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| This workbook belongs to: |  |
| Email address: |  |

**ClickUp Planning Training Workbook**

Please answer all questions as clearly and completely as possible. Take your time to reflect on each topic. This workbook is part of your training and should be completed **after watching the full video**.

**General Understanding**

**Question 1:**
What is the purpose of the weekly planning in ClickUp?

**My Answer:**

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**Question 2:**Where can you find the weekly planning in ClickUp?

**My Answer:**

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**Question 3:**What is the difference between "List view" and "Workload view"? Which one is preferred and why?

**My Answer:**

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**Question 3:**Why is it important to check if your week starts on Monday? Where can you adjust this setting?

**My Answer:**

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**Tasks and Assignments**

**Question 4:**How can you check which tasks are assigned to you in the weekly planning?

**My Answer:**

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**Question 5:**What should you do if you don’t see any tasks assigned to you?

**My Answer:**

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**Question 6:**What is the meaning of the “unassigned” section, and do you need to take any action on these tasks?

**My Answer:**

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**Question 7:**How can you check which other agents are assigned to the same task as you?

**My Answer:**

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**Mail Count and Task Updates**

**Question 8:**What counts as a "processed mail"? List all possible actions that are considered processed.

**My Answer:**

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**Question 9:**Describe step-by-step how to update the mail count in ClickUp after finishing a task.

**My Answer:**

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**Question 10:**What should you do if your colleague has already added a mail count to a shared task, and you also need to add yours?

**My Answer:**

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**Access and Communication**

**Question 11:**What is the correct procedure if you are assigned to a new project but don’t have access to MSD, Bitrix, Time Doctor, or ClickUp for that project?

**My Answer:**

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**Question 12:**Why is it important to request access immediately when you see a new project?

**My Answer:**

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**Question 13:**Where can you check for daily updates or last-minute changes in your planning?

**My Answer:**

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**Rules and Important Notes**

**Question 14:**Which actions are strictly forbidden when working with ClickUp planning?

**My Answer:**

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**Question 15:**What will happen if you make unauthorized changes in ClickUp?

**My Answer:**

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**Reflection**

**Question 16:**What are the most important things you have learned from this training?

**My Answer:**

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**Question 17:**Do you feel confident in using ClickUp for your weekly planning? If not, what would you like more explanation about?

**My Answer:**

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**Question 18:**What steps will you take to ensure you follow the correct process every day?

**My Answer:**

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**Final Step**

✅ When you finish this workbook, please email it to: jobs@xplodemedia.nl

Thank you for your effort and attention!