

Adding A Property Appraisal In iamproperty CRM



This guide offers a step-by-step walkthrough for adding a property appraisal in the iamproperty CRM, making it an essential resource for real estate professionals looking to streamline their appraisal process.

By following the detailed instructions, users can efficiently manage property appraisals, ensuring accurate data entry and effective communication with clients. It simplifies the workflow within the CRM, ultimately enhancing productivity and organisation in property management.



ALERT! Why Should You Create an Appraisal Appointment and add a Property?

Whilst it may seem like an unnecessary step, adding the property before conducting an appraisal/valuation visit helps build a sales pipeline for your business and gives you valuable data. For example an appraisal record in CRM allows you to track if you won the business and if you lose it, track who you lost it to. This can lead to being able to see a trend, which you can investigate and build a strategy to combat.

If you are looking to gain a new Landlord, by adding their details and that of the property you can instantly match the property against the Applicants you have on your lists and when you meet with the landlord, show them the potential clients you have for their property. Giving you a strong proposal to be chosen.

When you win the business, you can take the images from your mobile handset and upload them straight to CRM, match to your Applicants and send them the details straight away, without leaving the property.

1

Navigate to <https://crm.iamproperty.com/MyDay>



Tip! This process is the same for Sales and Lettings properties and can be started from within a property record rather than searching from the My Day screen.

You can also start from the search function, or from a newly created property record.

2

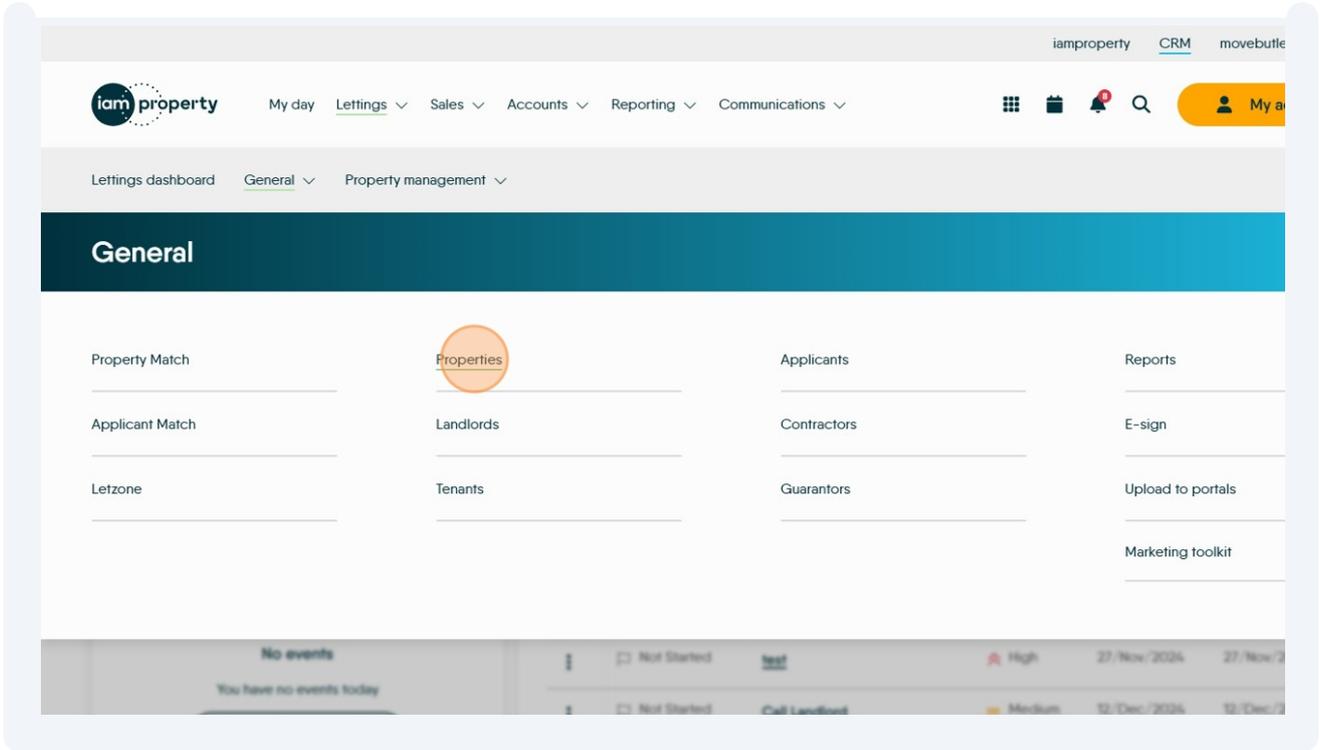
To find a property from the the list of Properties you have on CRM. Click "Lettings", then click "General", then click "Properties" this will take you to a list of your properties

The screenshot shows the CRM dashboard with the 'Lettings' menu item highlighted in the top navigation bar. The dashboard includes a search bar, a 'Today's events' section with 'No events' displayed, and a 'My tasks' table with three entries.

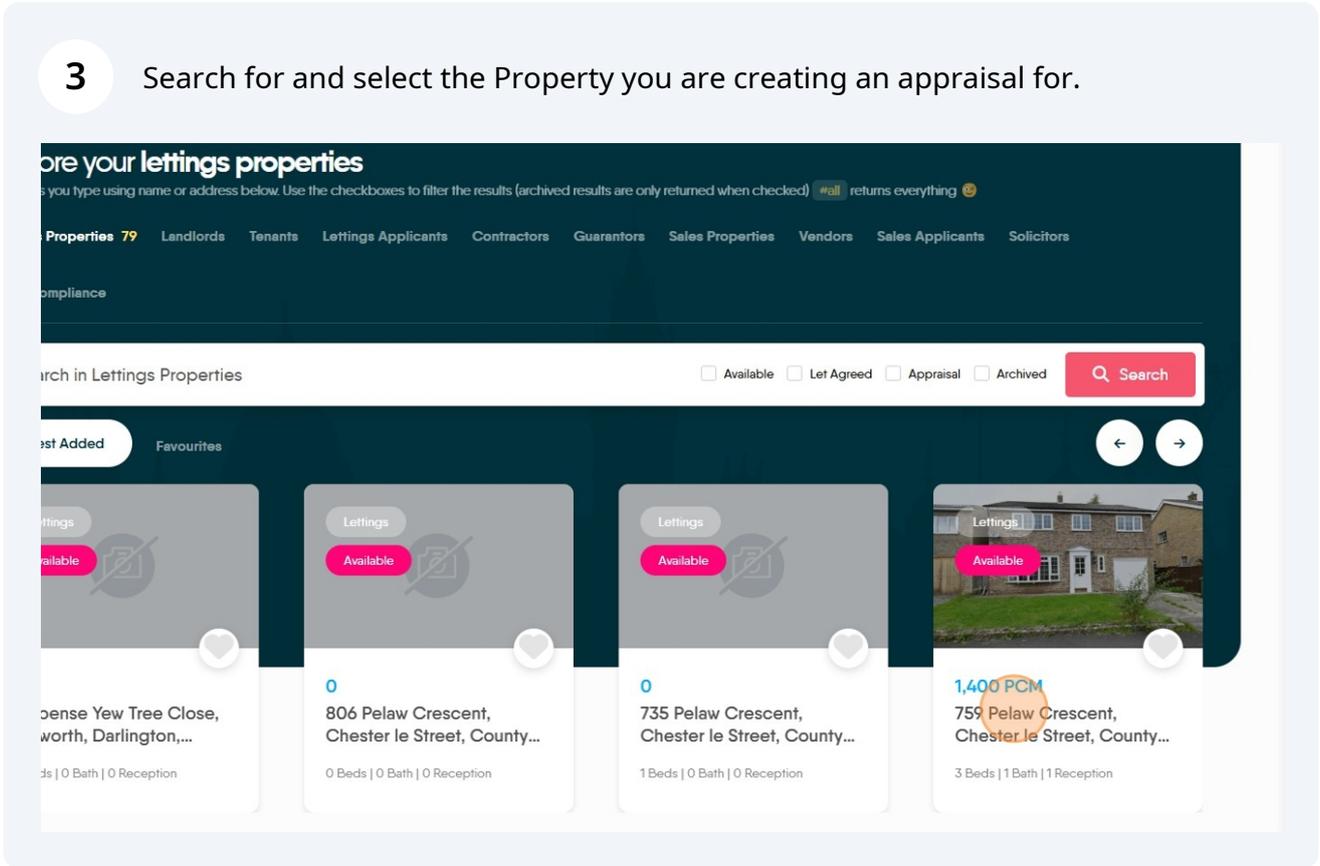
Status	Name	Priority	Start date	Due date
Not Started	<u>Call Landlord</u>	High	15/Nov/2024	15/Nov/2
Not Started	<u>test</u>	High	27/Nov/2024	27/Nov/2
Not Started	<u>Call Landlord</u>	Medium	12/Dec/2024	12/Dec/2

The screenshot shows the CRM dashboard with the 'General' menu item highlighted in the top navigation bar. The dashboard includes a search bar, a 'Today's events' section with 'No events' displayed, and a 'My tasks' table with three entries.

Status	Name	Priority	Start date	Due date
Not Started	<u>Call Landlord</u>	High	15/Nov/2024	15/Nov/2
Not Started	<u>test</u>	High	27/Nov/2024	27/Nov/2
Not Started	<u>Call Landlord</u>	Medium	12/Dec/2024	12/Dec/2



3 Search for and select the Property you are creating an appraisal for.



i Tip! If you are already in a property record, start from here.

4 Click "Appraisals"

The screenshot shows the iam property dashboard. The left sidebar contains a menu with the following items: Live Jobs (0), EPC Rating (B), Details, Checklist, Appraisals (highlighted with an orange circle), Inspections, Accounts, Compliance, Information, maintenance, and Payment. The main content area features a large image of a brick house with a white door and a garage. Below the image are several smaller thumbnail images showing different rooms. To the right of the image is a 'Property Information' section with the following details: Postcode: DH2 2HX; Fully managed (checked): This property is fully managed by us; Rent collect: We collect rent for this property; Let only: We only let property; Management Fee: £ 0; Upfront Letting Fee: £ 0; Regular Letting Fee: £ 0; Authorised Expense Amount: £ 0.00; Estimated Rental Value: £ 0.00; Agreement Name: Mr letting landlord34. Below the image, there is a 'COMMERCIAL' section with a 'Commercial Unit' toggle switch and three options: Exempt (checked), Inclusive, and Exclusive, each with a 'Rent amount is' label.

