

# Using a Checklist



This guide shows how to use a checklist within iamproperty CRM.

1

Navigate to

<https://crm.iamproperty.com/Lettings/Property/Record/10324688#checklist>

The screenshot displays the iamproperty CRM interface. On the left is a sidebar with navigation options: Live Jobs (0), EPC Rating (B), Details, Checklist, Appraisals, Inspections, Accounts, Compliance, Information, Maintenance, Payment, and Marketing. The main content area shows the property details for 162 Yew Tree Close, Hurworth, Darlington, DL2 2HX. It includes a 'View Sales Version' button, an 'Appraisal' button, and a '2 Tenants' badge. Below the property address, there are sections for 'Lead landlord: Mr Alfie Martin' and 'Lead tenant: Lettings Applicant86', each with a 'View' button. A 'Reference' field is also present. The 'PROPERTY PICTURES' section shows a large image of the property. To the right, the 'Property Address' section shows the postcode 'DL2 2HX'. The 'Property Information' section at the bottom right contains several input fields, some with icons like a checkmark, a magnifying glass, and a location pin.

## 2 Click "Checklist"

The screenshot shows the 'iam property' dashboard. On the left sidebar, the 'Checklist' menu item is highlighted with an orange circle. The main content area displays property details for '162 Yew Tree Close, Hurworth, Darlington, DL2 2HX'. It includes a 'View Sale' button, a 'View Landlords' button, and a 'View Tenants' button. Below these, there are fields for 'Reference:', 'Negotiator: Training Dave', and 'Branch: Morgan & Co'. The 'PROPERTY PICTURES' section has an 'Upload' button. The 'Property Address' section shows the 'Postcode: DL2 2HX'.

## 3 Select the Checklist you are going to complete.

The screenshot shows the 'Checklist' selection screen. The 'Lettings property setup' checklist item is highlighted with an orange circle. The main content area displays the same property details as the previous screenshot. Below the property details, there are fields for 'Reference:', 'Negotiator: Training Dave', 'Branch: Morgan & Co', and 'Status: Prospect'. The 'Checklist' section lists four items: 'Lettings property setup' (0 of 9 checked), 'Quarterly check in' (0 of 3 checked), 'Safety checks' (0 of 9 checked), and 'Test' (0 of 1 checked). A yellow circular button with a document icon is located at the bottom right.

#### 4 Click the checkbox to mark the item completed

The screenshot shows a software interface for property management. On the left is a sidebar with navigation options: Live Jobs, EPC Rating, Details, Checklist, Appraisals, Inspections, Accounts, Compliance, Information, Maintenance, Payment, Marketing, and Key Control. The main area displays property details for '162 Yew Tree Close, Hurworth, Darlington, DL2 2HX' with 4 bedrooms, 3 bathrooms, and a price of £1200.00 pcm. It also shows 'Available' status and '2 Tenants'. Below this are buttons for 'Lead landlord: Mr Alfie Martin' and 'Lead tenant: Lettings Applicant86'. A 'Checklist' section titled 'Lettings property setup' contains four items, each with an unchecked checkbox and an edit icon: 'EPC Check complete and certificate received?', 'Gas Safety Received', 'Electrical Check Complete and certificate received?', and 'Agreement Signed?'. At the top right of the main area are buttons for 'View Sales Version', 'Appraisal', and 'Warning'.

#### 5 Notes can be added to the checklist item, either before or after the item is marked completed. Click here to add the notes.

This screenshot shows the same 'Lettings property setup' checklist as in the previous image, but with the first item, 'EPC Check complete and certificate received?', now checked. To the right of the checked item, it says 'Checked by Training Dave on 10/06/2025 16:53'. An 'Edit Notes' button is visible next to the edit icon for this item. The other three items remain unchecked. The interface elements, including the sidebar and property details, are consistent with the previous screenshot.

