

Client - Navigating Dynamic Agent - Operations Dashboard



Learn how to manage and modify user access settings for staff members within your Dynamic Agent dashboard. This guide provides a clear walkthrough for adjusting operational roles and dashboard visibility for your team.



Alert! If you do not have sufficient user permissions it is possible you will not see the options to change user profiles.

This guide assumes you have full permissions to manage and configure Dynamic Agent.

There are some sections of this guide that are controlled by Dynamic Agent Support - Users and Branch Config, these settings will be discussed as part of the Client Onboarding process and setup by Dynamic Agent Support.

1 Navigate to <https://dynamic-agent.co.uk/>

The screenshot displays the Dynamic Agent Operations Dashboard. The interface includes a sidebar with navigation options: Dashboard, ActivityPanel, Branches, Commission, Operations, and Add... The main content area is titled 'Overall Companywide Standings' and is divided into three sections: Listings, Sales, and Exchanges. Each section features a circular gauge chart showing Gross, Net, and Target values, alongside a table of key metrics. The 'Key metrics at-a-glance' section provides a grid of 12 data points. At the bottom, a 'Top performers in the last 7 days' section shows a list of staff members with their roles and performance metrics.

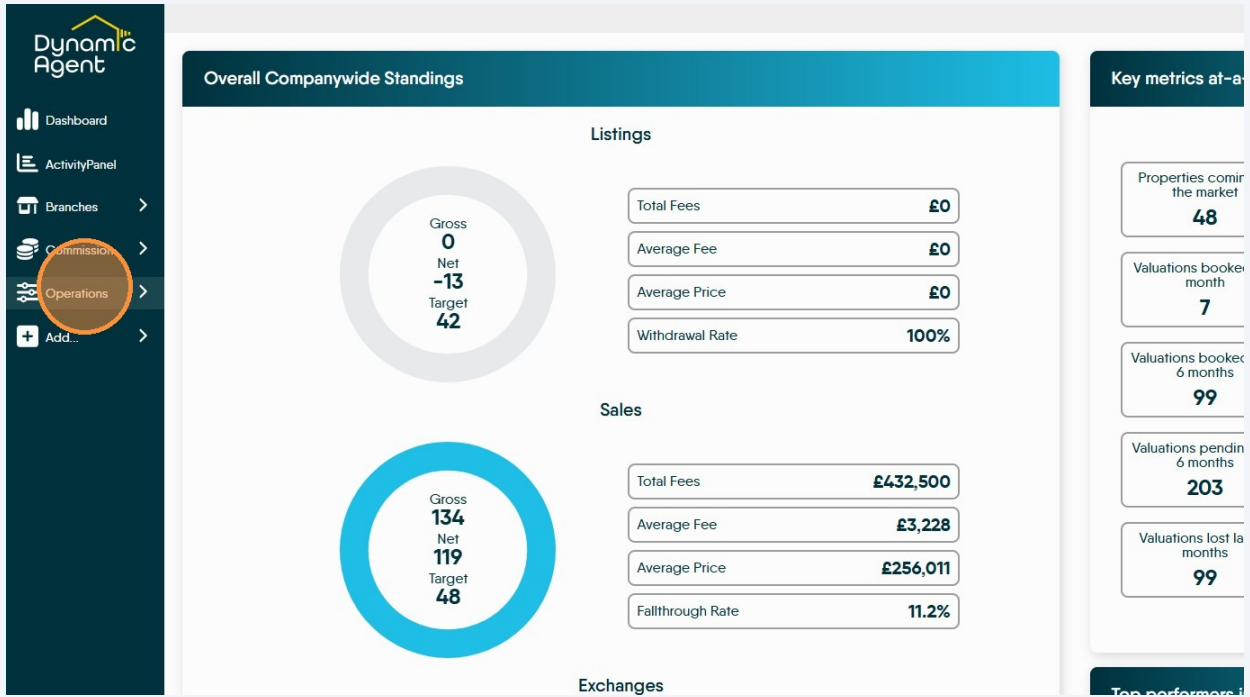
Category	Total Fees	Average Fee	Average Price	Withdrawal Rate
Listings	£0	£0	£0	100%
Sales	£432,500	£3,228	£256,011	11.2%

Metric	Value
Properties coming to the market	48
Properties with pending offers	26
Predicted to exchange this month	41
Valuations booked this month	7
New applicants last 7 days	0
Price changes this month	0
Valuations booked next 6 months	99
Viewings awaiting feedback last 14 days	0
Vendors with no recent contact	0
Valuations pending last 6 months	203
Applicants with no recent contact	1202
Properties put on notice	6
Valuations test last 12 months	99
Sales calls made this month	0
Progress journal + 1 week	399

Staff Member	Role	Appraisals	Listings	Viewings	Sales	Exchanges	Legals	Mortgages
Kyle Black	Sale	7	0	177	134	0	0	0

2

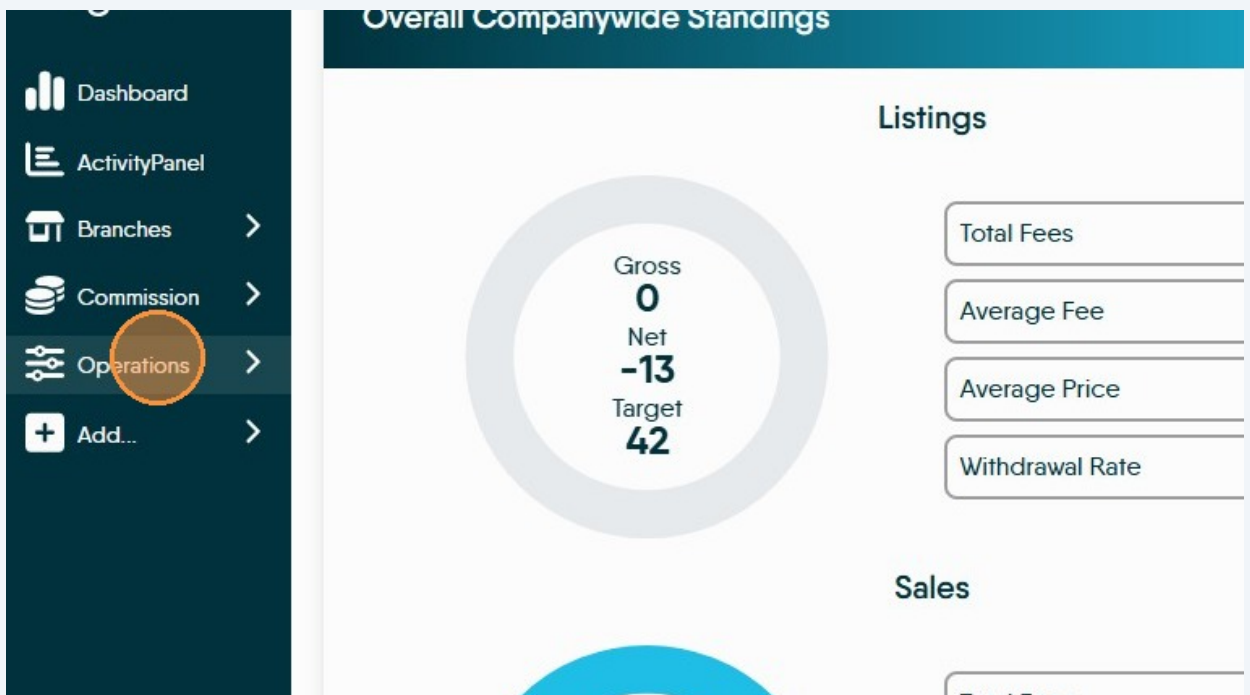
Click "**Operations**" in the side menu. This menu allows various items to be updated within Dynamic Agent such as adding Users, Branches etc.



