

How to manage your agenda on eGO?

eGO users can daily check their agenda to see which tasks they have for that day/week.

eGO task manager is an excellent tool to keep your tasks organized and updated. Tasks can be scheduled in opportunities, properties, contacts or directly in the **"Tasks"** tab: Read the how to schedule a task tutorial here

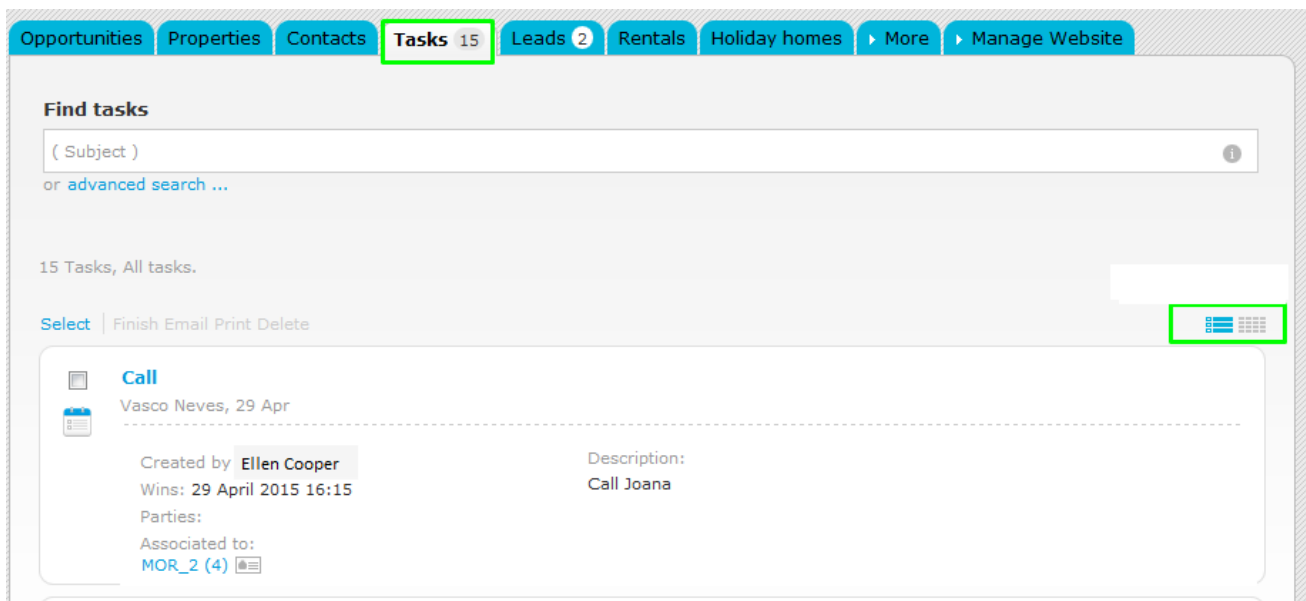
After scheduling the task, you need to know how to view it. To do so, take the following steps:


1. Open the **"Tasks"** tab on your eGO. The number you see on the tab is the number of tasks (of all users) scheduled on eGO.

The screenshot displays the eGO interface with the 'Tasks' tab selected and highlighted with a green box. The tab shows '15' tasks. Below the navigation bar, there is a 'Find tasks' section with a search input field containing '(Subject)' and a link to 'advanced search ...'. Below this, it states '15 Tasks, All tasks.' and provides navigation links 'First page' and 'Next'. A toolbar includes 'Select', 'Finish', 'Email', 'Print', and 'Delete'. The task list contains two entries:

