

Using CRM Property/Applicant Matching



This guide provides a step-by-step process for efficiently matching applicants to property listings and properties to applicants.

By following the outlined steps, users can effectively use the CRM Matching tool. This guide shows how to correctly setup the options used to match properties and applicants. How to filter applicants/properties based on specific criteria such as location, property type, and amenities.



There are 2 ways to match, Applicant to Property and Property to Applicant. The following steps will cover both of these in individual sections. There are also some basic rules that need to be followed for matching to work correctly.

CRM attempts an exact match property to applicant and applicant to property. This means that options selected in the 'Matching Property' section of the Property record need to be the same as those selected in the 'Applicant Criteria' section of the Applicant record.

In the Applicant record, for 'property types' there is an option of 'Not Specified' which allows a broad match against all property types. However, the other options need to match, e.g. if the property has 'garden' selected and the applicant doesn't have garden selected then the applicant and property will not match.

Mandatory Settings for Matching to Work

1

The following steps for Applicants and Properties need to be set correctly for the matching to work. If your matching is not working as you expect, please check these first. Incorrect GDPR is the most common setting.

2

For Applicant Records

3

Click **"Set GDPR"**. Click **"Allow Marketing"** this must be allowed for matching to work

iamproperty CRM movebutler iamsold

property My day Lettings Sales Accounts Reporting Communications My account

£0.00

DM David Morgan david.morgan4@iamproperty.com 07852223210

Warning Set GDPR

7682 Pelaw Crescent, Chester le Street, County Durham Lettings

reference: Negotiator: Training Dave Branch: Morgan & Co Status: Active

Personal Information

Title: Mr	Forename: David	Surname: Morgan	Company Name:
Website:	Phone Number: 07852223210	Work phone:	Mobile phone: 07852223210
Email Address: david.morgan4@iamproper	Salutation: Mr Morgan	Source: Friend	Temperature: Warm

Applicant Address [Edit Manually](#)

Contact Preferences

Do not contact this user

Email <input checked="" type="checkbox"/>	Letter <input checked="" type="checkbox"/>
SMS <input checked="" type="checkbox"/>	Phone <input checked="" type="checkbox"/>
Allow Third Party <input type="checkbox"/>	Allow Marketing <input checked="" type="checkbox"/>
Select Agent: Training Dave	Date Checked: 21/07/2025

[Cancel](#) [Save](#)

4

Click "**Status**" this must be **Active**, or any other setting (e.g. a personal setting created by yourself) that is **NOT Archived or Inactive**.

The property record must also not be archived.

The screenshot shows a software interface with a navigation bar at the top containing 'Reporting', 'Communications', and 'My account'. Below this is a blue header area with 'AP', 'Warning', and 'Set GDPR' buttons. The main content area features a 'Lettings' button and a dropdown menu for 'Status' which is currently set to 'Active'. Other dropdowns for 'Proprietor: Training Dave' and 'Branch: Morgan & Co' are visible. Below the dropdowns are input fields for 'Name', 'Surname: Morgan', 'Company Name', 'Phone Number', 'Work phone', and 'Mobile phone'.

5

For Property Records

6 Click "Status" this must be **Live** and the property must not be **archived**

The screenshot shows a property management software interface. At the top, there is a blue header with the property address "nt, Chester le Street, DH2 2HX |" and "0.00 pcm". Below the header, there are several buttons: "View Landlords", "Lead tenant:" (with a key icon and a notification bubble), and "View Tenants". To the right of these buttons are five icons: a calendar, a document, a location pin, a camera, and a vertical ellipsis. Below the header, there are three dropdown menus: "Negotiator: Training Dave", "Branch: Morgan & Co", and "Status: Live". The "Status" dropdown is highlighted with an orange border. Below the dropdowns, there is a section for "Property Address" with an "Upload" button and an "Edit Address" button. A "Postcode" field contains "DH2 2HX". Below the address section, there is a "Property Information" section.

Optional Settings for Matching to Work correctly



Alert! There has recently (February 2026) been an update to CRM Matching which causes the match to be initially made on the Minimum and Maximum Price, Bedrooms and Match Area. This has been made to allow for a wider initial match and therefore more properties/applicants to match together. To use the additional filters, as discussed below, click onto the 'Use additional Filters' option

The screenshot shows four filter input fields stacked vertically. The first field is labeled 'Minimum Price' with a value of '£ 0'. The second field is labeled 'Maximum Price' with a value of '£ 2,100,000'. The third field is labeled 'Minimum Bedrooms' with a value of '0'. The fourth field is labeled 'Match Areas' and has a toggle switch that is currently turned on. Below these fields is a link labeled 'Use additional filters' which is underlined in green.

7

The majority of these optional items in the **Property Matching** and **Applicant Criteria** screens of the property and applicant records are set up in the Lookups section of the configuration menu. For help with this please speak to Onboarding or Customer Support (crm.support@iamproperty.com)

If the settings options shown below are not setup fully and (if setup) used, matching will still work. However, the matches will be to the basic details of house type, price, bedrooms etc. Any matches made will not be accurate to every wish the customer has, however will give more matches.



All the options shown below are common across Sales and Letting Properties and Applicants. Obviously Lettings have a regular rental to pay and Sales is purchase price, otherwise the options are the same.

Property

8

In the **"Property Record"** When creating the Property record the more **"Property Attributes"** that are selected the more accurate the match to applicants will be. However, this also means the there may be less matches to applicants and you need to remember to add the requirements to the Applicant Record.

The "Property Attributes, ...Age, ...Style" and "Other Criteria" options in the Matching Property section are 'Lookups' and can be edited and added to, when an option is added to one of these sections it is reflected in the Applicant record.

The absolute minimum for this screen is 'Lease Period', 'Min Lease Months', 'Max Lease Months' and 'Property Type'. The more options selected the more accurate the match is.

The screenshot displays the 'Matching Property' interface. At the top, there are three input fields: 'Lease Period' (Monthly), 'Min Lease Months' (6), and 'Max Lease Months' (12). Below these are two dropdown menus for 'Property Type', one showing 'Semi-Detached House' and the other 'Semi Detached'. The main area is divided into four sections, each with a list of attributes and toggle switches:

- Property Attributes:** Pets Allowed (off), Furnished (off), Part Furnished (off), Unfurnished (on).
- Property Age:** Period (off), Pre-war (off), Post-war (off), Modern (on), New-build (off).
- Property Style:** Art Deco (off), Airey (off), 70's (off), New Build (off), 90's (off).
- Other Criteria:** Potential Vendor (off).

A yellow box highlights the 'Property Attributes', 'Property Age', and 'Property Style' sections. A yellow circle with a lock icon is located in the bottom right corner of the form.

9

To set the option scroll through and click the toggle to turn on (shows BLACK when enabled). Once completed click **"Save"**.

