

Filtering Records in the Applicants List



This guide provides a straightforward method for filtering records in the CRM using the 'Explore your...' (aka Search) view.

By following the steps outlined, users can efficiently narrow down their results for a variety of record types applicant list, making it easier to manage and review potential candidates.

1

In this guide we look at the Lettings Applicants list, however there are similar options available for Sales records as well.

Records that can be sorted in the way detailed below are as follows;

Sales;

- Sales Applicant
- Vendor
- Sales Property
- Solicitors
- Sales Compliance (movebutler users only)

Lettings;

- Lettings Applicant
- Landlord
- Lettings Property
- Tenant
- Contractors
- Guarantors

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

The screenshot shows the 'iamproperty' CRM interface. The navigation menu includes 'My day', 'Lettings', 'Sales', 'Accounts', 'Reporting', and 'Communications'. The 'Lettings' menu item is highlighted. Below the navigation is a search bar labeled 'Search all records'. The main content area is divided into two sections: 'Today's events' and 'My tasks'.

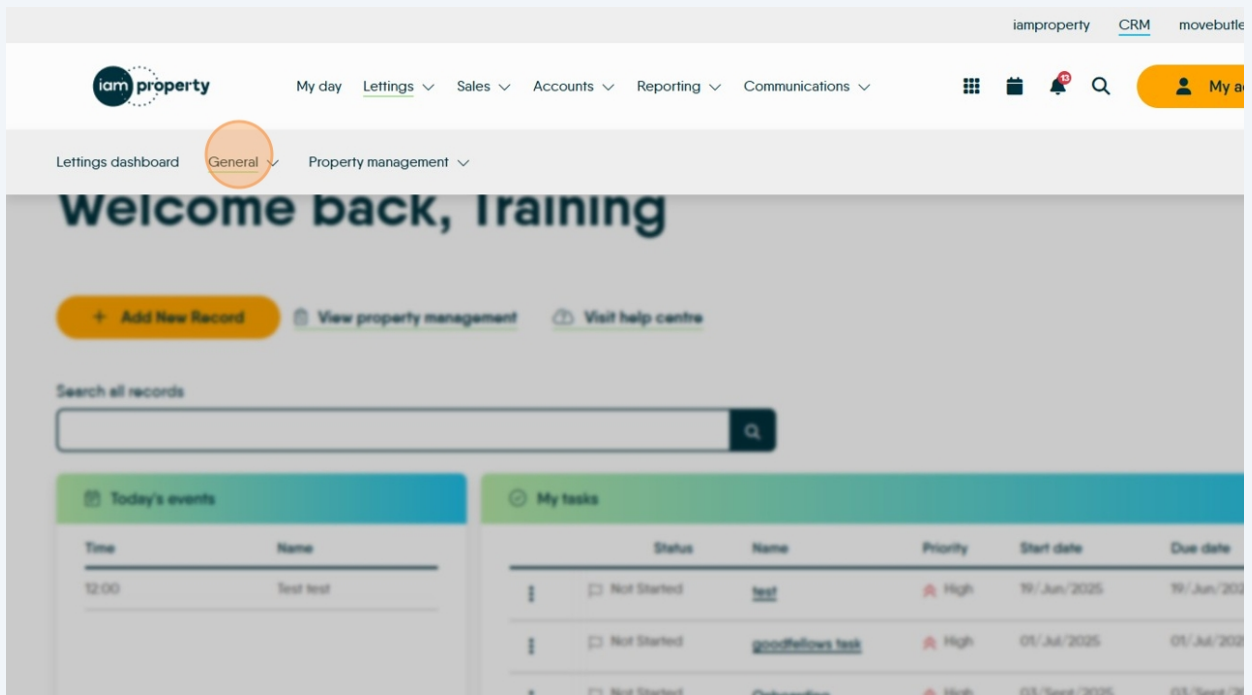
Time	Name
12:00	Test test

Status	Name	Priority	Start date	Due date
Not Started	test	High	19/Jun/2025	19/Jun/2025
Not Started	goodfellows task	High	01/Jul/2025	01/Jul/2025
Not Started	Onboarding	High	03/Sept/2025	03/Sept/2025

