

Booking a Property Inspection in the Property Record and Updating Tenancy Details



This guide provides a step-by-step process for booking property inspections from within the Property record and updating tenancy details efficiently within the CRM system.

By following these instructions, users can ensure timely property visits and maintain accurate records, which are crucial for effective property management. The clarity of the steps helps streamline the workflow, saving time and reducing errors in managing tenant information.



Tip! If you are using CRM Inspections module this process will add the Inspection to the Inspection module record as well as into the Property record.

1

There are 2 places you can start this process

1. From the Activity List, using the "Property Visits Due" option. This will show all property visits due in the next 30 days (or overdue), this is the default setting and can be changed. Using the 3-dot menu to navigate to the property record to add the inspection record.

2. From the Property record and adding to the Inspections tab.

Both options are shown below, they start differently but complete the same way.

2

To manage Inspections from the Lettings Dashboard. Navigate to <https://crm.iamproperty.com/Dashboards/Lettings>

The screenshot shows the IAM Property CRM interface. At the top, there's a navigation bar with 'My day', 'Lettings', 'Sales', 'Accounts', 'Reporting', and 'Communications'. Below this is a row of seven cards: 'Properties' (165), 'Landlords' (189), 'Tenants' (126), 'Applicants' (699), 'PB Tenants' (12), 'Contractors' (41), and 'Key Control' (with a key icon). Below the cards is an 'Activity List' on the left and a large empty area on the right with a message 'Please select an activity list item to begin'.

Activity	Count
Jobs Outstanding	5
Keys Due Back	10
Pb Tenancies Commencing	8
Viewings Requiring Feedback	28
Property Visits Due	34
Tenancy Agreements Expiring	12

3

Click **"Property Visits Due"** this will show you all the property visits that are due within the next (by default) 30 days. This timescale can be extended or shortened.

This screenshot is identical to the first one, but with an orange circle highlighting the 'Property Visits Due' item in the Activity List. The item shows a count of 34.

Activity	Count
Jobs Outstanding	5
Keys Due Back	10
Pb Tenancies Commencing	8
Viewings Requiring Feedback	28
Property Visits Due	34
Tenancy Agreements Expiring	12
Accounts Overdue	3

4 Click here.

Properties

165

Landlords

189

Tenants

126

Applicants

699

PB Tenants

12

Contractors

41

Key Control

Activity List

Jobs Outstanding

5

Keys Due Back

10

Pb Tenancies Commencing

8

Viewings Requiring Feedback

28

Property Visits Due

34

Tenancy Agreements Expiring

12

Accounts Overdue

3

Property Visits Due

✉

💬

📄

🔍

⌵

🔄

Search

	☐	Negotiator	Primary Tenant	Property
⋮	☐	VTUK USER	Megan Roberts	69 Wedgewood Road, Hitchin SG4 0HB
⋮	☐	VTUK USER	James Burgin	9, Woolgrove Court Woolgrove Road, Hitchin SG4 0E
⋮	☐	VTUK USER	Kieron Tasker	31, St Faiths Close, Hitchin SG4 OAX
⋮	☐	Trupti Mahida-Dicocco	Dean Kellam	115, East Wing Kingsley Avenue, Fairfield Park SG5 4F
⋮	☐	VTUK USER	Sofia Andrade	10b, South Place, Hitchin SG5 2NN
⋮	☐	VTUK USER	Adam Brunetti	13 Tedder Avenue, Henlow SG16 6HN
⋮	☐	VTUK USER	Lavinia Veciunca	12 Constantine Place, Baldock SG7 6ST
⋮	☐	VTUK USER	Alan Slingsby	12, Grove Court Church End, Arlesey SG15 6UZ

5 Click "View Property"

Properties

165

Landlords

189

Tenants

126

Applicants

699

PB Tenants

12

Contractors

41

Key Control

Activity List

Jobs Outstanding

5

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Property Visits Due

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⌵

🔄

Search

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			Lavinia Veciunca	12 Constantine Place, Baldock SG7 6ST
			Alan Slingsby	12, Grove Court Church End, Arlesey SG15 6UZ
⋮	☐	VTUK USER	Matthew Gigg	7, Broom Hall High Street, Broom SG18 9ND

Add Call (Tenant)

Log Call (Tenant)

Send Group Email (Tenancy)

Send Group SMS (Tenancy)

Add Journal (Tenancy)

View Tenant

View Property

View Landlord

View Tenancy

6 OR Navigate directly to the Property record

7 Once in the Property record, scroll down the left menu. Click "Inspections"

The screenshot displays the 'iam property' management system interface. On the left, a vertical sidebar contains various menu items: 'Live Jobs' (0), 'EPC Rating' (C), 'Details', 'Checklist', 'Appraisals', 'Inspections' (highlighted with an orange circle), 'Accounts', 'Compliance', 'Information', 'maintenance', 'Payment', and 'Marketing'. The main content area is divided into three sections. The top section features a large photograph of a brick residential building, with a row of smaller interior photos below it. The middle section, titled 'COMMERCIAL', includes a 'Commercial Unit' toggle switch and three selectable options: 'Exempt' (checked), 'Inclusive', and 'Exclusive', each with a brief description of VAT treatment. The bottom section, titled 'Property Information', contains several data fields: 'Postcode' (SG4 0HB), 'Fully managed' status, 'Rent collect' status, 'Let only' status, 'Management Fee' (10.8), 'Upfront Letting Fee' (£0), 'Regular Letting Fee' (£0), 'Authorised Expense Amount' (£0.00), 'Estimated Rental Value' (£0.00), and 'Agreement Name' (Mrs Connie Eidmans).

