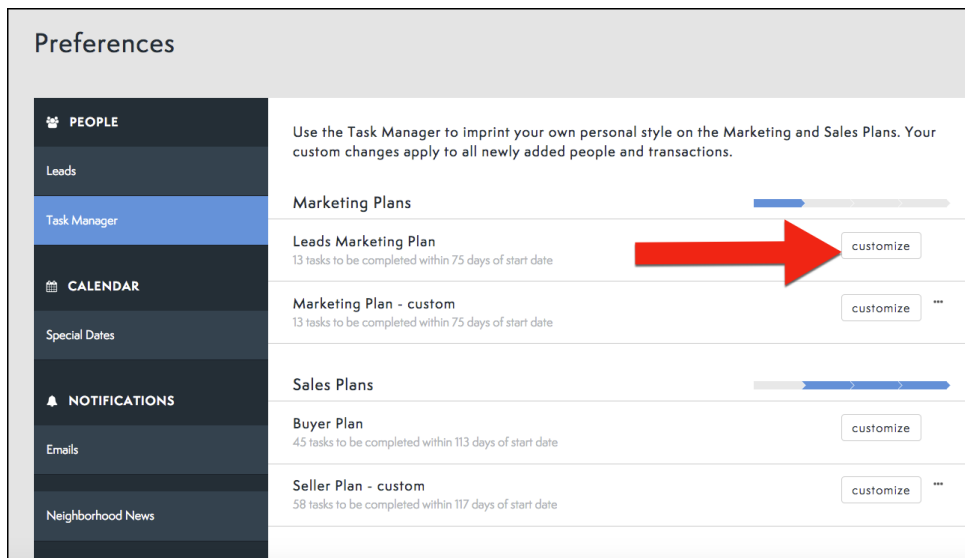


Task Manager: Add a New Task

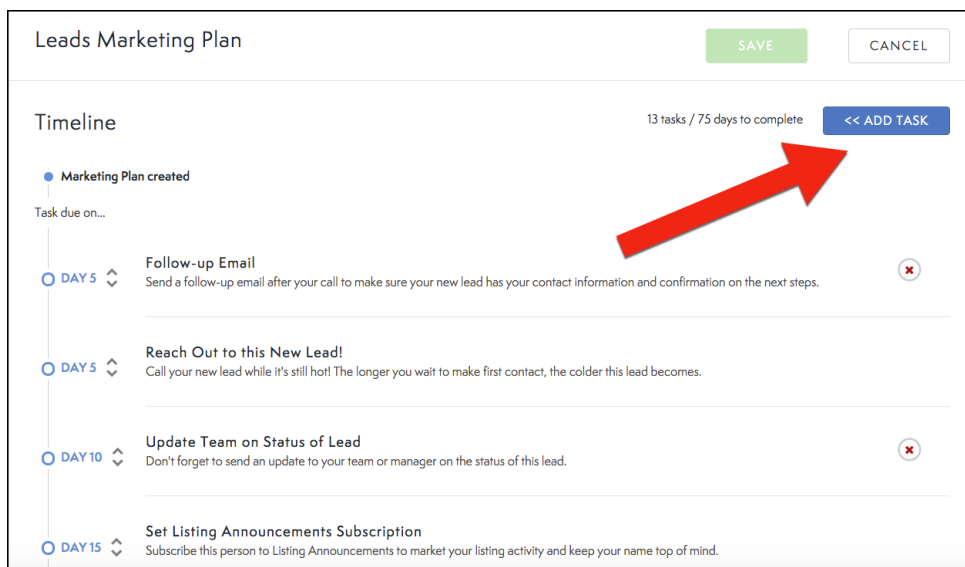
If there is something you like to do for each of your clients, but this action is not on your task list, you can now create your own tasks! Create your own tasks in the Task Manager admin!

Create a New Task

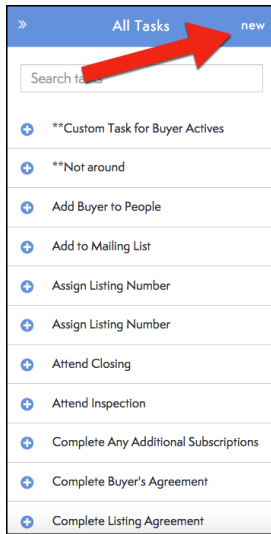
1. From your Task List admin, select the list you would like to add a task to (see below).



