

# Landlord - Client Portals in iamproperty CRM



This guide will show the Landlord Portals.

Giving a comprehensive walkthrough of the client portals within the iamproperty CRM, making it an essential resource for users looking to enhance their Clients property management experience.

By following the detailed steps, users can efficiently access vendor functionalities, manage properties, view feedback, and handle compliance documents.

## Landlord Portal

### 1 Type your Username and Password Click "Sign In"

**1** Still getting used to new-look CRM?  
If so, you can still use the previous CRM by clicking the link on the right.

[Click here](#)

### Sign in

Username

Password

☐ Remember me

[Forgot your password?](#)

**Your partner for today and tomorrow**

At iamproperty we're developing everything you need under one roof, one supplier relationship. With a ecosystem will continue to grow and evolve with your agency, and freeing you up to do what you do best.

[Find out more](#)

2

The first screen is the News Feed, this is set from the Configuration screen and is created by you.

Welcome Back, **Pamela Green**

#### LATEST NEWS FROM OVHOMES.COM

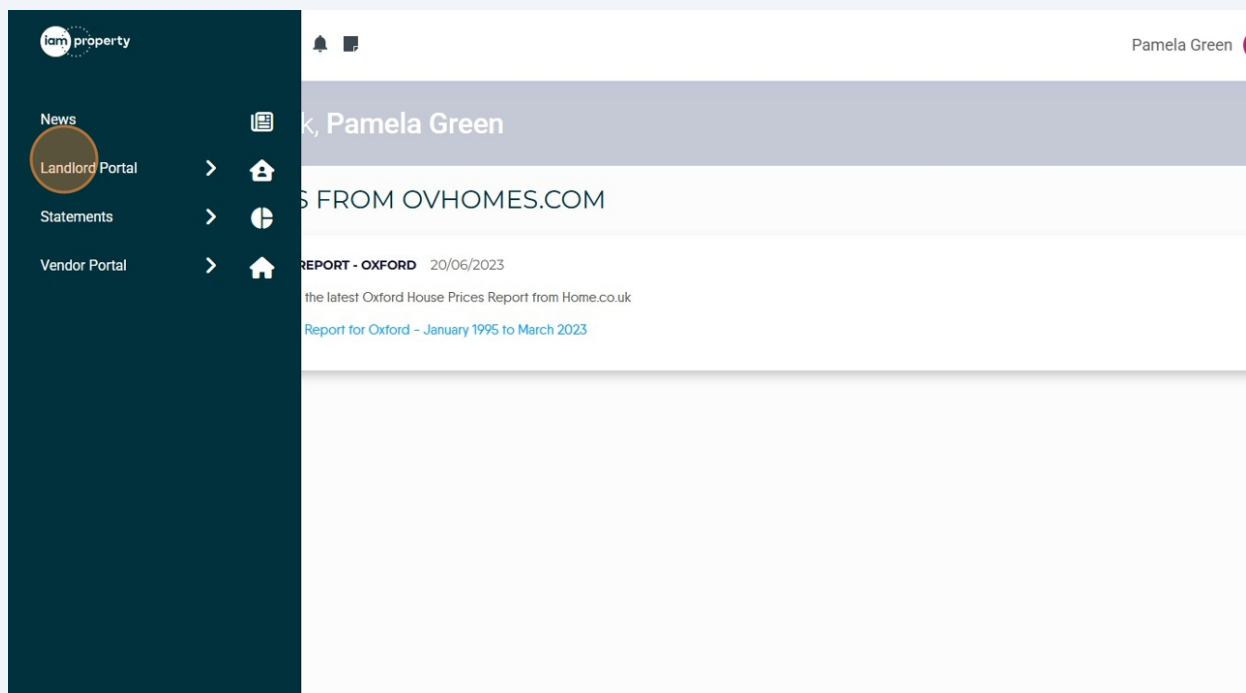
**LATEST HOUSE PRICES REPORT - OXFORD** 20/06/2023

Please find below a link to the latest Oxford House Prices Report from Home.co.uk

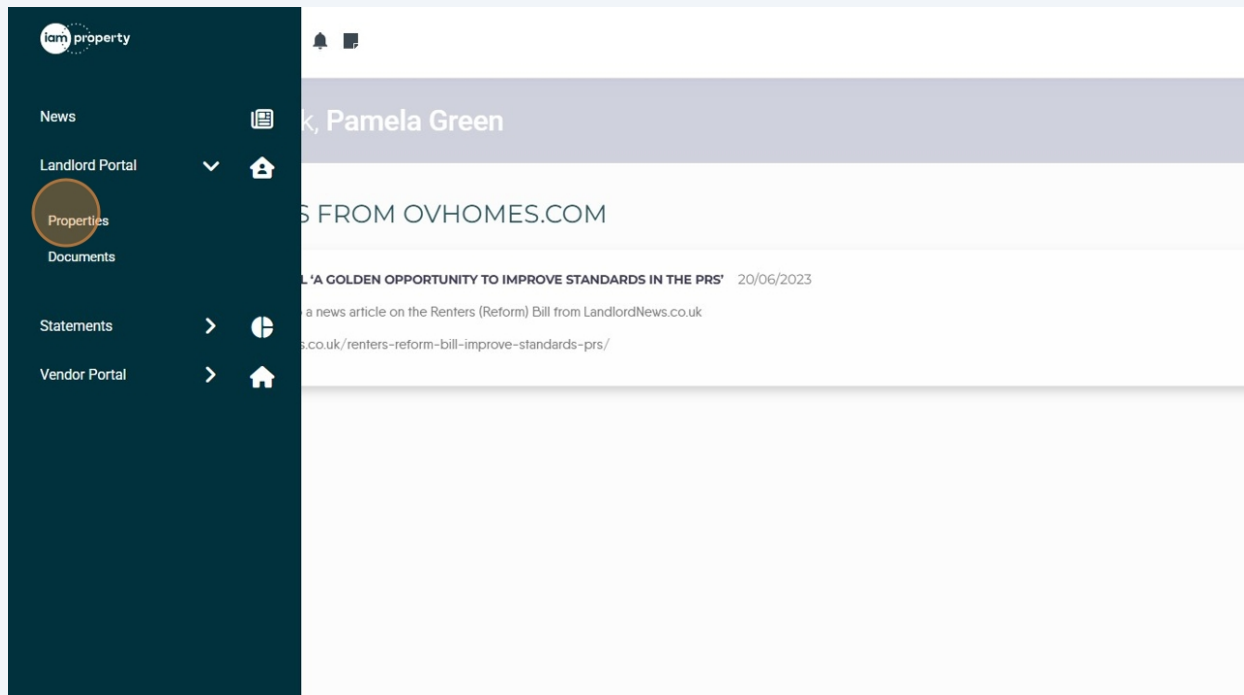
[Home.co.uk: House Prices Report for Oxford - January 1995 to March 2023](#)

