

CRM Navigation (Odoo v19)

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Audience: OEH Staff

Purpose: Provide a standardized understanding of how to navigate and use the CRM interface.

Last Updated: December 2025

1. CRM Views Overview

Odoo CRM provides four primary views. Each displays information differently and is used for different purposes.

1.1 Kanban View (Columns)

- Default landing view.
- Columns represent stages in the claim lifecycle.
- Each card represents an individual claim.
- Used for overall workflow visibility and high-level status tracking.

The screenshot shows the Pipeline workspace with a list view of claims. The pipeline is organized into several sections: New, Property search, Property Data Sheet, Sent For Approval, Updates, and Approved. Each section displays a list of claim cards, each containing basic information such as the claim number, location, contact name, and a small preview of the claim details.

1.2 List View

- Displays claims in table format.
- Useful for sorting, filtering, and performing bulk actions.
- Ideal for reporting, audits, or reviewing multiple records quickly.

Opportunity	Contact Name	Email	Salesperson	Expected Rev...	Stage	Action Buttons
#25 Camargo - Marietta, GA 30064 (F) Nov 14 TWO PROPERTIES	Kimberly G	"Corey Roehl" <coreyroehl@overeasyhospitality.net>	Frances Banegas	\$ 0.00	Closed	
#8 Prospect, KY Lison (Corey) Oct 15 - Need funds	Michael Lopez	Michael.Lopez@alesolutions.com	Corey Roehl	\$ 0.00	Moved In / Extensions	
#2 Carnes - Florence, SC 29505 (Ana) Friday move in	Kelli Mcvilliams	Kelli.Mcvilliams@alesolutions.com	Corey Roehl	\$ 0.00	Moved In / Extensions	
#1 Horwitz-Las Vegas, NV 89134 (Ana) Oct 23 Thursday!!! need to check in Friday	Lindsay Loza	Lindsay.Loza@alesolutions.com	Corey Roehl	\$ 0.00	Moved In / Extensions	
#36 Fulton - Graham, NC 27253 - Dec 3	Kimberly Grena	"Corey Roehl" <coreyroehl@overeasyhospitality.net>		\$ 0.00	Property search	
#29 Ho/Cong-Le - Peoria, AZ 85381 (F) 10/20	Katie Plaza	"Corey Roehl" <coreyroehl@overeasyhospitality.net>	Frances Banegas	\$ 0.00	Closed	
#34 Marinette WI (F) Nov 26	Victoria Schmit	"Corey Roehl" <coreyroehl@overeasyhospitality.net>	Frances Banegas	\$ 0.00	Closed	
#28 Sewell - Covington, LA 70435 (F) Nov 18 - to far	Kimberly G	"Corey Roehl" <coreyroehl@overeasyhospitality.net>	Frances Banegas	\$ 0.00	Closed	
#26 Woody - Washington, DC 20017 (F) Nov 18	Corey Roehl	"Corey Roehl" <coreyroehl@overeasyhospitality.net>	Frances Banegas	\$ 0.00	Closed	
#37 Belgard - Keizer, OR 97303 - Dec 4	Corey Roehl	"Corey Roehl" <coreyroehl@overeasyhospitality.net>		\$ 0.00	Property search	
testing	Ana Test Contact	"Corey Roehl" <coreyroehl@overeasyhospitality.net>		\$ 0.00	Sent For Approval	
# 35 Loftis Family- Sherman, TX--- Dec 2 Tuesday Prop 2 needs Showing	Evan Ehrhardt	"Corey Roehl" <coreyroehl@overeasyhospitality.net>		\$ 0.00	Lease Executed	
#33 Johnson/Lopez - Jersey City, NJ 07304 (F) Nov 26	Kimberly G	"Corey Roehl" <coreyroehl@overeasyhospitality.net>	Frances Banegas	\$ 0.00	Closed	
ANA'S TEST CLAIM FOR LOOM	Ana Cortes	"Ana Monserrat" <anam@overeasyhospitality.net>	Ana Cortes	\$ 0.00	Property search	
#32 Sterling - Owings Mills, MD 21117 (F) Nov 24	Kimberly G	"Corey Roehl" <coreyroehl@overeasyhospitality.net>		\$ 0.00	Closed	
#31 Kansas City KS (F) Nov 24	Victoria Schmit	"Corey Roehl" <coreyroehl@overeasyhospitality.net>		\$ 0.00	Closed	

1.3 Form View (Record View)

- Opens when selecting a claim card.
- Used to edit claim details, update fields, complete VA steps, and review all related information.
- Primary workspace for record updates.

