

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



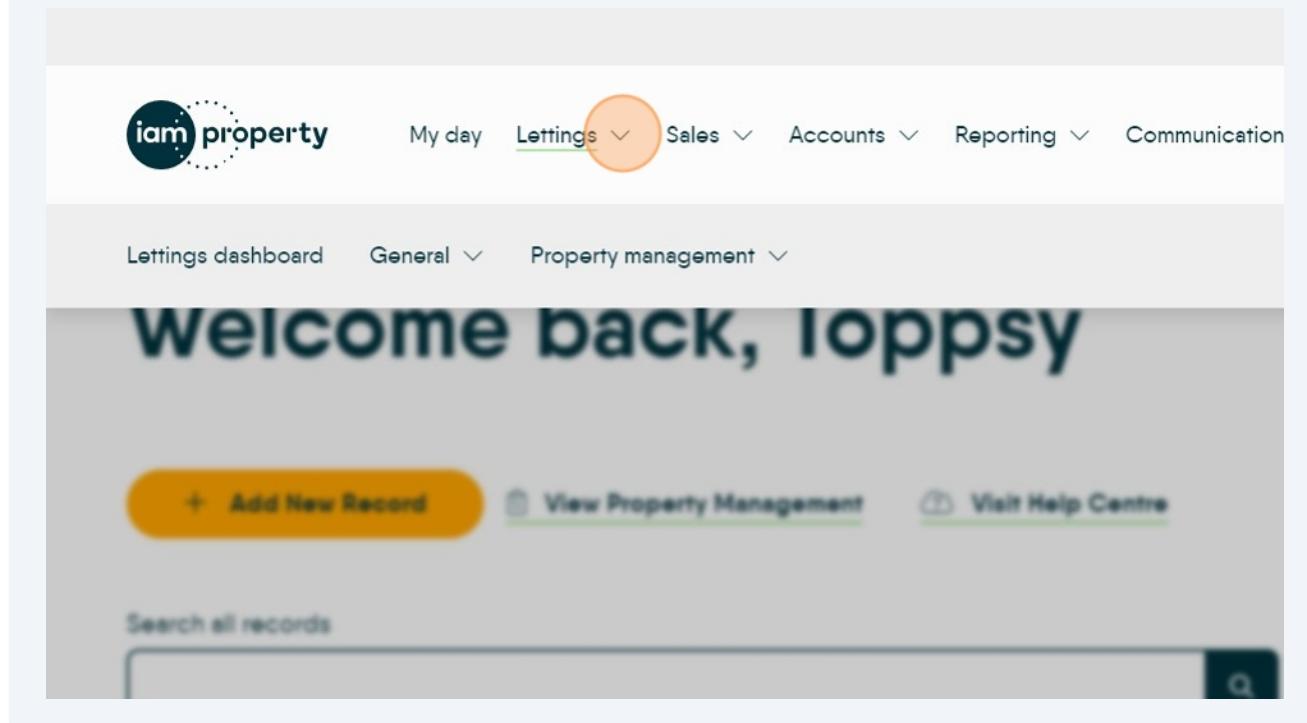
This guide provides clear, step-by-step instructions for accessing and utilising the Lettings or Sales Dashboard Activity lists effectively, ensuring users can navigate the platform with ease. Also an example of how the Activity list can be used.

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

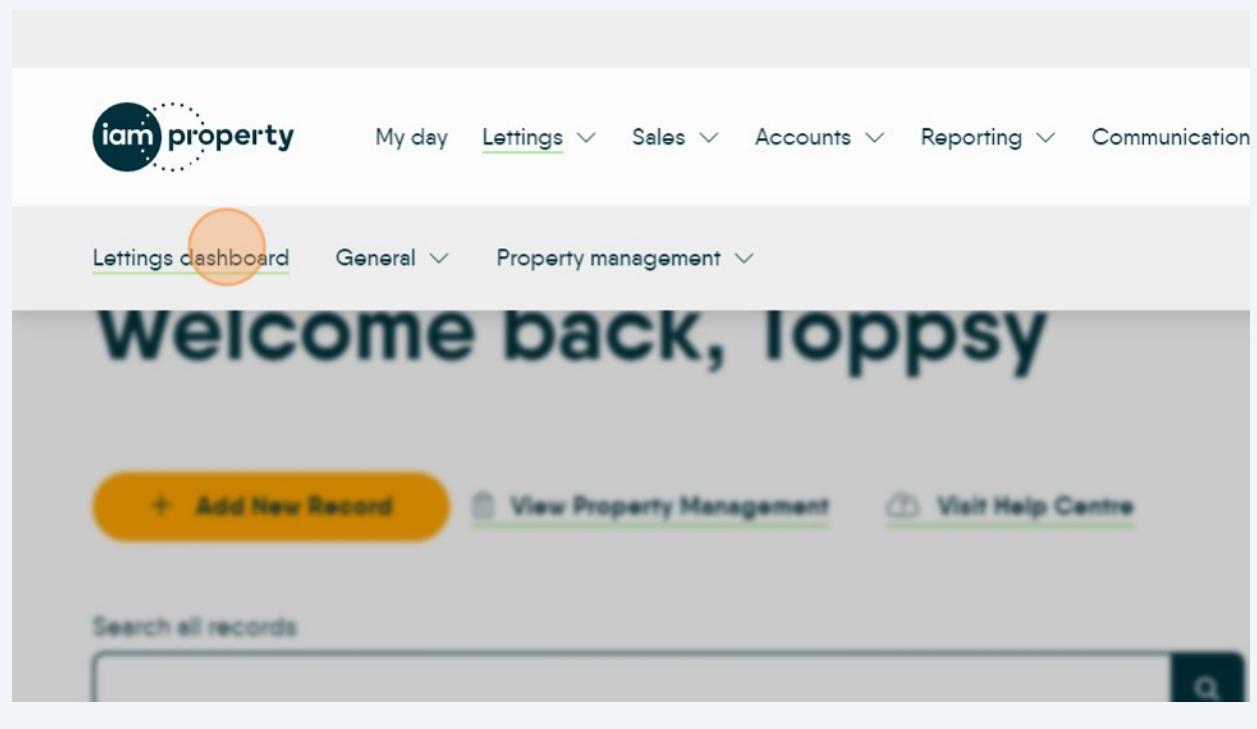
- 1 Navigate to <https://crm.iamproperty.com/Dashboards/Lettings>