8 To add a totally new inspection. Click **"Add Inspection"**

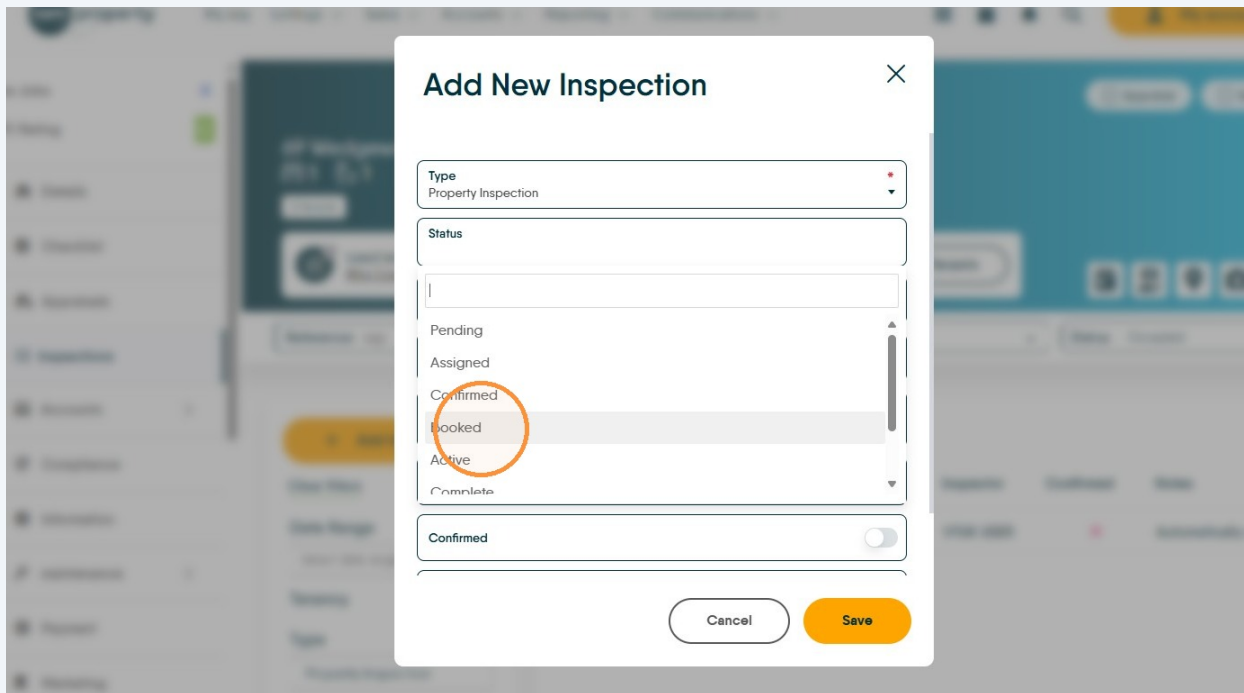
The screenshot shows a software interface for property management. On the left is a sidebar with navigation options: Live Jobs, EPC Rating, Details, Checklist, Appraisals, Inspections (highlighted), Accounts, Compliance, Information, maintenance, Payment, Marketing, and Key Control. The main area displays property details for '69 Wedgewood Road, Hitchin, SG4 0HB' with 2 tenants, a lead landlord 'Mrs. Connie Fidd...', and a lead tenant 'Miss Megan Rob...'. Below this are filters for Reference (P83), Negotiator (VTUK USER), Branch (Masons), and Status (Occupied). A '+ Add Inspection' button is circled in orange. To its right is a search bar and a table with columns: Date, Type, Status, Inspector, Confirmed, and Notes. The table contains one entry: 28/10/2025, Property Inspection, Pending, VTUK USER, with a red 'x' in the Confirmed column and 'Automati' in the Notes column.

9 Click **"Type"** and from the drop down menu select the appropriate Inspection type in this case "Property Inspection"

The screenshot shows a modal form titled 'Add New Inspection'. It has a 'Type' dropdown menu with a list of options: Check In, New Property Check, Property Inspection (circled in orange), Check Out, Inventory Check, and Maintenance Inspection. Below the dropdown is a 'Notes' field with the placeholder 'Enter notes' and a 'Confirmed' toggle switch. At the bottom are 'Cancel' and 'Save' buttons.

