

Using the Lettings Reporting Dashboard



This guide provides essential instructions for effectively utilising the Lettings Reporting Dashboard, enabling users to access and analyse key data for their branches.

It covers how to filter reports by date range and branch, ensuring tailored insights into sales and lettings performance. By following this guide, users can enhance their understanding of property management metrics, streamline reporting processes, and make informed decisions based on comprehensive data analysis.

1

Please note you will need to have access to the Reporting Dashboard Module before being able to use this guide.

Details on how to do this are available <https://scribeshow.com/shared/How to add the Reporting Dashboard module to Branches and Users tYLio soTjGQWh UreatVAg?referrer=workspace>

2

Navigate to <https://crm.iamproperty.com/MyDay>

The screenshot displays the 'MyDay' dashboard in the iam property CRM. The top navigation bar includes links for 'My day', 'Lettings', 'Sales', 'Accounts', 'Reporting', and 'Communications', along with a search icon and a 'My account' button. The main heading is 'Welcome back, Training'. Below this, there are three action buttons: '+ Add New Record', 'View property management', and 'Visit help centre'. A search bar labeled 'Search all records' is present. The dashboard is divided into two main sections: 'Today's events' and 'My tasks'. The 'Today's events' section shows a single event at 12:00 named 'Test test'. The 'My tasks' section shows a list of tasks with columns for Status, Name, Priority, Start date, and Due date.

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
Not Started	goodfellows task	High	01/Jul/2025	01/Jul/2025

3 Click "Reporting"

PLEASE NOTE: new records may take upto 24hrs to appear in Global Search. Please continue to use dashboard search for new records in the meantime.

iam 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

Time	Name
12:00	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

4 Click "Reporting Dashboard"

PLEASE NOTE: new records may take upto 24hrs to appear in Global Search. Please continue to use dashboard search for new records in the meantime.

iam property My day Lettings Sales Accounts **Reporting** Communications My account

Reporting Dashboard Branch activity Reports

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	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



There are 2 tabs of reporting available:

Sales Reporting - Steps 5 to 14 - This will show you historic reporting for a selected date range.

Sales Pipeline - Steps 15 to 28 - This will show you any upcoming reporting.

5

Click "Lettings Reporting"

PLEASE NOTE: new records may take upto 24hrs to appear in Global Search. Please continue to use dashboard search for new records in the meantime.

iam property

My day Lettings Sales Accounts Reporting Communications

Reporting

Sales Reporting Sales Pipeline **Lettings Reporting** Lettings Pipeline

Chart type: bar

Applied filters: Date range: 01 Aug 2025 - 21 Aug 2025 Branch: Morgan & Co (default)

Appraisals

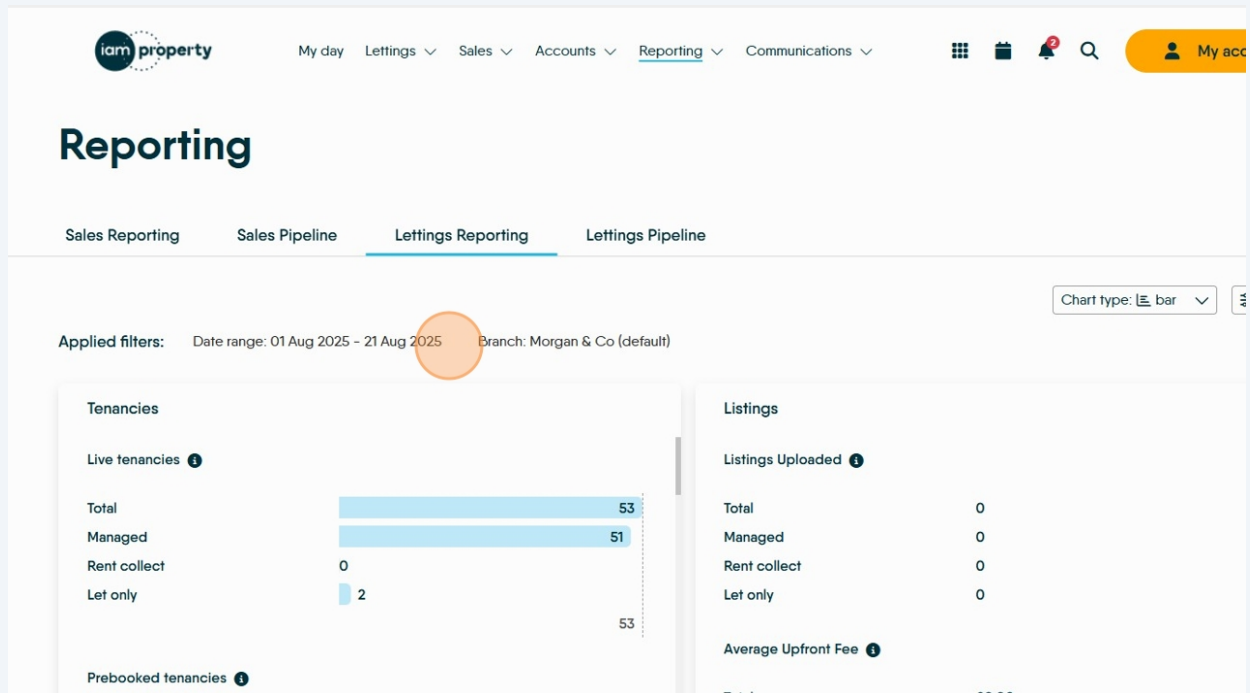
Appraisals	
Total	1
Booked	0
Outcome Pending	0
Won	1
Lost	0