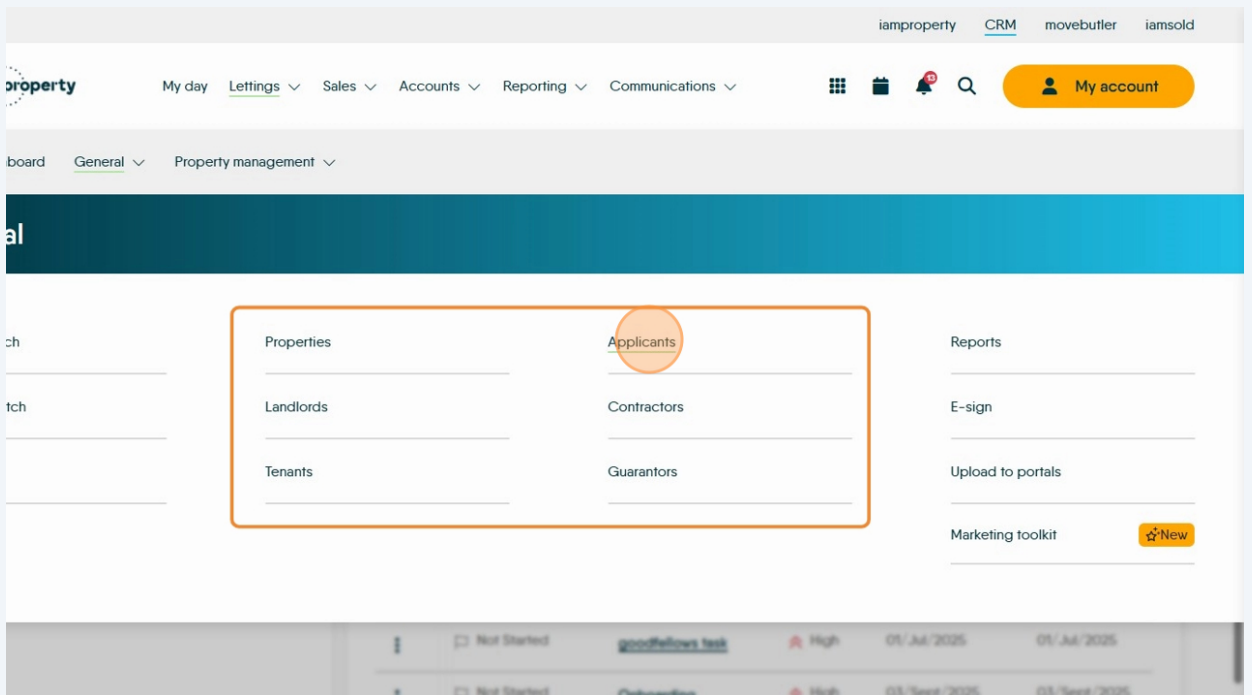
3 Click "Lettings"

This screenshot is identical to the previous one, but with the 'Lettings' menu item in the navigation bar circled in orange to indicate it should be clicked. The rest of the page content, including the search bar and task lists, remains the same.

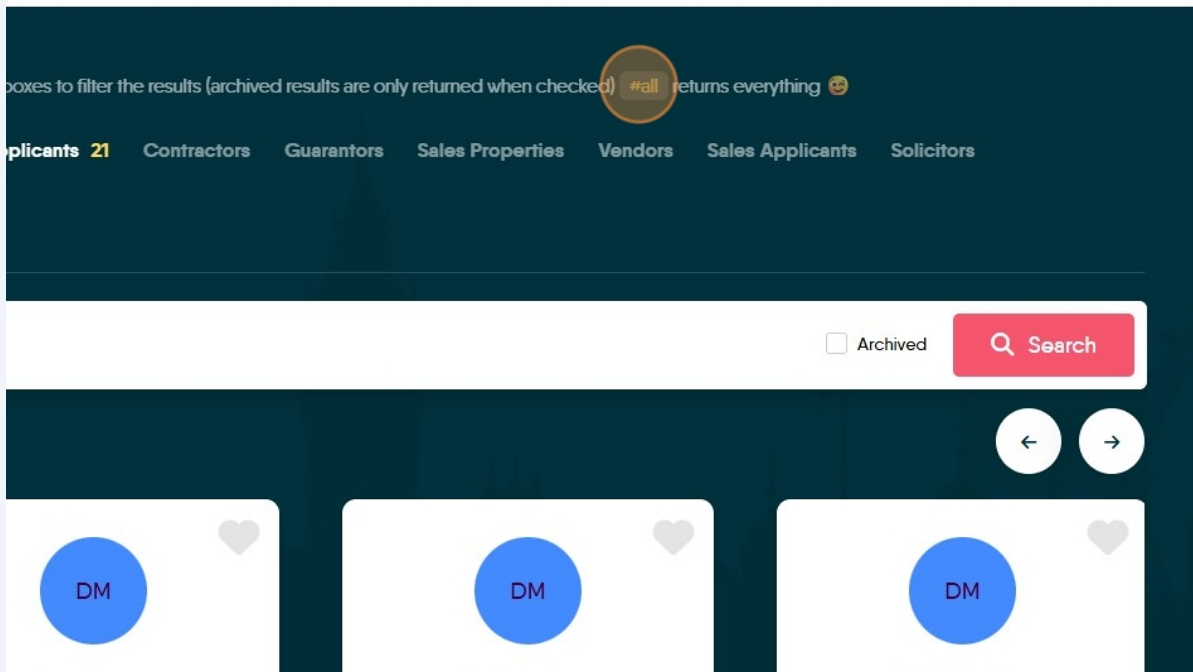
4 Click "General"



