

# Working with Sales Flow Tasks

Each Sales Flow zone includes a set of tasks. These tasks differ from zone to zone and from Buyer to Seller. Mark tasks as complete, create new tasks, schedule tasks to complete at a later date, and assign tasks to be completed by another person.

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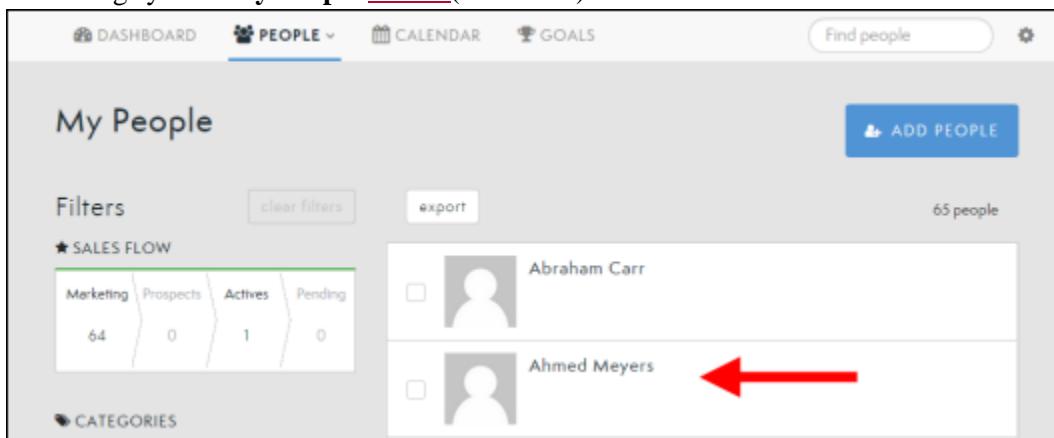
## Completing a Task

To complete a task follow the steps below:

1. Sign into Moxi Works™ / Moxi Engage™.
2. Click on **All People** in the **People** section (see below).



3. This brings you to **My People** [screen](#) (see below).



4. Select the person whose tasks you would like to complete. In this example, client **Ahmed Meyers** is selected (see above, indicated by the red arrow).
5. This opens your client's profile card and task list (see below).

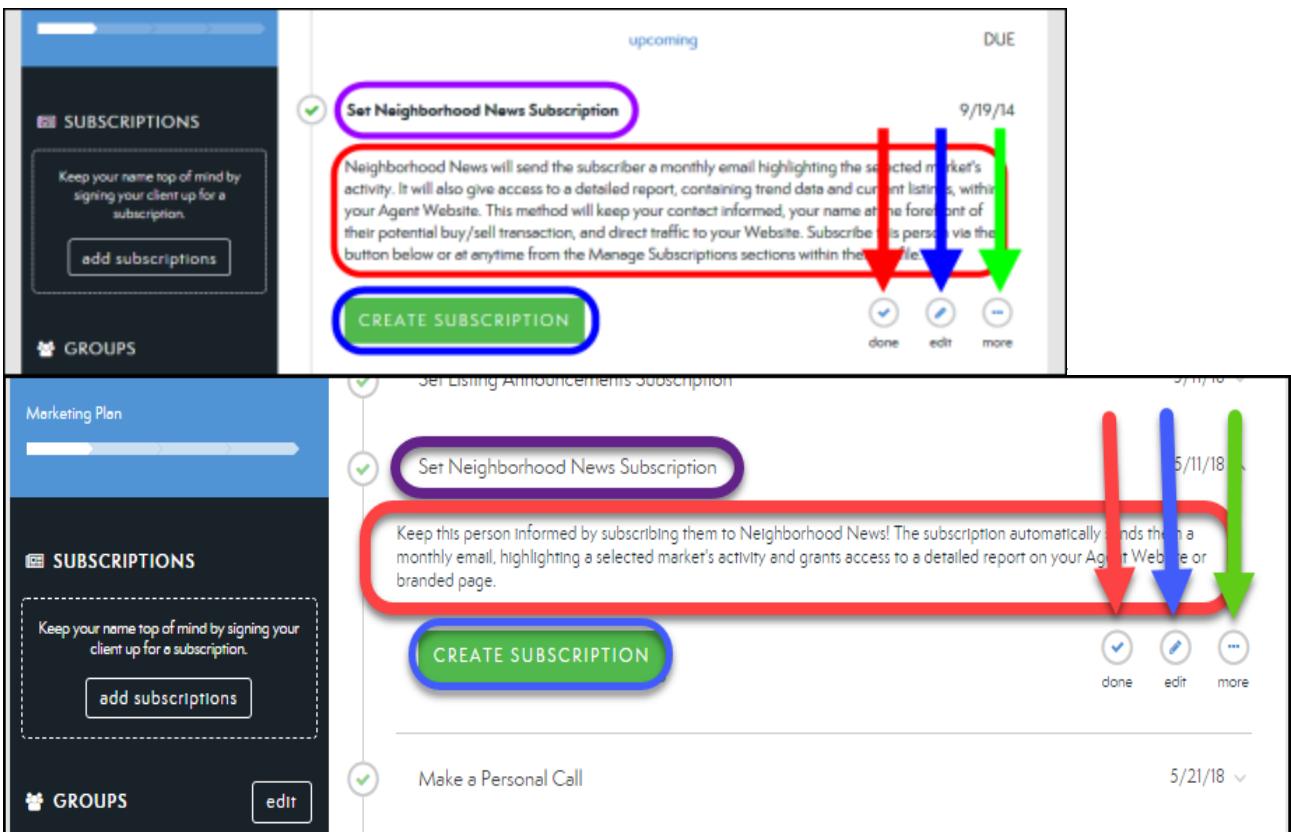
The screenshot shows the 'PEOPLE' tab selected in the top navigation bar. A profile card for 'AHMED MEYERS' is displayed on the left, featuring a placeholder image, a blue progress bar labeled 'Marketing Plan' at approximately 80%, and a 'SUBSCRIPTIONS' section with a note to sign up for a subscription. To the right, a 'Marketing Plan' section is shown with a green button 'MAKE THIS PERSON A PROSPECT'. Below it, a 'TASKS' tab is selected, showing a list of 9 tasks remaining. The tasks are categorized by status: 'upcoming' (Set Neighborhood News Subscription, Make a Personal Call), 'DUE' (Set Neighborhood News Subscription, Make a Personal Call), and 'this week' (Set Neighborhood News Subscription). Each task has a green checkmark icon to its left.

