

# Creating a Checklist in iamproperty CRM

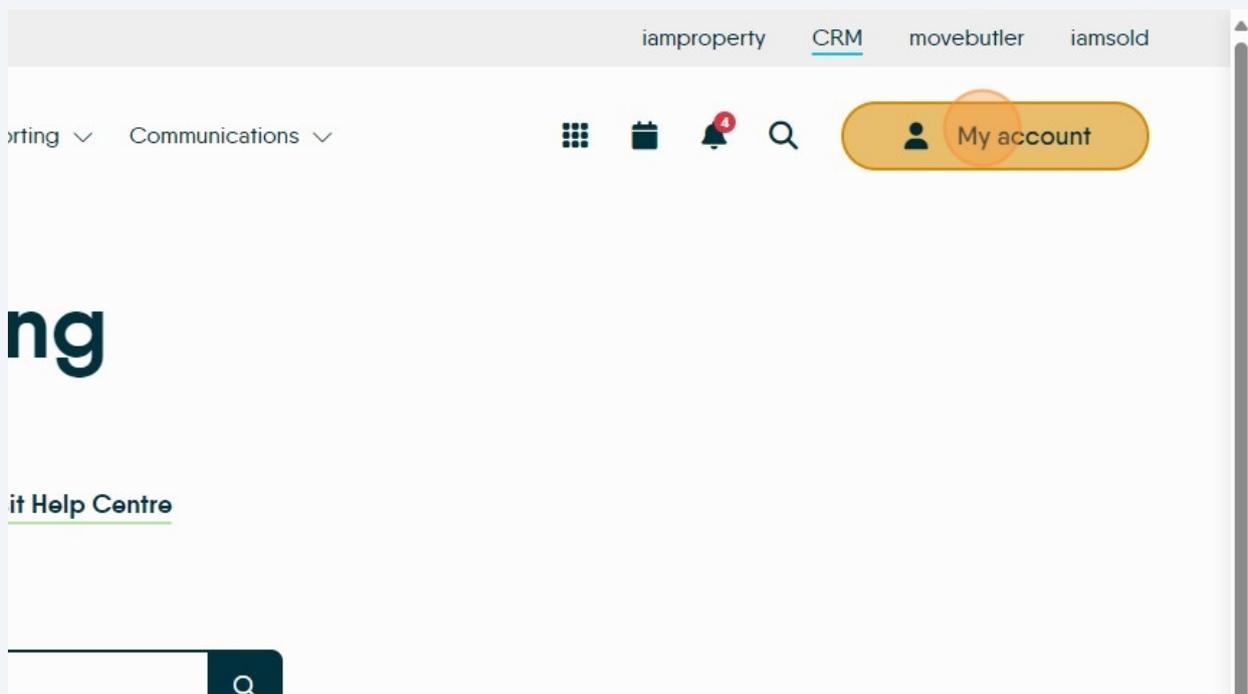


This guide provides a step-by-step process for creating a checklist in the iamproperty CRM, making it easier for users to organise and manage their tasks effectively.

