

# Configuring the Activity List and How to use the Activity list



This guide provides clear, step-by-step instructions for accessing and utilising the Lettings or Sales Dashboard Activity lists effectively, ensuring users can navigate the platform with ease. Also an example of how the Activity list can be used.

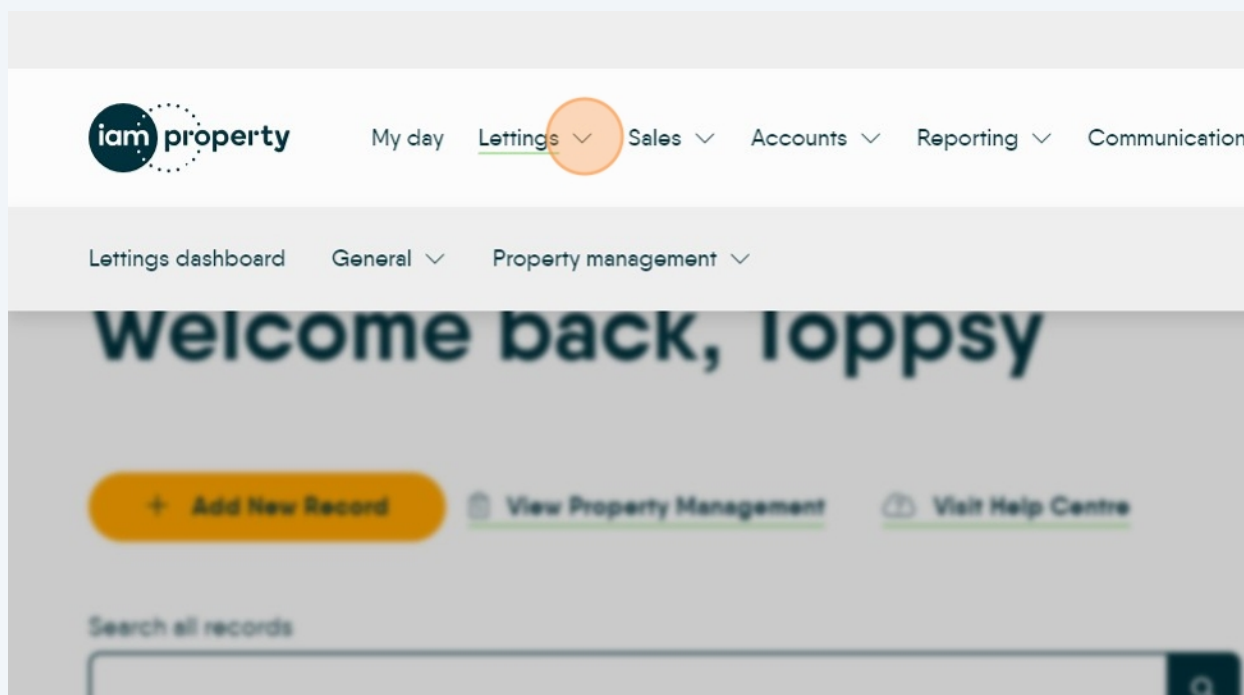
By following the outlined steps, users will be able to update and save changes efficiently, enhancing their experience and productivity within the system.

- 1 Navigate to <https://crm.iamproperty.com/Dashboards/Lettings>

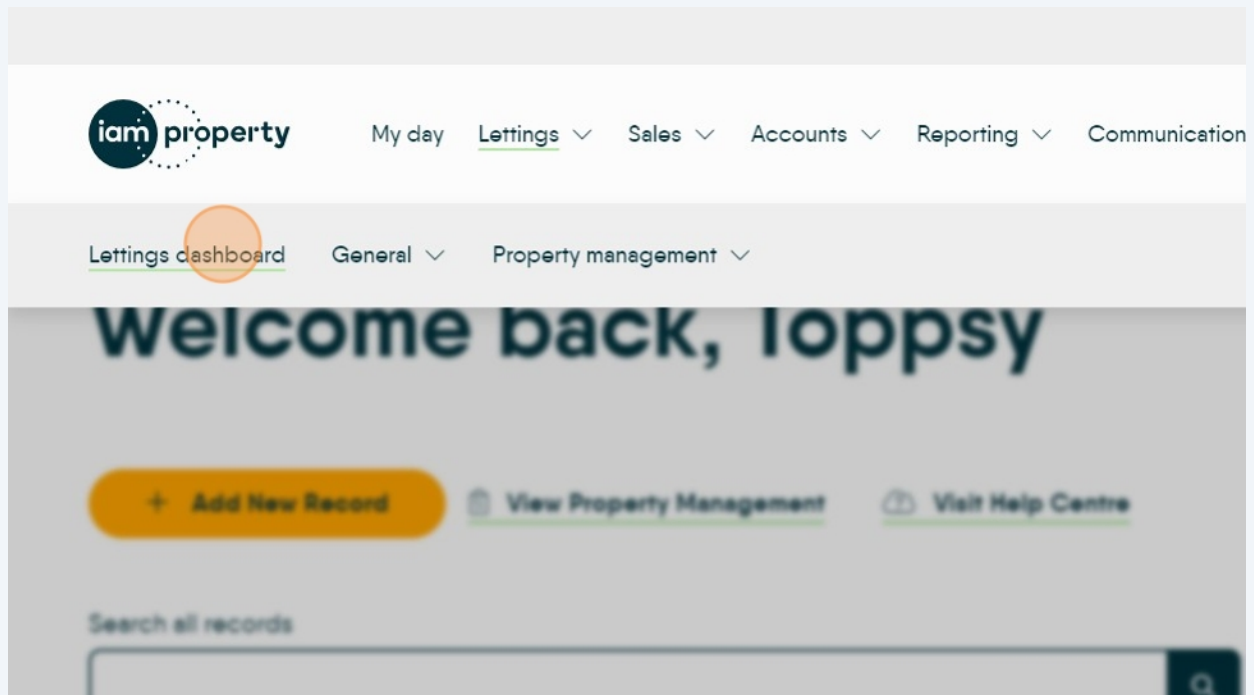


Both the Sales and Lettings Activity Lists work the same way, different types of information are shown, but they work and are configured the same way.

