

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

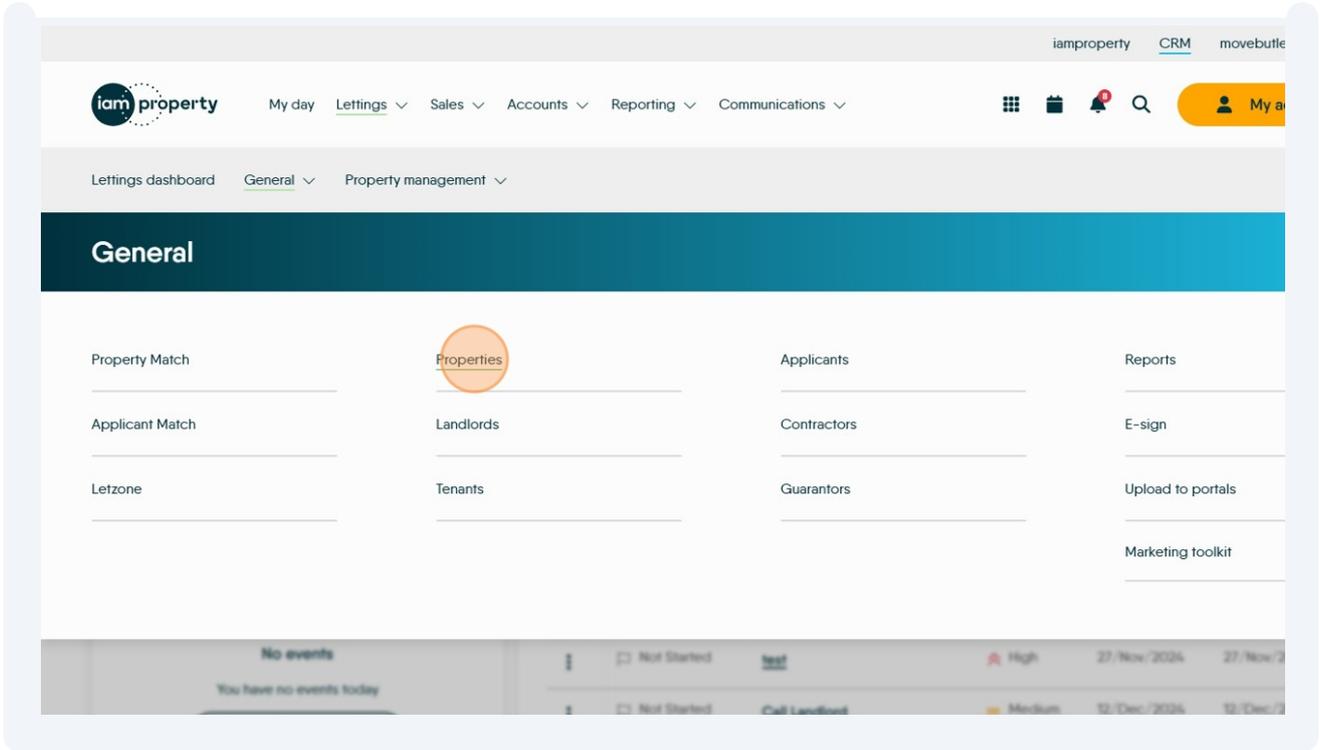
To find a property from the the list of Properties you have on CRM. Click "Lettings", then click "General", then click "Properties" this will take you to a list of your properties

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.

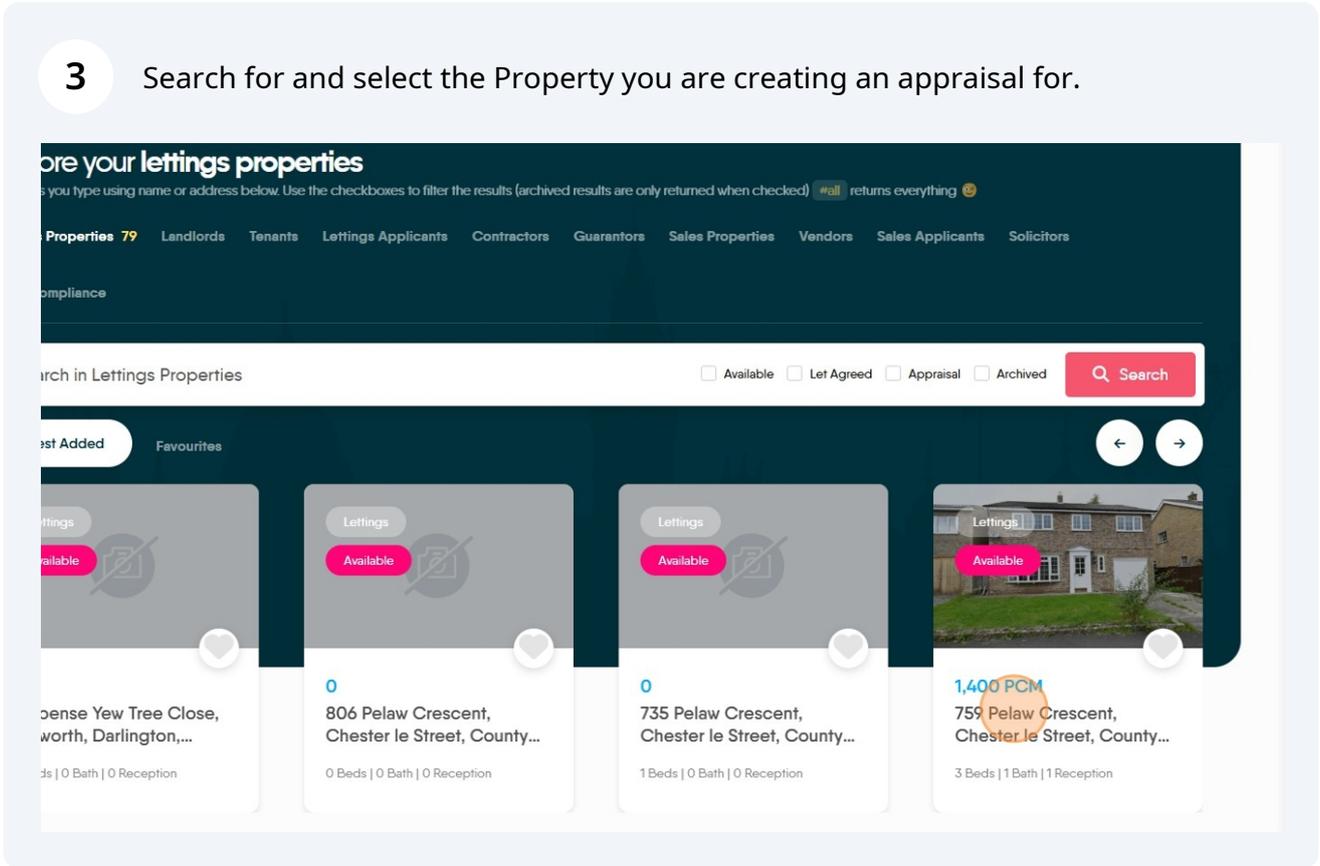
Status	Name	Priority	Start date	Due date
Not Started	<u>Call Landlord</u>	High	15/Nov/2024	15/Nov/2
Not Started	<u>test</u>	High	27/Nov/2024	27/Nov/2
Not Started	<u>Call Landlord</u>	Medium	12/Dec/2024	12/Dec/2

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 top navigation bar includes 'My day', 'Lettings', 'Sales', 'Accounts', 'Reporting', and 'Communications'. The left sidebar contains various menu items: 'Live Jobs', 'EPC Rating', 'Details', 'Checklist', 'Appraisals' (highlighted with an orange circle), 'Inspections', 'Accounts', 'Compliance', 'Information', 'maintenance', and 'Payment'. The main content area displays a property image of a two-story brick house. Below the image, there is a 'COMMERCIAL' section with a 'Commercial Unit' toggle and three options: 'Exempt', 'Inclusive', and 'Exclusive'. To the right, there is a 'Property Information' section with fields for 'Postcode' (DH2 2HX), 'Management Fee', 'Upfront Letting Fee', 'Regular Letting Fee', 'Authorised Expense Amount', 'Estimated Rental Value', and 'Agreement Name'.

5 Click "Add Appraisal"

The screenshot shows the iam property dashboard with a property listing for '759 Pelaw Crescent, Chester le Street, DH2 2HX'. The listing includes details such as 'Available', 'Lead landlord: Mr letting landlord34', and 'No tenants'. Below the listing, there are fields for 'Reference:', 'Negotiator: Training Dave', 'Branch: Morgan & Co', and 'status: Prospect'. A yellow button labeled '+ Add Appraisal' is highlighted with an orange circle. Below this, a message states 'No appraisals available' and 'Please click the button to add', with an 'Add New' button below it.

