

# Creating a Task in CRM

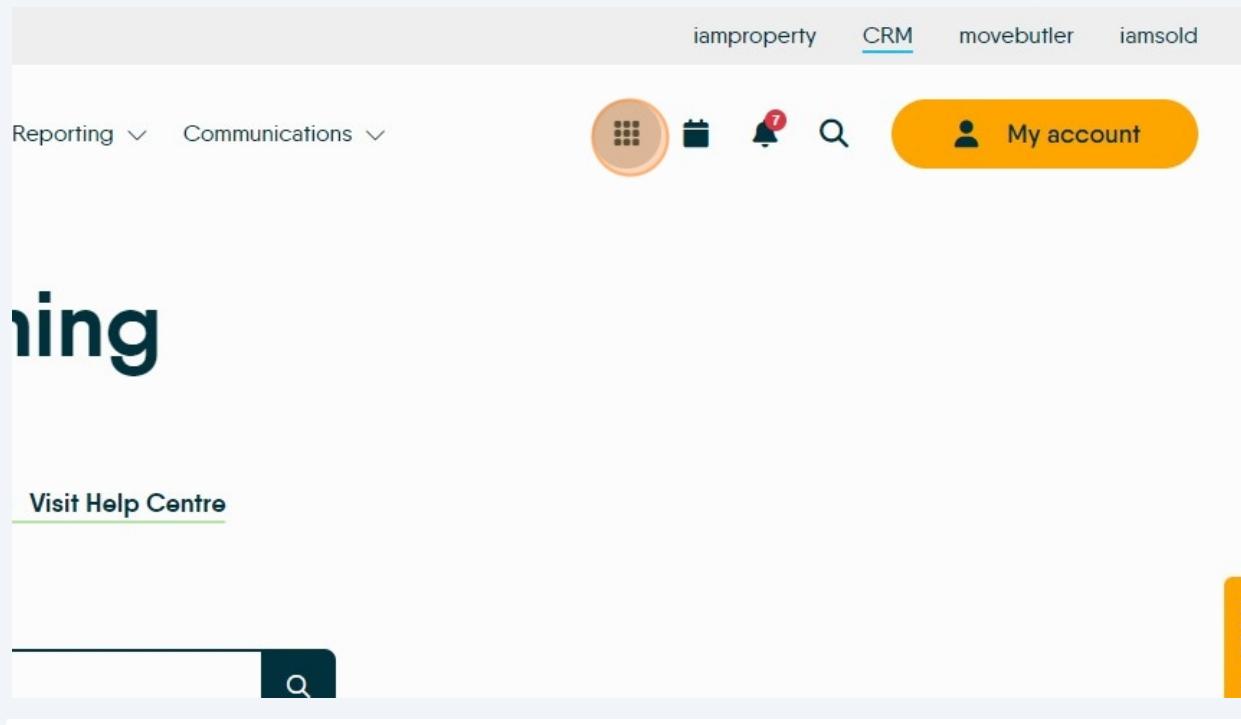


This guide provides a straightforward approach to creating tasks in the CRM system, ensuring users can efficiently manage their responsibilities.

By following the clear steps outlined, individuals can enhance their productivity and streamline workflow by creating or sharing tasks for themselves or colleagues. It is particularly useful for those new to the system or looking to optimise their task management process.

