

Generating a Safety Compliance Report in CRM



This guide provides a straightforward process for generating a Safety Compliance Report in your CRM system, ensuring that you can efficiently track essential safety checks for properties.

By following these steps, you can easily access, print, or export compliance data, which is crucial for maintaining safety standards and regulatory compliance in property management.

Viewing this guide will save you time and streamline your reporting efforts, enhancing your operational efficiency.

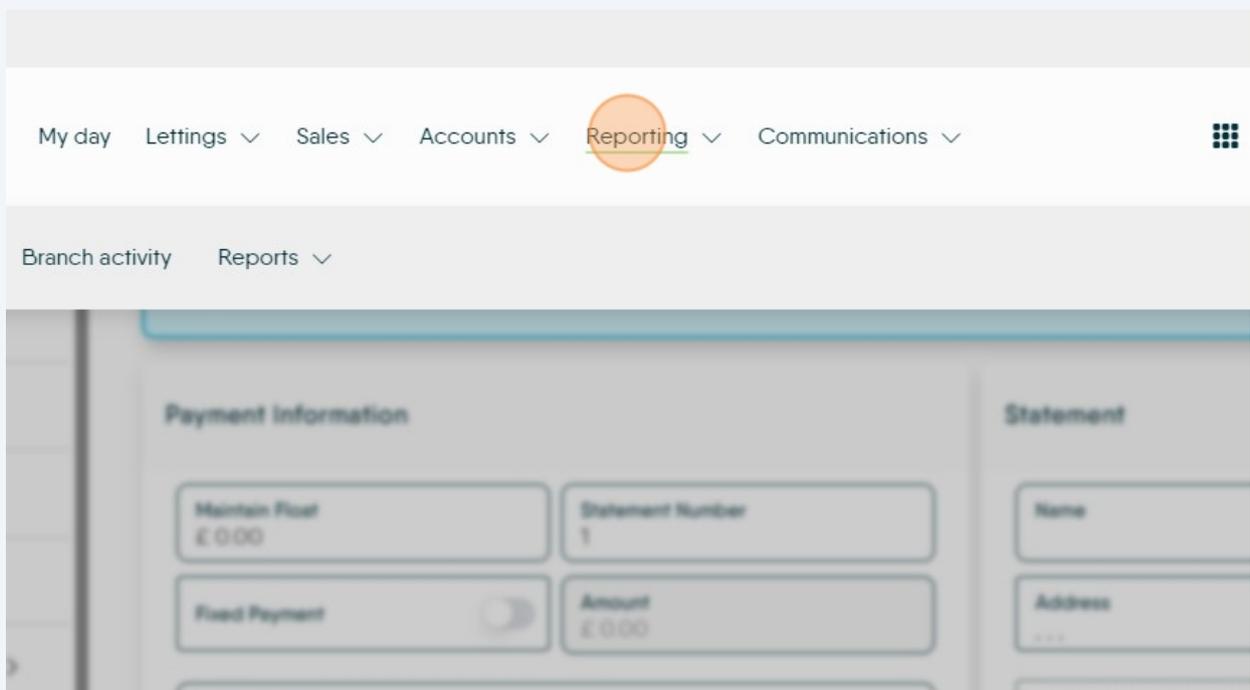
1

Navigate to

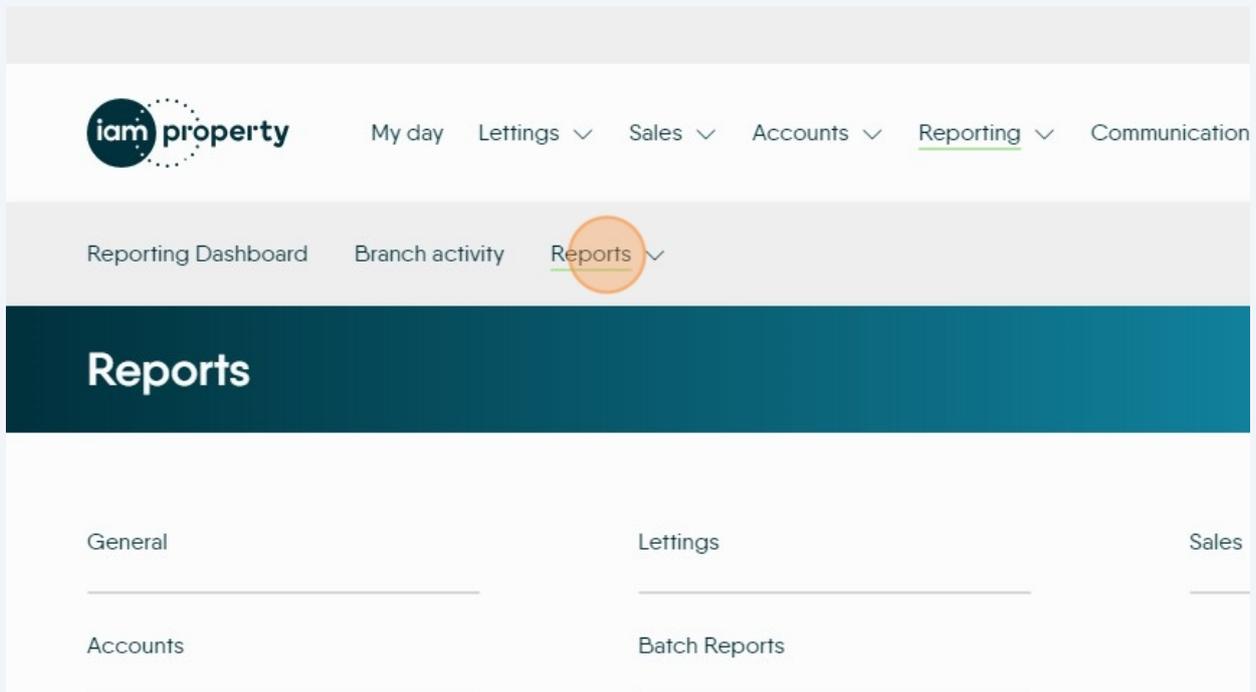
<https://crm.iamproperty.com/Lettings/Property/Record/10614491#payment>

2

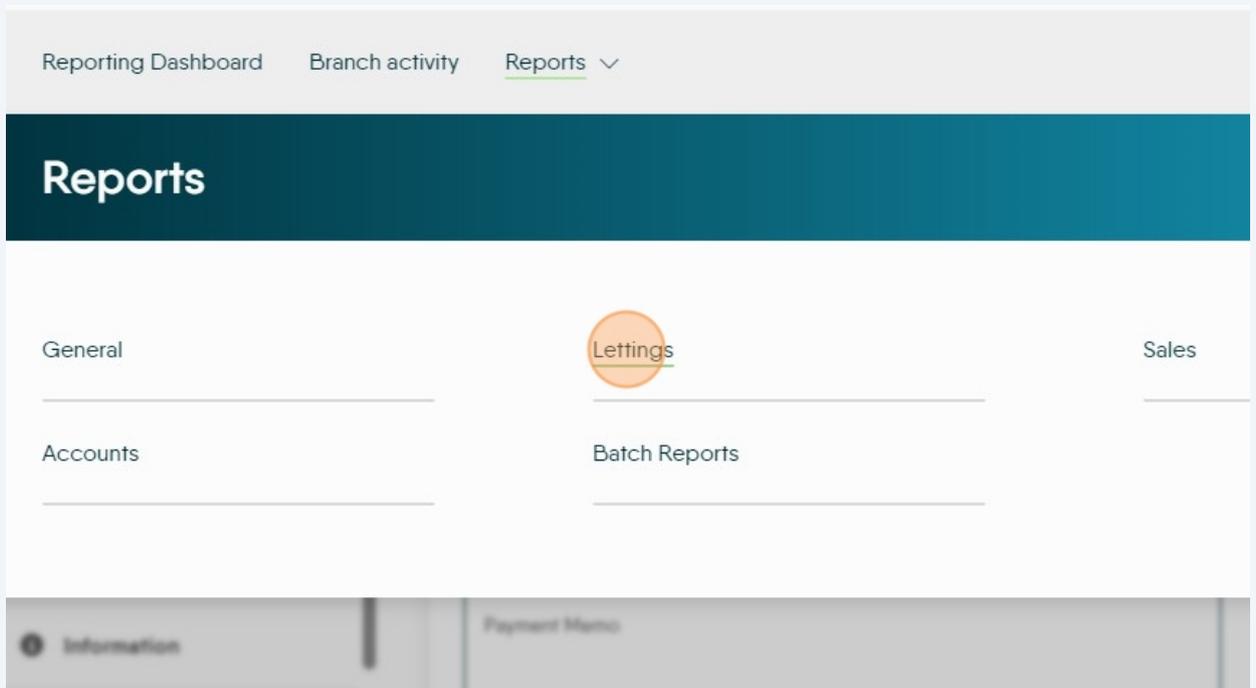
Click "Reporting"



