

Downloading a List of Current Property Stock



Learn how to export property listings into a formatted PDF document or excel file, directly from your CRM. This process is the same for both Sales and Lettings listings, it is also the same process to create a list of Vendors/Landlords/Tenants/Applicants etc.

This guide simplifies the process of generating property details for client presentations or offline record-keeping.

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

The screenshot shows the 'My Day' dashboard in the iam property CRM. At the top, there is a navigation bar with the iam property logo, 'My day' text, and dropdown menus for 'Lettings', 'Sales', 'Accounts', 'Reporting', and 'Communications'. To the right of these are icons for a grid, calendar, notifications, search, and user profile. The main heading reads 'Welcome back, Training'. Below this are three buttons: '+ Add New Record' (orange), 'View property management' (with a document icon), and 'Visit help centre' (with a question mark icon). A search bar labeled 'Search all records' is positioned below the buttons. The dashboard is divided into two main sections: 'Today's events' and 'My tasks'. 'Today's events' is a table with columns 'Time' and 'Name', showing two entries: '08:00 Jemmas 8-4.30' and '12:00 Test test'. 'My tasks' is a table with columns 'Status', 'Name', 'Priority', 'Start date', and 'Due date', showing two tasks: 'Call Audrey' and 'test', both with a status of 'Not Started' and a priority of 'High'.

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

2 Click **"Sales"** or **"Lettings"** the process is identical for both.

The screenshot shows the CRM dashboard with the 'Sales' menu item highlighted in an orange circle. The dashboard includes a search bar, 'Today's events' table, and 'My tasks' table.

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

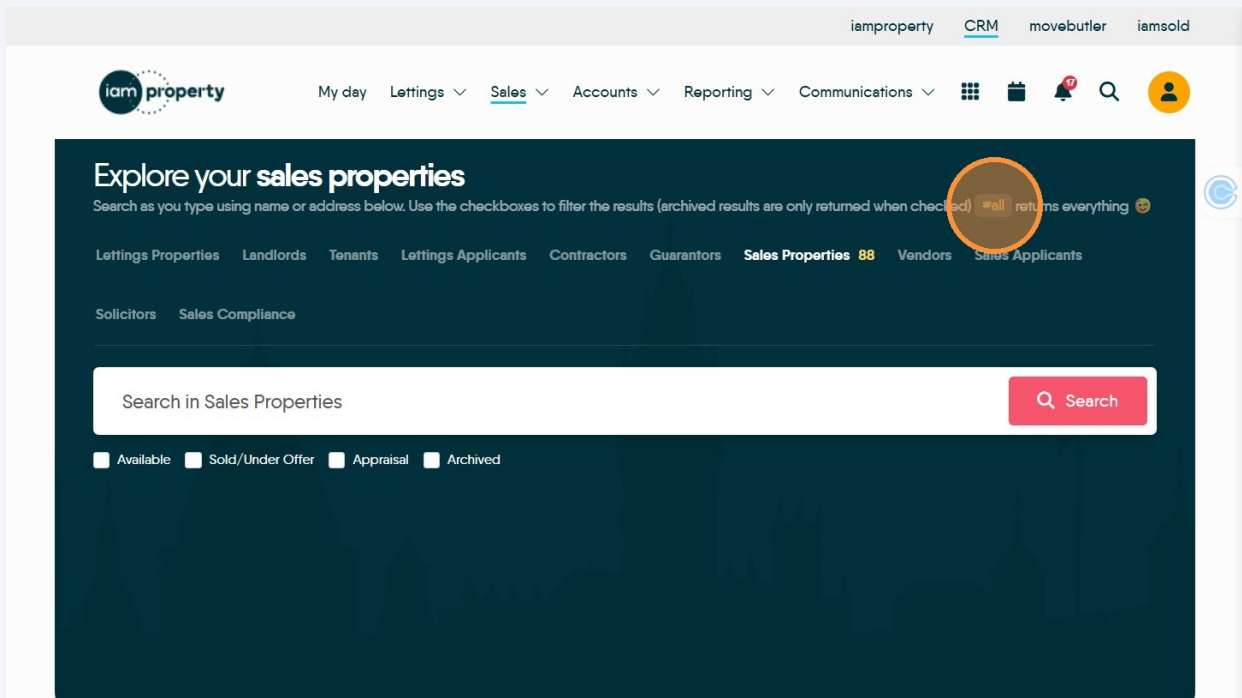
Status	Name	Priority	Start date	Due date
Not Started	<u>Call Audrey</u>	High	08/Oct/2025	08/Oct/2025
Not Started	<u>test</u>	High	24/Oct/2025	24/Oct/2025

