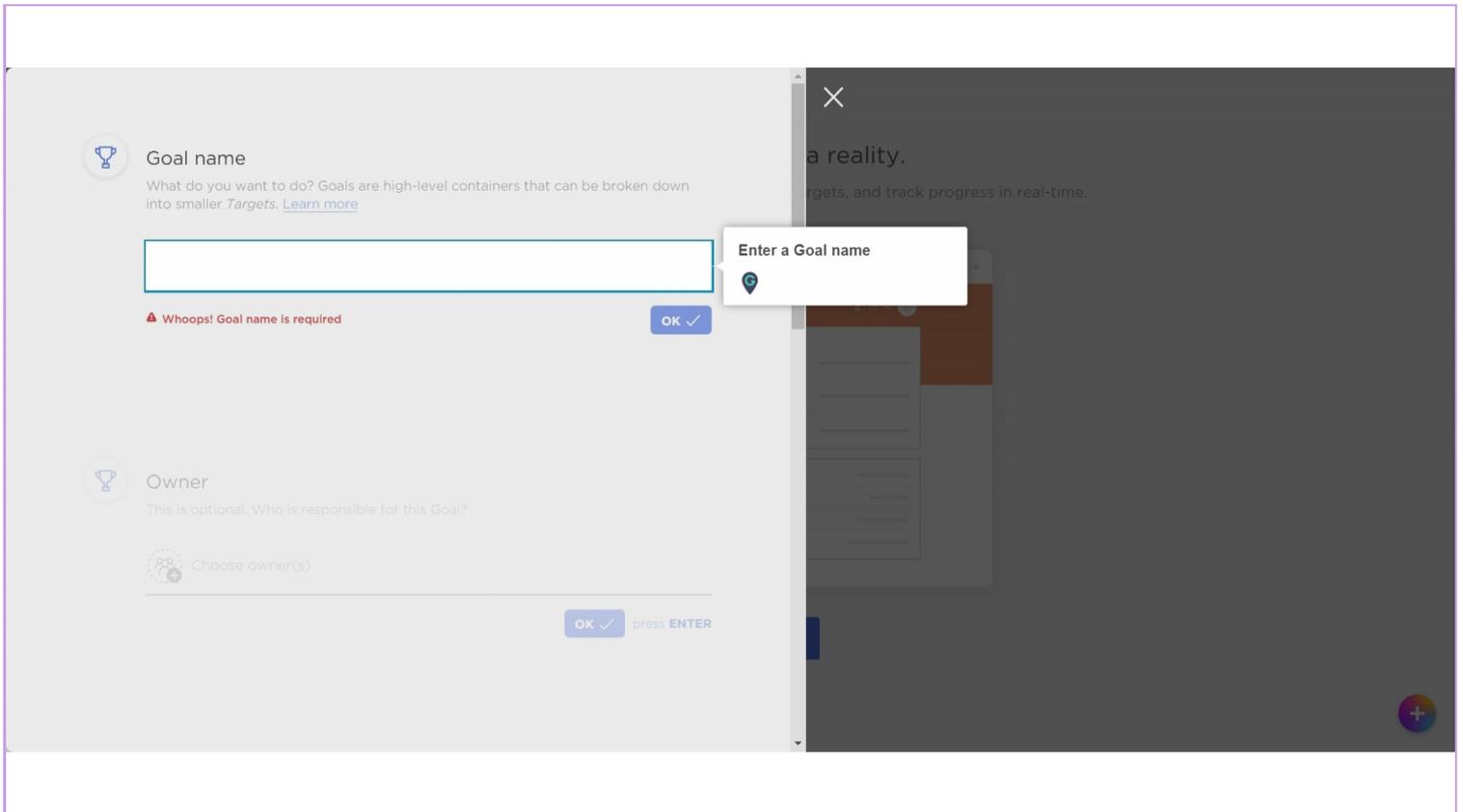
Step: 03

Click on "Set a Goal"



Step: 04

Enter a Goal name



The screenshot shows a web form for creating a goal. The form is divided into two sections: "Goal name" and "Owner".

