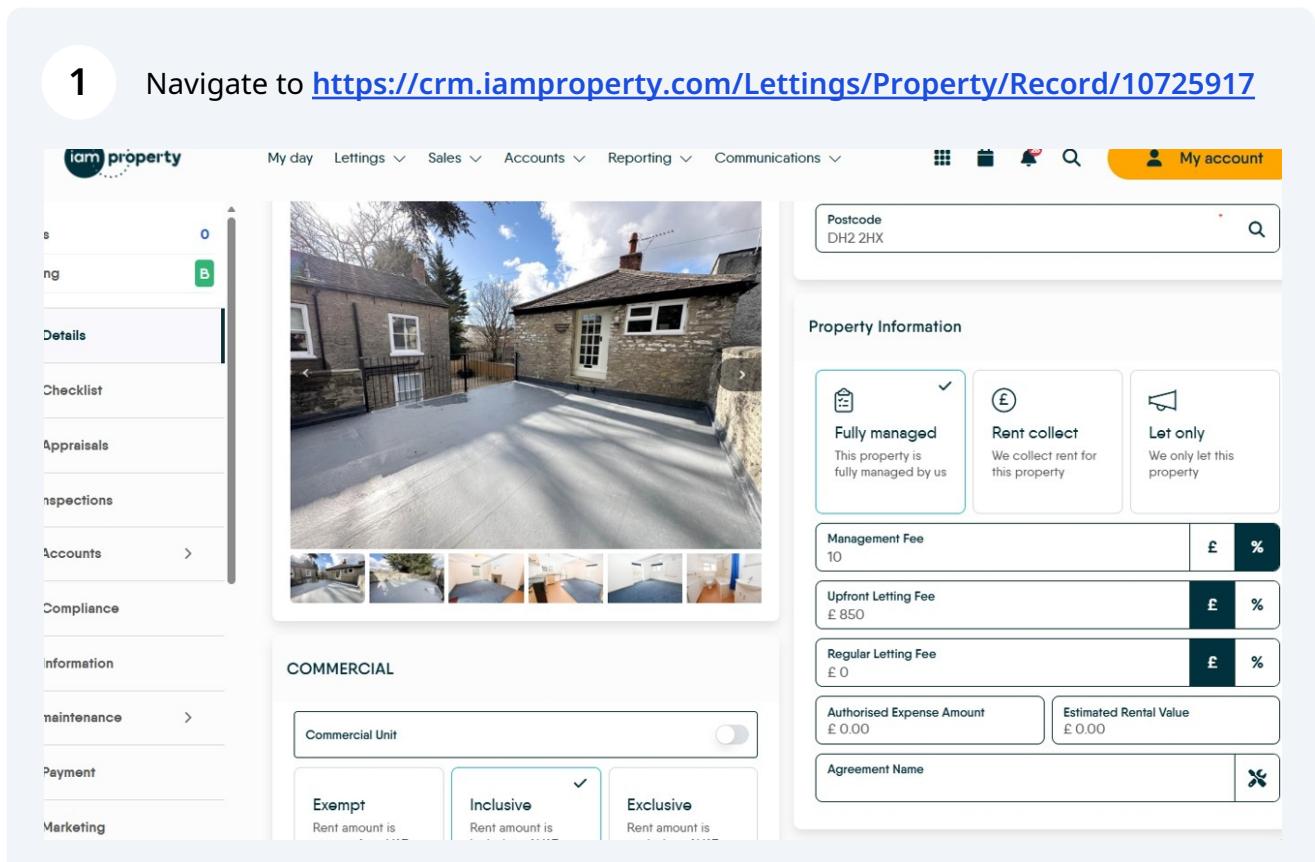# Managing Key Records in CRM

This guide provides a straightforward process for adding a key record to a property and logging that key In and Out of your offices. Ensuring that you can efficiently manage access and maintenance issues.

By following the steps outlined, you can easily document key details and any relevant notes, enhancing property management practices. It's an essential resource for anyone involved in property management, helping to streamline operations and improve communication regarding property access.

Adding a Key Record to a Property

1   Navigate to **https://crm.iamproperty.com/Lettings/Property/Record/10725917**

2   Click **"Key Control"**

3   Click **"Add Key"**

4 Click this text field and add a **"Key Number"**
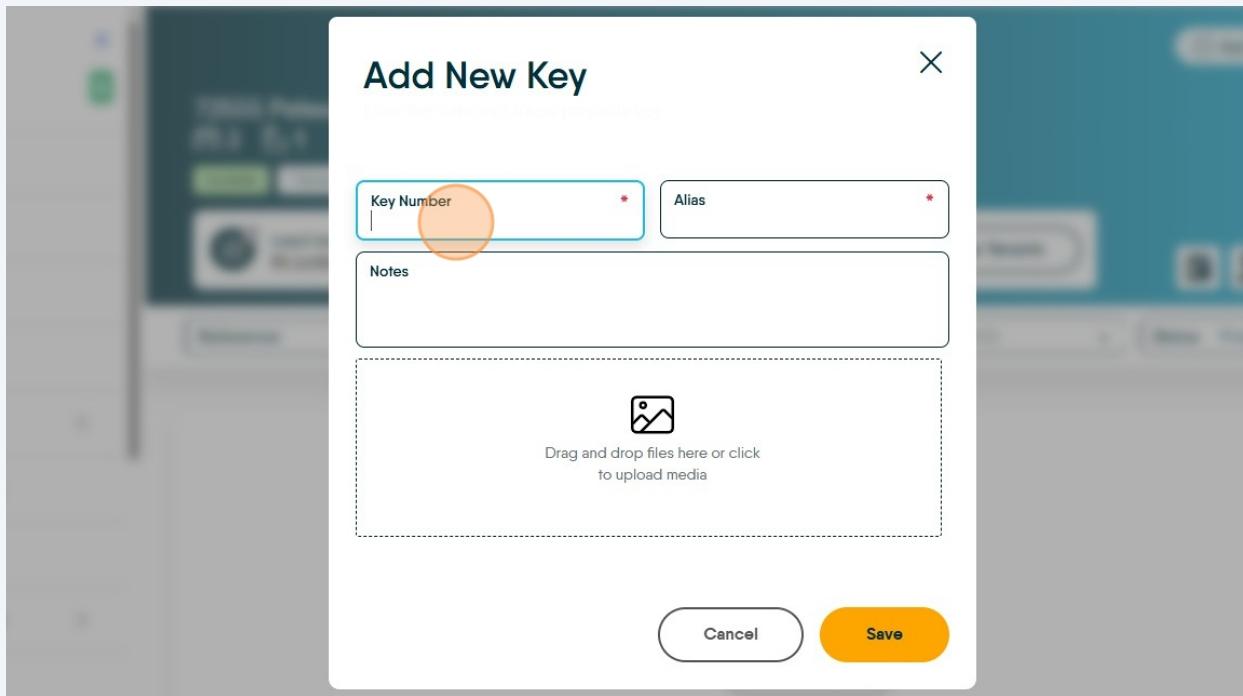
5 Click this text field add an **'Alias'** (description) for the key
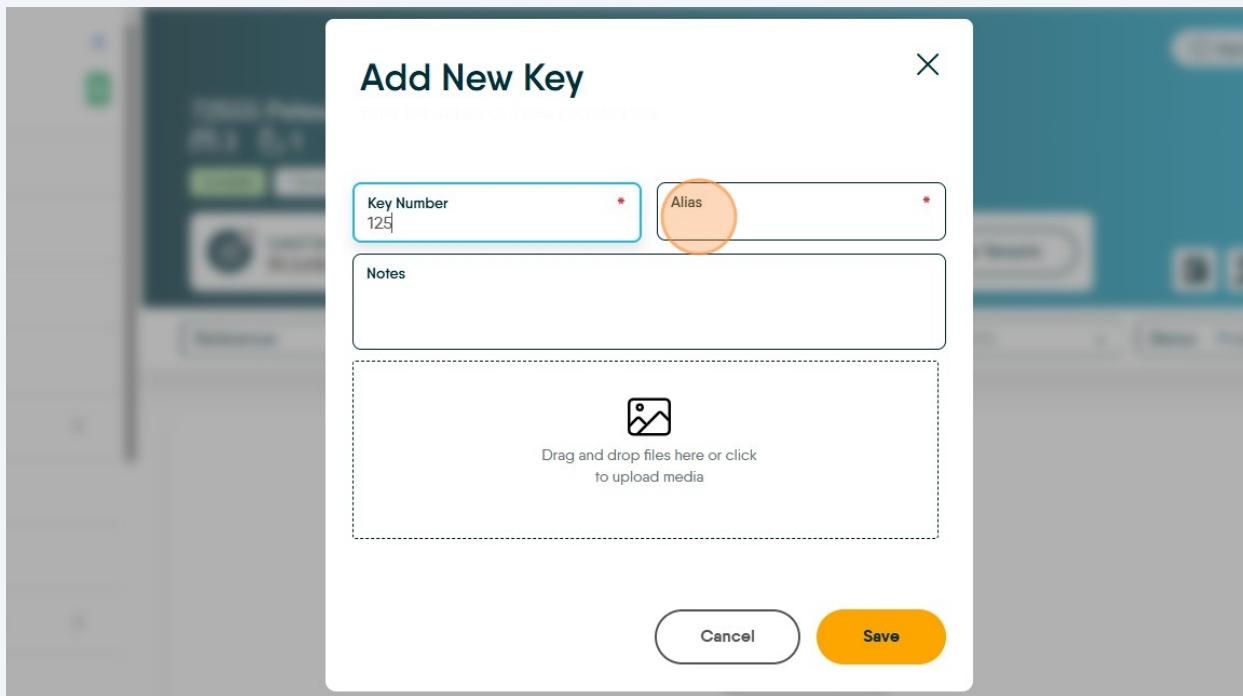
6 Click this field and add any **'Notes'** regarding the Keys, property etc.