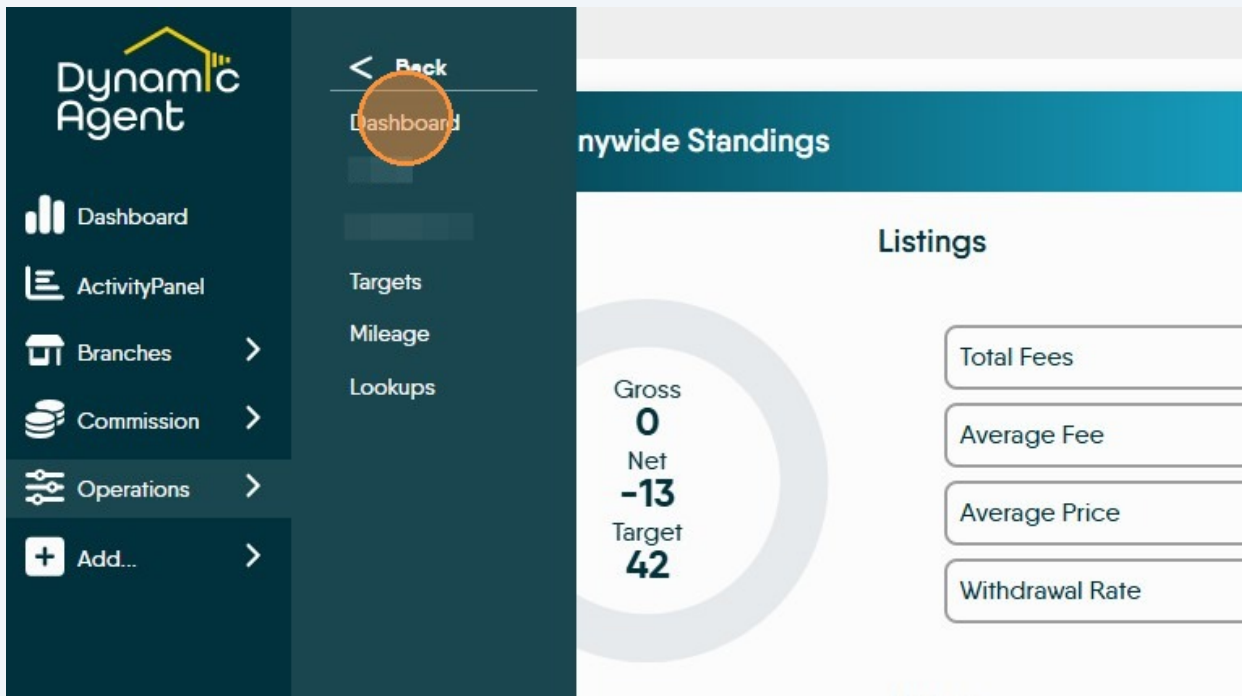
Operations Dashboard

3

Click "**Operations**"



4 Click "Dashboard"



Alert! The **Users** and **Branches** sections are only available to Support Level Users and have been redacted on this screen. For changes please raise a support request.

5 Basic Config.

6

Click "**Basic Config**" in this screen the URL for where your properties are displayed can be added. Along with the URL of your CRM.

Negotiator Points Threshold is the point where staff start to earn commission. Points are set to be earned per activity e.g. Sale. Once this target is reached then commission is earned by the staff member.

Negotiator Applicant Management this allows a minimum/maximum number of Applicants a negotiator can handle, ensuring a high quality service. Outside of these thresholds the Negotiator will show red in the Applicants list.

Mileage form configuration for employees claiming mileage for either a personal or business use vehicle and are set by you. Advisory figures are available from HMRC. The threshold is the point the mileage rate drops, for example using a personal car for business use after 10000 miles the rate drops from 45p per mile to 25p per mile.

The screenshot displays the 'Agent' software configuration interface. On the left is a dark sidebar with a menu containing: Dashboard, ActivityPanel, Branches, Commission, Operations, and Add... A question mark icon and a user profile icon are at the bottom of the sidebar. The main content area is divided into three tabs: 'Basic configuration' (active), 'Journal configuration', and 'Modules and features'. The 'Basic configuration' tab contains the following sections:

- Basic configuration**: General configuration options that will rarely need to be changed. Includes a text input field for 'Negotiator Points Threshold*'. Below this is a section for 'Negotiator applicant management' with instructions: 'Specify the minimum and maximum thresholds for number of applicants managed per negotiator. Outside of these thresholds, the negotiator will appear red in the list.' It features two input fields: 'Minimum*' (containing '20') and 'Maximum*' (containing '100').
- Mileage form configuration**: Includes three input fields for 'Mileage Pence up to threshold*', 'Mileage Pence over threshold*', and 'Mileage Threshold*'. A yellow 'Save' button is located at the bottom right of this section.

7

"Journal Configuration" allows you to set which journal types trigger the "last contacted" date for the Applicant, Vendor/Property and Progressions Journals. To do this, specify a comma separated list of Journal IDs (there is a list available from the screen). To trigger this on any journal type, enter "all".

Journal configuration

Journal types to trigger contact updates

Pick which journal types that trigger the "last contacted" date for the below entities. To this, specify a comma separated list of Journal IDs (click here to see a list of possibilities). To trigger this on any journal type, enter "all".

Applicant Journal IDs* Property Journal IDs (Vendor)*

Sales Progress Journal IDs*

Contact threshold highlighting (in weeks)

Applicants* Vendors* Sales Progress*

Save

This section is available to Dynamic Agent Support Only

8

The **"Mobile Logo"**, **"Desktop Logo"** and **"Login Photo"** allow you to add your company logo for the web and mobile Dynamic Agent logins. Also add a personal image for the login.

Mobile Logo

The mobile logo is displayed on a white background, top centre, on screen sizes below 960px. Use a standard PNG logo.

