

# Property Management - Generating a Job Sheet Report in CRM

This guide provides a straightforward method for generating a Job Sheet report in the CRM system, essential for effective property management.

It outlines easy-to-follow steps that streamline the reporting process, allowing users to efficiently create and export job sheets in various formats.

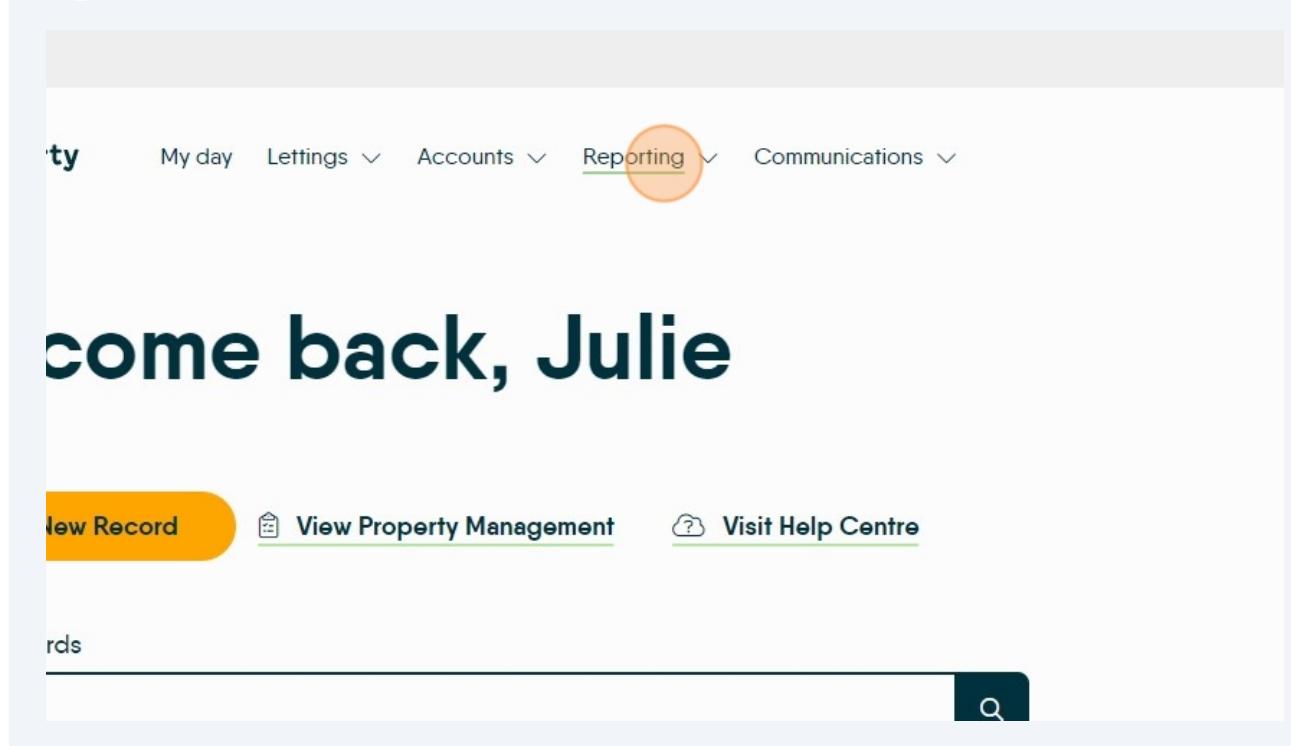
By utilising this guide, property managers can enhance their workflow and maintain organised records, ultimately improving their operational efficiency.

