

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://scribehow.com/shared/How to add the Reporting Dashboard module to Branches and Users>

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

The screenshot shows the 'My Day' dashboard of the iam property CRM. At the top, there is a navigation bar with links: My day, Lettings, Sales, Accounts, Reporting (which is underlined in blue), Communications, and a search bar. To the right of the search bar are icons for notifications and a user profile, with a yellow 'My account' button.

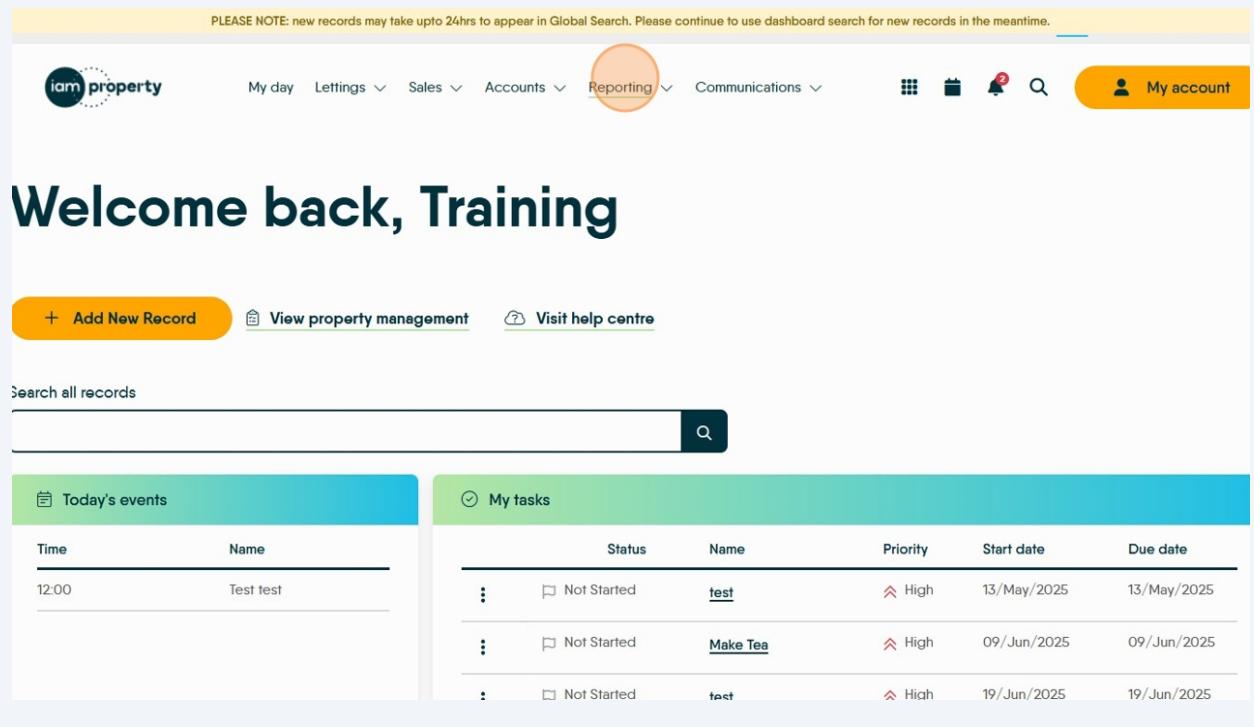
The main area features a large 'Welcome back, Training' message. Below it are two buttons: '+ Add New Record' (orange) and 'View property management' (green). A search bar with the placeholder 'Search all records' is also present.

The dashboard is divided into two main sections:

- Today's events:** A table with columns 'Time' and 'Name'. One entry is listed: '12:00 Test test'.
- My tasks:** A table with columns 'Status', 'Name', 'Priority', 'Start date', and 'Due date'. Four tasks are listed:

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 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.

My day Lettings Sales Accounts Reporting Communications

My account

Welcome back, Training

+ Add New Record View property management Visit help centre

Search all records

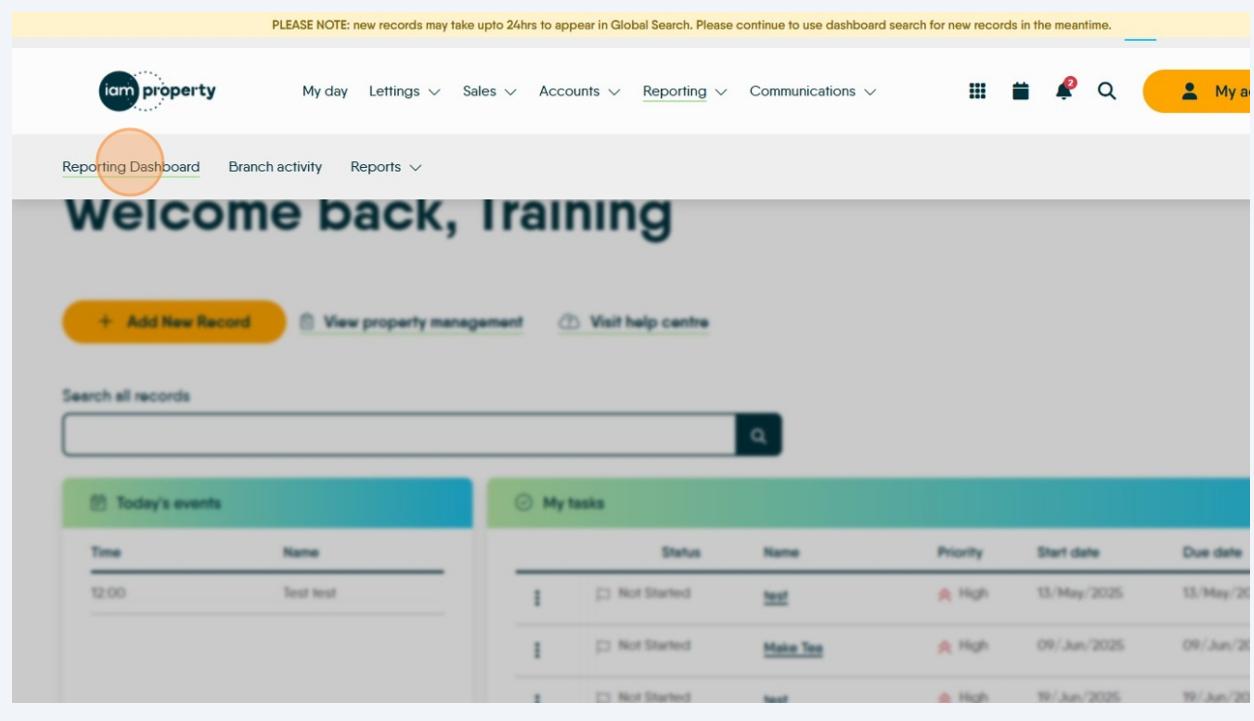
Today's events

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.

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 up to 24hrs to appear in Global Search. Please continue to use dashboard search for new records in the meantime.

My day Lettings Sales Accounts Reporting Communications

My acc

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

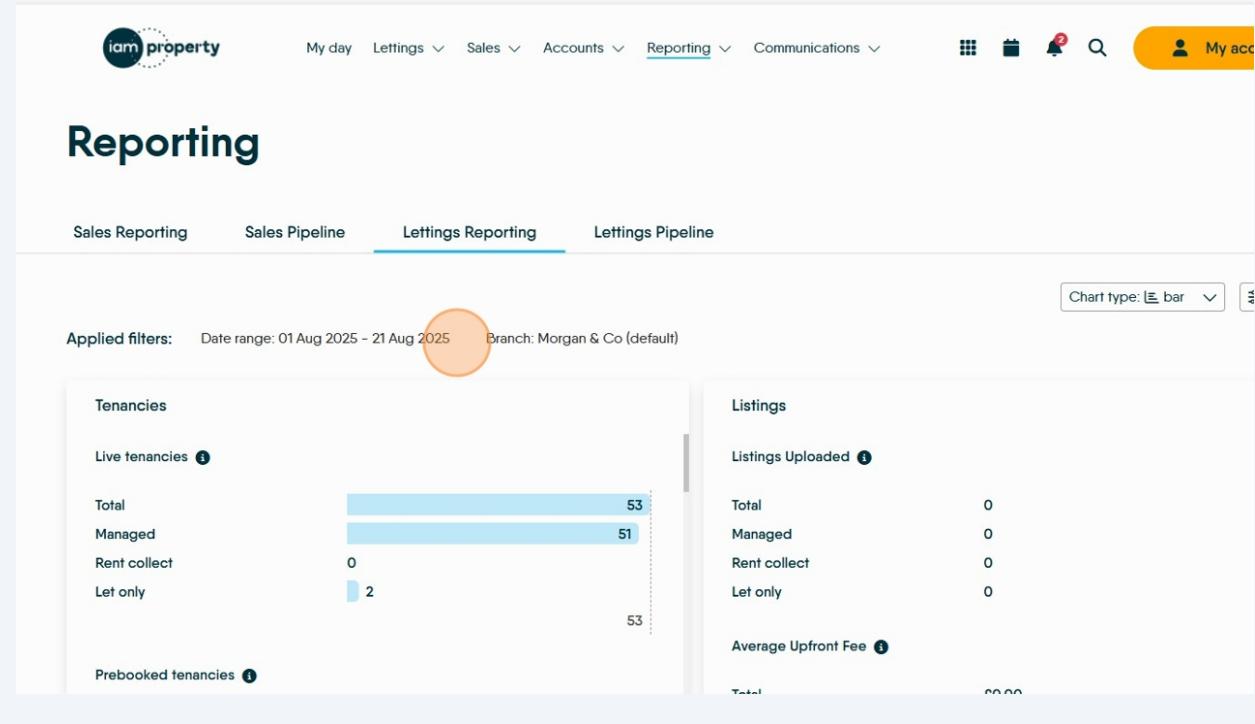
Total ⓘ	1
Booked ⓘ	0
Outcome Pending ⓘ	0
Won ⓘ	1
Lost ⓘ	0

