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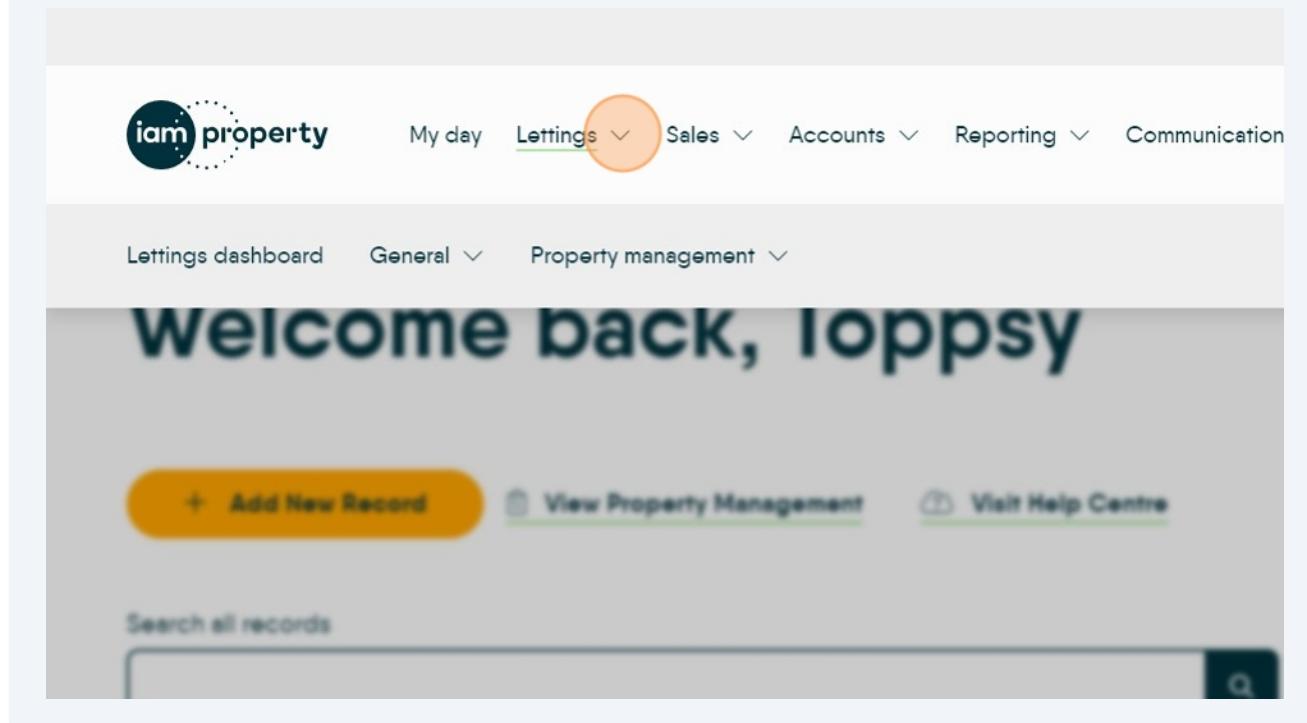
3 Click "Lettings dashboard" or "Sales Dashboard"

iam property   My day   Lettings ∨   Sales ∨   Accounts ∨   Reporting ∨   Communication
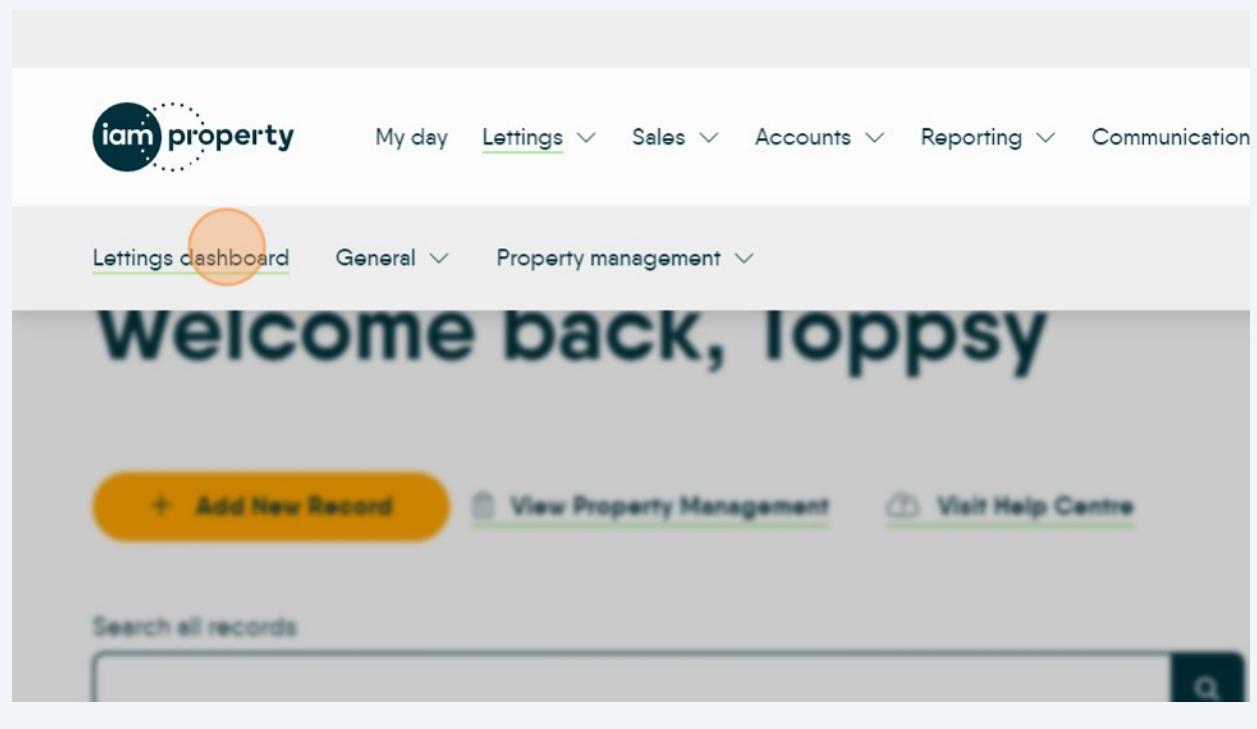
Lettings dashboard   General ∨   Property management ∨