The screenshot shows the CRM interface with a pipeline entry for 'ANA'S TEST CLAIM FOR LOOM'. The record details include Expected Revenue (\$0.00) at 100.00%, Case Number (0), Agent Referral (Test Name), Guest Name (Test Name), Guest Phone Number (7144560091), Guest Email (test@test.com), Location (California DR Residence), Zip (98740), Move In Date, Move Out Date, Tenant Form, Background Check, ID Received, Draft Lease, and Lease 1. The 'Tags' section lists Salesperson (Ana Cortes), Property 1 (Test Property 1), Property 2, Property 3, Funds Received by OEH, Move In Reminder, 1st Night Check 1, 1st Night Check 2, Logged in Spreadsheet, Filed Invoice, and Sent to Bookkeeper.

The activity stream on the right shows a sequence of messages from Ana Cortes and Corey Roehl. Ana Cortes sends a message on Dec 3, 2025, at 12:30 PM, followed by a reply on Dec 2, 2025, at 12:30 PM. She then changes the stage multiple times (Property search → New → Property search → Stage) and updates the status (Funds Received → New). Corey Roehl responds on Dec 1, 2025, at 1:40 PM with an original note about follow-up.

1.4 Activity View

- Centralized list of scheduled activities and reminders.
- Displays items generated by SLA timers or team scheduling.
- Allows staff to complete or reschedule follow-up tasks.

The Pipeline view displays a list of claims. The columns include To-Do (with a progress bar showing 8/8), Email, Call, Meeting, Document, and Signature. The claims listed are:

- #29 Ho/Cong-Le - Peoria, AZ 85381... \$ 0.00 Sent For Approval → 24h status check (Closed) 12/04/2025 A
- # 35 Loftis Family- Sherman, TX---- ... \$ 0.00 Lease Prep Reminder — Check Walk... (Lease Executed) 12/04/2025 A 3
- #32 Sterling - Owings Mills, MD 211... \$ 0.00 Sent For Approval → 24h status check (Closed) 12/04/2025 A
- testing \$ 0.00 Sent For Approval → 24h status chec... (Sent For Approval) 12/04/2025 A 2
- #20 Parker - Bryan TX 77807 (Ana) ... \$ 0.00 Lease Completion Checkpoint (Closed) 12/04/2025 A

A '+' button is available to 'Schedule activity'.

2. Searching and Filtering Claims

The CRM toolbar contains three essential tools for locating records:

2.1 Search Bar

Search by:

- Agent Referral (Relocation Specialist)
- Claim number

The screenshot shows the Pipeline search interface. At the top, there's a search bar labeled "search...". Below it, the "Filters" section is expanded, showing various filter options like "My Pipeline", "Unassigned", "Open Opportunities", and date-related filters ("Creation Date", "Closed Date"). To the right of the filters is a "Group By" section with options such as "Salesperson", "Sales Team", "Stage", "City", etc. Further right are sections for "Favorites" (with a "Save current search" option), "Updates" (showing \$0), and "Approved" (showing 0).

2.2 Filters

Common filters include:

- My Pipeline
- Unassigned
- Open Opportunities
- Creation Date
- Closed Date

Custom filters may also be created as needed.

This screenshot is similar to the one above, but the "Filters" section is highlighted with a red box. This emphasizes the importance of customizing the filter settings to suit specific needs.

2.3 Group By

Allows grouping records visually, such as:

- Salesperson
- Sales Team
- Stage
- City

Useful for internal organization and reporting.

The screenshot shows the Pipeline view with several sections: 'New' (0), 'Property search' (0), 'Filters' (My Pipeline, Unassigned, Open Opportunities, Creation Date, Closed Date, Won, Ongoing, Rotting, Lost, Custom Filter...), 'Group By' (Salesperson, Sales Team, Stage, City, Country, Lost Reason, Campaign, Medium, Source, Creation Date, Expected Closing, Closed Date, Properties, Custom Group), 'Favorites' (Save current search), 'Updates' (0), and 'Approved' (0).

3. Opening, Editing, and Saving Records

3.1 Opening a Record

- Click a claim card in Kanban view or
- Click a row in List view.