- 2 Click "Lettings" or "Sales"

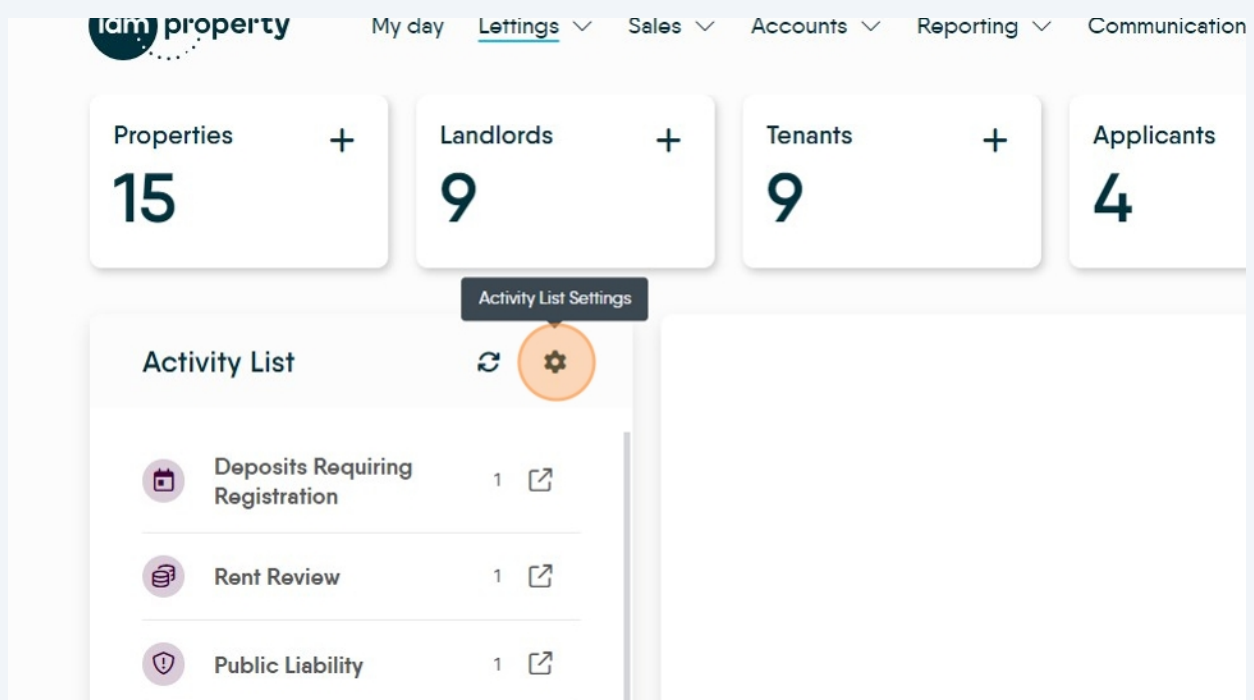


- 3 Click "Lettings dashboard" or "Sales Dashboard"



- 4 Once the Activity List appears you will see a list of items that are due, or overdue to be dealt with. These have come from a property or person record and are created by a date set against an activity e.g. a rent overdue by X many days.

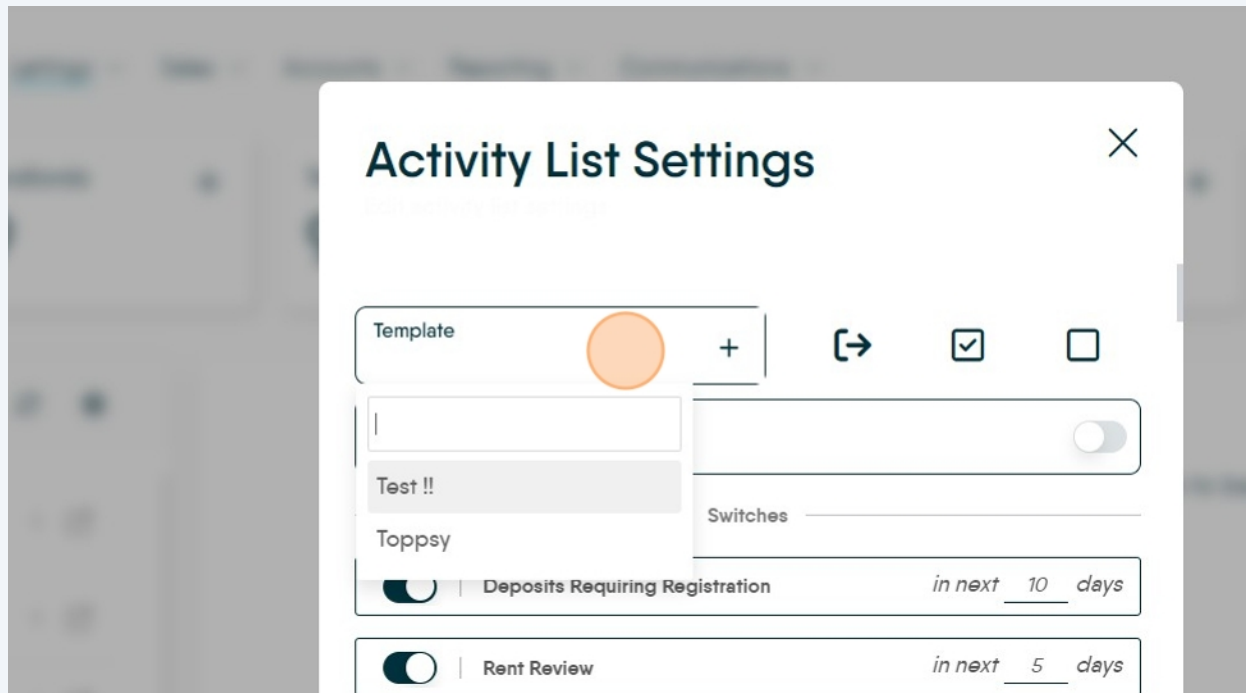
The date range, controlling the information displayed in the list, can be edited from the settings option. To do this we can go into the settings cog and change the settings.