welcome back, Ioppsy

+ 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.

iam property   My day   Lettings ∨   Sales ∨   Accounts ∨   Reporting ∨   Communication
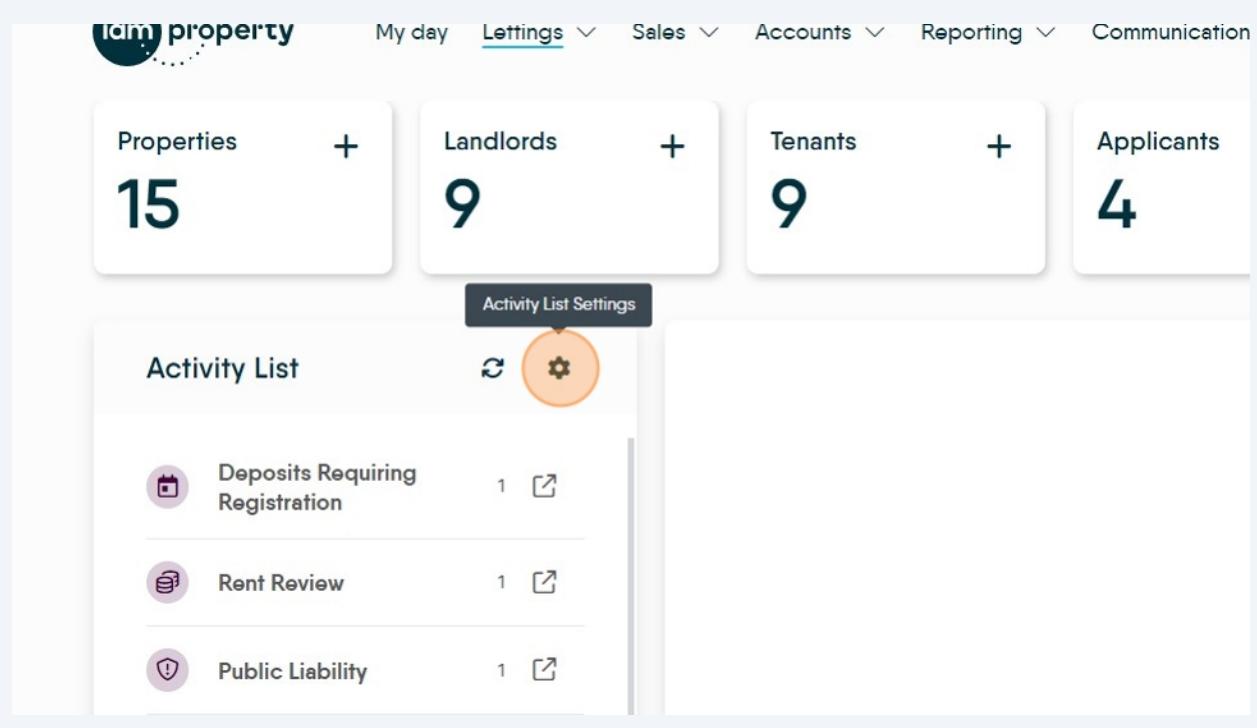
Properties	+	Landlords	+	Tenants	+	Applicants
15		9		9		4

