

Managing Key Records in CRM



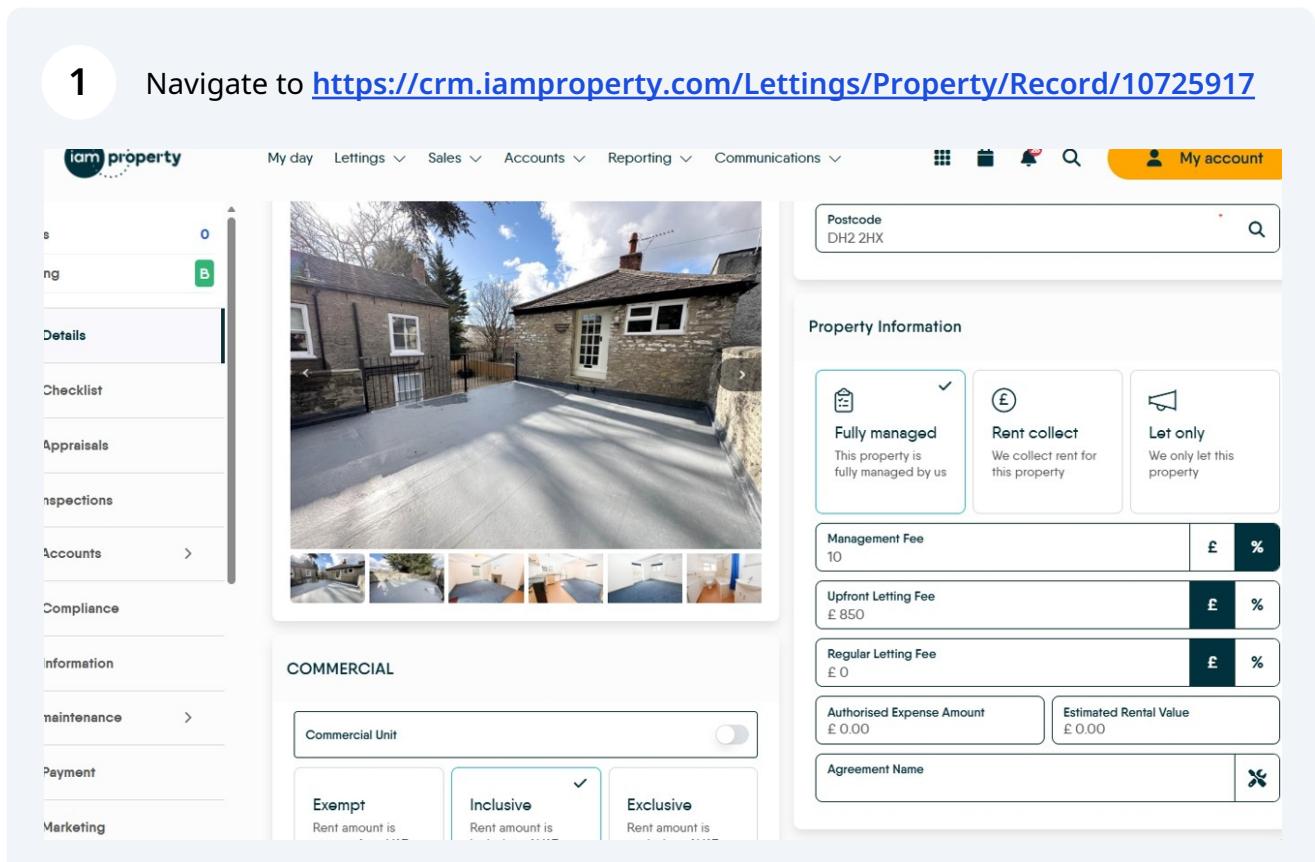
This guide provides a straightforward process for adding a key record to a property and logging that key In and Out of your offices. Ensuring that you can efficiently manage access and maintenance issues.

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>



The screenshot shows the iam property CRM interface. The top navigation bar includes 'My day', 'Lettings', 'Sales', 'Accounts', 'Reporting', 'Communications', a search bar, and 'My account'. The left sidebar has sections for 'Details', 'Checklist', 'Appraisals', 'Inspections', 'Accounts', 'Compliance', 'Information', 'Maintenance', 'Payment', and 'Marketing'. The main content area shows a property image of a two-story stone building with a garden. A search bar on the right shows 'Postcode DH2 2HX'. The 'Property Information' section includes three status boxes: 'Fully managed' (checked), 'Rent collect' (unchecked), and 'Let only' (unchecked). Below are management fee fields: 'Management Fee 10', 'Upfront Letting Fee £ 850', 'Regular Letting Fee £ 0', 'Authorised Expense Amount £ 0.00', 'Estimated Rental Value £ 0.00', and an 'Agreement Name' field with a delete icon. The 'COMMERCIAL' section shows a 'Commercial Unit' toggle (off) and three rent amount options: 'Exempt', 'Inclusive' (checked), and 'Exclusive'.

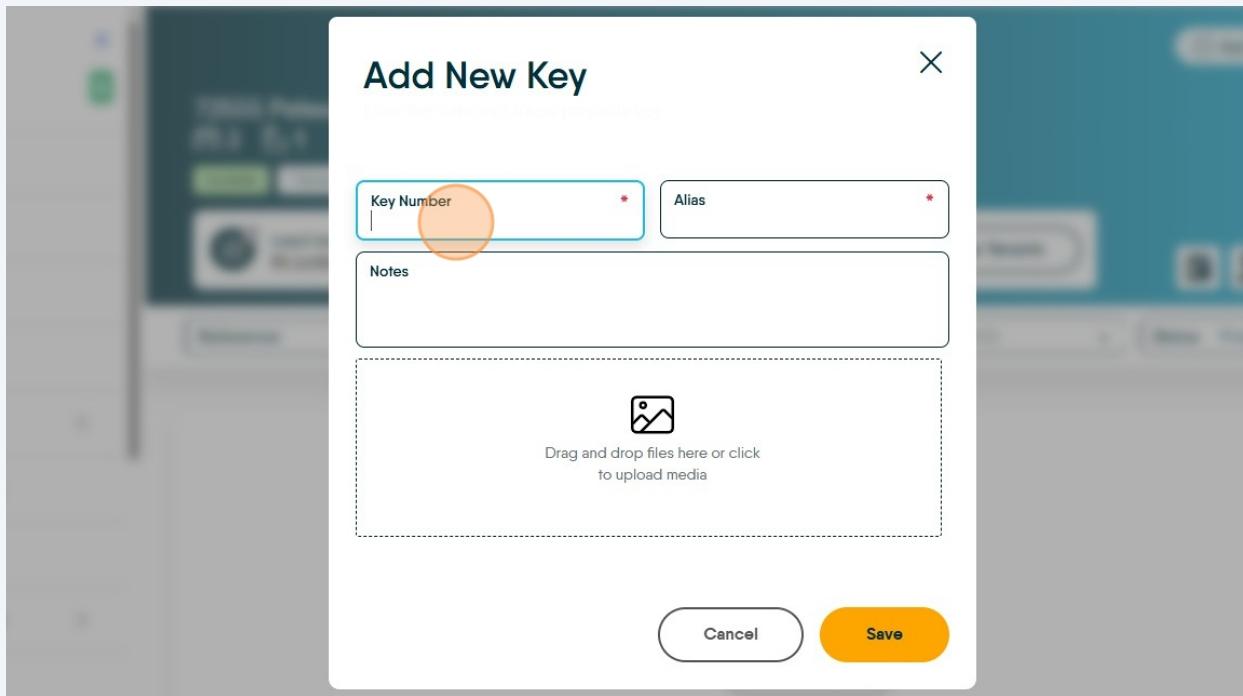
2 Click "Key Control"

The screenshot shows the software's main dashboard for a property at 72555 Pelaw Crescent, Chester le Street, DH2 2HX. The left sidebar lists various modules: Live Jobs (0), EPC Rating (B), Details, Checklist, Appraisals, Inspections, Accounts, Compliance, Information, maintenance, Payment, Marketing, and Key Control (highlighted with an orange circle). The central area displays a large image of the property's exterior and several smaller thumbnail images. The right side contains sections for Property Information, Management Fees, and Commercial details. The 'Fully managed' and 'Rent collect' options are selected. Management fees are listed as £10, £850, and £0. The 'Commercial' section shows options for 'Commercial Unit' (disabled), 'Exempt' (rent amount is exempt from VAT), 'Inclusive' (selected, rent amount is inclusive of VAT), and 'Exclusive' (rent amount is exclusive of VAT). The 'Scheduled Management Fee' is listed as £0.00.

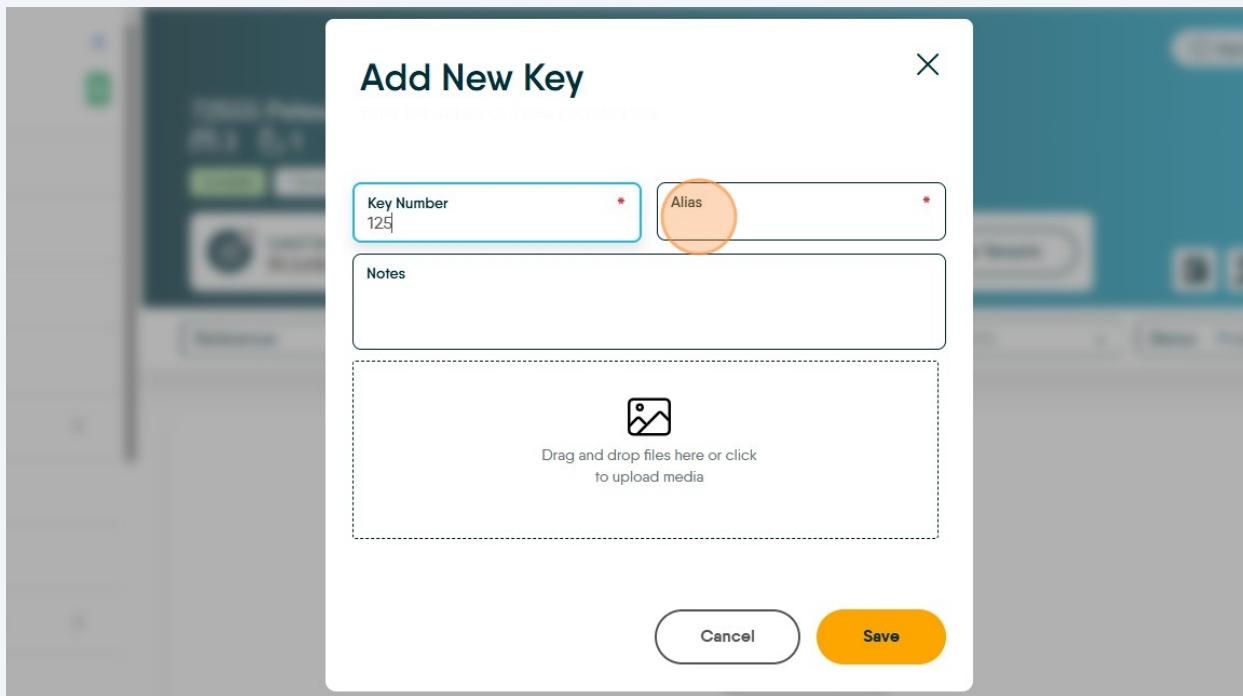
3 Click "Add Key"

The screenshot shows the property details for 72555 Pelaw Crescent, Chester le Street, DH2 2HX. The top bar includes 'Appraisal' and 'Warning' buttons. Below the address, it shows 3 beds, 1 bathroom, and £1500.00 pcm. The 'Available' and '1 Tenant' buttons are visible. The 'Lead landlord' and 'Lead tenant' sections are shown with their respective icons and names. The bottom section is titled 'Add Key' and displays a key icon with the text 'No keys available'. It includes a note: 'Please click the button to add' and a large 'Add Key' button, which is also highlighted with an orange circle. The sidebar on the left is identical to the one in the previous screenshot.

