

Using the Search Tool in CRM



This guide provides a step-by-step instructions to effectively use the search tool in the CRM system, ensuring you can quickly locate essential records.

It's an invaluable resource for anyone looking to maximise their efficiency within the CRM platform.

1 There are 2 places to access the search tool.

The screenshot shows the CRM dashboard interface. At the top, there is a navigation bar with the 'iam property' logo on the left and a menu with items: 'My day', 'Lettings', 'Sales', 'Accounts', 'Reporting', and 'Communications'. On the right side of the navigation bar, there are icons for a grid, a calendar, a notification bell, a search magnifying glass, and a user profile labeled 'My account'. Below the navigation bar, a large heading reads 'Welcome back, Training'. Underneath this heading, there are three buttons: '+ Add New Record' (in an orange box), 'View property management', and 'Visit help centre'. A search bar is located below these buttons, with the placeholder text 'Search all records' and a magnifying glass icon on the right. Below the search bar, there are two main sections: 'Today's events' and 'My tasks'. The 'Today's events' section has a table with columns 'Time' and 'Name', showing one event at 12:00 with the name 'Test test'. The 'My tasks' section has a table with columns 'Status', 'Name', 'Priority', 'Start date', and 'Due date', showing three tasks, all with a status of 'Not Started' and a priority of 'High'. The tasks are named 'test', 'Make Tea', and 'test'.

2 From the My Day screen and clicking into the "Search All Records" field. This option is only available when in the My Day screen.

Type your search into the box and click here.

Welcome back, Training

+ Add New Record

View property management

Visit help centre

Search all records

Today's events

Time	Name
12:00	Test test

My tasks

Status	Name	Priority	Start date	Due date
Not Started	<u>test</u>	High	13/May/2025	13/May/2025
Not Started	<u>Make Tea</u>	High	09/Jun/2025	09/Jun/2025
Not Started	<u>test</u>	High	19/Jun/2025	19/Jun/2025
Not Started	<u>goodfellows task</u>	High	01/Jul/2025	01/Jul/2025

property

my day Lettings Sales Accounts Reporting Communications

My account

Welcome back, Training

Add New Record

View property management

Visit help centre

Search all records

Today's events

Name
Test test

My tasks

Status	Name	Priority	Start date	Due date
Not Started	<u>test</u>	High	13/May/2025	13/May/2025
Not Started	<u>Make Tea</u>	High	09/Jun/2025	09/Jun/2025
Not Started	<u>test</u>	High	19/Jun/2025	19/Jun/2025
Not Started	<u>goodfellows task</u>	High	01/Jul/2025	01/Jul/2025

3

or click the magnifying glass icon "Search". This option is always available to you when in CRM.

Click the "Type your search and press enter..." field.

I come back, Training

[Add New Record](#) [View property management](#) [Visit help centre](#)