Listings

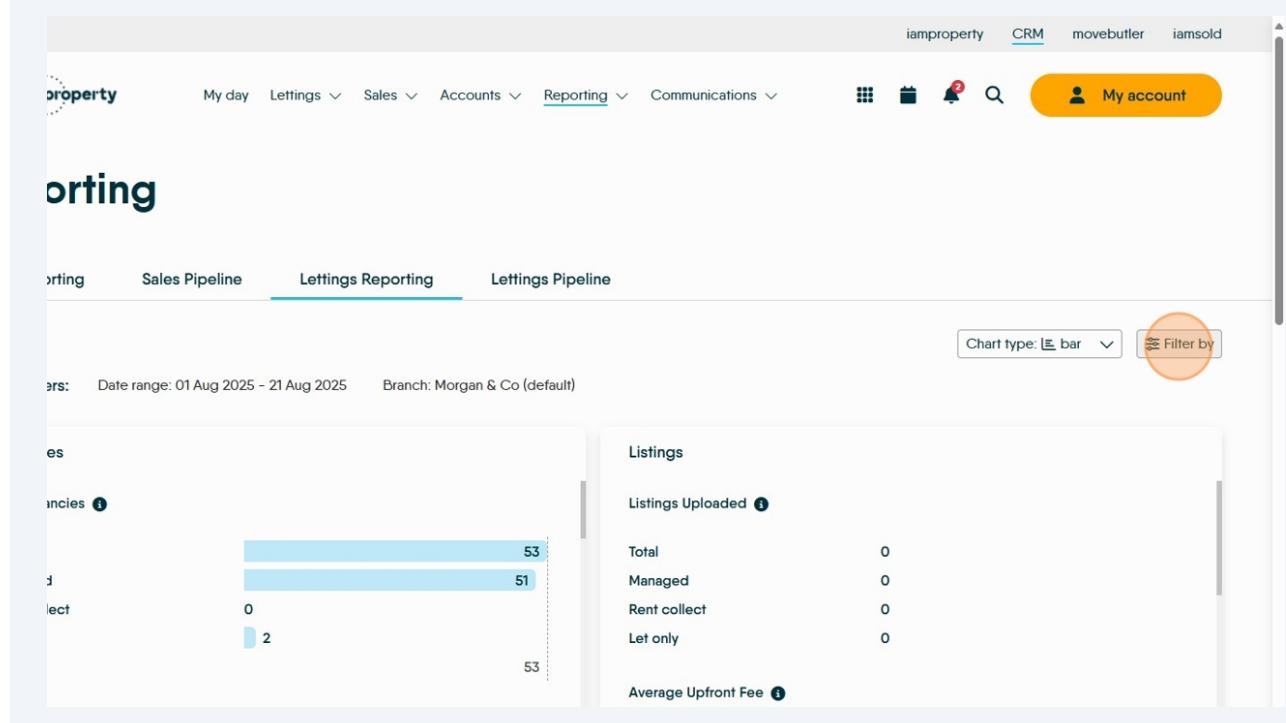
Instructions	
Uploaded ⓘ	
Instructions uploaded	
Total Fees ⓘ	1

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.

The screenshot shows the 'Reporting' section of the iamproperty interface. A modal window titled 'Filter by' is open. The 'Date range' section has 'Start date' set to '01/08/2025' and 'End date' set to '21/08/2025'. Below these are four buttons: 'Month to date', 'Previous 30 days', 'Previous month', and 'This year (Jan - Today)'. The 'Branches' section shows 'Morgan & Co (default)' selected with a checked checkbox. There are also checkboxes for 'Morgan&Co MB' and 'Reports & Letters', neither of which is checked. At the bottom of the modal is a yellow 'Apply filters' button.

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

The screenshot shows the 'Reporting' section of the iamproperty interface. A modal window titled 'Filter by' is open. The 'Date range' section has 'Start date' set to '01/08/2025' and 'End date' set to '21/08/2025'. Below these are four buttons: 'Month to date', 'Previous 30 days', 'Previous month', and 'This year (Jan - Today)'. The 'Branches' section shows 'Morgan & Co (default)' selected with a checked checkbox. There are also checkboxes for 'Morgan&Co MB' and 'Reports & Letters', neither of which is checked. At the bottom of the modal is a yellow 'Apply filters' button.

Reporting

Sales Reporting Sales Pipeline

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

Tenancies

Live tenancies: 1

Total: 0 Managed: 0 Rent collect: 0 Let only: 2

Prebooked tenancies: 1

Total: 90 Managed: 0

Stock

Appraisals

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

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**

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

Tenancies

Live tenancies: 1

Total: 53 Managed: 51 Rent collect: 0 Let only: 2

Prebooked tenancies: 1

Total: 90 Managed: 0

Stock

Listings

Listings Uploaded: 1

Total: 0 Managed: 0 Rent collect: 0 Let only: 0

Average Upfront Fee: 1

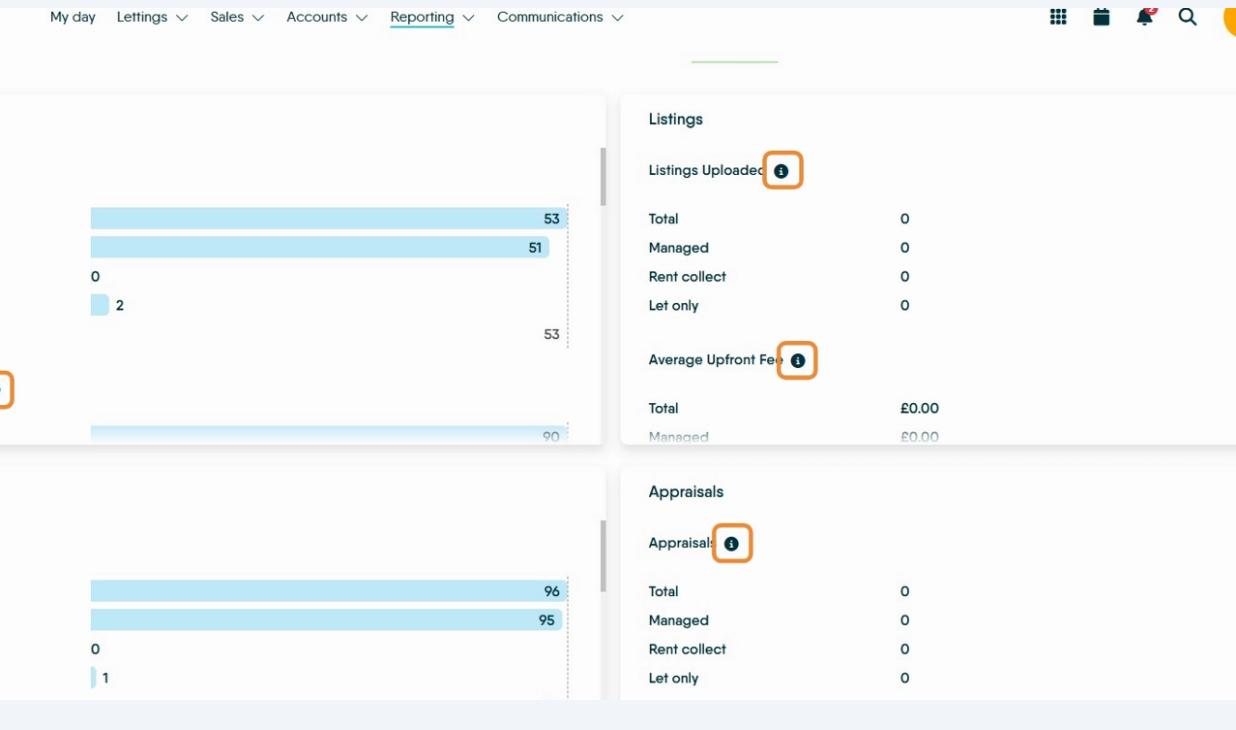
Total: £0.00 Managed: £0.00

Appraisals

11

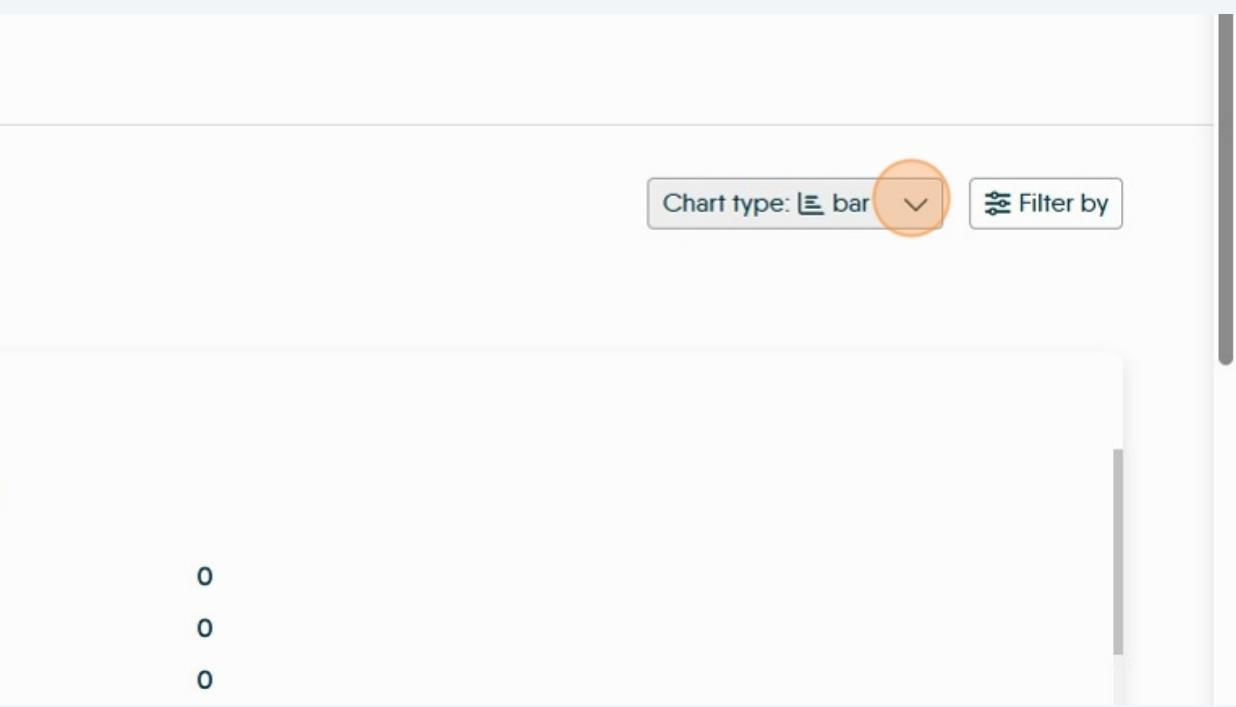
You will now be able to view the combined figures for all your selected branches within your selected date range.

