

Creating a Task in CRM

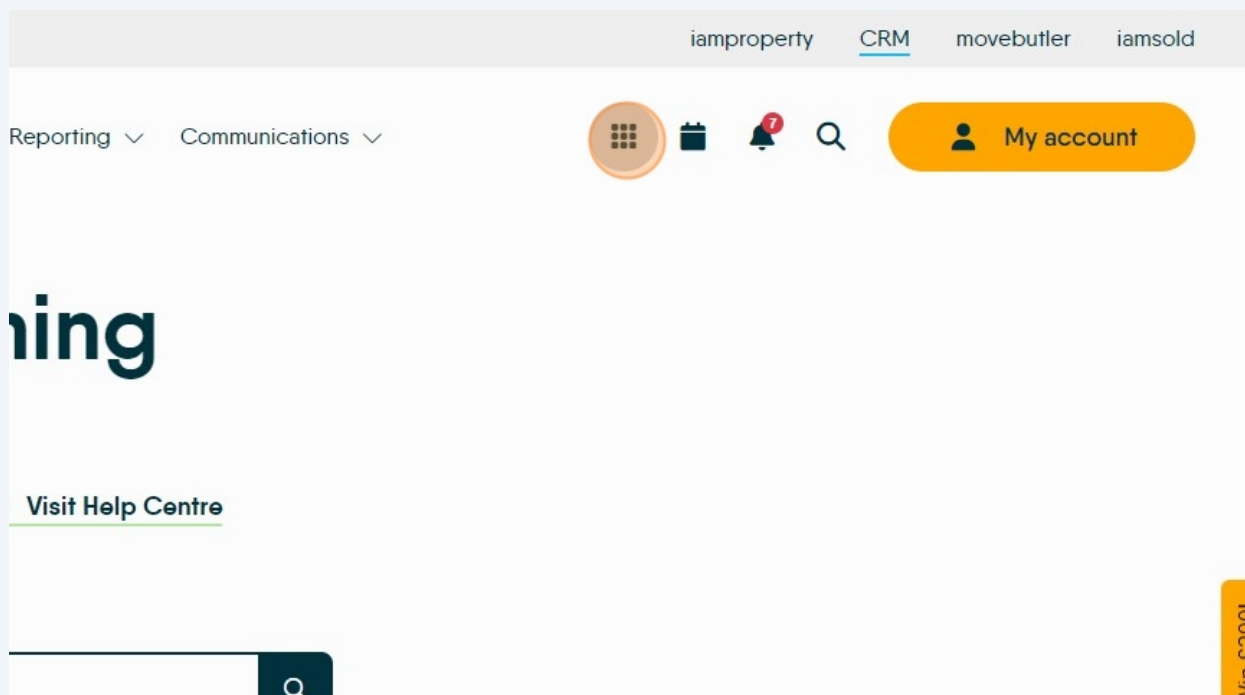


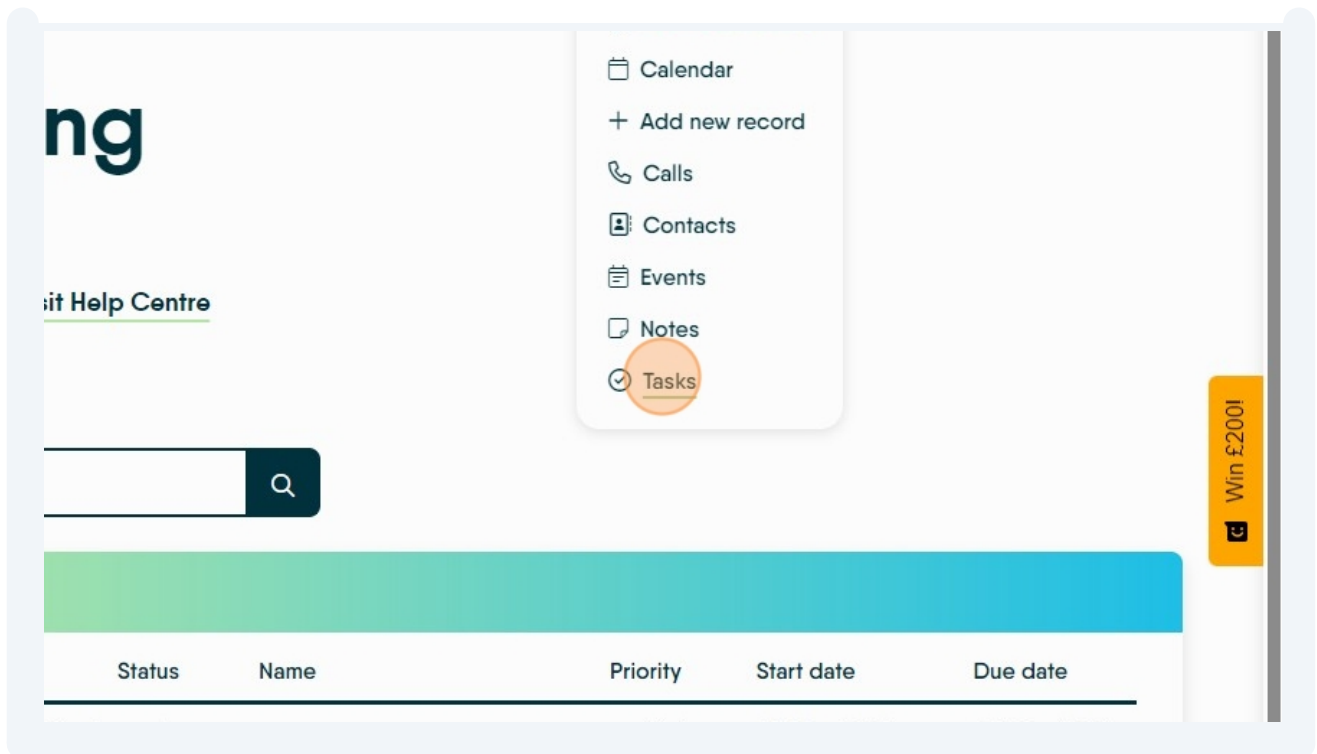
This guide provides a straightforward approach to creating tasks in the CRM system, ensuring users can efficiently manage their responsibilities.