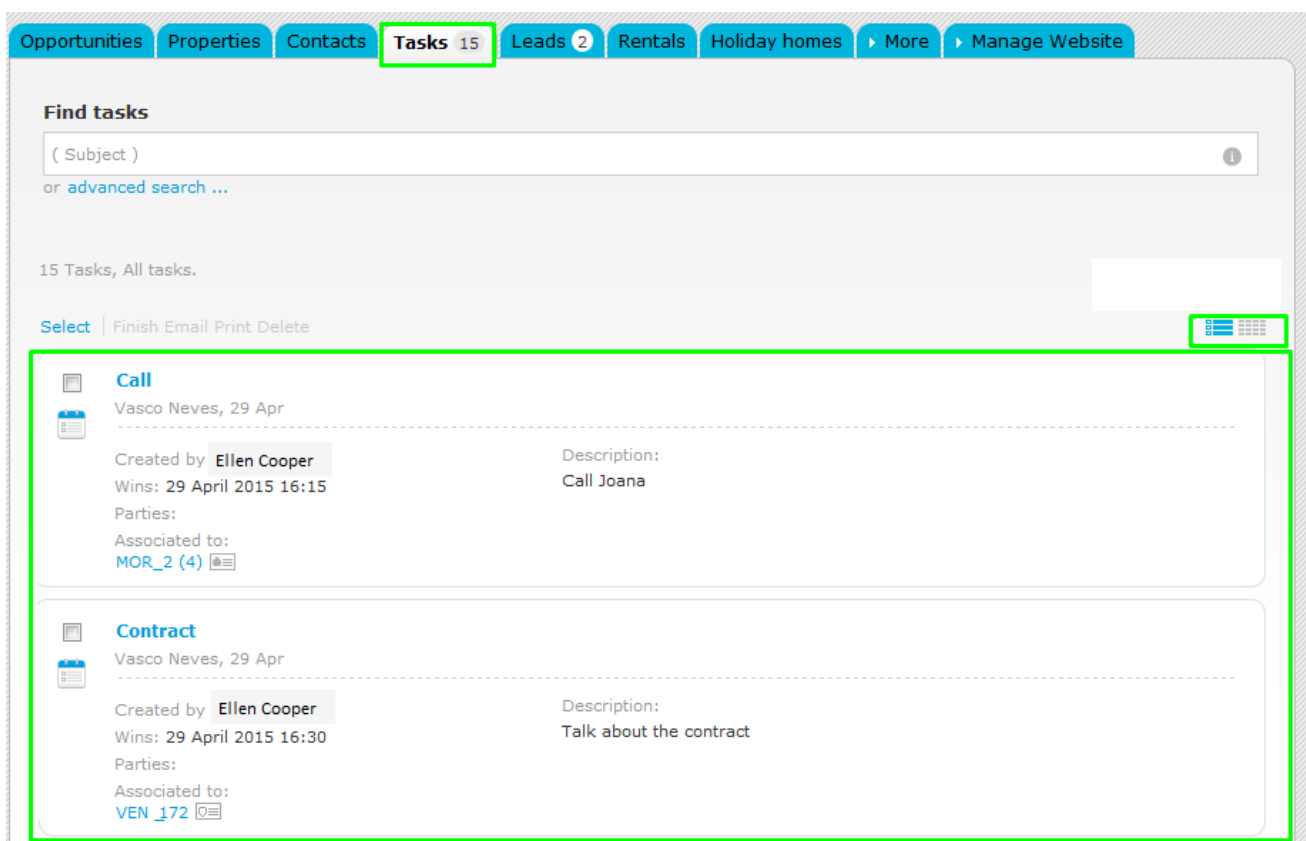
- Call**
Vasco Neves, 29 Apr
Created by: Ellen Cooper
Wins: 29 April 2015 16:15
Parties:
Associated to: MOR_2 (4)
- Contract**
Vasco Neves, 29 Apr
Created by: Ellen Cooper
Wins: 29 April 2015 16:30
Parties:
Associated to: VEN_172


2. There are two different types of view you can choose:



2.1 The first view type  shows you all the tasks which were scheduled on eGO (as long as your permissions allow you to), these tasks can be yours or from any other co-worker.

NOTE: The overdue tasks will be shown as overdue tasks and you'll be able to see the number of days in arrears.