The screenshot shows a 'matching property' interface with several filter sections:

- Lease Period:** Monthly
- Min Lease Months:** 6
- Max Lease Months:** 12
- Property Type:** Semi-Detached House
- Property Type Zoopla:** Semi Detached
- Property Attributes:**
 - Pets Allowed:
 - Furnished:
 - Part Furnished: (highlighted with an orange circle)
 - Unfurnished:
 - Single Garage:
- Property Age:**
 - Period:
 - Pre-war:
 - Post-war:
 - Modern:
 - New-build:
- Property Style:**
 - 30's Semi:
 - Addison Homes:
 - Georgian:
 - Victorian:
 - Tudor:
- Other Criteria:**
 - Potential Vendor:

Applicant



No prospective purchaser or tenant has no budget in mind or any idea of how many bedrooms and bathrooms they would need as a minimum. Make sure you add this information to an Applicant record.

If a lettings applicant is looking for a 0 bed 0 Bathroom property with £0 - £0 rent you will not get any/much responses in a match when all your properties are advertised with a rental value attached (similar for sales).

10

"Applicant Criteria" This is where you set the property features that an applicant is looking for in their new property.

Setting these allows you to create a very accurate match to the property records that are in your CRM.

The options shown in "Property Attributes, ...Age, ...Style" and "Other Criteria" options in the 'Applicant Criteria' section are a copy of those in the property record 'Lookups' and can be edited and added to, when an option is added to one of these sections it is reflected in the Applicant record.

Applicant Criteria

Search for Area... Miles 1/4 Mile Add Area

Min Price £0.00 Max Price £0.00 Minimum Bedrooms - 0 + Minimum Bathrooms - 0 +

Move In Date 21/07/2025

Property Attributes

- Pets Allowed
- Furnished
- Part Furnished
- Unfurnished
- Single Garage

Property Type

Search Property Type

- Apartment
- Bar/Nightclub
- Barn
- Barn Conversion

Property Age

Search Property Age

Property Style

Search Property Style

11 Click the "Search for Area..." field.

The screenshot shows the 'Applicant Criteria' form. The 'Search for Area...' field is highlighted with an orange border. To its right is a 'Miles' dropdown menu set to '1/4 Mile' and an 'Add Area' button with a location pin icon. Below these are input fields for 'Min Price' (£0.00) and 'Max Price' (£0.00), and numeric controls for 'Minimum Bedrooms' (0) and 'Minimum Bathrooms' (0). A 'Move In Date' field is set to '21/07/2025'. The 'Property Attributes' section includes toggle switches for 'Pets Allowed', 'Furnished', 'Part Furnished', 'Unfurnished', and 'Single Garage'. The 'Property Type' section includes a search bar and toggle switches for 'Apartment', 'Bar/Nightclub', 'Barn', and 'Barn Conversion'. A 'Property Age' and 'Property Style' section is partially visible at the bottom.

12 In the 'Search for Area' field add the area the applicant is looking for. This can be a town, postcode, street or even a school they would like to be close to.

The screenshot shows the 'Applicant Criteria' form with the 'Search for Area' dropdown menu open. The dropdown list is highlighted with an orange border and contains the following items: 'chester', 'Chester UK', 'Chester Zoo Chester, UK', 'Chester-le-Street UK', 'Chester Racecourse Chester, UK', and 'Chester Service Area M56 Junction 14, Chester, UK'. The 'powered by Google' logo is visible at the bottom of the dropdown. The rest of the form, including the 'Miles' dropdown, price fields, and property attribute sections, is visible in the background.

13

Then select the radius/distance from the edge of the area that the customer is looking at, from a quarter of a mile to 40 miles. **N.B. the 'radius' around the center point (town, postcode, street etc) is not circular, it is square.**

N.B. If you are using a postcode or a street name, then a quarter or even half a mile is not much of an area to search.

The screenshot shows the 'Applicant Criteria' form in the iamproperty CRM. The form includes a search bar with 'Chester-le-Street, UK' and a 'Miles' dropdown menu set to '3 Miles'. Below this are fields for 'Min Price' and 'Max Price', both set to '£ 0.00', and 'Minimum Bedrooms' and 'Minimum Bathrooms' set to '0'. A 'Move In Date' field is set to '21/07/2025'. The 'Property Attributes' section has toggle switches for 'Pets Allowed', 'Furnished', 'Part Furnished', 'Unfurnished', and 'Single Garage'. The 'Property Type' section has a search bar and toggle switches for 'Apartment', 'Bar/Nightclub', 'Barn', and 'Barn Conversion'. The 'Add Area' button is visible to the right of the 'Miles' dropdown.

14

Click "Add Area"

The screenshot shows the 'Applicant Criteria' form in the iamproperty CRM. The 'Add Area' button is highlighted with an orange circle. The form includes a search bar with 'Chester-le-Street, UK' and a 'Miles' dropdown menu set to '3 Miles'. Below this are fields for 'Min Price' and 'Max Price', both set to '£ 0.00', and 'Minimum Bedrooms' and 'Minimum Bathrooms' set to '0'. A 'Move In Date' field is set to '21/07/2025'. The 'Property Attributes' section has toggle switches for 'Pets Allowed', 'Furnished', 'Part Furnished', 'Unfurnished', and 'Single Garage'. The 'Property Type' section has a search bar and toggle switches for 'Apartment', 'Bar/Nightclub', 'Barn', and 'Barn Conversion'.

15

You can add multiple areas to use in the match. Repeat the process shown previously.

The screenshot shows the 'Applicant Criteria' page in the iam property system. The left sidebar contains navigation options: Offer, Status, Offer Temp., Contacted, Details, Checklist, Viewings, Offers, Linked Applicants, Contacts, and Documents. The main content area is titled 'Applicant Criteria' and includes a search bar for areas, a 'Miles' dropdown, and an 'Add Area' button. A single area, 'Chester-le-Street, UK - 3 Miles', is selected and highlighted with a blue box. Below this, there are input fields for 'Min Price' (£0.00) and 'Max Price' (£0.00), and dropdowns for 'Minimum Bedrooms' (0) and 'Minimum Bathrooms' (0). A 'Move In Date' field is set to '21/07/2025'. The 'Property Attributes' section has toggle switches for 'Pets Allowed', 'Furnished', 'Part Furnished', 'Unfurnished', and 'Single Garage'. The 'Property Type' section has a search bar and toggle switches for 'Apartment', 'Bar/Nightclub', 'Barn', and 'Barn Conversion'.

The screenshot shows the 'Applicant Criteria' page in the iam property system, similar to the first screenshot but with two areas selected. The 'Add Area' button is now disabled. The selected areas are 'Chester-le-Street, UK - 3 Miles' and 'Hurworth-on-Tees, Darlington DL2 2HX, UK - 1 Mile', both highlighted with blue boxes. The 'Min Price' is now £1,000 and the 'Max Price' is £1,500. The 'Minimum Bedrooms' dropdown is set to 2 and 'Minimum Bathrooms' is set to 1. The 'Move In Date' remains '21/07/2025'. The 'Property Attributes' and 'Property Type' sections are identical to the first screenshot.

16

Add the **Minimum and Maximum price** the applicant is looking for. Add the minimum number of Bedrooms and Bathrooms they are looking for as well.

As previously mentioned, no applicant has no budget or any idea what the minimum number of bathrooms they need, if they cant give you a number use 1 for both bed and bath.