3 Click "Reports"

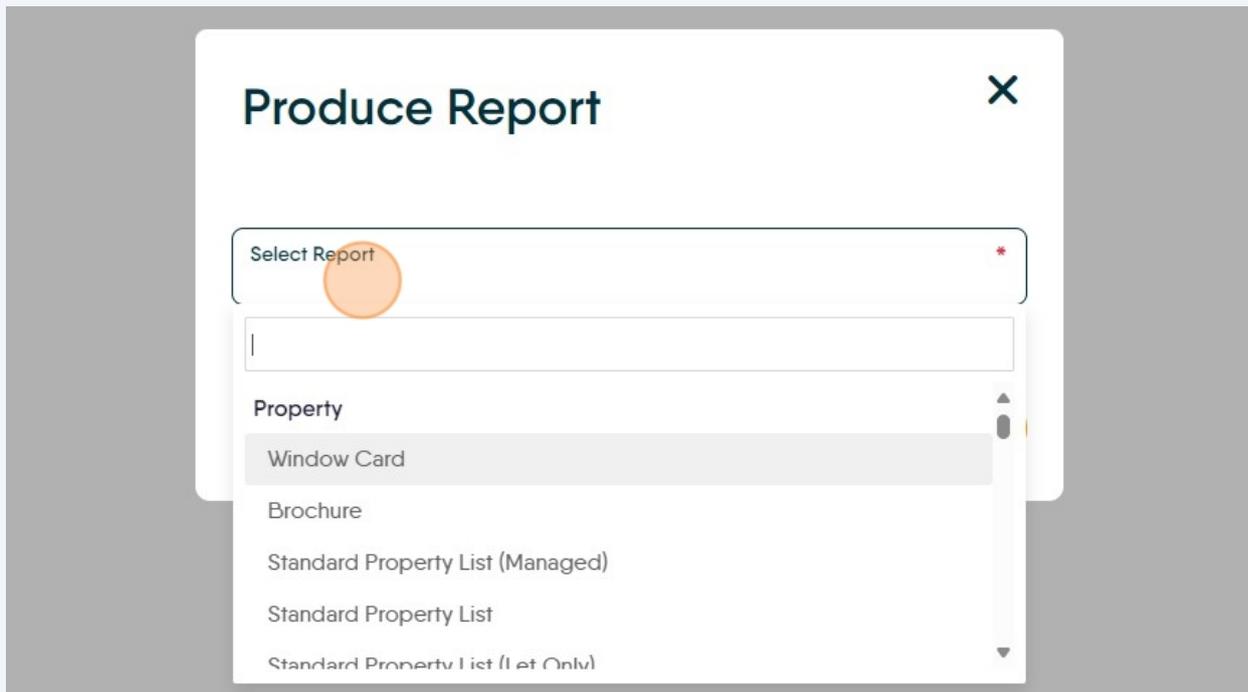


4 Click "Lettings"



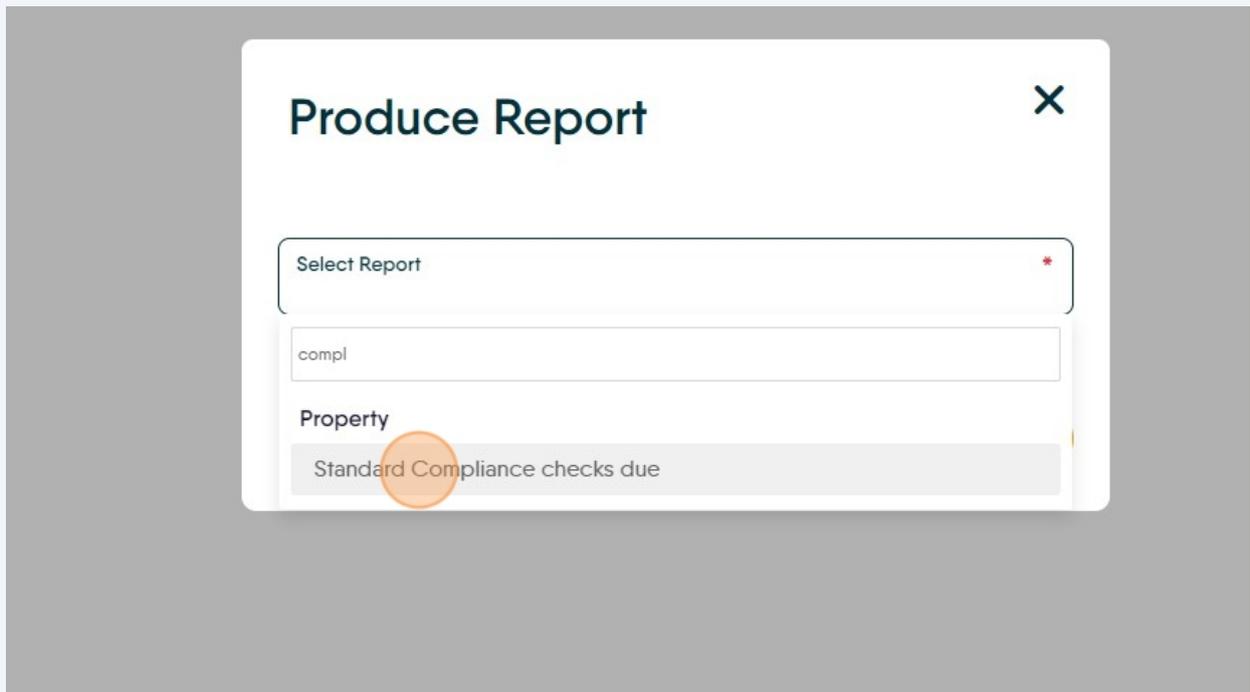
5

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



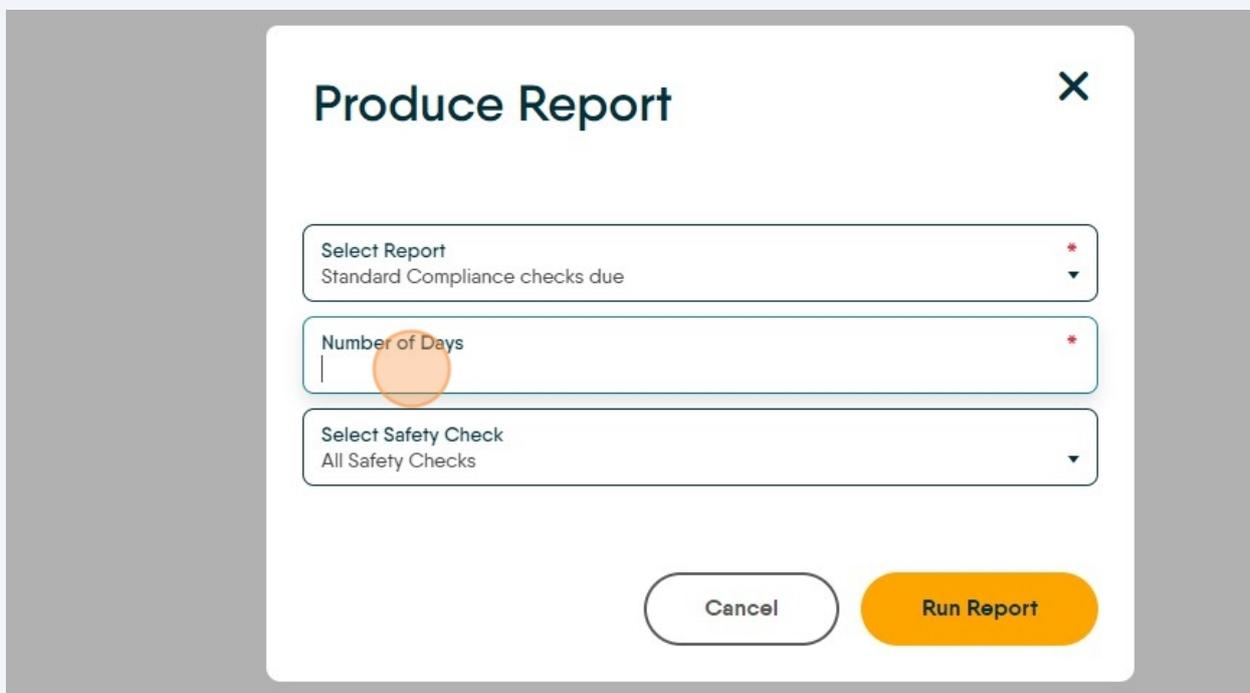
Alert! In this guide we are looking at creating