

Running a Report in CRM



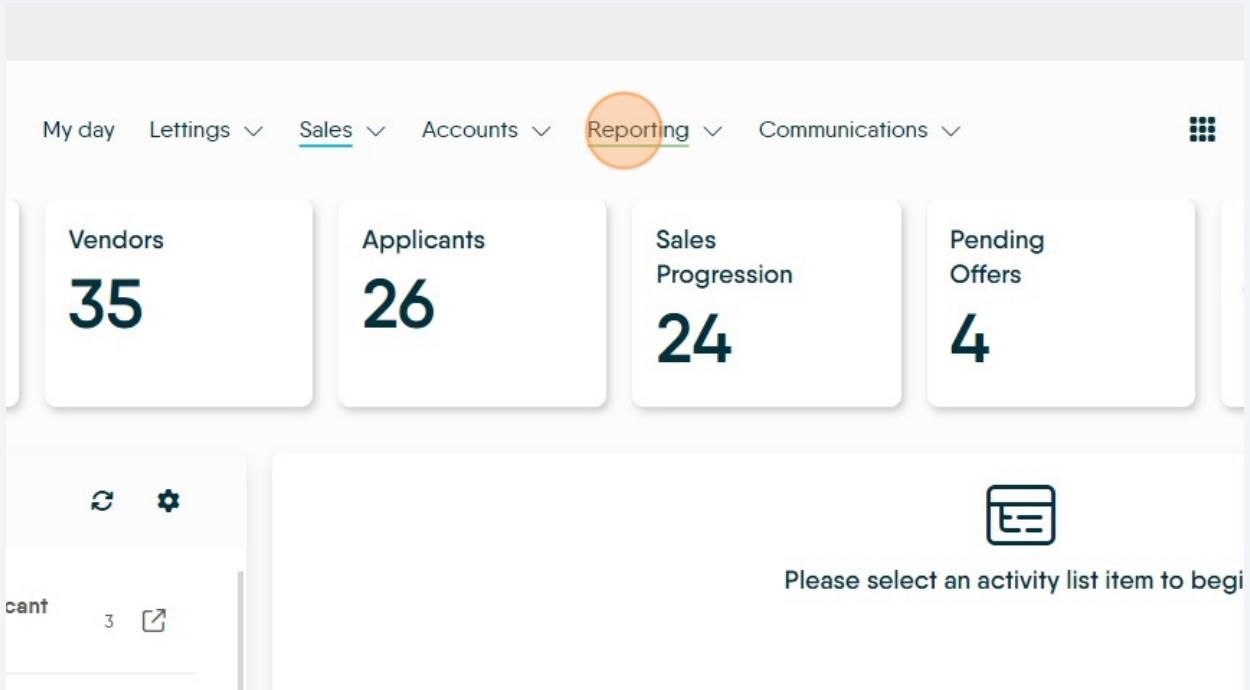
This guide provides a step-by-step for effectively running reports and managing appointments within the CRM system. Users will gain insights into navigating dashboards, creating reports, making it easier to track tasks and manage properties.

With clear instructions, this resource is essential for anyone looking to enhance their efficiency and productivity in real estate management. Engaging with this guide will streamline your workflow and improve your overall CRM experience.