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

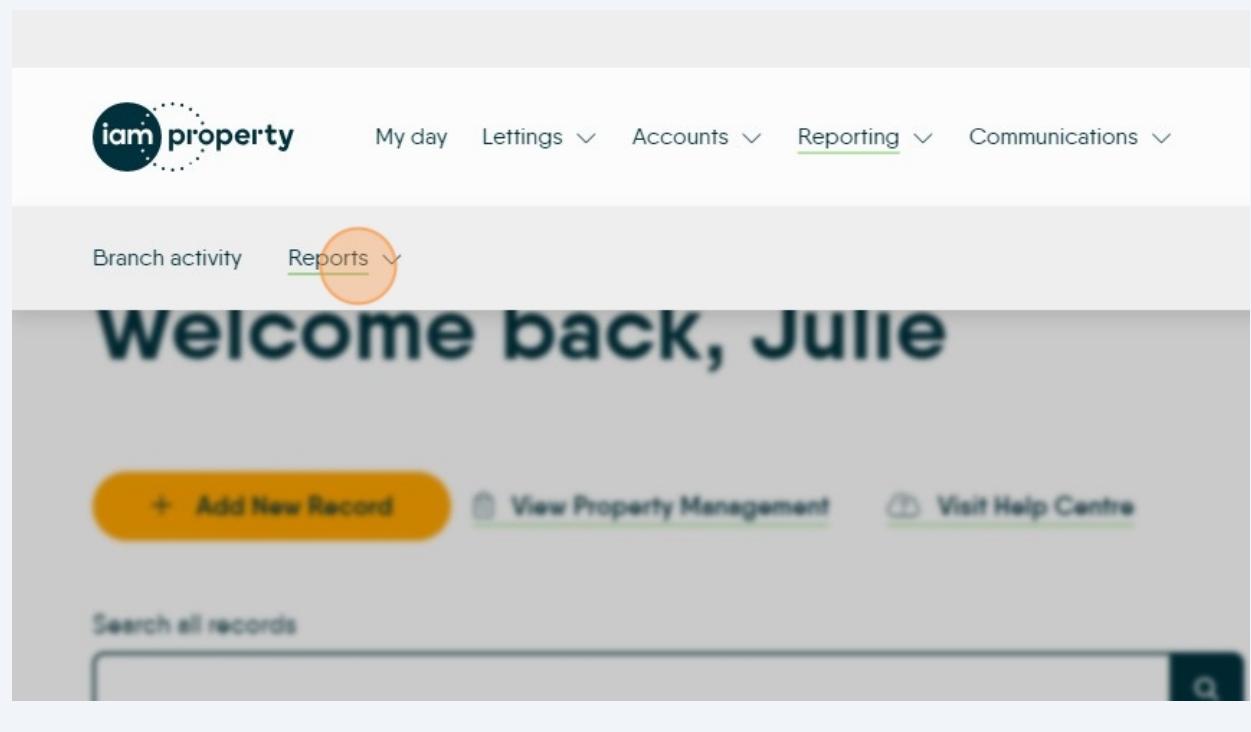


Alert! To use this guide you will need to have access to 'Reporting' in iamproperty CRM. If you **cannot** see the reporting options, please speak with your CRM administrator.

- 2 Click "Reporting"

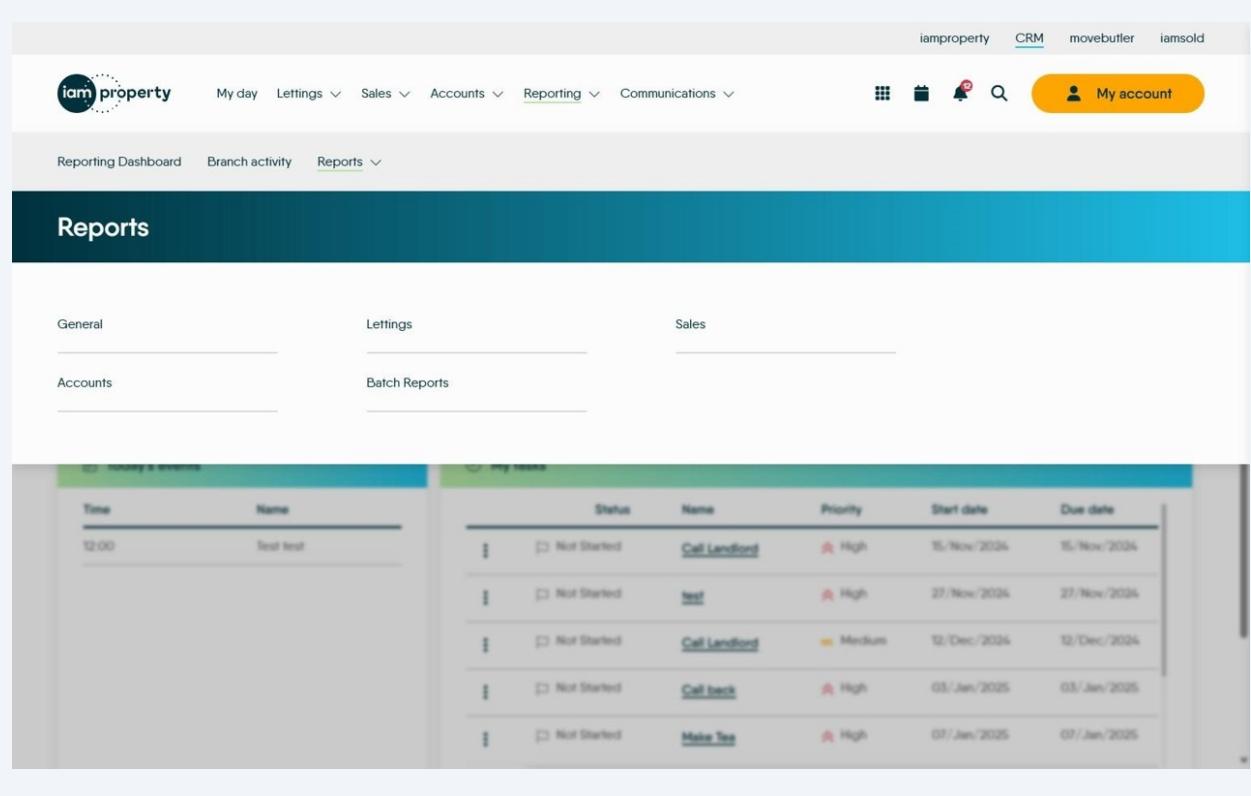
A screenshot of the iam property CRM interface. The top navigation bar includes 'My day', 'Lettings', 'Accounts', 'Reporting' (which is highlighted with a red circle), and 'Communications'. Below the navigation, a large banner displays the text 'come back, Julie'. At the bottom of the screen, there are three buttons: 'New Record' (orange), 'View Property Management' (green), and 'Visit Help Centre' (blue). A search bar is located at the very bottom.