Goal name section:

- Icon: Trophy
- Title: Goal name
- Description: What do you want to do? Goals are high-level containers that can be broken down into smaller *Targets*. [Learn more](#)
- Input field: An empty text box with a blue border.
- Error message: **Whoops! Goal name is required** (with a red triangle icon).
- Action button: **OK ✓**

Owner section:

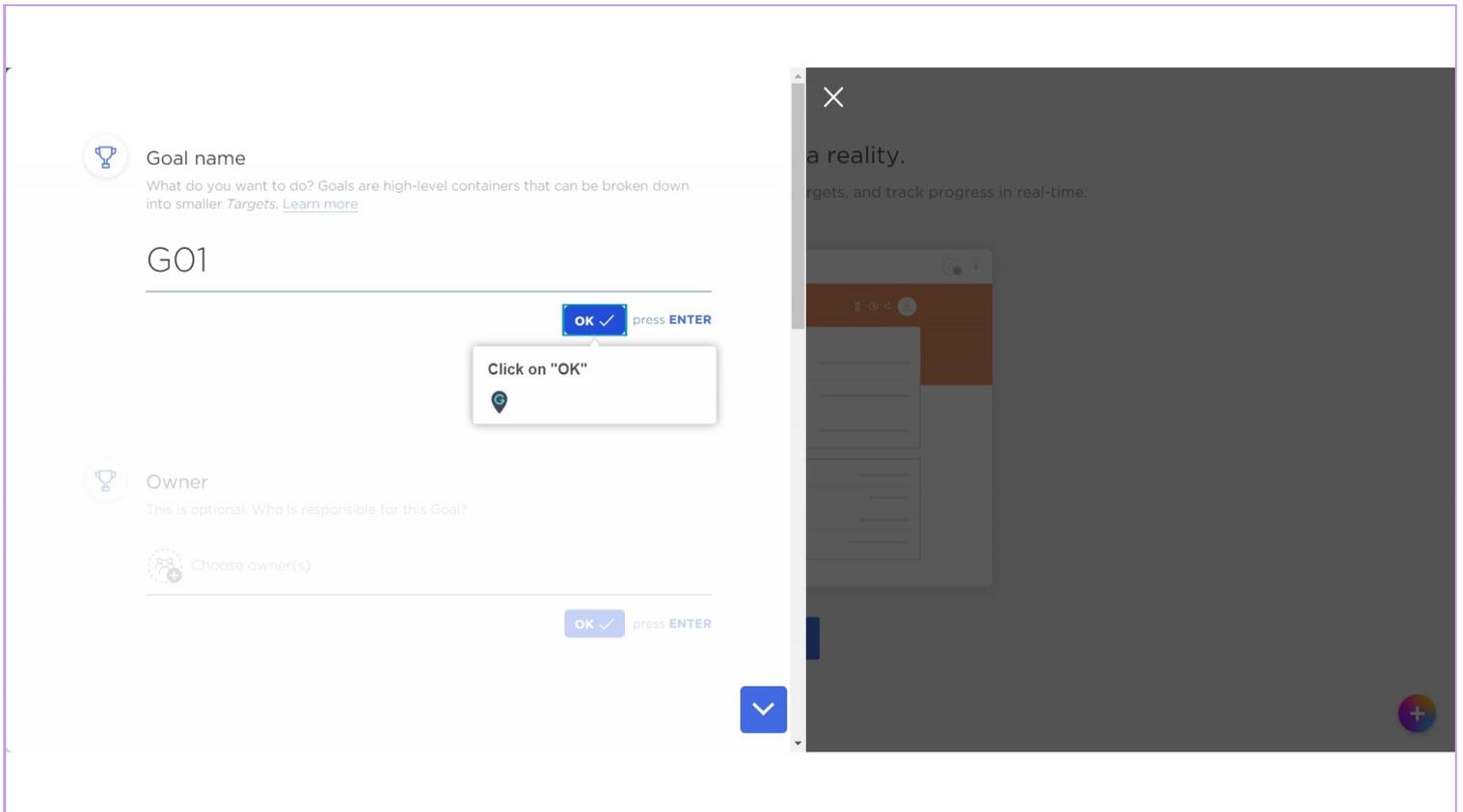
- Icon: Trophy
- Title: Owner
- Description: This is optional. Who is responsible for this Goal?
- Input field: "Choose owner(s)" with a group of people icon.
- Action button: **OK ✓** press ENTER

Tooltip: A white tooltip with a location pin icon and the text "Enter a Goal name" is positioned over the empty input field.

