

Using a Checklist



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

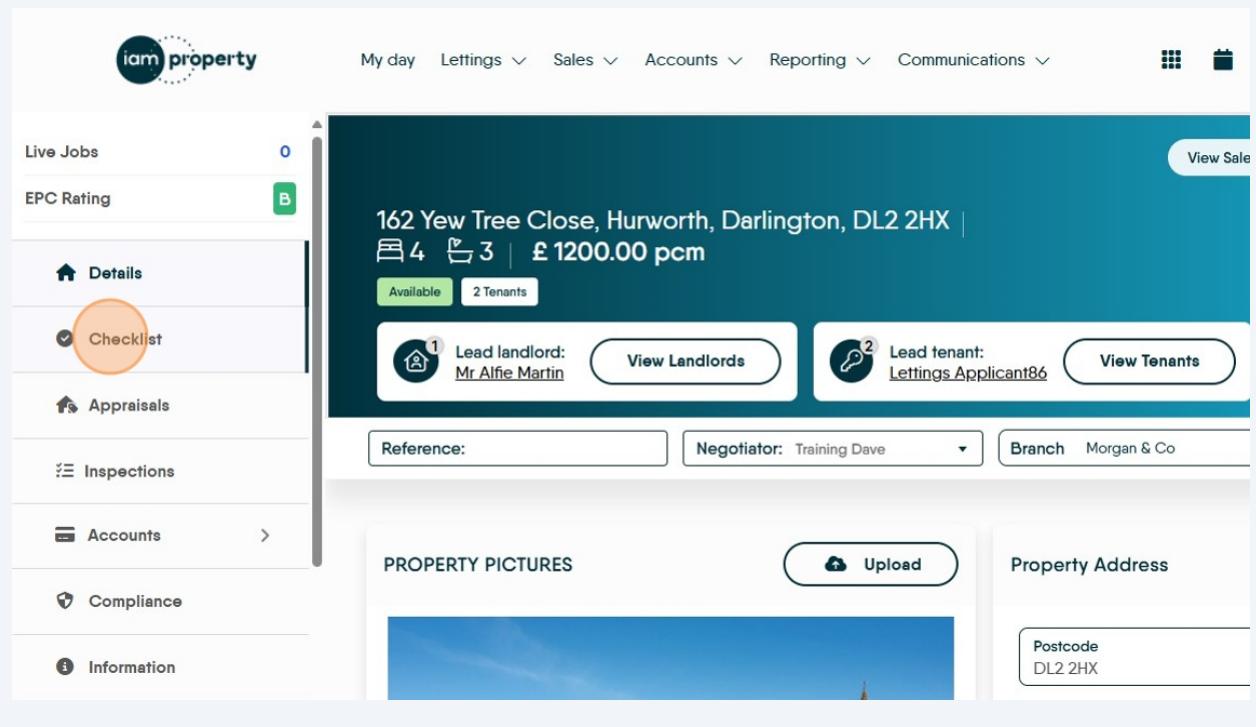
1

Navigate to

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

The screenshot shows the iamproperty CRM interface. The main content area displays a property record for 162 Yew Tree Close, Hurworth, Darlington, DL2 2HX. The property is listed as available and is currently let to Mr Alfie Martin (lead landlord) and Lettings_Applicant86 (lead tenant). The interface includes a sidebar with various tabs: Details, Checklist, Appraisals, Inspections, Accounts, Compliance, Information, maintenance, Payment, and Marketing. The main content area also includes sections for Property Pictures, Property Address, and Property Information.

2 Click "Checklist"



Live Jobs 0

EPC Rating B

Details

Checklist (highlighted with an orange circle)

Appraisals

Inspections

Accounts

Compliance

Information

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

4 3 | **£1200.00 pcm**

Available 2 Tenants

Lead landlord: Mr Alfie Martin [View Landlords](#)