**(i)** 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"



Lettings dashboard General Property management

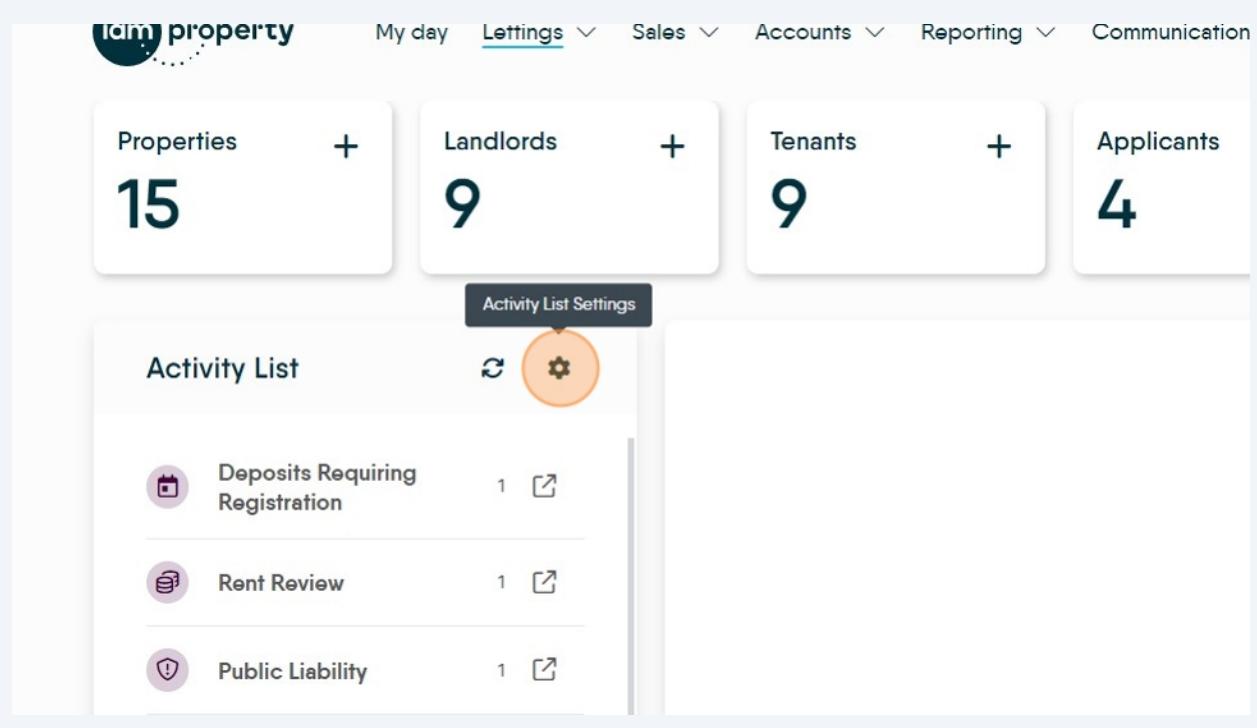
# Welcome back, Toppsy

+ Add New Record View Property Management Visit Help Centre

Search all records

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.



Properties + 15 Landlords + 9 Tenants + 9 Applicants + 4

Activity List

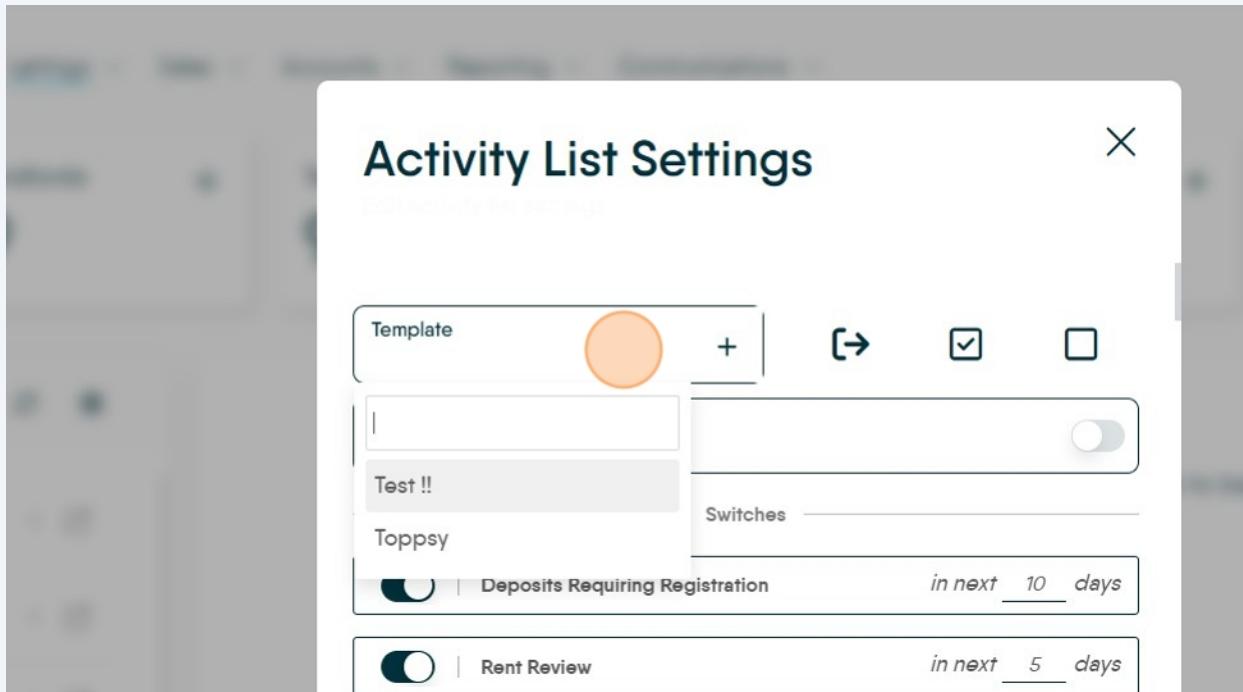
Activity List Settings

Deposits Requiring Registration	1	edit
Rent Review	1	edit
Public Liability	1	edit