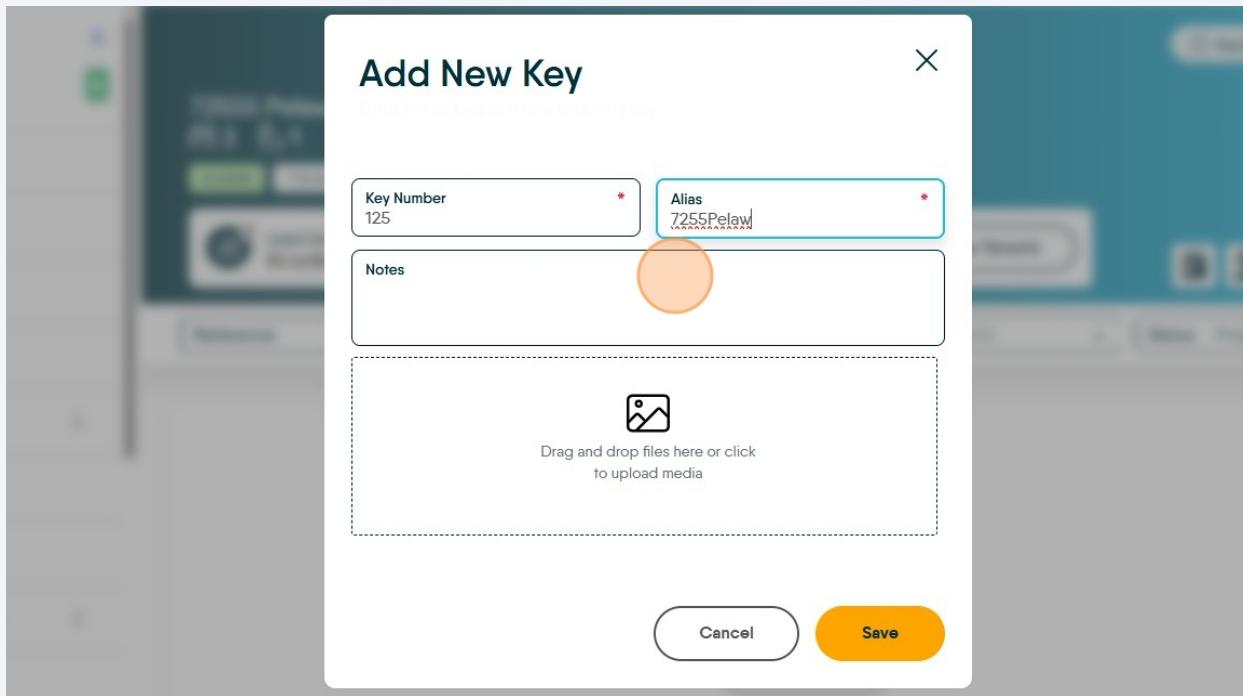
4 Click this text field and add a "Key Number"



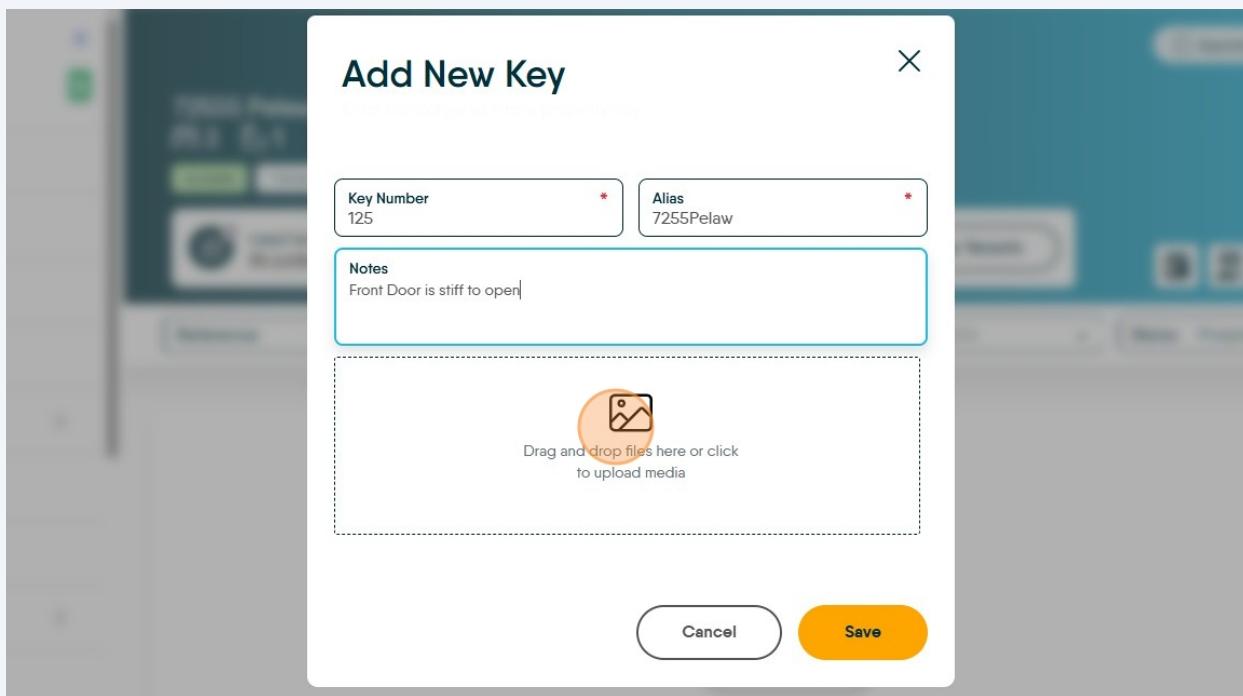
5 Click this text field add an 'Alias' (description) for the key



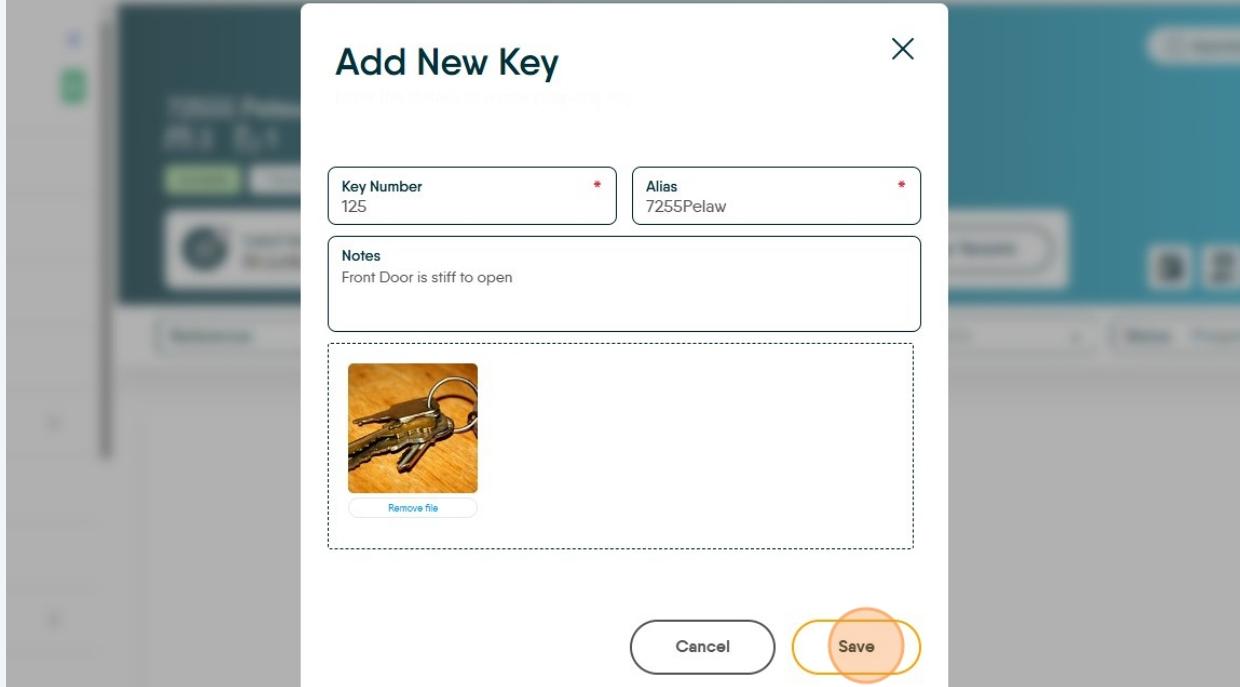
6 Click this field and add any '**Notes**' regarding the Keys, property etc.



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



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.

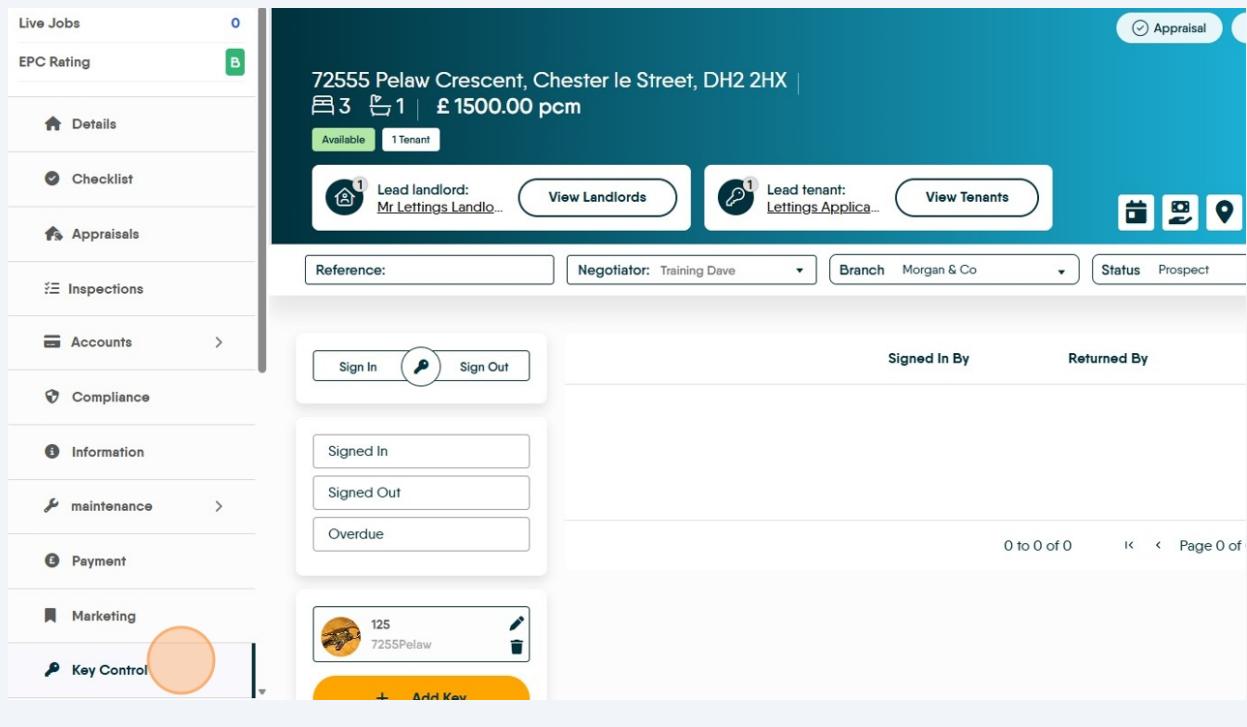
- Property Record
- Key Control (in Activity List)
- Property Management

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.

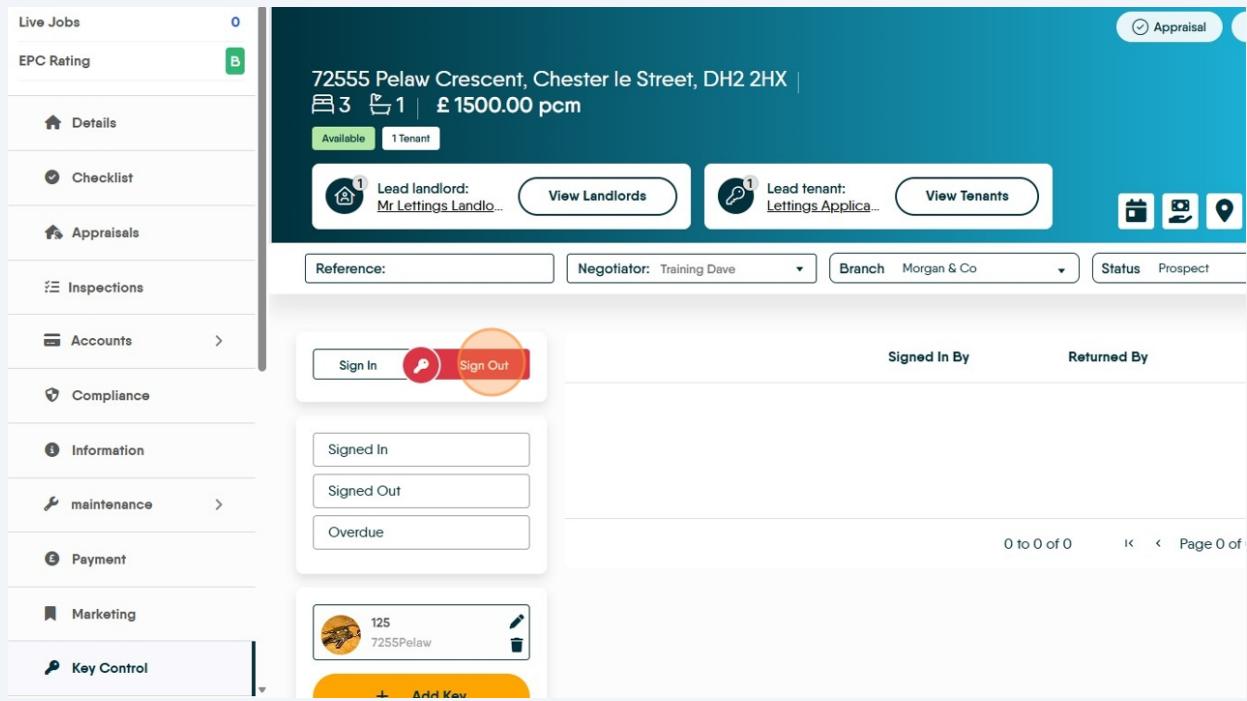
9 For this guide we will log keys in/out from a Property record.