Drag and drop, or tap here

Desktop Logo

The desktop logo is shown at the top left hand corner on screen sizes of 960px and above. This needs to be a transparent PNG, ideally the white variant of the logo.

Drag and drop, or tap here

Login Photo

You may choose an appropriate photo to override the default "river" photo shown on the login and forgot password screens. This enables a degree of personalisation.

Drag and drop, or tap here

Michael Watson 150 Avon Crescent, Overthorpe

Sale Banbury 30th Mar at 9:38am

0 listings 134 sales 0 exchanges 1 legals 0 mortgages May 2026

Targets

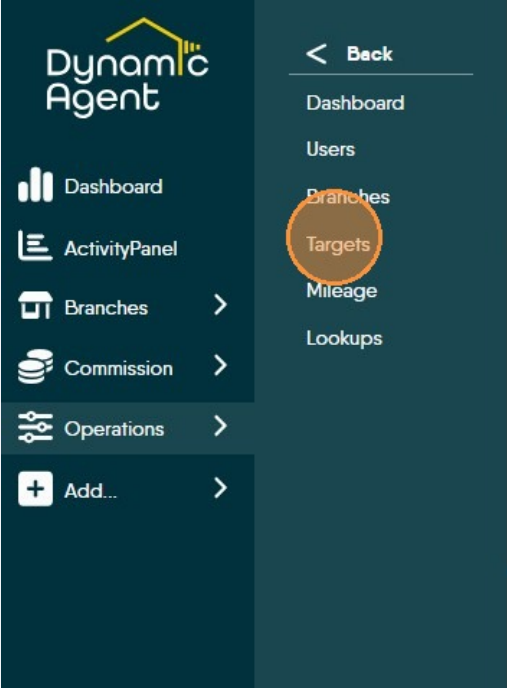
9 Available to any user with suitable permissions.

10 Click "Operations"

The screenshot shows a dark navigation sidebar on the left with the following items: Dashboard, ActivityPanel, Branches, Commission, Operations (highlighted with an orange circle), and Add... To the right of the sidebar is a secondary menu with the items: Targets, Mileage, and Lookups. The main content area displays a table with the following data:

	Identifier	Postcodes
y	AYL	HP19, HP20,
y	BAN	OX15, OX16,
	DID	OX10, OX
	OXF	OX1, OX2, OX:

11 Click "Targets"



The screenshot shows the Dynamic Agent application interface. On the left is a dark sidebar with the 'Dynamic Agent' logo at the top. Below the logo are several menu items: 'Dashboard', 'ActivityPanel', 'Branches', 'Commission', 'Operations', and 'Add...'. A secondary menu is open, listing 'Back', 'Dashboard', 'Users', 'Branches', 'Targets', 'Mileage', and 'Lookups'. The 'Targets' item is highlighted with an orange circle. The main content area on the right shows a table with columns 'Identifier' and 'Postcodes'. The table contains three rows of data:

Identifier	Postcodes
AYL	HP19, HP20, HP21
BAN	OX15, OX16, OX17
DID	OX10, OX11

12 This screen allows you to set targets for each metric, on a per-role or per-user basis. Start by specifying default targets for each role; and these can be altered on an individual basis if you have a part-time member of staff.

The default targets you create are then used in the monthly Target Matrix. You then have the option of setting precise targets for particular months, in line with your expected staffing and business processes. If you do not do this, then the default targets will be used for every month.

Targets are used to display progress charts in the companywide, branch and individual statistics; and also in the various higher level reports.

13

Target Matrix allows you to select a branch and set a monthly target that is default for Valuer, Negotiator or Individual users; this is then the target moving forward.

Target Matrix

Change branch

Change month

This will auto-populate once you have set default targets below, and will auto-calculate the branch target for each metric. You can make a change to any target and it will recalculate. Once you are happy with the targets for a given month, click Save (default targets save automatically).

If you have a higher target in mind but do not want to increase individual targets, use the Balance option to increase your branch target.

Targets for selected month

		List.	Sale	Exch.	Instr.	Lgl.	Mort.	With.	Canx	Disin.
TOTAL		0	0	0	0	0	0	0	0	0
Sofia Richards	Manager	0	0	0	0	0	0	0	0	0
Daniel Vaughan	Valuer	0	0	0	0	0	0	0	0	0
Michael Tucker	Valuer	0	0	0	0	0	0	0	0	0
Alexander Lambert	Negotiator	0	0	0	0	0	0	0	0	0
Emily O'Brien	Negotiator	0	0	0	0	0	0	0	0	0
Erin Kirk	Negotiator	0	0	0	0	0	0	0	0	0
Henry Greenwood	Negotiator	0	0	0	0	0	0	0	0	0
BALANCE		0	0	0	0	0	0	0	0	0

14

This screen is where you can set all the targets for each of the user types. If required individual user targets can be added as required.

Default Targets - Valuer

If you add a new valuer to the system they will automatically be assigned the below targets

Listings	<input type="text" value="0"/>
Sales	<input type="text" value="0"/>
Exchanges	<input type="text" value="0"/>
Instructions	<input type="text" value="0"/>
Legals	<input type="text" value="0"/>
Mortgages	<input type="text" value="0"/>
Withdrawals	<input type="text" value="0"/>
Cancellations	<input type="text" value="0"/>
Disinstructions	<input type="text" value="0"/>

Default Targets - Negotiator

If you add a new negotiator to the system they will automatically be assigned the below targets

Listings	<input type="text" value="0"/>
Sales	<input type="text" value="0"/>
Exchanges	<input type="text" value="0"/>
Instructions	<input type="text" value="0"/>
Legals	<input type="text" value="0"/>
Mortgages	<input type="text" value="0"/>
Withdrawals	<input type="text" value="0"/>
Cancellations	<input type="text" value="0"/>
Disinstructions	<input type="text" value="0"/>

Default Targets - Individual

Use this if you want to set a different default target for a particular member of staff e.g. if they are part-time

Listings	<input type="text"/>
Sales	<input type="text"/>
Exchanges	<input type="text"/>
Instructions	<input type="text"/>
Legals	<input type="text"/>
Mortgages	<input type="text"/>
Withdrawals	<input type="text"/>
Cancellations	<input type="text"/>

15 Once set the targets will show in the **"Targets for the selected month"** screen.

The **'Total'** are shown at the top of the screen, showing the total number of (for example) Sales targeted for that month. If required, the figures can be edited on this screen and the totals will update.

The **Balance** option at the bottom of the screen allows additional targets to be set which are over and above the individual targets eg the 'Sale' column has a target of 25 for all the users and a 'Balance' of 300 making the total 325.

Change branch
Aylesbury

Change month
May 2026

This will auto-populate once you have set default targets below, and will auto-calculate the branch target for each metric. You can make a change to any target and it will recalculate. Once you are happy with the targets for a given month, click Save (default targets save automatically).