6 Click here to save the notes.

The screenshot shows the 'Lettings property setup' form. At the top, the property address is '162 Yew Tree Close, Hurworth, Darlington, DL2 2HX' with 4 bedrooms and 3 bathrooms, priced at £1200.00 pcm. It is marked as 'Available' and has '2 Tenants'. Below this, there are sections for 'Lead landlord: Mr Alfie Martin' and 'Lead tenant: Lettings Applicant86', each with a 'View Landlords' or 'View Tenants' button. A navigation bar at the bottom includes fields for 'Reference:', 'Negotiator: Training Dave', 'Branch: Morgan & Co', and 'Status: Prospect'. The main section is titled 'Lettings property setup' and shows a checklist with 0 of 9 items checked. The first item, 'EPG Check complete and certificate received?', is checked and has a note 'Checked by Training Dave on 10/06/2025 16:53'. Below it is a text area for 'add any notes here'. To the right of the text area, there are icons for 'Save Notes' (a document with a pencil), 'Cancel' (a red X), and 'Save' (a floppy disk). The 'Save Notes' button is highlighted with an orange circle.

7 A date can also be added to the item. If a date is added the checklist, item will show in the Activity List, with a reminder for the item the date is set for.

The screenshot shows the 'Lettings property setup' form, similar to the one above. The 'EPG Check complete and certificate received?' item is still checked. The 'Gas Safety Received' item is now visible and unchecked, with a text area for 'add any notes here'. To the right of the 'Gas Safety Received' text area, there are icons for 'Add Date Required' (a calendar), 'Cancel' (a red X), and 'Save' (a floppy disk). The 'Add Date Required' button is highlighted with an orange circle.

0

B

View Sales Version

Appraisal

Warning

162 Yew Tree Close, Hurworth, Darlington, DL2 2HX |

4 3 | £ 1200.00 pcm

Available 2 Tenants

1

Lead landlord: Mr Alfie Martin

View Landlords

2

Lead tenant: Lettings Applicant86

View Tenants

Reference:

Negotiator: Training Dave

Branch Morgan & Co

Status Prospect

Lettings property setup

☒

EPC Check complete and certificate received?

Checked by Training Dave on 10/06/2025 16:53

☐

Gas Safety Received

add an y notes here

☐

Electrical Check Complete and certificate received?

☐

Agreement Signed?

June 2025

Sun	Mon	Tue	Wed	Thu	Fri	Sat
25	26	27	28	29	30	31
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	1	2	3	4	5

checked

Date Required

8

Click here to mark a line as completed. Once marked complete the line will be struck-through and the username, date and time of completion will be added to the row.

Live Jobs 0

EPC Rating B

Details

Checklist

Appraisals

Inspections

Accounts

Compliance

Information

maintenance

Payment

Marketing

Key Control

View Sales Version

Appraisal

162 Yew Tree Close, Hurworth, Darlington, DL2 2HX |

4 3 | £ 1200.00 pcm

Available 2 Tenants

1

Lead landlord: Mr Alfie Martin

View Landlords

2

Lead tenant: Lettings Applicant86

View Tenants

Reference:

Negotiator: Training Dave

Branch Morgan & Co

Status Prospect

Lettings property setup

☒

EPC Check complete and certificate received?

Checked by Training Dave on 10/06/2025 16:53

☐

Gas Safety Received

add an y notes here

Date Required: 11/06/2025

☐

Electrical Check Complete and certificate received?

☐

Agreement Signed?

9 Click here to clear the completion date

View Sales Version

Appraisal

Warning

162 Yew Tree Close, Hurworth, Darlington, DL2 2HX |  
4 3 | £1200.00 pcm

Available2 Tenants

1Lead landlord:  
Mr Alfie Martin

View Landlords

2Lead tenant:  
Lettings Applicant86

View Tenants

Calendar

Video

Location

Photo

More

Reference:

Negotiator: Training Dave

Branch Morgan & Co

Status Prospect

Lettings property setup

0 of 9 checked

☒

EPG Check complete and certificate received?

Checked by Training Dave on 10/06/2025 16:53

Clear

Save

☒

Gas Safety Received

Date Required: 11/06/2025

Checked by Training Dave on 10/06/2025 16:56

add any notes here

Clear Date Required

Clear

Save

☐

Electrical Check Complete and certificate received?

Clear

Save

☐

Agreement Signed?

Clear

Save

Save