10

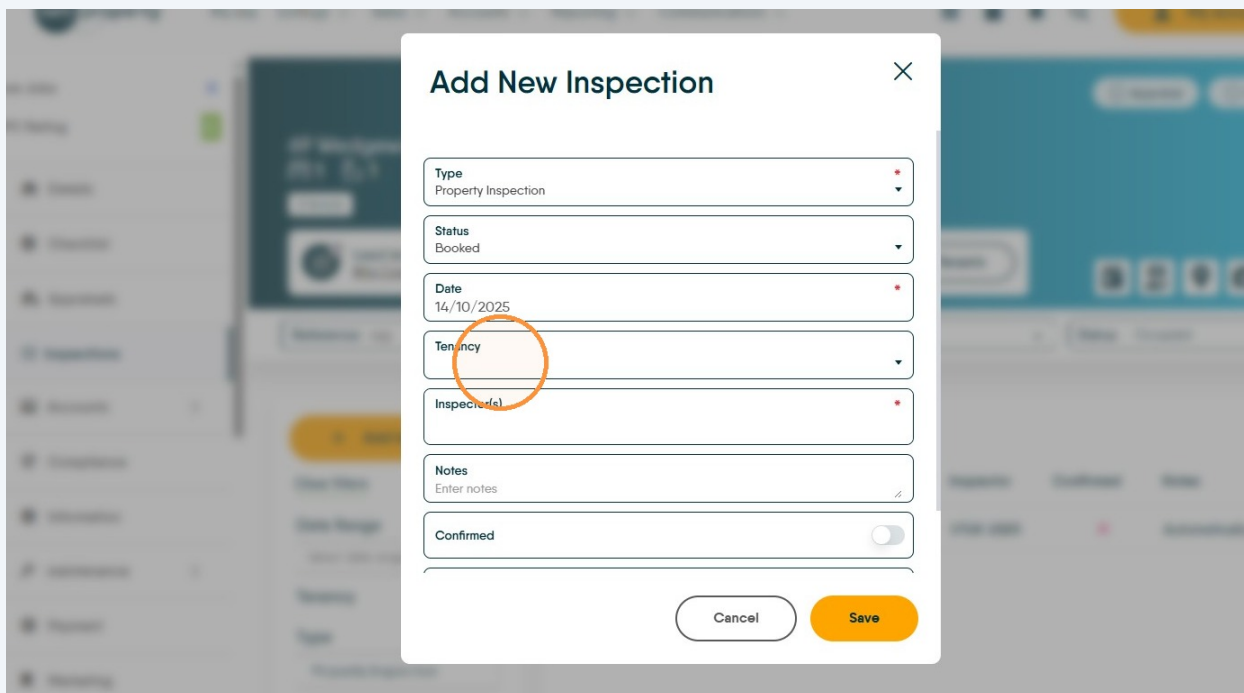
Click into **"Status"** and select the status from the drop down menu. In this case we are using "Booked" you may have different options.



The screenshot shows a modal window titled "Add New Inspection" with a close button (X) in the top right corner. The form contains several fields: "Type" (set to "Property Inspection"), "Status" (with a dropdown menu open), "Date" (set to "14/10/2025"), "Tenancy" (with a dropdown menu open), "Inspector(s)" (with a dropdown menu open), "Notes" (with a text input field), and "Confirmed" (with a toggle switch). The "Status" dropdown menu is open, showing a list of options: "Pending", "Assigned", "Confirmed", "Booked", "Active", and "Complete". The "Booked" option is highlighted with an orange circle. At the bottom of the form, there are "Cancel" and "Save" buttons.

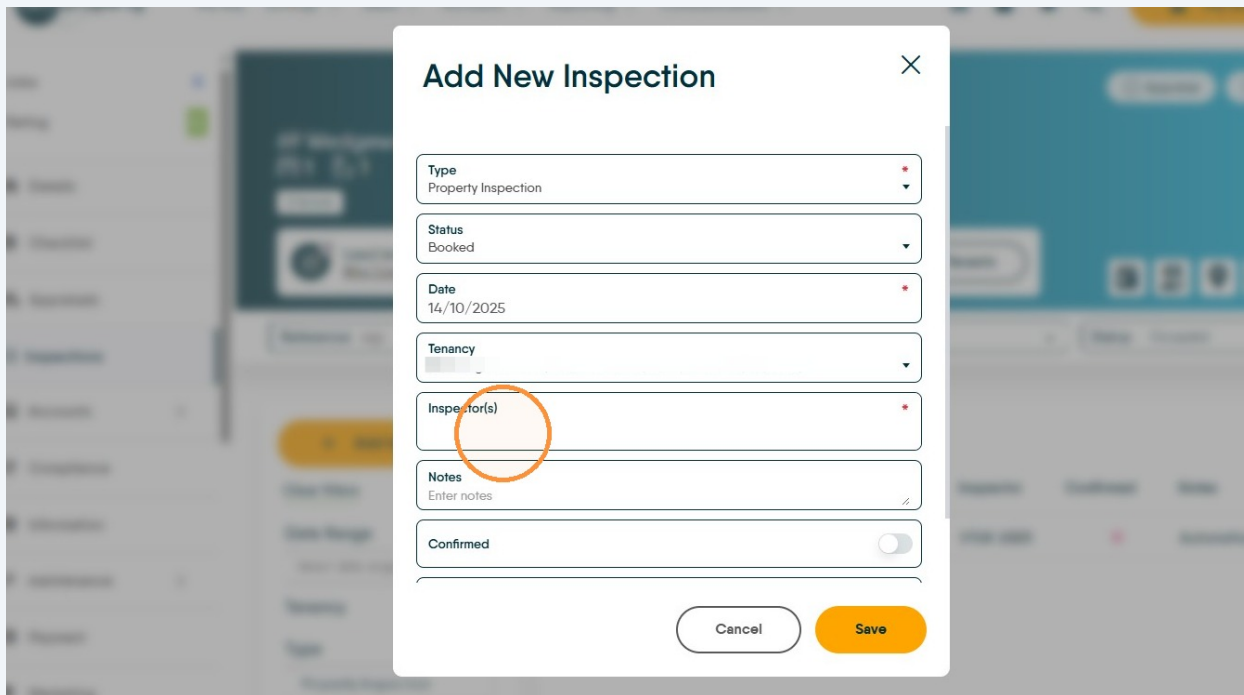
11

Click **"Tenancy"** and select the tenancy details from the drop down menu.



