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.

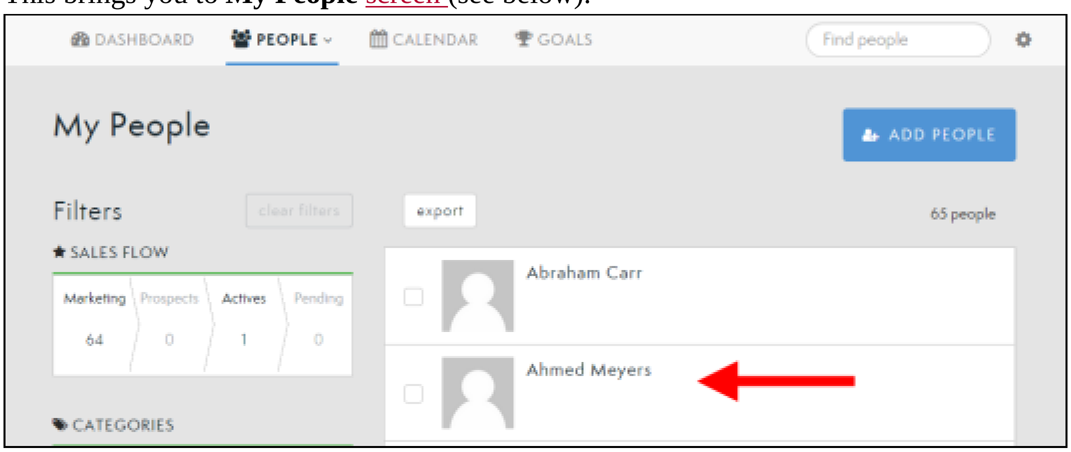
Contents

Completing a Task

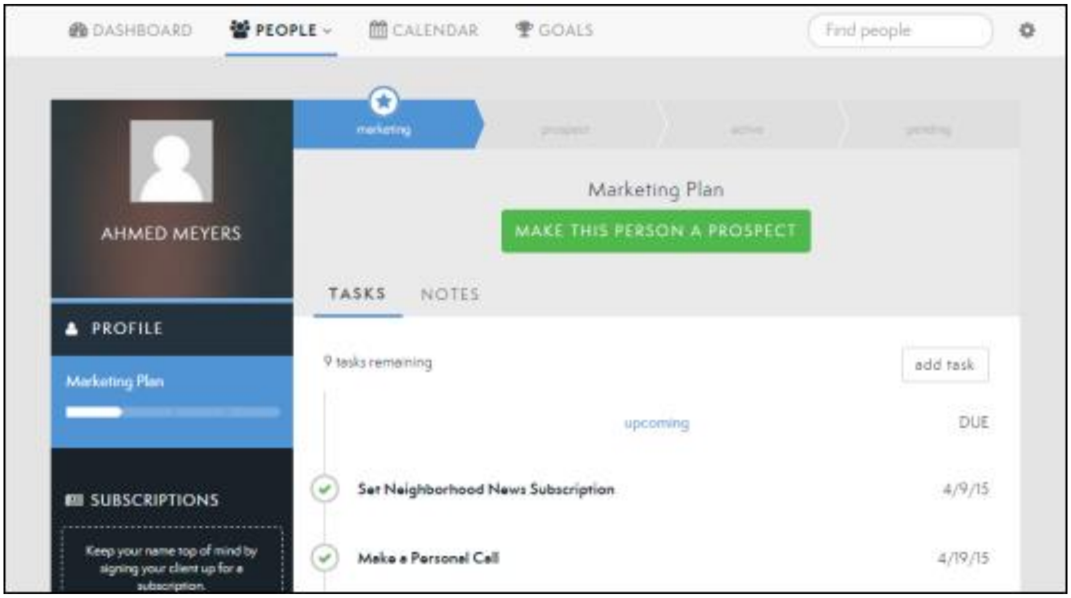
To complete a task follow the steps below:

