

Running a Report in CRM



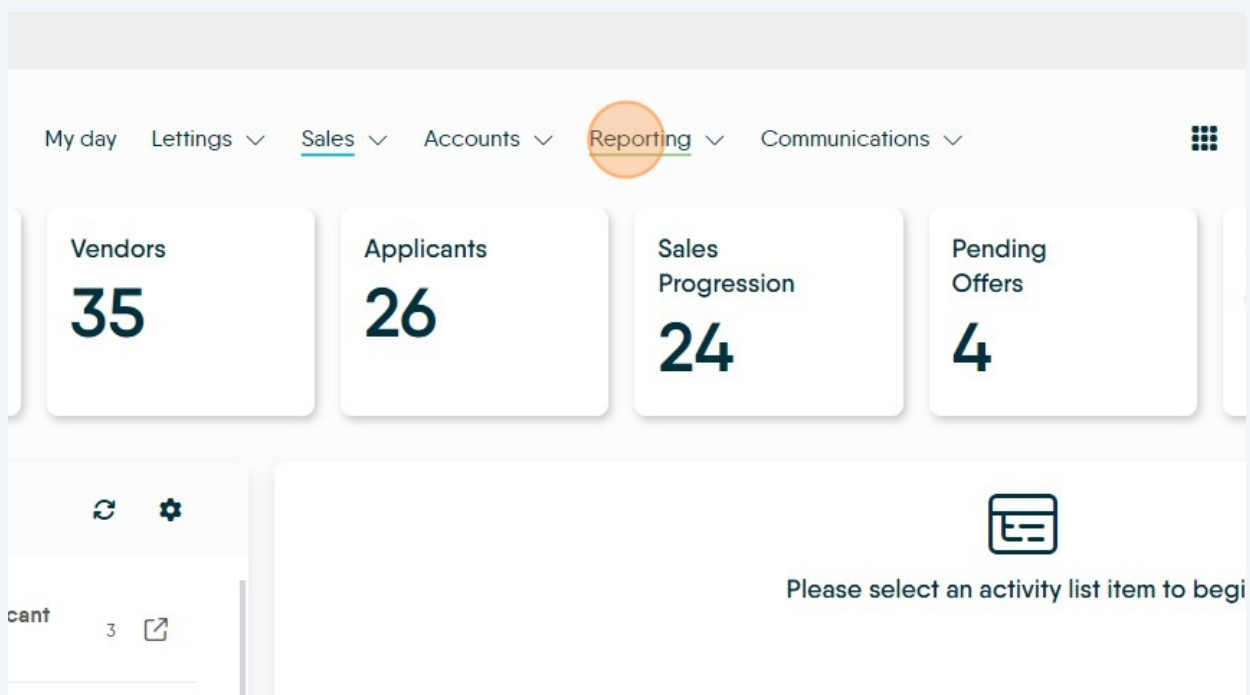
This guide provides a step-by-step for effectively running reports and managing appointments within the CRM system. Users will gain insights into navigating dashboards, creating reports, making it easier to track tasks and manage properties.

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.

