

Generating Compliance Reports in CRM



This guide provides a step-by-step approach to generating Compliance Reports, helping to show dates for compliance checks in an easy to use format.

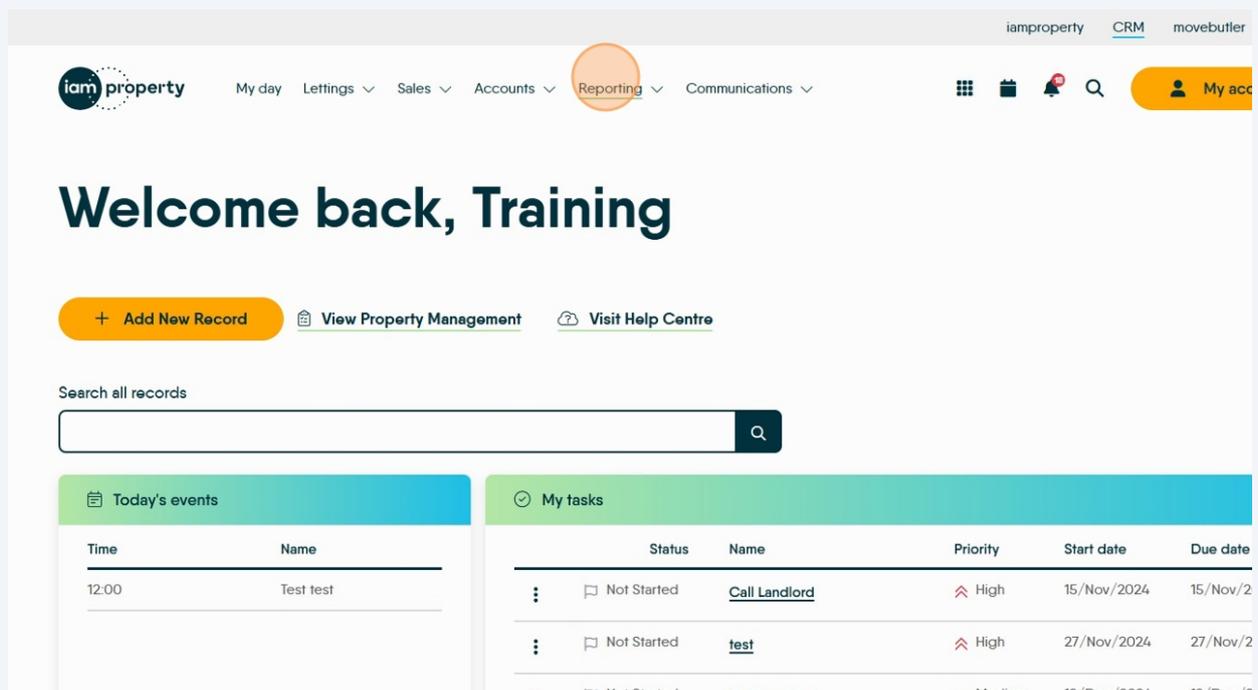
By following the process below, users can efficiently create comprehensive compliance reports and streamline the process of sending necessary information to contractors.

Additionally, the guide highlights automation options that can save time and reduce manual workload, ensuring timely compliance management.

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

 Tip! There are a few ways to create Compliance Reports the most straightforward is via the Reporting menu.

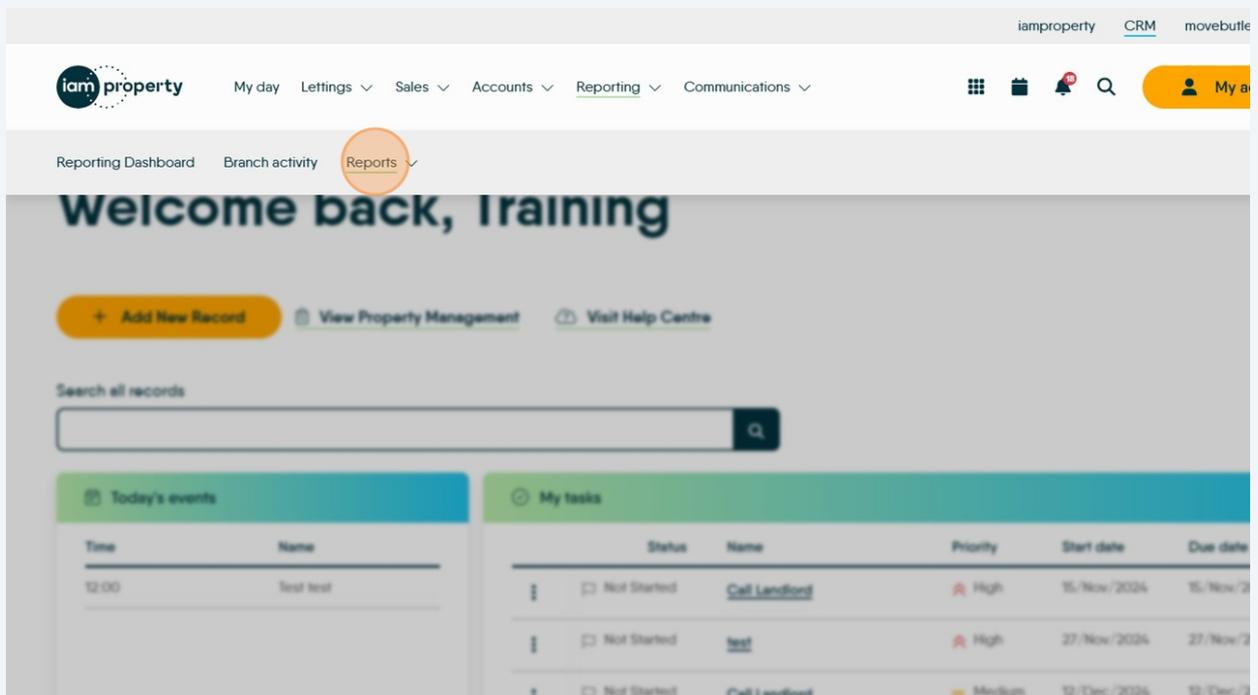
2 Click "Reporting"