Activity List Settings

Activity List   ⟳   ⚙

📅   Deposits Requiring Registration   1   ⬈

🪙   Rent Review   1   ⬈

🛡   Public Liability   1   ⬈

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.
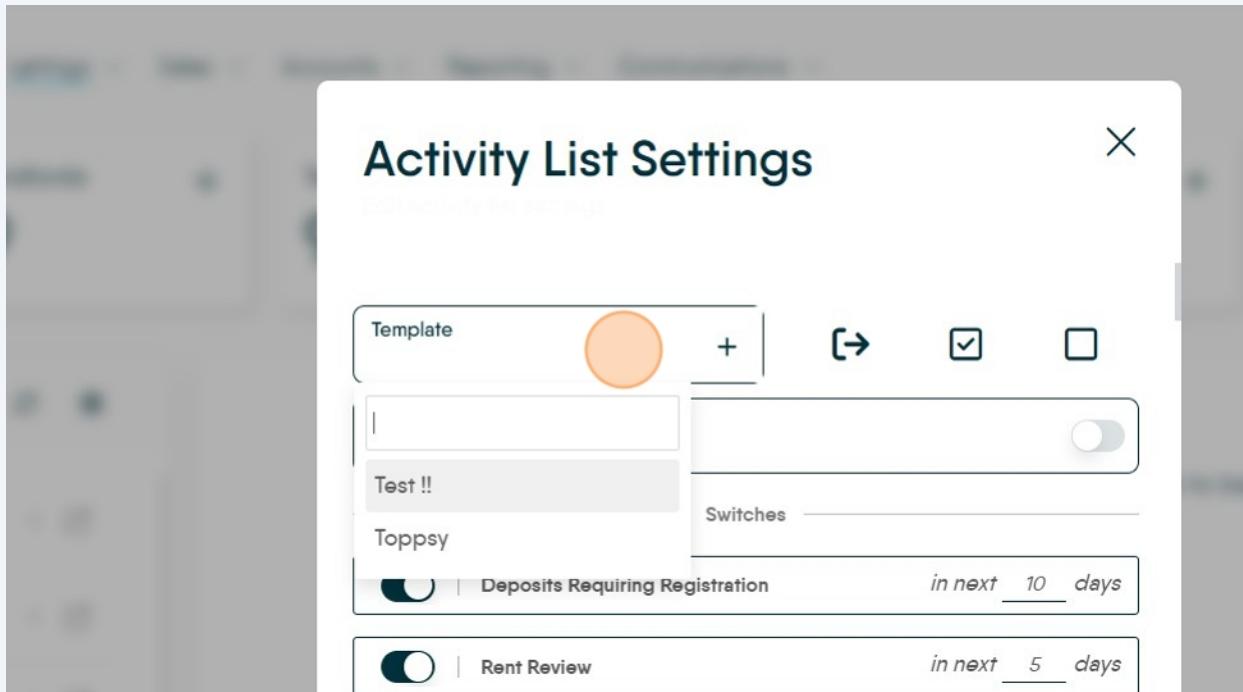
6 The next icon is Deselect all, this allows you to deselect all the currently selected options and select only the ones that you require & 'select all' allows you to do the reverse.
