Task Manager Edit

Once you have created a task list or if this is the first time using the task manager you may want to edit one of your task lists. Follow the directions below to edit a task list!

Task Manager Edit

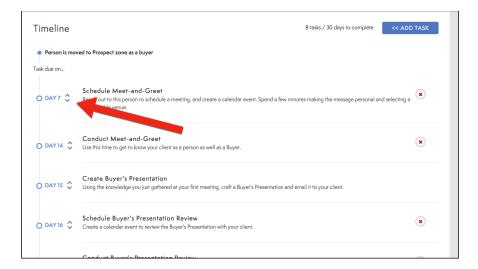
- 1. From the preferences menu find the task list you would like to edit.
- 2. Select the **Customize** button (see below).

Second	Use the Task Manager to imprint your own personal style on the Marketing and Sales Plans. Your custom changes apply to all newly added people and transactions.					
Leads	custom changes apply to an newly acces people and transactions.					
Task Manager	Marketing Plans					
	Leads Marketing Plan	customize				
	13 tasks to be completed within 75 days of start date					
	Marketing Plan - custom 13 tasks to be completed within 75 days of start date	customize ***				
Special Dates						
	Sales Plans	\rightarrow \rightarrow \rightarrow				
	Buyer Plan	customize				
Emails	45 tasks to be completed within 113 days of start date					
	Seller Plan - custom	customize ***				

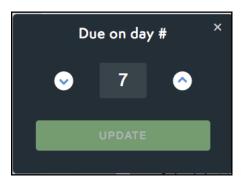
- 3. Select which part of the plan you would like to edit.
 - a. NOTE: This only applies to Buyer or Seller Plans.

Buyer Plan					SAVE	CANCEL
	4	Prospect tasks	Active tasks	Pending tasks	Þ	
Timeline				8 tasks /	30 days to complete	<< ADD TASK
Person is moved to Person is	rospect zone as a buye	r				

- 4. Select which task you would like to edit.
 - a. NOTE: The due dates begin counting the moment you move your person to each section of the sales flow. (I.e. when I move Jillian to the Prospects part of the sales flow, the task "Schedule a meet and greet" will be due 7 days later).
- 5. Select the arrow next to the date.



6. Select the amount of days you would like to this task to take.



7. You can also delete a task by using the red **"X"** on the right of the tasks.

