Your Tasks List

Your Tasks List is your go-to space for staying on top of overdue and upcoming tasks.

Introduction

Your Tasks List on the Tasks Page is your dynamic calendar across all transactions. It provides a clear and organized view of your overdue and upcoming tasks, guiding you on what needs your attention each day.

It's your main space for managing tasks that need to get done on transactions, keeping you on track and helping you meet deadlines by showing you what's most important.

From this list, you can view and manage your tasks, making it easy to stay organized and prioritize your work.

You can sort and find tasks, save shortcuts, and sync with your calendar app to stay organized and on top of things.

How It Works

Your View

- **Your Tasks**: Provides a personalized view of your tasks.
- **Your Calendar**: Helps quickly identify critical tasks and plan your day accordingly.
- Uses color-coded due dates to indicate overdue (red), due today (orange), due tomorrow (yellow), and future tasks (gray).

Dynamic Prioritization

- **Color-Coded Due Dates**: Uses color-coded due dates to indicate overdue (red), due today (orange), due tomorrow (yellow), and future tasks (gray).
- **Dynamic Updates**: Reflects updates and changes made to tasks across all transactions.

Flexible Tool

- **Sorting and Filtering**: Allows sorting, searching, and filtering of tasks for tailored views.
- **Custom Views**: Supports saving custom views for quick access to frequently used tasks.
- **Calendar Syncing**: Syncs with Google Calendar, iCal, or Outlook for seamless integration with your daily schedule.
- **Versatility**: Offers versatility to manage your workload efficiently, whether you need a high-level overview or detailed task breakdown.

Access & View Your Tasks List

Access and view your Tasks List on the Tasks List Page to track and manage your overdue and upcoming tasks across all transactions.

Who Can Do This: Anyone can access their overdue and upcoming tasks on the Tasks List Page.

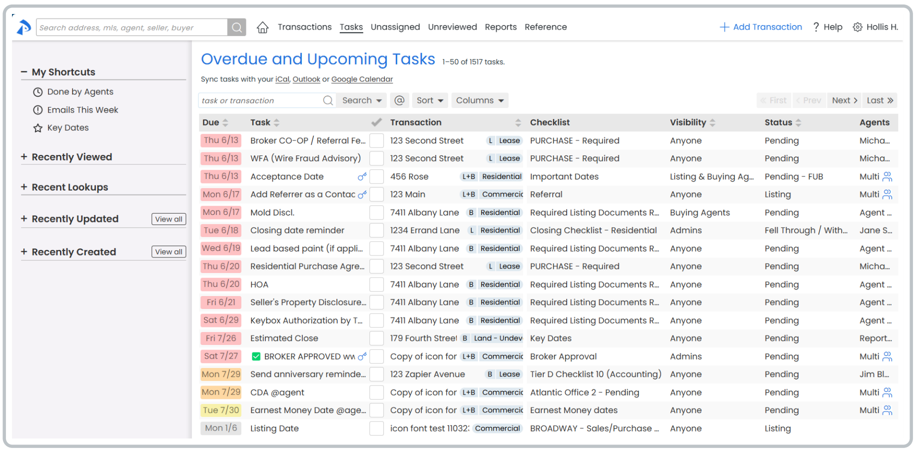
To access & view your Tasks List:

Go To Tasks List Page :

- Click [Tasks] from the top menu.

View Your Tasks List:

- View the required action or doc in the *Task* column.



- View the task's due date in the *Due* column, color-coded based on when the task is due:
  - Overdue tasks are red.
  - Tasks due today are orange.
  - Tasks due tomorrow are yellow.
  - Tasks due in the future (after tomorrow) are gray.

View & Use Task Details:

- View and use the task details to keep track of what needs to get done and get things done (described below).

✔

Complete Tasks:

- Use the ✔ column to mark a task as complete. Learn more about Admin Task Completion →

Transaction

View Transaction:

- View the transaction the task belongs to in the *Transaction* column, including the *Label* and the *Side* your office represents.

Access Transaction:

- Click the [Transaction Name] to go directly to the task on the transaction where the task will be highlighted for easy identification.

Checklist

View Checklist:

- View the name of the checklist the task belongs to in the *Checklist* column.

Visibility Type

View Visiblity:

- View the Visibility Type set for the task in the *Visibility* column.

Status

View Status:

- View the transaction's current Status in the *Status* column.

Agents

View Agents:

- View the name of the agent added to the transaction in the *Agents* column.
- If multiple agents added are added, hover over [Multi] to view the full list of agents added.

Location

View Location:

- View the transaction's Location in the *Location* column.

Close Date

View Close Date:

- Optionally, show the *Close Date* column to view the transaction's Close Date. Learn how to Show & Hide Columns →

Use Your Tasks List

Personalize Your Tasks List View

Learn more →

Sort & Search Tasks

Learn more →

Save Task Shortcuts

Learn more →

Sync Tasks to Your Calendar App

Learn more →

Complete Tasks

Learn more →