

Using the 'Explore your...' Feature in CRM



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 top 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 bar, 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'.

Today's events

Time	Name
12:00	Test test

My tasks

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"

The screenshot shows the 'iamproperty' CRM interface. The top 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 bar, 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'.

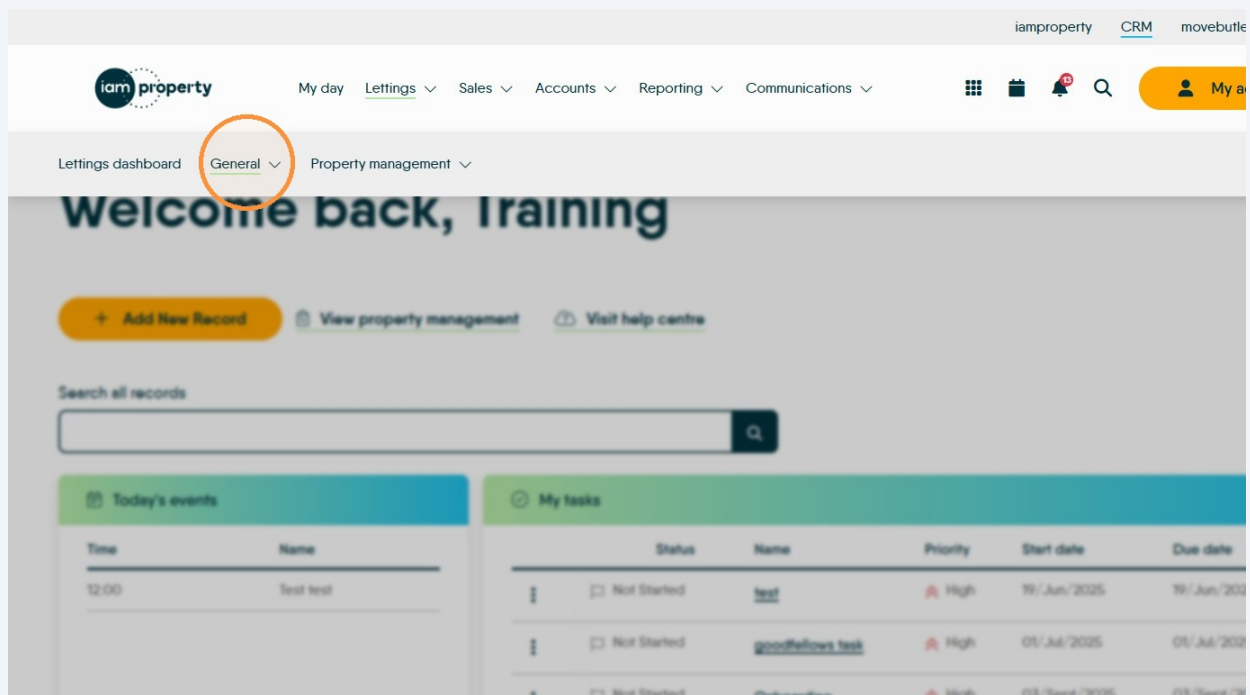
Today's events

Time	Name
12:00	Test test

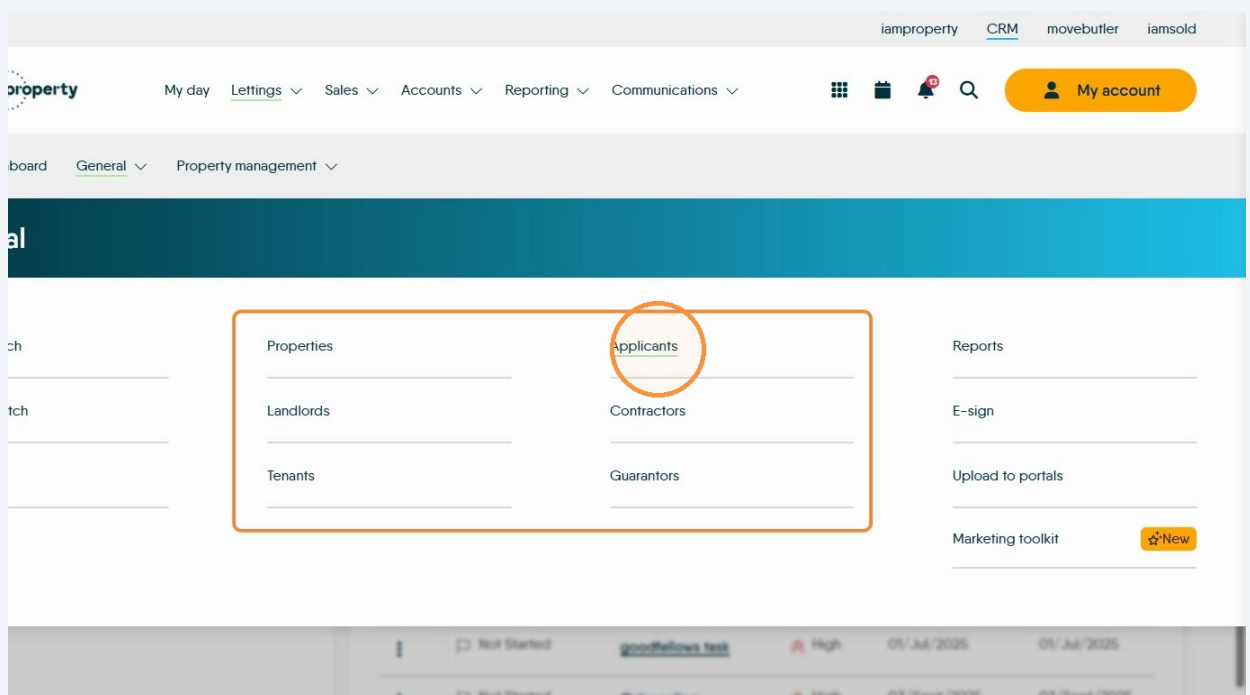
My tasks

