

View All Landlord Records in Lettings



This guide provides a straightforward method for accessing comprehensive landlord records within the Lettings section of the CRM platform and exporting the list to a .csv format to be managed in excel or similar applications.

1

Log into iampropertyCRM. We are starting at the My Day screen for ease, this can be done from any screen in CRM.

The screenshot shows the 'My Day' screen in the iampropertyCRM. The navigation bar includes 'My day', 'Lettings', 'Sales', 'Accounts', 'Reporting', and 'Communications'. A search bar is present with the text 'Search all records'. Below the navigation, there are three buttons: '+ Add New Record', 'View property management', and 'Visit help centre'. The main content area is divided into two sections: 'Today's events' and 'My tasks'.

Time	Name
08:00	Jemmas 8-4.30
12:00	Test test

Status	Name	Priority	Start date	Due date
Not Started	<u>Call Audrey</u>	High	08/Oct/2025	08/Oct/2025
Not Started	<u>test</u>	High	24/Oct/2025	24/Oct/2025
Not Started	<u>Visit</u>	High	28/Oct/2025	28/Oct/2025
Not Started	<u>title</u>	High	29/Oct/2025	29/Oct/2025

2 Click "Lettings"

The screenshot shows the IAM Property CRM dashboard. The top navigation bar includes the IAM Property logo, a 'My day' dropdown, and a 'Lettings' dropdown menu which is highlighted with an orange circle. Other navigation items include Sales, Accounts, Reporting, and Communications. The main header area displays 'Welcome back, Training' and three action buttons: '+ Add New Record', 'View property management', and 'Visit help centre'. Below this is a search bar for all records. The dashboard is divided into two main sections: 'Today's events' and 'My tasks'. 'Today's events' shows two entries: 'Jemmas 8-4.30' at 08:00 and 'Test test' at 12:00. 'My tasks' is a table with columns for Status, Name, Priority, Start date, and Due date. It lists three tasks: 'Call Audrey' (Not Started, High priority, due 08/Oct/2025), 'test' (Not Started, High priority, due 24/Oct/2025), and 'Visit' (Not Started, High priority, due 28/Oct/2025).

Time	Name
08:00	Jemmas 8-4.30
12:00	Test test

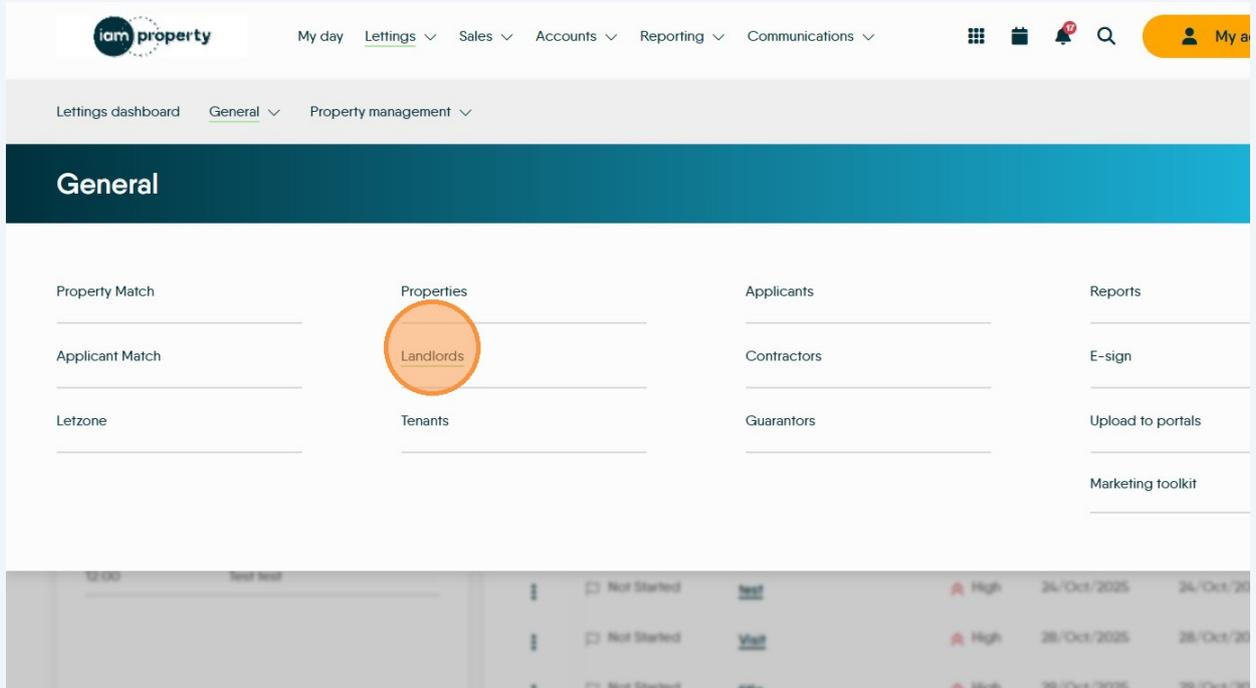
Status	Name	Priority	Start date	Due date
Not Started	Call Audrey	High	08/Oct/2025	08/Oct/2025
Not Started	test	High	24/Oct/2025	24/Oct/2025
Not Started	Visit	High	28/Oct/2025	28/Oct/2025

3 Click "General"

This screenshot is identical to the previous one, but the 'General' dropdown menu in the sub-navigation bar is highlighted with an orange circle. The sub-navigation bar also includes 'Lettings dashboard' and 'Property management'.