5 Click "Applicants" or any option in the highlighted area.

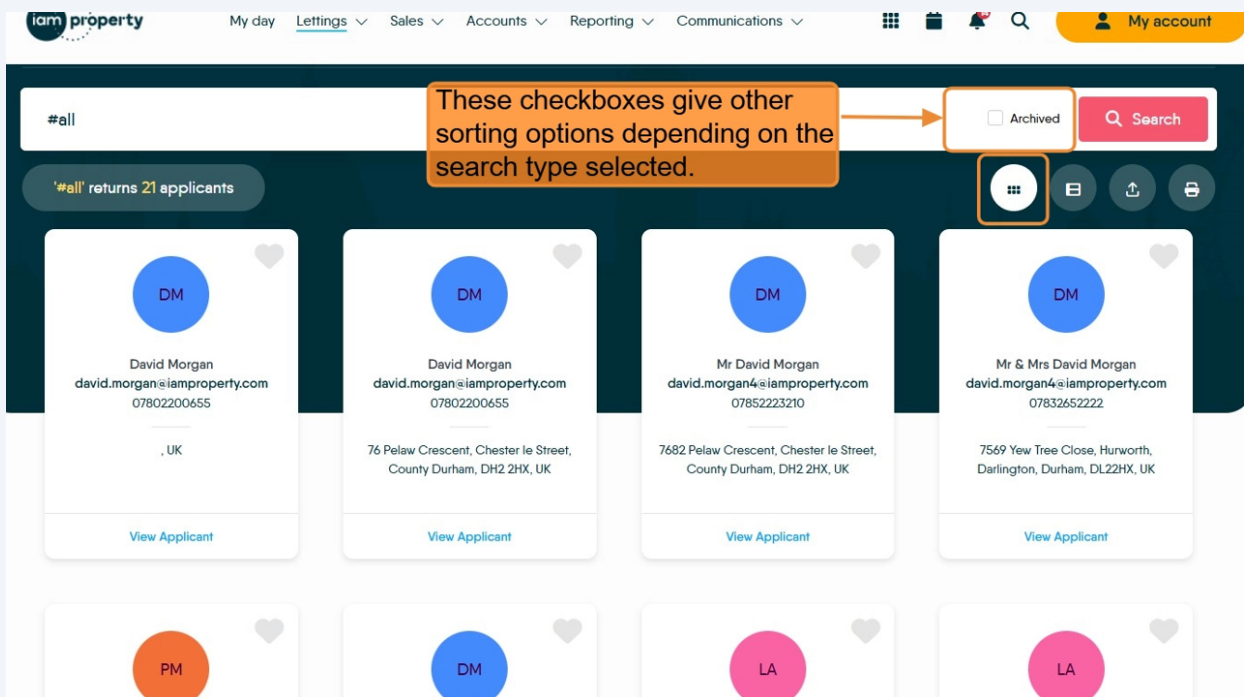


6 Click "#all"



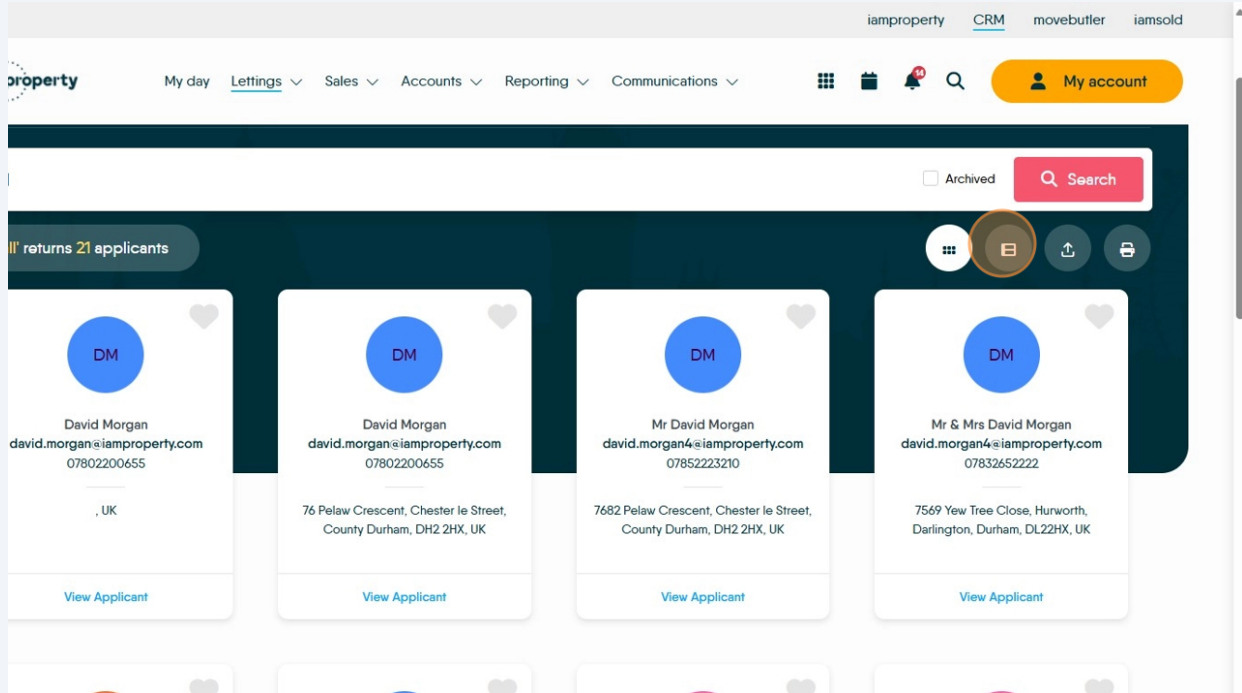
7 There are 2 views a 'tile' view, which is the standard view and can be re selected using the highlighted icon.

