iam property

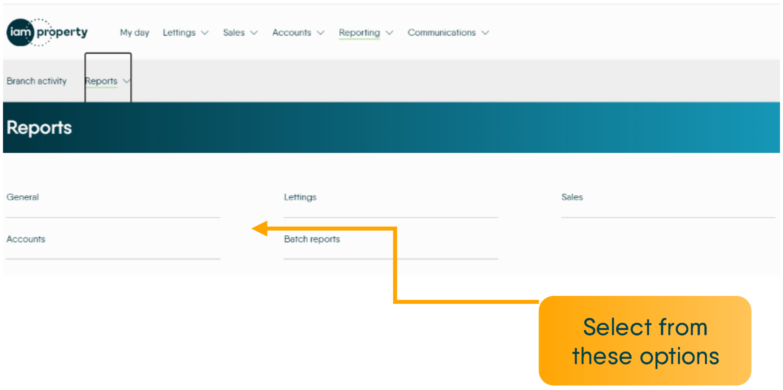
CRM HOW TO GUIDES

STANDARD REPORTS

iampropertyCRM Standard Reports

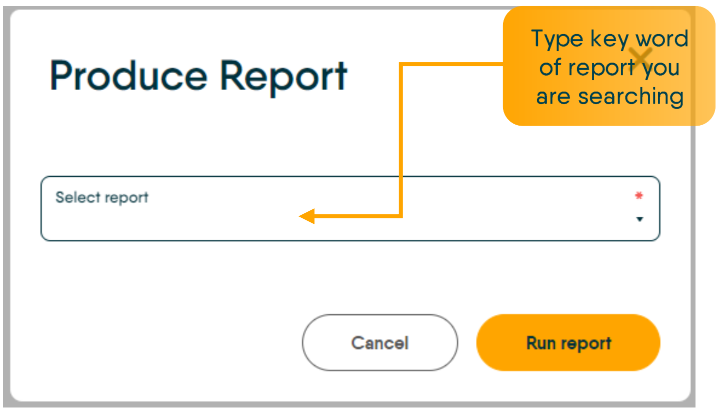
This guide will show how to run a standard report on iampropertyCRM and includes a brief description of the content of each.

For this overview we are using a Standard Property List report in iampropertyCRM.



To produce a Report, from the top menu, select ‘Reporting’.

Then select the appropriate option - General, Lettings, Sales, Accounts or Batch Reports.

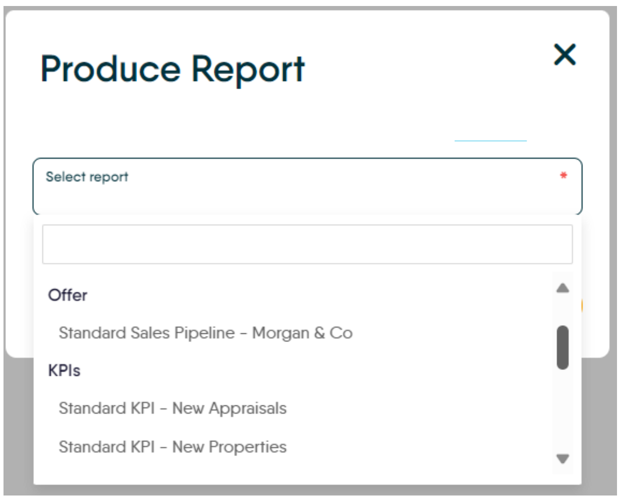


‘Produce Report’ screen

In the SELECT REPORT field, type a key word from the name of the report you are searching for e.g. KPI will show all the KPI Reports.

If you cannot find what you need, click on the drop-down to see the list of available reports.

