Command Quick Guides

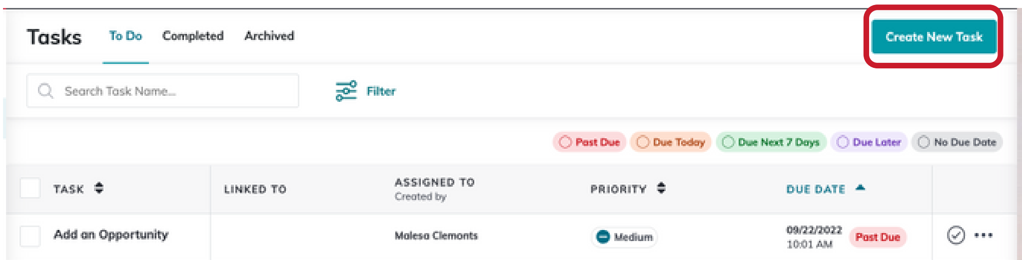
Your Guide to Command: Create Tasks

Access

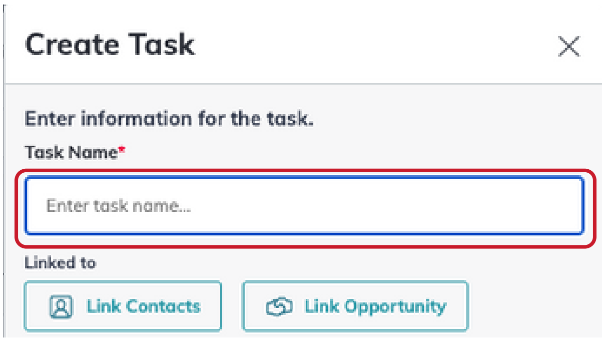
1. Log in to https://agent.kw.com using your Keller Williams login.

2. Click on the **Tasks icon**, , on the left side panel.

3. Click **Create New Task** at the top of the page.



4. Enter the **Task Name**.

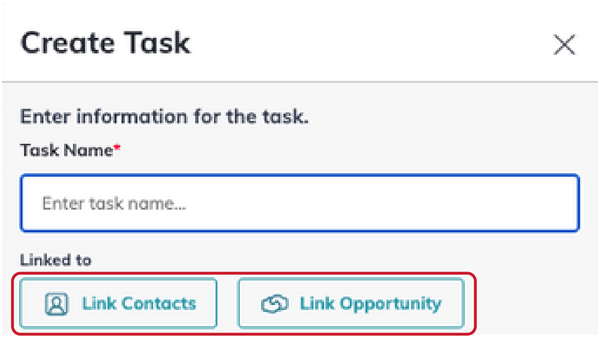


5. Link your task to a contact or an opportunity.

   - This step is optional. A general task will be created if you do not link your task.

   - To link a task to a contact, click **Link Contacts**. A new task will be created using the information input into the Create Task form; important contact information will be pulled over from your Contacts.

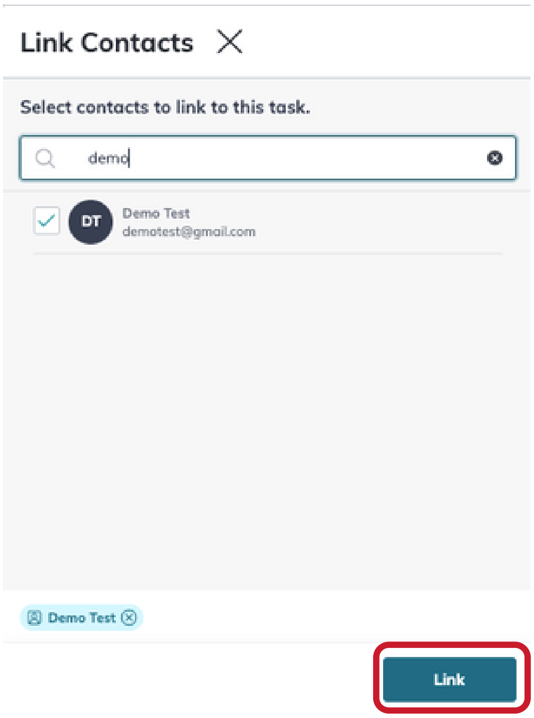
- To link a task to an opportunity, click **Link Opportunity**. Your task will be added to your Opportunity checklist. You can select which Opportunity to link as well as the Opportunity Phase to add the task to.



