

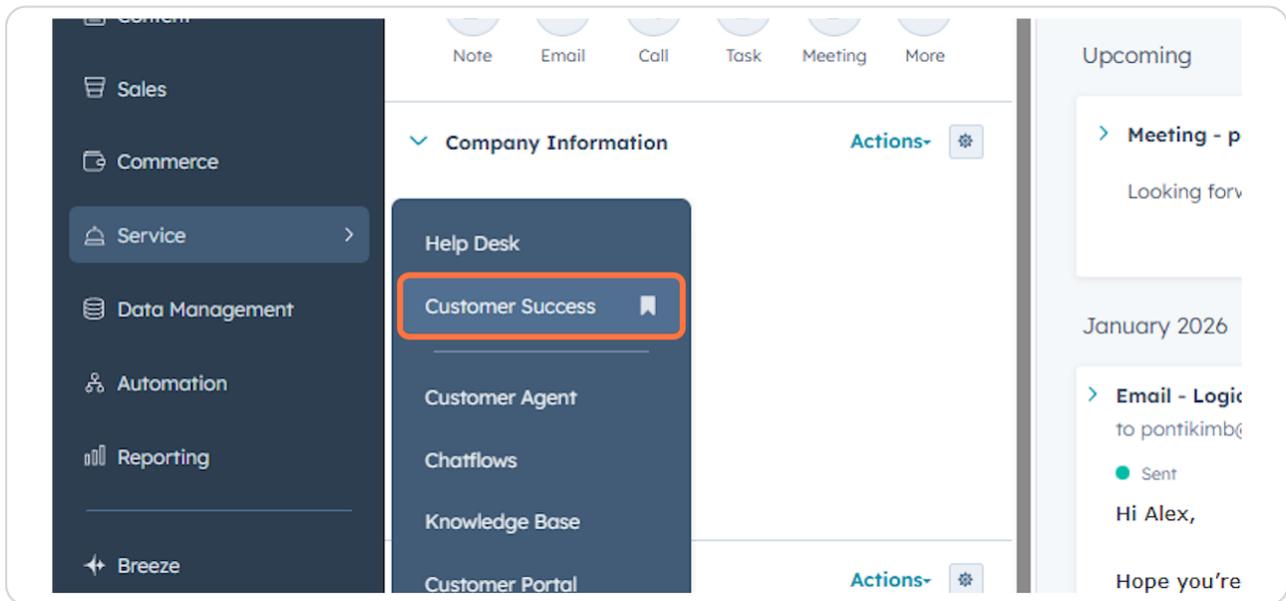
Using The Customer Success Workspace

17 Steps [View most recent version on Tango.ai](#) 

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|------------------|---------------|--------------|
| Created by | Creation Date | Last Updated |
| Logical Position | Jan 13, 2026 | Jan 13, 2026 |

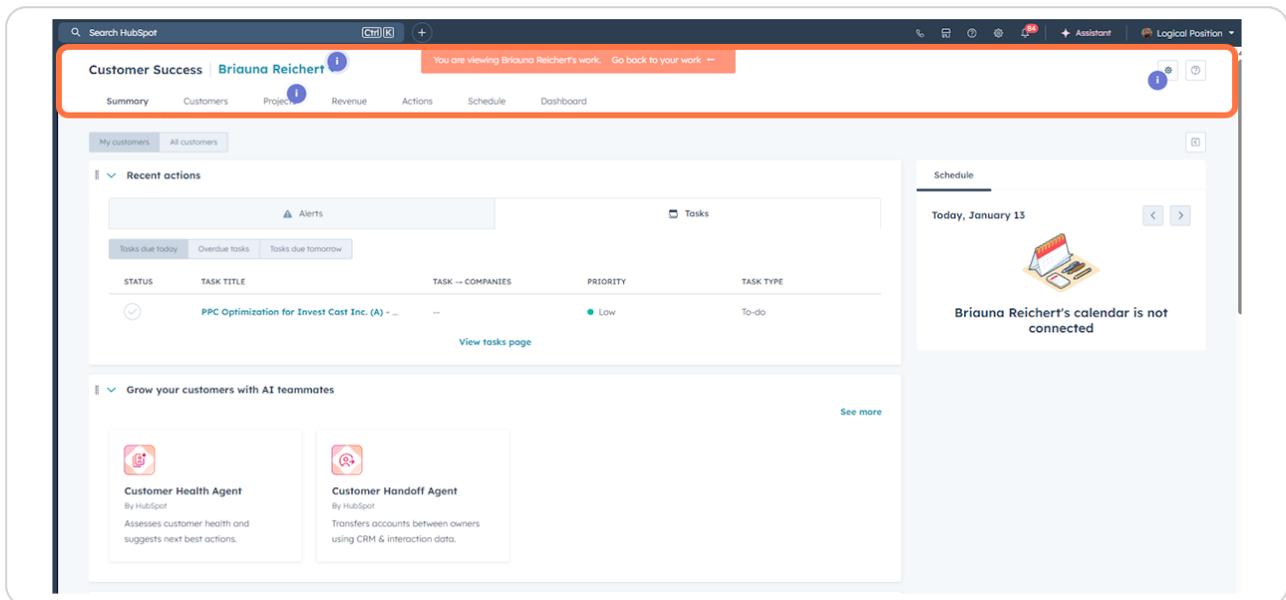
STEP 1

You can navigate to the Customer Success dashboard by selecting Service > Customer Success from the left side navigation bar. Bookmark the page by using the Bookmark icon on the Customer Success selection.