Listings

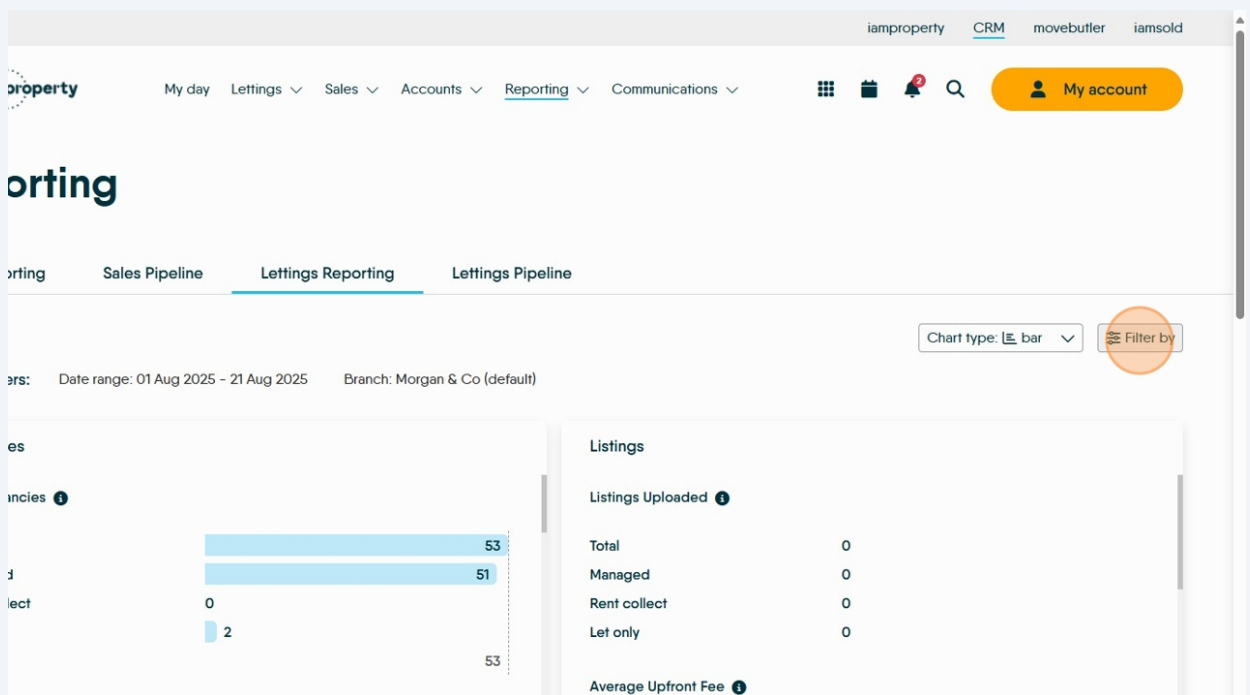
Instructions	
Uploaded	
Instructions uploaded	
Total Fees	

6 When you click into Reporting Dashboard, you will first see Lettings Reporting.

By default, you will see figures from the current calendar month, and your user's branch.



7 To view more branches, or a different date range, click "Filter By"



8

To change the date range, you can select one of the standard filters (*Month to Date, Previous 30 Days, Previous Month, This Year*) or select your own custom date range.

Filter by

Date range

Start date: 01/08/2025 End date: 21/08/2025

Month to date Previous 30 days Previous month This year (Jan - Today)

Branches

Select all Deselect all

☒ Morgan & Co (default)
☐ Morgan&Co MB
☐ Reports & Letters

Apply filters

9

You can also select which branches you would like to view. Click "Apply filters" when you have selected your preferences. Click "Apply filters"

Filter by

Date range

Start date: 01/08/2025 End date: 21/08/2025

Month to date Previous 30 days Previous month This year (Jan - Today)

Branches

Select all Deselect all

☒ Morgan & Co (default)
☐ Morgan&Co MB
☐ Reports & Letters

Apply filters

Reporting

Sales Reporting
Sales Pipeline

Applied filters: Date range: 01 Aug 2025 - 21 Aug 2025

Tenancies

Live tenancies ⓘ

Total	
Managed	
Rent collect	0
Let only	2

Prebooked tenancies ⓘ

Total	90
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Stock

Filter by ✕

Date range

Start date: 01/08/2025 End date: 21/08/2025

Month to date Previous 30 days Previous month This year (Jan - Today)

Branches

Select all Deselect all

☒ Morgan & Co (default)

☒ Morgan&Co MB

☐ Reports & Letters

Apply filters

Chart type: bar Filter by

Total £0.00

Managed £0.00

Appraisals

10

You will see your new filters detailed at the top of the page. Click 'Reset Filters' to remove the newly created filters and return to the original configuration.