Click here.
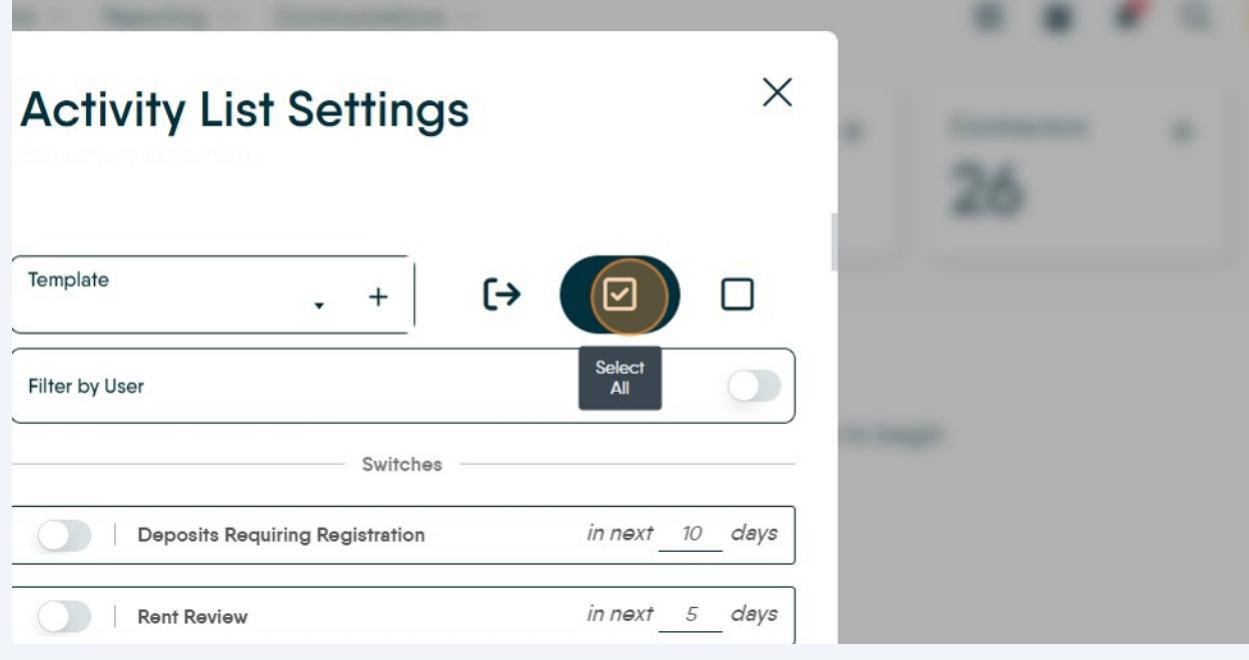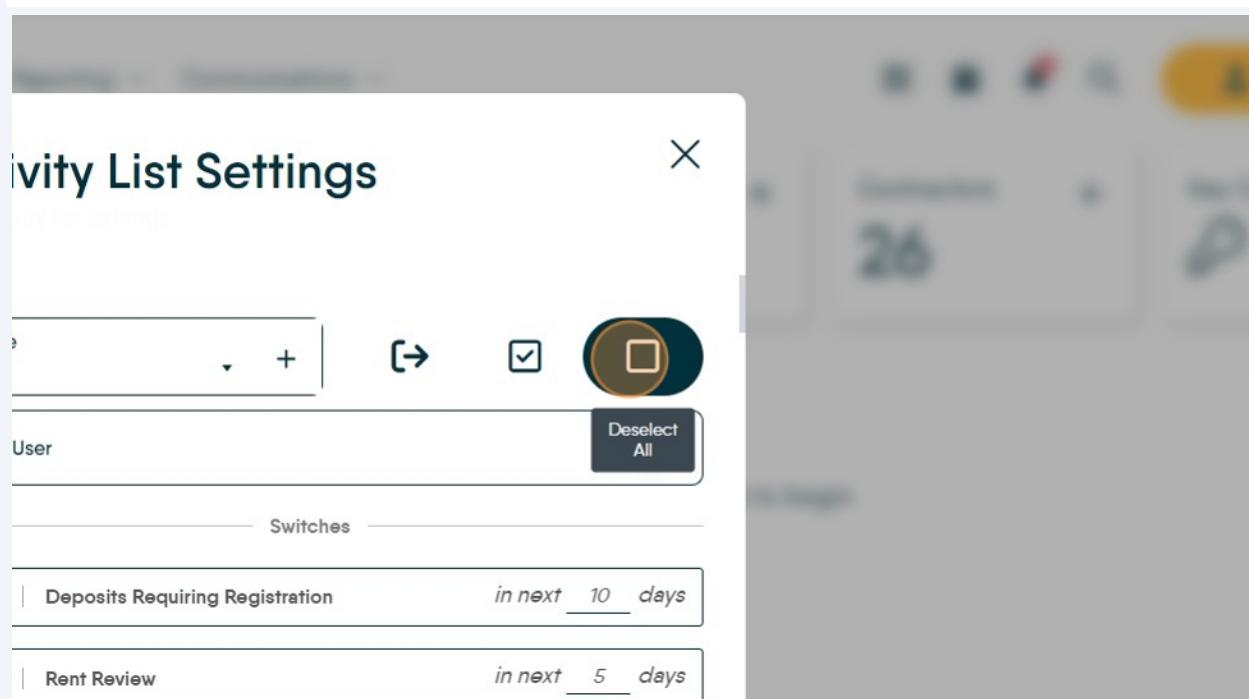
7 To the left of each activity is a button where you can select and deselect items individually.
Click here.
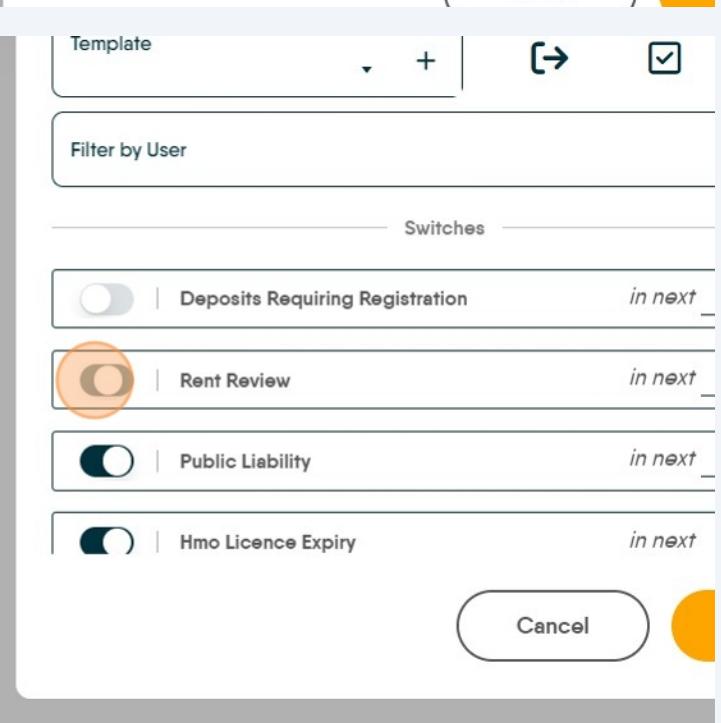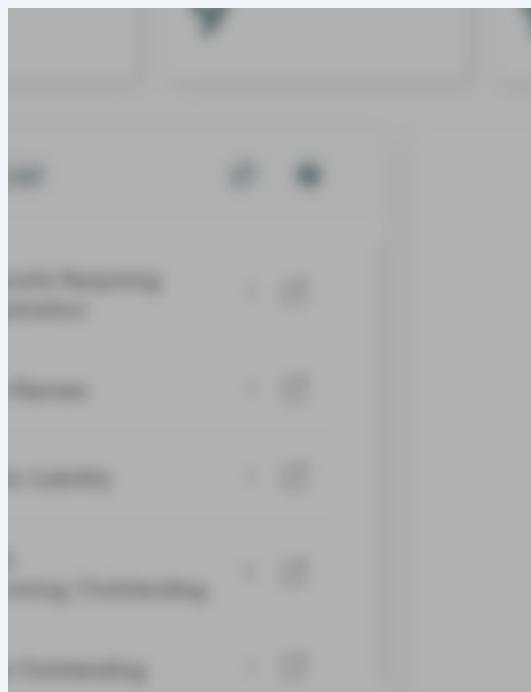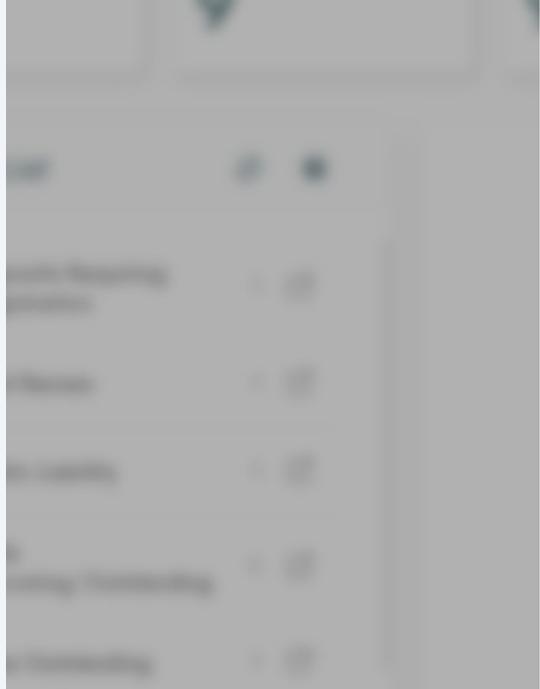
Template ▾ + [→ ☑