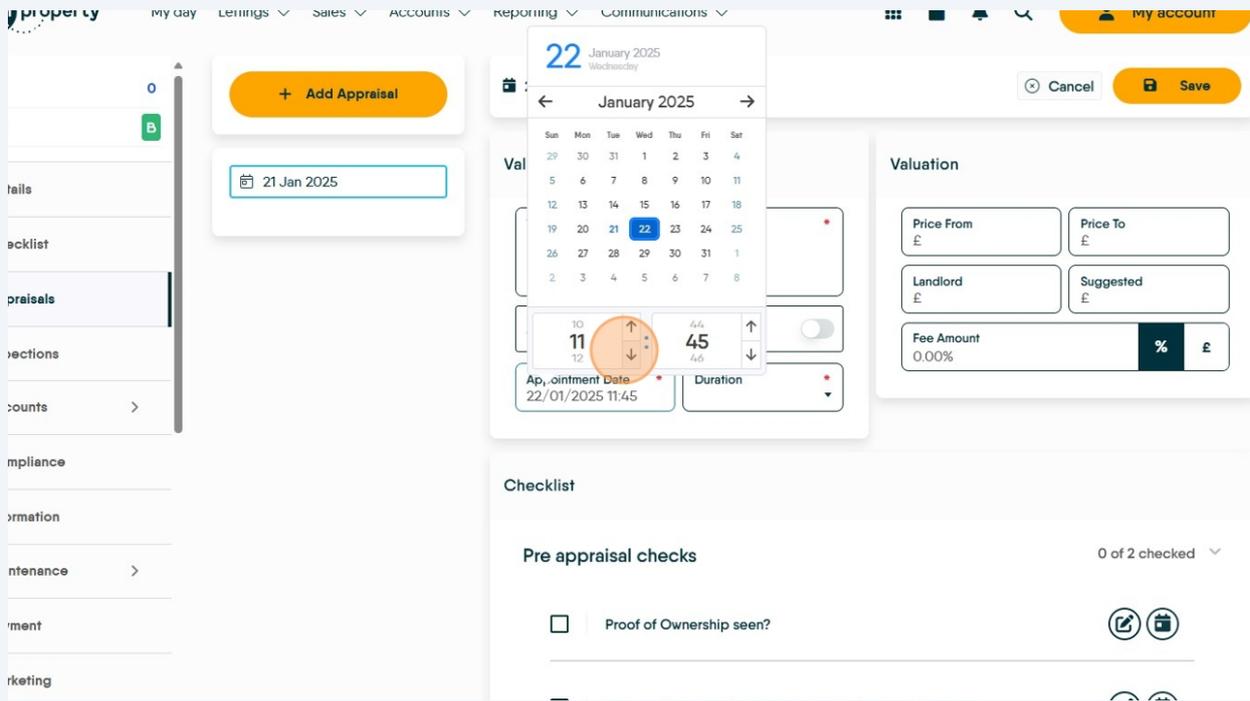
6

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

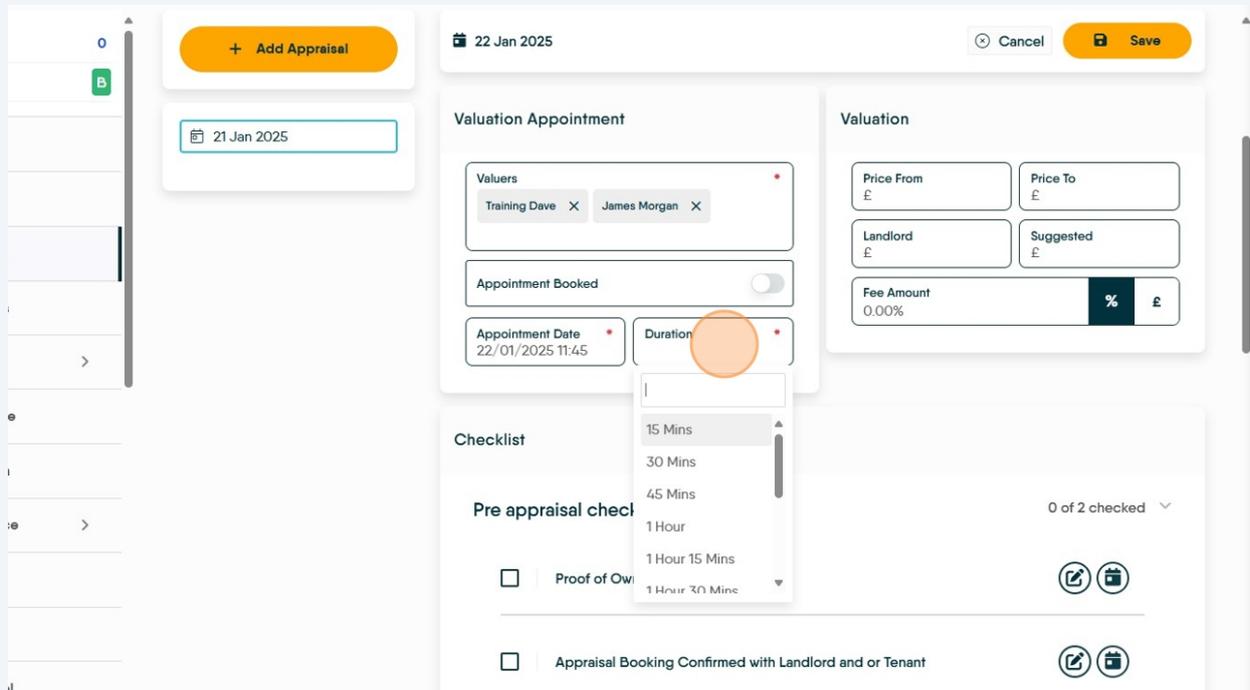
The screenshot shows the 'Add Appraisal' form in a web application. At the top right, there are links for 'iamproperty', 'CRM', 'movebutler', and 'iamsold'. The main header includes 'property' and navigation tabs: 'My day', 'Lettings', 'Sales', 'Accounts', 'Reporting', and 'Communications'. A search icon and a 'My account' button are also present. The form itself has a date field set to '21 Jan 2025' with 'Cancel' and 'Save' buttons. Below this is the 'Valuation Appointment' section, which includes a 'Valuers' field containing 'Training Dave' with a red 'x' to remove it, an 'Appointment Booked' toggle switch, and 'Appointment Date' and 'Duration' dropdown menus. To the right is the 'Valuation' section with fields for 'Price From', 'Price To', 'Landlord', 'Suggested', and 'Fee Amount' (0.00%). At the bottom is a 'Checklist' section titled 'Pre appraisal checks' with '0 of 2 checked'.

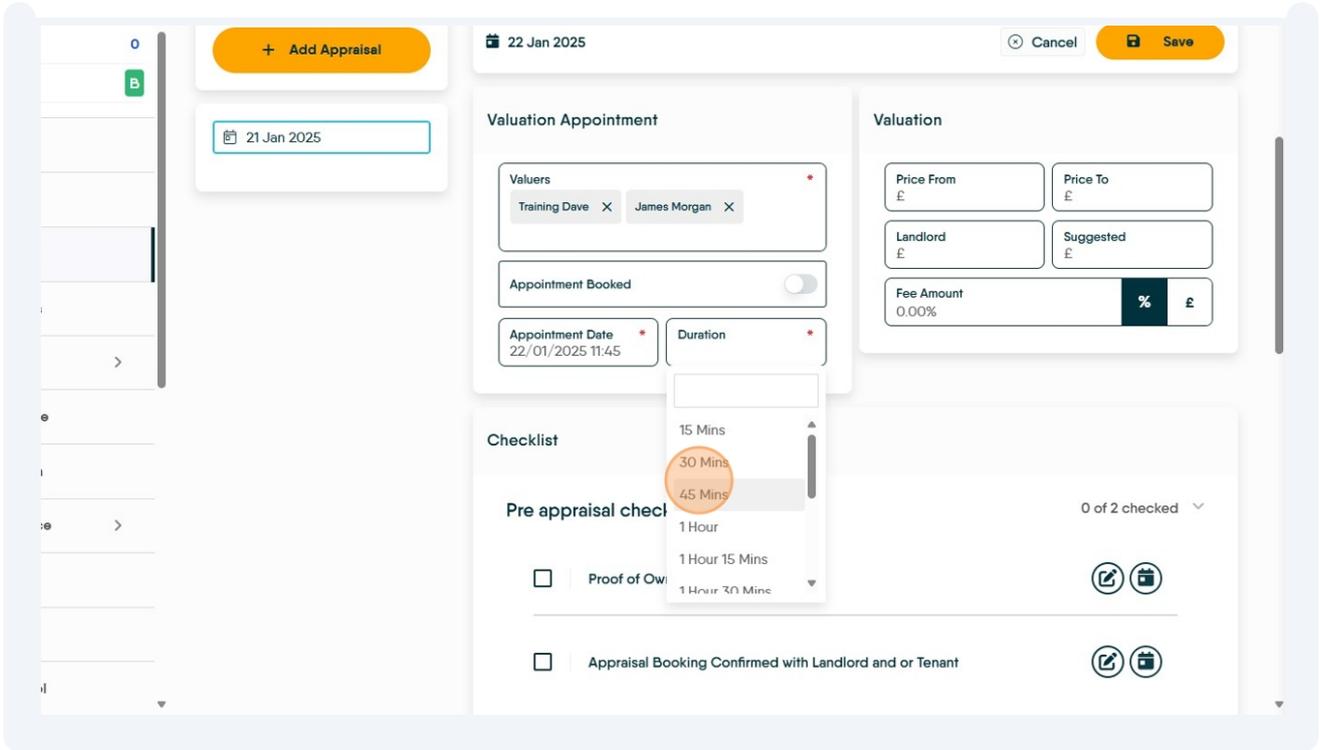
This screenshot shows the same 'Add Appraisal' form, but with 'James Morgan' added to the 'Valuers' field. The 'Appointment Date' dropdown menu is now open, and an orange circle highlights it. The 'Checklist' section is more visible, showing two items: 'Proof of Ownership seen?' and 'Appraisal Booking Confirmed with Landlord and or Tenant', both with checkboxes and edit/delete icons.