3 Click "Reports"



The screenshot shows the iamproperty dashboard. At the top, there is a navigation bar with links: My day, Lettings, Accounts, Reporting (which is underlined and has an orange circle around it), and Communications. Below the navigation bar, the text "Welcome back, Julie" is displayed. There are three main buttons: "+ Add New Record" (yellow), "View Property Management" (green), and "Visit Help Centre" (green). A search bar with the placeholder "Search all records" is also present.

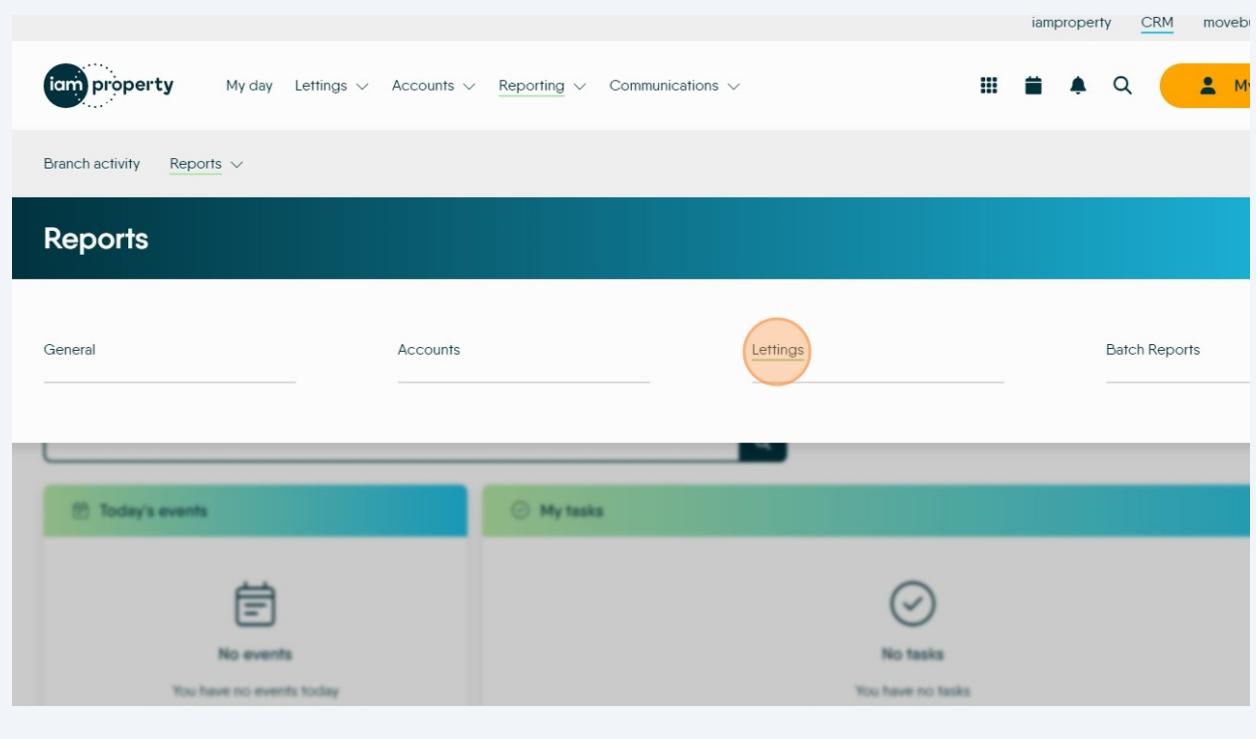
4 This will display all the reporting options that are enabled for your login.



