# How To... Add 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 organization in property management.

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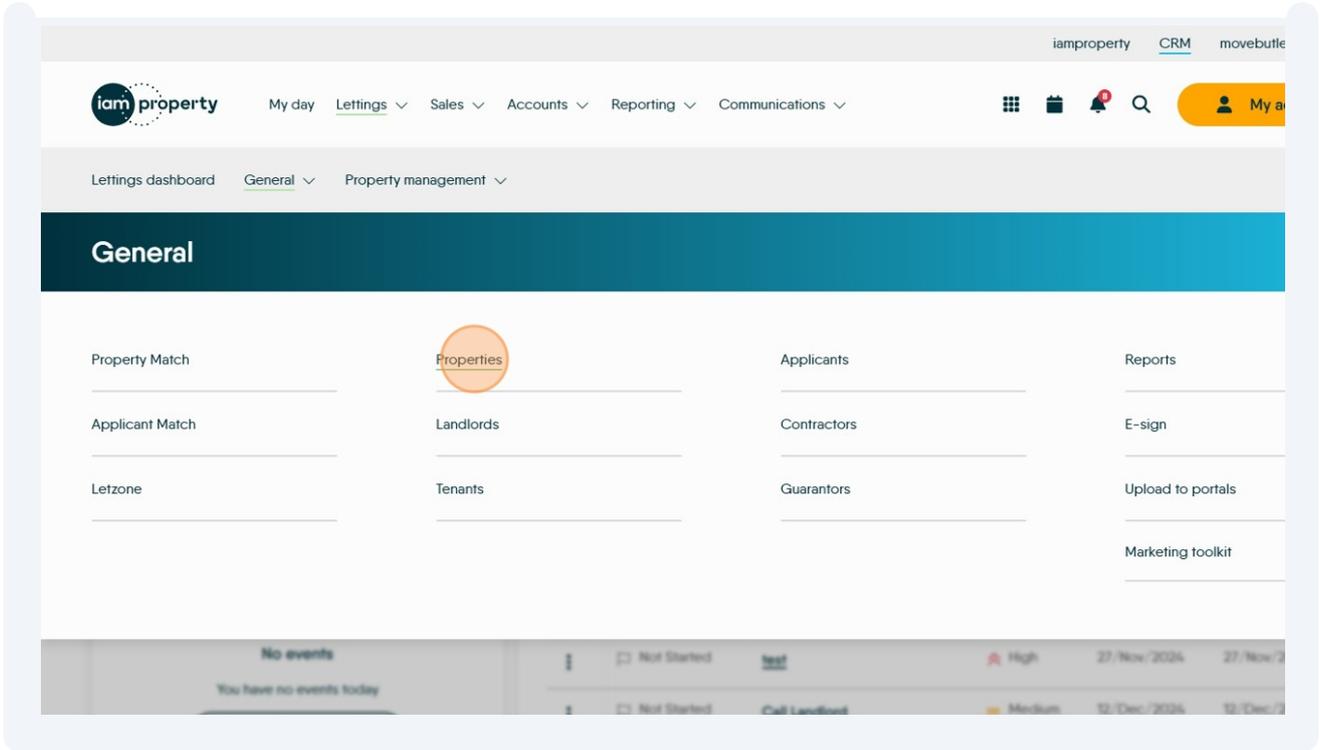
**2** To find a property from the the list of Properties you have on CRM. Click "Lettings", then click "General", then click "Properties" this will take you to a list of your properties

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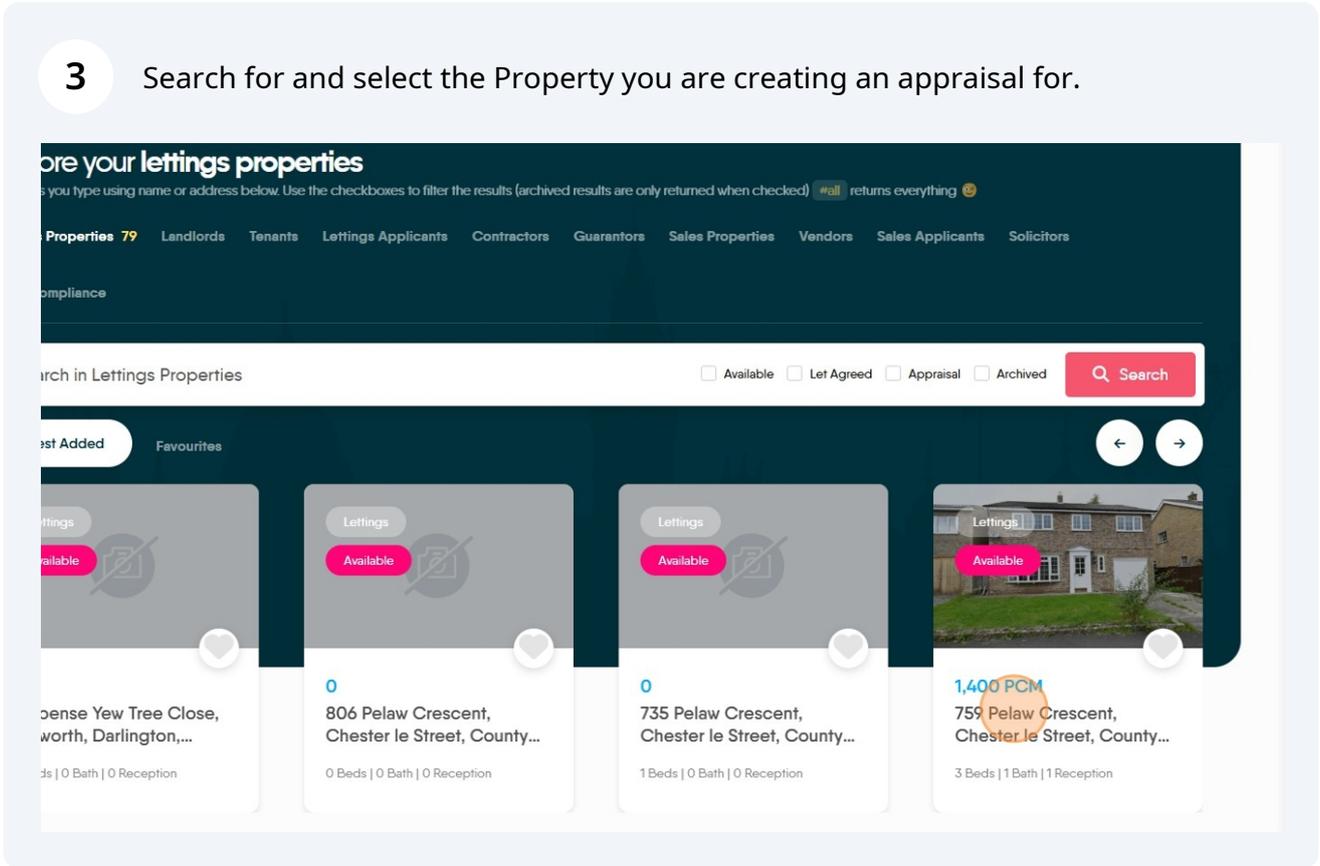