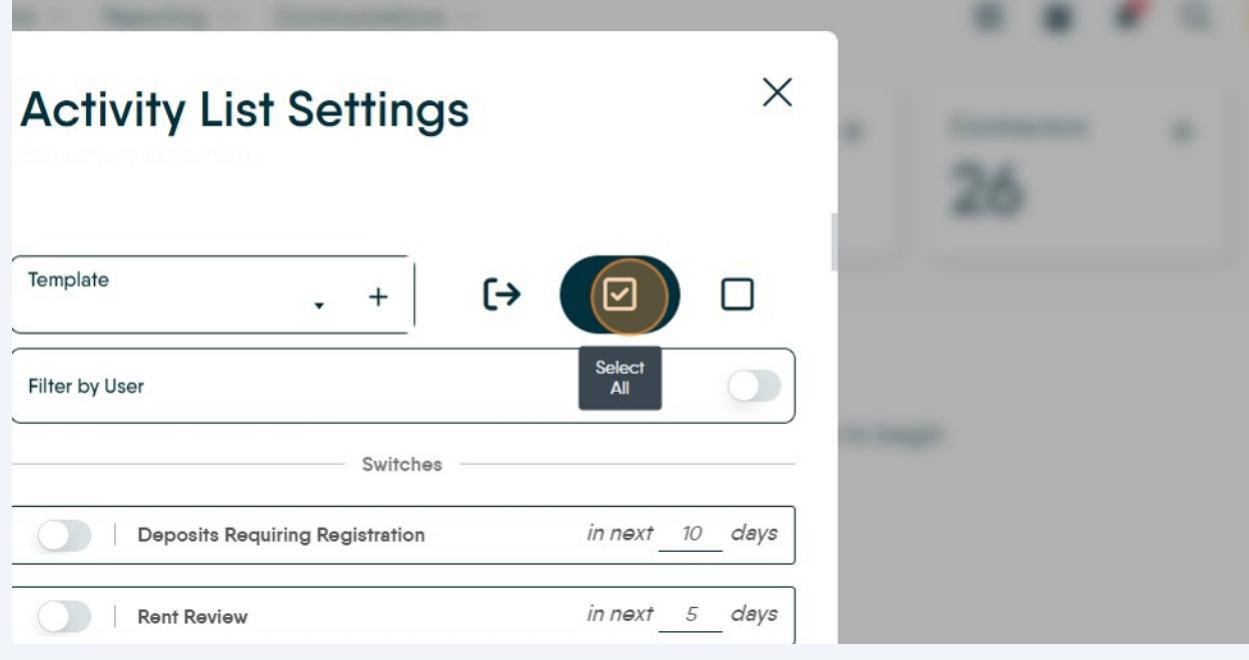
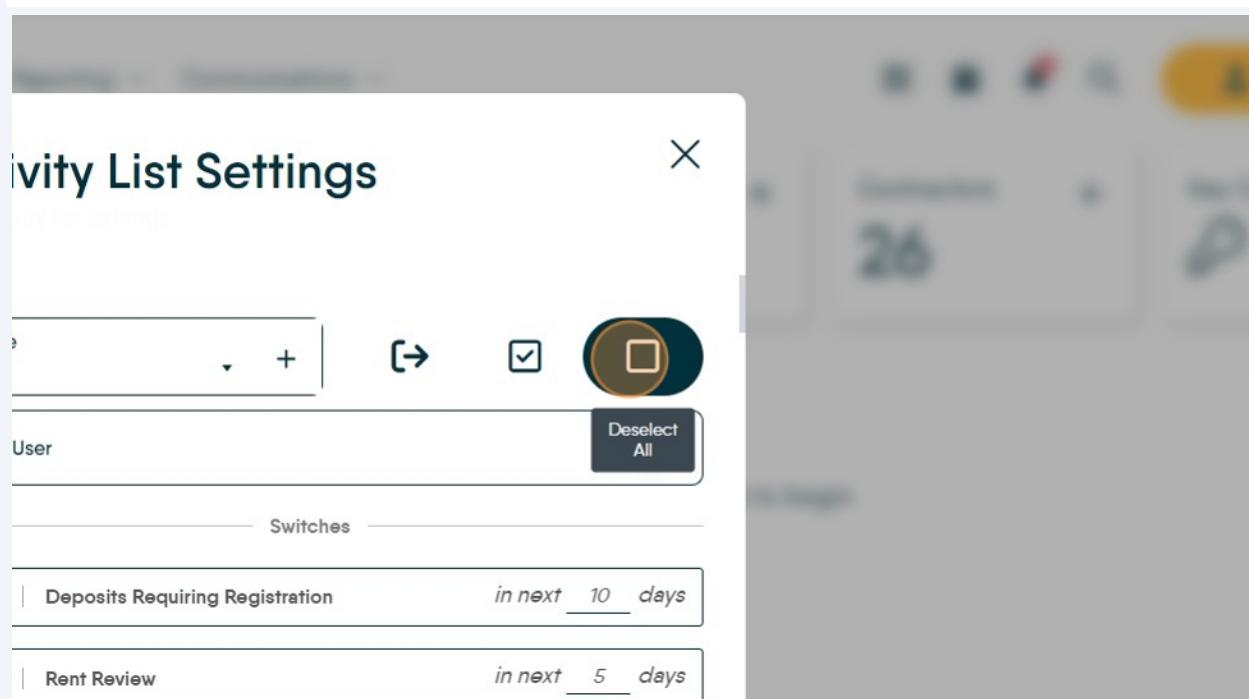
## Editing the Activity List

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.

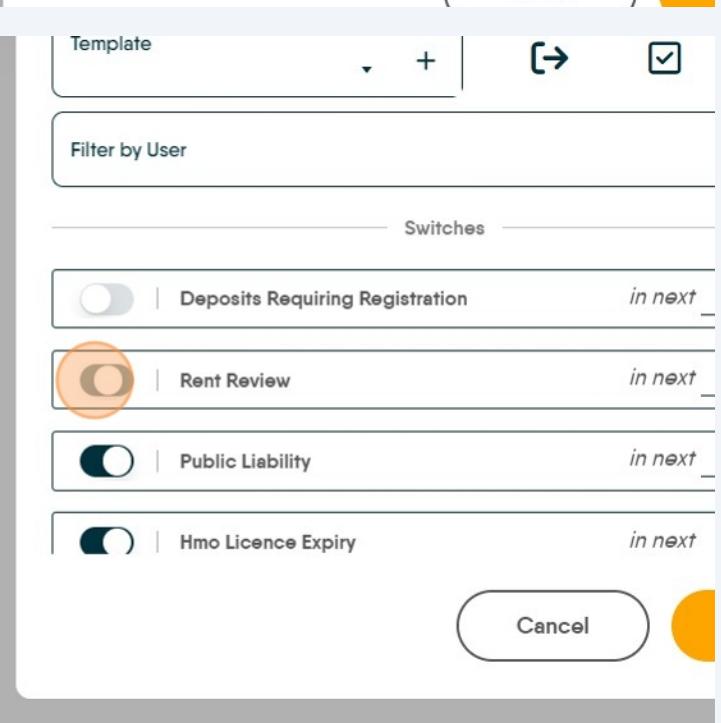
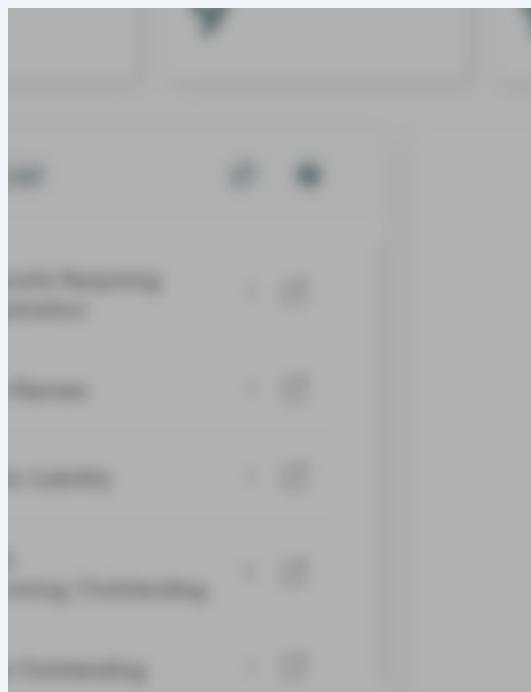


