Quick Start Guide

CREATING A TASK



Tasks Tab

Create To-Do Lists with this function to track important reminders like upcoming travel, birthdays, deposit deadlines, passport expiration dates, and anniversaries.

Create a Task

Select the pink + sign in the upper right-hand corner to create a new task or reminder item.





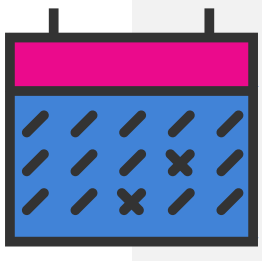
Tasks & Reminders Form

Enter a title, date, description, and progress status (*not started, in progress, pending, canceled, or complete*), and mark if the task status is active or done.

Editing a Task

To modify a task, hover your cursor over the task title in the Tasks tab until the ellipsis appears on the left. From there, you can choose to edit or duplicate the task.





Reminder

Your task will appear in the calendar for easy access. Tasks are automatically generated based on information such as reservation details and more.