# Tasks & Appointments in the CRM

# What is a Task? How to Manage Tasks in the CRM?

## What Is a Task?

Tasks are used to schedule reminders for activities that need to be completed by the realtor.

They help ensure important lead-related actions such as follow-ups, calls, emails, open houses, thank-you messages, and other activities are completed on time.

Tasks can be created and managed from a lead profile or through the Profile tab.

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## Create a Task from a Lead Profile

1. Navigate to **CRM**.
2. Open the desired lead profile.
3. Click on the **Plus** button at the bottom right.
4. Select **Add Task**.

The Add Task window will appear.

5. Enter the task title.
6. Select the task type.

Available task types may include:

- Follow Up
- Call
- Email
- Open House
- Thank You
- Other available task types

7. Select the task date.
8. Select the task time.

### Set a Reminder

You can configure a reminder for the task.

Examples include:

- 10 minutes before
- 30 minutes before
- 1 day before
- 1 week before
- 5 weeks before

The reminder will be triggered relative to the scheduled task date and time.

### Repeat the Task

If the task should occur repeatedly, enable **Repeat Event**.

You can customize the repeat settings by selecting a recurrence pattern such as:

- Daily
- Weekly
- Monthly
- Yearly

You can also specify when the recurring task should end.

Available options include:

- Never End
- End after a specified number of occurrences
- End on a specific date

9. Click **Save**.

The task will be created successfully.

The task will also be displayed on the Calendar on the scheduled date.

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## Manage Tasks from a Lead Profile

1. Navigate to **CRM**.
2. Open the desired lead profile.
3. Scroll to the **Tasks** section.

The task status will indicate whether the task is **Pending** or **Completed**.

### Create a Task from the Tasks Section

1. Click on the **Plus** button.
2. Enter the task title.
3. Select the task type.
4. Select the date and time.

5. Configure the reminder settings.
6. Configure the repeat settings if required.
7. Click **Save**.

The task will be created successfully.

## Edit a Task

1. Locate the task you want to modify.
2. Click **Edit**.
3. Make the required changes.
4. Click **Save**.

The task will be updated successfully.

## Delete a Task

1. Locate the task you want to remove.
2. Click **Delete**.
3. Confirm the deletion.

The task will be deleted successfully.

You have successfully learned how to create and manage tasks in AgentRoof CRM.

# What is an Appointment? How Manage Appointments in the CRM?

## What Is an Appointment?

Appointments are used to schedule meetings, events, and other planned activities with leads.

They help realtors organize their schedule, keep track of upcoming engagements, and receive reminders for important meetings and events.

Appointments are managed from the lead profile.

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## View Appointments

1. Navigate to **CRM**.
2. Open the desired lead profile.
3. Scroll to the **Appointments** section.

The Appointments section displays all appointments associated with the lead.

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## Create an Appointment

1. Navigate to **CRM**.
2. Open the desired lead profile.
3. Scroll to the **Appointments** section.
4. Click The **Plus** button.

The Add Appointment window will appear.

5. Enter the appointment title.
6. Enter a description for the appointment.
7. Specify the appointment location.
8. Select the appointment date.
9. Select the start time.
10. Select the end time.
11. Configure the reminder settings.
12. Click **Save**.

The appointment will be created successfully.

The appointment will also be displayed on the Calendar on the scheduled date and time.

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## Edit an Appointment

1. Locate the appointment you want to modify.
2. Click **Edit**.
3. Make the required changes.
4. Click **Save**.

The appointment will be updated successfully.

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## Delete an Appointment

1. Locate the appointment you want to remove.
2. Click **Delete**.
3. Confirm the deletion.

The appointment will be deleted successfully.

You have successfully learned how to create and manage appointments in AgentRoof CRM.

# CRM Calendar - Manage Tasks & Appointments from the Calendar

## What Is the Calendar?

The Calendar provides a centralized view of all scheduled tasks and appointments.

It allows you to create, view, and manage tasks and appointments based on their scheduled date and time.

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## Calendar Views

Navigate to **Calendar**.

The Calendar provides three viewing options:

- Month View
- Week View
- Day View

Day View displays tasks and appointments based on their scheduled time during a specific day.

Week View displays tasks and appointments scheduled throughout the week.

Month View displays all scheduled tasks and appointments within the selected month.

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## Create a Task

1. Click **Add Task**.

The Add Task window will appear.

2. Select the lead.
3. Enter the task title.
4. Select the task type.
5. Select the task date and time.
6. Configure the reminder settings.
7. Enable **Repeat Event** if required.

8. Select the repeat schedule, such as Daily, Weekly, Monthly, or Yearly.
9. Specify when the recurring task should end.
10. Click **Save**.

The task will be created successfully and displayed on the Calendar.

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## Create an Appointment

1. Click **Add Appointment**.

The Add Appointment window will appear.

2. Select the lead.
3. Enter the appointment title.
4. Enter a description.
5. Specify the location.
6. Select the appointment date.
7. Select the start time.
8. Select the end time.
9. Configure the reminder settings.
10. Click **Save**.

The appointment will be created successfully and displayed on the Calendar.

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## View Calendar Items

Locate the task or appointment using its scheduled date and time.

Click the task or appointment.

The details will be displayed.

You can view information such as:

- Title
- Description
- Date and Time
- Status

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## Manage Tasks

Open the desired task from the Calendar.

You can perform the following actions:

- Mark as Complete
- Edit
- Delete

### Mark as Complete

Click **Mark as Complete**.

The task status will be updated to Completed.

**Note:** The **Mark as Complete** option is only available for overdue tasks. Tasks that have not yet reached their scheduled date and time cannot be marked as complete.

### Edit a Task

Click **Edit**.

Make the required changes.

Click **Save**.

**Note:** If the date or time of an existing task is modified, the updated task will be treated as a new scheduled task and will appear on the Calendar based on the newly selected date and time.

### Delete a Task

Click **Delete**.

Confirm the deletion.

The task will be removed successfully.

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## Manage Appointments

Open the desired appointment from the Calendar.

You can perform the following actions:

- Edit
- Delete

Appointments do not include a Mark as Complete option.

### Edit an Appointment

Click **Edit**.

Make the required changes.

Click **Save**.

## Delete an Appointment

Click **Delete**.

Confirm the deletion.

The appointment will be removed successfully.

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You have successfully learned how to use the Calendar in AgentRoof CRM.