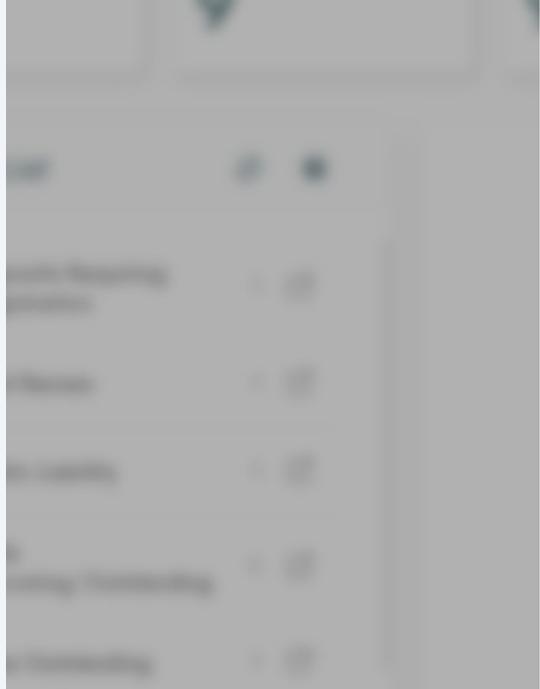
6 The next icon is Deselect all, this allows you to deselect all the currently selected options and select only the ones that you require & 'select all' allows you to do the reverse.  
Click here.



7

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





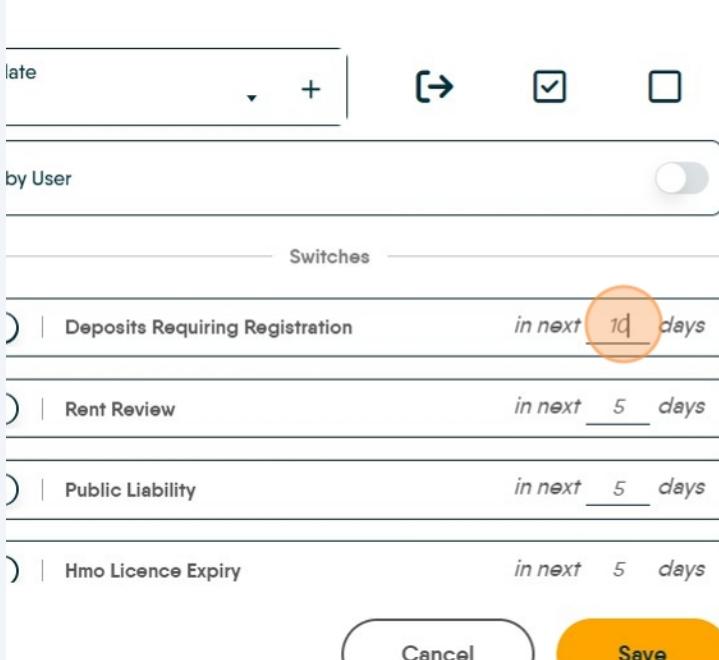
Template

Filter by User

Switches

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

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*  days
- Rent Review *in next*  days
- Public Liability *in next*  days
- Hmo Licence Expiry *in next*  days



