

# Updating the Property Rental Value in CRM



This guide provides step-by-step instructions on updating property rental values in your CRM, ensuring accurate listings and effective property management. By following these clear directions, you'll streamline your workflow and maintain up-to-date information, ultimately enhancing your service to clients.

1 Navigate to the property record you are updating the rental amount for.

iam property

My day Lettings Sales Accounts Reporting Communications

My account

Details Checklist Appraisals Inspections Accounts Compliance Information maintenance Payment Marketing

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 this property

Management Fee  
£ 0

Upfront Letting Fee  
£ 0

Regular Letting Fee  
£ 0

Authorised Expense Amount  
£ 0.00

Estimated Rental Value  
£ 0.00

Agreement Name

COMMERCIAL

Commercial Unit

Exempt  
Rent amount is

Inclusive  
Rent amount is

Exclusive  
Rent amount is

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## 2 Scroll down and click "Marketing"

The screenshot shows the 'iam property' dashboard. On the left, a vertical menu lists various functions: Compliance, Information, maintenance, Payment, Marketing (highlighted with an orange circle), Key Control, Media, Rooms, Portals, Viewings, and Offers. The main content area features a large image of a two-story brick house. To the right of the image, there's a 'Property Information' section with three status boxes: 'Fully managed' (checked), 'Rent collect', and 'Let only'. Below these are input fields for 'Management Fee', 'Upfront Letting Fee', and 'Regular Letting Fee', all set to '£ 0'. There are also fields for 'Authorised Expense Amount' (£ 0.00) and 'Estimated Rental Value' (£ 0.00). At the bottom, there's a 'COMMERCIAL' section with a 'Commercial Unit' toggle switch.

## 3 Click the 'Rent' field and edit to the desired amount.

This screenshot shows the 'Property Marketing' section of the dashboard. The top header displays the property address '7278 Pelaw Crescent, Chester le Street, DH2 2HX' and the current rent 'GBP 600.00 pcm'. Below this, there are buttons for 'View Landlords' and 'View Tenants'. The 'Property Marketing' section contains five input fields: 'Rent (GBP)' (set to 600.00, highlighted with an orange circle), 'Deposit (GBP)' (set to 200.00), 'Bedrooms' (set to 3), 'Bathrooms' (set to 1), and 'Reception' (set to 1). Each field has a circular icon above the value and up/down arrows for editing. The 'Reference' field is empty, and the 'Negotiator' is set to 'Training Dave'. The 'Branch' is 'Morgan & Co' and the 'Status' is 'Prospect'. The 'Currency' is set to 'GBP'.

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Click here to save. The amount will update at the top of the screen (as highlighted)

The screenshot displays a property management software interface. At the top, the property address is 7278 Pelaw Crescent, Chester le Street, DH2 2HX. The rent is highlighted as GBP 820. Below the address, there are buttons for 'View Landlords' and 'View Tenants'. The 'Lead landlord' is Mrs Pamela Gre... and the 'Lead tenant' is Lettings Applicant1... The interface also shows a 'Reference' field, a 'Negotiator' dropdown (Training Dave), a 'Branch' dropdown (Morgan & Co), and a 'Status' dropdown (Prospect). The 'Property Marketing' section includes a 'Currency' dropdown (GBP) and five input fields: Rent (GBP) with a value of 820.00, Deposit (GBP) with a value of 200.00, Bedrooms with a value of 3, Bathrooms with a value of 1, and Receptions with a value of 1. The 'Property Advertising' section is partially visible at the bottom, with a 'Save Changes' button highlighted by an orange circle.

| Property Marketing |
|--------------------|
| Rent (GBP)         |
| 820.00             |
| Deposit (GBP)      |
| 200.00             |
| Bedrooms           |
| 3                  |
| Bathrooms          |
| 1                  |
| Receptions         |
| 1                  |

Property Advertising

Save Changes