Add New Key

Key Number
125 *

Alias
7255Pelaw *

Notes

Drag and drop files here or click
to upload media

Cancel   Save
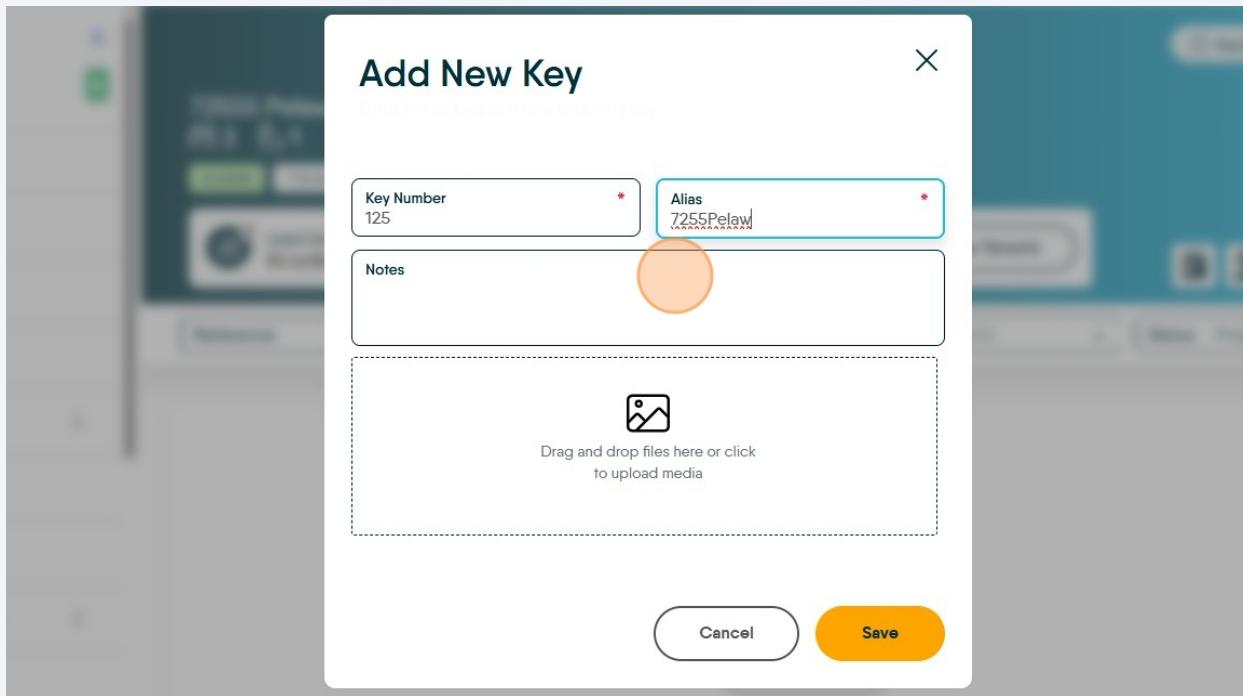
7 Click **"Drag and drop files here or click to upload media"** to add a picture of the keys.

Add New Key

Key Number
125 *

Alias
7255Pelaw *

Notes
Front Door is stiff to open

Drag and drop files here or click
to upload media

Cancel   Save
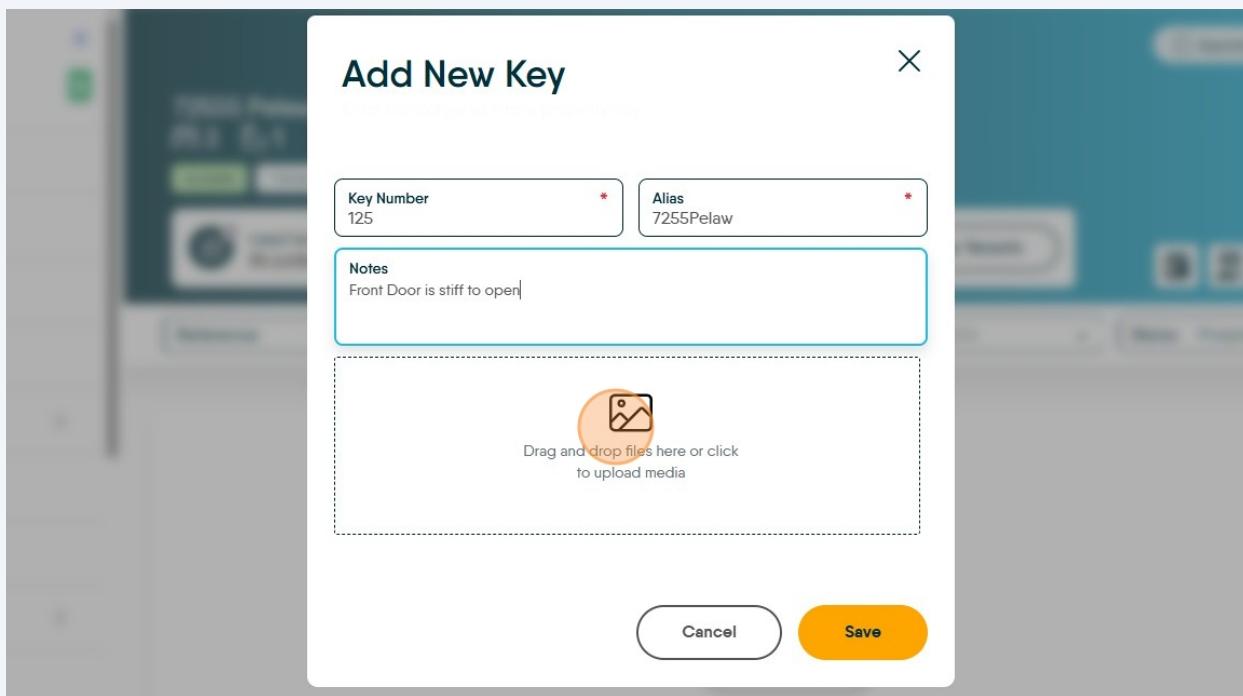
8 Click **"Save"** There can be more than one key logged per property. Repeat the process to add more keys.
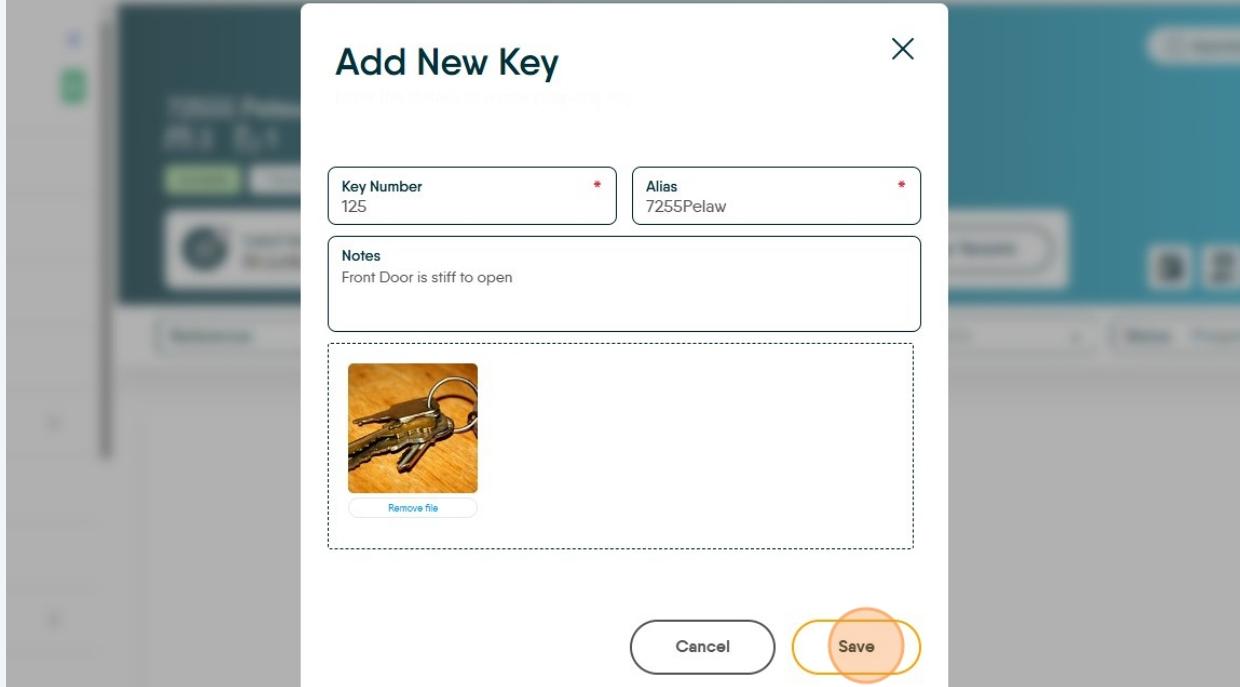
Logging a Key Out of CRM

> (i) There are a number of places that a key can be signed out of and back into CRM.
>
> • Property Record
>
> • Key Control (in Activity List)
>
> • Property Management
>
> The process for logging keys Out/In is the same in each section of CRM.
>
> Overdue keys will show in the "Keys Due Back" section of the Activity List.