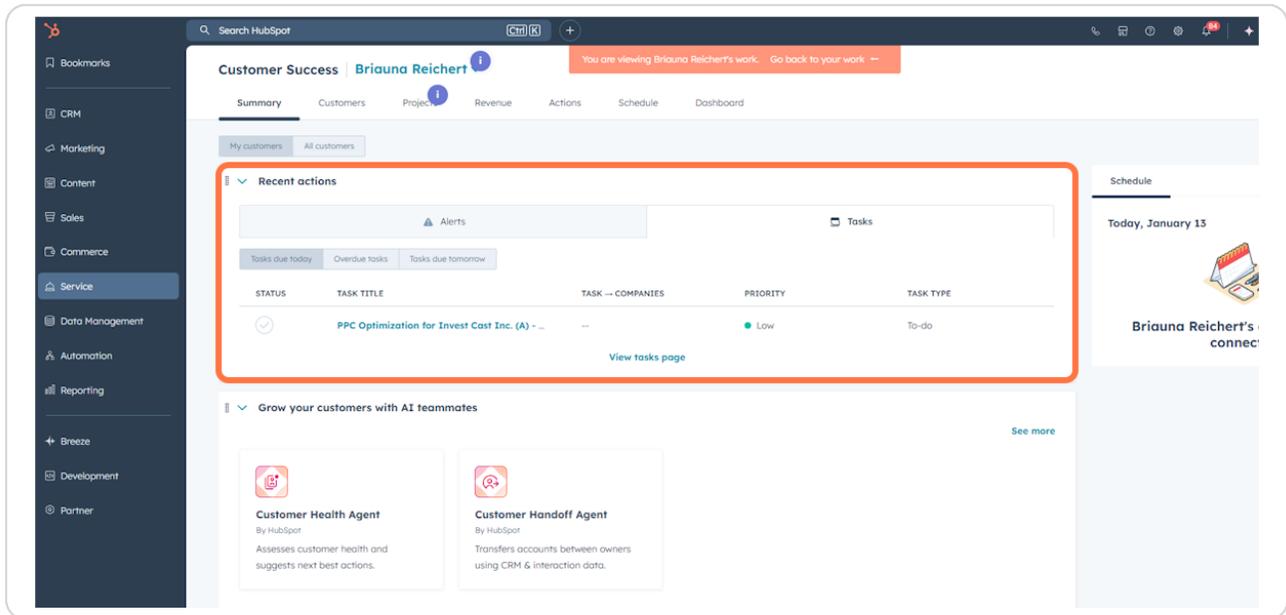
STEP 2

The Customer Success workspace will default to the Summary tab. You should see your own name at the top of the page.



