

How to schedule a task in an Opportunity?

eGO users can schedule tasks regarding Opportunities, Properties or Contacts.

Tasks are simple daily activities such as contacting the client, reminding someone of a meeting, etc. Tasks can be scheduled from opportunities, properties or contacts.

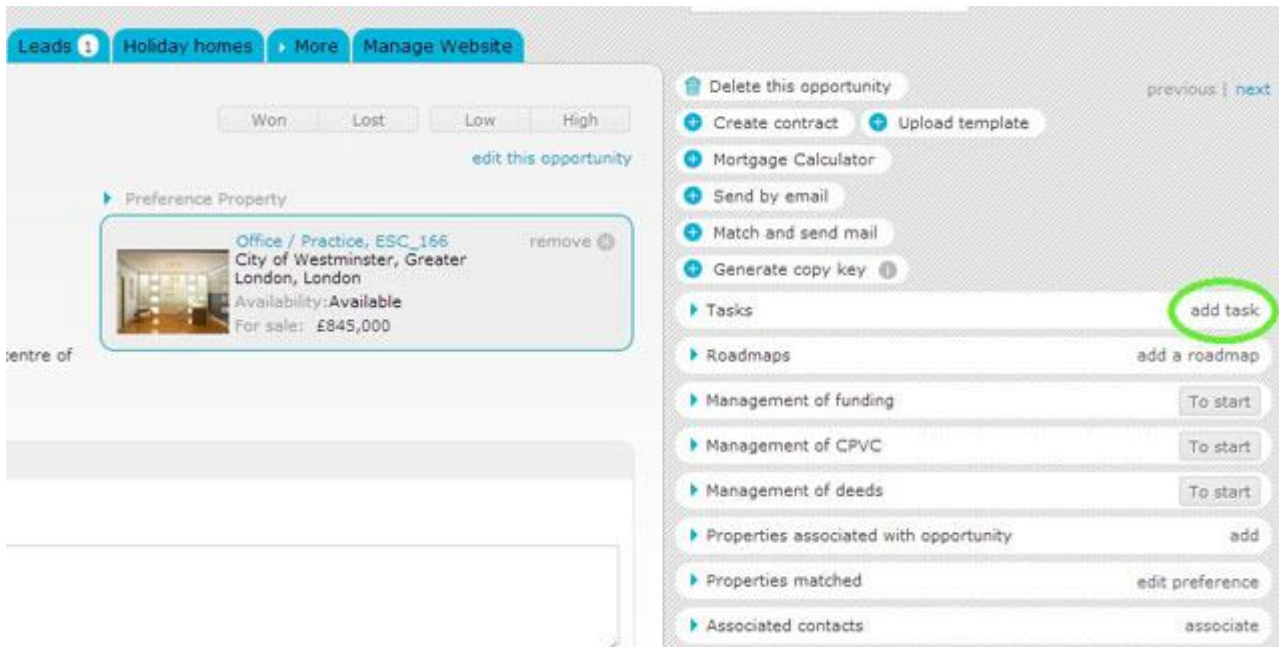
To add a task in an opportunity, you should take the following steps:

Note: To add tasks related to properties or contacts follow the same steps.