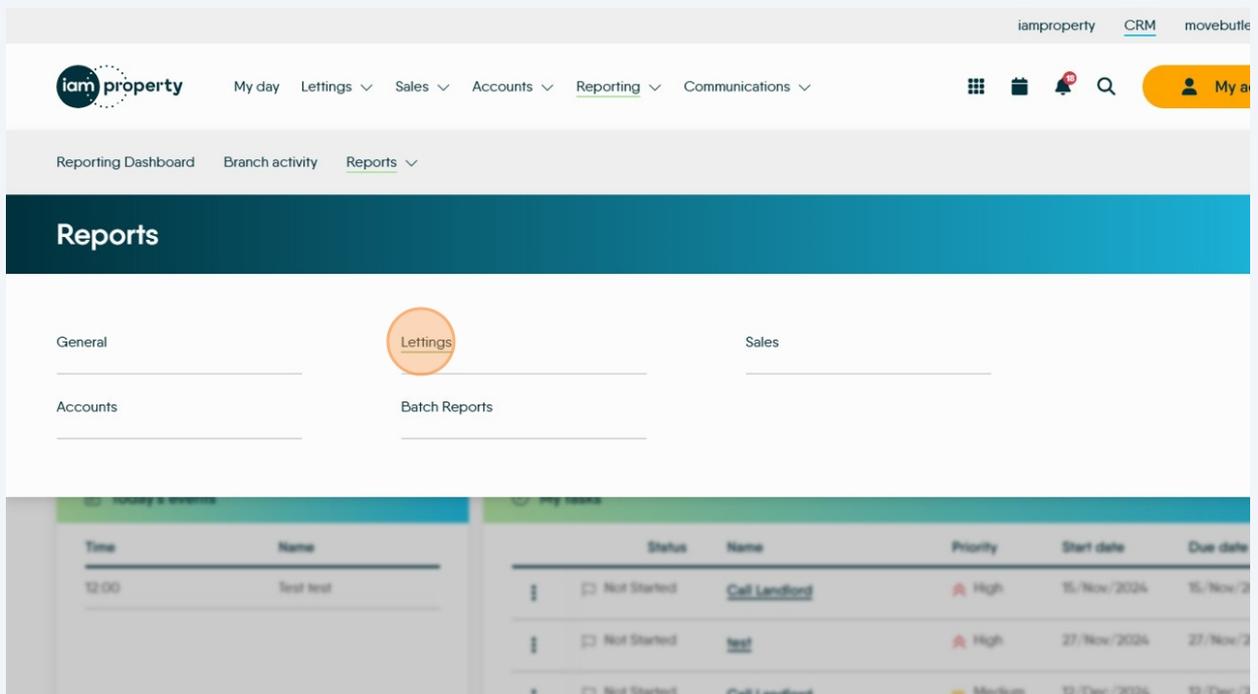
The screenshot shows the CRM dashboard for 'iamproperty'. The navigation bar includes 'My day', 'Lettings', 'Sales', 'Accounts', 'Reporting', and 'Communications'. The 'Reporting' menu item is circled in orange. Below the navigation bar, the main content area displays 'Welcome back, Training' and a search bar. There are also buttons for 'Add New Record', 'View Property Management', and 'Visit Help Centre'. At the bottom, there are two panels: 'Today's events' and 'My tasks'. The 'My tasks' panel contains a table with the following data:

Status	Name	Priority	Start date	Due date
Not Started	Call Landlord	High	15/Nov/2024	15/Nov/2024
Not Started	test	High	27/Nov/2024	27/Nov/2024
Not Started	Call Landlord	Medium	12/Dec/2024	12/Dec/2024