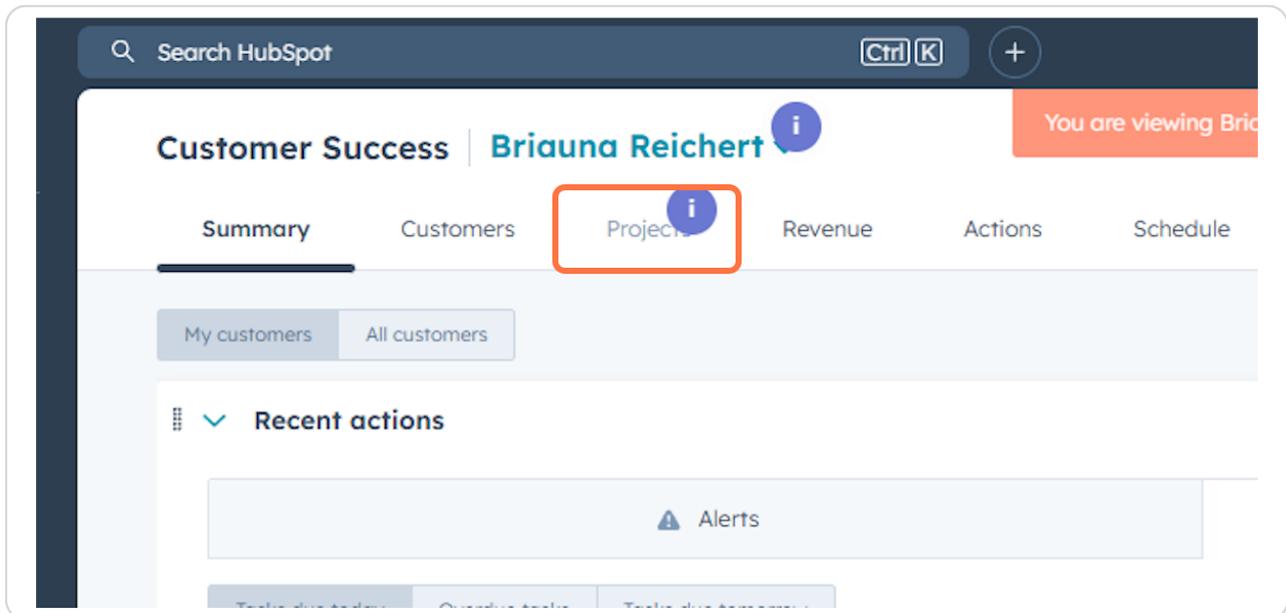
STEP 3

On the Summary tab, you'll have a quick view of tasks assigned to you due today. You can also toggle to Overdue tasks or tasks due tomorrow from this view.



STEP 4

Navigate over to the Projects tab



STEP 5

Here you can see a list of all Project records that you are assigned to

The screenshot shows a dashboard with a navigation bar at the top containing 'Summary', 'Customers', 'Projects', 'Revenue', 'Actions', 'Schedule', and 'Dashboard'. The main content area is titled 'Owned by me' and shows 81 records. A sidebar on the left displays 'Owned by me' with 81 records and 'All Projects' with 3.6K records. The main table has columns for NAME, OWNER, PIPELINE, PIPELINE STAGE, and STATUS. The 'Advanced filters' button is highlighted with a red box.

| NAME | OWNER | PIPELINE | PIPELINE STAGE | STATUS |
|---|-----------------------------|--------------------------------|--------------------------------|--------|
| On-Boarding - The Little Campus (A) - PPC | BR Briana Reichert (bria... | Paid Media Operations - On... | Intake (Paid Media Opera... | -- |
| Optimizations - A Posh Production, Inc (A) - PPC | BR Briana Reichert (bria... | Paid Media Operations - Opt... | Monthly Optimization (Paid ... | -- |
| Optimizations - Solutions Group Accounting Firm (A) - ... | BR Briana Reichert (bria... | Paid Media Operations - Opt... | Monthly Optimization (Paid ... | -- |
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| Optimizations - NYC Beauty Supply Inc. (A) - PPC | BR Briana Reichert (bria... | Paid Media Operations - Opt... | Monthly Optimization (Paid ... | -- |
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| Optimizations - SES, LLC, DBA Northwest Tenant Group... | BR Briana Reichert (bria... | Paid Media Operations - Opt... | Monthly Optimization (Paid ... | -- |
| Optimizations - McWane Poles (A) - PPC | BR Briana Reichert (bria... | Paid Media Operations - Opt... | Monthly Optimization (Paid ... | -- |

STEP 6

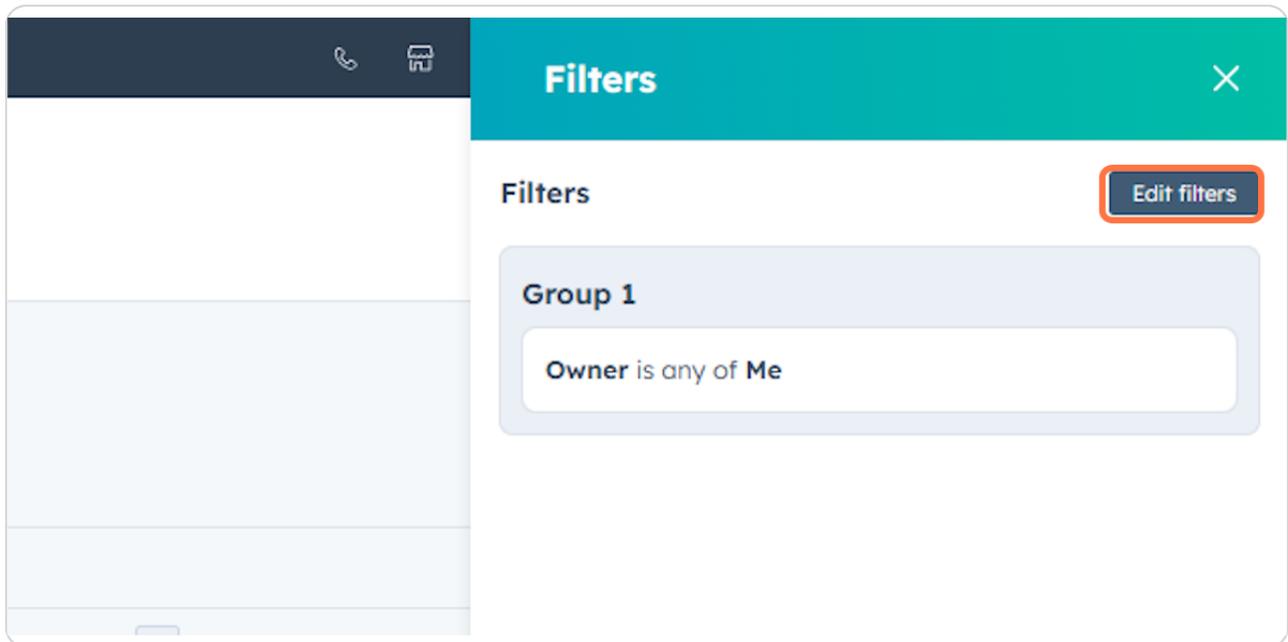
You can further filter the report by applying "Advanced Filters"

