Generating a Report in CRM

This guide provides a straightforward process for generating a Report in your CRM system, ensuring that you can efficiently report on a large variety of option within the CRM

By following these steps, you can easily access, print, or export data, which is crucial for maintaining a smooth running business.

Viewing this guide will save you time and streamline your reporting efforts, enhancing your operational efficiency.
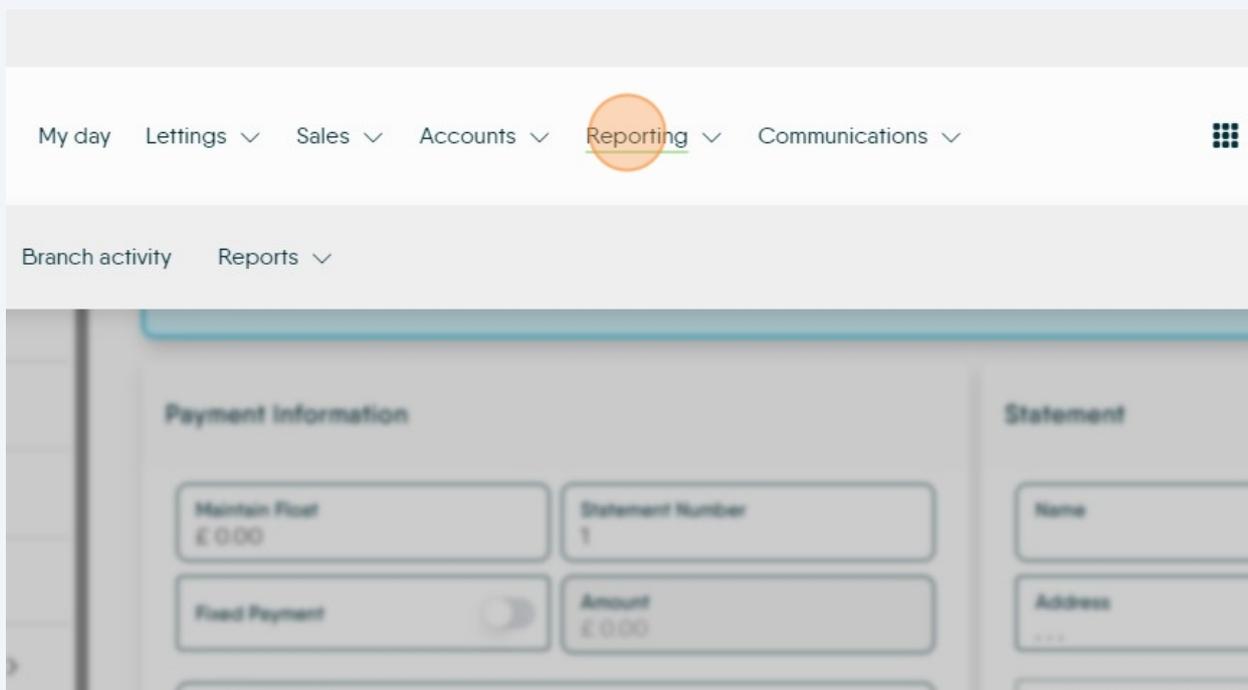
(i) This guide will look at the basics of finding a report and producing the report data in a usable format.
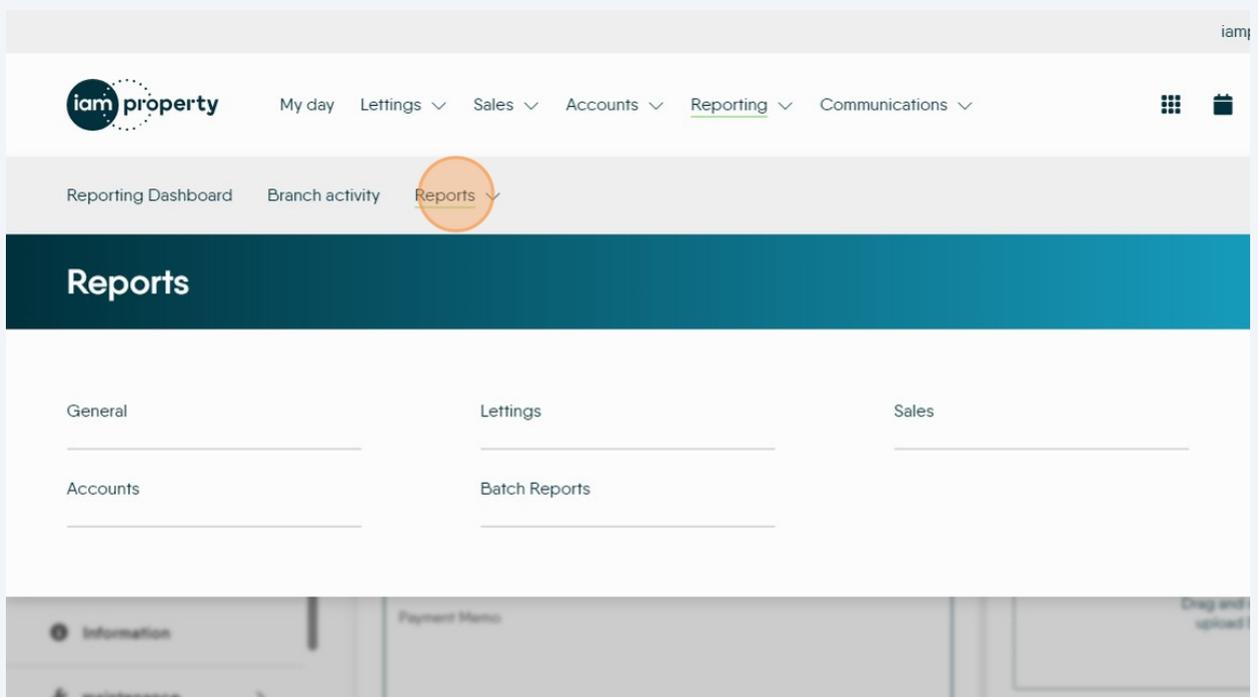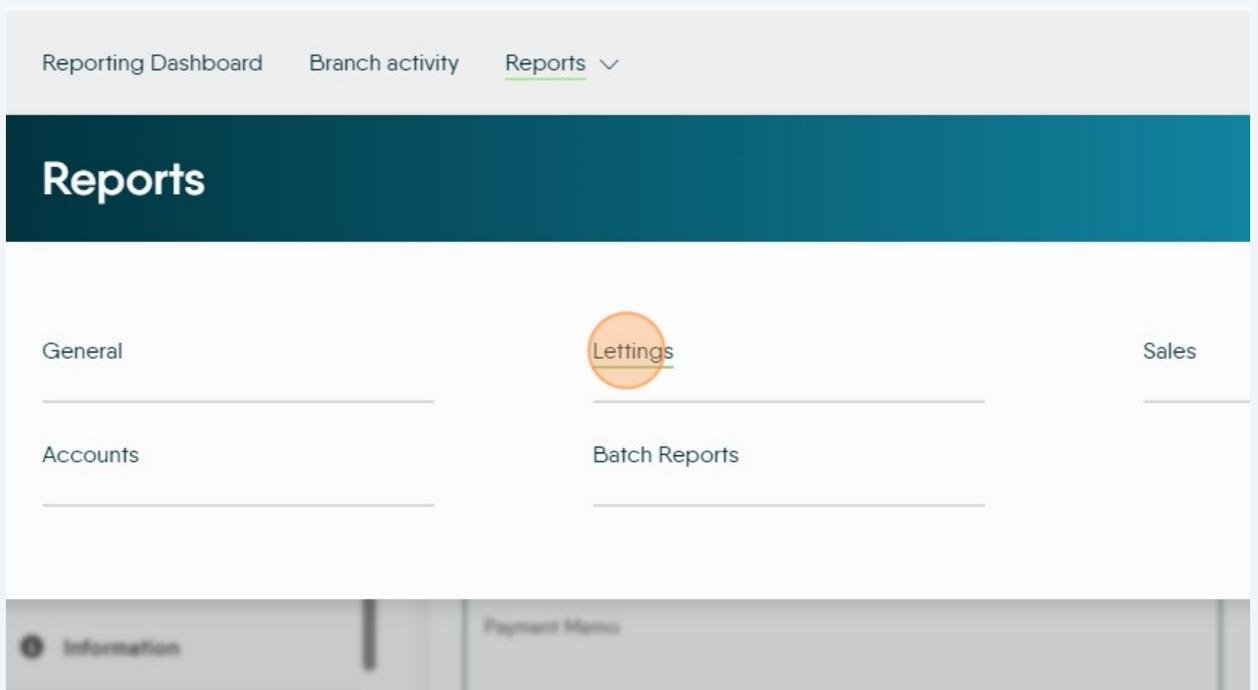
1 Navigate to
https://crm.iamproperty.com/Lettings/Property/Record/10614491#payment