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

**2** Click Bento menu aka Rubics cube  
Click "Tasks"

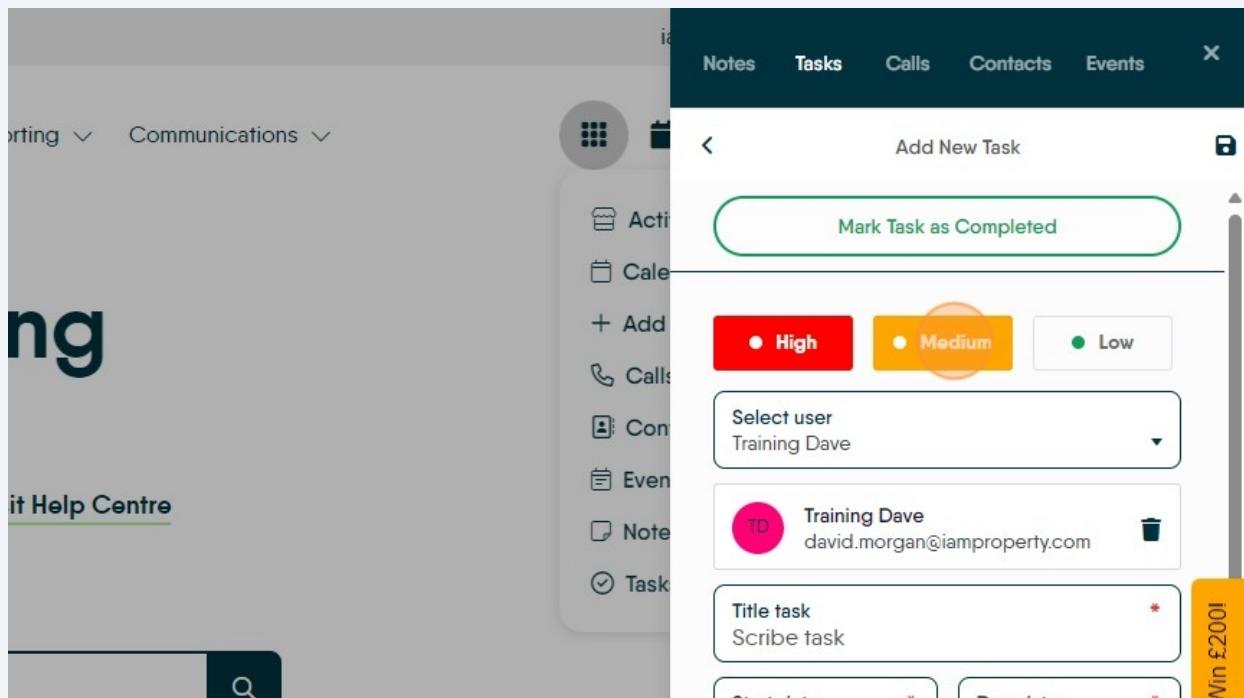


The screenshot shows a CRM software interface. On the left, there is a sidebar with a search bar and a 'Help Centre' link. The main area has a navigation bar with 'Calendar', 'Calls', 'Contacts', 'Events', 'Notes', and 'Tasks'. The 'Tasks' option is highlighted with an orange circle. Below the navigation is a search bar with a magnifying glass icon. The main content area has a header with 'Status', 'Name', 'Priority', 'Start date', and 'Due date'. To the right, there is a vertical sidebar with a 'Win £200!' button.