5 Click "Add Appraisal"

The screenshot shows the iam property dashboard for a specific property. The left sidebar is the same as in the previous screenshot. The main content area has a dark blue header with the following information: 759 Pelaw Crescent, Chester le Street, DH2 2HX | 3 beds | 1 bath | £ 1400.00 pcm. Below the header, there is an 'Available' status and two buttons: 'Lead landlord: Mr letting landlord34 View Landlords' and 'No tenants View Tenants'. Below this, there are four input fields: Reference:, Negotiator: Training Dave, Branch: Morgan & Co, and status: Prospect. In the center of the page, there is a large yellow button with a plus sign and the text '+ Add Appraisal', which is highlighted with an orange circle. Below this button, there is a message: 'No appraisals available Please click the button to add' and a button labeled 'Add New'.

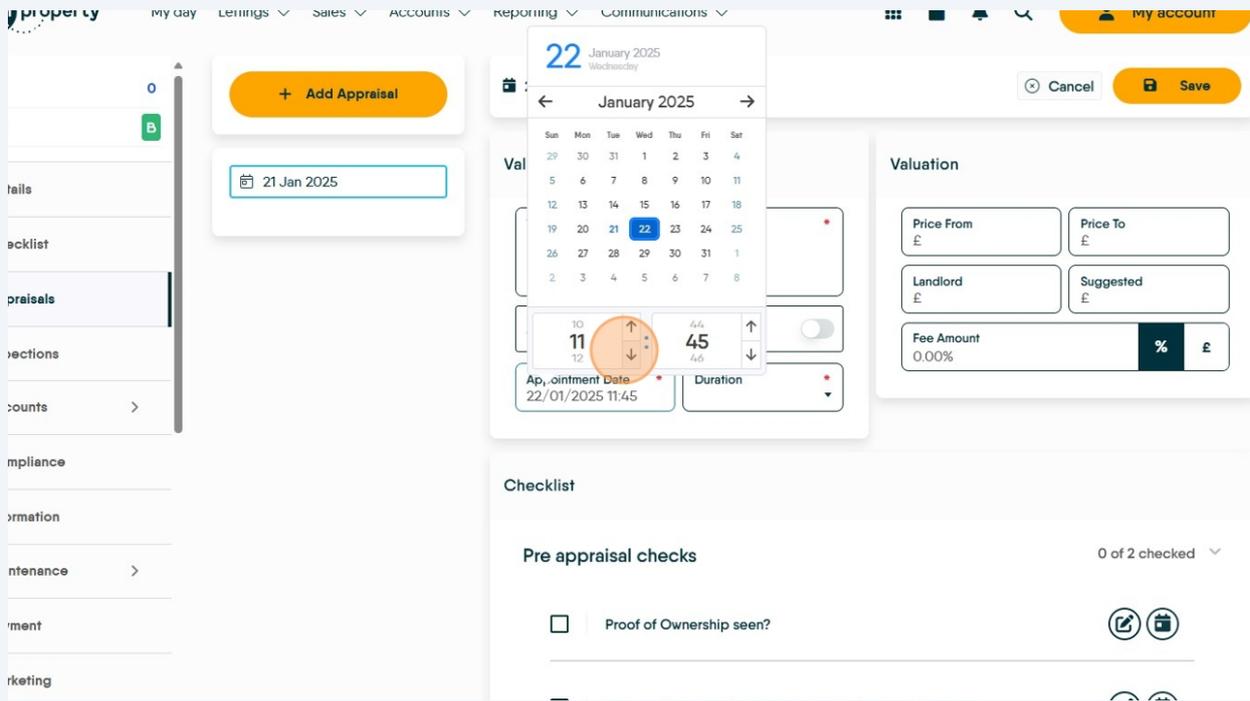
6

Click Valuers to select the Valuer/s for the property. Then click into the appointment date field to set the appointment date.

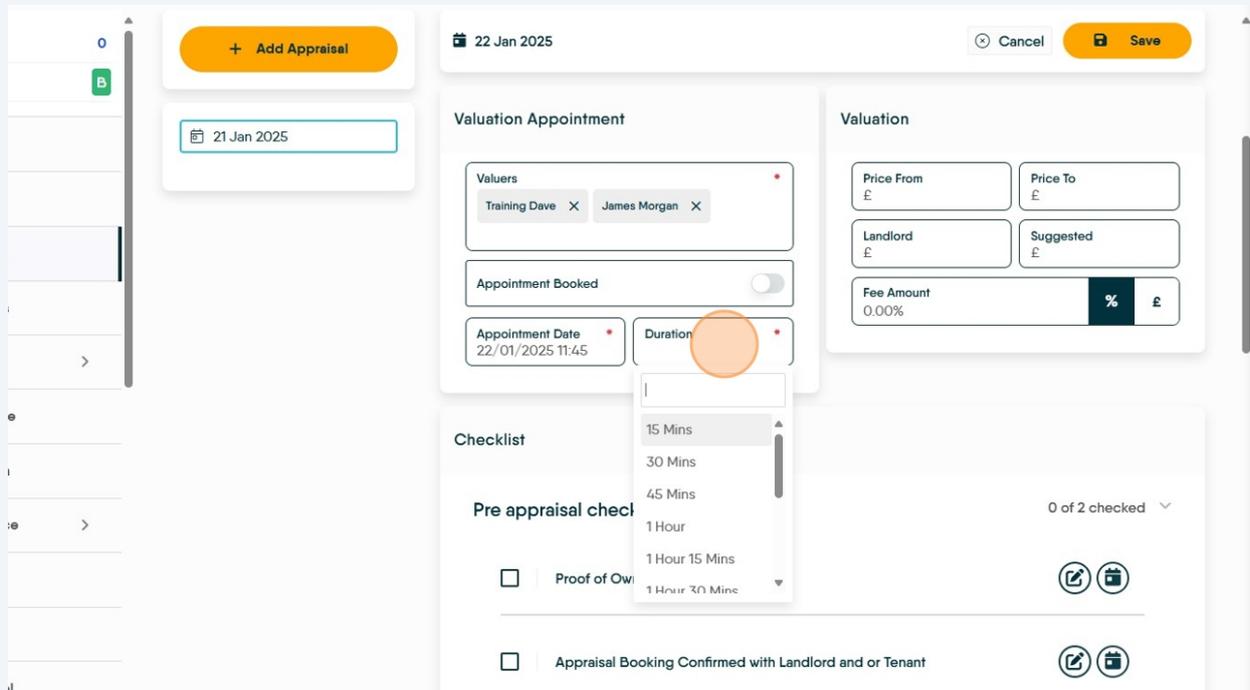
The screenshot shows the 'Add Appraisal' form in a web application. At the top right, there are navigation links for 'iamproperty', 'CRM', 'movebutler', and 'iamsold'. Below these are icons for a grid, calendar, notifications, and search, along with a 'My account' button. The main header includes the 'property' logo and a navigation menu with 'My day', 'Lettings', 'Sales', 'Accounts', 'Reporting', and 'Communications'. On the left, a sidebar lists various property management categories. The form itself has a date selector at the top set to '21 Jan 2025' with 'Cancel' and 'Save' buttons. The 'Valuation Appointment' section contains a 'Valuers' field with 'Training Dave' selected, an 'Appointment Booked' toggle, and 'Appointment Date' and 'Duration' dropdowns. The 'Valuation' section includes fields for 'Price From', 'Price To', 'Landlord', 'Suggested', and 'Fee Amount' (0.00%). A 'Checklist' section titled 'Pre appraisal checks' shows '0 of 2 checked'.

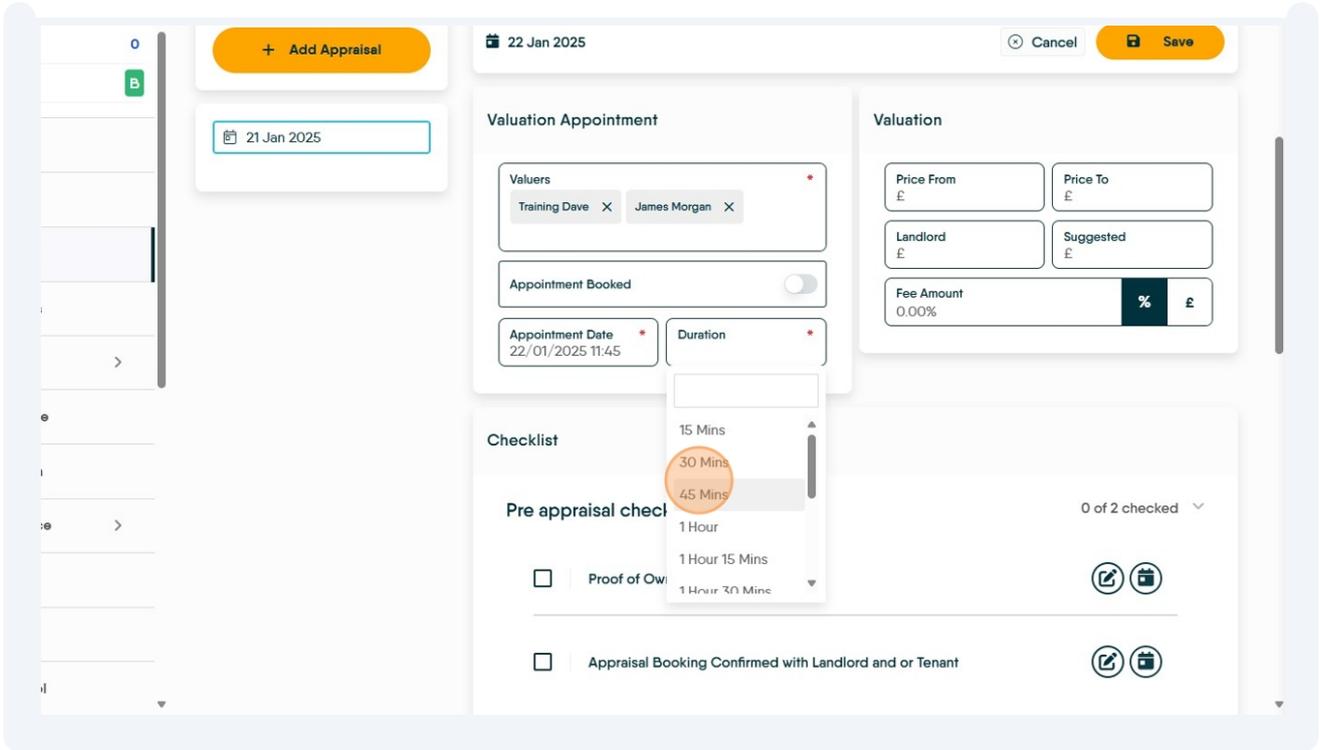
This screenshot shows the same 'Add Appraisal' form, but with 'James Morgan' added to the 'Valuers' field. The 'Appointment Date' field is highlighted with an orange circle, indicating it is the next step in the process. The 'Pre appraisal checks' section now lists two items: 'Proof of Ownership seen?' and 'Appraisal Booking Confirmed with Landlord and or Tenant', both with checkboxes and edit/delete icons.