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

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

List Settings

Switches

Requiring Registration      in next 60 days

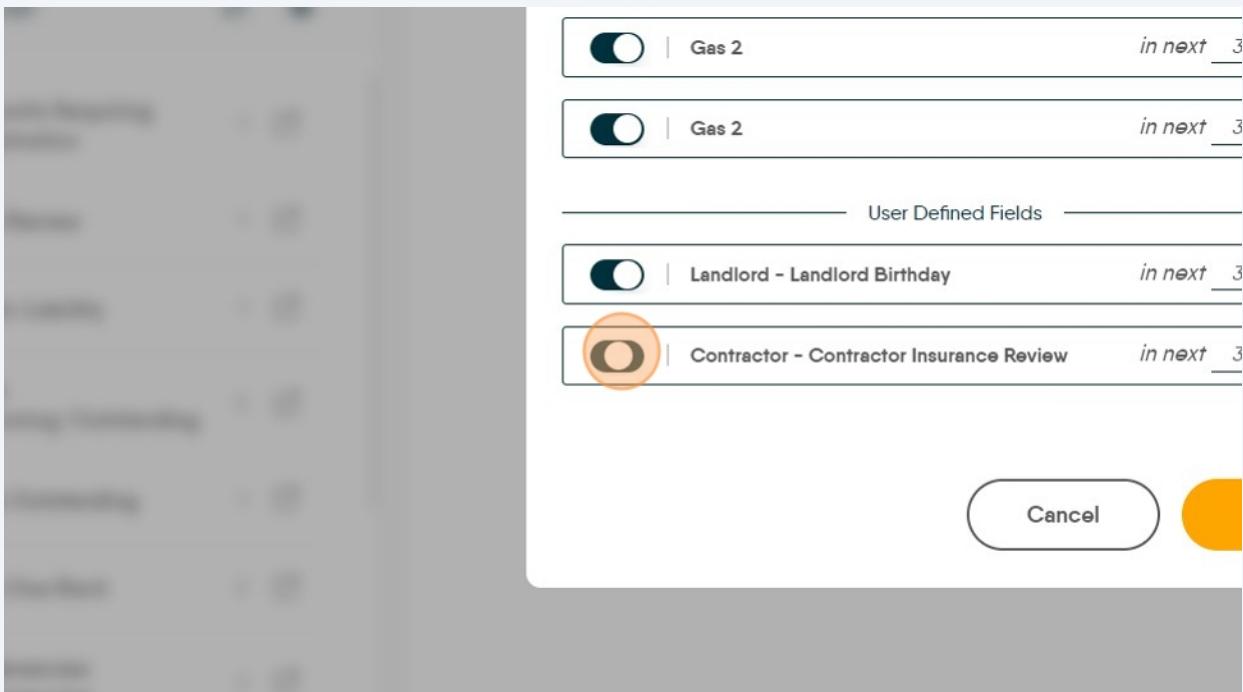
view      in next 5 days

ability      in next 5 days

Cancel      Save

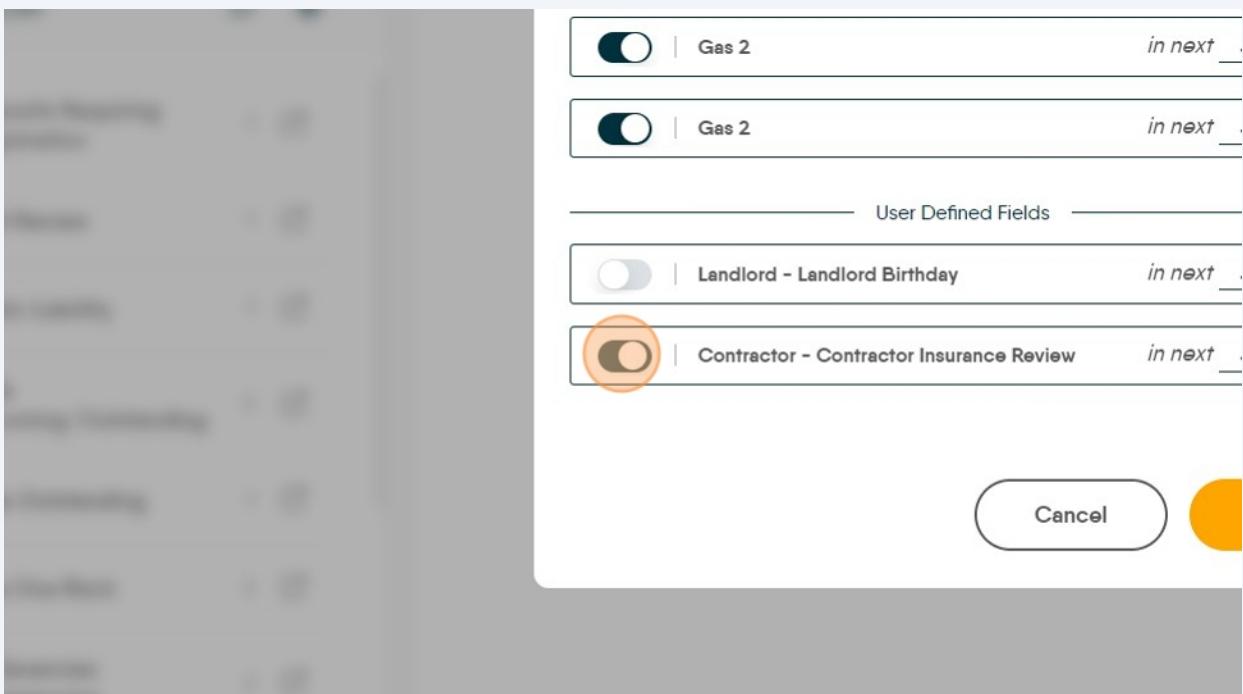
10

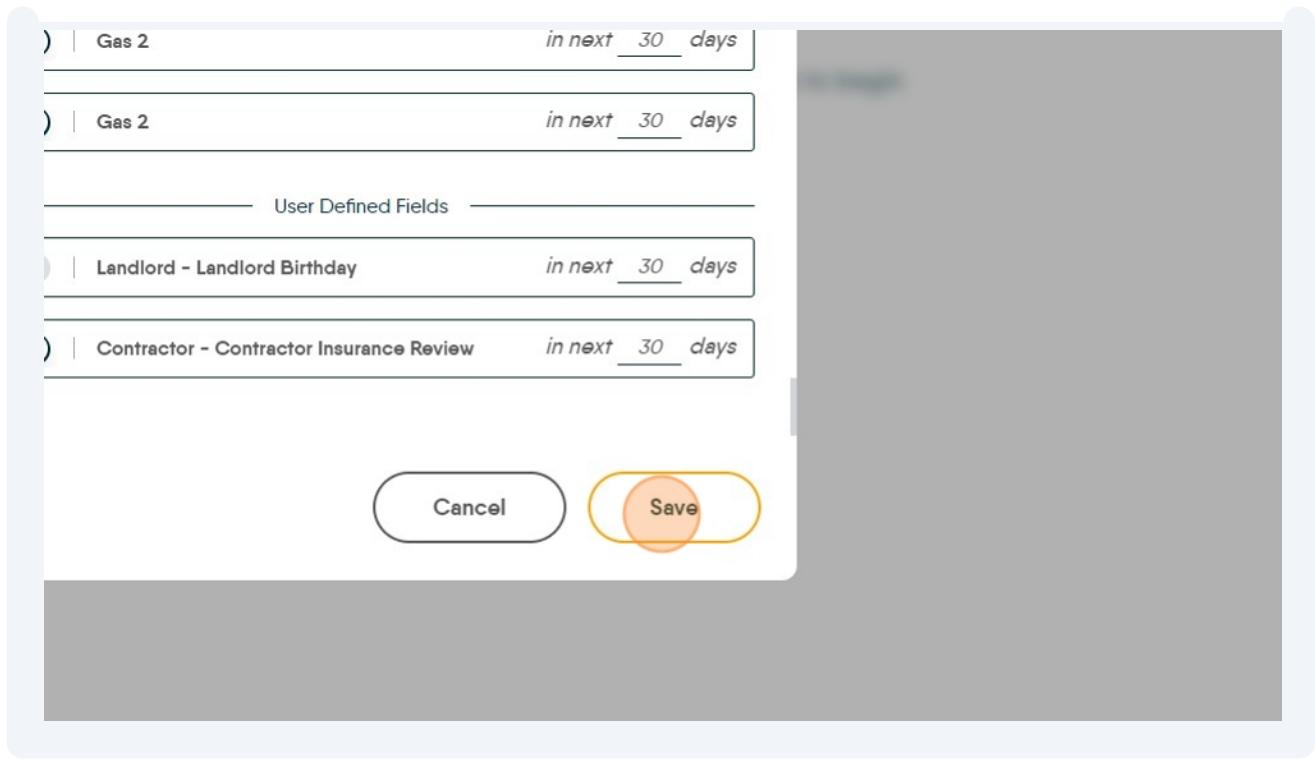
At the bottom of the page you can also track UDF's (User Defined Fields) you have created. The requirement is that the UDF has a date as the response and they will show on the activity list, and can be selected and deselected the same as above,



11

Make sure you save the changes.  
Click "Save"