a Compliance report for Lettings properties.

6 Click "Standard Compliance checks due" (in this example)



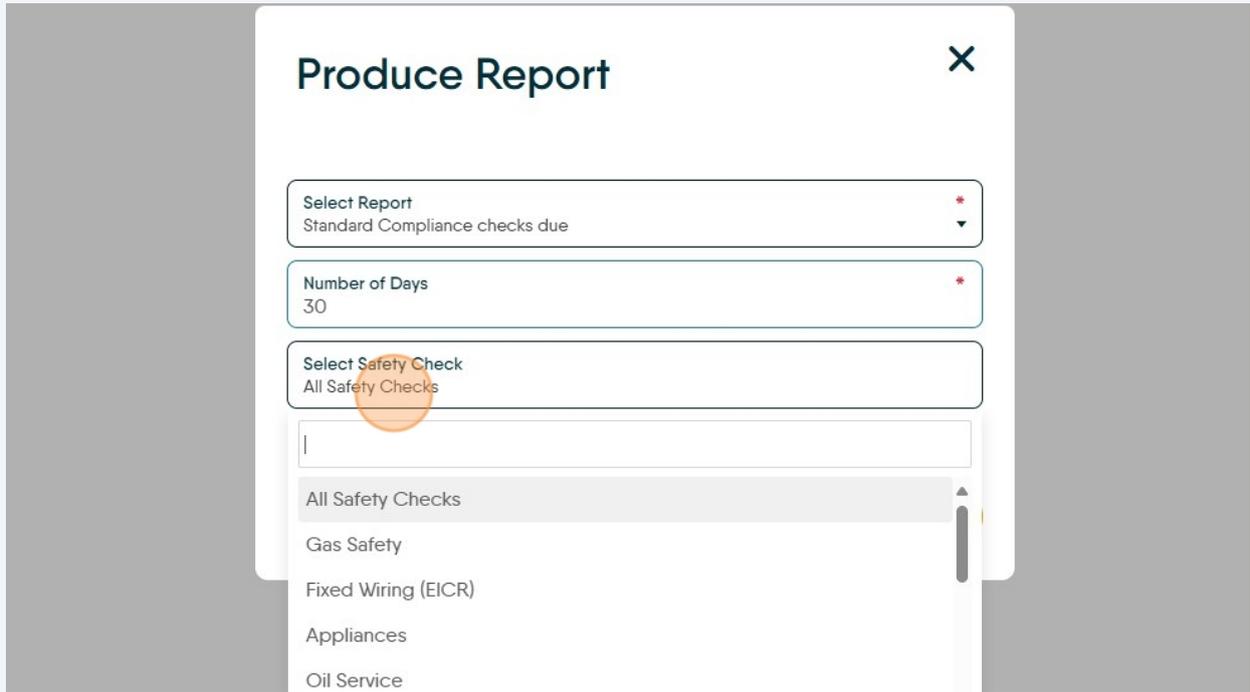
The screenshot shows a dialog box titled "Produce Report" with a close button (X) in the top right corner. Below the title is a "Select Report" dropdown menu with a red asterisk. The dropdown is open, showing a search input field containing "compl" and a list of options. The option "Standard Compliance checks due" is highlighted and circled in orange. Below the dropdown is a "Property" label.

