

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"

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
PGreen10

Password
.....

Remember me

[Forgot your password?](#)

[Sign in](#)



Your partner for today and tomorrow

At iamproperty we're developing everything you need under one roof, one supplier relationship. With a focus on growth and evolution, we will continue to grow and evolve with your agency, and free 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

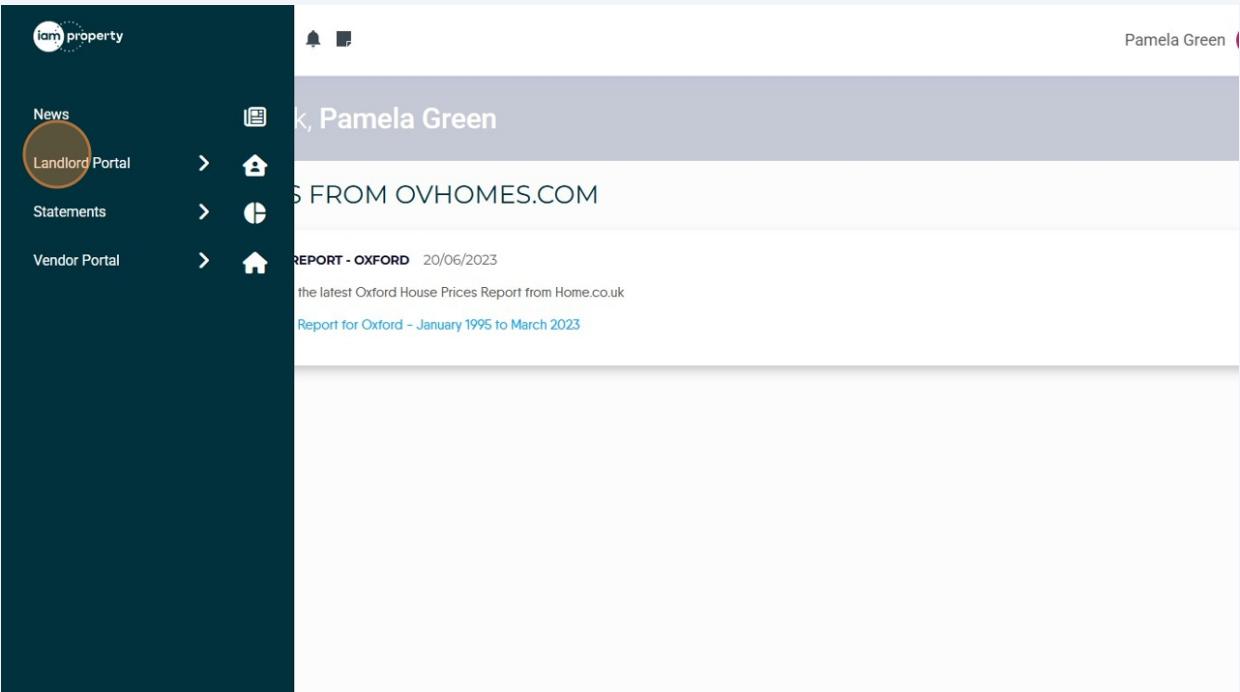
LATEST HOUSE PRICES REPORT - OXFORD 20/06/2023

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

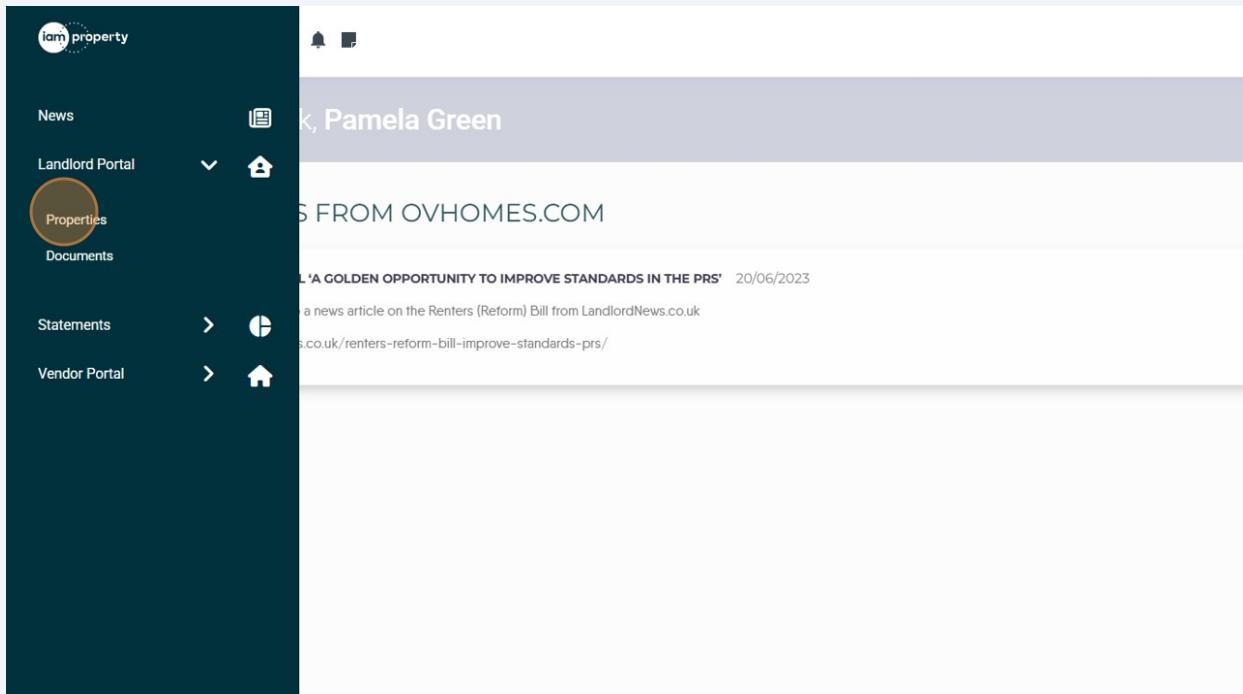
[Home.co.uk: House Prices Report for Oxford - January 1995 to March 2023](#)

X

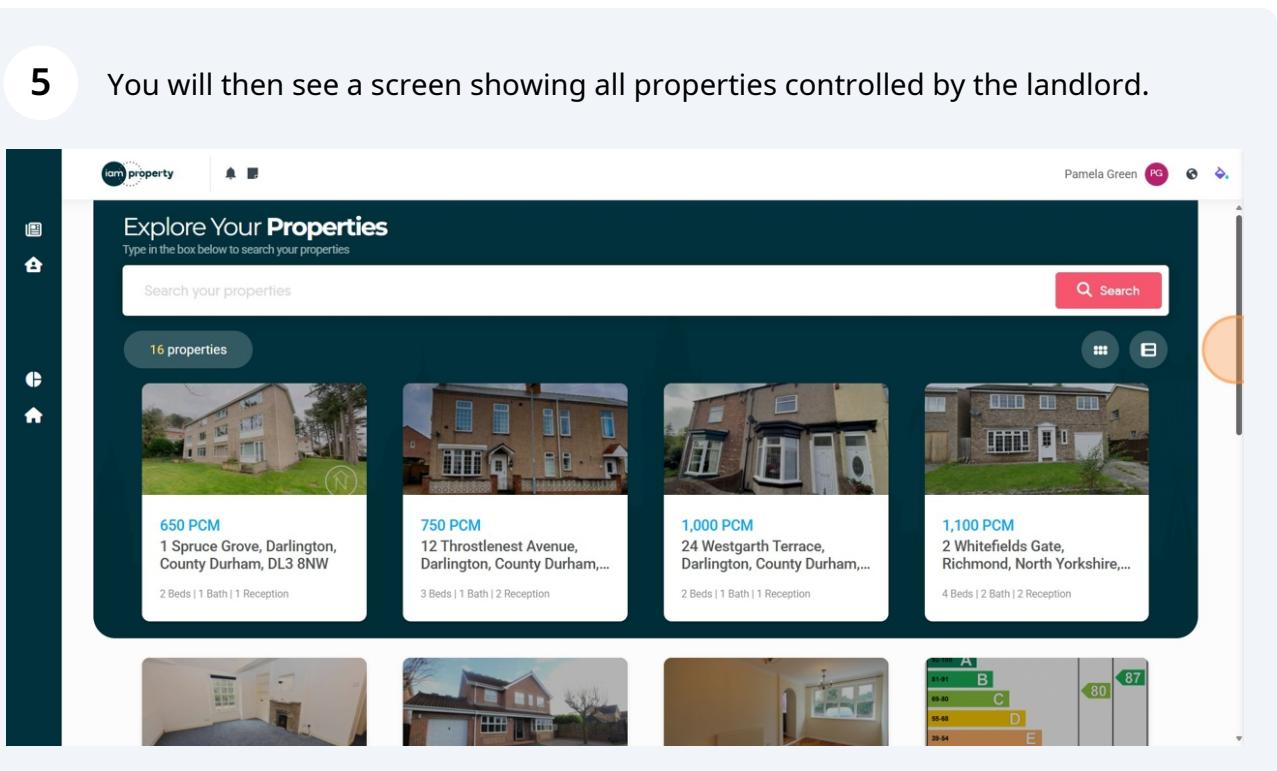
3 Click "Landlord Portal"