## Editing the Activity List

- 5 This brings up a screen where we can edit the date range and switch off options.

We can add a template if various users have different activities that they look after. To add the template follow this.



- 6 The next icon is Deselect all, this allows you to deselect all the currently selected options and select only the ones that you require & 'select all' allows you to do the reverse.  
Click here.

## Activity List Settings

edit activity list settings

▼ +

↔

☒

☐

User 

Deselect All

Switches

☐

 | Deposits Requiring Registration | in next 10 days

☐

 | Rent Review | in next 5 days

## Activity List Settings

edit activity list settings

Template ▼ +

↔

☒

☐

Filter by User 

Select All ☐

Switches

☐

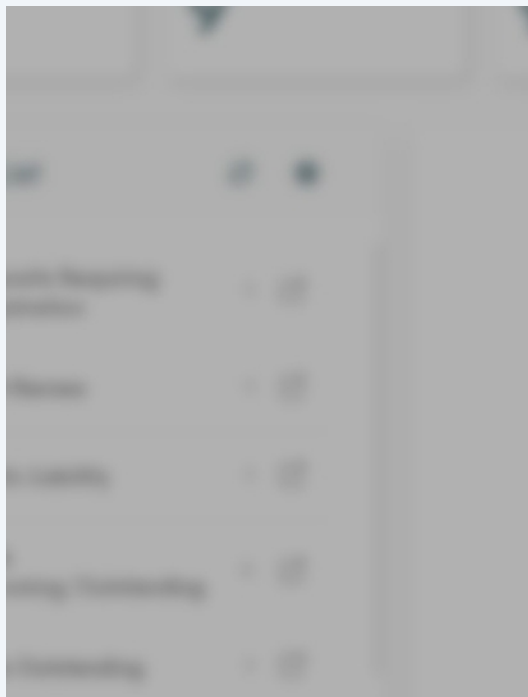
 | Deposits Requiring Registration | in next 10 days

☐

 | Rent Review | in next 5 days

7

To the left of each activity is a button where you can select and deselect items individually.  
Click here.



