




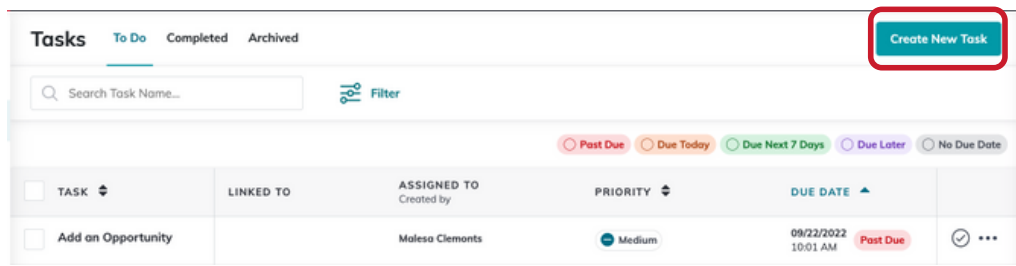
# Command Quick Guides

**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**.

A screenshot of the 'Create Task' form. The form has a title 'Create Task' and a close button. Below the title is the instruction 'Enter information for the task.' The first field is 'Task Name\*' with a red asterisk indicating it is required. The input field contains the placeholder text 'Enter task name...' and is highlighted with a red box. Below the input field are two buttons: 'Link Contacts' and 'Link Opportunity', both with icons representing a person and a document respectively.

5. Link your task to a contact or an opportunity.
  - o This step is optional. A general task will be created if you do not link your task.
  - o 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.

A screenshot of a 'Create Task' dialog box. The title bar says 'Create Task' with a close button (X) on the right. Below the title bar, it says 'Enter information for the task.' followed by 'Task Name\*' and a text input field containing 'Enter task name...'. Below the input field, it says 'Linked to' and there are two buttons: 'Link Contacts' (with a person icon) and 'Link Opportunity' (with a link icon). Both buttons are highlighted with a red rectangular border.

## 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 screenshot of a 'Link Contacts' dialog box. The title bar says 'Link Contacts' with a close button (X) on the right. Below the title bar, it says 'Select contacts to link to this task.' followed by a search input field containing 'demo'. Below the search field, there is a list of contacts. The first contact is 'DT Demo Test demotest@gmail.com' with a checked checkbox to its left. At the bottom of the dialog, there is a 'Demo Test' tag and a 'Link' button, which is highlighted with a red rectangular border.

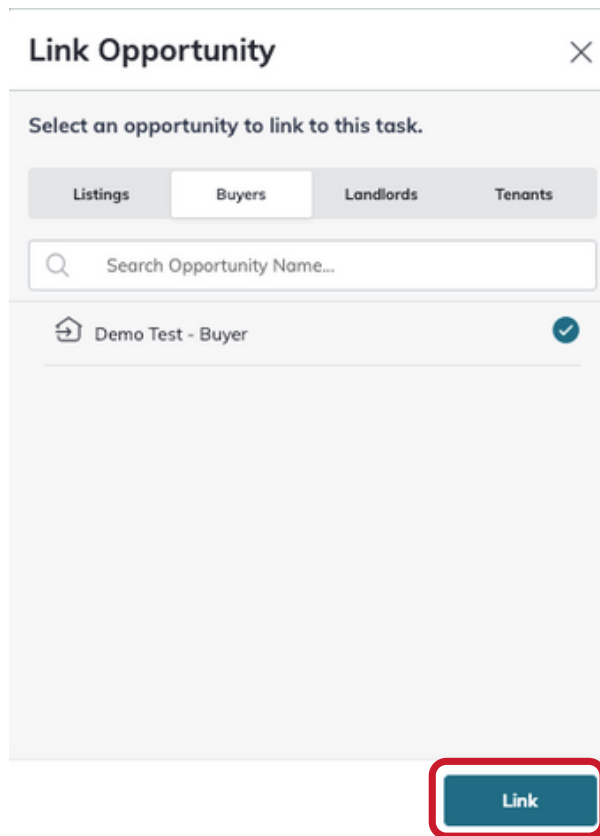


- A new form will pop up. Here you will enter a **Task Name**, choose a task type (call, text, other), and enter other details about your task.
- Click **Create** when you are ready.

A screenshot of a 'Create Task' form. The form is titled 'Create Task' and has a close button (X) in the top right corner. It contains several sections: 'Enter information for the task.' with a 'Task Name\*' field; 'Linked to' with a 'Demo Test' link and a '+ Link More Contacts' button; 'Task Type' with three radio button options: 'Call', 'Text', and 'Other' (which is selected and highlighted with a red box); 'Description' with a text area; 'Hyperlink' with a text field; 'Priority Level' with a dropdown menu set to 'None'; and 'Due Date\*' with a date field set to 'April 6, 2023' and a calendar icon. At the bottom, there are two buttons: 'Cancel' and 'Create' (which is highlighted with a red box).

## 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 screenshot of a web application dialog box titled 'Link Opportunity' with a close button (X) in the top right corner. Below the title is the instruction 'Select an opportunity to link to this task.' There are four tabs: 'Listings', 'Buyers', 'Landlords', and 'Tenants', with 'Buyers' selected. Below the tabs is a search input field with a magnifying glass icon and the placeholder text 'Search Opportunity Name...'. Below the search field is a list item 'Demo Test - Buyer' with a house icon on the left and a checkmark icon on the right. At the bottom right of the dialog box, there is a blue button with the text 'Link' highlighted by a red rectangular border.

- 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.



**Create Task** ✕

Enter information for the task.

**Task Name\***

Appointment Reminder

**Linked to**

[Demo Test - Buyer](#) ✕

**Opportunity Phase\*** **Opportunity Stage\***

Select... Select...

**Task Type**

Call

Text

Other

**Description**

Enter a description...

**Hyperlink**

Add an optional link...

**Priority Level**

None

**Due Date**

April 6, 2023 ✕

Cancel Create

## Task Details

1. Add a description and hyperlink.



**Description**

Enter a description...

**Hyperlink**

Add an optional link...

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

**Priority Level**

- None
- None
- High
- Medium
- Low

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.



Call

Text

Other

**Description**

Enter a description

**Hyperlink**

Add an optional hyperlink

**Priority Level**

None

**Due Date\***

April 6, 2023

**Calendar**

April 2023

Su	Mo	Tu	We	Th	Fr	Sa
						1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30						

All Day

11 : 59 AM  PM

**Apply**

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

**Priority Level**

None

**Due Date\***

April 18, 2023

**Cancel** **Create**