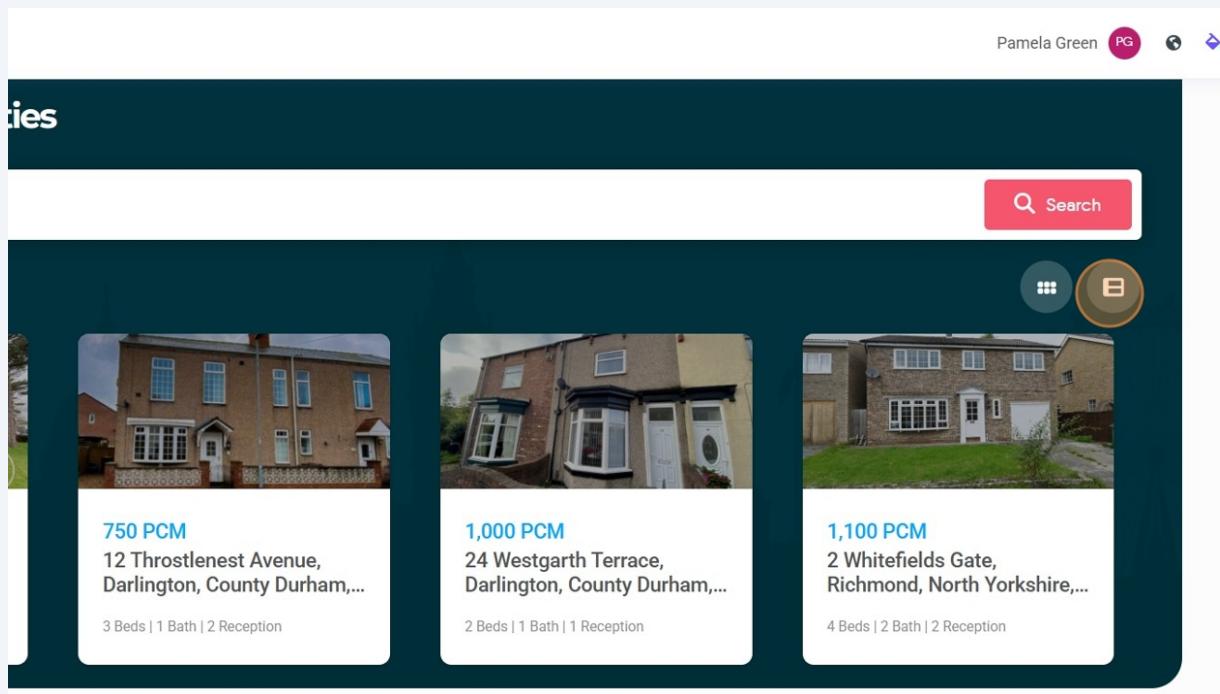
4 Click "Properties"



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



Pamela Green PG

ties

Search

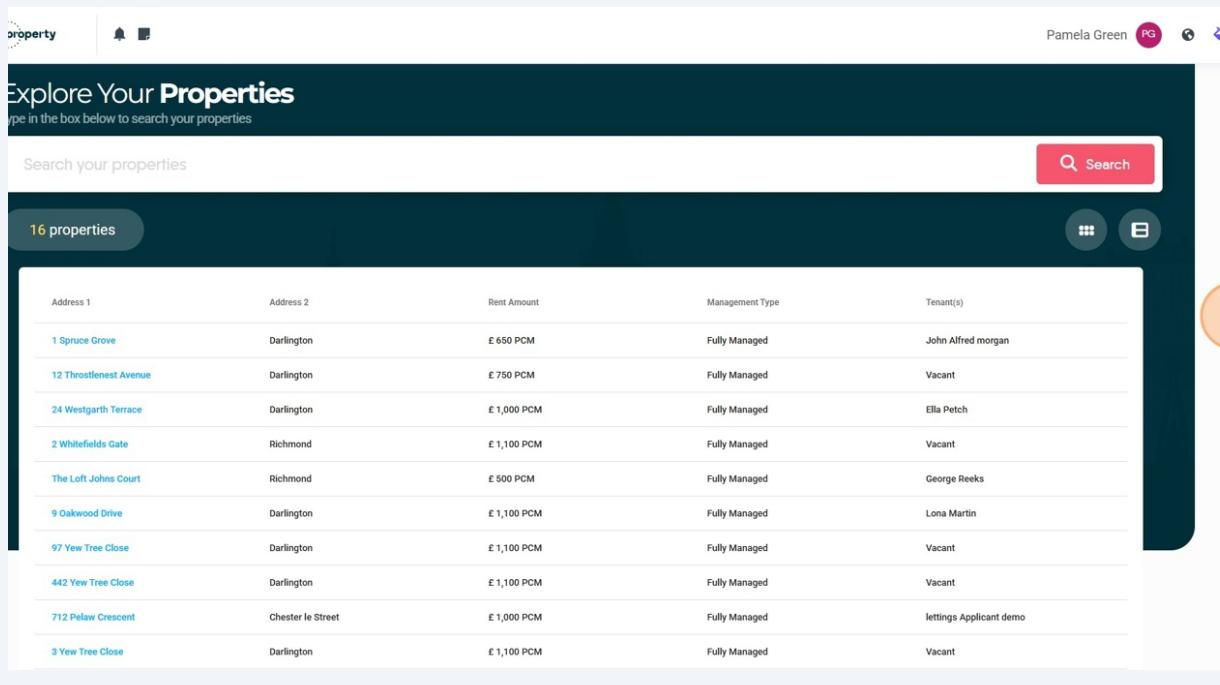
750 PCM
12 Throstlenest Avenue, Darlington, County Durham, ...
3 Beds | 1 Bath | 2 Reception

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

Three property tiles are displayed. Each tile shows a thumbnail image of a house, the rent amount, the address, and the number of bedrooms, bathrooms, and receptions. There are also filter and search icons at the top right.

7 Or as a list of properties



Explore Your Properties

Search your properties

16 properties

Address 1	Address 2	Rent Amount	Management Type	Tenant(s)
1 Spruce Grove	Darlington	£ 650 PCM	Fully Managed	John Alfred morgan
12 Throstlenest Avenue	Darlington	£ 750 PCM	Fully Managed	Vacant
24 Westgarth Terrace	Darlington	£ 1,000 PCM	Fully Managed	Ella Petch
2 Whitefields Gate	Richmond	£ 1,100 PCM	Fully Managed	Vacant
The Loft Johns Court	Richmond	£ 500 PCM	Fully Managed	George Reeks
9 Oakwood Drive	Darlington	£ 1,100 PCM	Fully Managed	Lona Martin
97 Yew Tree Close	Darlington	£ 1,100 PCM	Fully Managed	Vacant
442 Yew Tree Close	Darlington	£ 1,100 PCM	Fully Managed	Vacant
712 Pelaw Crescent	Chester le Street	£ 1,000 PCM	Fully Managed	lettings Applicant demo
3 Yew Tree Close	Darlington	£ 1,100 PCM	Fully Managed	Vacant

A list of 16 properties is shown in a table format. Each row contains the address, location, rent amount, management type, and tenant information. A search bar and a '16 properties' button are at the top of the list.

8 Click here to swap back to the tile view.

Pamela Green PG

Search

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

9 Click onto a tile.

Search

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

80 87

A	B
C	D
E	F

10

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

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

PROPERTY PICTURES **MAP VIEW**



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

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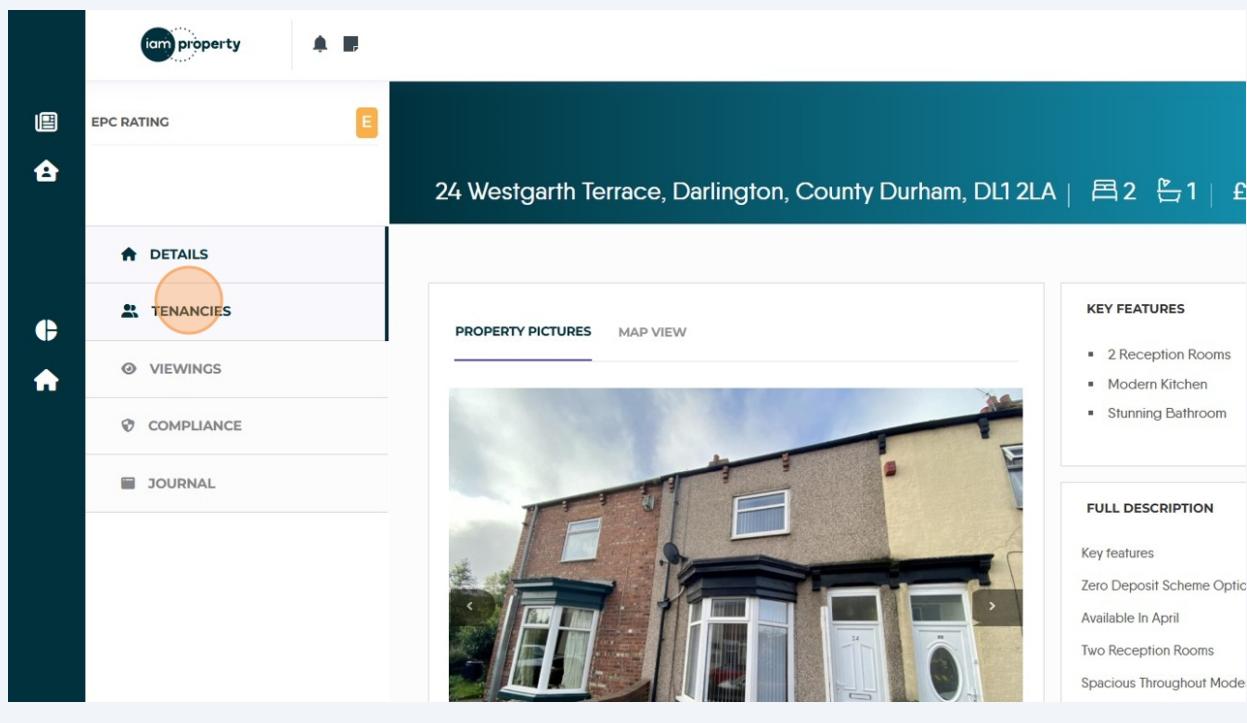
EPC E