If you have a higher target in mind but do not want to increase individual targets, use the Balance option to increase your branch target.

	List.	Sale	Exch.	Instr.	Lgl.	Mort.	With.	Canx	Disin.
TOTAL	30	325	25	3	15	13	4	2	0
Brooke Rowley - Manager	10	0	0	0	0	0	0	0	0
Edward Davis - Valuer	20	0	0	0	0	4	4	0	0
Kyle Wood - Valuer	0	8	0	0	5	1	0	0	0
Amelia James - Negotiator	0	12	0	0	8	5	0	2	0
Benjamin Kemp - Negotiator	0	0	0	0	0	0	0	0	0
Jasmine Wells - Negotiator	0	5	0	3	2	1	0	0	0
Scarlett Stone - Negotiator	0	0	25	0	0	2	0	0	0
BALANCE	0	300	0	0	0	0	0	0	0

Save

Mileage

16 Available to any user with suitable permissions.

17 Click "Operations"

May 2026

This will auto-populate once you have set default targets below, and will auto-calculate the branch target for each metric. You can make a change to any target and it will recalculate. Once you are happy with the targets for a given month, click Save (default targets save automatically).

If you have a higher target in mind but do not want to increase individual targets, use the Balance option to increase your branch target.

Brooke Rowley	Manager
Edward Davis	Valuer
Kyle Wood	Valuer
Amelia James	Negotiator
Benjamin Kemp	Negotiator
Jasmine Wells	Negotiator

18 Click "Mileage"

Dynamic Agent

Dashboard

ActivityPanel

Branches

Commission

Operations

Add...

Back

Dashboard

Users

Branches

Targets

Mileage

Lookups

May 2026

TOTAL

Brooke Rowley	Manager
Edward Davis	Valuer
Kyle Wood	Valuer
Amelia James	Negotiator
Benjamin Kemp	Negotiator

19

Mileage Form Management this screen allows you to review mileage claims and give users the ability to claim mileage.

Mileage Form Management

Total
1

Submitted
0

No	Name	Mileage Group Code	Brought Forward	This Month	Total	Payable	Expenses	Uploads	Total Payout	Status	Last Updated	Checked?	
1	Jake Martin	Default	125.0	10.0	135	£0.00	0	0	£0.00	Pending	Wednesday 20th May at 2.32pm	<input type="checkbox"/>	+ Actions

<

1

>

Mileage Form Setup

This screen allows you to set up and review mileage forms.

To allow a member of staff to complete a mileage form, you must first grant them the "claim mileage" privilege through their user profile. They will then appear in the list, and then you should assign them an initial mileage figure. This will often be zero, but if you are migrating from another mileage

No	Name	Branch	Mileage Group Code	Total Forms	Initial Mileage	
1	Abigail Johnson	Warwick	Default	0	Not set up	+ Actions
2	Amber Smith	Banbury	Default	0	Not set up	+ Actions
3	Anthony Martin	Banbury	Default	0	Not set up	+ Actions
4	Brandon Roberts	Warwick	Default	0	Not set up	+ Actions
5	Brooke Rowley	Aylesbury	Default	0	Not set up	+ Actions
6	Daniel Vaughan	Oxford	Default	0	Not set up	+ Actions

20

The **Mileage Form Setup** screen. To claim mileage a user must be given permission to claim mileage in their User Profile. They will then appear in this list, once they show in this list click the '+Actions' button. If the User has 'Added' in their row they have been set up to claim mileage, if 'Not Setup' shows, they are not.

Mileage Form Setup

This screen allows you to set up and review mileage forms.

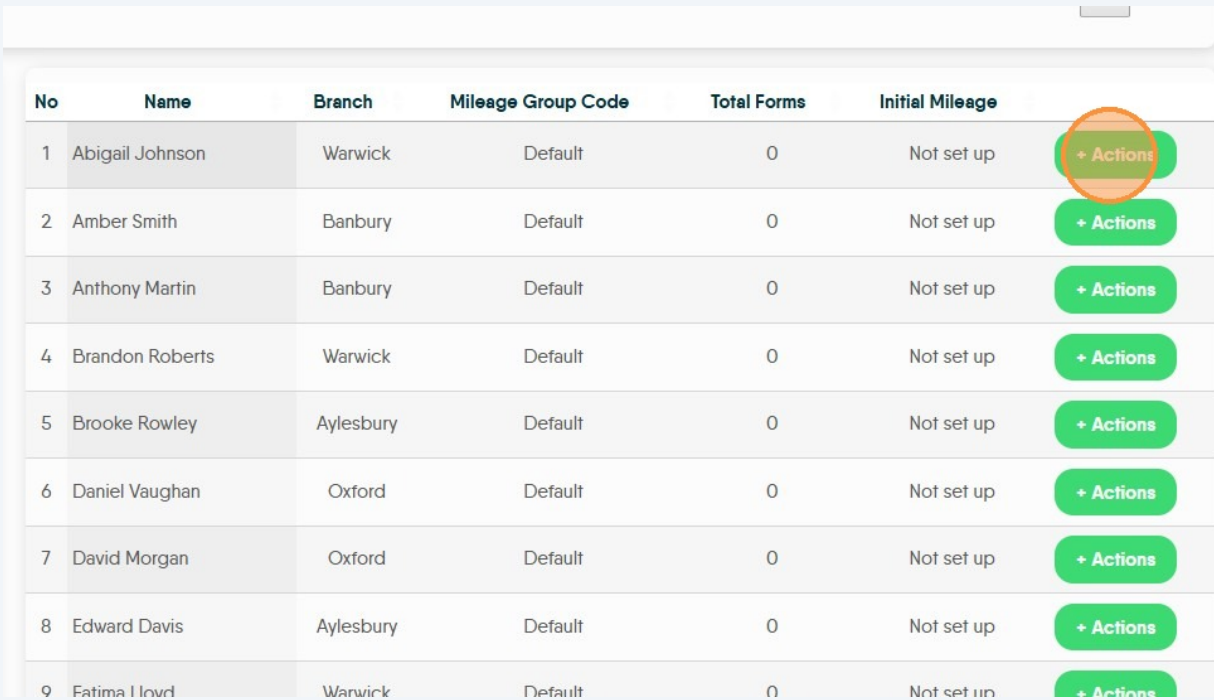
To allow a member of staff to complete a mileage form, you must first grant them the "claim mileage" privilege through their user profile. They will then appear in the list, and then you should assign them an initial mileage figure. This will often be zero, but if you are migrating from another mileage

No	Name	Branch	Mileage Group Code	Total Forms	Initial Mileage	
1	Abigail Johnson	Warwick	Default	0	Not set up	+ Actions
2	Amber Smith	Banbury	Default	0	Not set up	+ Actions
3	Anthony Martin	Banbury	Default	0	Not set up	+ Actions
4	Brandon Roberts	Warwick	Default	0	Not set up	+ Actions
5	Brooke Rowley	Aylesbury	Default	0	Not set up	+ Actions
6	Daniel Vaughan	Oxford	Default	0	Not set up	+ Actions
7	David Morgan	Oxford	Default	0	Not set up	+ Actions
8	Edward Davis	Aylesbury	Default	0	Not set up	+ Actions
9	Fatima Lloyd	Warwick	Default	0	Not set up	+ Actions
10	Jack O'Connor	Didcot	Default	0	Not set up	+ Actions
11	Jake Martin	Aylesbury	Default	1	Added	+ Actions

21

To set up/enable the user to claim mileage an initial starting mileage needs to be added. This helps to track the users business mileage for any thresholds they might hit. If you are moving from another platform this enables you to keep continuity of records.