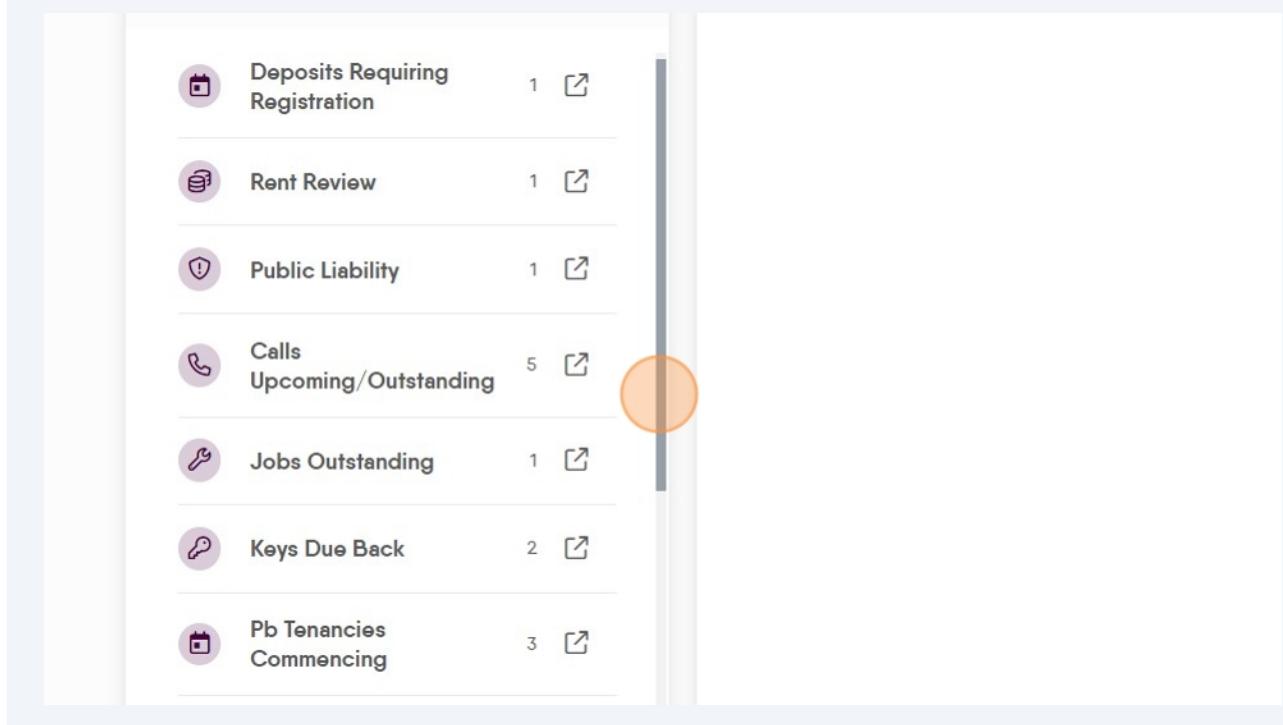




## Using the Activity List

**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.



	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.

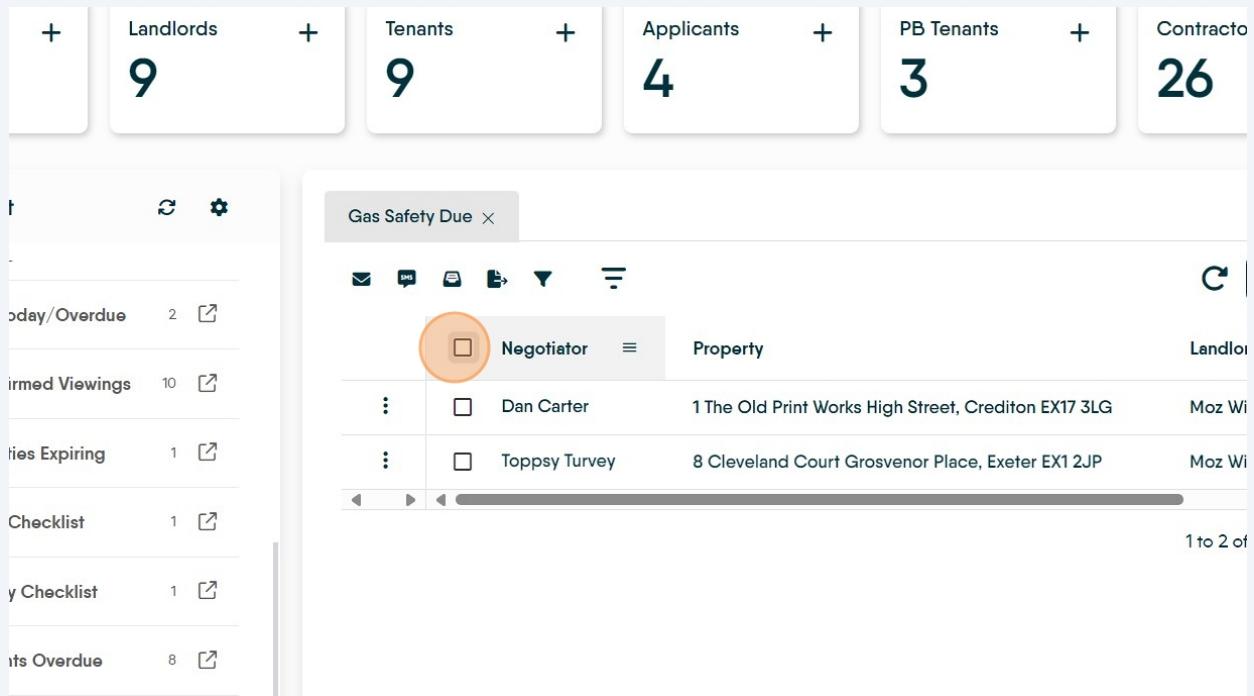
13

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.



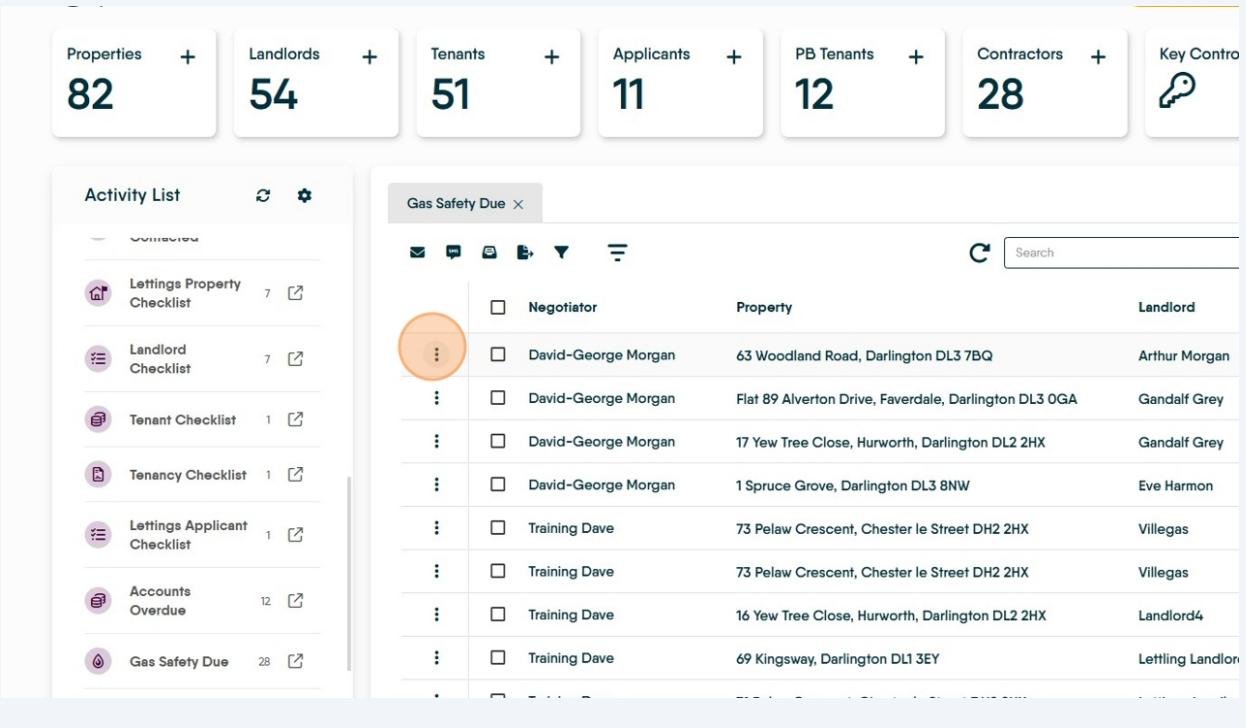
The screenshot shows a software interface with a navigation bar at the top and a main content area below. The navigation bar contains five categories with counts: Landlords (9), Tenants (9), Applicants (4), PB Tenants (3), and Contractors (26). Below the navigation bar is a sidebar with various activity filters and counts, such as 'Today/Overdue' (2), 'Planned Viewings' (10), 'Leases Expiring' (1), 'Checklist' (1), 'My Checklist' (1), and 'Tasks Overdue' (8). The main content area is titled 'Gas Safety Due' and displays a list of tasks. Each task row has a checkbox next to 'Negotiator' (which is highlighted with an orange circle), followed by the name of the negotiator, the property address, and the landlord's name. The list shows two tasks: 'Dan Carter' at '1 The Old Print Works High Street, Crediton EX17 3LG' for 'Moz Wi' and 'Topsy Turvey' at '8 Cleveland Court Grosvenor Place, Exeter EX1 2JP' for 'Moz Wi'. A scroll bar is visible on the right side of the list.