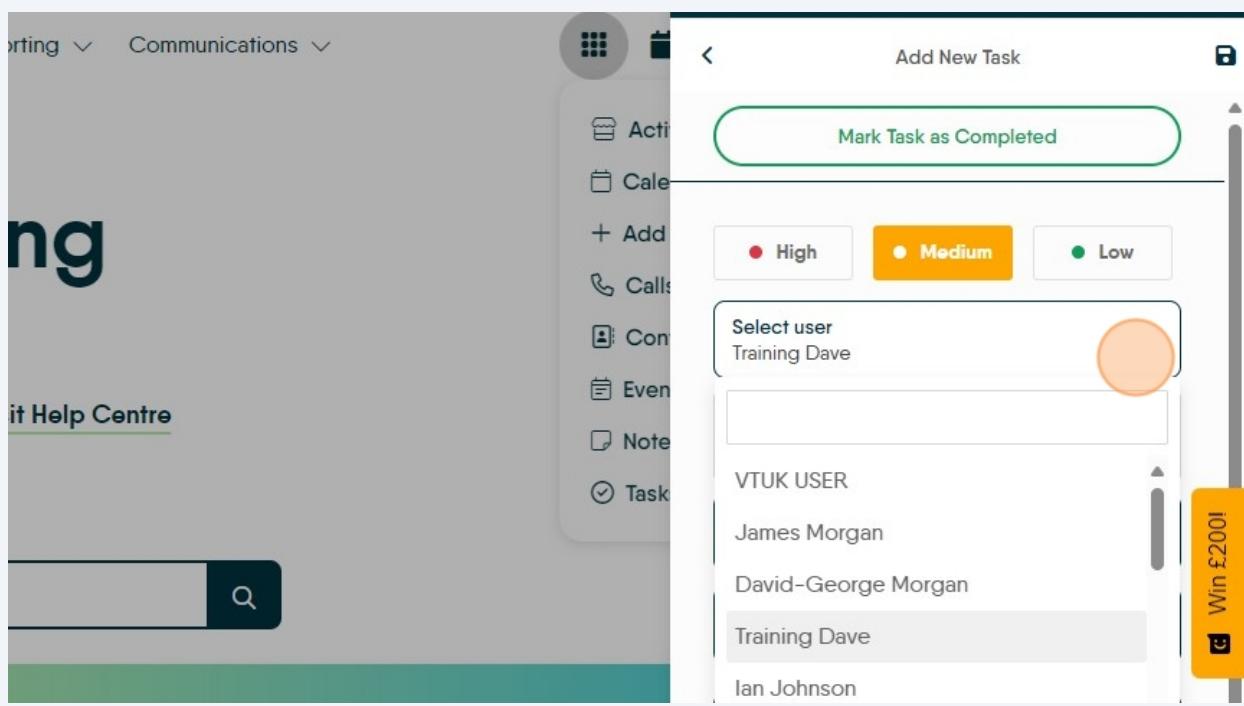
3 Click on the + to create a new Task

The screenshot shows the 'Tasks' module of the CRM software. The interface includes a navigation bar with 'Notes', 'Tasks', 'Calls', 'Contacts', and 'Events'. A message 'You have 4 tasks' is displayed. The tasks are listed in three categories: 'Overdue' (2 tasks), 'Today' (1 task), and 'Completed' (1 task). The 'Overdue' section contains tasks for 'Call Landlord re property' (due 09/10/2024) and 'Call vendor for elton' (due 18/10/2024). The 'Today' section contains a task for 'Call Landlord'. The 'Completed' section contains a task for 'call landlord re documents' (due 15/11/2024). A large orange circle highlights the '+' button in the top right corner of the task list.

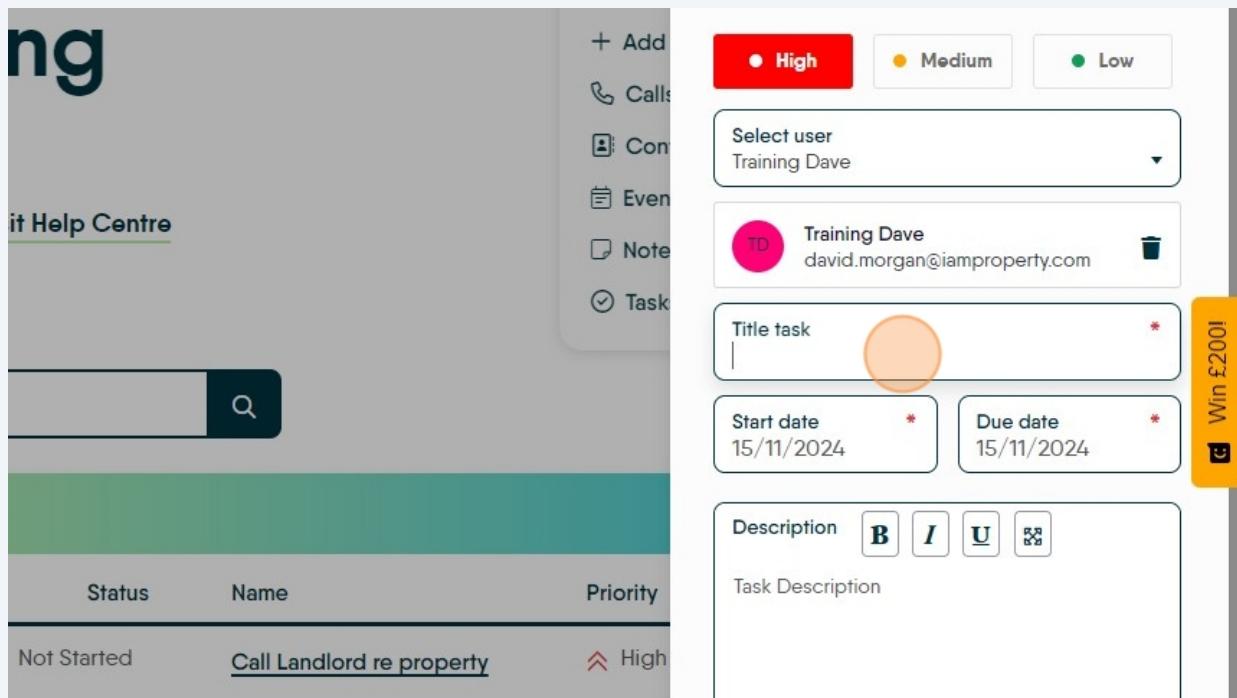
4 Set a priority for the task ( this is not required)