Reporting

Sales Reporting
Sales Pipeline
Lettings Reporting
Lettings Pipeline

Chart type: bar

Applied filters: Date range: 01 Aug 2025 - 21 Aug 2025 Branch: Morgan & Co (default) ✕ Branch: Morgan&Co MB ✕ **Reset filters**

Tenancies

Live tenancies ⓘ

Total	53
Managed	51
Rent collect	0
Let only	2

Prebooked tenancies ⓘ

Total	90
-------	----

Stock

Listings

Listings Uploaded ⓘ

Total	0
Managed	0
Rent collect	0
Let only	0

Average Upfront Fee ⓘ

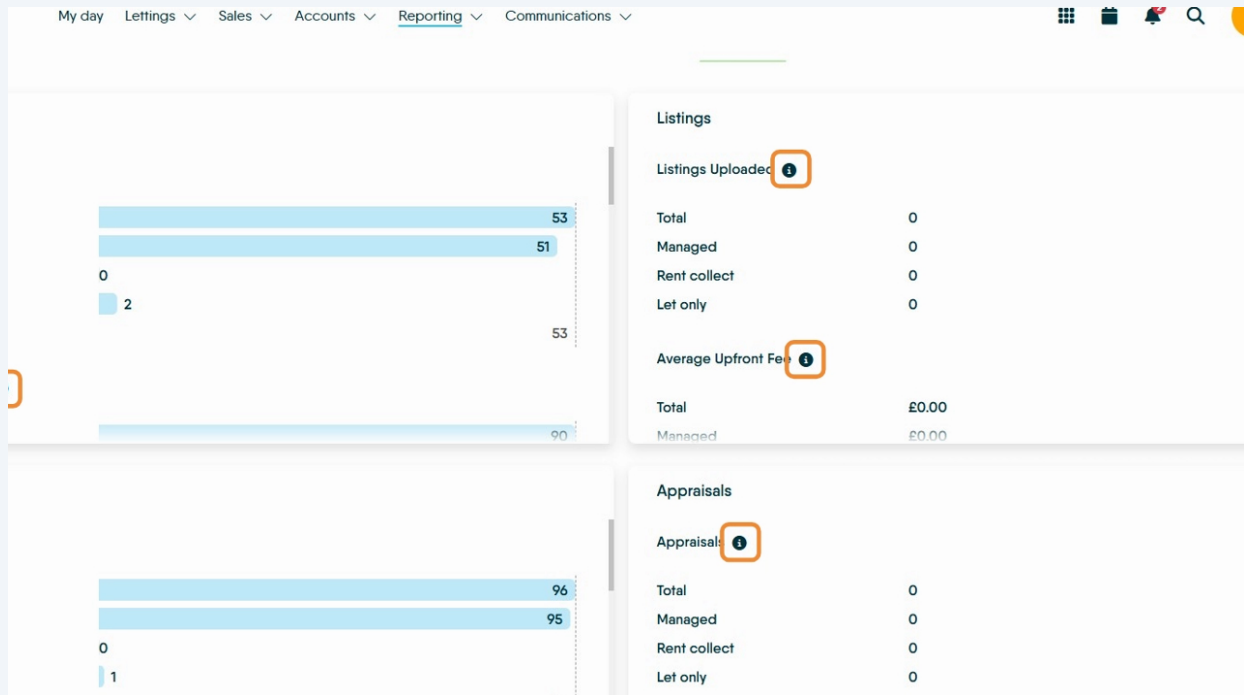
Total	£0.00
Managed	£0.00

Appraisals

11

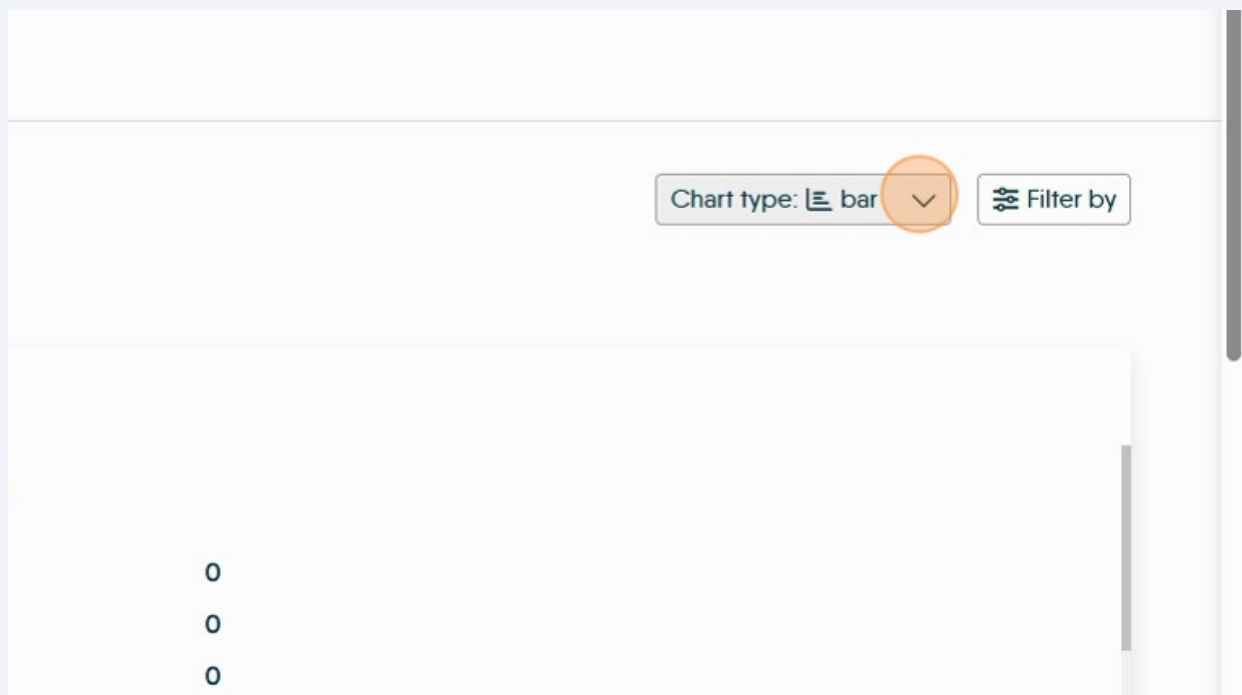
You will now be able to view the combined figures for all your selected branches within your selected date range.