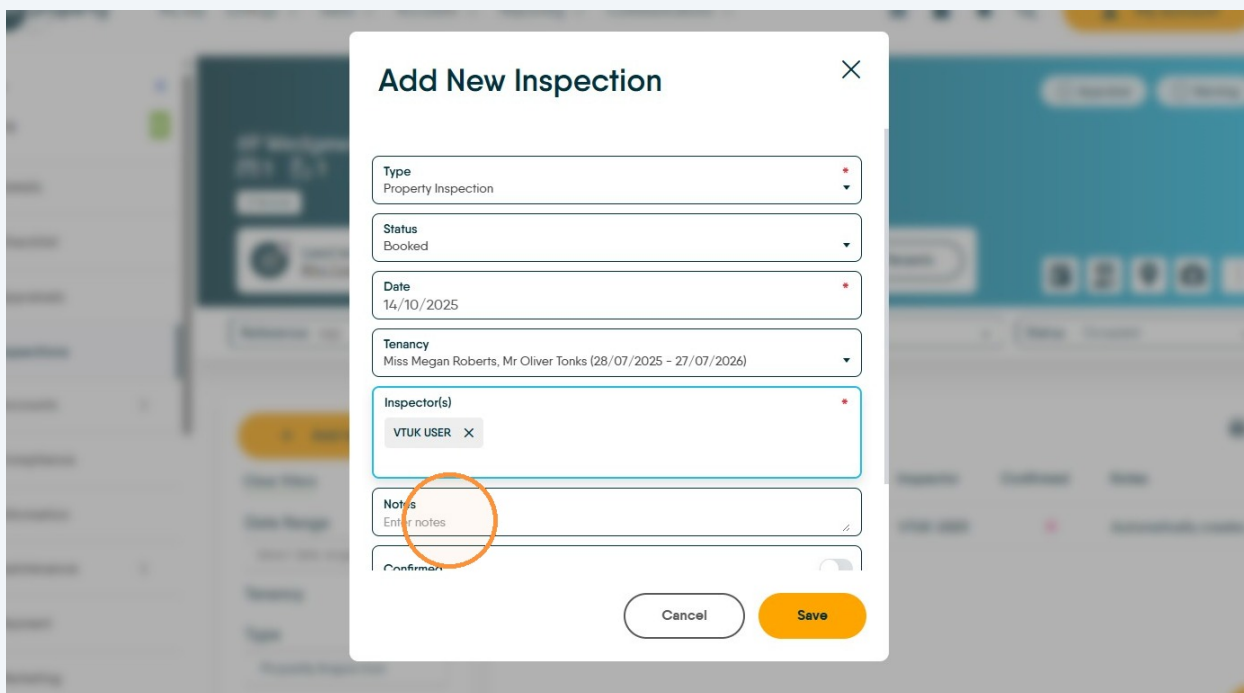
The screenshot shows the same "Add New Inspection" modal window. In this step, the "Tenancy" dropdown menu is open, and the "Tenancy" field is highlighted with an orange circle. The "Status" field is now set to "Booked". The "Date" field remains "14/10/2025". The "Inspector(s)" field is still open. The "Notes" field and "Confirmed" toggle are also visible. The "Cancel" and "Save" buttons are at the bottom.

- 12 Click **"Inspectors"** and select the name for the Inspector from the drop down list.



The screenshot shows a modal window titled "Add New Inspection" with a close button (X) in the top right corner. The form contains several fields: "Type" (Property Inspection), "Status" (Booked), "Date" (14/10/2025), "Tenancy" (empty), "Inspector(s)" (empty), "Notes" (Enter notes), and "Confirmed" (toggle switch). The "Inspector(s)" field is highlighted with an orange circle. At the bottom, there are "Cancel" and "Save" buttons.