Click "+ Actions"



No	Name	Branch	Mileage Group Code	Total Forms	Initial Mileage	
1	Abigail Johnson	Warwick	Default	0	Not set up	+ Actions
2	Amber Smith	Banbury	Default	0	Not set up	+ Actions
3	Anthony Martin	Banbury	Default	0	Not set up	+ Actions
4	Brandon Roberts	Warwick	Default	0	Not set up	+ Actions
5	Brooke Rowley	Aylesbury	Default	0	Not set up	+ Actions
6	Daniel Vaughan	Oxford	Default	0	Not set up	+ Actions
7	David Morgan	Oxford	Default	0	Not set up	+ Actions
8	Edward Davis	Aylesbury	Default	0	Not set up	+ Actions
9	Fatima I Lovel	Warwick	Default	0	Not set up	+ Actions

22

Complete the option shown on screen, if applicable. To set initial mileage, click this text field and add the initial mileage. This will most likely be 0 to start

Click "Save"

There will now be a number 1 in the Forms column.

Name	Branch	Mileage Group Code	Total Forms	Initial Mileage	
Assign group code	Default	First mileage month	May 2026	Set initial mileage	Hide
			<input type="text" value="0"/>	Save	
nith	Banbury	Default	0	Not set up	+ Actions
Martin	Banbury	Default	0	Not set up	+ Actions
Roberts	Warwick	Default	0	Not set up	+ Actions
Rowley	Aylesbury	Default	0	Not set up	+ Actions
Roughan	Oxford	Default	0	Not set up	+ Actions
Morgan	Oxford	Default	0	Not set up	+ Actions
Javis	Aylesbury	Default	0	Not set up	+ Actions

Name	Branch	Mileage Group Code	Total Forms	Initial Mileage	
Assign group code	Default	First mileage month	May 2026	Set initial mileage	Hide
			<input type="text" value="0"/>	Save	
Smith	Banbury	Default	0	Not set up	+ Actions
My Martin	Banbury	Default	0	Not set up	+ Actions
n Roberts	Warwick	Default	0	Not set up	+ Actions
Rowley	Aylesbury	Default	0	Not set up	+ Actions
Roughan	Oxford	Default	0	Not set up	+ Actions
Morgan	Oxford	Default	0	Not set up	+ Actions

< 1 >

Name	Branch	Mileage Group Code	Total Forms	Initial Mileage	
Rigail Johnson	Warwick	Default	1	Added	+ Actions
Robert Smith	Banbury	Default	0	Not set up	+ Actions
Anthony Martin	Banbury	Default	0	Not set up	+ Actions
Brandon Roberts	Warwick	Default	0	Not set up	+ Actions
Bob Rowley	Aylesbury	Default	0	Not set up	+ Actions
Daniel Vaughan	Oxford	Default	0	Not set up	+ Actions
David Morgan	Oxford	Default	0	Not set up	+ Actions

23 To review a mileage form. Click **" +Actions"**

Submitted
0

Total	Payable	Expenses	Uploads	Total Payout	Status	Last Updated	Checked?	
0	£0.00	0	0	£0.00	Not started	Friday 22nd May at 1.46pm	<input type="checkbox"/>	+ Actions
135	£0.00	0	0	£0.00	Pending	Wednesday 20th May at 2.32pm	<input type="checkbox"/>	+ Actions

< 1 >

Name	Branch	Mileage Group Code	Total Forms	Initial Mileage	
Johnson	Warwick	Default	1	Added	+ Actions
Smith	Banbury	Default	0	Not set up	+ Actions

24

Click **"View form"** This will show the mileage form and allow you to review all the entries for mileage and if enabled expenses, including any receipts uploaded.

This is not where the mileage form is approved from.

Total	Payable	Expenses	Uploads	Total Payout	Status	Last Updated	Checked?	
0	£0.00	0	0	£0.00	Not started	Friday 22nd May at 1.46pm	<input type="checkbox"/>	+ Actions
								View form
								Edit form on behalf
								Hide

Name	Branch	Mileage Group Code	Total Forms	Initial Mileage	
Johnson	Warwick	Default	1	Added	+ Actions
Smith	Banbury	Default	0	Not set up	+ Actions

25

Click **"Edit form on behalf"** to edit the form for the User.

This allows you to add mileage to a users form, as well as adding expenses.

Mileage Form Management

Total 2 Submitted 0

No	Name	Mileage Group Code	Brought Forward	This Month	Total	Payable	Expenses	Uploads	Total Payout	Status	Last Updated	Checked?	
1	Abigail Johnson	Default	0.0	0.0	0	£0.00	0	0	£0.00	Not started	Friday 22nd May at 1.46pm	<input type="checkbox"/>	+ Actions
												View form	
												Edit form on behalf	
												Hide	

Mileage Form Setup

This screen allows you to set up and review mileage forms.

To allow a member of staff to complete a mileage form, you must first grant them the "claim mileage" privilege through their user profile. They will then appear in the list and then you should

No	Name	Branch	Mileage Group Code	Total Forms	Initial Mileage	
1	Abigail Johnson	Warwick	Default	1	Added	+ Actions
2	Amber Smith	Banbury	Default	0	Not set up	+ Actions
3	Anthony Martin	Banbury	Default	0	Not set up	+ Actions
4	Brandon Roberts	Warwick	Default	0	Not set up	+ Actions

26

The form shows any mileage brought forward, total this month so far and total.

To add a mileage claim, click into the journey details and add your journey, add the mileage to the 'Miles' field. Add 1 leg of the trip per line. Click the "Journey Details (one location per line)" field.

Jake Martin's mileage form for May 2026

Date Miles

Journey Details (one location per line)

Open Google Maps (0 locations added)

125 brought forward	£0.00 expenses	10 this month	£0.00 mileage	135 total
<input type="button" value="Show expenses (0)"/>		<input type="button" value="Show uploads (0)"/>		<input type="button" value="Finish and send"/>

Diary

Jake Martin's mileage form for May 2026

Date Miles

Journey Details (one location per line)

Open Google Maps (0 locations added)

125 brought forward	£0.00 expenses	10 this month	£0.00
<input type="button" value="Show expenses (0)"/>		<input type="button" value="Show uploads (0)"/>	

Diary

28

To claim 'Expenses' click '**Show Expenses**' this will show any expense currently claimed, this could be parking, coffee, milk etc it is not mileage.