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

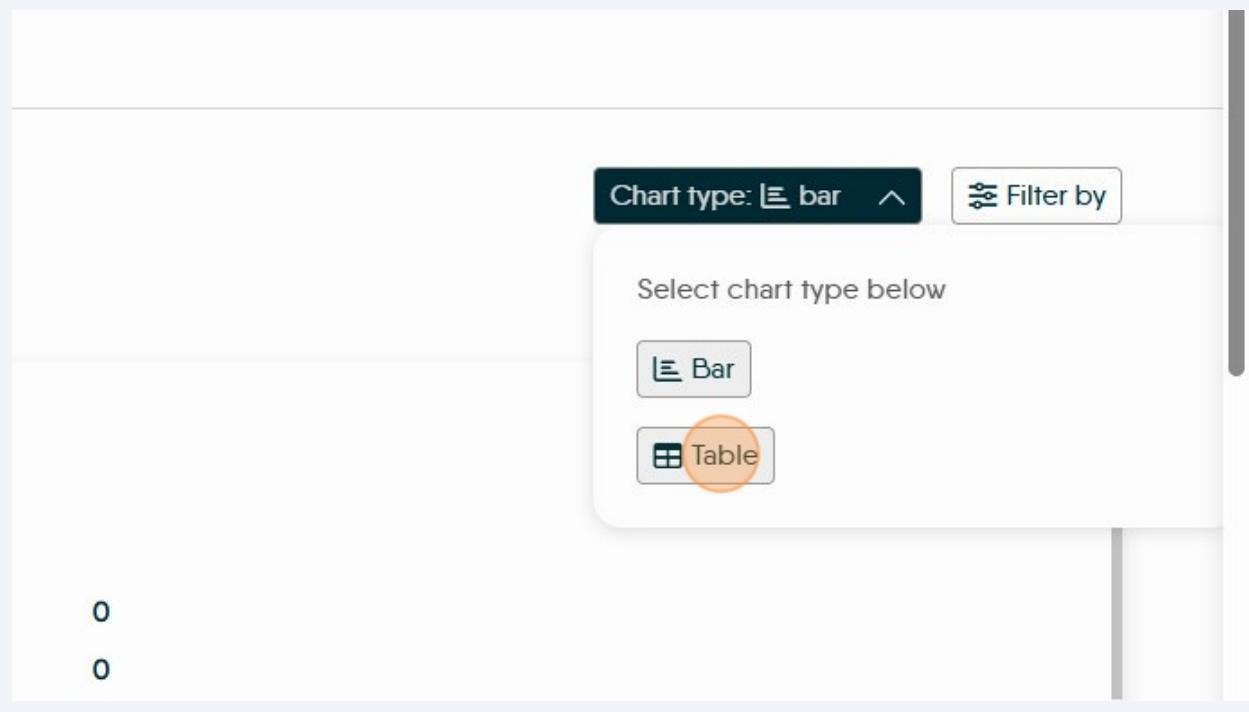


12

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.

The screenshot shows the reporting interface with data broken down by branch. The top navigation bar includes "My day", "Lettings", "Sales", "Accounts", "Reporting" (which is underlined, indicating it's the active tab), and "Communications". The reporting section is titled "Maintenance". It shows two rows of data:

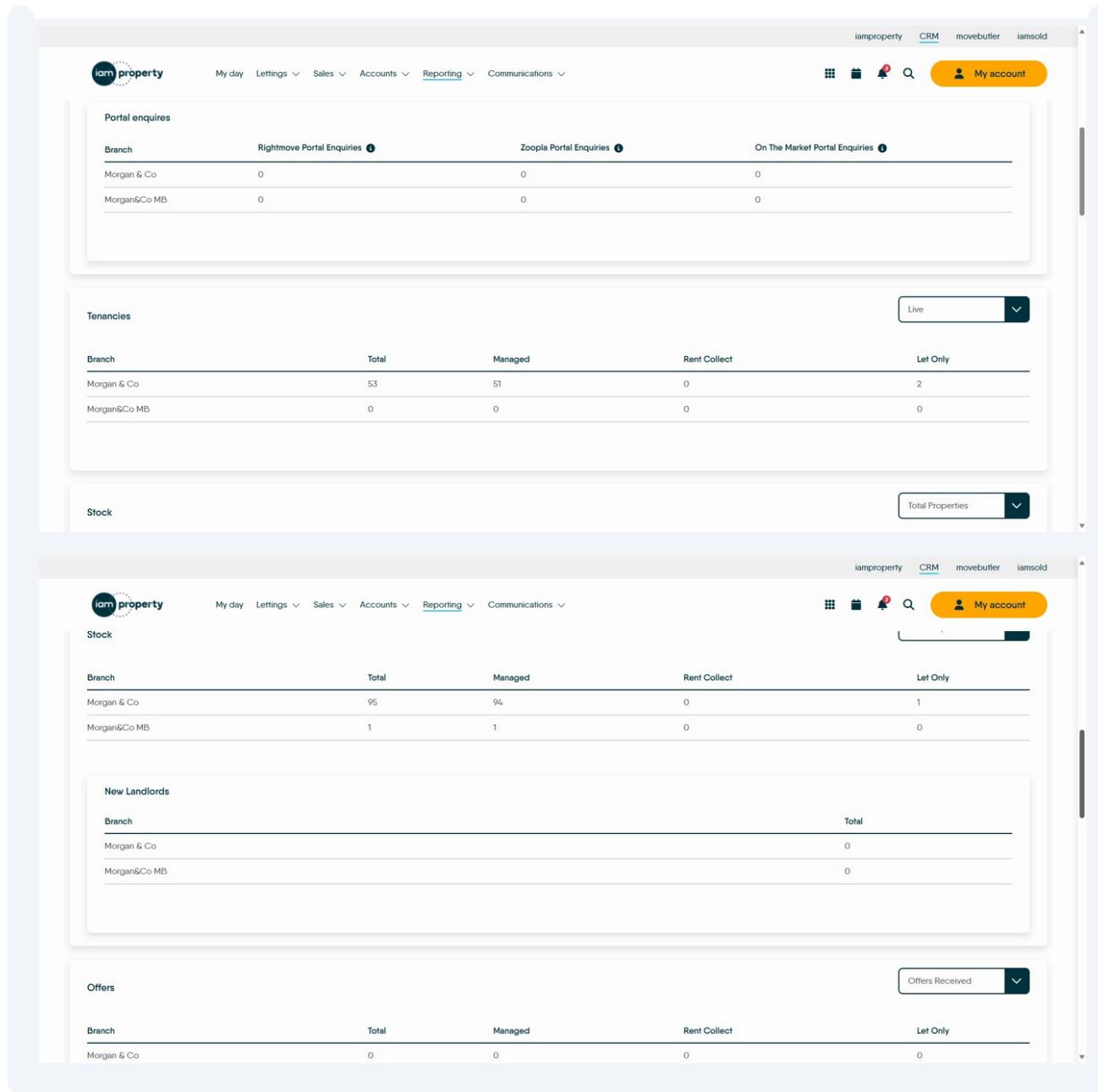
Branch	Total	Managed	Rent Collect	Let Only
Morgan & Co	40	40	0	0
Morgan&Co MB	0	0	0	0

Below this is a "Viewings" section with one row of data:

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

Finally, there is a "Portal enquiries" section with two rows of data:

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



The screenshot displays the iamp property software interface, specifically the Reporting and Communications sections. The top navigation bar includes links for My day, Lettings, Sales, Accounts, Reporting (which is currently selected), and Communications. The top right features icons for CRM, movebutler, and iamsold, along with a 'My account' button.

Portal enquiries

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

Tenancies

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

Stock

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

New Landlords

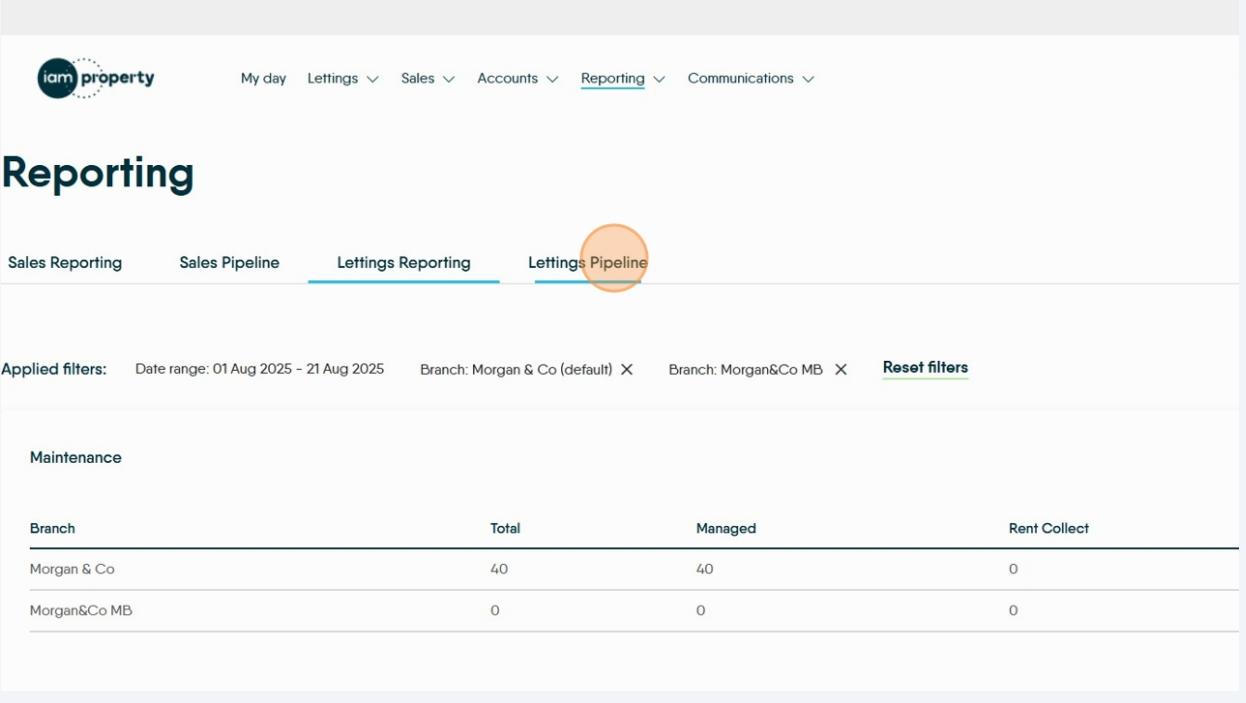
Branch	Total
Morgan & Co	0
Morgan&Co MB	0

