




# Command Quick Guides

**Your Guide to Command:  
Manage Tasks**

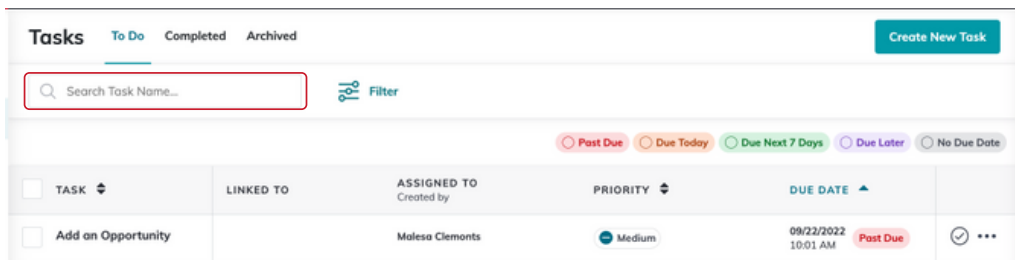


## Access

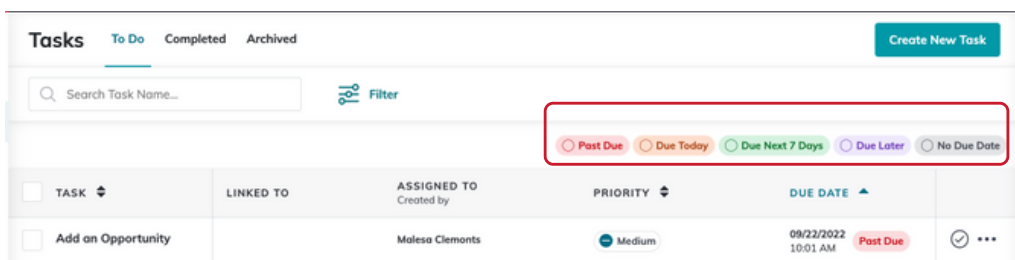
1. Log in to <https://agent.kw.com> with your Keller Williams login.
2. Click the **Tasks Icon**, , on the left-side panel.

## 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



**Filters** [X]

**Due Date** [All] [^]

- All
- Past Due
- Due Today
- Due Next 7 Days
- Due Later
- No Due Date
- Custom Date Range

**Priority Level** [^]

- High
- Medium
- Low
- None

**Task Type** [^]

- Call
- Text
- Other

**Linked To** [^]

- Contact
- Opportunity
- Unlinked

**Created By** [All] [^]

- All
- Me (Malesa Clemonts)
- Opportunities
- SmartPlans

[Reset] [Apply Filters]

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

**Tasks** [To Do] [Completed] [Archived] [Create New Task]


[Search Task Name...] [2 Filters] [Clear Filters X]

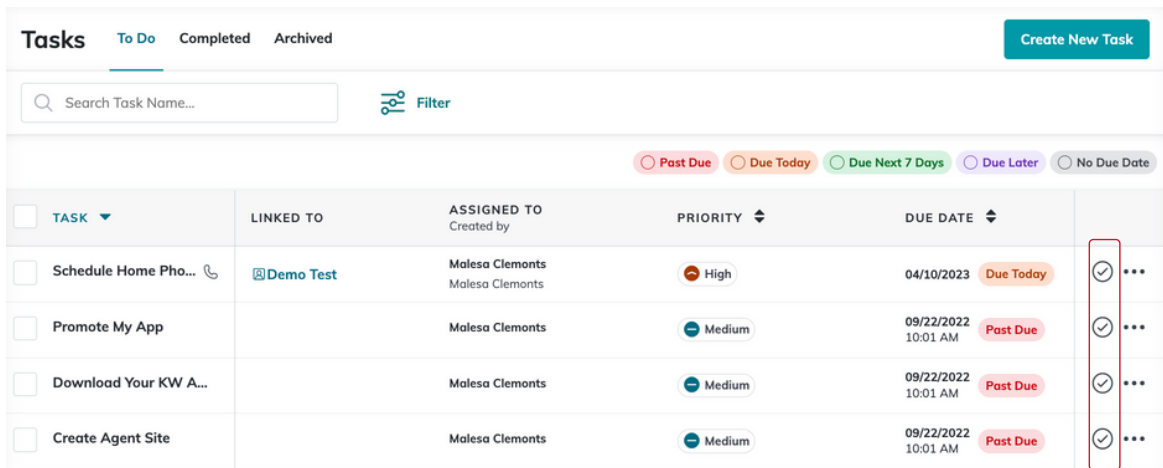
[Past Due] [Due Today] [Due Next 7 Days] [Due Later] [No Due Date]

TASK	LINKED TO	ASSIGNED TO Created by	PRIORITY	DUE DATE	
<input type="checkbox"/> Schedule Home Pho...	[Demo Test]	Malesa Clemonts Malesa Clemonts	High	04/10/2023 [Due Today]	[Checkmark] [More]