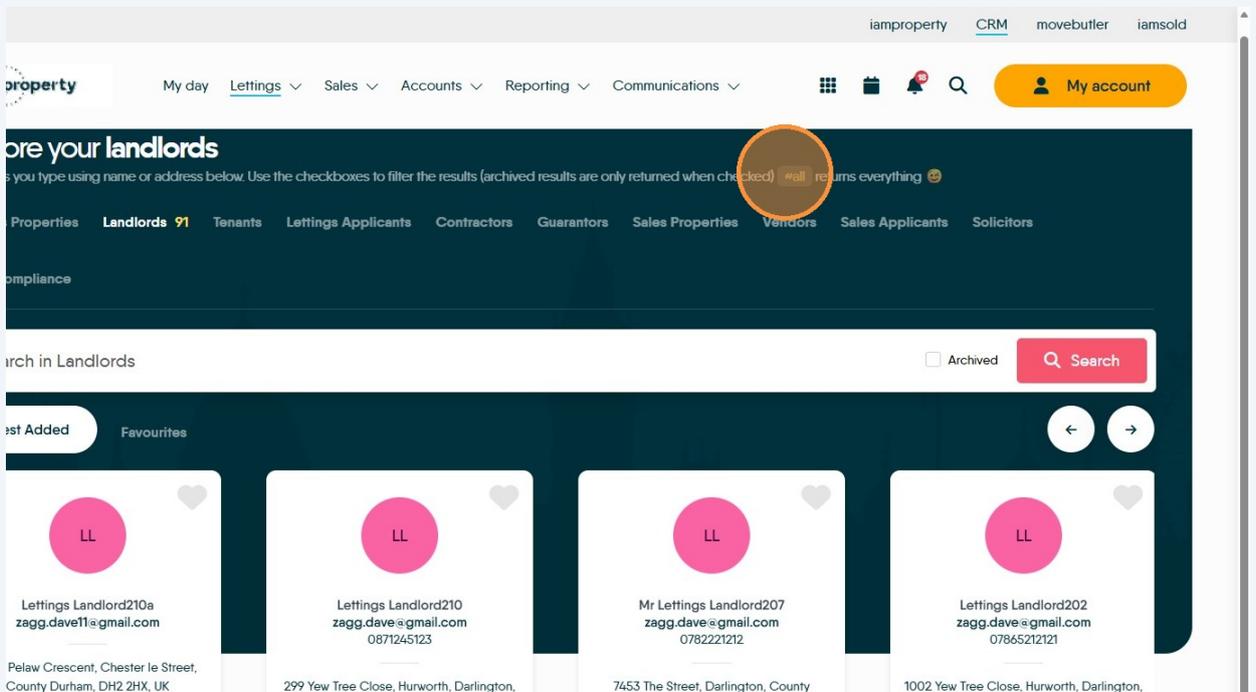
4

Click "**Landlords**" this will take you to the list of your landlord details, using the Properties, Tenants, Applicants, Contractors, Guarantors will take you to similar lists



5

Click "**#all**"



6

Click here to export the list of Landlords as a .CSV file. The file will be saved to your computers 'Downloads' folder. You will then have a list of all your Landlord records as they are shown on the screen.

The screenshot shows a web application interface for managing landlords. At the top, there is a navigation bar with tabs for Properties, Landlords (91), Tenants, Lettings Applicants, Contractors, Guarantors, Sales Properties, Vendors, Sales Applicants, and Solicitors. Below the navigation bar, there is a search bar and a filter section with an 'Archived' checkbox and a 'Search' button. A dropdown menu is open, showing 'Export to CSV' as an option. The main content area displays a table of landlord records with columns for Landlord Name, Landlord Address, Reference, Phone, and Mobile. The table contains six rows of data.

Landlord Name	Landlord Address	Reference	Phone	Mobile
ings_Landlord210a	7665 Pelaw Crescent, Chester le Street, County Durham, DH2 2HX, UK			
ings_Landlord210	299 Yew Tree Close, Hurworth, Darlington, Durham, DL22HX, UK		0871245123	0871
ettings_Landlord207	7453 The Street, Darlington, County Durham, DH2 2HX, UK		0782221212	0782
ings_Landlord202	1002 Yew Tree Close, Hurworth, Darlington, Durham, DL22HX, UK		07865212121	0786
ings_Landlord183	4523 Yew Tree Close, Hurworth, Darlington, Durham, DL22HX, UK		0785145165	0785
ettings_Landlord200	1000 Yew Tree Close, Hurworth, Darlington, Durham, DL22HX, UK		078552200000	0785