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.

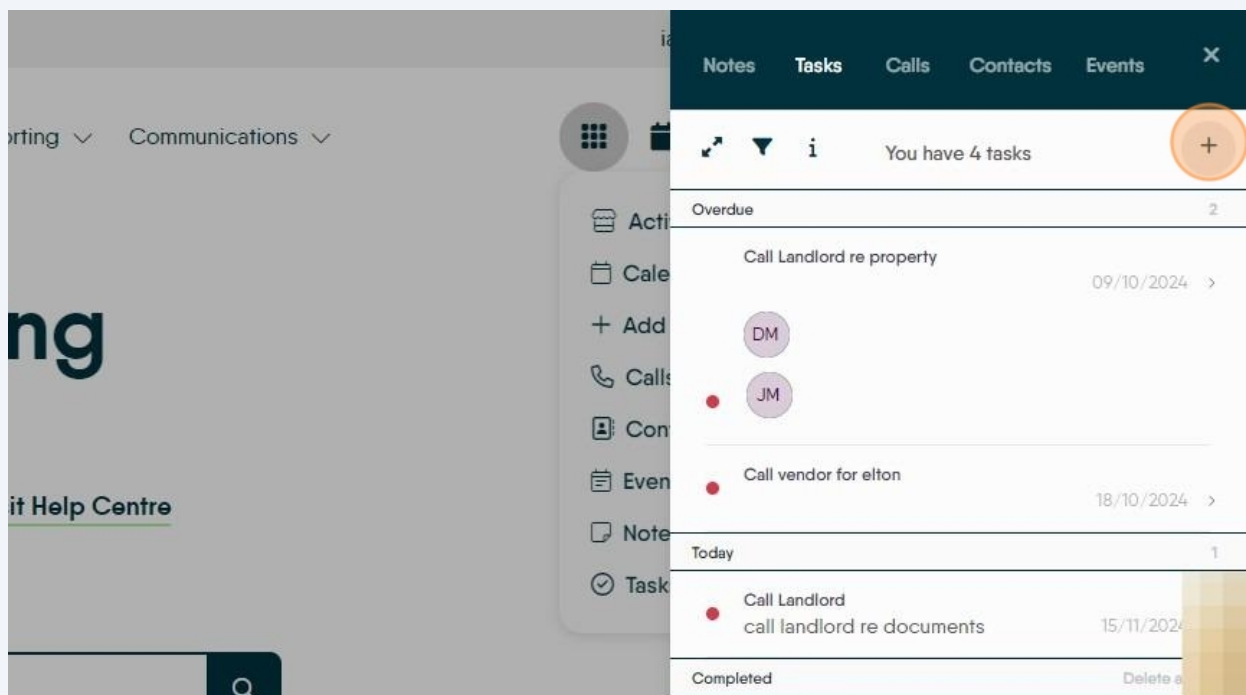
- 1 Navigate to <https://crm.iamproperty.com/MyDay>

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





3 Click on the + to create a new Task



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

Notes Tasks Calls Contacts Events X

< Add New Task >

Mark Task as Completed

High Medium Low

Select user
Training Dave

Training Dave
david.morgan@iamproperty.com

Title task
Scribe task

Win £200!

5 Select a Negotiator to assign the task to.

< Add New Task >

Mark Task as Completed

High Medium Low

Select user
Training Dave

VTUK USER
James Morgan
David-George Morgan
Training Dave
Ian Johnson

Win £200!

6 Click this text field and name the task

The screenshot shows a task management interface. On the left, a sidebar contains a search bar and a table with columns: Status, Name, and Priority. The table has two rows: 'Not Started' with 'Call Landlord re property' (High priority) and 'Not Started' with 'Call vendor for elton' (High priority). The main area on the right is a task form. It includes a priority selector (High, Medium, Low) with 'High' selected. A 'Select user' dropdown shows 'Training Dave'. Below this, a user card for 'Training Dave' (david.morgan@iamproperty.com) is visible. The 'Title task' field is highlighted with an orange circle. The 'Start date' and 'Due date' fields both show '15/11/2024'. The 'Description' field has formatting options (B, I, U, link) and the text 'Task Description'. A yellow banner on the right edge says 'Win £200!'.