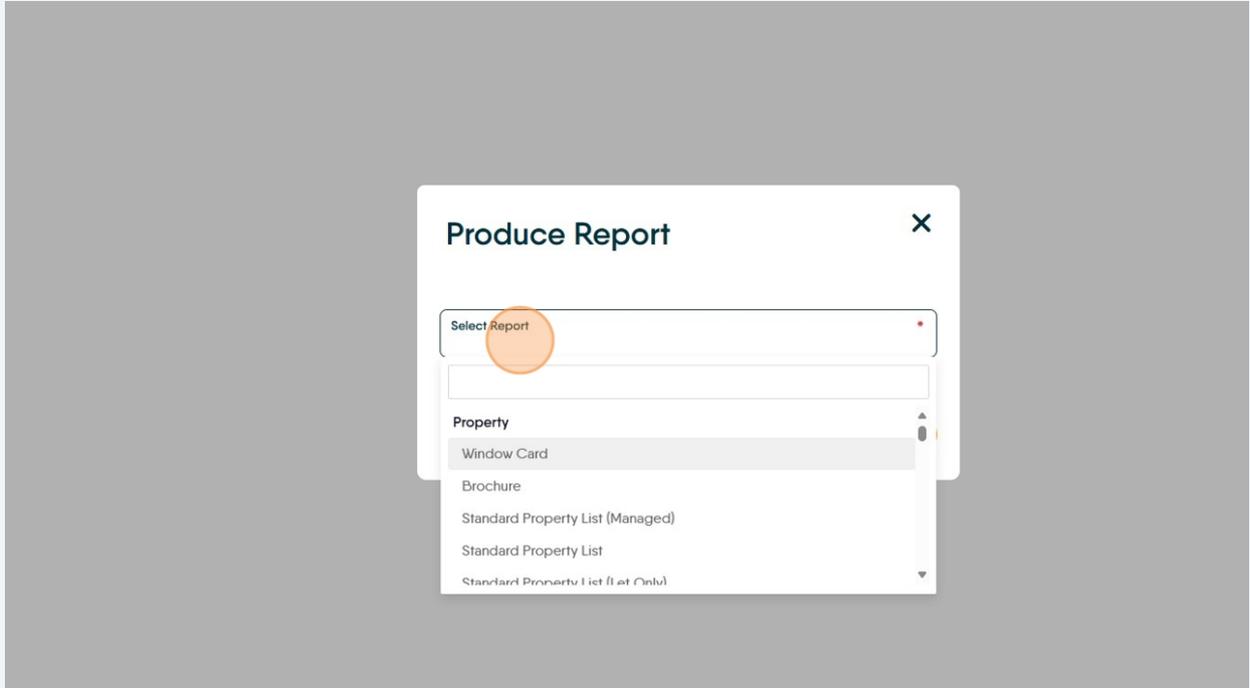
3 Click "Reports"



4 Click "Lettings"



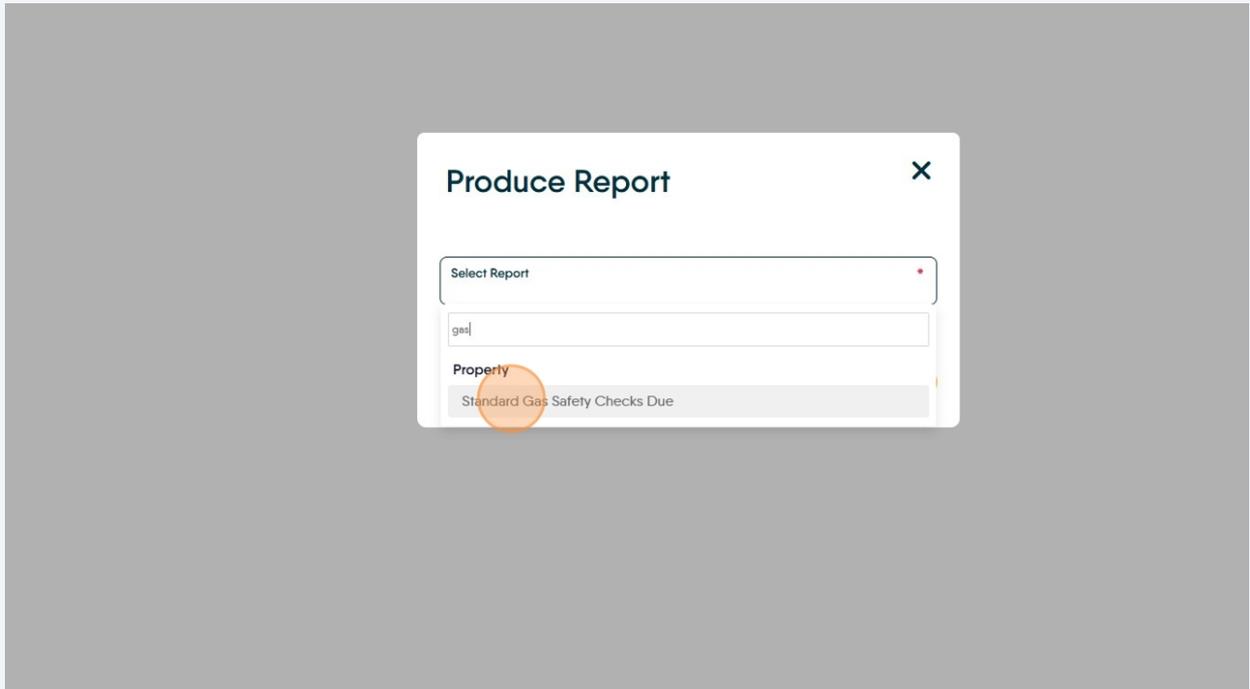
5 Click here.