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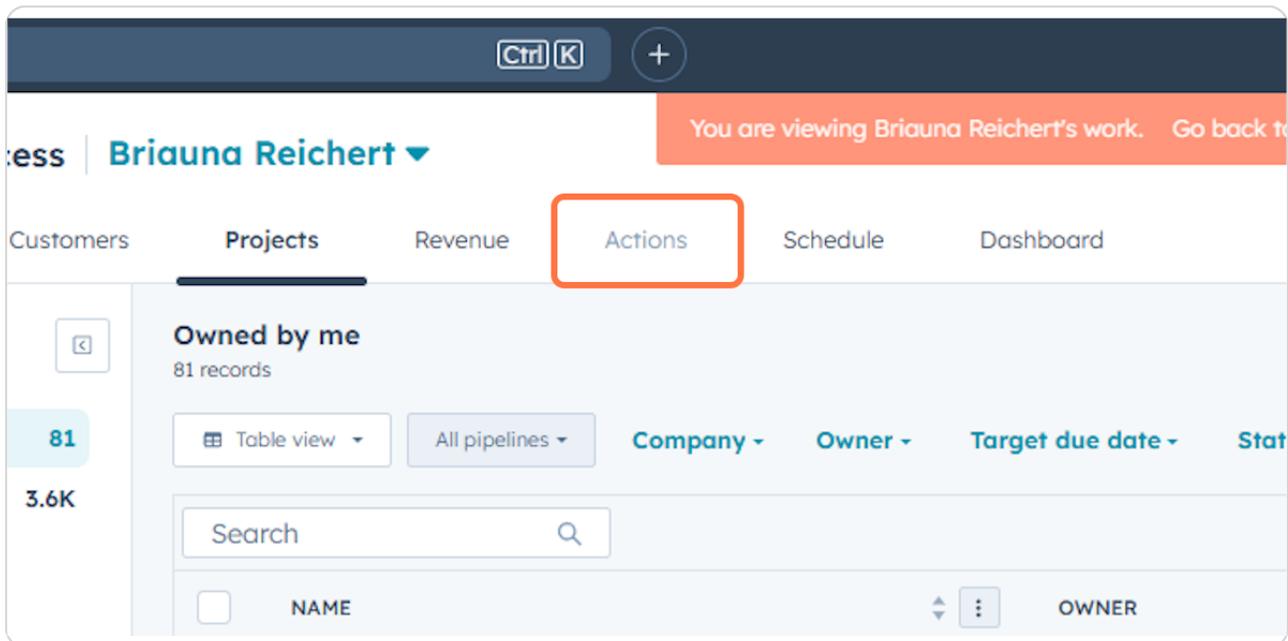
STEP 7

Click on Edit filters to add new criteria



STEP 8

Navigate to the Actions tab



STEP 9

Here you can see index views of tasks assigned to you with various due date horizons.

The screenshot shows a task management interface with a navigation bar at the top containing 'Summary', 'Customers', 'Projects', 'Revenue', 'Actions', 'Schedule', and 'Dashboard'. On the left, there is an 'Actions' menu with 'Alerts' and 'Tasks' options. Below this, a list of task views is shown: 'All my open tasks' (84), 'Due today' (1), 'Overdue' (82), 'Due tomorrow' (1), 'Due this week' (3), 'Due next week' (0), and 'All completed' (7). The 'Due this week' view is selected and highlighted. The main content area displays a table of 3 records for tasks due this week. The table has columns for 'TASK TITLE', 'ASSIGNED TO', 'TASK -- COMPANIES', 'PRIORITY', and 'TASK TY'. The tasks listed are: 'PPC Optimization for Matsu... - PPC' (assigned to Briouna Reichert), 'PPC Optimization for Tokyomod... - PPC' (assigned to Briouna Reichert), and 'PPC Optimization for Invest Cast Inc. (A) - PPC' (assigned to Briouna Reichert). All tasks have a 'Low' priority and are marked as 'To-do'.