The key difference between the 2 options is the 'list' view can be sorted by the header rows and other options, further on in this guide.



8

Click here to select the List view.



The CRM will always show the last chosen listing option Tile or List views.

9 The list view will display like this.

The screenshot shows the CRM interface with a list view of applicants. The top navigation bar includes 'My day', 'Lettings', 'Sales', 'Accounts', 'Reporting', and 'Communications'. A search bar is visible on the right. The main content area displays a table with the following columns: Negotiator, Applicant Name, and Address. A notification bar at the top of the table area indicates '#all returns 21 applicants'.

Negotiator	Applicant Name	Address
Training Dave	David Morgan	, UK
Training Dave	David Morgan	76 Pelaw Crescent, Chester le Street, County Durham, DH2 2HX, UK
Training Dave	Mr David Morgan	7682 Pelaw Crescent, Chester le Street, County Durham, DH2 2HX, UK
Training Dave	Mr & Mrs David Morgan	7569 Yew Tree Close, Hurworth, Darlington, Durham, DL22HX, UK
Training Dave	Mrs Pauline Morgan	Alternative Communication Systems Acer Court, North Leigh Business Park, North Leigh, Witney, Oxfordshire, OX29
Training Dave	Mr David Morgan	158 Yew Tree Close, Hurworth, Darlington, Durham, DL22HX, UK
Training Dave	Mr Lettings Applicant136a	759 Pelaw Crescent, Chester le Street, County Durham, DH2 2HX, UK
Training Dave	Ms Lwttings Applicant136	7871 Pelaw Crescent, Chester le Street, County Durham, DH22HX, UK
Training Dave	applicant135	, UK
Training Dave	lettings.applicant133a	, UK

10 Any of the headings in the highlighted area can be selected and sorted.

This is across all areas of CRM, if there is a header line then, in most cases, it can be clicked on the sort the columns. The exceptions are Landlord and Tenant columns in some lists.

The screenshot shows a detailed list view of applicants. The top navigation bar includes 'Lettings Properties', 'Landlords', 'Tenants', 'Lettings Applicants 21', 'Contractors', 'Guarantors', 'Sales Properties', 'Vendors', 'Sales Applicants', 'Solicitors', and 'Sales Compliance'. A search bar is visible on the right. The main content area displays a table with the following columns: Negotiator, Applicant Name, Address, Max Rent, Min Bedrooms, Phone, Mobile, Email, Move In Date, Branch, Date Added, Applicant Status, and Last Connected. A red box highlights the header row.

Negotiator	Applicant Name	Address	Max Rent	Min Bedrooms	Phone	Mobile	Email	Move In Date	Branch	Date Added	Applicant Status	Last Connected...
Training Dave	David Morgan	, UK	0	0	0186586...	0780220...	david...	12/09/2025	Morgan ...	12/09/2025		
Training Dave	David Morgan	76 Pelaw Crescent, C...	0	0	0186586...	0780220...	david...	12/09/2025	Morgan ...	12/09/2025		
Training Dave	Mr David Morgan	7682 Pelaw Crescent...	1500	2	07852223...	0785222...	david...	21/07/2025	Morgan ...	21/07/2025	Active	
Training Dave	Mr & Mrs David Morgan	7569 Yew Tree Close...	0	0	07832662...	0783266...	david...	21/07/2025	Morgan ...	21/07/2025		
Training Dave	Mrs Pauline Morgan	Alternative Communi...	0	0	01235522...	140044	pmv@m...	01/01/1900	Morgan ...	04/06/2025	Active	
Training Dave	Mr Lettings Applicant136a	759 Pelaw Crescent, ...	0	0	0252555	0454444	zagg.d...	01/01/1900	Morgan ...	21/02/2025	Active	
Training Dave	Ms Lettings Applicant136	7871 Pelaw Crescent...	1800	3		055555	zagg.d...	21/02/2025	Morgan ...	21/02/2025		
Training Dave	applicant135	, UK	1500	3			zagg.d...	20/02/2025	Morgan ...	20/02/2025		
Training Dave	lettings.applicant133a	, UK	1500	3			zagg.d...	04/02/2025	Morgan ...	04/02/2025	Active	
Training Dave	Rightmove Tester	1 Test Road ZX Land, ...	0	0	09999 99...	09999 99...	recicl...	01/01/1900	Morgan ...	14/01/2025	Active	
Training Dave	Rightmove Tester	1 Test Road ZX Land, ...	0	0	09999 99...	09999 99...	recicl...	01/01/1900	Morgan ...	10/01/2025	Active	
Training Dave	Ms Lettings.applicant130	, UK	1500	3	021454612	3545113	zagg.d...	08/02/2025	Morgan ...	07/01/2025	Active	
Training Dave	Rightmove Tester	1 Test Road ZX Land, ...	0	0	09999 99...	09999 99...	recicl...	01/01/1900	Morgan ...	13/12/2024	Active	