The background shows a blurred view of a dashboard with a close button (X) and some text like "a reality." and "targets, and track progress in real-time."

Step: 05

Click on "OK"



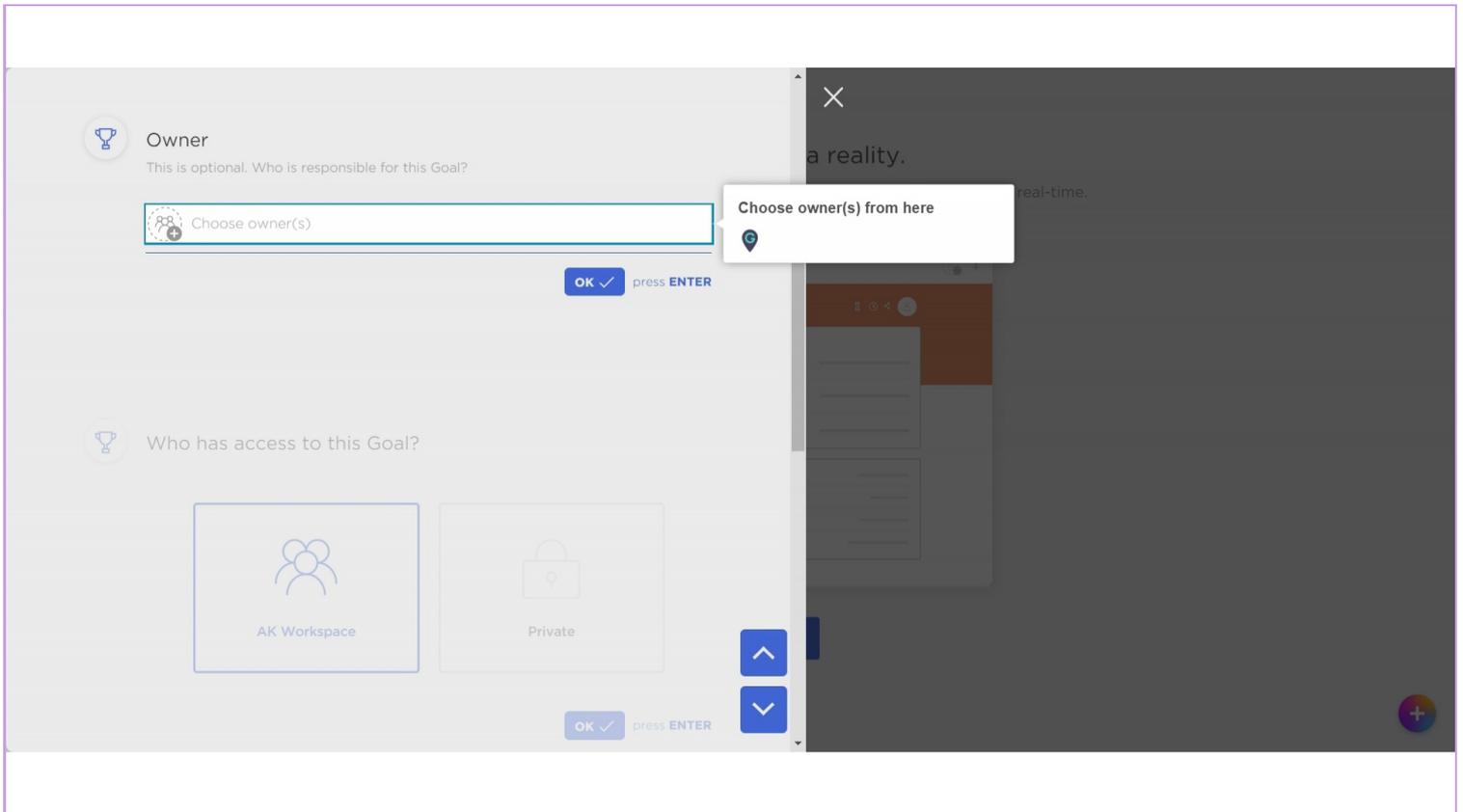
The screenshot shows a web interface for creating a goal. It features two main sections: "Goal name" and "Owner".