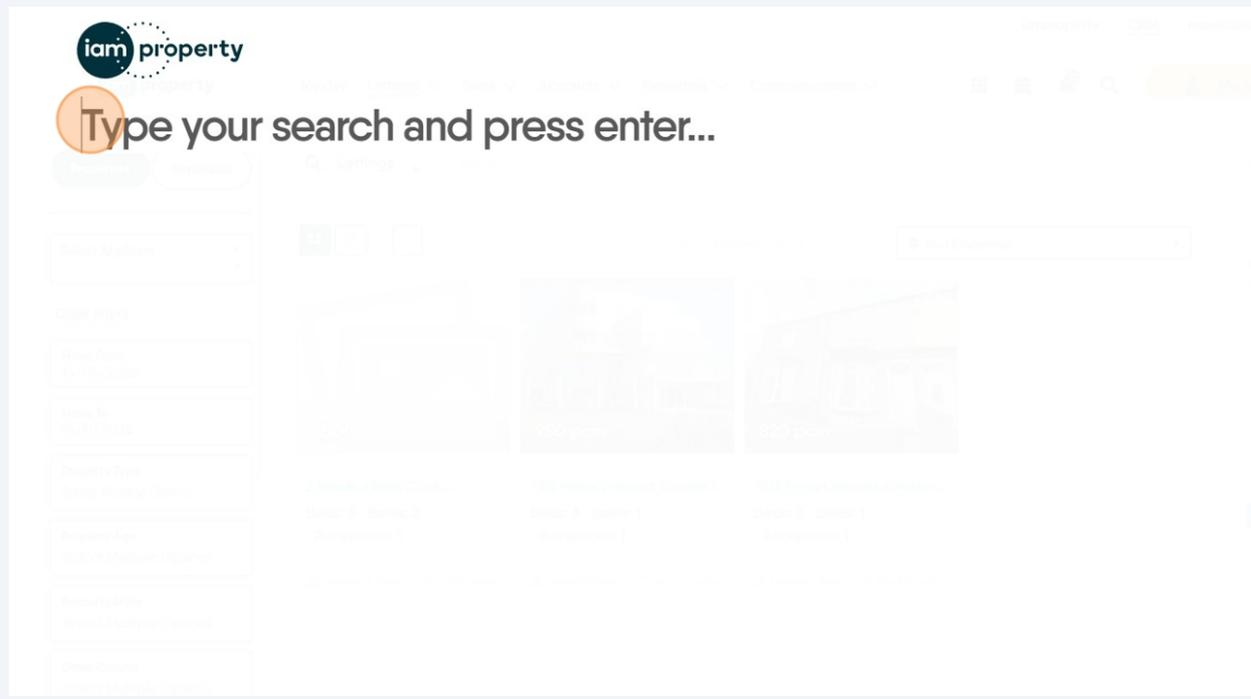
Records

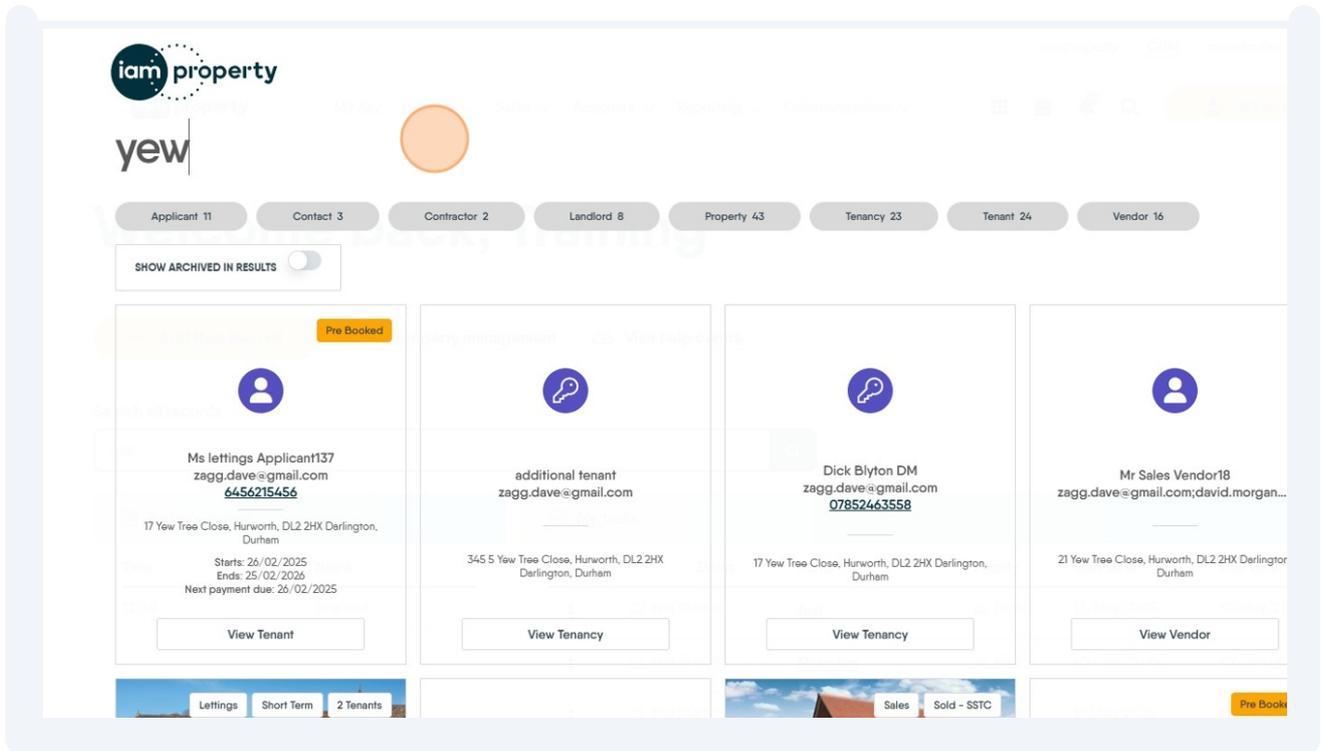
My events

Name
Test test

My tasks

Status	Name	Priority	Start date	Due date
Not Started	test	High	13/May/2025	13/May/2025
Not Started	Make Tea	High	09/Jun/2025	09/Jun/2025