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

4 Click "General"

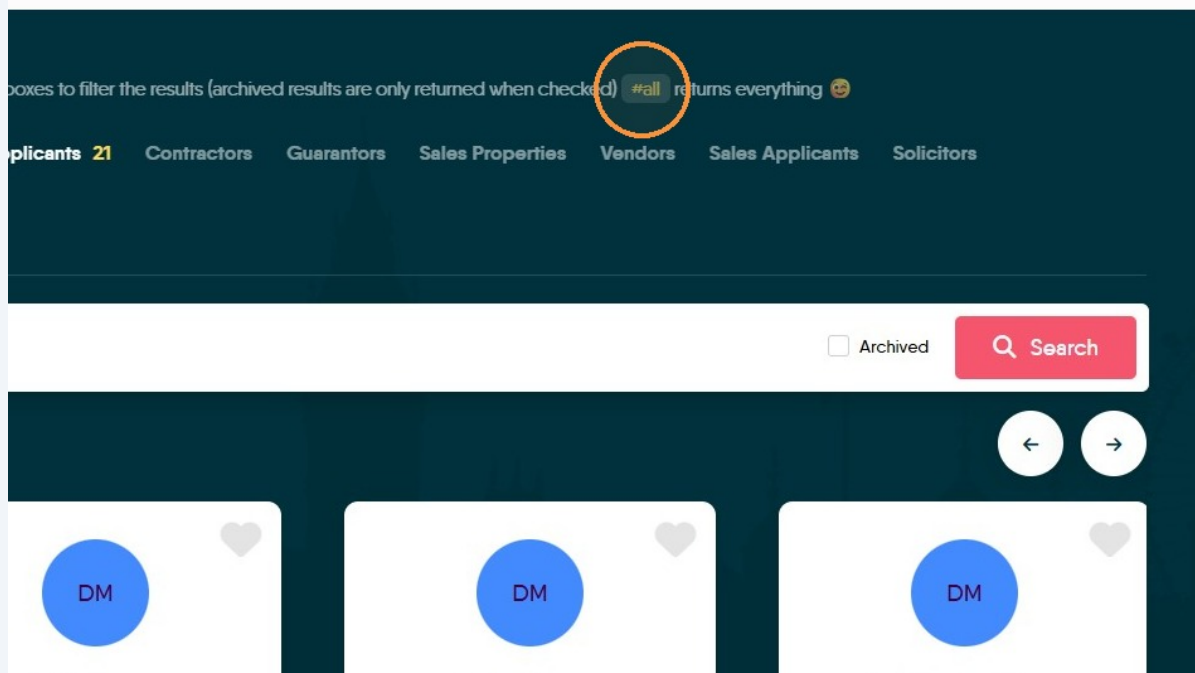


5 Click "Applicants" or any option in the highlighted area.



6

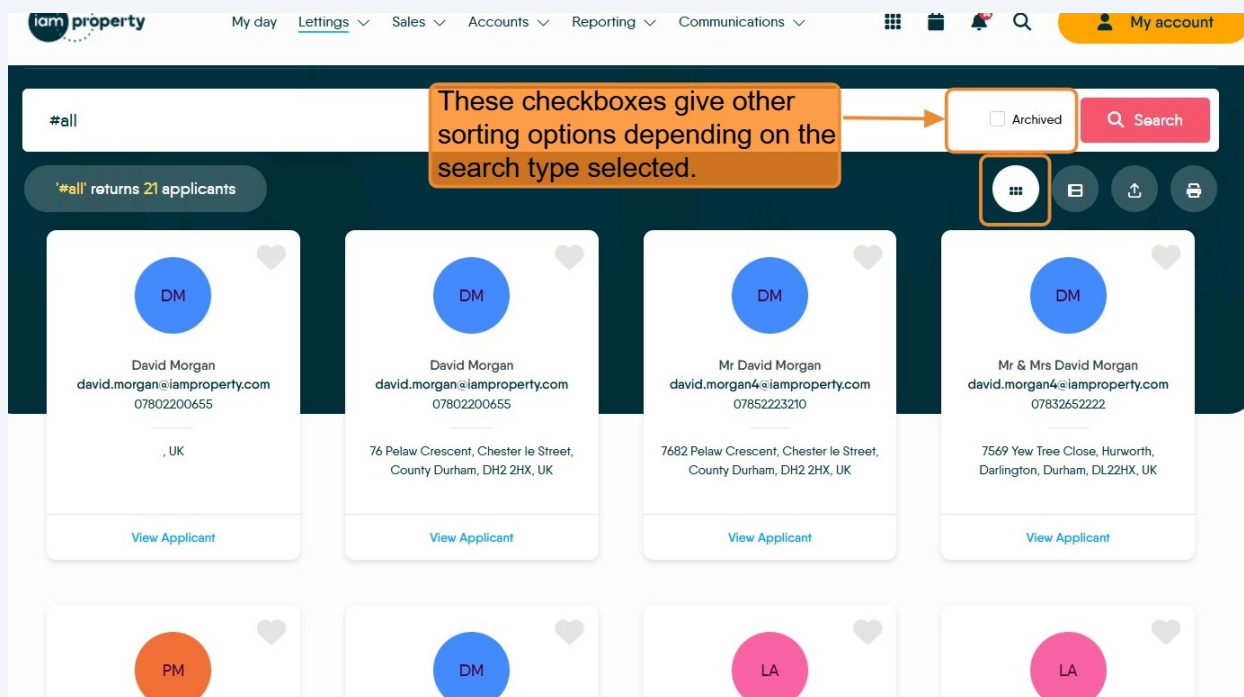
Initially this will show the 4 most recently created records. To view all records in the list. Click "**#all**"