9 For this guide we will log keys in/out from a Property record.

10 In a Property record. Click **"Key Control"**

11 Click **"Sign Out"**

12 Click **"Select Key"** and select the key from the drop down list, there can be more than 1 key logged per property.
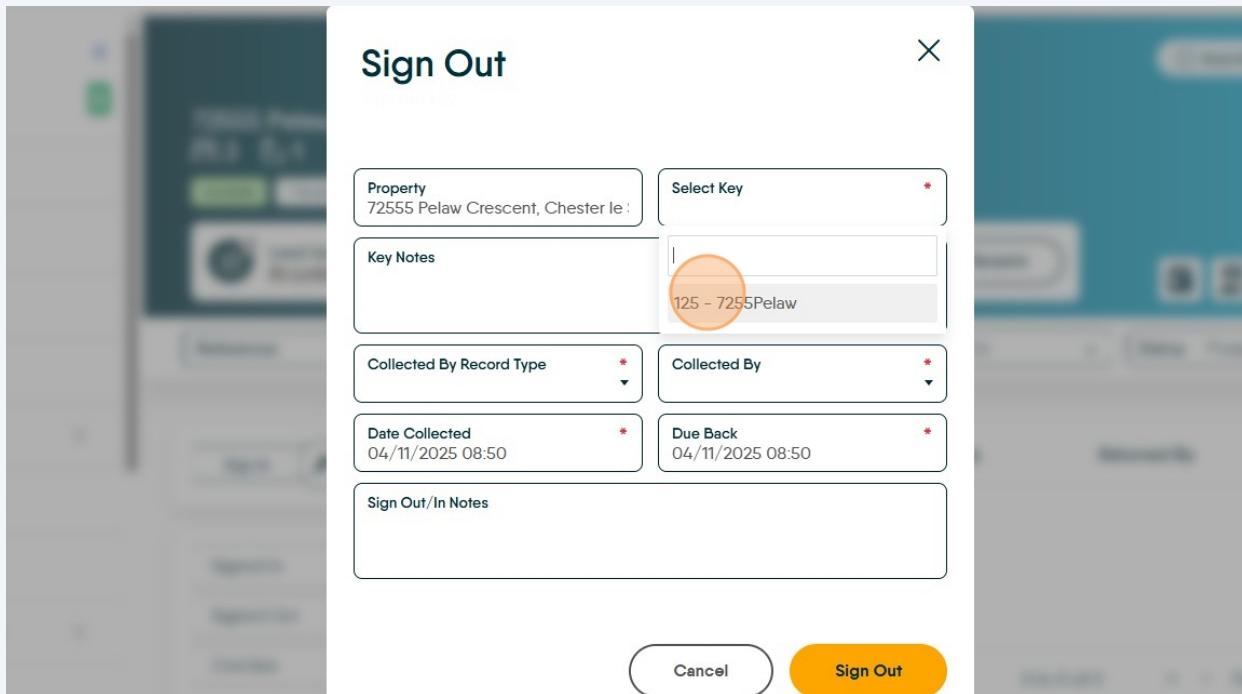
13 Click **"Collected By Record Type"** and select the type of person who collected the key e.g. "Negotiator"
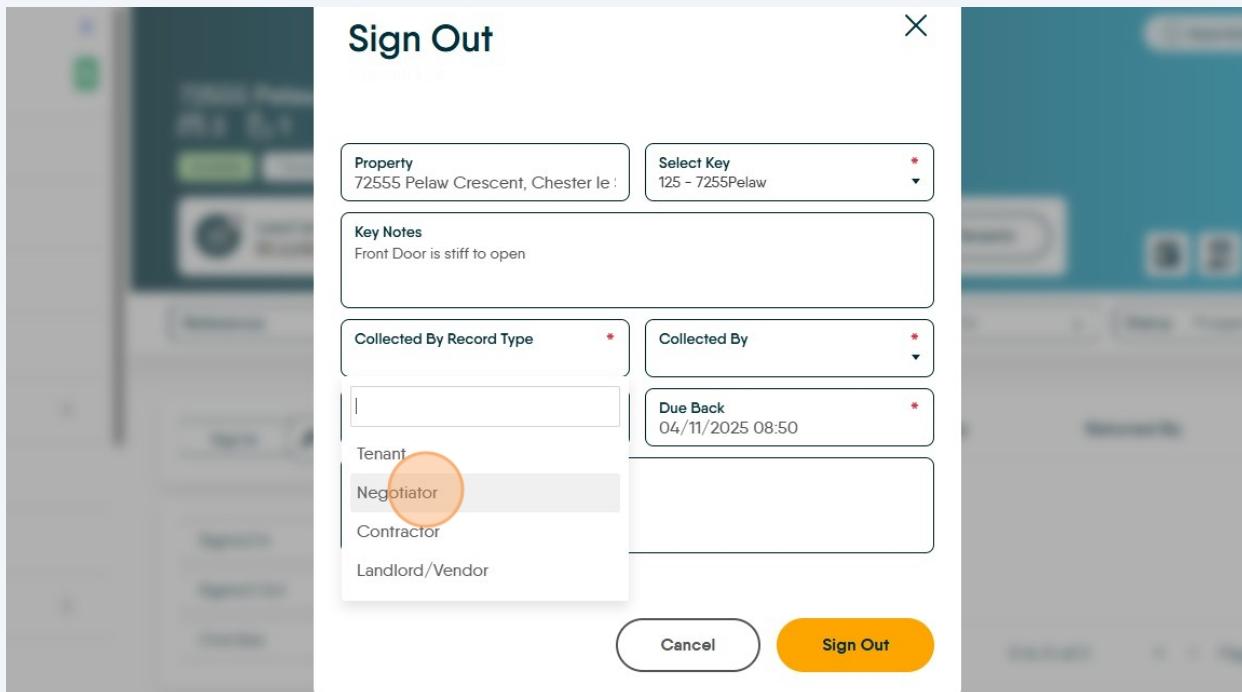
14 Click **"Collected By"** and select the name of the person collecting the key e.g. "Training Dave"
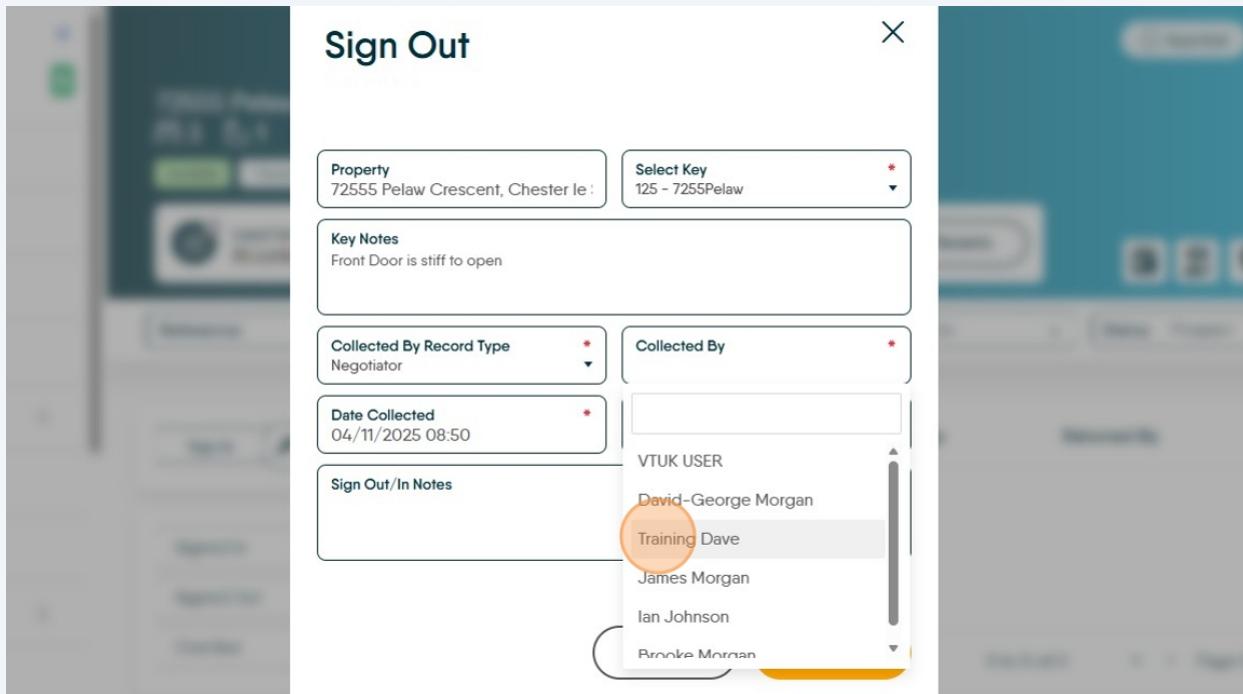
15 The **"Date Collected"** will default to the current date and time, edit this if required.
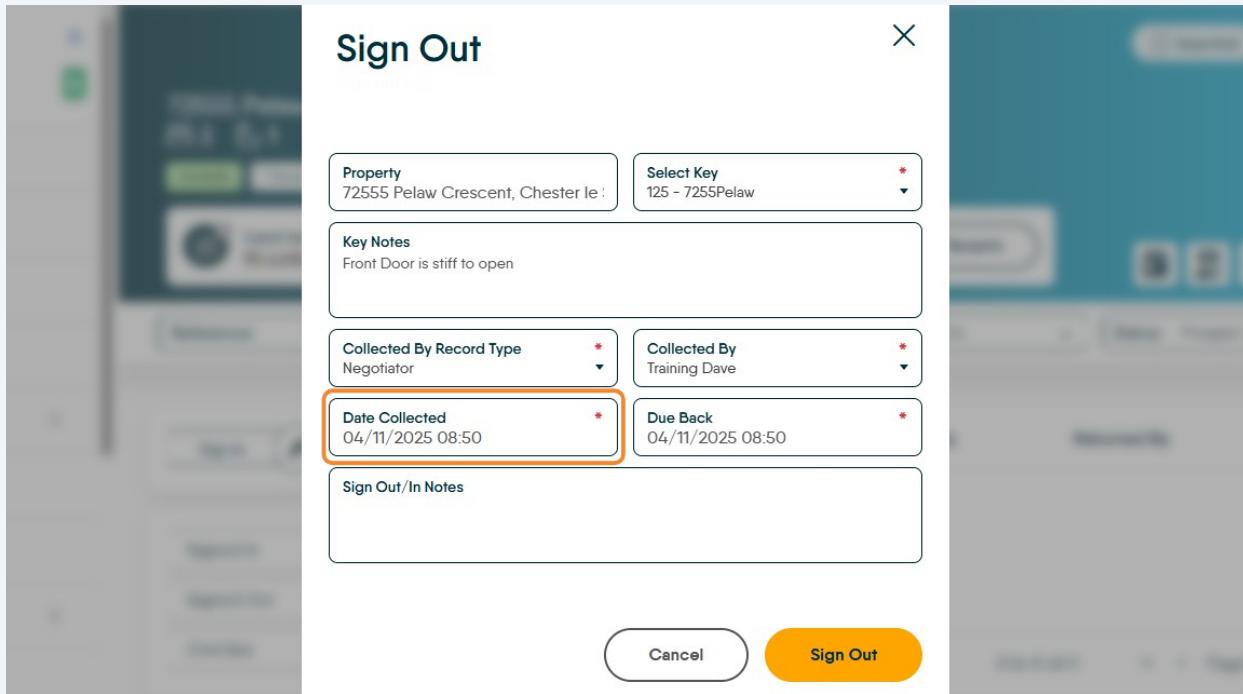
16 The **"Date Due"** back will also default to the current date and time, so this will need to be updated to the date/time you expect the keys returned.
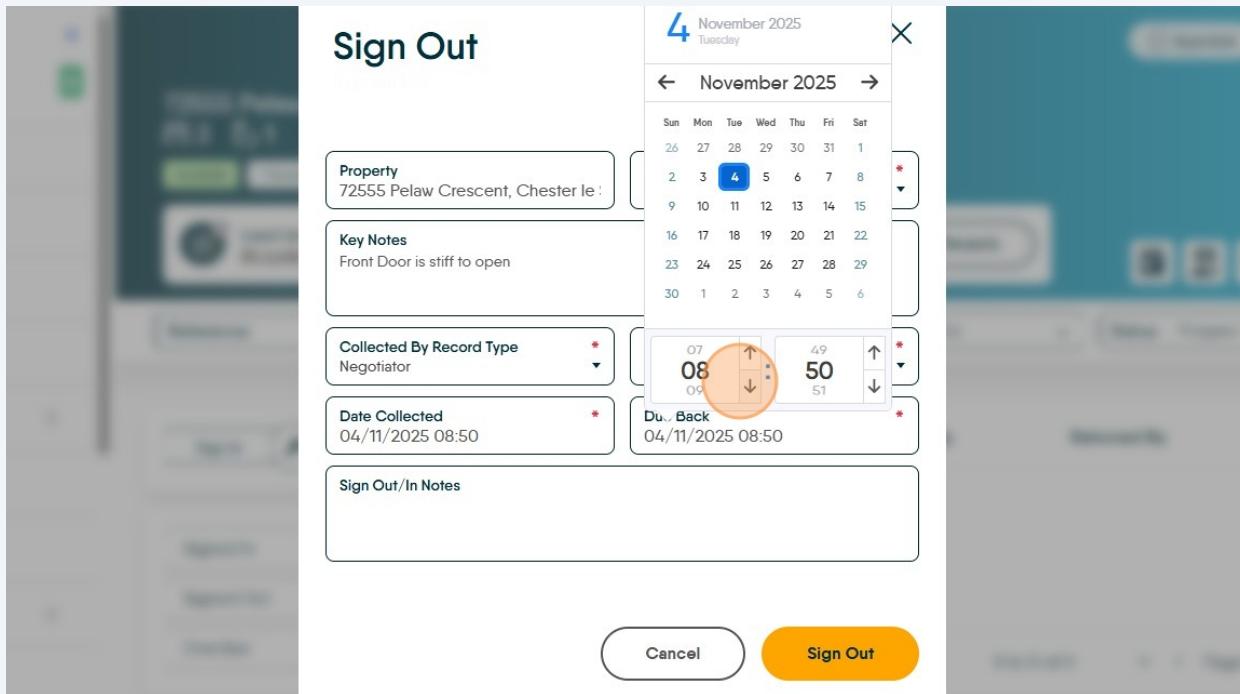
17 In the **"Signed Out/In Notes"** field add any notes about the sign out for future reference.

