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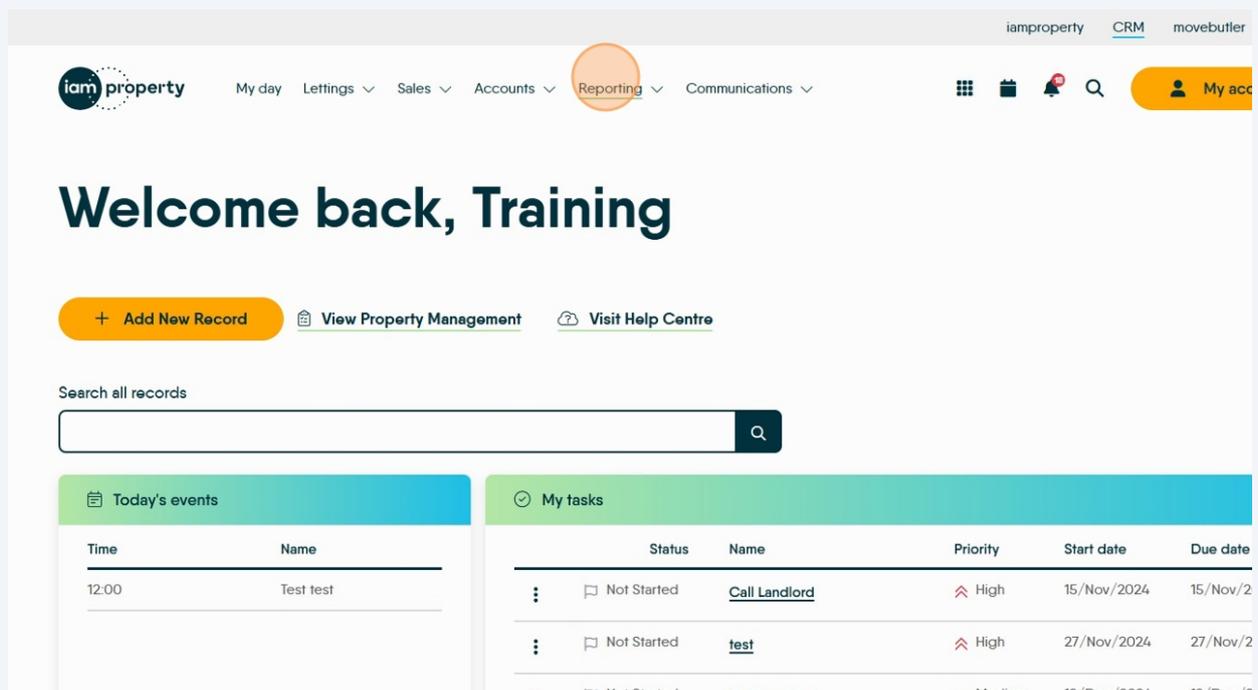
By following the process below, users can efficiently create comprehensive compliance reports and streamline the process of sending necessary information to contractors.

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**

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

2   Click "Reporting"

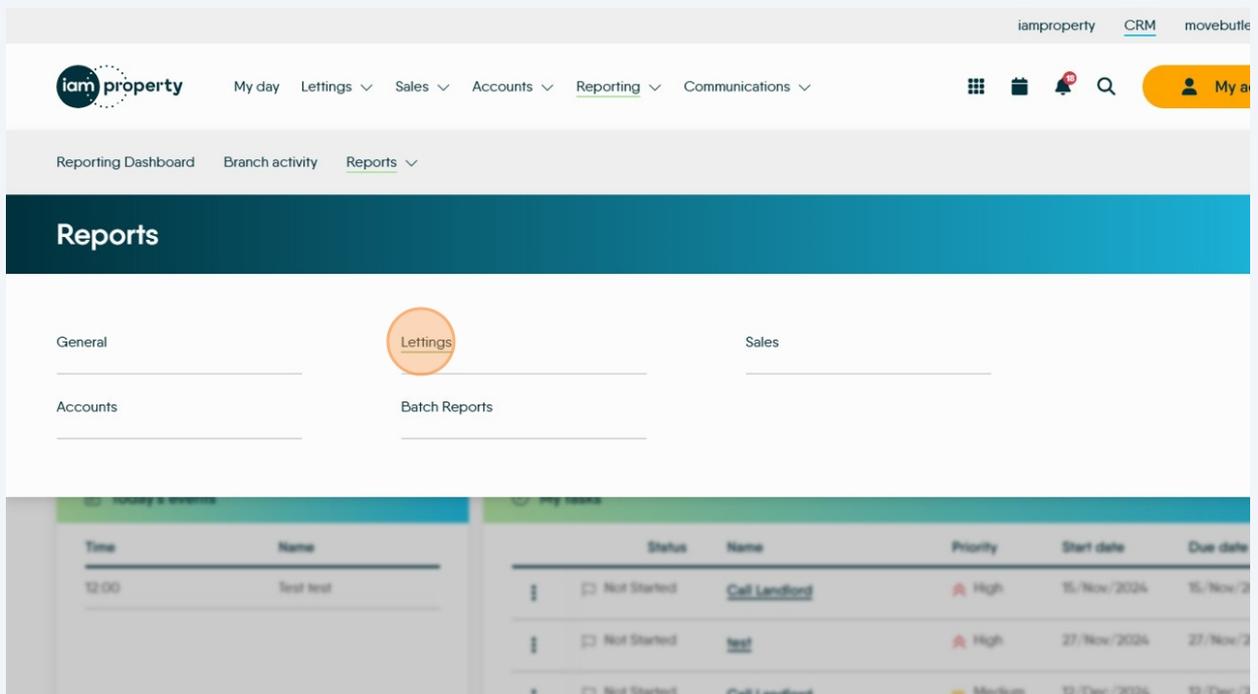**3** Click "Reports"