10 In a Property record. Click "Key Control"



The screenshot shows a property record for '72555 Pelaw Crescent, Chester le Street, DH2 2HX'. The 'Key Control' section is highlighted with an orange circle. The 'Key Control' button is visible on the left sidebar and in the main content area. The main content area shows the property details: '3 Bed | £1500.00 pcm', 'Available', and '1 Tenant'. It also displays 'Lead landlord: Mr Lettings Landl...' and 'Lead tenant: Lettings Applica...'. Below this are buttons for 'View Landlords' and 'View Tenants'. The 'Key Control' section shows a table with columns 'Signed In By' and 'Returned By'. The table has three rows: 'Signed In', 'Signed Out', and 'Overdue'. At the bottom is a card for key 125, '7255Pelaw', with a 'Edit Key' button.

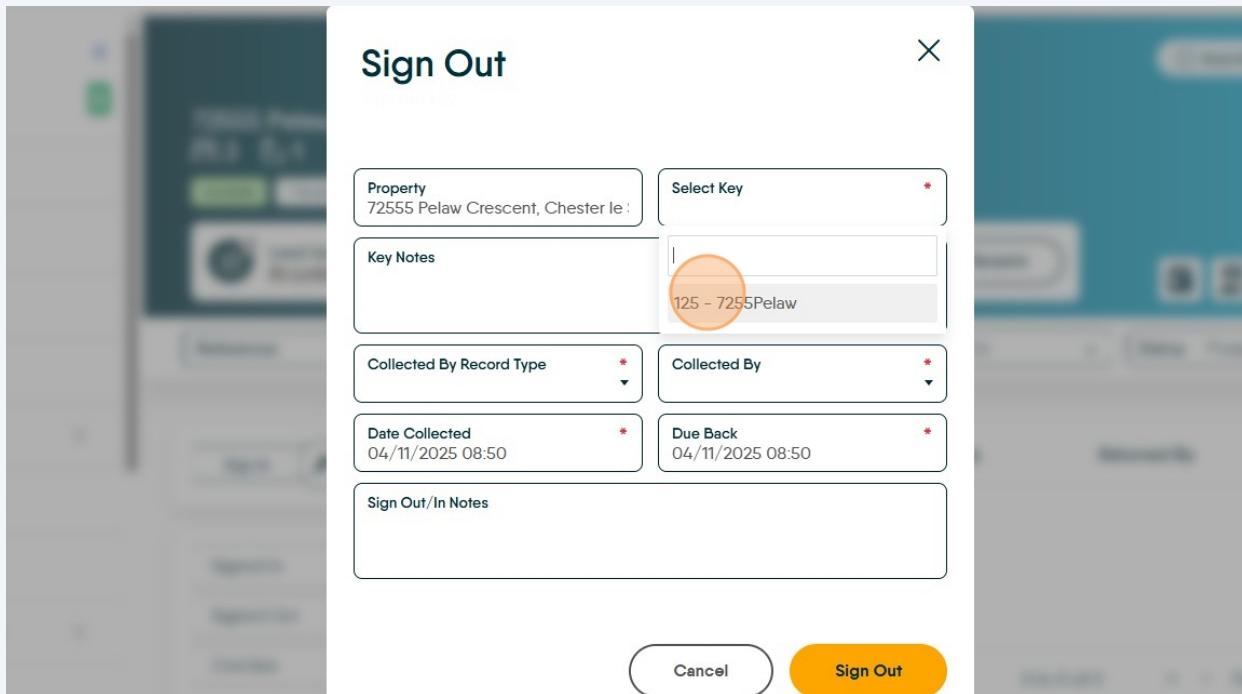
11 Click "Sign Out"



The screenshot is identical to the previous one, showing the property record for '72555 Pelaw Crescent, Chester le Street, DH2 2HX'. The 'Key Control' section is highlighted with an orange circle. The 'Key Control' button is visible on the left sidebar and in the main content area. The main content area shows the property details: '3 Bed | £1500.00 pcm', 'Available', and '1 Tenant'. It also displays 'Lead landlord: Mr Lettings Landl...' and 'Lead tenant: Lettings Applica...'. Below this are buttons for 'View Landlords' and 'View Tenants'. The 'Key Control' section shows a table with columns 'Signed In By' and 'Returned By'. The 'Sign Out' button in the table is highlighted with an orange circle. The table has three rows: 'Signed In', 'Signed Out', and 'Overdue'. At the bottom is a card for key 125, '7255Pelaw', with a 'Edit Key' button.

12

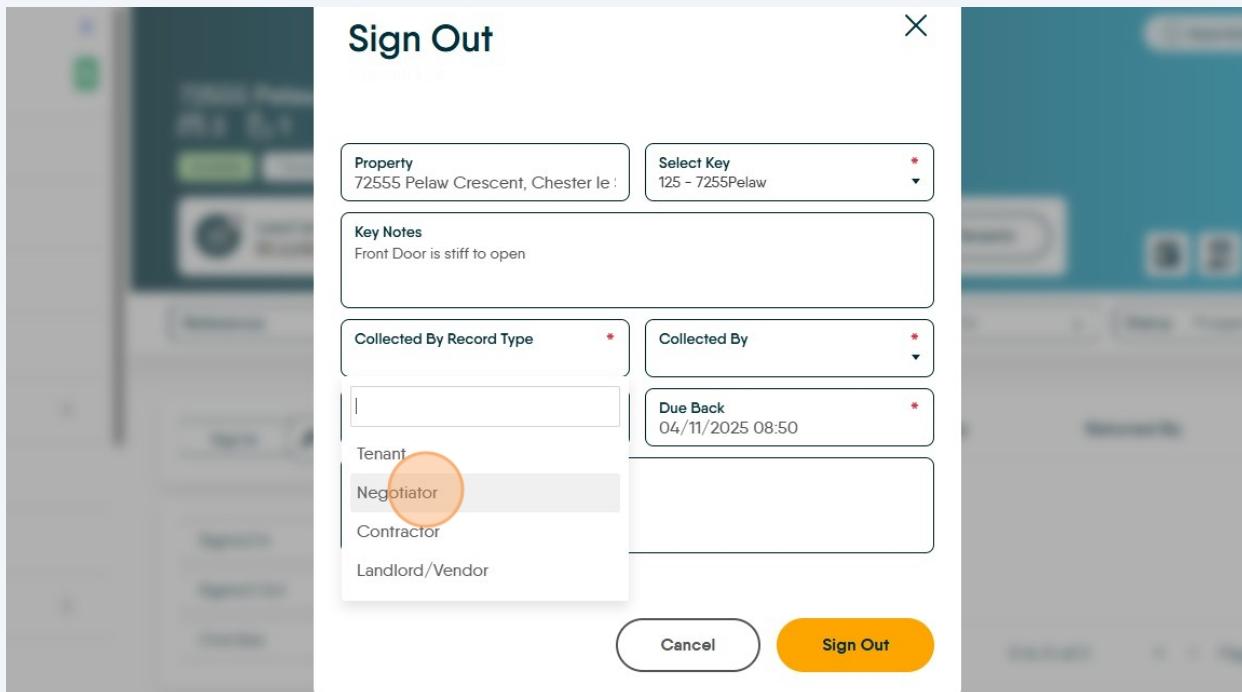
Click "**Select Key**" and select the key from the drop down list, there can be more than 1 key logged per property.



The image shows a 'Sign Out' dialog box. At the top, it says 'Sign Out' and has a close button 'X'. Below that, there are two main sections: 'Property' and 'Select Key'. The 'Property' section shows '72555 Pelaw Crescent, Chester le :'. The 'Select Key' section has a dropdown menu with '125 - 7255Pelaw' selected, highlighted with an orange circle. Below these are sections for 'Key Notes' (containing 'Front Door is stiff to open'), 'Collected By Record Type' (dropdown), 'Collected By' (dropdown), 'Date Collected' (04/11/2025 08:50), 'Due Back' (04/11/2025 08:50), and 'Sign Out/In Notes'. At the bottom are 'Cancel' and 'Sign Out' buttons.

13

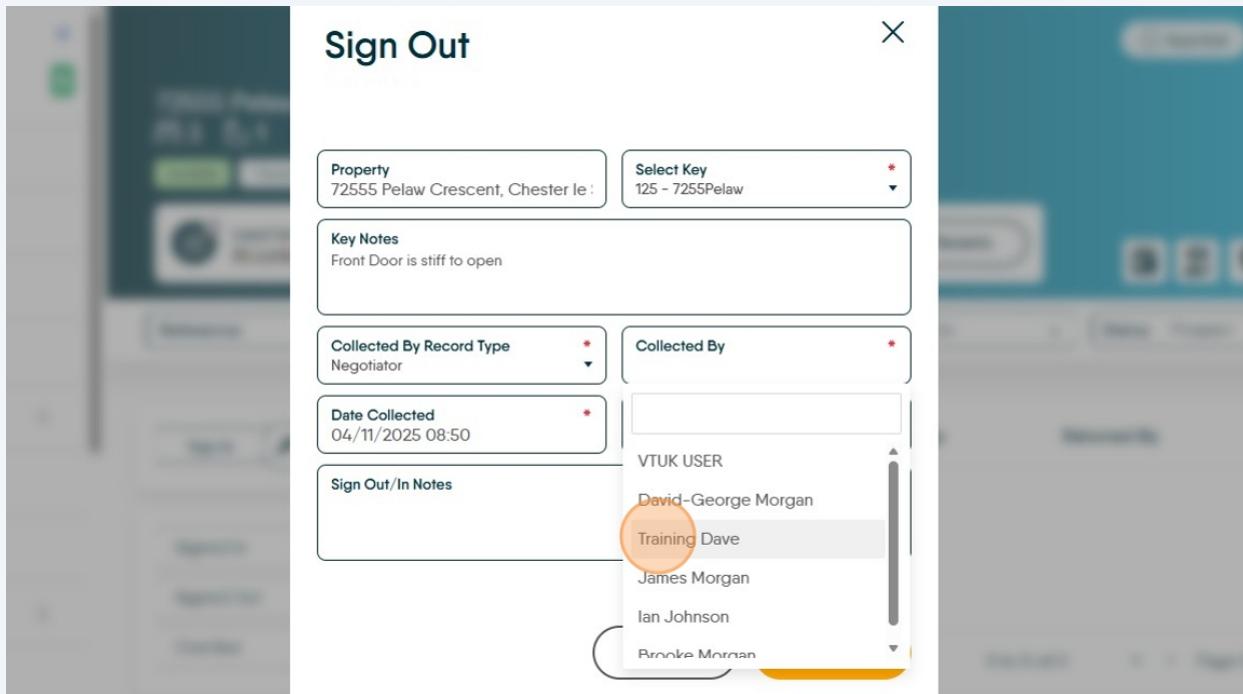
Click "**Collected By Record Type**" and select the type of person who collected the key e.g. "Negotiator"



The image shows a 'Sign Out' dialog box. At the top, it says 'Sign Out' and has a close button 'X'. Below that, there are two main sections: 'Property' and 'Select Key'. The 'Property' section shows '72555 Pelaw Crescent, Chester le :'. The 'Select Key' section has a dropdown menu with '125 - 7255Pelaw' selected. Below these are sections for 'Key Notes' (containing 'Front Door is stiff to open'), 'Collected By Record Type' (dropdown), 'Collected By' (dropdown), and 'Due Back' (04/11/2025 08:50). The 'Collected By Record Type' dropdown is open, showing options: 'Tenant', 'Negotiator' (highlighted with an orange circle), 'Contractor', and 'Landlord/Vendor'. At the bottom are 'Cancel' and 'Sign Out' buttons.