ⓘ Tip! If you are already in a property record, start from here.
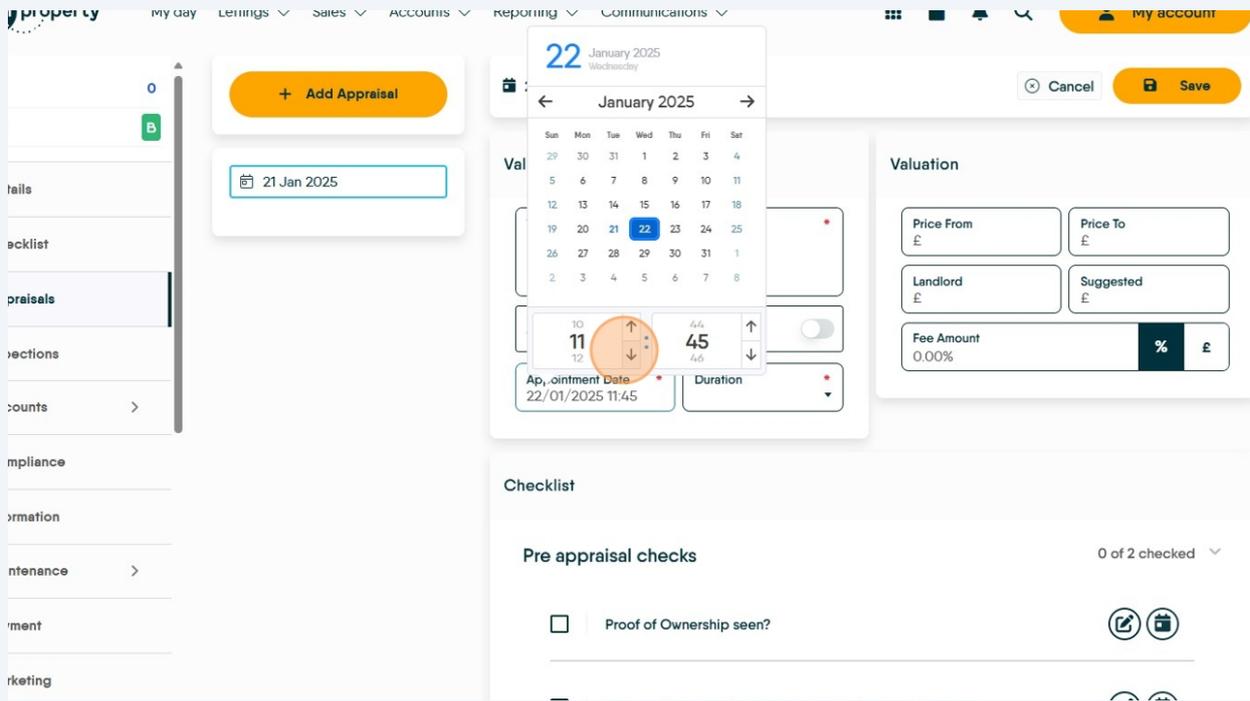
**4** Click "Appraisals"



**5** Click "Add Appraisal"

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

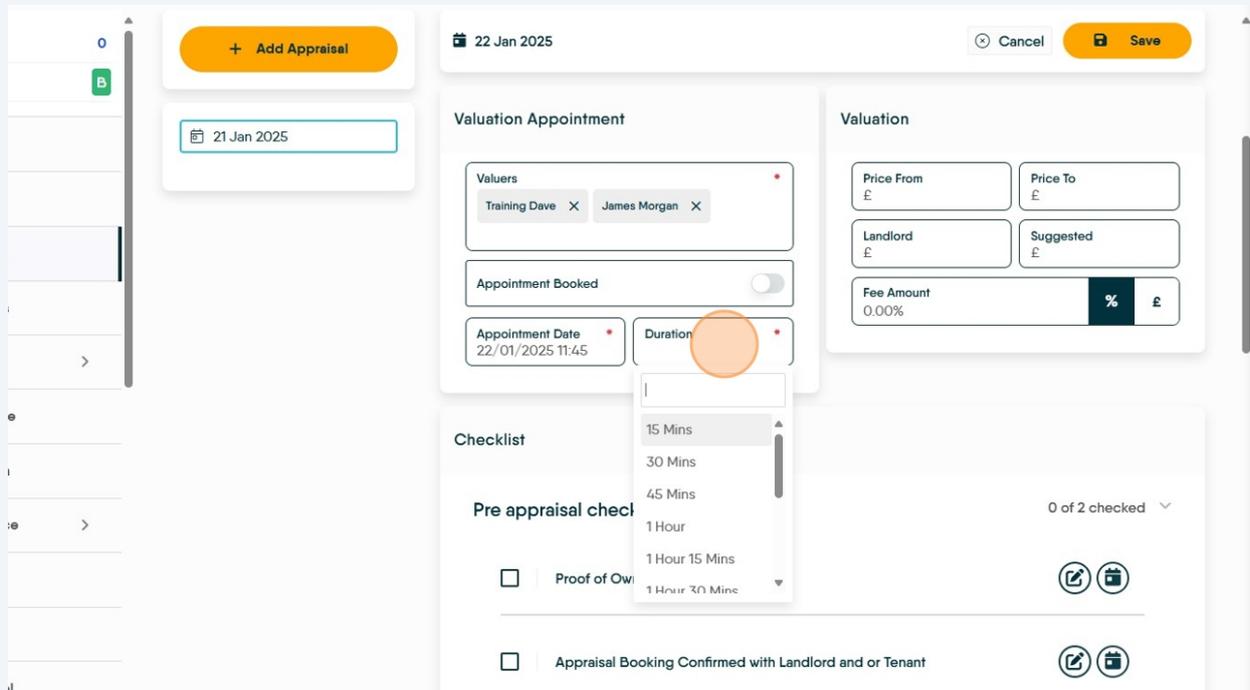**7** Click here to set the appointment date and time.