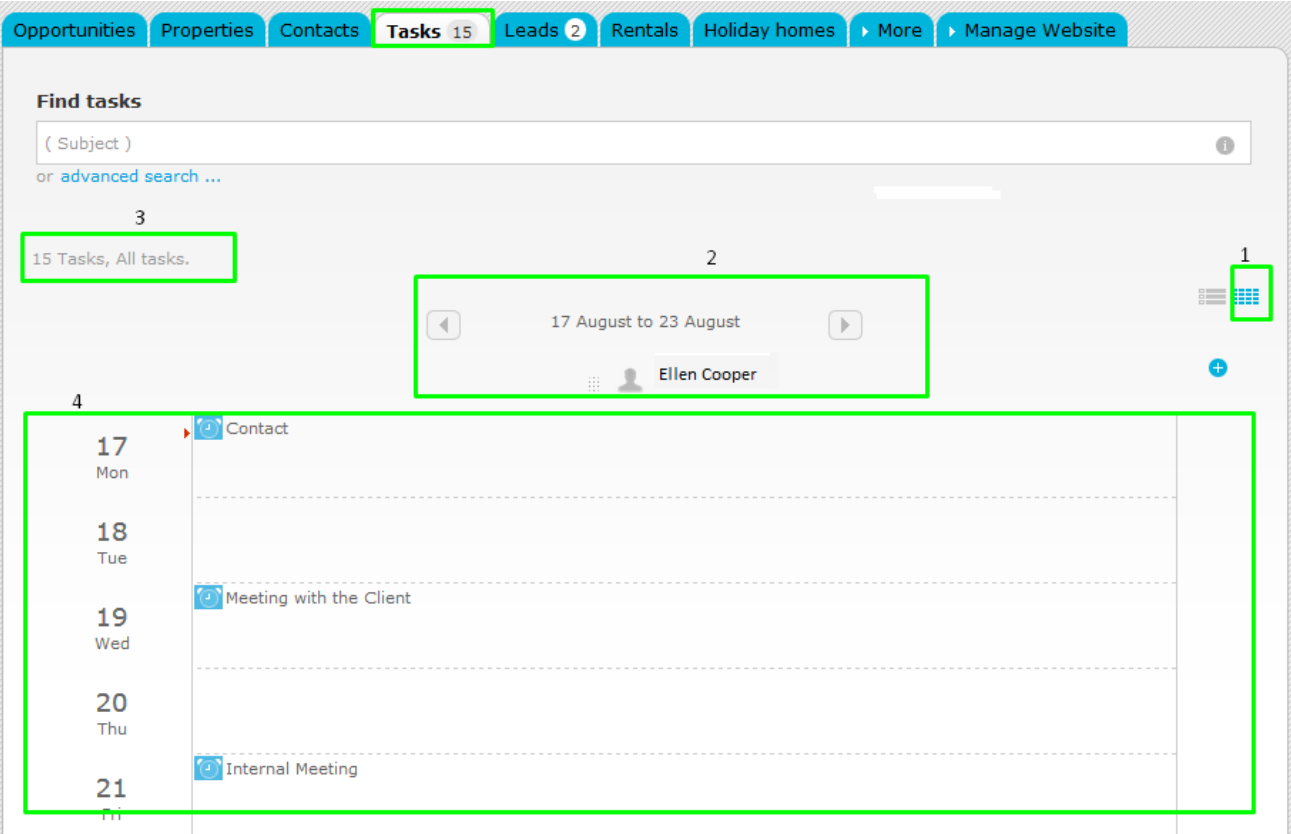
2.2 The second view type  shows your tasks in a weekly view.

1 – Weekly view

2 – Current week

3 – Overall number of tasks on eGO (of all eGO users)