Offers

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

Lettings Pipeline

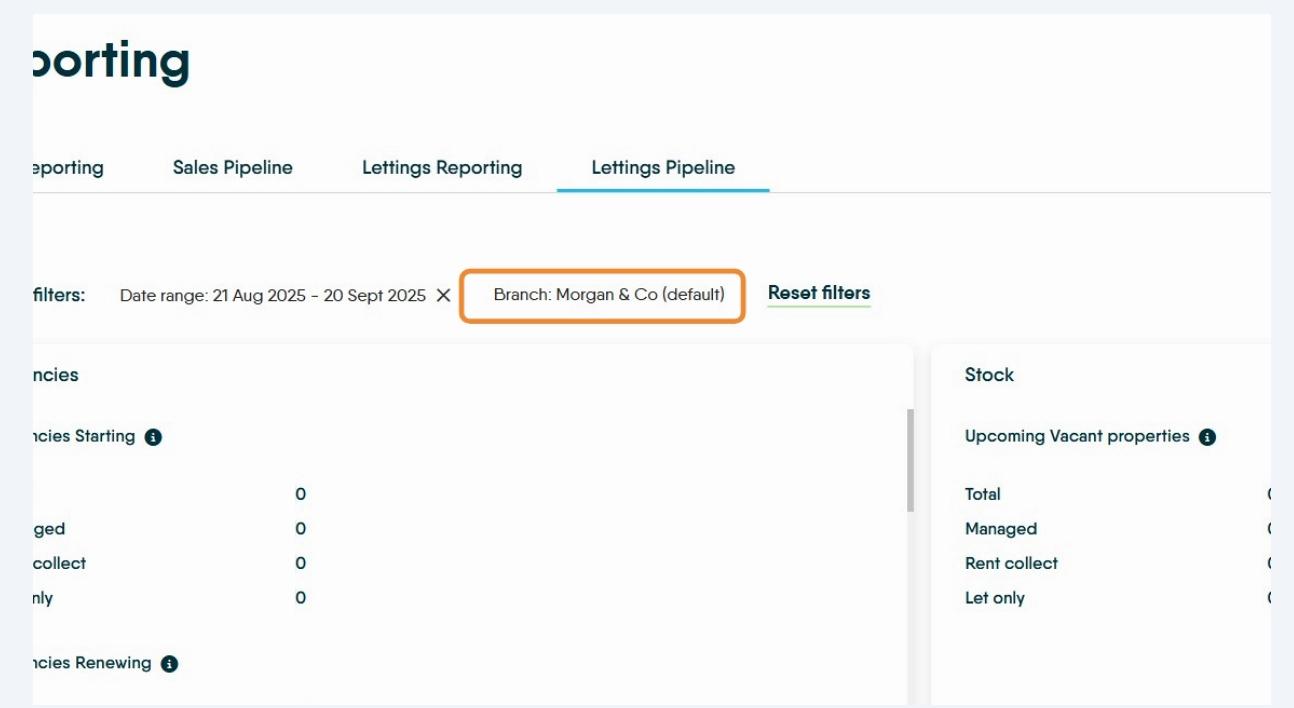
15 Click "Lettings Pipeline"



The screenshot shows the iamp property Reporting interface. At the top, there is a navigation bar with links: My day, Lettings, Sales, Accounts, Reporting (which is underlined in blue), and Communications. Below the navigation bar, the word "Reporting" is displayed in a large, bold, dark blue font. Underneath "Reporting", there are four tabs: Sales Reporting, Sales Pipeline, Lettings Reporting, and Lettings Pipeline. The "Lettings Pipeline" tab is highlighted with a blue underline and has a light orange circle drawn around it. Below the tabs, there is a section for "Applied filters" with a date range of "01 Aug 2025 - 21 Aug 2025", a branch filter for "Morgan & Co (default)" with a close button, and another branch filter for "Morgan&Co MB" with a close button. A "Reset filters" link is also present. The main content area is titled "Maintenance" and contains a table with four columns: Branch, Total, Managed, and Rent Collect. The table has two rows: one for "Morgan & Co" with values 40, 40, and 0; and one for "Morgan&Co MB" with values 0, 0, and 0.

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.



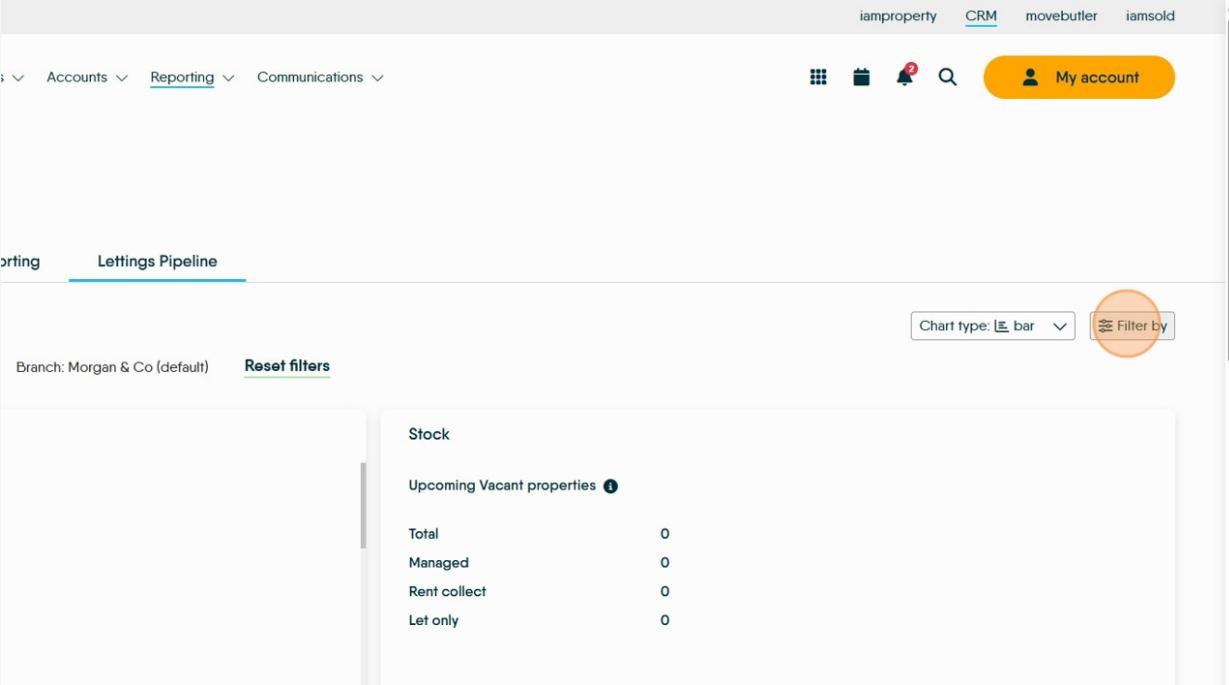
The screenshot shows the iamp property Reporting interface. At the top, there is a navigation bar with links: Reporting (which is underlined in blue), Sales Pipeline, Lettings Reporting, and Lettings Pipeline. Below the navigation bar, there is a "filters" section with a date range of "21 Aug 2025 - 20 Sept 2025" and a branch filter for "Morgan & Co (default)". The "Branch: Morgan & Co (default)" link is highlighted with an orange box. A "Reset filters" link is also present. The main content area is titled "Maintenance" and contains two sections: "Properties Starting" and "Properties Renewing". The "Properties Starting" section shows a table with four rows: "Total" (0), "Managed" (0), "Rent collect" (0), and "Let only" (0). The "Properties Renewing" section shows a table with four rows: "Total" (0), "Managed" (0), "Rent collect" (0), and "Let only" (0). To the right of these sections, there is a "Stock" sidebar with a section titled "Upcoming Vacant properties" and a table with four rows: "Total" (0), "Managed" (0), "Rent collect" (0), and "Let only" (0).

Total	Managed	Rent collect	Let only
0	0	0	0
0	0	0	0
0	0	0	0
0	0	0	0

Total	Managed	Rent collect	Let only
0	0	0	0
0	0	0	0
0	0	0	0
0	0	0	0

17

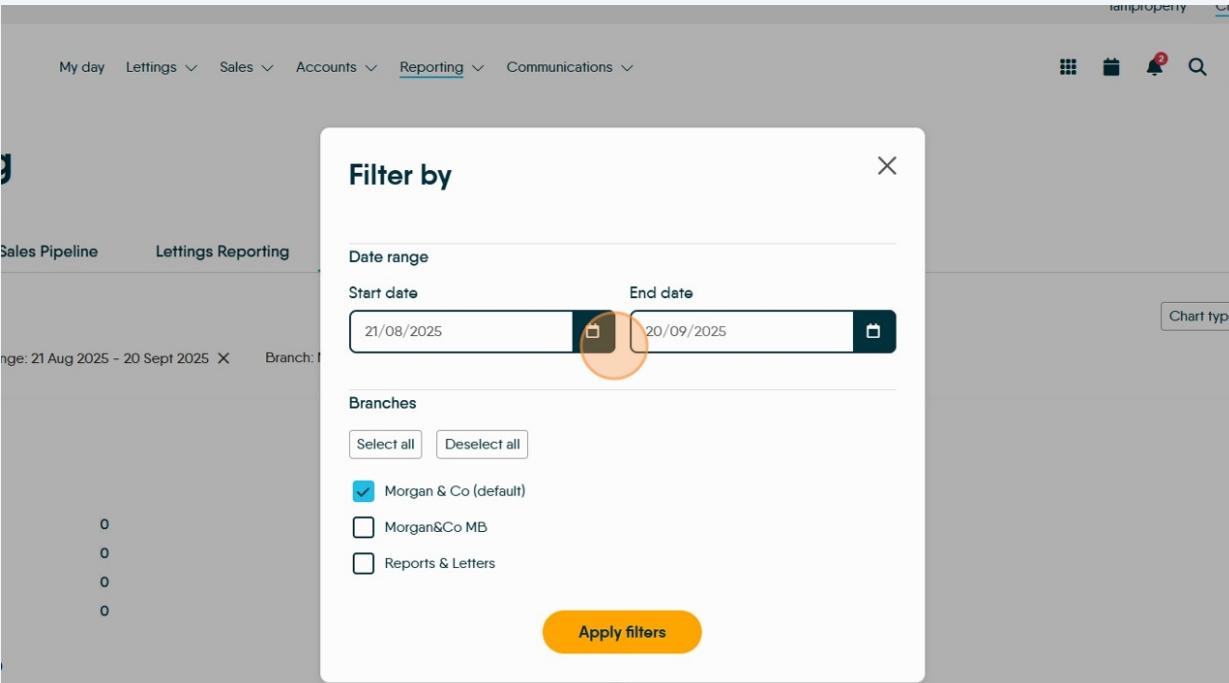
To view more branches, click "Filter By" then select which branches you would like to view.
Click "Apply Filters"