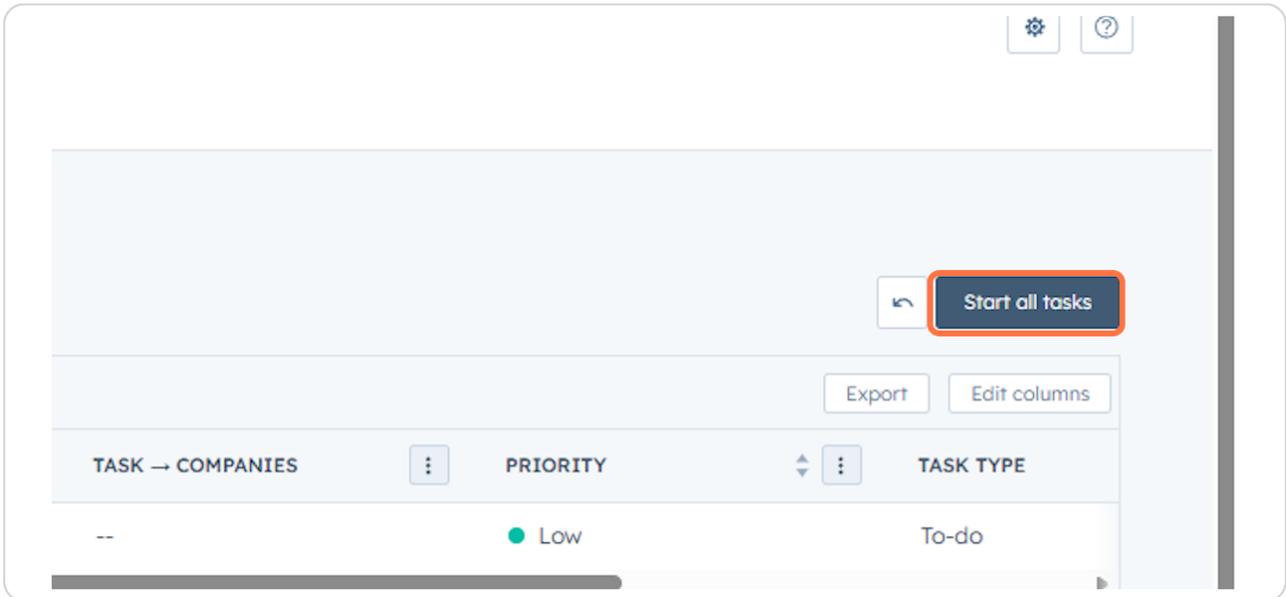
STEP 10

Toggle between pre-filtered views using the actions menu on the left-side of the page.

This screenshot shows the same task management interface as in Step 9, but with the 'Actions' menu on the left side expanded. The menu items are: 'Marketing', 'Content', 'Sales', 'Commerce', 'Service' (highlighted), 'Data Management', 'Automation', 'Reporting', 'Breeze', and 'Development'. The 'Due this week' view is still selected in the task list, and the table of tasks is visible on the right side of the interface.