× Chester-le-Street, UK - 3 Miles × Hurworth-on-Tees, Darlington DL2 2HX, UK - 1 Mile

Min Price £1,000 Max Price £1,500 Minimum Bedrooms - 2 + Minimum Bathrooms - 1 +

Move In Date
21/07/2025

Property Attributes

Pets Allowed

Furnished

Part Furnished

Unfurnished

Single Garage

Property Type

Search Property Type

Apartment

Ber/Nightclub

Barn

Barn Conversion

Property Age

Property Style

17

Click here and start to add the features the applicant is looking for in their new property, you can select multiple options from each section. The options selected will initially not affect the match.

× Chester-le-Street, UK - 3 Miles × Hurworth-on-Tees, Darlington DL2 2HX, UK - 1 Mile

Min Price £1,000 Max Price £1,500 Minimum Bedrooms - 2 + Minimum Bathrooms - 1 +

Move In Date
21/07/2025

Property Attributes

Pets Allowed

Furnished

Part Furnished

Unfurnished

Single Garage

Property Type

Search Property Type

Apartment

Ber/Nightclub

Barn

Barn Conversion

Property Age

Property Style

Property Age	Property Style
<input type="text" value="Search Property Age"/>	<input type="text" value="Search Property Style"/>
Period <input type="checkbox"/>	30's Semi <input type="checkbox"/>
Pre-war <input type="checkbox"/>	Addison Homes <input type="checkbox"/>
Post-war <input type="checkbox"/>	Georgian <input type="checkbox"/>
Modern <input type="checkbox"/>	Victorian <input type="checkbox"/>
Other Criteria	
Potential Vendor <input type="checkbox"/>	



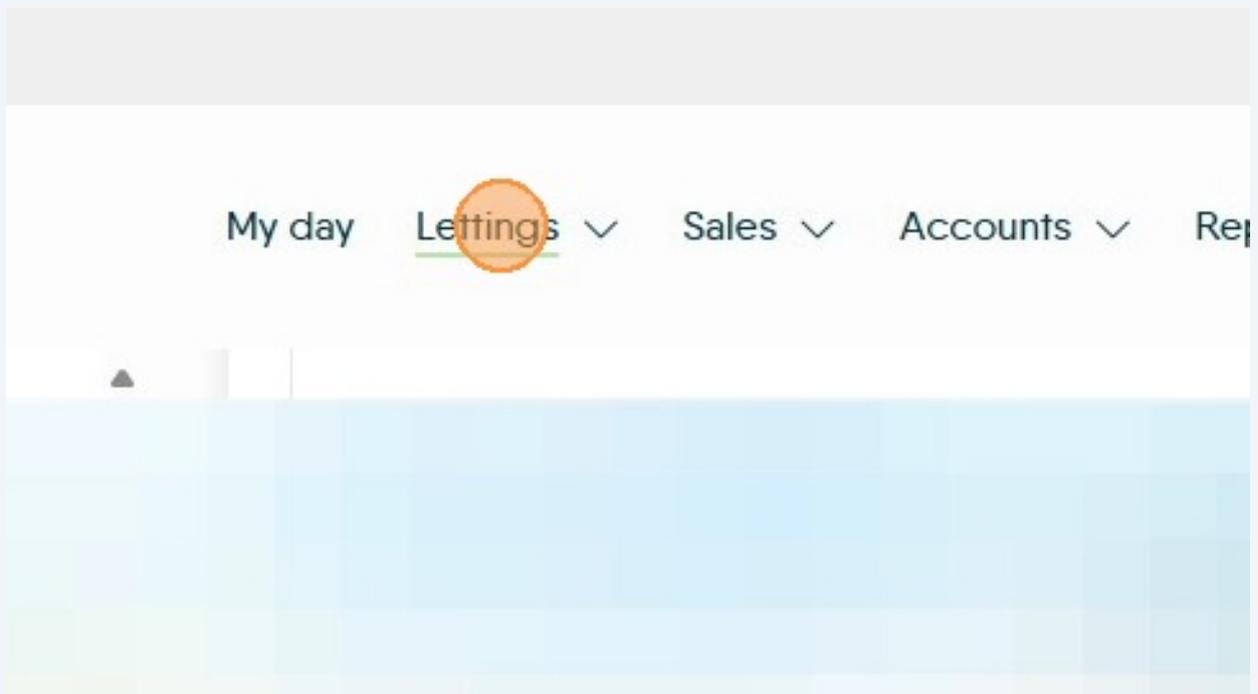
If your Applicant has no preference for Property type, select the "Not Specified" option. This will match against all property types.

Property Type	
<input type="text" value="no"/>	
Manor House	<input type="checkbox"/>
Not Specified	<input checked="" type="checkbox"/>

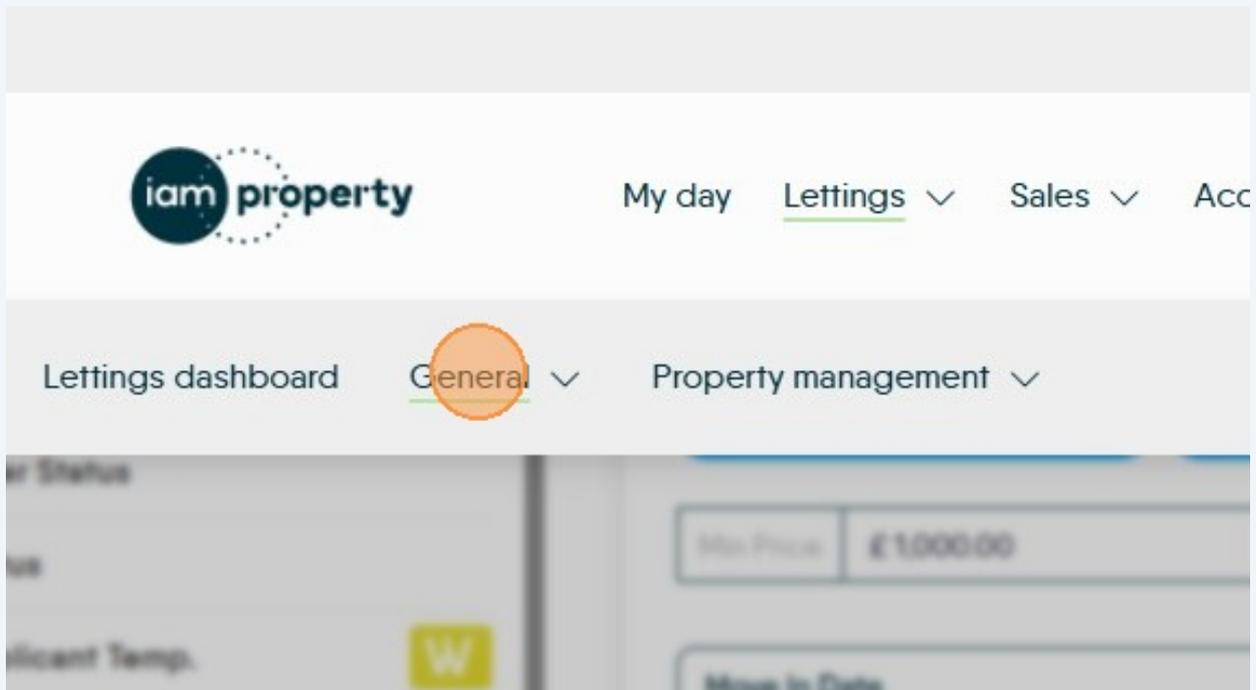
To Perform a Match.