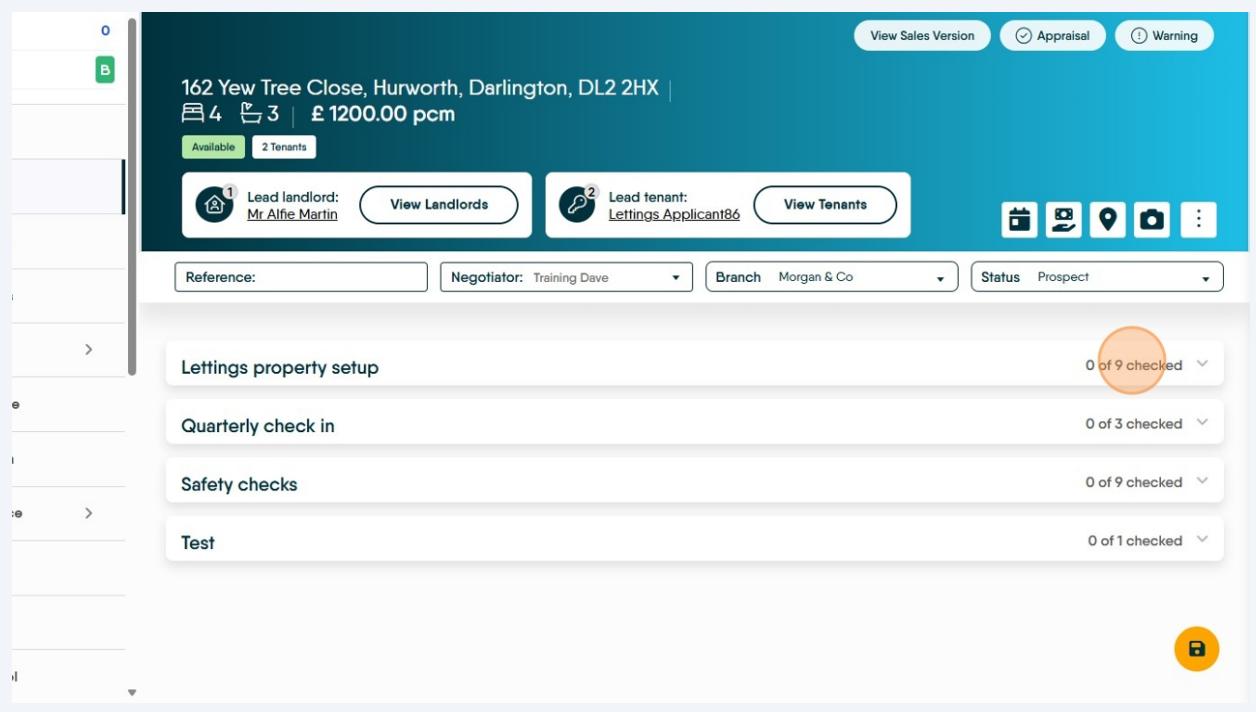
Lead tenant: Lettings Applicant86 [View Tenants](#)

Reference: Negotiator: Training Dave Branch Morgan & Co

PROPERTY PICTURES [Upload](#)

Property Address Postcode DL2 2HX

3 Select the Checklist you are going to complete.



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

Available 2 Tenants

Lead landlord: Mr Alfie Martin [View Landlords](#)

Lead tenant: Lettings Applicant86 [View Tenants](#)

View Sales Version [Appraisal](#) [Warning](#)