To add an expense record

iamproperty crm movebutler iamsold [dynamicag](#)

ke Martin's mileage form for May 2026

te Miles

dd/mm/yyyy

ourney Details (one location per line)

en Google Maps (0 locations added)

125 brought forward 544 this month 669 total
£1.00 expenses £0.00 mileage

Diary

29

Click "**Show expenses**"

iamproperty crm movebutler iamsold [dynamicagent](#)

Martin's mileage form for May 2026

mm/yyyy Miles

ourney Details (one location per line)

oogle Maps (0 locations added)

125 brought forward 544 this month 669 total
£1.00 expenses £0.00 mileage

Diary

30

Add the details of the expense into the 'Details' field and the amount into the '£' field then click '**Add**'

tin's mileage form for May 2026

yyyy Miles

tails (one location per line)

gle Maps (0 locations added)

Add

Show your location picker

125 brought forward £1.00 expenses 544 this month £0.00 mileage 669 total

Hide expenses (1) Show uploads (0) Finish and send

Expenses (1)

If you have an expense to claim, add it here (scroll if you have lots of expenses).

(x) lunch - £1.00

Details... £ 0.00 ADD

Diary

31

To add receipts for expenses or mileage. Click "**Show uploads**" click into the field that shows and either drag and drop or search your device for the images. If you are using a mobile device, an option to use the camera will show. Click "Tap here to add your photos (or drag & drop)"

tin's mileage form for May 2026

yyyy Miles

tails (one location per line)

gle Maps (0 locations added)

Add

Show your location picker

iamproperty crm movebutler iamsold dynamicagent

125 brought forward £1.00 expenses 544 this month £0.00 mileage 669 total

Hide expenses (1) Show uploads (0) Finish and send

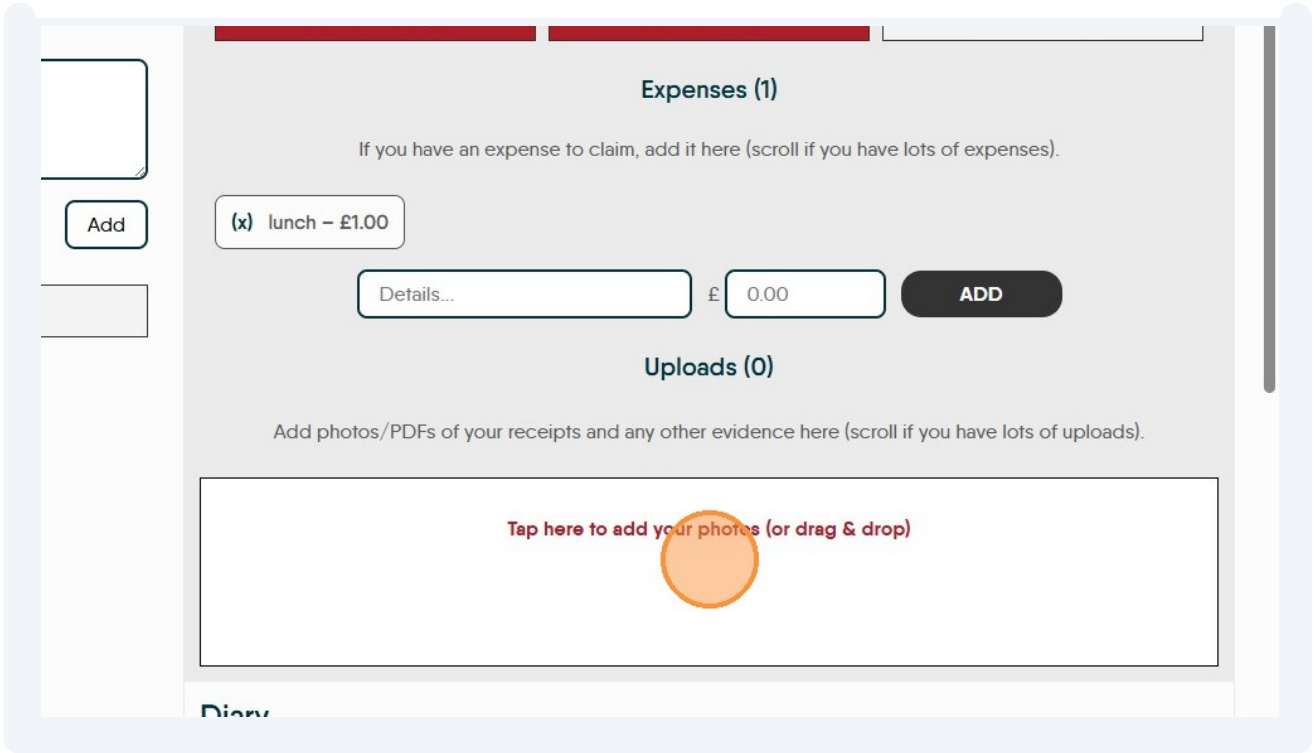
Expenses (1)

If you have an expense to claim, add it here (scroll if you have lots of expenses).