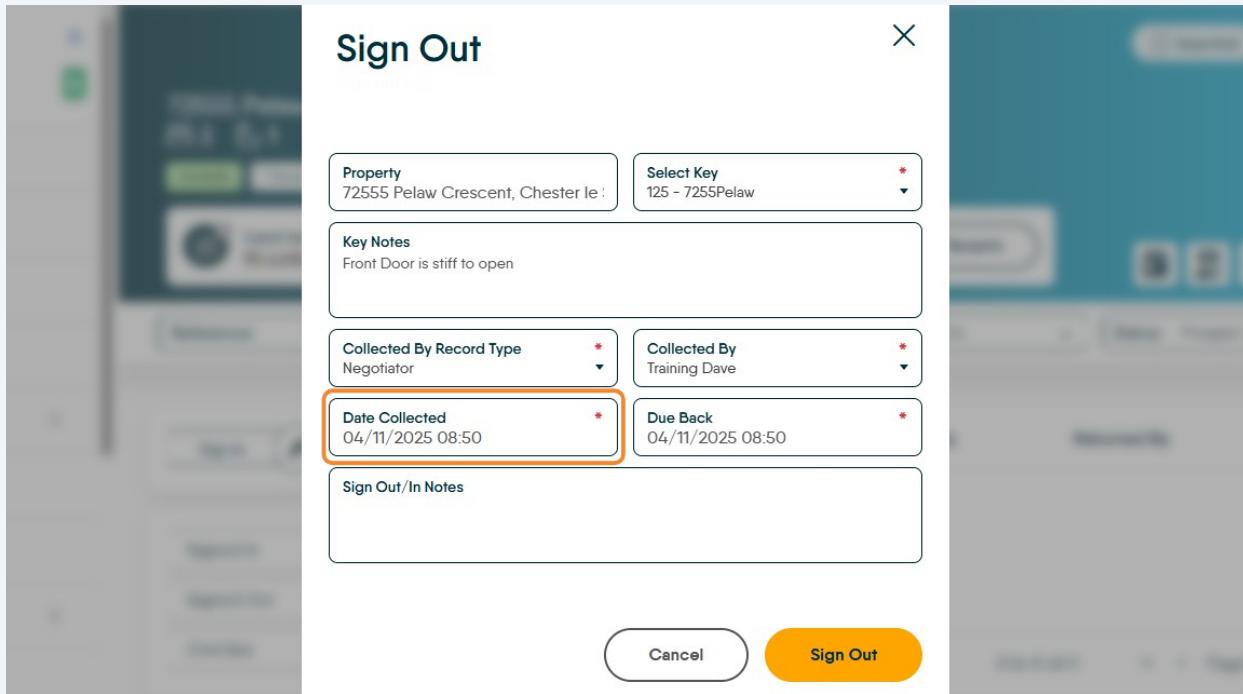
14

Click **"Collected By"** and select the name of the person collecting the key e.g. "Training Dave"



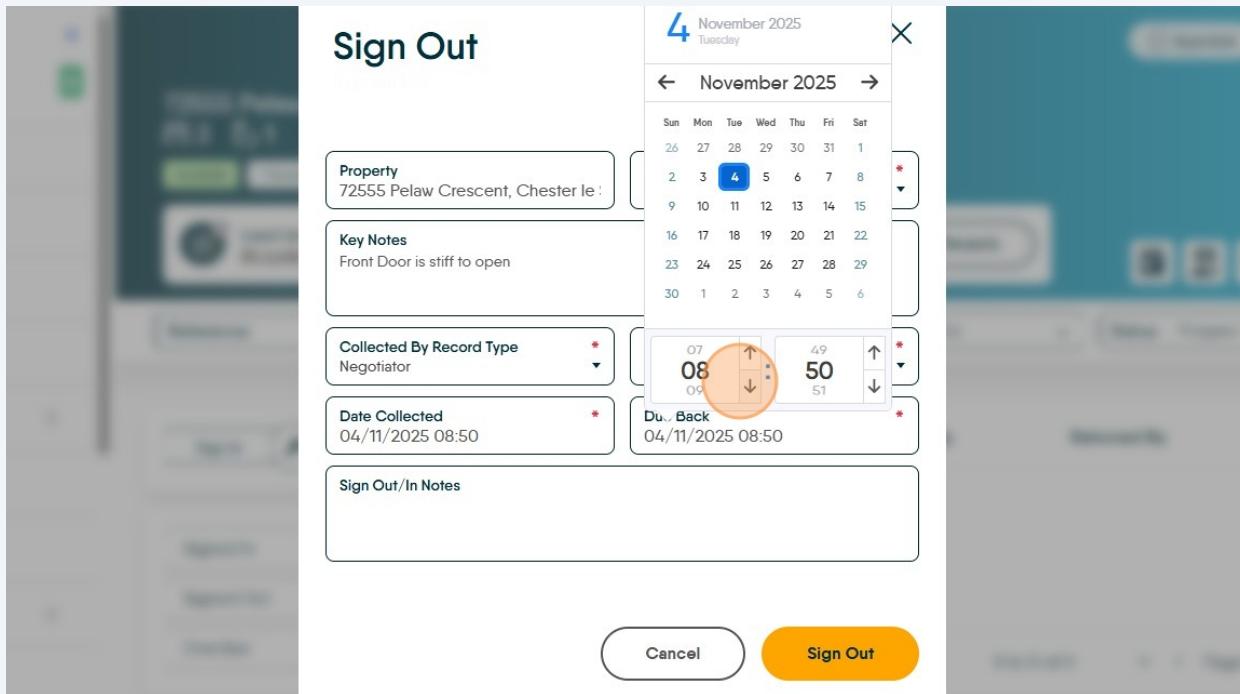
15

The **"Date Collected"** will default to the current date and time, edit this if required.



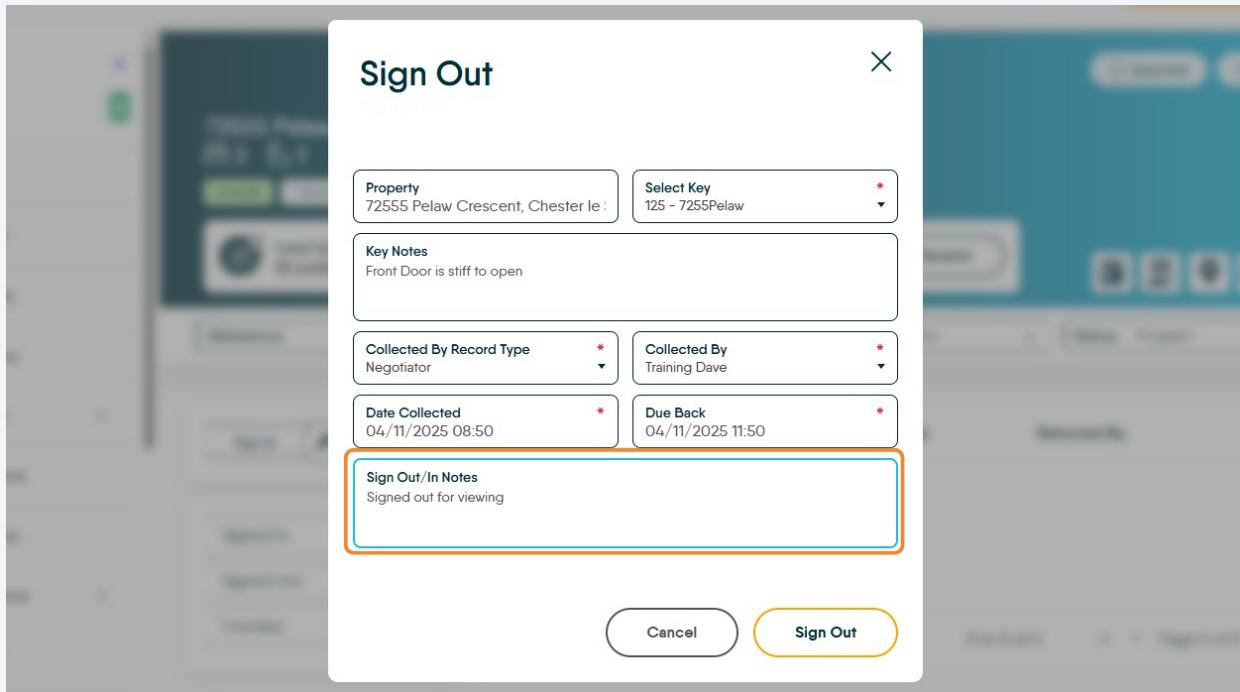
16

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.

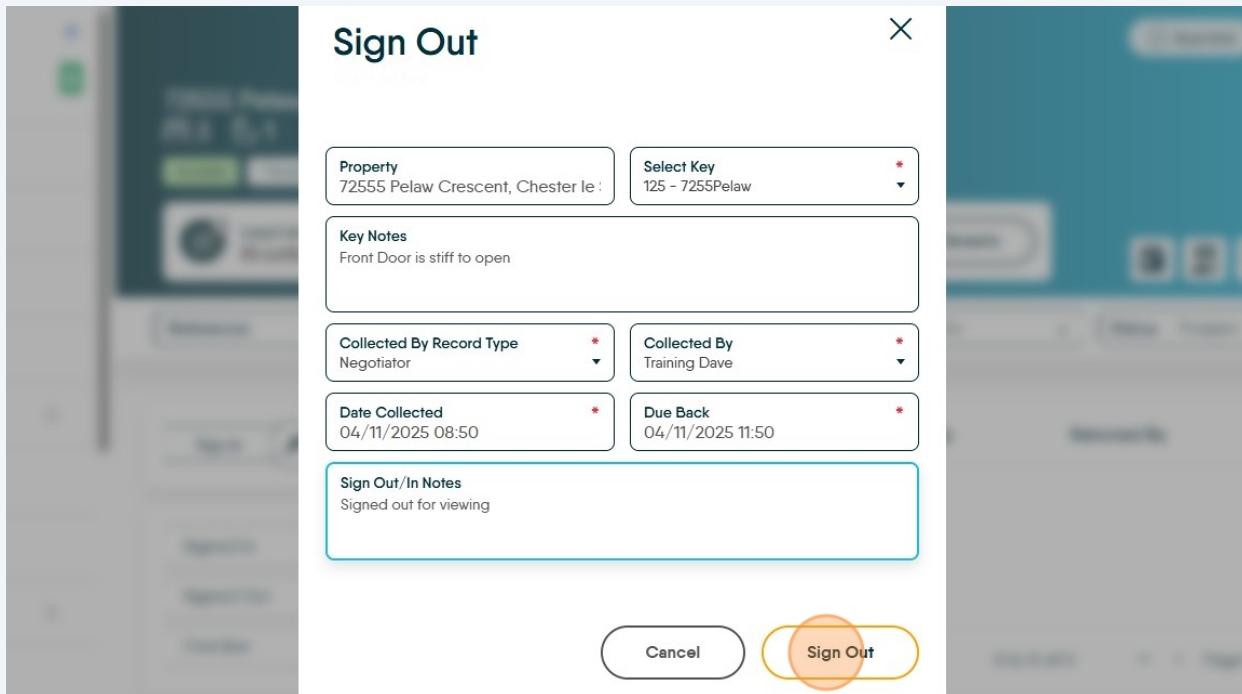


17

In the "**Signed Out/In Notes**" field add any notes about the sign out for future reference.



18 Click "Sign Out"



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.

A screenshot of the 'iam property' software interface. The top navigation bar includes 'My day', 'Lettings', 'Sales', 'Accounts', 'Reporting', 'Communications', 'My account', and a search bar. The main content area shows a property listing for '72555 Pelaw Crescent, Chester le Street, DH2 2HX' with a price of '£ 1500.00 pcm'. Below the listing are 'Available' and '1 Tenant' buttons. To the right are 'Appraisal' and 'Warning' icons. The left sidebar has sections for 'Details', 'Checklist', 'Appraisals', 'Inspections', 'Accounts', 'Compliance', 'Information', 'Maintenance', 'Payment', and 'Marketing'. In the 'Maintenance' section, there is a dropdown menu with three options: 'Signed In', 'Signed Out', and 'Overdue', which is highlighted with an orange box. The main content area also shows a table with columns for 'Key Number', 'Alias', 'Signed Out', 'Signed Out By', and 'Collected By'. The table contains one row for key number 125, alias 7255Pelaw, signed out on 04/11/2025, signed out by Training Dave, and collected by Training Dave.



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

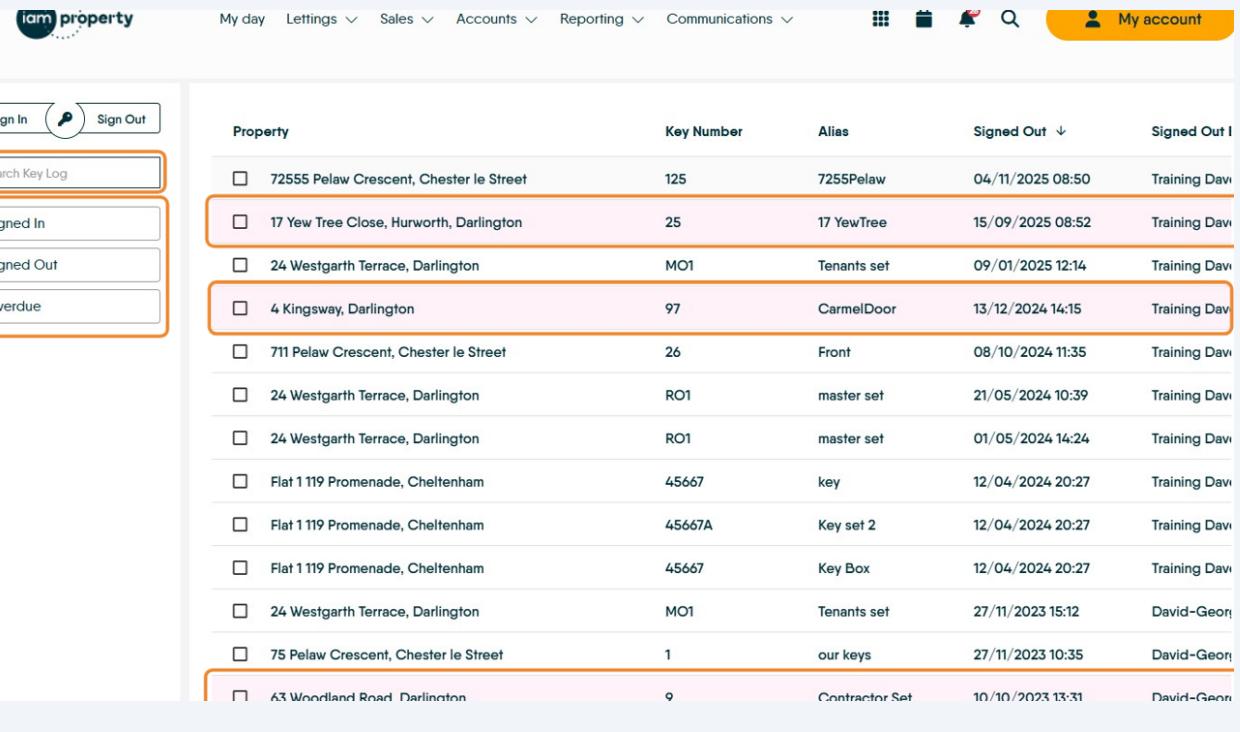
In the Activity List. Click the "Key Control" tile.