The screenshot shows the iamsold CRM interface. At the top, there are navigation links: Accounts, Reporting (underlined), and Communications. On the right, there are icons for iamproperty, CRM, movebutler, and iamsold, along with a 'My account' button. Below the navigation, there are two tabs: 'Reporting' and 'Lettings Pipeline' (underlined). Under 'Reporting', it says 'Branch: Morgan & Co (default)' and 'Reset filters'. The main content area is titled 'Stock' and shows 'Upcoming Vacant properties' with a count of 0. Below this, there are four categories: Total (0), Managed (0), Rent collect (0), and Let only (0).

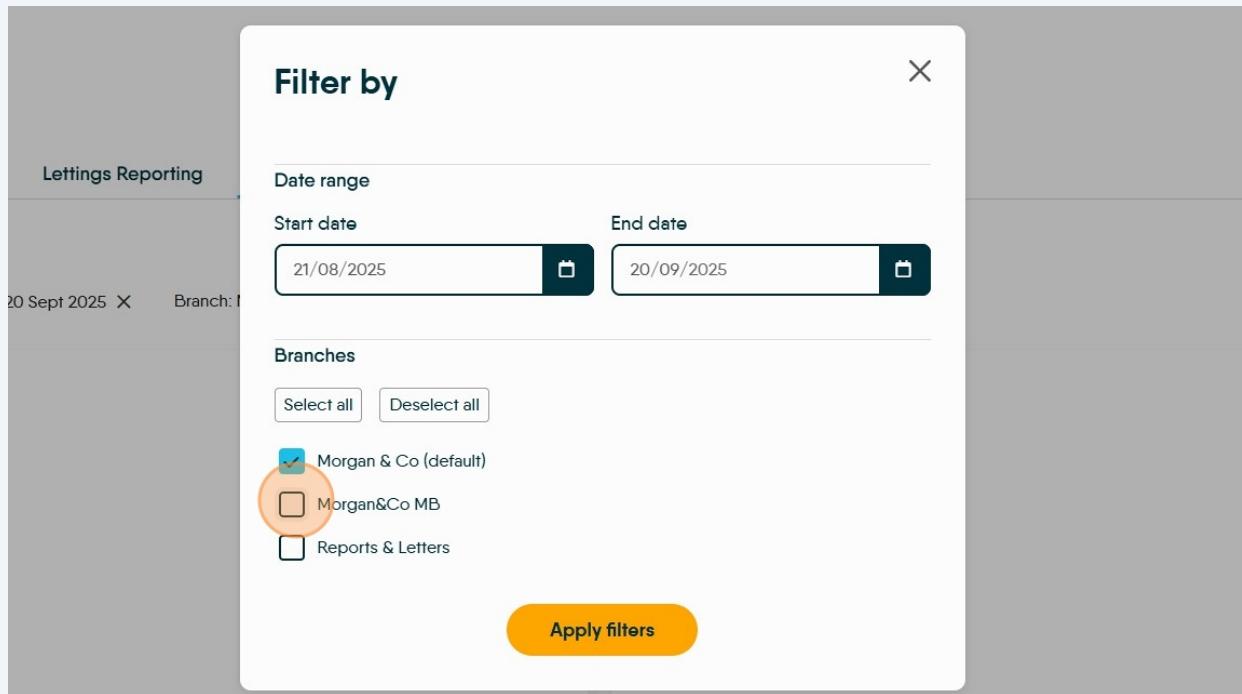
18

Click "Start date, End date"

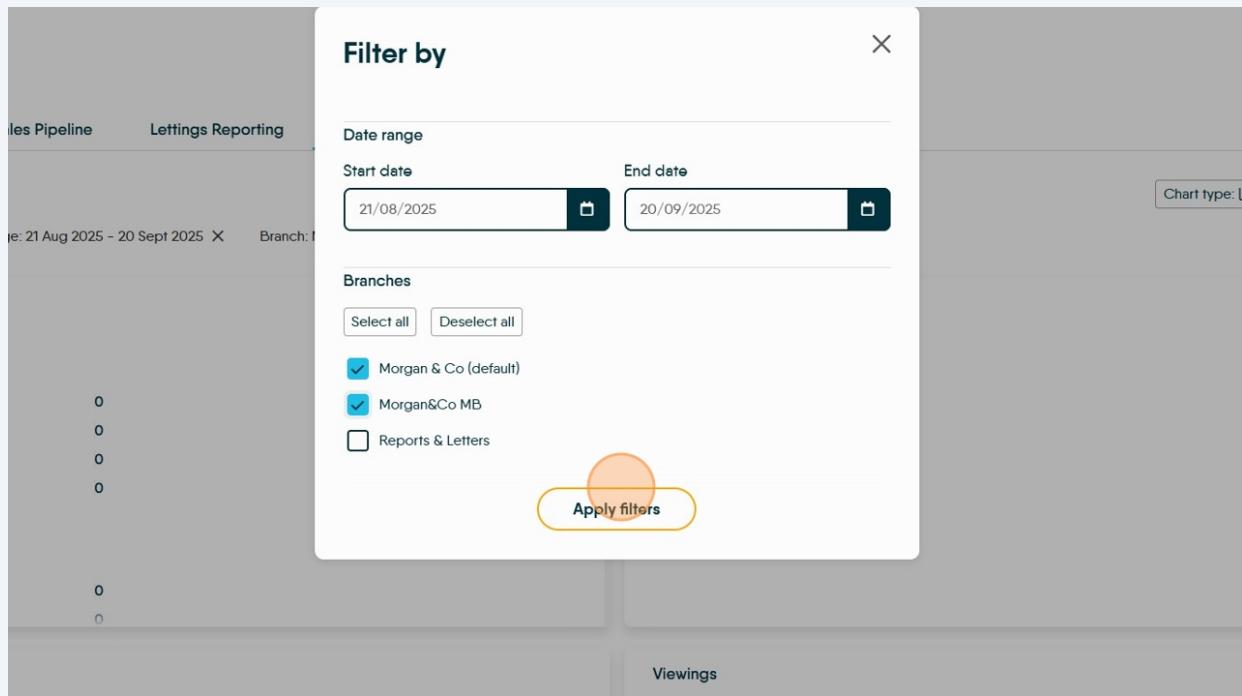


The screenshot shows the iamsold CRM interface with a 'Filter by' dialog box overlaid. The dialog box has a title 'Filter by' and a close button 'X'. It contains a 'Date range' section with 'Start date' (21/08/2025) and 'End date' (20/09/2025) fields, both of which are highlighted with an orange circle. Below this is a 'Branches' section with 'Select all' and 'Deselect all' buttons, and three checkboxes: 'Morgan & Co (default)' (checked), 'Morgan&Co MB' (unchecked), and 'Reports & Letters' (unchecked). At the bottom is an 'Apply filters' button.

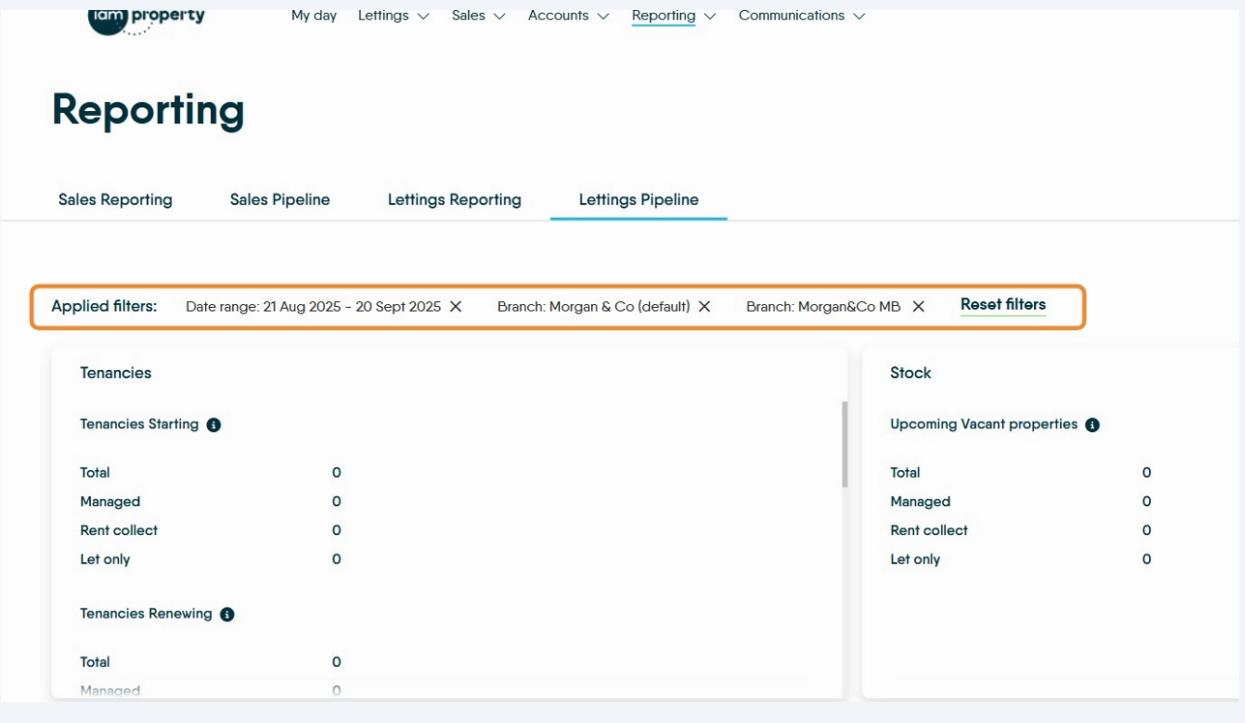
19 Click the branches you want to select.