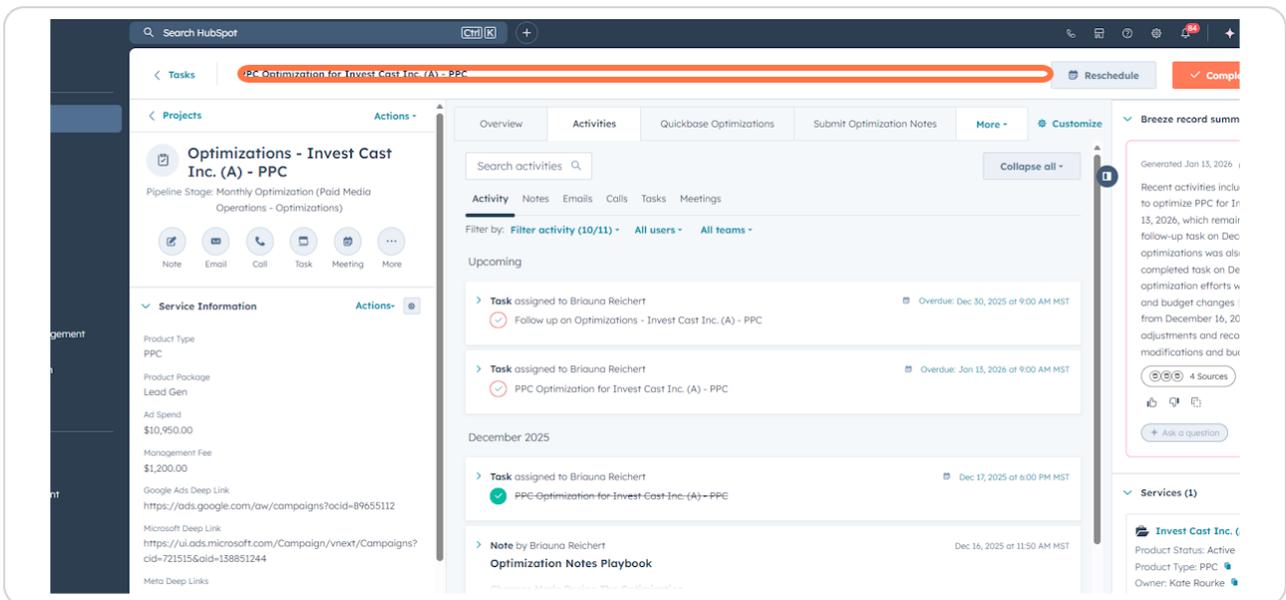
STEP 11

From any of the views, you can hit "Start All Tasks" which will prompt a workflow that guides you through each task in the list you're viewing.



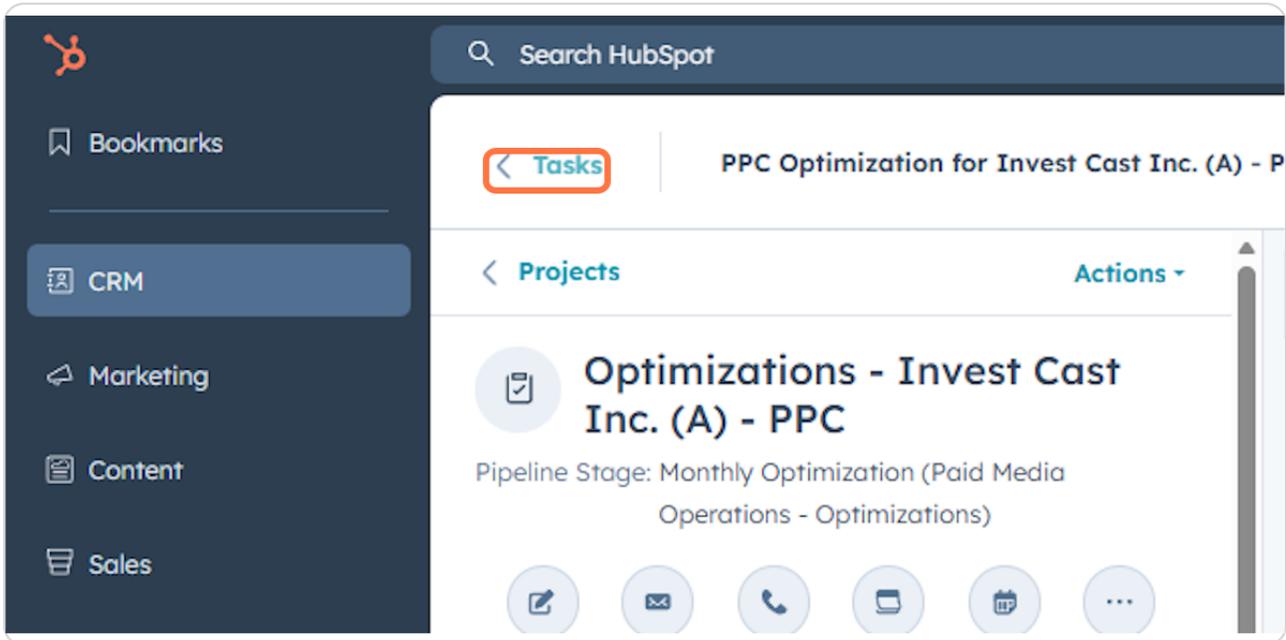
STEP 12

You'll be brought to the Project relevant to the task. Complete the task externally and then mark the "Complete" button at the top of the page. This will automatically move you to the next task in the workflow.