6. To quickly complete a task, click on the check mark to the left of the task name (see below, circled in red).

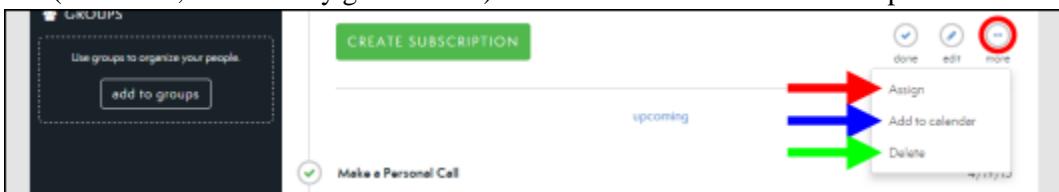
The image contains two screenshots of the task list. The top screenshot shows a subset of tasks from the previous screenshot, all of which have been completed, as indicated by the red circles around the green checkmark icons. The bottom screenshot shows a larger list of tasks, also with red circles around the checkmarks, indicating they have been completed. Both screenshots include a 'NOTES' section with a note to sign up for a subscription and a 'GROUPS' section.

Task	Due Date
Set Neighborhood News Subscription	4/9/15
Make a Personal Call	4/19/15
Schedule a Meeting	4/24/15
Post on Social Media	5/4/15
Send Concierge Invite	5/9/18
Set Listing Announcements Subscription	5/9/18
Set Neighborhood News Subscription	5/9/18
Make a Personal Call	5/19/18
Schedule a Meeting	5/24/18
Post on Social Media	6/3/18
Complete Any Additional Subscriptions	6/13/18

7. To review more information about a task, click on the task title (see below, circled in purple).



8. In the above Task example **Set Neighborhood News Subscription**, I can do the following:
- DESCRIPTION:** View details for this task (see above, circled in red).
  - CREATE SUBSCRIPTION:** Clicking this button will open the Subscription screen allowing you to create the subscription for your person (see above, circled in blue).
  - DONE:** Click here to mark a task as complete (see above, indicated by red arrow).
    - NOTE:** This will move your task and will be visible at the bottom of your task list under the **Completed** section.
  - EDIT:** Click here to edit the due date (see above, indicated by blue arrow).
  - MORE:** Find additional options, including assign to another person, add it to your calendar, and delete (see above, indicated by green arrow). See below to learn about these options.



- ASSIGN:** Send an email to another person in your contact list to request they complete this task (see above, indicated by red arrow).
- ADD TO CALENDAR:** This task will be added to your calendar (see above, indicated by blue arrow).
- DELETE:** Remove this task from your list (see above, indicated by green arrow).
  - NOTE:** Any deleted tasks will be visible at the bottom of your task list under the **Delete** section and can be recovered at any time.