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

Creating a Report

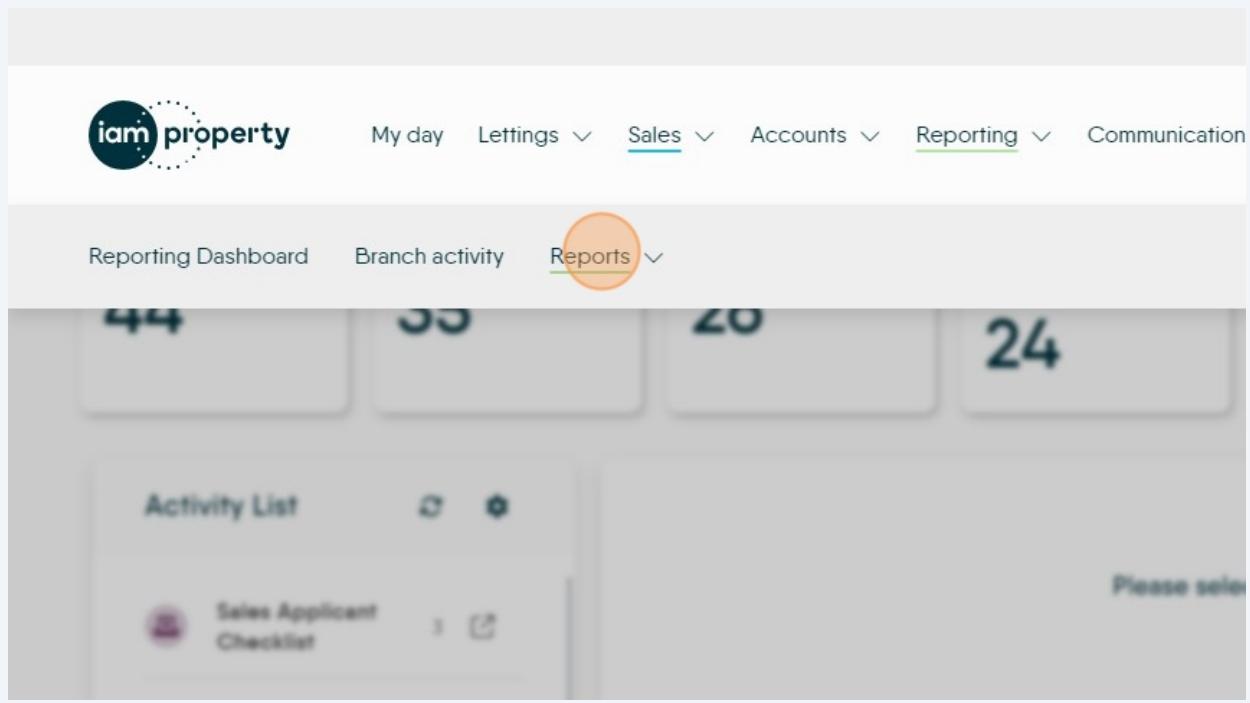
- 2 Click "Reporting"



The image shows a screenshot of a CRM application's dashboard. At the top, there is a navigation bar with links: "My day", "Lettings", "Sales" (which is underlined in blue), "Accounts", "Reporting" (which is highlighted with a red oval), and "Communications". Below the navigation bar, there are four large cards displaying summary data: "Vendors" (35), "Applicants" (26), "Sales Progression" (24), and "Pending Offers" (4). To the right of these cards is a button with a grid icon. At the bottom of the dashboard, there is a section titled "Activity list" with a sub-section "Please select an activity list item to begin". On the far left, there is a sidebar with a "Search" input field and a "Recent" section showing "3" recent items.