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"



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

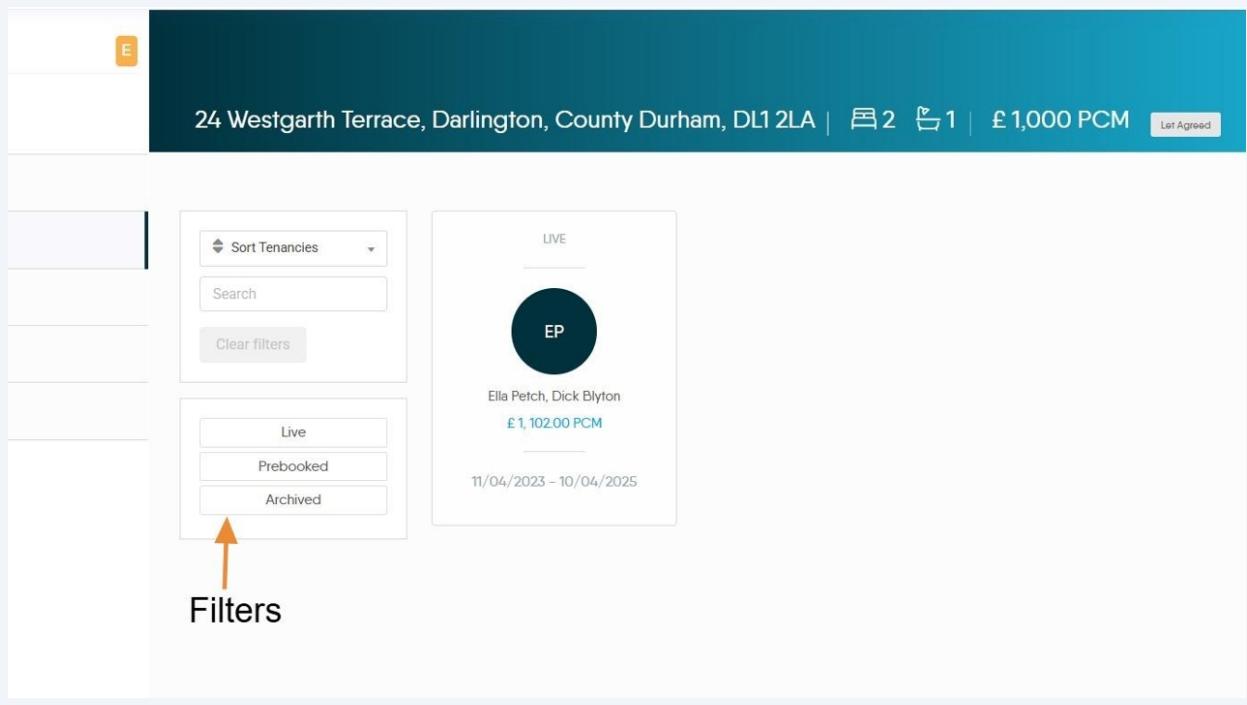
KEY FEATURES

- 2 Reception Rooms
- Modern Kitchen
- Stunning Bathroom

FULL DESCRIPTION

Key features
Zero Deposit Scheme Optic
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



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

LIVE

EP

Ella Petch, Dick Blyton
£ 1,102.00 PCM

11/04/2023 – 10/04/2025

Filters

13

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

Pamela Green

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

Let Agreed

EPC RATING: E

DETAILS

TENANCIES

VIEWINGS

COMPLIANCE

JOURNAL

Sort Viewings

Search

Clear filters

Upcoming

Old Viewings

Booked

Chased

Cancelled

28 Apr 2023 11:00

30 Aug 2023 14:00

AB

AB

Anne Blyton

Anne Blyton

Feedback Received

Click here to view feedback

14

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

Pamela Green PG

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

Let Agreed

EPC RATING: E

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: E (39-54)

POTENTIAL: E (39-54)

ENVIRONMENTAL IMPACT (CO₂)

CURRENT: G (1-20)

POTENTIAL: G (1-20)

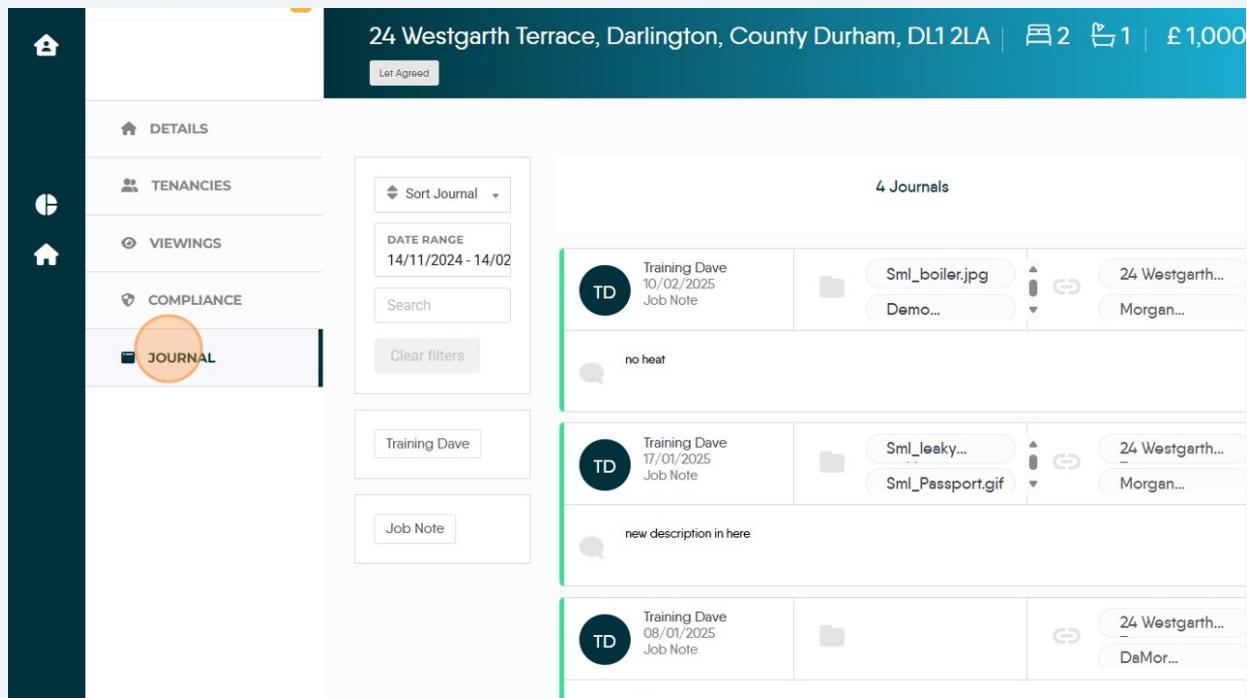
EPC

RRN NUMBER

EXPIRY DATE

15

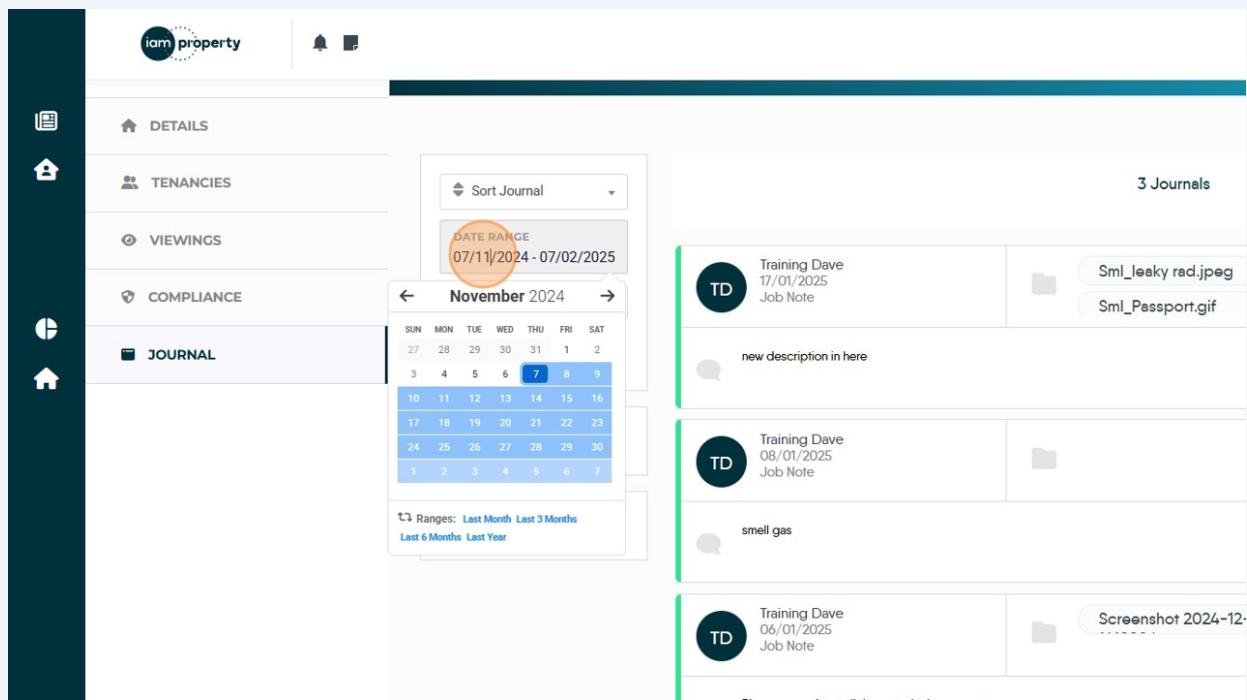
Click "Journal". This will show any Journal entries added to the property record that relate to Property Maintenance and any that are made public in the journal.