Reference: Negotiator: Training Dave Branch Morgan & Co Status Prospect

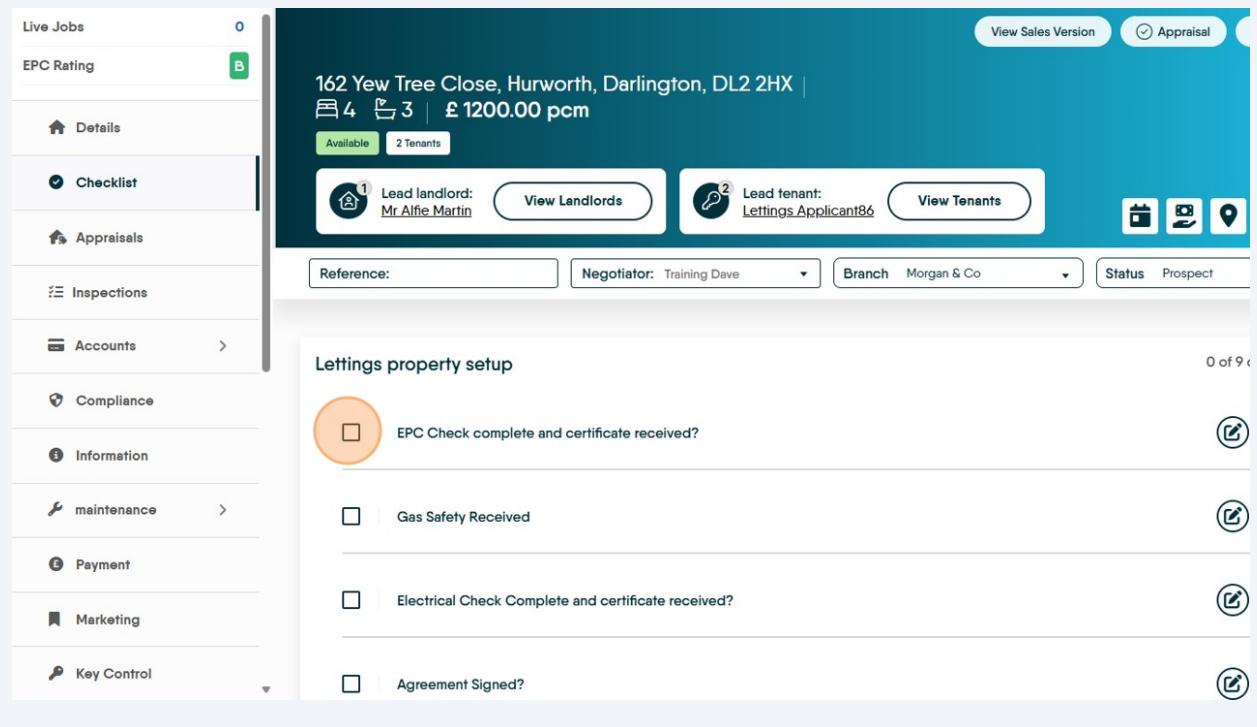
Lettings property setup 0 of 9 checked

Quarterly check in 0 of 3 checked

Safety checks 0 of 9 checked

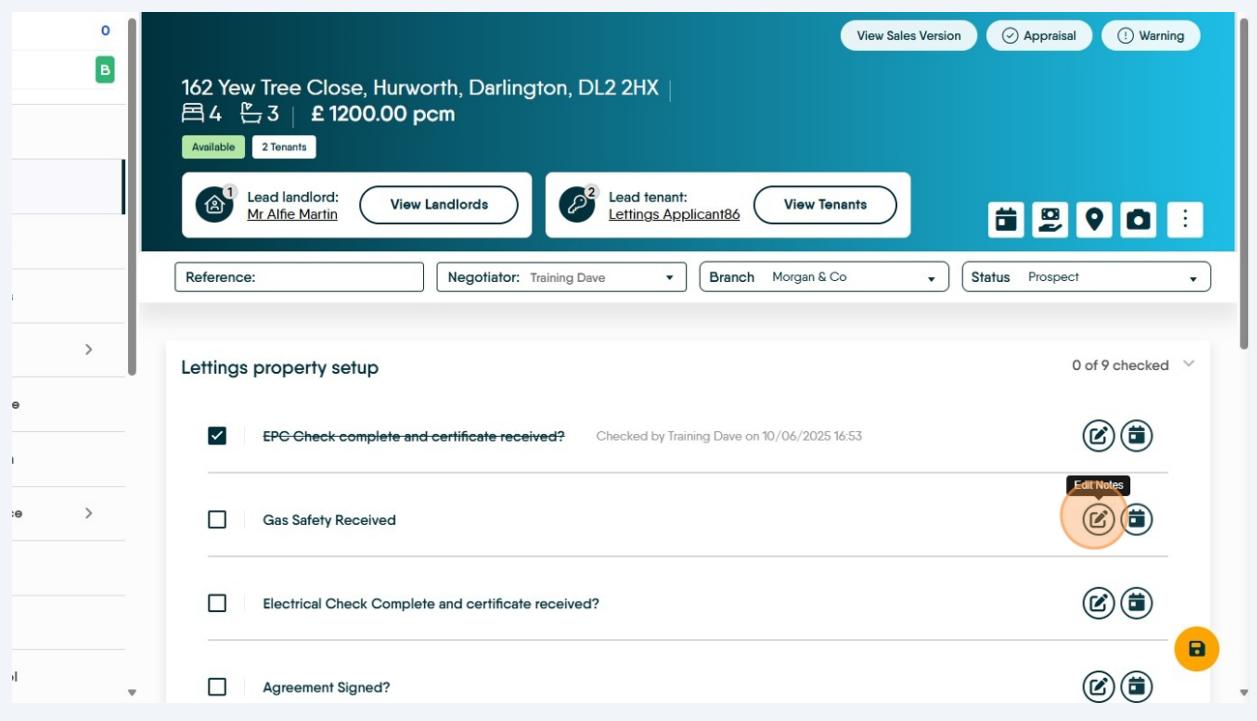
Test 0 of 1 checked

4 Click the checkbox to mark the item completed



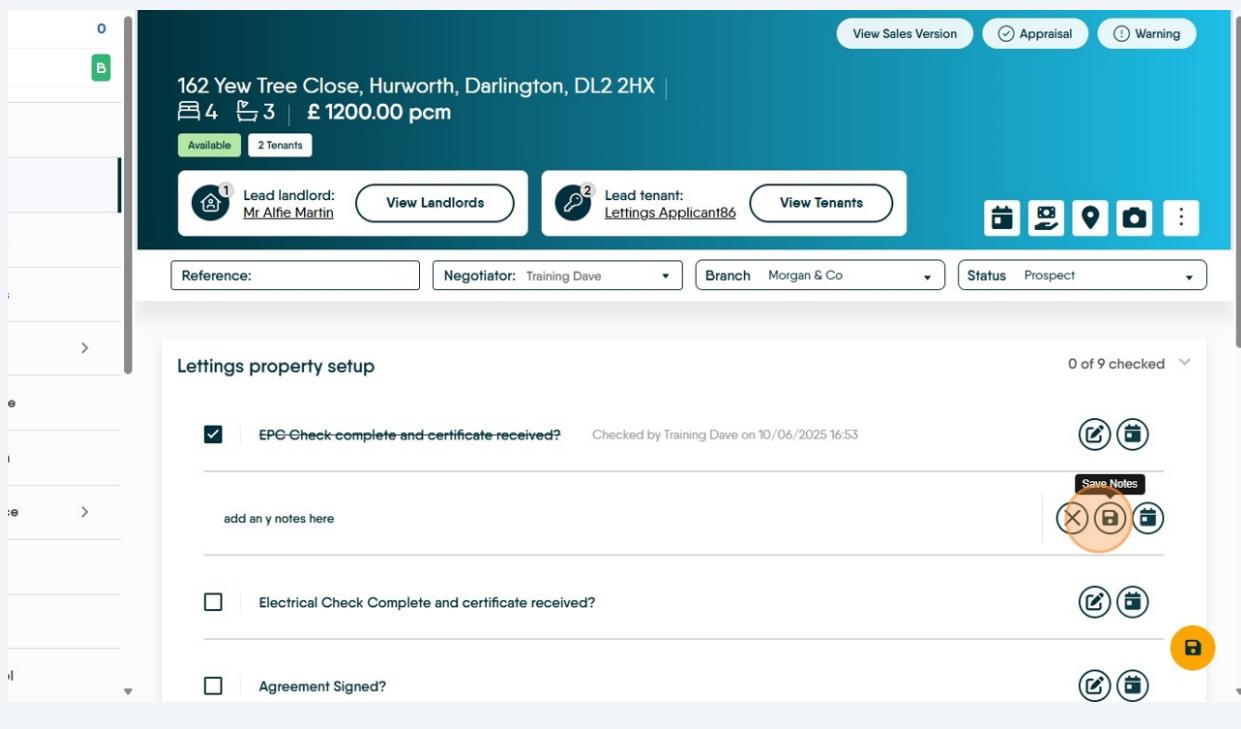
The screenshot shows the software's main dashboard for a property at 162 Yew Tree Close, Hurworth, Darlington, DL2 2HX. The left sidebar contains navigation links for 'Live Jobs', 'EPC Rating', 'Details', 'Checklist' (which is currently selected), 'Appraisals', 'Inspections', 'Accounts', 'Compliance', 'Information', 'Maintenance', 'Payment', 'Marketing', and 'Key Control'. The main content area displays the property details: 4 bedrooms, 3 bathrooms, £1200.00 pcm, and a status of 'Available' with '2 Tenants'. Below this are buttons for 'View Landlords' and 'View Tenants'. Further down are fields for 'Reference', 'Negotiator', 'Branch', and 'Status'. A section titled 'Lettings property setup' contains a checklist with four items: 'EPC Check complete and certificate received?' (checkbox is empty), 'Gas Safety Received' (checkbox is empty), 'Electrical Check Complete and certificate received?' (checkbox is empty), and 'Agreement Signed?' (checkbox is empty). Each checklist item has a small edit icon to its right.