Filter by User

—— Switches ——

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

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.
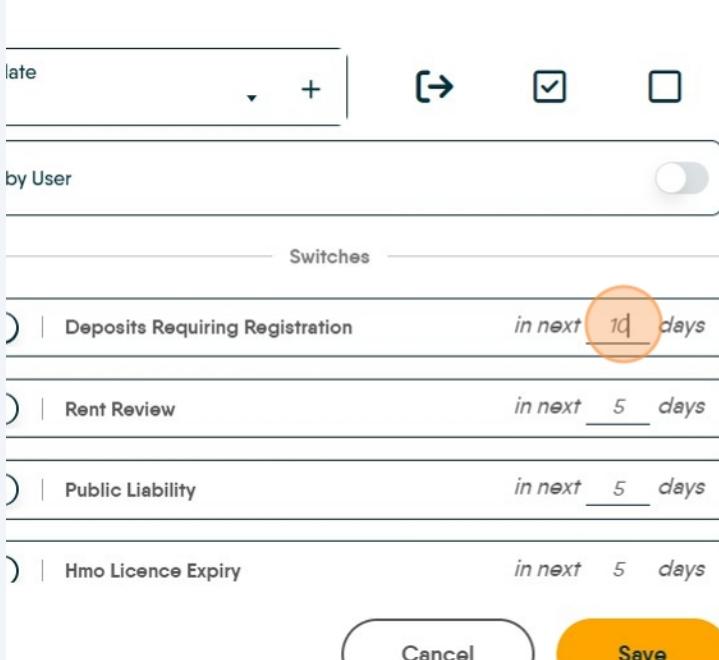
late	. +	[→] ☑ ☐
by User		⬤

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

late

by User

──── Switches ────

)	Deposits Requiring Registration	in next	0	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 ────

s Requiring Registration	in next	60	days
view	in next	5	days
ability	in next	5	days

26

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,

| | Gas 2 | in next 3 |
| | Gas 2 | in next 3 |

User Defined Fields

| | Landlord – Landlord Birthday | in next 3 |
| | Contractor – Contractor Insurance Review | in next 3 |

Cancel
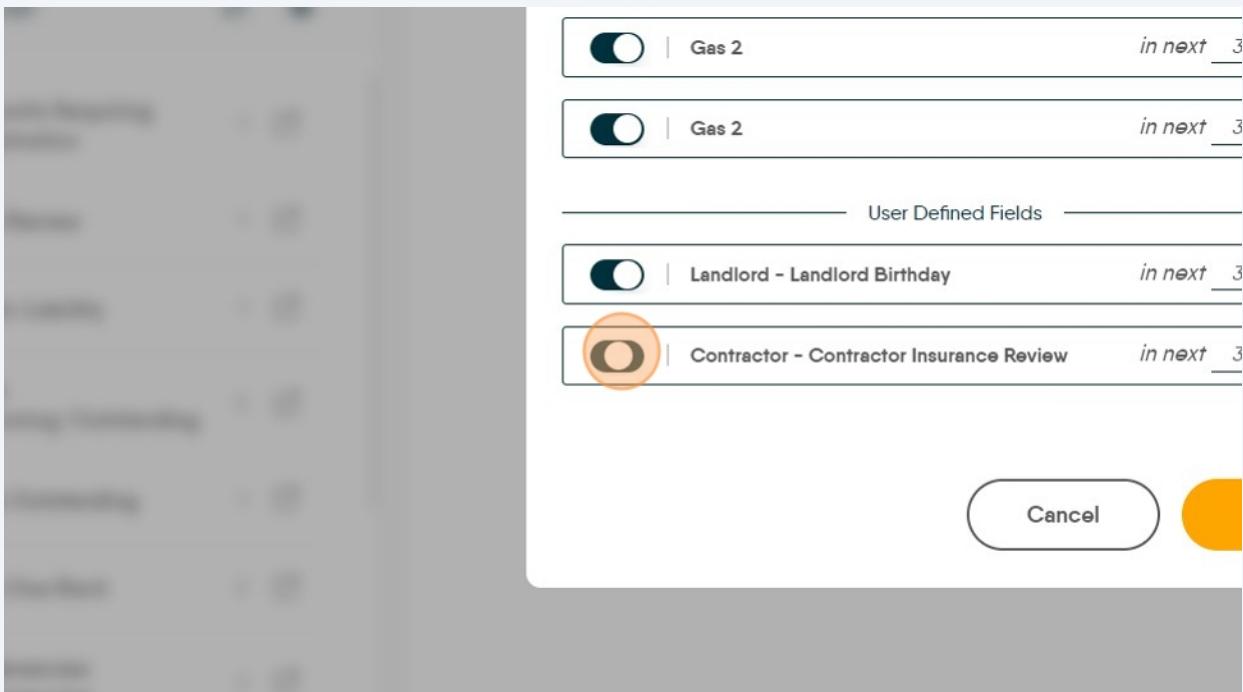
11 Make sure you save the changes.
Click "Save"

| | Gas 2 | in next |
| | Gas 2 | in next |

User Defined Fields

| | Landlord – Landlord Birthday | in next |
| | Contractor – Contractor Insurance Review | in next |