If you are unsure of what any field shows, click the 'i' icon (highlighted) against the category title for more information.

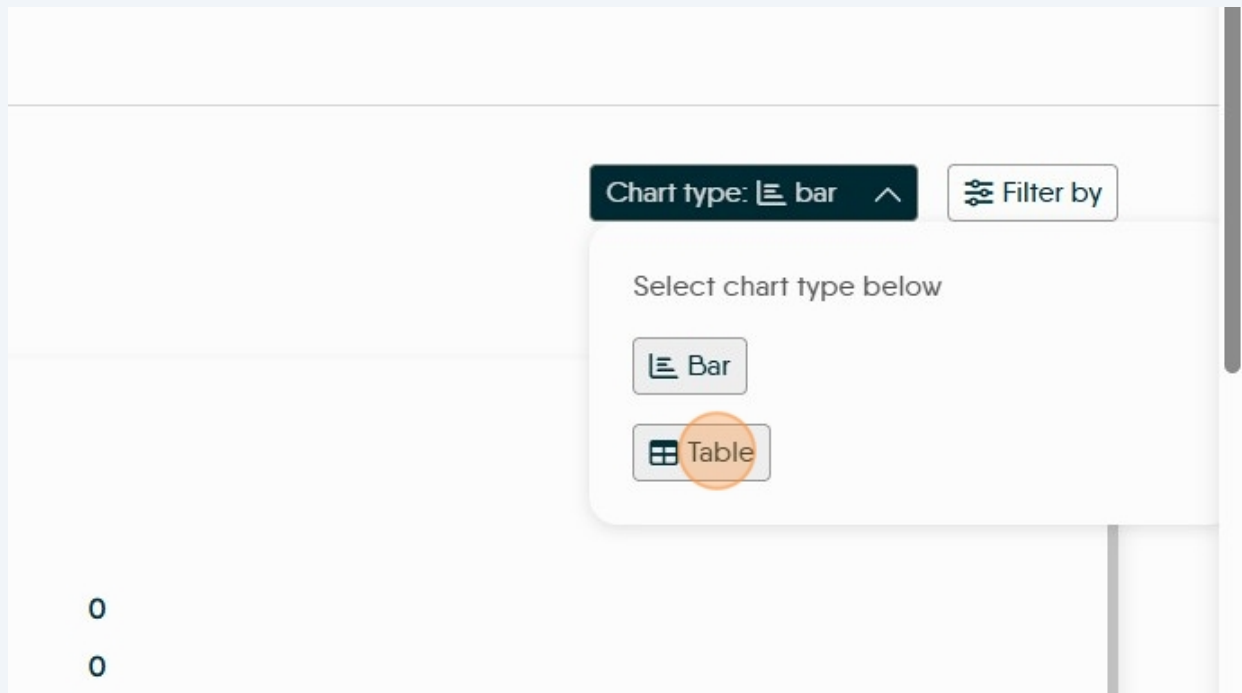


12

To view your selected branches separately, click "Chart Type"



13 Click "Table"



14 You will now see your reporting broken down by branch, in a table view.

A screenshot of the iamproperty CRM reporting dashboard. The dashboard shows three tables: Maintenance, Viewings, and Portal enquiries. Each table is broken down by branch (Morgan & Co and Morgan&Co MB) and includes columns for Total, Managed, Rent Collect, and Let Only. The Portal enquiries table also includes columns for Rightmove Portal Enquiries, Zoopla Portal Enquiries, and On The Market Portal Enquiries.