The screenshot shows the software interface for property management. The top bar displays the property address: "24 Westgarth Terrace, Darlington, County Durham, DL1 2LA" and the price: "£1,000". Below this, the "JOURNAL" tab is highlighted with an orange circle. The left sidebar includes tabs for "DETAILS", "TENANCIES", "VIEWINGS", "COMPLIANCE", and "JOURNAL". The "JOURNAL" section contains a "Sort Journal" dropdown, a "DATE RANGE" field set to "14/11/2024 - 14/02", a "Search" button, and a "Clear filters" button. To the right, a list of "4 Journals" is shown, each with a "TD" icon, the date, a brief description, and file attachments. The first entry is "Training Dave 10/02/2025 Job Note" with the note "no heat". The second entry is "Training Dave 17/01/2025 Job Note" with the note "new description in here". The third entry is "Training Dave 08/01/2025 Job Note" with the note "smell gas".

16

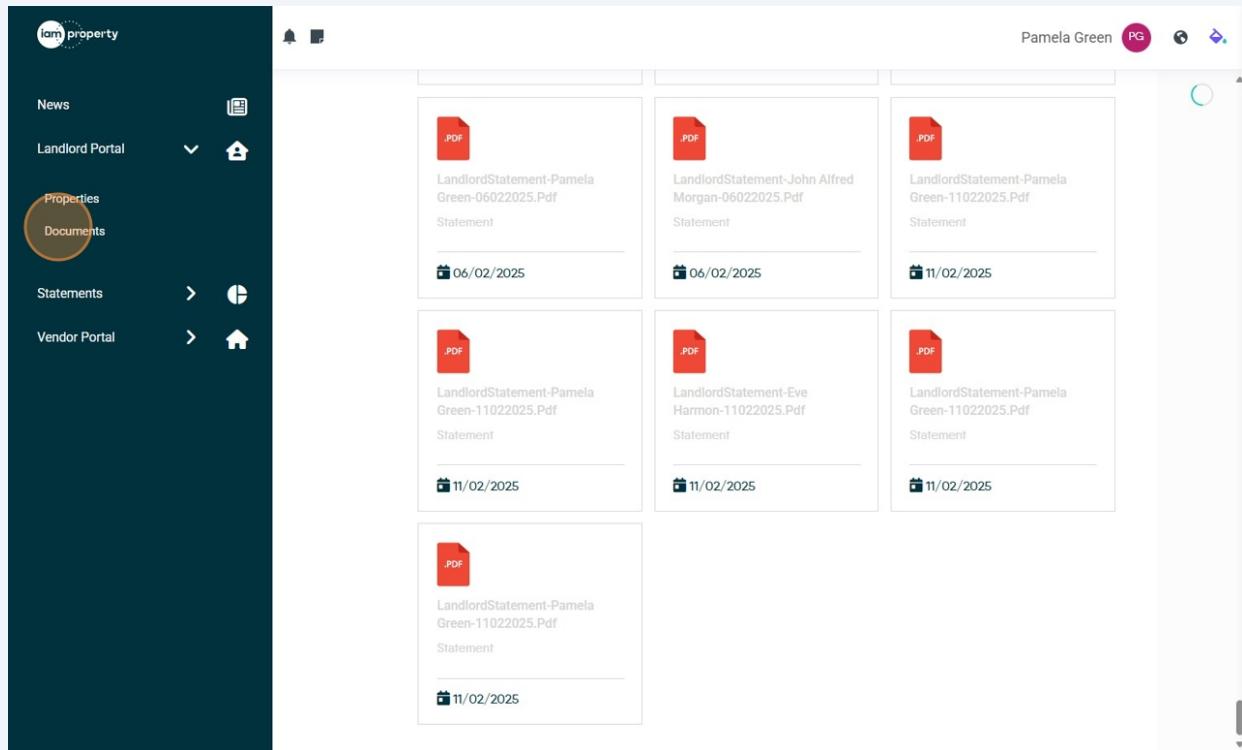
Journal entries can be searched and sorted by date range. Click the "Select date range" field or use the options.



The screenshot shows the software interface for property management. The top bar displays the property address: "24 Westgarth Terrace, Darlington, County Durham, DL1 2LA" and the price: "£1,000". Below this, the "JOURNAL" tab is highlighted with an orange circle. The left sidebar includes tabs for "DETAILS", "TENANCIES", "VIEWINGS", "COMPLIANCE", and "JOURNAL". The "JOURNAL" section contains a "Sort Journal" dropdown, a "DATE RANGE" field set to "07/11/2024 - 07/02/2025", and a calendar for November 2024. The calendar shows the date 07/11/2024 highlighted. Below the calendar, there are buttons for "Ranges: Last Month Last 3 Months Last 6 Months Last Year". To the right, a list of "3 Journals" is shown, each with a "TD" icon, the date, a brief description, and file attachments. The first entry is "Training Dave 17/01/2025 Job Note" with the note "new description in here". The second entry is "Training Dave 08/01/2025 Job Note" with the note "smell gas". The third entry is "Training Dave 06/01/2025 Job Note" with the note "Screenshot 2024-12-".

