## 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

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

2. Select Task Manager (See below).

Preferences			
PEOPLE	Use the Task Manager to imprint your own personal style on the Marketing and Sales Plans. Your		
Leads	custom changes apply to all newly added people and transactions.		
Leaus			
Task Manager	keting Plans		
	s Marketing Plan	customize	
	13 fasks to be completed within 75 days of start date		
	Marketing Plan	customize	
Special Dates	11 tasks to be completed within 75 days of start date		
	Sales Plans	$\rightarrow$ $\rightarrow$ $\rightarrow$	
	Buyer Plan	customize	
Emails	45 tasks to be completed within 113 days of start date		
	Seller Plan	customize	
Neighborhood News	69 tasks to be completed within 117 days of start date	Customize	
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3. Task Manager Overview:

Preferences			
答 PEOPLE	Use the Task Manager to imprint your own personal style on the Marketing and Sales Plans. Your		
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Task Manager	Marketing Plans		
	a Leads Marketing Plan 13 tasks to be completed within 75 days of start date	customize	
🛗 CALENDAR	Marketing Plan	customize	
Special Dates	11 tasks to be completed within 75 days of start date		
	Sales Plans	$\rightarrow$	
	Buyer Plan 45 tasks to be completed within 113 days of start date	customize	
Emails	40 libra lo de completed winnin ho days of stan date		
Neighborhood News	Seller Plan 69 tasks to be completed within 117 days of start date	customize	
Neighborhood News	69 tasks to be completed within 117 days of start date		

- 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!
- 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.