Branch	Total	Managed	Rent Collect	Let Only
Morgan & Co	40	40	0	0
Morgan&Co MB	0	0	0	0

Branch	Total	Managed	Rent Collect	Let Only
Morgan & Co	1	1	0	0

Branch	Rightmove Portal Enquiries	Zoopla Portal Enquiries	On The Market Portal Enquiries
Morgan & Co	0	0	0
Morgan&Co MB	0	0	0

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CRM
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iamsold

iamproperty
My day
Lettings
Sales
Accounts
Reporting
Communications

Grid
Calendar
Notifications
Search
My account

Portal enquires

Branch	Rightmove Portal Enquiries	Zoopla Portal Enquiries	On The Market Portal Enquiries
Morgan & Co	0	0	0
Morgan&Co MB	0	0	0

Tenancies
Live

Branch	Total	Managed	Rent Collect	Let Only
Morgan & Co	53	51	0	2
Morgan&Co MB	0	0	0	0

Stock
Total Properties

Branch	Total	Managed	Rent Collect	Let Only
Morgan & Co	95	94	0	1
Morgan&Co MB	1	1	0	0

New Landlords

Branch	Total
Morgan & Co	0
Morgan&Co MB	0

Offers

Offers Received

Branch	Total	Managed	Rent Collect	Let Only
Morgan & Co	0	0	0	0

Lettings Pipeline

15 Click "Lettings Pipeline"

Reporting

Sales Reporting Sales Pipeline **Lettings Reporting** **Lettings Pipeline**

Applied filters: Date range: 01 Aug 2025 - 21 Aug 2025 Branch: Morgan & Co (default) X Branch: Morgan&Co MB X [Reset filters](#)

Maintenance

Branch	Total	Managed	Rent Collect
Morgan & Co	40	40	0
Morgan&Co MB	0	0	0

16 By default, you will see only your user's branch.

Reporting

Reporting Sales Pipeline Lettings Reporting **Lettings Pipeline**

Applied filters: Date range: 21 Aug 2025 - 20 Sept 2025 X **Branch: Morgan & Co (default)** X [Reset filters](#)