Cancel
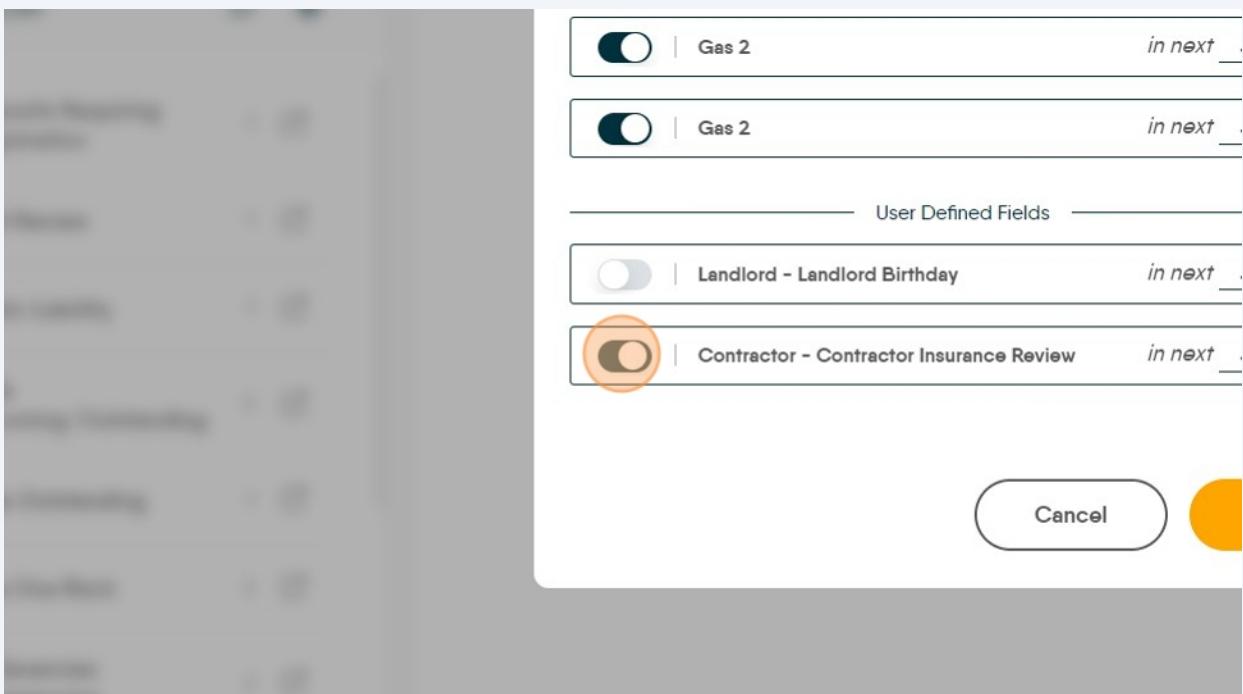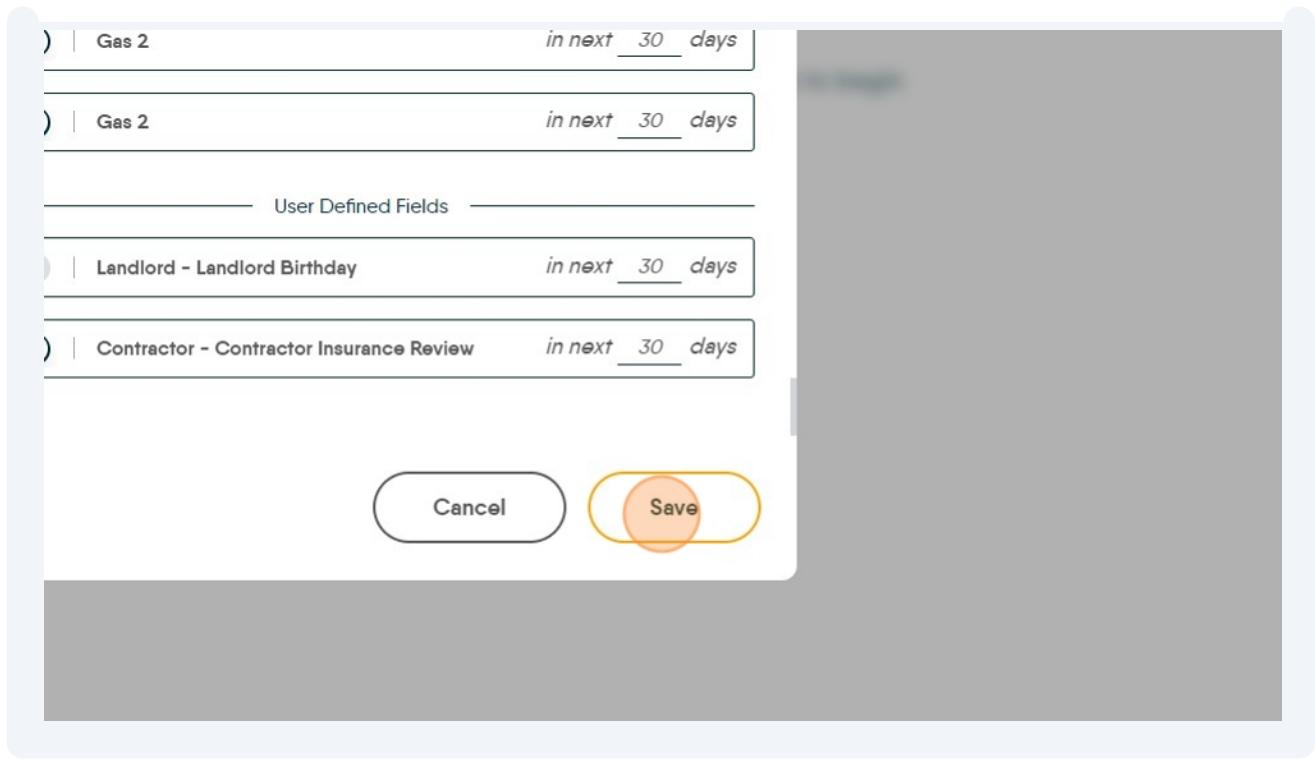
Using the Activity List