1. Go to '**Opportunities**' tab and select the opportunity you want to work on.

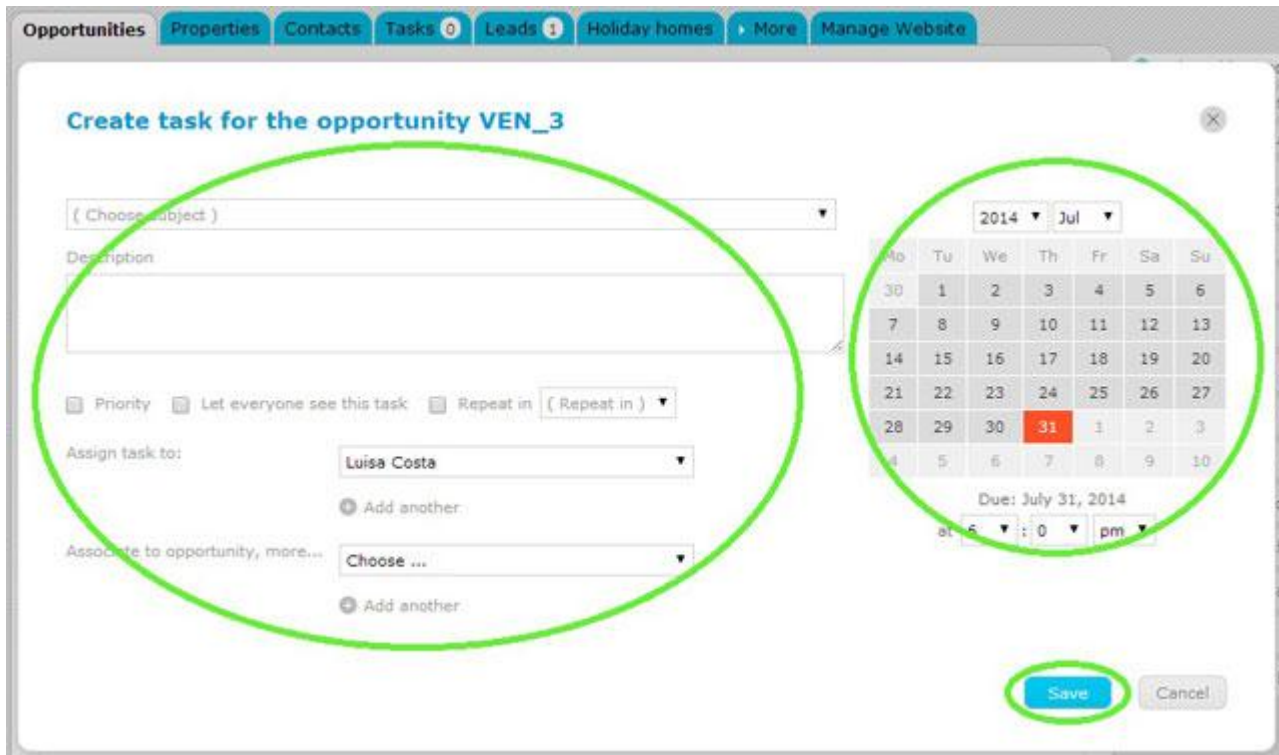
The screenshot displays the eGO Academy software interface. At the top, there is a navigation bar with several tabs: 'Opportunities', 'Properties', 'Contacts', 'Tasks 0', 'Leads 1', 'Holiday homes', 'More', and 'Manage Website'. The 'Opportunities' tab is highlighted with a green circle. Below the navigation bar, there is a search bar for opportunities with the text '(Group, Responsible, Co-responsible, Status, Who created)' and a link to 'advanced search ...'. Below the search bar, it says '3 Opportunities, active, recently updated.' There is a dropdown menu for 'Show' set to 'Recently updated (Active)'. Below the dropdown, there is a 'Select' button and a list of actions: 'Add a tag', 'Email', 'Print', 'Delete', and 'More'. The first opportunity in the list is 'Sale, VEN_3', which is highlighted with a green circle. It includes details such as 'Potential client: Agatha Hayes', 'Phone: (44) 78211159932', 'Email: a.hayes@yahoo.co.uk', and 'Preference Property: Search from 3 rooms, from 200000 £, city of london, london, united kingdom, apartment.' There is also an 'add tags' button below the details.