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.

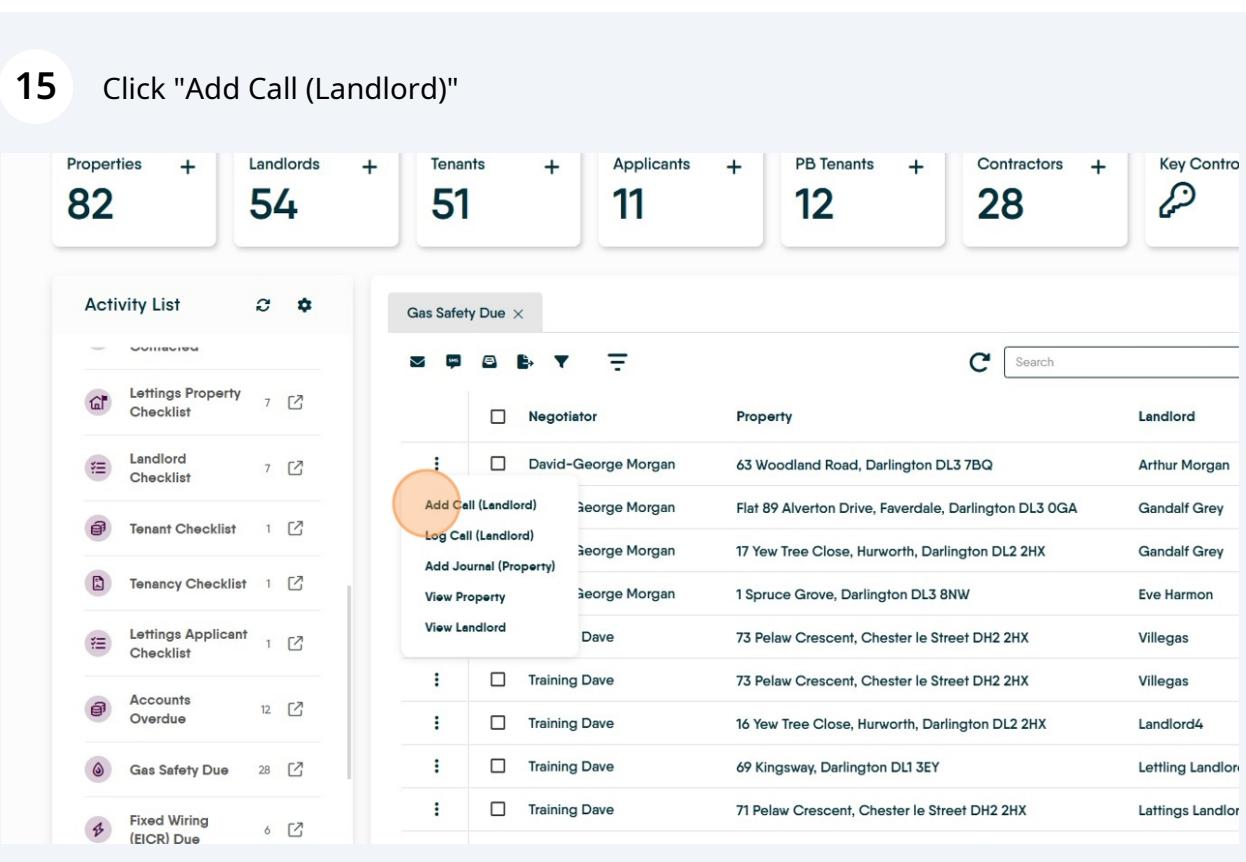


The screenshot shows a software interface with a navigation bar at the top displaying counts for Properties (82), Landlords (54), Tenants (51), Applicants (11), PB Tenants (12), Contractors (28), and Key Control. Below this is a sidebar titled 'Activity List' with a 'Gas Safety Due' section. The 'Gas Safety Due' section contains a table with columns for Negotiator, Property, and Landlord. The first row, representing 'David-George Morgan' at '63 Woodland Road, Darlington DL3 7BQ', is highlighted with an orange circle around its 3-dot menu icon.

Negotiator	Property	Landlord
David-George Morgan	63 Woodland Road, Darlington DL3 7BQ	Arthur Morgan
David-George Morgan	Flat 89 Alverton Drive, Faverdale, Darlington DL3 0GA	Gandalf Grey
David-George Morgan	17 Yew Tree Close, Hurworth, Darlington DL2 2HX	Gandalf Grey
David-George Morgan	1 Spruce Grove, Darlington DL3 8NW	Eve Harmon
Training Dave	73 Pelaw Crescent, Chester le Street DH2 2HX	Villegas
Training Dave	73 Pelaw Crescent, Chester le Street DH2 2HX	Villegas
Training Dave	16 Yew Tree Close, Hurworth, Darlington DL2 2HX	Landlord4
Training Dave	69 Kingsway, Darlington DL1 3EY	Lettling Landlord

15

Click "Add Call (Landlord)"



The screenshot shows the same software interface as the previous one, but the 'Gas Safety Due' table has been modified. The first row for 'David-George Morgan' now includes a sub-menu with options: 'Add Call (Landlord)', 'Log Call (Landlord)', 'Add Journal (Property)', 'View Property', and 'View Landlord'. The 'Add Call (Landlord)' option is highlighted with an orange circle.

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.