4 Click "Lettings"

5 Click here.

Produce Report ✕

Select Report   *

Property
Window Card
Brochure
Standard Property List (Managed)
Standard Property List
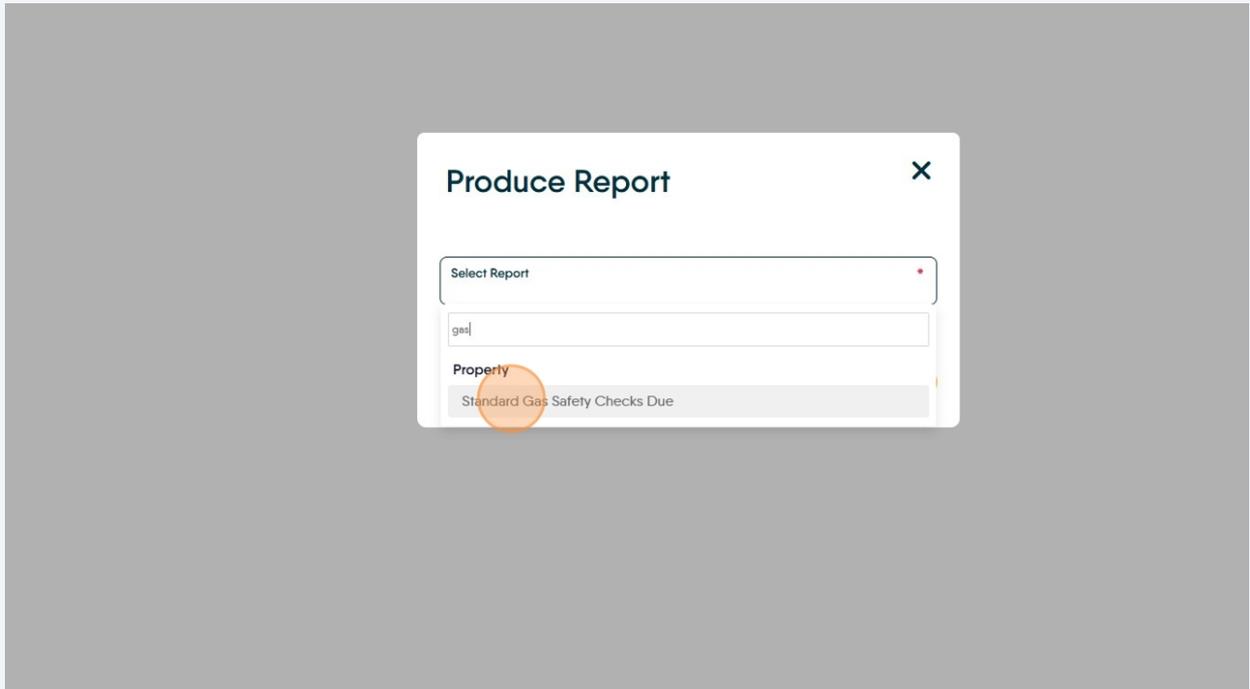Standard Property List (Let Only)
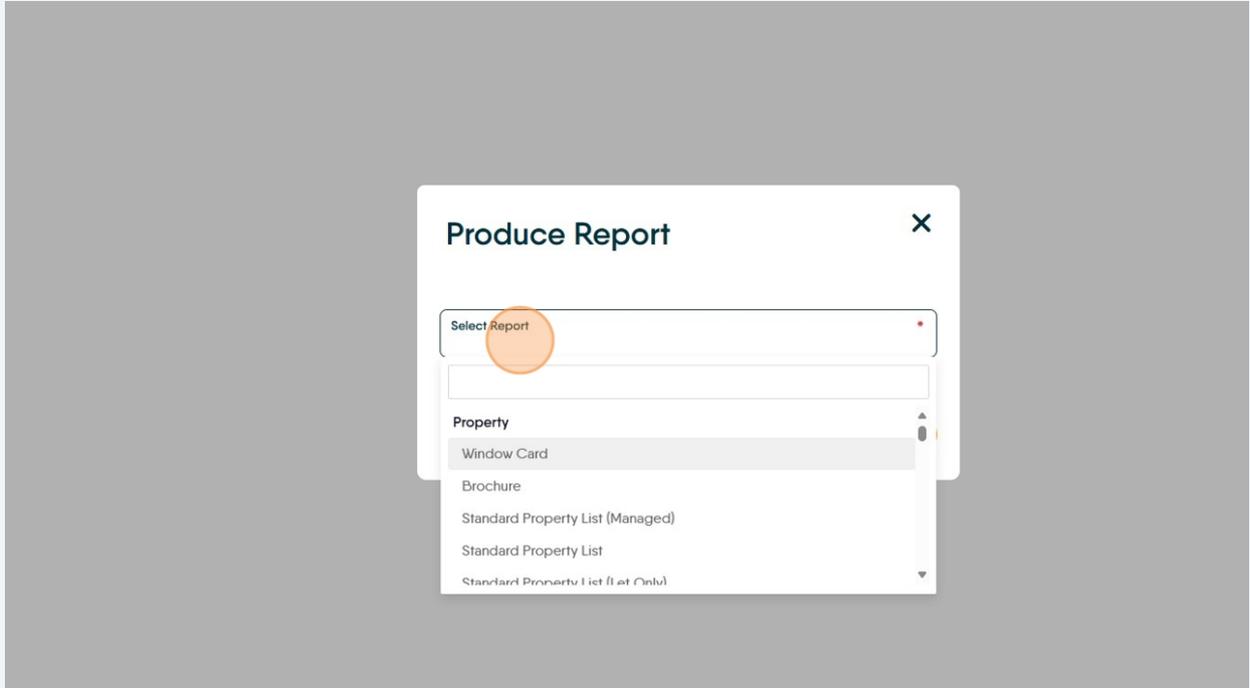
6 Type the name of the report you are looking for e.g. Gas.