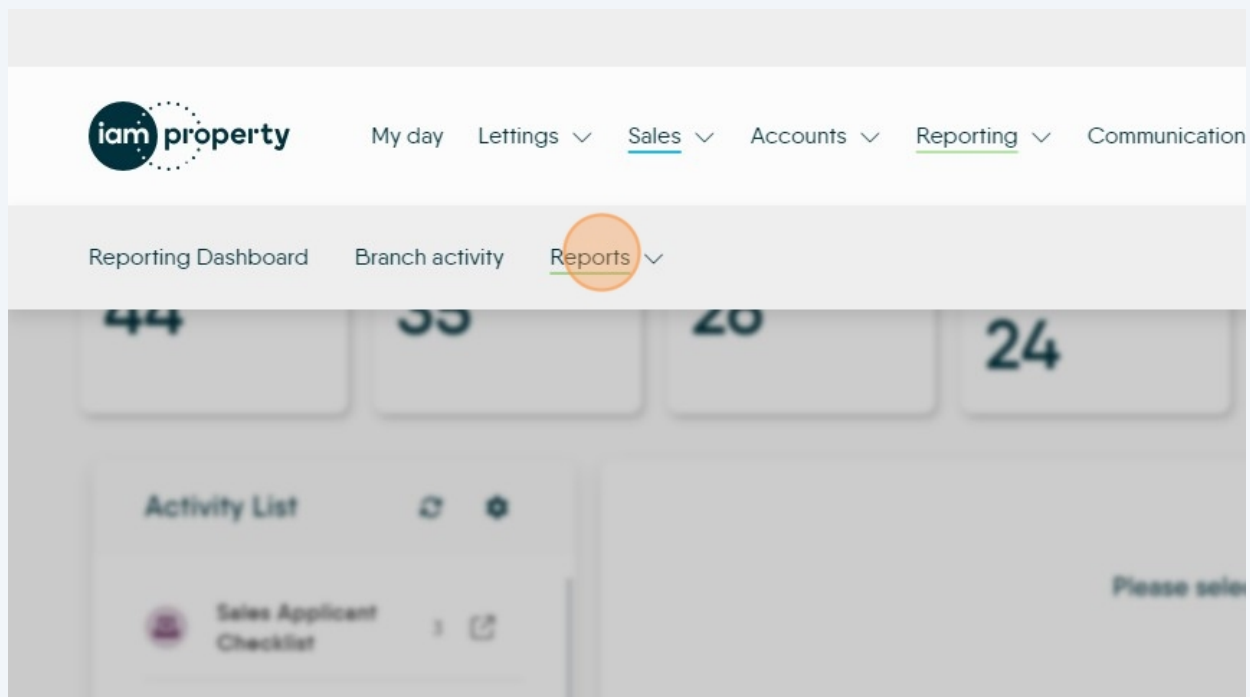
- 1 Navigate to <https://crm.iamproperty.com/MyDay>

Creating a Report

- 2 Click "Reporting"



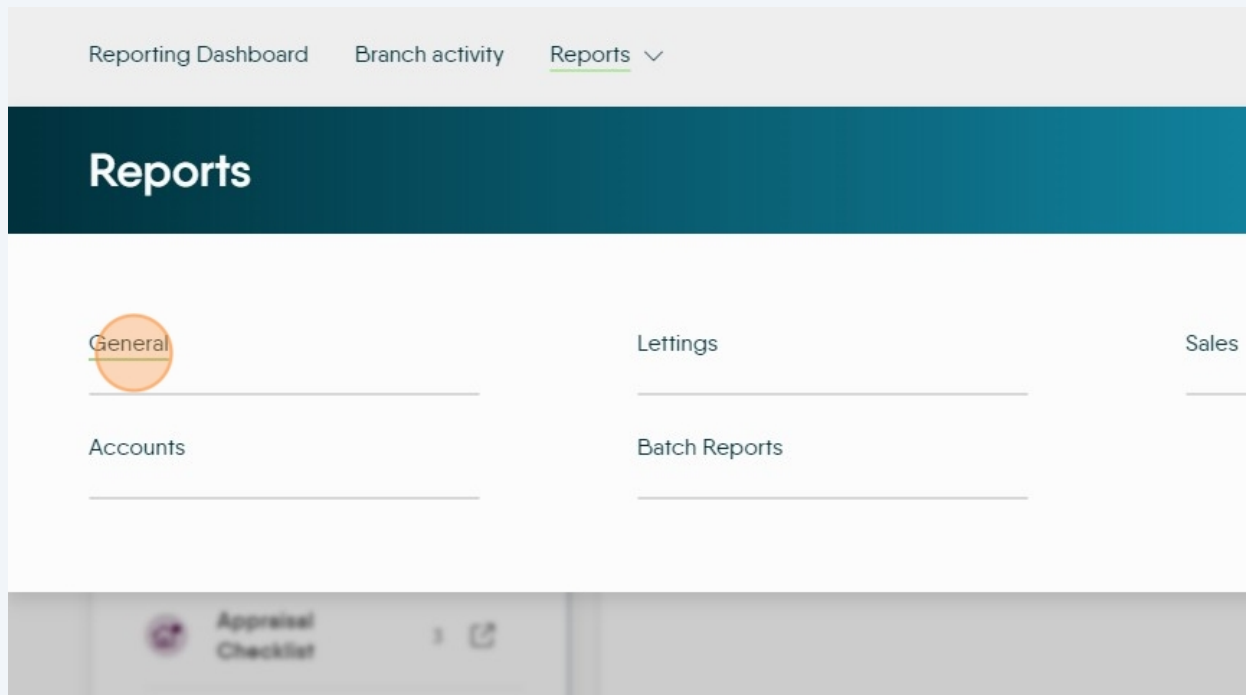
3 Click "Reports"