7

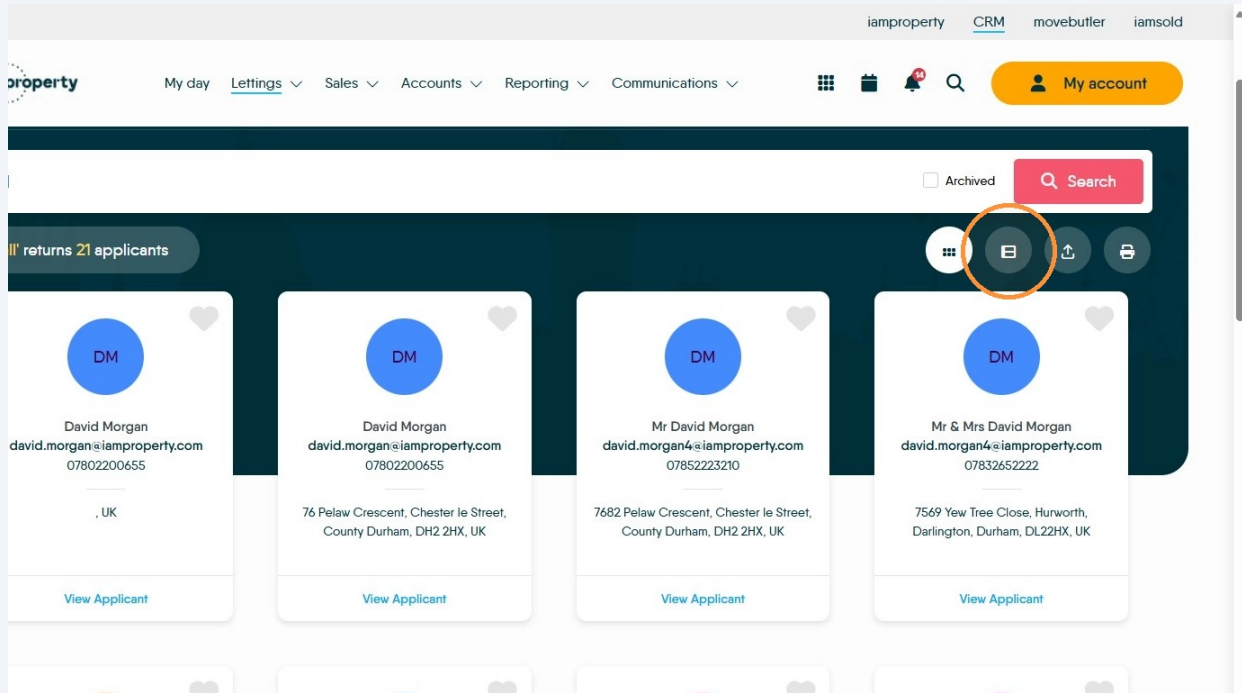
There are 2 views a **'tile'** view, which is the standard view and can be re selected using the highlighted icon and a **'list'** view.

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.