The screenshot shows the iamsold CRM interface. At the top, there is a navigation bar with links for 'My day', 'Lettings', 'Sales', 'Accounts', 'Reporting', 'Communications', 'iamproperty', 'CRM' (which is underlined in blue), 'movebutler', and 'iamsold'. Below the navigation bar is a row of six cards displaying statistics: 'Landlords' (81), 'Tenants' (60), 'Applicants' (18), 'PB Tenants' (31), 'Contractors' (30), and 'Key Control' (with an icon of a key inside a circle). The 'Key Control' card is highlighted with a yellow border. Below these cards is the 'Activity List' section. On the left, there is a sidebar with a list of activity items: 'Tenancy Review' (7), 'Public Liability' (3), 'Trade Licence Expiry' (1), 'Calls Upcoming/Outstanding' (38), 'Jobs Outstanding' (1), and 'Keys Due Back' (3). The main area of the 'Activity List' shows a placeholder message: 'Please select an activity list item to begin'. There is also a small icon of a clipboard with a key.

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.



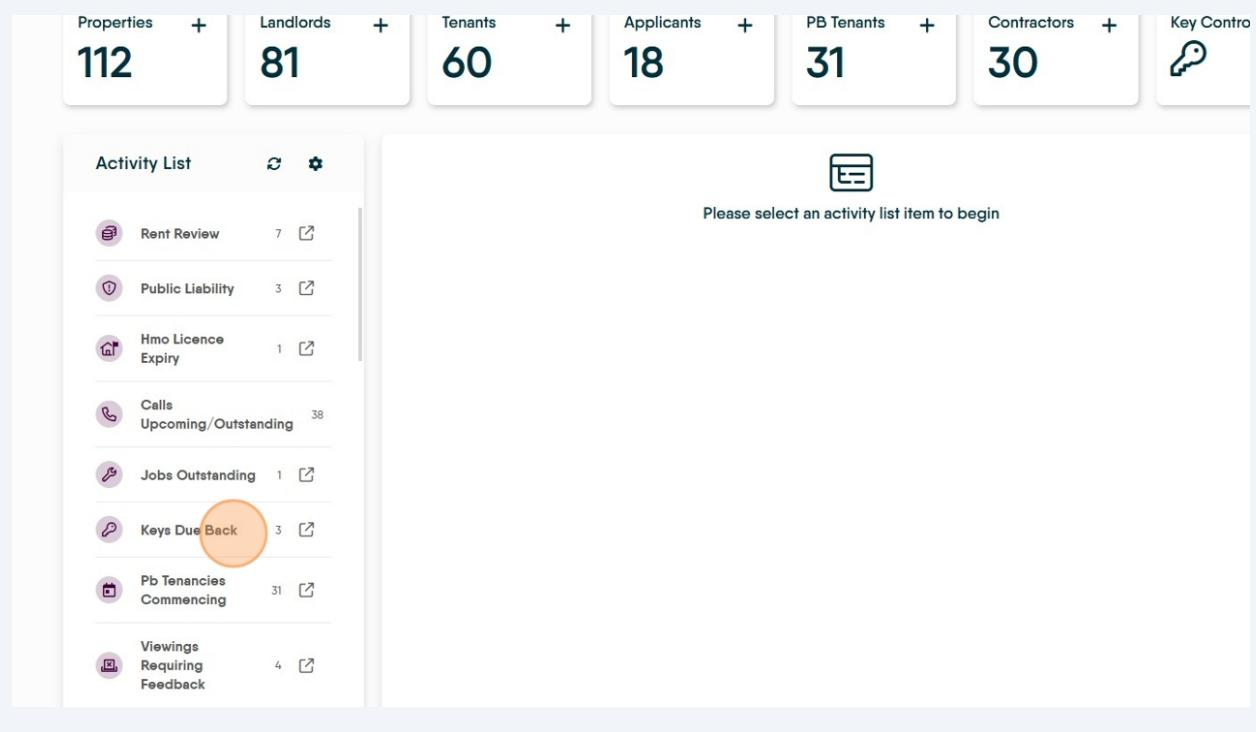
The screenshot shows the iAm Property CRM interface with the 'Key Log' menu selected. The main table displays a list of keys, with several entries highlighted in red, indicating they are over due. The columns in the table are: Property, Key Number, Alias, Signed Out, and Signed Out I. The table lists various properties and their key details, including their status and last signed-out date.

Property	Key Number	Alias	Signed Out	Signed Out I
72555 Pelaw Crescent, Chester le Street	125	7255Pelaw	04/11/2025 08:50	Training Davi
17 Yew Tree Close, Hurworth, Darlington	25	17 YewTree	15/09/2025 08:52	Training Davi
24 Westgarth Terrace, Darlington	MO1	Tenants set	09/01/2025 12:14	Training Davi
4 Kingsway, Darlington	97	CarmelDoor	13/12/2024 14:15	Training Davi
711 Pelaw Crescent, Chester le Street	26	Front	08/10/2024 11:35	Training Davi
24 Westgarth Terrace, Darlington	RO1	master set	21/05/2024 10:39	Training Davi
24 Westgarth Terrace, Darlington	RO1	master set	01/05/2024 14:24	Training Davi
Flat 1119 Promenade, Cheltenham	45667	key	12/04/2024 20:27	Training Davi
Flat 1119 Promenade, Cheltenham	45667A	Key set 2	12/04/2024 20:27	Training Davi
Flat 1119 Promenade, Cheltenham	45667	Key Box	12/04/2024 20:27	Training Davi
24 Westgarth Terrace, Darlington	MO1	Tenants set	27/11/2023 15:12	David-Geor
75 Pelaw Crescent, Chester le Street	1	our keys	27/11/2023 10:35	David-Geor
63 Woodland Road, Darlington	9	Contractor Set	10/10/2023 13:31	David-Geor

22

In the "Keys Due Back" menu

23 In the Activity List. Click "Keys Due Back"



The dashboard displays the following statistics:

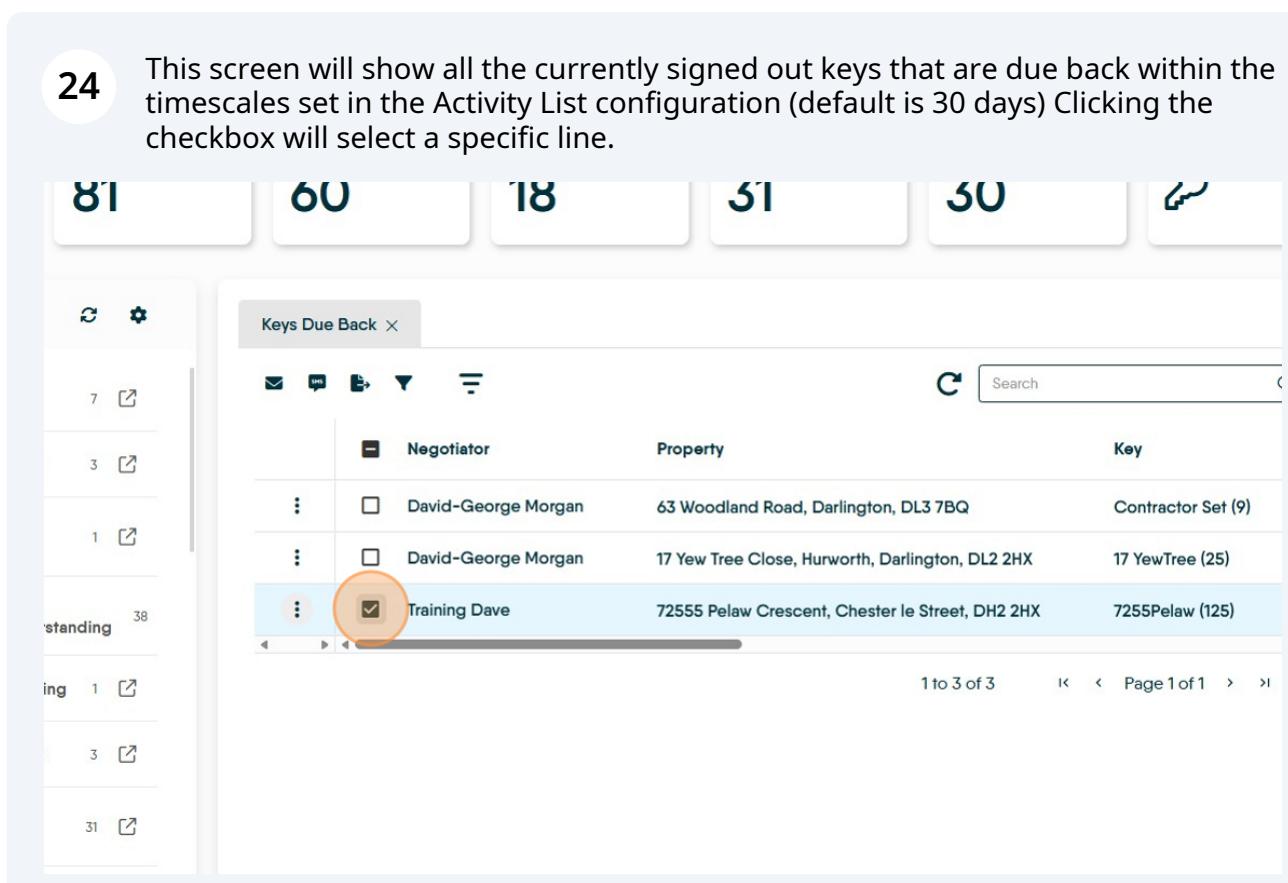
- Properties: 112
- Landlords: 81
- Tenants: 60
- Applicants: 18
- PB Tenants: 31
- Contractors: 30
- Key Control: 1

The Activity List section shows the following items:

- Rent Review: 7
- Public Liability: 3
- Hmo Licence Expiry: 1
- Calls Upcoming/Outstanding: 38
- Jobs Outstanding: 1
- Keys Due Back: 3 (highlighted with an orange circle)
- Pb Tenancies Commencing: 31
- Viewings Requiring Feedback: 4

A message at the top right of the Activity List section says: "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.