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

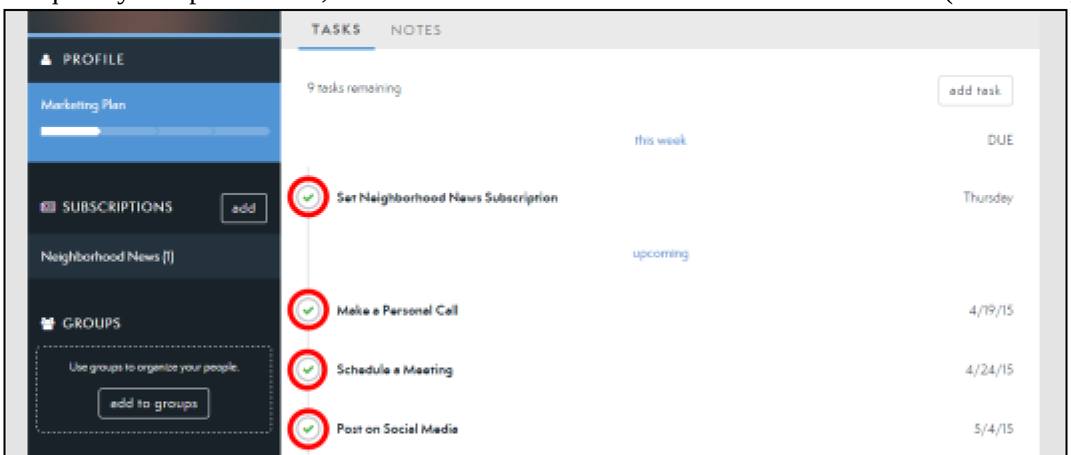
3. This brings you to **My People** screen (see below).

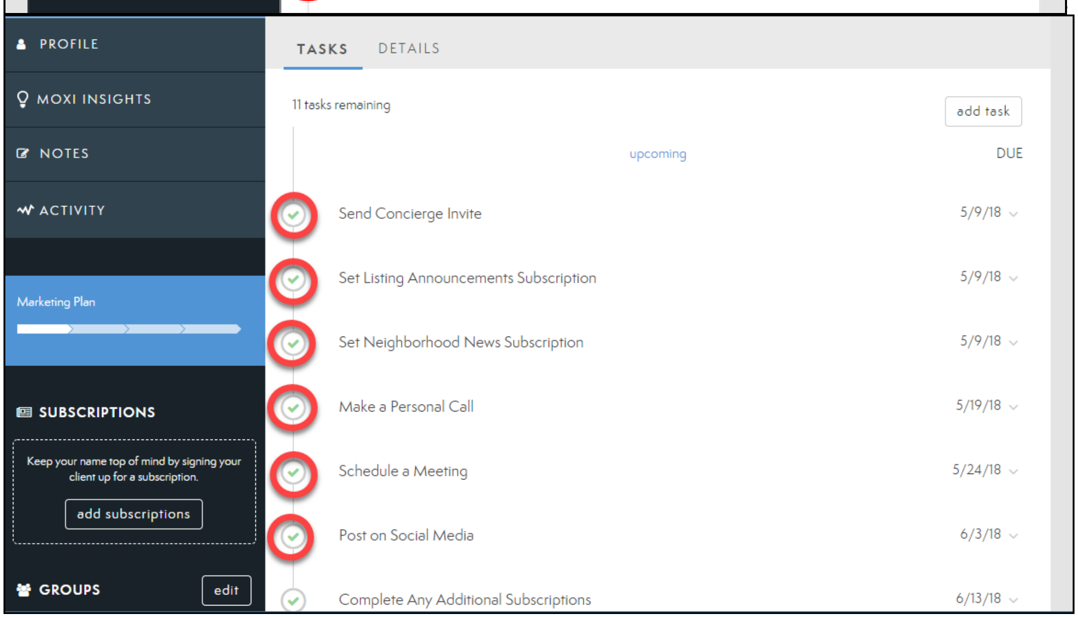


4. Select the person whose tasks you would like to complete. In this example, client **Ahmed Meyers** is selected (see above, indicated by the red arrow).
5. This opens your client's profile card and task list (see below).