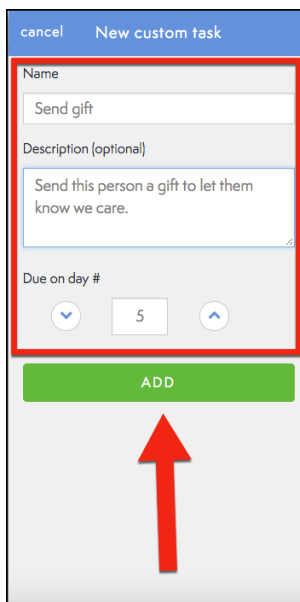
2. Select **New Task** (See below).



3. Select **New**, to create a new task.



4. Fill out details of new task including **Name**, **Description**, and **Due Date**, and select **Add**.



Add a New Task From the Stock Task List

1. Select Add Task (See below).

Leads Marketing Plan

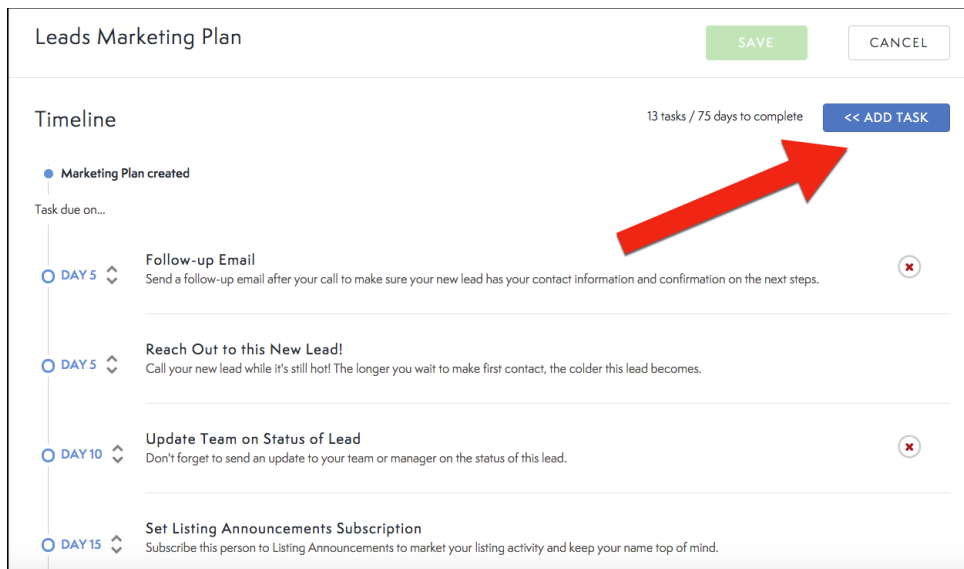
SAVE CANCEL

Timeline 13 tasks / 75 days to complete << ADD TASK

Marketing Plan created

Task due on...

- DAY 5 Follow-up Email
Send a follow-up email after your call to make sure your new lead has your contact information and confirmation on the next steps.
- DAY 5 Reach Out to this New Lead!
Call your new lead while it's still hot! The longer you wait to make first contact, the colder this lead becomes.
- DAY 10 Update Team on Status of Lead
Don't forget to send an update to your team or manager on the status of this lead.
- DAY 15 Set Listing Announcements Subscription
Subscribe this person to Listing Announcements to market your listing activity and keep your name top of mind.



2. Select the Task from the Stock Task list.

- a. NOTE – You can search for tasks using the search bar. You can also, see the details of the task by clicking on it.

All Tasks new

Search tasks

- + !Set Neighborhood News Subscription
- + ****Custom Task for Buyer Actives**

Los todos

Only for MLS transactions close

- + ****Not around**
- + Add Buyer to People
- + Add to Mailing List
- + Assign Listing Number
- + Assign Listing Number