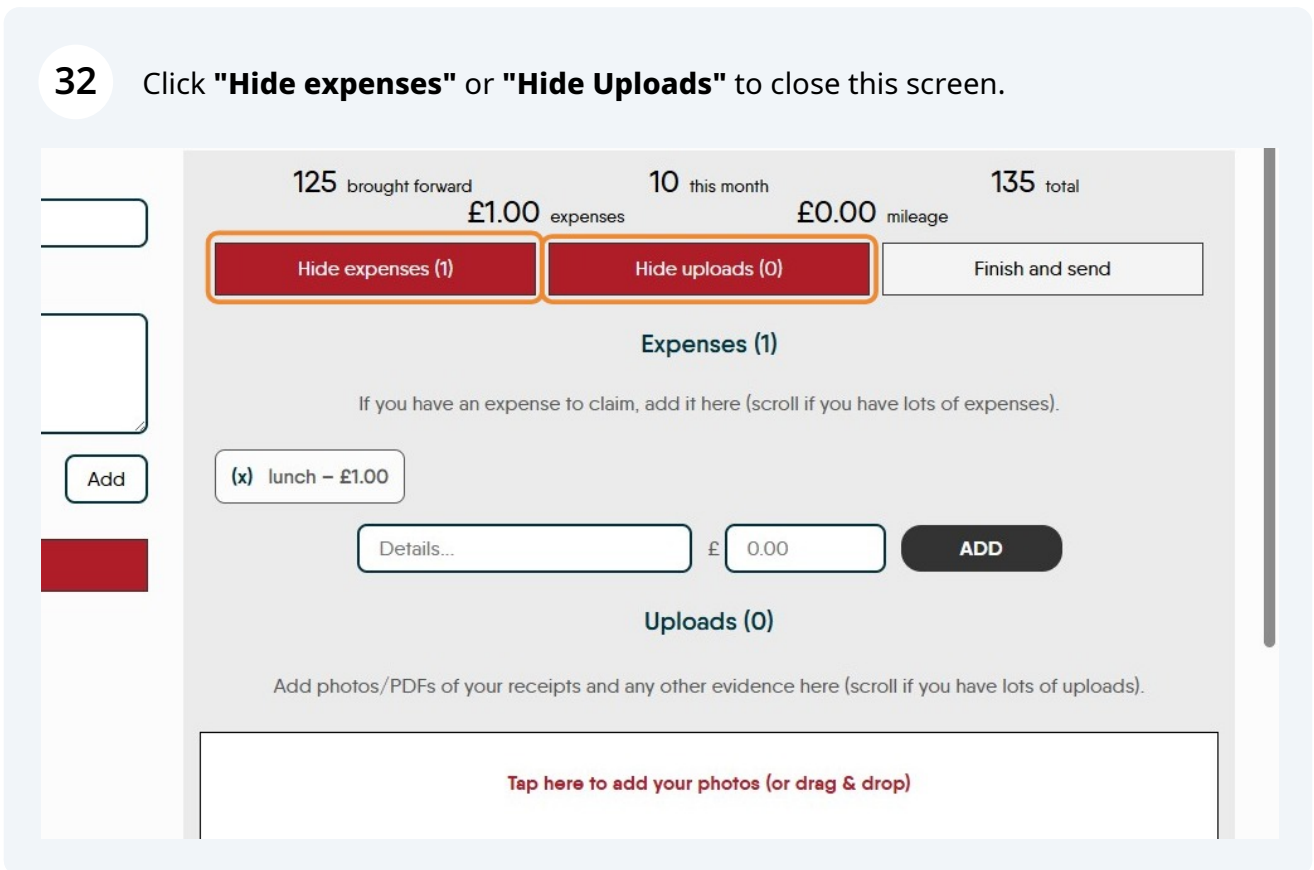
(x) lunch - £1.00

Details... £ 0.00 ADD

Diary



32 Click **"Hide expenses"** or **"Hide Uploads"** to close this screen.



33

If you need to complete and submit the expenses on behalf of your user. Click **"Finish and send"**

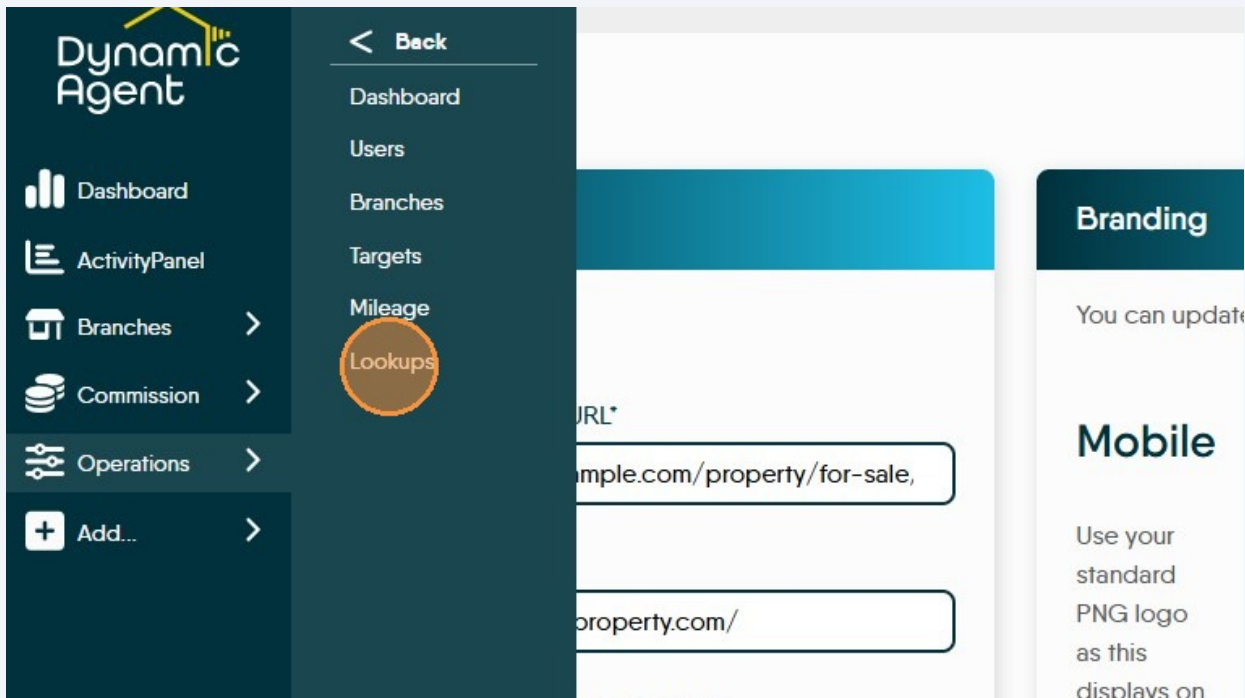
The screenshot shows a web interface for a mileage form. At the top right, there are navigation links: iamproperty, crm, movebutler, iamsold, and dynamicagent. The main heading is "tin's mileage form for May 2026". On the left, there are input fields for "Miles" (with a calendar icon) and "tails (one location per line)". Below that is a "Google Maps (0 locations added)" section with an "Add" button and a "Show your location picker" button. On the right, a summary box displays: "125 brought forward", "£1.00 expenses", "544 this month", "£0.00 mileage", and "669 total". Below this are three buttons: "Hide expenses (1)", "Hide uploads (0)", and "Finish and send" (which is circled in orange). Under "Expenses (1)", there is a list item "(x) lunch - £1.00" with a "Details..." button and a "£ 0.00" input field with an "ADD" button. Below that is the "Uploads (0)" section with a "Tap here to add your photos (or drag & drop)" instruction. At the bottom, there is a "Diary" section.