**8** Click here to set the duration of the appointment.
For example click "45 Mins"
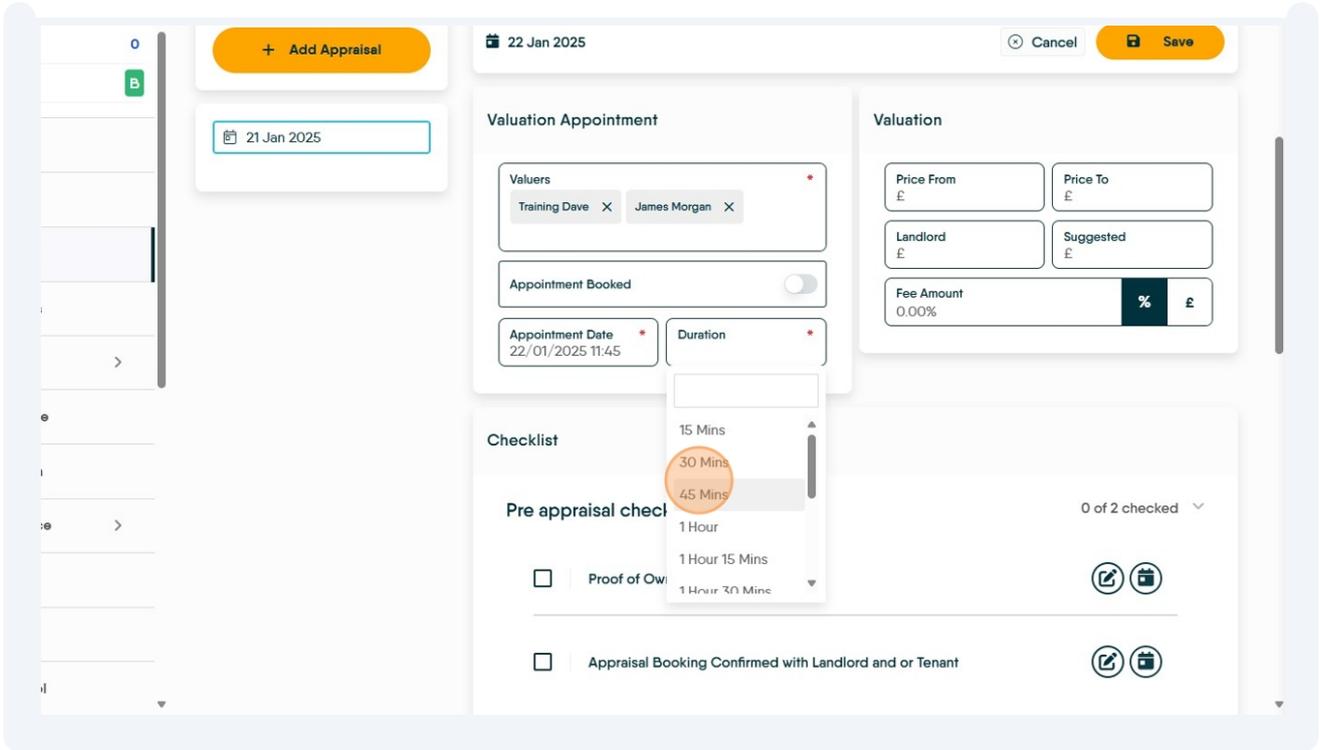
**9** Click here to view and complete any checklists you have created and applied to this area of CRM.
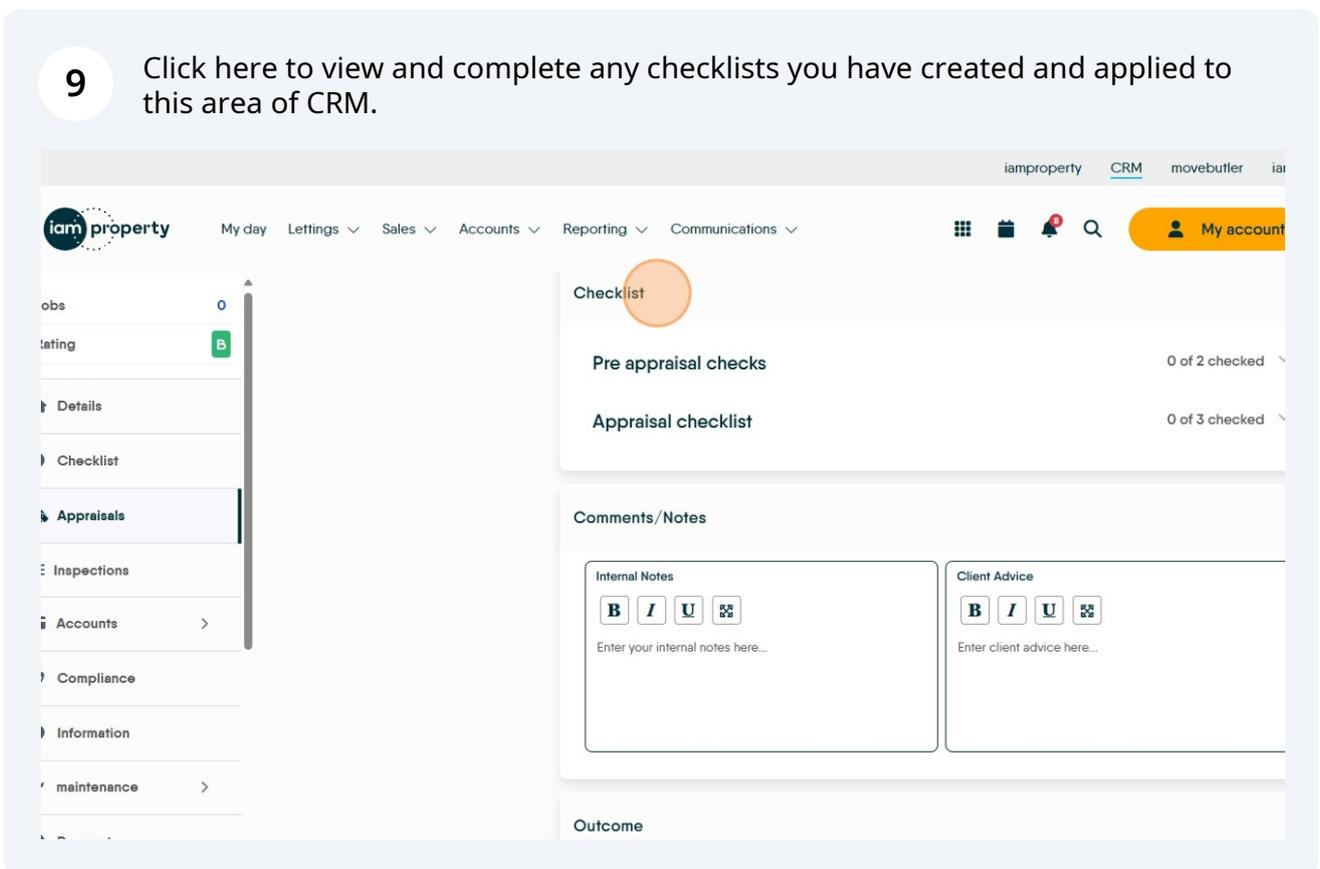
**10** Click "Enter your internal notes here..." this will be available in the Calendar entry for the appraisal. These are notes added for your information.