## Mark as Complete

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

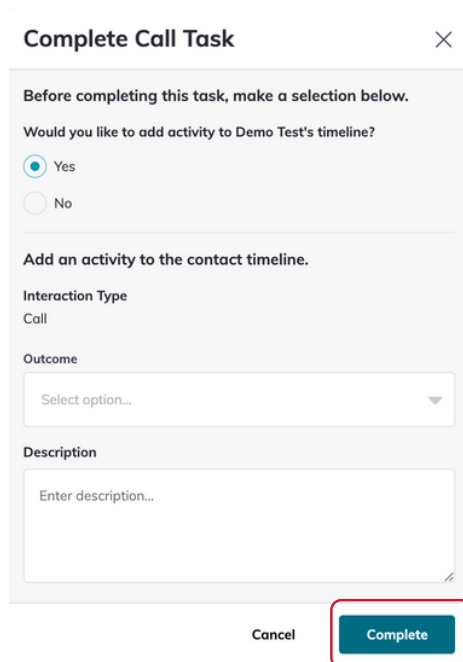


The screenshot shows a 'Tasks' management interface. At the top, there are tabs for 'To Do', 'Completed', and 'Archived', with 'To Do' selected. A 'Create New Task' button is in the top right. Below the tabs is a search bar and a 'Filter' icon. A row of filter buttons includes 'Past Due', 'Due Today', 'Due Next 7 Days', 'Due Later', and 'No Due Date'. The main table lists tasks with columns for 'TASK', 'LINKED TO', 'ASSIGNED TO', 'PRIORITY', and 'DUE DATE'. The first task, 'Schedule Home Pho...', is highlighted with a red box around its checkmark icon in the rightmost column.

TASK	LINKED TO	ASSIGNED TO	PRIORITY	DUE DATE	
<input type="checkbox"/> Schedule Home Pho...	<a href="#">@Demo Test</a>	Malesa Clemonts Malesa Clemonts	High	04/10/2023 Due Today	<input checked="" type="checkbox"/> ...
<input type="checkbox"/> Promote My App		Malesa Clemonts	Medium	09/22/2022 10:01 AM Past Due	<input checked="" type="checkbox"/> ...
<input type="checkbox"/> Download Your KW A...		Malesa Clemonts	Medium	09/22/2022 10:01 AM Past Due	<input checked="" type="checkbox"/> ...
<input type="checkbox"/> Create Agent Site		Malesa Clemonts	Medium	09/22/2022 10:01 AM Past Due	<input checked="" type="checkbox"/> ...

2. Your completed task will now appear in the Completed section of Tasks.

- o 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.



The 'Complete Call Task' pop-up form contains the following elements:

- Complete Call Task** (Title)
- Close button (X)
- Text: "Before completing this task, make a selection below."
- Text: "Would you like to add activity to Demo Test's timeline?"
- Radio buttons:  Yes,  No
- Text: "Add an activity to the contact timeline."
- Text: "Interaction Type"
- Text: "Call"
- Text: "Outcome"
- Dropdown menu: "Select option..."
- Text: "Description"
- Text input field: "Enter description..."
- Buttons: "Cancel" and "Complete" (highlighted with a red box)



## 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.

The screenshot shows a task management interface with a table of tasks. The table has columns for 'TASK', 'LINKED TO', 'ASSIGNED TO', 'PRIORITY', and 'DUE DATE'. Two tasks are selected, and a context menu is open over the first task, showing options like 'Edit', 'Reschedule', 'Add Note', and 'Archive'. At the bottom of the interface, a 'Reschedule' button is highlighted with a red box.

TASK	LINKED TO	ASSIGNED TO	PRIORITY	DUE DATE
<input checked="" type="checkbox"/> Schedule Home Pho...	Demo Test	Malesa Clemonts	High	04/10/2023 Due Today
<input checked="" type="checkbox"/> Promote My App		Malesa Clemonts	Medium	09/22/2022 10:01 AM Past Due
<input type="checkbox"/> Download Your KW A...		Malesa Clemonts	Medium	09/22/2022 10:01 AM Past Due
<input type="checkbox"/> Create Agent Site		Malesa Clemonts	Medium	09/22/2022 10:01 AM Past Due
<input type="checkbox"/> Connect Applications		Malesa Clemonts	Medium	09/22/2022 10:01 AM Past Due
<input type="checkbox"/> Add an Opportunity		Malesa Clemonts	Medium	09/22/2022 10:01 AM Past Due

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.



### Reschedule Task

Set a new due date for the task.

Task Name: Add an Opportunity  
Current due date: Sep 22, 2022 at 10:01 AM

Extend the due date by a number of days.