11

For example. Click **"Applicant Name"** and the column (and the rest of the data) will sort by Ascending, click again to sort via descending order.

The screenshot shows the IAM Property CRM interface. At the top, there is a navigation bar with the IAM Property logo and various menu items: My day, Lettings, Sales, Accounts, Reporting, and Communications. A search bar is on the right. Below the navigation bar, there is a search filter set to '#all' and a search button. A notification indicates that '#all' returns 21 applicants. The main content is a table with three columns: Negotiator, Applicant Name, and Address. The 'Applicant Name' column header is circled in orange. The table contains several rows of applicant data.

Negotiator ↑	Applicant Name	Address
David-George Morgan	Mr Luca Nugent	12 Dunelm Walk, Darlington, County Durham, DL1 2DL, UK
David-George Morgan	Miss Anne Blyton	The Big House Killin Island, Killin, DL1 OZS, UK
Training Dave	David Morgan	, UK
Training Dave	David Morgan	76 Pelaw Crescent, Chester le Street, County Durham, DH2 2HX, UK
Training Dave	Mr David Morgan	7682 Pelaw Crescent, Chester le Street, County Durham, DH2 2HX, UK
Training Dave	Mr & Mrs David Morgan	7569 Yew Tree Close, Hurworth, Darlington, Durham, DL22HX, UK
Training Dave	Mrs Pauline Morgan	Alternative Communication Systems Acer Court, North Leigh Business Park, North Leigh, Witney, Oxfordshire, C
Training Dave	Mr David Morgan	158 Yew Tree Close, Hurworth, Darlington, Durham, DL22HX, UK

12

Click here on the 3 line menu. This will allow you to filter the data in this column by your own search terms.

The screenshot shows the IAM Property CRM interface, similar to the previous one. The search filter is still '#all'. The table now displays a different set of applicants, all with 'Training Dave' as the negotiator. The 'Applicant Name' column header has a 3-line menu icon next to it, which is circled in orange. This icon is used to filter the data in that column.

Negotiator	Applicant Name ↑	Address
Training Dave	Mr Lettings Applicant	73 Abbey Road, Darlington, County Durham, DL3 8LT, UK
Training Dave	Mr Lettings Applicant103	31 Barrett Road, Darlington, County Durham, DL3 8LA, UK
Training Dave	Ms Lettings applicant130	, UK
Training Dave	lettings applicant133a	, UK
Training Dave	applicant135	, UK
Training Dave	Ms Lwttings Applicant136	7871 Pelaw Crescent, Chester le Street, County Durham, DH22HX, UK
Training Dave	Mr Lettings Applicant136a	759 Pelaw Crescent, Chester le Street, County Durham, DH2 2HX, UK
Training Dave	Sales applicant28	10 Kingsway, Darlington, County Durham, DL1 3EY, UK

13 From this next screen, click **"Contains"**

The screenshot shows the IAM Property CRM interface. At the top, there are navigation tabs for 'My day', 'Lettings', 'Sales', 'Accounts', 'Reporting', and 'Communications'. A search bar on the right contains '#all' and shows '21 applicants'. A table below lists applicants with columns for 'Negotiator', 'Applicant Name', and 'Address'. A dropdown menu is open over the 'Address' column, showing the option 'Contains' selected. The table data is as follows:

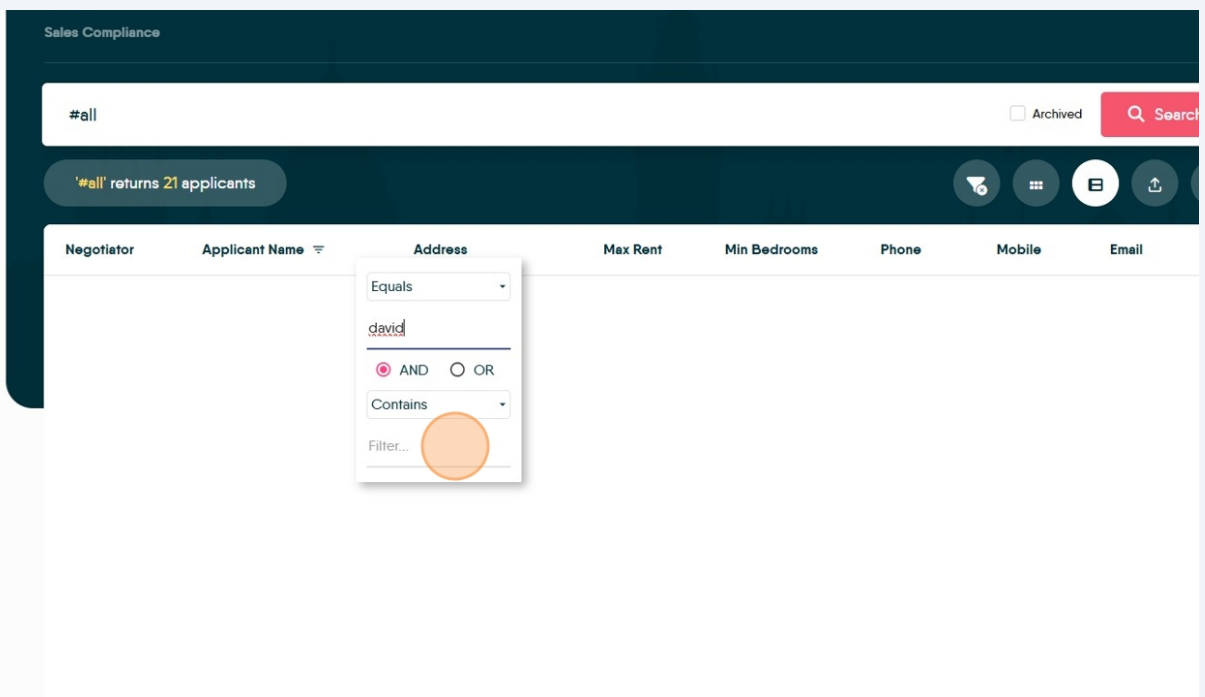
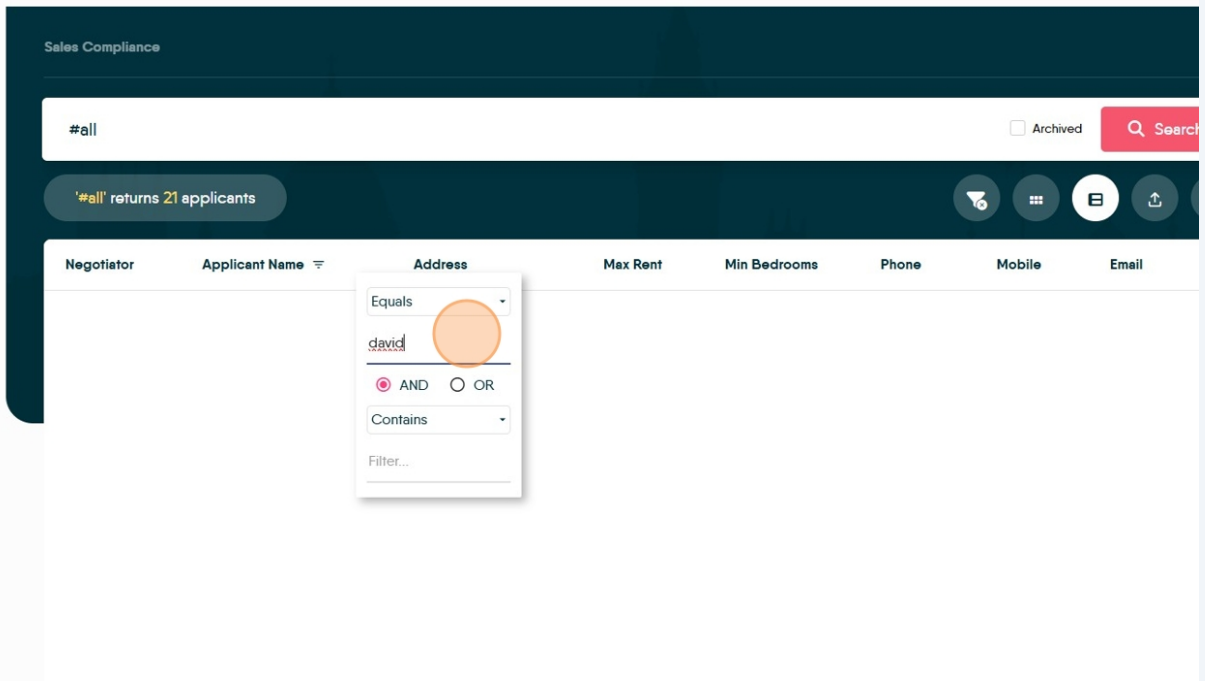
Negotiator	Applicant Name	Address
Training Dave	Mr Lettings Applicant	Darlington, County Durham, DL3 8LT, UK
Training Dave	Mr Lettings Applicant103	Darlington, County Durham, DL3 8LA, UK
Training Dave	Ms Lettings applicant130	, UK
Training Dave	lettings applicant133a	, UK
Training Dave	applicant135	, UK
Training Dave	Ms Lwttings Applicant136	7871 Pelaw Crescent, Chester le Street, County Durham, DH22HX, UK
Training Dave	Mr Lettings Applicant136a	759 Pelaw Crescent, Chester le Street, County Durham, DH2 2HX, UK
Training Dave	Sales applicant28	10 Kingsway, Darlington, County Durham, DL1 3EY, UK