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



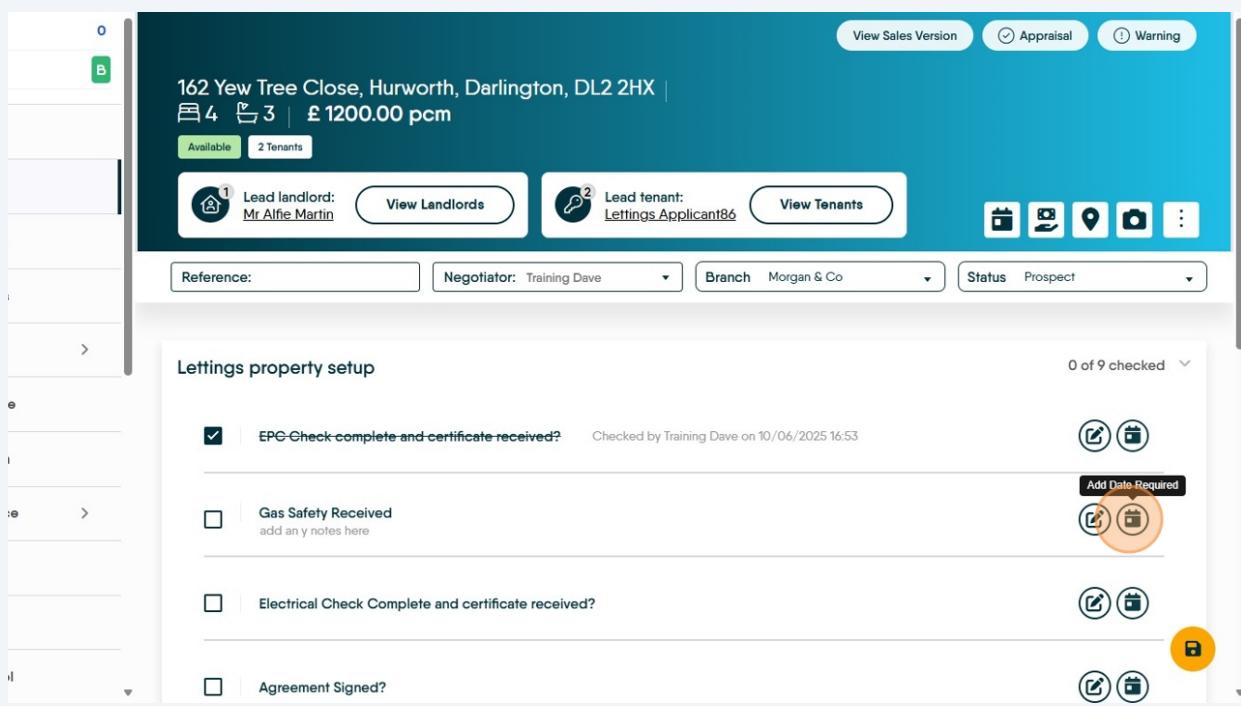
The screenshot shows the same property listing and sidebar as the previous image. The 'Checklist' section now shows the first item, 'EPC Check complete and certificate received?', has been checked. A note is added next to it: 'Checked by Training Dave on 10/06/2025 16:53'. The other three items in the checklist remain uncheckable. The 'Edit Notes' button is highlighted with an orange circle.

6 Click here to save the notes.



The screenshot shows the Rightmove software interface for a property listing at 162 Yew Tree Close, Hurworth, Darlington, DL2 2HX. The listing is for 4 bedrooms, 3 bathrooms, and £1200.00pcm. The 'Lettings property setup' checklist is open, showing three items: 'EPC Check complete and certificate received?' (checked), 'Electrical Check Complete and certificate received?' (unchecked), and 'Agreement Signed?' (unchecked). The 'Save Notes' button is highlighted with a red 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 Rightmove software interface for the same property listing. The 'Lettings property setup' checklist is open, showing three items: 'EPC Check complete and certificate received?' (checked), 'Gas Safety Received' (unchecked), and 'Electrical Check Complete and certificate received?' (unchecked). The 'Gas Safety Received' item has a date added: 'add an y notes here' (checked) with a date of '10/06/2025 16:53'. The 'Add Date Required' button is highlighted with a red circle.

Lettings property setup

EPC Check complete and certificate received? Checked by Training Dave on 10/06/2025 16:53

Gas Safety Received add any notes here

Electrical Check Complete and certificate received?

Agreement Signed?

June 2025

checked

10

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.