The screenshot shows the Pipeline view with a central 'Property Data Sheet' card for '#37 Belgard – Keizer, OR 97303 - Dec 4' (Julian Quinonez) which is 'Sent For Approval'. Other cards include 'New Claim Number -- #38' and 'ANA'S TEST CLAIM FOR LOOM'.

The screenshot shows the Pipeline view with a list of records. Each record includes a checkbox, a title, contact information, salesperson, expected revenue, stage, and action buttons (Email, SMS, Reschedule). Some records have specific icons like a green 'F' for a lead.

	Contact Name	Email	Salesperson	Expected Rev...	Stage	Action Buttons
<input type="checkbox"/> Opportunity						
<input type="checkbox"/> #25 Camargo – Marietta, GA 30064 (F) Nov 14 TWO PROPERTIES	Kimberly G	"Corey Roehl" <coreyroehl@overeasyhospitality.net>	F Frances Banegas	\$ 0.00	Closed	Email SMS
<input type="checkbox"/> #8 Prospect, KY Lison (Corey) Oct 15 - Need funds	Michael Lopez	Michael.Lopez@alesolutions.com	C Corey Roehl	\$ 0.00	Moved In / Extensions	Email SMS
<input type="checkbox"/> #2 Carnes - Florence, SC 29505 (Ana) Friday move in	Kelli McWilliams	Kelli.Mcwilliams@alesolutions.com	C Corey Roehl	\$ 0.00	Moved In / Extensions	Email SMS
<input type="checkbox"/> #1 Horwitz-Las Vegas, NV 89134 (Ana) Oct 23 Thursday!!! need to check in Friday	Lindsay Loza	Lindsay.Loza@alesolutions.com	C Corey Roehl	\$ 0.00	Moved In / Extensions	Email SMS
<input type="checkbox"/> #36 Fulton – Graham, NC 27253 - Dec 3	Kimberly Grena	"Corey Roehl" <coreyroehl@overeasyhospitality.net>	F Frances Banegas	\$ 0.00	Property search	Email SMS
<input type="checkbox"/> #29 Ho/Cong-Le – Peoria, AZ 85381 (F) 10/20	Katie Plaza	"Corey Roehl" <coreyroehl@overeasyhospitality.net>	F Frances Banegas	\$ 0.00	Closed	Reschedule Email SMS
<input type="checkbox"/> #34 Marinette WI (F) Nov 26	Victoria Schmit	"Corey Roehl" <coreyroehl@overeasyhospitality.net>	F Frances Banegas	\$ 0.00	Closed	Email SMS
<input type="checkbox"/> #28 Sewell – Covington, LA 70435 (F) Nov 18 - to far	Kimberly G	"Corey Roehl" <coreyroehl@overeasyhospitality.net>	F Frances Banegas	\$ 0.00	Closed	Email SMS
<input type="checkbox"/> #26 Woody – Washington, DC 20017 (F) Nov 18	Corey Roehl	"Corey Roehl" <coreyroehl@overeasyhospitality.net>	F Frances Banegas	\$ 0.00	Closed	Email SMS
<input type="checkbox"/> #37 Belgard – Keizer, OR 97303 - Dec 4	Julian Quinonez	"Corey Roehl" <coreyroehl@overeasyhospitality.net>	F Frances Banegas	\$ 0.00	Property Data Sheet	Email SMS
<input type="checkbox"/> testing	Ana Test Contact	"Corey Roehl" <coreyroehl@overeasyhospitality.net>		\$ 0.00	Sent For Approval	Reschedule Email SMS
<input type="checkbox"/> # 35 Loftis Family - Sherman, TX--- Dec 2 Tuesday Prop 2 needs Showing	Evan Ehrhardt	"Corey Roehl" <coreyroehl@overeasyhospitality.net>		\$ 0.00	Lease Executed	Reschedule Email SMS
<input type="checkbox"/> #33 Johnson/Lopez – Jersey City, NJ 07304 (F) Nov 26	Kimberly G	"Corey Roehl" <coreyroehl@overeasyhospitality.net>	F Frances Banegas	\$ 0.00	Closed	Email SMS
<input type="checkbox"/> ANA'S TEST CLAIM FOR LOOM	Ana Cortes	"Ana Monserrat" <anam@overeasyhospitality.net>	A Ana Cortes	\$ 0.00	Property search	Email SMS
<input type="checkbox"/> #32 Sterling – Owings Mills, MD 21117 (F) Nov 24	Kimberly G	"Corey Roehl" <coreyroehl@overeasyhospitality.net>		\$ 0.00	Closed	Reschedule Email SMS

3.2 Editing a Record

- Update required fields or VA steps.
(Highlighted information is for VA use only)

CRM Sales Leases Contacts Properties Reporting Configuration

New Pipeline ANA'S TEST CLAIM FOR LOOM

New Quotation New Rental Won Lost New 3h Property search 2d Property Data Sheet 1m Sent For Approval 15m Updates 51m ...