18 Click **"Sign Out"**

Sign Out

Property	Select Key *
72555 Pelaw Crescent, Chester le :	125 – 7255Pelaw

Key Notes
Front Door is stiff to open

Collected By Record Type *	Collected By *
Negotiator	Training Dave

Date Collected *	Due Back *
04/11/2025 08:50	04/11/2025 11:50

Sign Out/In Notes
Signed out for viewing
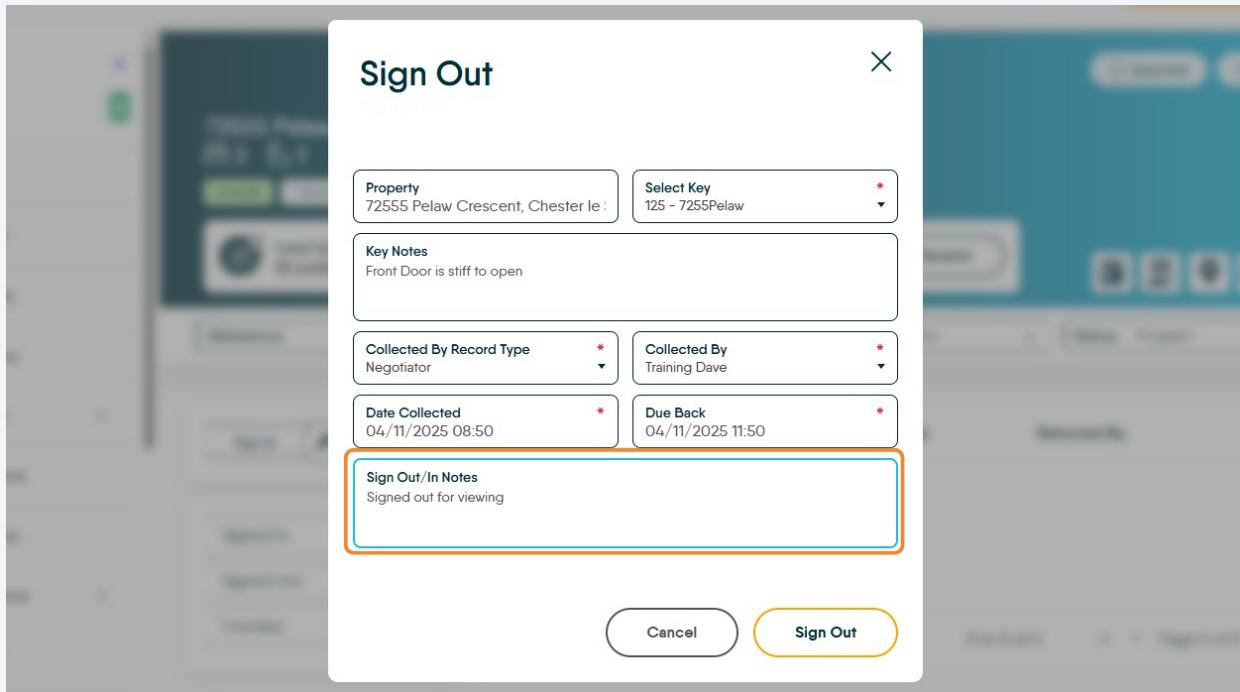
Cancel   Sign Out
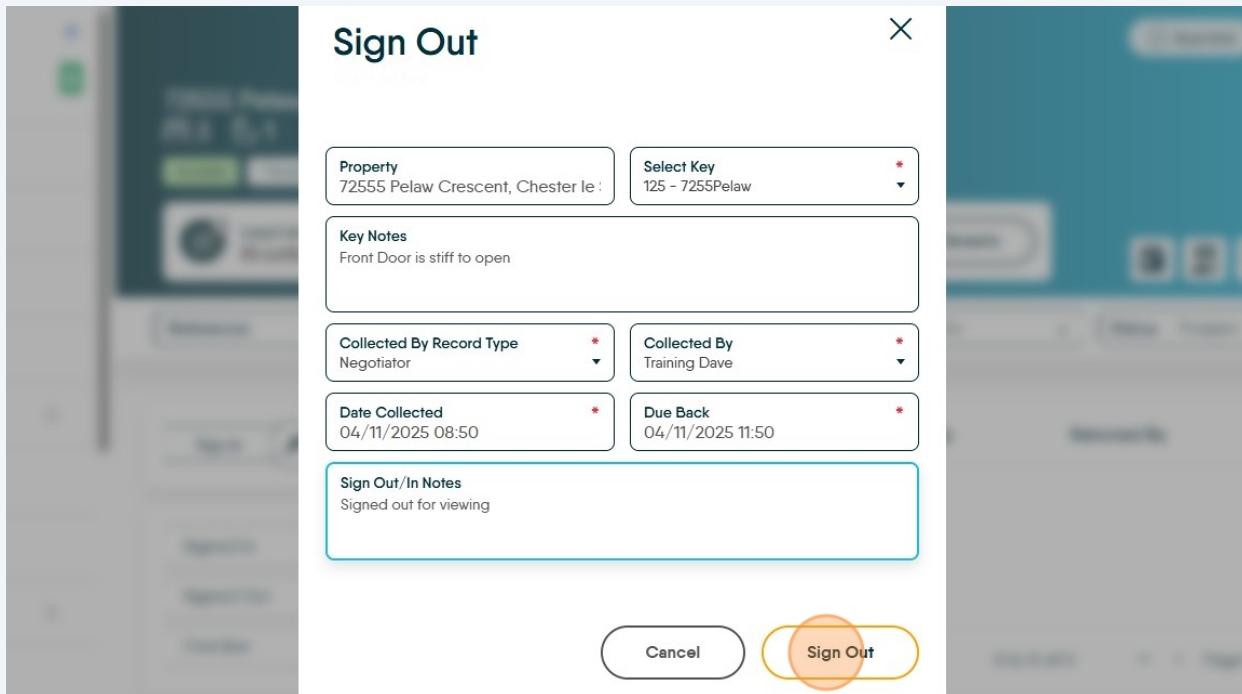
19 The key will then show on the screen as signed out, clicking the (highlighted) filters on the left side of the screen will allow vision of different key states.