7 Click here to set the appointment date and time.



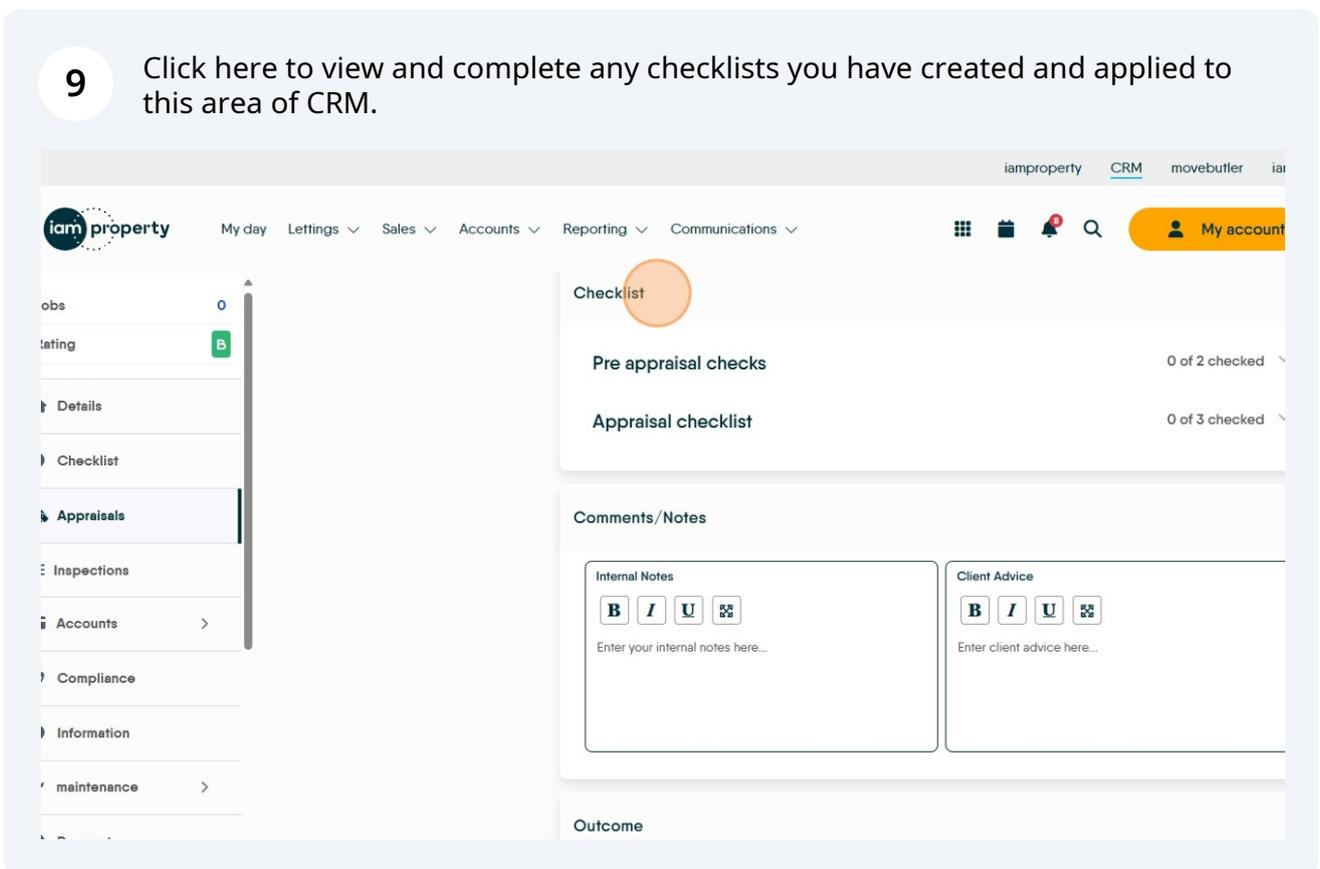
8 Click here to set the duration of the appointment. For example click "45 Mins"