ANA'S TEST CLAIM FOR LOOM

Expected Revenue	Probability
\$ 0.00	at 100.00 %

Case Number	0	Tags
Agent Referral ?		Salesperson Ana Cortes
Guest Name ?	Test Name	Property 1 Test Property 1
Guest Phone Number ?	7144560091	Property 2 Winston Salem 27105
Guest Email ?	test@test.com	Property 3

Location	DR Address	Funds Received by OEH
City & State	State and city	Move In Reminder <input type="checkbox"/>
Zip	98740	1st Night Check 1 ? <input type="checkbox"/>
Move In Date ?		1st Night Check 2 ? <input type="checkbox"/>
Move Out Date ?		Logged in Spreadsheet <input type="checkbox"/>
Tenant Form ?	<input type="checkbox"/>	Filed Invoice <input type="checkbox"/>
Background Check ?	<input type="checkbox"/>	Sent to Bookkeeper <input type="checkbox"/>
ID Received	<input type="checkbox"/>	
Draft Lease ?	<input type="checkbox"/>	
Lease 1 ?	<input type="checkbox"/>	
Sent Next Instructions ?	<input type="checkbox"/>	

[+ Add Property](#)

Notes	Contacts	VA Check Boxes	Leases
Property Sheet Uploaded ? <input checked="" type="checkbox"/>	Contacted Property Owner <input type="checkbox"/>		
Property Approved <input checked="" type="checkbox"/>	Received Move Out Instructions <input type="checkbox"/>		
Walk Through Nov 26	Received Security Deposit Policy <input type="checkbox"/>		
Property Accepted <input checked="" type="checkbox"/>	Contacted Policyholder <input type="checkbox"/>		
	Sent Banking Details <input type="checkbox"/>		
	Property Damage <input type="checkbox"/>		
	Security Deposit Received OEH <input type="checkbox"/>		

3.3 Saving

- Click Save when changes are complete.
- Leaving the page without saving may result in data loss.

New Quotation New Rental Won Lost

New 3h Property search 2d Property Data Sheet 1m Sent For Approval 15m Updates 51m ...

ANA'S TEST CLAIM FOR LOOM

Expected Revenue Probability
\$ 0.00 at 100.00 %

Case Number	0	Tags
Agent Referral ?		Salesperson Ana Cortes
Guest Name ?	Test Name	Property 1 Test Property 1
Guest Phone Number ?	7144560091	Property 2 Winston Salem 27105
Guest Email ?	test@test.com	Property 3
Location	DR Address	Funds Received by OEH Dec 5
City & State	State and city	Move In Reminder <input type="checkbox"/>
Zip	98740	1st Night Check 1 ? <input type="checkbox"/>
Move In Date ?		1st Night Check 2 ? <input type="checkbox"/>
Move Out Date ?		Logged in Spreadsheet <input type="checkbox"/>
Tenant Form ?	<input type="checkbox"/>	Filed Invoice <input type="checkbox"/>
Background Check ?	<input type="checkbox"/>	Sent to Bookkeeper <input type="checkbox"/>

4. Understanding the Claim Layout

Inside each claim, users will see:

4.1 Header

Contains primary fields such as:

- Claim Number and Title
- Agent Referral (Relocation Specialist)
- Guest Name, Address and Contact information
- Property 1, 2 and three
- Sales Person

New Quotation New Rental Won Lost New 3h Property search 2d Property Data Sheet 1m Sent For Approval 15m Updates 51m ...