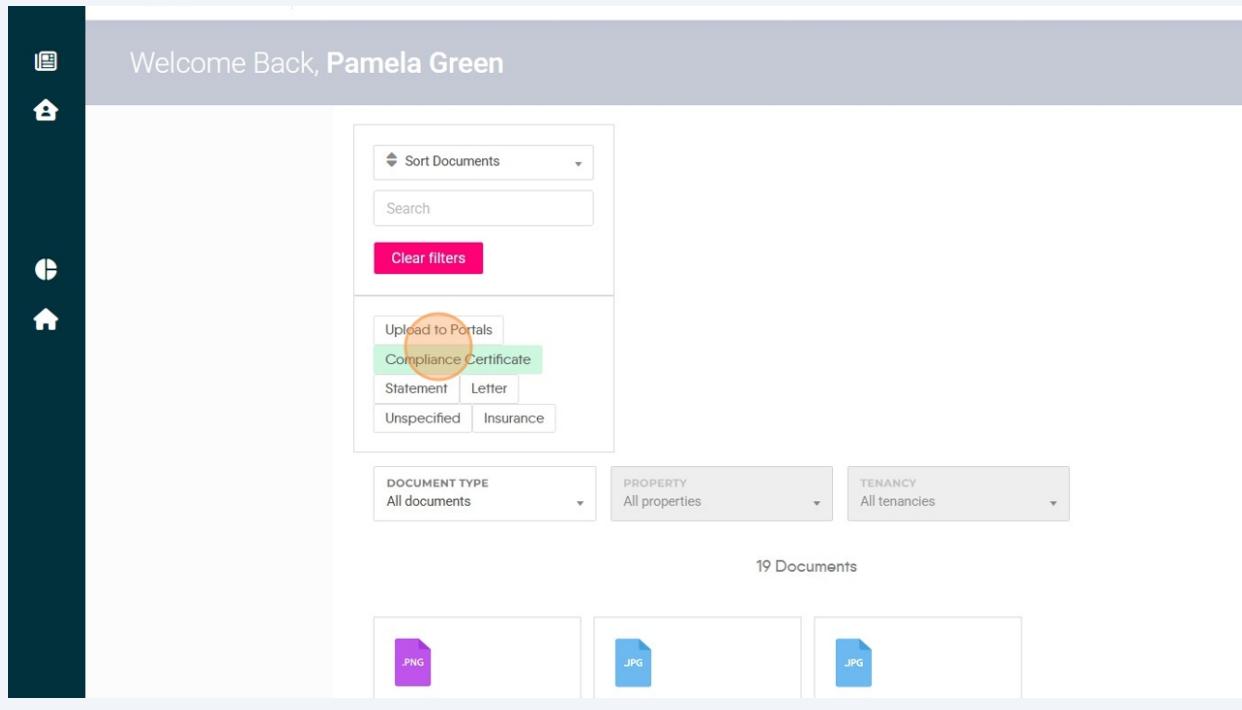
17

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



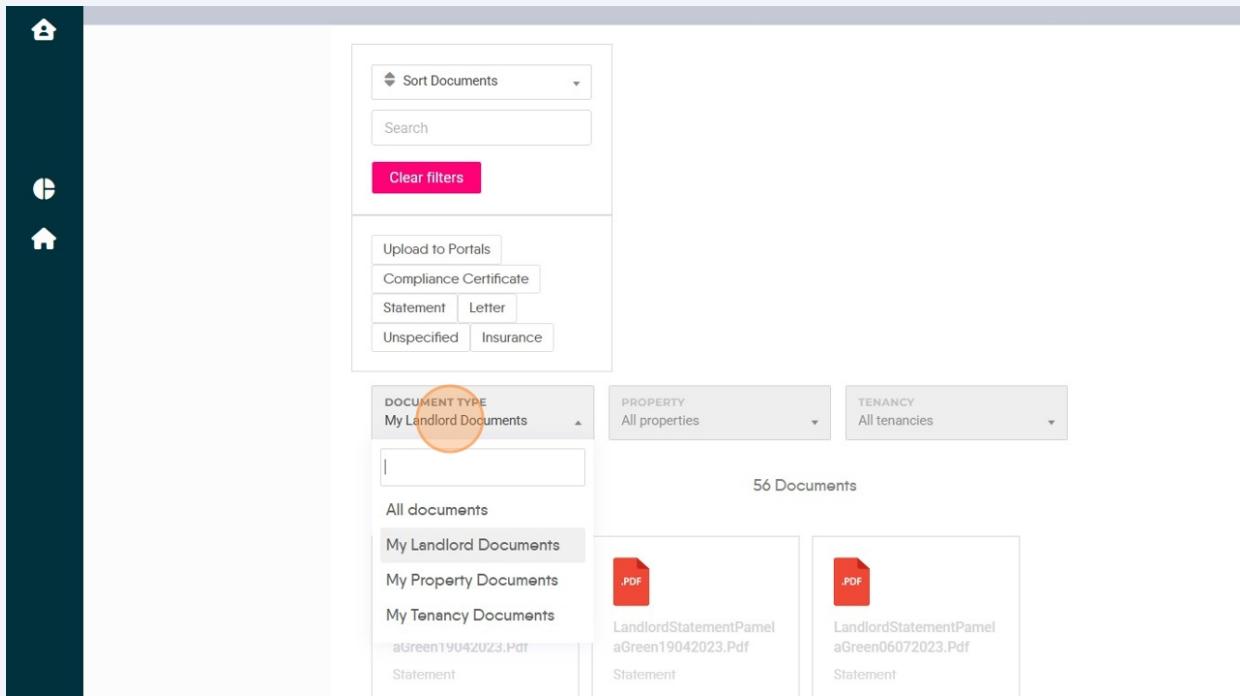
18

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

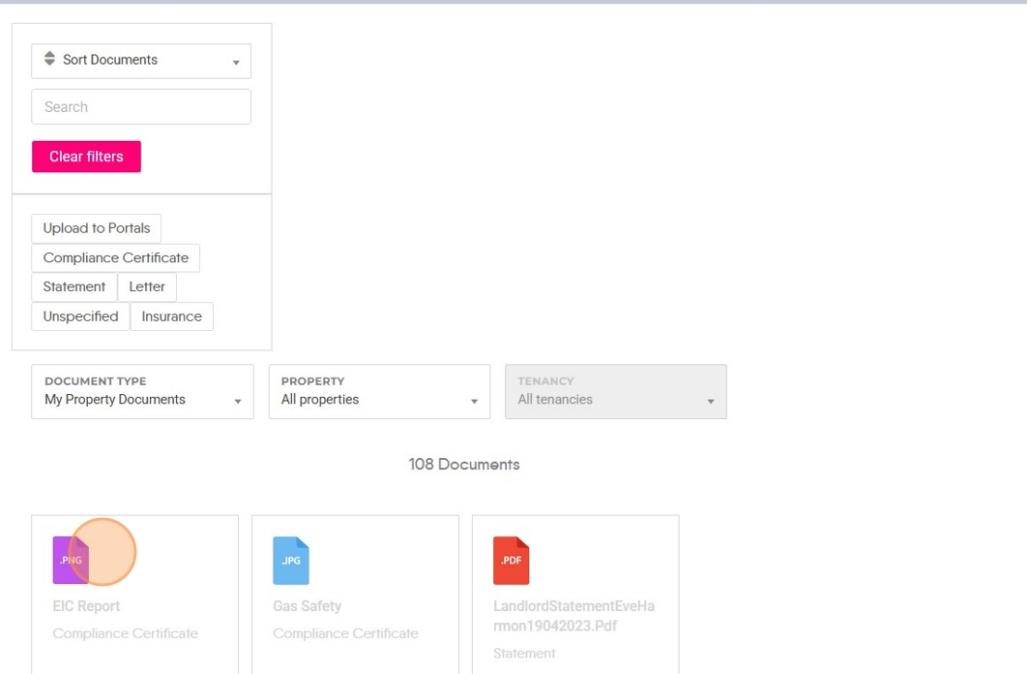
You can also Click into Document Types and select for the list to display only a specific type of document e.g. "My Landlord Documents"



The screenshot shows the software's document management interface. On the left, there are three navigation icons: a house, a circular arrow, and a home. The main area has a search bar with 'Sort Documents' and 'Search' buttons, and a 'Clear filters' button. Below this is a 'Upload to Portals' section with buttons for 'Compliance Certificate', 'Statement', 'Letter', 'Unspecified', and 'Insurance'. The 'DOCUMENT TYPE' dropdown is set to 'My Landlord Documents' and is highlighted with an orange circle. To the right are 'PROPERTY' and 'TENANCY' dropdowns, both set to 'All properties' and 'All tenancies'. Below these, a list of 'All documents' is shown, with 'My Landlord Documents' selected. The main content area displays 56 documents, with two examples shown: 'LandlordStatementPamel aGreen19042023.Pdf Statement' and 'LandlordStatementPamel aGreen06072023.Pdf Statement'. Each document is represented by a red PDF icon.

20

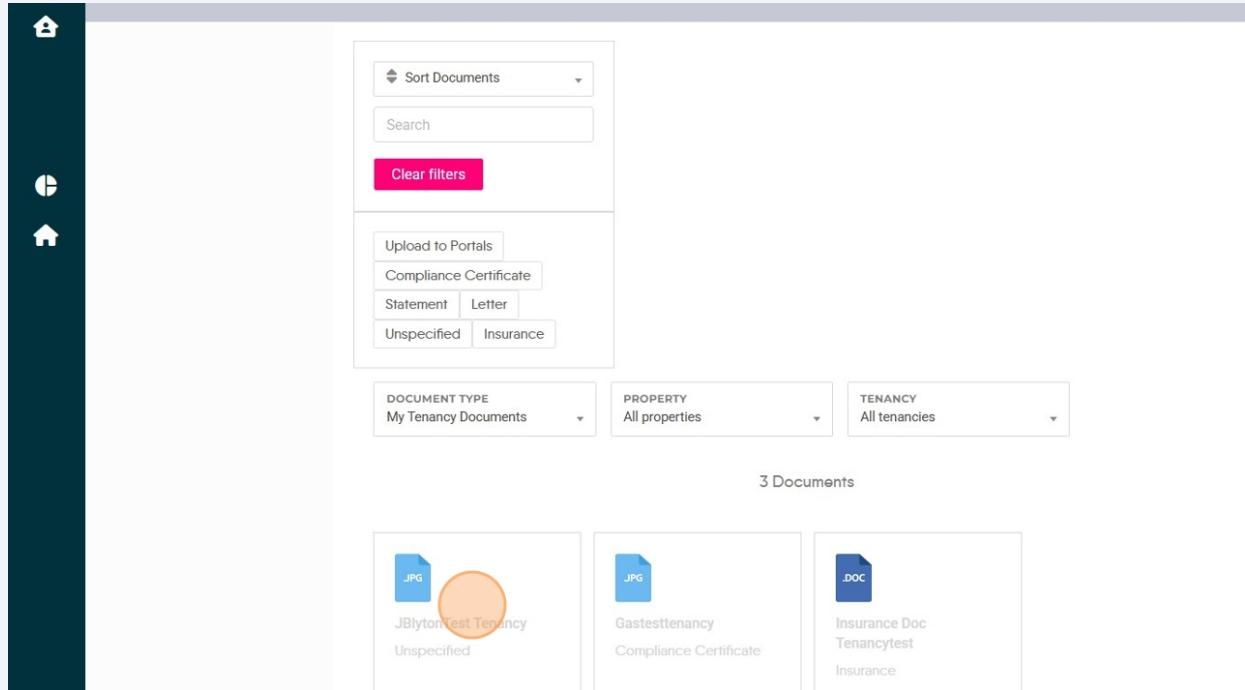
Click "My Property Documents" will show all documents or those for a particular property



The screenshot shows the software's document management interface. The navigation icons on the left are the same as the previous screenshot. The main area has a search bar with 'Sort Documents' and 'Search' buttons, and a 'Clear filters' button. Below this is a 'Upload to Portals' section with buttons for 'Compliance Certificate', 'Statement', 'Letter', 'Unspecified', and 'Insurance'. The 'DOCUMENT TYPE' dropdown is set to 'My Property Documents' and is highlighted with an orange circle. To the right are 'PROPERTY' and 'TENANCY' dropdowns, both set to 'All properties' and 'All tenancies'. Below these, a list of 'All documents' is shown, with 'My Property Documents' selected. The main content area displays 108 documents, with three examples shown: 'EIC Report Compliance Certificate' (represented by a purple and orange icon), 'Gas Safety Compliance Certificate' (represented by a blue icon), and 'LandlordStatementEveHa rmon19042023.Pdf Statement' (represented by a red PDF icon).