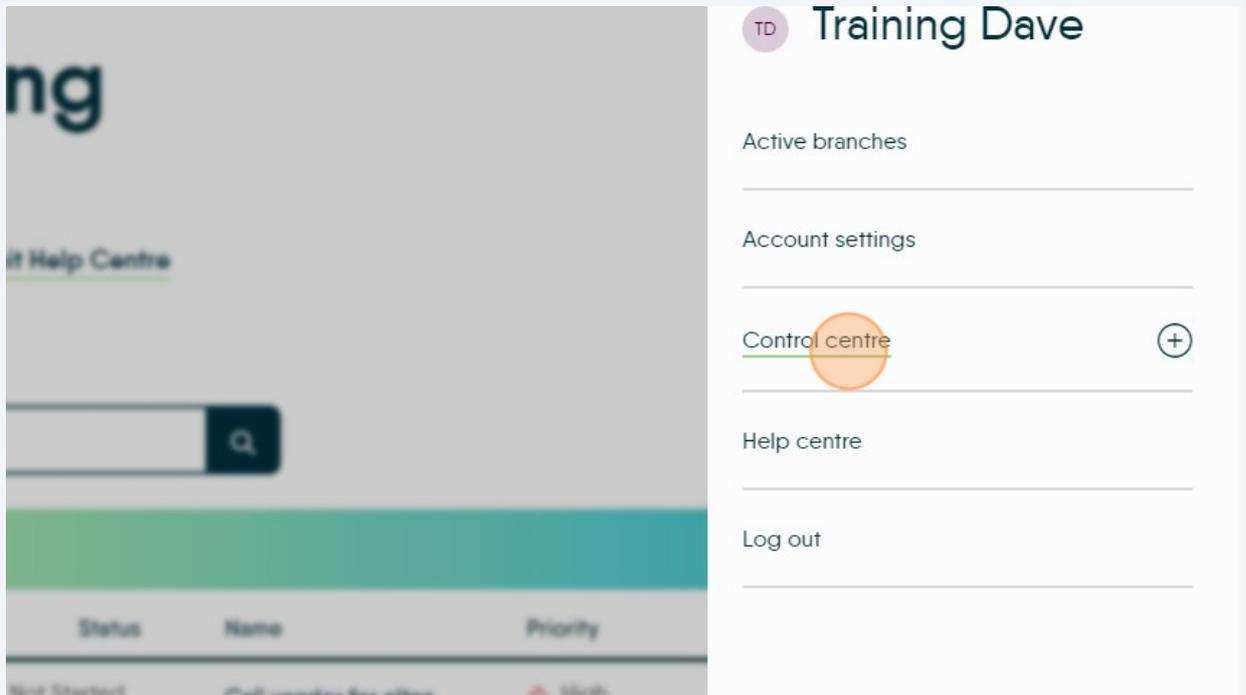
By following these instructions, users can streamline their workflow, enhance productivity, and ensure no important steps are overlooked in their tasks.

1 Navigate to <https://crm.iamproperty.com/MyDay>

2 Click "My account"



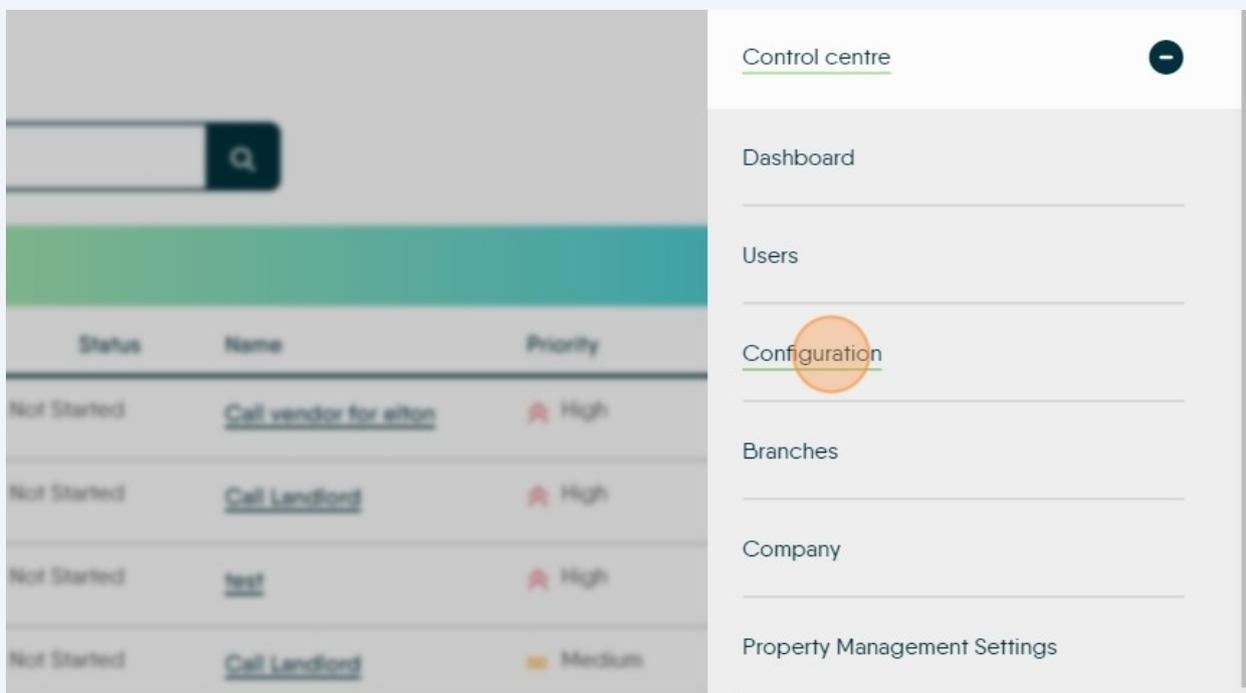
3 Click "Control centre"



