

## Tasks

Realcomp Online® lets you work with Tasks individually, within the Contact Manager or within the Calendar Function. Tasks are considered your “to do” list. To work individually with tasks, select **My Tasks** from the **Agent** menu option.

| Task Manager             |                          |                             |                                |
|--------------------------|--------------------------|-----------------------------|--------------------------------|
| <a href="#">View All</a> | <a href="#">New Task</a> | <a href="#">Delete Task</a> | <a href="#">Printable View</a> |

➤ **To add a new task:**

1. Click the *New Task* link at the top of the Task manager. The **Add Task** screen appears.

| Task Detail            |  |                             |  |
|------------------------|--|-----------------------------|--|
| <a href="#">Return</a> | <a href="#">Save Task</a>                    | <a href="#">Delete Task</a> |  |
| <b>Task :</b>          |  |                             |  |
| Subject :              | <input type="text"/>                         |                             |  |
| Status :               | <input type="text" value="Not Started"/>     | Type :                      | <input type="text" value="Unknown"/>         |
| Start Date :           | <input type="text" value="January 14 2008"/> | Due Date :                  | <input type="text" value="January 21 2008"/> |
| Start Time :           | <input type="text" value="3 17 PM"/>         | End Time :                  | <input type="text" value="3 17 PM"/>         |
| Assign Contact :       | <input type="text" value="Contacts --&gt;"/> |                             |  |
| Description :          | <input type="text"/>                         |                             |  |
|                        |  | <a href="#">Save Task</a>   | <a href="#">Cancel</a>                       |

2. Enter all applicable information, such as the subject of the task, status, type of task, start and due dates/times, and a description of the task.
  - Enter the Subject text.
  - Select a status by clicking the  next to the **Status** text box. Choose from the list provided:

|                    |
|--------------------|
| <b>Not Started</b> |
| In Progress        |
| Completed          |
| Dismissed          |
| Closing            |


- Select the type of task by clicking the  next to the **Type** text box. Choose from the list provided:

|                  |
|------------------|
| Unknown          |
| <b>Meeting</b>   |
| Phone Call       |
| Event            |
| Letter           |
| Fax              |
| Deadline         |
| Misc Note        |
| Showing          |
| Open House       |
| Tour             |
| Property Closing |

## Realcomp Online® “My Tasks” Support Guide

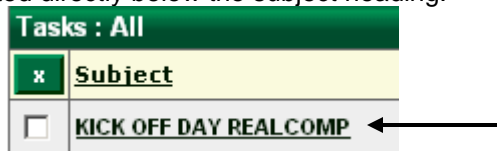
- Choose a start date. To change the month, day or year click the ▾ next to the appropriate text box in the **Start Date** field.
- Choose a due date by using the directions above.
- The **Start Time** and **End Time** fields display the current time. To change these fields, click inside the hour and/or minute text fields    and type the appropriate times. To change **AM** to **PM** click the ▾ and choose **PM** from the list.
- If the task is associated with a contact, select the contact's name by clicking the ▾ next to the **Type** text box. Choose from the list provided.



- Enter the description of the task.
3. Click the  button at the bottom right corner of the screen; or choose the [Save Task](#) link in the top left corner of the screen.

### ➤ To Edit an Existing Task:

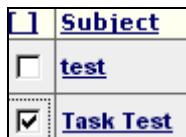
1. Click the task name, located directly below the subject heading.



2. Edit the information as necessary.
3. Click the  button.

### ➤ To Delete a Task:

1. Click the check box next to the task subject name.



**Note:** To select more than one task, select all desired check boxes.  
To select ALL tasks click the [ ] next to the **Subject** heading.

2. Click the [Delete Task](#) hyperlink at the top of the screen.
3. Click **OK**.

### ➤ To Print a List of all Tasks:

1. Click the [Printable View](#) link. A window appears with a list of all tasks.
2. Click Print.