- 18 There are a few ways to get to the matching screens. From the Sales and Lettings Menus and from Applicant and Property records.

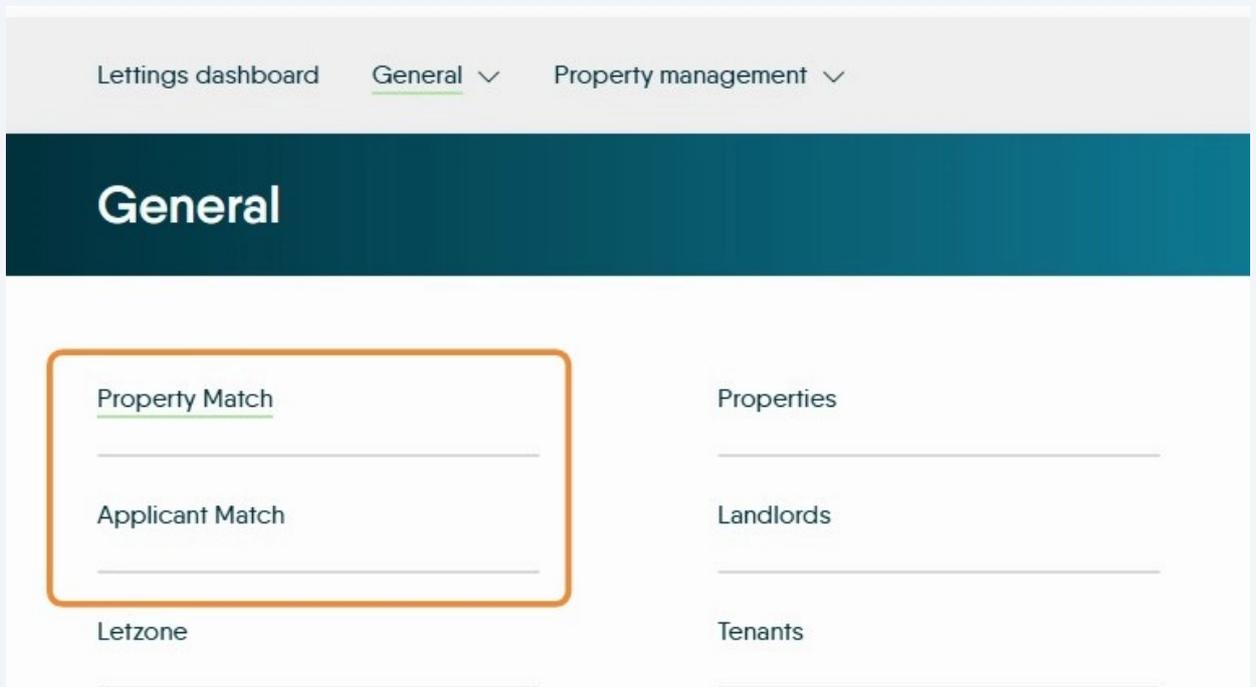
- 19 To access Lettings Matching from the main menu. Click "**Lettings**"