The screenshot shows a user profile menu for 'Training Dave' (TD). The menu items are: Active branches, Account settings, Control centre (highlighted with an orange circle and a plus icon), Help centre, and Log out. In the background, a table with columns 'Status', 'Name', and 'Priority' is visible.

Status	Name	Priority
Not Started	Call vendor for elton	High
Not Started	Call Landford	High
Not Started	test	High
Not Started	Call Landford	Medium

4 Click "Configuration"



The screenshot shows the 'Control centre' dropdown menu. The menu items are: Dashboard, Users, Configuration (highlighted with an orange circle), Branches, Company, and Property Management Settings. The background shows the same table as in the previous screenshot.

Status	Name	Priority
Not Started	Call vendor for elton	High
Not Started	Call Landford	High
Not Started	test	High
Not Started	Call Landford	Medium

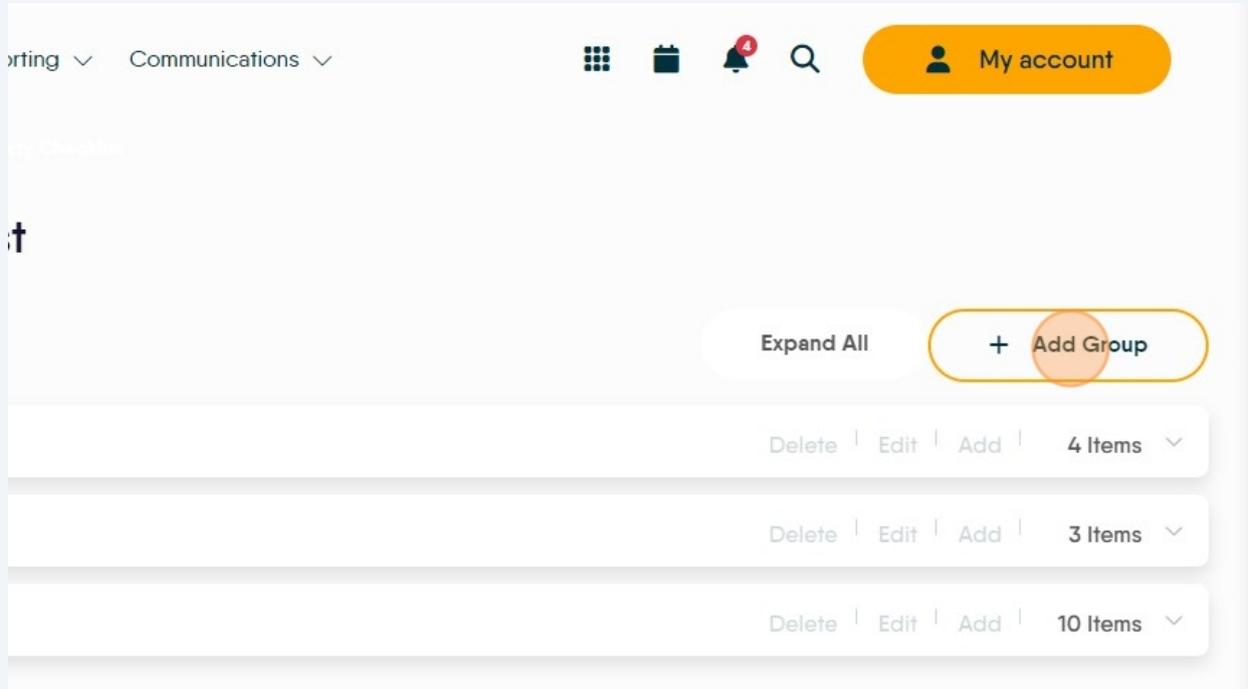
5 Click "Checklists"

The screenshot shows a settings interface. On the left is a vertical sidebar with menu items: 'inspections', 'Sales Progression Actions', 'Data Transfer', 'UDFs', 'Checklists' (highlighted with an orange circle), 'Lettings Applicant', 'Sales Applicant', and 'Landlord'. The main content area is divided into two sections. The top section is titled 'Gdpr - contact preferences' and contains four toggle switches: 'Use Defaults' (checked), 'Email' (checked), 'SMS' (checked), and 'Third Party' (unchecked). The bottom section is titled 'Applicant matching defaults' and contains one toggle switch: 'Matching Area' (checked).