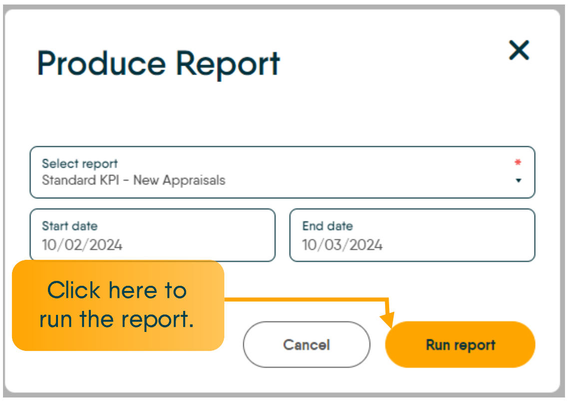
If none of the available reports meet your needs, speak with Support or your Onboarding Specialist to discuss bespoke reports.



Select the Report

From the list of reports, select the one that suits your needs.

Then click the ‘Run Report’ button.



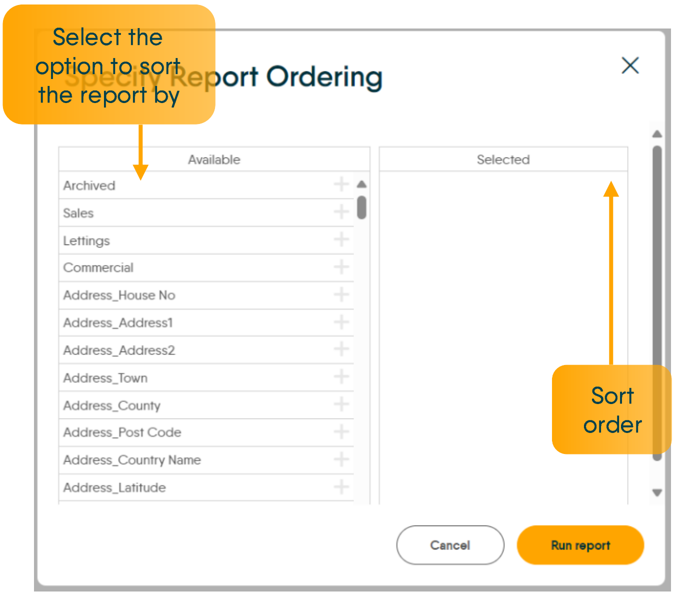
Produce Report

Depending on the Report chosen, e.g. New Appraisals, you may be required to add more information. This could be a requirement for start and end dates or it could be an option to select the data you wish to appear in the Report.

In the next step, you are able to select one or more fields from the Available list to sort by (If you are unfamiliar with the report, run the report and make a note of the fields which are included, Then click on the Produce Report button to go back to the previous step).

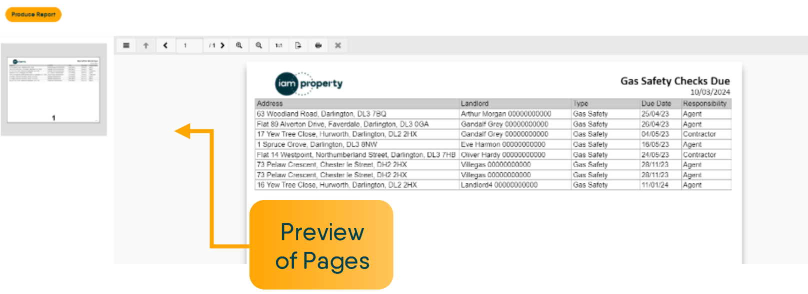
Click on the + to add the field to the Selected list and choose ASC (ascending) or DESC (descending). We would recommend limiting your selections, as adding too many may cause the report to generate incorrectly, our advice is select 1 key option. N.B. you can leave this screen blank and the report will produce.

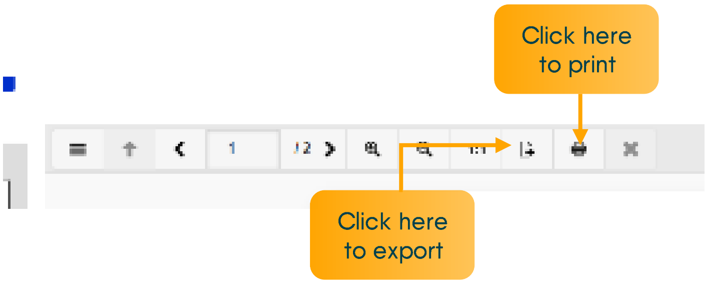
Click 'Run Report'.