5 Select a Negotiator to assign the task to.

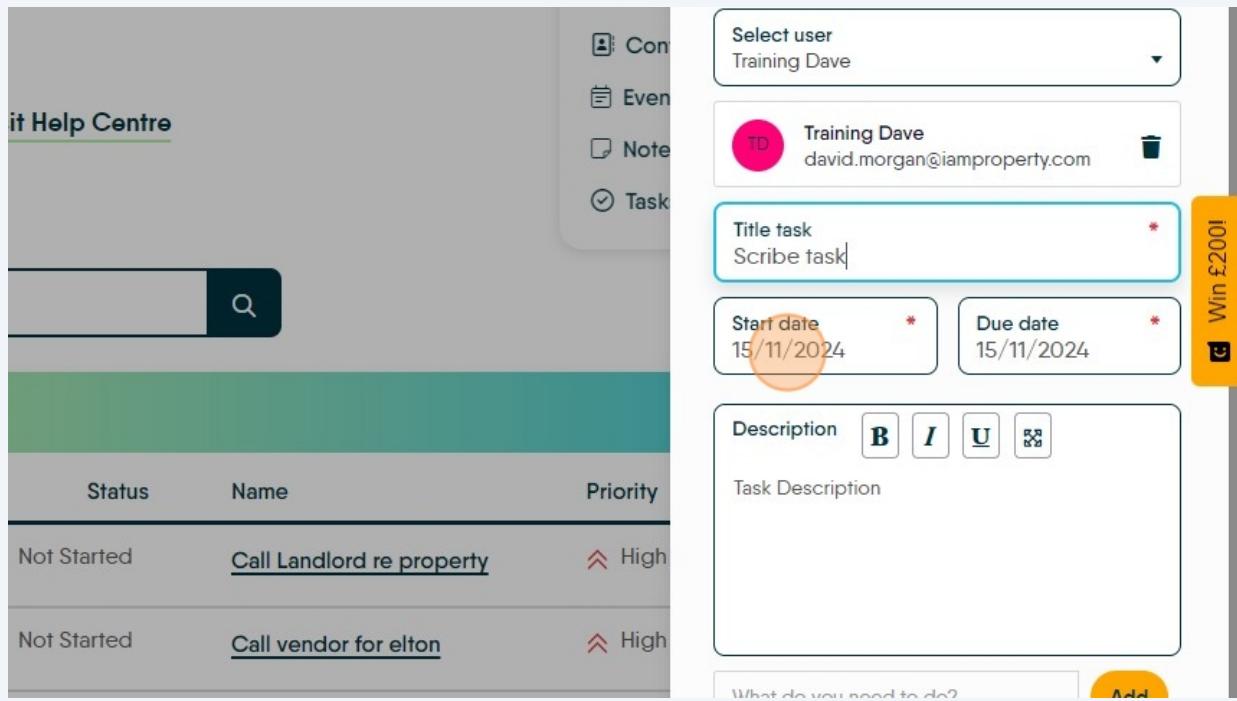


6 Click this text field and name the task



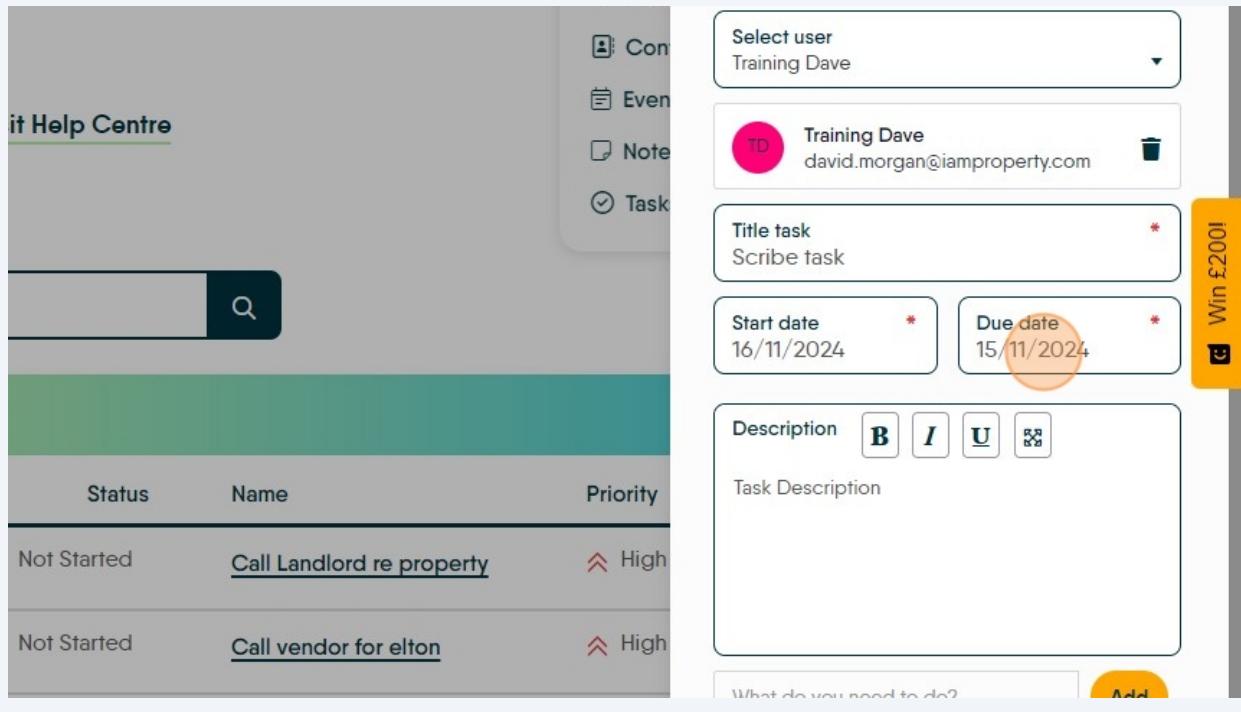
The screenshot shows a task creation form. At the top, there are priority buttons: 'High' (selected), 'Medium', and 'Low'. Below that is a dropdown for 'Select user' with 'Training Dave' selected. The 'Title task' field is highlighted with an orange circle, containing the text 'Call Landlord re property'. The 'Start date' field shows '15/11/2024'. The 'Due date' field also shows '15/11/2024'. The 'Description' section contains the text 'Task Description'. A sidebar on the right says 'Win £200!'. At the bottom, a table lists tasks: 'Not Started' with 'Call Landlord re property' and 'Priority High'.