Template

▼

+

↗

☑

Filter by User

Switches

☒

Deposits Requiring Registration

in next

☐

Rent Review

in next

☐

Public Liability

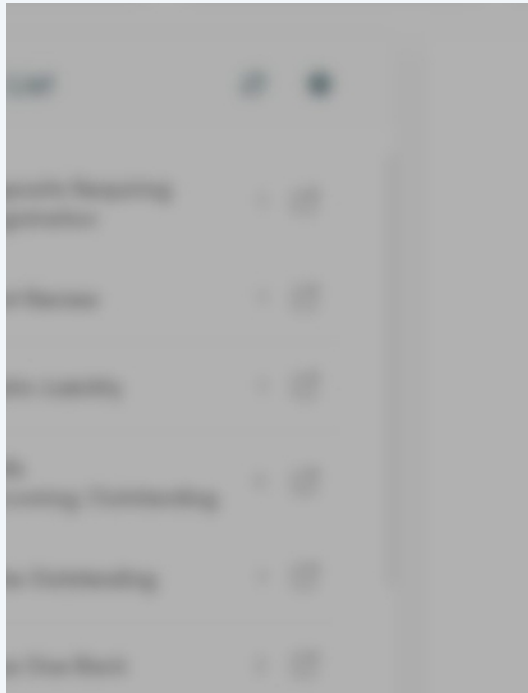
in next

☐

Hmo Licence Expiry

in next

Cancel



Template

▼

+

↗

☑

Filter by User

Switches

☐

Deposits Requiring Registration

in next

☒

Rent Review

in next

☐

Public Liability

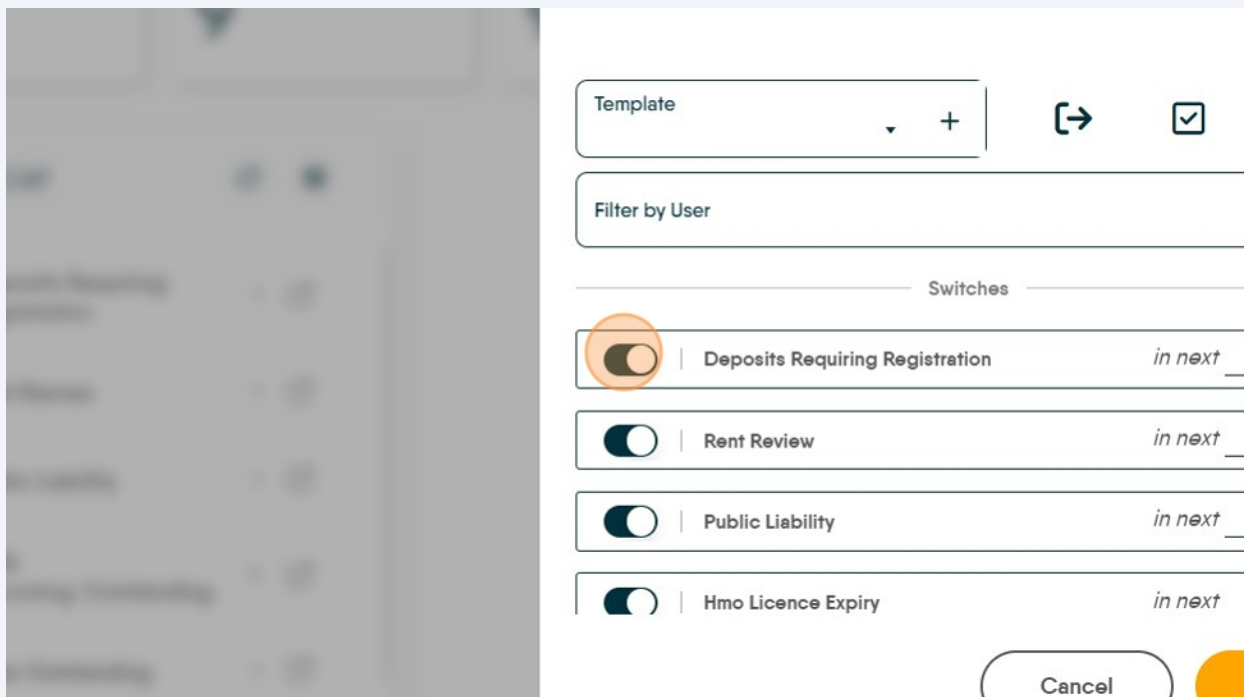
in next

☐

Hmo Licence Expiry

in next

Cancel



Template ▼ + ↔ ☒

Filter by User ⋮

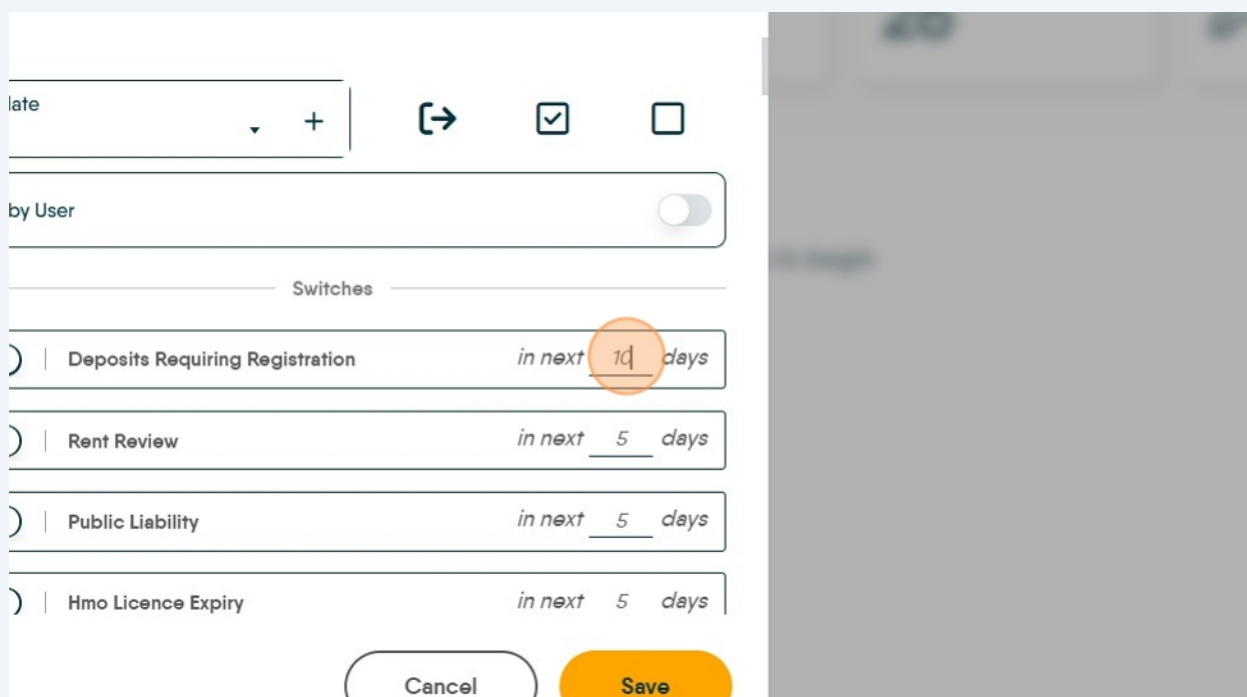
Switches

- ☒ Deposits Requiring Registration *in next* ⋮
- ☐ Rent Review *in next* ⋮
- ☐ Public Liability *in next* ⋮
- ☐ Hmo Licence Expiry *in next* ⋮

Cancel ⋮

8

To the right of the activity is the number of days notice that you receive of an activity. This can be set from 1-999.



late ▼ + ↔ ☒ ☐

by User ⋮

Switches

- ☒ Deposits Requiring Registration *in next* 10 days ⋮
- ☐ Rent Review *in next* 5 days ⋮
- ☐ Public Liability *in next* 5 days ⋮
- ☐ Hmo Licence Expiry *in next* 5 days ⋮