3

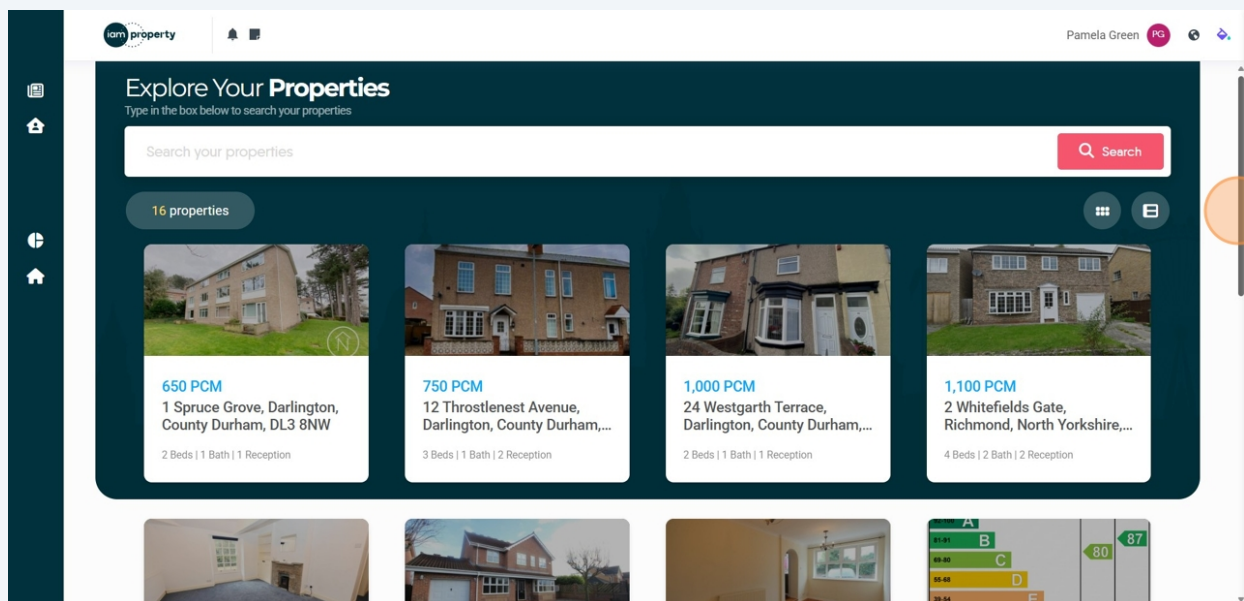
Click "Landlord Portal"