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

Produce Report ✕

Select Report *

gas

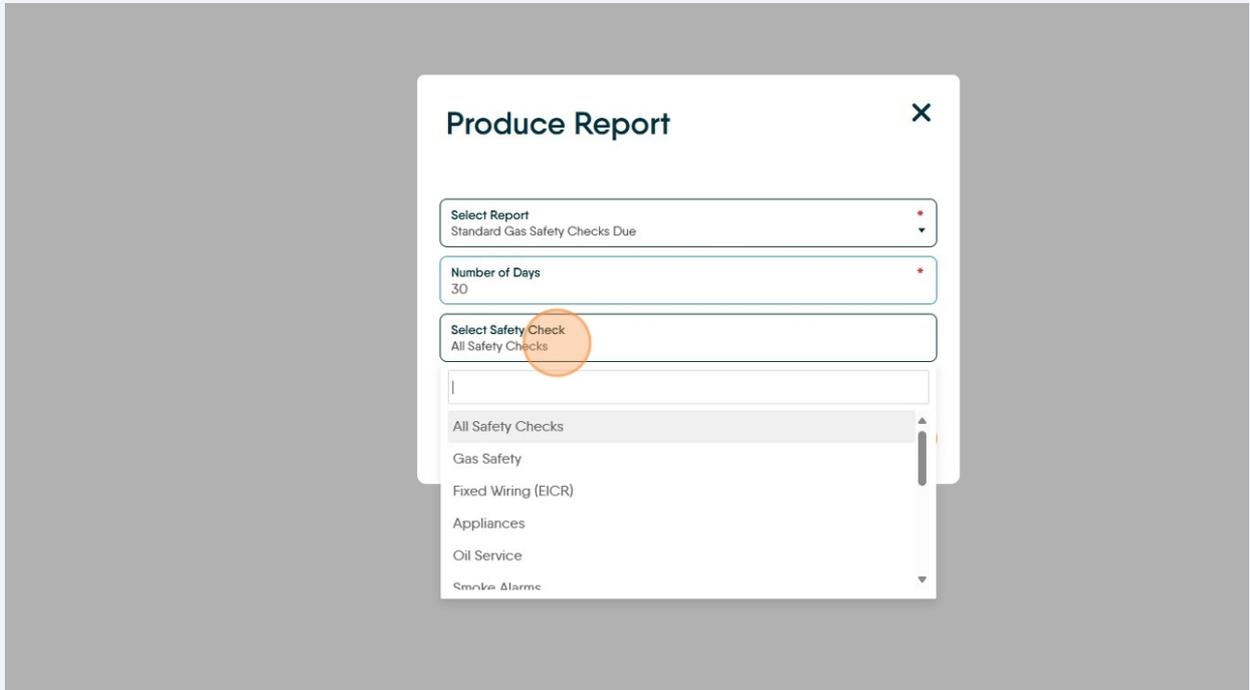**Property**

Standard Gas Safety Checks Due

8 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.

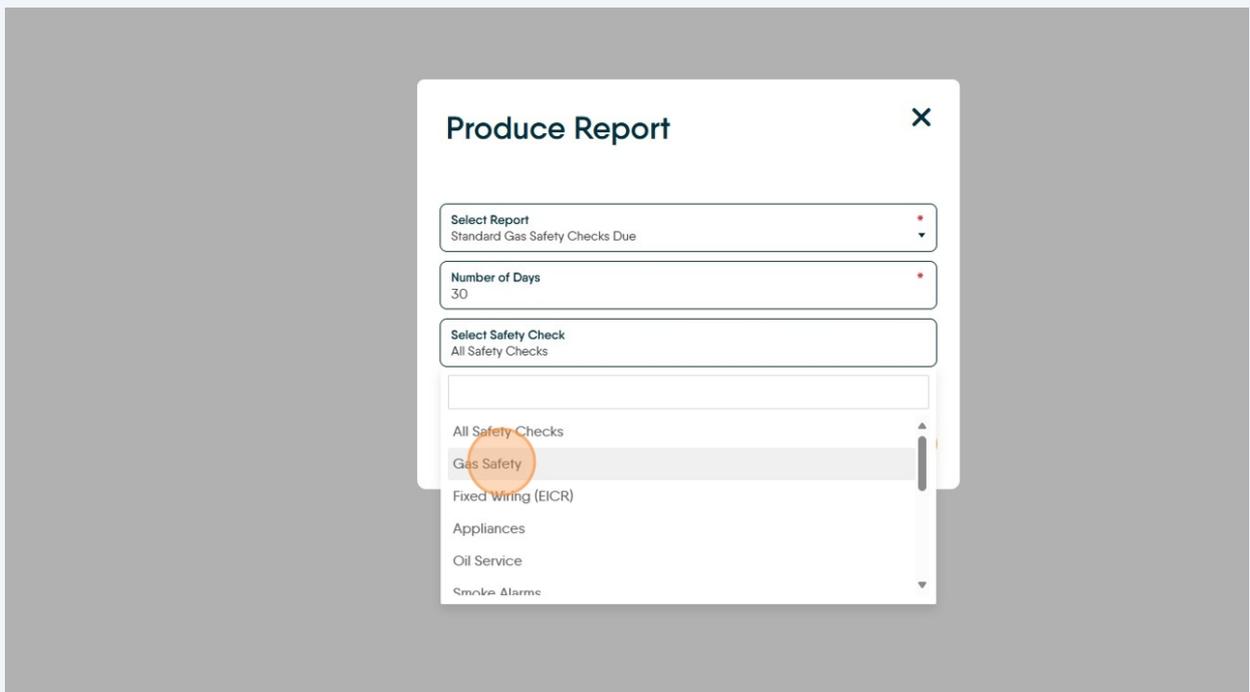n.b. This report will allow you to run a report on all Compliance checks at the same time.