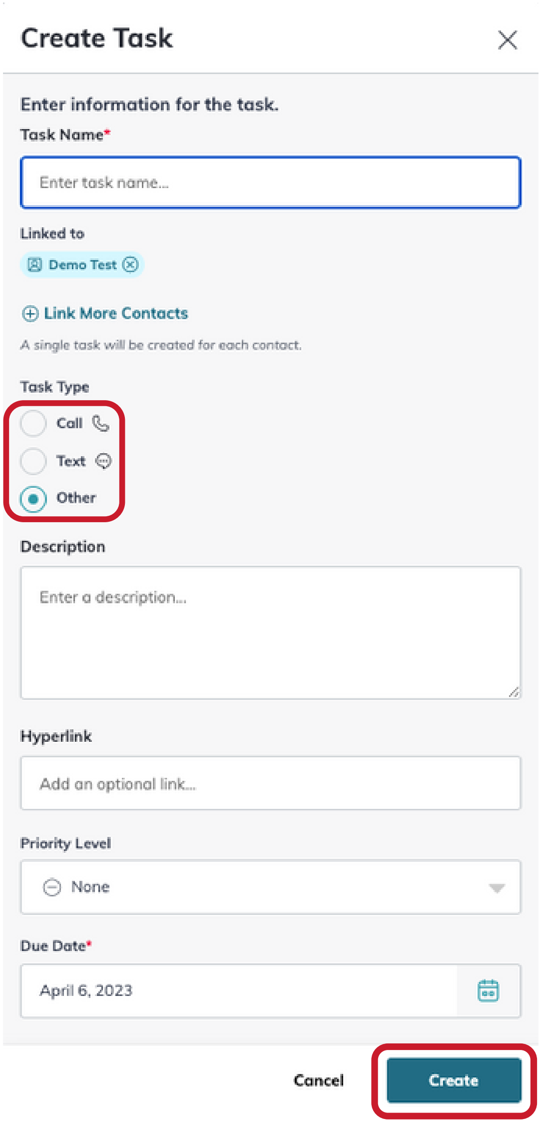
Link Contacts

- After you click Link Contacts, you will be able to search and add up to 50 contacts to link to the task.

- Click **Link** when you are ready.



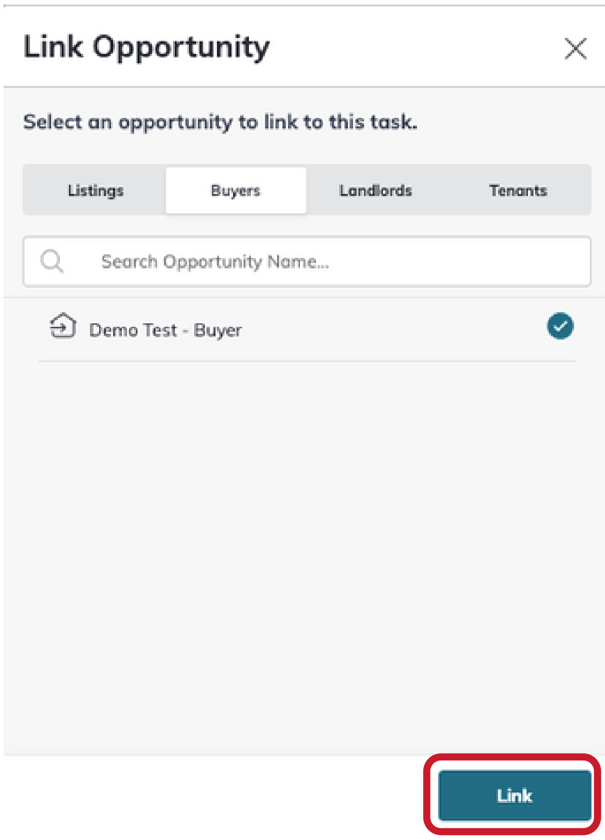
- A new form will pop up. Here you will enter a **Task Name**, choose a task type (call, text, other), and enter other details about your task.
- Click **Create** when you are ready.



Link Opportunity

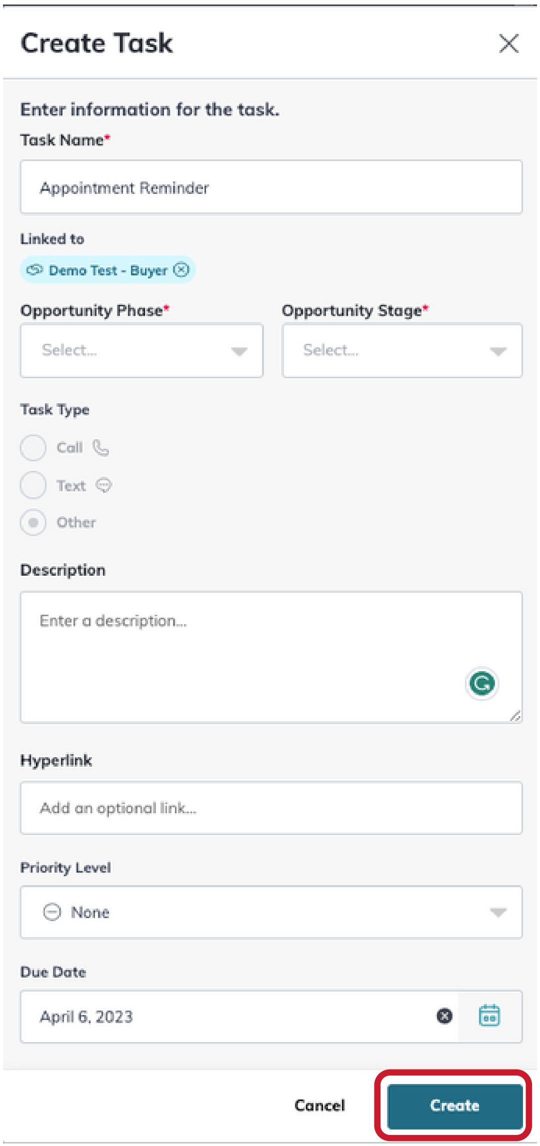
- After you click Link Opportunity, choose the type of opportunity (Listings, Buyers, Landlords, Tenants) and search for the opportunity you want to link.