#### 4 Click "Properties"

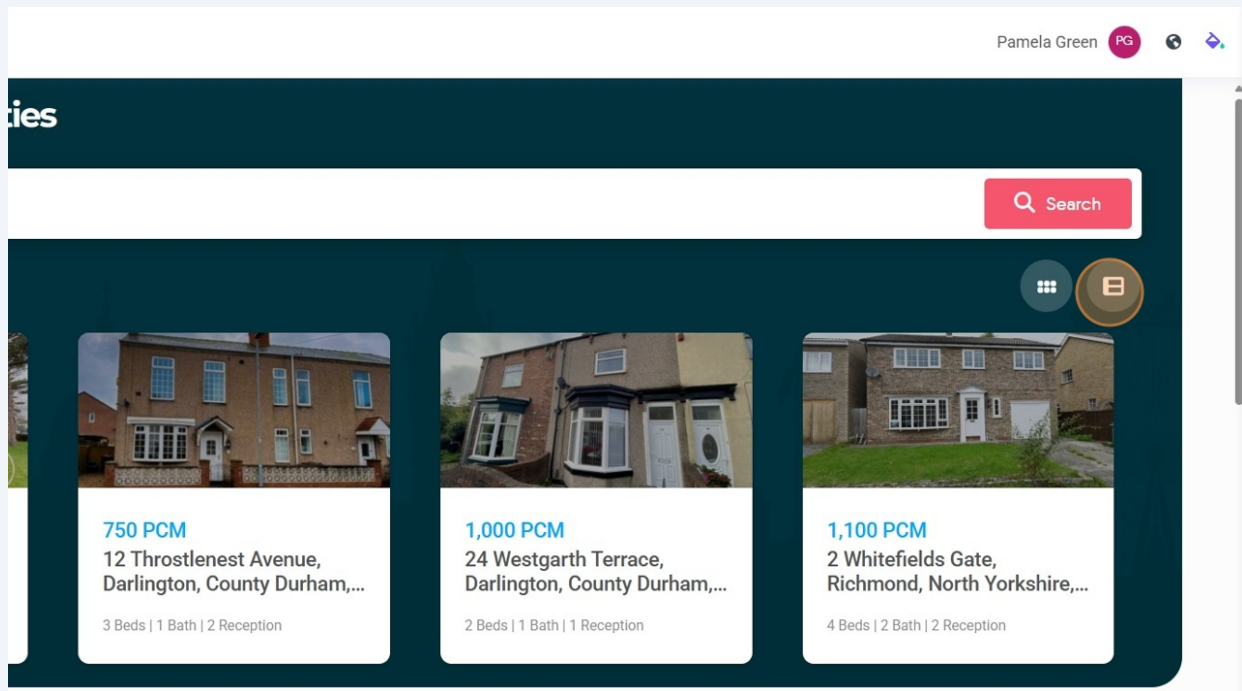


#### 5 You will then see a screen showing all properties controlled by the landlord.



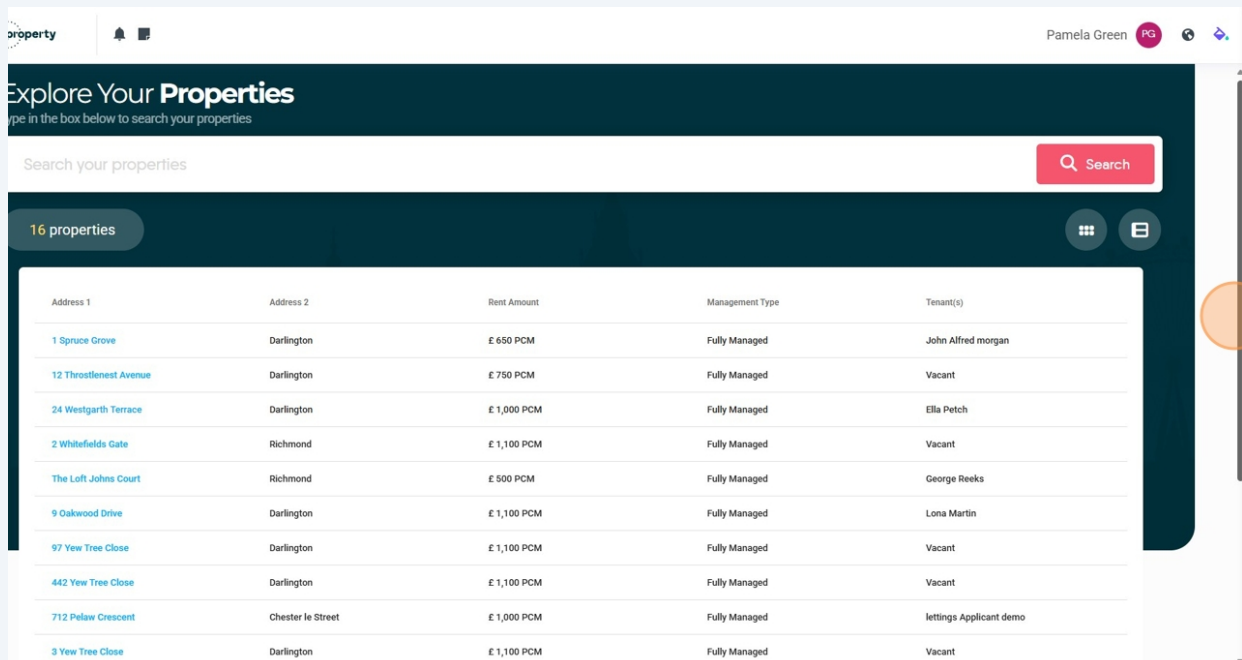
6

This screen can be displayed 2 ways. As tiles or click here

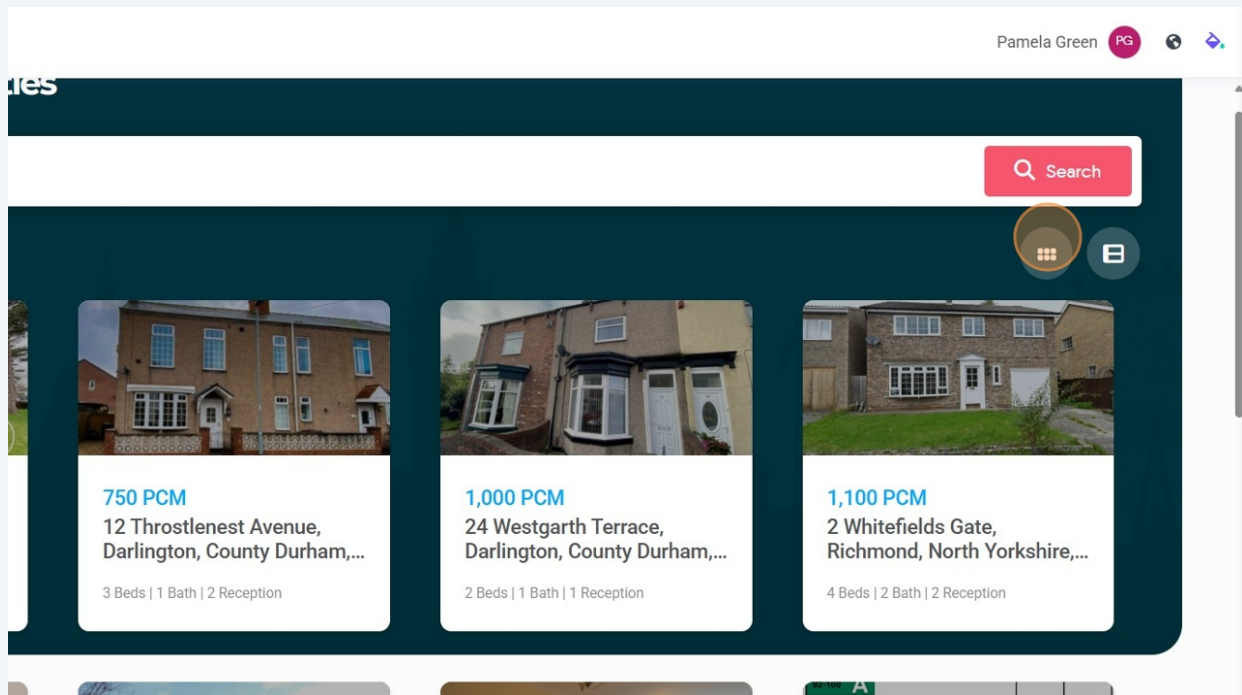


7

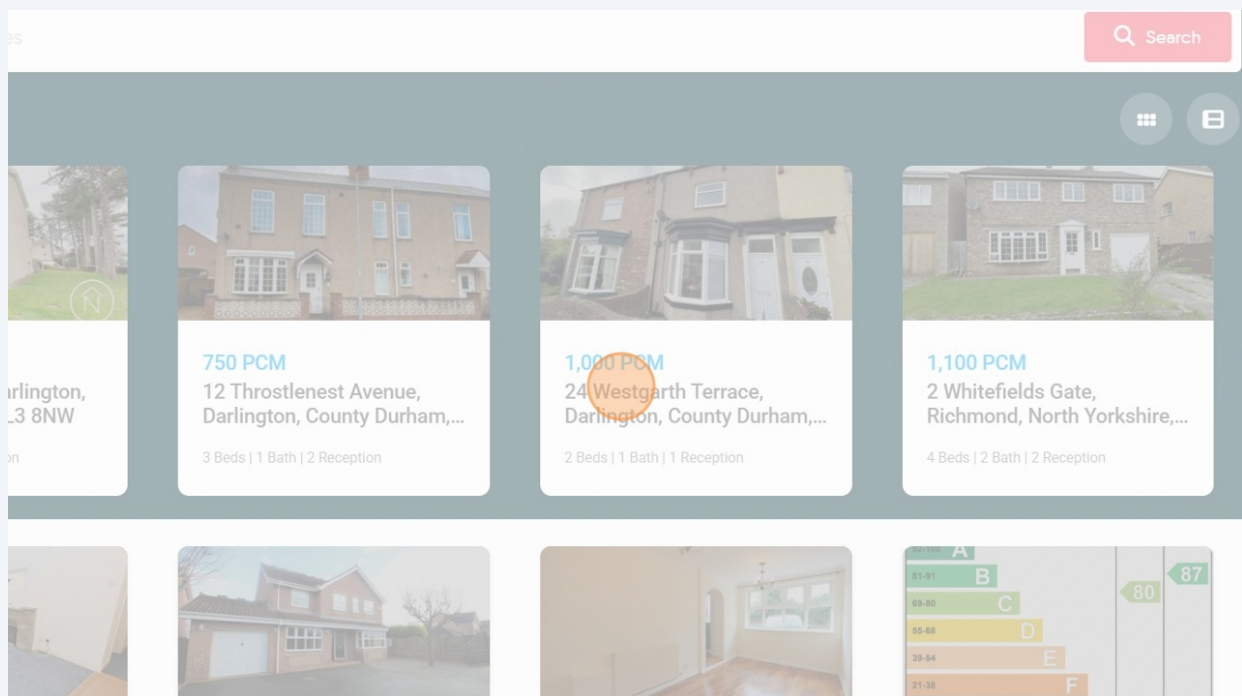
Or as a list of properties



8 Click here to swap back to the tile view.



9 Click onto a tile.





10

This will take you to a screen showing all the property details.

24 Westgarth Terrace, Darlington, County Durham, DL1 2LA | 2 1 | £1,000 PCM Let Agreed

**KEY FEATURES**

- 2 Reception Rooms
- Modern Kitchen
- Stunning Bathroom
- Spacious throughout.
- 2 Double Bedrooms

**FULL DESCRIPTION**

Key features

Zero Deposit Scheme Optional

Available In April

Two Reception Rooms

Spacious Throughout Modern Kitchen

Two Double Bedrooms

Stunning Bathroom

Outside SpaceCouncil

Tax Band A

EPC E

2 Reception Rooms

Modern Kitchen

Stunning Bathroom

Spacious throughout.

2 Double Bedrooms

**FULL DESCRIPTION**

Key features

Zero Deposit Scheme Optional

Available In April

Two Reception Rooms

Spacious Throughout Modern Kitchen

Two Double Bedrooms

Stunning Bathroom

Outside SpaceCouncil

Tax Band A

EPC E

Property description

\*\*\* ZERO DEPOSIT SCHEME AVAILABLE - STUNNING THROUGHOUT \*\*\* Do not miss out on this modern two bedroom home in a sought after area, Close to local shops, bus routes and the A66 for commuting. This lovely home even has the added bonus of an attic room.