> **ⓘ** Tip! If you are signing a key out for the final time e.g. property is sold, the key record can be deleted from the CRM. If it is being signed out to a Tenant, there are many options. The best advice is to sign the key out for the term of the Tenancy and sign back out/extend when the tenancy is reconfirmed.

Managing Keys from Key Control

20   In the Activity List. Click the **"Key Control"** tile.

21 This will show a complete list of all keys that have been signed in or out in the CRM. Any highlighted in 'Red' are over due. Keys can be searched for using "Search Key Log" and filtered using the options on the left side.

Keys can be selected and signed In or Out from here.

22 In the **"Keys Due Back" menu**

23 In the Activity List. Click **"Keys Due Back"**
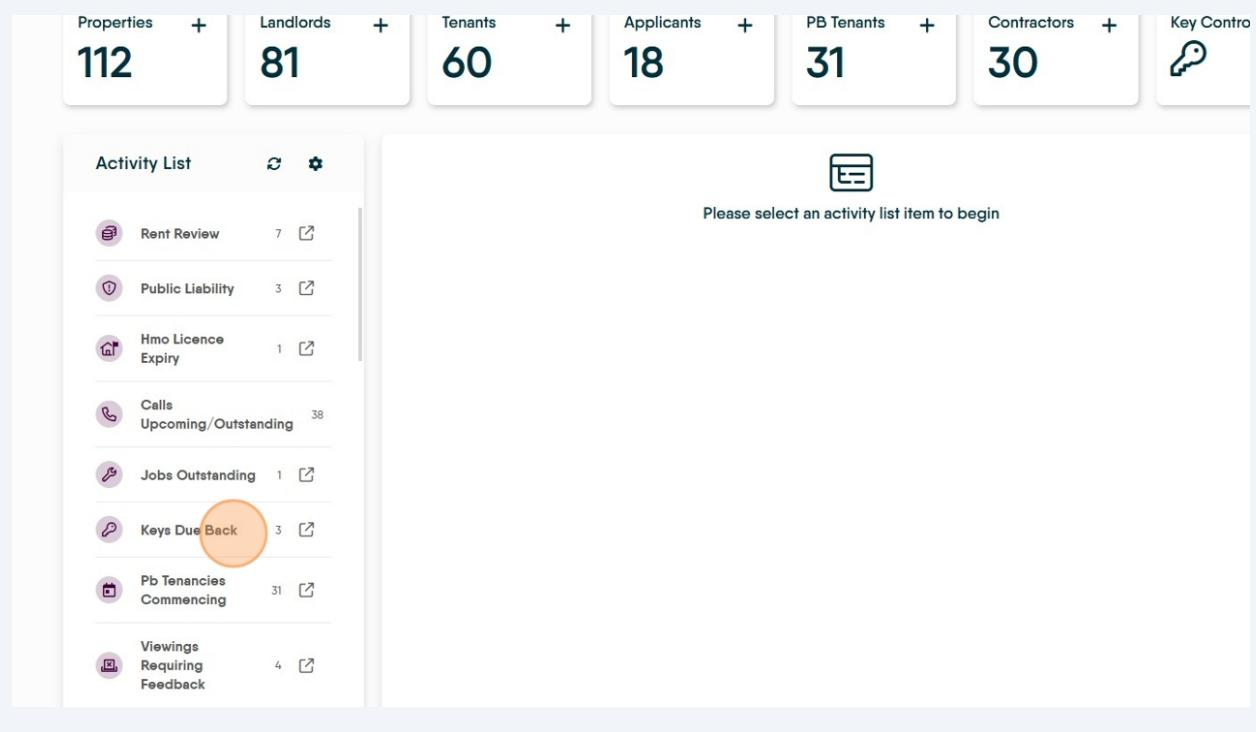
Properties +	Landlords +	Tenants +	Applicants +	PB Tenants +	Contractors +	Key Contro
112	81	60	18	31	30	🔑

Activity List ↻ ⚙

🗄 Rent Review	7	⤢
🛡 Public Liability	3	⤢
🏠 Hmo Licence Expiry	1	⤢
📞 Calls Upcoming/Outstanding	38	
🔧 Jobs Outstanding	1	⤢
🔑 Keys Due Back	3	⤢
📅 Pb Tenancies Commencing	31	⤢
🏢 Viewings Requiring Feedback	4	⤢

🗎 Please select an activity list item to begin

---

24 This screen will show all the currently signed out keys that are due back within the timescales set in the Activity List configuration (default is 30 days) Clicking the checkbox will select a specific line.

81	60	18	31	30	🗝

↻ ⚙

Keys Due Back ✕

✉ 💬 📤 ▼ ☰   ↻ [Search_____]
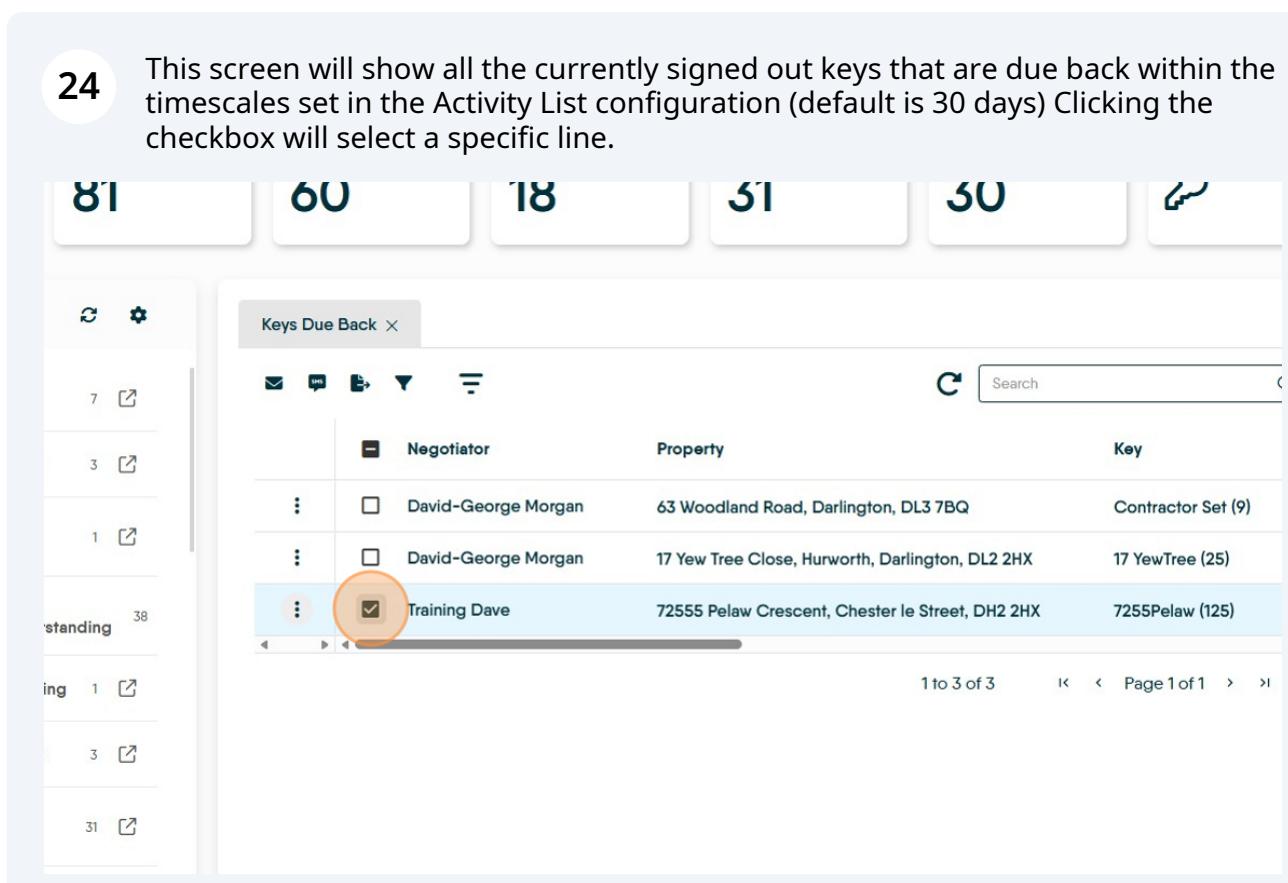
		Negotiator	Property	Key
⋮	☐	David-George Morgan	63 Woodland Road, Darlington, DL3 7BQ	Contractor Set (9)
⋮	☐	David-George Morgan	17 Yew Tree Close, Hurworth, Darlington, DL2 2HX	17 YewTree (25)
⋮	☑	Training Dave	72555 Pelaw Crescent, Chester le Street, DH2 2HX	7255Pelaw (125)

1 to 3 of 3 |< < Page 1 of 1 > >|

7	⤢
3	⤢
1	⤢
standing	38
ing	1	⤢
3	⤢
31	⤢

25 Click **"3-dot menu"** will give you some options. Clicking the icons (highlighted) will enable SMS or email to be sent to chase the overdue key.