Not Started	test	High	19/Jun/2025	19/Jun/2025



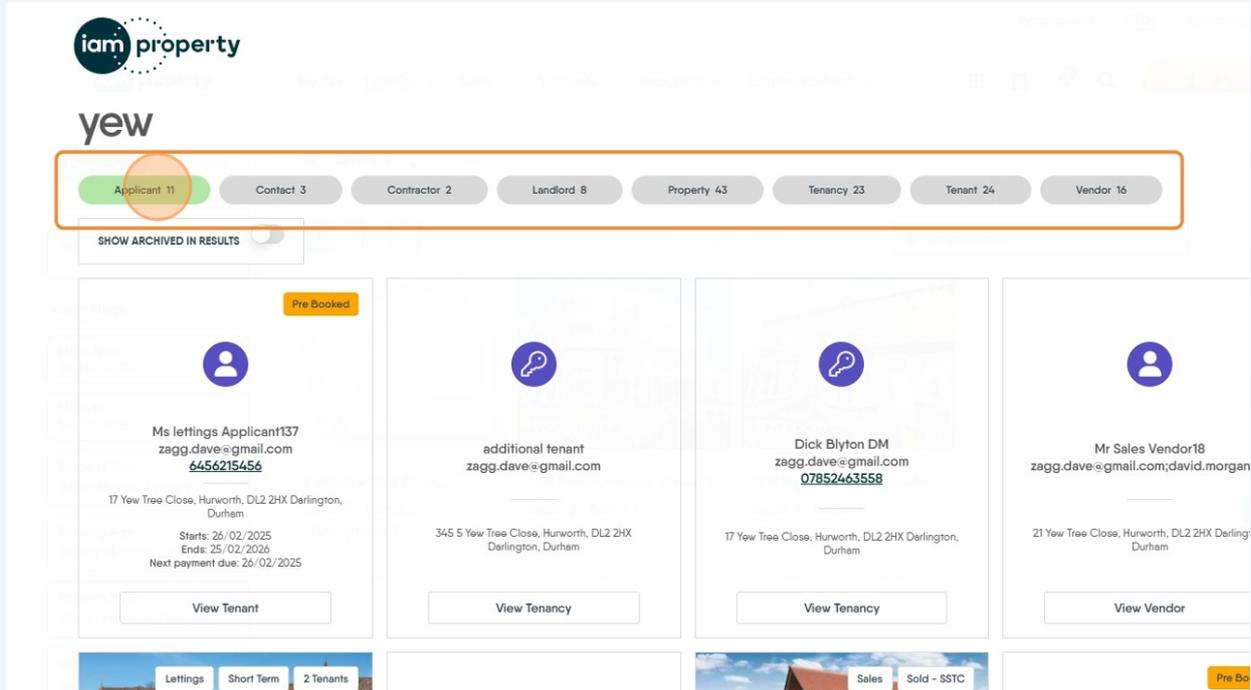


Tip! The search terms are a minimum of 3 characters, however, they can be anything e.g. Phone Number (or part of), postcode (or part of), street name etc.