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

Statement Letter

Unspecified Insurance

DOCUMENT TYPE My Tenancy Documents

PROPERTY All properties

TENANCY All tenancies

3 Documents

JPG

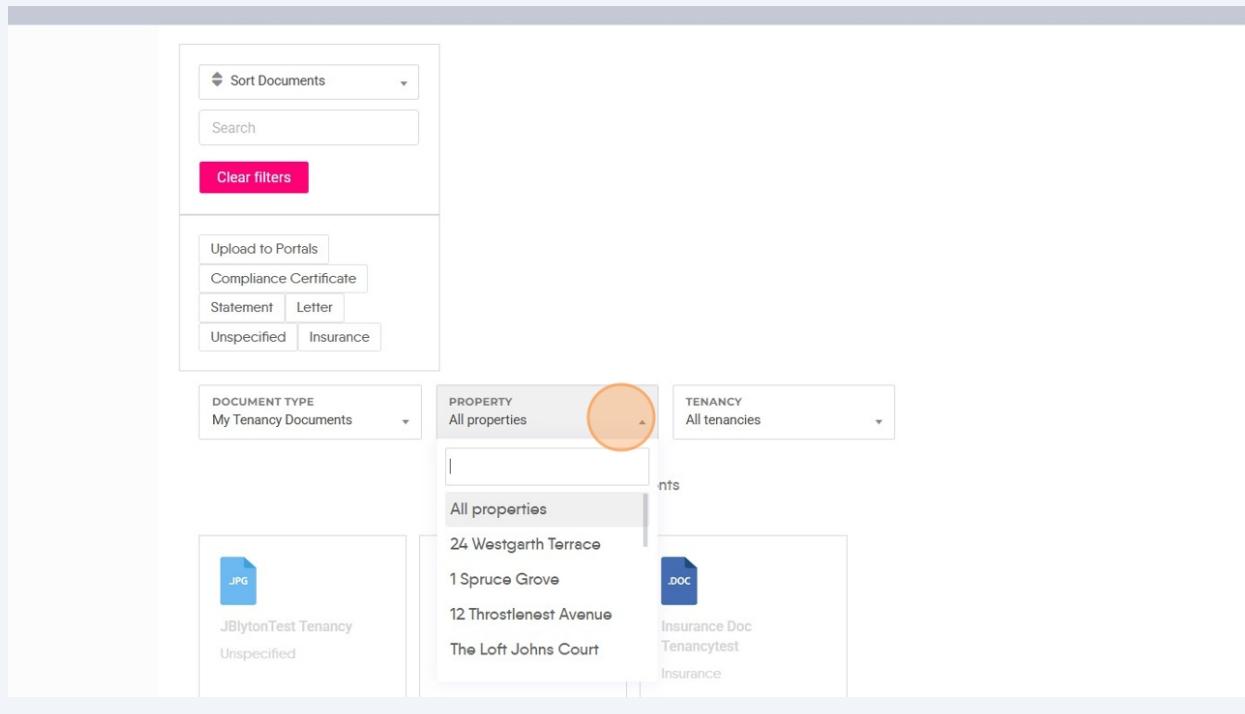
JBlytonTest Tenancy
Unspecified

JPG

Gastesttenancy
Compliance Certificate

.DOC

Insurance Doc
Tenancytest
Insurance



Sort Documents

Search

Clear filters

Upload to Portals

Compliance Certificate

Statement Letter

Unspecified Insurance

DOCUMENT TYPE My Tenancy Documents

PROPERTY All properties

TENANCY All tenancies

All properties

24 Westgarth Terrace

1 Spruce Grove

12 Throstlenest Avenue

The Loft Johns Court

JPG

JBlytonTest Tenancy
Unspecified

.DOC

Insurance Doc
Tenancytest
Insurance

Sort Documents ▾

Search

