eGO Academy

Software

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.

Find opportunities							
(Group, Responsible, Co-re	sponsible, Stat	tus, Who cri	eated)				0
or advanced search							
Opportunities, active, recent	ly updated.						
Show Recently updated (Act	ive)	•					
Select Add a tag Email Print	Delete More						
Select Add a tag Email Print	Delete More						
Select Add a tag Email Print							
Solito Custodio, 30 M	lay						
Sale, VEN_3	lay tha Hayes			s Property om 3 rooms, from	200000 6	ity of landon long	for united

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

	1 Delete this opportunity	previous nex
Won Lost Low High	O Create contract O Upload template	
edit this opportunity	O Mortgage Calculator	
Preference Property	Send by email	
Office / Practice, ESC_166 remove ()	Match and send mail	
City of Westminster, Greater London, London	Generate copy key ()	1000
Availabile For sale: £845,000	▶ Tasks	add task
re of	▶ Roadmaps	add a roadmap
	Management of funding	To start
	Management of CPVC	To start
	Management of deeds	To start
	Properties associated with opportunity	add
	Properties matched	edit preference
	Associated contacts	associate

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';

(Choose ubject)		1	/	2014	•)(al 🔻		5
Description		Ao	Tu	We	Th	Fr	Sa	Su
1		30	1	2	3	4	5	6
		7	8	9	10	11	12	13
		14	15	16	17	18	19	20
Priority 📄 Let eve	ryone see this task 🛛 Repeat in (Repeat in) 🔹	21	22	23	24	25	26	27
	nneadd yn readd y a constant a tradaeth ar	28	29	30	-31	3	2	3
Assign task to:	Luisa Costa 🔹	1	5.	6	2	0.	.9	3,0
S	Add another	1		Due:	July 3	1, 2014	4	/
N			81	6 1	: 0	• pm		2
Associate to opportunity	Choose							
	O Add another							

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.

Leads 1 Holiday homes More Manage Website		
	Delete this opportunity	previous next
Won Lost Low	High O Create contract O Upload template	
edit this	opportunity O Mortgage Calculator	
Preference Property	Send by email	
Office / Practice, ESC_166 r	emove Match and send mail	
City of Westminster, Greater London, London	Generate copy in G	
Availability:Available For sale: £845,000	Tasks	add task
entre of	cal	
	- Tomorraw	0
		Ende in 1 days
	Finish 🔮 Delete	/
	Roadmaps	add a roadmap
	Management of funding	To start

(Sub) or adva	ect) anced search		.0
Tasks	, all tasks.		
elect	Finish Email Print Prints		
-	Call Luisa Costa, 31 Jul		Ends 1 days
	Created by Luisa Costa Wins: 01 August 2014 16:00 Parties: Associated to: VEN_3 000	Description:	
elect	Finance all Print Delete		121

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

Leads 1 Holiday	homes More Manage Website			
		😑 Delete this apportunity	previous next	
	Won Lost Low High	Create contract 0 Upload template		
	edit this opportunity	Mortgage Calculator		
Prefere	ince Property	Send by email		
	Office / Practice, ESC_166 remove O	Match and send mail		
DEPER-	City of Westminster, Greater London, London	Generate copy key		
5	Availability: Available For sale: £845,000	- Tasks	add task	
centre of		Call		
		- Tomorrow	0	
			Ends in 1 days	
		Finish 🖞 Delete		
		▶ Roadmaps	add a roadmap	
		Management of funding	To start	

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

	- Completed		0
			18:15
Rate your task	×		01 August
(On a scale of 1-5 rate your phone call)	1		add a roadmap
Appraisal)		To start
			To start
			To start
	Save Cancel	pportunity	add
			edit preference
	Associated contacts		associate
Search	Proposals		create propora

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

	Wan Lost Low High
Sofia Custódio, changed in 31 July 2014	edit this opportun
otential client: Agatha Hayes	Preference Property
none: (44) 78211159932	
mail: a.hayes@yahoo.co.uk	Office / Practice, ESC_166 remove City of Westminster, Greater
rigin: Friend	London, London
rice: 200000 £	Availability:Available For sale: £845,000
escription: ustomer interested in a 3 bedroom apartment in the cer ondon up to 200.000£	ntre of
edit timelines	
Adding note about	
(Select the note type) • Manage	
	8
Attach files	Add note
All Notes Users Notes System Notes Logs	Add note Search

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: <u>http://academia.egorealestate.com</u>

Questions: <u>support@egorealestate.com</u>