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



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

# Creating an Appraisal Appointment in the Calendar

**12**  Click "Calendar"
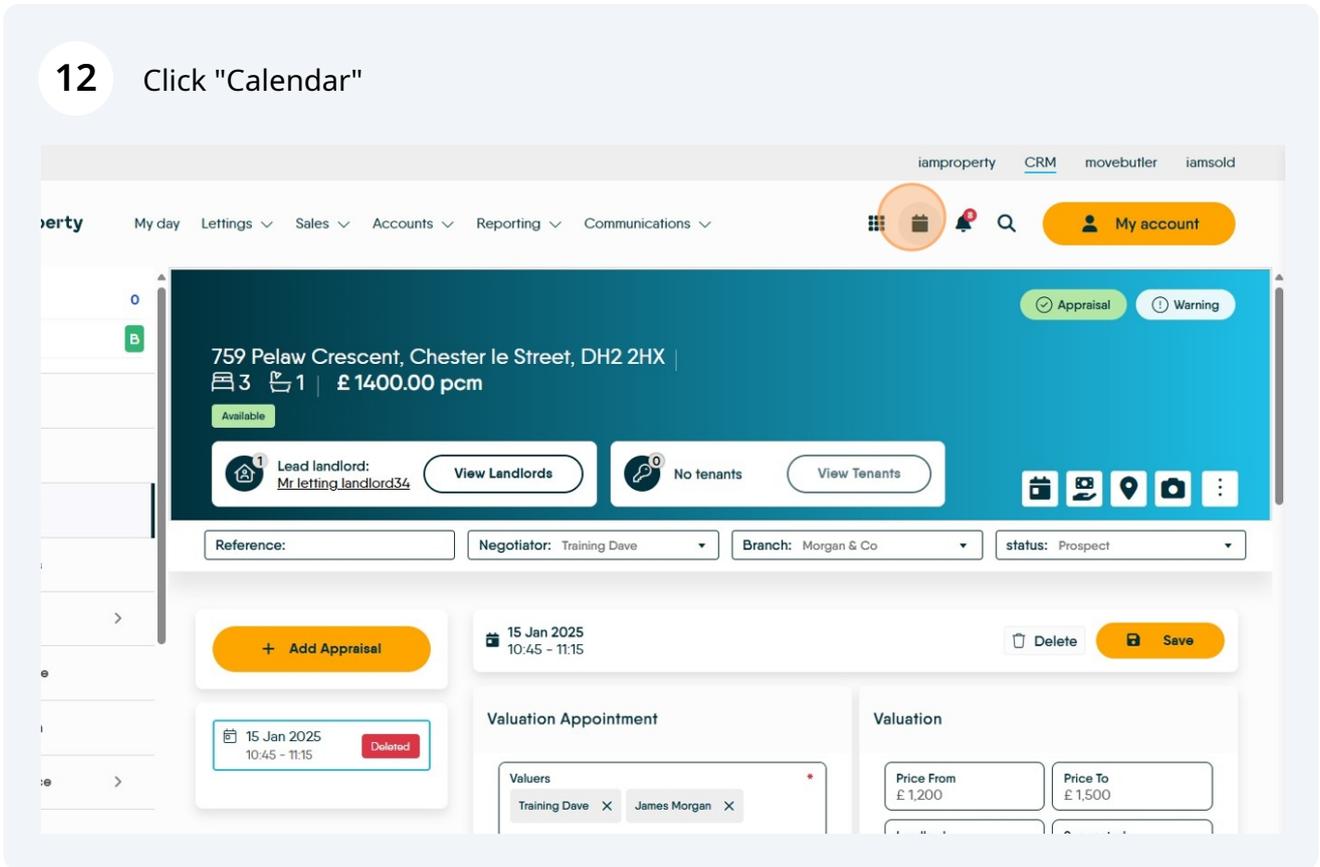
**13** Find the date and time you are creating the appraisal for and right-click.
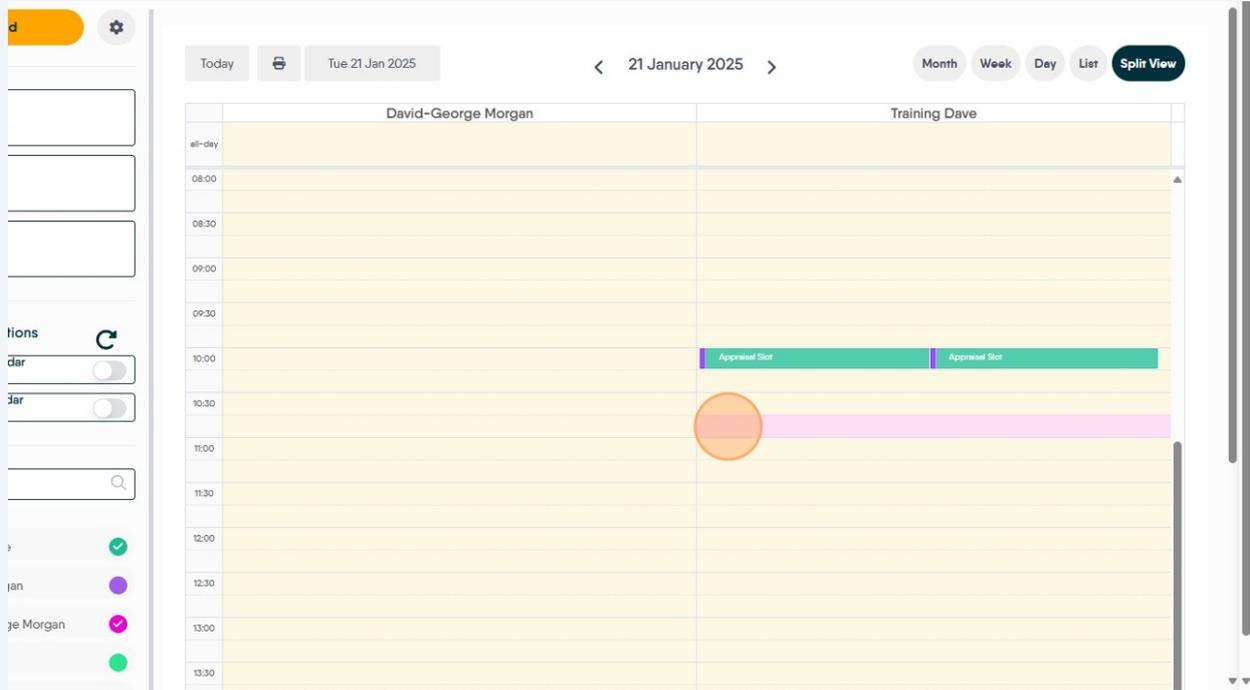