Upon entering the property there is an entrance porch leading to the living room. The spacious

## 11 Click "Tenancies"

The screenshot shows the iarn property management dashboard. On the left is a dark sidebar with icons for EPC Rating, Home, Details, Tenancies (highlighted with an orange circle), Viewings, Compliance, and Journal. The main content area has a teal header with the property address: "24 Westgarth Terrace, Darlington, County Durham, DL1 2LA | 2 1 | £". Below the header, the 'Tenancies' tab is active, displaying a property picture of a two-story brick house. To the right of the picture are sections for 'KEY FEATURES' (2 Reception Rooms, Modern Kitchen, Stunning Bathroom) and 'FULL DESCRIPTION' (Key features, Zero Deposit Scheme Option, Available In April, Two Reception Rooms, Spacious Throughout Mode).

## 12 To see all the tenancies on the property, current, future and archived. These can be sorted using the drop down boxes or the filter options

This screenshot shows the 'Tenancies' section of the iarn property management interface. The teal header at the top displays the property address: "24 Westgarth Terrace, Darlington, County Durham, DL1 2LA | 2 1 | £ 1,000 PCM" with a "Let Agreed" button. Below the header, there are two main panels. The left panel contains a "Sort Tenancies" dropdown menu, a search bar, a "Clear filters" button, and a filter selection box with three options: "Live", "Prebooked", and "Archived". An orange arrow points to the "Live" option, and the word "Filters" is written below it. The right panel shows a "LIVE" status indicator, a circular "EP" (EPC) rating, the property name "Ella Petch, Dick Blyton", the rental price "£ 1,102.00 PCM", and the tenancy period "11/04/2023 - 10/04/2025".

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Click "Viewings". This screen will show all viewings for a property. Feedback on viewings can be seen from here

ian property

Pamela Green

EPC RATING E

24 Westgarth Terrace, Darlington, County Durham, DL1 2LA | 2 1 | £ 1,000

Let Agreed

DETAILS

TENANCIES

**VIEWINGS**

COMPLIANCE

JOURNAL

Sort Viewings

Search

Clear filters

Upcoming

Old Viewings

Booked

Chased

Cancelled

28 Apr 2023 11:00

AB

Anne Blyton

Feedback Received

30 Aug 2023 14:00

AB

Anne Blyton

Click here to view feedback

14

Click "Compliance" the Landlord can see the Safety Checks set against the property and the EPC.

ian property

Pamela Green

EPC RATING E

24 Westgarth Terrace, Darlington, County Durham, DL1 2LA | 2 1 | £ 1,000 PCM

Let Agreed

DETAILS

TENANCIES

VIEWINGS

**COMPLIANCE**

JOURNAL

SAFETY CHECKS

Fixed Wiring (EICR)

Oil Service

Prescribed Information

Responsibility: Contractor  
Due Date: 11/04/2028

Responsibility: Contractor  
Due Date: 28/12/2025

Responsibility: Agent  
Due Date: 11/04/2024

ENERGY EFFICIENCY

CURRENT

POTENTIAL

E

(39-54)

E

(39-54)

ENVIRONMENTAL IMPACT (CO<sub>2</sub>)

CURRENT

POTENTIAL

G

(1-20)

G

(1-20)

EPC

RRN NUMBER

EXPIRY DATE



15

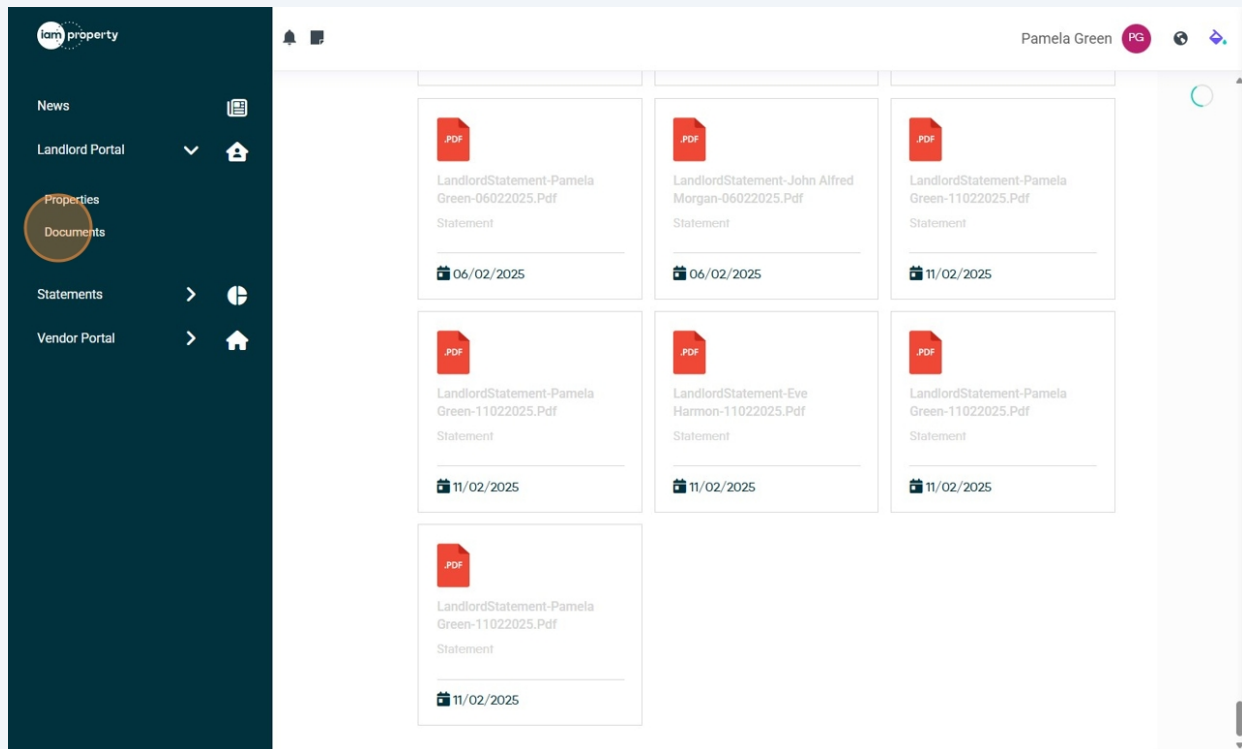
Click "Journal". This will show any Journal entries added to the property record that relate to Property Maintenance and any that are made public in the journal.