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

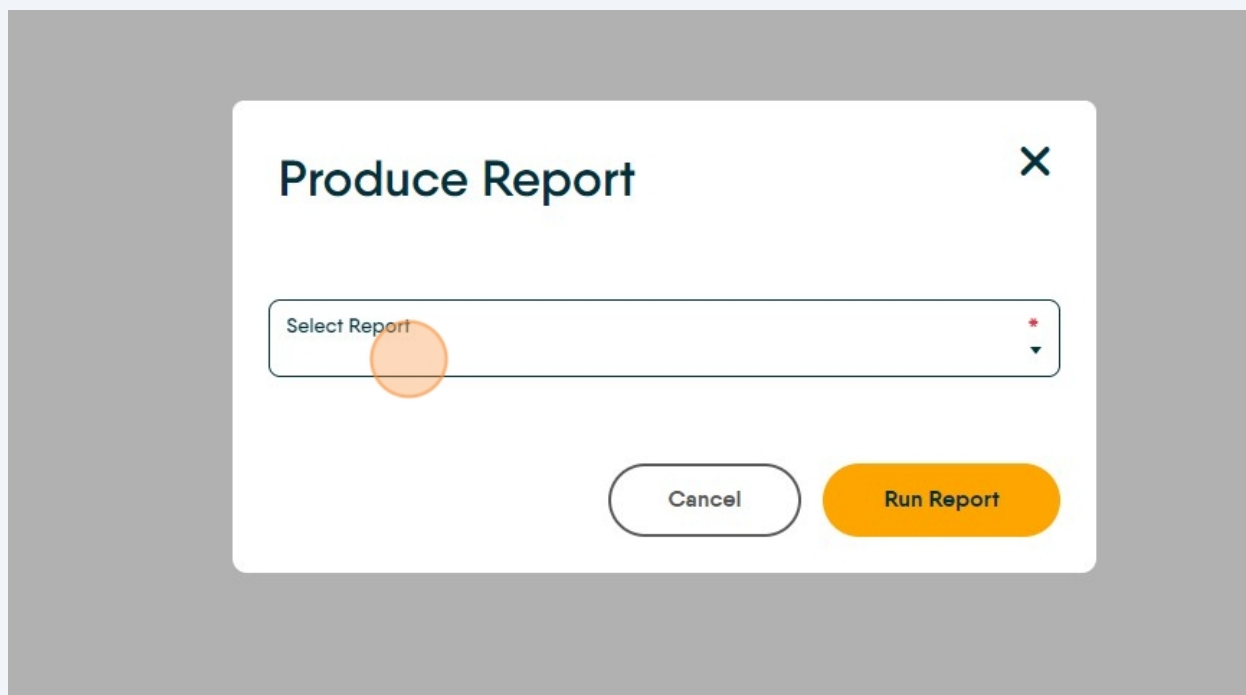
We are using the 'General' option for this guide.

