

Running the Calendar Day View Report



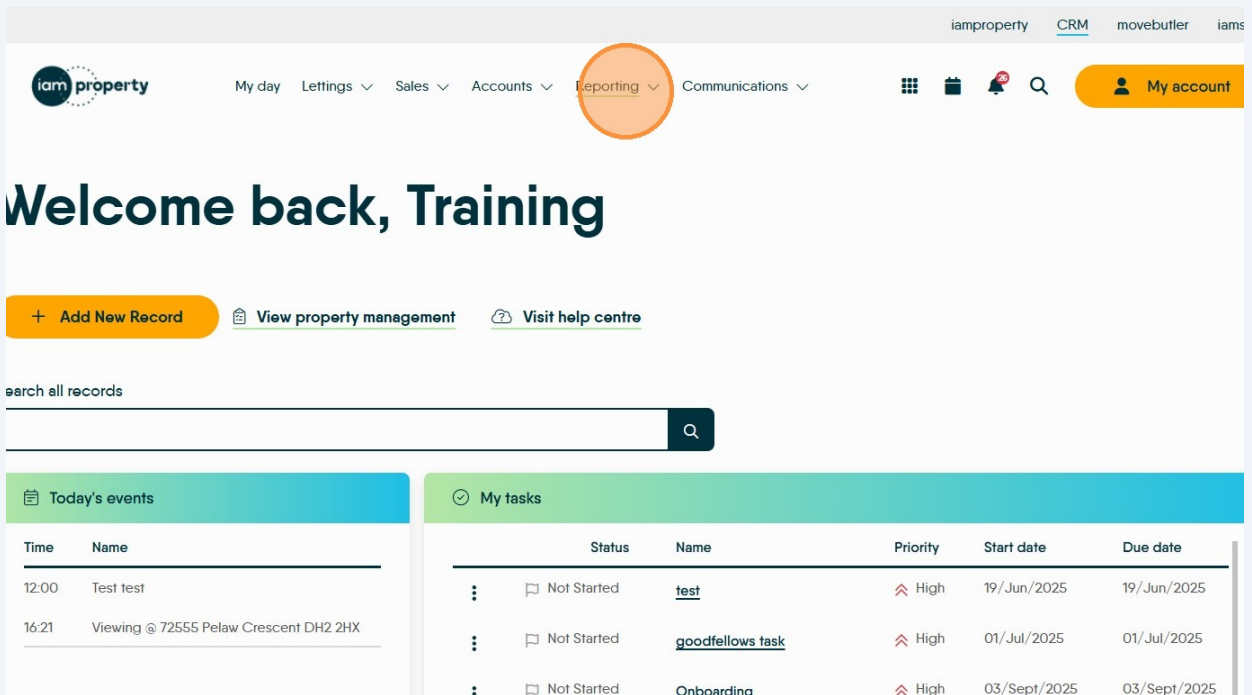
1 Navigate to <https://crm.iamproperty.com/MyDay> or any other screen on CRM

The screenshot shows the 'My Day' dashboard in the CRM system. 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 present with the placeholder text 'Search all records'. The main content area is divided into two panels: 'Today's events' and 'My tasks'. The 'Today's events' panel shows a list of events with columns for 'Time' and 'Name'. The 'My tasks' panel shows a table of tasks with columns for 'Status', 'Name', 'Priority', 'Start date', and 'Due date'.

Time	Name
12:00	Test test
16:21	Viewing @ 72555 Pelaw Crescent DH2 2HX

Status	Name	Priority	Start date	Due date
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
Not Started	<u>Onboarding</u>	High	03/Sept/2025	03/Sept/2025
Not Started	<u>Check</u>	High	24/Sept/2025	24/Sept/2025