20 Click "Apply filters"

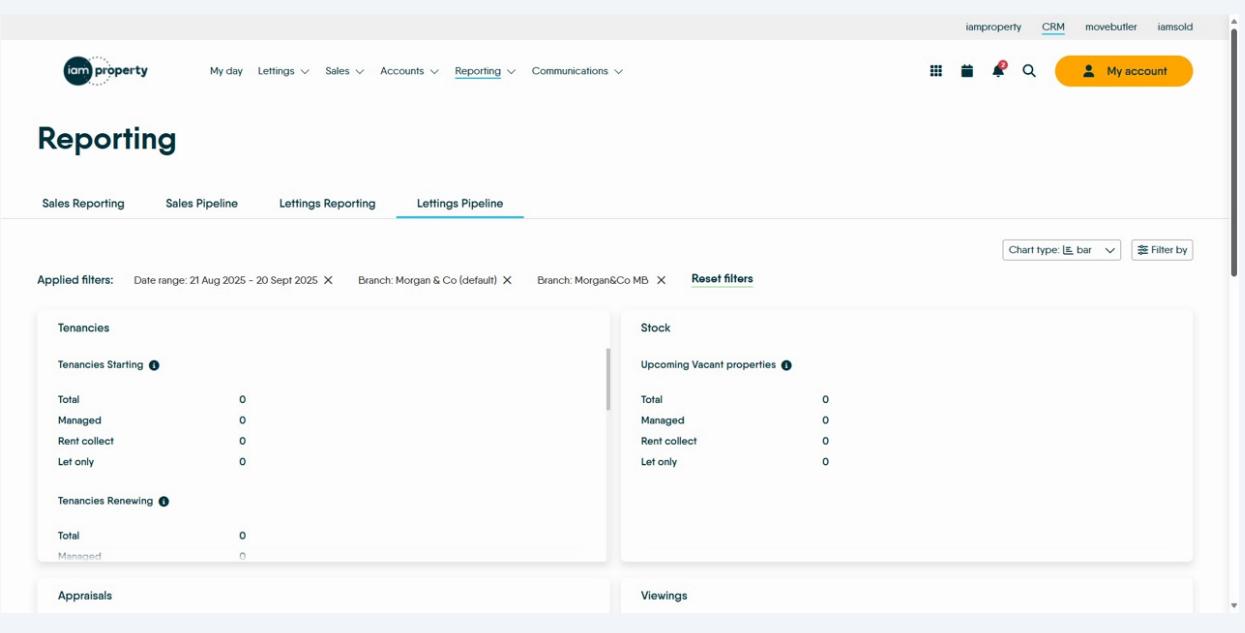


21 The date range and branch filters will show.



The screenshot shows the 'Reporting' section of the iam property software. At the top, there are navigation links: 'My day', 'Lettings', 'Sales', 'Accounts', 'Reporting' (which is underlined in blue), and 'Communications'. Below this, the word 'Reporting' is displayed in a large, bold, dark teal font. Underneath, there are four tabs: 'Sales Reporting', 'Sales Pipeline', 'Lettings Reporting', and 'Lettings Pipeline', with 'Lettings Pipeline' being the active tab. A banner at the top indicates 'Applied filters: Date range: 21 Aug 2025 - 20 Sept 2025 X Branch: Morgan & Co (default) X Branch: Morgan&Co MB X' and a 'Reset filters' button. The main content is divided into two columns. The left column, titled 'Tenancies', shows data for 'Tenancies Starting' and 'Tenancies Renewing'. The right column, titled 'Stock', shows data for 'Upcoming Vacant properties'. Both columns list categories like 'Total', 'Managed', 'Rent collect', and 'Let only' with a value of '0' for each.

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



The screenshot shows the 'Reporting' section of the iam property software, similar to the previous one but with a table view for branch breakdown. The layout is identical, with the 'Reporting' tab active and the 'Lettings Pipeline' tab selected. The 'Applied filters' banner is present. The main content is organized into four main sections: 'Tenancies' (split into 'Tenancies Starting' and 'Tenancies Renewing'), 'Stock' (split into 'Upcoming Vacant properties'), 'Appraisals', and 'Viewings'. Each section contains the same categories as the previous screenshot ('Total', 'Managed', 'Rent collect', 'Let only') with a value of '0'.



My day Lettings ▾ Sales ▾ Accounts ▾ Reporting ▾ Communications ▾



Tenancies

Tenancies Starting ⓘ

Total	0
Managed	0
Rent collect	0
Let only	0

Tenancies Renewing ⓘ

Total	0
Managed	0

Appraisals

Upcoming Appraisals ⓘ

Total	0
Managed	0
Rent collect	0
Let only	0

Unconfirmed Appraisals ⓘ

Stock

Upcoming Vacant properties ⓘ

Total	0
Managed	0
Rent collect	0
Let only	0

Viewings

Viewings Due ⓘ

Total	0
Managed	0
Rent collect	0
Let only	0

Viewings Unconfirmed ⓘ



My day Lettings ▾ Sales ▾ Accounts ▾ Reporting ▾ Communications ▾



Tenancies

Tenancies Starting ⓘ

Total	0
Managed	0
Rent collect	0
Let only	0

Tenancies Renewing ⓘ

Total	0
Managed	0

Appraisals

Upcoming Appraisals ⓘ

Total	0
Managed	0
Rent collect	0
Let only	0

Unconfirmed Appraisals ⓘ

Stock

Upcoming Vacant properties ⓘ

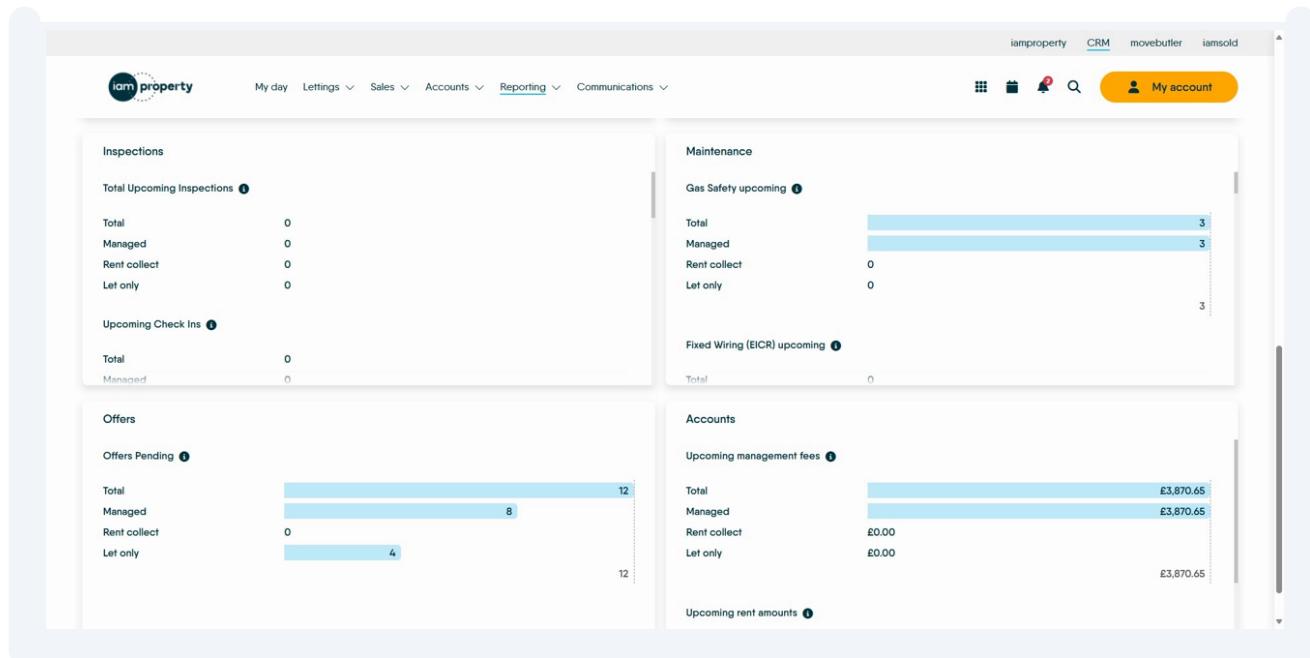
Total	0
Managed	0
Rent collect	0
Let only	0