Produce Report ✕

Select Report *
Standard Gas Safety Checks Due

Number of Days *

Select Safety Check
All Safety Checks

Cancel   **Run Report**
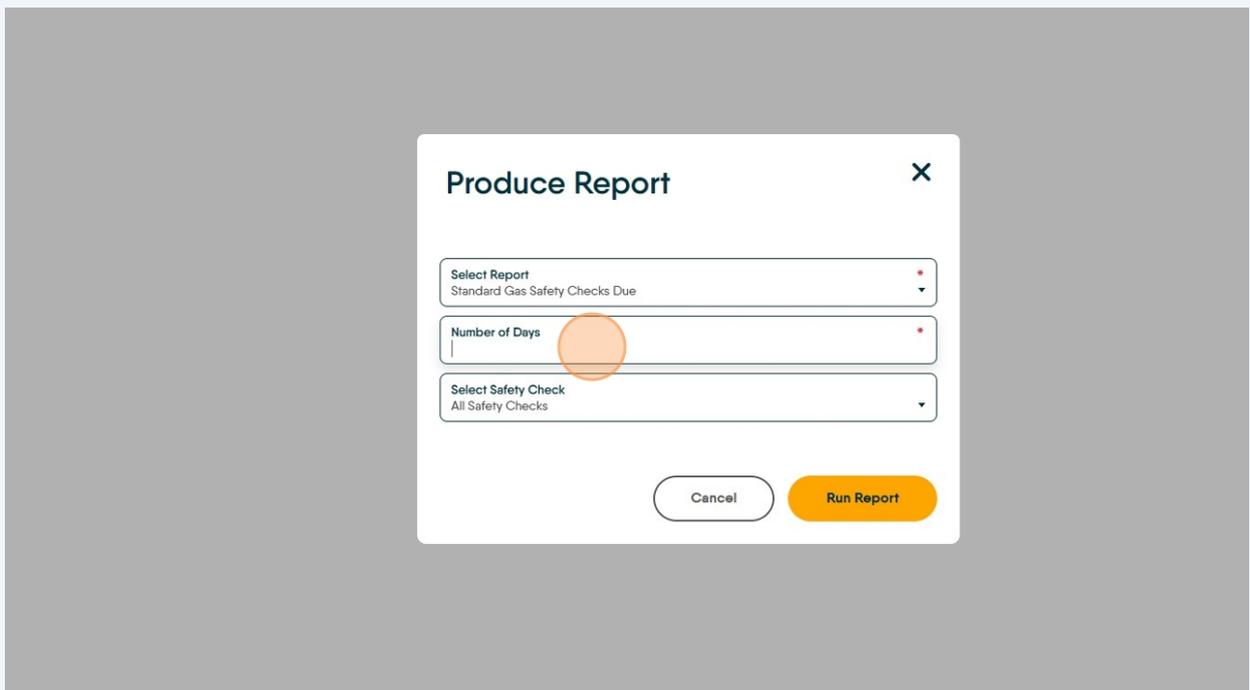
9 Click "All Safety Checks" and select the Safety Check from the drop down menu.

Produce Report ✕

Select Report
Standard Gas Safety Checks Due

Number of Days
30

Select Safety Check
All Safety Checks

All Safety Checks
Gas Safety
Fixed Wiring (EICR)
Appliances
Oil Service
Smoke Alarms