3 Click **"Properties"** or any other of the options

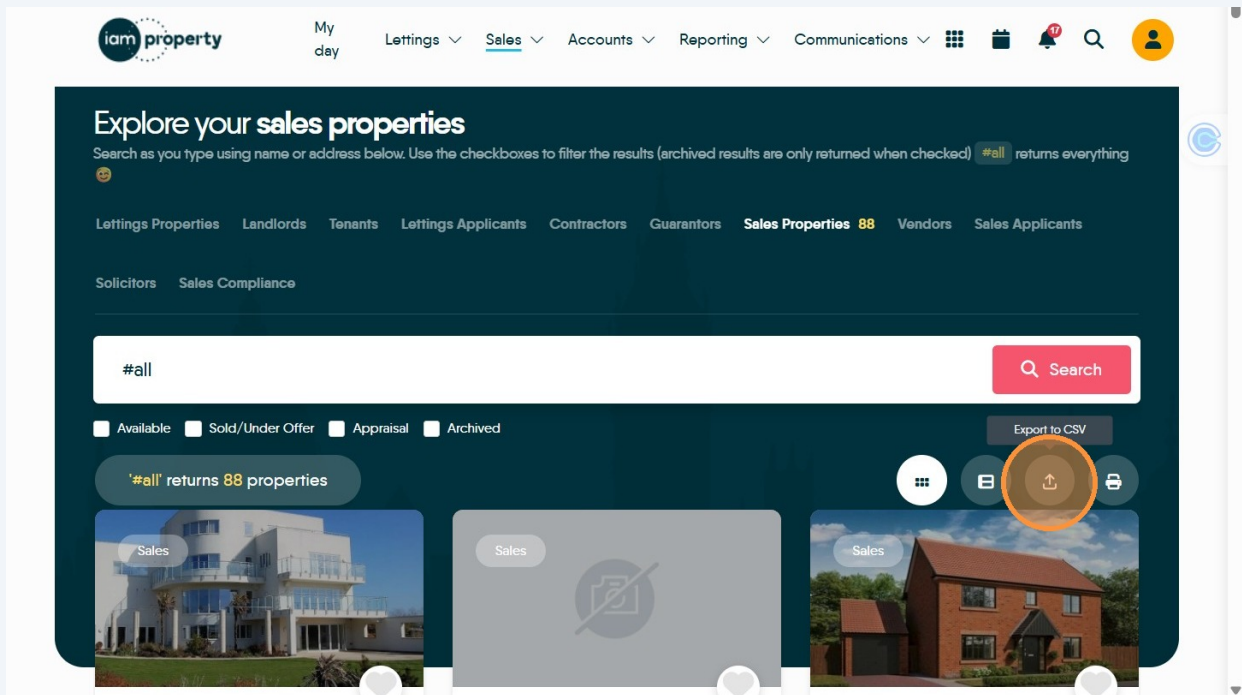
The screenshot shows the CRM 'Sales' dashboard with the 'Properties' option highlighted in an orange circle. The dashboard is organized into three columns: Sales Dashboard, Solicitors, and Sales Progression.

Sales Dashboard	Solicitors	Sales Progression
<u>Properties</u>	Property Match	Upload to portals
Vendors	Applicant Match	Sales Compliances
Applicants	Reports	E-sign
	Marketing toolkit	New

