

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, menu items for 'My day', 'Lettings', 'Sales', 'Accounts', 'Reporting', and 'Communications', and a 'My account' button. Below the navigation bar, a large heading reads 'Welcome back, Training'. Underneath, there are three buttons: '+ Add New Record', 'View property management', and 'Visit help centre'. A search bar is prominently displayed with the placeholder text 'Search all records'. Below the search bar, there are two main sections: 'Today's events' and 'My tasks'. The 'Today's events' section shows a table with columns for 'Time' and 'Name', containing one entry at 12:00 for 'Test test'. The 'My tasks' section shows a table with columns for 'Status', 'Name', 'Priority', 'Start date', and 'Due date', containing three entries, all with a status of 'Not Started' and a priority of 'High'.

Time	Name
12:00	Test test

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

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

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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

id 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

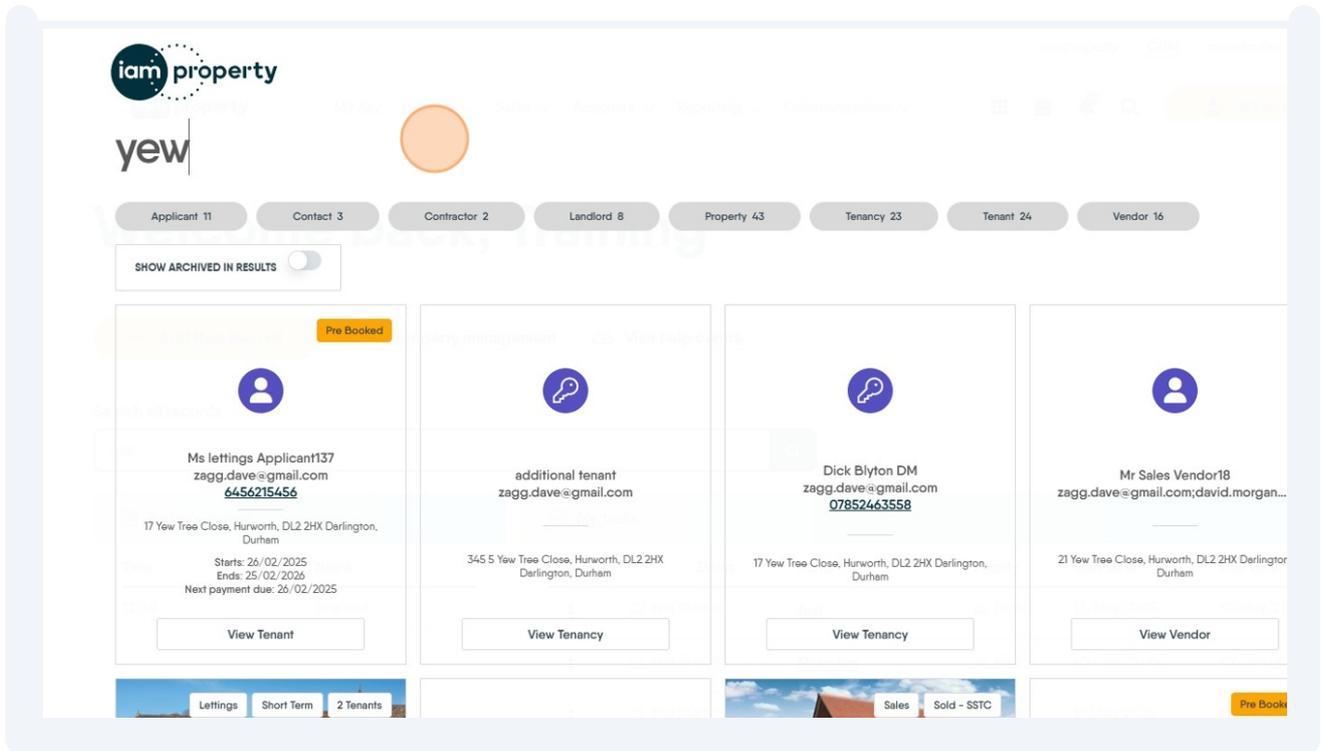
iamproperty CRM movebutler iamsold

Type your search and press enter...

Search filters: [Select] [Clear] [Add] [Remove]

Search results:

- Property 1: 1000 sqm
- Property 2: 1200 sqm
- Property 3: 800 sqm

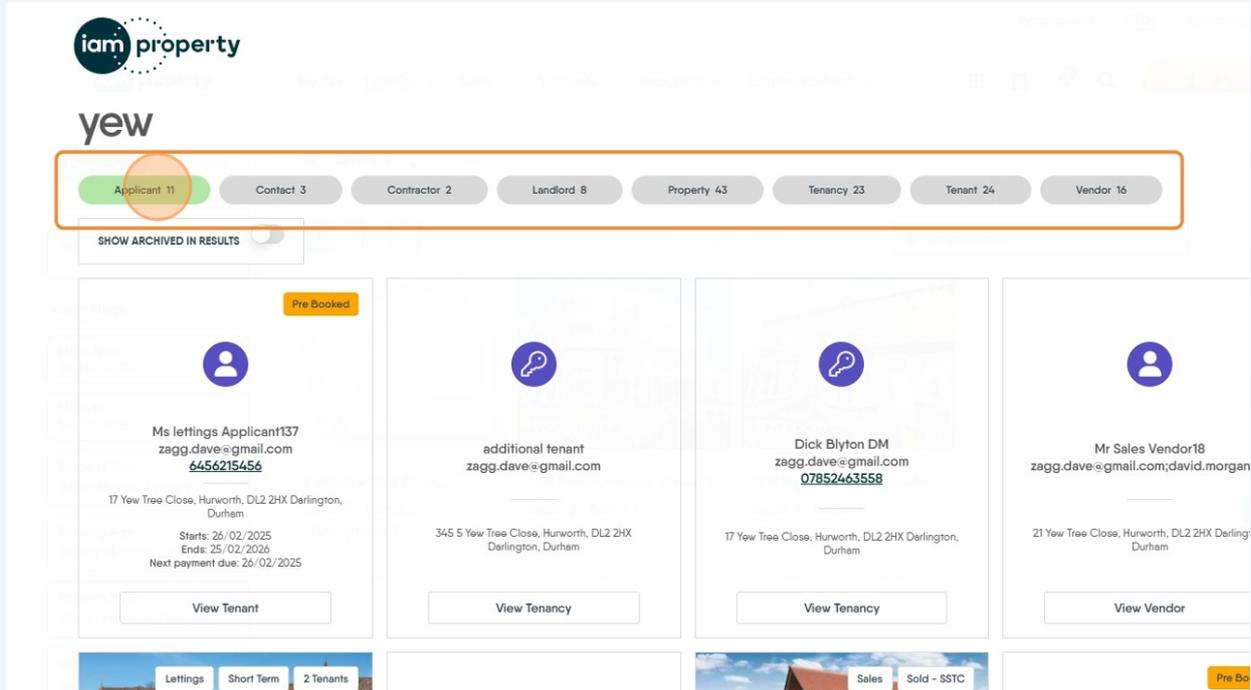


Tip! The search terms are a minimum of 3 characters, however, they can be anything e.g. Phone Number (or part of), postcode (or part of), street name etc.