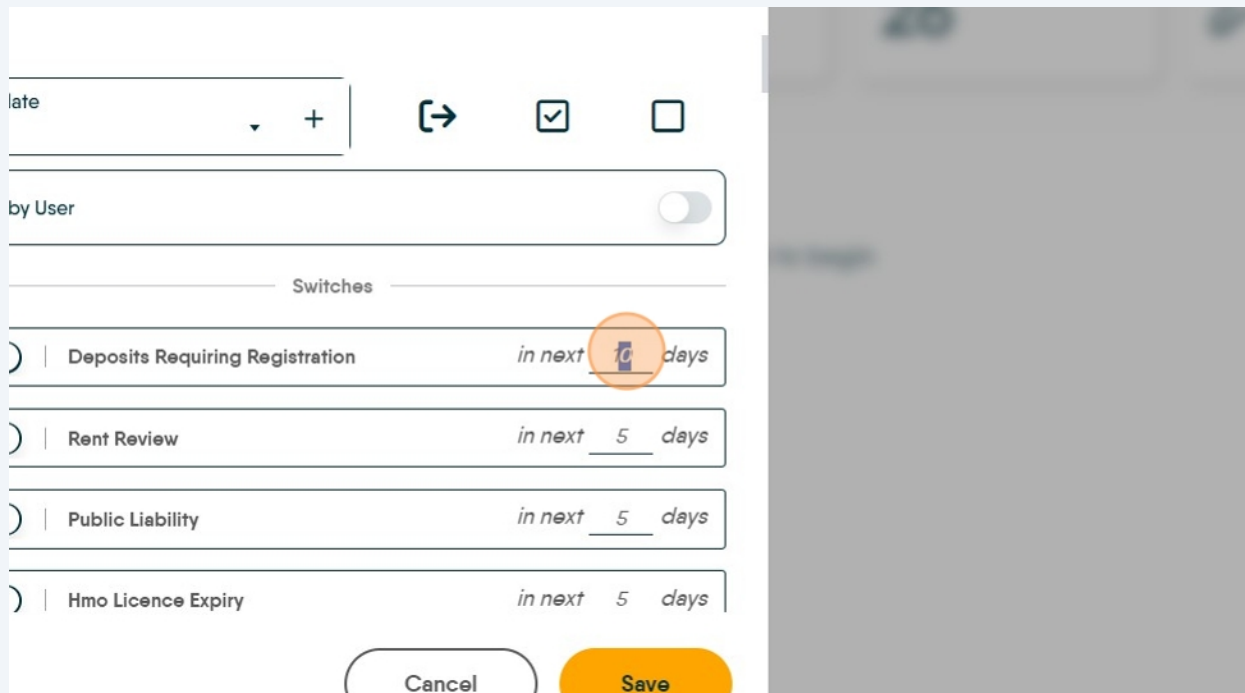
Cancel Save



Alert! Be aware there are options in this list e.g. 'in the next' 'from the last' 'in last' 'older than' 'by' 'in' these all act differently with days so a blanket number of days set may not be appropriate. For example 1 day for 'applicant not contacted' would mean an applicant contacted today will re appear on the list tomorrow.

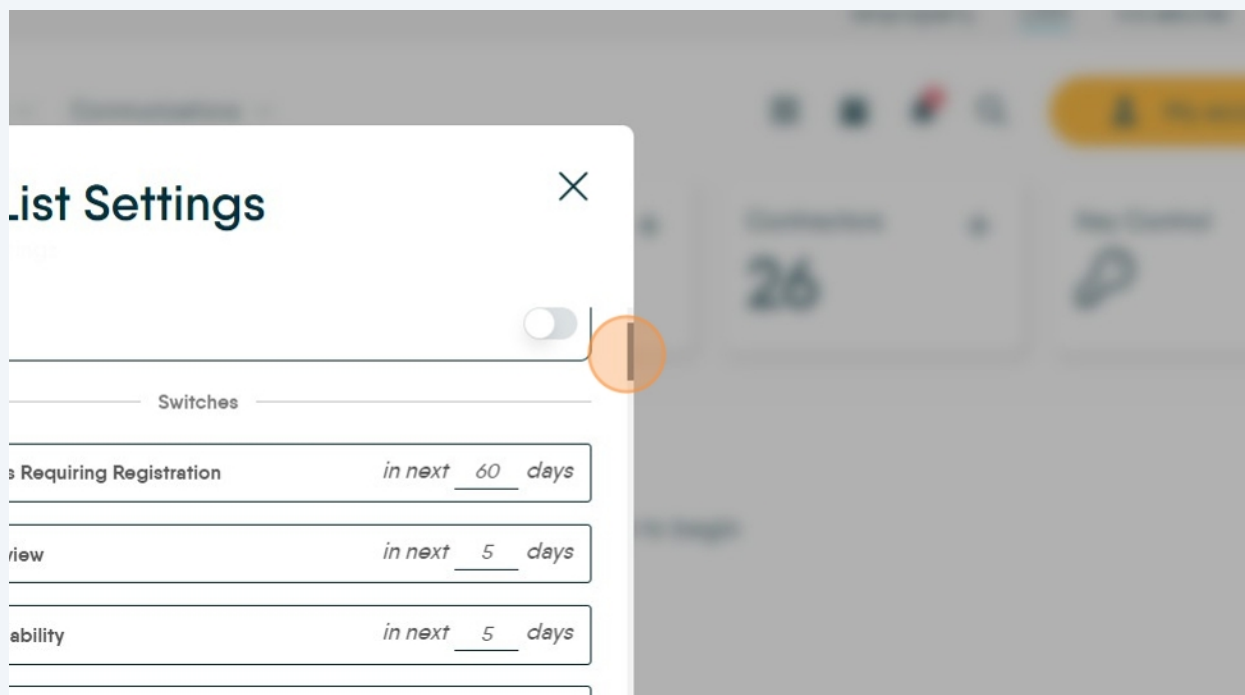
9

Click this field.  
Type the number of days you want to use



A screenshot of a settings form. At the top, there is a dropdown menu with the word "late" and a plus sign. To its right are three icons: a square with a right-pointing arrow, a checked checkbox, and an unchecked checkbox. Below these is a toggle switch labeled "by User". Underneath is a section titled "Switches". There are four rows, each with a circular icon on the left, a text label, and a text field. The first row has the label "Deposits Requiring Registration" and the text field contains "10", which is highlighted with an orange circle. The second row has the label "Rent Review" and the text field contains "5". The third row has the label "Public Liability" and the text field contains "5". The fourth row has the label "Hmo Licence Expiry" and the text field contains "5". At the bottom of the form are two buttons: "Cancel" and "Save".

Icon	Label	Days
ⓘ	Deposits Requiring Registration	10
ⓘ	Rent Review	5
ⓘ	Public Liability	5
ⓘ	Hmo Licence Expiry	5