Managing the Results

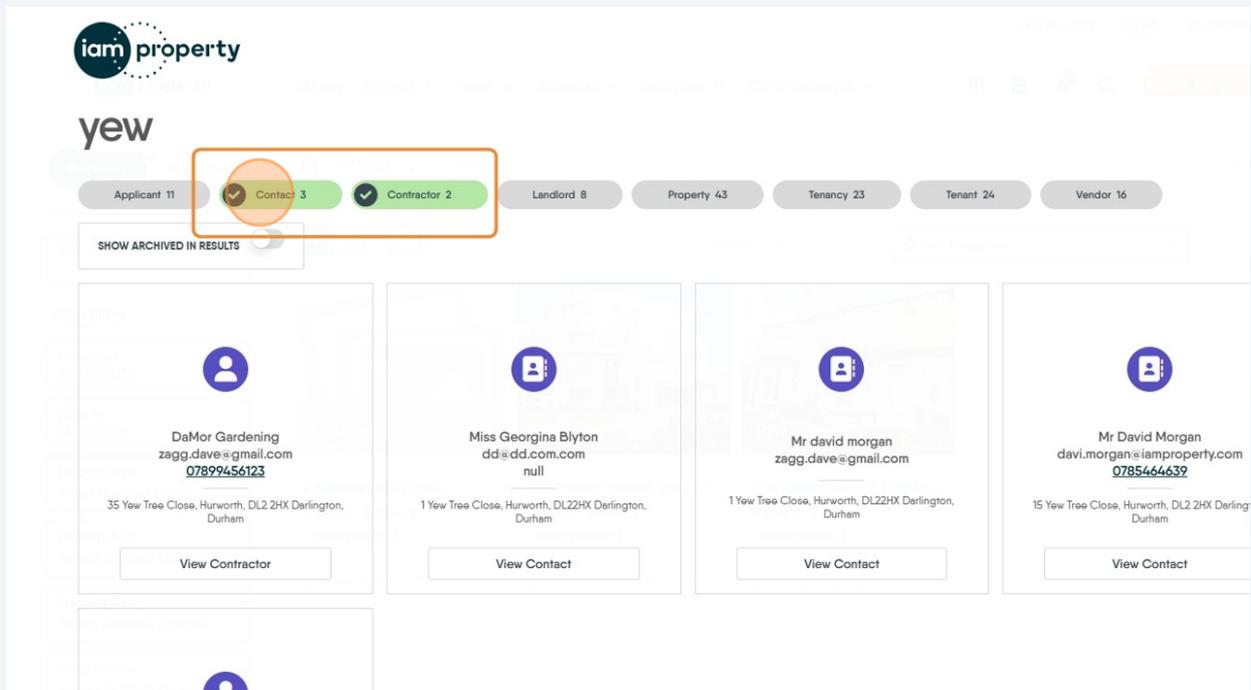
4

The icons at the top of the screen will filter the records to only show what is detailed on the icon e.g. Applicants. The number relates to the amount of records e.g. 11