10 In this case we click "Gas Safety"

Produce Report ✕

Select Report
Standard Gas Safety Checks Due

Number of Days
30

Select Safety Check
All Safety Checks

All Safety Checks
Gas Safety
Fixed Wiring (EICR)
Appliances
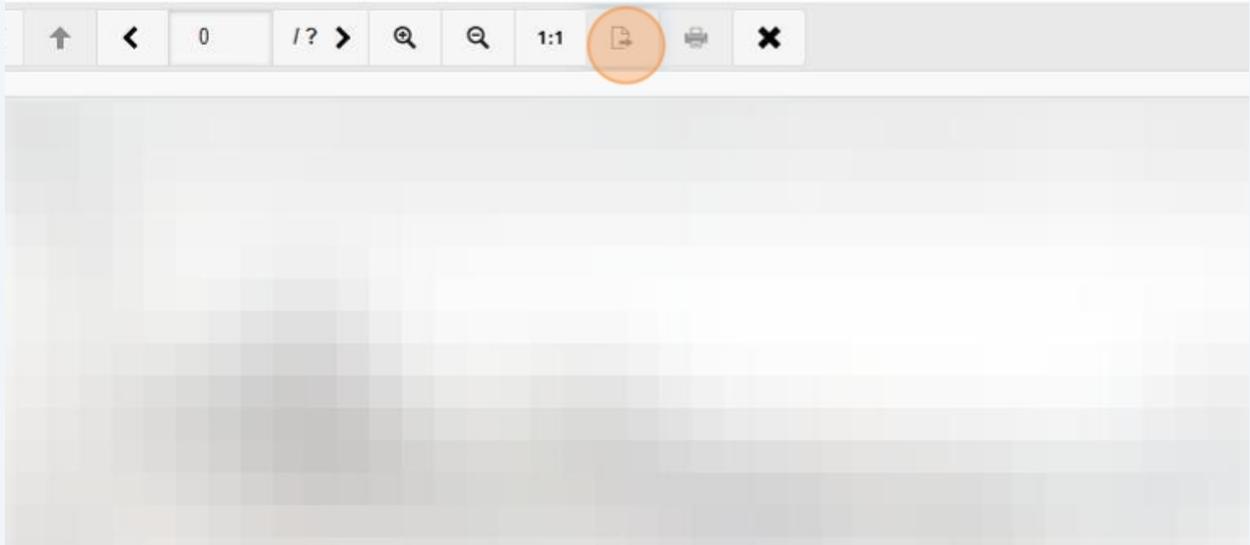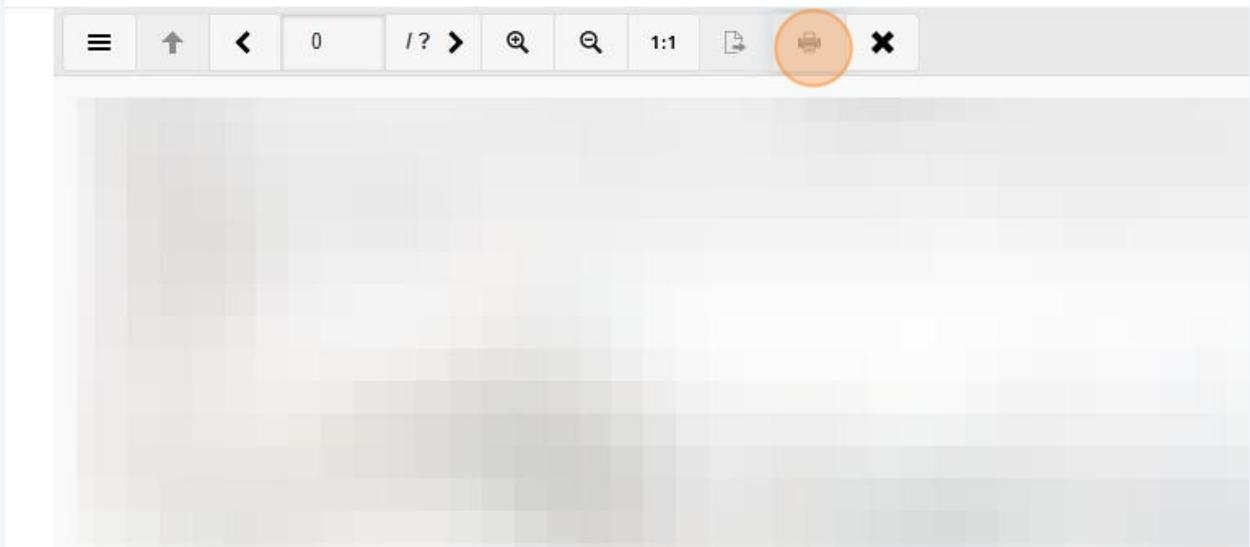Oil Service
Smoke Alarms
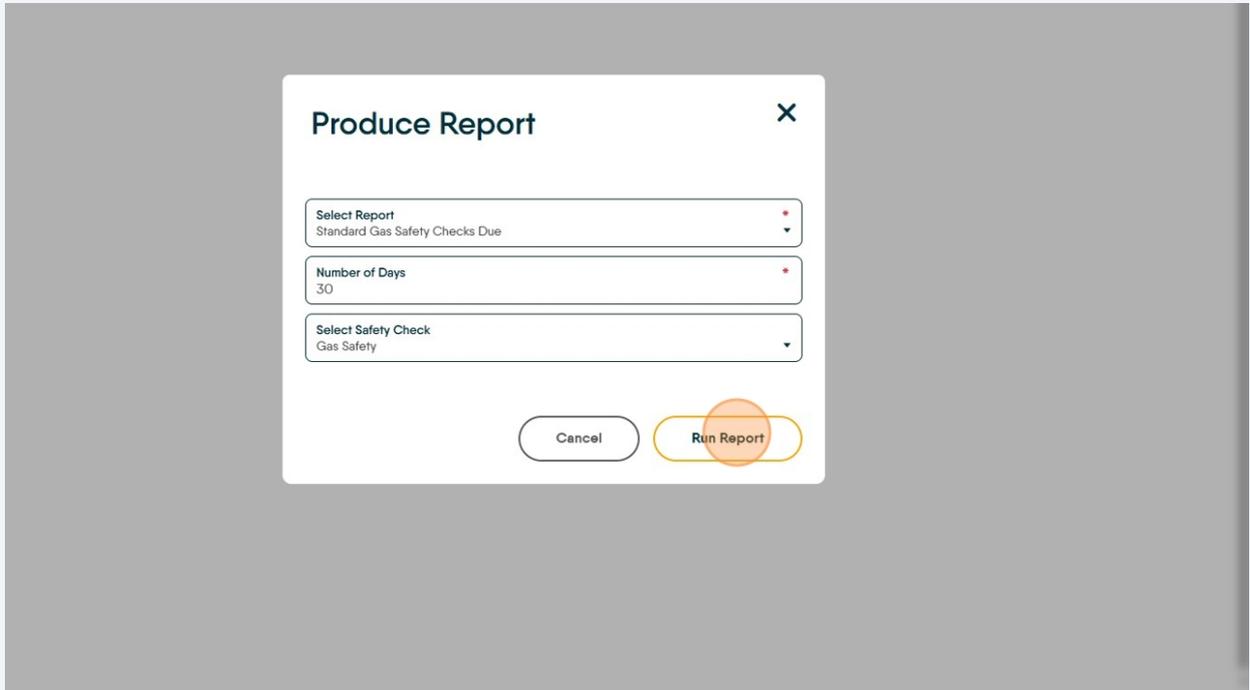
11 Click "Run Report"

