



- 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

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

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.

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 / insurace declaration pages

Verify square footage / MLS input (previous appraisal from seller or measure)

Final walkthrough before photos- get extra key

Quick Tour

Feedback