- Goal name:** Includes a trophy icon, the text "Goal name", and a description: "What do you want to do? Goals are high-level containers that can be broken down into smaller *Targets*. [Learn more](#)". Below this is a text input field containing "G01". To the right of the input field is a blue button with "OK ✓" and "press ENTER". A tooltip with a location pin icon and the text "Click on 'OK'" points to this button.
- Owner:** Includes a trophy icon, the text "Owner", and a description: "This is optional. Who is responsible for this Goal?". Below this is a "Choose owner(s)" section with a group of people icon and a text input field. To the right of the input field is another blue button with "OK ✓" and "press ENTER".

The right side of the image shows a blurred background of a mobile application interface with a close button (X) at the top.

Step: 06

Choose owner(s) from here



Step: 07

Again, click "OK"

The screenshot displays the 'Owner' configuration screen in the myGuide application. The screen is titled 'Owner' and includes the instruction 'This is optional. Who is responsible for this Goal?'. Below this, there is a 'Choose owner(s)' section with a search bar and a list of users. A blue 'OK' button with a checkmark and the text 'press ENTER' is visible. A callout box with a location pin icon and the text 'Again, click "OK"' points to the 'OK' button. Below the 'Owner' section, there is a 'Who has access to this Goal?' section with two options: 'AK Workspace' (represented by a group of people icon) and 'Private' (represented by a lock icon). A second 'OK' button with a checkmark and 'press ENTER' is located at the bottom right of the screen. The background shows a blurred view of the main application interface with a close button (X) in the top right corner.