Properties

Properties Starting ⓘ

Managed	0
Let only	0

Properties Renewing ⓘ

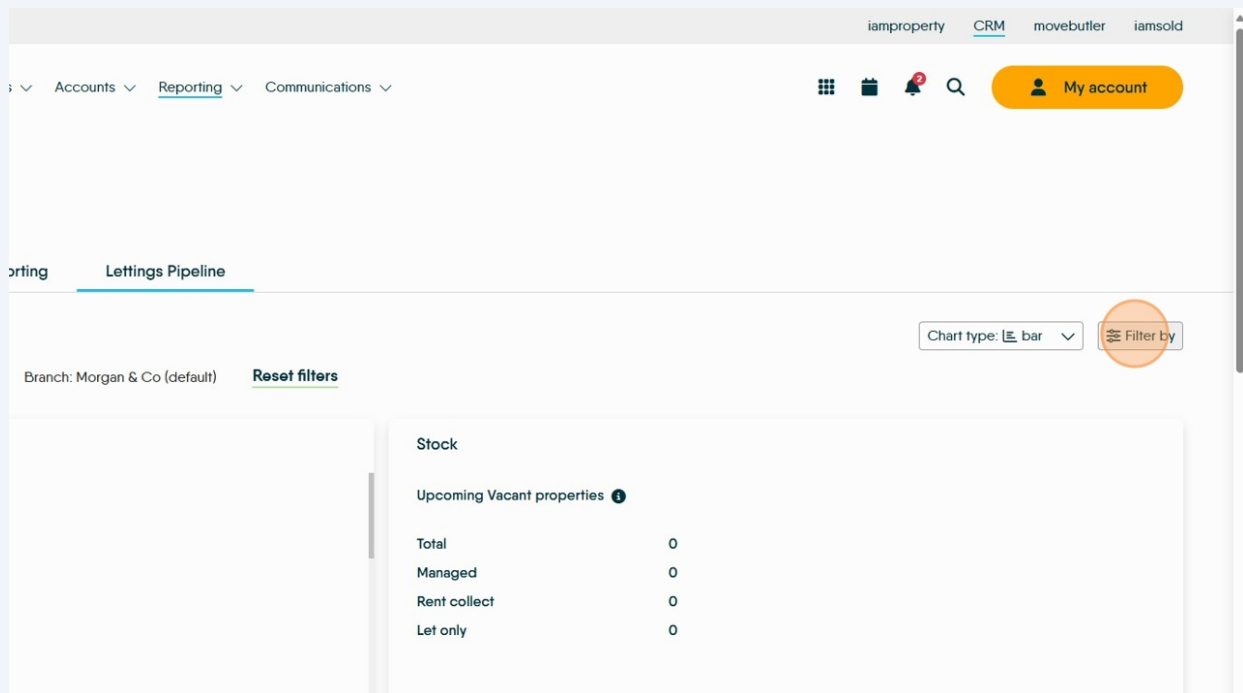
Stock

Upcoming Vacant properties ⓘ

Total	0
Managed	0
Rent collect	0
Let only	0

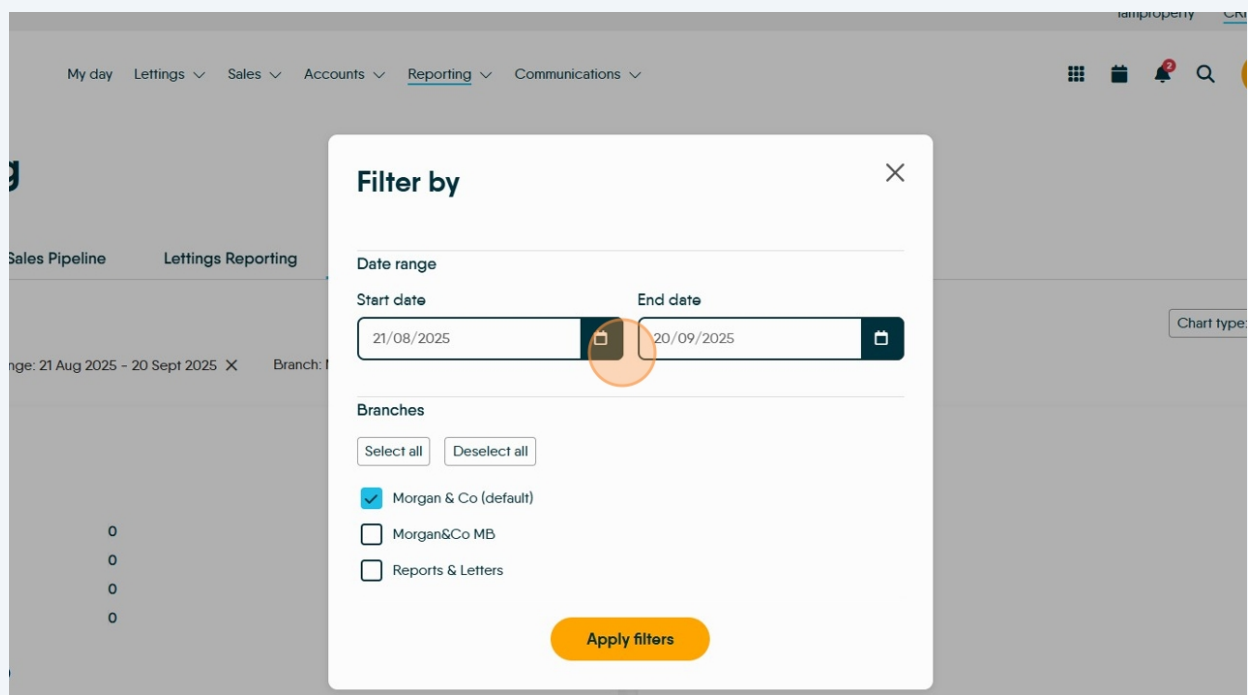
17

To view more branches, click "Filter By" then select which branches you would like to view.
Click "Apply Filters"



18

Click "Start date, End date"



19 Click the branches you want to select.

The screenshot shows a 'Filter by' dialog box with a close button (X) in the top right corner. The 'Date range' section has 'Start date' set to 21/08/2025 and 'End date' set to 20/09/2025. The 'Branches' section has 'Select all' and 'Deselect all' buttons. Below these are three checkboxes: 'Morgan & Co (default)' (checked), 'Morgan&Co MB' (highlighted with an orange circle), and 'Reports & Letters' (unchecked). An orange 'Apply filters' button is at the bottom.

20 Click "Apply filters"

This screenshot shows the same 'Filter by' dialog box as in step 19. In this step, the 'Morgan & Co (default)' and 'Morgan&Co MB' checkboxes are both checked. The 'Apply filters' button at the bottom is highlighted with an orange circle, indicating it should be clicked.

21 The date range and branch filters will show.

The screenshot shows the 'Reporting' section of the 'iam property' system. The 'Lettings Pipeline' tab is selected. A filter bar at the top displays 'Applied filters: Date range: 21 Aug 2025 - 20 Sept 2025 X Branch: Morgan & Co (default) X Branch: Morgan&Co MB X' with a 'Reset filters' link. Below the filters are two summary cards: 'Tenancies' and 'Stock'. The 'Tenancies' card shows 'Tenancies Starting' and 'Tenancies Renewing' with sub-totals for Total, Managed, Rent collect, and Let only, all showing 0. The 'Stock' card shows 'Upcoming Vacant properties' with the same sub-totals, also showing 0.

Tenancies	
Tenancies Starting ⓘ	
Total	0
Managed	0
Rent collect	0
Let only	0
Tenancies Renewing ⓘ	
Total	0
Managed	0

Stock	
Upcoming Vacant properties ⓘ	
Total	0
Managed	0
Rent collect	0
Let only	0

22 You will now see your reporting broken down by branch, in a table view.

This screenshot shows the same 'Reporting' dashboard but with a 'Table view' selected. The filter bar remains the same. Below the summary cards, there are sections for 'Appraisals' and 'Viewings', which are currently empty. The 'Tenancies' and 'Stock' cards are still visible at the top.