12 Click "Run Report" we can ignore this 'Specify Report Ordering' screen
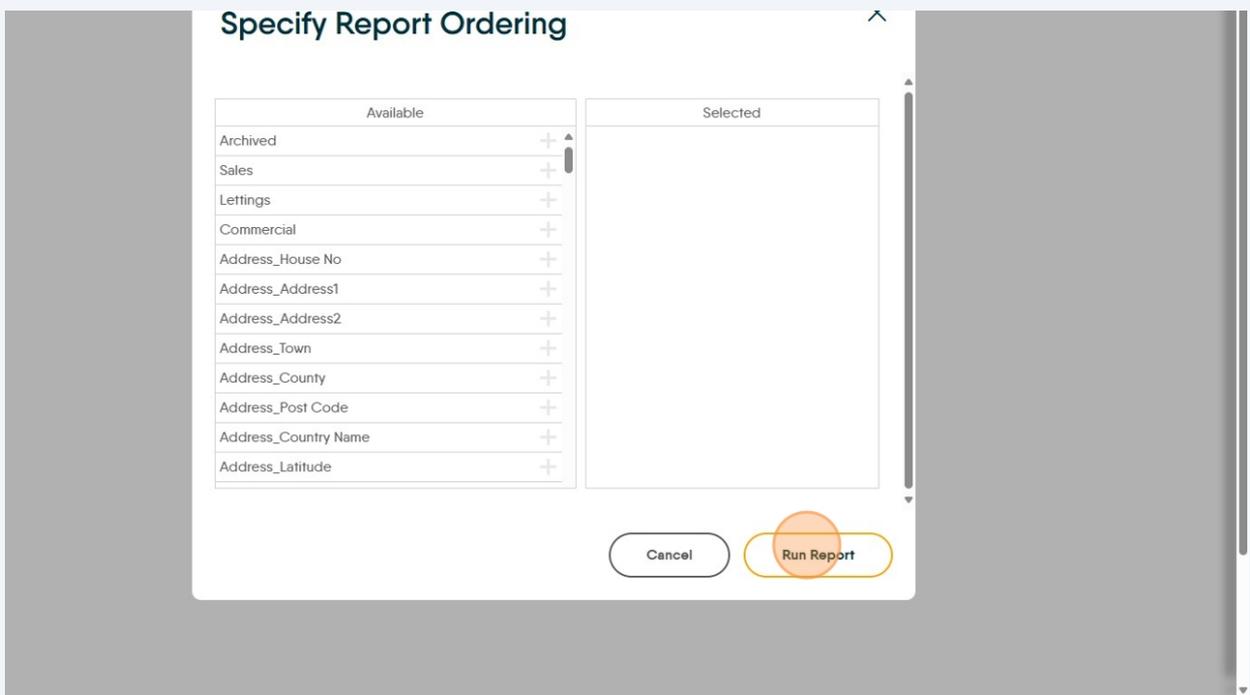
13 Once the report has compiled. Click "Export" and select the file type (we suggest either Excel if you want to edit or PDF)