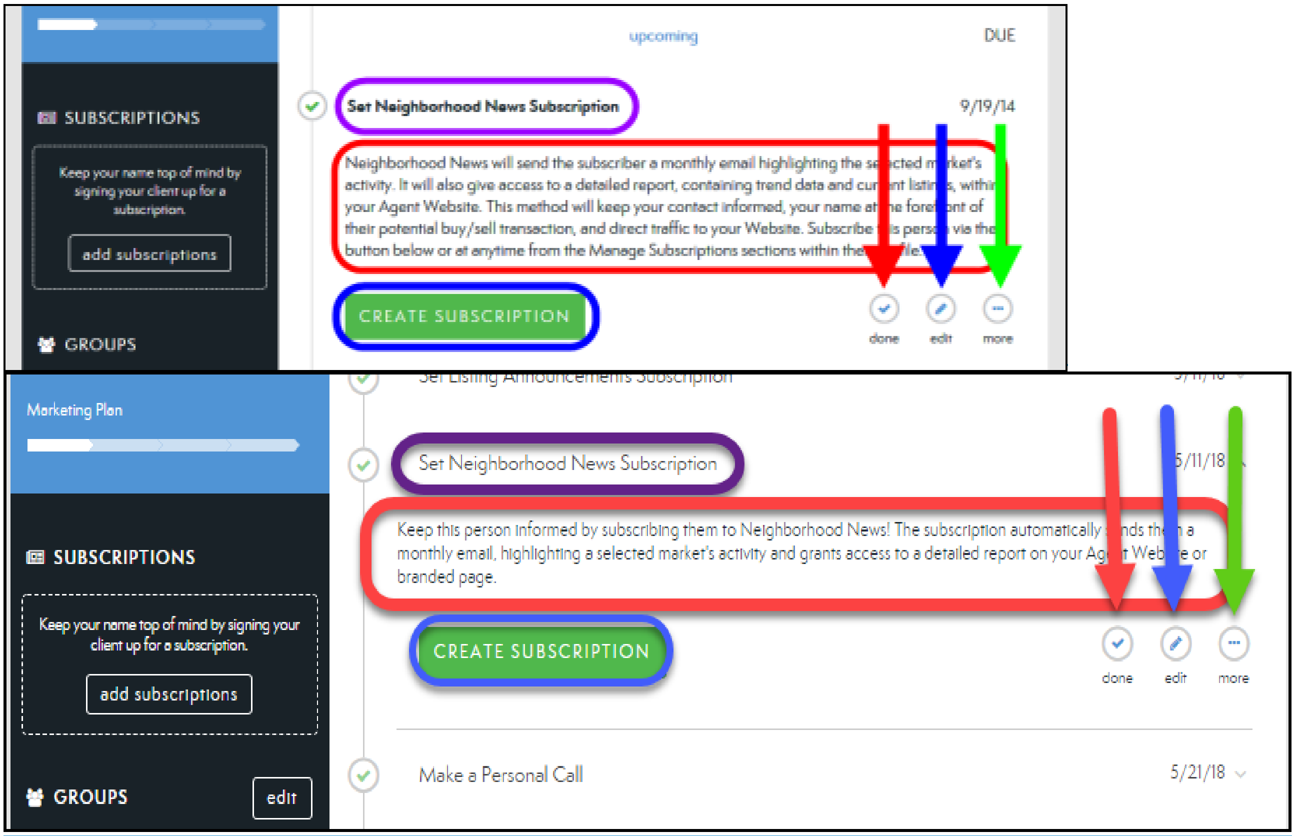


6. To quickly complete a task, click on the check mark to the left of the task name (see below, circled in red).





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



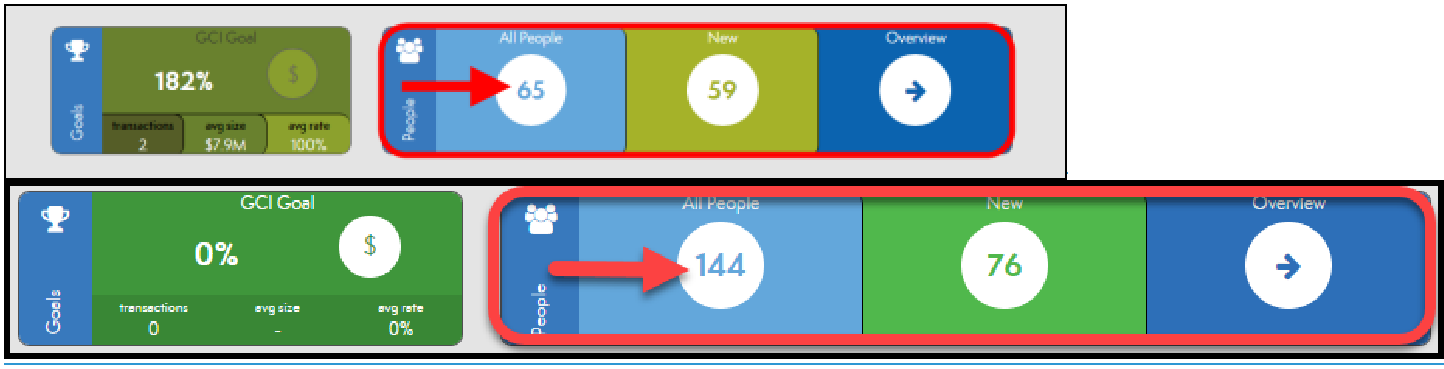
8. In the above Task example **Set Neighborhood News Subscription**, I can do the following:
   a. **DESCRIPTION:** View details for this task (see above, circled in red).
   b. **CREATE SUBSCRIPTION:** Clicking this button will open the Subscription screen allowing you to create the subscription for your person (see above, circled in blue).