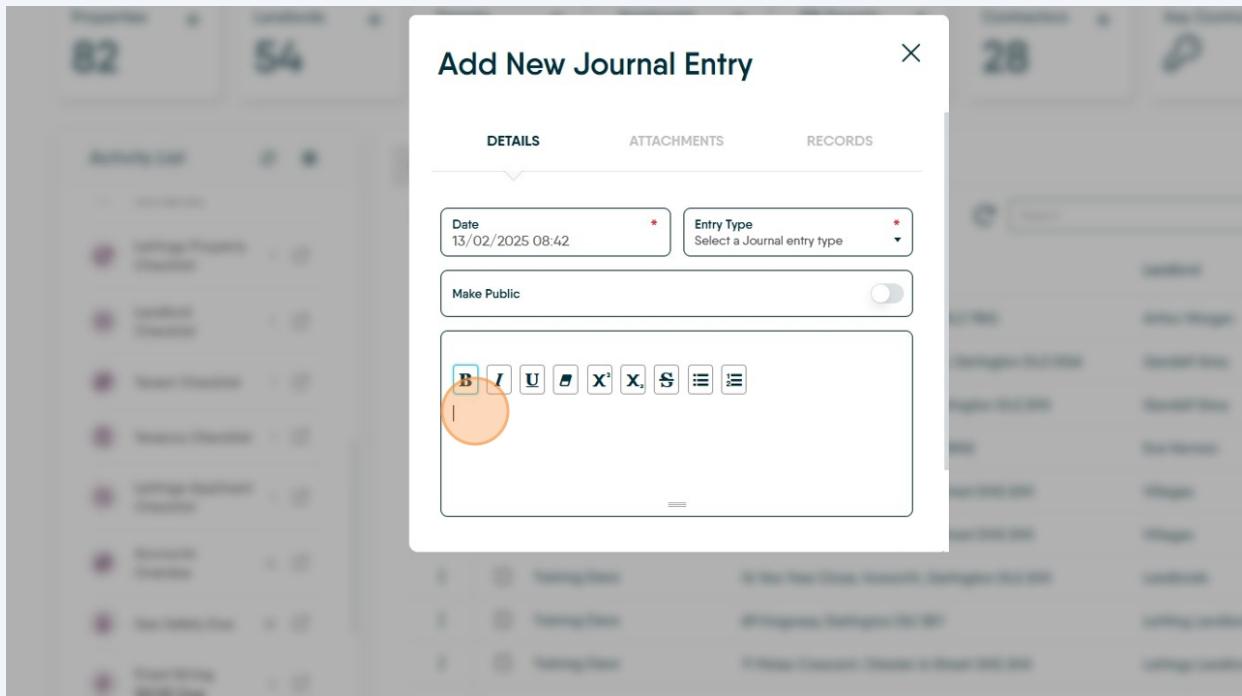
The screenshot shows the CRM's main dashboard with various statistics: Properties (82), Landlords (54), Tenants (51), Applicants (11), PB Tenants (12), and Contractors (28). On the left, there's an 'Activity List' for 'Gas Safety Due' with several entries. On the right, a modal window titled 'Add new call' is open, showing fields for 'Select Contact' (with a placeholder 'Please enter 1 or more characters'), 'Reminder' (set to 'No reminder'), and 'Description' (with a 'Call Description' text area). A green button at the top right of the modal says 'Mark Call as Completed'.

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's main dashboard with the same statistics as before. On the left, the 'Activity List' for 'Gas Safety Due' includes options like 'Add Call (Landlord)', 'Log Call (Landlord)', 'Add Journal (Property)', 'View Property', and 'View Landlord'. The 'Add Journal (Property)' option is highlighted with a red circle. On the right, a table lists property details: Negotiator (David-George Morgan), Property (63 Woodland Road, Darlington DL3 7BQ), and Landlord (Arthur Morgan). The table also includes rows for other properties and landlords, such as 'Flat 89 Alverton Drive, Faverdale, Darlington DL3 0GA' (Landlord Gandalf Grey) and '17 Yew Tree Close, Hurworth, Darlington DL2 2HX' (Landlord Gandalf Grey).

18 Click here.



## Using the Activity List to record the outcome

19 To get to the property record. Click here.

	<input type="checkbox"/> Negotiator	Property
⋮	<input type="checkbox"/> David-George Morgan	63 Woodland
⋮	<input type="checkbox"/> David-George Morgan	Flat 89 Alverte
⋮	<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 screenshot shows a software interface with two main sections. On the left, there is a vertical checklist with the following items:

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

On the right, there is a list of properties with columns for Negotiator, Property, and an empty checkbox column. One row in the list is highlighted with an orange circle around the "View Property" button:

	Negotiator	Property
⋮	<input type="checkbox"/> David-George Morgan	63 Woodland
⋮	<input type="checkbox"/> David-George Morgan	Flat 89 Alverte
⋮	<input type="checkbox"/> David-George Morgan	1 Spruce Gro
⋮	<input type="checkbox"/> Training Dave	73 Pelaw Cres
	Add Call (Landlord)	Dave
	Log Call (Landlord)	Dave
	Add Journal (Property)	Dave
	<b>View Property</b>	Dave
	View Landlord	Dave
⋮	<input type="checkbox"/> David-George Morgan	12 Throstlene

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

The screenshot shows a software interface with a left-hand menu and a top bar. The top bar includes the following information:

- Lead landlord: Mr Moz Wilkes (L)
- View Landlords

The left-hand menu has the following items:

- Checklist
- Appraisals
- Inspections
- Accounts >
- Compliance** (highlighted with an orange circle)
- Information
- maintenance >
- Payment

22

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

Lead landlord: Mr Moz Wilkes (L) [View Landlords](#)

Lead tenant: Miss Georgia Taylor-Brown [View Tenants](#)

Reference:

Negotiator: Dan Carter [Branch: Turvey & Co](#)

Safety Checks

+ Add New + Add a new type

Chimney Sweep	⋮
Landlord	02/10/2024

Gas Safety	⋮
Agent	22/11/2024

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.

Edit details of existing safety check

Responsibility Agent Due Date 22/11/2024

Boiler Service

Completed  Completed By Topsy Turvey

Schedule Next Check  Next Due Date 22/11/2025

Document

Drop and drag files here or click to

Responsibility Agent \* Due Date 22/11/2024

Boiler Service

Completed  Completed By Topsy Turvey \*

Schedule Next Check  Next Due Date 22/11/2025

Document

Drag and drop files here or click to upload documents

Cancel Save

ule 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.

## Activity List



- Accounts Overdue 8
- Gas Safety Due 1
- Appliances Due 1
- Appraisals Requiring Conclusion 1
- Upcoming Appraisals 1

Properties

Landlords

Tenants

Applicants

9

9

4

## Activity List



Gas Safety Due



- Accounts Overdue 8
- Gas Safety Due 1
- Appliances Due 1

Negotiator

Property

Topsy Turvey

8 Cleveland Court Grosve