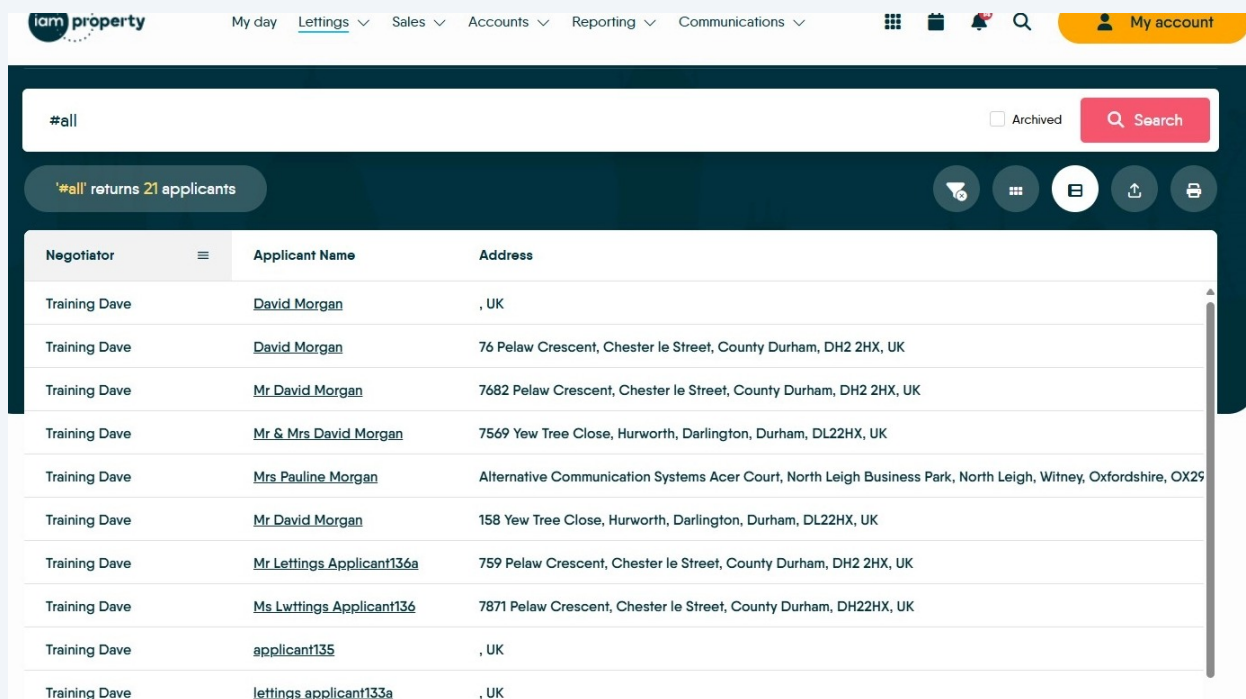
8

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.



iam property My day Lettings Sales Accounts Reporting Communications My account

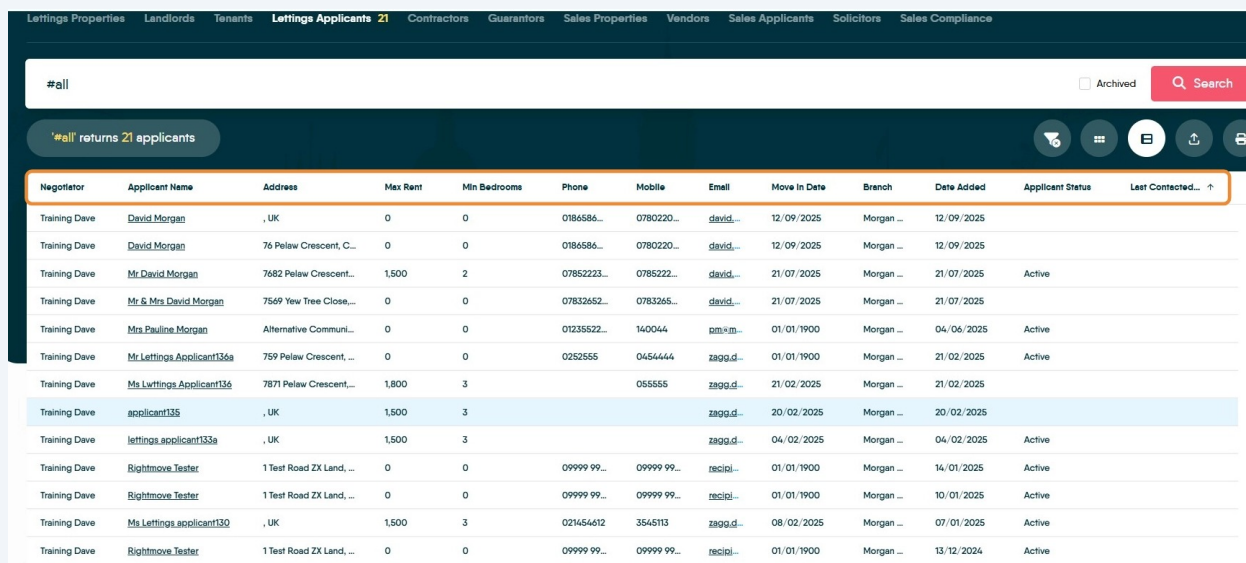
#all Archived Search

'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 Lettings Applicant136	7871 Pelaw Crescent, Chester le Street, County Durham, DH22HX, UK
Training Dave	applicant135	, UK
Training Dave	lettings.applicant133a	, UK

