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:

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 ▼].

Search address, mls, agent, seller, buye	nr C	Transactions <u>Tasks</u> Unassig	ned	Unreviewed Repor	ts Referen	се	
My Shortcuts Done by Agents Gravita This Weak	Overdue and Upcoming Tasks 1-50 of 1507 tasks. Sync tasks with your ICal, Outlook or Google Calendar task or transaction Q Search + @ Sort + Columns + Add Shortcut						
☆ Key Dates	Due 🌲	Task 🌲	~	Transaction			
+ Recently Viewed	Thu 3/5 Fri 3/6	MLS printout Trust Money Deposit @agent		123 E. Johnson Drive 123 E. Johnson Drive	e, Memphi (e, Memphi (Commerc Commerc	
+ Recent Lookups	Sat 3/7	MLS printout @agent		123 E. Johnson Drive	e, Memphi (Commerc	
	Sat 7/11	Final walk through		😑 123 Main St.	L Reside	ntial - Sin	
+ Recently Updated View all	Mon 7/13	Closing date reminder		😑 123 Main St.	L Reside	ntial - Sin	
, , , , , , , , , , , , , , , , , , , ,	Wed 5/5	Named Exclusions Addendum		2018 September St	(#2) L+B	Resident	

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

Sort 🔺
Due Date
Task
Transaction
Visibility
Status
Close Date
Transaction Label
Location

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 [

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 [

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 [

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 [

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:



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:

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.

Overdue and Upcoming Tasks 45 tasks.								
Sync tasks with your <u>iCal, Outlook</u> or <u>Goorse Calendar</u>								
123 main	Q Search 🗸	@	Sort 👻	Columns 👻				

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 ▼].

Overdue and Upcomin Sync tasks with your <u>ICal Outlook</u> or <u>Google Cale</u>	g To	ISKS 45 tasks.						
task or transaction Q Search	• @	Sort 👻 Columns 👻						
Agent Checked Your @ Tasks		Key Dates						
Visibility		Due Date		Status		Location		
All Visibilities	*	Any Due Date	~	Any Status	÷	Company-wide		÷
Side		Agent Name						
Any Side		Search by agent name			1	Sec	irch	
Due 🗘 🛛 Task 🗘	~	Transaction		Checklist		Visibility 🗘	Agents	Close Date
Thu 3/2 OAdd Seller as Contact @age	nt 📃	🔵 67 Oakwood Lane	L Resident	ial Checklist 10 Listin	g Tasks	Anyone	Alana	
Thu 3/2 Order Photography @admin		🔵 67 Oakwood Lane	L Resident	al Checklist 10 Listin	g Tasks	Anyone	Alana	
Thu 3/2 Transaction Created	o*	🔵 67 Oakwood Lane	L Resident	ial 📅 For Your Caler	ndar	Listing Agents	Alana	
Thu 3/2 Add Seller or Contact @age	nt 🗌	7297 Riverside Lane	LAR COD	do Checkliet 10 Lietin	a Taeke	Anvone	Molti 🚥	

- 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 Visibilties] 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.