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

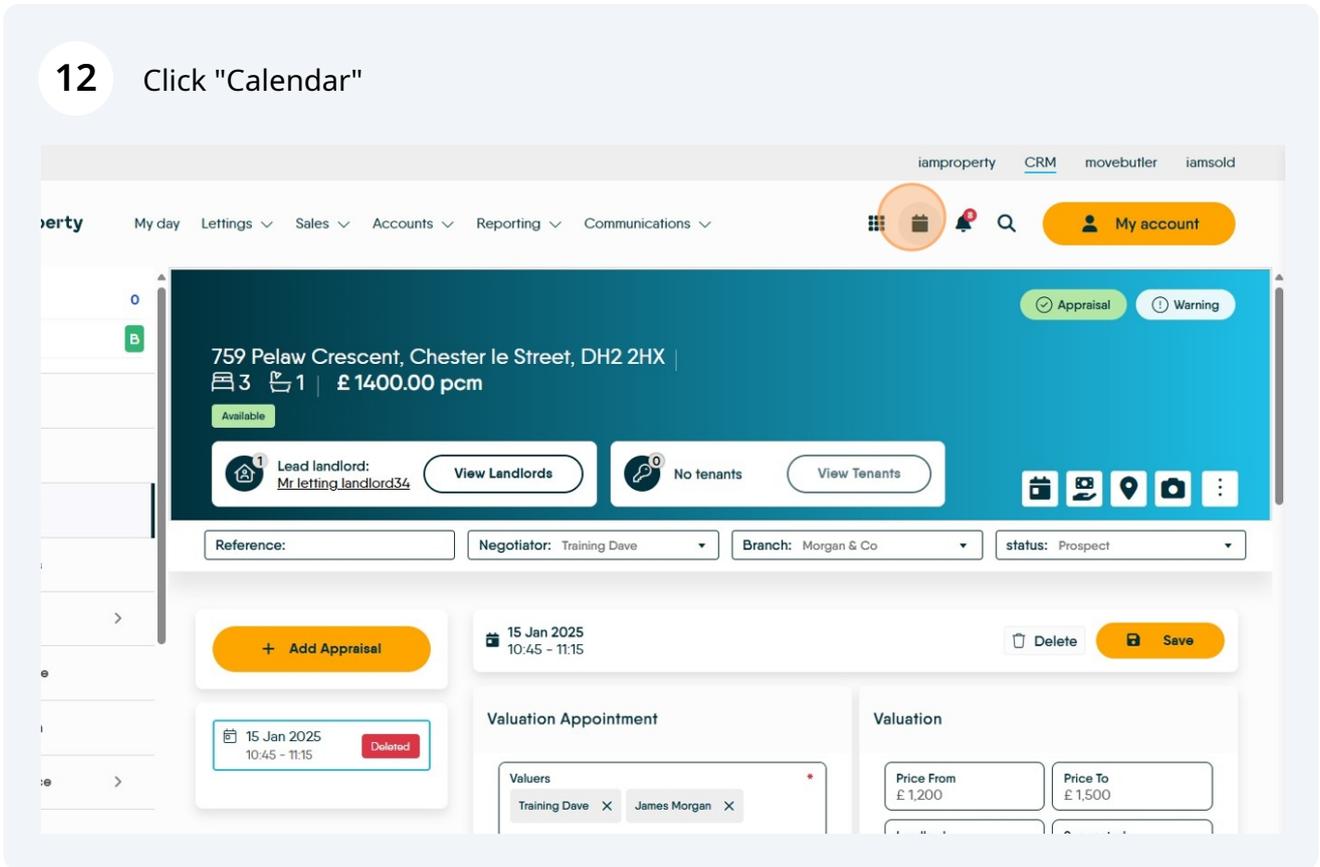
Price From Price To

Landlord Suggested

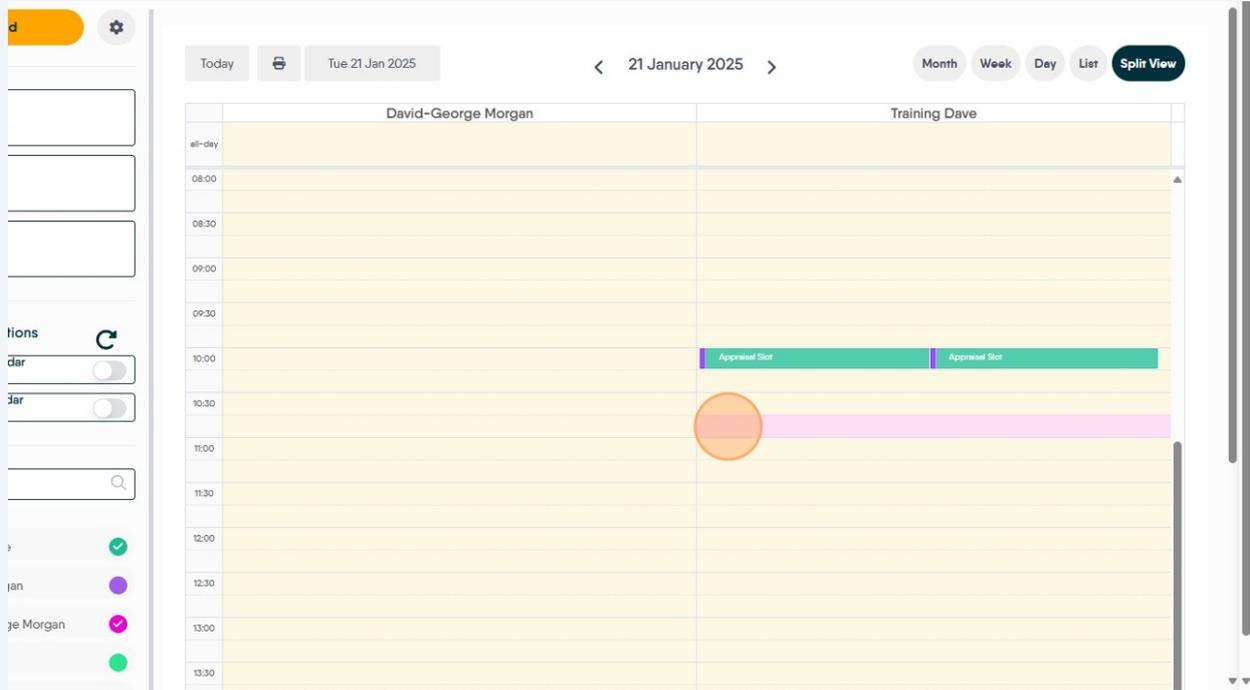
Fee Amount 0.00%

Creating an Appraisal Appointment in the Calendar

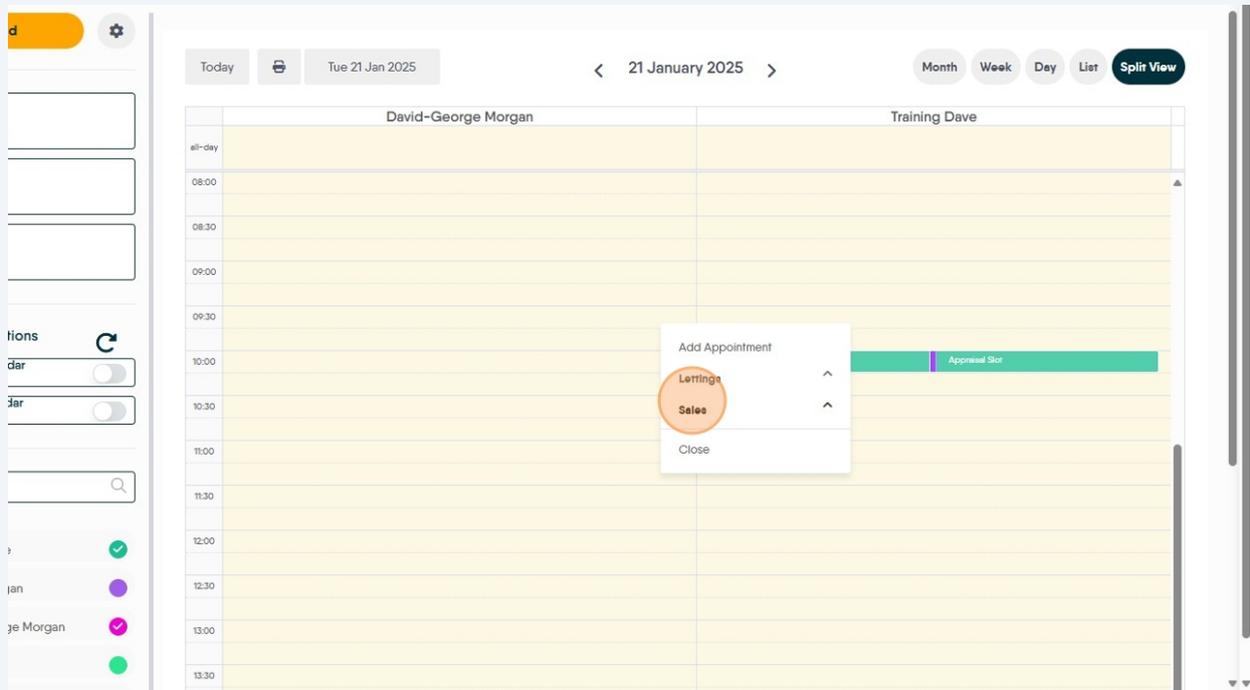
12 Click "Calendar"