6 Type the name of the report you are looking for e.g. Gas.

7

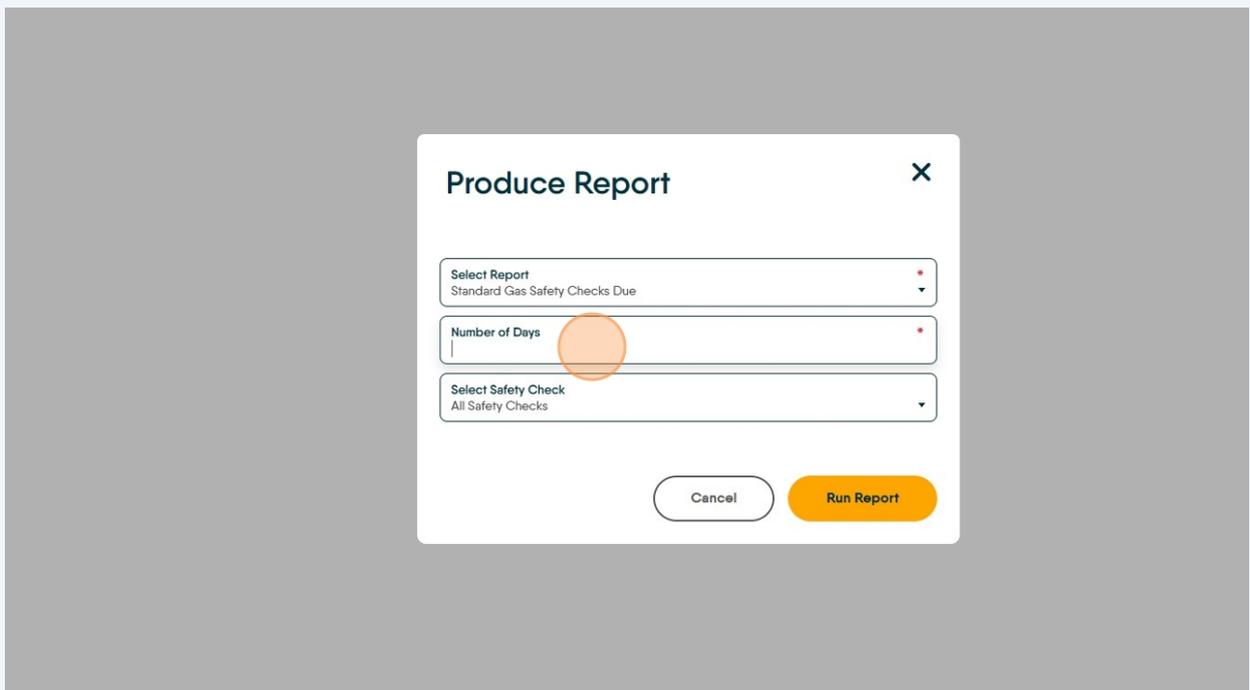
Click "Standard Gas Safety Checks Due" or the name of the report you want to create.



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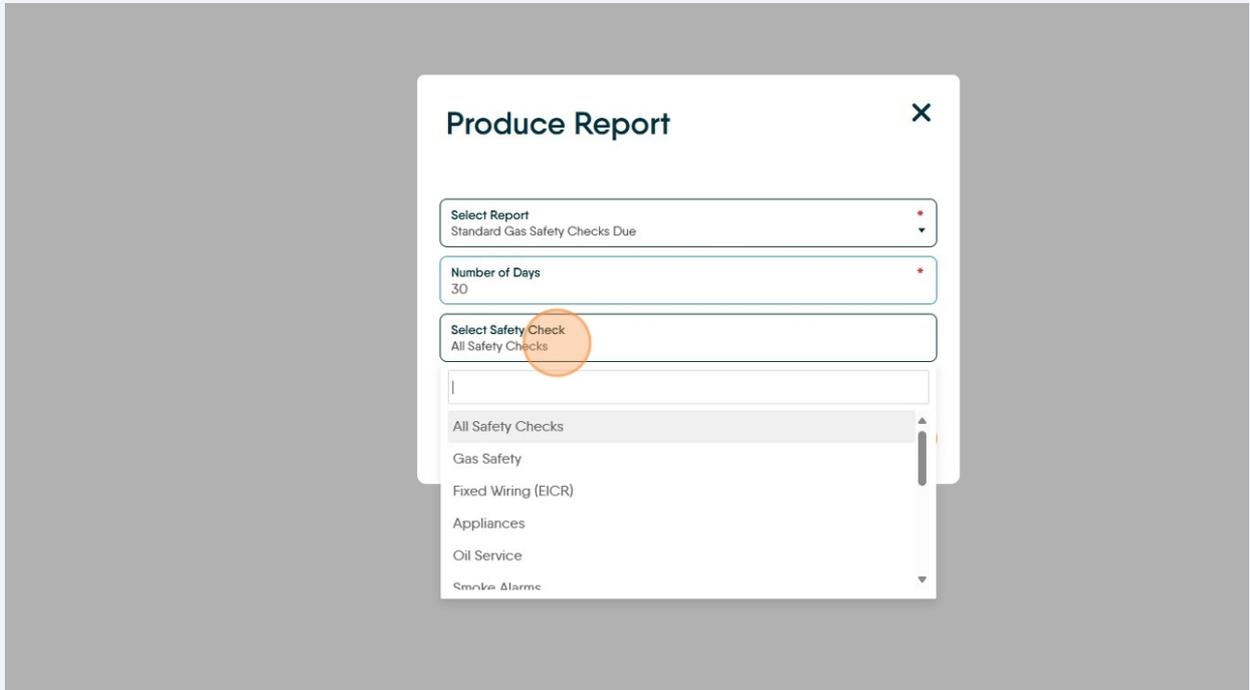
Click the "Number of Days" field. This sets how many days in the future the report will show e.g. 30 days will show checks due within the next 30 days.

n.b. This report will allow you to run a report on all Compliance checks at the same time.