Tenancies	
Tenancies Starting ⓘ	
Total	0
Managed	0
Rent collect	0
Let only	0
Tenancies Renewing ⓘ	
Total	0
Managed	0

Stock	
Upcoming Vacant properties ⓘ	
Total	0
Managed	0
Rent collect	0
Let only	0

Appraisals

Viewings

Tenancies

Tenancies Starting 1

Total	0
Managed	0
Rent collect	0
Let only	0

Tenancies Renewing 1

Total	0
Managed	0

Appraisals

Upcoming Appraisals 1

Total	0
Managed	0
Rent collect	0
Let only	0

Unconfirmed Appraisals 1

Stock

Upcoming Vacant properties 1

Total	0
Managed	0
Rent collect	0
Let only	0

Viewings

Viewings Due 1

Total	0
Managed	0
Rent collect	0
Let only	0

Viewings Unconfirmed 1

Tenancies

Tenancies Starting 1

Total	0
Managed	0
Rent collect	0
Let only	0

Tenancies Renewing 1

Total	0
Managed	0

Appraisals

Upcoming Appraisals 1

Total	0
Managed	0
Rent collect	0
Let only	0

Unconfirmed Appraisals 1

Stock

Upcoming Vacant properties 1

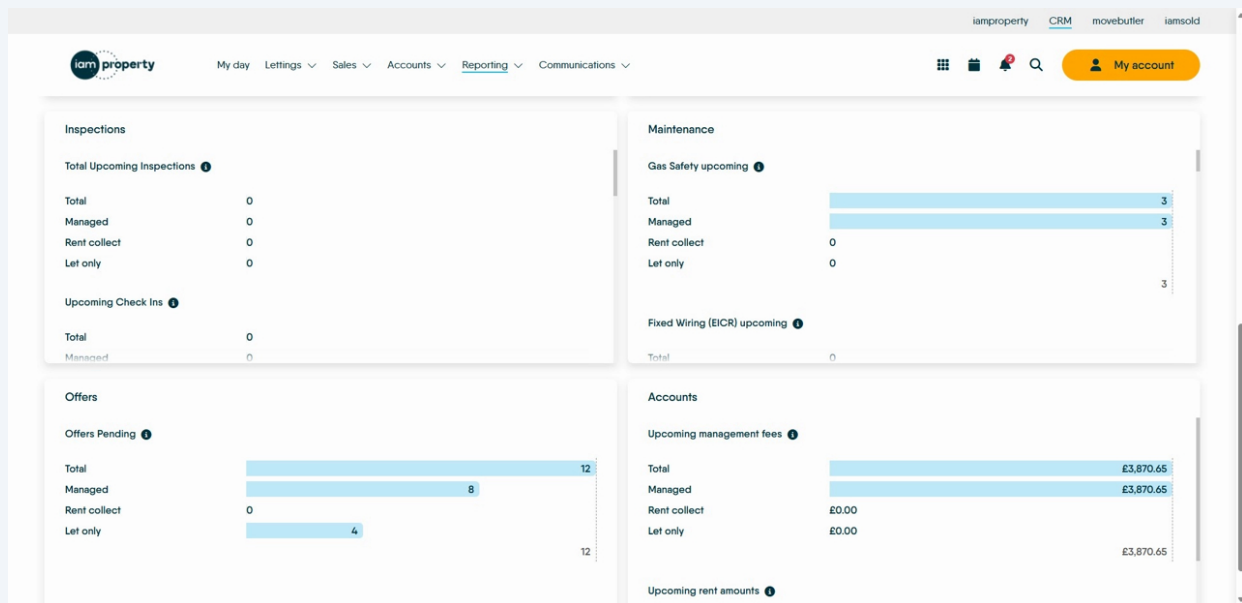
Total	0
Managed	0
Rent collect	0
Let only	0