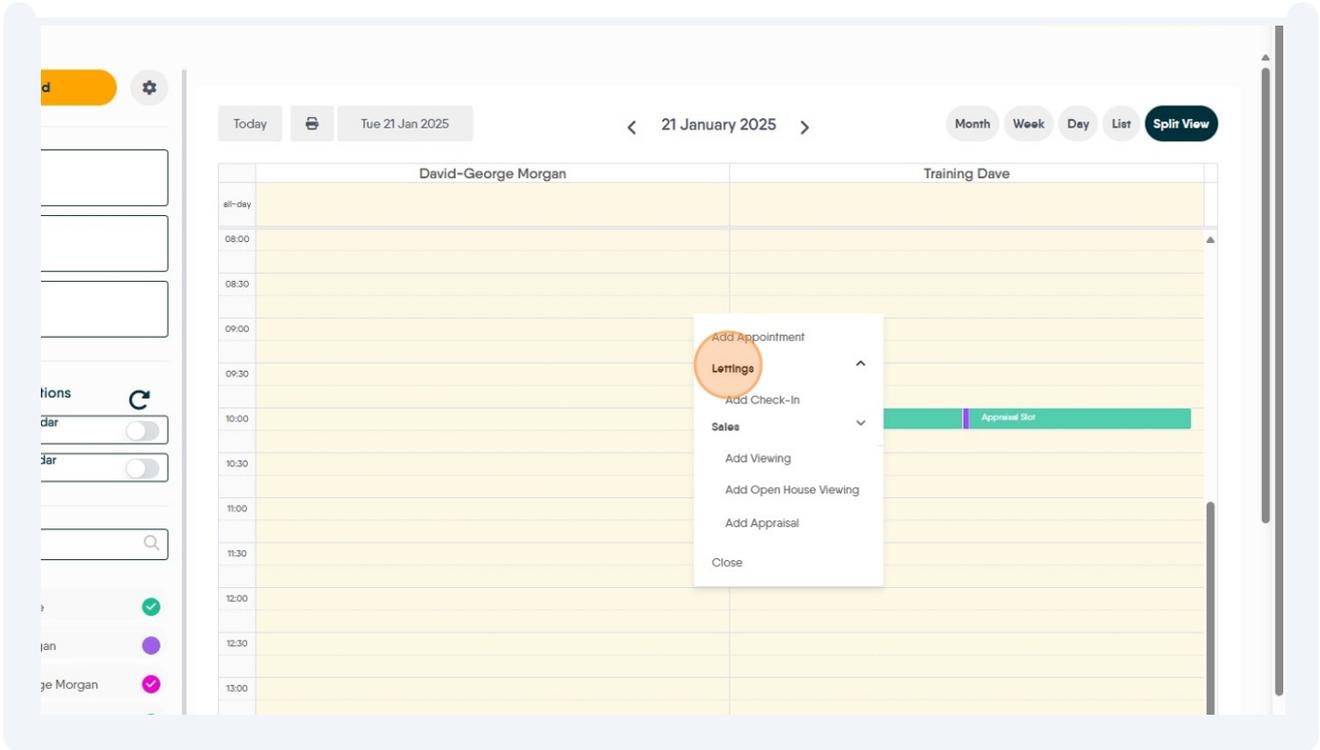


13 Find the date and time you are creating the appraisal for and right-click.



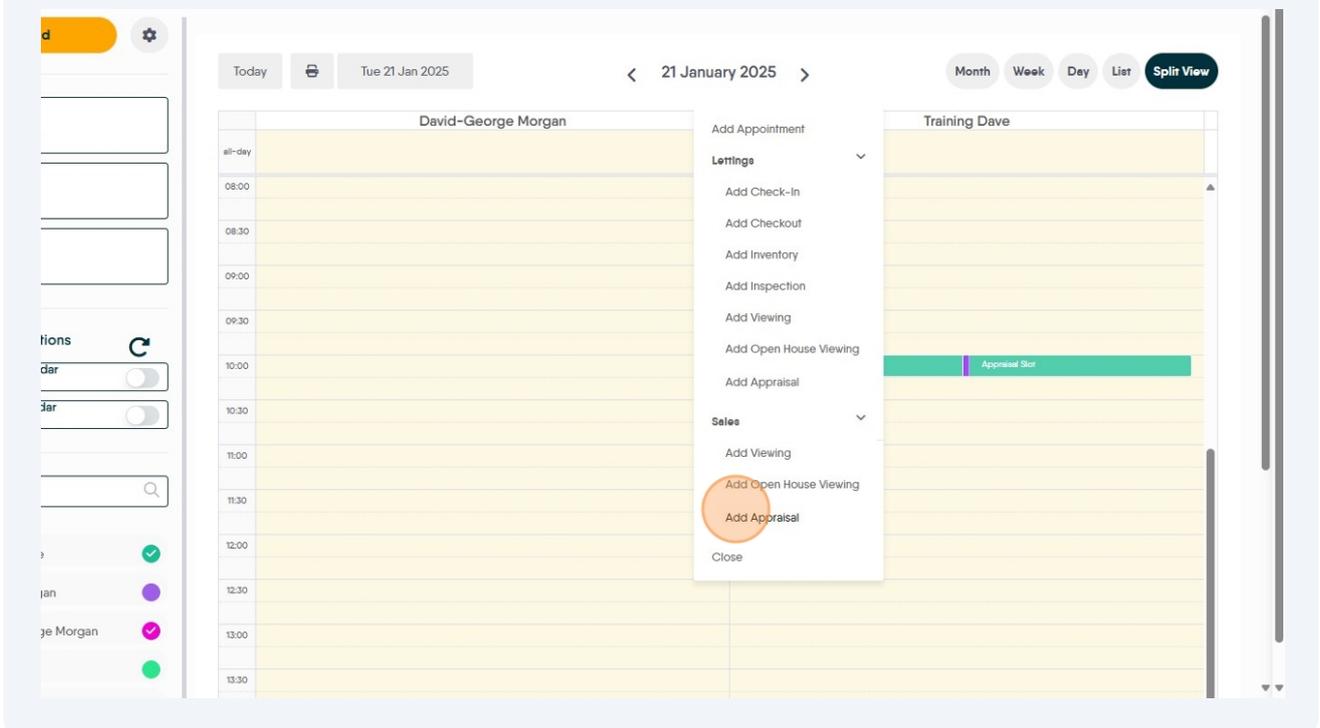
14 Click "Sales" or Click "Lettings"





15

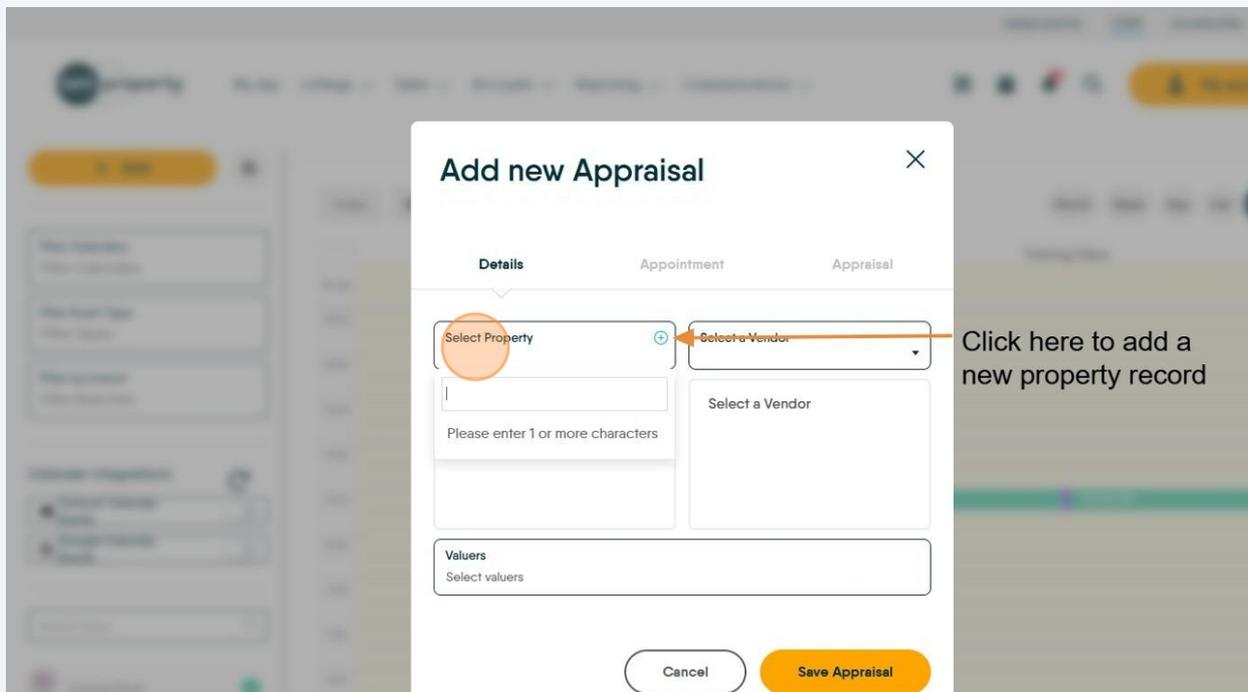
Click "Add Appraisal", as previously the process is the the same for Sales and Lettings



16

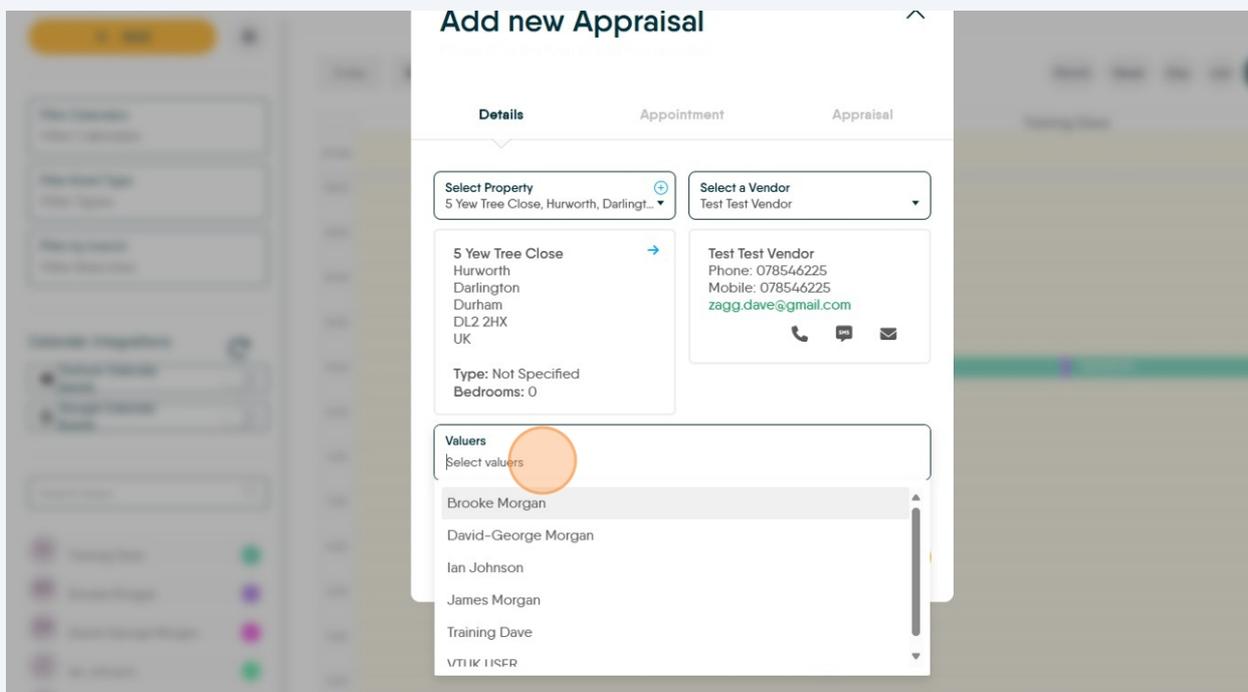
Click here and select the property. Clicking on the blue+ in the 'Select Property' field will allow you to add the basic details for a new property to the CRM.