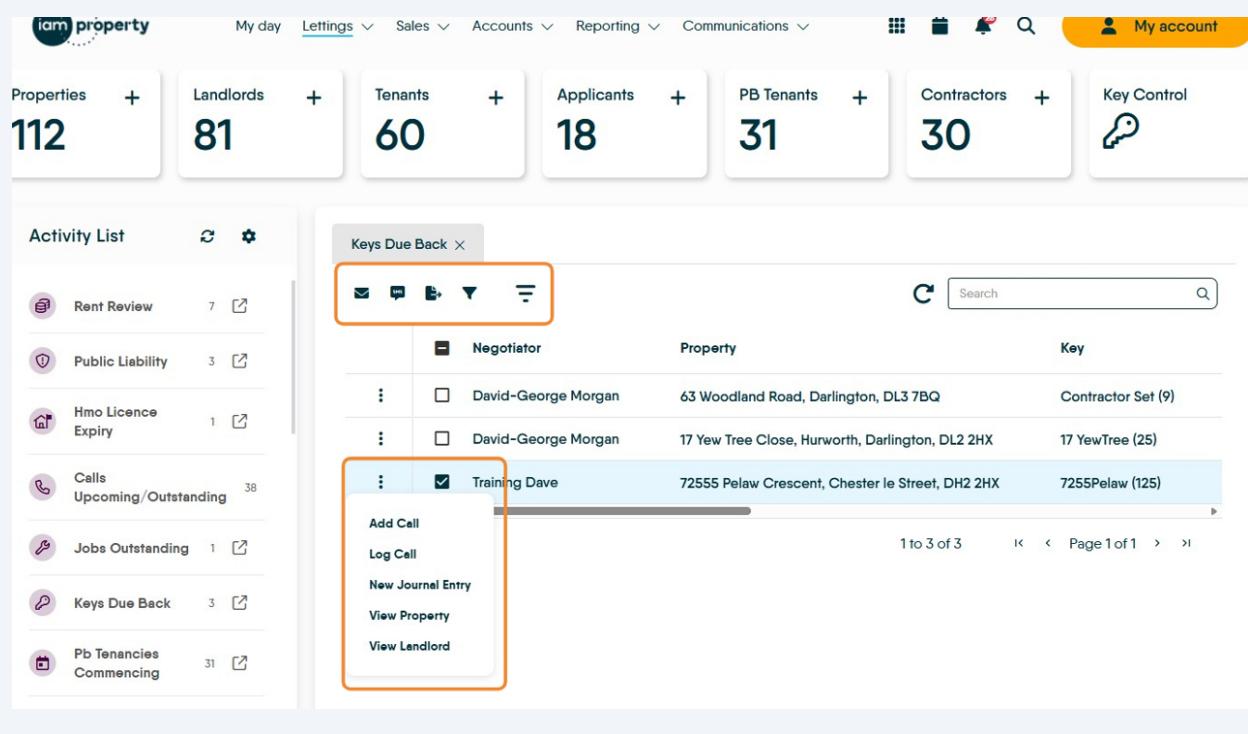
The table shows the following data:

	Negotiator	Property	Key
7	David-George Morgan	63 Woodland Road, Darlington, DL3 7BQ	Contractor Set (9)
3	David-George Morgan	17 Yew Tree Close, Hurworth, Darlington, DL2 2HX	17 YewTree (25)
1	Training Dave	72555 Pelaw Crescent, Chester le Street, DH2 2HX	7255Pelaw (125)

A checkbox in the first column of the third row is highlighted with an orange circle.

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.



Activity List

Keys Due Back

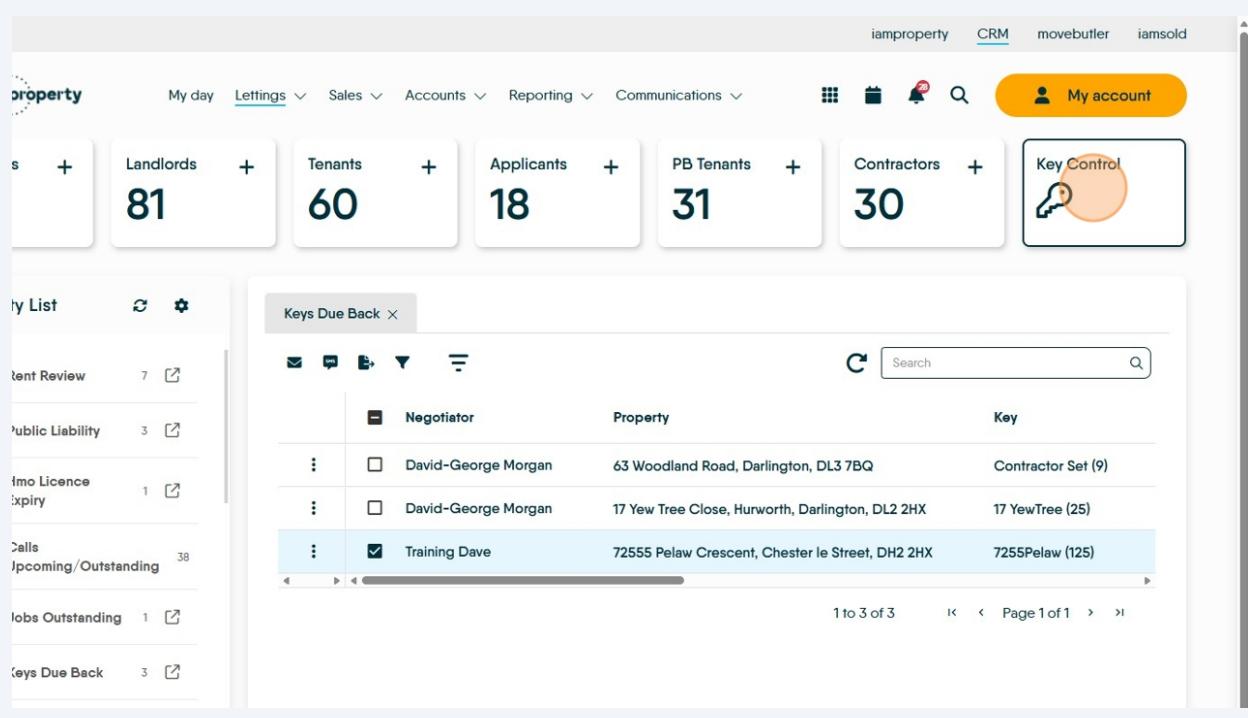
Negotiator	Property	Key
David-George Morgan	63 Woodland Road, Darlington, DL3 7BQ	Contractor Set (9)
David-George Morgan	17 Yew Tree Close, Hurworth, Darlington, DL2 2HX	17 YewTree (25)
Training Dave	72555 Pelaw Crescent, Chester le Street, DH2 2HX	7255Pelaw (125)

Add Cell
Log Cell
New Journal Entry
View Property
View Landlord

Logging a Key Back Into CRM

26

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



Activity List

Keys Due Back

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)

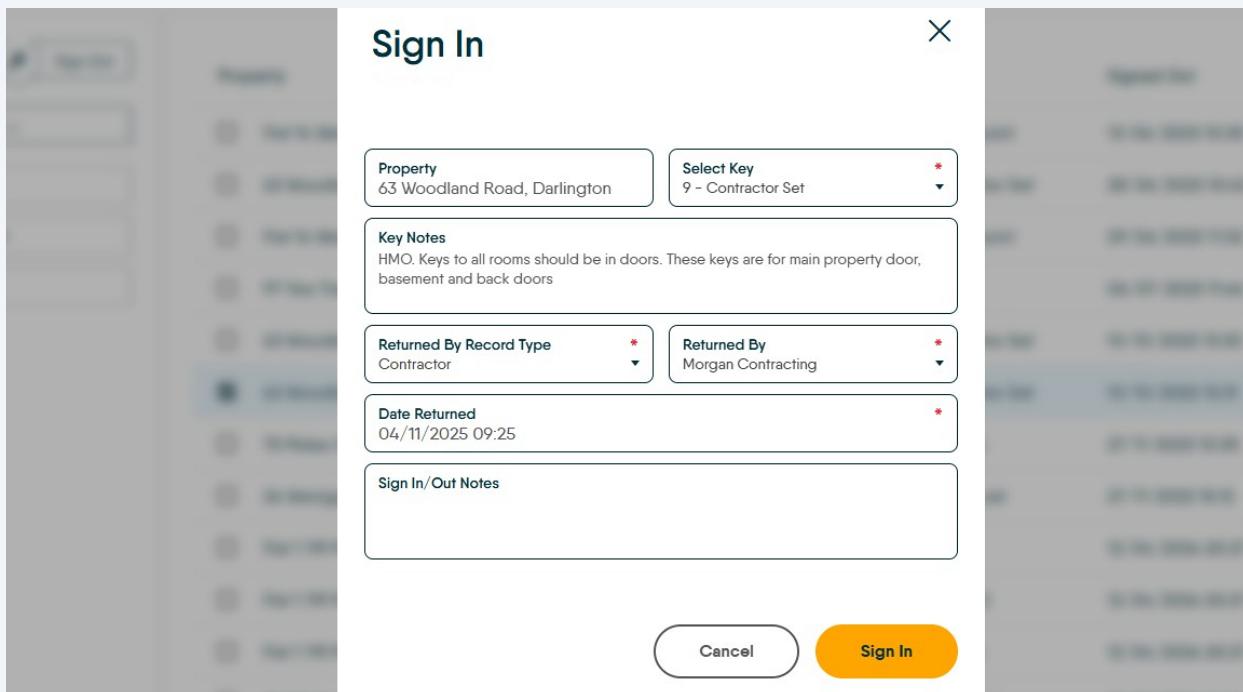
27 In the Key Control sections, select the key

Property	Key Number	Alias	Signed Out	Status
Flat 14 Westpoint, Northumberland Street, Darlington	8	14Westpoint	13/06/2023 10:30	De
63 Woodland Road, Darlington	9	Contractor Set	28/06/2023 10:43	De
Flat 14 Westpoint, Northumberland Street, Darlington	8	14Westpoint	29/06/2023 11:02	De
97 Yew Tree Close, Hurworth, Darlington	56	4yew	06/07/2023 11:46	De
63 Woodland Road, Darlington	9	Contractor Set	10/10/2023 13:30	De
63 Woodland Road, Darlington	9	Contractor Set	10/10/2023 13:31	De
75 Pelaw Crescent, Chester le Street	1	our keys	27/11/2023 10:35	De
24 Westgarth Terrace, Darlington	MO1	Tenants set	27/11/2023 15:12	De
Flat 1119 Promenade, Cheltenham	45667	key	12/04/2024 20:27	Tr
Flat 1119 Promenade, Cheltenham	45667A	Key set 2	12/04/2024 20:27	Tr
Flat 1119 Promenade, Cheltenham	45667	Key Box	12/04/2024 20:27	Tr
24 Westgarth Terrace, Darlington	RO1	master set	01/05/2024 14:24	Tr
24 Westgarth Terrace, Darlington	RO1	master set	21/05/2024 10:39	Tr
75 Pelaw Crescent, Chester le Street	1	our keys	22/05/2024 10:35	Tr

28 Click "Sign In"

Property	Key Number	Alias	Signed Out	Status
Flat 14 Westpoint, Northumberland Street, Darlington	8	14Westpoint	13/06/2023 10:30	De
63 Woodland Road, Darlington	9	Contractor Set	28/06/2023 10:43	De
Flat 14 Westpoint, Northumberland Street, Darlington	8	14Westpoint	29/06/2023 11:02	De
97 Yew Tree Close, Hurworth, Darlington	56	4yew	06/07/2023 11:46	De
63 Woodland Road, Darlington	9	Contractor Set	10/10/2023 13:30	De
63 Woodland Road, Darlington	9	Contractor Set	10/10/2023 13:31	De
75 Pelaw Crescent, Chester le Street	1	our keys	27/11/2023 10:35	De
24 Westgarth Terrace, Darlington	MO1	Tenants set	27/11/2023 15:12	De
Flat 1119 Promenade, Cheltenham	45667	key	12/04/2024 20:27	Tr
Flat 1119 Promenade, Cheltenham	45667A	Key set 2	12/04/2024 20:27	Tr
Flat 1119 Promenade, Cheltenham	45667	Key Box	12/04/2024 20:27	Tr

29 This "Sign In" screen will show.

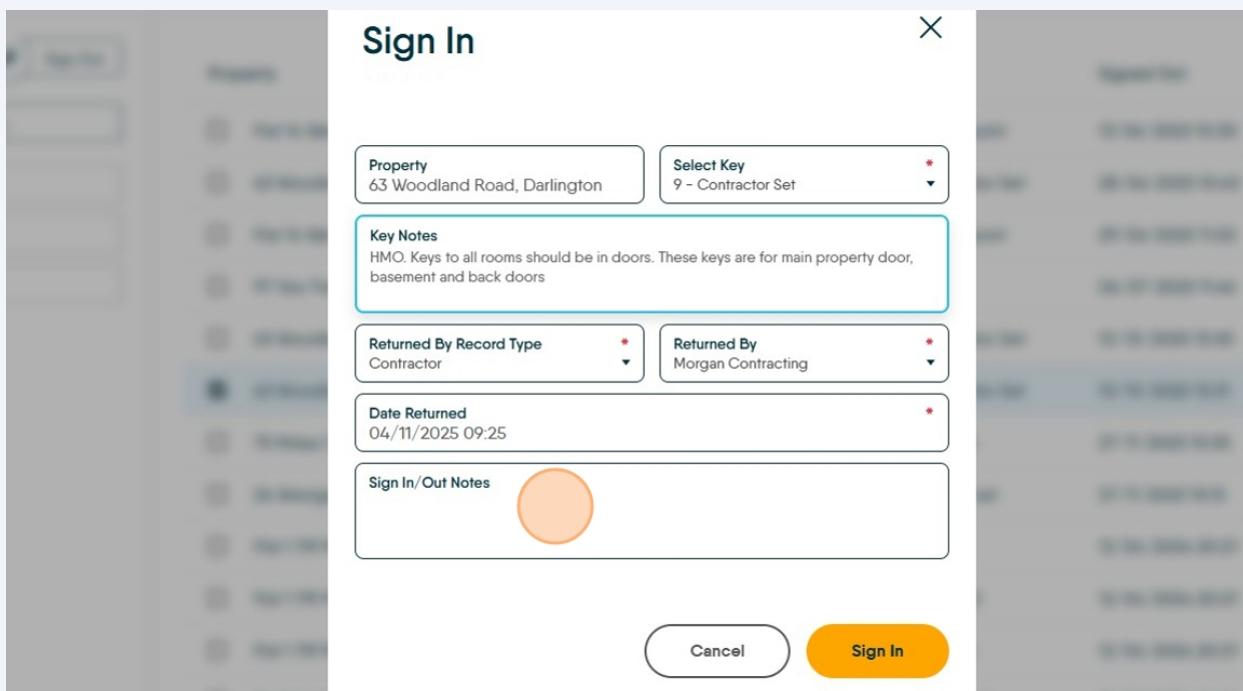


The image shows a mobile application's "Sign In" screen. The title "Sign In" is at the top center. In the top right corner is a close button (X). The screen contains several input fields and sections:

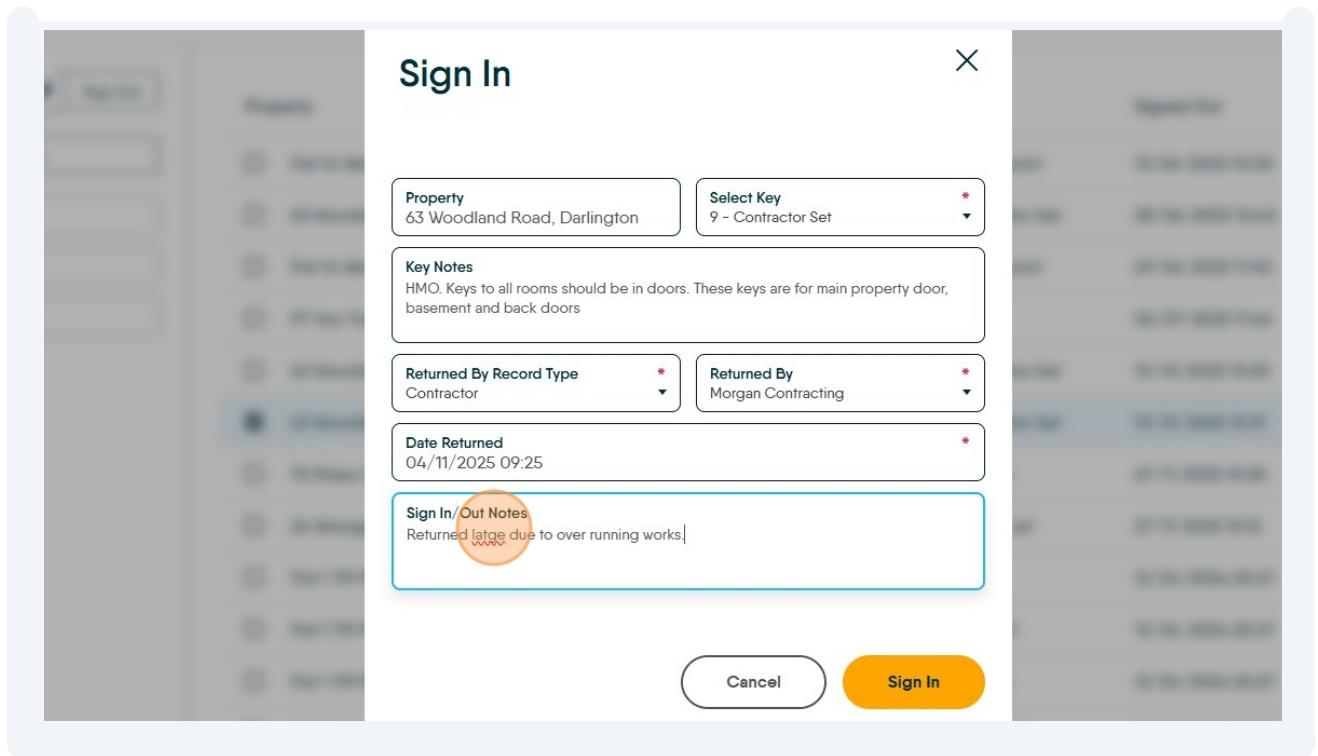
- Property:** 63 Woodland Road, Darlington
- Select Key:** 9 - Contractor Set
- Key Notes:** HMO. Keys to all rooms should be in doors. These keys are for main property door, basement and back doors.
- Returned By Record Type:** Contractor
- Returned By:** Morgan Contracting
- Date Returned:** 04/11/2025 09:25
- Sign In/Out Notes:** (This field is empty and highlighted with a light blue border in the screenshot.)

At the bottom are two buttons: "Cancel" (gray) and "Sign In" (yellow).

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



The image shows the same "Sign In" screen as the previous one, but with a note added to the "Sign In/Out Notes" field. The note reads: "HMO. Keys to all rooms should be in doors. These keys are for main property door, basement and back doors". This note is highlighted with a light blue border. The rest of the screen is identical to the first one.

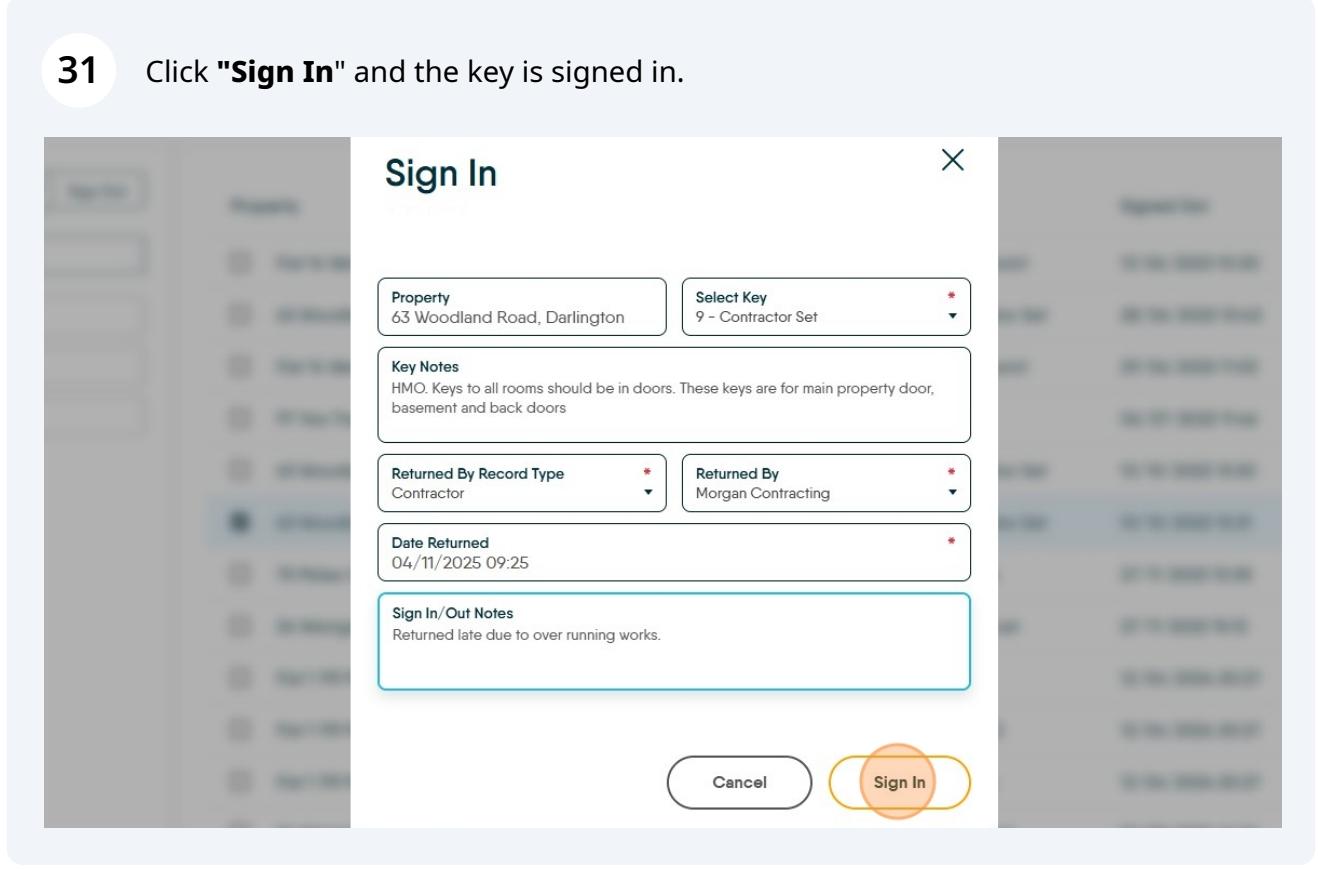


The image shows a 'Sign In' dialog box. At the top, it says 'Sign In' and has a close button 'X'. The form fields are as follows:

- 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:** Returned late due to over running works.

At the bottom are 'Cancel' and 'Sign In' buttons, with 'Sign In' being highlighted with a yellow oval.

31 Click "**Sign In**" and the key is signed in.



The image shows the same 'Sign In' dialog box as the previous one, but with the 'Sign In' button highlighted with a yellow oval. The rest of the form fields and notes are identical to the first image.

32 **Sign in via Property Record.**

33 Click "Key Control"

Live Jobs 0

EPC Rating B

- Details
- Checklist
- Appraisals
- Inspections
- Accounts >
- Compliance
- Information
- mantenance >
- 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: £0.00

Estimated Rental Value: £0.00

Agreement Name

Scheduled Management Fee

34 Click "Sign In"

Live Jobs 0

EPC Rating B

- Details
- Checklist
- Appraisals
- Inspections
- Accounts >
- Compliance
- Information
- mantenance >
- Payment
- Marketing
- Key Control