2 Click "Reporting"

3 Click "Reports" from the menu select the option you wish to use.
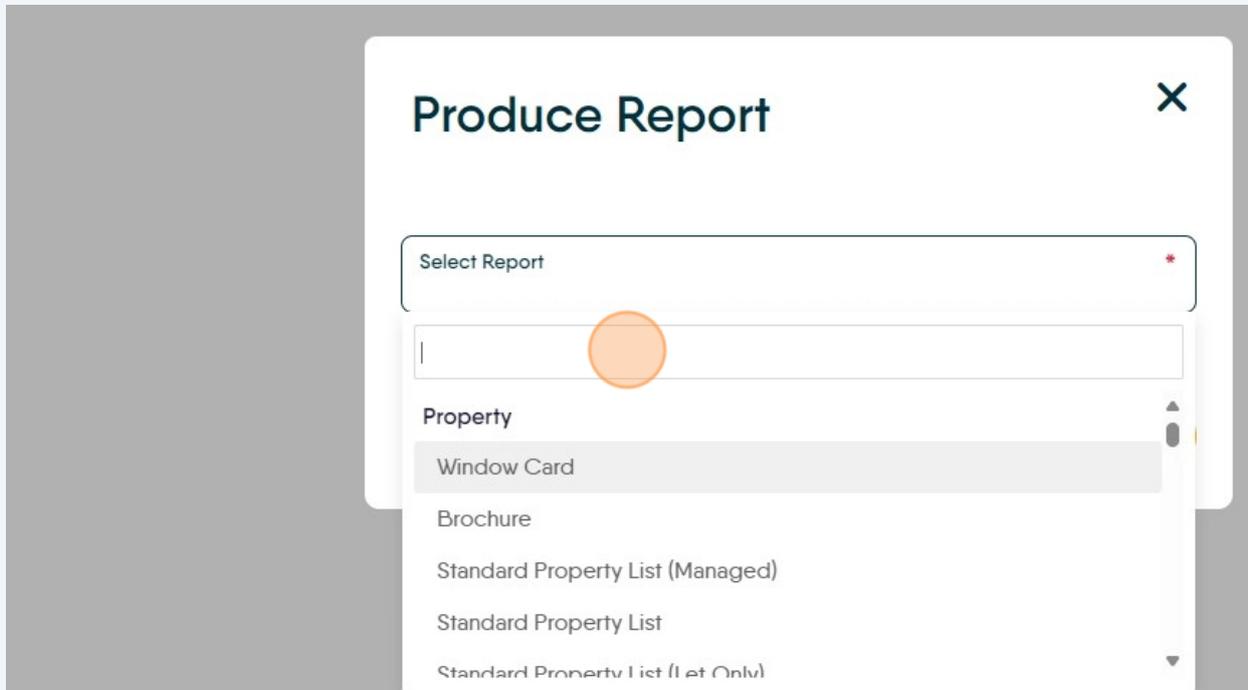

4 For example; Click "Lettings"

5 Once the menu option is selected you will see a list of the related reports for that section, these will be standard reports and reports you have requested/selected.

Click into the drop down menu. Search for the report you require by typing in the search field or scroll down the list.

Produce Report ✕

Select Report *

Property

Window Card

Brochure

Standard Property List (Managed)

Standard Property List

Standard Property List (Let Only)

⚠ Alert! In this guide we are looking at creating a Compliance report for Lettings properties as an example of the process.