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

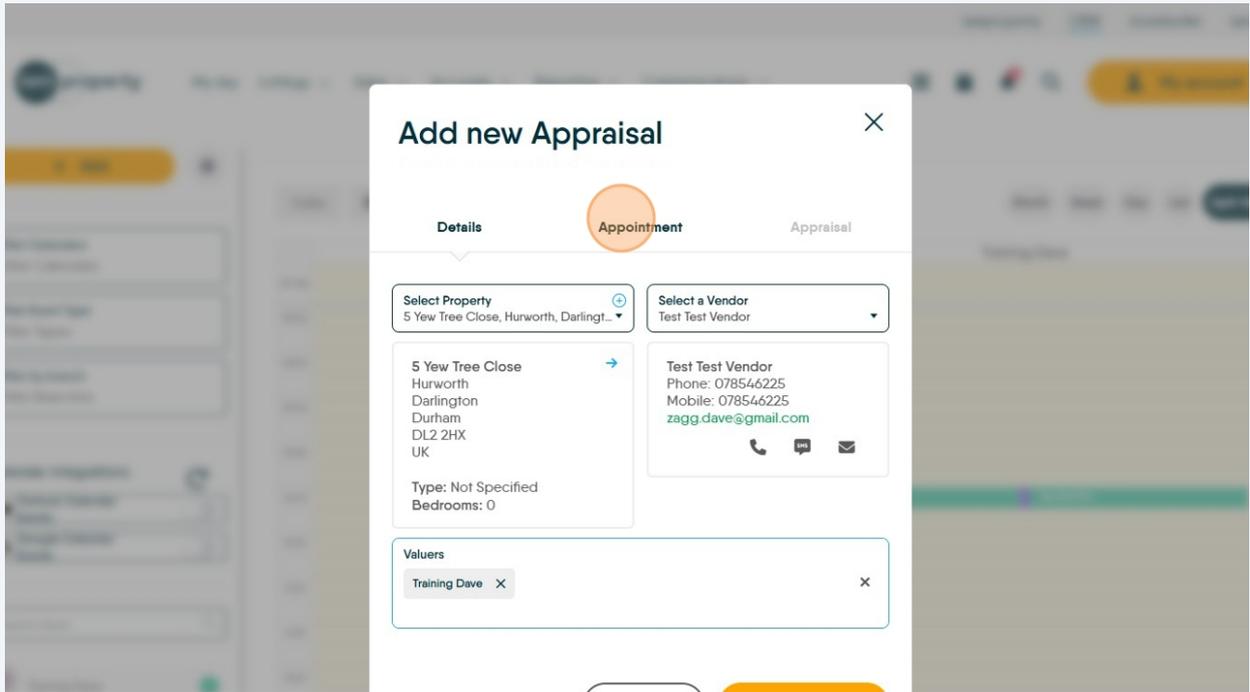


17

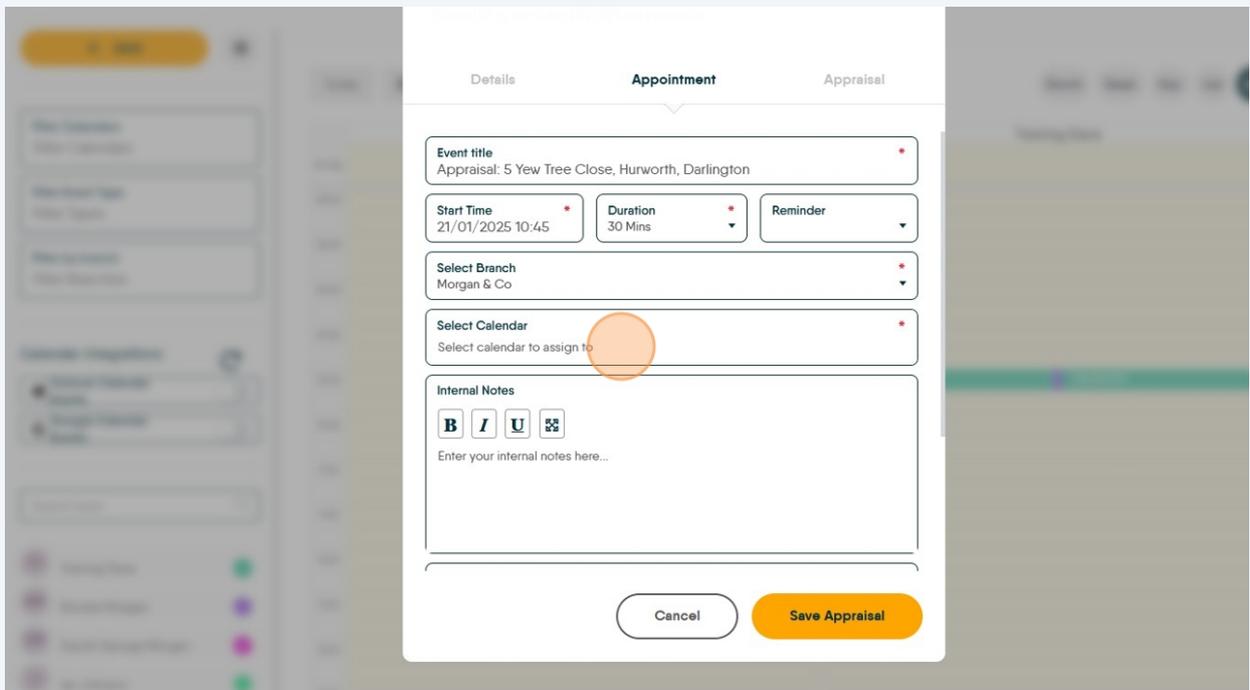
Click the "Select valuers" field and select the valuers you are using.

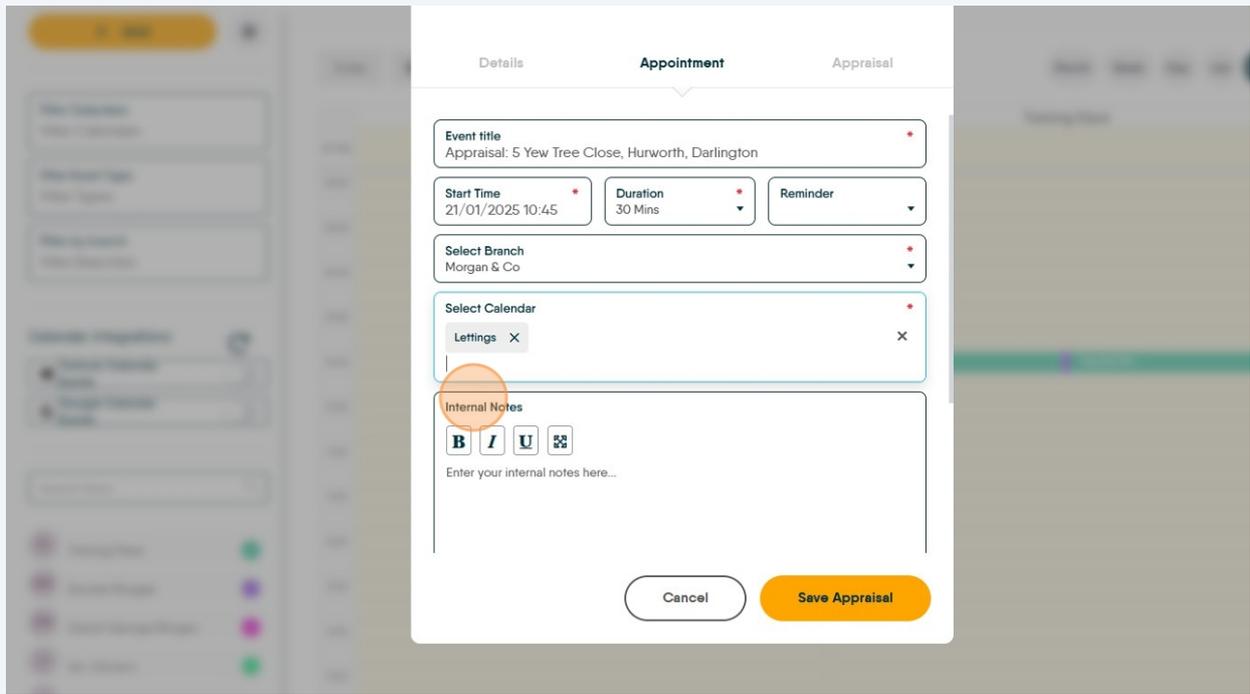


18 Click "Appointment"

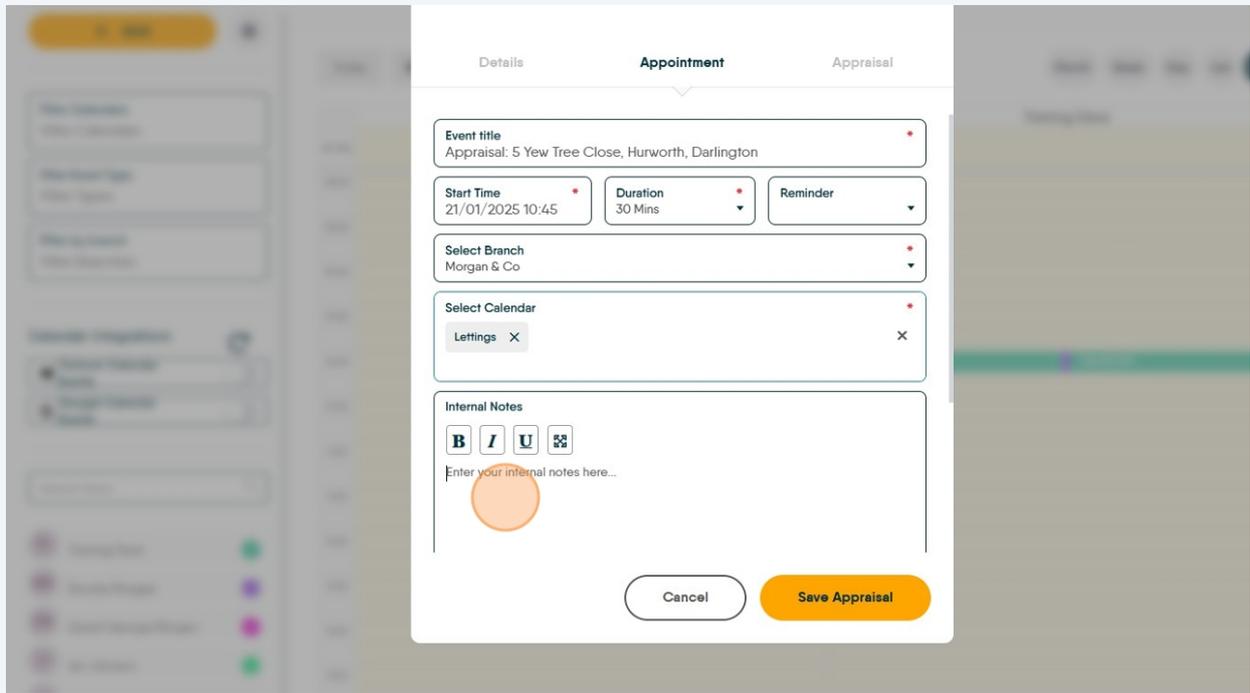


19 The Event Title is preset. Check the branch details are correct and then click the "Select calendar to assign to" field. Click Lettings or Sales (or the calendar you are using for your Appraisals) as required.