3

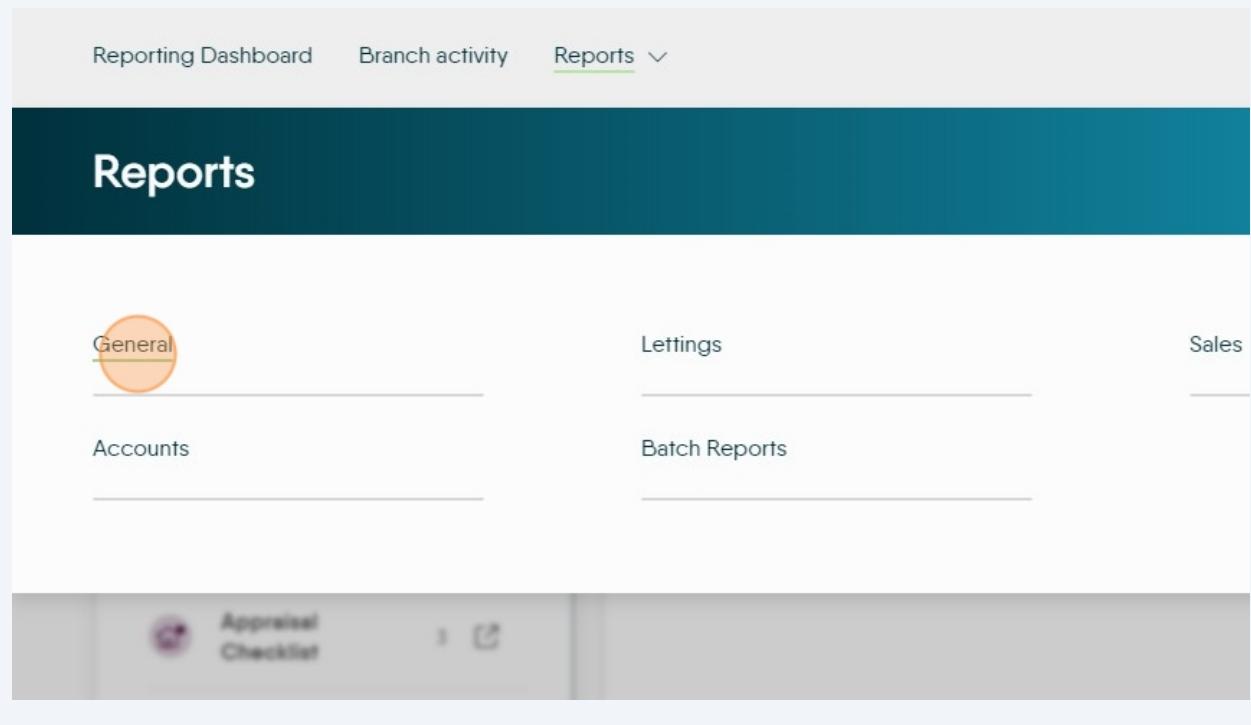
Click "Reports"



Alert! The process for creating a report in CRM is the same whichever option you select.

We are using the 'General' option for this guide.