7 Click the "Number of Days" field.



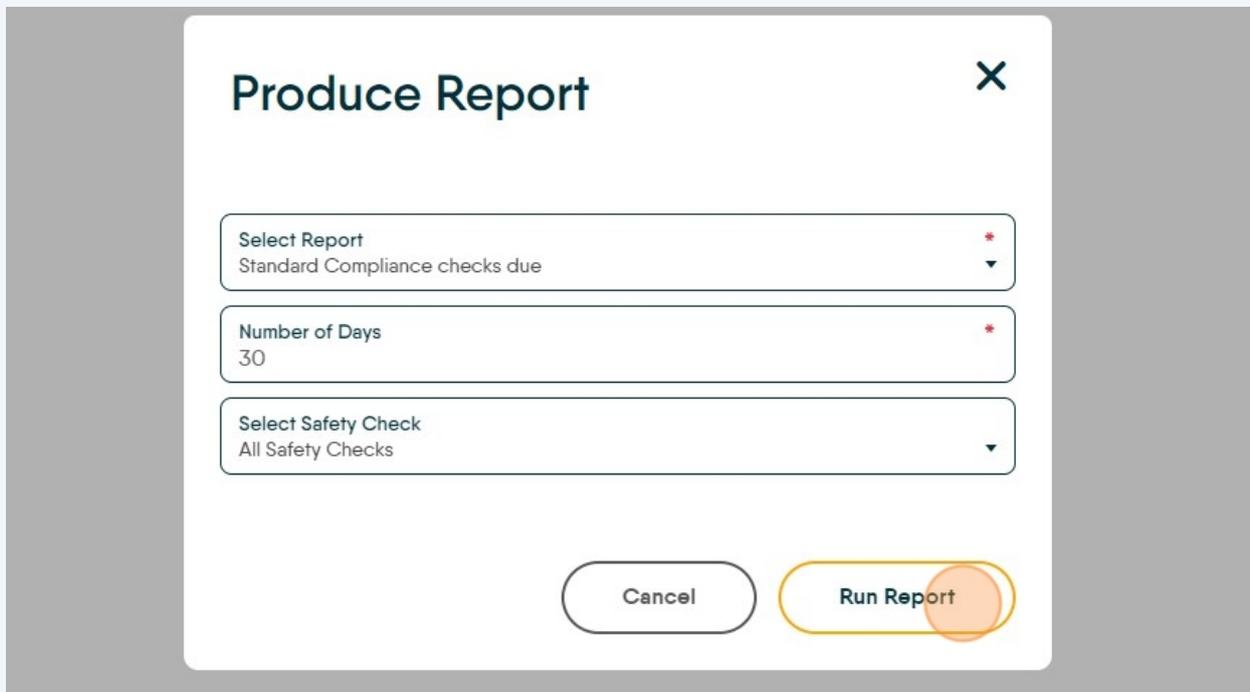
The screenshot shows the "Produce Report" dialog box with the "Standard Compliance checks due" report selected in the "Select Report" dropdown. The "Number of Days" input field is highlighted with an orange circle. Below it is the "Select Safety Check" dropdown menu, which is currently set to "All Safety Checks". At the bottom of the dialog are two buttons: "Cancel" and "Run Report".