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.

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.

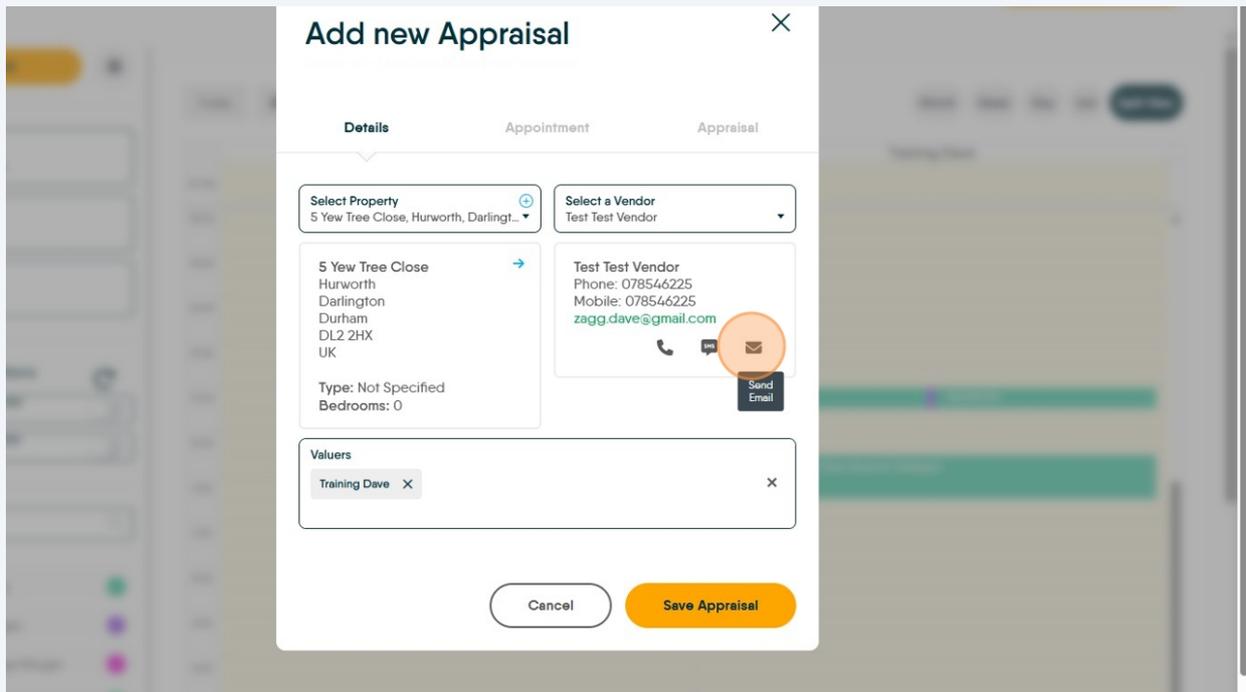
The screenshot displays a CRM calendar interface. On the left is a sidebar with a '+ Add' button and a list of event types, each with a plus sign: New Appointment, New Check-In, New Checkout, New Inventory, New Inspection, New Appraisal (Sales), New Appraisal (Lettings) (highlighted with an orange circle), 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 date picker for 'Tue 21 Jan 2025' and navigation options for 'Today', 'Month', 'Week', 'Day', and 'List'. The calendar grid has columns for 'David-George Morgan' and 'Training Dave'. Time slots are listed from 08:00 to 13:30. Two green event bars are visible: one for 'Appraisal Slot' at 10:00 and another for 'Appraisal: 5 Yew Tree Close, Hurworth, Darlington' at 11:00.

Sending Confirmation Emails/SMS

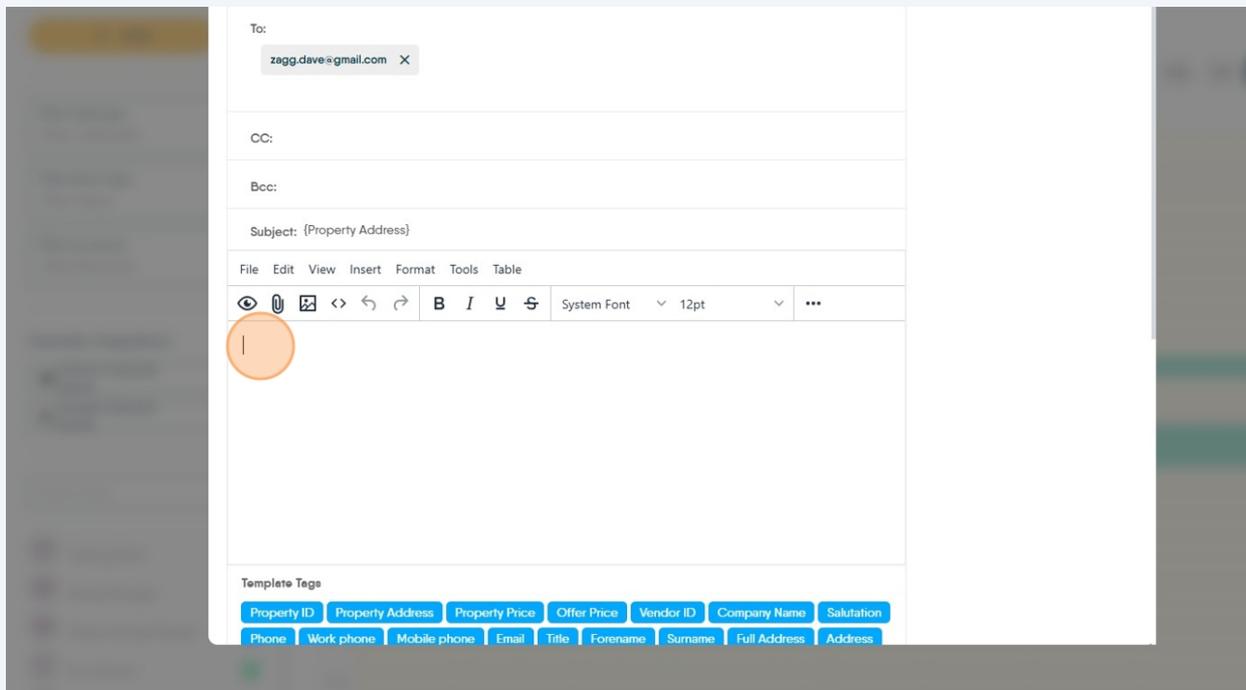


Alert! This process can be automated using CRM Automations, confirmations and reminders can be sent out at timescales to suit you with your wording. Ask Onboarding or your Account Manager.