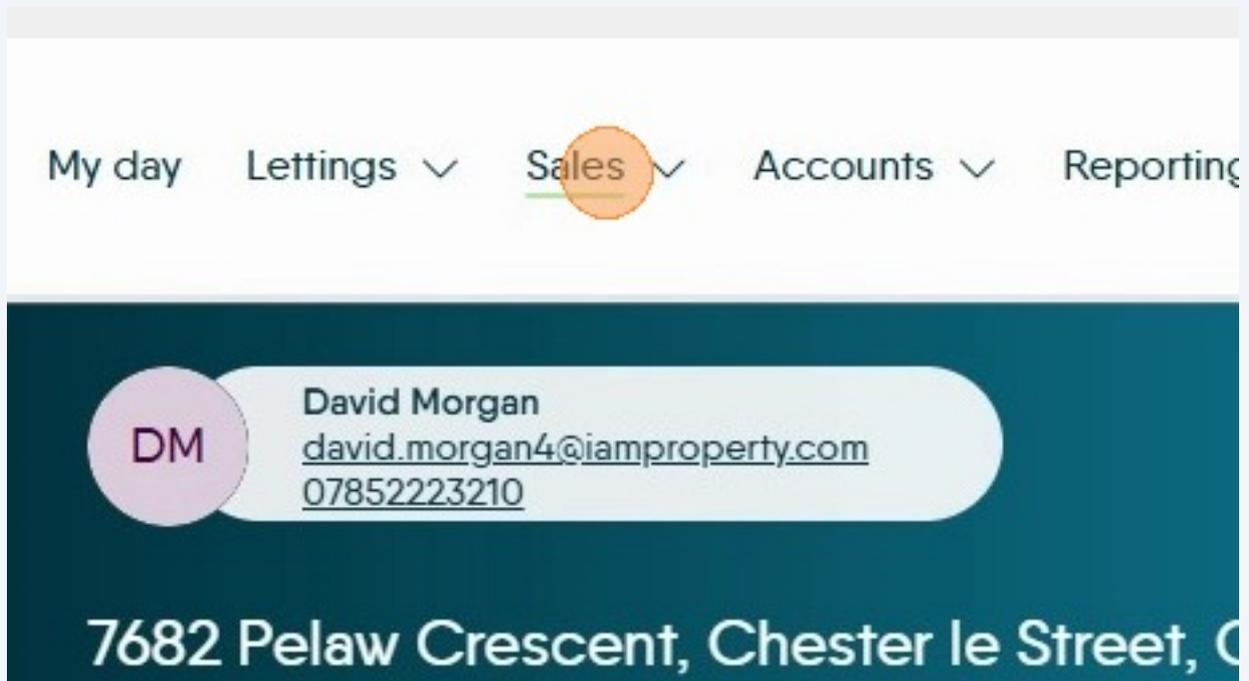
20 Click **"General"**



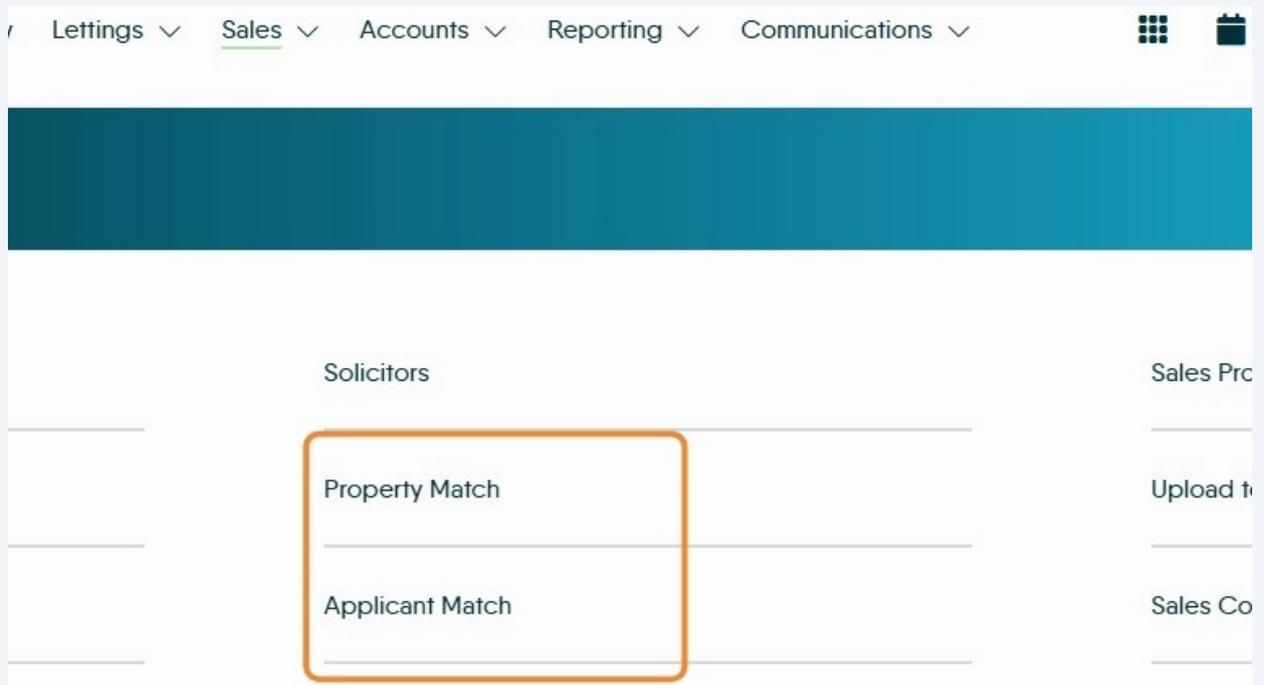
21 Click **"Property Match"** or **"Applicant Match"**



