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.

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.

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.

Revision #7
Created 2026-06-15 06:58:45 UTC by AgentRoof
Updated 2026-06-19 09:18:02 UTC by AgentRoof