

Training Links

Train Your Agent Team to Use Checklists & Tasks

Train Your Agent Team to:

- Use Checklists on Transactions
- Use the Tasks List Page
- Use @Mentions
- Use Relative Due Dates
- Use Key Dates

Train Your Admin Team to Use Checklists & Tasks

Train Your Admin Team to:

- Use Checklists on Transactions
- Use the Tasks List Page
- Use @Mentions
- Use Relative Due Dates
- Use Task Visibility
- Use Key Dates

Train Your Team to Use @Mention →

Train Your Team to Use Key Dates →

Train Your Team to Use Due Dates