Lettings property setup

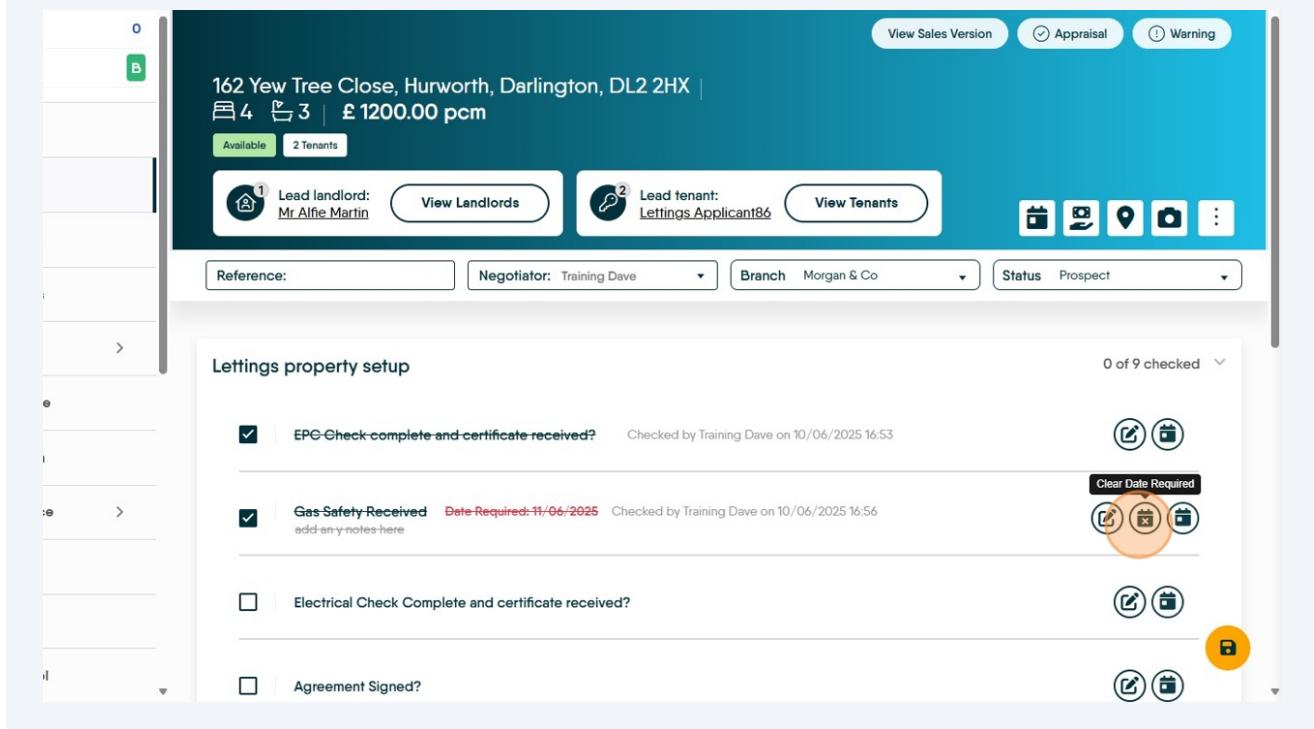
EPC Check complete and certificate received? Checked by Training Dave on 10/06/2025 16:53

Gas Safety Received Date Required: 11/06/2025 add any notes here

Electrical Check Complete and certificate received?

Agreement Signed?

9 Click here to clear the completion date



The screenshot shows a software interface for managing property checks. At the top, there are buttons for 'View Sales Version', 'Appraisal', and 'Warning'. Below this, property details are displayed: '162 Yew Tree Close, Hurworth, Darlington, DL2 2HX | 4 3 | £1200.00 pcm'. There are buttons for 'Available' and '2 Tenants'. Below the property details, there are sections for 'Lead landlord: Mr Alfie Martin' and 'Lead tenant: Lettings Applicant86'. Further down, there are fields for 'Reference:', 'Negotiator: Training Dave', 'Branch: Morgan & Co', and 'Status: Prospect'. The main content area is titled 'Lettings property setup' and shows a list of checks:

- EPG Check complete and certificate received? Checked by Training Dave on 10/06/2025 16:53
- Gas Safety Received Date Required: 11/06/2025 Checked by Training Dave on 10/06/2025 16:56 add any notes here
- Electrical Check Complete and certificate received?
- Agreement Signed

On the right side of the list, there are icons for edit, delete, and a yellow 'Clear Date Required' button. The 'Gas Safety Received' row is highlighted with a red circle around the 'Clear Date Required' button.