2 Click "Reporting"

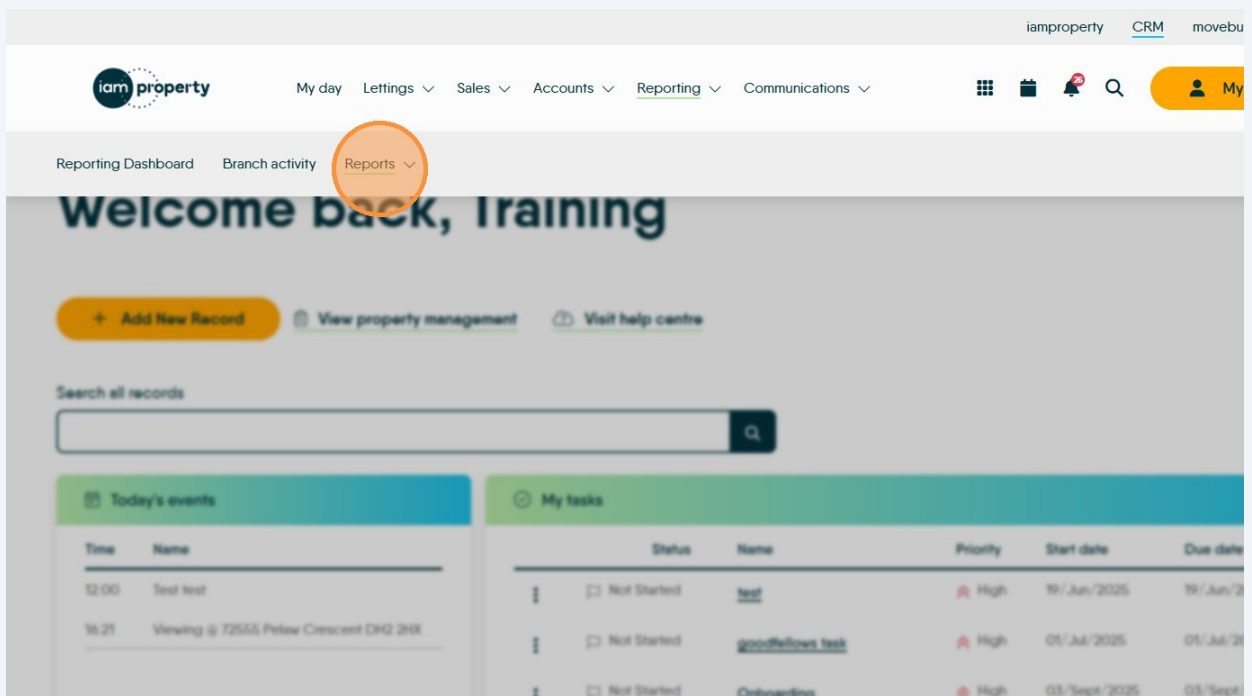


The screenshot shows the iamproperty CRM dashboard. The top navigation bar includes the iamproperty logo, a user menu with 'My account', and a main menu with 'My day', 'Lettings', 'Sales', 'Accounts', 'Reporting', and 'Communications'. The 'Reporting' menu item is circled in orange. Below the navigation bar, the dashboard displays a 'Welcome back, Training' message, a '+ Add New Record' button, and links for 'View property management' and 'Visit help centre'. A search bar is present, and the main content area is divided into two sections: 'Today's events' and 'My tasks'.

Time	Name
12:00	Test test
16:21	Viewing @ 72555 Pelaw Crescent DH2 2HX

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 "Reports"



The screenshot shows the iamproperty CRM dashboard with the 'Reporting' menu expanded. The 'Reports' sub-menu item is circled in orange. The dashboard content is dimmed, showing the same 'Welcome back, Training' message and navigation elements as in the previous screenshot.

Time	Name
12:00	Test test
16:21	Viewing @ 72555 Pelaw Crescent DH2 2HX

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

4 Click "General"

iamproperty CRM movebu

My day Lettings Sales Accounts Reporting Communications

Reporting Dashboard Branch activity Reports

Reports

General Lettings Sales

Accounts Batch Reports

Time	Name	Status	Name	Priority	Start date	Due date
12:00	Test test	Not Started	test	High	19/Jun/2025	19/Jun/2
16:21	Viewing @ 72555 Pelaw Crescent DHQ 2H3	Not Started	goodfellows test	High	01/Jul/2025	01/Jul/2
		Not Started	Onboarding	High	03/Sept/2025	03/Sept