Viewings

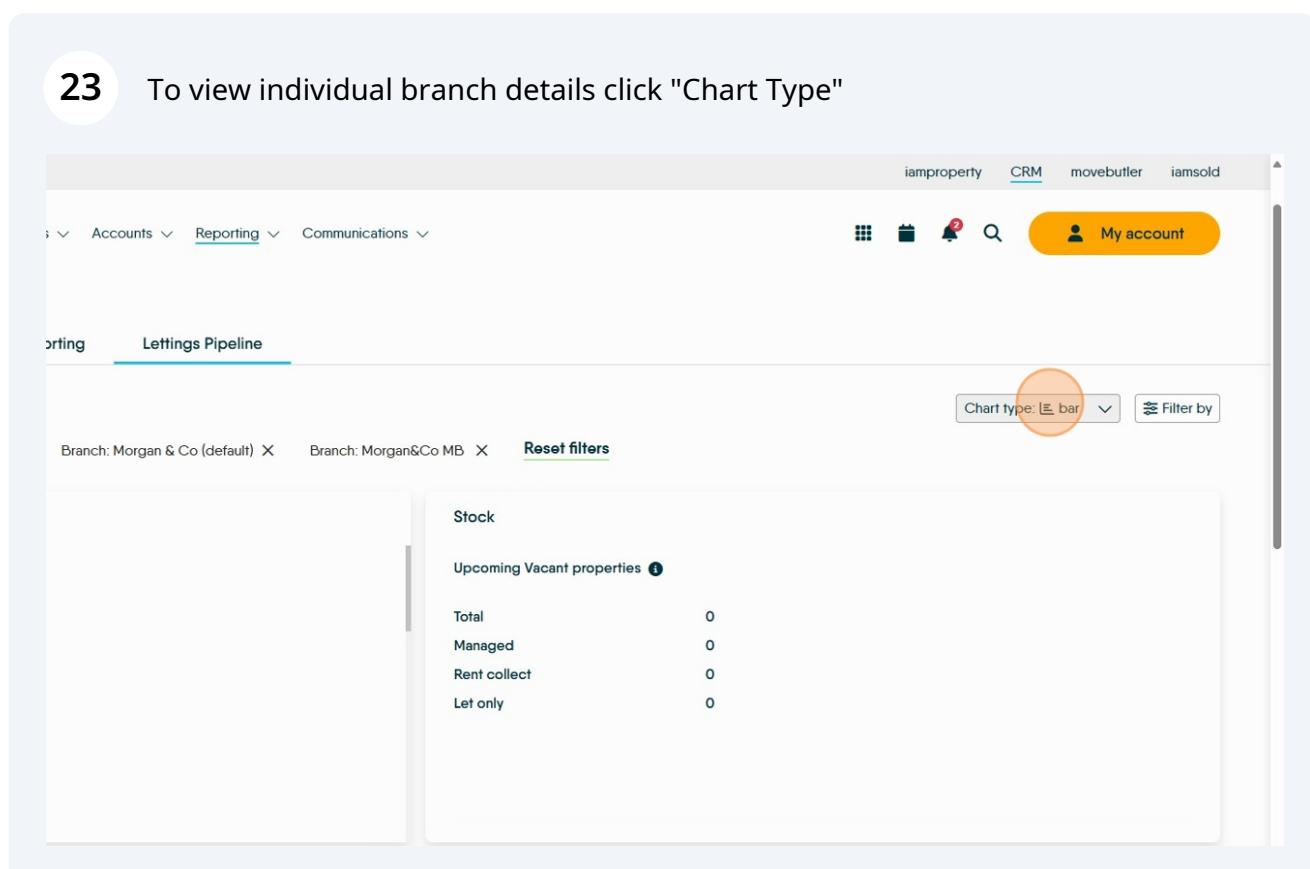
Viewings Due ⓘ

Total	0
Managed	0
Rent collect	0
Let only	0

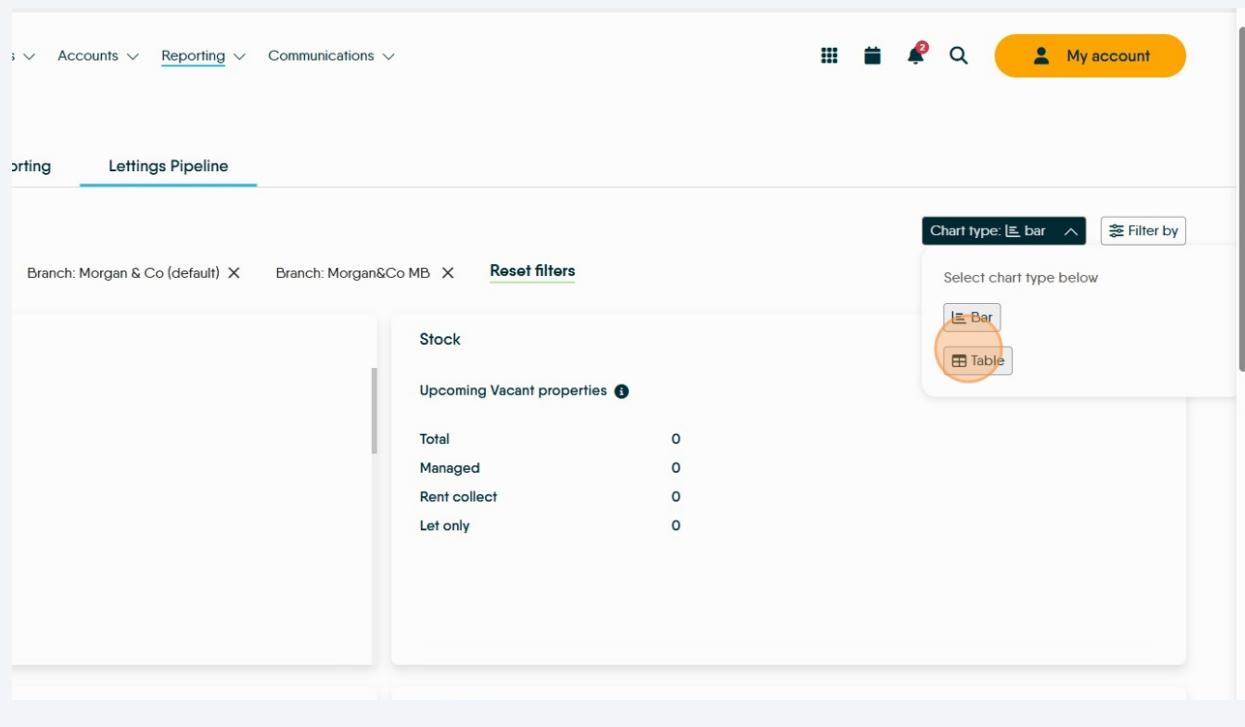
Viewings Unconfirmed ⓘ



23 To view individual branch details click "Chart Type"

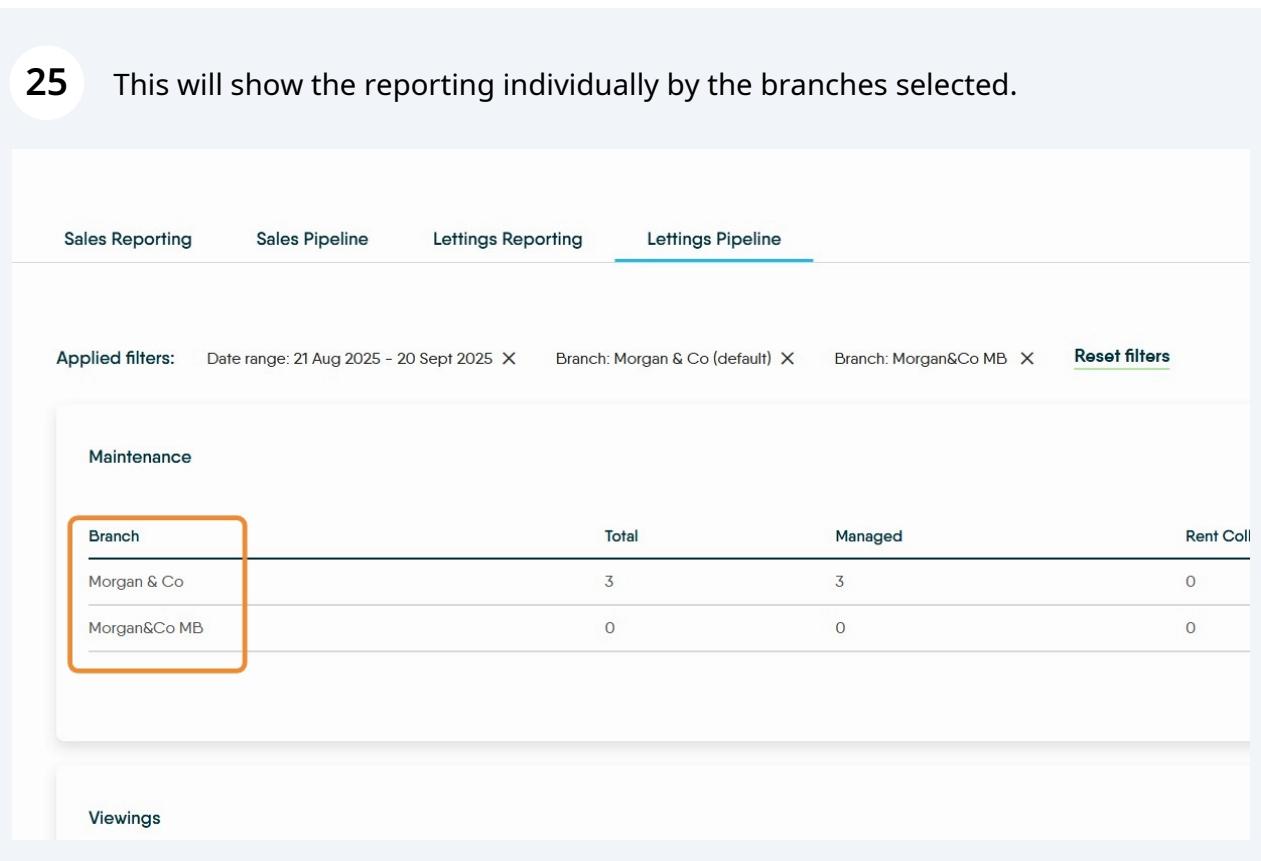


24 Click "Table"



The screenshot shows the 'Reporting' section of the software with the 'Lettings Pipeline' tab selected. At the top, there are navigation links for 'Accounts', 'Reporting' (which is underlined in blue), and 'Communications'. On the right, there are icons for 'My account' and a search bar. Below the tabs, there are two filter sections: 'Branch: Morgan & Co (default)' and 'Branch: Morgan&Co MB'. A 'Reset filters' button is also present. To the right of these filters is a 'Chart type' dropdown menu with 'Bar' and 'Table' options. The 'Table' option is highlighted with an orange circle. The main content area is titled 'Stock' and shows a table for 'Upcoming Vacant properties'. The table has four rows: 'Total' (0), 'Managed' (0), 'Rent collect' (0), and 'Let only' (0).