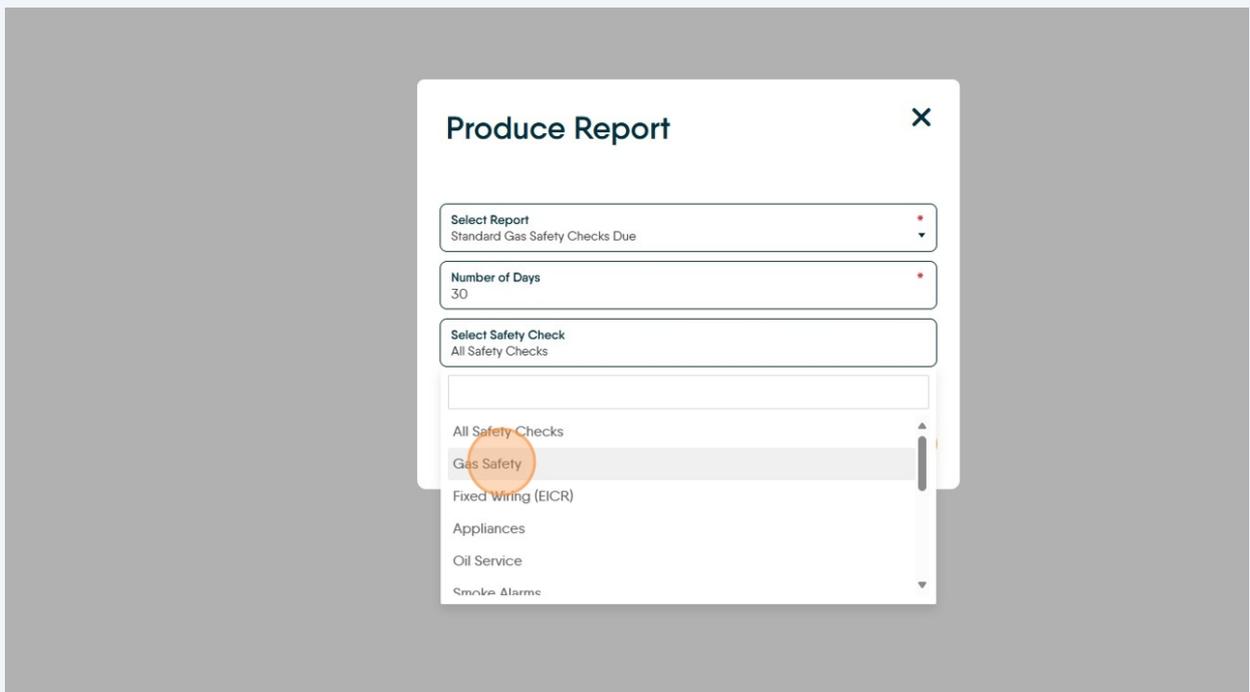
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Click "All Safety Checks" and select the Safety Check from the drop down menu.