10 Most 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.



Lettings Properties Landlords Tenants Lettings Applicants 21 Contractors Guarantors Sales Properties Vendors Sales Applicants Solicitors Sales Compliance

#all Archived Search

'all' returns 21 applicants

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...	1,500	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	pm...	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...	1,800	3		055555	zagg.d...	21/02/2025	Morgan ...	21/02/2025		
Training Dave	applicant135	, UK	1,500	3			zagg.d...	20/02/2025	Morgan ...	20/02/2025		
Training Dave	lettings.applicant133a	, UK	1,500	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...	resci...	01/01/1900	Morgan ...	14/01/2025	Active	
Training Dave	Rightmove Tester	1 Test Road ZX Land, ...	0	0	09999 99...	09999 99...	resci...	01/01/1900	Morgan ...	10/01/2025	Active	
Training Dave	Ms Lettings applicant130	, UK	1,500	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...	resci...	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 iamproperty CRM interface. At the top, there's a navigation bar with 'My day', 'Lettings', 'Sales', 'Accounts', 'Reporting', and 'Communications'. A search bar contains '#all'. Below the search bar, a status bar indicates "'#all' returns 21 applicants". The main table has three columns: 'Negotiator', 'Applicant Name', and 'Address'. The 'Applicant Name' column header is circled in orange. The table lists several applicants, including David-George Morgan, Training Dave, and Mr. Luca Nugent.

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 0ZS, 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 iamproperty CRM interface with the same navigation bar. The search bar still contains '#all'. The status bar indicates "'#all' returns 21 applicants". The table now shows a filtered list of applicants. The 'Applicant Name' column header has a 3-line menu icon circled in orange. The table lists applicants like 'Mr Lettings Applicant', 'Mr Lettings Applicant103', and 'Ms Lettings applicant130'.

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

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

#all

'#all' returns 21 applicants

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

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.

returns 21 applicants

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

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

Sales Compliance

#all Archived Search

'#all' returns 21 applicants

Negotiator	Applicant Name	Address	Max Rent	Min Bedrooms	Phone	Mobile	Email
Equals david ☒ AND ☐ OR Contains Filter...							

Sales Compliance

#all Archived Search

'#all' returns 21 applicants

Negotiator	Applicant Name	Address	Max Rent	Min Bedrooms	Phone	Mobile	Email
Equals david ☒ AND ☐ OR Contains Filter...							

'#all' returns 21 applicants

Negotiator

Applicant Name

Address

Max Rent

Min Bedrooms

Phone

Equals

david

☐ AND ☒ OR

Contains

Filter...