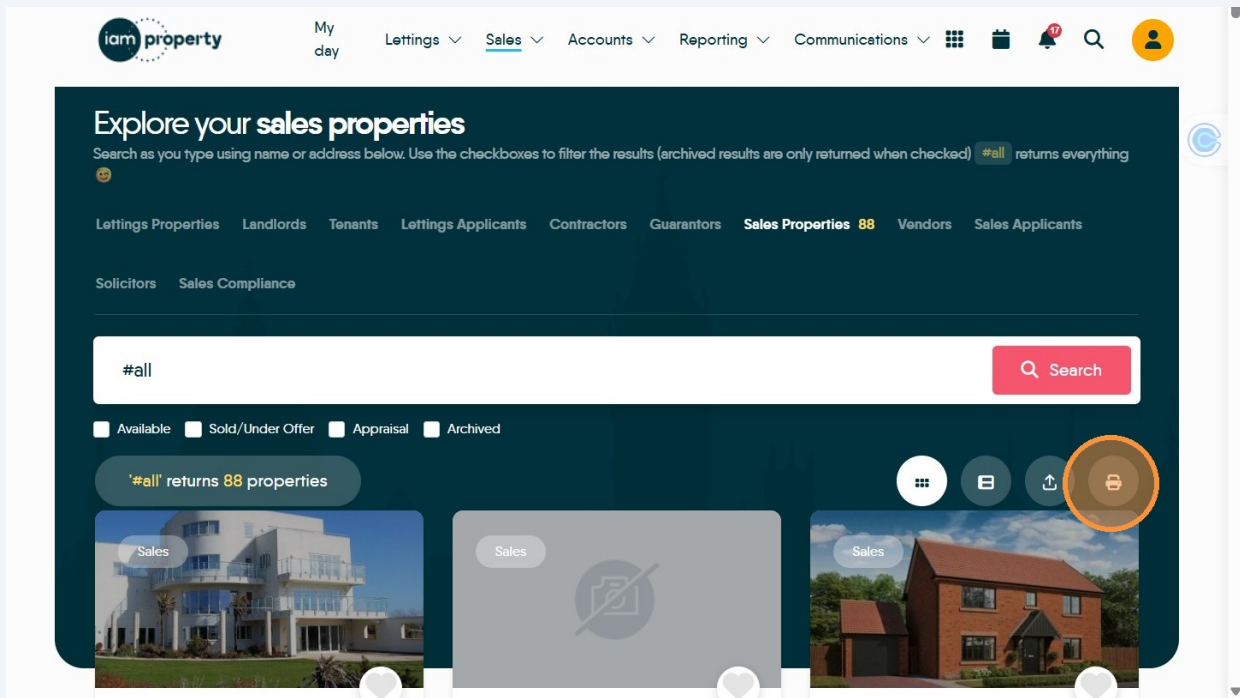
4 Click "#all" to show all records on the screen



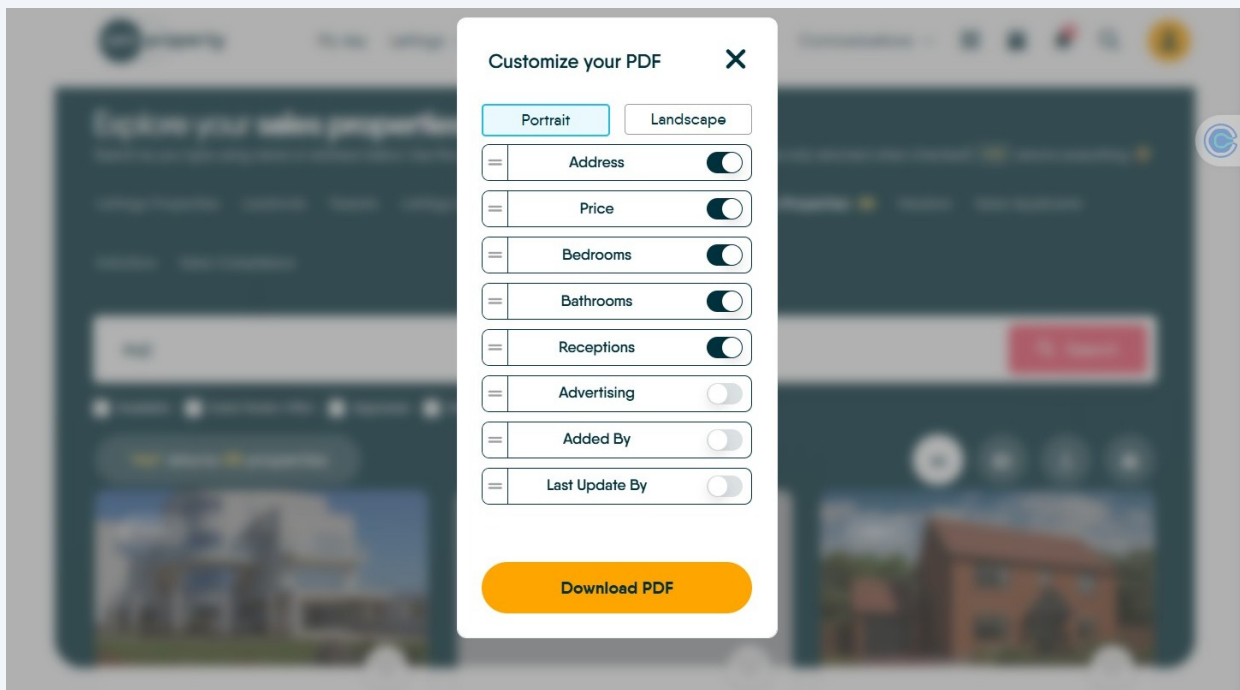
5 Click here to export the file to 'excel'. This will be saved to the 'Downloads' folder of your computer.



6 Click here to export and print a PDF document.



7 By using the toggles, the PDF export allows you to select the items required in the printout, as well as the page format. The list order can also be changed by dragging the options up and down the list.



8

Click "**Download PDF**" to save the document to your computers downloads folder.