7 Click to add a start date to your task, this can be off in the future or today as required.



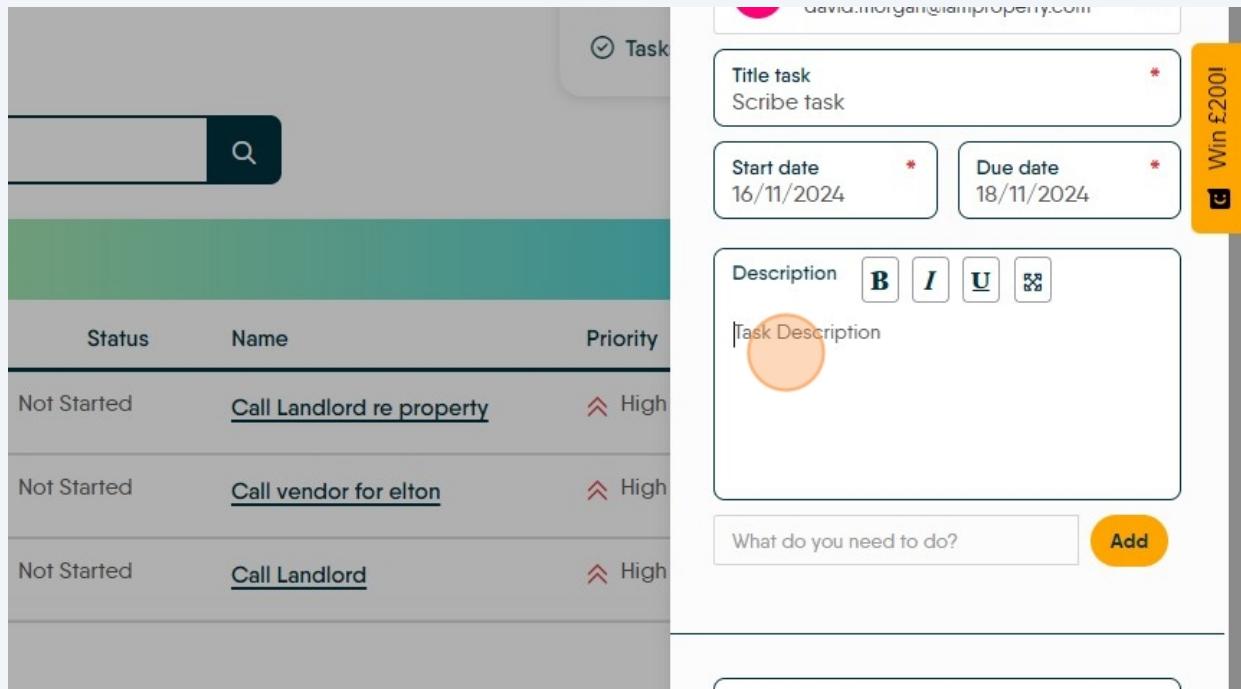
The screenshot shows a task creation form. The 'Title task' field is highlighted with an orange circle, containing the text 'Scribe task'. The 'Start date' field shows '15/11/2024'. The 'Due date' field shows '15/11/2024'. The 'Description' section contains the text 'Task Description'. A sidebar on the right says 'Win £200!'. At the bottom, a table lists tasks: 'Not Started' with 'Call Landlord re property' and 'Priority High', and another task with 'Call vendor for elton' and 'Priority High'.