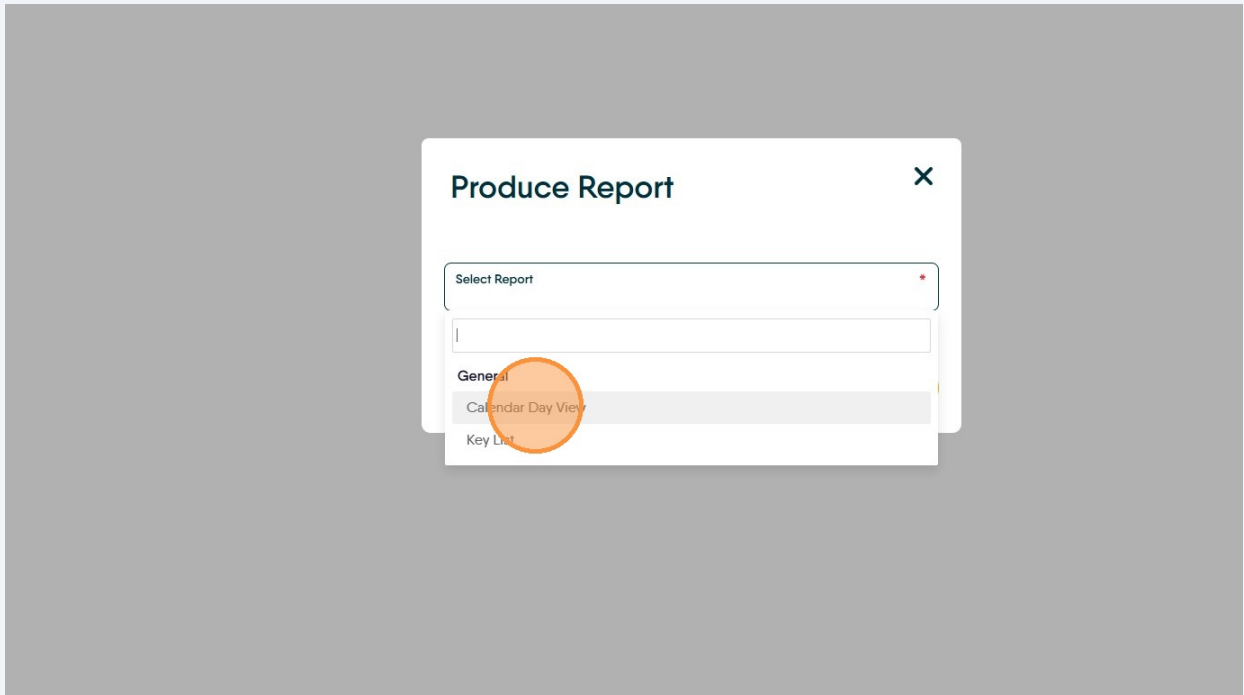
5 Click here.