ANA'S TEST CLAIM FOR LOOM

Expected Revenue	Probability		
\$ 0.00	at 100.00 %		
Case Number 0		Tags	
Agent Referral ?		Salesperson	Ana Cortes
Guest Name ?	Test Name	Property 1	Test Property 1
Guest Phone Number ?	7144560091	Property 2	Winston Salem 27105
Guest Email ?	test@test.com	Property 3	
Location	DR Address	Funds Received by OEH	Dec 5
City & State	State and city	Move In Reminder	<input type="checkbox"/>
Zip	98740	1st Night Check 1 ?	<input type="checkbox"/>
Move In Date ?		1st Night Check 2 ?	<input type="checkbox"/>
Move Out Date ?		Logged in Spreadsheet	<input type="checkbox"/>
Tenant Form ?	<input type="checkbox"/>	Filed Invoice	<input type="checkbox"/>
Background Check ?	<input type="checkbox"/>	Sent to Bookkeeper	<input type="checkbox"/>
ID Received	<input type="checkbox"/>		
Draft Lease ?	<input type="checkbox"/>		
Lease 1 ?	<input type="checkbox"/>		
Sent Next Instructions ?	<input type="checkbox"/>		
Lease 2 ?	<input type="checkbox"/>		

4.2 Tabs

Tabs include:

- **Notes**
 - To put quick notes in. Free field

Background Check ?	<input type="checkbox"/>	Sent to Bookkeeper	<input type="checkbox"/>
ID Received	<input type="checkbox"/>		
Draft Lease ?	<input type="checkbox"/>		
Lease 1 ?	<input type="checkbox"/>		
Sent Next Instructions ?	<input type="checkbox"/>		
Lease 2 ?	<input type="checkbox"/>		
W9 Received	<input type="checkbox"/>		
Funds Sent To Owner	Nov 25		
Funds Received by Owner	Nov 25		
Move In Instructions Sent 1	<input type="checkbox"/>		
Move In Instructions Sent 2	<input type="checkbox"/>		
<input checked="" type="checkbox"/> Notes <input type="checkbox"/> Contacts <input type="checkbox"/> VA Check Boxes <input type="checkbox"/> Leases			

- **Contacts**
 - Relocation Specialist information. **DO NOT TOUCH**

W9 Received	<input type="checkbox"/>		
Funds Sent To Owner	Nov 25		
Funds Received by Owner	Nov 25		
Move In Instructions Sent 1	<input type="checkbox"/>		
Move In Instructions Sent 2	<input type="checkbox"/>		
<input checked="" type="checkbox"/> Notes <input checked="" type="checkbox"/> Contacts <input type="checkbox"/> VA Check Boxes <input type="checkbox"/> Leases			

COMPANY INFORMATION		CONTACT INFORMATION	
Company Name ?		Contact Name Ana Cortes	
Address	Street...	Job Position	
	Street 2...		
City	State	Website ?	e.g. https://www.odoo.com
Country			
MARKETING		OWNERSHIP	
Campaign ?		Sales Team Claims VA Pipeline	
Medium ?			
Source ?			
Referred By			

- **VA Check Boxes**
 - Steps for the pipeline and claim process as in this tab. VA USE ONLY.

Sent Next Instructions ?	<input type="checkbox"/>				
Lease 2 ?	<input type="checkbox"/>				
W9 Received	<input type="checkbox"/>				
Funds Sent To Owner	Nov 25				
Funds Received by Owner	Nov 25				
Move In Instructions Sent 1	<input type="checkbox"/>				
Move In Instructions Sent 2	<input type="checkbox"/>				
<table border="1"> <tr> <td>Notes</td> <td>Contacts</td> <td style="background-color: #e0e0e0;">VA Check Boxes</td> <td>Leases</td> </tr> </table>		Notes	Contacts	VA Check Boxes	Leases
Notes	Contacts	VA Check Boxes	Leases		
Property Sheet Uploaded ?	<input checked="" type="checkbox"/>	Contacted Property Owner	<input type="checkbox"/>		
Property Approved	<input checked="" type="checkbox"/>	Received Move Out Instructions	<input type="checkbox"/>		
Walk Through	Nov 26	Received Security Deposit Policy	<input type="checkbox"/>		
Property Accepted	<input checked="" type="checkbox"/>	Contacted Policyholder	<input type="checkbox"/>		
		Sent Banking Details	<input type="checkbox"/>		
		Property Damage	<input type="checkbox"/>		
		Security Deposit Received OEH	<input type="checkbox"/>		