Logging a Key Back Into CRM

26 From **"Key Control"** Click here.

27   In the Key Control sections, select the key

Property	Key Number	Alias	Signed Out	Sig
☑ Flat 14 Westpoint, Northumberland Street, Darlington	8	14Westpoint	13/06/2023 10:30	Da
☐ 63 Woodland Road, Darlington	9	Contractor Set	28/06/2023 10:43	Da
☐ Flat 14 Westpoint, Northumberland Street, Darlington	8	14Westpoint	29/06/2023 11:02	Da
☐ 97 Yew Tree Close, Hurworth, Darlington	56	4yew	06/07/2023 11:46	Da
☐ 63 Woodland Road, Darlington	9	Contractor Set	10/10/2023 13:30	Da
☐ 63 Woodland Road, Darlington	9	Contractor Set	10/10/2023 13:31	Da
☐ 75 Pelaw Crescent, Chester le Street	1	our keys	27/11/2023 10:35	Da
☐ 24 Westgarth Terrace, Darlington	MO1	Tenants set	27/11/2023 15:12	Da
☐ Flat 1 119 Promenade, Cheltenham	45667	key	12/04/2024 20:27	Tra
☐ Flat 1 119 Promenade, Cheltenham	45667A	Key set 2	12/04/2024 20:27	Tra
☐ Flat 1 119 Promenade, Cheltenham	45667	Key Box	12/04/2024 20:27	Tra
☐ 24 Westgarth Terrace, Darlington	RO1	master set	01/05/2024 14:24	Tra
☐ 24 Westgarth Terrace, Darlington	RO1	master set	21/05/2024 10:39	Tra

Sign In Sign Out
Search Key Log
Signed In
Signed Out
Overdue

28   Click **"Sign In"**

iamproperty   CRM   movebutler

iam property   My day   Lettings ⌄   Sales ⌄   Accounts ⌄   Reporting ⌄   Communications ⌄   My acc

Sign In Sign Out
Search Key Log
Signed In
Signed Out
Overdue

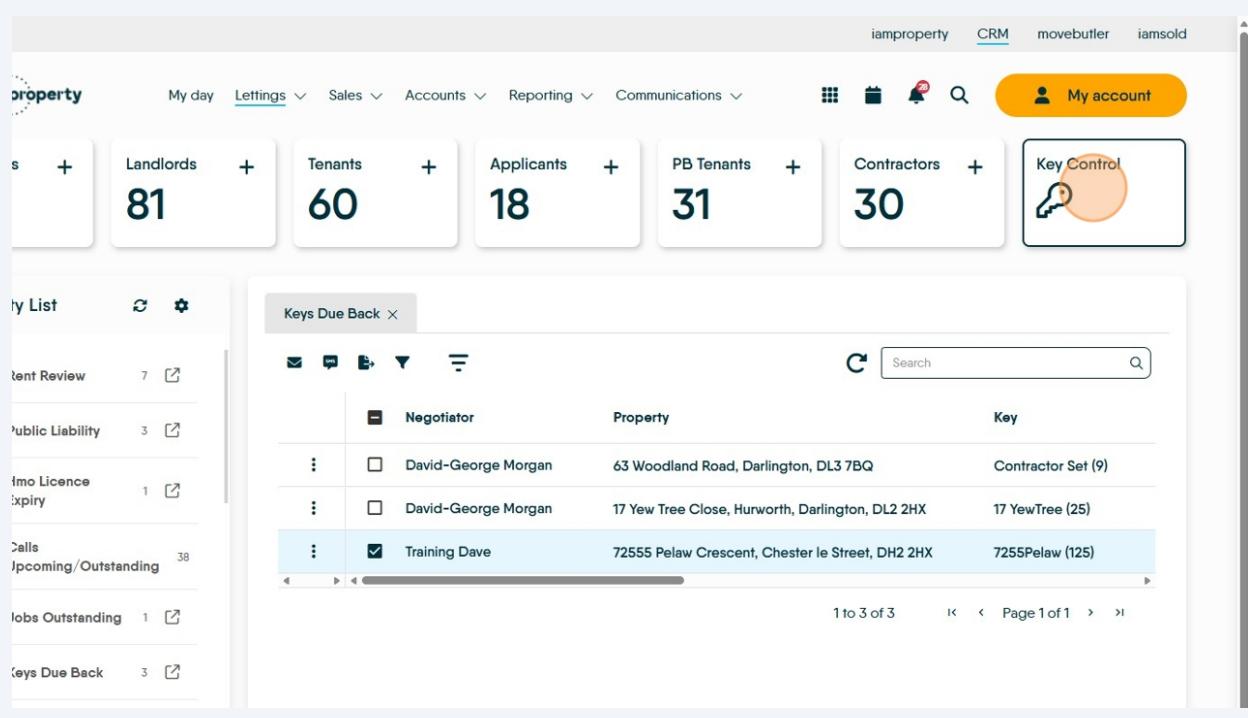| Property	Key Number	Alias	Signed Out	Sig
☐ Flat 14 Westpoint, Northumberland Street, Darlington	8	14Westpoint	13/06/2023 10:30	Da
☐ 63 Woodland Road, Darlington	9	Contractor Set	28/06/2023 10:43	Da
☐ Flat 14 Westpoint, Northumberland Street, Darlington	8	14Westpoint	29/06/2023 11:02	Da
☐ 97 Yew Tree Close, Hurworth, Darlington	56	4yew	06/07/2023 11:46	Da
☐ 63 Woodland Road, Darlington	9	Contractor Set	10/10/2023 13:30	Da
☑ 63 Woodland Road, Darlington	9	Contractor Set	10/10/2023 13:31	Da
☐ 75 Pelaw Crescent, Chester le Street	1	our keys	27/11/2023 10:35	Da
☐ 24 Westgarth Terrace, Darlington	MO1	Tenants set	27/11/2023 15:12	Da
☐ Flat 1 119 Promenade, Cheltenham	45667	key	12/04/2024 20:27	Tra
☐ Flat 1 119 Promenade, Cheltenham	45667A	Key set 2	12/04/2024 20:27	Tra
☐ Flat 1 119 Promenade, Cheltenham	45667	Key Box	12/04/2024 20:27	Tra

29 This **"Sign In"** screen will show.

Sign In ✕

Property
63 Woodland Road, Darlington

Select Key *
9 – Contractor Set ▼

Key Notes
HMO. Keys to all rooms should be in doors. These keys are for main property door, basement and back doors

Returned By Record Type *
Contractor ▼

Returned By *
Morgan Contracting ▼

Date Returned *
04/11/2025 09:25

Sign In/Out Notes

[Cancel]   [**Sign In**]

---

30 In the **"Sign In/Out Notes"** add any notes to support the sign in.

Sign In ✕

Property
63 Woodland Road, Darlington

Select Key *
9 – Contractor Set ▼

Key Notes
HMO. Keys to all rooms should be in doors. These keys are for main property door, basement and back doors

Returned By Record Type *
Contractor ▼

Returned By *
Morgan Contracting ▼

Date Returned *
04/11/2025 09:25

Sign In/Out Notes

[Cancel]   [**Sign In**]

31   Click **"Sign In"** and the key is signed in.
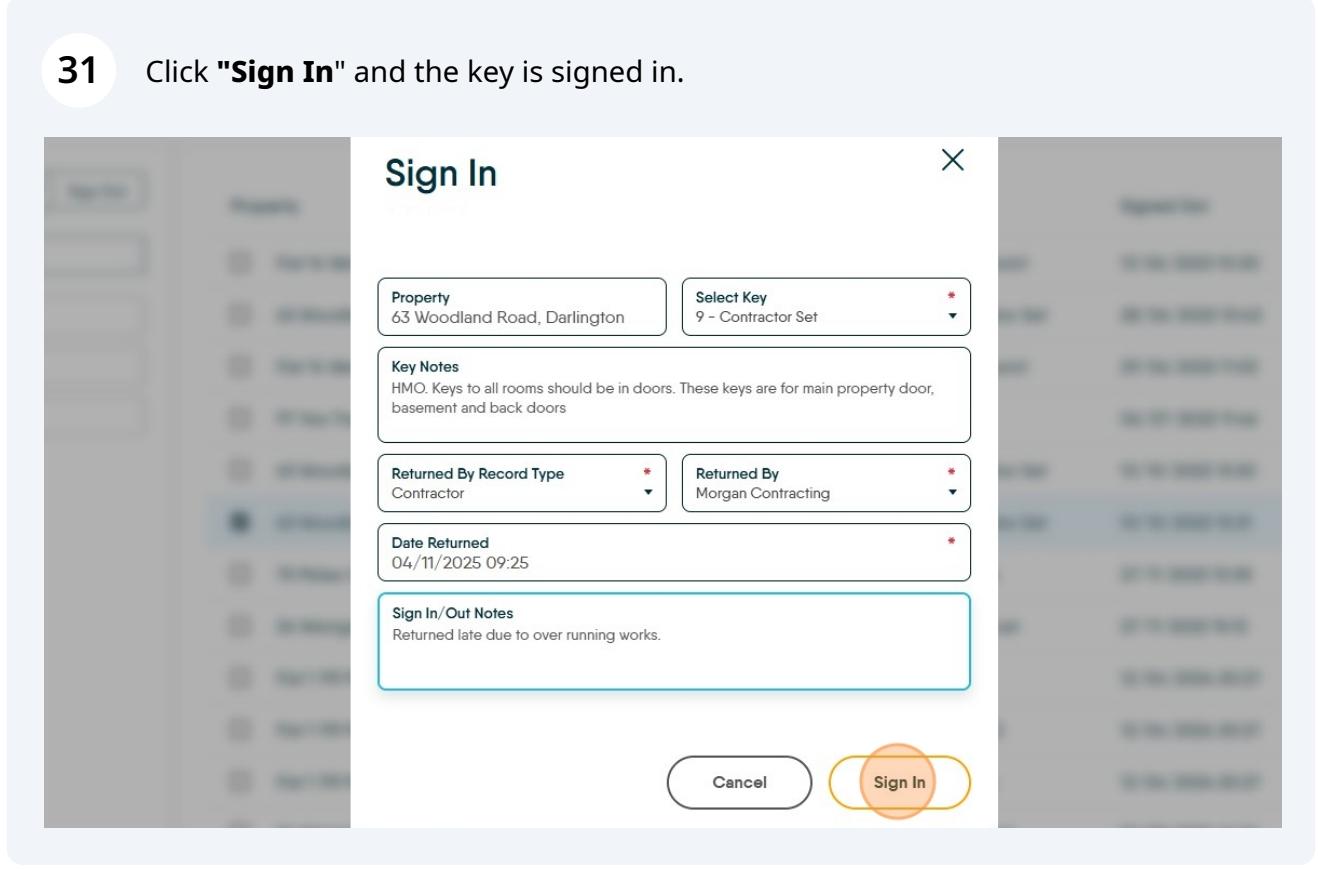
32   Sign in via Property Record.