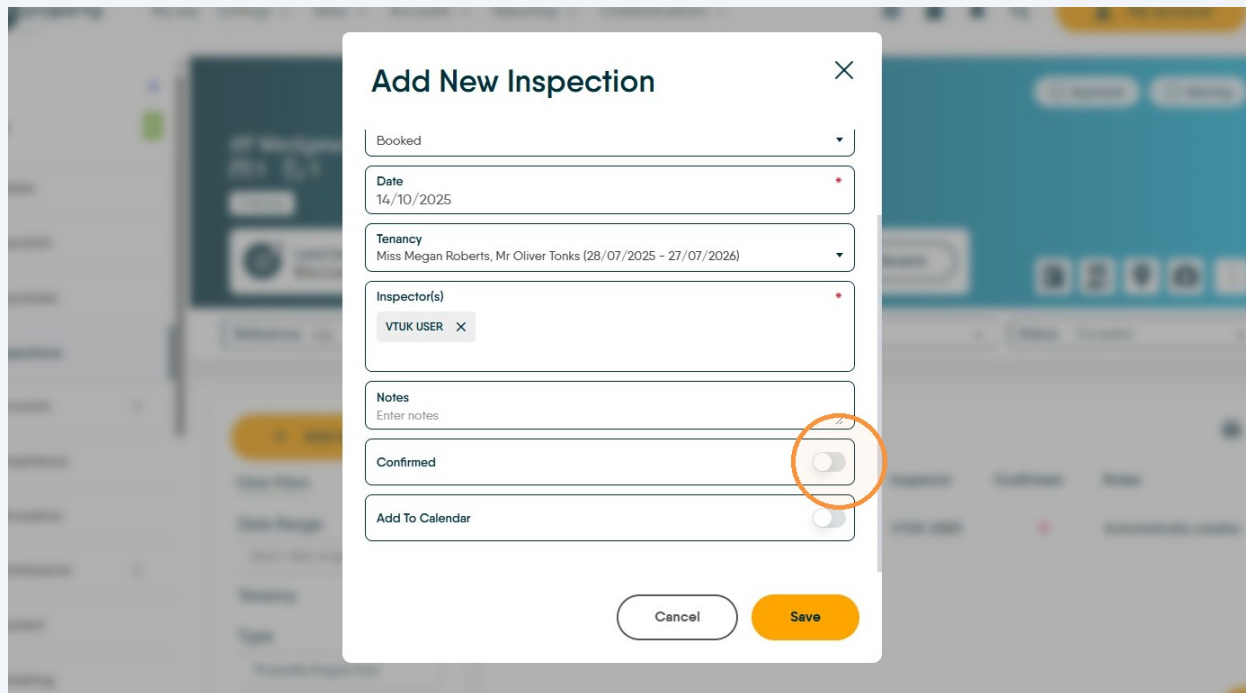
- 13 Click the **"Notes"** field. Add any notes that relate to the inspection.



The screenshot shows the same "Add New Inspection" modal window. In this step, the "Inspector(s)" field is populated with "VTUK USER" and has a close button (X) next to it. The "Notes" field is highlighted with an orange circle. The "Confirmed" toggle switch is now turned on. The "Cancel" and "Save" buttons remain at the bottom.

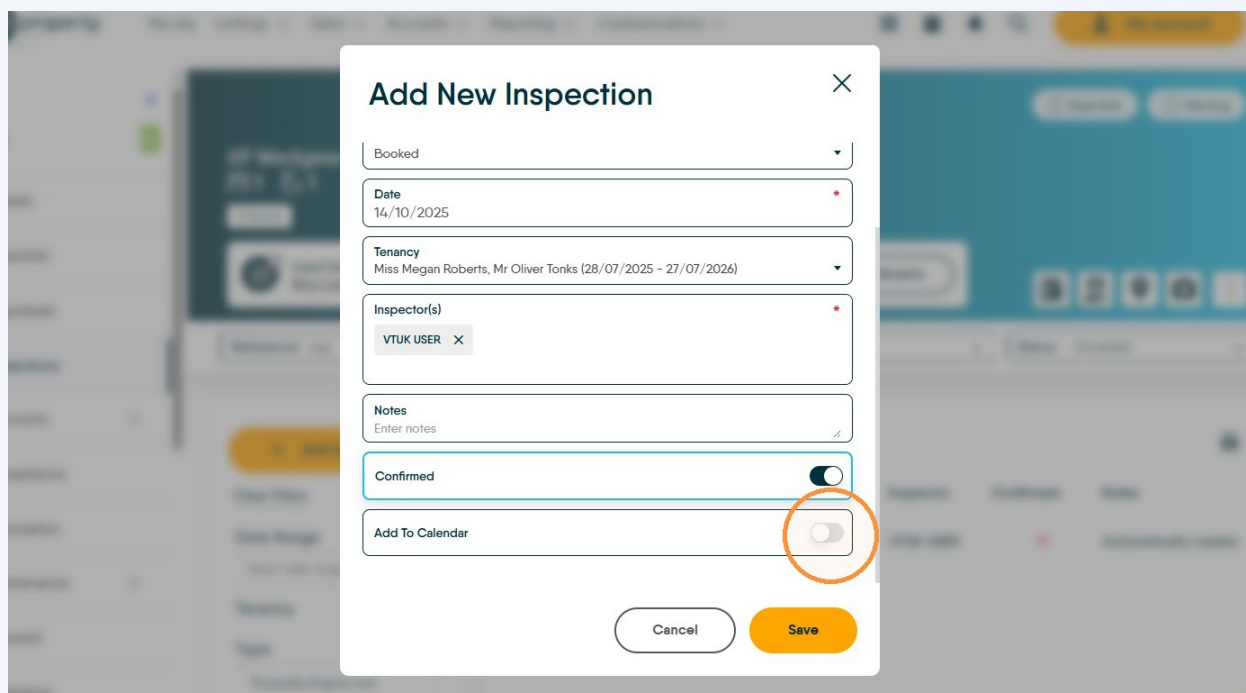
- 14 Click here to show the appointment as **"Confirmed"**.

N.B. if you have an automation to send out Inspection notifications, these will usually only action AFTER the 'confirmed' option has been toggled on.



The screenshot shows the 'Add New Inspection' form. The 'Confirmed' toggle switch is highlighted with an orange circle. The form includes fields for 'Booked', 'Date' (14/10/2025), 'Tenancy' (Miss Megan Roberts, Mr Oliver Tonks (28/07/2025 - 27/07/2026)), 'Inspector(s)' (VTUK USER), 'Notes' (Enter notes), and 'Add To Calendar'. The 'Save' button is orange and the 'Cancel' button is white.