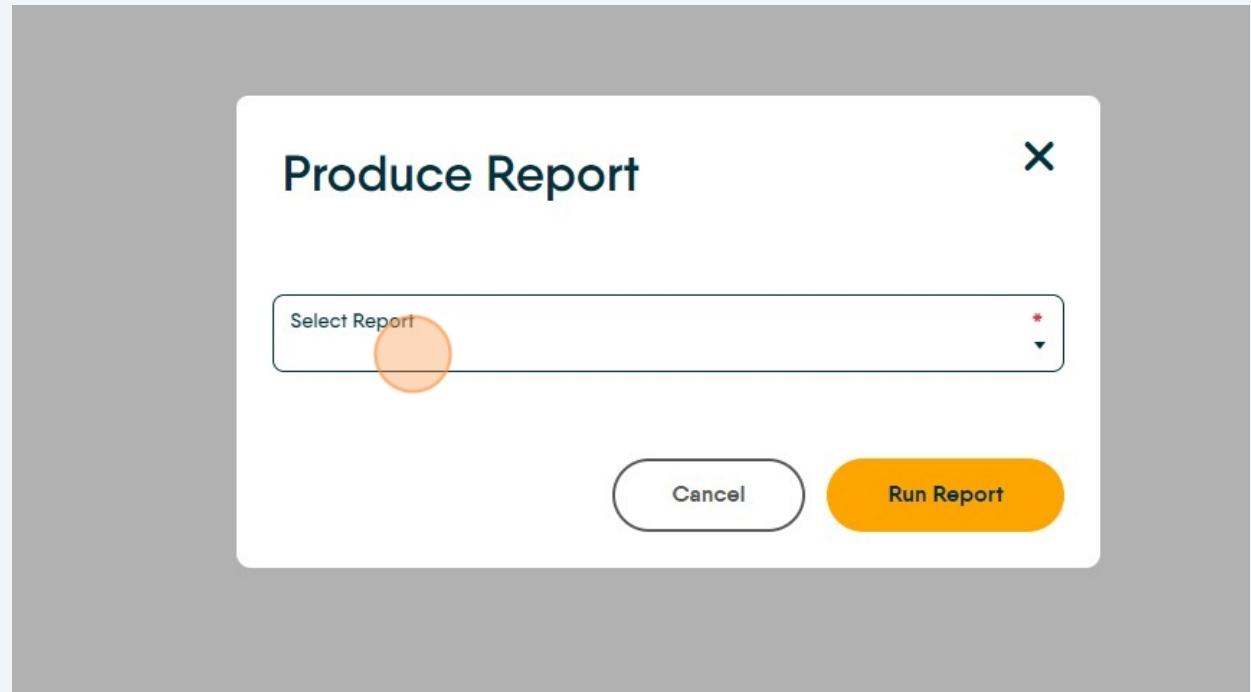
4 Click "General" or any other category



The screenshot shows the 'Reports' section of the Reporting Dashboard. At the top, there are navigation links: 'Reporting Dashboard', 'Branch activity', and 'Reports'. The 'Reports' link is underlined. Below this, the word 'Reports' is displayed in a large, bold, white font on a dark blue background. Underneath, there are several categories: 'General' (which is highlighted with an orange circle), 'Accounts', 'Lettings', 'Batch Reports', and 'Sales'. At the bottom of the screenshot, there is a navigation bar with icons for 'Appraisal', 'Checklist', and other report types.

5 Click here to select the report, type the name of the report you are searching for into the field and the options will show.

If the report does not show please check with your onboarding specialist or our support team at crm.support@iamproperty.com