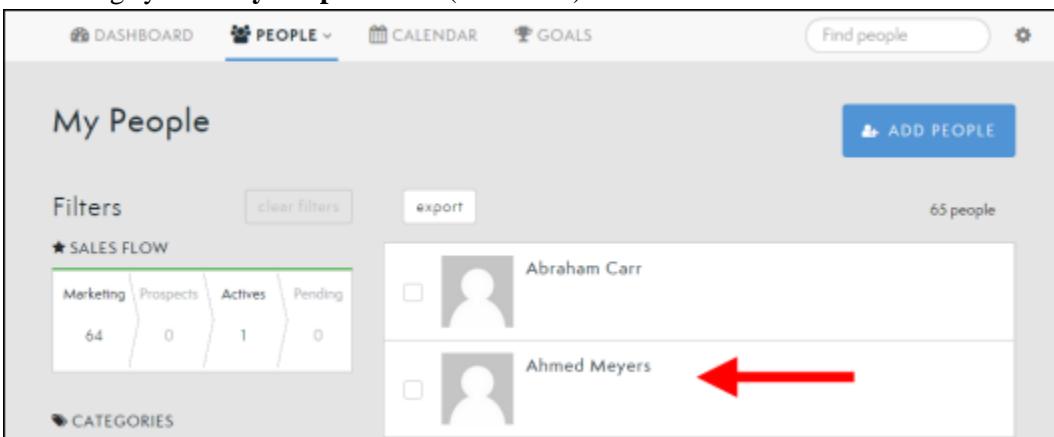
## Creating a Task

You may need to Create additional Tasks unique to your Transaction. To create a task, follow the steps below:

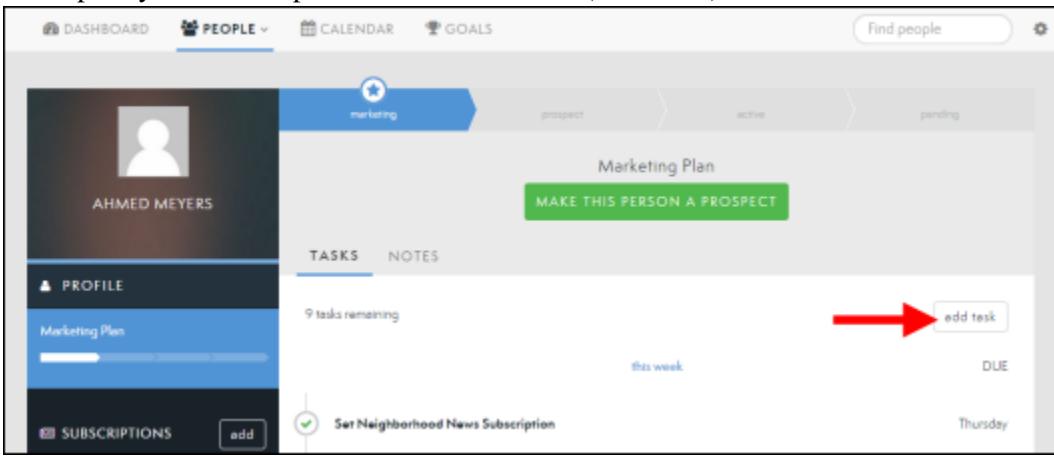
1. Sign into Moxi Works/Moxi Engage.
2. Click on All People in the People section (see below).



3. This brings you to My People screen (see below).



4. Select the person whose tasks you would like to complete. In this example, client **Ahmed Meyers** is selected (see above, indicated by the red arrow).
5. This opens your client's profile card and task list (see below).



6. Click **Add Task** (see above, indicated by red arrow).
7. Add task information (see below).

The image consists of two side-by-side screenshots of a software application interface.

**Top Screenshot (Task Creation):**

- Left Panel:** Shows a sidebar with "Marketing Plan" (progress bar), "SUBSCRIPTIONS" (with "Neighborhood News [1]"), and "GROUPS".
- Right Panel:** Titled "TASKS" and "NOTES". It shows "9 tasks remaining". A red circle highlights the "Task name" input field. A blue circle highlights the "Description" input field. A green circle highlights the "Duration" input field (set to 15 minutes). A purple circle highlights the "Due date" input field (set to 5/11/18). A red arrow points to the "DONE" button.

**Bottom Screenshot (Subscription Management):**

- Left Panel:** Shows a sidebar with "Marketing Plan" (progress bar), "SUBSCRIPTIONS" (with a note to "Keep your name top of mind by signing your client up for a subscription." and a "add subscriptions" button), and "GROUPS".
- Right Panel:** Shows a list of tasks:
  - "Set Neighborhood News Subscription" (status: "done", indicated by a green checkmark icon)
  - "Keep this person informed by subscribing them to Neighborhood News! The subscription automatically sends them a monthly email, highlighting a selected market's activity and grants access to a detailed report on your Agent Website or branded page." (description text)
  - "CREATE SUBSCRIPTION" (button)
  - "Make a Personal Call" (status: "in progress", indicated by a yellow circle icon)A red circle highlights the "Keep this person informed..." text. Three arrows point to the "done" status of the first task: a red arrow from the "done" status, a blue arrow from the "5/11/18" due date, and a green arrow from the green checkmark icon.

- Task Name:** Give your new task a title (see above, circled in red).
- Description:** Give your task a description (see above, circled in blue).
- Duration:** Choose the length of time this task should take (see above, circled in green).
- Due date:** Provide a due date for your task (see above, circled in purple).
- Click Done** (see above, indicated by red arrow).