8 Click "All Safety Checks" or the option you are wanting to create.



The screenshot shows a 'Produce Report' dialog box with a close button (X) in the top right corner. It contains three input fields: 'Select Report' with the value 'Standard Compliance checks due', 'Number of Days' with the value '30', and 'Select Safety Check' with the value 'All Safety Checks'. The 'Select Safety Check' dropdown menu is open, showing a list of options: 'All Safety Checks', 'Gas Safety', 'Fixed Wiring (EICR)', 'Appliances', and 'Oil Service'. An orange circle highlights the 'All Safety Checks' option in the dropdown menu.

9 Click "Run Report"



The screenshot shows the same 'Produce Report' dialog box as in the previous step. The 'Select Safety Check' dropdown menu is now closed, and the 'Run Report' button is highlighted with an orange circle. The 'Cancel' button is also visible next to it.

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

Lettings	+
Commercial	+
Address_House No	+
Address_Address1	+
Address_Address2	+
Address_Town	+
Address_County	+
Address_Post Code	+
Address_Country Name	+
Address_Latitude	+

Cancel Run Report

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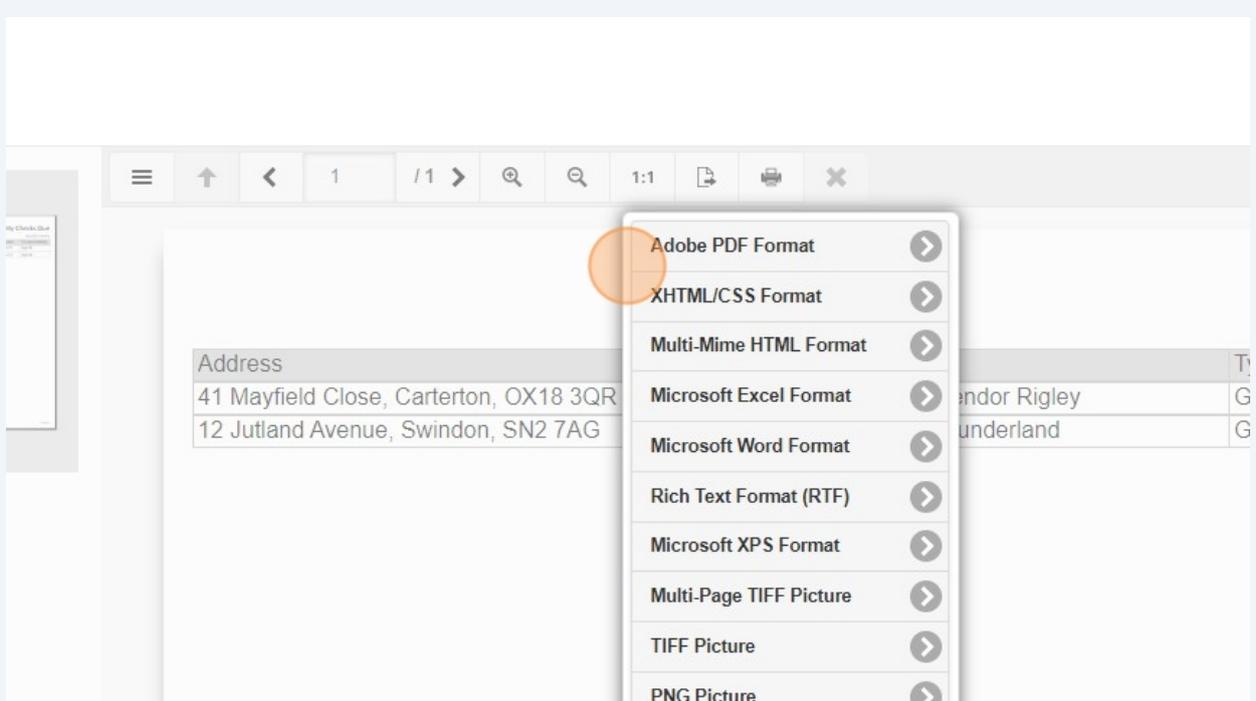
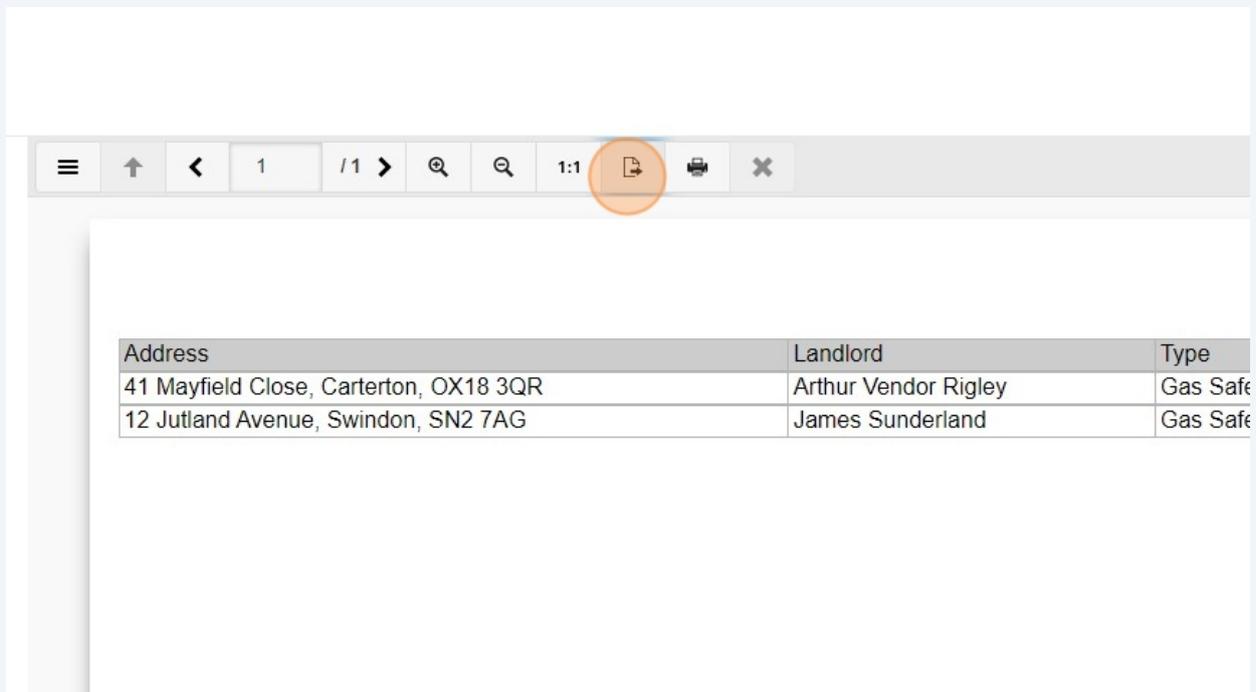
Your report will show on the screen. Click "Print" to print the document.

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

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

****This is the best way to manage a report created by CRM****



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