KPI Report

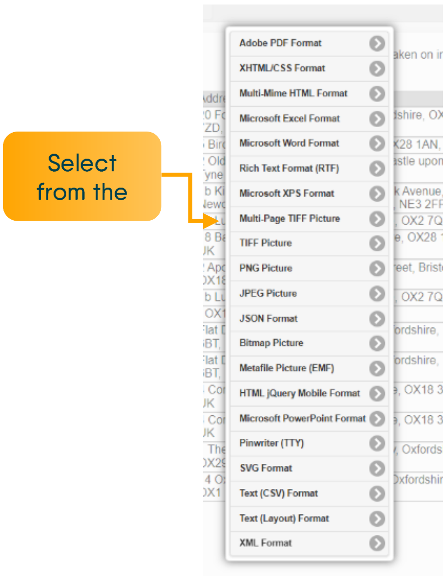
Once run, the report will look similar to this.





To Export the report to PDF/Word/Excel, etc. Click the Export Icon.

To print the file, click the printer icon (next to the export icon), check the print preview and printer settings, and print the document.



Exporting the File.

Select the required file format you want to save as, the file will then be saved in the downloads folder of your computer.

We recommend PDF if you are sharing the report as it is more secure than a Word document and Excel if further manipulation of data is required.

This is a detailed list of all the STANDARD reports available on iampropertyCRM, with a brief description of the content of each, and any options available before the report is run.

(L) = Lettings Report

(S) = Sales Report   e.g. Property list (L)

(A) = Accounts Report

If different report types are required please discuss this with your CRM Account Manager.

Reports

Property Reports-	
- Property List (L)	Property list with property address Landlord name, Asking Rent, Available from and Ref#.
- Property List (Managed) (L)	Managed Property list with property address, Landlord details and Landlord Address.
- Property List (Let Only) (L)	Let Only Property list with property address Landlord name and Landlord Address.
- Property List (Available) (L)	Available property, with Address, Summary details, Status, Available from (date), Bedroom, Bathroom, Price., Property Image 1.
- Property List (Vacant) (L)	Property Address, Landlord name, Asking Rent, Available from, Ref#
- Gas Safety Checks Due (L)	Gas safety checks, for a period of days (user defined). Address, Landlord Name and Contact Number, Type of check, Due Date, Responsibility.
- Compliance Checks Due (L)	As above, for ALL Compliance checks. Can sort by Compliance type.
Landlord Reports-	
- Landlord List (L)	Detailed (no address) Landlord list for all Landlords can include or exclude Archived Landlords.
- Landlord Source Breakdown (L)	Graphical view of all Where Landlords have been recommended from e.g. Friend, Recommendation etc.
Tenant Reports-	
- Tenant List (L)	Option to select property (Specific/All), option to show archived and prebooked. Shows property details (if HMO split by room), Landlord Name, Letting Status, Tenancy Status, Rent Amount.
- Tenant List (Managed) (L)	Option to select property (Specific/All), option to show archived and prebooked. Shows; Applicant details, no address or email.
- Tenant List (Let Only) (L)	Option to select property (Specific/All), option to show archived and prebooked. Shows; name, address, phone no., email, rent, rent period, next due date.