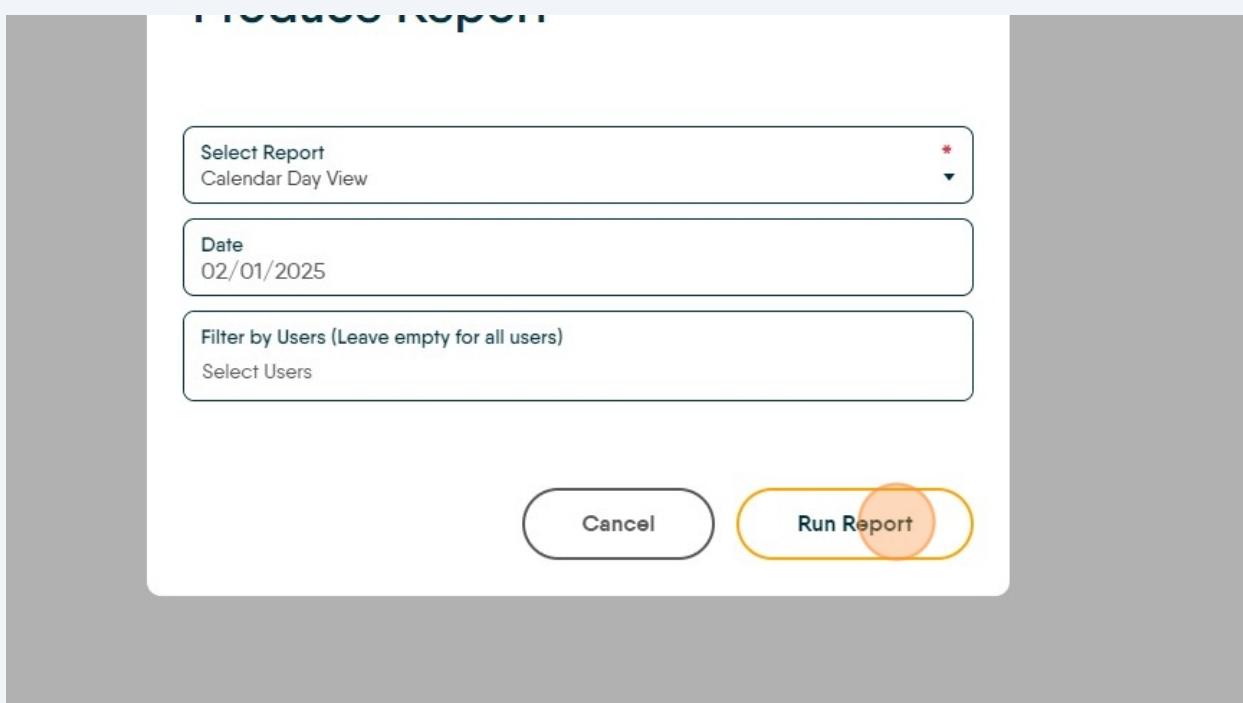


The screenshot shows a 'Produce Report' dialog box. The title 'Produce Report' is at the top left, and a close button 'X' is at the top right. Below the title is a search bar labeled 'Select Report' with a dropdown arrow. The input field is highlighted with an orange circle. At the bottom of the dialog box are two buttons: 'Cancel' on the left and 'Run Report' on the right, which is highlighted with an orange circle. The background of the dialog box is white, and the overall background of the application is grey.

6 in this example we are using "Calendar Day View" the process is very similar regardless of what report you are creating.



7 there may be a screen that requests some additional information, complete this. Click "Run Report".



8

Click here to specify what you want to see in the report (not all reports support this feature).

Click here.

Specify Report Ordering

Available

Event Title	+
Start Time	+
End Time	+
Location	+
Additional Notes	+
Event Type	+
Property_Address	+
Asking Rent	+

Selected

Event Title	ASC	DESC	✖
End Time	ASC	DESC	✖

Specify Report Ordering

Available

Start Time	+
End Time	+
Location	+
Additional Notes	+
Event Type	+
Property_Address	+
Asking Rent	+
Asking Price	+
Viewing Status	+

Selected

Event Title	ASC	DESC	✖
End Time	ASC	DESC	✖

Specify Report Ordering

X

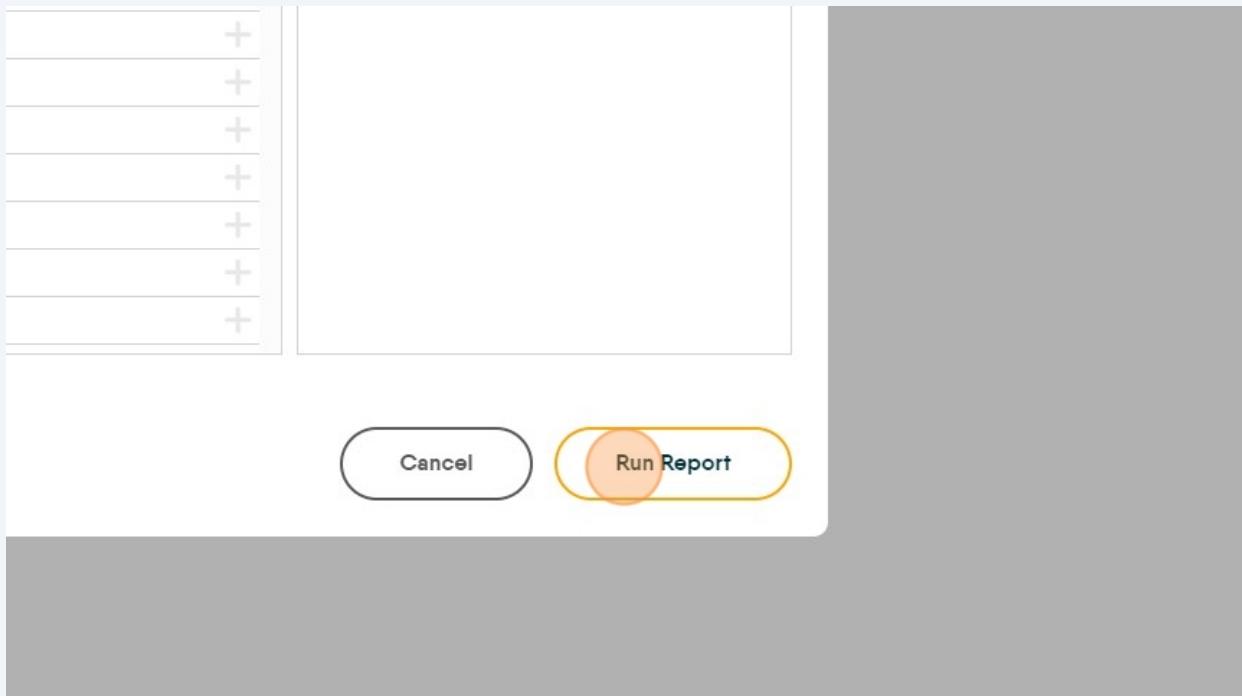
Available	Selected
Start Time	<input type="checkbox"/> Event Title ASC DESC trash
Location	<input type="checkbox"/> End Time ASC DESC trash
Additional Notes	<input type="checkbox"/> Start Time ASC DESC trash
Event Type	
Property_Address	
Asking Rent	
Asking Price	
Viewing Status	