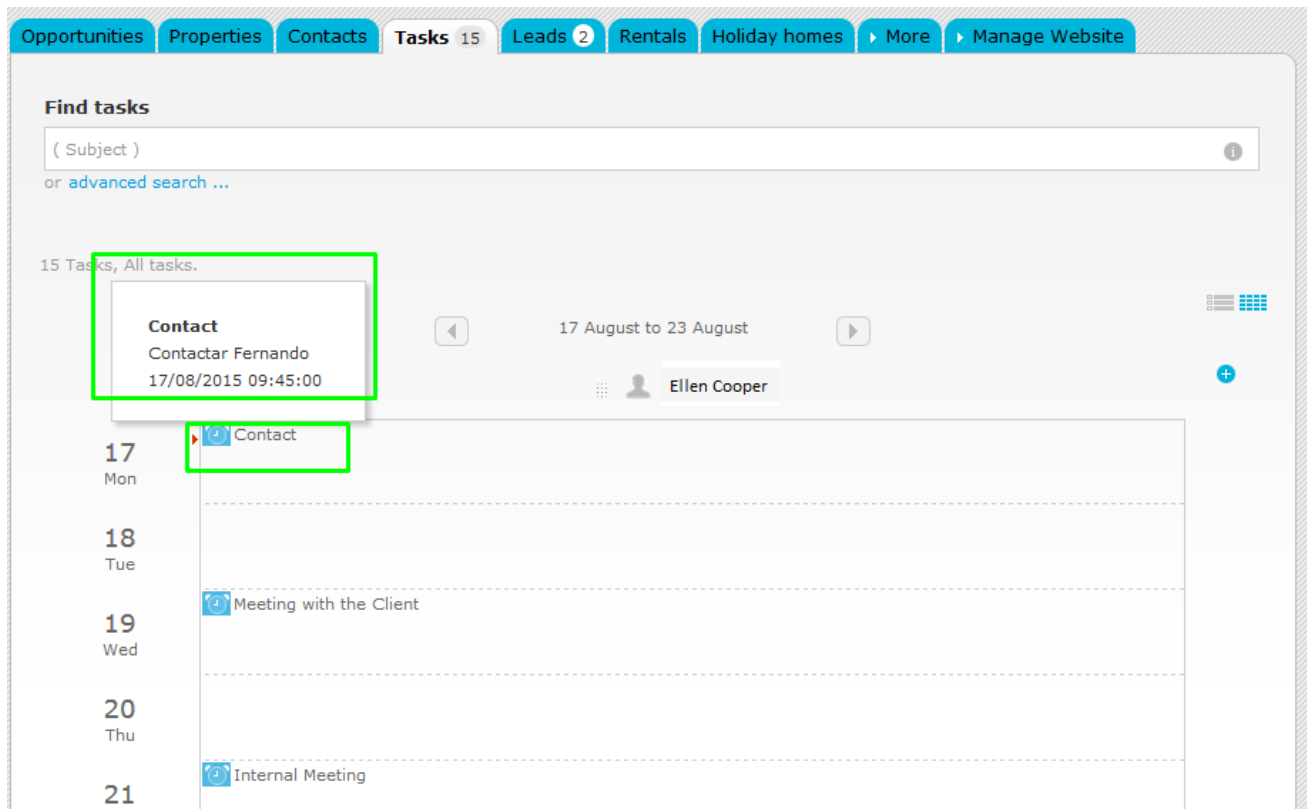
4 – Daily tasks



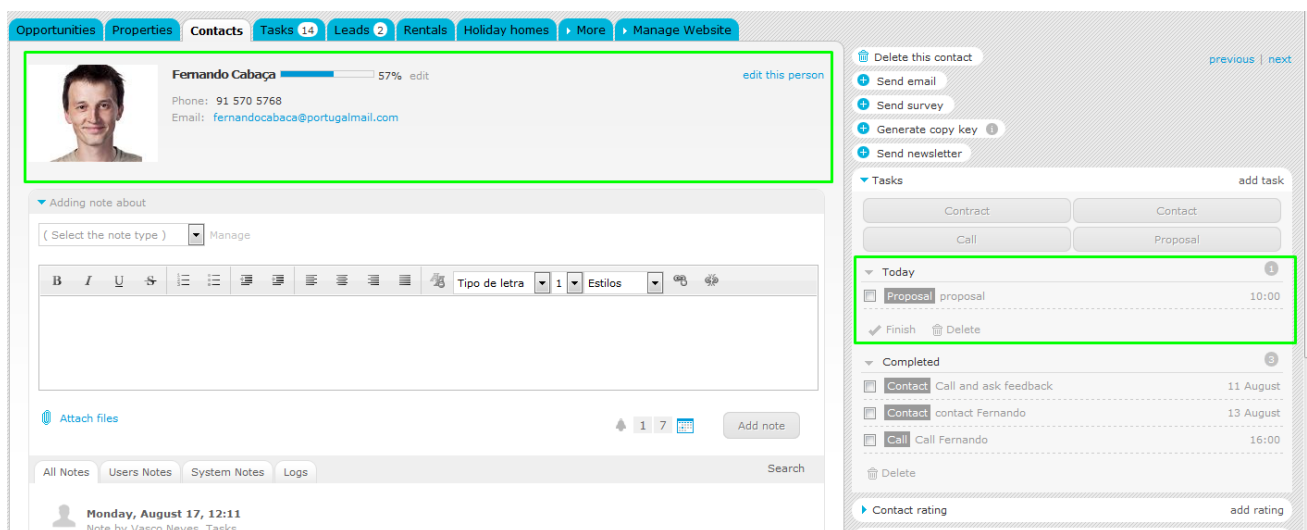
The screenshot displays the eGO interface with the 'Tasks' tab selected. The interface includes a navigation bar at the top with tabs for Opportunities, Properties, Contacts, Tasks (15), Leads (2), Rentals, Holiday homes, More, and Manage Website. Below the navigation bar is a 'Find tasks' section with a search input field labeled '(Subject)' and a link to 'advanced search ...'. The main area shows a weekly view for the week of 17 August to 23 August, associated with Ellen Cooper. A summary box indicates '15 Tasks, All tasks.' The weekly view is presented as a table with columns for days of the week and tasks. The tasks listed are 'Contact' on Monday, 'Meeting with the Client' on Wednesday, and 'Internal Meeting' on Thursday.

Day	Task
17 Mon	Contact
18 Tue	
19 Wed	Meeting with the Client
20 Thu	
21 Fri	Internal Meeting

3. In the weekly view you can only see your tasks for that week. You can click on the task to get more information about it and to be directed to the place where the task was scheduled (contact, property, opportunity, etc.)