7 Click here to set the appointment date and time.



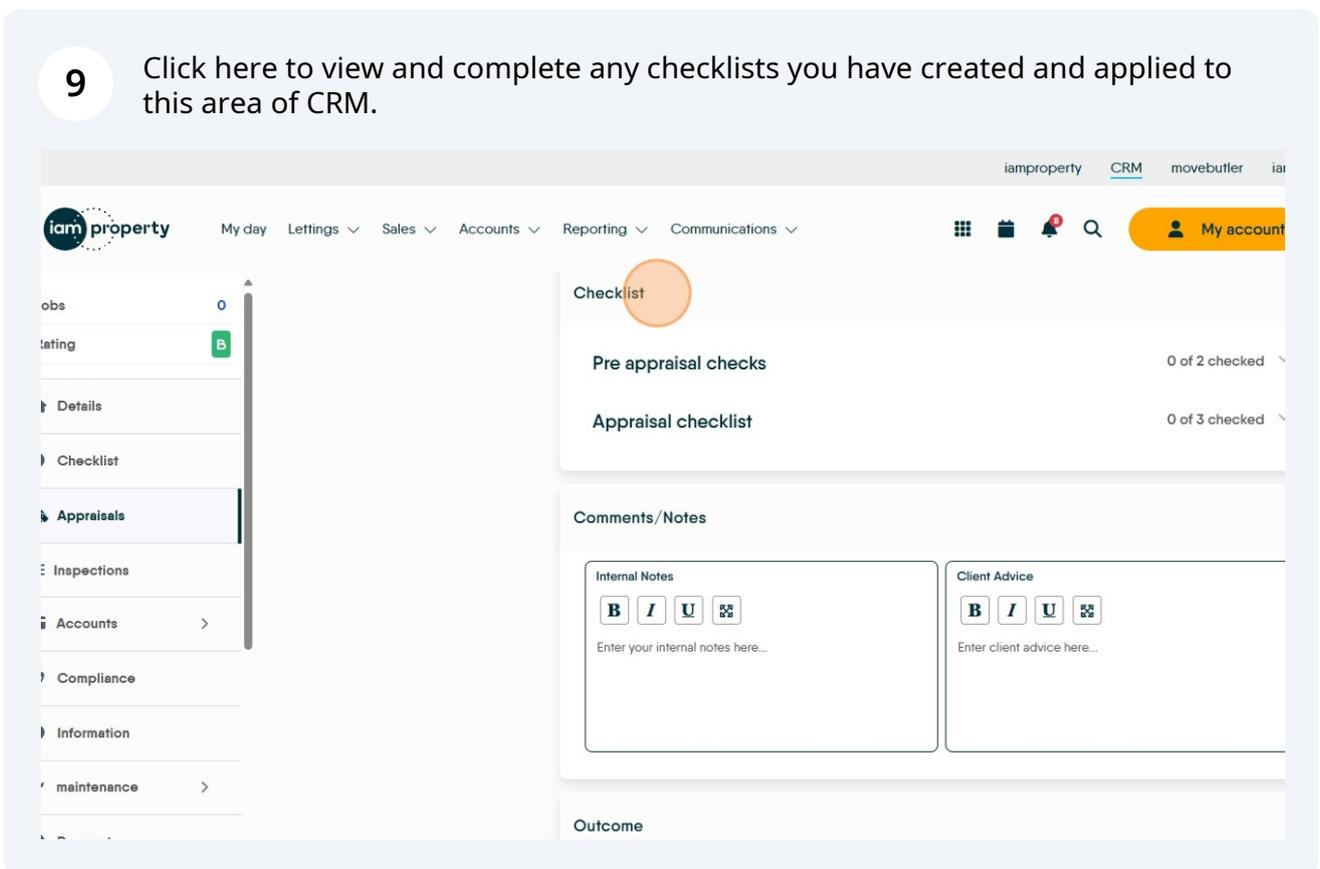
8 Click here to set the duration of the appointment. For example click "45 Mins"





9

Click here to view and complete any checklists you have created and applied to this area of CRM.



10

Click "Enter your internal notes here..." this will be available in the Calendar entry for the appraisal. These are notes added for your information.

Add any advice that you gave to the Landlord (or Vendor) into the Client Advice field.

Live Jobs 0

EPC Rating B

Details

Checklist

Appraisals

Inspections

Accounts >

Compliance

Information

maintenance >

Payment

Marketing

Key Control

Checklist

Pre appraisal checks 0 of 2 checked

Appraisal checklist 0 of 3 checked

Comments/Notes

Internal Notes

Enter your internal notes here...

Client Advice

Enter client advice here...

Outcome

Status

Lost To Agent

Notes

Enter outcome notes here...

11

Click "Save" the appointment will now show in the property record and the Calendar.

iamproperty CRM movebutler iamsold

My day Lettings Sales Accounts Reporting Communications

My account

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

+ Add Appraisal

12 Feb 2025

Cancel Save

Valuation Appointment

Valuers Training Dave

Appointment Booked

Appointment Date Duration

Valuation

Price From Price To

Landlord Suggested

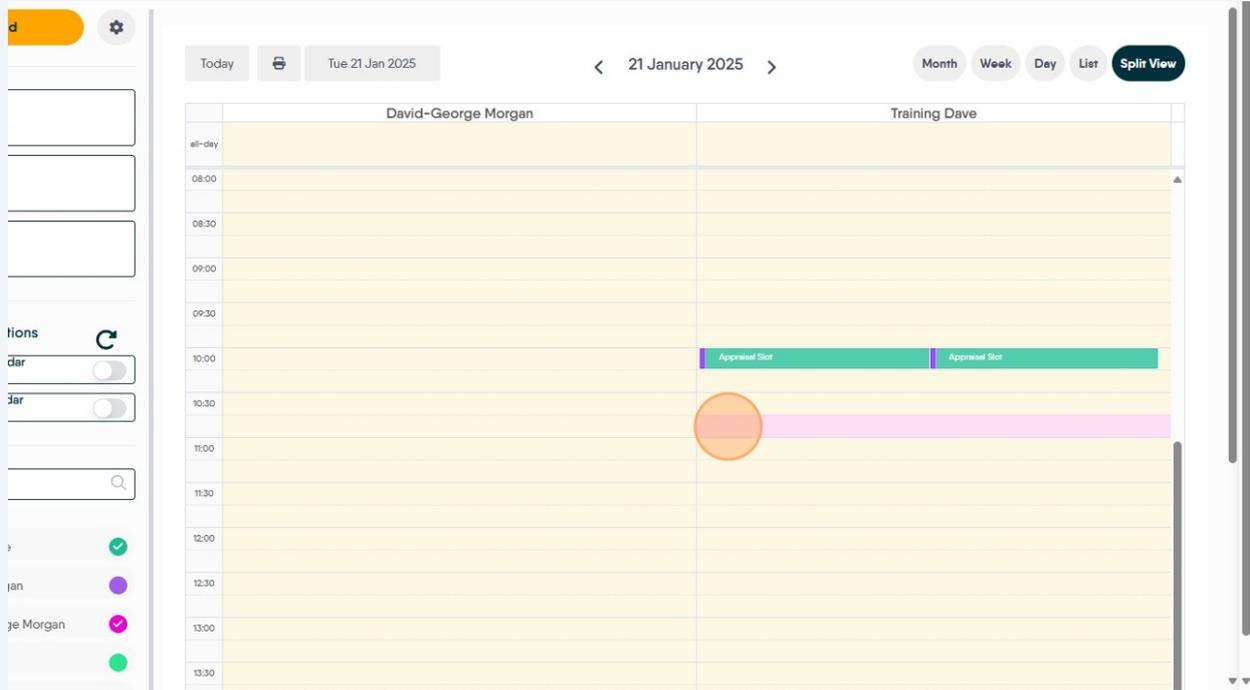
Fee Amount 0.00%

Creating an Appraisal Appointment in the Calendar

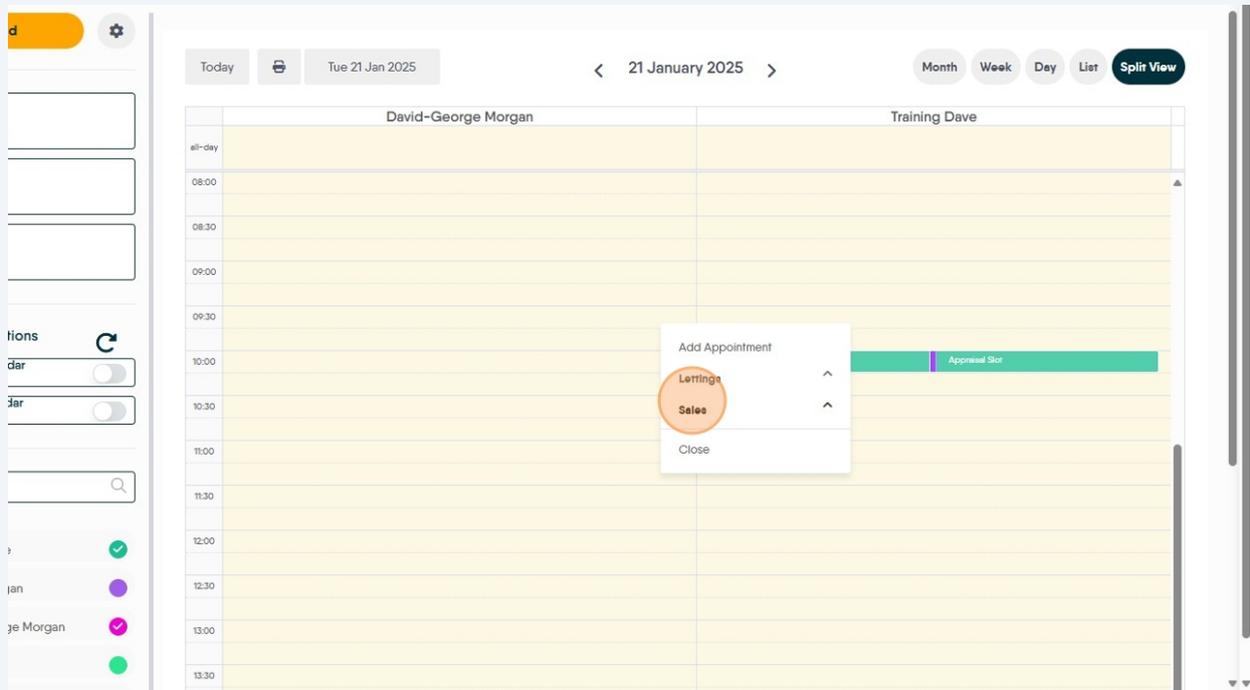
12 Click "Calendar"