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.
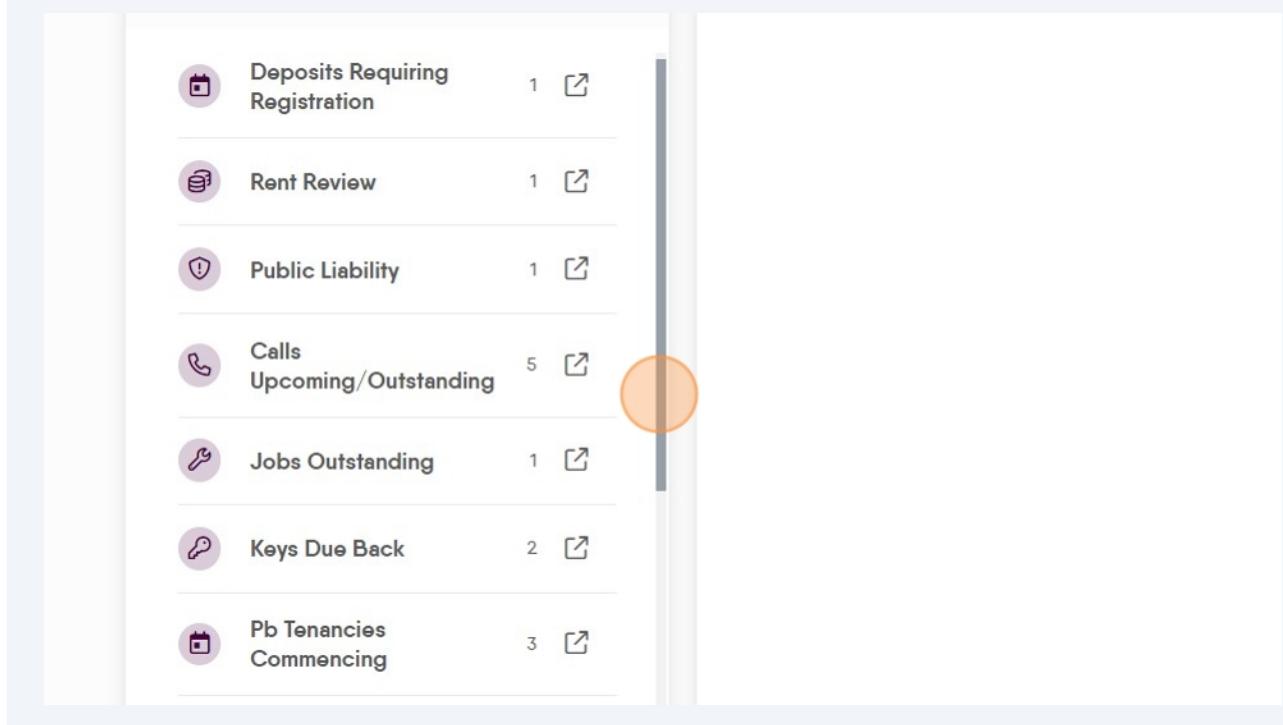
⊘	Tasks Today/Overdue	2
⊠	Unconfirmed Viewings	10
⌂	Warranties Expiring	1
⊜	Tenant Checklist	1
▤	Tenancy Checklist	1
⊜	Accounts Overdue	8
◌	Gas Safety Due	2

ⓘ Tip! To show how the Activty 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.

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.