Status	Name	Priority
Not Started	<u>Call Landlord re property</u>	High
Not Started	<u>Call vendor for elton</u>	High

Task Form Fields:

- Priority: High (selected), Medium, Low
- Select user: Training Dave
- User: Training Dave (david.morgan@iamproperty.com)
- Title task: [highlighted]
- Start date: 15/11/2024
- Due date: 15/11/2024
- Description: Task Description

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

This screenshot shows the same task management interface as before, but with updates. The 'Title task' field now contains the text 'Scribe task'. The 'Start date' field is highlighted with an orange circle. The table in the sidebar now includes a third row: 'Not Started' with 'Call vendor for elton' (High priority). The task form fields remain the same as in the previous step.

Status	Name	Priority
Not Started	<u>Call Landlord re property</u>	High
Not Started	<u>Call vendor for elton</u>	High

Task Form Fields:

- Priority: High (selected), Medium, Low
- Select user: Training Dave
- User: Training Dave (david.morgan@iamproperty.com)
- Title task: Scribe task
- Start date: 15/11/2024 (highlighted)
- Due date: 15/11/2024
- Description: Task Description

- 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 interface. On the left, there is a sidebar with a search bar and a table of tasks. The table has columns for Status, Name, and Priority. The tasks listed are 'Call Landlord re property' and 'Call vendor for elton', both with a status of 'Not Started' and a priority of 'High'. On the right, there is a task form. The form includes a 'Select user' dropdown menu set to 'Training Dave', a 'Title task' field set to 'Scribe task', a 'Start date' field set to '16/11/2024', and a 'Due date' field set to '15/11/2024'. The 'Due date' field is highlighted with an orange circle. Below the date fields is a 'Description' field with a placeholder 'Task Description' and a text area for adding more details. At the bottom right, there is a yellow banner that says 'Win £200!'.

Status	Name	Priority
Not Started	<u>Call Landlord re property</u>	High
Not Started	<u>Call vendor for elton</u>	High

Task form fields:

- Select user: Training Dave
- Title task: Scribe task
- Start date: 16/11/2024
- Due date: 15/11/2024
- Description: Task Description

- 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 interface as before, but with the 'Due date' field changed to '18/11/2024'. The 'Description' field is now highlighted with an orange circle. The task form fields are:

- Select user: Training Dave
- Title task: Scribe task
- Start date: 16/11/2024
- Due date: 18/11/2024
- Description: Task Description

The table on the left now includes a third task: 'Call Landlord' with a status of 'Not Started' and a priority of 'High'.

Status	Name	Priority
Not Started	<u>Call Landlord re property</u>	High
Not Started	<u>Call vendor for elton</u>	High
Not Started	<u>Call Landlord</u>	High

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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 table lists tasks with columns for Status, Name, and Priority. On the right, a form allows adding steps to a task.

Status	Name	Priority
Not Started	<u>Call Landlord re property</u>	High
Not Started	<u>Call vendor for elton</u>	High
Not Started	<u>Call Landlord</u>	High

Form fields on the right:

- Title task: Scribe task
- Start date: 16/11/2024
- Due date: 18/11/2024
- Description: Task Description
- What do you need to do?: (Text input field)
- Add: (Yellow button)

A yellow banner on the right edge says "Win £200!".

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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 CRM interface. On the left, a property record is displayed. On the right, a task form is shown with a 'Select Record' dropdown menu.

Property Record (Left):

- Address: 1 Yew Tree Close, Hurworth, Darlington, DL2 2HX
- Phone: 4, Fax: 3, Price: GBP 1750.00 pcm
- Status: Available
- Lead landlord: Mr Vendor Vendor10
- No tenants
- Reference: LO1
- Negotiator: David-George Morgan
- Branch: Morgan & Co

Task Form (Right):

- Title task: Call Landlord
- Start Date: 12/12/2024
- Due Date: 12/12/2024
- Description: Task Description
- What do you need to do?: (Text input field)
- Add: (Yellow button)
- Select Record: Pamela Green (Landlord)
- Select Negotiators: (Dropdown menu)

A yellow banner on the right edge says "Win £200!".

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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 task management interface. The main task details include:

- Address:** 1 Yew Tree Close, Hurworth, Darlington, DL2 2HX
- Value:** GBP 1750.00 pcm
- Status:** Available
- Lead landlord:** Mr Vendor Vendor10
- No tenants:** 0
- Reference:** LO1
- Negotiator:** David-George Morgan
- Branch:** Morgan & Co

The task description is "Call Landlord". The "Start Date" is 12/12/2024 and the "Due Date" is 12/12/2024. The "Description" field contains "Task Description".

The "What do you need to do?" section has two items:

- ☐ get number
- ☐ plan call

The "Select Record" dropdown shows "Pamela Green (Landlord)". The "Select Negotiators" dropdown is highlighted with an orange circle, indicating where to click to add additional negotiators.

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.