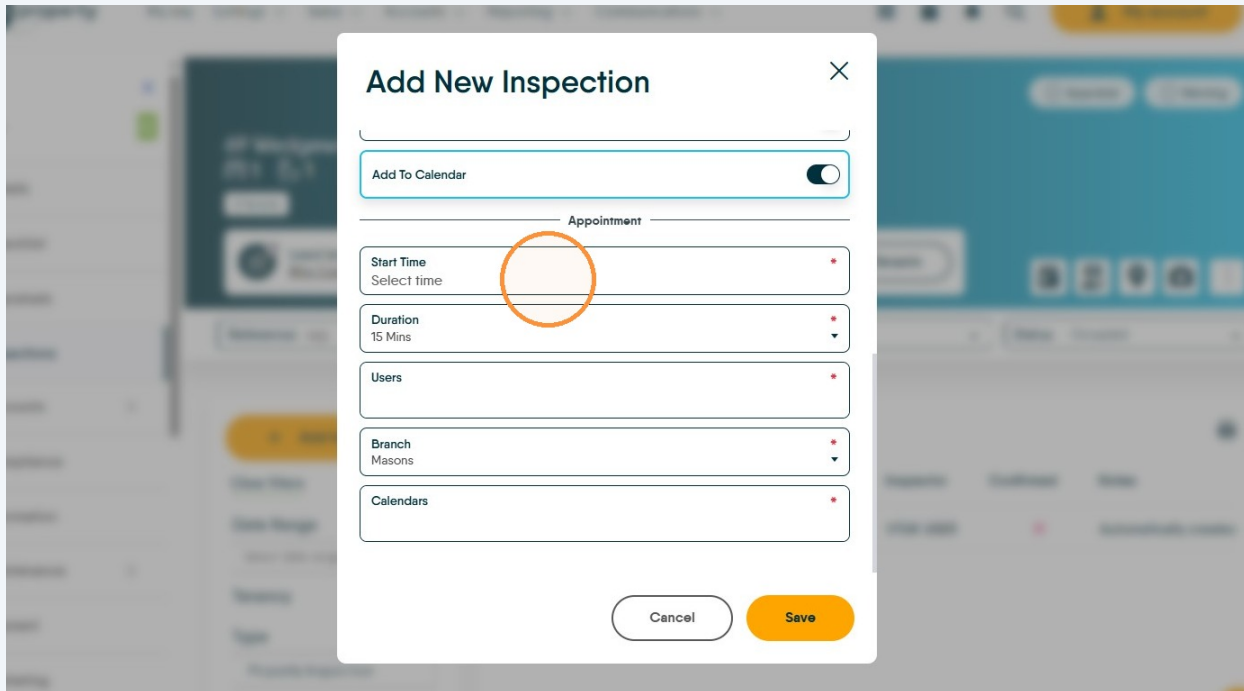
- 15 Click here to add the appointment to the CRM Calendar. If adding to the calendar there will be additional information to add.



The screenshot shows the 'Add New Inspection' form. The 'Add To Calendar' toggle switch is highlighted with an orange circle. The 'Confirmed' toggle switch is also visible and is turned on. The form includes fields for 'Booked', 'Date' (14/10/2025), 'Tenancy' (Miss Megan Roberts, Mr Oliver Tonks (28/07/2025 - 27/07/2026)), 'Inspector(s)' (VTUK USER), 'Notes' (Enter notes), and 'Add To Calendar'. The 'Save' button is orange and the 'Cancel' button is white.

16 Adding appointment to the CRM Calendar

17 Click the "**Start Time**" field and select the start time.



The screenshot shows a modal window titled "Add New Inspection" with a close button (X) in the top right corner. At the top, there is a toggle switch labeled "Add To Calendar" which is currently turned on. Below this is a section header "Appointment". The form contains several input fields: "Start Time" with the placeholder text "Select time", "Duration" with "15 Mins" and a dropdown arrow, "Users", "Branch" with "Masons" and a dropdown arrow, and "Calendars". The "Start Time" field is highlighted with an orange circle. At the bottom of the modal are two buttons: "Cancel" and "Save".