16

Journal entries can be searched and sorted by date range. Click the "Select date range" field or use the options.

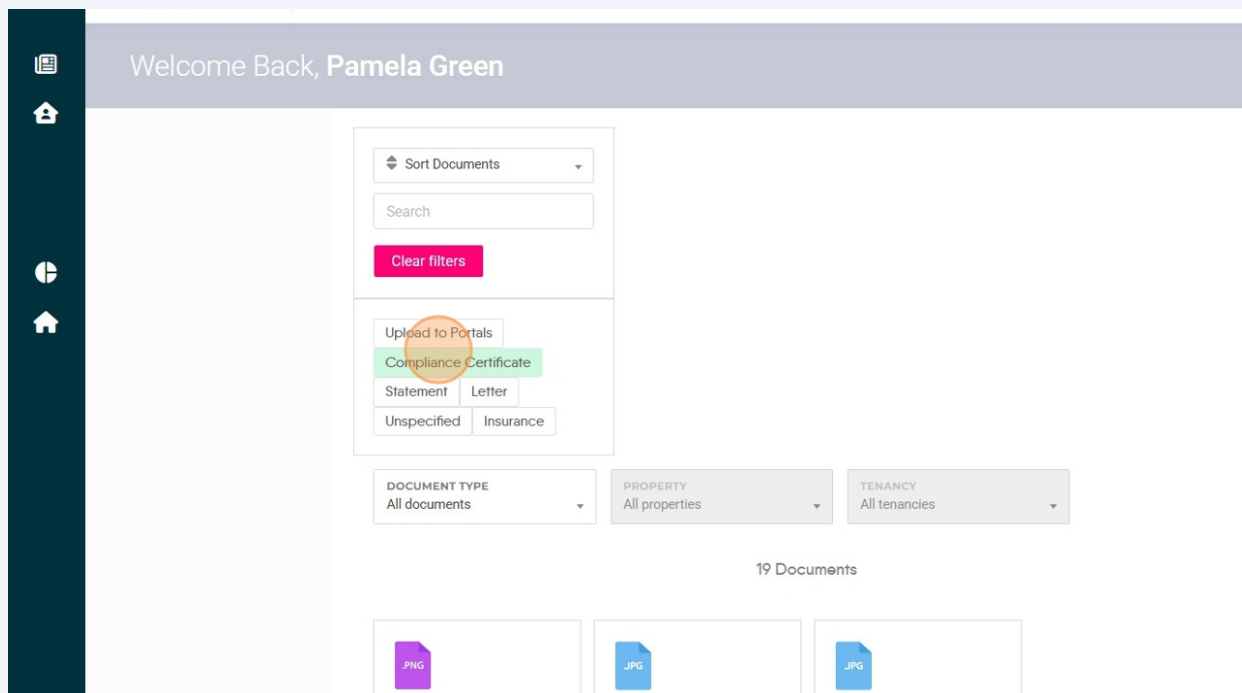
17

Click "Documents" this will show all the documents that have been uploaded to the property record and made available to the client portals.



18

They can also be sorted by type using the options towards the top of the screen . Click "Compliance Certificate" to sort and show only Compliance Certificates.



19

You can also Click into Document Types and select for the list to display only a specific type of document e.g. "My Landlord Documents"

The screenshot shows a web interface for document management. On the left is a dark sidebar with icons for home, a circular arrow, and another home icon. The main content area has a top filter section with a 'Sort Documents' dropdown, a 'Search' input, and a 'Clear filters' button. Below this is an 'Upload to Portals' section with buttons for 'Compliance Certificate', 'Statement', 'Letter', 'Unspecified', and 'Insurance'. A 'DOCUMENT TYPE' dropdown is highlighted with an orange circle and set to 'My Landlord Documents'. To its right are 'PROPERTY' and 'TENANCY' dropdowns, both set to 'All properties' and 'All tenancies' respectively. Below the document type dropdown is a list of document types: 'All documents', 'My Landlord Documents' (highlighted), 'My Property Documents', and 'My Tenancy Documents'. Below this list, a document titled 'aGreen19042023.Pdf' is shown with a 'Statement' label. To the right, a summary shows '56 Documents'. Below this, two document cards are visible, both titled 'LandlordStatementPamel aGreen19042023.Pdf' and 'LandlordStatementPamel aGreen06072023.Pdf', both with 'Statement' labels.