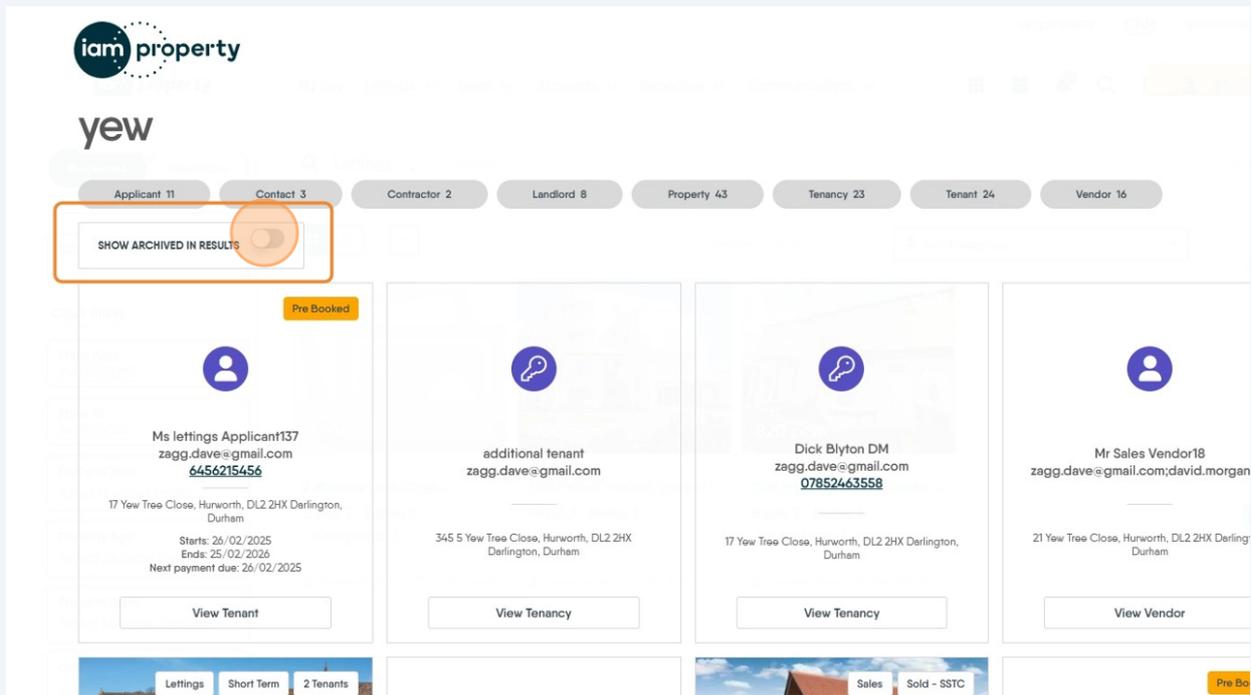


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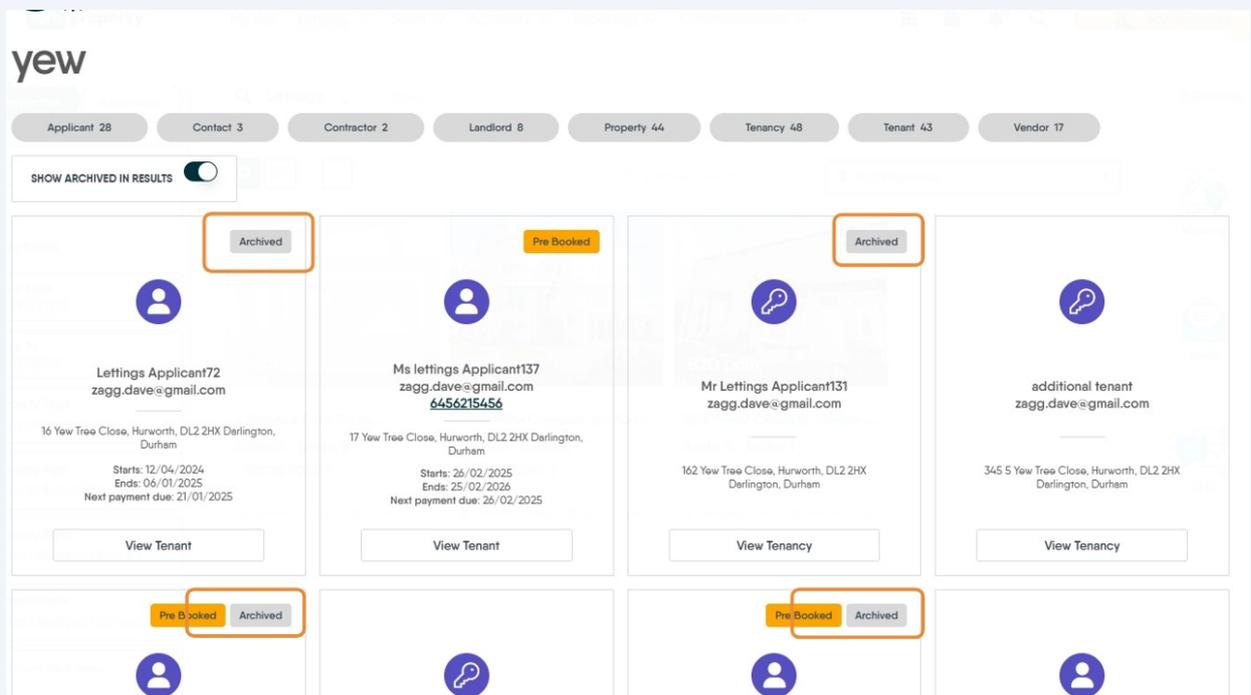
Multiples of these icons can be selected to filter the view to only show what you require. e.g Contacts and Contractors



6 Click here to show all the Archived content



7 Archived content will show with "Archived" in the top right corner.



8

To view a specific record, click the 'View...' button e.g. Click "View Vendor"

The screenshot shows a dashboard with a top navigation bar containing filters for 'Contract 3', 'Contractor 2', 'Landlord 8', 'Property 43', 'Tenancy 23', 'Tenant 24', and 'Vendor 16'. Below the filters, there is a search bar and a 'ARCHIVED IN RESULTS' toggle. The main content area is a grid of record cards. The top row contains four cards: 'Ms lettings Applicant137', 'additional tenant', 'Dick Blyton DM', and 'Mr Sales Vendor18'. The 'Mr Sales Vendor18' card has an orange circle around its 'View Vendor' button. The bottom row contains four cards: '21 Tree Close, Hurworth, DL2 2HX Darlington, Durham', 'bloggs', '2 Yew Tree Close, Hurworth, DL2 2HX Darlington, Durham', and 'Applicant141'. The 'Applicant141' card has a 'Pre Booked' tag.