2. On the right menu click 'Add task';

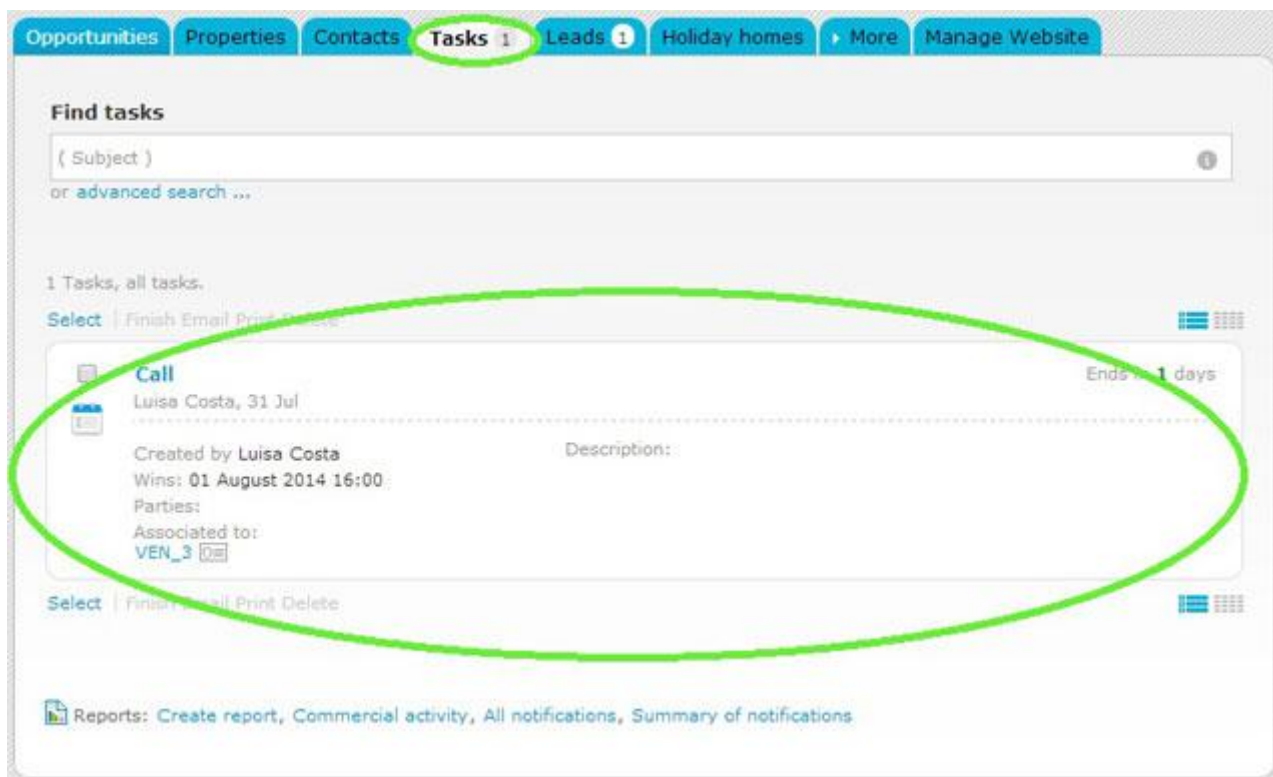
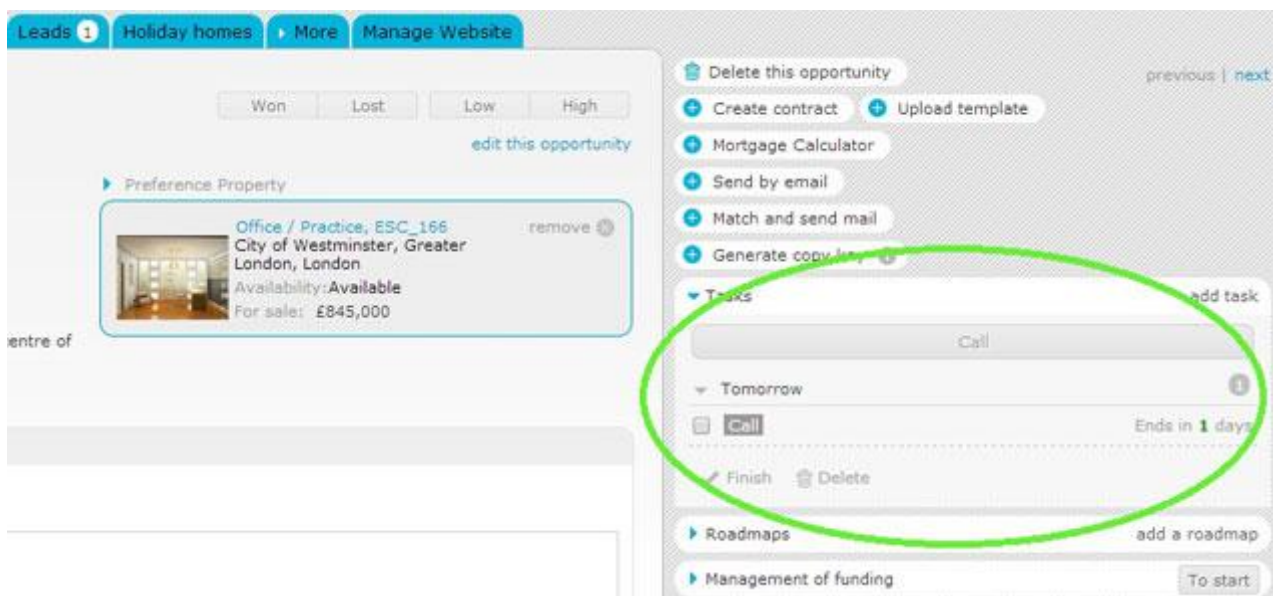