**14** Click "Sales" or Click "Lettings"
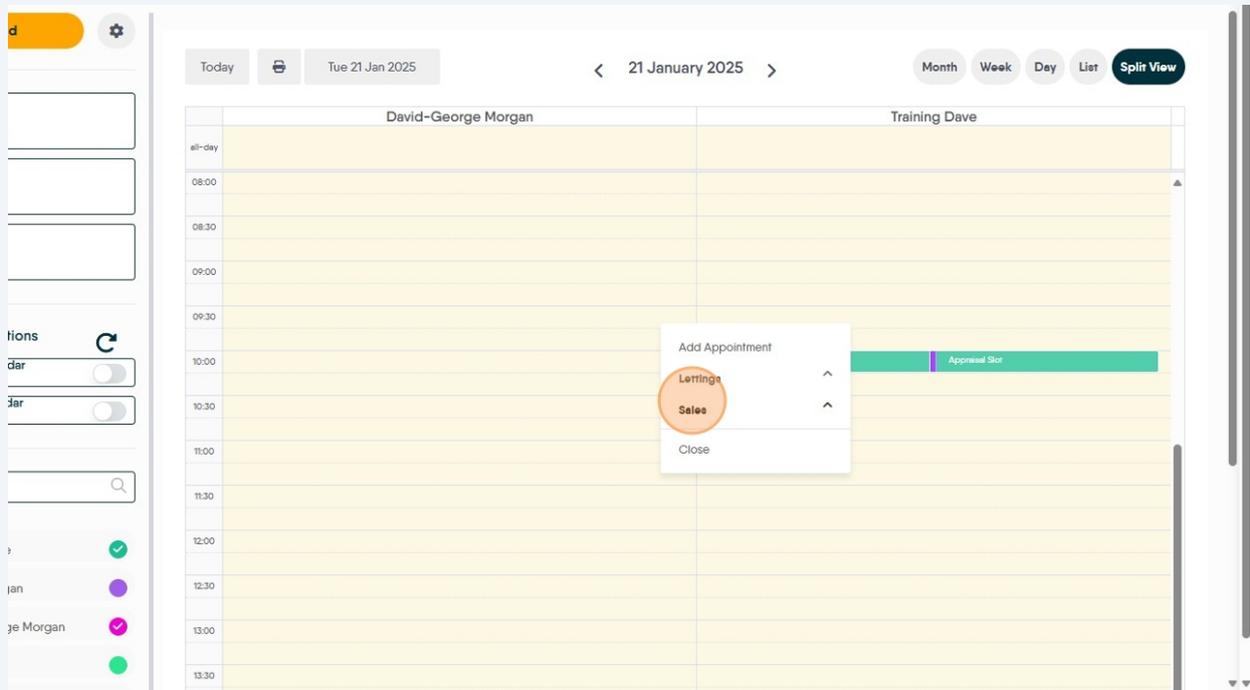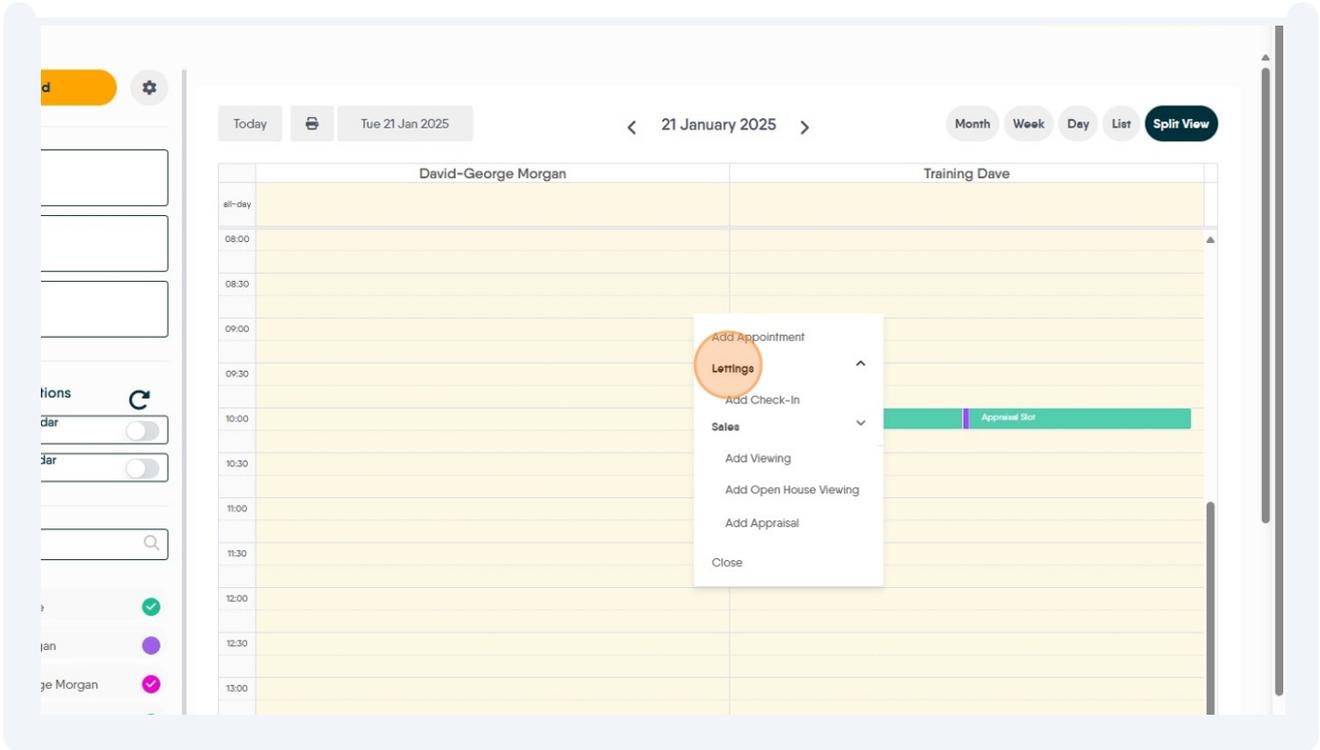
**15** Click "Add Appraisal", as previously the process is the the same for Sales and Lettings
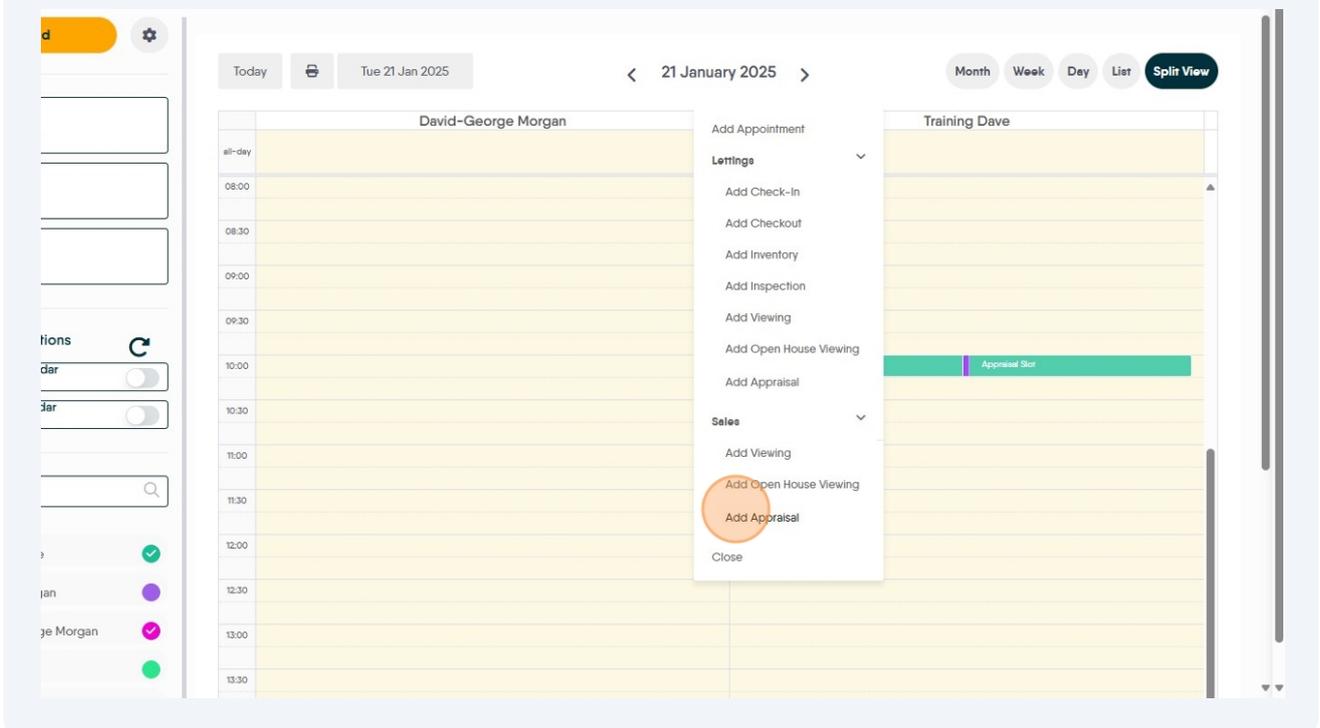
**16** Click here and select the property. Clicking on the blue+ in the 'Select Property' field will allow you to add the basic details for a new property to the CRM.

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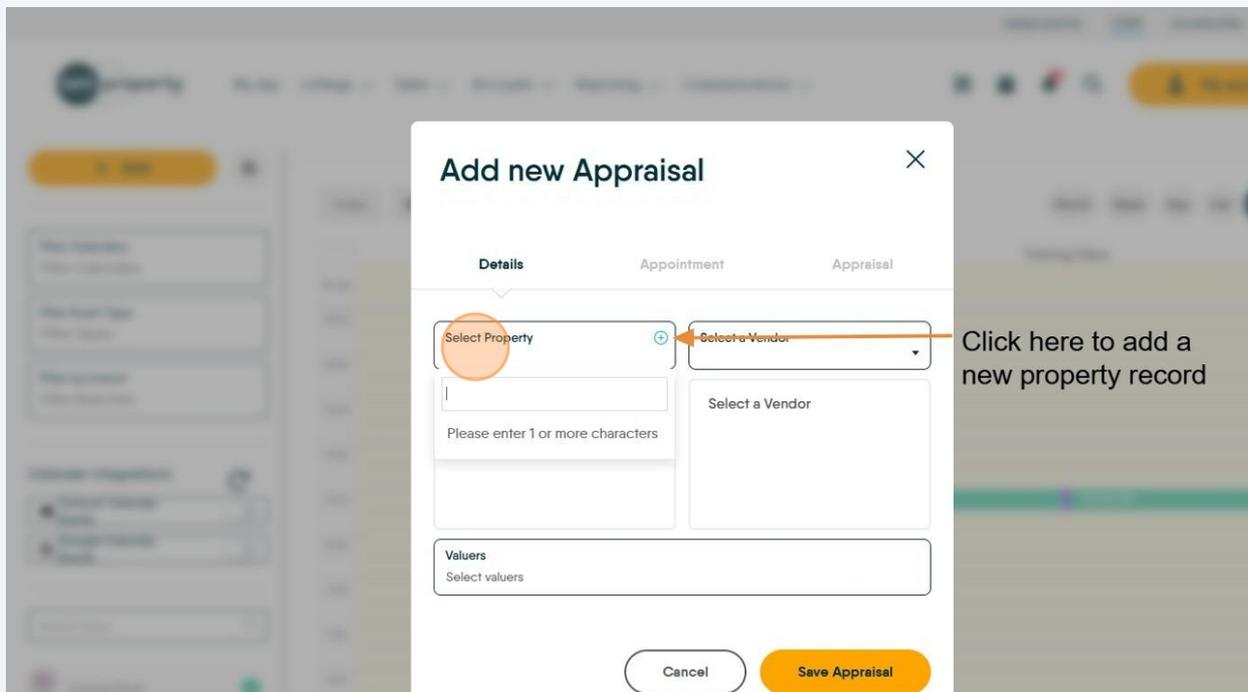