      - **NOTE:** Some tasks will vary and may not have this button. Clicking on the Green Action button whether named something else or not will take you to that specific area within Moxi Works/Moxi Engage.
   c. **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.
   d. **EDIT:** Click here to edit the due date (see above, indicated by blue arrow).
   e. **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.

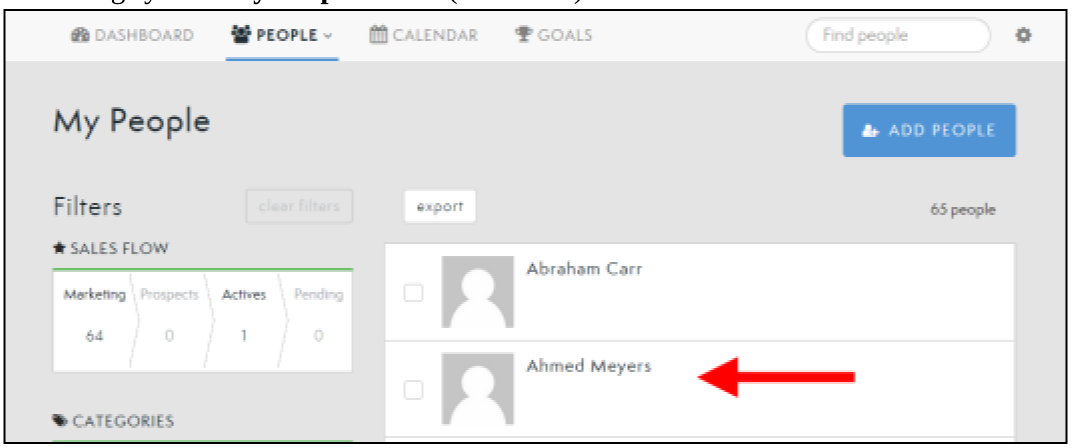
Creating a Task

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

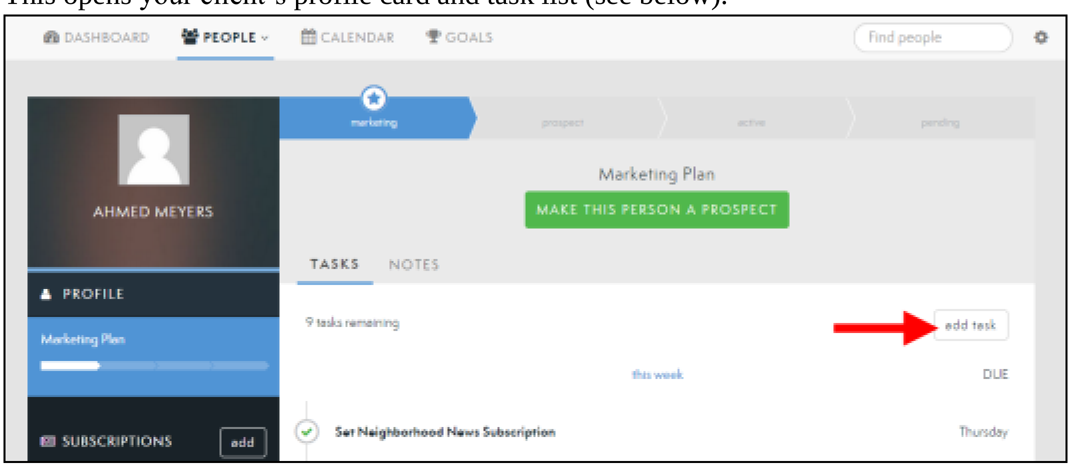
1. Sign into Moxi Works/Moxi Engage.
2. Click on **All People** in the **People** section (see below).