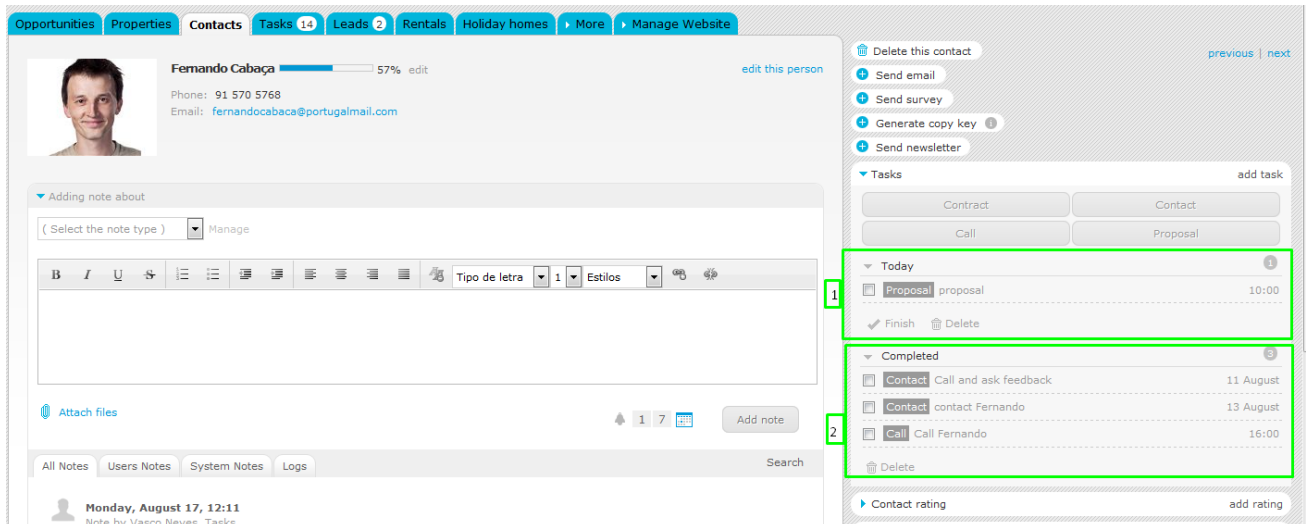


4. After clicking on the task you can complete it or, in case you haven't, you can reschedule it to another day.




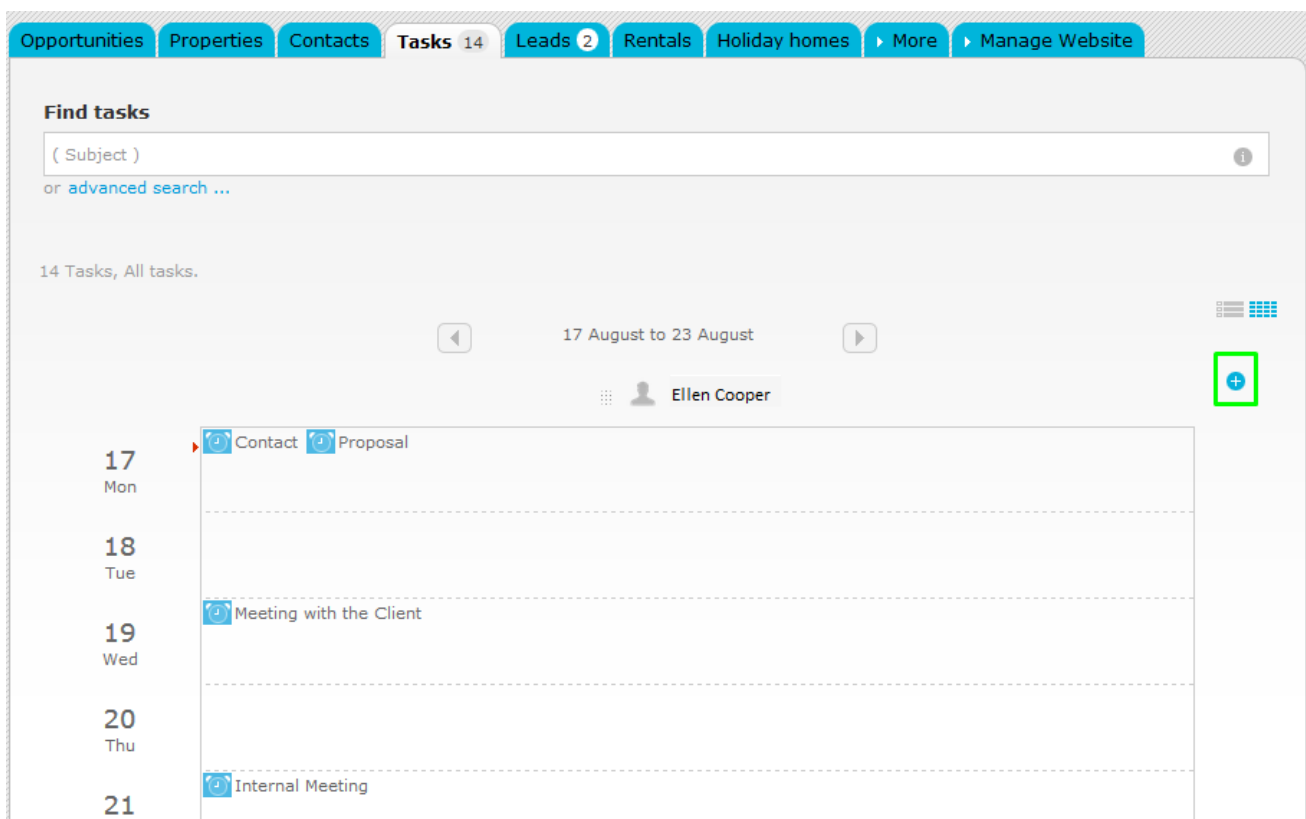
5. In the tasks area you'll see that they are divided in two:

