

Task Searching & Filtering

Quickly find and prioritize tasks using the sort, search, and filter options on the Tasks Page.

Introduction

Effectively managing tasks is crucial for maintaining an organized and efficient transaction workflow. By using the sort, search, and filter options on the [Tasks Page](#), you can easily find and prioritize the tasks that matter most.

Sort tasks by due date, task name, or transaction details to organize your list in a way that suits your needs. Search to locate specific tasks quickly, and apply filters to narrow down your results based on criteria like key dates, agent-checked tasks, and @mentions.

By sorting, searching, and filtering your Tasks List, you gain control over managing what you need to get done and ensure you stay on top of your responsibilities effectively.

Sort Tasks

Sort tasks by due date, task name, or transaction details to organize your task list efficiently.

Who Can Do This: Anyone can sort tasks.

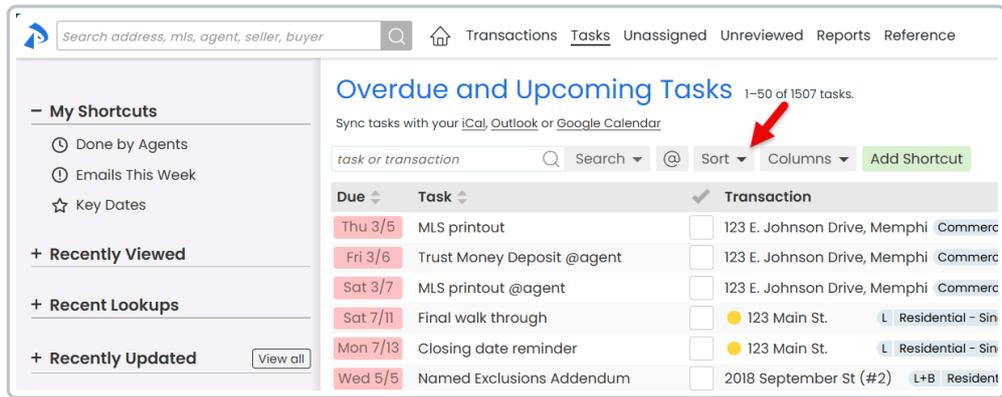
To sort tasks:

1 Go To Tasks List Page :

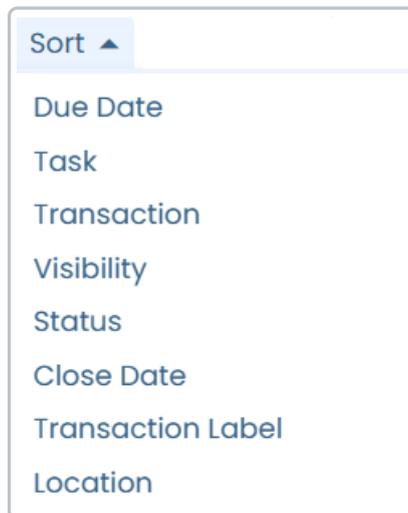
- Click [Tasks] from the top menu.
- By default, tasks are sorted by their Due Date with the soonest dates appearing first.

2 Choose Sort Preference:

- Click [Sort ▼].



- Select the field you want to sort by (described below).
 - Tasks will be displayed to reflect your sorting preference.



Due Date

Sort by Due Date:

- Choose *Due Date* to show tasks with the farthest due dates first.
- Once sorted, reverse the order and display tasks with the soonest due dates first by clicking [] next to the *Due* column.

Task

Sort by Task:

- Choose *Task* to display tasks alphabetically (A-Z) by their name.
- Once sorted, reverse the order and display tasks alphabetically (Z-A) by clicking [] next to the *Task* column.

Transaction

Sort by Transaction:

- Choose *Transaction* to display tasks by *Transaction Name* alphabetically (A-Z).
- Once sorted, reverse the order and display tasks alphabetically (Z-A) by clicking [] next to the *Transaction* column.

Visibility

Sort by Visibility:

- Choose *Visibility* to display tasks by *Visibility Type*, in this order:
 - Anyone
 - Admins
 - Listing Agents
 - Buying Agents
 - Listing & Buying Agents
 - @Mention
- Once sorted, reverse the order by clicking [] next to the *Visibility* column.

Status

Sort by Status:

- Choose *Status* to display tasks grouped by their *Transaction Status* in alphabetical order.
- Once sorted, reverse the order by clicking [] next to the *Status* column.

Close Date

Sort by Close Date:

- Sort by *Close Date* to display tasks with the oldest close dates first.
- Once sorted, reverse the order to display tasks with the newest close dates first by clicking [] next to the *Close Date* column.