Number of Days\*

4

New due date: Apr 14, 2023 at 10:01 AM

Select a specific due date and time.

### Reschedule Task

Set a new due date for the task.

Task Name: Add an Opportunity  
Current due date: Sep 22, 2022 at 10:01 AM

Extend the due date by a number of days.

Select a specific due date and time.

Due Date

April 11, 2023

**Calendar View:** 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

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**.

The screenshot shows a 'Tasks' interface with tabs for 'To Do', 'Completed', and 'Archived'. A search bar and a 'Filter' button are at the top. Below are several tasks with columns for 'TASK', 'LINKED TO', 'ASSIGNED TO', 'PRIORITY', and 'DUE DATE'. A red box highlights the 'Add Note' button in the actions menu for the 'Promote My App' task.

TASK	LINKED TO	ASSIGNED TO	PRIORITY	DUE DATE	
Schedule Home Pho...	Demo Test	Malesa Clemonts	High	04/10/2023	Due Today
Promote My App		Malesa Clemonts	Medium	09/22/2022 10:01 AM	Past Due
Download Your KW A...		Malesa Clemonts	Medium	09/22/2022 10:01 AM	Past Due
Create Agent Site		Malesa Clemonts	Medium	09/22/2022 10:01 AM	Past Due

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.

The 'Add Contact Note' pop-up form has a title bar with a close button. The main content area contains the following text: 'Add a note to the contact record for Demo Test. You can find this note in the Notes tab in Contacts.' Below this are two input fields: 'Note title \*' with the value 'Task: Schedule Home Photos' and 'Description \*' with the placeholder 'Add a note...'. At the bottom, there are 'Cancel' and 'Add Note' buttons, with the 'Add Note' button highlighted by a red box.



## 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.

The screenshot shows a 'Tasks' management interface. At the top, there are tabs for 'To Do', 'Completed', and 'Archived', with 'To Do' selected. A 'Create New Task' button is in the top right. Below the tabs is a search bar and a 'Filter' icon. A status bar shows filters for 'Past Due', 'Due Today', 'Due Next 7 Days', 'Due Later', and 'No Due Date'. The main area is a table with columns: TASK, LINKED TO, ASSIGNED TO (Created by), PRIORITY, and DUE DATE. The table contains six tasks, with the first two selected. A context menu is open for the second task, 'Promote My App', with the 'Archive' option highlighted in a red box. At the bottom, a summary bar shows '2 ITEMS SELECTED (LIMIT: 50 ITEMS)' and buttons for 'Select All', 'Clear Selection', 'Reschedule', 'Change Priority', and 'Archive' (highlighted in a red box). A pagination bar at the very bottom indicates 'Viewing 1-6 of 6'.

TASK	LINKED TO	ASSIGNED TO Created by	PRIORITY	DUE DATE	
<input checked="" type="checkbox"/> Schedule Home Pho...	Demo Test	Malesa Clemonts Malesa Clemonts	High	04/10/2023 Due Today	☑ ...
<input checked="" type="checkbox"/> Promote My App		Malesa Clemonts	Medium	09/22/2022 10:01 AM Past Due	Edit Reschedule Add Note <b>Archive</b>
<input type="checkbox"/> Download Your KW A...		Malesa Clemonts	Medium	09/22/2022 10:01 AM Past Due	
<input type="checkbox"/> Create Agent Site		Malesa Clemonts	Medium	09/22/2022 10:01 AM Past Due	
<input type="checkbox"/> Connect Applications		Malesa Clemonts	Medium	09/22/2022 10:01 AM Past Due	☑ ...
<input type="checkbox"/> Add an Opportunity		Malesa Clemonts	Medium	09/22/2022 10:01 AM Past Due	☑ ...

## Unarchive or Delete Archived Tasks

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





Tasks To Do Completed **Archived** Create New Task

Search Task Name... Filter

TASK	LINKED TO	ASSIGNED TO Archived by	PRIORITY	DATE ARCHIVED	
<input type="checkbox"/> Connect Applications		Malesa Clemonts Malesa Clemonts	Medium	04/10/2023	...
<input type="checkbox"/> Download Your KW A...		Malesa Clemonts Malesa Clemonts	Medium	04/10/2023	...

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.

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

Tasks To Do Completed **Archived** Create New Task

Search Task Name... Filter

TASK	LINKED TO	ASSIGNED TO Archived by	PRIORITY	DATE ARCHIVED	
<input checked="" type="checkbox"/> Connect Applications		Malesa Clemonts Malesa Clemonts	Medium	04/10/2023	...
<input checked="" type="checkbox"/> Download Your KW A...		Malesa Clemonts Malesa Clemonts	Medium	04/10/2023	...

2 ITEMS SELECTED (LIMIT: 50 ITEMS) Select All Clear Selection Unarchive Delete

Viewing 1-2 of 2