Viewings

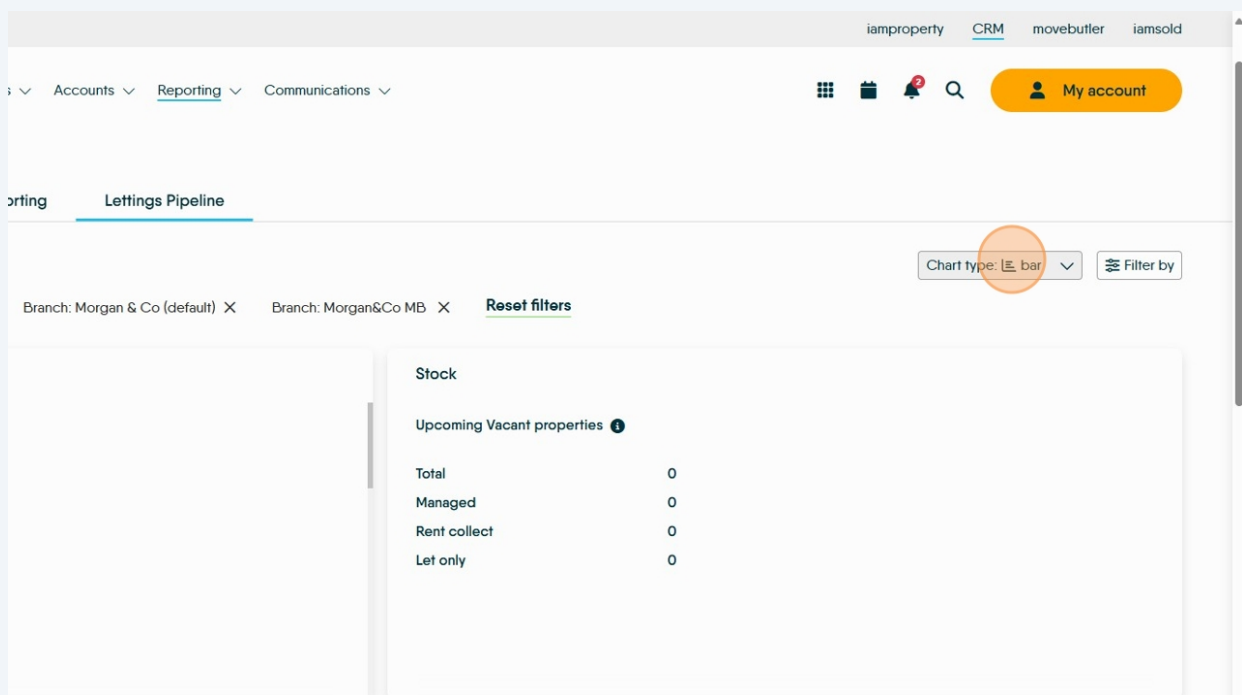
Viewings Due 1

Total	0
Managed	0
Rent collect	0
Let only	0

Viewings Unconfirmed 1



23 To view individual branch details click "Chart Type"



24 Click "Table"

The screenshot shows the 'Lettings Pipeline' reporting interface. At the top, there are navigation links for 'Accounts', 'Reporting', and 'Communications'. A user profile button labeled 'My account' is in the top right. Below the navigation, the 'Lettings Pipeline' tab is selected. The interface displays two filters: 'Branch: Morgan & Co (default)' and 'Branch: Morgan&Co MB'. A 'Reset filters' link is also present. On the right, a 'Chart type' dropdown menu is open, showing 'Bar' as the selected option and 'Table' as an alternative option, which is highlighted with an orange circle. The main content area shows a 'Stock' section with 'Upcoming Vacant properties' and a table with columns 'Total', 'Managed', 'Rent collect', and 'Let only', all showing a value of 0.

Chart type: **Bar** Filter by

Select chart type below

Bar

Table

Branch: Morgan & Co (default) X Branch: Morgan&Co MB X [Reset filters](#)

Stock

Upcoming Vacant properties ⓘ

Total	0
Managed	0
Rent collect	0
Let only	0

25 This will show the reporting individually by the branches selected.

The screenshot shows the 'Lettings Pipeline' reporting interface with the 'Table' view selected. The 'Applied filters' section shows 'Date range: 21 Aug 2025 - 20 Sept 2025', 'Branch: Morgan & Co (default)', and 'Branch: Morgan&Co MB'. The 'Maintenance' table displays data for two branches: 'Morgan & Co' and 'Morgan&Co MB'. The table has columns for 'Branch', 'Total', 'Managed', and 'Rent Coll'. The 'Morgan & Co' row shows 3 for Total and Managed, and 0 for Rent Coll. The 'Morgan&Co MB' row shows 0 for Total and Managed, and 0 for Rent Coll. The 'Branch' column is highlighted with an orange box. Below the table, there is a 'Viewings' section.

Sales Reporting Sales Pipeline Lettings Reporting **Lettings Pipeline**

Applied filters: Date range: 21 Aug 2025 - 20 Sept 2025 X Branch: Morgan & Co (default) X Branch: Morgan&Co MB X [Reset filters](#)

Maintenance

Branch	Total	Managed	Rent Coll
Morgan & Co	3	3	0
Morgan&Co MB	0	0	0

Viewings

26

In the 'Maintenance' screen, clicking on the drop down menu to the right side shows a menu of all the Compliance types to view upcoming records.

The screenshot shows the 'Maintenance' screen in the 'Lettings Pipeline' section. The 'Maintenance' dropdown menu is highlighted, showing a list of compliance types to view upcoming records.

Branch	Total	Managed	Rent Collect	Let Only
Morgan & Co	3	3	0	0
Morgan&Co MB	0	0	0	0

The dropdown menu shows the following compliance types:

- Gas Safety Upcoming
- Fixed Wiring Upcoming
- Appliances Upcoming
- Oil Service Upcoming
- Smoke Alarms Upcoming
- Fire Extinguishers Upcoming
- Fire Retardance Upcoming
- Carbon Monoxide Upcoming
- Legionella Upcoming
- Emergency Lighting Upcoming
- Fire Alarm Upcoming
- Prescribed Information Upcoming
- Heat Detector Upcoming
- EPC Upcoming

27

The screens in the Pipeline section show the information for each selected branch in Maintenance, Viewings, Tenancies, Stock, Offers, Appraisals, Accounts.

28

The Accounts screens show Upcoming Management Fees and Upcoming Rent Amounts for each property management type.

iamproperty CRM movebutler iams

iamproperty My day Lettings Sales Accounts Reporting Communications

My account

Accounts

Upcoming management fees

Branch	Total	Managed	Rent Collect	Let Only
Morgan & Co	£3,870.65	£3,870.65	£0.00	£0.00
Morgan&Co MB	£0.00	£0.00	£0.00	£0.00

Upcoming rent amounts

Branch	Total	Managed	Rent Collect	Let Only
Morgan & Co	£73,592.00	£71,292.00	£0.00	£2,300.00
Morgan&Co MB	£0.00	£0.00	£0.00	£0.00