Managing the Results

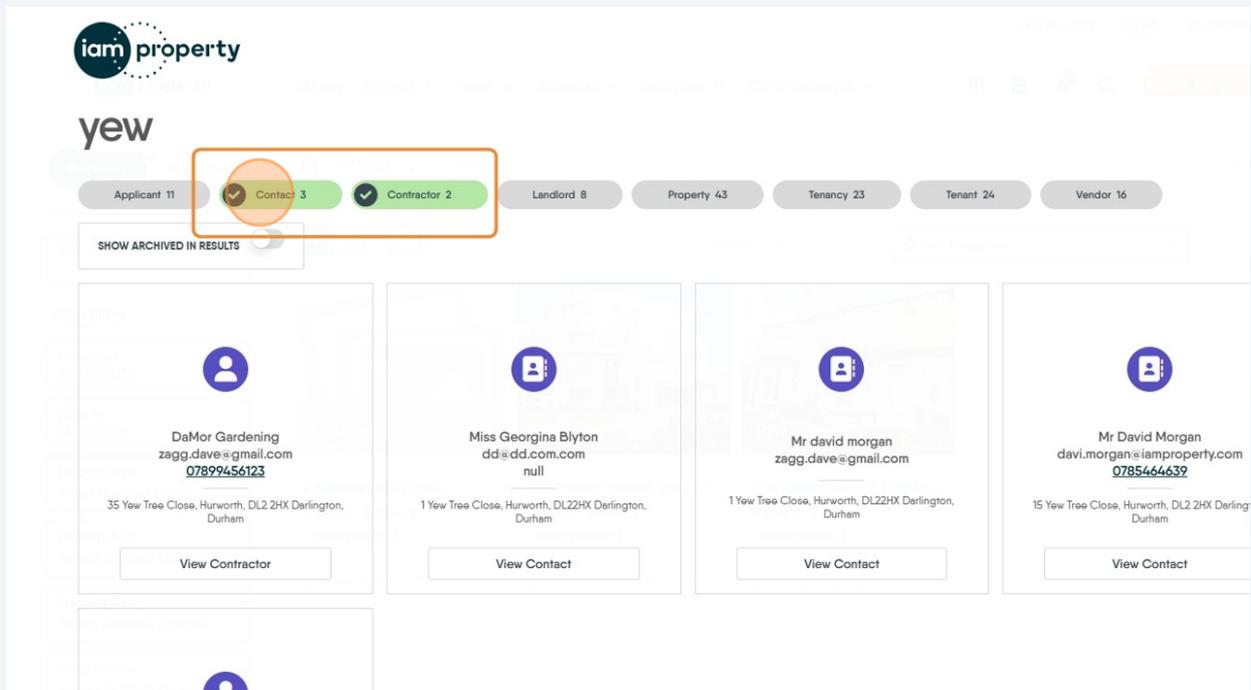
4

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

The screenshot shows the 'iam property yew' dashboard. At the top, there is a navigation bar with the 'iam property' logo and the 'yew' sub-brand. Below the navigation bar, there are several filter tabs: Applicant 11, Contact 3, Contractor 2, Landlord 8, Property 43, Tenancy 23, Tenant 24, and Vendor 16. A search bar is located to the right of these filters. A red box highlights a toggle switch labeled 'SHOW ARCHIVED IN RESULTS', which is currently turned off. Below the filters, there is a grid of property listings. Each listing card includes a profile picture, a name, an email address, a phone number, an address, and dates. The first listing is for 'Ms Lettings Applicant137' with email 'zagg.dave@gmail.com' and phone '6456215456'. The second listing is for 'additional tenant' with email 'zagg.dave@gmail.com'. The third listing is for 'Dick Blyton DM' with email 'zagg.dave@gmail.com' and phone '07852463558'. The fourth listing is for 'Mr Sales Vendor18' with email 'zagg.dave@gmail.com;david.morgan'. Each listing has a 'View Tenant' or 'View Tenancy' button. At the bottom of the dashboard, there are tabs for 'Lettings', 'Short Term', and '2 Tenants'.

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

The screenshot shows the 'iam property yew' dashboard with the 'SHOW ARCHIVED IN RESULTS' toggle switch turned on. The filter tabs are: Applicant 28, Contact 3, Contractor 2, Landlord 8, Property 44, Tenancy 48, Tenant 43, and Vendor 17. The search bar is visible. The grid of property listings now includes 'Archived' labels in the top right corner of each card. The first listing is for 'Lettings Applicant72' with email 'zagg.dave@gmail.com' and address '16 Yew Tree Close, Hurworth, DL2 2HX Darlington, Durham'. The second listing is for 'Ms Lettings Applicant137' with email 'zagg.dave@gmail.com' and phone '6456215456'. The third listing is for 'Mr Lettings Applicant131' with email 'zagg.dave@gmail.com' and address '162 Yew Tree Close, Hurworth, DL2 2HX Darlington, Durham'. The fourth listing is for 'additional tenant' with email 'zagg.dave@gmail.com' and address '345 5 Yew Tree Close, Hurworth, DL2 2HX Darlington, Durham'. Each listing has a 'View Tenant' or 'View Tenancy' button. At the bottom of the dashboard, there are tabs for 'Pre Booked' and 'Archived'.

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

The screenshot displays 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 navigation is a search bar with the text 'New Tree Close, Hurworth, Darlington'. A 'ARCHIVED IN RESULTS' toggle is visible on the left. The main content area is a grid of eight record cards. The top row contains four cards: 1. 'Ms lettings Applicant137' with email 'zagg.dave@gmail.com' and phone '6656215456', with a 'View Tenant' button. 2. 'additional tenant' with email 'zagg.dave@gmail.com', with a 'View Tenancy' button. 3. 'Dick Blyton DM' with email 'zagg.dave@gmail.com' and phone '07852463558', with a 'View Tenancy' button. 4. 'Mr Sales Vendor18' with email 'zagg.dave@gmail.com;david.morgan...', with a 'View Vendor' button circled in orange. The bottom row contains four cards: 1. A card with a house image, 'Lettings' tag, 'Short Term' tag, and '2 Tenants' tag, with address '217 Tree Close, Hurworth, DL2 2HX Darlington, Durham'. 2. A card with a person icon and the text 'bloggs'. 3. A card with a house image, 'Sales' tag, and 'Sold - SSTC' tag, with address '2 Yew Tree Close, Hurworth, DL2 2HX Darlington, Durham'. 4. 'Applicant141' with email 'Zagg.dave@gmail.com', with 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 "roperty" 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 contains the text "16 Yew Tree Close, Hurworth, Darlington". Below the search bar, there are four main record cards, each with a blue circular icon and a "View" button:

- Card 1:** "Ms lettings Applicant137", email "zagg.dave@gmail.com", phone "6456215456". Address: "Tree Close, Hurworth, DL2 2HX Darlington, Durham". Dates: "Starts: 26/02/2025", "Ends: 25/02/2026", "Next payment due: 26/02/2025". Button: "View Tenant".
- Card 2:** "additional tenant", email "zagg.dave@gmail.com". Address: "345 5 Yew Tree Close, Hurworth, DL2 2HX Darlington, Durham". Button: "View Tenancy".
- Card 3:** "Dick Blyton DM", email "zagg.dave@gmail.com", phone "07852463558". Address: "17 Yew Tree Close, Hurworth, DL2 2HX Darlington, Durham". Button: "View Tenancy".
- Card 4:** "Mr Sales Vendor18", email "zagg.dave@gmail.com,david.morgan...". Address: "21 Yew Tree Close, Hurworth, DL2 2HX Darlington, Durham". Button: "View Vendor".

At the bottom of the interface, there are tabs for "Lettings", "Short Term", "2 Tenants", "Sales", and "Sold - STC". A "Pre Booked" status indicator is visible in the bottom right corner.