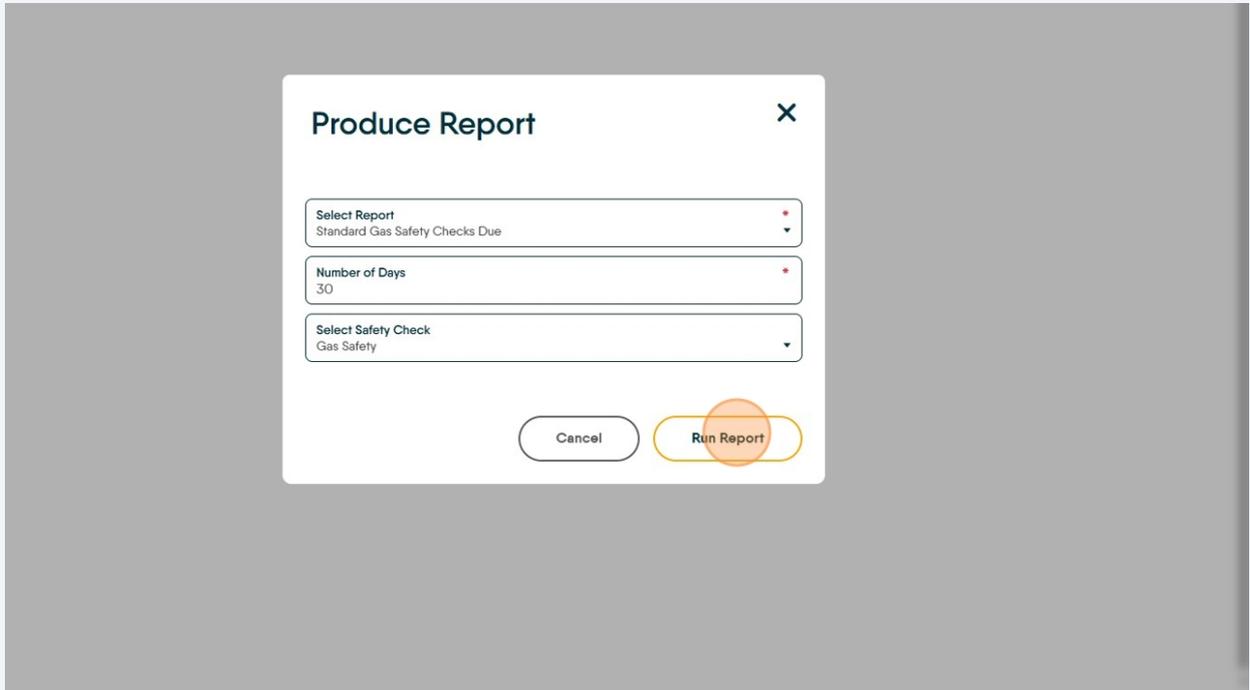


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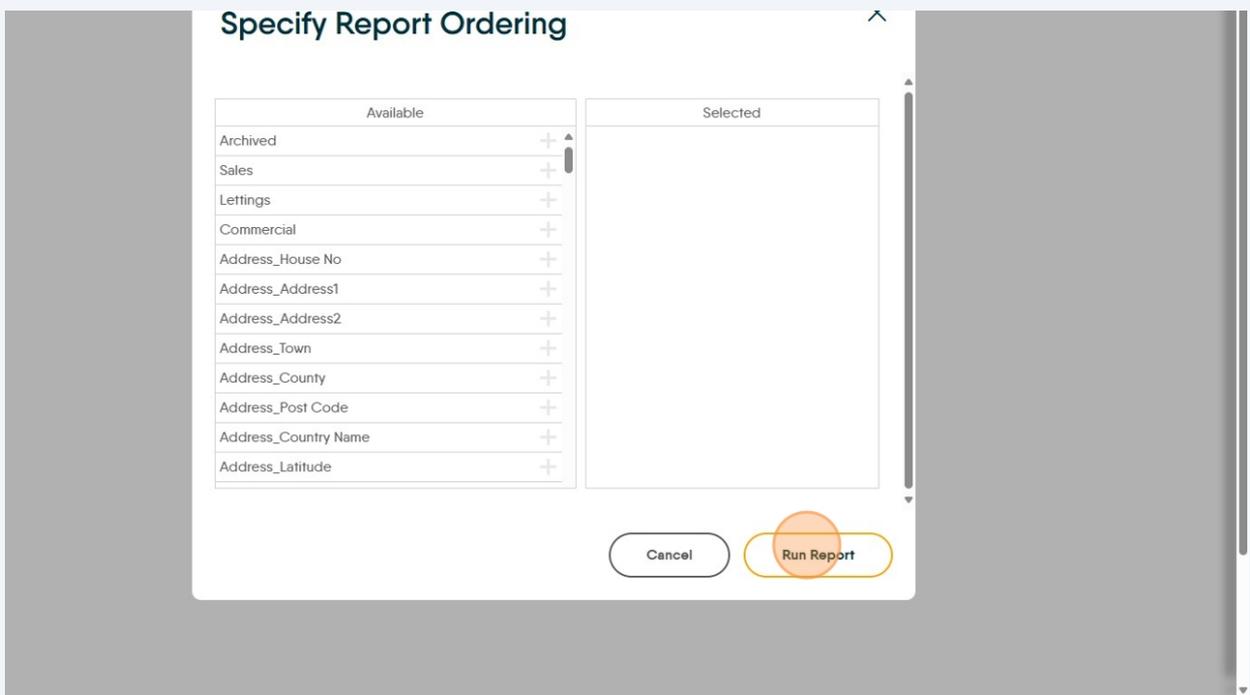
In this case we click "Gas Safety"



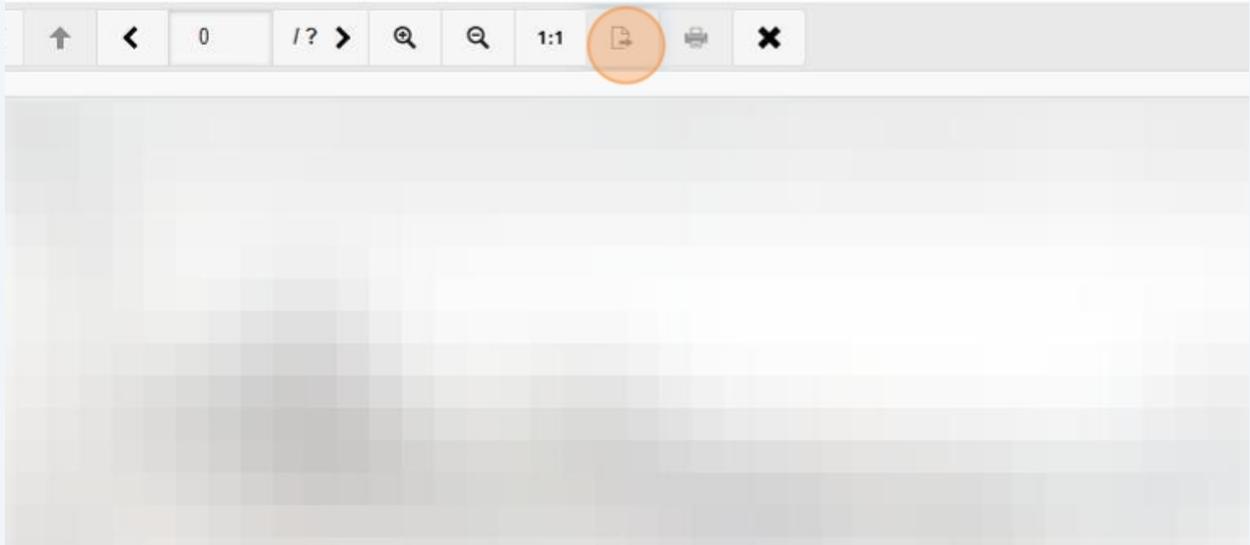
11 Click "Run Report"



