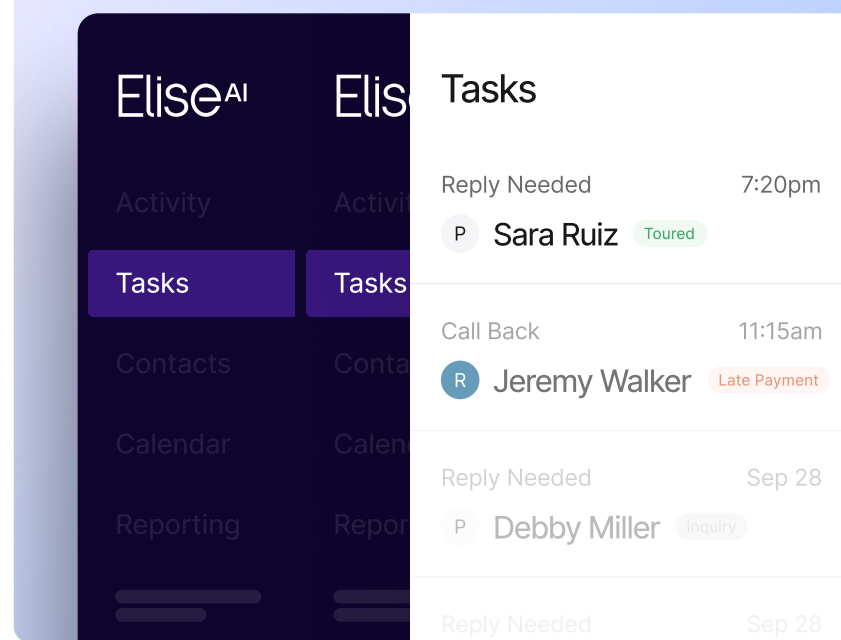


Tasks in EliseCRM

Help Your AI Stay on Task



When your AI needs help responding to a prospect or resident, it will hand off the conversation by creating a task for you in the EliseCRM Task tab. Respond to tasks quickly so that prospects and residents get the information they need, and so your AI can continue to learn from your responses.



Navigate to the Task tab
in EliseCRM



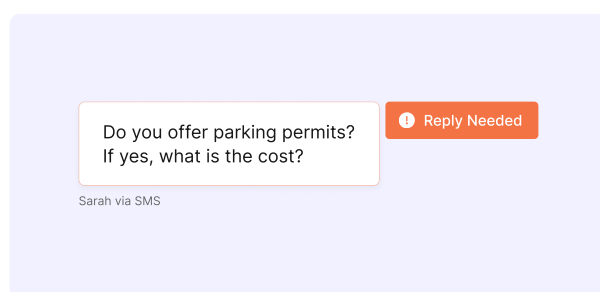
Open a task and review the
handed-off question



Guest card will open for
additional context

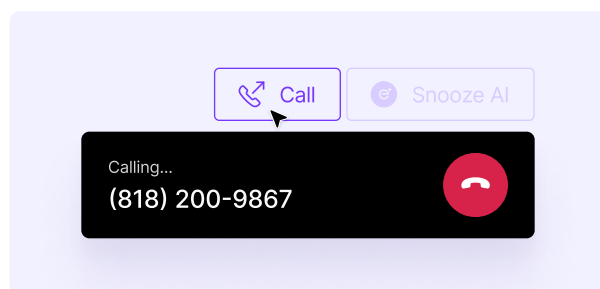


Respond directly
in EliseCRM



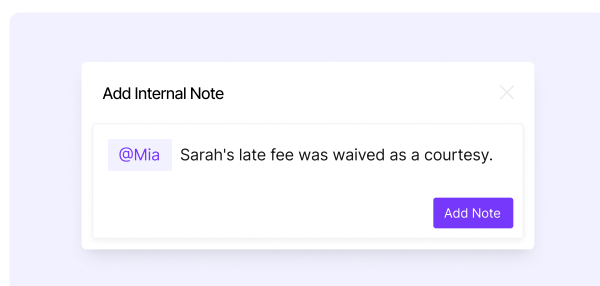
Reply Needed Tasks

Respond to the hand-off directly in the chat. Your reply will be sent in the same conversation thread. The task will be removed from your queue when completed, and your AI will continue the conversation with the prospect or resident.



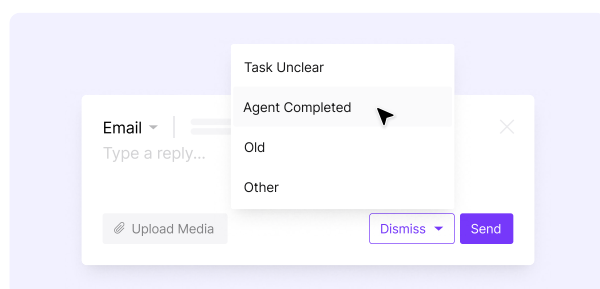
Call Back Tasks

Call the resident using the Call button at the top of the Task page. A recording will be saved in the conversation history. Add an internal note about what was discussed, and dismiss the task. Your AI will continue the conversation from there.



Internal Notes and Reminders

Use internal notes to share additional information with your team. Notes will be saved in the conversation history, but not visible to residents or prospects. You can also tag team members for visibility, and add reminders to revisit a task later



Dismissing Tasks

Only dismiss a task if it has been resolved offline - for example, if a resident stops by the office and you solve the issue in person. As a best practice, include an internal note detailing how the task was resolved.