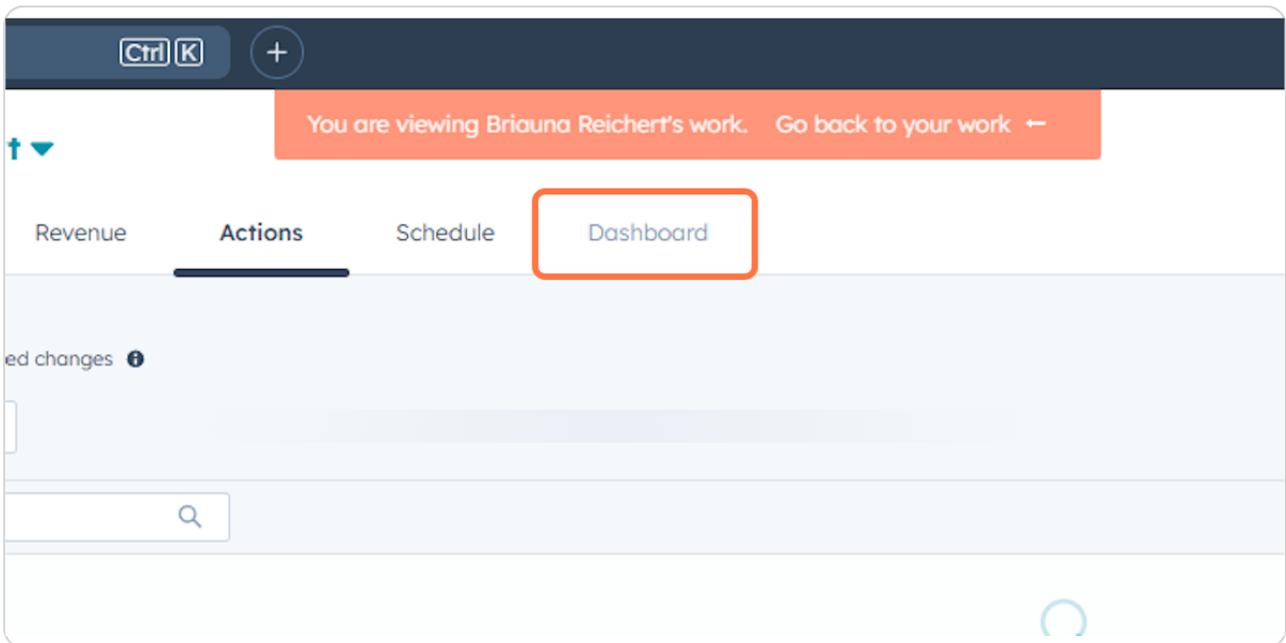
STEP 13

Click on Tasks to get back to your Customer Success workspace



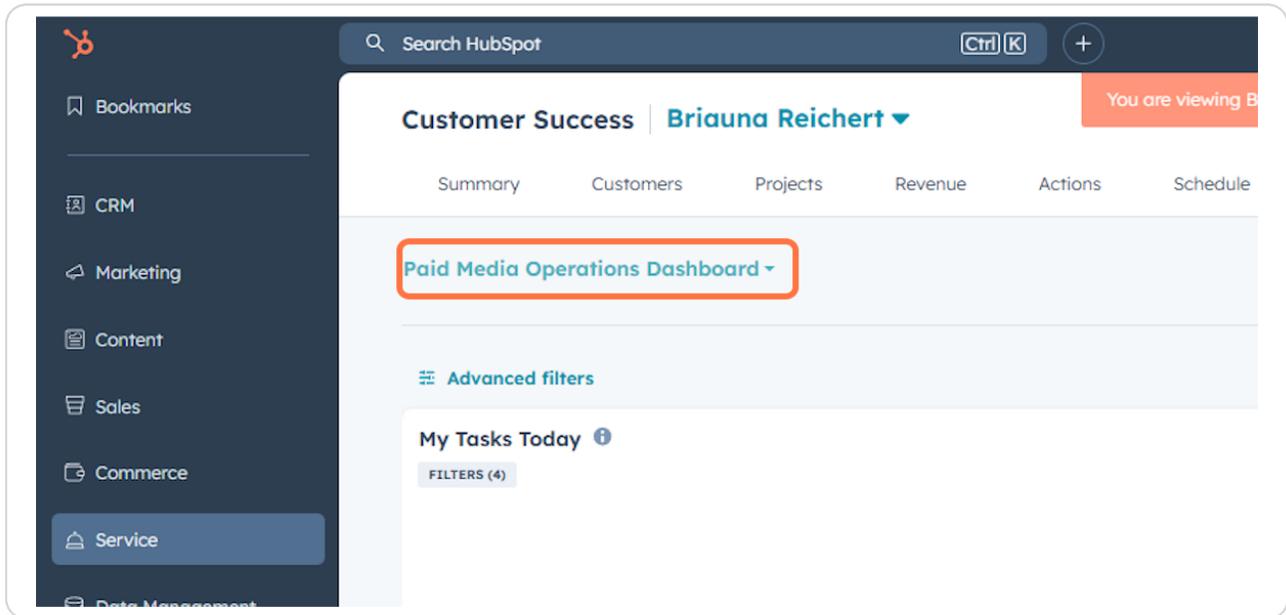
STEP 14

Navigate to the Dashboard tab



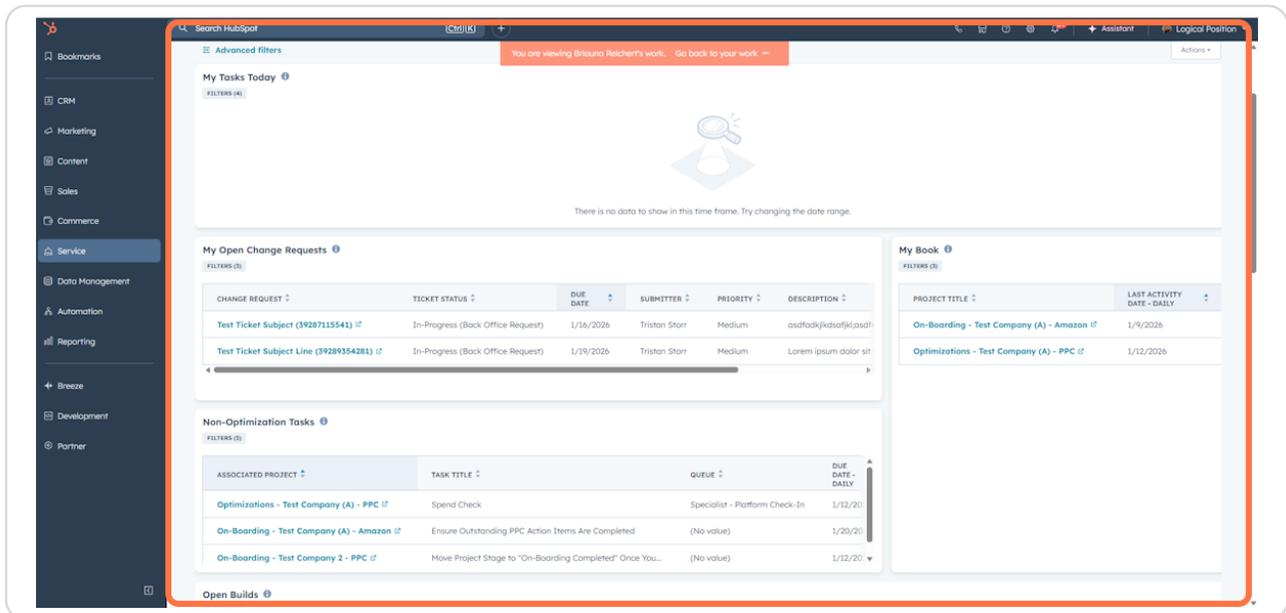
STEP 15

The dashboard tab should be pre-loaded with the Paid Media Operations Dashboard.



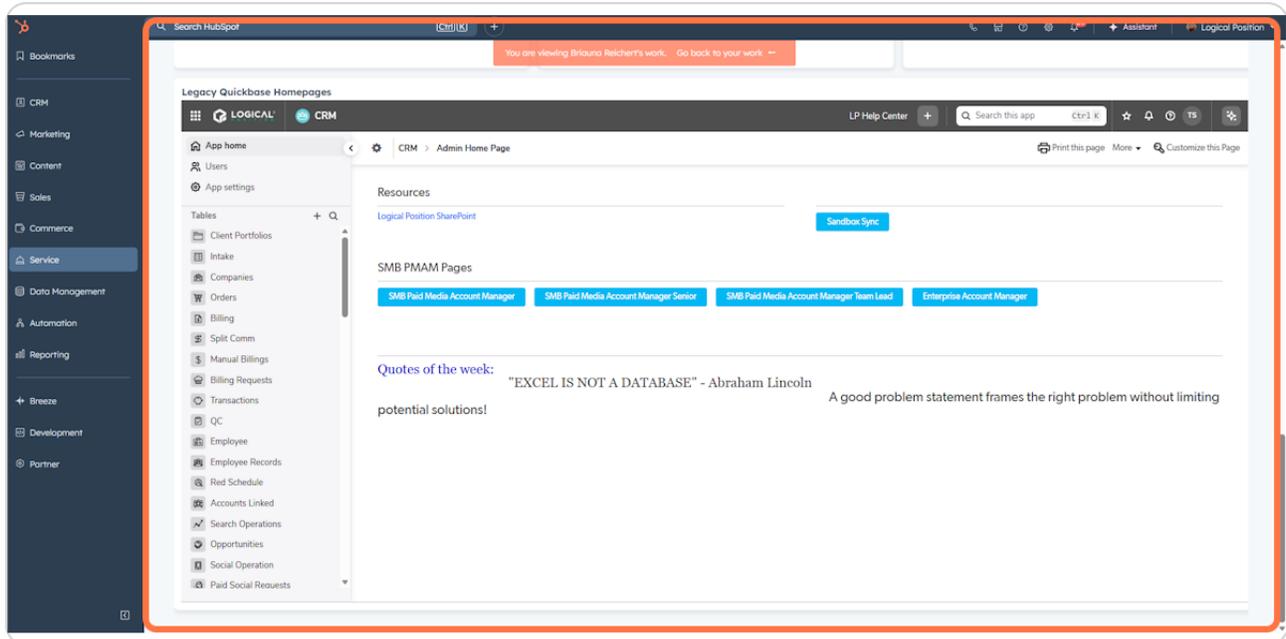
STEP 16

Here, you will find customer, LP-specific reporting that will categorize your tasks, tickets, and projects in-line with views you previously had in Quickbase.



STEP 17

At the bottom of the dashboard, you will have an embedded view of your legacy Quickbase homepage. From here you can access any legacy data you need to quickly navigate to.



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