6 Click "Standard Compliance checks due" (in this example)
Complete any additional options.
Click "Run Report"

Produce Report

Select Report   *

compl

Property

Standard Compliance checks due

Produce Report

Select Report   *
Standard Compliance checks due   ▼

Number of Days   *

Select Safety Check
All Safety Checks   ▼

Cancel   **Run Report**

Produce Report ✕

Select Report *
Standard Compliance checks due ▾

Number of Days *
30

Select Safety Check
All Safety Checks

All Safety Checks

Gas Safety

Fixed Wiring (EICR)

Appliances

Oil Service

Produce Report ✕

Select Report *
Standard Compliance checks due ▾

Number of Days *
30

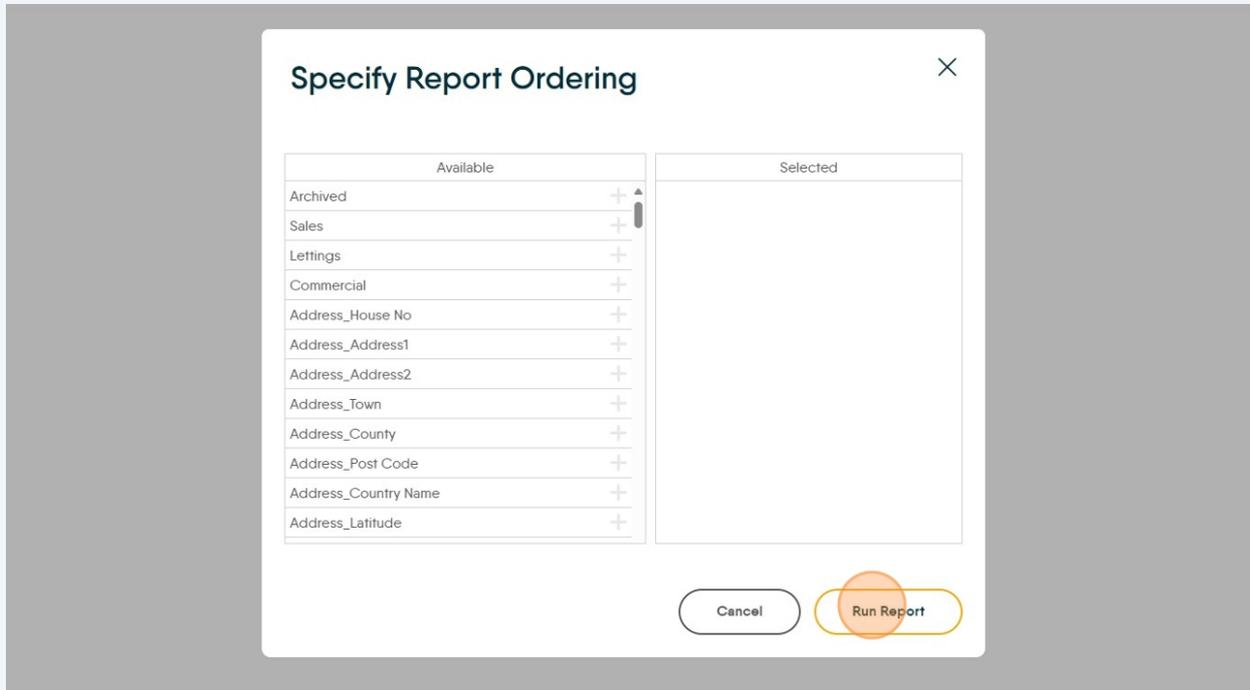Select Safety Check
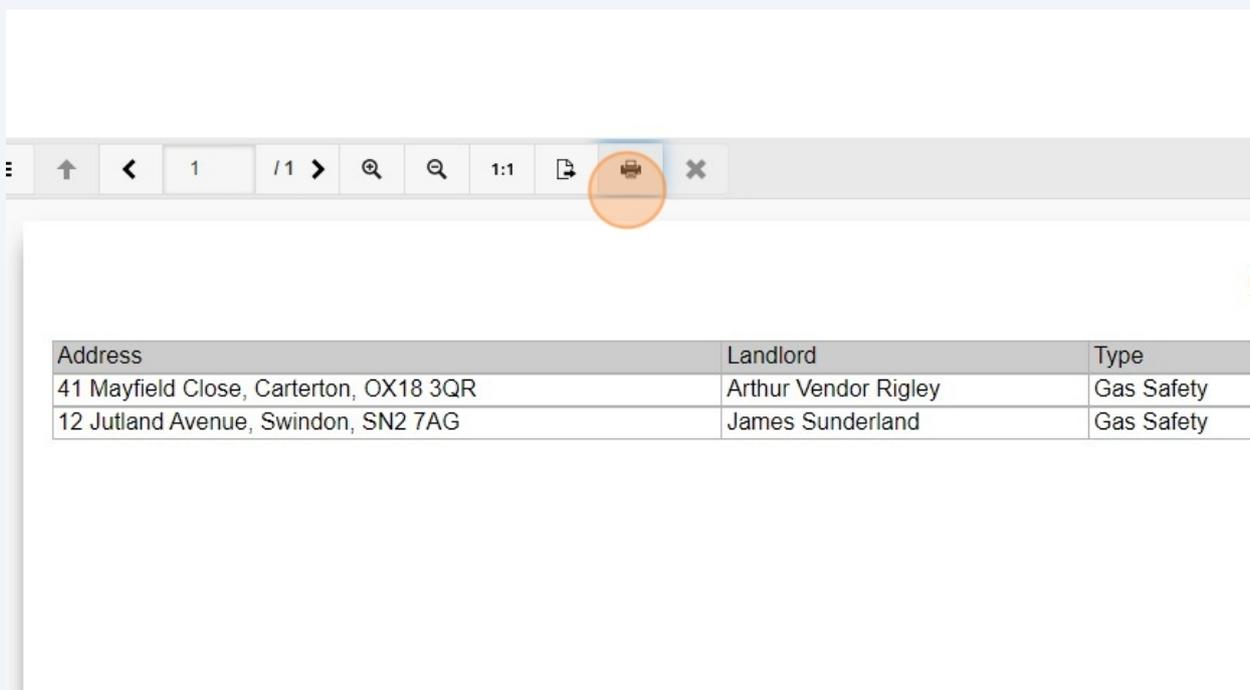All Safety Checks ▾