- 4 Click "General" or any other category



- 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



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



Produce Report

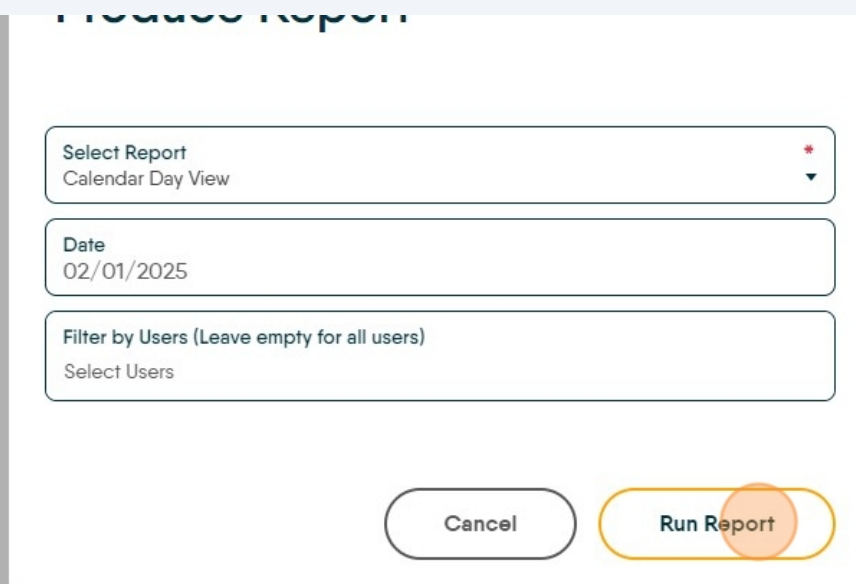
Select Report *

General

Calendar Day View

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



Produce Report

Select Report *
Calendar Day View

Date
02/01/2025

Filter by Users (Leave empty for all users)
Select Users









Cancel Run Report

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


















Specify Report Ordering



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





















Specify Report Ordering



Available		Selected
Start Time		 Event Title   
End Time		 End Time   
Location		
Additional Notes		
Event Type		
Property_Address		
Asking Rent		
Asking Price		
Viewing Status		





















Specify Report Ordering



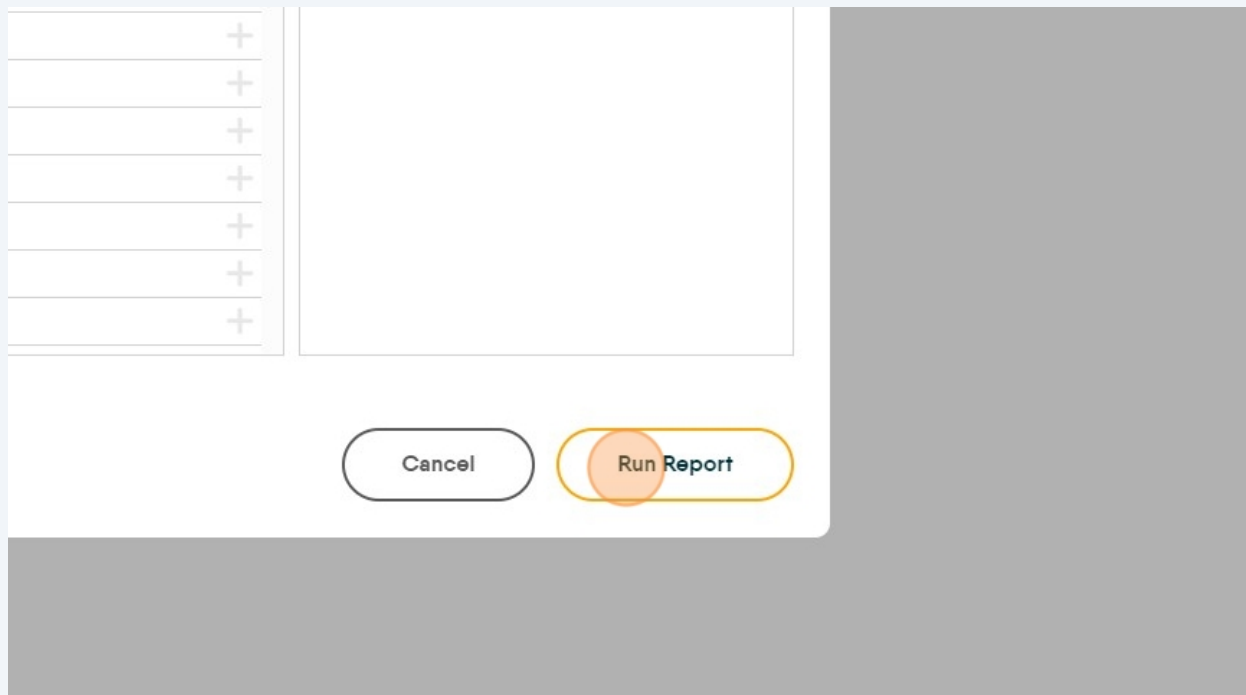
Available		Selected	
Start Time		 Event Title	  
Location		 End Time	  
Additional Notes		 Start Time	  
Event Type			
Property_Address			
Asking Rent			
Asking Price			
Viewing Status			