14 Or Click "Print" to print the document.

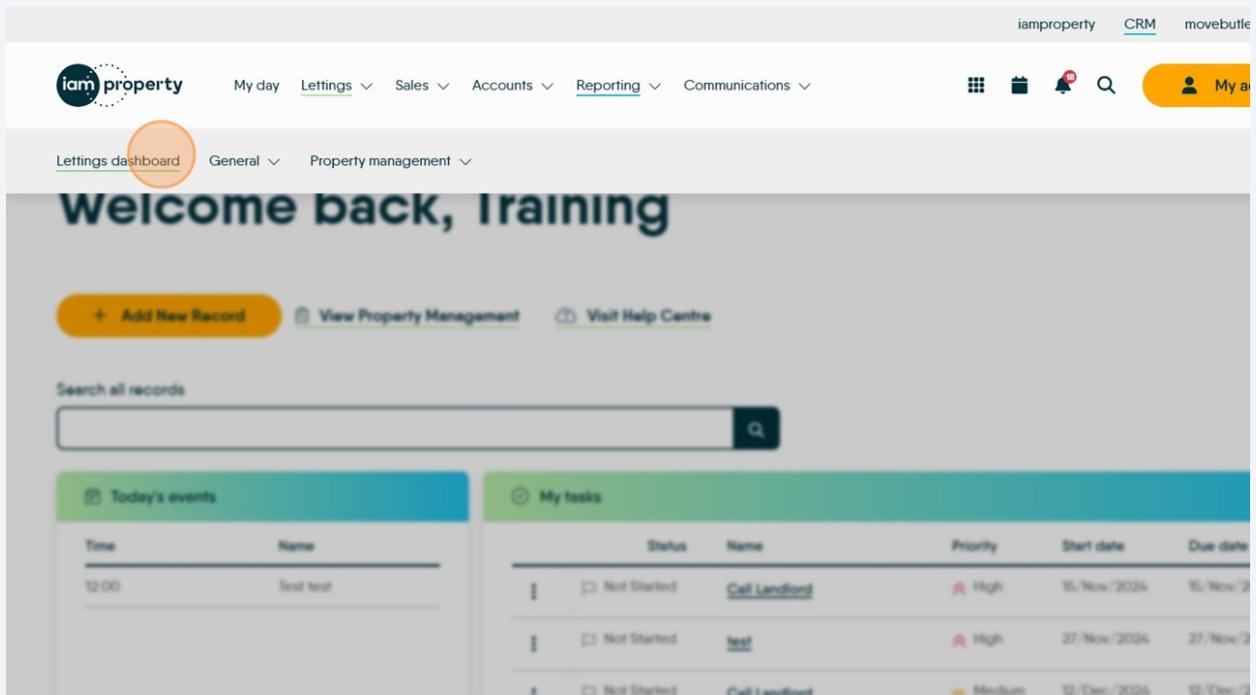# Creating a Compliance Report from the Activity List

15 Click "Lettings"

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.

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

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

iamproperty   CRM   movebutler

iam property   My day   Lettings ∨   Sales ∨   Accounts ∨   Reporting ∨   Communications ∨

Properties	Landlords	Tenants	Applicants	PB Tenants	Contractors	Key Contro
80 +	52 +	51 +	11 +	9 +	28 +	🗝

Activity List ↻ ⚙

Export to CSV

	Lettings Applicant Checklist	1	↗
💧	Gas Safety Due	26	↗
⚡	Fixed Wiring (EICR) Due	5	↗
🔔	Fire Extinguishers Due	2	↗
🏠	Carbon Monoxide Due	2	↗
📊	EPC Due	1	↗

Gas Safety Due

✉ 💬 🖨 📤 ▼ ☰   ↻ Search

		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.