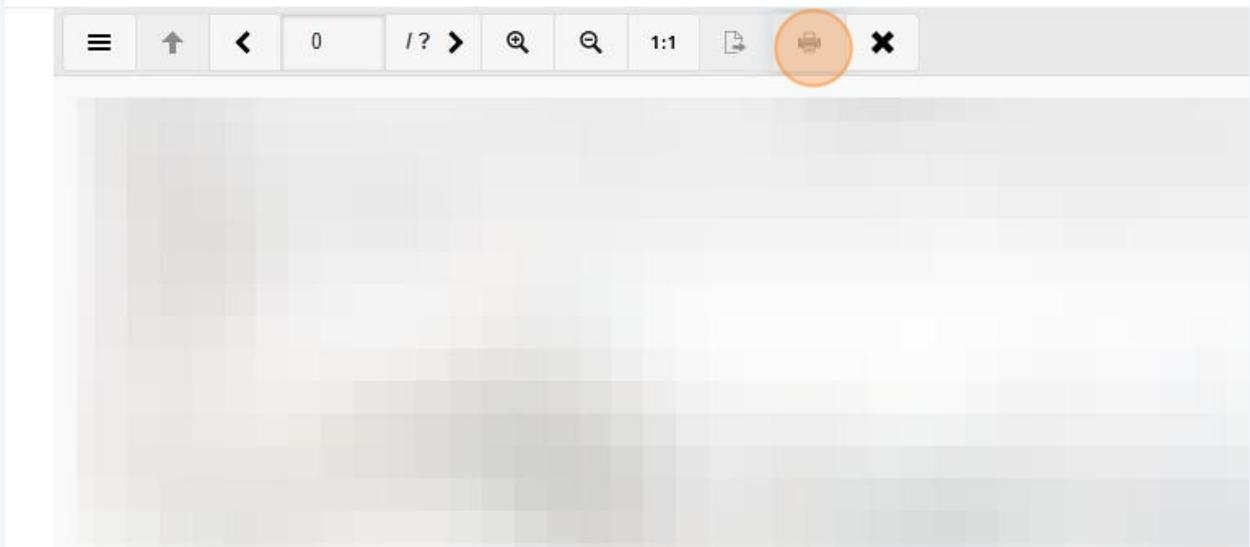
12 Click "Run Report" we can ignore this 'Specify Report Ordering' screen



- 13** Once the report has compiled. Click "Export" and select the file type (we suggest either Excel if you want to edit or PDF)



- 14** Or Click "Print" to print the document.



Creating a Compliance Report from the Activity List

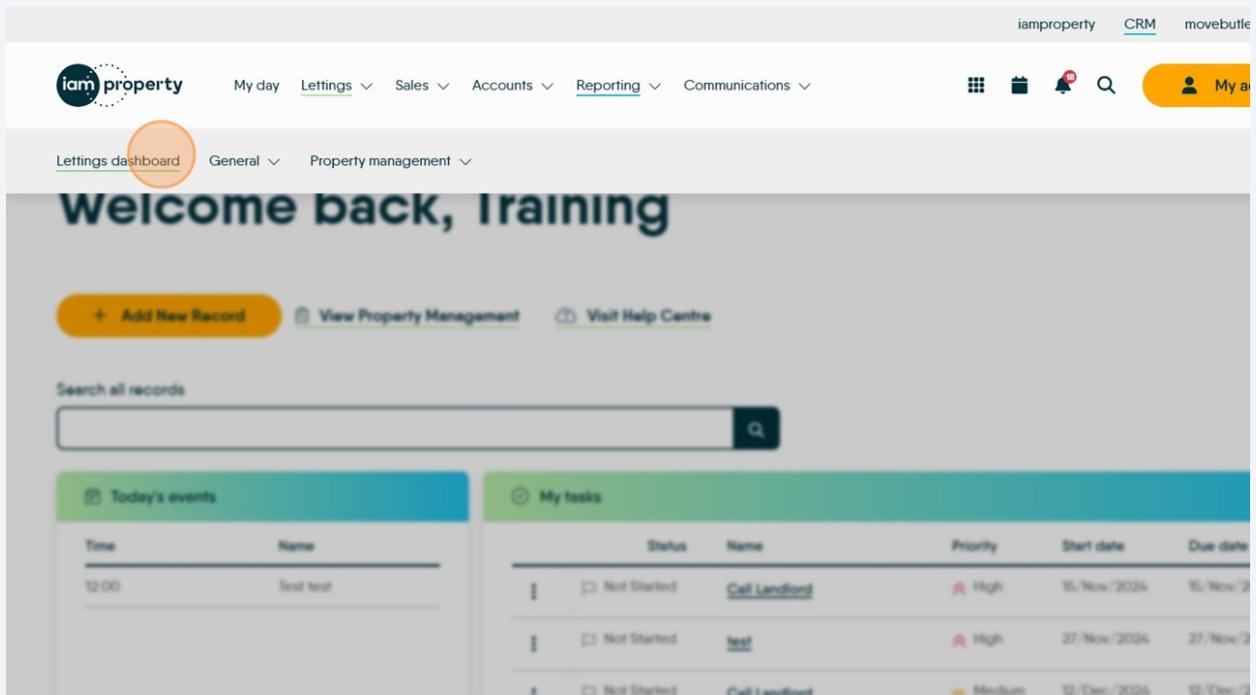
15 Click "Lettings"