**17** Click the "Select valuers" field and select the valuers you are using.
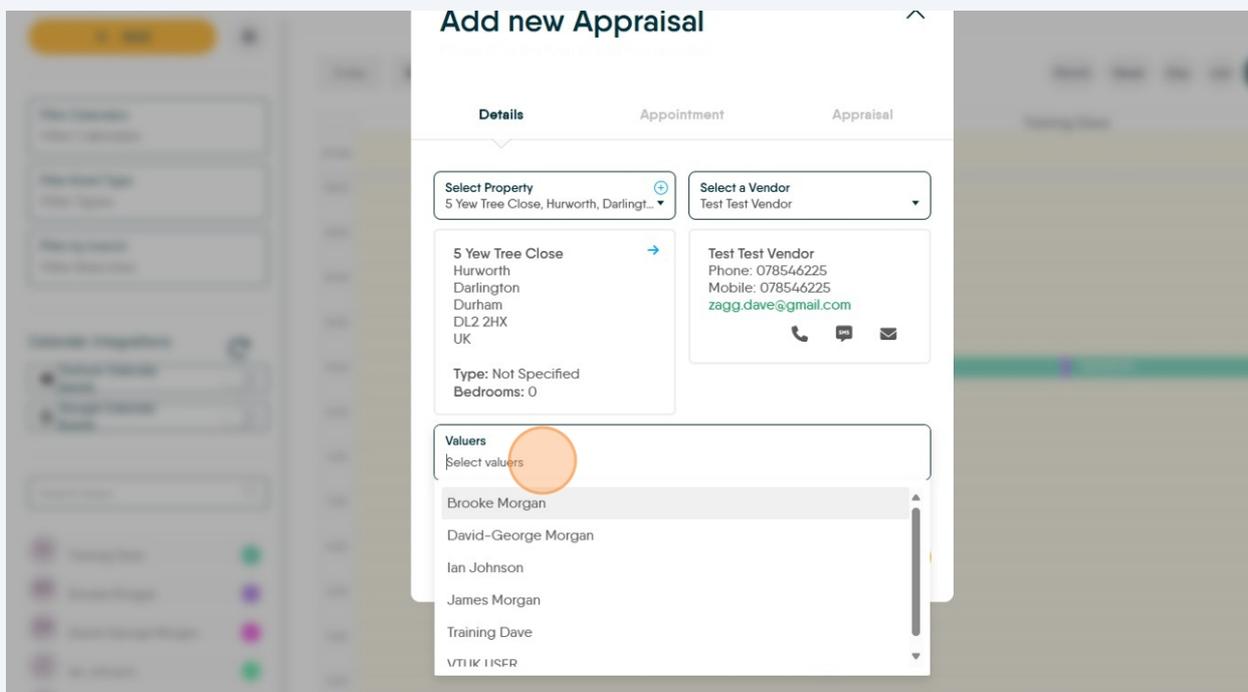
**18**  Click "Appointment"
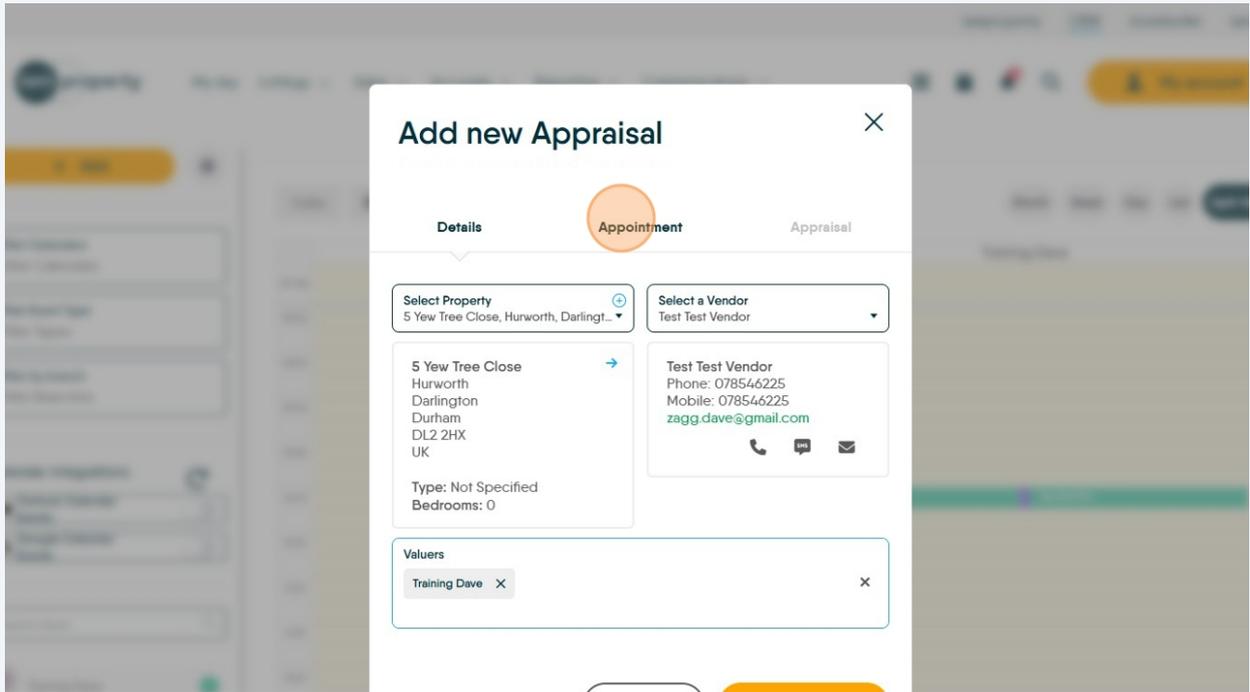