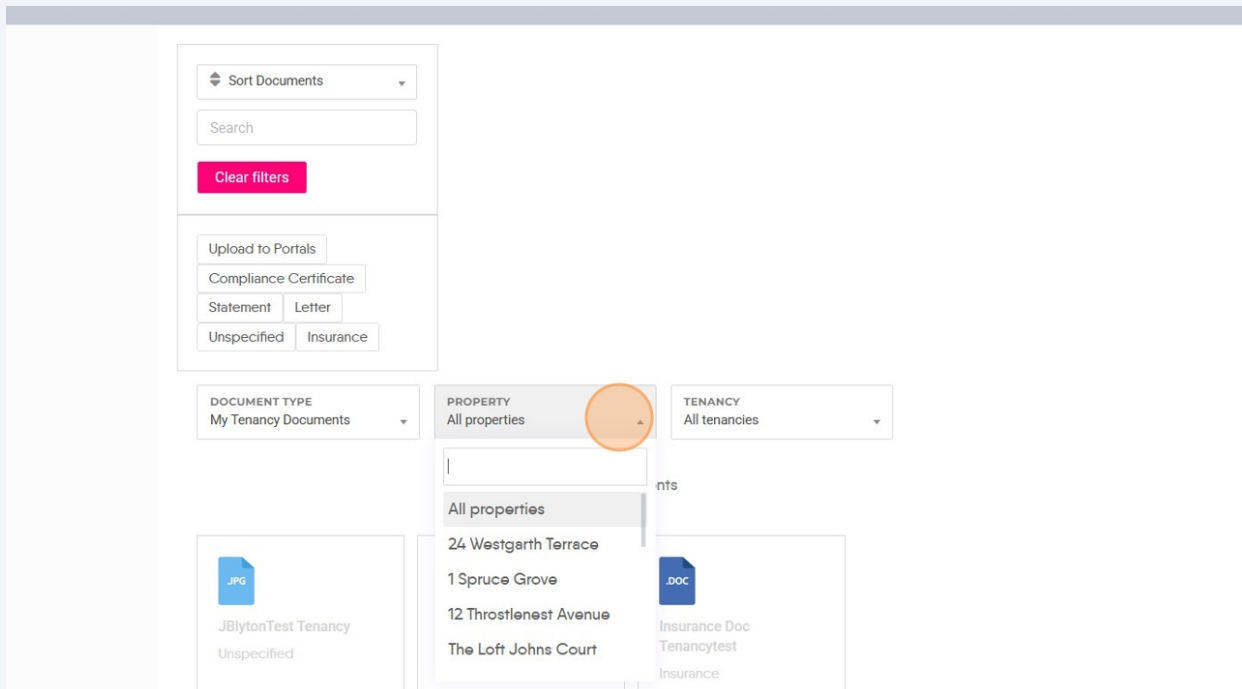
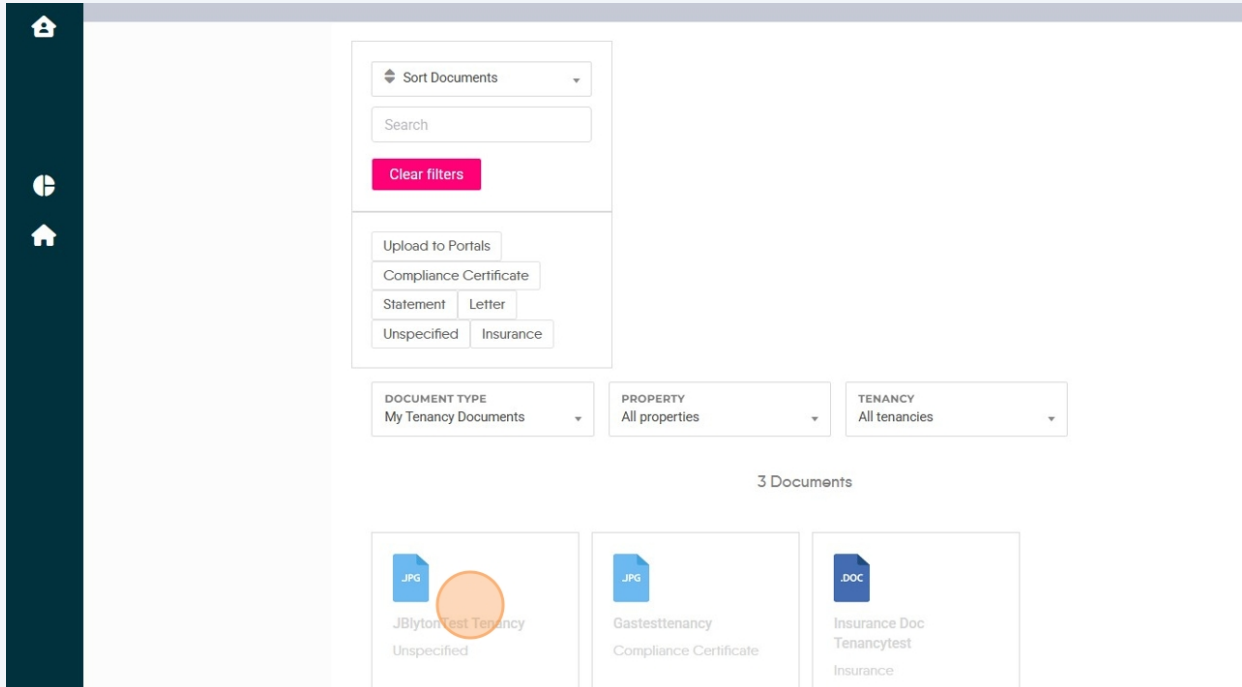
20

Click "My Property Documents" will show all documents or those for a particular property

The screenshot shows the same web interface as above, but with the 'DOCUMENT TYPE' dropdown set to 'My Property Documents'. The 'PROPERTY' and 'TENANCY' dropdowns remain set to 'All properties' and 'All tenancies' respectively. Below the document type dropdown, the list of document types is the same, but 'My Property Documents' is now highlighted. Below this list, a document titled 'aGreen19042023.Pdf' is shown with a 'Statement' label. To the right, a summary shows '108 Documents'. Below this, three document cards are visible: 'EIC Report Compliance Certificate' (with a purple icon), 'Gas Safety Compliance Certificate' (with a blue icon), and 'LandlordStatementEveHarrmon19042023.Pdf' (with a red icon) and 'Statement' label.