3. In the new task window, choose a subject, enter a description, select whether or not it is a priority task, choose the repeating period (and the task will be repeated daily/ weekly/ monthly), the person in charge of the task and select the time and date when you want the task to be accomplished.

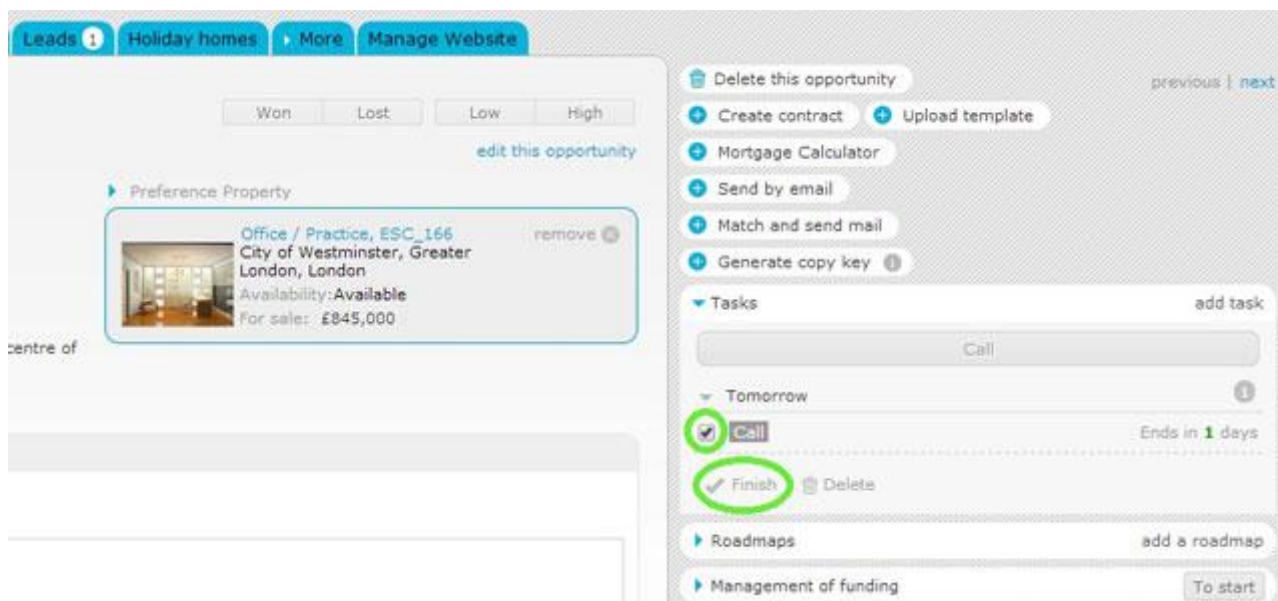
When you fill in all the information, click 'Save';