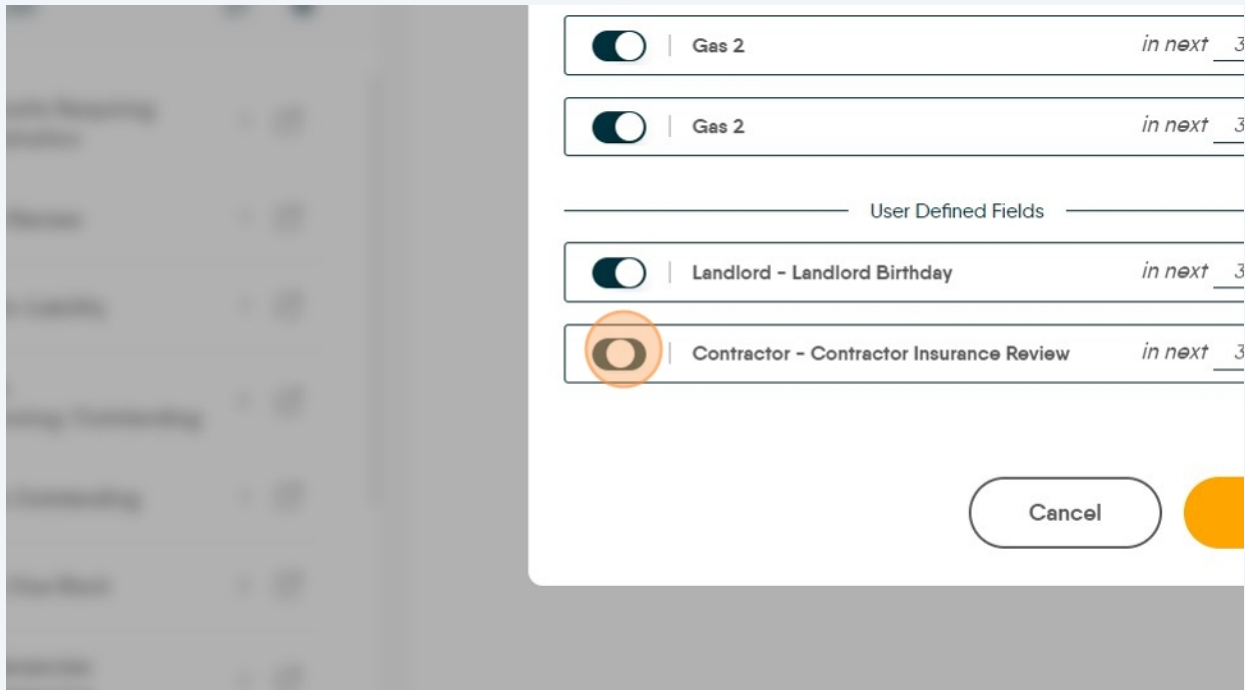


A screenshot of a "List Settings" modal. The modal has a title bar with a close button (X). Below the title bar is a toggle switch. Underneath is a section titled "Switches". There are three rows, each with a text label and a text field. The first row has the label "s Requiring Registration" and the text field contains "60". The second row has the label "riew" and the text field contains "5". The third row has the label "ability" and the text field contains "5". An orange circle highlights the "60" in the first row's text field.

Label	Days
s Requiring Registration	60
riew	5
ability	5

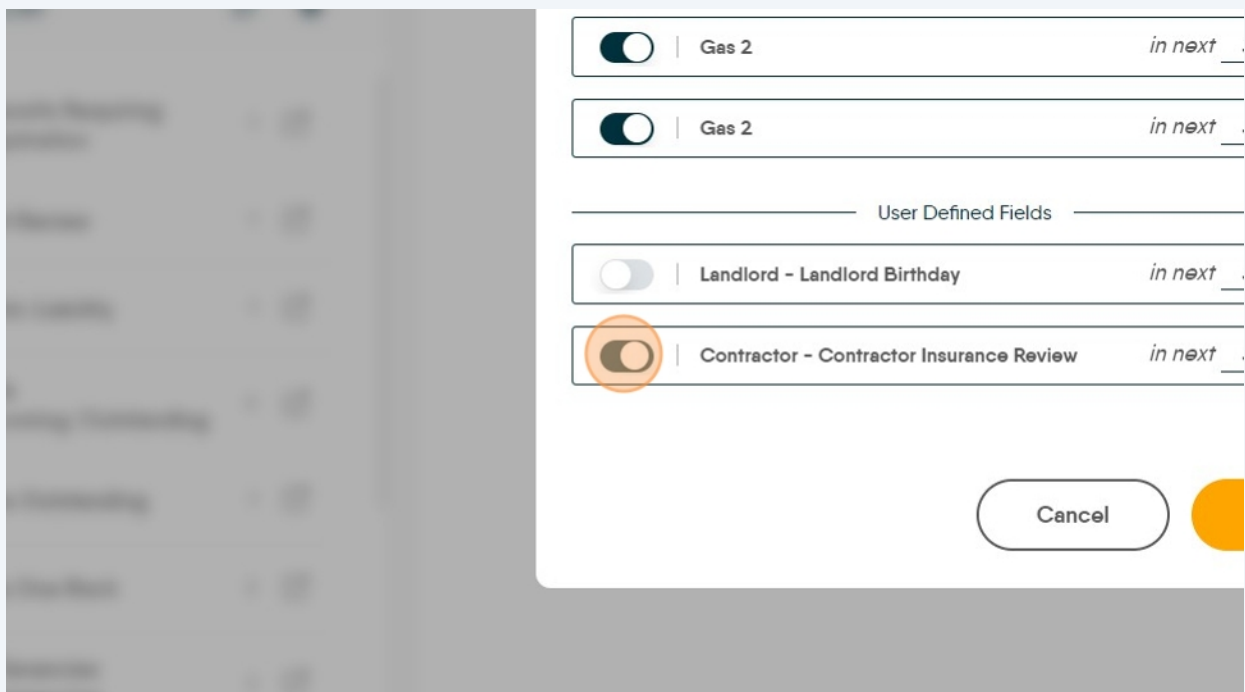
10

At the bottom of the page you can also track UDF's (User Defined Fields) you have created. The requirement is that the UDF has a date as the response and they will show on the activity list, and can be selected and deselected the same as above,



11

Make sure you save the changes. Click "Save"



















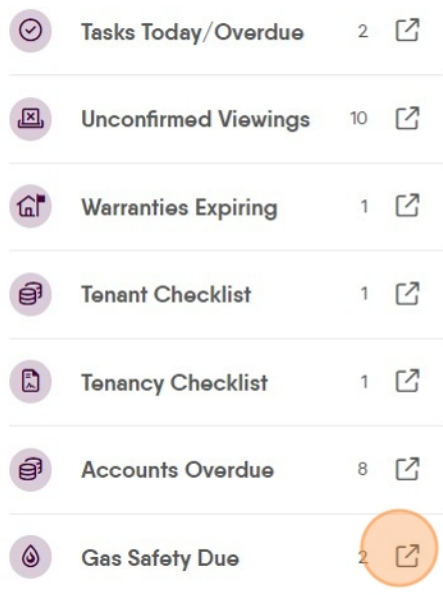
)   Gas 2	in next 30 days
)   Gas 2	in next 30 days
User Defined Fields	
)   Landlord - Landlord Birthday	in next 30 days
)   Contractor - Contractor Insurance Review	in next 30 days















## Using the Activity List

- 12** Once you have carried out all the changes, then return to the Activity List screen

To use the activity list, scroll down to the activity you wish to look at then click in the small box to the right hand side.