33 Click **"Key Control"**

| Live Jobs | 0 |
| EPC Rating | B |

- 🏠 Details
- ✔ Checklist
- 🏠 Appraisals
- ☰ Inspections
- ▭ Accounts >
- 🛡 Compliance
- ⓘ Information
- 🔧 maintenance >
- € Payment
- 🔖 Marketing
- 🔑 Key Control

Postcode
DH2 2HX

Property Information

| 📋 ✔ Fully managed This property is fully managed by us | £ Rent collect We collect rent for this property | 📣 Let only We only let property |

Management Fee
10   £

Upfront Letting Fee
£ 850   £

Regular Letting Fee
£ 0   £

Authorised Expense Amount   Estimated Rental Value
£ 0.00   £ 0.00

Agreement Name

COMMERCIAL

Commercial Unit   ⚪

| Exempt Rent amount is exempt from VAT | Inclusive ✔ Rent amount is inclusive of VAT | Exclusive Rent amount is exclusive of VAT |

Scheduled Management Fee ⓘ

---

34 Click **"Sign In"**

| Live Jobs | 0 |
| EPC Rating | B |

- 🏠 Details
- ✔ Checklist
- 🏠 Appraisals
- ☰ Inspections
- ▭ Accounts >
- 🛡 Compliance
- ⓘ Information
- 🔧 maintenance >
- € Payment
- 🔖 Marketing
- 🔑 Key Control

✅ Appraisal

72555 Pelaw Crescent, Chester le Street, DH2 2HX
🛏 3 🛁 1 | £ 1500.00 pcm
Available   1 Tenant

| Lead landlord: Mr Lettings Landlo... | View Landlords | | Lead tenant: Lettings Applica... | View Tenants | 📅 🖥 📍 |

Reference: [   ]   Negotiator: Training Dave ▾   Branch Morgan & Co ▾   Status Prospect

| Sign In 🔑 Sign Out |

Key Number	Alias	Signed Out	Signed Out By	Collected By
125	7255Pel...	04/11/2025 0...	Training Dave	Training Dave