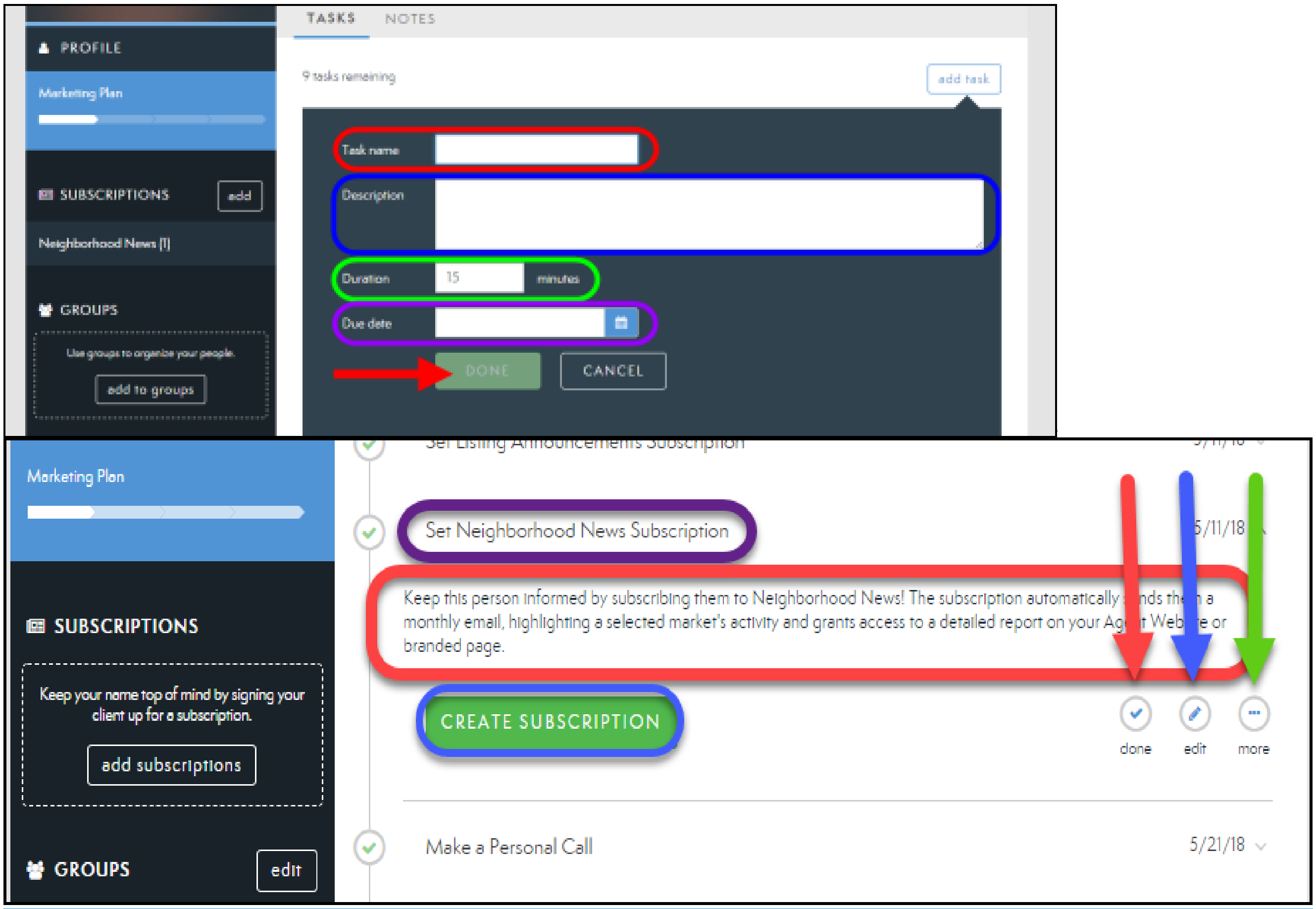
3. This brings you to **My People** screen (see below).



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).



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