- **Leases**

- Additional Information on the Lease

Lease 2 ?	<input type="checkbox"/>				
W9 Received	<input type="checkbox"/>				
Funds Sent To Owner	Nov 25				
Funds Received by Owner	Nov 25				
Move In Instructions Sent 1	<input type="checkbox"/>				
Move In Instructions Sent 2	<input type="checkbox"/>				
<table border="1"> <tr> <td>Notes</td> <td>Contacts</td> <td style="background-color: #e0e0e0;">VA Check Boxes</td> <td>Leases</td> </tr> </table>		Notes	Contacts	VA Check Boxes	Leases
Notes	Contacts	VA Check Boxes	Leases		
ACH Received	<input type="checkbox"/>	Move-in INS number 1	<input type="checkbox"/>		
		Move-in INS number 2	<input type="checkbox"/>		
		Connect	<input type="checkbox"/>		

4.3 Chatter Panel

Used for all communication associated with the claim:

- **Message:** External communication (tenant, relocation specialist, landlord, etc.)
- **Log Note:** Internal communication for OEH staff
- **Schedule Activity:** Create reminders or follow-ups

[Send message](#)[Log note](#)[Activity](#)

Dec 3, 2023

A

ana.cortes112011@gmail.com Dec 3, 12:30 PM

Subject: Re: ANA'S TEST CLAIM FOR LOOM
Testing the reply

...

A

Ana Cortes Dec 3, 12:30 PM

This is a test please reply

Dec 2, 2025

A

Ana Cortes Dec 2, 4:18 PM

Stage changed

New → **Property search** (Stage)**A**

Ana Cortes Dec 2, 4:18 PM

Stage changed

Property search → **New** (Stage)**A**

Ana Cortes Dec 2, 4:06 PM

Stage changed

New → **Property search** (Stage)**A**

Ana Cortes Dec 2, 4:05 PM

Stage changed

Funds Out → **New** (Stage)**A**

Ana Cortes Dec 2, 10:46 AM

✓ To-Do done : Funds Out — Owner Confirmation

Original note:

Follow up with property owner to confirm funds were received and next steps are ready.

Dec 1, 2025

C

Corey Roehl Dec 1, 1:40 PM

Admasu Lalisho → **Ana Cortes** (Contact Name)**A**

Ana Cortes Dec 1, 12:01 PM

✓ To-Do done : Funds Out — Owner Confirmation



5. Moving Claims Between Stages

All stages transition through automation:

- Users may manually move a claim only **when necessary** and **only when all required information is complete**.
- Claims can be moved by dragging the card from one stage to another in Kanban view or by selecting the next stage inside the claim form.

The screenshot shows the Pipeline view with the following stages: New, Property search, Property Data Sheet, Sent For Approval, Updates, and Approved. A specific claim record titled "ANA'S TEST CLAIM FOR LOOM" is highlighted in the "Property Data Sheet" stage. The record has a rating of 3 stars and includes a note: "ANA'S TEST CLAIM FOR LOOM". The pipeline bar shows the current stage is "Property Data Sheet".

Important: Incorrect stage movement may disrupt workflows or create incomplete claim records.
Only move a claim manually when the process has been fully completed.

6. Breadcrumb Navigation

The breadcrumb trail appears at the top of the screen and shows your current location in the system.

Example: [New](#) → [Property Search](#) → [Property Data Sheet](#) → [Sent For Approval](#)

You may click any part of the breadcrumb to return to a previous view.

The screenshot shows the "Property Data Sheet" view for the claim "ANA'S TEST CLAIM FOR LOOM". The breadcrumb navigation at the top is highlighted with a red box. It shows the path: New (3h) > Property search (2d) > Property Data Sheet (1m) > Sent For Approval (15m) > Updates (51m) > ...

The main form displays various claim details such as Expected Revenue (\$0.00), Case Number (0), Agent Referral (Test Name), Guest Name (7144560091), Guest Phone Number (test@test.com), Location (DR Address), City & State (State and city), Zip (98740), Move In Date, Move Out Date, and Tenant Name. On the right side, there is a sidebar for "Send message", "Log note", and "Activity". The activity feed shows several messages from Ana Cortes regarding the claim, with the most recent message being a test reply.

7. Best Practices

- Always confirm you are editing the correct record before making updates.
- Use the Search and Filter tools before asking for assistance locating a claim.
- Save frequently to avoid lost changes.
- Review internal notes and previous chatter before performing updates.
- Maintain accurate and consistent data entry at all times.

8. Common Issues and Solutions

Issue	Likely Cause	Resolution
Changes not saving	Edit mode not activated	Click Edit , make changes, then Save
Claim appears missing	Filter applied	Clear filters or use search bar
Unable to move claim	Required data incomplete	Complete all fields/steps first
CRM interface not loading	Browser cache	Refresh or try another browser