14 You will then see a list of the options available. For example click **"Equals"** to find entries that match the search term you used.

The screenshot shows the IAM Property CRM interface with the same search criteria as the previous image. The dropdown menu is now open, showing a list of filter options: 'Contains', 'Not contains', 'Equals', 'Not equal', 'Starts with', and 'Ends with'. The 'Equals' option is highlighted with an orange circle. The table data is as follows:

Negotiator	Applicant Name	Address
Training Dave	Mr Lettings Applicant	Darlington, County Durham, DL3 8LT, UK
Training Dave	Mr Lettings Applicant103	Darlington, County Durham, DL3 8LA, UK
Training Dave	Ms Lettings applicant130	, UK
Training Dave	lettings applicant133a	, UK
Training Dave	applicant135	, UK
Training Dave	Ms Lwttings Applicant136	7871 Pelaw Crescent, Chester le Street, County Durham, DH22HX, UK
Training Dave	Mr Lettings Applicant136a	759 Pelaw Crescent, Chester le Street, County Durham, DH2 2HX, UK
Training Dave	Sales applicant28	10 Kingsway, Darlington, County Durham, DL1 3EY, UK
David-George Morgan	Miss Anne Blyton	The Big House Killin Island, Killin, DL1 0ZS, UK
Training Dave	Mrs Pamela Green	37 Barrett Road, Darlington, County Durham, DL3 8LA, UK
Training Dave	David Morgan	UK

15 Click the "Filter..." field. Enter your filter terms for that column.



Sales Compliance

#all Archived

'#all' returns 21 applicants

Negotiator	Applicant Name	Address	Max Rent	Min Bedrooms	Phone	Mobile	Email
------------	----------------	---------	----------	--------------	-------	--------	-------

Filter dropdown for Address:

- Equals
- david
- AND OR
- Contains
- Filter...