- Prebooked List (L)	Option to select property (Specific/All), option to show archived and prebooked. Shows; Property Letting Status, Prebooked Address, Rent Amount, Holding Deposit, Tenancy Start Date, Landlord Agreement name
- Rents Due In Next 30 Days (L)	Tenants name, Address, Rent Period, Amount, Rent Due Date, Email Address.
Applicant Reports-	
- Applicant List (L)	**Option**; show Archived. **Shows;** Date added, Reference, Negotiator, Status, Name, Email, Last Contacted, Contact notes.
- Applicant Source Breakdown (L)	**Options;** show Archived. **Shows;** graphical view of applicant source e.g. Recommendation, Advert, etc.
Tenancy Reports-	
- Notices Served (L)	**Options;** Number of days. **Shows;** Tenant Name, Address, MPN, Email, Notice Date, Vacating Date
- Tenancy Agreements Expiring (L)	**Options;** Number of days. **Shows;** Tenant Name, Address, MPN, Email, Tenancy End Date
Contractor Reports-	
- Contractor List (L)	**Options;** Show Archived (Y/N). **Shows;** Company Name, Contact Name, Contact Details, Public Liability Expire, Services.
Accounts Reports-	
- NRL6 (L)	**Options;** Landlord Name, Year Ending. **Shows;** HMRC Non-Resident Landlord Scheme NRL6 form completed.
- NRLQ (L)	**Options;** Year Ending. **Shows;** Quarterly return details for each Non-resident Landlord
- NRLY (L)	**Options;** Year Ending. **Shows;** Yearly return details for each Non-resident Landlord
- HMRC Agent Report (ROPL) (L)	**Options;** Start Date, End Date, Include Let Only, Include 0% Landlord, Overseas (All/Non-Oversea/Overseas) **Shows;** Landlord Name, Landlords Address (Detailed), Total Amount Due for the Year, Currency Code, Let Address, Postcode, Tax Year, Organisation Name (Agent Name), Source Ref.
- Agent Statement (L)	**Options;** Branch (required), Group By Expenditure Group, Start Date, End Date, Include Invoice Number, (Space to add invoice number)

	Shows; Date, Property, Collected, Net, Vat, Gross
- Agent Statement (Grouped) (L)	**Options;** Branch (required), Group By Expenditure Group, Start Date, End Date, Include Invoice Number, (Space to add invoice number) **Shows;** (Grouped by Invoice Type), Date, Property, Collected, Net, Vat, Gross
- Balances Report (L)	**Options;** Report Date **Shows;** Summary of Assets and Liabilities, Balances for all Ledgers.
- Transactions Audit – deleted (L)	**Shows; All deleted transactions**
- Transactions Analysis (Income and Expenditure Report) (L)	**Shows; Transaction Data for all Income and Expenditure**
- (Standard) Landlord Statement (L)	**Options;** Property, Landlord, Inc Rent Invoice, Exclude Payment to other LL, Start + End date, Inc invoice#. **Shows;** Date, Transaction, Description, Net, Vat, Amount (out), Amount (in) Current Balance, Float balance.
- Landlord Statement (Grouped) (L)	**Options;** Property, Landlord, Group Landlord Payments, Exclude payments to other LL, Start + End date, Inc Invoice # **Shows;** Income and Expenditure for Property Selected. Amounts paid to landlord. Al totals for Net, Vat, Gross.
- Consolidated Landlord Statement (L)	**Options;** Landlord, Exclude payments to other LL, Start and End Date, Invoice Number **Shows;** Date, Type (of transaction), Description, Debit, Credit, Current Balance, Float Balance. All per Property
- Consolidated Landlord Statement (Grouped by Transaction) (L)	**Options;** Landlord Name, Date Range **Shows;** Date, Address (property), Description of transaction, Net, VAT, Debit, Credit and Sub Total for each for Agent Fee Payment, Agent Refund, Float Transfer, LL Bank Receipt, LL Expense Payment, LL Fee Payment, Ledger Transfer, Rent Payment. (All per property)
- (Standard) Portfolio Statement (L)	**Options;** Select Portfolio, Select Landlord, Group Landlords Payment, Exclude payments to other LL, Start + End Date, Invoice# **Shows;** (income and Expenditure) Balance fwd, Due this period, Total Due, Received, Balance c/fwd
- Landlord Invoice (L)	**Options;** N/A **Shows;** Landlord details inc address. Details of transaction, VAT
- Landlord Receipt (L)	**Options;** N/A **Shows;** Transaction details
- Tenant Statement (L)	**Options;** Select Tenant, Start + End date, Include Invoice#, Invoice# **Shows;** Date, Transaction, Description, Amount Out, Amount In, Balance