Transaction Label

Sort by Transaction Label:

- Choose *Label* to display tasks grouped by their *Transaction Label* in alphabetical order.

- Once sorted, reverse the order by clicking [] next to the *Label* column.

Location

Sort by Location:

- Choose *Location* to display tasks grouped by their *Location* in alphabetical order.
- Once sorted, reverse the order by clicking [] next to the *Location* column.

Search Tasks by Name

Search tasks by name to quickly locate specific tasks.

Who Can Do This: Anyone can search tasks by name.

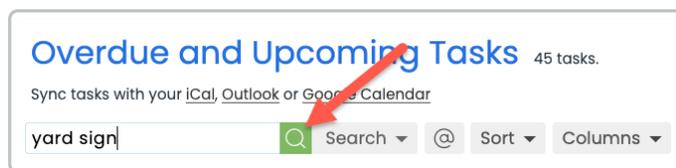
To search tasks by name:

1 Go To Tasks List Page :

- Click [Tasks] from the top menu.

2 Search by Task:

- Enter all or part of the *Task Name* into the *Search* field, then click []
 - Tasks matching your search will be displayed.



Search Tasks by Transaction Name

Search tasks by transaction name to find tasks related to specific transactions.

Who Can Do This: Anyone can search tasks by transaction name.

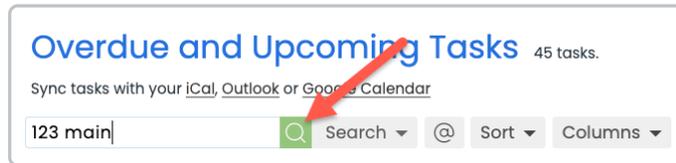
To search tasks by transaction:

1 Go To Tasks List Page :

- Click [Tasks] from the top menu.

2 Search by Transaction:

- Enter all or part of the *Transaction Name* into the Search field, then click [].
 - Tasks matching your search will be displayed.



Filter Tasks

Filter tasks on your Tasks List to narrow down tasks based on criteria like key dates, agent-checked tasks, @mentions, and more.

Who Can Do This: Anyone can filter tasks using advanced search options.

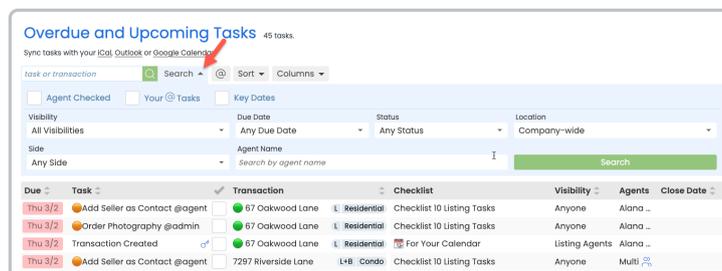
To filter tasks:

1 Go To Tasks List Page :

- Click [Tasks] from the top menu.

2 Use Search Filters:

- Click [Search ▼].



- Choose your desired filter or combination of filters (described below).
- Click the green [Search] button to view the filtered list.

Agent-Checked Tasks

Filter by Agent-checked:

- Check [Agent-checked] to only display tasks that have been Agent-checked.

Your @Tasks

Filter by Your @Tasks:

- Check [Your @ Tasks] to only display tasks where you have been @Mentioned.

Key Date Tasks

Filter by Key Date Tasks:

- Check [Key Dates] to only display Key Date tasks.

Visibility

Filter by Visibility:

- Select the [All Visibilities] dropdown.
- Choose your desired Visibility Type to only display tasks matching that type:
 - Anyone
 - Admins
 - Listing Agents
 - Buying Agents
 - Listing & Buying Agents
 - @Mention

Due Date

Filter by Due Date:

- Select the [Any Due Date] dropdown.
- Choose your desired Due Date filter to only display tasks matching the specified days:
 - Overdue
 - Due Today
 - Due Tomorrow
 - Due Next 7 Days
 - Due Next 14 Days

Status

Filter by Status:

- Select the [Any Status] dropdown.
- Choose your desired Status filter to only display tasks matching the Status Category or Custom Status:
 - Status Category:
 - Custom Status:

Location

Filter by Location:

- Select the [Company-wide] dropdown.
- Choose your desired Location to only display tasks belonging to that specific Location.

Side

Filter by Side:

- Select the [Any Side] dropdown.
- Choose your desired Side to only display tasks for transactions belonging to that specific Side:
 - Listing Side
 - Buying Side
 - Both Sides

Agent Name

Filter by Agent Name:

- In the Agent Name field, start typing the agent's name.
- Select the agent's name when it appears in the list to only display tasks on transactions where they're added.