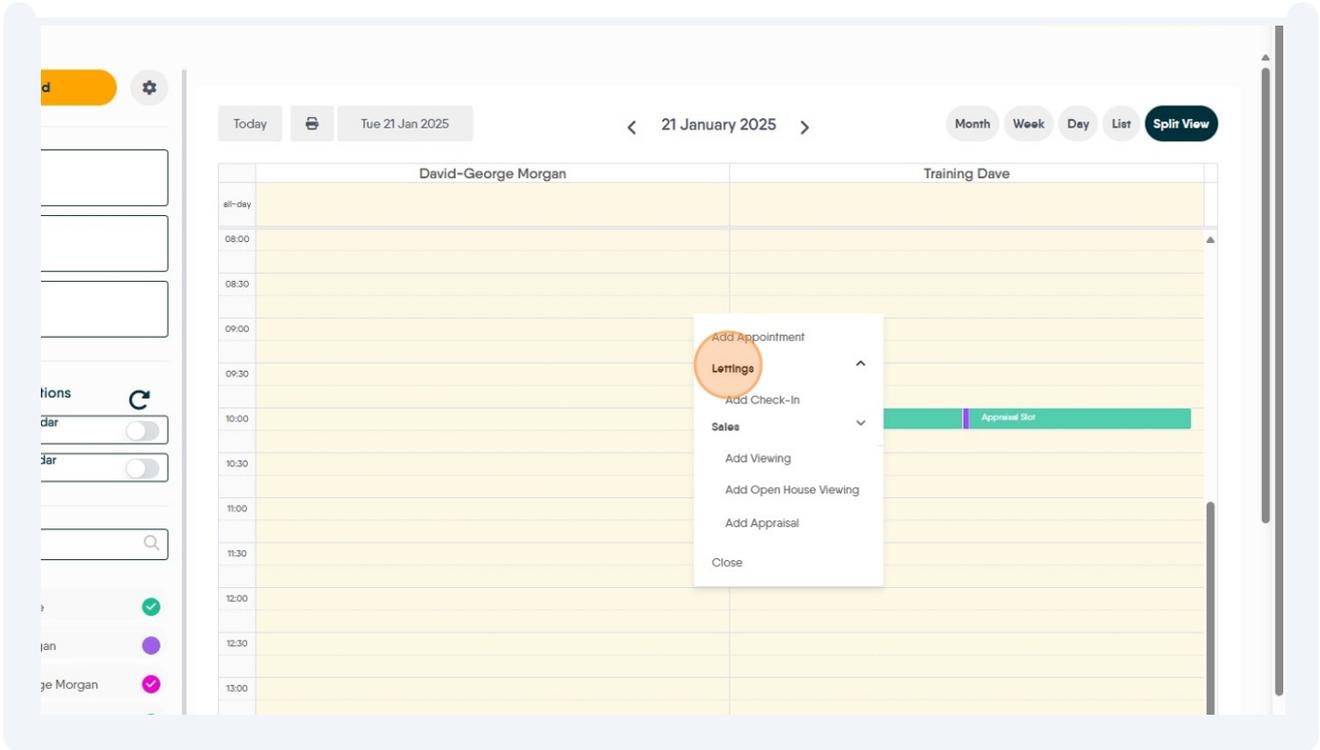
The screenshot shows a software interface for property management. At the top, there are navigation tabs: 'iamproperty', 'CRM', 'movebutler', and 'iamsold'. Below this is a main navigation bar with 'My day', 'Lettings', 'Sales', 'Accounts', 'Reporting', and 'Communications'. A search icon and a 'My account' button are also present. The main content area features a property card for '759 Pelaw Crescent, Chester le Street, DH2 2HX' with '3' bedrooms and '1' bathroom, priced at '£1400.00 pcm'. The property is marked as 'Available'. Below the card are buttons for 'View Landlords' (with 'Lead landlord: Mr Letting Landlord34') and 'View Tenants' (with 'No tenants'). A sidebar on the left shows a calendar view with a date '15 Jan 2025' highlighted. The main area below the property card has a form with fields for 'Reference:', 'Negotiator: Training Dave', 'Branch: Morgan & Co', and 'status: Prospect'. There is a '+ Add Appraisal' button and a calendar icon showing '15 Jan 2025 10:45 - 11:15' with 'Delete' and 'Save' buttons. Below this, there are sections for 'Valuation Appointment' (listing 'Training Dave' and 'James Morgan' as valuers) and 'Valuation' (with 'Price From £1,200' and 'Price To £1,500').

13 Find the date and time you are creating the appraisal for and right-click.



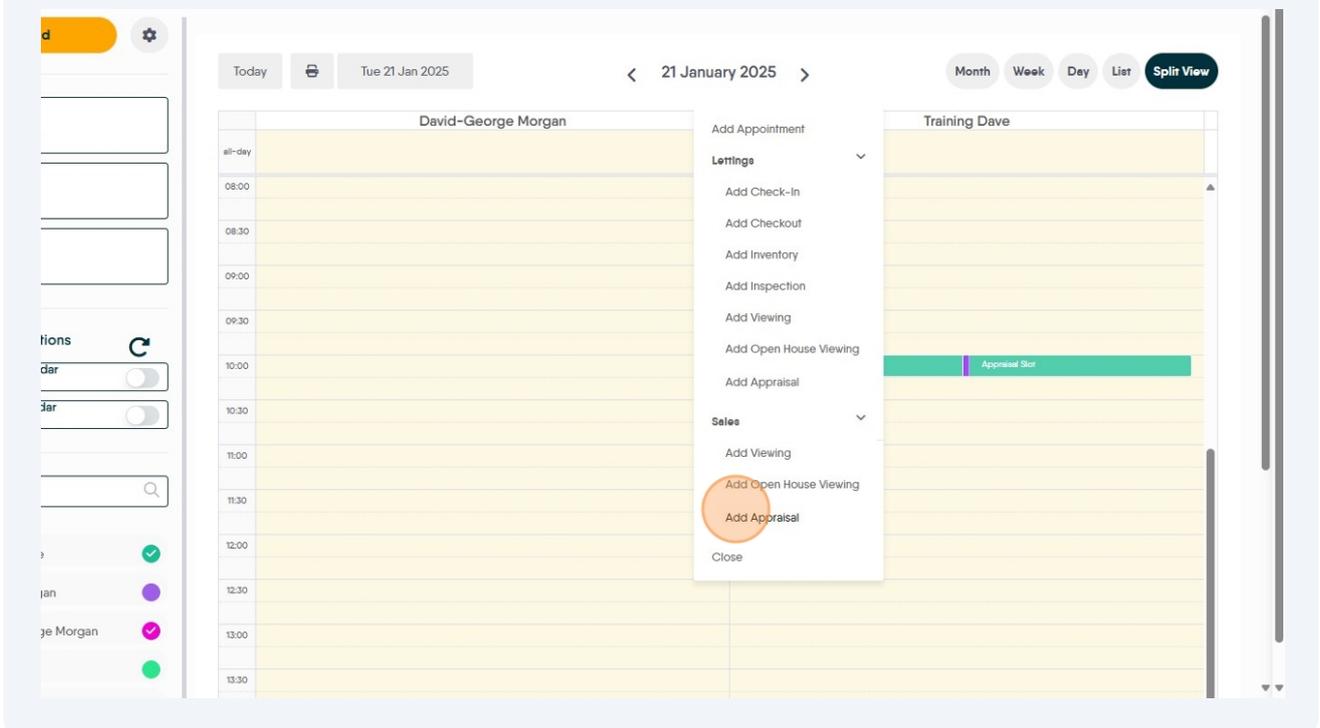
14 Click "Sales" or Click "Lettings"