8 Click here to set the due date. This is the date the task is due to be completed by.



The screenshot shows a task management application interface. On the left, there is a sidebar with 'Help Centre' and a search bar. The main area has a table with columns: Status, Name, and Priority. Two tasks are listed: 'Not Started' with 'Call Landlord re property' and 'High' priority, and 'Not Started' with 'Call vendor for elton' and 'High' priority. On the right, a 'Task' form is open. It includes fields for 'Select user' (set to 'Training Dave'), 'Title task' ('Scribe task'), 'Start date' ('16/11/2024'), 'Due date' ('15/11/2024'), 'Description' (with rich text buttons B, I, U, and a code icon), and a 'Task Description' text area. A yellow sidebar on the right says 'Win £200!'. At the bottom, there is a 'What do you need to do?' input field and a yellow 'Add' button.

9 Click here to add your description of the task, what needs to be done etc.. be as descriptive as possible in case a colleague needs to pick up the task.



The screenshot shows the same task management application interface as the previous one, but with a different focus. The 'Task Description' field in the 'Task' form is highlighted with a red circle. The rest of the interface is identical to the previous screenshot, showing the sidebar, the table of tasks, and the yellow sidebar on the right.

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Click here to add any steps that need to be performed to complete the task. The task can be accessed and a step ticked off, then the task saved until complete.

The screenshot shows a task management interface. On the left, a list of tasks is displayed with columns for Status, Name, and Priority. Three tasks are listed: 'Not Started' with 'Call Landlord re property' and 'High' priority; 'Not Started' with 'Call vendor for elton' and 'High' priority; and 'Not Started' with 'Call Landlord' and 'High' priority. On the right, a detailed task editor is open for the first task. It includes fields for 'Title task' (Scribe task), 'Start date' (16/11/2024), 'Due date' (18/11/2024), and a 'Description' section with rich text tools. Below the description is a text input field 'What do you need to do?' with an 'Add' button. At the bottom right of the editor is a 'Select record' button.