72555 Pelaw Crescent, Chester le Street, DH2 2HX | 3 Bed | £1500.00 pcm

Available 1 Tenant

Lead landlord: Mr Lettings Landl... View Landlords

Lead tenant: Lettings Applica... View Tenants

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

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

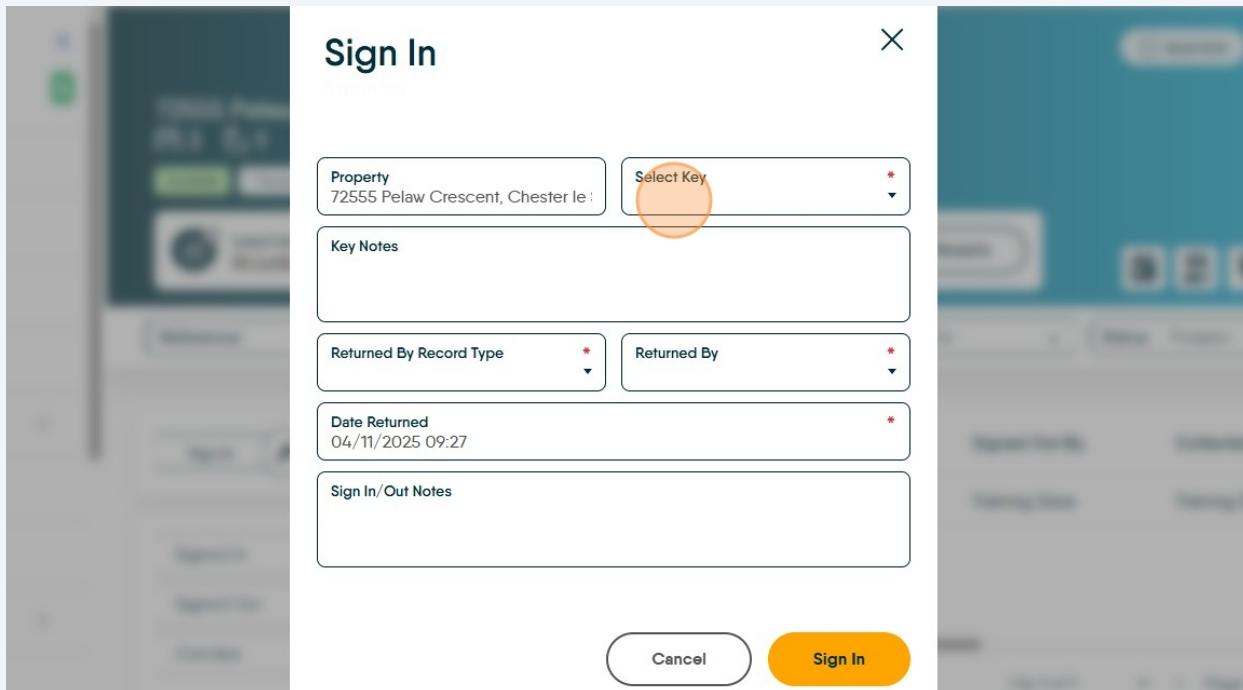
Signed In

Signed Out

Overdue

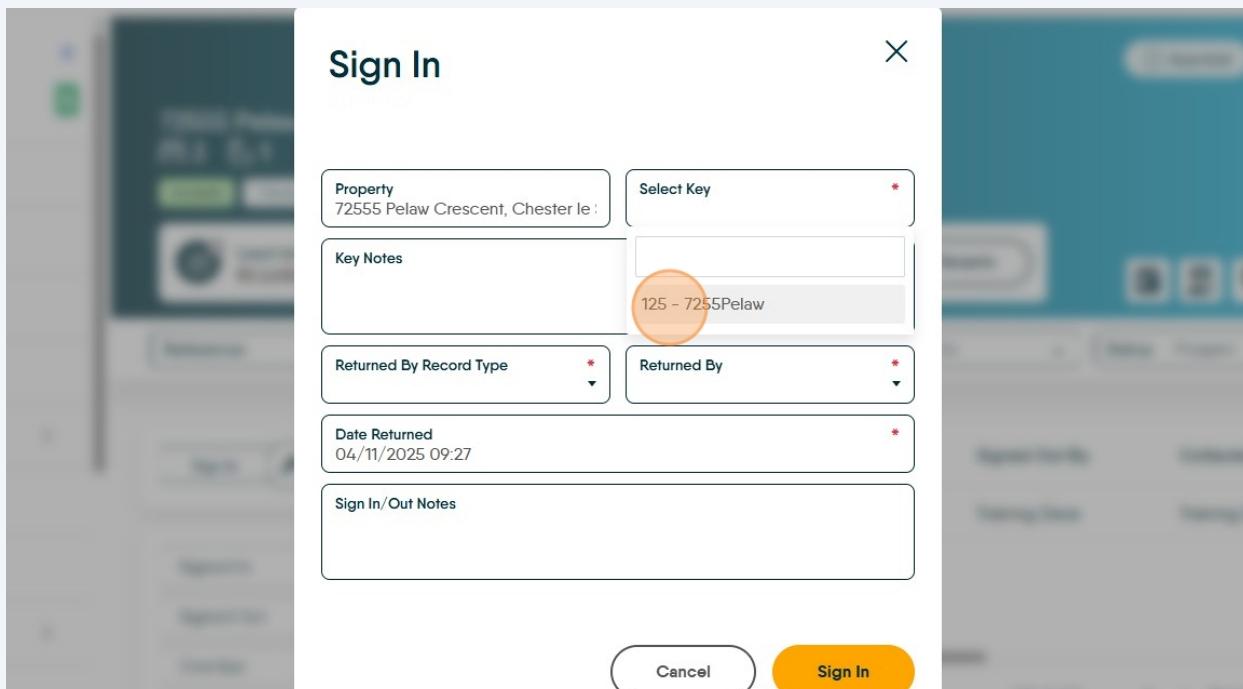
125 7255Pelaw Add Key

35 Click here to select the key you are signing back in as there can be multiple keys.



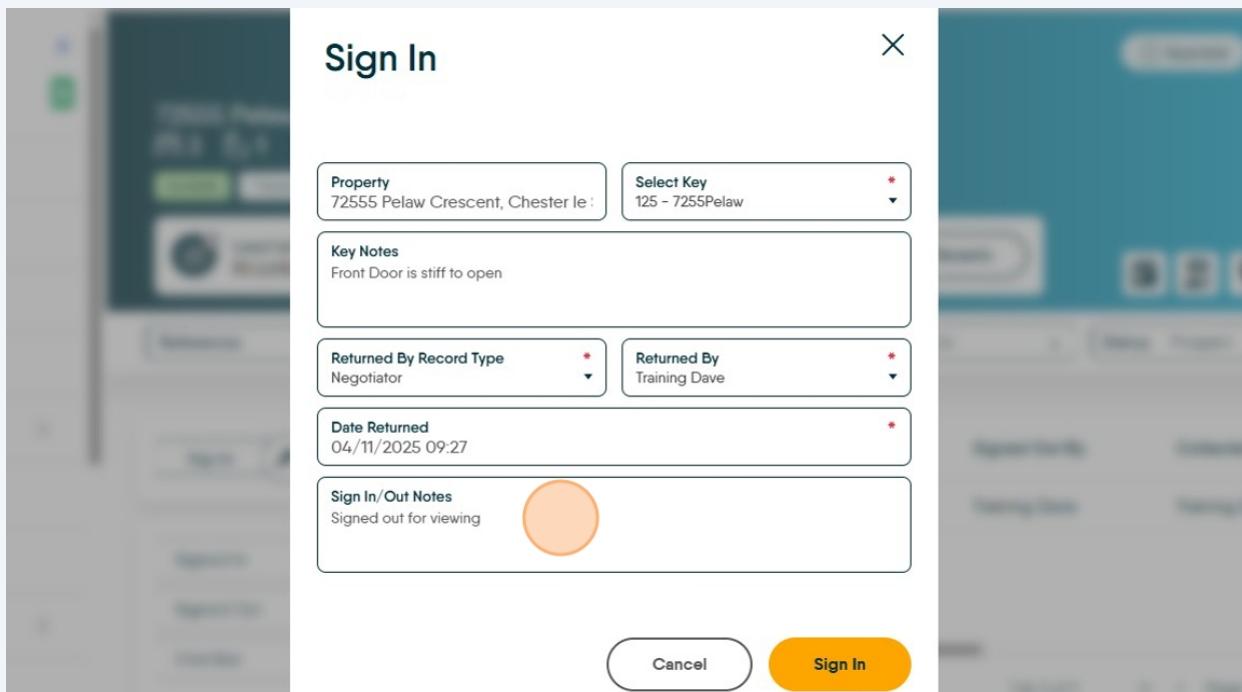
The image shows a 'Sign In' dialog box. At the top, it says 'Sign In' and has a close button 'X'. Below that is a 'Property' field containing '72555 Pelaw Crescent, Chester le :'. To its right is a 'Select Key' dropdown menu, which is highlighted with an orange circle. The next section is 'Key Notes'. Below that are two dropdowns: 'Returned By Record Type' and 'Returned By'. The following section is 'Date Returned' with the value '04/11/2025 09:27'. The final section is 'Sign In/Out Notes'. At the bottom are 'Cancel' and 'Sign In' buttons, with 'Sign In' being orange.

36 Click the key you are signing back in e.g. "125 - 7255Pelaw"



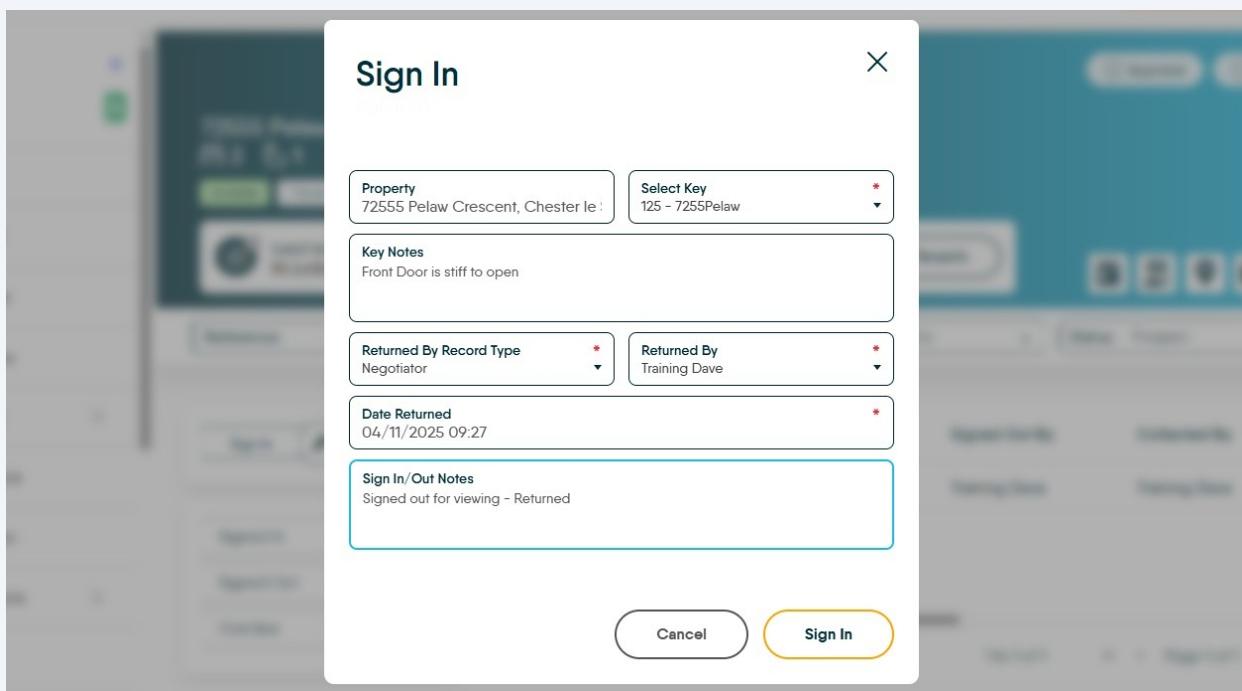
The image shows the same 'Sign In' dialog box as the previous image, but with a key difference: the 'Select Key' dropdown menu now contains the value '125 - 7255Pelaw', which is highlighted with an orange circle. The rest of the fields and layout are identical to the first image.

37 In "Sign in/Out Notes" add some detail to why, who etc the key is signed in.



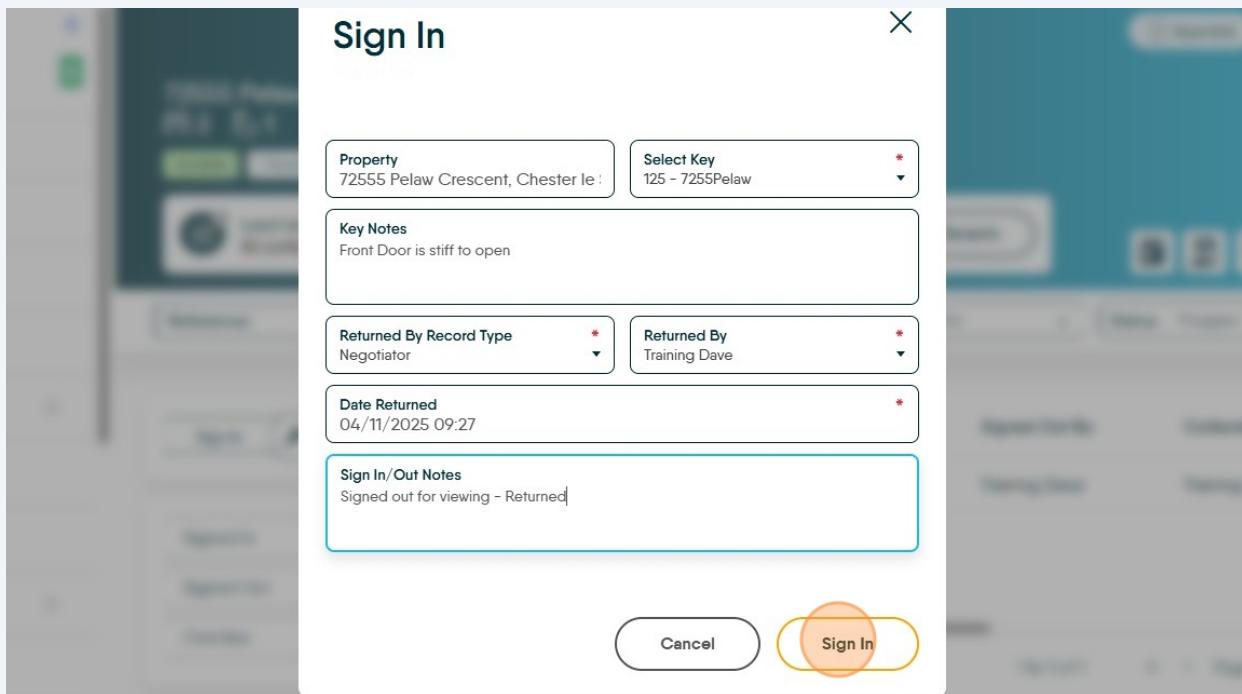
The image shows a mobile application's "Sign In" dialog box. The dialog has a white background with rounded corners and a thin black border. At the top center is the title "Sign In" in a dark teal font. In the top right corner is a small "X" icon. The dialog is divided into several sections by thin horizontal lines. The first section contains two input fields: "Property" (7255 Pelaw Crescent, Chester le :) and "Select Key" (125 - 7255Pelaw). The second section is a "Key Notes" field containing the text "Front Door is stiff to open". The third section contains two dropdowns: "Returned By Record Type" (set to "Negotiator") and "Returned By" (set to "Training Dave"). The fourth section is a "Date Returned" field showing "04/11/2025 09:27". The fifth section is a "Sign In/Out Notes" field containing the text "Signed out for viewing". This notes field is highlighted with a light orange circle. At the bottom of the dialog are two buttons: "Cancel" (gray) and "Sign In" (orange).

38 In "Sign In/Out Notes" Update the notes e.g. Type " - Returned"



The image shows the same mobile application's "Sign In" dialog box as the previous image, but with a change in the "Sign In/Out Notes" field. The notes now read "Signed out for viewing - Returned". This update is highlighted with a light blue circle. The rest of the dialog box remains the same, with the "Sign In" button being orange.

39 Click "Sign In"



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