22 To access Sales Matching from the main menu. Click "**Sales**"

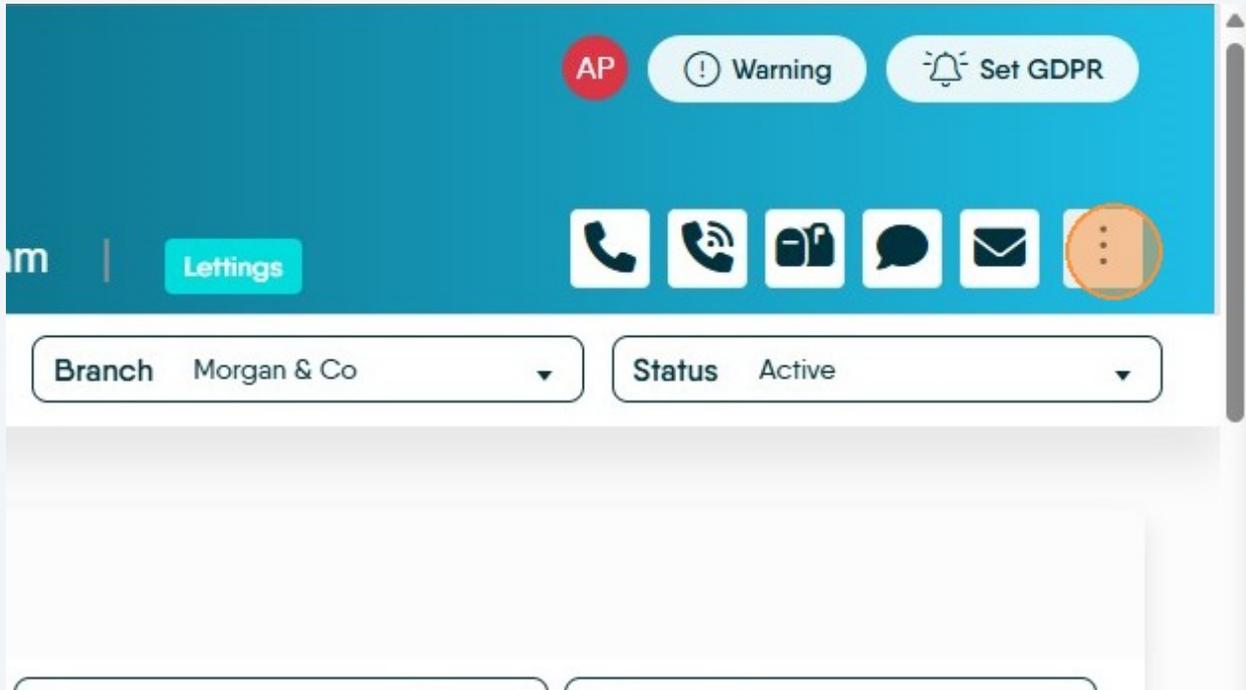


23 Click "**Property Match**" or "**Applicant Match**"

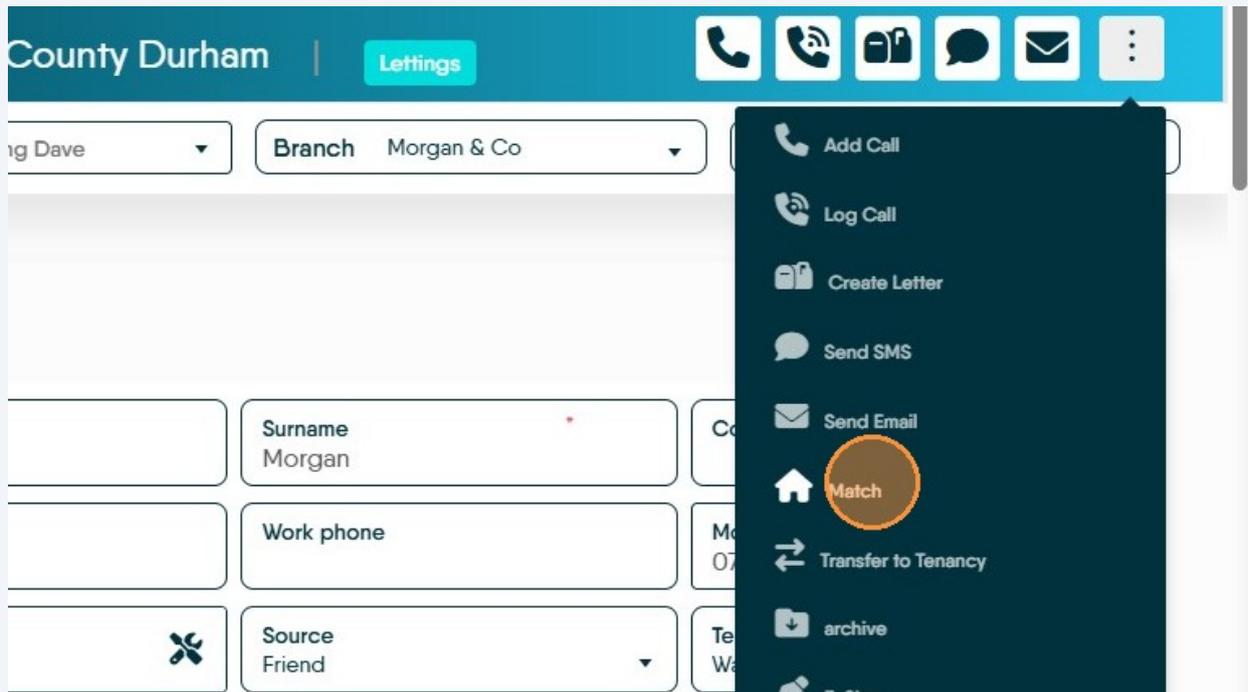


24 Matching Applicants to Properties (from property record)

25 From a property record. Click here.

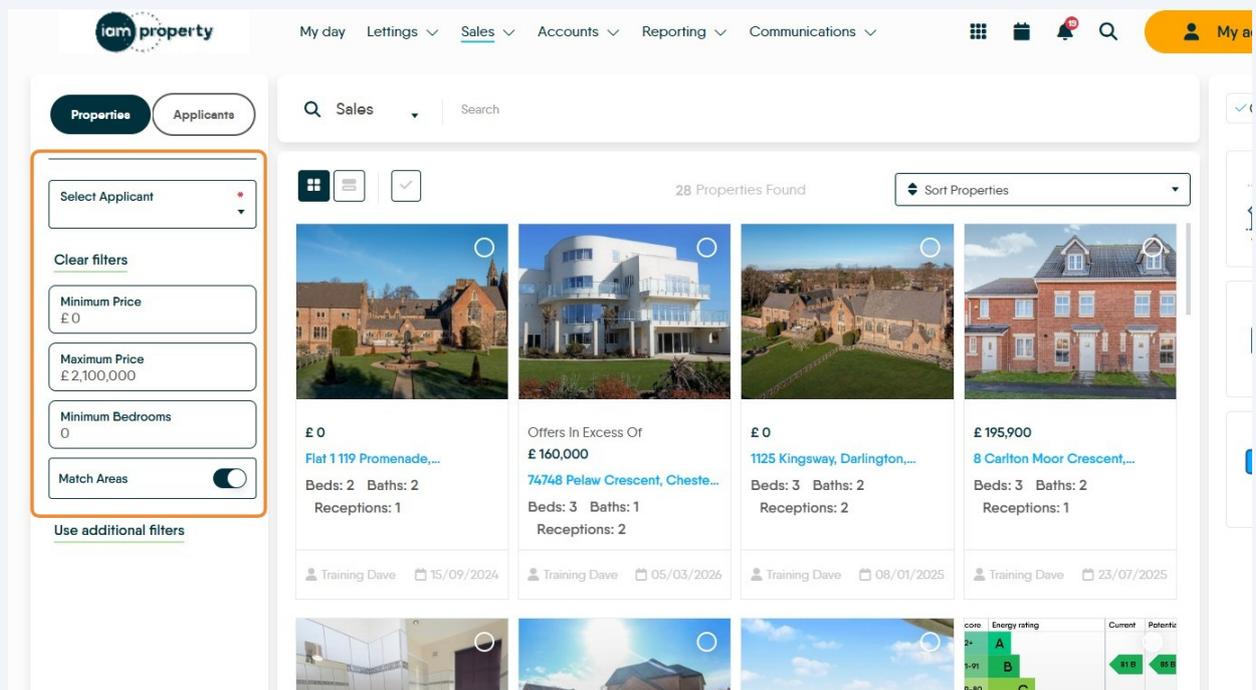


26 Click "Match"



27 The properties that match exactly with the applicants basic requirements will show on the screen, as highlighted. This brings back a broad match.

The match will look at properties that slightly exceed the maximum spend that the applicant has stated. Also the match will look at properties with the same price range and other requirements, that have more bedrooms/bathrooms than the minimum number.



28

To refine the match closer to the applicants requirements/properties features. Click **"Use additional filters"**

The screenshot shows a search interface with a left-hand sidebar and a main grid of property listings. The sidebar includes a 'Properties' tab, a 'Select Applicant' dropdown, and filter sections for 'Clear filters', 'Minimum Price' (£0), 'Maximum Price' (£2,100,000), 'Minimum Bedrooms' (0), and 'Match Areas' (with a toggle switch). An orange circle highlights the 'Use additional filters' button. The main grid shows '28 Properties Found' and a 'Sort Properties' dropdown. The first row of listings includes: 'Flat 1 119 Promenade, ...' (£0, 2 beds, 2 baths, 1 reception), 'Offers In Excess Of £160,000' for '74748 Pelaw Crescent, Cheste...', '1125 Kingsway, Darlington, ...' (£0, 3 beds, 2 baths, 2 receptions), and '8 Carlton Moor Crescent, ...' (£195,900, 3 beds, 2 baths, 1 reception). A partial energy rating chart is visible at the bottom right.

29

This will then bring any filters set against the applicant/property into use and refine the match. Filter options can also be turned on to narrow a match if required.

This screenshot shows the same search interface as above, but with the 'Use default filters' sidebar expanded. The sidebar contains sections for 'Property Type', 'Property Age', 'Property Style', 'Other Criteria', 'Minimum Bathrooms' (0), 'Only Show My Applicants' (toggle), 'Track Emails' (toggle), and a list of features: 'Single Garage', 'Parking', and 'Garden'. The main grid of property listings remains the same as in the previous screenshot.

30

Turning off 'Match Areas' will open the search to all properties in your database that meet the other criteria, turning off any option widens the match criteria.

The screenshot shows a property search interface. On the left, there is a sidebar with filters. The 'Match Areas' filter is highlighted with a red circle and a toggle switch. The main area displays a grid of 28 properties found. Each property card includes an image, price, location, and details like beds, baths, and receptions. A 'Match Areas' filter is highlighted with a red circle and a toggle switch.