21

Click "My Tenancy Documents" to see the tenancy related documents. These can be sorted by property and tenancy.  
 Click "All properties"  
 Click a property name  
 Click "All tenancies"  
 Click on a Tenancy



Sort Documents

Search

Clear filters

Upload to Portals

Compliance Certificate

StatementLetter

UnspecifiedInsurance

DOCUMENT TYPE  
My Tenancy Documents

PROPERTY  
1 Spruce Grove

TENANCY  
All tenancies

0 Documents



Sort Documents

Search

Clear filters

Upload to Portals

Compliance Certificate

StatementLetter

UnspecifiedInsurance

DOCUMENT TYPE  
My Tenancy Documents

PROPERTY  
1 Spruce Grove

TENANCY  
All tenancies

0 Document

All tenancies

Miss Georgina Blyton



Sort Documents

Search

Clear filters

Upload to Portals

Compliance Certificate

Statement
Letter

Unspecified
Insurance

DOCUMENT TYPE
My Tenancy Documents

PROPERTY
1 Spruce Grove

TENANCY
Miss Georgina Blyton

0 Documents



## Statements

22

Landlords have the option to create a Statement for themselves, this is usually a standard property statement. Click "Statements"

iam property

News

Landlord Portal

Properties

Documents

Statements

Lettings

Vendor Portal

k, Pamela Green

Sort Documents

Search

Clear filters

Upload to Portals

Compliance Certificate

Statement
Letter

Unspecified
Insurance

DOCUMENT TYPE
My Tenancy Documents

PROPERTY
1 Spruce Grove

TENANCY
Miss Georgina Blyton

0 Documents

## 23 Click "Lettings"

The screenshot shows the ian property portal interface. On the left is a dark blue sidebar with the 'ian property' logo at the top. Below the logo are several menu items: 'News', 'Landlord Portal', 'Statements', 'Lettings' (which is highlighted with an orange circle), and 'Vendor Portal'. Each item has a corresponding icon. The main content area has a header with a bell icon, a user profile icon, and the name 'K, Pamela Green'. Below the header, there is a 'Sort Documents' dropdown menu, a search bar, and a pink 'Clear filters' button. Further down, there are buttons for 'Upload to Portals', 'Compliance Certificate', 'Statement', 'Letter', 'Unspecified', and 'Insurance'. At the bottom, there are three dropdown menus: 'DOCUMENT TYPE' (set to 'My Tenancy Documents'), 'PROPERTY' (set to '1 Spruce Grove'), and 'TENANCY' (set to 'Miss Georgina Blyton'). Below these filters, it says '0 Documents'.

## 24 Click here to select the report to produce.

The screenshot shows a 'PRODUCE REPORT' modal window. The modal has a dark blue header with the title 'PRODUCE REPORT' and a close button. Below the header, there is a 'SELECT REPORT' dropdown menu, which is highlighted with an orange circle. The dropdown is open, showing a search bar and a list of reports. The first report in the list is 'Landlord', and the second is 'Legacy Statement'. A red star icon is visible next to the 'SELECT REPORT' label.

- 25 Click "All Properties" and select the property you want to run the report for.

**PRODUCE REPORT** ✕

**SELECT REPORT** ★  
Legacy Statement ▼

**SELECT PROPERTY** ★  
All Properties ▲

|

Please enter 1 or more characters

14/01/2025 14/02/2025

Cancel Run Report

**PRODUCE REPORT** ✕

**SELECT REPORT** ★  
Legacy Statement ▼

**SELECT PROPERTY** ★  
All Properties ▲

wes

24 Westgarth Terrace, Darlington, County Durham, DL1 2LA, UK

14/01/2025 14/02/2025

Cancel Run Report

## 26 Click "Run Report"

The screenshot shows a 'PRODUCE REPORT' modal window with a dark blue header and a close button (X) in the top right corner. The form contains the following fields:

- SELECT REPORT**: A dropdown menu with 'Legacy Statement' selected. A red asterisk (\*) is in the top right corner.
- SELECT PROPERTY**: A dropdown menu with '24 Westgarth Terrace, Darlington, County Durham, DL1 2LA, UK' selected. A red asterisk (\*) is in the top right corner.
- INCLUDE RENT DUE**: A dropdown menu with 'No' selected.
- START DATE**: A text field containing '14/01/2025'.
- END DATE**: A text field containing '14/02/2025'.
- Buttons**: A 'Cancel' button and a 'Run Report' button. The 'Run Report' button is highlighted with an orange circle.

## 27 To change password or log out, click in the top right corner

The screenshot shows the top right corner of a web application. The user's name 'Pamela Green' and initials 'PG' are displayed next to a profile icon. A dropdown menu is open, showing the following options:

- My Account**: With a user icon.
- Change Password**: With a padlock icon.
- Log out**: With a power icon.

Below the menu, there are three property cards, each with a photo, a price, an address, and details:

- 750 PCM**: 12 Throstlenest Avenue, Darlington, County Durham, ...  
3 Beds | 1 Bath | 2 Reception
- 1,000 PCM**: 24 Westgarth Terrace, Darlington, County Durham, ...  
2 Beds | 1 Bath | 1 Reception
- 1,100 PCM**: 2 Whitefields Gate, Richmond, North Yorkshire, ...  
4 Beds | 2 Bath | 2 Reception

28 To log out, click "Log out"