The screenshot shows the iamproperty CRM dashboard. The top navigation bar includes the iamproperty logo, a 'My day' menu, and a 'Lettings' menu which is highlighted with an orange circle. Other menu items include Sales, Accounts, Reporting, and Communications. The main header area displays 'Welcome back, Training' and three action buttons: '+ Add New Record', 'View Property Management', and 'Visit Help Centre'. Below this is a search bar labeled 'Search all records'. The dashboard is divided into two main sections: 'Today's events' and 'My tasks'. The 'Today's events' section shows a table with one event at 12:00 named 'Test test'. The 'My tasks' section shows a table with three tasks, all with a status of 'Not Started'.

Time	Name
12:00	Test test

Status	Name	Priority	Start date	Due date
Not Started	<u>Call Landlord</u>	High	15/Nov/2024	15/Nov/2024
Not Started	<u>test</u>	High	27/Nov/2024	27/Nov/2024
Not Started	<u>Call Landlord</u>	Medium	12/Dec/2024	12/Dec/2024

16 Click "Lettings dashboard"



Alert! A compliance record will only show in the Activity List if it is; Enabled and there are records to show within the date range. To edit these click the cog icon.

17 Click "Gas Safety Due" or any of the other Compliance reports.

The screenshot shows the 'Activity List' sidebar on the left. The 'Gas Safety Due' item is highlighted with an orange circle. The main content area on the right displays a message: "Please select an activity list item to begin" with a calendar icon above it.

18 Click this checkbox to select all of the records displayed.

The screenshot shows the 'Gas Safety Due' report table. The 'Negotiator' checkbox in the first row is highlighted with an orange circle. The table has columns for 'Negotiator', 'Property', and 'Landlord'. The first row is expanded to show details for David-George Morgan.

<input type="checkbox"/>	Negotiator	Property	Landlord
<input type="checkbox"/>	David-George Morgan	63 Woodland Road, Darlington DL3 7BQ	Arthur Morgan
<input type="checkbox"/>	David-George Morgan	Flat 89 Alverton Drive, Faverdale, Darlington DL3 0GA	Gandalf Grey
<input type="checkbox"/>	David-George Morgan	17 Yew Tree Close, Hurworth, Darlington DL2 2HX	Gandalf Grey
<input type="checkbox"/>	David-George Morgan	1 Spruce Grove, Darlington DL3 8NW	Eve Harmon
<input type="checkbox"/>	Training Dave	73 Pelaw Crescent, Chester le Street DH2 2HX	Villegas
<input type="checkbox"/>	Training Dave	73 Pelaw Crescent, Chester le Street DH2 2HX	Villegas
<input type="checkbox"/>	Training Dave	16 Yew Tree Close, Hurworth, Darlington DL2 2HX	Landlord4

19 Click here to export the list to a CSV file. This can be emailed to your contractor.

The screenshot shows the iamproperty CRM dashboard. At the top, there are navigation tabs for 'My day', 'Lettings', 'Sales', 'Accounts', 'Reporting', and 'Communications'. Below this is a summary row with cards for 'Properties' (80), 'Landlords' (52), 'Tenants' (51), 'Applicants' (11), 'PB Tenants' (9), and 'Contractors' (28). On the left, an 'Activity List' sidebar shows various due dates like 'Lettings Applicant Checklist', 'Gas Safety Due', 'Fixed Wiring (EICR) Due', 'Fire Extinguishers Due', 'Carbon Monoxide Due', and 'EPC Due'. The main content area displays a table titled 'Gas Safety Due' with columns for 'Negotiator', 'Property', and 'Landlord'. A tooltip 'Export to CSV' is shown over the table's action menu, which also contains icons for email, chat, and refresh. The table lists several entries, including properties in Darlington and Chester le Street.

	Negotiator	Property	Landlord
☑	David-George Morgan	63 Woodland Road, Darlington DL3 7BQ	Arthur Morgan
☑	David-George Morgan	Flat 89 Alverton Drive, Faverdale, Darlington DL3 0GA	Gandalf Grey
☑	David-George Morgan	17 Yew Tree Close, Hurworth, Darlington DL2 2HX	Gandalf Grey
☑	David-George Morgan	1 Spruce Grove, Darlington DL3 8NW	Eve Harmon
☑	Training Dave	73 Pelaw Crescent, Chester le Street DH2 2HX	Villegas
☑	Training Dave	73 Pelaw Crescent, Chester le Street DH2 2HX	Villegas



Tip! Collating and sending Compliance information to contractors can be automated. This means that a contractor can be sent details of and Compliance items, as required without any interaction from you.