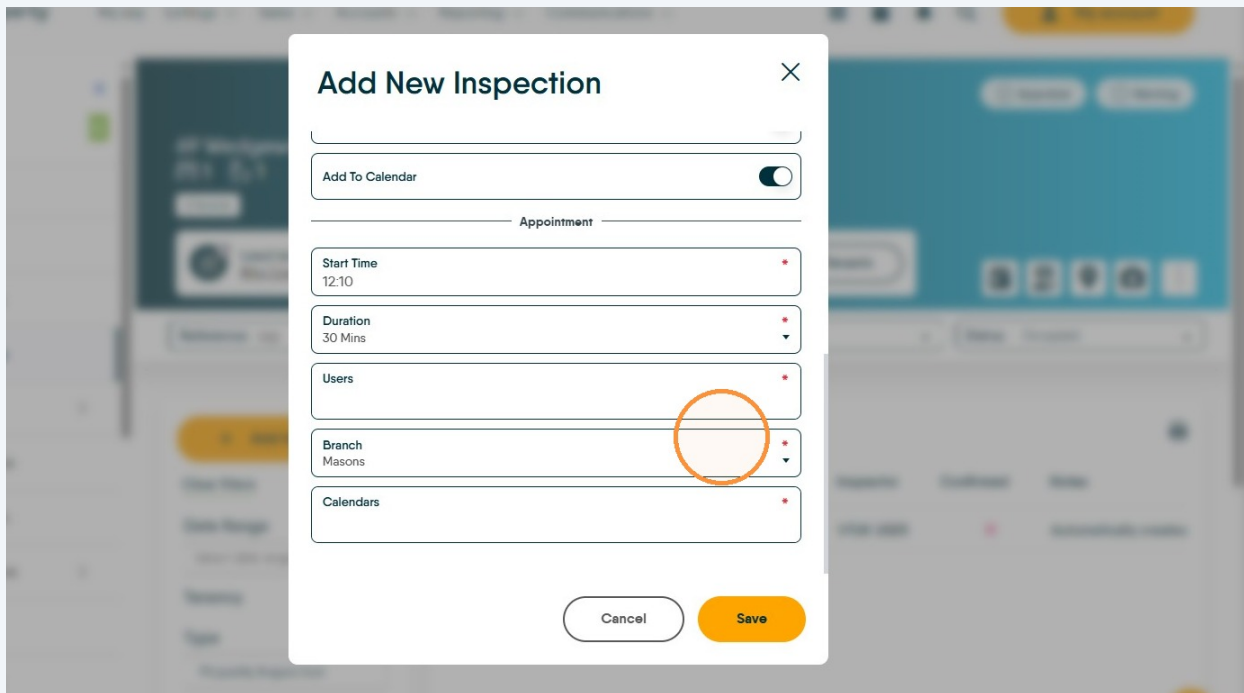
- 18 Set the time either using the arrows or over type the time on screen.

The screenshot shows the 'Add New Inspection' form. At the top, there is a toggle for 'Add To Calendar'. Below it, a section titled 'Appointment' contains a 'Start Time' field with the value '12:10'. To the right of the time field is a circular clock interface with an orange circle highlighting the '10' in the minutes section. Below the time field are three dropdown menus: 'Users', 'Branch' (set to 'Masons'), and 'Calendars'. At the bottom are 'Cancel' and 'Save' buttons.

- 19 Click "**Duration**" and set the duration of the visit from the drop down menu

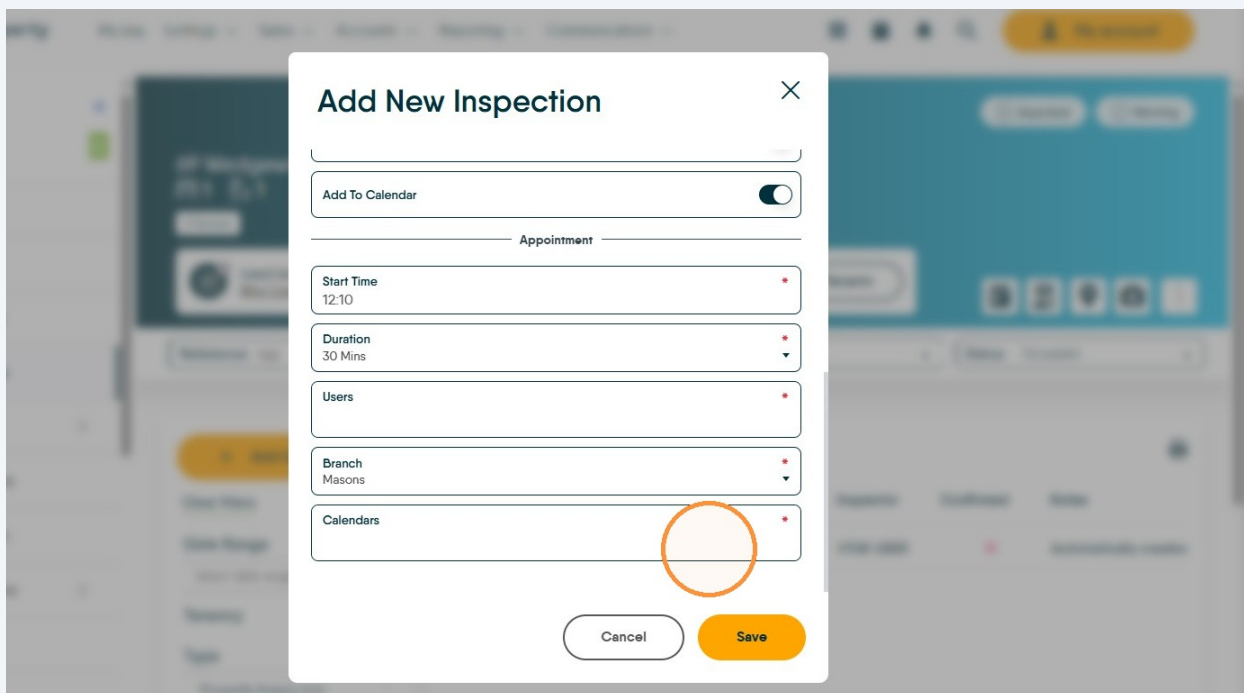
The screenshot shows the 'Add New Inspection' form with the 'Duration' dropdown menu open. The 'Duration' field now shows '15 Mins'. The dropdown menu lists several options: '15 Mins', '30 Mins', '45 Mins', '1 Hour', '1 Hour 15 Mins', and '1 Hour 30 Mins'. An orange circle highlights the '30 Mins' option. The 'Cancel' and 'Save' buttons are at the bottom.