The screenshot shows the "Reports" section of the iamproperty dashboard. The top navigation bar includes links for My day, Lettings, Sales, Accounts, Reporting (underlined), Communications, and a "My account" button. Below the navigation bar, there are several reporting categories: General, Lettings, Sales, Accounts, and Batch Reports. The "Reports" section is highlighted with a blue bar. At the bottom, there is a table titled "My tasks" showing a list of tasks with columns for Time, Name, Status, Name, Priority, Start date, and Due date. The tasks listed are: "12:00 Test Test" (Not Started, High, 15/Nov/2024, 15/Nov/2024), "Test test" (Not Started, High, 27/Nov/2024, 27/Nov/2024), "Call Landlord" (Not Started, Medium, 12/Dec/2024, 12/Dec/2024), "Call back" (Not Started, High, 03/Jan/2025, 03/Jan/2025), and "Make Tee" (Not Started, High, 07/Jan/2025, 07/Jan/2025).

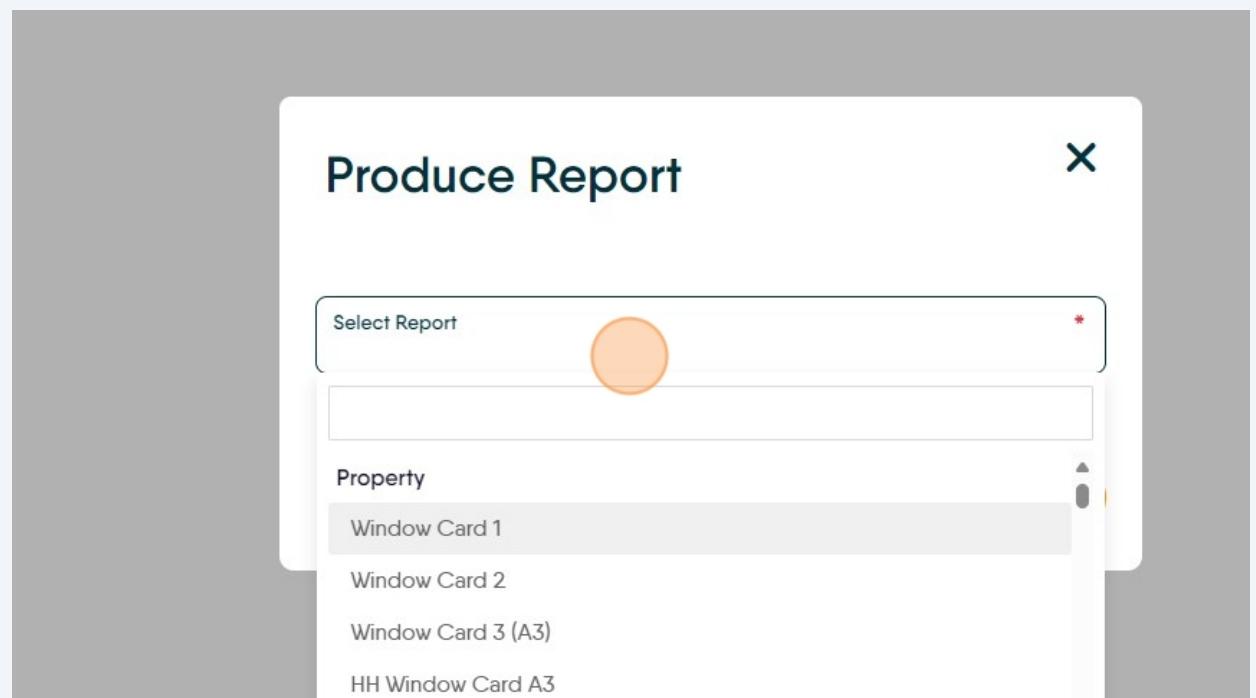
Time	Name	Status	Name	Priority	Start date	Due date
12:00	Test Test	Not Started	Call Landlord	High	15/Nov/2024	15/Nov/2024
		Not Started	Test test	High	27/Nov/2024	27/Nov/2024
		Not Started	Call Landlord	Medium	12/Dec/2024	12/Dec/2024
		Not Started	Call back	High	03/Jan/2025	03/Jan/2025
		Not Started	Make Tee	High	07/Jan/2025	07/Jan/2025

5 For this example we will use Lettings Reports. Click "Lettings"



The screenshot shows the software's main navigation bar with options like 'My day', 'Lettings', 'Accounts', 'Reporting', 'Communications', and 'Branch activity'. Below this is a 'Reports' dropdown. The main content area is titled 'Reports' and contains four tabs: 'General', 'Accounts', 'Lettings' (which is circled in orange), and 'Batch Reports'. Below these tabs are two sections: 'Today's events' (showing 'No events' and the message 'You have no events today') and 'My tasks' (showing 'No tasks' and the message 'You have no tasks').