Lookups

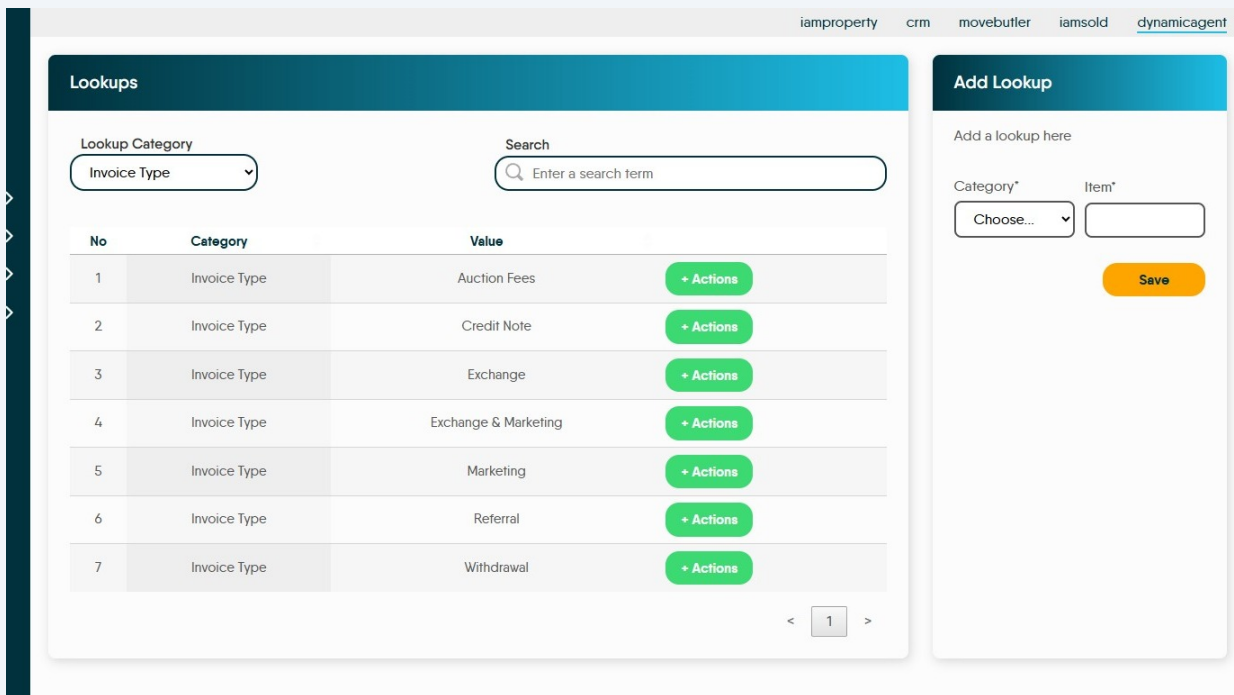
34

Available to any user with suitable permissions.

35 Click "Lookups"



36 This screen allows new 'Lookups' to be added



37

To review the Lookups that are already in Dynamic Agent. Click '**Lookup Category**' and from the drop down menu select the option e.g. 'Conveyancer'

There are 3 options Conveyancer, Mortgage Provider and Surveyor

Click "**Category**" to see the categories.

The screenshot shows the 'Lookups' interface. At the top, there is a 'Lookup Category' dropdown menu with 'Conveyancer' selected, and a search bar with the placeholder text 'Enter a search term'. Below this is a table with the following data:

No	Category	Value	
1	Conveyancer	Acme Conveyancing	+ Actions
2	Conveyancer	British Conveyancers	+ Actions
3	Conveyancer	Gamma	+ Actions

The screenshot shows the 'Lookups' interface with the 'Lookup Category' dropdown menu open. The dropdown menu is highlighted with an orange box and contains the following options: 'Show all', 'Conveyancer', 'Mortgage Provider', and 'Surveyor'. The table below the dropdown menu is partially visible, showing the same data as the previous screenshot.

38

Click "**+Actions**" to delete the lookup from Dynamic Agent.

Click **"Delete Lookup"** to remove the lookup from the list.

Lookups

Lookup Category: Invoice Type

Search: Enter a search term

No	Category	Value	
1	Invoice Type	Auction Fees	+ Actions
2	Invoice Type	Credit Note	+ Actions
3	Invoice Type	Exchange	+ Actions
4	Invoice Type	Exchange & Marketing	+ Actions
5	Invoice Type	Marketing	+ Actions
6	Invoice Type	Referral	+ Actions

Lookups

Lookup Category: Invoice Type

Search: Enter a search term

No	Category	Value	
			Delete Lookup Hide
2	Invoice Type	Credit Note	+ Actions
3	Invoice Type	Exchange	+ Actions
4	Invoice Type	Exchange & Marketing	+ Actions
5	Invoice Type	Marketing	+ Actions
6	Invoice Type	Referral	+ Actions

39 Add Lookup

i Tip! Lookups are the drop down menus in Dynamic Agent.

40 The **'Add Lookup'** screen allows new lookup items to be added.

The screenshot displays two parts of a web application. On the left is a search table with a header 'Value' and three rows: 'Acme Conveyancing', 'British Conveyancers', and 'Gamma'. Each row has a green '+ Actions' button. Below the table is a pagination control showing '< 1 >'. On the right is the 'Add Lookup' form, which is highlighted with an orange border. It has a title 'Add Lookup', a subtitle 'Add a lookup here', a 'Category*' dropdown menu with 'Choose...' selected, an 'Item*' text input field, and a yellow 'Save' button.

41 Click **"Category"** Choose from Conveyancer, Mortgage Provider, Surveyor.

Click the **"Item*"** field and add the detail of the new lookup, in this case a new 'Mortgage Provider'

Click **"Save"**

Search

Enter a search term

Value

Acme Conveyancing	+ Actions
British Conveyancers	+ Actions
Gamma	+ Actions

< 1 >

Add Lookup

Add a lookup here

Category*

Item*

Save

Search

Enter a search term

Value

Acme Conveyancing	+ Actions
British Conveyancers	+ Actions
Gamma	+ Actions

< 1 >

Add Lookup

Add a lookup here

Category*

Item*

Choose...
 Conveyancer
 Mortgage Provider
 Surveyor

Save

Search

Value
No matching records found

Add Lookup

Add a lookup here

Category*

Item*

Save

iamproperty crm movebutler iamsold dynamicagent

Search

Value
No matching records found

Add Lookup

Add a lookup here

Category*

Item*

Save

42 The new lookup will show in the '**Lookup Category**' field.

In this case select the "**Mortgage Provider**" option and the new option shows.

The screenshot shows a 'Lookups' interface. At the top, there is a dark blue header with the word 'Lookups' in white. Below the header, there are two main sections. On the left, there is a 'Lookup Category' dropdown menu with 'Mortgage Provider' selected. On the right, there is a 'Search' input field with a magnifying glass icon and the placeholder text 'Enter a search term'. Below these sections is a table with three columns: 'No', 'Category', and 'Value'. The table contains one row with the following data: '1' in the 'No' column, 'Mortgage Provider' in the 'Category' column, and 'Santander' in the 'Value' column. To the right of the 'Value' column, there is a green button with the text '+ Actions'. The table is enclosed in a light gray border with a small pagination control at the bottom right showing the number '1'.

No	Category	Value	
1	Mortgage Provider	Santander	+ Actions