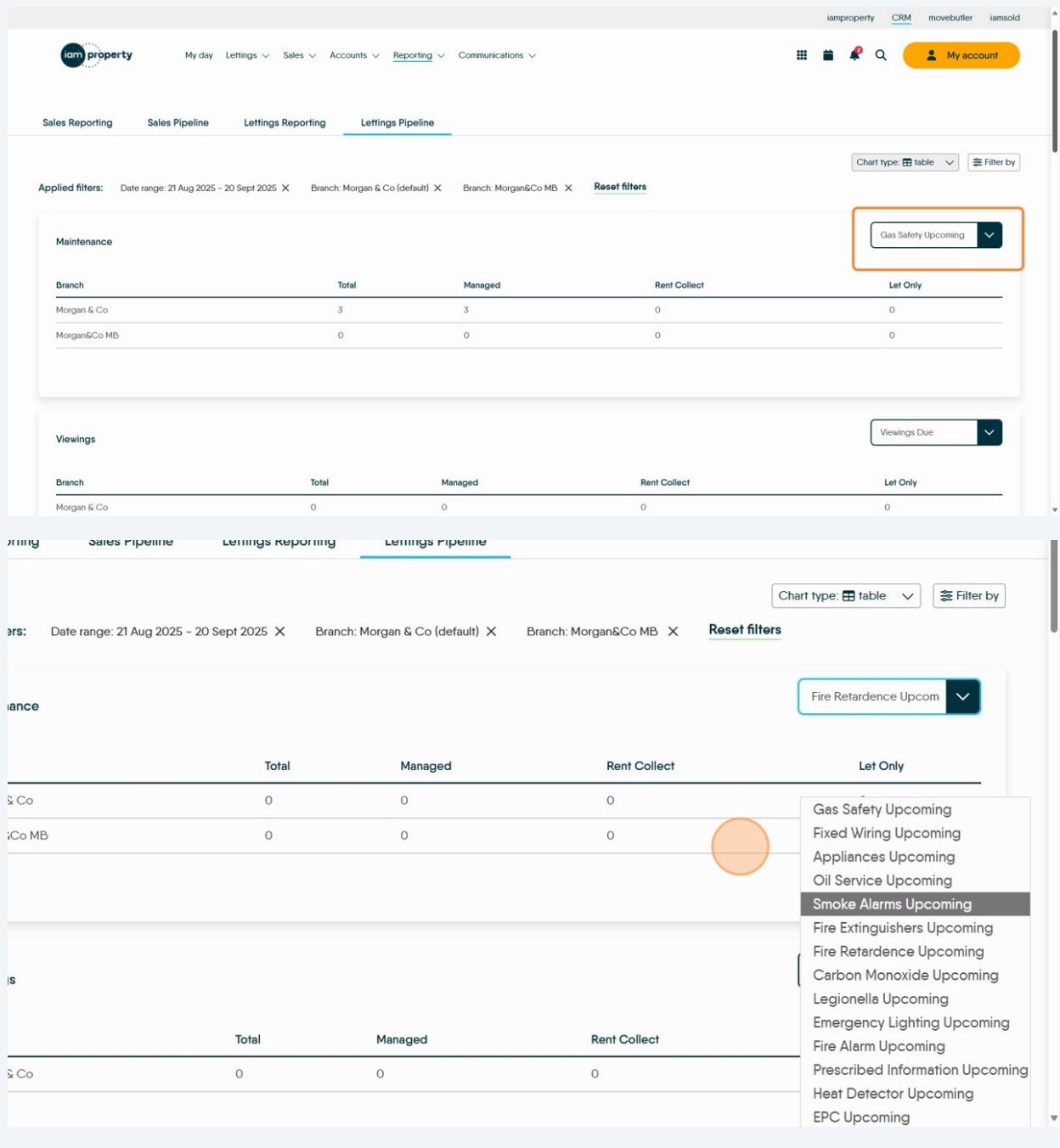
25 This will show the reporting individually by the branches selected.



The screenshot shows the 'Lettings Pipeline' reporting section. At the top, there are tabs for 'Sales Reporting', 'Sales Pipeline', 'Lettings Reporting', and 'Lettings Pipeline', with 'Lettings Pipeline' selected. Below the tabs, there are applied filters: 'Date range: 21 Aug 2025 – 20 Sept 2025', 'Branch: Morgan & Co (default)', and 'Branch: Morgan&Co MB', along with a 'Reset filters' button. The main content area is titled 'Maintenance' and contains a table. The table has a header row with columns 'Branch', 'Total', 'Managed', and 'Rent Coll'. There are two data rows: 'Morgan & Co' with 'Total' 3, 'Managed' 3, and 'Rent Coll' 0; and 'Morgan&Co MB' with 'Total' 0, 'Managed' 0, and 'Rent Coll' 0. The 'Branch' column for both rows is highlighted with an orange box. Below the table is a section titled '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' section of the CRM software. At the top, there are navigation tabs: Sales Reporting, Sales Pipeline, Lettings Reporting, and Lettings Pipeline. The Lettings Pipeline tab is selected. Below the tabs, there are applied filters: Date range: 21 Aug 2025 - 20 Sept 2025, Branch: Morgan & Co (default), and Branch: Morgan&Co MB. There is also a 'Reset filters' button. The main area displays a table for 'Maintenance' with columns: Branch, Total, Managed, Rent Collect, and Let Only. Two rows are shown: Morgan & Co (Total 3, Managed 3, Rent Collect 0, Let Only 0) and Morgan&Co MB (Total 0, Managed 0, Rent Collect 0, Let Only 0). To the right of the table is a dropdown menu with the following options: Gas Safety Upcoming (highlighted with an orange box), Fixed Wiring Upcoming, Appliances Upcoming, Oil Service Upcoming, Smoke Alarms Upcoming (highlighted with a blue box), Fire Extinguishers Upcoming, Fire Retardence Upcoming, Carbon Monoxide Upcoming, Legionella Upcoming, Emergency Lighting Upcoming, Fire Alarm Upcoming, Prescribed Information Upcoming, Heat Detector Upcoming, and EPC Upcoming. The 'Chart type' is set to 'table' and there is a 'Filter by' button. Below the maintenance section, there are other sections: Viewings, Tenancies, Stock, Offers, Appraisals, and Accounts. The 'Tenancies' section is currently selected. It has a similar layout with a table and a dropdown menu for compliance types, including Fire Retardence Upcoming (highlighted with an orange box). The dropdown menu for 'Tenancies' includes: Gas Safety Upcoming, Fixed Wiring Upcoming, Appliances Upcoming, Oil Service Upcoming, Smoke Alarms Upcoming (highlighted with a blue box), Fire Extinguishers Upcoming, Fire Retardence Upcoming, Carbon Monoxide Upcoming, Legionella Upcoming, Emergency Lighting Upcoming, Fire Alarm Upcoming, Prescribed Information Upcoming, Heat Detector Upcoming, and EPC Upcoming.

27

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

iamproperty CRM movebutler iamsold

My day Lettings Sales Accounts Reporting Communications

My account

Tenancies

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

Upcoming Vacant Prop.

Stock

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

Offers Pending

Offers

Upcoming Vacant Prop.

Tenancies

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

Upcoming Vacant Prop.

Stock

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

Offers Pending

Offers

Upcoming Inspections

Inspections

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

Upcoming Appraisals

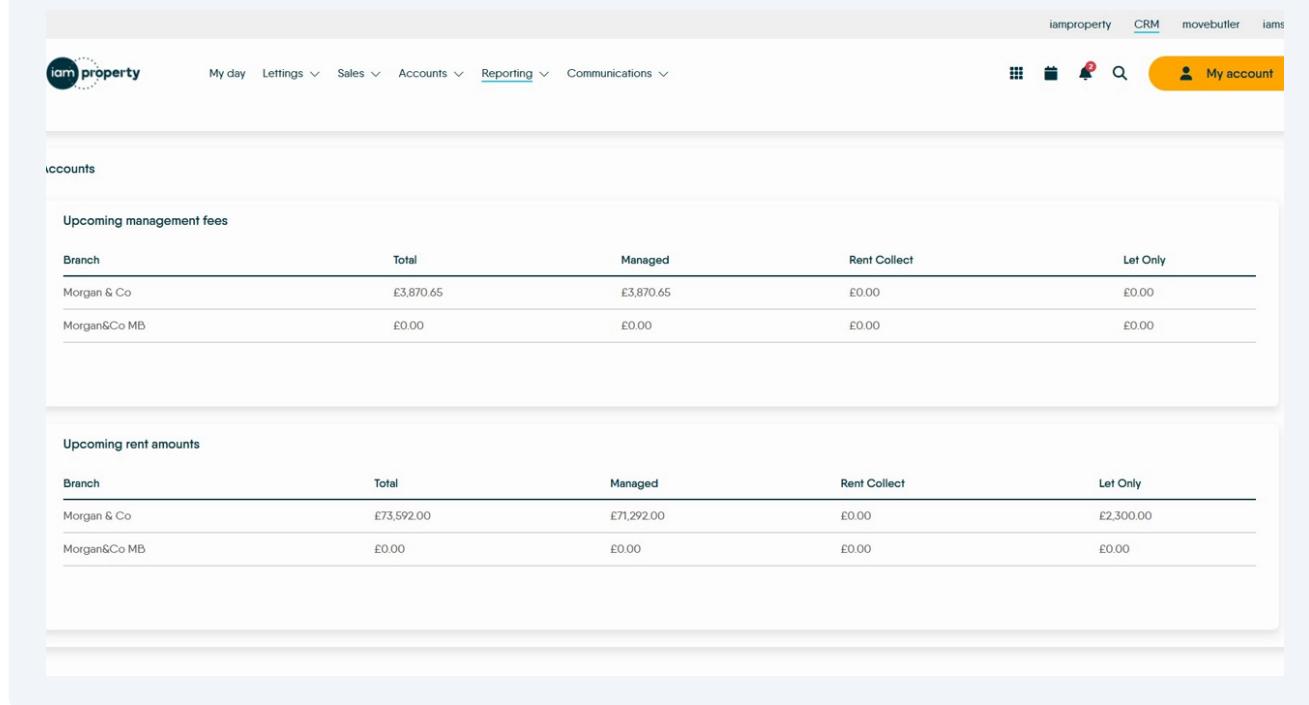
Appraisals

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

Accounts

28

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



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

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