	Deposits Requiring Registration	1	
	Rent Review	1	
	Public Liability	1	
	Calls Upcoming/Outstanding	5	
	Jobs Outstanding	1	
	Keys Due Back	2	
	Pb Tenancies Commencing	3	



	Tasks Today/Overdue	2	
	Unconfirmed Viewings	10	
	Warranties Expiring	1	
	Tenant Checklist	1	
	Tenancy Checklist	1	
	Accounts Overdue	8	
	Gas Safety Due	2	



Tip! To show how the Activity List can be used, we will use Gas Safety as an example and run through the process of sending notifications and updating the due date from within the activity list.

13

When you have selected an option in the Activity List the information will show in the right side of the screen.

In this instance we have selected Gas Safety Due. Scroll left and right to view the information provided.

If you now click on the box next to Negotiator, that will highlight all properties or you can select individually.

From there you can either Email or Text with the templates that you have created in the system. This message will be sent to the Landlord to get the Gas Safety checks completed and then sent back to you.

The screenshot displays a software interface for managing property-related tasks. At the top, a dashboard shows counts for various categories: Landlords (9), Tenants (9), Applicants (4), PB Tenants (3), and Contractors (26). Below this is a sidebar with a list of activities, including 'Today/Overdue', 'Confirmed Viewings', 'Properties Expiring', 'Checklist', 'Daily Checklist', and 'Properties Overdue'. The main area shows a 'Gas Safety Due' filter applied, displaying a table with columns for Negotiator, Property, and Landlord. Two rows are visible: Dan Carter and Topsy Turvey. A red circle highlights the checkbox next to the Negotiator column header.

	Negotiator	Property	Landlord
	<input type="checkbox"/> Dan Carter	1 The Old Print Works High Street, Crediton EX17 3LG	Moz Wi
	<input type="checkbox"/> Topsy Turvey	8 Cleveland Court Grosvenor Place, Exeter EX1 2JP	Moz Wi



Tip! Once you have then sent the email/Text off to the landlord and you have a reply back, you can now carry on to the next part.

14

Click the 3 dot menu to see other options. These options can change depending on which activity list you are looking at.

Properties +  
82

Landlords +  
54

Tenants +  
51

Applicants +  
11

PB Tenants +  
12

Contractors +  
28

Key Control

Activity List

- Lettings Property Checklist 7
- Landlord Checklist 7
- Tenant Checklist 1
- Tenancy Checklist 1
- Lettings Applicant Checklist 1
- Accounts Overdue 12
- Gas Safety Due 28

Gas Safety Due

	Negotiator	Property	Landlord
	<input type="checkbox"/>	David-George Morgan	63 Woodland Road, Darlington DL3 7BQ
	<input type="checkbox"/>	David-George Morgan	Flat 89 Alverton Drive, Faverdale, Darlington DL3 0GA
	<input type="checkbox"/>	David-George Morgan	17 Yew Tree Close, Hurworth, Darlington DL2 2HX
	<input type="checkbox"/>	David-George Morgan	1 Spruce Grove, Darlington DL3 8NW
	<input type="checkbox"/>	Training Dave	73 Pelaw Crescent, Chester le Street DH2 2HX
	<input type="checkbox"/>	Training Dave	73 Pelaw Crescent, Chester le Street DH2 2HX
	<input type="checkbox"/>	Training Dave	16 Yew Tree Close, Hurworth, Darlington DL2 2HX
	<input type="checkbox"/>	Training Dave	69 Kingsway, Darlington DL1 3EY

15

Click "Add Call (Landlord)"

Properties +  
82

Landlords +  
54

Tenants +  
51

Applicants +  
11

PB Tenants +  
12

Contractors +  
28

Key Control

Activity List

- Lettings Property Checklist 7
- Landlord Checklist 7
- Tenant Checklist 1
- Tenancy Checklist 1
- Lettings Applicant Checklist 1
- Accounts Overdue 12
- Gas Safety Due 28
- Fixed Wiring (EICR) Due 6

Gas Safety Due

	Negotiator	Property	Landlord
	<input type="checkbox"/>	David-George Morgan	63 Woodland Road, Darlington DL3 7BQ
	<input type="checkbox"/>	David-George Morgan	Flat 89 Alverton Drive, Faverdale, Darlington DL3 0GA
	<input type="checkbox"/>	David-George Morgan	17 Yew Tree Close, Hurworth, Darlington DL2 2HX
	<input type="checkbox"/>	David-George Morgan	1 Spruce Grove, Darlington DL3 8NW
	<input type="checkbox"/>	Training Dave	73 Pelaw Crescent, Chester le Street DH2 2HX
	<input type="checkbox"/>	Training Dave	73 Pelaw Crescent, Chester le Street DH2 2HX
	<input type="checkbox"/>	Training Dave	16 Yew Tree Close, Hurworth, Darlington DL2 2HX
	<input type="checkbox"/>	Training Dave	69 Kingsway, Darlington DL1 3EY
	<input type="checkbox"/>	Training Dave	71 Pelaw Crescent, Chester le Street DH2 2HX

16

This will allow you to either (Add New Call) plan a call you will be making in the future or (Log Call) create a record of a call made to a Landlord.