- 1 – The tasks yet to be completed
- 2 – The completed tasks



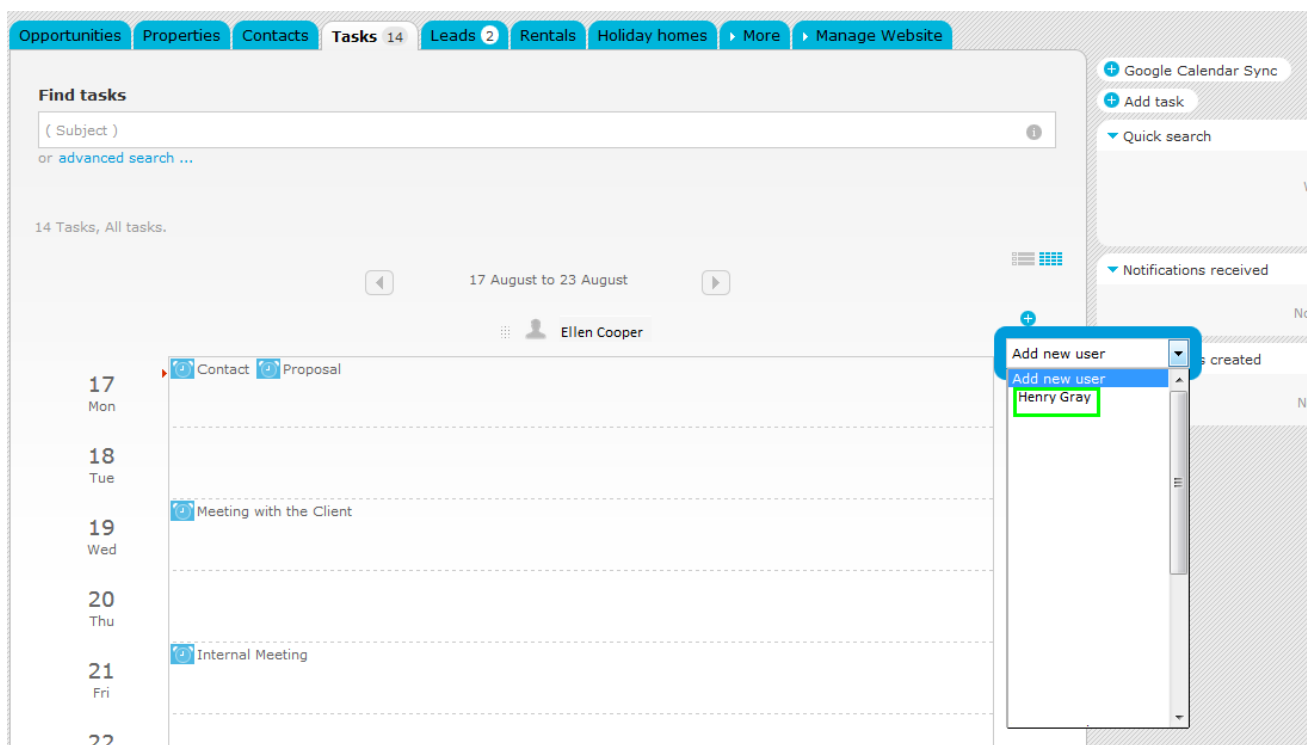
The screenshot shows the CRM interface for a contact named Fernando Cabaça. The top navigation bar includes tabs for Opportunities, Properties, Contacts, Tasks (14), Leads (2), Rentals, Holiday homes, More, and Manage Website. The contact profile shows a photo, name, phone number (91 570 5768), and email (fernandocabaca@portugalmail.com). Below the profile is a section for adding notes, with a dropdown for note type and a rich text editor. To the right, there is a list of tasks. The tasks are divided into two sections: 'Today' and 'Completed'. The 'Today' section contains one task: 'Proposal proposal' at 10:00. The 'Completed' section contains three tasks: 'Call and ask feedback' on 11 August, 'contact Fernando' on 13 August, and 'Call Fernando' at 16:00. A green box highlights the 'Today' section (labeled 1) and the 'Completed' section (labeled 2).

