

1) Navigate to your **profile picture > Settings > Realtor Tasks**

2) Upload the **Buyer Task** List template by clicking **Bulk Upload** and upload the **Hustle-Humbly-template–Agent-BUYER.csv file**

3) Upload the **Seller Task** List template by clicking **Bulk Upload** and upload the **Hustle-Humbly-template–Agent-SELLER.csv file**

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AGENT TASKS

Template tasks for each phase.

[Reset to Real Time Defaults](#)

You can update the different tasks for each phase below. To update Phase titles, navigate to [Settings > Timeline](#).

Any changes made to task lists here will not be reflected in current listings. Changes will only be applied to new listings.

Agent Buyer Tasks **Bulk Upload** **Agent Seller Tasks** **Bulk Upload**

Listing Phase

No tasks set for this phase

[Add New Task +](#)

Pending / Option Phase

- Information About Brokerage Services
- Buyer's Representation Agreement
- Pre-Approval Letter from Lender
- Executed Contract

Listing Phase

- Verify Ownership -Tax Roll of Property / accessor
- Research subject property - Previous listing
- Send "Pre-listing" email
- Schedule listing appointment / staging consultation
- Collect required disclosures
- Collect HOA documents if applicable
- Collect mortgage pay off / insurance declaration pages
- Verify square footage / MLS input (previous appraisal from seller or measure)
- Final walkthrough before photos- get extra key

[Quick Tour](#) [Feedback](#)