Clear filters

Upload to Portals

Compliance Certificate

Statement Letter

Unspecified Insurance

DOCUMENT TYPE
My Tenancy Documents ▾

PROPERTY
1 Spruce Grove ▾

TENANCY
All tenancies ▾

0 Documents



Sort Documents ▾

Search

Clear filters

Upload to Portals

Compliance Certificate

Statement Letter

Unspecified Insurance

DOCUMENT TYPE
My Tenancy Documents ▾

PROPERTY
1 Spruce Grove ▾

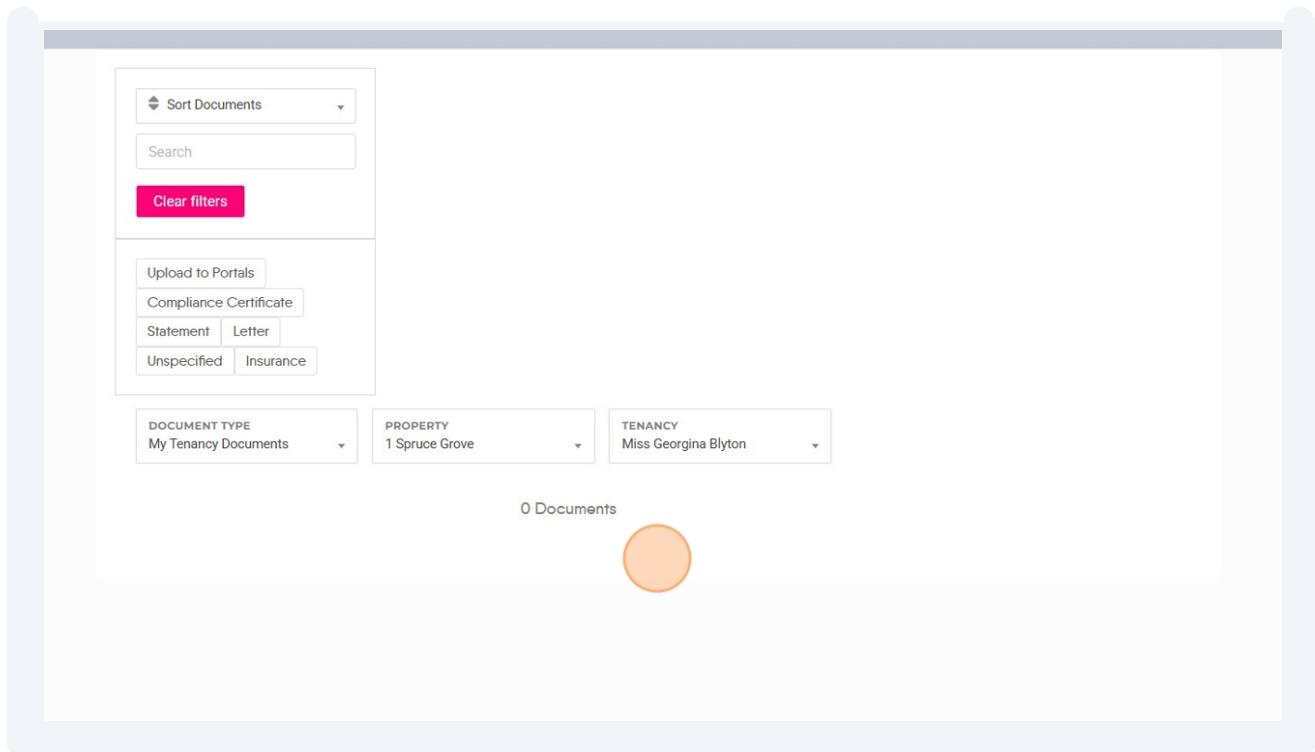
TENANCY
All tenancies ▾

0 Document



All tenancies

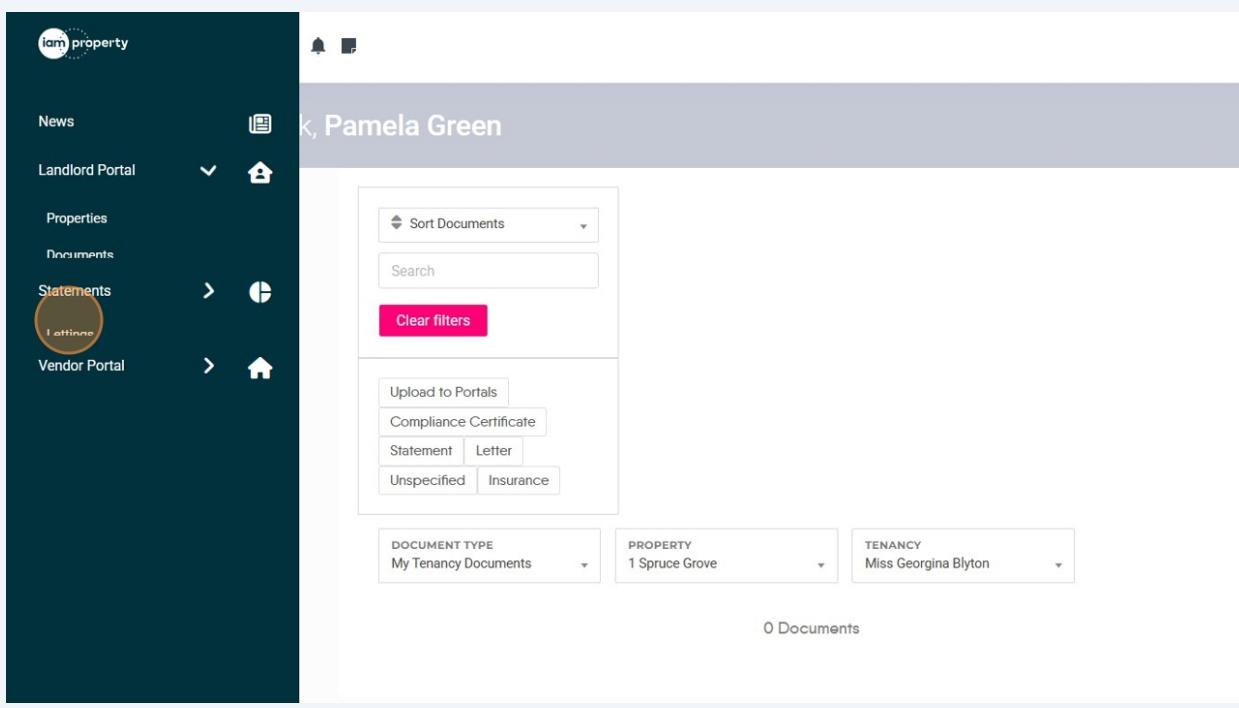
Miss Georgina Blyton



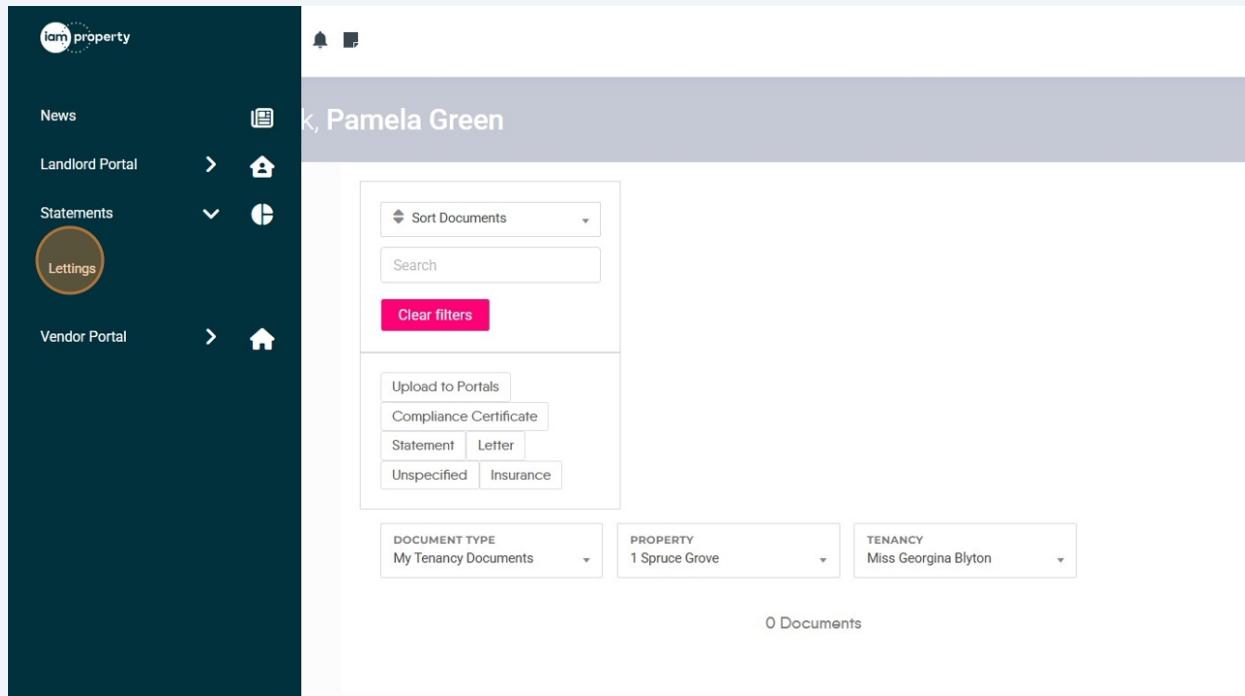
Statements

22

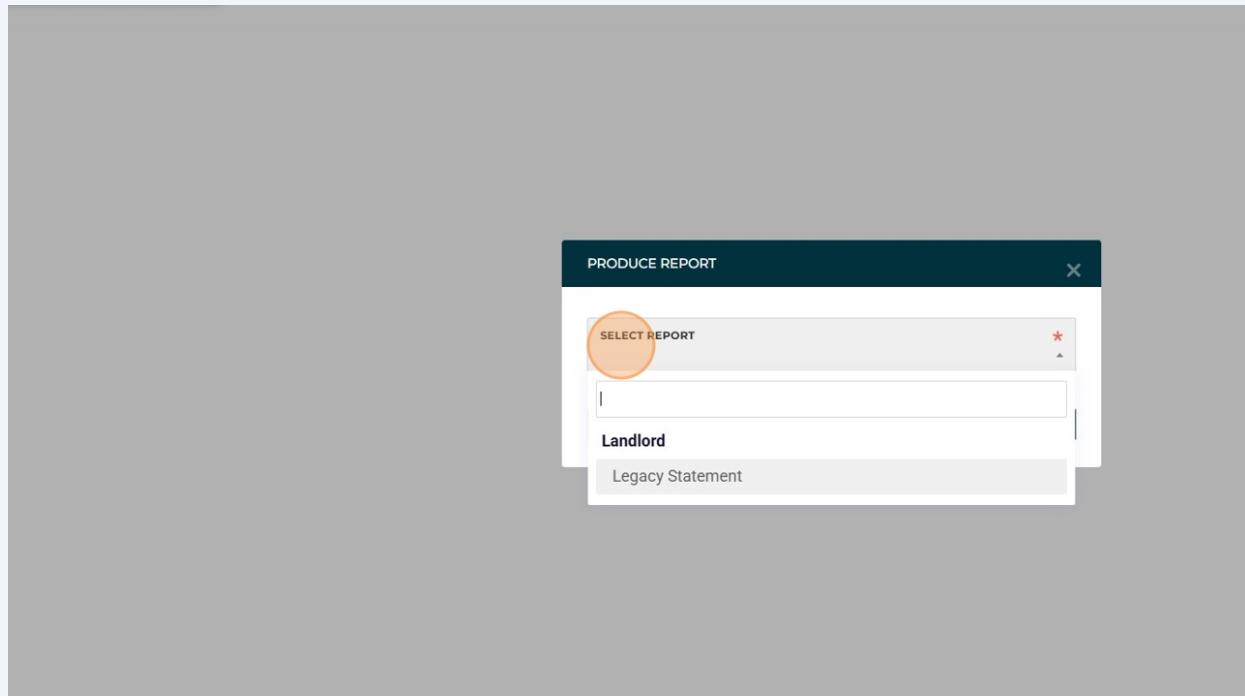
Landlords have the option to create a Statement for themselves, this is usually a standard property statement. Click "Statements"