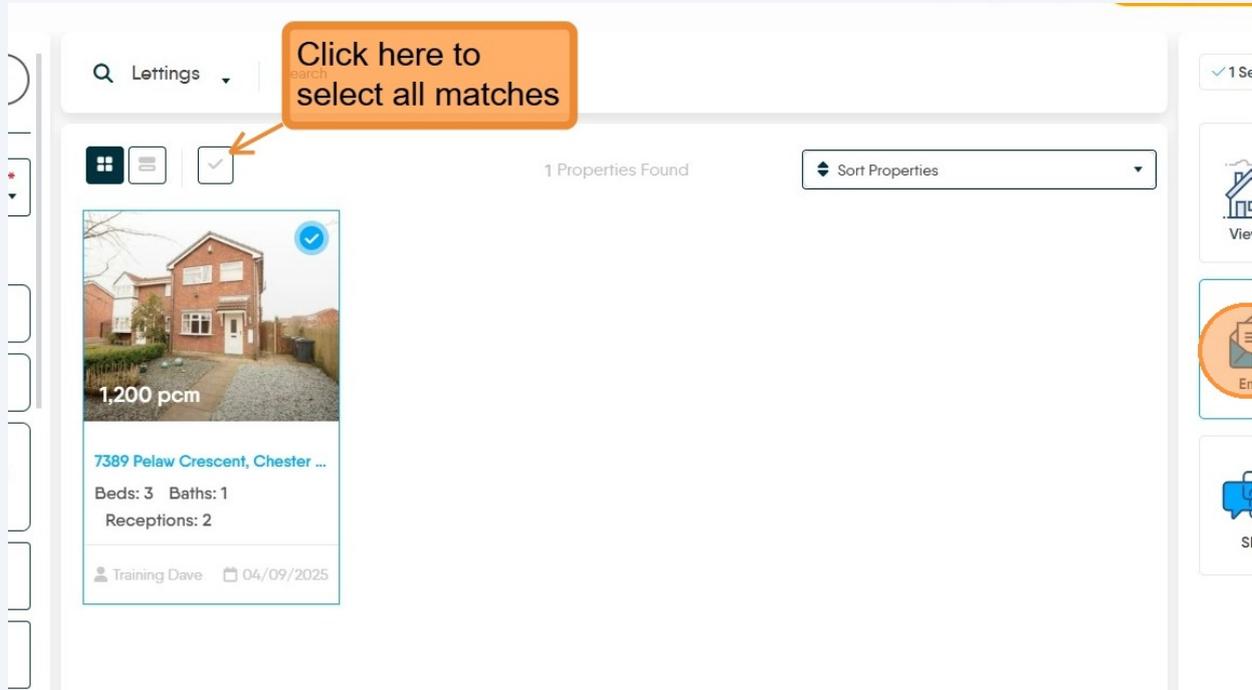
31

Once the match has been made then the properties will show on the screen. You have the option to call the applicant and discuss the property, arrange a viewing etc.

The screenshot shows a single property listing. The property is a brick house with a white door and a small garden. The price is 1,200 pcm. The location is 7389 Pelaw Crescent, Chester. The details are Beds: 3, Baths: 1, and Receptions: 2.

32

Alternatively you can send the property details by email or SMS to the client. Click in the top corner of the property tile, if there are multiple properties you can select as many as required. Then click the email or SMS icon.

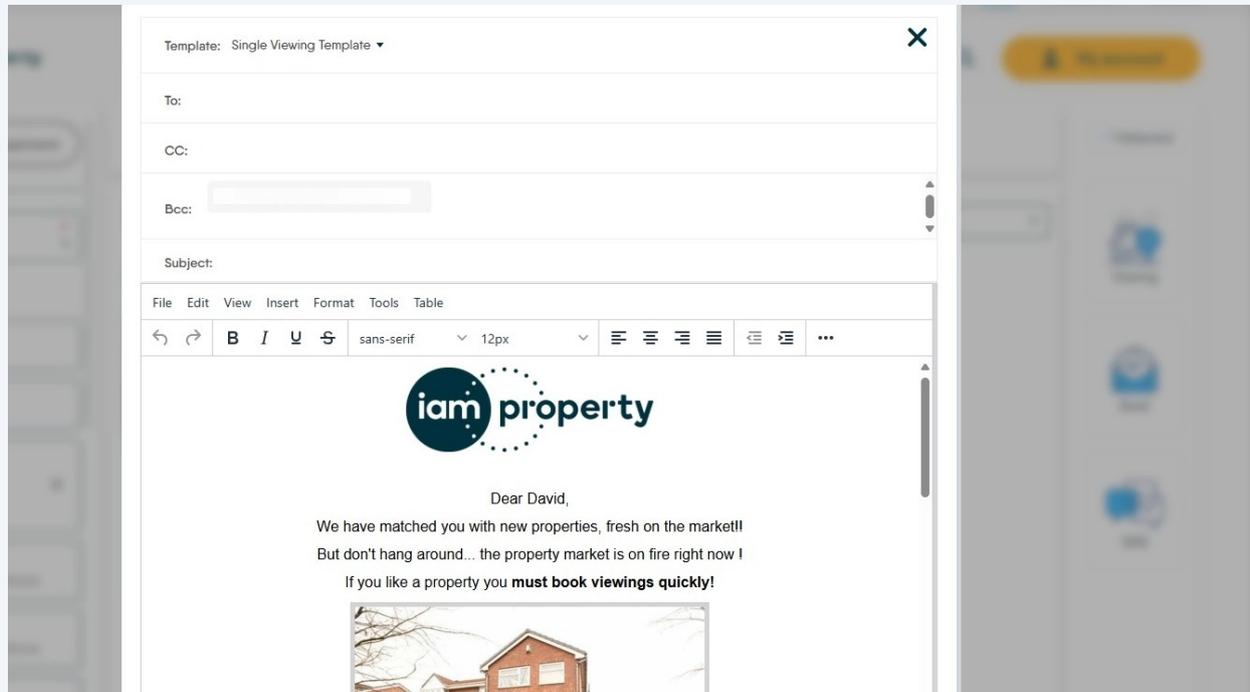


33

The email option will show the property matching template that you have created. If there are multiple property matches there is a different template that will link to all property details.

The templates can be quite basic or quite complicated, your decision. The option below is a simple Single property match template.