15

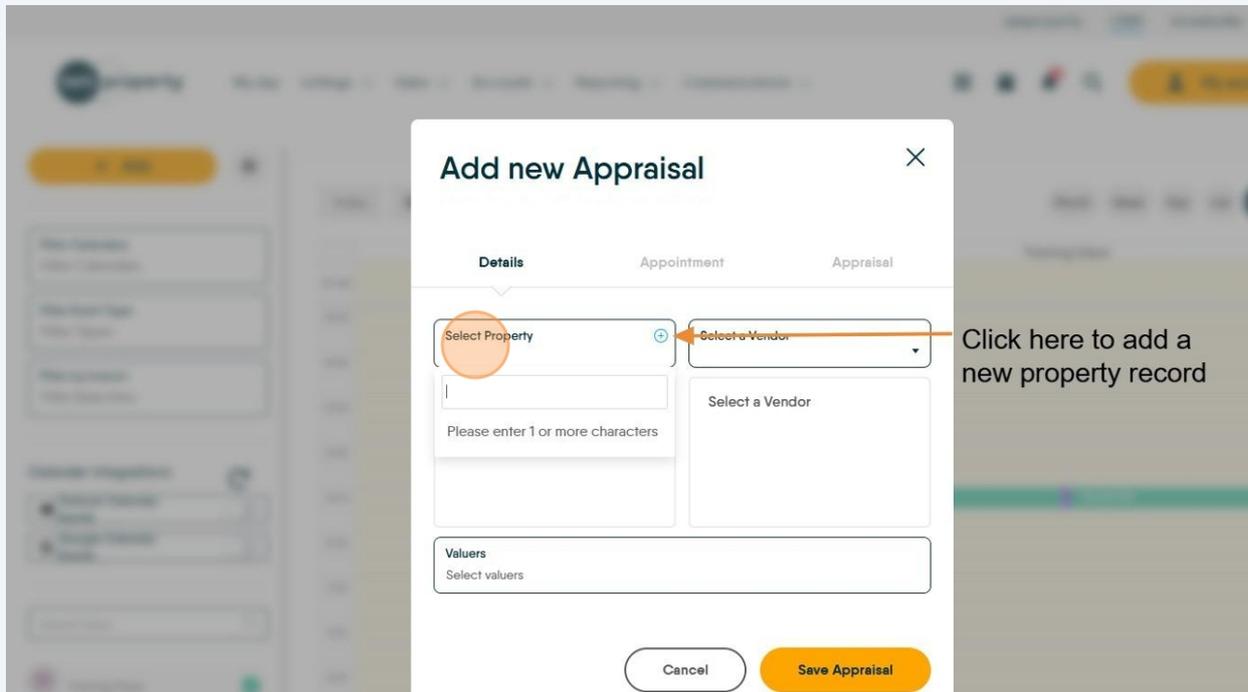
Click "Add Appraisal", as previously the process is the the same for Sales and Lettings



16

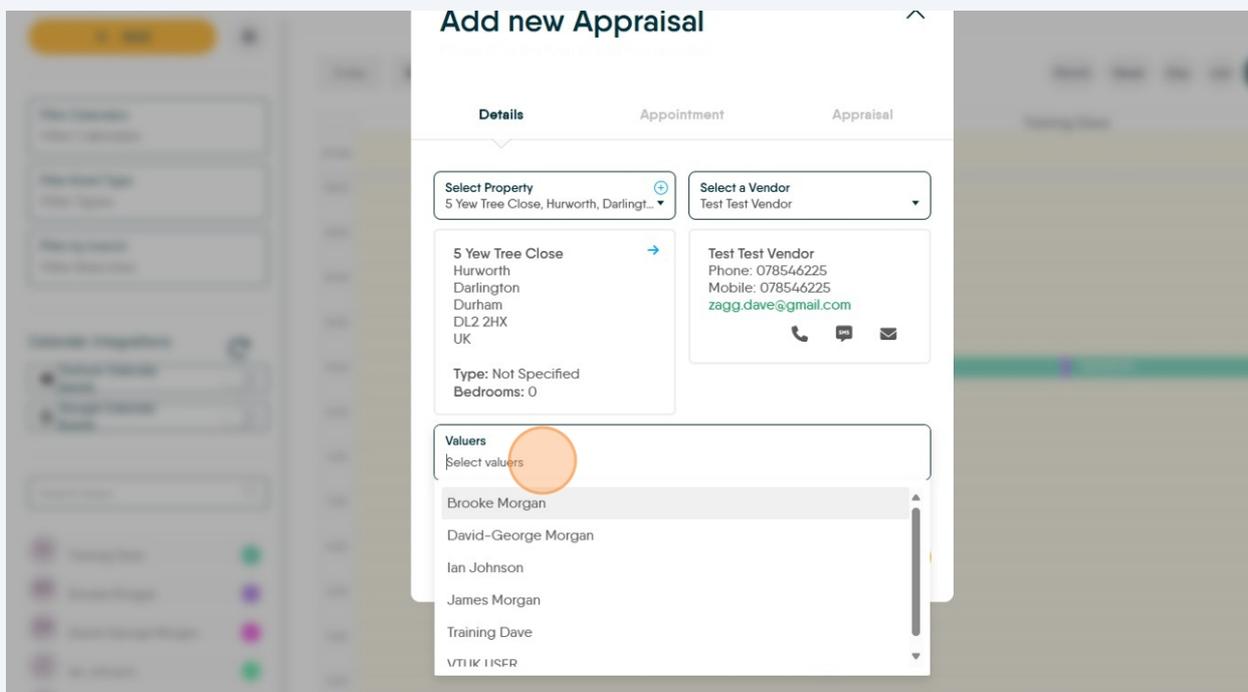
Click here and select the property. Clicking on the blue+ in the 'Select Property' field will allow you to add the basic details for a new property to the CRM.

Selecting the property details will auto populate the Vendor or Landlords screen.

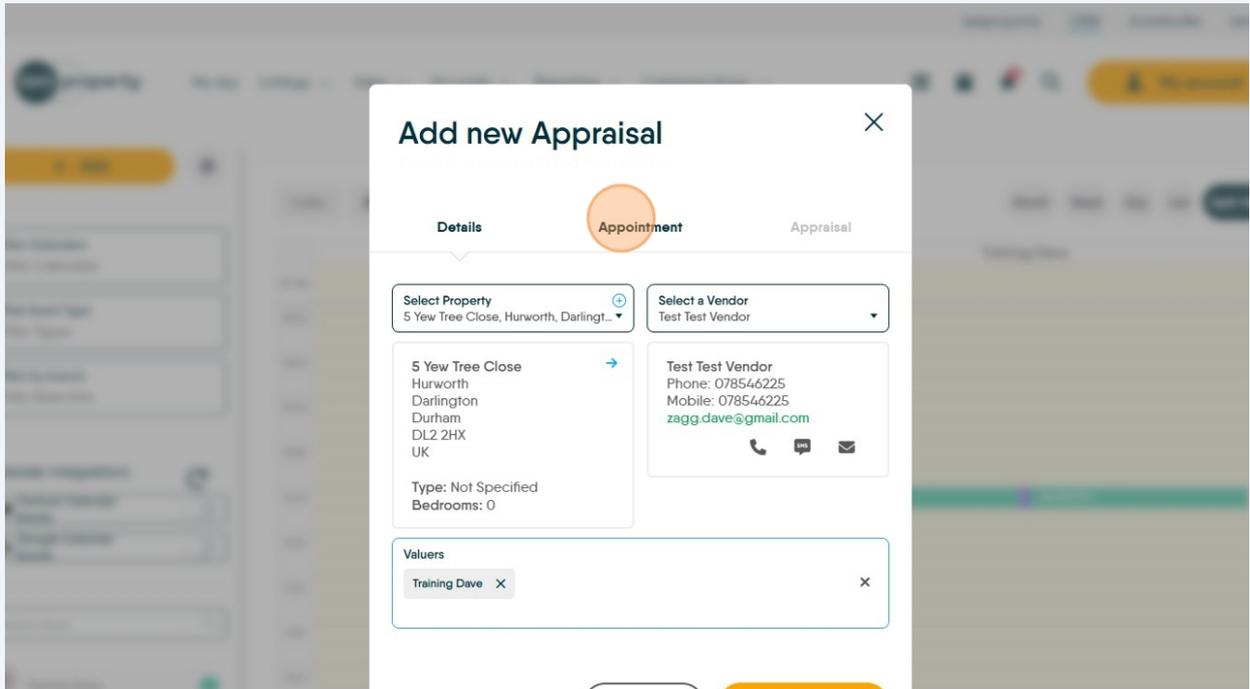


17

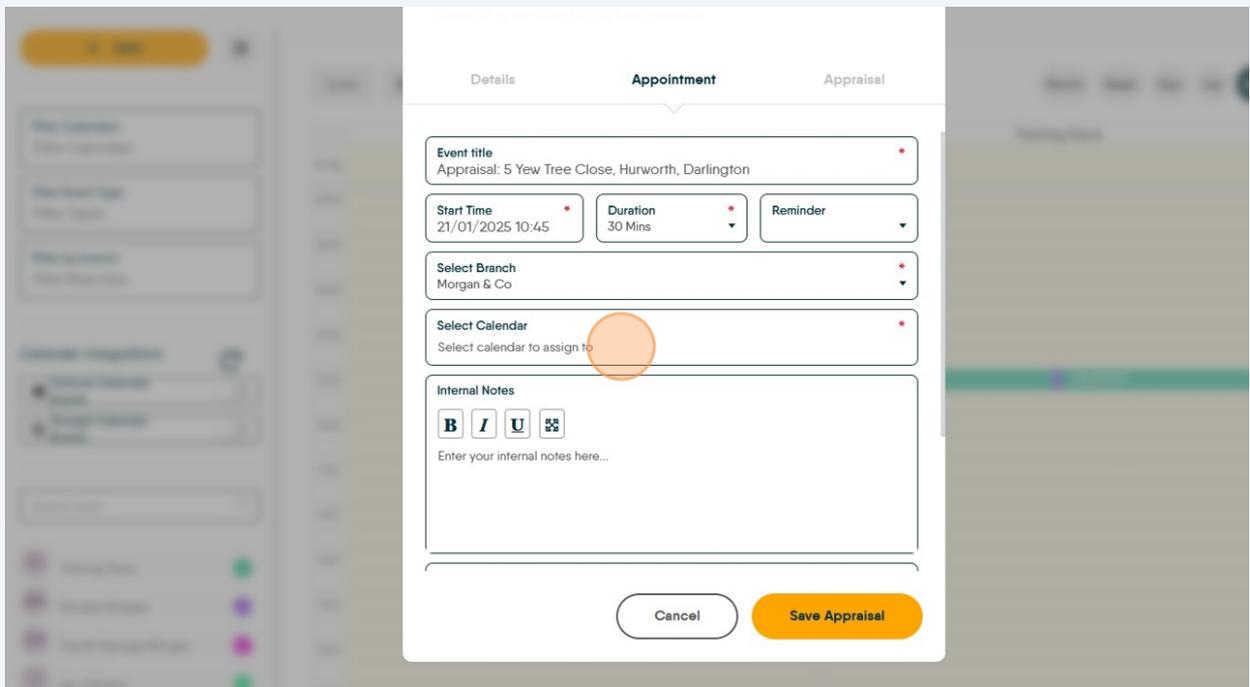
Click the "Select valuers" field and select the valuers you are using.