- 20 Click "**Branch**" to set the branch you are allocating the Inspection to.



The screenshot shows a modal window titled "Add New Inspection" with a close button (X) in the top right corner. The form contains several fields: "Add To Calendar" with a toggle switch, a section header "Appointment", "Start Time" (12:10), "Duration" (30 Mins), "Users", "Branch" (Masons), and "Calendars". The "Branch" field is highlighted with an orange circle. At the bottom are "Cancel" and "Save" buttons.

- 21 Click this search field.



This screenshot is identical to the one above, showing the "Add New Inspection" modal form. In this instance, the "Calendars" field at the bottom of the form is highlighted with an orange circle, indicating the search field mentioned in the instruction.

22

Click the calendar you are adding the appointment to, usually this would be the Lettings calendar.

The screenshot shows a modal window titled "Add New Inspection" with a close button (X) in the top right corner. The form contains several fields: "Add To Calendar" with a toggle switch, "Appointment" section with "Start Time" (12:10), "Duration" (30 Mins), "Users", "Branch" (Masons), and "Calendars". The "Calendars" field is expanded, showing a list with "Sales" and "Lettings". The "Lettings" option is highlighted with an orange circle.

23

Click **"Save"**

This screenshot shows the same "Add New Inspection" modal form. In this step, the "Calendars" section is already populated with "Lettings" (indicated by a small 'X' next to the text). At the bottom of the modal, there are two buttons: "Cancel" and "Save". The "Save" button is highlighted with an orange circle.

To Update the Next Visit Due Date in the Tenancy Record

24 Scroll down the left side menu and select the "Tenancies" tab

Live Jobs 0

EPC Rating C

Details

Checklist

Appraisals

Inspections

Accounts

Compliance

Information

Maintenance

Payment

Marketing

Key Control

69 Wedgewood Road, Hitchin, SG4 0HB |
1 1 | £ 995.00 pcm

2 Tenants

Lead landlord: Mrs. Connie Fiddm... View Landlords

Lead tenant: Miss Megan Rob... View Tenants

Reference: P83 Negotiator: VTUK USER Branch: Masons Status: Occupied

+ Add Inspection

Search

Clear filters

Date Range
Select date range

Tenancy

Type
Property Inspection

Inspector
VTUK USER

Date	Type	Status	Inspector	Confirmed	Notes
28/10/2025	Property Inspection	Pending	VTUK USER	✗	Automati

25 Click "Tenancies"

Marketing

Key Control

Media

Rooms

Portals

Viewings

Offers

Enquiries

Tenancies

Contacts

Documents

Journal

Audit

69 Wedgewood Road, Hitchin, SG4 0HB |
1 1 | £ 995.00 pcm

2 Tenants

Lead landlord: Mrs. Connie Fiddm... View Landlords

Lead tenant: Miss Megan Rob... View Tenants

Reference: P83 Negotiator: VTUK USER Branch: Masons Status: Occupied

+ Add Inspection

Search

Clear filters

Date Range
Select date range

Tenancy

Type
Property Inspection

Inspector
VTUK USER

Date	Type	Status	Inspector	Confirmed	Notes
28/10/2025	Property Inspection	Pending	VTUK USER	✗	Automati

26 Click "View Tenancy"

Marketing

Key Control

Media

Rooms

Portals

Viewings

Offers

Enquiries

Tenancies

Contacts

Documents

Journal

Audit

Reference: P83

Negotiator: VTUK USER

Branch: Masons

Status: Occupied

+ Add New

Sort Tenancies

Search

Clear filters

Live

Pre Booked

Archived

Live

MR

Megan Roberts

megan.roberts2904@outlook.c...

28/07/2025 - 27/07/2026

View Tenancy

Archived

KR

Kayleigh Ross

kayleigh.ross1997@gmail.com

07899 845705

28/06/2022 - 22/08/2025

View Tenancy

27 Click the "Visit Next Due" option

£ 995.00

£ 1148.00

Live

MR

Megan Roberts

megan.roberts2904@outlook.com

07432 615907

Warning

69 Wedgewood Road, Hitchin

Reference

Negotiator: VTUK USER

Branch: Masons

Status

Tenancy Dates

Tenancy Start

28/07/2025

Tenancy End

27/07/2026

Renewal Start

14/10/2025

Vacating Date

14/10/2025

Visit Next Due

28/10/2025 00:00

Tenancy Details

Lease Period

12 Month Shorthold

Relocation Agent

Agreement Name

Miss Megan Roberts, Mr Oliver Tonks

General Information

With Effect Break

Notice Date

Break Clause

B I U

28

Click date the next visit is due and 'Save' the screen. This will update the Activity List.

£ 995.00
£ 1148.00
Live

MR Megan Roberts
megan.roberts2904@outlook.com
07432 615907

69 Wedgewood Road, Hitchin

Reference Negotiator VTUK USER Branch Masons

Tenancy Dates

Tenancy Start 28/07/2025	Tenancy End 27/07/2026	Renewal Start 14/10/2025	Vacating Date 14/10/2025
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Tenancy Details

Lease Period: 12 Month Shorthold
Relocation Agent
Agreement Name: Miss Megan Roberts, Mr Oliver Tonks

General Information

With Effect Break
Notice Date
Break Clause: B I U

28 October 2025
October 2025
28/10/2025 00:00

Save