The screenshot displays the CRM interface. At the top, there are navigation tabs: Notes, Tasks, Calls, Contacts, and Events. Below this is a dashboard with several cards showing counts: Landlords (54), Tenants (51), Applicants (11), and PB Tenants (12). A table titled 'Gas Safety Due' is visible, listing properties and negotiators. A modal window titled 'Add new call' is open, showing options to 'Mark Call as Completed', select a priority (High, Medium, Low), choose a contact, set a date/time (13/02/2025 08:41), set a reminder (No reminder), and enter a description with formatting options (B, I, U, link).

17

Click "Add Journal (Property)" allows us to add a journal entry to the Property Record. The other options in this list View Property and View Landlord will take you to the appropriate record in the CRM.

The screenshot shows the CRM interface with a dashboard at the top displaying counts for various categories: Properties (82), Landlords (54), Tenants (51), Applicants (11), PB Tenants (12), Contractors (28), and Key Control. Below the dashboard is an 'Activity List' on the left and a table titled 'Gas Safety Due' on the right. A dropdown menu is open over the table, showing options: 'Add Call (Landlord)', 'Log Call (Landlord)', 'Add Journal (Property)', 'View Property', and 'View Landlord'. The 'Add Journal (Property)' option is highlighted with an orange circle. The table lists properties, negotiators, and landlords.

18 Click here.

**Add New Journal Entry**

DETAILS ATTACHMENTS RECORDS

Date: 13/02/2025 08:42

Entry Type: Select a Journal entry type

Make Public: ☐

Rich text editor toolbar: B, I, U, A, X, X, S, Bulleted List, Numbered List

## Using the Activity List to record the outcome

19 To get to the property record. Click here.

**Checklist**

- Landlord Checklist 6
- Tenant Checklist 2
- Tenancy Checklist 1
- Gas Safety Due 22
- Fixed Wiring (EICR) Due 5
- Fire Extinguishers Due 2
- Carbon Monoxide 2

	<input type="checkbox"/> Negotiator	Property
⋮	<input type="checkbox"/> David-George Morgan	63 Woodland
⋮	<input type="checkbox"/> David-George Morgan	Flat 89 Alvert
⋮	<input type="checkbox"/> David-George Morgan	1 Spruce Gro
⋮	<input type="checkbox"/> Training Dave	73 Pelaw Cres
⋮	<input type="checkbox"/> Training Dave	73 Pelaw Cres
⋮	<input type="checkbox"/> Training Dave	16 Yew Tree C
⋮	<input type="checkbox"/> Training Dave	71 Pelaw Cres
⋮	<input type="checkbox"/> Training Dave	15 Barrett Ro

## 20 Click "View Property"

The left sidebar contains a list of tasks with icons, names, counts, and external links:

- Landlord Checklist (6)
- Tenant Checklist (2)
- Tenancy Checklist (1)
- Gas Safety Due (22)
- Fixed Wiring (EICR) Due (5)
- Fire Extinguishers Due (2)
- Carbon Monoxide Due (2)

The right table has columns for a checkbox, Negotiator, and Property. A dropdown menu is open over the table, showing the following options:

- Add Call (Landlord)
- Log Call (Landlord)
- Add Journal (Property)
- View Property** (highlighted)
- View Landlord

	Negotiator	Property
⋮	<input type="checkbox"/> David-George Morgan	63 Woodland
⋮	<input type="checkbox"/> David-George Morgan	Flat 89 Alvert
⋮	<input type="checkbox"/> David-George Morgan	1 Spruce Gro
⋮	<input type="checkbox"/> Training Dave	73 Pelaw Cres
	Dave	73 Pelaw Cres
	Dave	16 Yew Tree C
	Dave	71 Pelaw Cres
	Dave	15 Barrett Ro
⋮	<input type="checkbox"/> David-George Morgan	12 Throstlene

## 21 Once in the property record, left hand menu, click on Compliance

The left-hand menu contains the following items:

- Checklist
- Appraisals
- Inspections
- Accounts >
- Compliance** (highlighted)
- Information
- maintenance >
- Payment

The top header displays the following information:

- Lead landlord: Mr Moz Wilkes (L) (with a '1' icon)
- View Landlords button
- Negotiator: Dan Carte

Below the header, there is a Reference: field.



22

This will show the Safety Checks, click on the Gas Safety tile top right 3 dot menu and go to Edit.

The screenshot shows the top navigation bar with 'Lead landlord: Mr Moz Wilkes (L)' and 'View Landlords' button, and 'Lead tenant: Miss Georgia Taylor-Brown' and 'View Tenants' button. Below this is a form with 'Reference:', 'Negotiator: Dan Carter', and 'Branch: Turvey & Co'. The main section is titled 'Safety Checks' and contains two tiles: 'Chimney Sweep' (Landlord 02/10/2024) and 'Gas Safety' (Agent 22/11/2024). The 'Gas Safety' tile has an orange circle around its top-right 3-dot menu, which is open showing 'Edit' and 'Delete' options. There are also '+ Add New' and '+ Add a new type' buttons in the top right of the Safety Checks section.

23

Once the page opens click on completed tab and Schedule Next Check that will put the date into next year and also you can upload any documents if needed and Save.

The screenshot shows the 'Edit details of existing safety check' form. It has several fields: 'Responsibility' (Agent), 'Due Date' (22/11/2024), 'Boiler Service' (toggle), 'Completed' (toggle, highlighted with an orange circle), 'Completed By' (Topsy Turvey), 'Schedule Next Check' (toggle), and 'Next Due Date' (22/11/2025). Below these is a 'Document' section with a dashed box and a camera icon, with the text 'Drag and drop files here or click to upload'. A vertical scrollbar is visible on the right side of the form.



Responsibility Agent

Due Date 22/11/2024

Boiler Service ☒

Completed ☒

Completed By Topsy Turvey

Schedule Next Check ☒

Next Due Date 22/11/2025

Document

Cancel Save

Schedule Next Check ☒

Next Due Date 22/11/2025

Document

Drag and drop files here or click to upload documents

Cancel Save

24

Once you have scrolled down, find Gas Safety and click on it, the property you were managing is no longer showing in the list.