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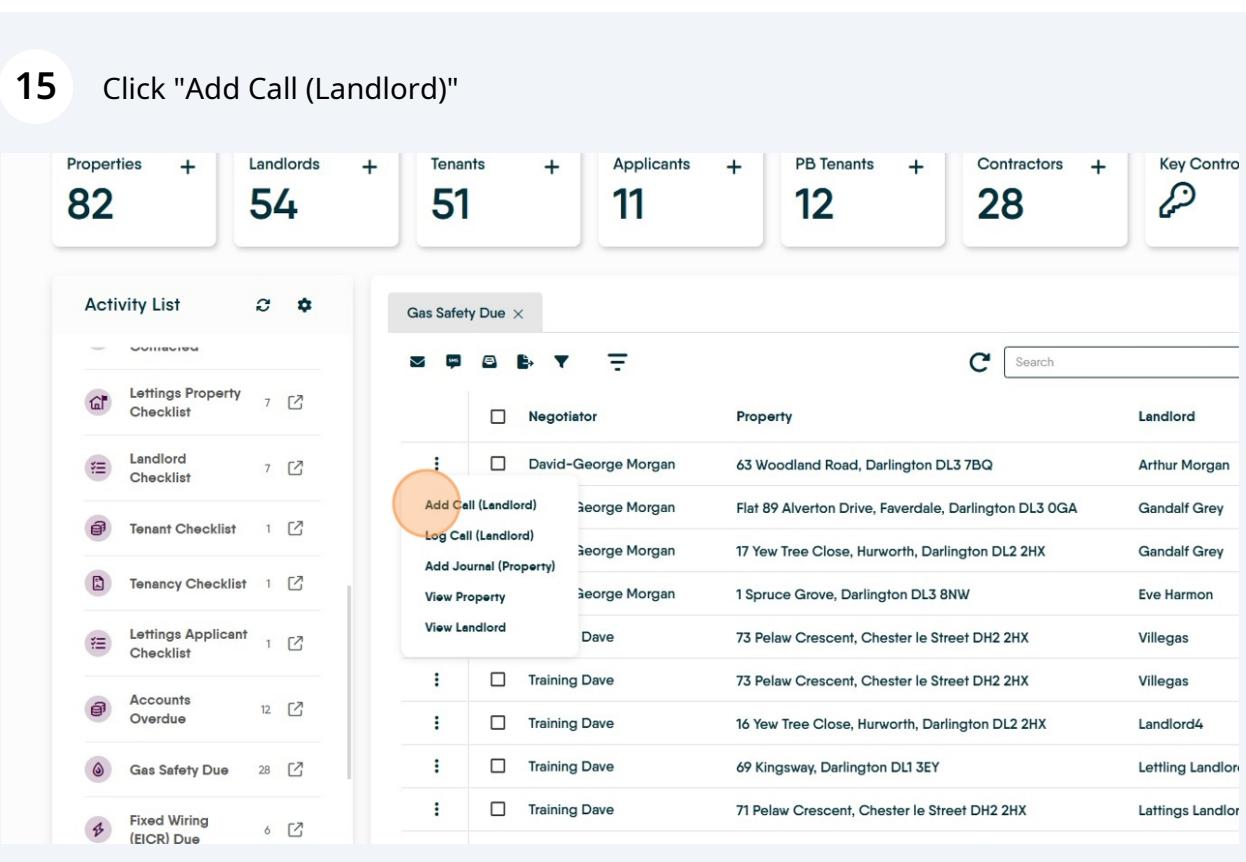
16 This will allow you to either (Add New Call) plan a call you will be making in the future or (Log Call) create a record of a call made to a Landlord.

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.
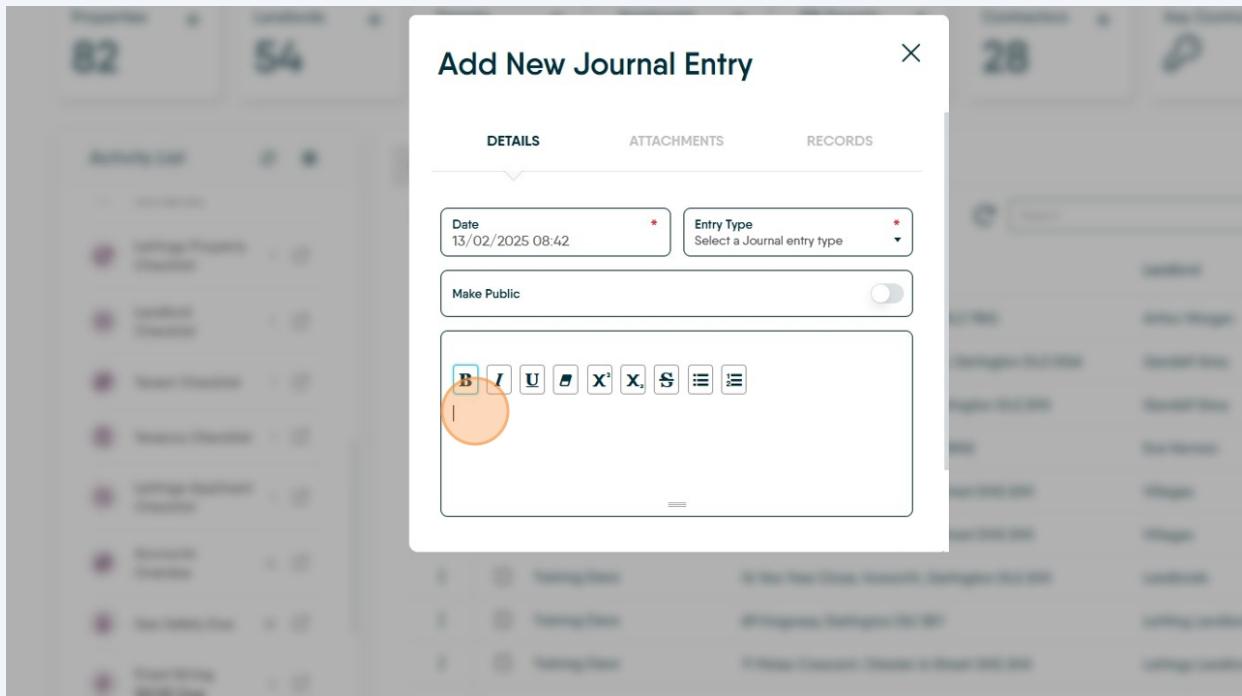
18   Click here.

Using the Activity List to record the outcome

19   To get to the property record. Click here.

20   Click "View Property"

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

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

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.

Responsibility *
Agent ▼

Due Date *
22/11/2024

Boiler Service ⬤

Completed ⬤

Completed By *
Toppsy Turvey ▼

Schedule Next Check ⬤

Next Due Date *
22/11/2025

———————— Document ————————

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	⬏

Landlords	Tenants	Applicants
9	9	4

ivity List

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

Gas Safety Due ✕

	Negotiator	Property
⋮ ☐	Toppsy Turvey	8 Cleveland Court Grosve