

My Calander

Overview

My Calendar gives you a visual timeline of your scheduled lead actions — upcoming tasks, follow-ups, and any delays — organized by date.

Calendar Tabs

The calendar has three tabs:

Tab	Description
Leads	Shows scheduled next actions for your assigned leads.
Tasks	Shows any tasks assigned to you across the system.
Broker	Shows broker-related activities. This tab only appears if you have activity in the Brokerage Module — if you have no broker activity, it will not show up.

The screenshot displays the 'My Calendar' interface. At the top right, there is a search bar labeled 'Leads Search...' with a magnifying glass icon. Below this is a teal header bar with the word 'Filters' and an upward arrow. Underneath the header, there are three tabs: 'LEADS', 'TASKS', and 'BROKER', with 'LEADS' being the active tab. The main calendar area shows the month of 'June 2026' with navigation arrows and a 'today' button. The calendar grid has columns for days of the week (Sun to Sat) and rows for dates. Two events are visible: a red event on Wednesday, June 10, titled 'The Old Data - Pending' with a sub-item 'The New 2 - Following', and a blue event on Friday, June 15, titled '1-10p - Linnachade'.

What You Can See

- **Upcoming actions** — lead follow-ups and tasks scheduled for future dates.
 - **Past actions** — what was scheduled previously, including any overdue items.
 - **Delayed leads** — leads where the next action date has passed without being completed.
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How to Use It

1. Go to **Sales Module** → **My Calendar**.
 2. Browse by month, week, or day to see what's scheduled.
 3. Click on any item to go directly to that lead.
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Key Things to Know

- The calendar is based on the **Next Action Date** set on each lead.
 - If a lead has no next action date set, it will **not appear** in the calendar.
 - Use the calendar as a daily planning tool to prioritize which leads to contact.
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Created 2026-06-24 11:35:38 UTC by Admin
Updated 2026-06-28 07:57:34 UTC by Admin