- Click **Link** when you are ready.



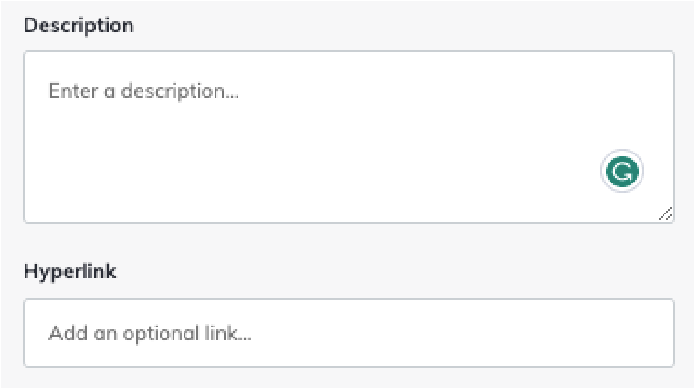
- A new form will pop up. Here you will name your task, choose the opportunity phase and stage for this task to appear, and add details about the task.

- Click **Create** when you are ready.

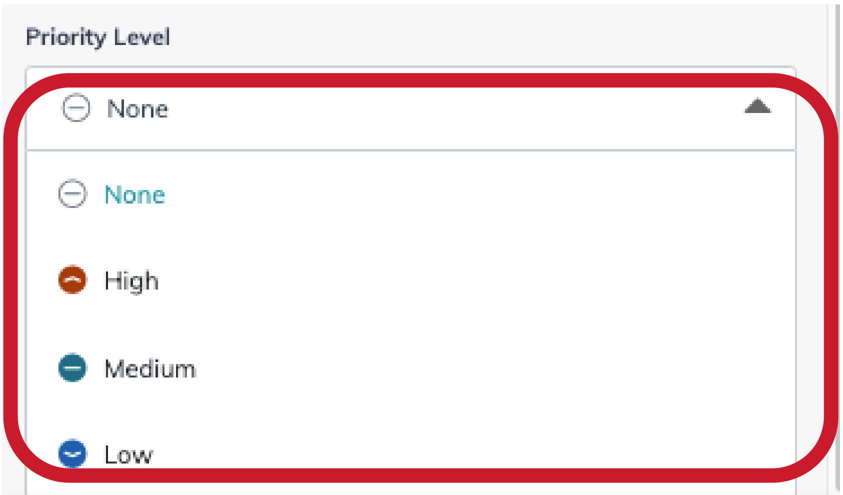


Task Details

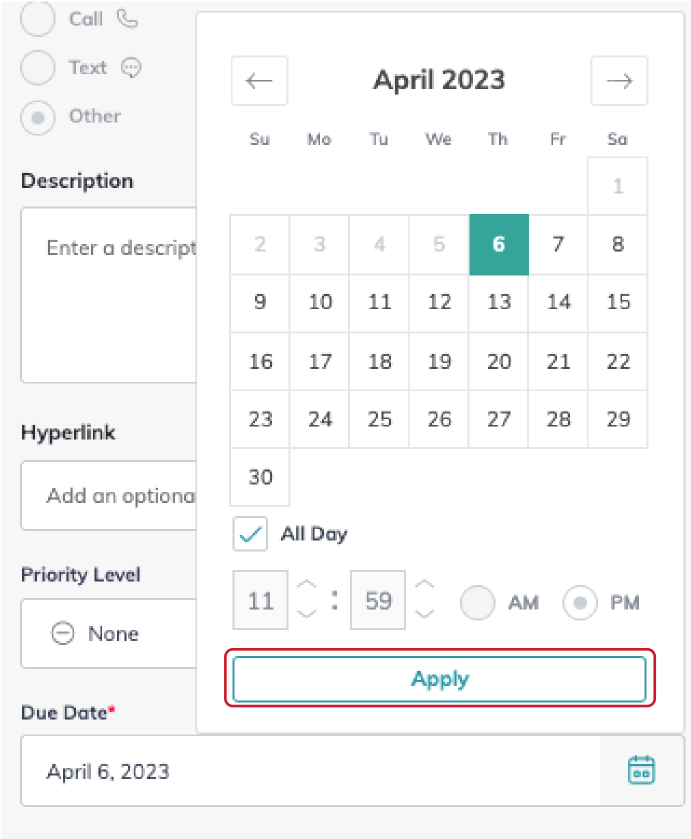
1. Add a description and hyperlink.



2. Set the priority level. This will help you organize your tasks based on their importance.



3. Set the due date. Click on the calendar icon and use the calendar to select the due date. You can also set a time for the task to be due. Click **Apply** when you are finished.



4. Click **Create** when you are finished.