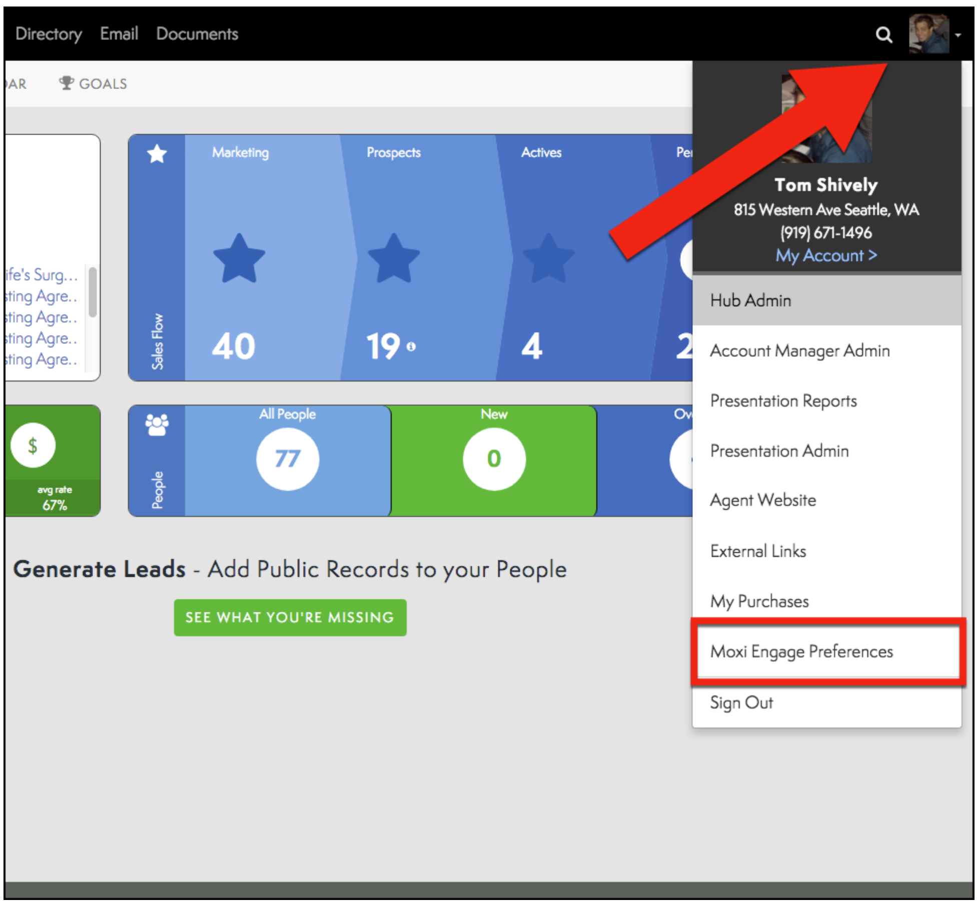
Task Manager Overview

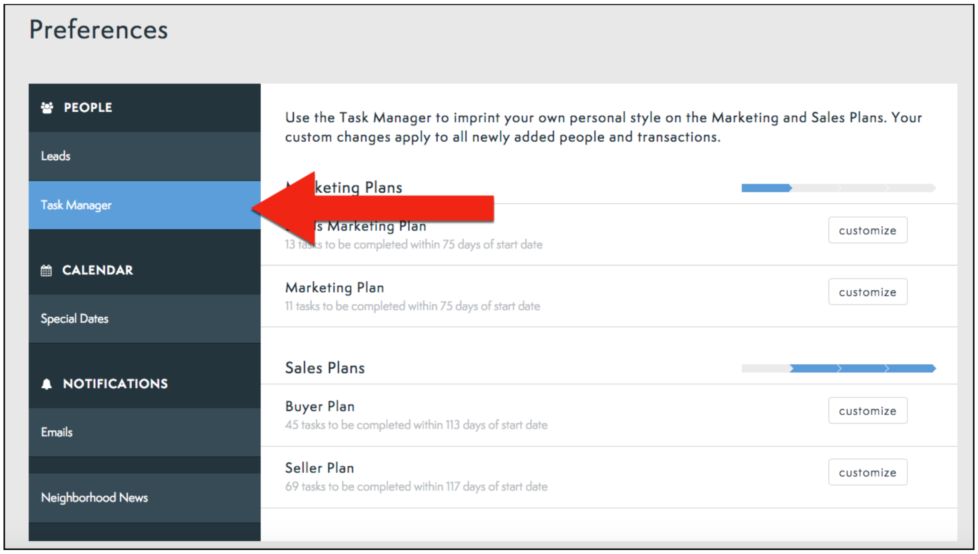
Create your own custom task list in your sales flow! The task list in your sales flow by default is created by your brokerage. While this list is carefully curated, you may want to add or remove tasks to better fit your sales process. You can now create your own task lists for each section of your sales flow!