Produce Report

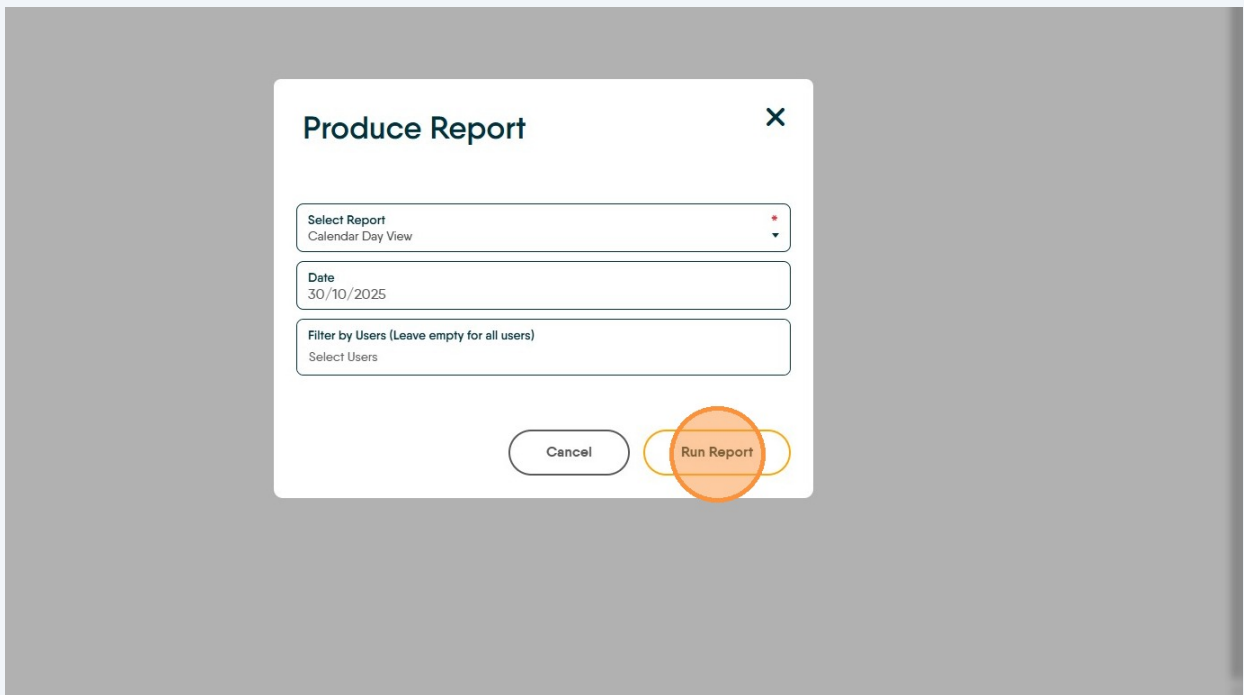
Select Report

Cancel Run Report

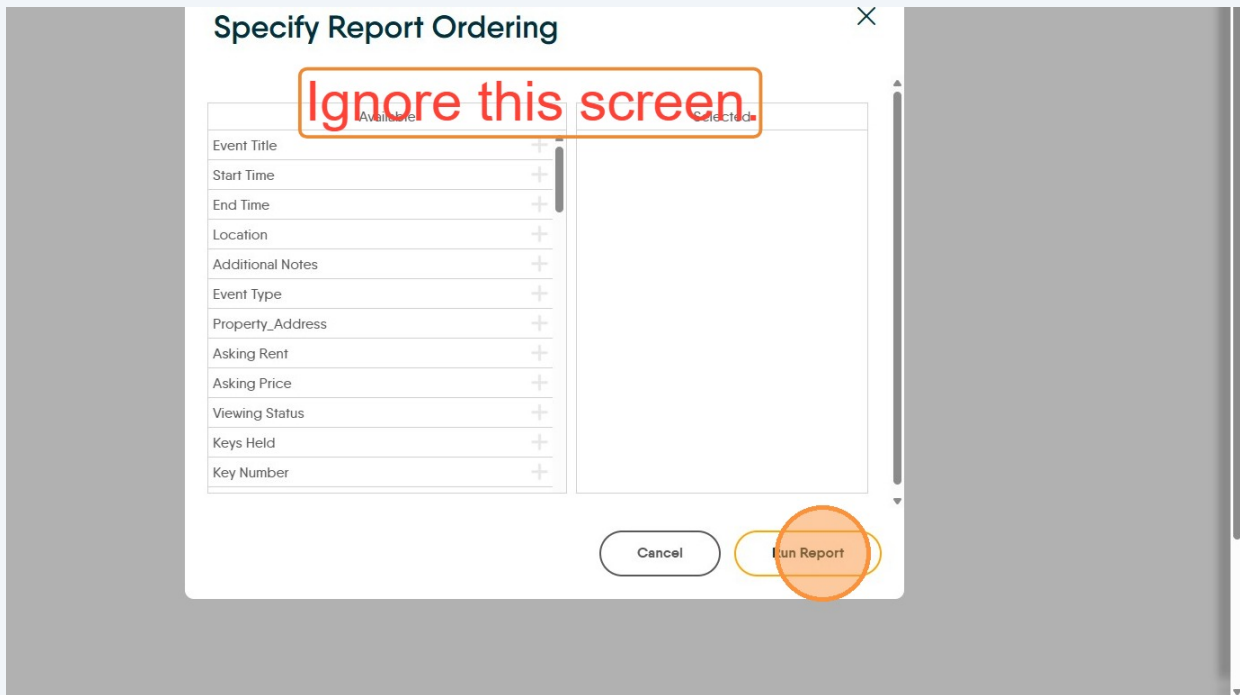
6 Click "Calendar Day View" you may need to scroll or search for this report