Sales Compliance

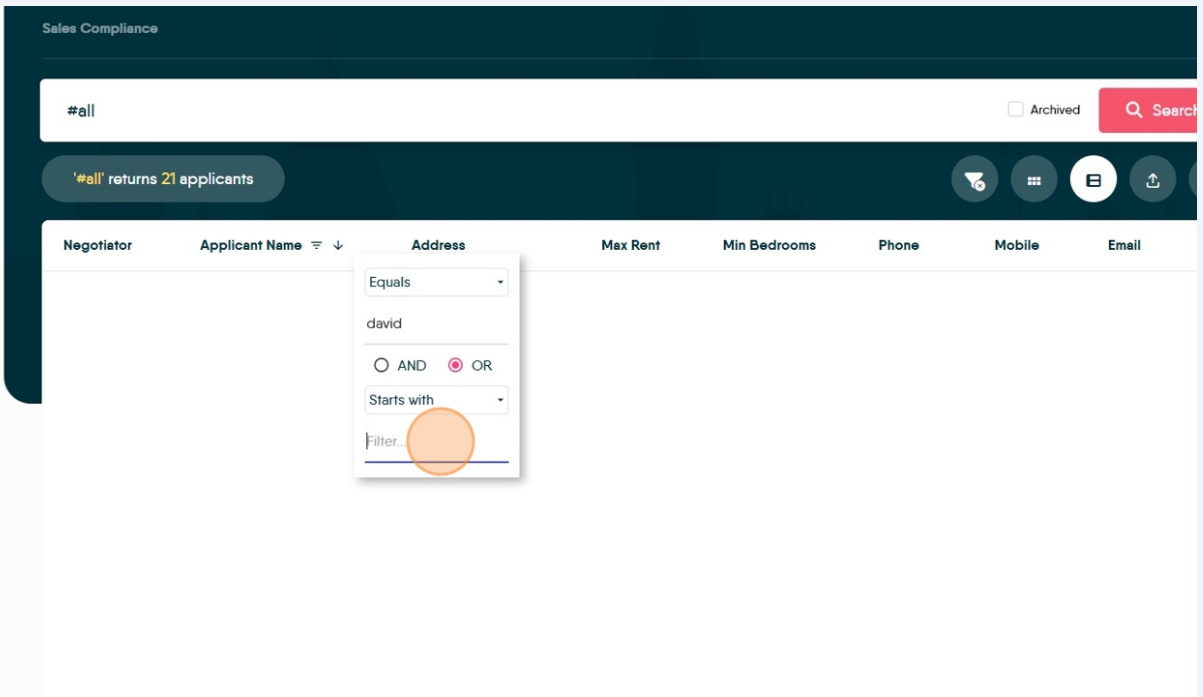
#all Archived

'#all' returns 21 applicants

Negotiator	Applicant Name	Address	Max Rent	Min Bedrooms	Phone	Mobile	Email
------------	----------------	---------	----------	--------------	-------	--------	-------

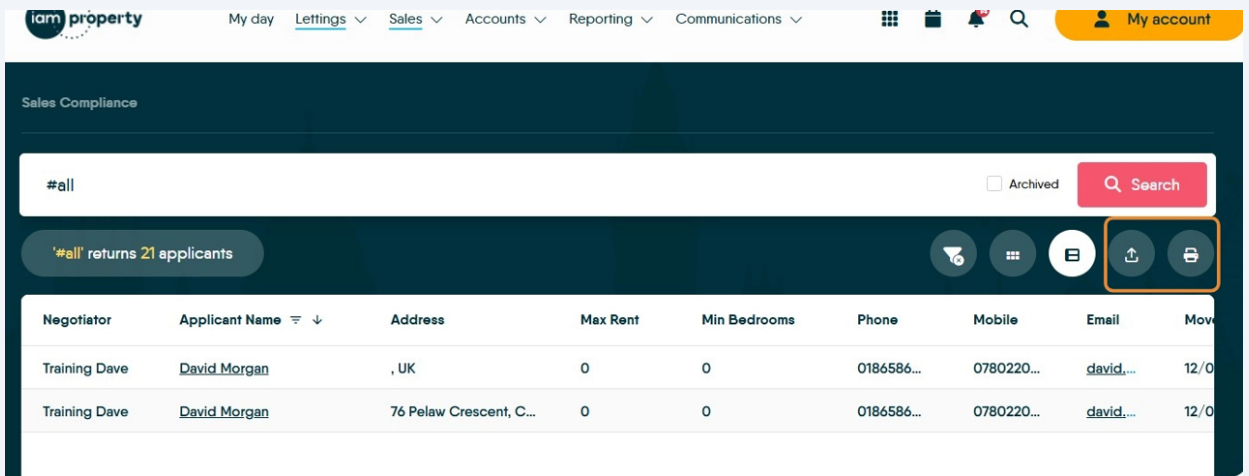
Filter dropdown for Address:

- Equals
- david
- AND OR
- Contains
- Contains
- Not contains
- Equals
- Not equal
- Starts with
- Ends with



16

Your search results will show on the screen. Selecting one of the highlighted icons will allow you to export the list to excel or PDF.



17

Click here to clear the filters you have created.

The screenshot shows a web application interface for property management. At the top, there are navigation links: iamproperty, CRM, movebutler, and iamsold. Below this is a main navigation bar with 'My day', 'Lettings', 'Sales', 'Accounts', 'Reporting', and 'Communications'. A search bar and a 'My account' button are also present. The main content area features a search bar with an 'Archived' checkbox and a 'Search' button. Below the search bar, a notification states 'returns 21 applicants'. A table of applicants is displayed with the following columns: Initiator, Applicant Name, Address, Max Rent, Min Bedrooms, Phone, Mobile, Email, and Move Date. The table contains several rows of data, including entries for 'Mr Sales Vendor30', 'Rightmove Tester', and 'Mr Luca Nugent'.

Initiator	Applicant Name	Address	Max Rent	Min Bedrooms	Phone	Mobile	Email	Move Date
ing Dave	Mr Sales Vendor30	4 Kingsway, Darlingto...	0	0	01325468...		zagg.d...	30
ing Dave	Rightmove Tester	1 Test Road ZX Land, ...	0	0	09999 99...	09999 99...	recipie...	01
ing Dave	Rightmove Tester	1 Test Road ZX Land, ...	0	0	09999 99...	09999 99...	recipie...	01
ing Dave	Rightmove Tester	1 Test Road ZX Land, ...	0	0	09999 99...	09999 99...	recipie...	01
d-Geor...	Mr Luca Nugent	12 Dunelm Walk, Darli...	800	3	07834956...	0783495...	zagg.d...	12
ing Dave	David Morgan	, UK	0	0	0186586...	0780220...	david...	12
ing Dave	David Morgan	76 Pelaw Crescent C...	0	0	0186586	0780220	david	12