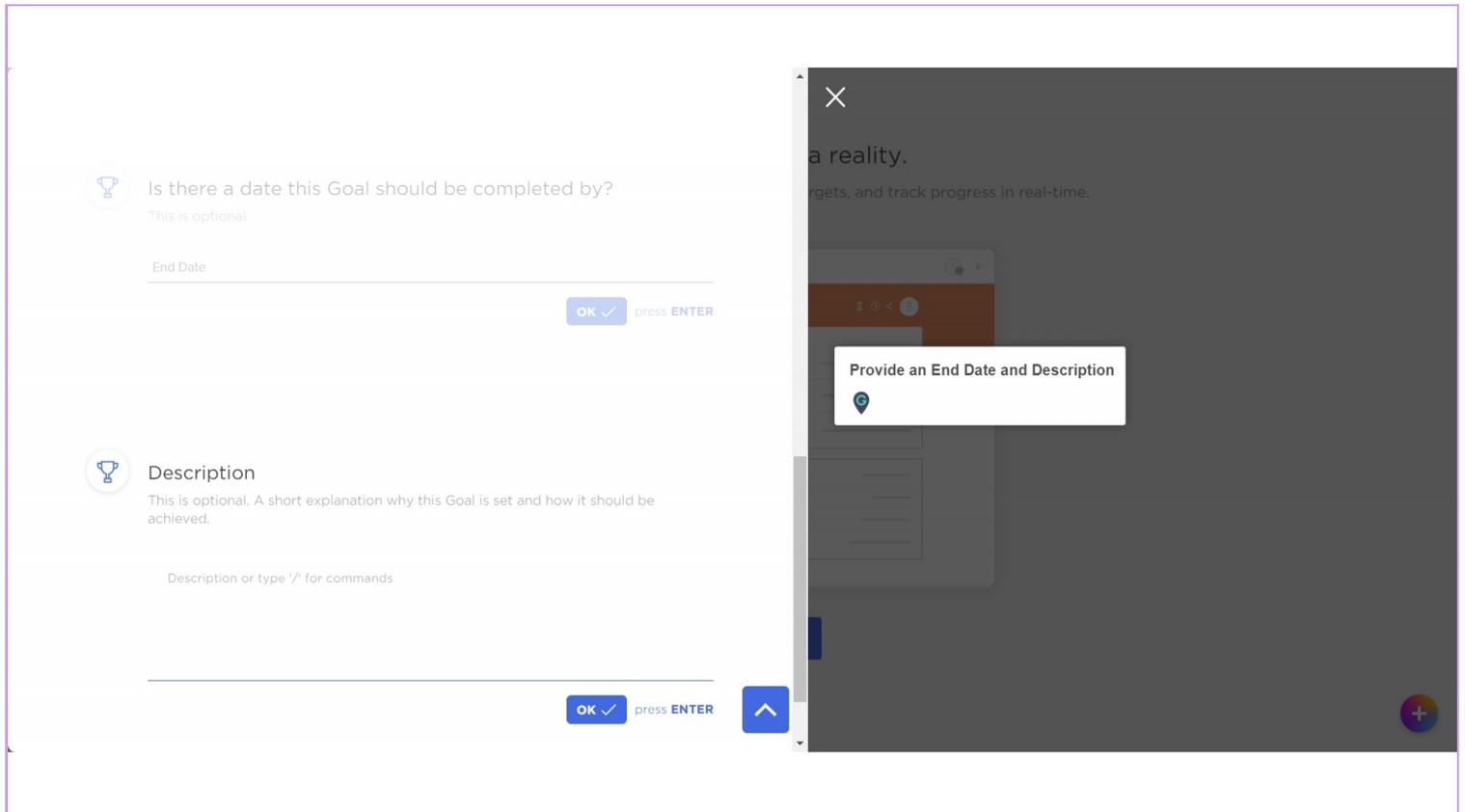
Step: 08

Select "Who has access to this Goal?"

The screenshot displays a user interface for configuring a goal. At the top, a search bar contains the text "Who has access to this Goal?". Below the search bar are two selection options: "AK Workspace" (represented by an icon of three people) and "Private" (represented by a lock icon). A blue "OK ✓" button with the text "press ENTER" is positioned below these options. A small white tooltip with a close button (X) and a location pin icon is visible, containing the text "Select 'Who has access to this Goal?'". Below the selection options, there is a question: "Is there a date this Goal should be completed by?" followed by the subtext "This is optional". Underneath this question is an "End Date" input field. A blue "OK ✓" button with the text "press ENTER" is located below the input field. On the right side of the interface, there are two blue arrow buttons, one pointing up and one pointing down. The background of the interface is dark grey, and a blurred screenshot of a document is visible behind the main content area.

Step: 09

Provide an End Date and Description



The image shows a user interface for creating a goal. It features two main input sections: 'End Date' and 'Description'. The 'End Date' section has a text input field and an 'OK ✓ press ENTER' button. The 'Description' section has a text input field and an 'OK ✓ press ENTER' button, along with an upward arrow button. A modal window is overlaid on the right side, containing a close button (X), a title 'Provide an End Date and Description', and a location pin icon. The background of the modal is dark and semi-transparent, showing a blurred view of the underlying application.

Is there a date this Goal should be completed by?
This is optional

End Date

OK ✓ press ENTER

Description

This is optional. A short explanation why this Goal is set and how it should be achieved.