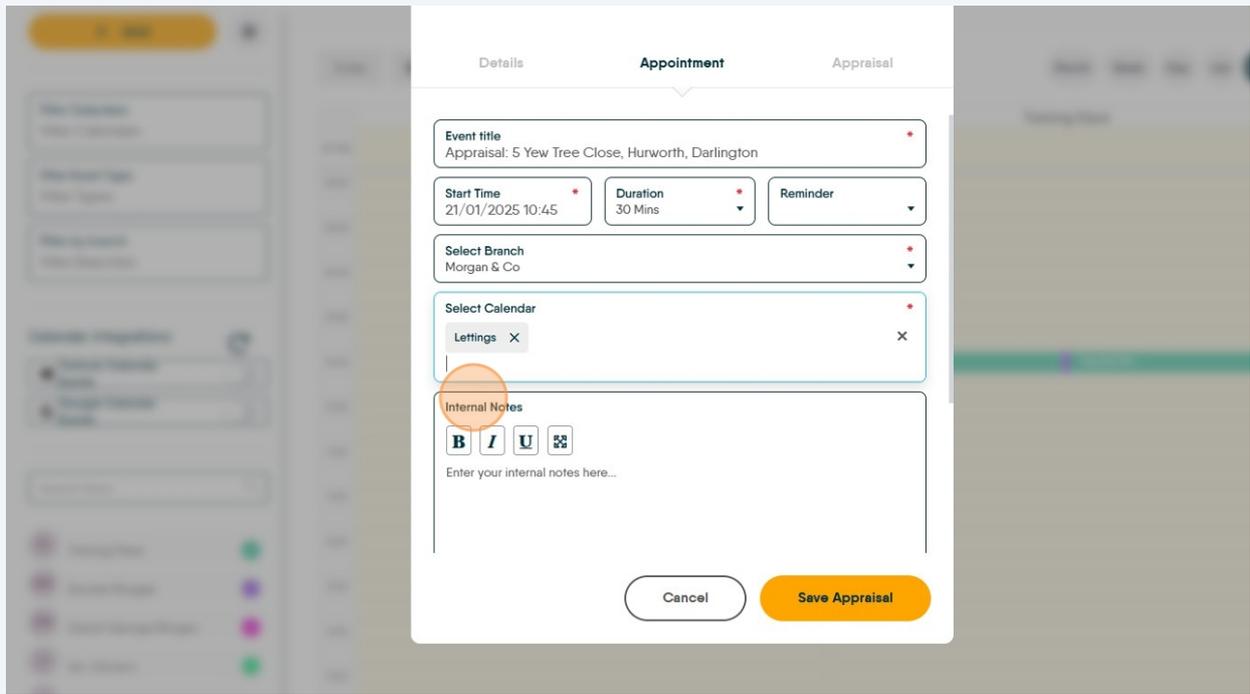


18 Click "Appointment"

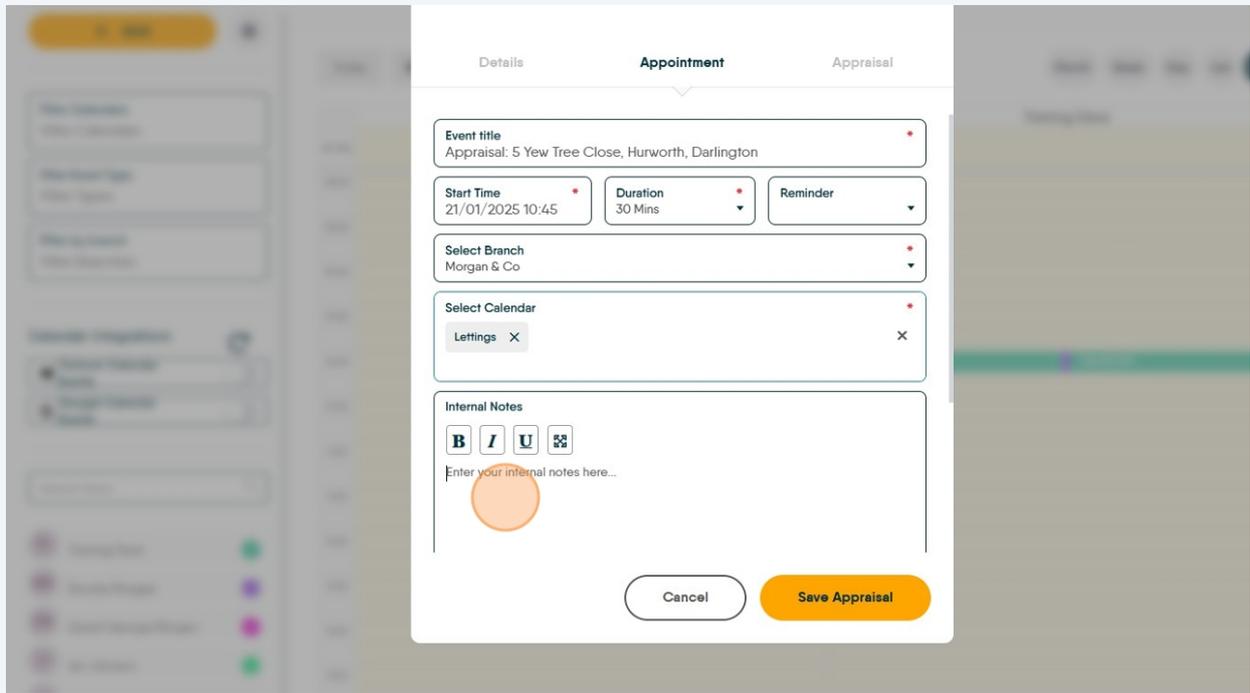


19 The Event Title is pre-set. Check the branch details are correct and then click the "Select calendar to assign to" field. Click Lettings or Sales (or the calendar you are using for your Appraisals) as required.





20 Click here to add any notes for the Valuer.



21

Click "Save Appraisal" The appraisal will then show in the Calendar and the Property record.

Details Appointment Appraisal

Event title *
Appraisal: 5 Yew Tree Close, Hurworth, Darlington

Start Time * 21/01/2025 10:45 Duration * 30 Mins Reminder

Select Branch *
Morgan & Co

Select Calendar *
Lettings X

Internal Notes
B I U Enter your internal notes here...

Cancel Save Appraisal

Add an Appraisal from the '+ Add' option in the Calendar

22

Click "Add"

iamproperty CRM movebutler

iam property My day Lettings Sales Accounts Reporting Communications My acc

+ Add

New Appointment +

New Check-In +

Filter Calendars
Filter Calendars

Filter Event Type
Filter Types

Filter by branch
Filter Branches

Calendar Integrations

Outlook Calendar Events

Google Calendar Events

Today Tue 21 Jan 2025 < 21 January 2025 > Month Week Day List

	David-George Morgan	Training Dave
all-day		
08:00		
08:30		
09:00		
09:30		
10:00		Appraisal Slot
10:30		Appraisal Slot
11:00		Appraisal: 5 Yew Tree Close, Hurworth, Darlington
11:30		
12:00		

23 Click here and select the type of Appraisal you are adding.

The process from here on is the same as shown above.

The screenshot displays a CRM calendar interface. On the left, a sidebar contains a '+ Add' button and a list of event creation buttons: 'New Appointment +', 'New Check-In +', 'New Checkout +', 'New Inventory +', 'New Inspection +', 'New Appraisal (Sales) +', 'New Appraisal (Lettings) +', 'New Viewing (Sales) +', 'New Viewing (Lettings) +', 'New Viewing Open House (Sales) +', and 'New Viewing Open House (Lettings) +'. Below these are filter sections for 'Filter Calendars' and 'Filter Event Type'. The main calendar area shows a grid for 'Tue 21 Jan 2025'. The calendar is titled 'David-George Morgan' and 'Training Dave'. Two events are visible: 'Appraisal Slot' at 10:00 and 'Appraisal: 5 Yew Tree Close, Hurworth, Darlington' at 11:00. The 'New Appraisal (Lettings) +' button in the sidebar is highlighted with an orange circle.

Sending Confirmation Emails/SMS



Alert! This process can be automated using CRM Automations, confirmations and reminders can be sent out at timescales to suit you with your wording. Ask Onboarding or your Account Manager.