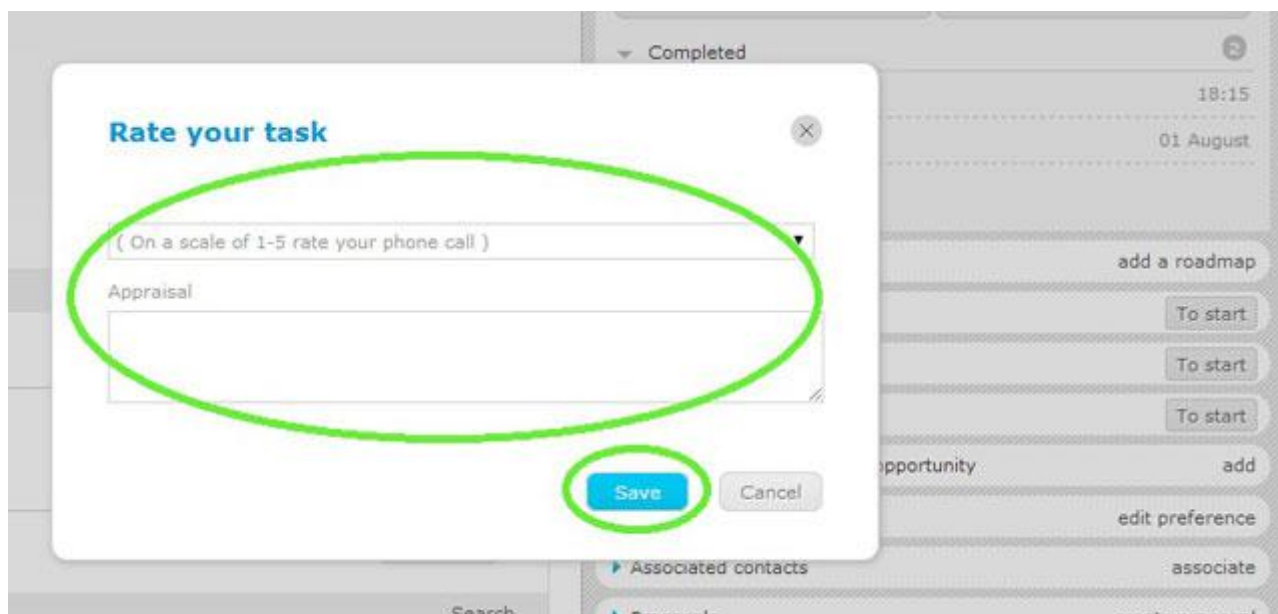
4. The task will be added and will become available not only in the 'Tasks' area within the opportunity, but also in the 'Tasks' tab.



5. When you finish a task, select the task and click '**Finish**', so that there are no overdue tasks.



6. When you finish a task, you can rate it. When you finish rating the task, click '**Save**'.



7. The description you wrote on the previous step will be registered in the opportunity notes.

The screenshot displays a CRM interface for an opportunity titled "Sale, VEN_3" with a status of "Low". The interface includes a navigation bar with tabs for "Opportunities", "Properties", "Contacts", "Tasks", "Leads", "Holiday homes", "More", and "Manage Website". The main content area shows client details for Agatha Hayes, a price of 200,000 £, and a description: "Customer interested in a 3 bedroom apartment in the centre of London up to 200,000£". A "Preference Property" section lists "Office / Practice, ESC_166" in London for sale at £845,000. Below this is a form to "Adding note about" with a dropdown menu set to "Manage" and an "Add note" button. At the bottom, a list of notes is shown, with one note from João Verissimo dated Friday, July 25, 12:12, stating "The owner was happy to receive our call and is willing to sell the house cheaper." This note is circled in green.

Note: When adding a task, the person in charge of it will only receive an email with the task description if the notifications option '**Receive email notifications of tasks**' is selected on his profile.

Learn more at: <http://academia.egorealestate.com>

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