Cancel   Run Report

7 You may be shown some additional options (as shown) used to sort the file these are optional.

Complete any options in the next screen, in this case no additional options need to be selected. Click "Run Report"
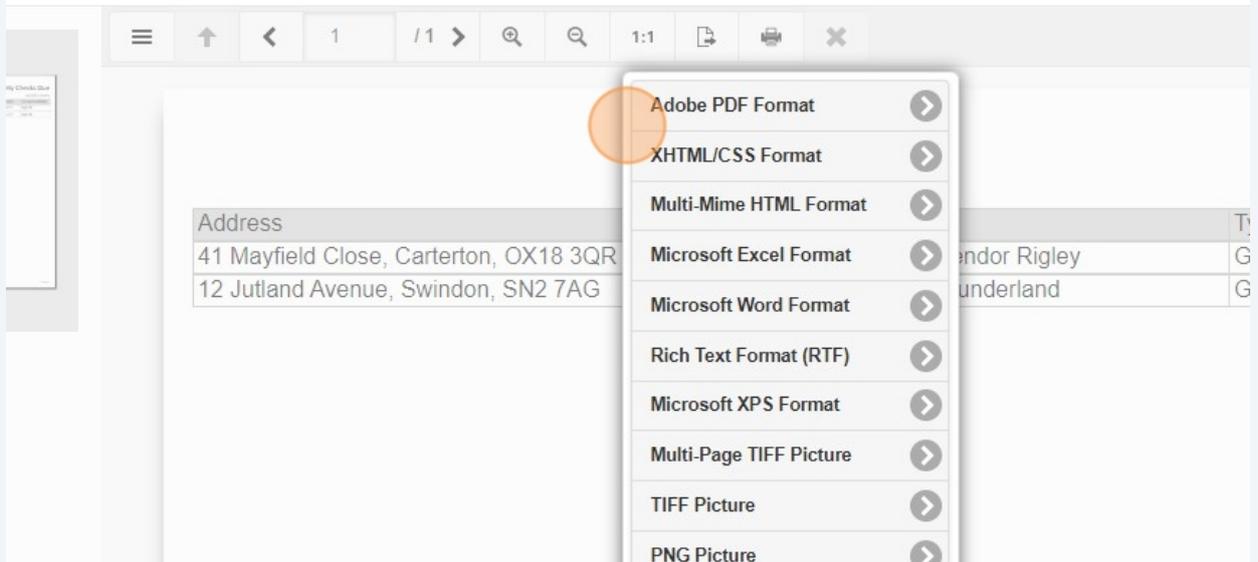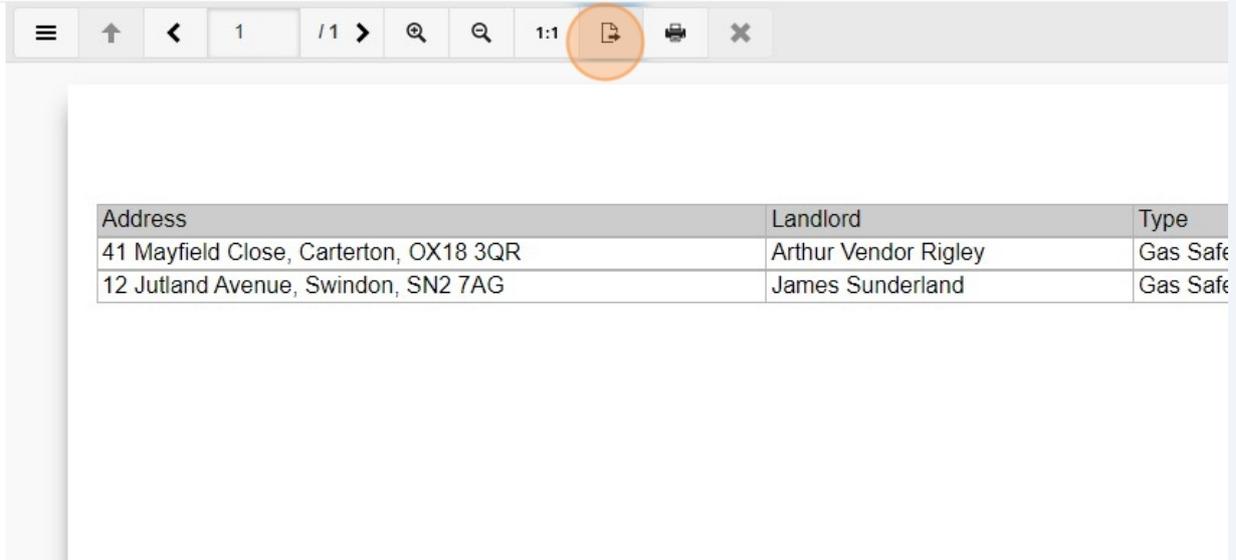

8 Your report will show on the screen. Click "Print" to print the document.

9 Or Click "Export" to create a specific file type e.g. PDF or Excel. Pick the file type from the drop down list.

Address	Landlord	Type
41 Mayfield Close, Carterton, OX18 3QR	Arthur Vendor Rigley	Gas Safe
12 Jutland Avenue, Swindon, SN2 7AG	James Sunderland	Gas Safe

Address		Ty
41 Mayfield Close, Carterton, OX18 3QR	endor Rigley	G
12 Jutland Avenue, Swindon, SN2 7AG	underland	G

Adobe PDF Format ⊳

XHTML/CSS Format ⊳

Multi-Mime HTML Format ⊳

Microsoft Excel Format ⊳

Microsoft Word Format ⊳

Rich Text Format (RTF) ⊳

Microsoft XPS Format ⊳

Multi-Page TIFF Picture ⊳

TIFF Picture ⊳

PNG Picture ⊳

10 Then click on 'Close' to return to the reports screen.