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

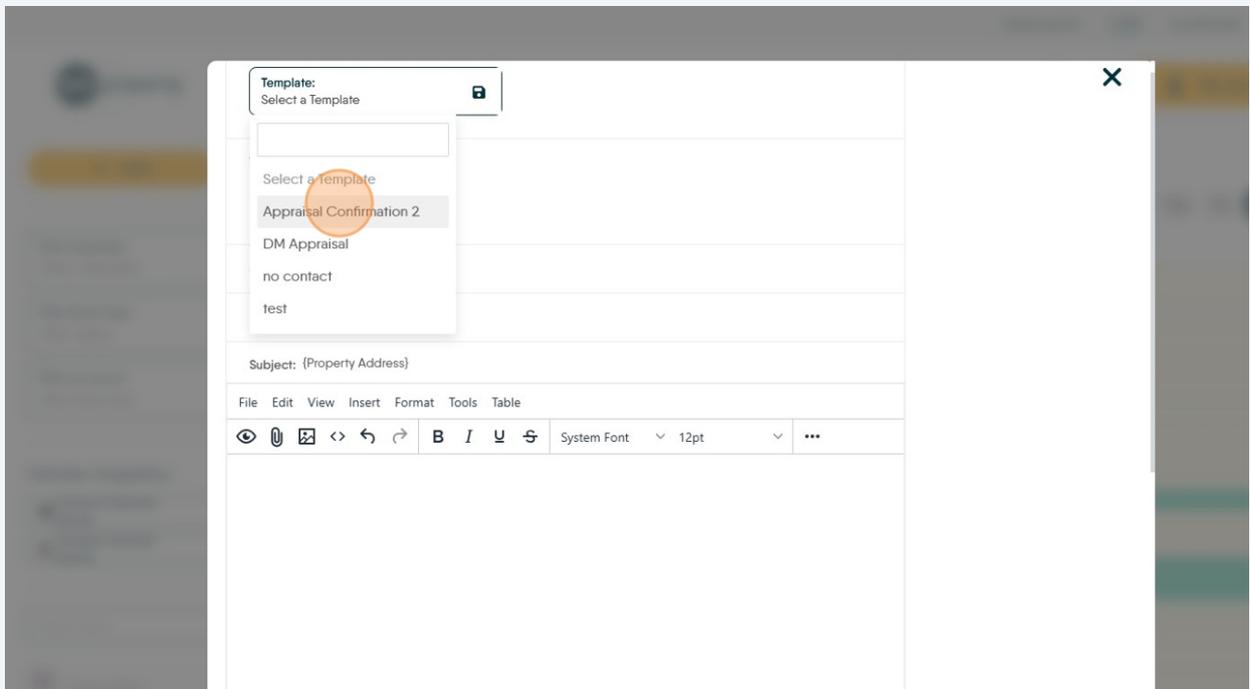
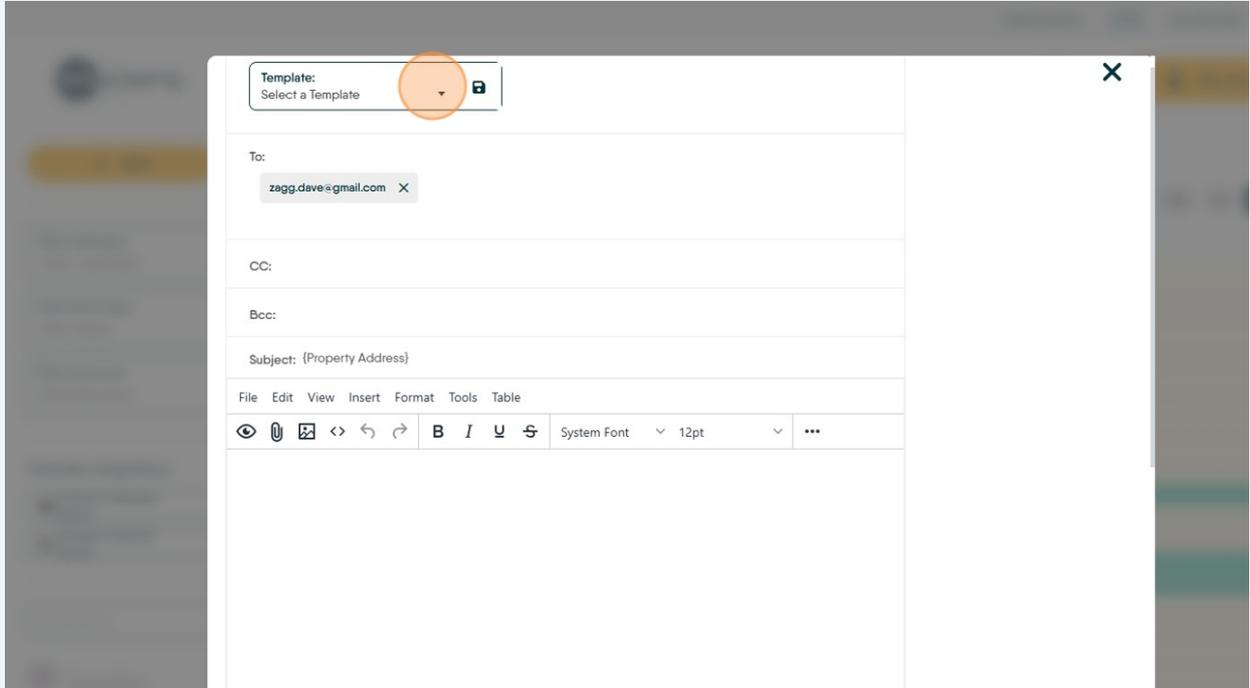


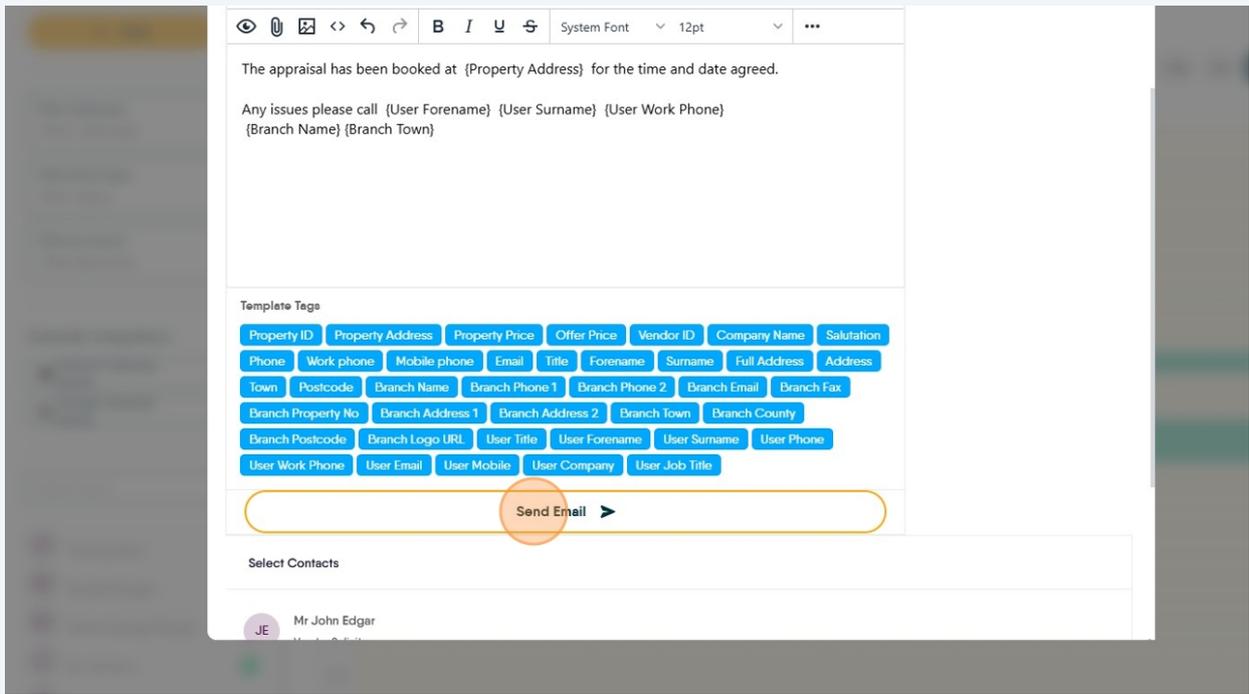
25 Click here. Either type your message or use the Template option to use a pre set template, or create a new template.



26 Click here to select a template.

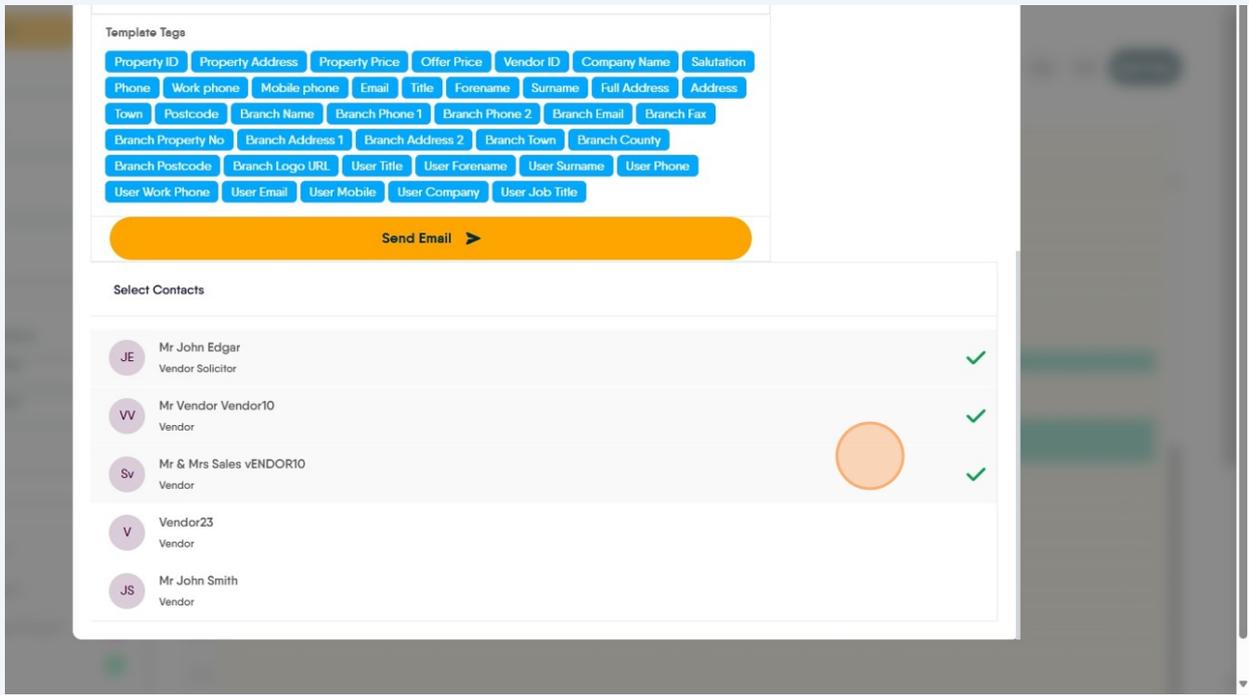
Templates are created by you, there are no default templates.
Click "Appraisal Confirmation 2"
Click "Send Email"





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

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 is titled 'Comments/Notes' and 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 toolbar is the placeholder text 'Enter your internal notes here...'. The right field is labeled 'Client Advice' and has the same toolbar and placeholder text 'Enter client advice here...'. The bottom section is titled 'Outcome' and contains two dropdown menus: 'Status' and 'Lost To Agent'. Below these is a text input field labeled 'Notes' with the same toolbar and 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

Notes

B *I* U

Enter outcome notes here...

Client Advice

B *I* U

Enter client advice 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