Uber Task Manager Overview

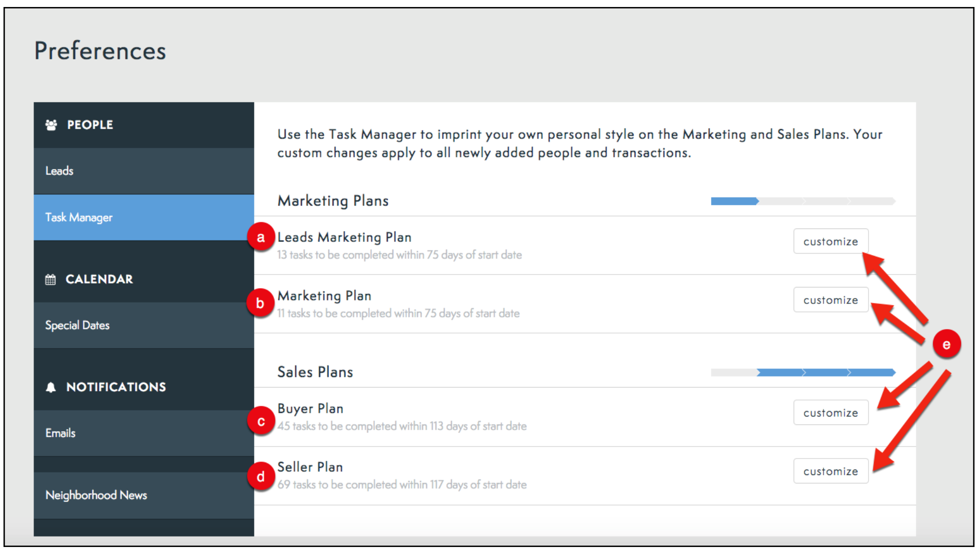
1. From the agent drop down menu, select **Moxi Engage Preferences** (See below).



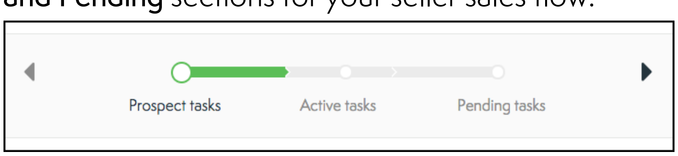
2. Select **Task Manager** (See below).



3. Task Manager Overview:



a. Lead Marketing Plan – This will create a task list for the leads that come into Engage from either the Neighborhood News sign-up sheet or one of our Lead routing partners!
b. Marketing Plan –This task list will be for the people in your marketing flow that originate from your sphere of influence. These contacts can come from your email or people you put directly into Engage.
c. Buyer Plan –Here you can create task lists for buyer transactions! You will be able to make separate lists for the **Prospects, Active, and Pending** sections of the sales flow.
d. Seller Plan – You guessed it, the seller list! You can create separate lists for the **Prospects, Active, and Pending** sections for your seller sales flow.



e. Customize – This button will bring you to the task list for each one of the sections in the sales flow.