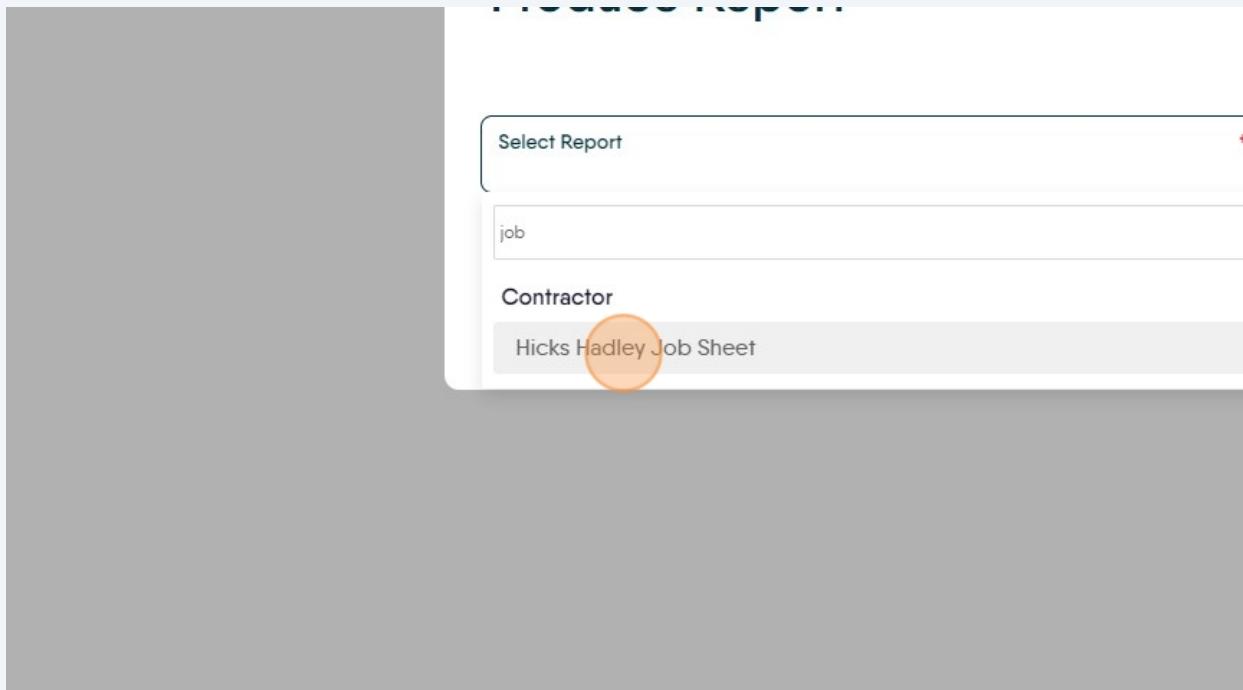
6 Click here to see the list of reports or search.



The dialog box is titled 'Produce Report' and contains a 'Select Report' field with a red asterisk indicating it is required. Below this is a dropdown menu labeled 'Property' with options: 'Window Card 1' (which is highlighted with an orange circle), 'Window Card 2', 'Window Card 3 (A3)', and 'HH Window Card A3'.

7 Start typing the name of the report or scroll the list. For example, Type "job" this will filter for just the job sheet report.

8 Click "... Job Sheet"



9 From the select task list. Click the job you want to create the Job Sheet for.

## Produce Report X

Select Report \*  
Hicks Hadley Job Sheet ▼

Select Task \*  
#457010 - Gas Heating - Live - 50 Park (highlighted)

#457010 - Gas Heating - Live -  
Midlands, UK

#456985 - Fence - Live - 6 Hun  
Birmingham, UK

#456752 - Tree - Live - 6 Goldt  
Hill, West Midlands, UK

10 Click "Run Report"

Job Sheet \*  
Gas Heating - Live - 50 Park, Midlands, UK ▼

Cancel Run Report

## 11 Job Sheet is created.

The job sheet can be exported to Word or PDF, or printed from here by selecting the Export or Print icons