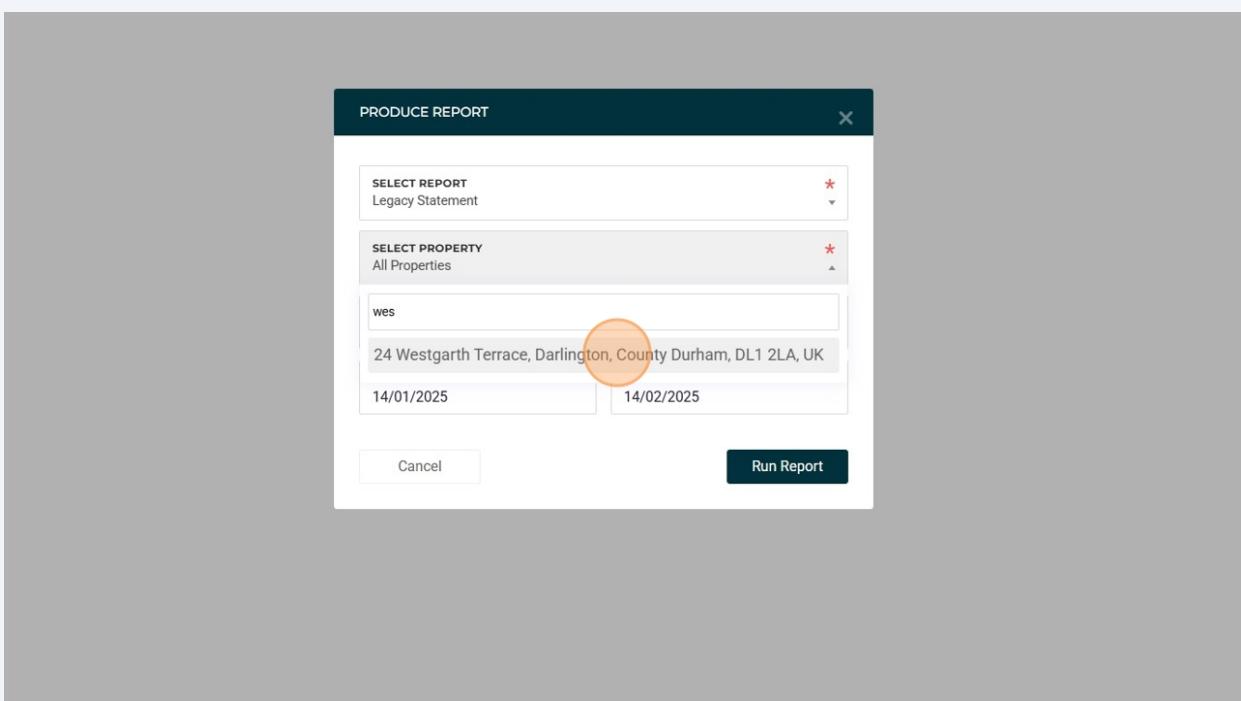
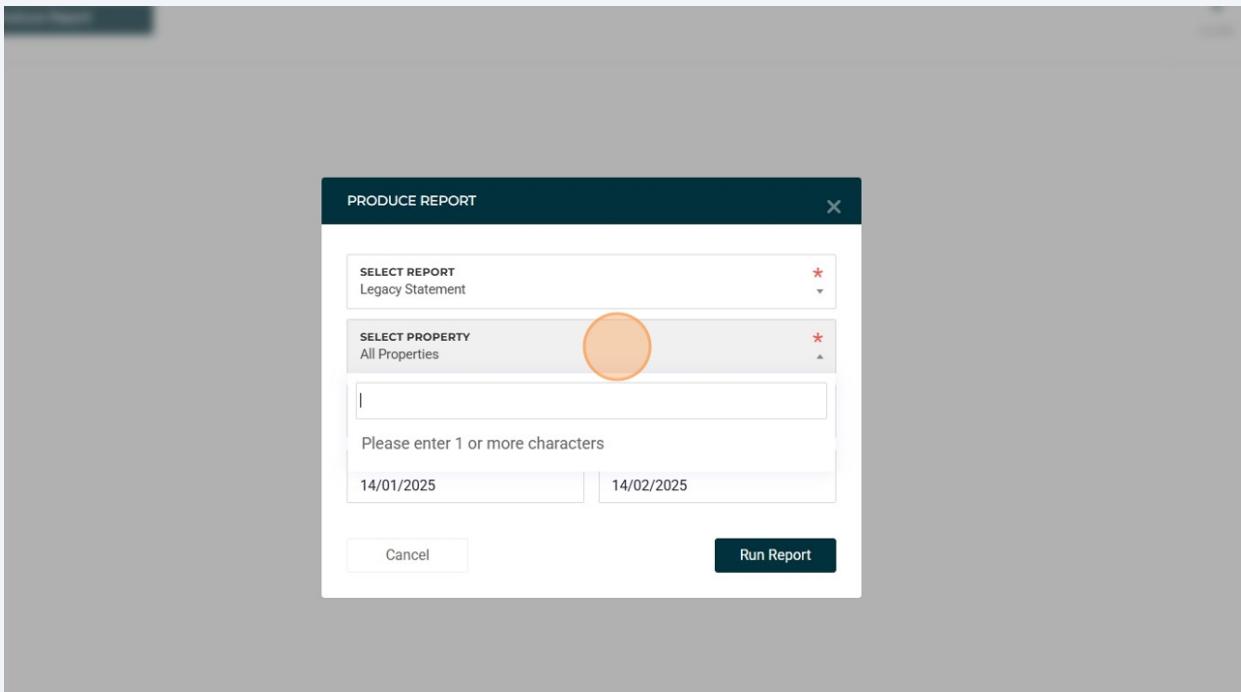
23 Click "Lettings"



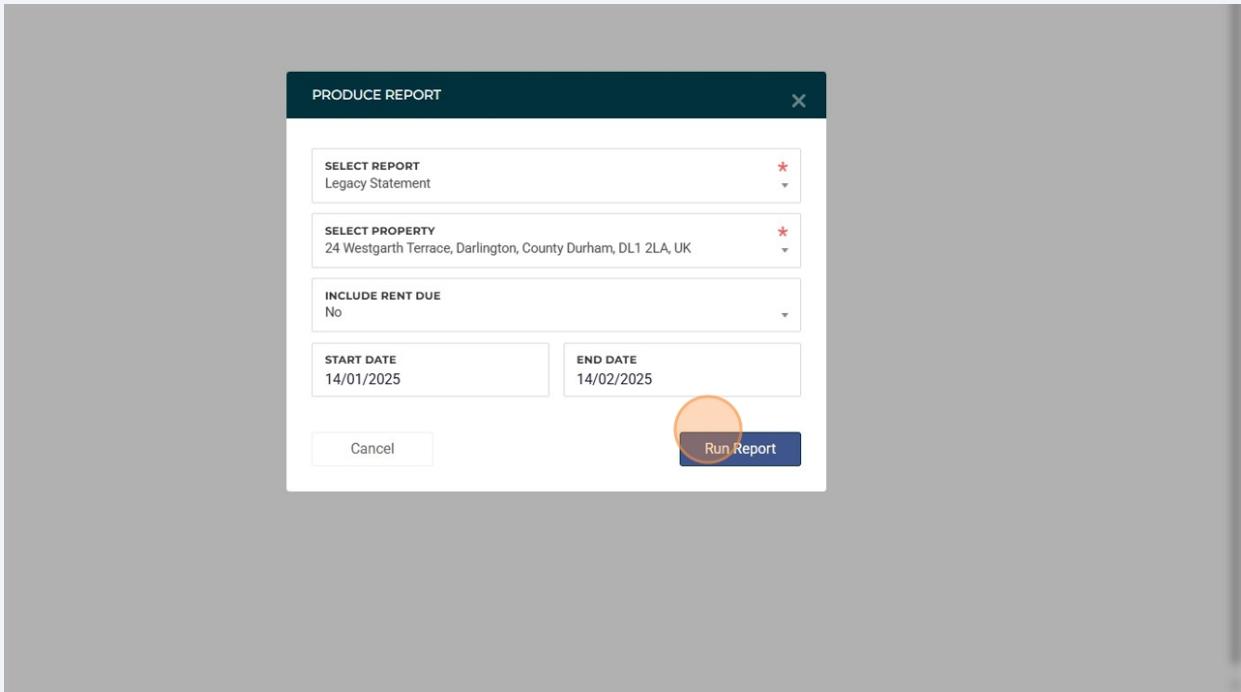
24 Click here to select the report to produce.



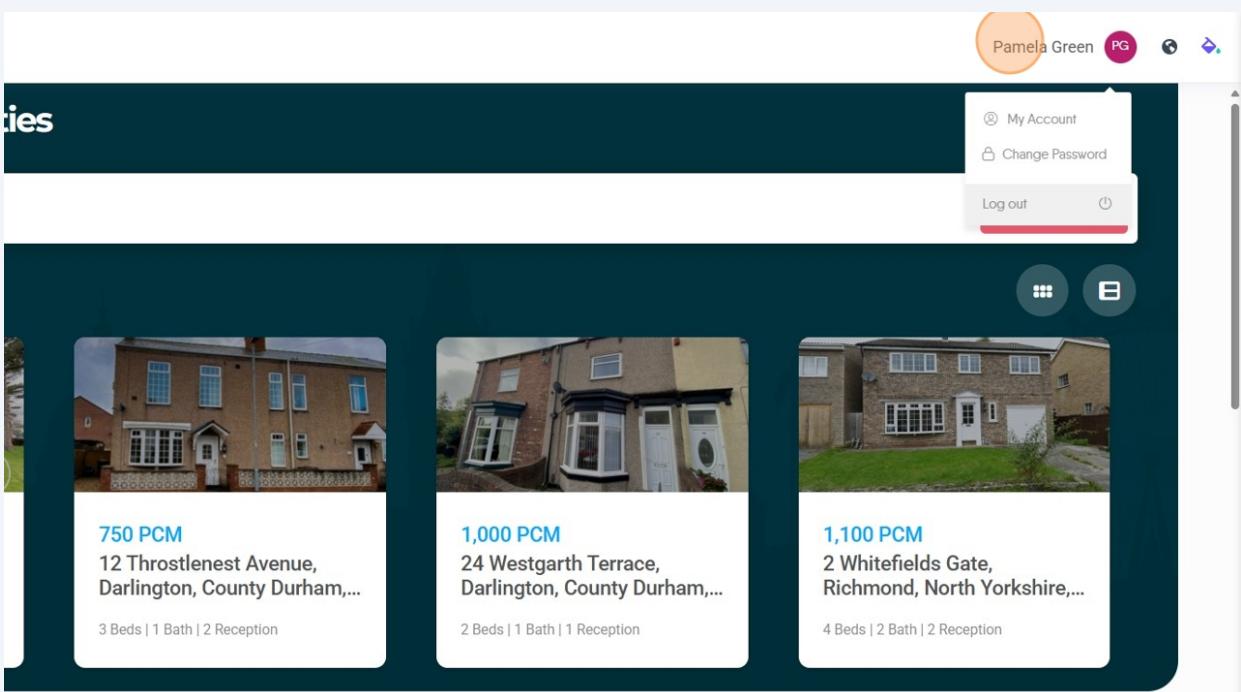
25 Click "All Properties" and select the property you want to run the report for.



26 Click "Run Report"



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



28 To log out, click "Log out"

The screenshot shows a user profile for 'Pamela Green' with a 'PG' icon. A dropdown menu is open, showing 'My Account', 'Change Password', and a highlighted 'Log out' button, which is circled in orange. Below the profile, there are three property listings:

- 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