6. If you want, you can also add tasks from other users to your weekly view (you need to have permissions to see all the tasks). [Click here to know how to apply permissions](#). To do so, just add another user by clicking the  icon.

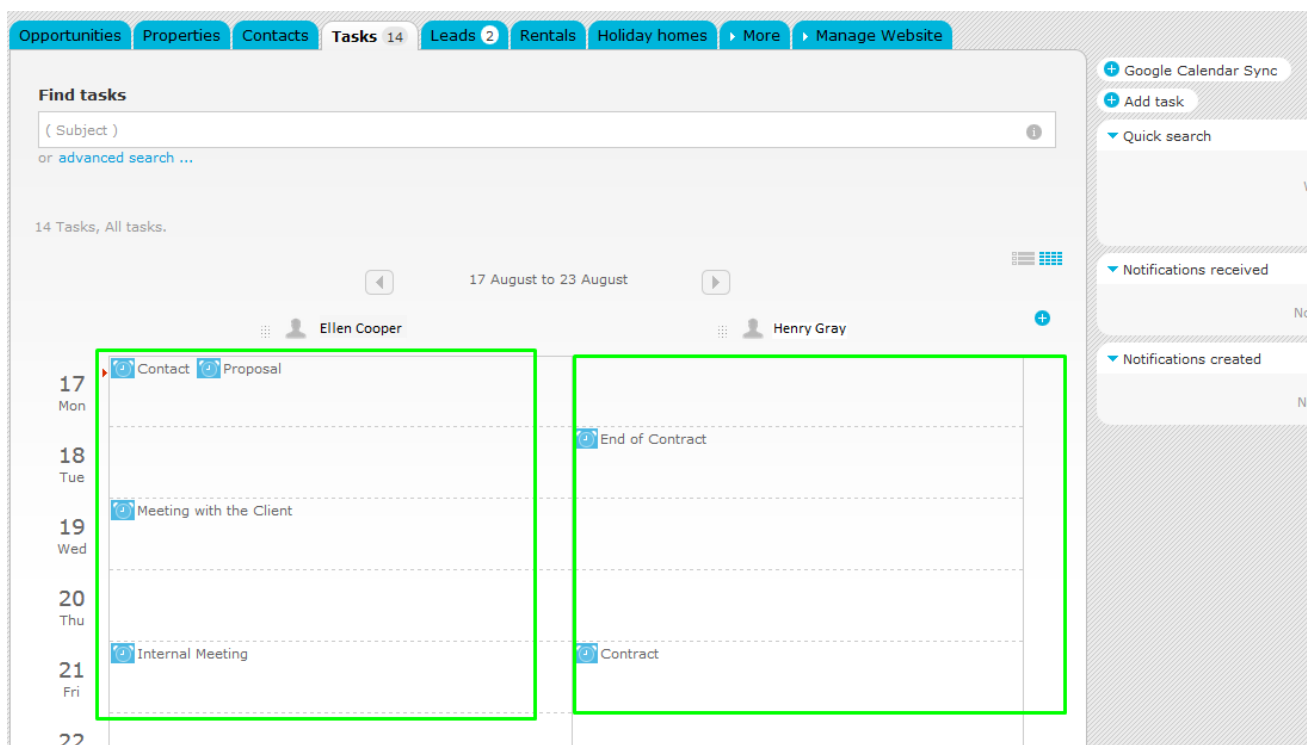


The screenshot shows the CRM interface for a weekly task view. The top navigation bar includes tabs for Opportunities, Properties, Contacts, Tasks (14), Leads (2), Rentals, Holiday homes, More, and Manage Website. The 'Find tasks' section has a search bar with '(Subject)' and a link to 'advanced search ...'. Below the search bar, it says '14 Tasks, All tasks.' and shows a calendar view for the week of 17 August to 23 August. The tasks are listed for each day: Monday (Contact, Proposal), Wednesday (Meeting with the Client), and Thursday (Internal Meeting). A green box highlights the plus icon in the top right corner.