Tip! If you press and hold the ctrl key on (bottom left or bottom) of your keyboard this will open the record in a new screen. This means you do not lose the page you are currently working on, allowing easy multi tasking.

9 Click here to close the screen.

The screenshot shows a web application interface for property management. At the top left, the logo 'property' is visible. Below it, there are navigation tabs for 'Contact 11', 'Contact 3', 'Contractor 2', 'Landlord 8', 'Property 43', 'Tenancy 23', 'Tenant 24', and 'Vendor 16'. A search bar is located on the right side of the top navigation. Below the navigation, there is a section titled 'ARCHIVED IN RESULTS' with a toggle switch. The main content area displays a grid of four record cards. Each card has a blue circular icon with a white symbol (a person or a key) and contains text identifying the record type, contact information, and address. The first card is for a 'Ms lettings Applicant' with a 'Pre Booked' status. The second is for an 'additional tenant'. The third is for a 'Dick Blyton DM' with a 'Pre Booked' status. The fourth is for a 'Mr Sales Vendor'. At the bottom of the grid, there are tabs for 'Lettings', 'Short Term', and '2 Tenants' on the left, and 'Sales', 'Sold - STC', and another 'Pre Booked' status on the right. An orange circle with a white 'X' is positioned in the top right corner of the screenshot, indicating a close button.