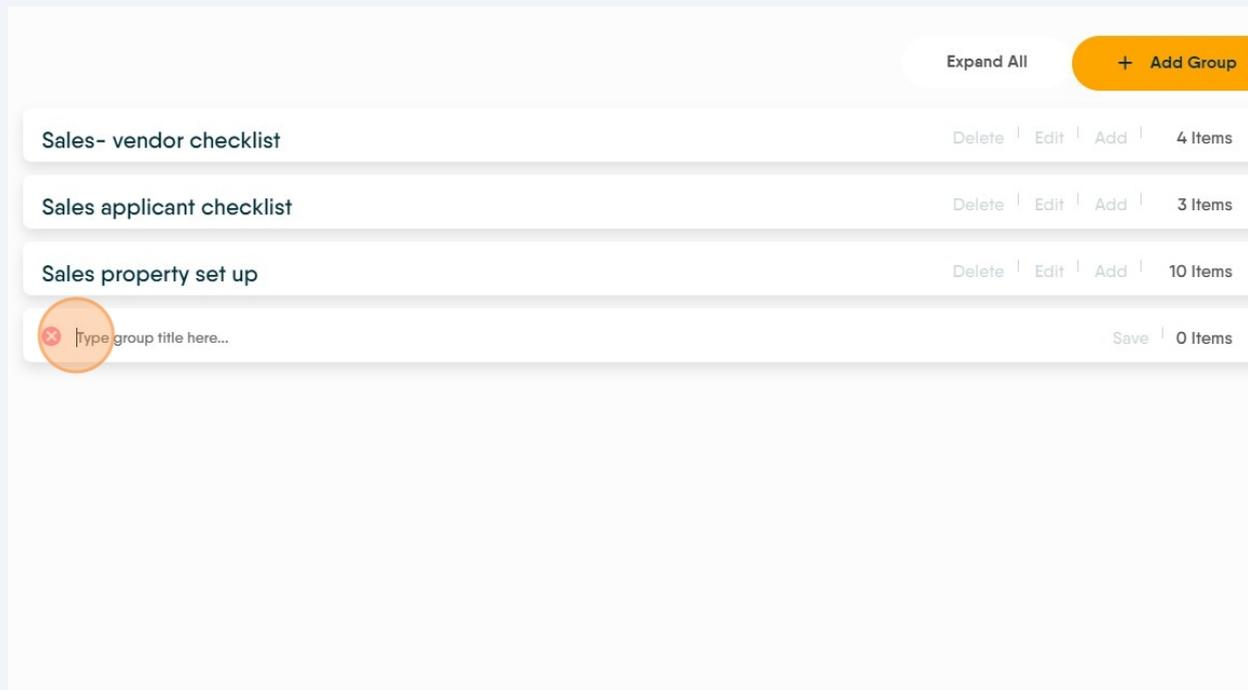
6 Click "Sales Property" or whatever checklist type you are creating. The checklist will only show in the area it is created for e.g. Sales Property only shows in a Sales Property.

The screenshot shows the same settings interface as in step 5, but with the 'Sales Property' menu item in the sidebar highlighted with an orange circle. The main content area now shows different settings sections. The top section has two toggle switches: 'SMS' (checked) and 'Third Party' (unchecked). The middle section is titled 'Applicant matching defaults' and contains one toggle switch: 'Matching Area' (checked). The bottom section is titled 'Landlord portal' and contains one toggle switch: 'Restrict Landlord Portal' (unchecked).

7 To add a NEW checklist, click "Add Group"



8 Click the "Type group title here..." field. Add the name of your checklist.



9

Click "Save" This will then create and name the empty checklist, to add the individual checklist items.