Description or type '/' for commands

OK ✓ press ENTER

Provide an End Date and Description

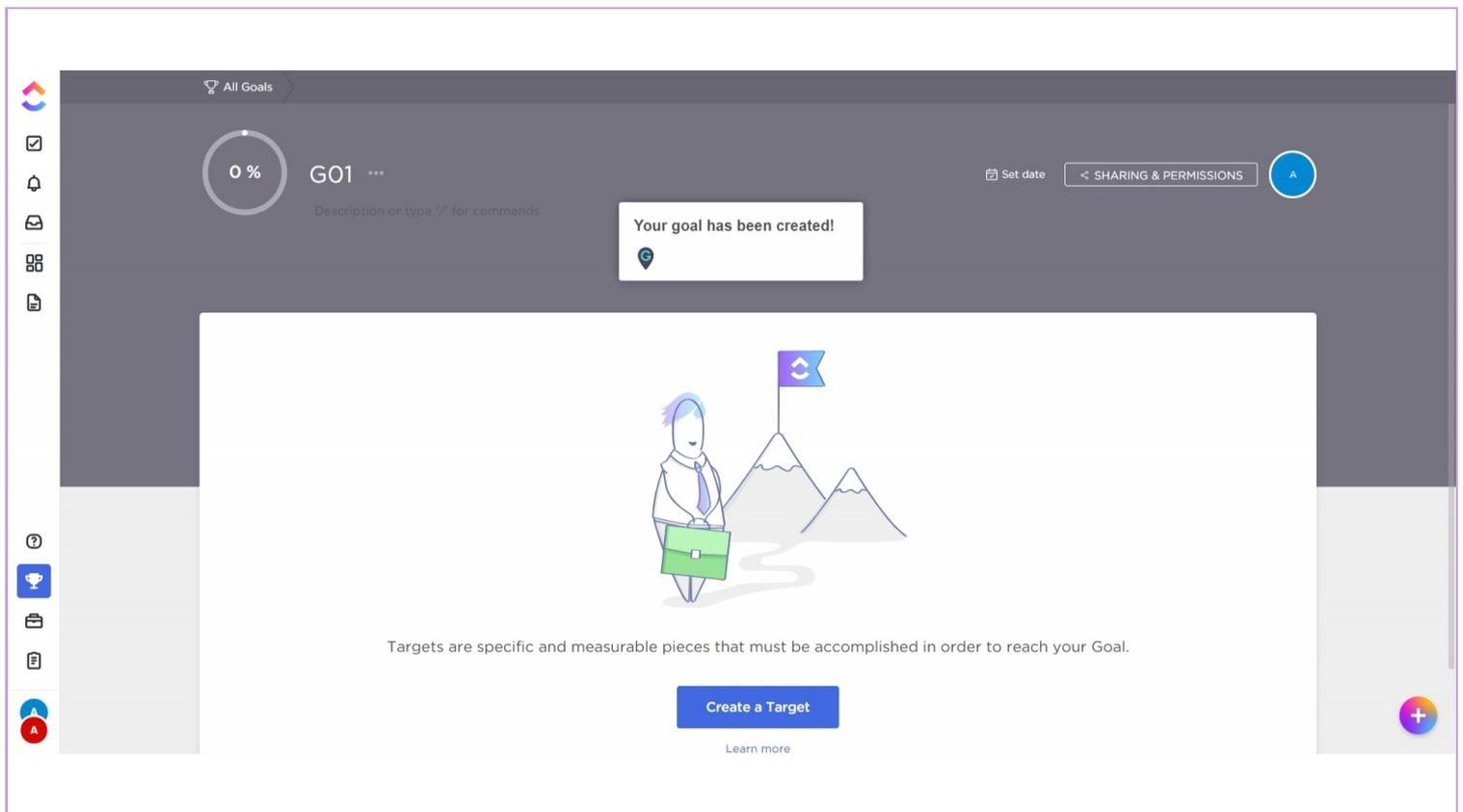
Step: 10

Click on "OK"

The screenshot shows a user interface for creating a goal. It features two main sections: 'Is there a date this Goal should be completed by?' and 'Description'. Both sections have a text input field and an 'OK' button with a checkmark and the text 'press ENTER'. A tooltip with a location pin icon and the text 'Click on "OK"' is positioned over the 'OK' button in the 'Description' section. To the right, a dark sidebar menu is visible with a close button (X) and several menu items: 'Updated', 'Name', 'Due date', 'Start Date', 'Progress', and 'Show archived'. A blue arrow button is located at the bottom of the main content area.

Step: 11

Your goal has been created!



The screenshot displays the myGuide application interface. At the top, a navigation bar includes a search icon, a 'All Goals' dropdown, and a user profile icon. Below this, a goal card for 'G01' is shown with a '0%' progress indicator and a 'Description or type /? for commands' field. A notification box in the center reads 'Your goal has been created!' with a location pin icon. The main content area features an illustration of a person with a briefcase standing on a path leading to a mountain peak with a flag. Below the illustration, the text states: 'Targets are specific and measurable pieces that must be accomplished in order to reach your Goal.' A blue button labeled 'Create a Target' is prominently displayed, with a 'Learn more' link underneath. The interface also includes a left sidebar with various icons and a right sidebar with a 'SHARING & PERMISSIONS' button and a user profile icon.

Thank You!

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