24 Once the Appraisal is saved, click on the email or SMS icons

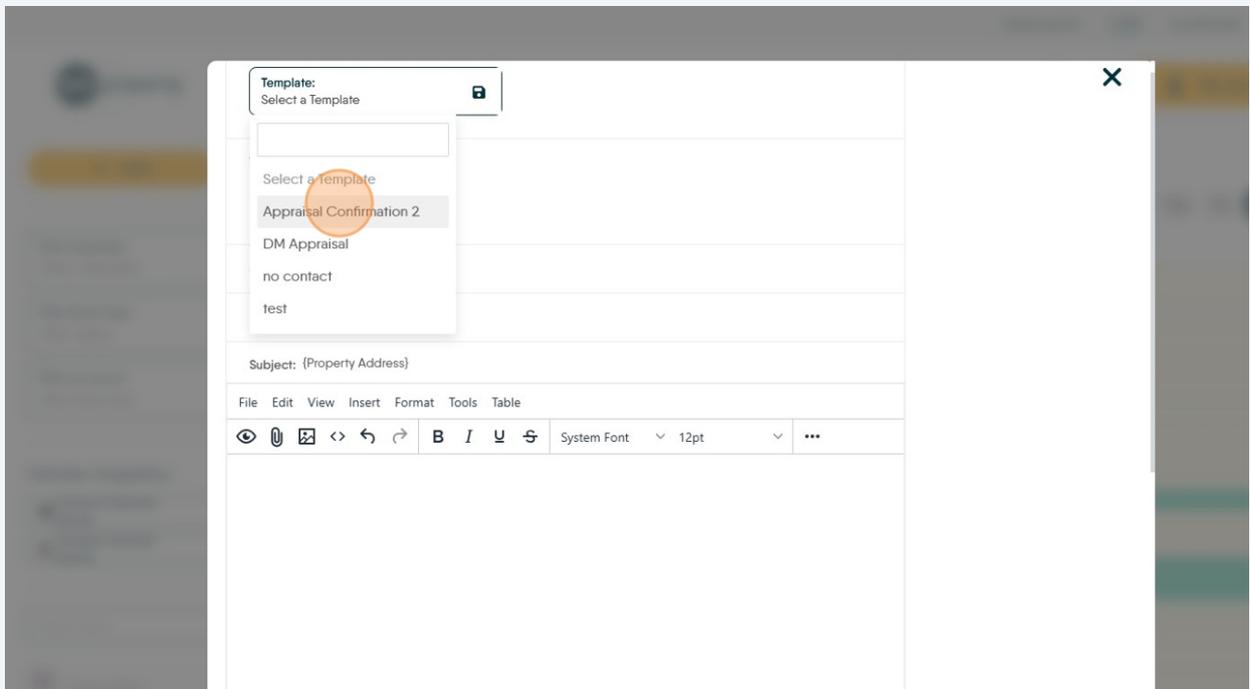
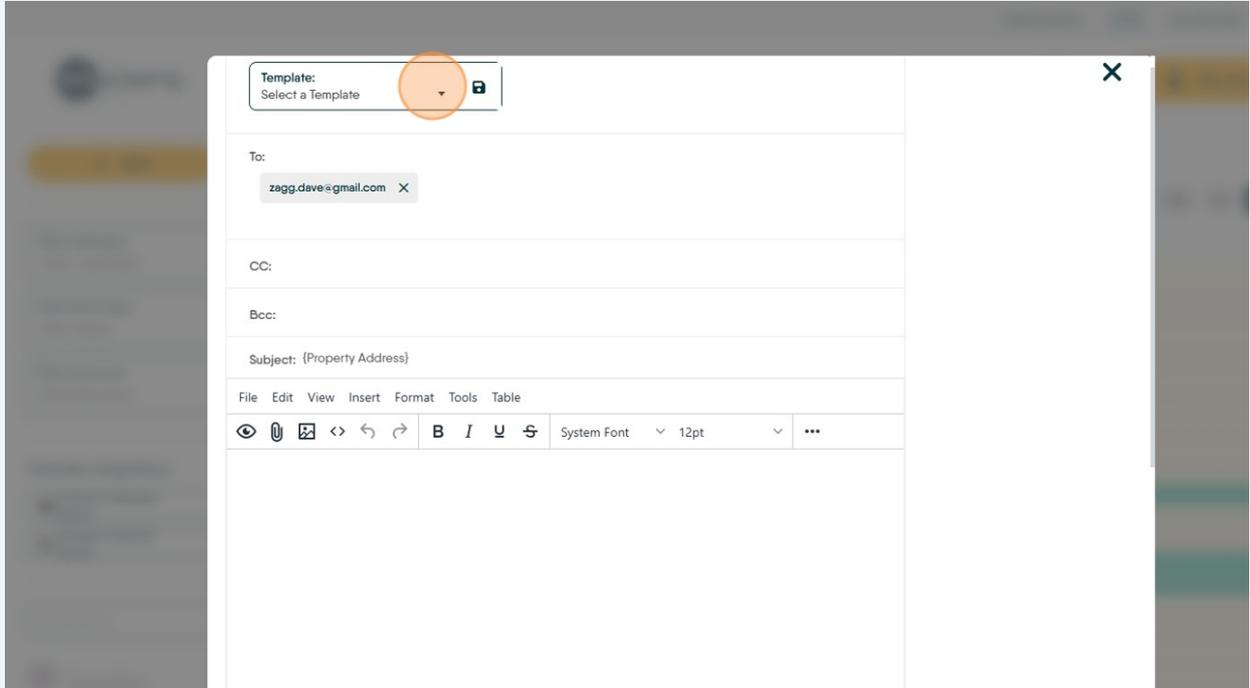
The screenshot shows a mobile application interface for adding a new appraisal. The form is titled "Add new Appraisal" and has three tabs: "Details", "Appointment", and "Appraisal". The "Details" tab is active. It contains several sections: "Select Property" with a dropdown menu showing "5 Yew Tree Close, Hurworth, Darlingt..."; "Select a Vendor" with a dropdown menu showing "Test Test Vendor"; a detailed view of the property "5 Yew Tree Close" in Hurworth, Darlington, Durham, DL2 2HX, UK, with "Type: Not Specified" and "Bedrooms: 0"; a detailed view of the vendor "Test Test Vendor" with phone numbers "078546225" and "078546225", and email "zagg.dave@gmail.com"; and a "Valuers" section with a tag for "Training Dave". At the bottom, there are "Cancel" and "Save Appraisal" buttons. An orange circle highlights the email icon in the vendor details, and a "Send Email" button is visible below it.

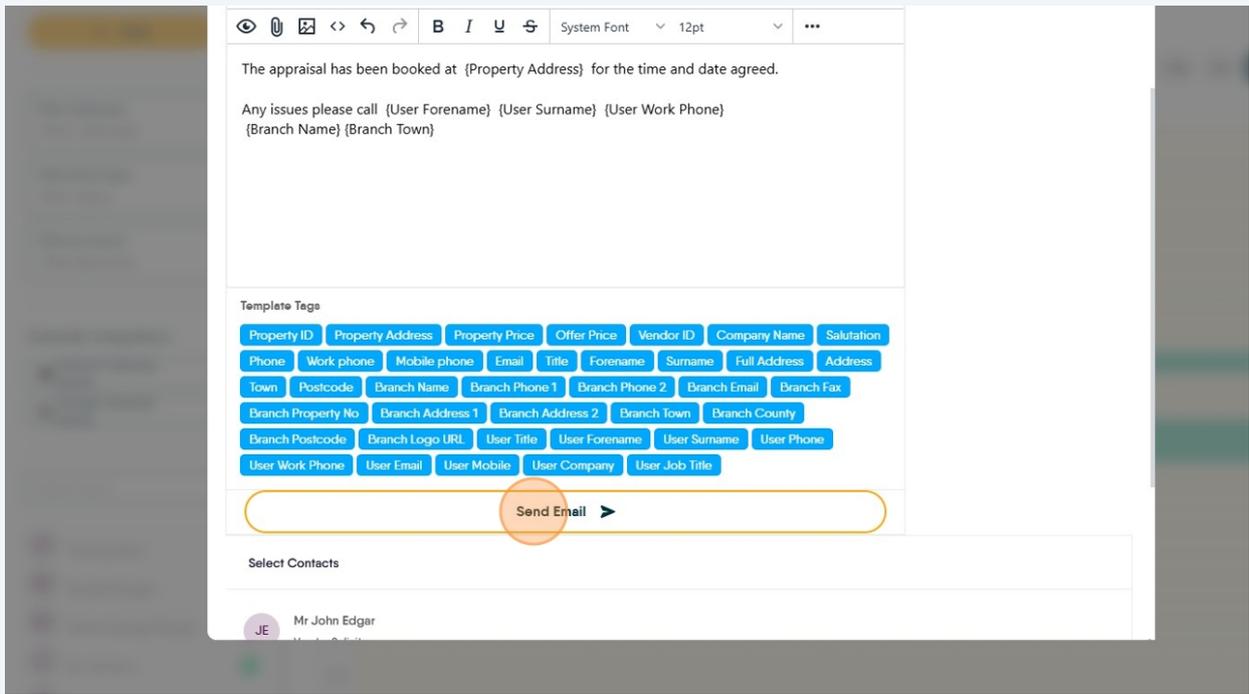
25 Click here. Either type your message or use the Template option to use a pre-set template, or create a new template.

The screenshot shows an email composition screen. The "To:" field is filled with "zagg.dave@gmail.com". The "Subject:" field contains the placeholder text "(Property Address)". Below the subject field is a menu bar with options: "File", "Edit", "View", "Insert", "Format", "Tools", and "Table". Below the menu bar is a rich text editor toolbar with icons for undo, redo, bold, italic, underline, strikethrough, text color, and background color. The text area below the toolbar is empty, and an orange circle highlights the cursor at the beginning of the text area. At the bottom, there is a "Template Tags" section with a grid of tags: "Property ID", "Property Address", "Property Price", "Offer Price", "Vendor ID", "Company Name", "Salutation", "Phone", "Work phone", "Mobile phone", "Email", "Title", "Forename", "Surname", "Full Address", and "Address".

26 Click here to select a template.

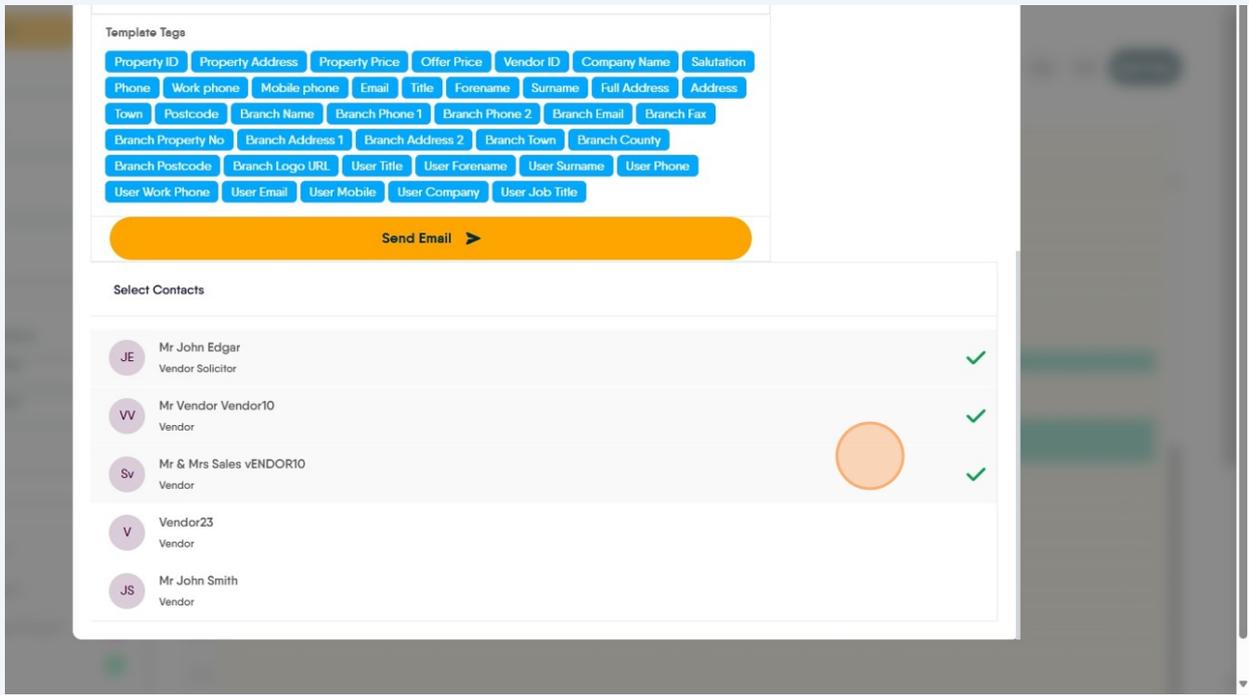
Templates are created by you, there are no default templates.
Click "Appraisal Confirmation 2"
Click "Send Email"





27

If you want to send the email to other contacts for that property, scroll down the screen and select from the list.