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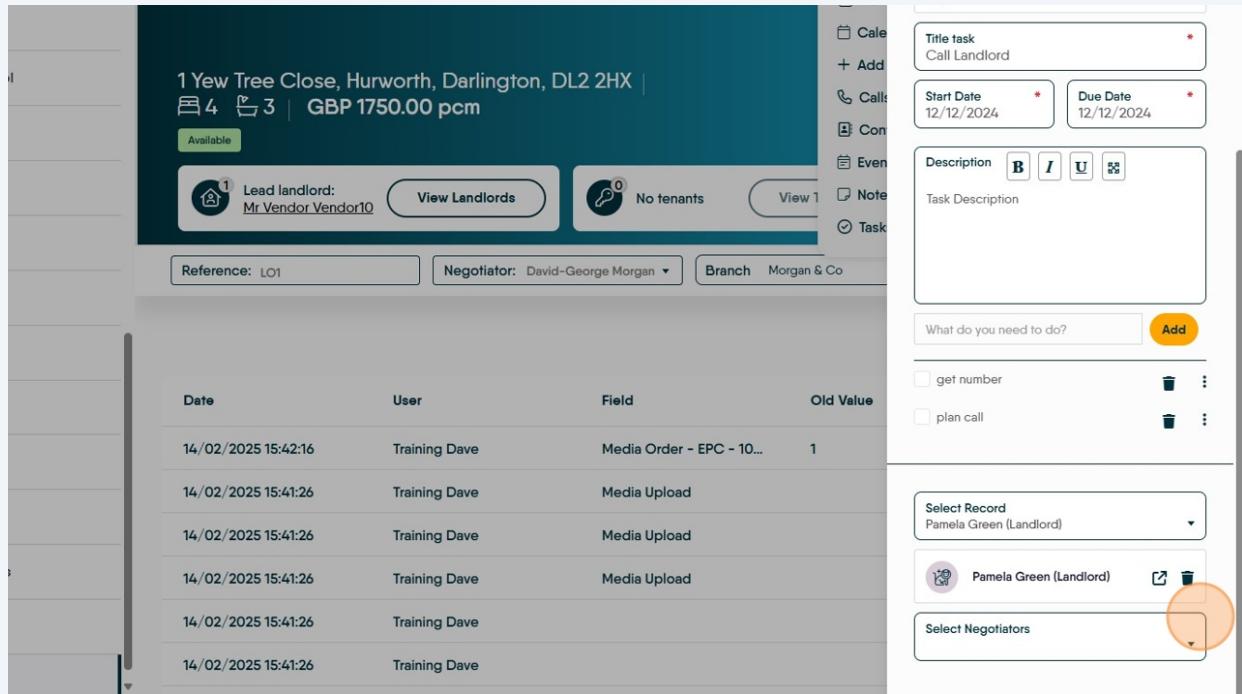
Click here to add a Property or Person record to link to the Task.

This allows you to link the task to a record in the CRM and have that task linked in the Journal as incomplete/complete task.

The screenshot shows a property record for '1 Yew Tree Close, Hurworth, Darlington, DL2 2HX'. The record includes details like '4 beds', '3 baths', and 'GBP 1750.00 pcm'. It shows the 'Lead landlord' as 'Mr Vendor Vendor10'. The 'Task' section of the record is highlighted with an orange circle. A detailed task editor is open on the right, showing the task 'Call Landlord' with 'Start Date' (12/12/2024) and 'Due Date' (12/12/2024). The 'Description' section is empty. Below the description is a 'What do you need to do?' input field with an 'Add' button. The 'Select Record' section shows 'Pamela Green (Landlord)' selected. The 'Select Negotiators' section is also visible.

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Click here to add additional negotiators to the task. This allows a Manager to track performance on a task or to allow there to be multiple negotiators working on the same task.



The screenshot shows a property management software interface. On the left, a property detail card for '1 Yew Tree Close, Hurworth, Darlington, DL2 2HX' is displayed, showing 4 bedrooms, 3 bathrooms, and a price of GBP 1750.00 pcm. It indicates the property is available and has 1 lead landlord, Mr. Vendor Vendor10. On the right, a 'Task' creation dialog is open. The 'Title task' field contains 'Call Landlord'. The 'Start Date' is set to 12/12/2024 and the 'Due Date' is 12/12/2024. The 'Description' field contains 'Task Description'. Below the task form, a list of actions is shown: 'get number' and 'plan call'. At the bottom, there are dropdowns for 'Select Record' (Pamela Green (Landlord)) and 'Select Negotiators' (with a highlighted dropdown arrow). A table at the bottom shows a history of changes made by 'Training Dave' on 14/02/2025 at 15:42:16, including Media Order, Media Upload, and Media Upload.

| Date                | User          | Field                     | Old Value |
|---------------------|---------------|---------------------------|-----------|
| 14/02/2025 15:42:16 | Training Dave | Media Order - EPC - 10... | 1         |
| 14/02/2025 15:41:26 | Training Dave | Media Upload              |           |
| 14/02/2025 15:41:26 | Training Dave | Media Upload              |           |
| 14/02/2025 15:41:26 | Training Dave | Media Upload              |           |
| 14/02/2025 15:41:26 | Training Dave |                           |           |
| 14/02/2025 15:41:26 | Training Dave |                           |           |

Once complete, click the Save button and the task will be created. All the Negotiators linked to the task will be notified and the task will show in their task lists and their Activity list when it meets the timescales set in the config for Activity list.