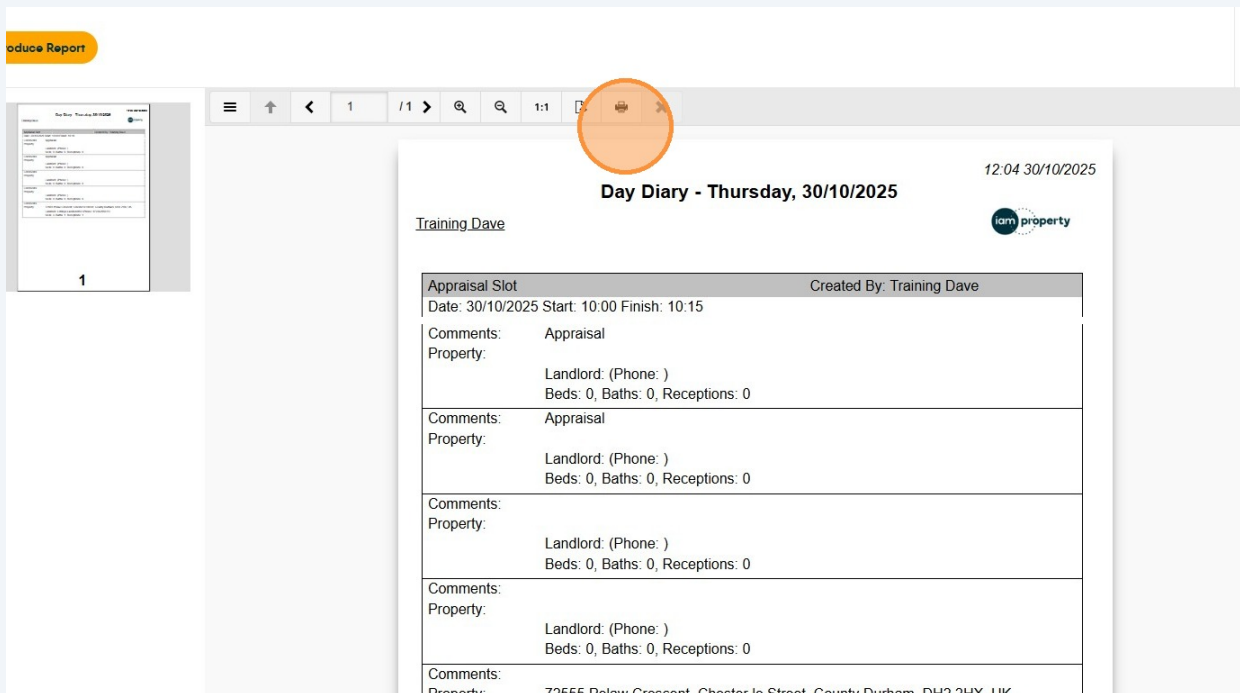
7 Set the date you wish to run the report for and if required select the employee the calendar is being printed for. Click "Run Report"



8 Ignore this screen. Click "Run Report"



9 To print the diary click the 'print' icon.



10

To export the diary to PDF/Word etc click the export icon and select the file type from the menu. The file will be saved on your computer in your 'Downloads' folder.

Produce Report

Appraisal Slot	Created By: Training Dave
Date: 30/10/2025 Start: 10:00 Finish: 10:15	
Comments: Appraisal	Property: Landlord: (Phone:) Beds: 0, Baths: 0, Receptions: 0
Comments: Appraisal	Property: Landlord: (Phone:) Beds: 0, Baths: 0, Receptions: 0
Comments:	Property: Landlord: (Phone:) Beds: 0, Baths: 0, Receptions: 0
Comments:	Property: Landlord: (Phone:) Beds: 0, Baths: 0, Receptions: 0
Comments:	Property: 72555 Pelaw Crescent Chester le Street County Durham DH2 2HX UK