Specify Report Ordering

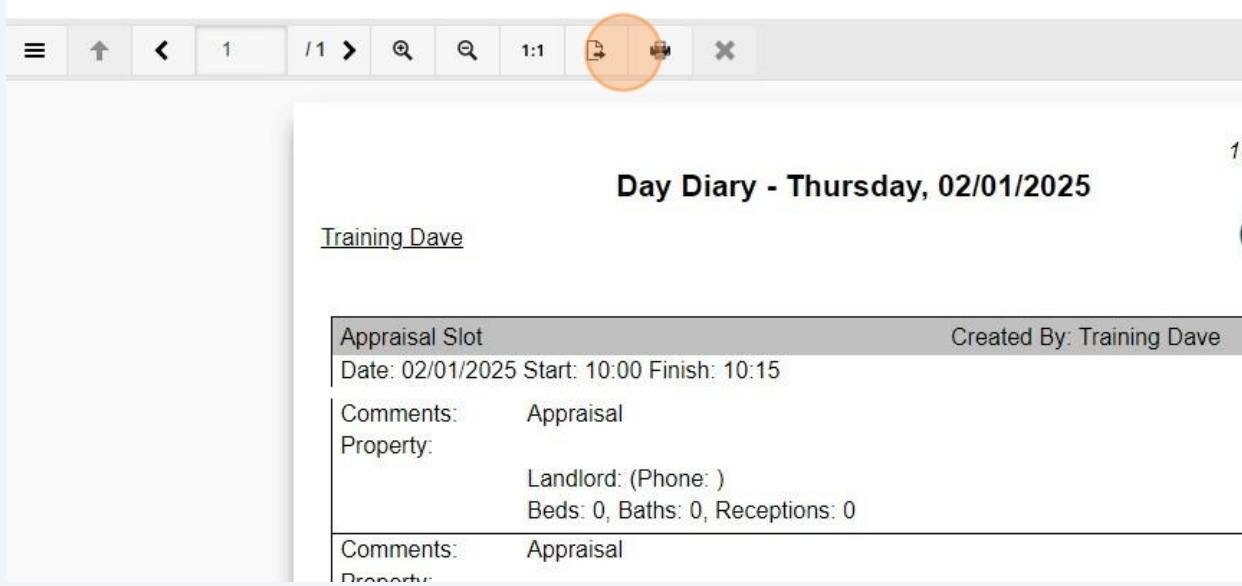
X

Available	Selected
Location	<input type="checkbox"/> Event Title ASC DESC trash
Additional Notes	<input type="checkbox"/> End Time ASC DESC trash
Event Type	<input type="checkbox"/> Start Time ASC DESC trash
Property_Address	
Asking Rent	
Asking Price	
Viewing Status	
Keys Held	

9 Click "Run Report"



10 The report will then be produced. The report does need to be exported/saved before you close it. Click the print icon to print or the icon to the left of the print icon to export.



11 Click "Close" to close the report and return to the main screen.