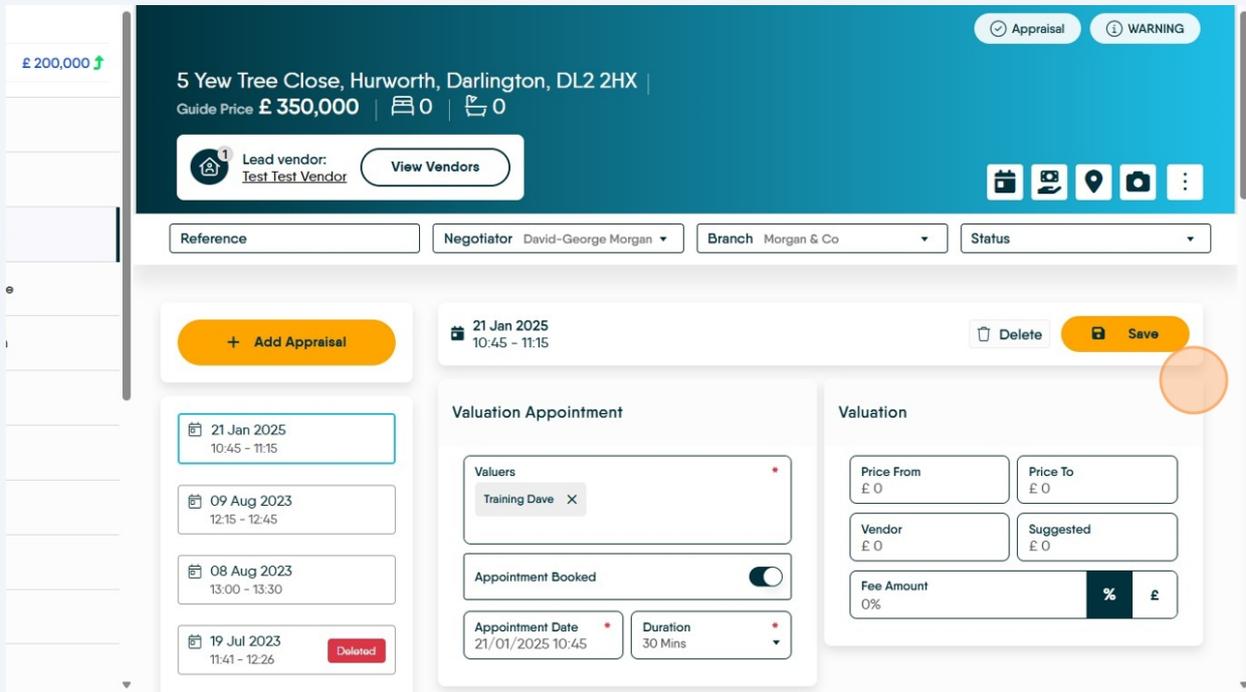


Completing the Appraisal

28

The appraisal can be completed from anywhere that it is viewable in the CRM - Property Record, Calendar or Activity List.

Complete the Valuation fields.



£ 200,000 ↑

5 Yew Tree Close, Hurworth, Darlington, DL2 2HX |
Guide Price £ 350,000 | 📞 0 | 📍 0

Lead vendor: Test Test Vendor | View Vendors

Appraisal | WARNING

Reference | Negotiator David-George Morgan | Branch Morgan & Co | Status

+ Add Appraisal

21 Jan 2025 10:45 - 11:15 | Delete | Save

Valuation Appointment

Valuers: Training Dave X

Appointment Booked:

Appointment Date: 21/01/2025 10:45 | Duration: 30 Mins

Valuation

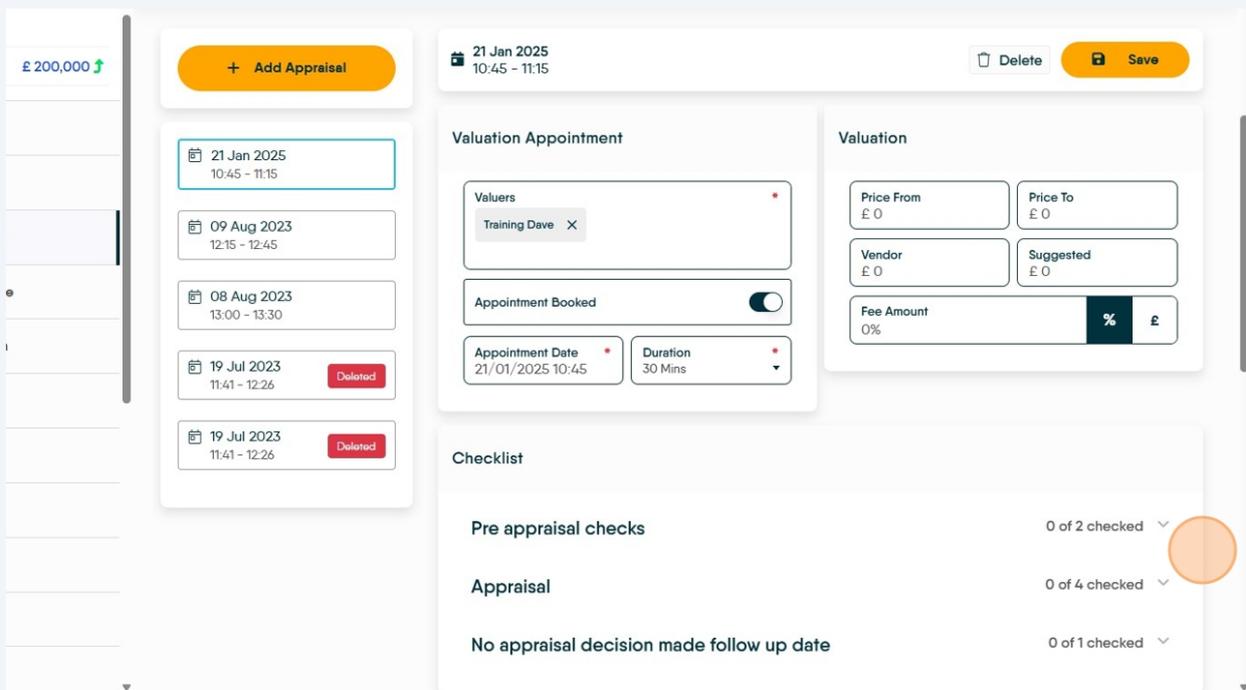
Price From: £ 0 | Price To: £ 0

Vendor: £ 0 | Suggested: £ 0

Fee Amount: 0% | % | £

29

Click here and complete any checklists.



£ 200,000 ↑

+ Add Appraisal

21 Jan 2025 10:45 - 11:15 | Delete | Save

Valuation Appointment

Valuers: Training Dave X

Appointment Booked:

Appointment Date: 21/01/2025 10:45 | Duration: 30 Mins

Valuation

Price From: £ 0 | Price To: £ 0

Vendor: £ 0 | Suggested: £ 0

Fee Amount: 0% | % | £

Checklist

Pre appraisal checks 0 of 2 checked ▾

Appraisal 0 of 4 checked ▾

No appraisal decision made follow up date 0 of 1 checked ▾

30

Click here and complete any Notes and if you know, complete the Outcome..

The screenshot shows a web interface with a sidebar on the left displaying a value of £200,000 with a green upward arrow. The main content area is divided into two sections. The top section, titled 'Comments/Notes', contains two side-by-side text input fields. The left field is labeled 'Internal Notes' and has a toolbar with icons for Bold (B), Italic (I), Underline (U), and a list icon. Below the field is the placeholder text 'Enter your internal notes here...'. The right field is labeled 'Client Advice' and has the same toolbar. Below it is the placeholder text 'Enter client advice here...'. The bottom section, titled 'Outcome', contains two dropdown menus: 'Status' and 'Lost To Agent'. Below these is a text input field labeled 'Notes' with the same toolbar as the 'Internal Notes' field and the placeholder text 'Enter outcome notes here...'. An orange circle highlights the right side of the 'Outcome' section.

31

Outcome is if you have won or lost the business and if lost, who the business was lost to and why.

This is useful information to run a report showing if a competitor is gaining business from you and allowing investigations to be made.

This is also reported in the Activity list as Appraisal Not Concluded, noting this outcome either from here or the activity list clears the listing.

£ 200,000 ↑

Comments/Notes

Internal Notes

B *I* U ☒

Enter your internal notes here...

Client Advice

B *I* U ☒

Enter client advice here...

Outcome

Status

|

Lost

Won

— — — —

Enter outcome notes here...

5 Viewings

1 Offers £ 200,000 ↑

🏠 Details

✅ Checklist

🏠 Appraisals

🛡️ Compliance

ℹ️ Information

📊 Stats

📄 Marketing

📱 Media

🏠 Rooms

🌐 Portals

👁️ Viewings

Comments/Notes

Internal Notes

B *I* U ☒

Enter your internal notes here...

Client Advice

B *I* U ☒

Enter client advice here...

Outcome

Status

|

Lost

Won

— — — —

Enter outcome notes here...

- Viewings
- Offers £ 200,000 ↑
- Details
- Checklist
- Appraisals
- Compliance
- Information
- Stats
- Marketing
- Media
- Rooms
- Portals
- Viewings

Comments/Notes

Internal Notes

B *I* U

Enter your internal notes here...

- Brown & Co
- Green & Co
- John Wood's
- Penny's
- Stag's
- Turner & Co
- Lost To Agent

Client Advice

B *I* U

Enter client advice here...

Notes

B *I* U

Enter outcome notes here...

£ 200,000 ↑

Enter your internal notes here...

Enter client advice here...

Outcome

Status
Won

Lost To Agent

Notes

B *I* U

Enter outcome notes here...

21 Jan 2025
10:45 - 11:15

Delete

Save