- Tenant Invoice (L)	**Options;** N/A **Shows;** Tenant details. Transaction details
- Tenant Receipt (L)	**Options;** N/A **Shows;** Tenant details. Transaction details
- Contractor Statement (L)	**Options;** Select Contractor, Start + End date, Include Invoice#, Group Transactions **Shows;** Date, Type of transaction, Invoice #, Description, Amount Out, Amount In, Net, VAT
Standard KPI - Lettings	
- Standard KPI- New Applicants (L)	**Options;** Start + End date. **Shows;** Name, Address, Date Added, Source, Negotiator.
- Standard KPI- New Applicants (Grouped) (L)	**Options;** Start + End Date. **Shows;** Name, Address, Date Added, Source (grouped by)
- Standard KPI- Applicant/Tenant Breakdown (L)	**Options;** Start + End date. **Shows;** Applicant, Address, Tenant/Applicant, Date Added, Negotiator, Source.
- Standard KPI- Lettings Breakdown (L)	**Options;** Start + End date. **Shows;** Negotiator, New Applicants#, Lettings Agreed#, New Prebooked#, Lettings Appraisal booked#, Lettings Appraisal Lost#, Lettings Appraisal won#, New Instructions Property, New Opportunities Landlord#, Number of Lettings Valuation, Viewings Confirmation#, Viewings#
- Standard KPI- New Viewings (L)	**Options;** Start + End Date **Shows;** Applicant Name, Applicant Phone, Applicant Email, Property Address, Status (booked, etc.), Confirmed, Viewing Date, Viewing Time, Negotiator.
- Standard KPI- New Properties (L)	**Options;** Start + End Date **Shows;** Address, Landlord, Added, Reference, Negotiator
- Standard KPI- New Properties (Grouped) (L)	**Options;** Start + End Date **Shows;** (grouped by Property/Landlord), Address, Landlord, Added, Reference.
- Standard KPI- Tenancy Renewals (L)	**Options;** Start + End Date **Shows;** Tenant, Address, Renewal Date, Tel. No. Negotiator.
- Standard KPI- Tenancy Renewals (Grouped) (L)	**Options;** Start + End Date **Shows;** (grouped by Negotiator) Tenant, Address, Renewal Date, Tel No.
- Standard KPI- New Tenancies (Grouped) (L)	**Options;** Start + End Date **Shows;** (grouped by Negotiator), Name, Tenancy Start, Tenancy End Date, Property Address, Date Added.

Standard KPI - Sales	
- Standard KPI- New Appraisals (S)	**Options;** Start + End Date **Shows;** Property Address, Vendor Name, Mobile No., Email Address, Appraisal Date, Outcome Status, Price to, Price From, Negotiator.
- Standard KPI- New Applicants (S)	**Options;** Start + End Date **Shows;** Vendor Name, Address, Mobile No., Email Address, Date Added, Source, Negotiator.
- Standard KPI- New Applicants Grouped (S)	**Options;** Start + End Date **Shows;** (Grouped by Negotiator) Vendor Name, Address, Mobile No., Email Address, Date Added, Source.
- Standard KPI- New Viewings (S)	**Options;** N/A **Shows;** Applicant Name, Applicant Phone Number, Applicant Email, Property Address, Status, Confirmed, Viewing Date, Viewing Time, Negotiator.
- Standard KPI- Vendor Source Breakdown (S)	**Options;** Start + End Date **Shows;** Address, Vendor (Name), (Date) Added, Asking Price, Reference, Negotiator.
- Standard KPI- New Properties (S)	**Options;** Start + End Date **Shows;** Vendor Name, Address, Mobile No., Email Address, Date Added, Source, Negotiator.
- Standard KPI- New Properties Grouped (S)	**Options;** Start + End Date **Shows;** Address, Vendor (Name), (Date) Added, Asking Price, Reference.
- Standard KPI- New Sales Breakdown (S)	**Options;** Start + End Date **Shows;** (Grouped by Negotiator) Vendor Name, Address, Mobile No., Email Address, Date Added, Source, Negotiator.
- Standard KPI- New Vendors (S)	**Options;** Start + End Date **Shows;** Vendor, Address, Email, Mobile Phone Number, Negotiator, Source, Date Added.
- Standard KPI- New Vendors Grouped (S)	**Options;** Start + End Date **Shows;** (Grouped by Negotiator) Vendor, Address, Email, Mobile Phone Number, Negotiator, Source, Date Added.