Command Quick Guides

Your Guide to Command: Manage Tasks
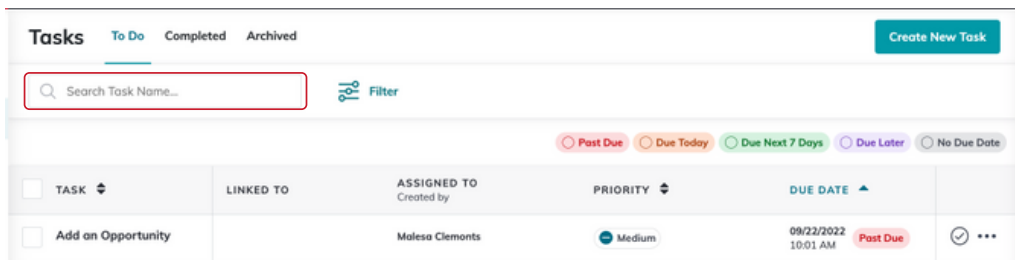
Access
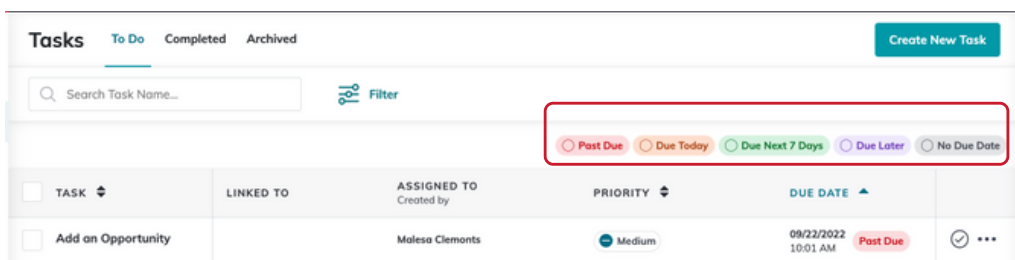
1. Log in to https://agent.kw.com with your Keller Williams login.

2. Click the **Tasks Icon**, ✓☰ , on the left-side panel.

Tasks Search and Filters

1. Search for task names using the **Search Bar**. This search only looks for the name of a task, not associated contacts or opportunities.

2. Use the quick filters to find tasks due during a specific time frame.

3. Click **Filter** next to the search bar to use more detailed filters. Choose one of the following filters and click **Apply Filters** when you are ready.

- Due Date
- Priority Level
- Task Type
- Linked To
- Created By

4. To return to a standard view, click **Clear Filters**.
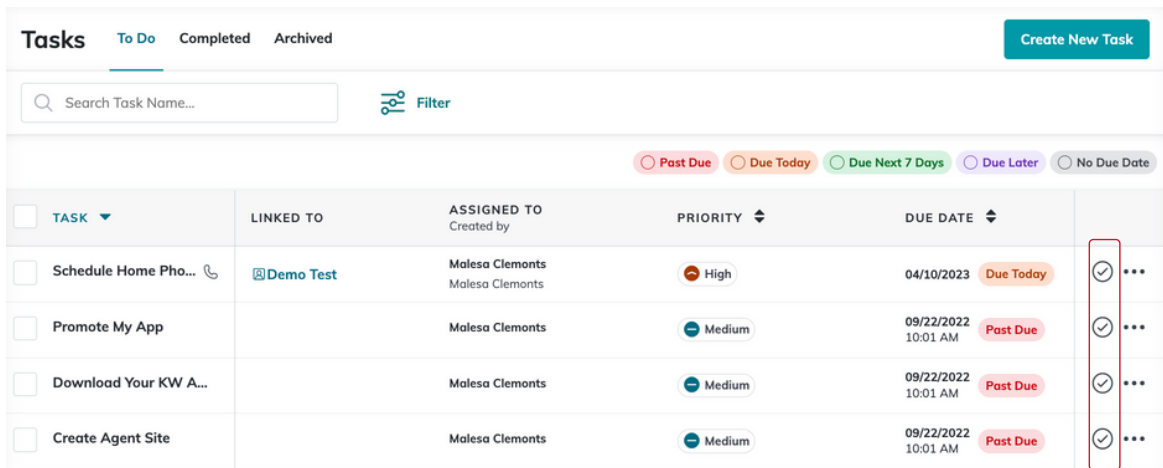
Mark as Complete

1. To mark a task as complete, click the checkmark icon ⊘, to the right of the task.

2. Your completed task will now appear in the Completed section of Tasks.
   ○ If you completed a call/text task, a pop-up will appear. Here you can log the details of the call or text. Click **Complete** when you are done.

Reschedule a Task

1. To reschedule a task, click the three dots to the right of the task and click Reschedule.

   - To reschedule multiple tasks, select the tasks and click Reschedule at the bottom of the page.

2. Extend the due date by a specific number of days, or select a specific date and time to reschedule your task.

   - If you are rescheduling multiple tasks, you will have to select a specific date and time.

4. When you are finished, click **Reschedule**.

Add Notes to a Contact Through a Task

1. If you have a contact associated with a task you will have the ability to add a note to their contact record.

   ○ Click the three dots to the right of a task, and select **Add Note**.

2. When the pop-up appears, enter the **Note Title** and **Description**. Click **Add Note**, when you finish. This note will appear in the Contact Timeline and Notes section of the contact record.

Archive Tasks

1. To archive a task, click the three dots to the right of the task, and select **Archive**.

   o To archive multiple tasks, select the tasks and click **Archive** at the bottom of the page.

Unarchive or Delete Archived Tasks

1. At the top of the page, click the **Archived** tab.

2. Click the three dots to the right of the task, and choose **Unarchive** or **Delete**. Alternatively, you can select multiple tasks, and click **Unarchive** or **Delete** at the bottom of the page.

- If you choose to delete, a confirmation will pop-up, click **Delete**.