Specify Report Ordering



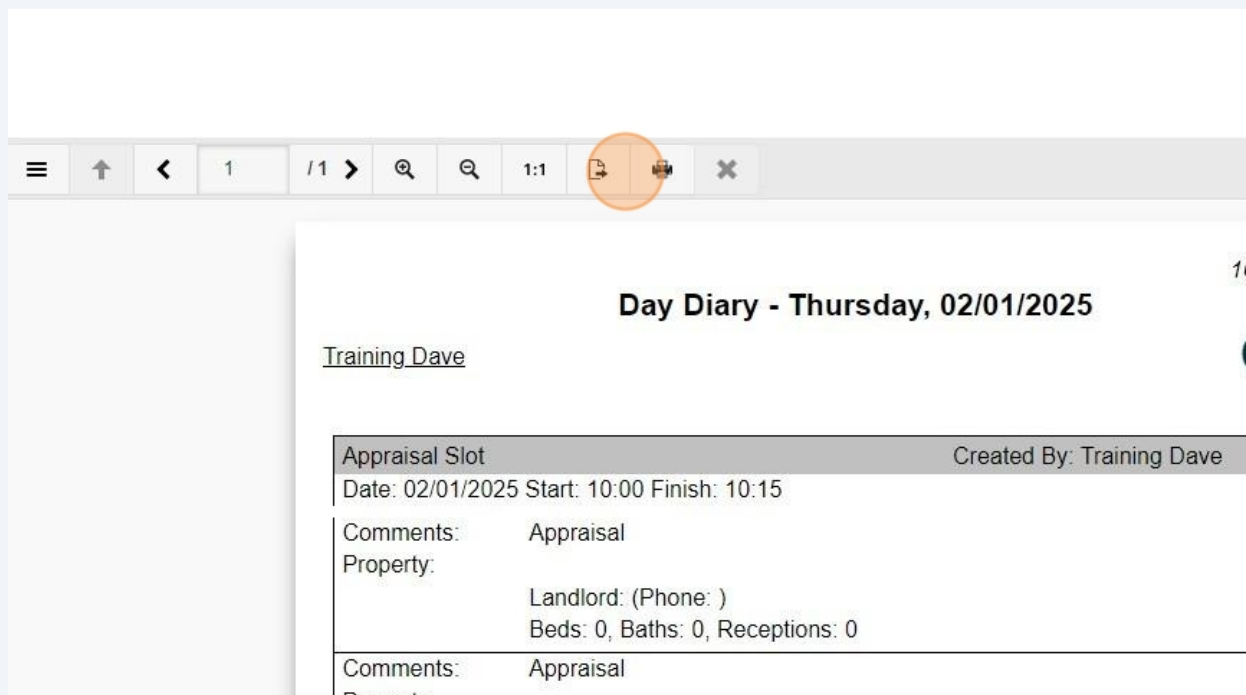
Available		Selected	
Location		 Event Title	  
Additional Notes		 End Time	  
Event Type		 Start Time	  
Property_Address			
Asking Rent			
Asking Price			
Viewing Status			
Keys Held			

9 Click "Run Report"



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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.

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Close

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Day Diary - Thursday, 02/01/2025

16:07 02/01/2025

iam property

Created By: Training Dave

Start: 10:00 Finish: 10:15

Appraisal

Landlord: (Phone:)

Visits: 0, Baths: 0, Receptions: 0

Appraisal