7. After that, you'll get a list of eGO users and you can just select the one you want.

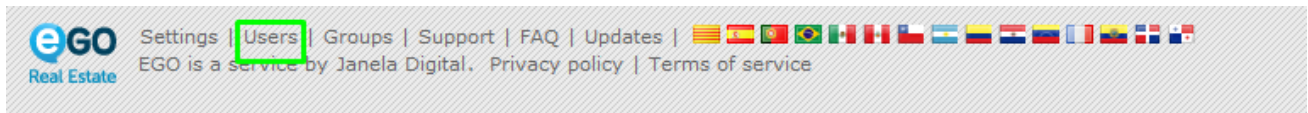


7.1 You'll get this look where you can verify that both your (**Ellen Cooper**) and the other user's (**Henry Gray**) tasks are being shown.

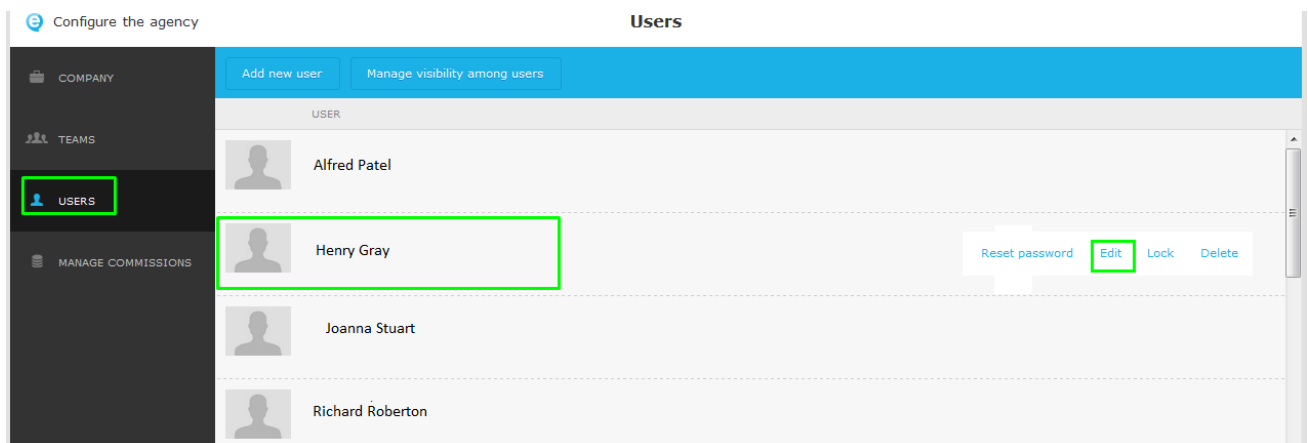


To make this management easier, you can receive a daily notification with the tasks scheduled for that day. This way, you'll receive an email with the number of tasks scheduled. To do this, you just need to select that option in the user's notification section.

8. Click **'Users'** on the footer.



9. Select you user and click **'Edit'**,



10. Scroll down to the notifications section and tick the '**Receive email notifications of tasks**' option;

Note: By default, the notifications will be sent to your login email, if you want to change that, please enter another email in the '**if you want to receive notifications in another email that is not the login click to choose**' box. After that click on '**Save this user**'.

Configure the agency

Users

COMPANY

TEAMS

USERS

MANAGE COMMISSIONS

Website

Notifications

- ☒ Receive email notifications of tasks
- ☐ Deliver leads/opportunities on your own responsibility
- ☐ Receive email notifications of leads/opportunities
- ☒ Receive daily balance of tickets by email
- ☐ Receive email notifications of new available property
- ☐ Receive notification of availability changes "In Review" property by email
- ☐ Receive daily balance of blocked newsletter
- ☒ Receive email notifications of tickets
- ☒ I also wish to be notified when receiving a reply/forward to tickets
- ☒ Receive daily balance of tasks by email
- ☐ Deliver new proposals on your own responsibility
- ☐ Receive daily balance of internet leads
- ☐ Receive new email messages
- ☐ Receive email notifications of property availability updates (broker, salesman)
- ☐ Receive notification of availability changes "Available" property by email
- ☐ Receive email notifications of proposal status changed

IF YOU WANT TO RECEIVE NOTIFICATIONS IN ANOTHER EMAIL THAT IS NOT THE LOGIN_CLICK TO CHOOSE

Cancel Save this user

Check other complementary information:

- [How to schedule a task in an Opportunity?](#)
- [How to apply notifications?](#)

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

Questions: support@egorealestate.com