**19**  The Event Title is preset. Check the branch details are correct and then click the "Select calendar to assign to" field. Click Lettings or Sales (or the calendar you are using for your Appraisals) as required.
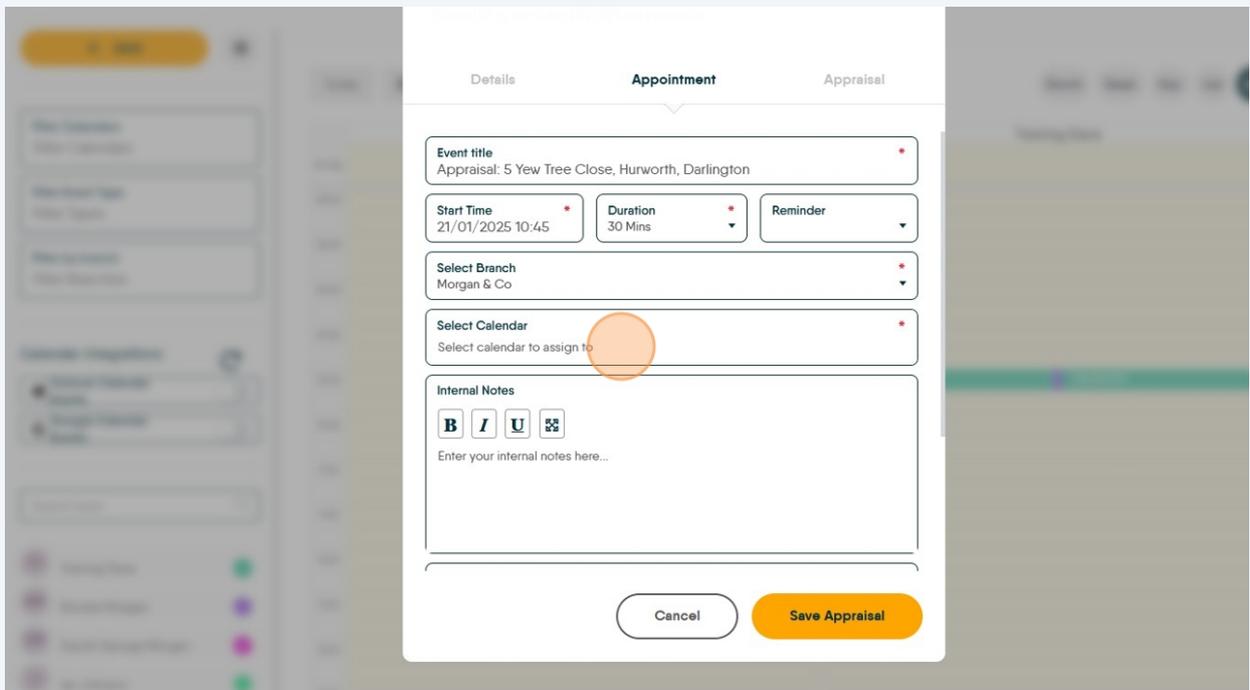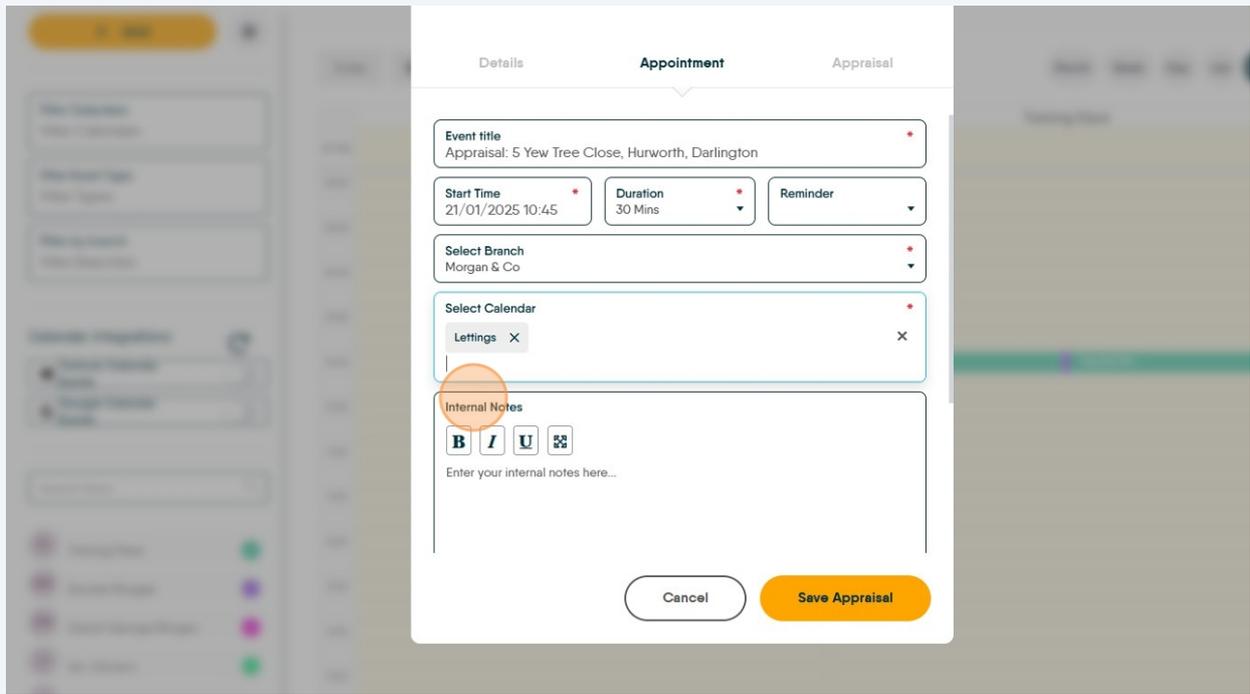
**20**  Click here to add any notes for the Valuer.
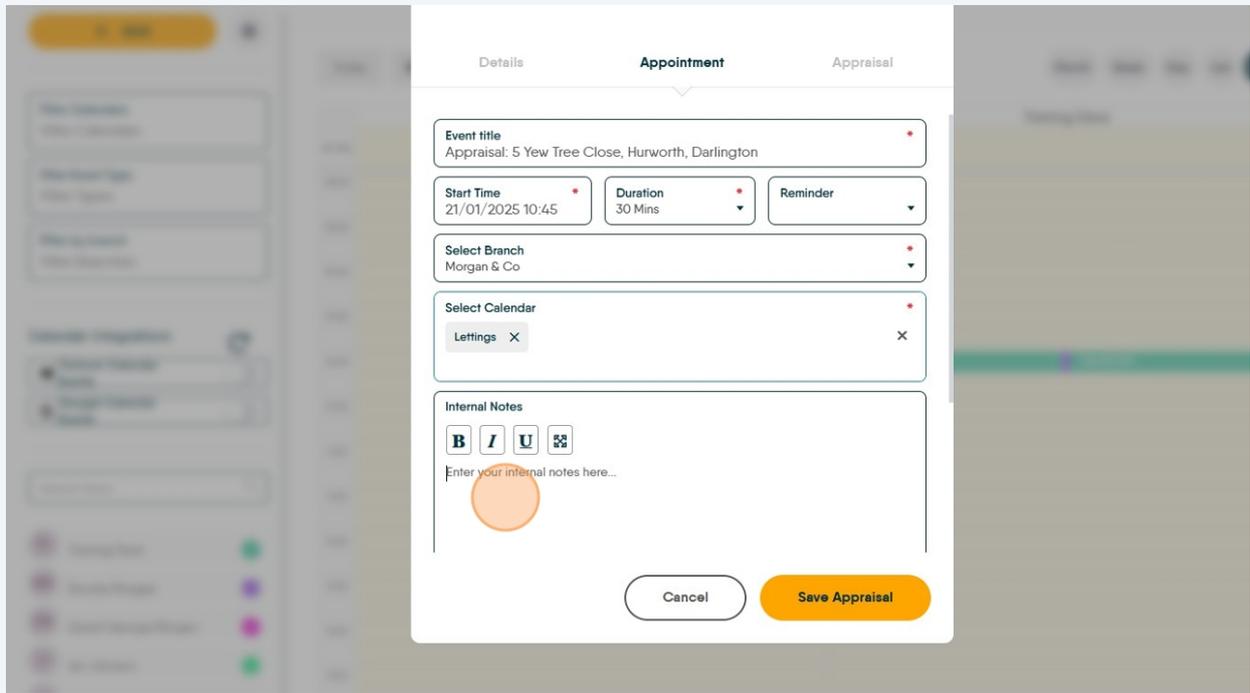
**21** Click "Save Appraisal" The appraisal will then show in the Calendar and the Property record.