The screenshot shows a checklist management interface. At the top right, there are two buttons: "Expand All" and "+ Add Group". Below these are four checklist entries, each with a title, a set of actions (Delete, Edit, Add), and a count of items. The first three entries are "Sales- vendor checklist" (4 items), "Sales applicant checklist" (3 items), and "Sales property set up" (10 items). The fourth entry is a new checklist titled "Name the checklist" with 0 items. The "Save" button for this new checklist is circled in orange. The interface is clean and modern, with a light gray background and white cards for each checklist entry.

10

Click "Add" you will then have a line to add the first checklist item to. Add the subject to that line and then save and move on. Click "Add" to add the next line...

This screenshot shows the same checklist management interface as the previous one, but with the "Add" button for the "Name the checklist" entry circled in orange. The "Add" button is highlighted, indicating that the user should click it to add a new item to the checklist. The other elements of the interface, including the "Expand All" and "+ Add Group" buttons and the other checklist entries, remain the same.

Expand All + Add Group

- Sales- vendor checklist Delete | Edit | Add | 4 Items
- Sales applicant checklist Delete | Edit | Add | 3 Items
- Sales property set up Delete | Edit | Add | 10 Items
- Name the checklist Delete | Edit | Add | 2 Items

Active Add the checklist item to here. =

Active type here =

Active | [Save] [Delete] =

11 Then click the save icon to save the item

Lettings applicant checklist

Expand All + Add Group

- New applicant setup Delete | Edit | Add | 6 Items
- New checklist Delete | Edit | Add | 0 Items
- New applicant follow up Delete | Edit | Add | 3 Items

Active Updated ID =

Active Renewal docs =

Active Update Tenancy Record [Save] [Delete] =

## Editing the Checklist

## 12 Click "Edit"

The screenshot shows the 'Lettings applicant checklist' page in a web application. The page has a top navigation bar with 'My day', 'Lettings', 'Sales', 'Accounts', 'Reporting', and 'Communications'. A search bar and 'My account' button are on the right. The main content area is titled 'Lettings applicant checklist' and contains three expandable sections: 'New applicant setup' (6 items), 'New checklist' (0 items), and 'New Applicant Follow up' (3 items). The 'New Applicant Follow up' section is expanded, showing three items: 'Updated ID', 'Renewal docs', and 'Update Tenancy Record'. Each item has an 'Active' toggle and an equals sign. The 'Edit' button in the 'New checklist' section is highlighted with an orange circle.

## 13 Click here.

This screenshot is similar to the previous one, showing the 'Lettings applicant checklist' page. The 'New Applicant Follow up' section is expanded, showing three items: 'Updated ID', 'Renewal docs', and 'Update Tenancy Record'. In this view, the 'Edit' icon (a pencil) in the 'Renewal docs' row is highlighted with an orange circle.

14 Click here.

The screenshot shows a web interface titled "Lettings applicant checklist". On the left is a sidebar with a search bar and a list of items. The main content area has a header with "Expand All" and "+ Add Group" buttons. Below are three expandable sections: "New applicant setup" (6 items), "New checklist" (0 items), and "New applicant follow up" (3 items). The "New applicant follow up" section is expanded, showing three items: "Updated ID", "Renewal docs", and "Update Tenancy Record". Each item has an "Active" toggle. The "Renewal docs" item has a lock icon, a trash icon, and an equals sign icon, all of which are circled in orange.

15 Click "Edit"

This screenshot shows the same "Lettings applicant checklist" interface but with a different set of actions. The "New Checklist" section is expanded, and the "Save" button is circled in orange. The "New Applicant Follow up" section is also expanded, showing the same three items as in the previous screenshot. The "Update Tenancy Record" item now has a lock icon, a trash icon, and an equals sign icon, which are also circled in orange.

# 16 Click "Save"

Control Centre > Configuration > Lettings Applicant Checklist

## Lettings applicant checklist

Expand All + Add Group

- New applicant setup Delete | Edit | Add | 6 Items
- New Checklist Delete | Save | Add | 0 Items
- New Applicant Follow up Delete | Save | Add | 3 Items

<input checked="" type="checkbox"/> Active	Updated ID	=
<input checked="" type="checkbox"/> Active	Renewal docs	=
<input checked="" type="checkbox"/> Active	Update Tenancy Record	  =