Sales Compliance

#all

☐ Archived

Search

'#all' returns 21 applicants

Negotiator

Applicant Name

Address

Max Rent

Min Bedrooms

Phone

Mobile

Email

Equals

david

☐ AND ☒ OR

Contains

Contains

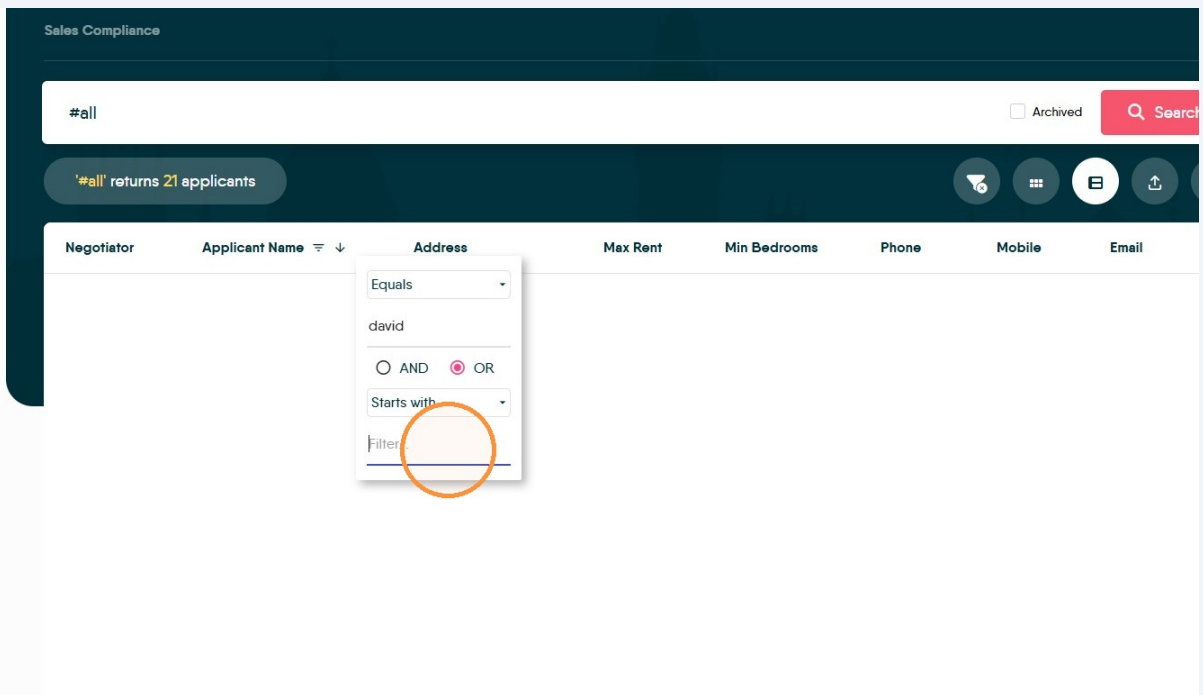
Not contains

Equals

Not equal

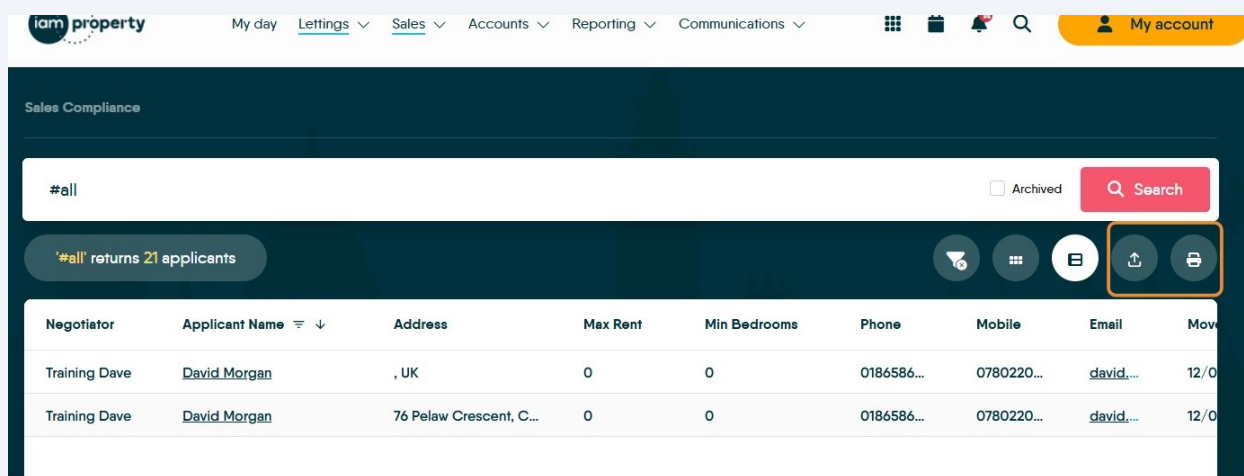
Starts with

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.

iamproperty CRM movebutler iamsold

property My day Lettings Sales Accounts Reporting Communications

compliance

Archived Search

returns 21 applicants

Filter icon

Initiator	Applicant Name ↓	Address	Max Rent	Min Bedrooms	Phone	Mobile	Email	Mov
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