Signed In
Signed Out
Overdue

1 to 1 of 1 |< ‹ Page 1 of

125
7255Pelaw ✏ 🗑

+ Add Key

35 Click here to select the key you are signing back in as there can be multiple keys.
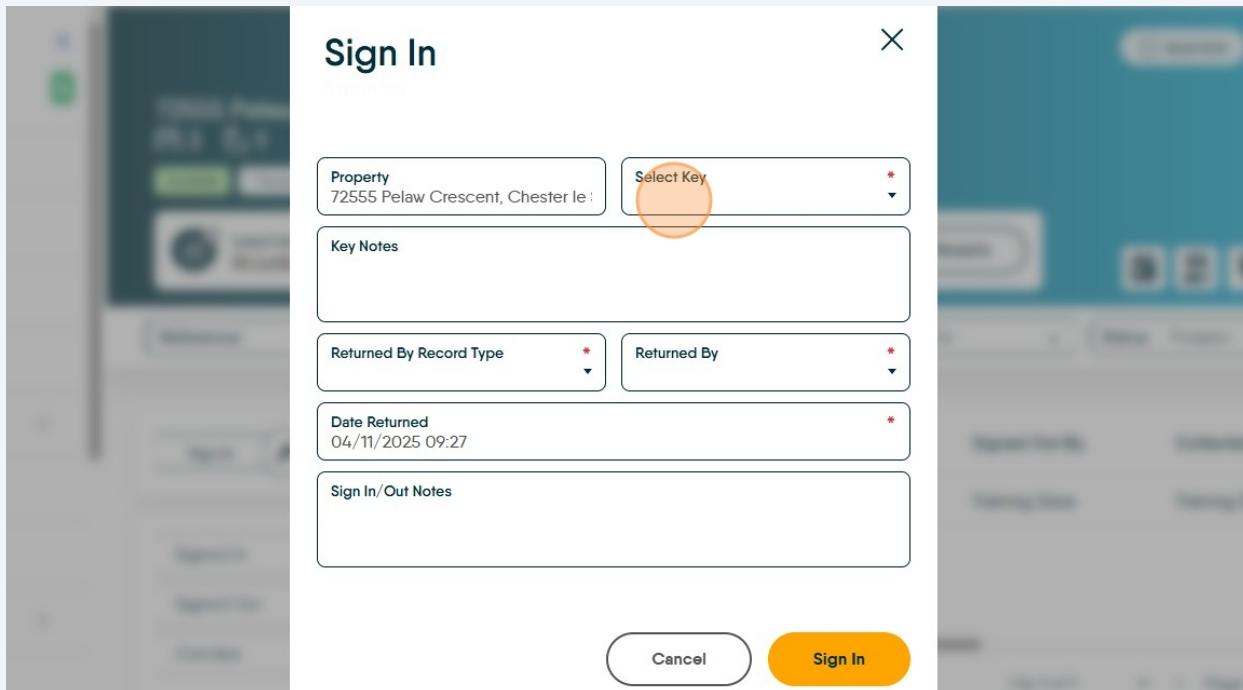
36 Click the key you are signing back in e.g. "125 - 7255Pelaw"
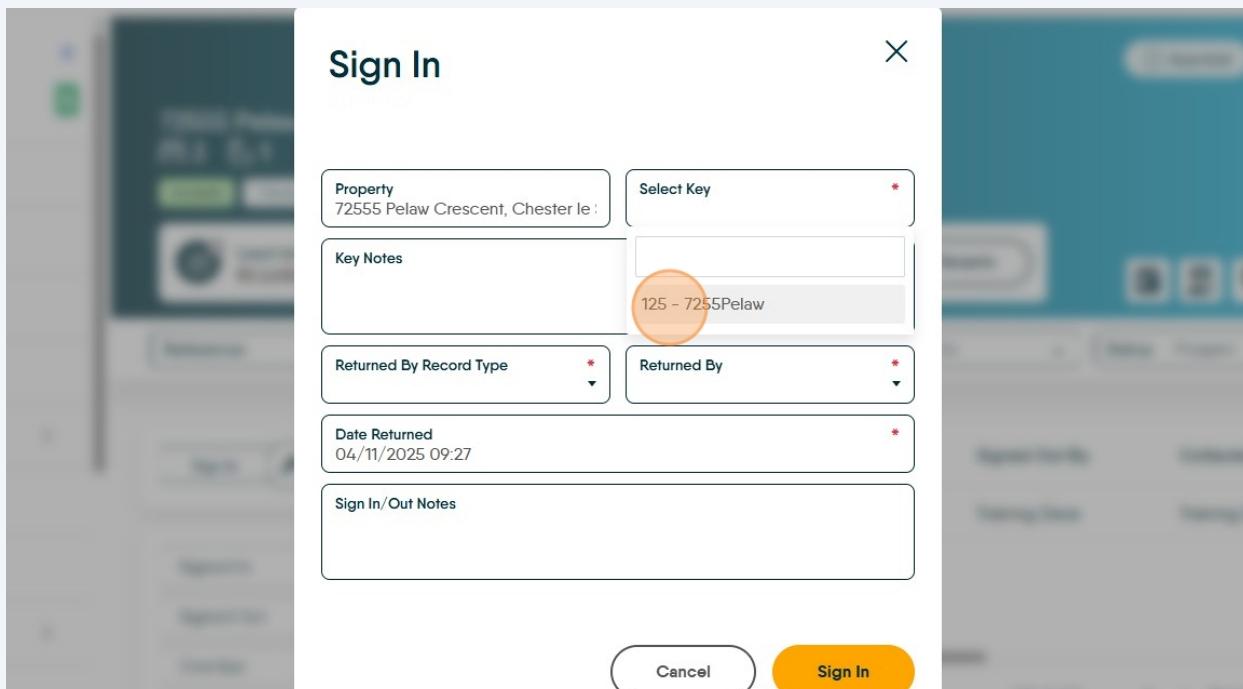
37 In **"Sign in/Out Notes"** add some detail to why, who etc the key is signed in.
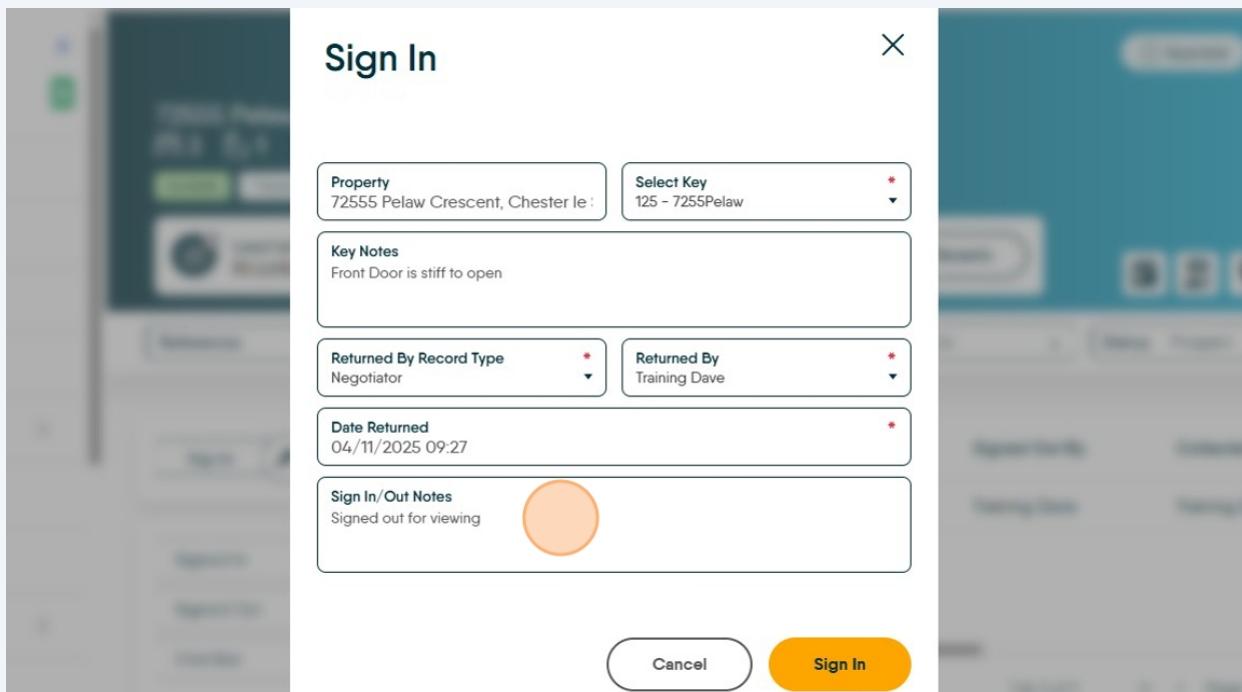
38 In **"Sign In/Out Notes"** Update the notes e.g. Type " - Returned"
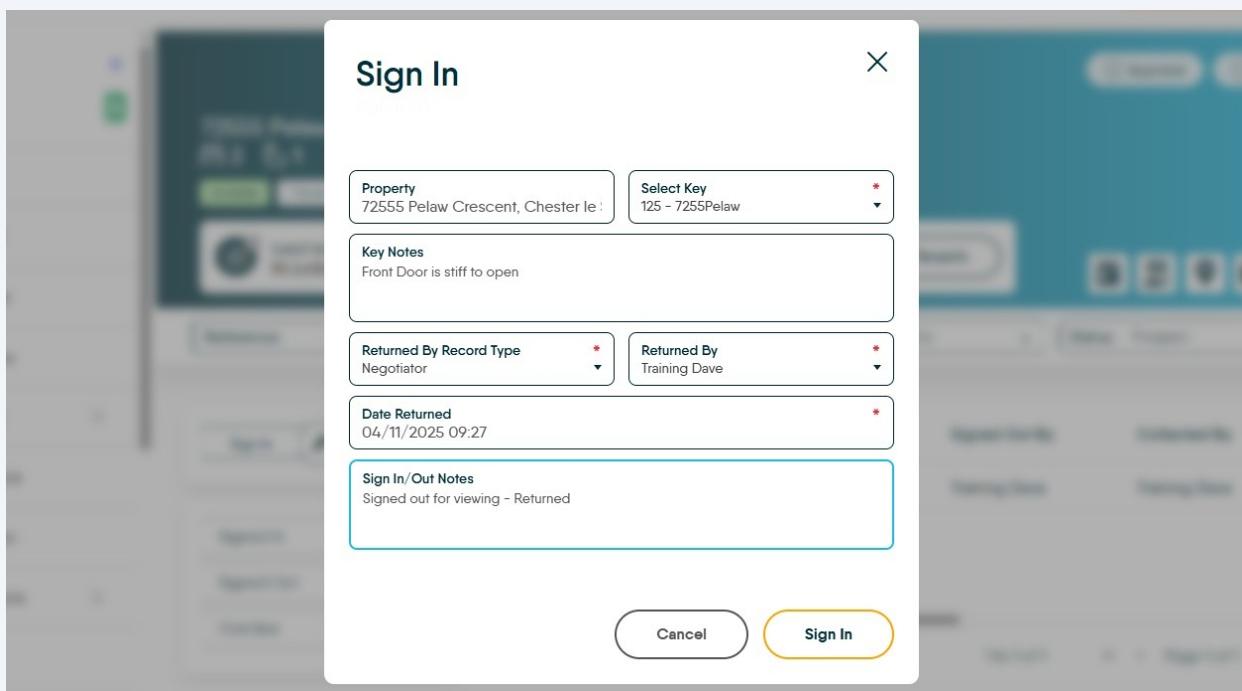
39 Click **"Sign In"**

Sign In ✕

Property
72555 Pelaw Crescent, Chester le :

Select Key *
125 – 7255Pelaw ▾

Key Notes
Front Door is stiff to open

Returned By Record Type *
Negotiator ▾

Returned By *
Training Dave ▾

Date Returned *
04/11/2025 09:27

Sign In/Out Notes
Signed out for viewing – Returned

Cancel   Sign In

---
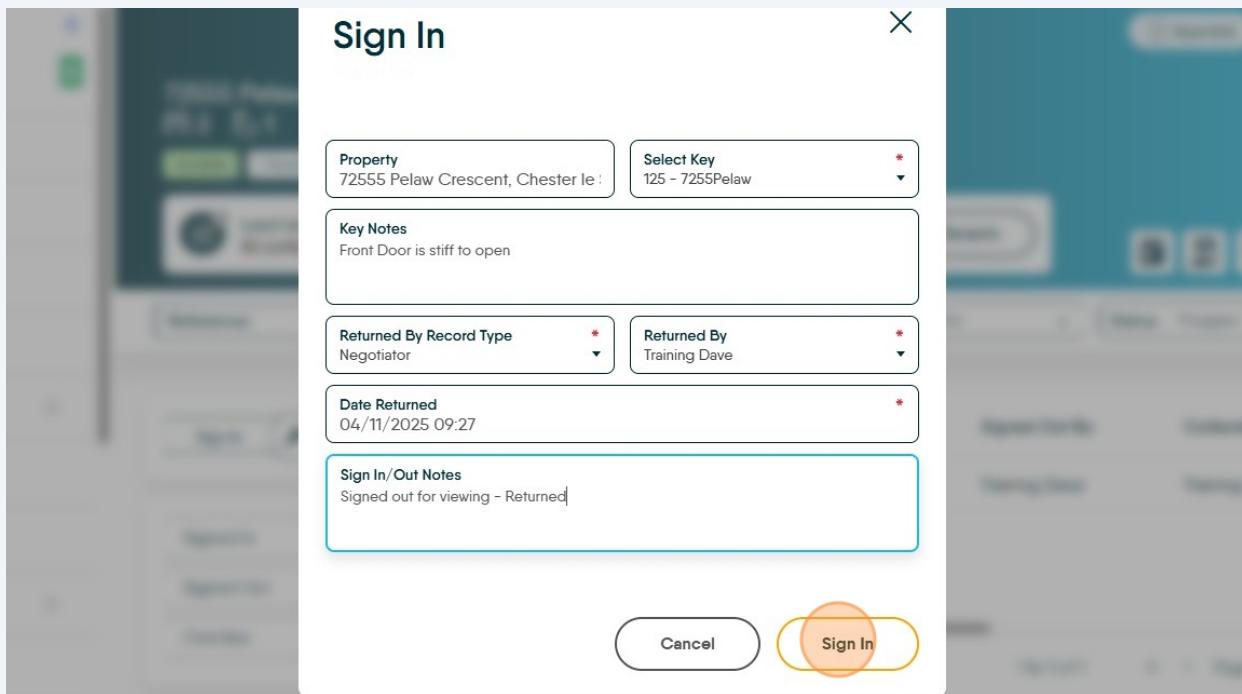
40 The Key will now show in the screen as Signed In, with the date and people signing in, returning the key.

✓ Appraisal   ⚠ Warning

v Crescent, Chester le Street, DH2 2HX | 🛏3 🛁1 | £

andlord: View Landlords   Lead tenant: View Tenants
ngs Landlord182   Lettings Applicant182

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

	Key Nu...	Alias	Signed ...	Signed ...	Collect...	Due Ba...	Signed In	Signed ...	Returne...
Sign Out	125	7255Pelaw	04/11/20...	Training D...	Training D...	04/11/20...	04/11/20...	Training D...	Training D...

1 to 1 of 1   I◄ ◄ Page 1 of 1 ► ►I