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

**22** Click "Add"

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

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



# 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
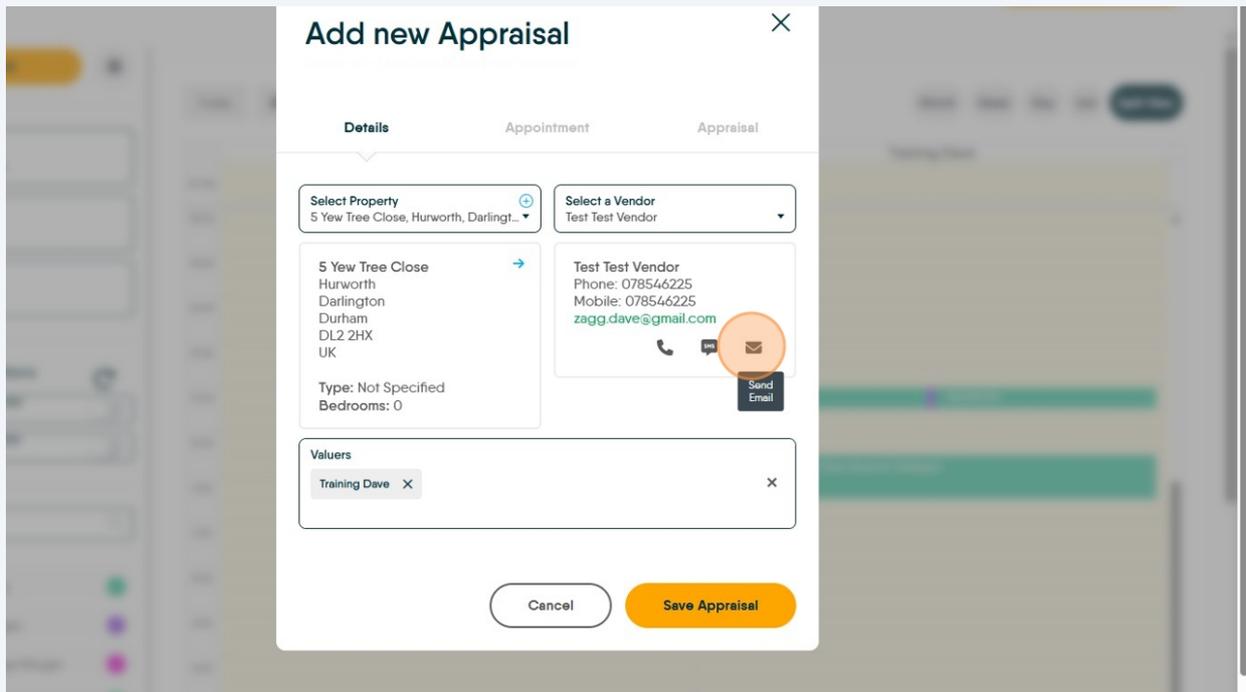


**25** Click here. Either type your message or use the Template option to use a pre set template, or create a new template.
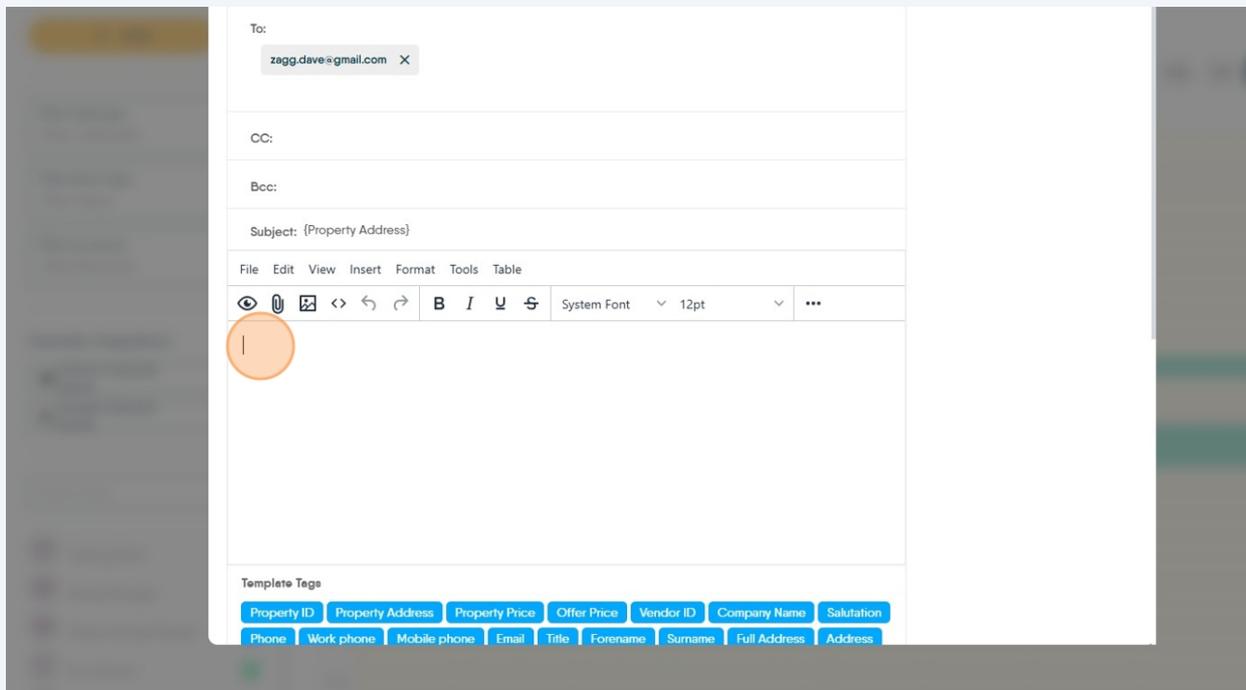
**26** Click here to select a template.

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

The appraisal has been booked at {Property Address} for the time and date agreed.

Any issues please call {User Forename} {User Surname} {User Work Phone} {Branch Name} {Branch Town}

Template 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 | Address
Town | Postcode | Branch Name | Branch Phone 1 | Branch Phone 2 | Branch Email | Branch Fax
Branch Property No | Branch Address 1 | Branch Address 2 | Branch Town | Branch County
Branch Postcode | Branch Logo URL | User Title | User Forename | User Surname | User Phone
User Work Phone | User Email | User Mobile | User Company | User Job Title

Send Email ➤

Select Contacts

JE    Mr John Edgar

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

Template 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 | Address
Town | Postcode | Branch Name | Branch Phone 1 | Branch Phone 2 | Branch Email | Branch Fax
Branch Property No | Branch Address 1 | Branch Address 2 | Branch Town | Branch County
Branch Postcode | Branch Logo URL | User Title | User Forename | User Surname | User Phone
User Work Phone | User Email | User Mobile | User Company | User Job Title

Send Email ➤

Select Contacts

JE    Mr John Edgar
      Vendor Solicitor                                          ✓

VV    Mr Vendor Vendor10
      Vendor                                                    ✓

Sv    Mr & Mrs Sales vENDOR10
      Vendor                                                    ✓

V     Vendor23
      Vendor

JS    Mr John Smith
      Vendor

# 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.



**29** Click here and complete any checklists.

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

**Comments/Notes**

Internal Notes

**B** *I* U ⊠

Enter your internal notes here...

Client Advice

**B** *I* U ⊠

Enter client advice here...

**Outcome**

Status ▾

Lost To Agent ▾

Notes

**B** *I* U ⊠

Enter outcome notes here...

£ 200,000 ⬆

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**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.

## 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

ℹ 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...

iewings

ffers                          £ 200,000 ↑

🏠 Details

✅ Checklist

🏡 Appraisals

🛡 Compliance

ℹ 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

Turvey&Co

**Lost To Agent**

**Notes**

**B**  *I*  U  ⊠

Enter outcome notes here...

**Client Advice**

**B**  *I*  U  ⊠

Enter client advice here...

O

£ 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          🗑 Delete      💾 Save
   10:45 – 11:15