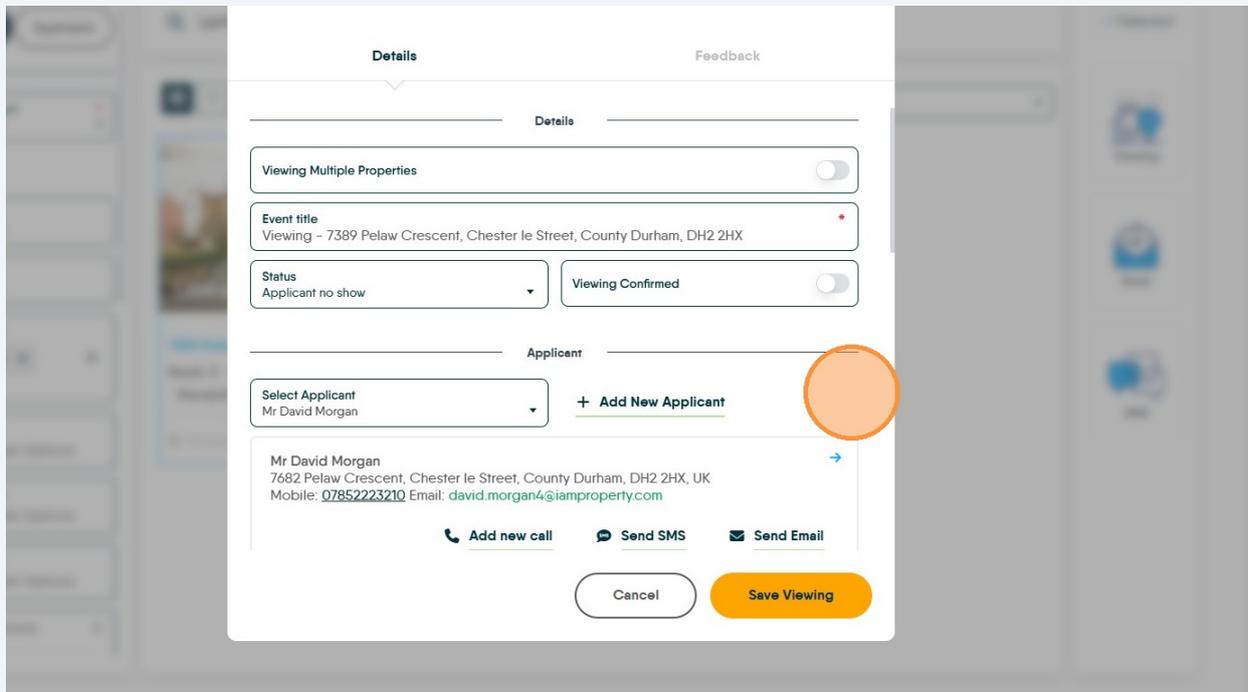
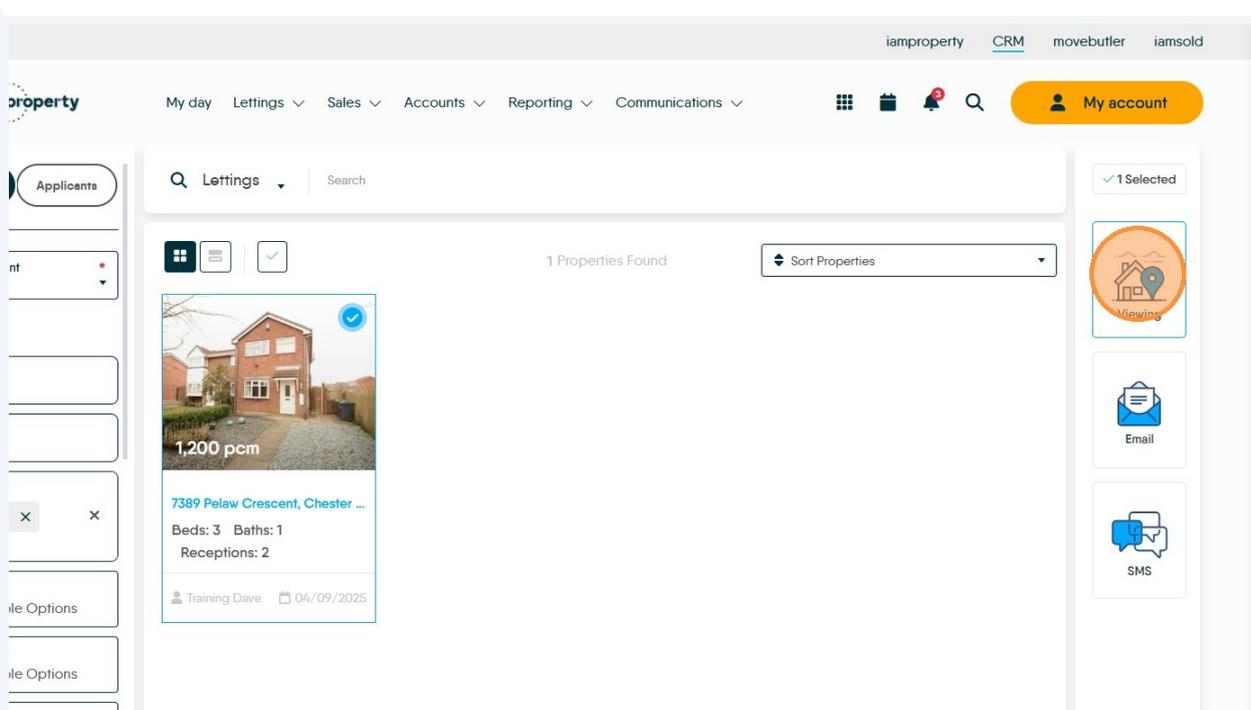
This guide [Click here](#) shows how to create sms and email templates.



34

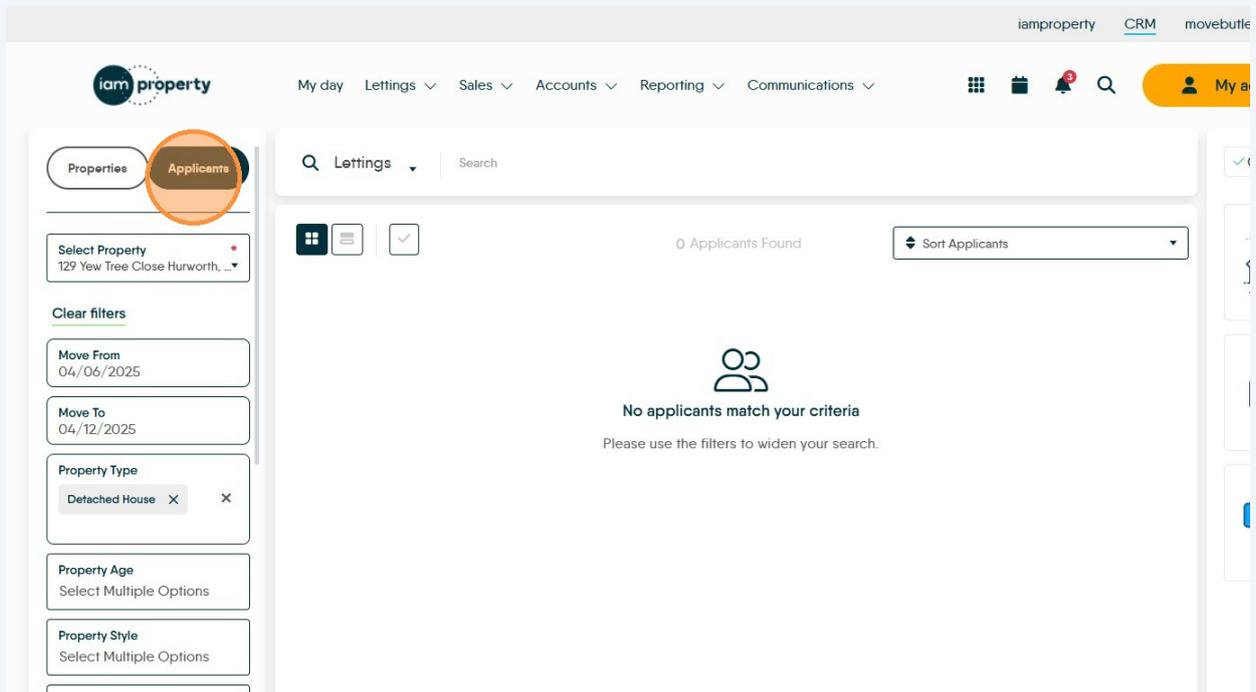
To book a viewing for the applicant at the matched property click the viewing icon and the viewing appointment screen will show on the screen.

If there are multiple property matches, individual viewings for each property can be created or if required one bulk booking can be made to view all properties in one day.

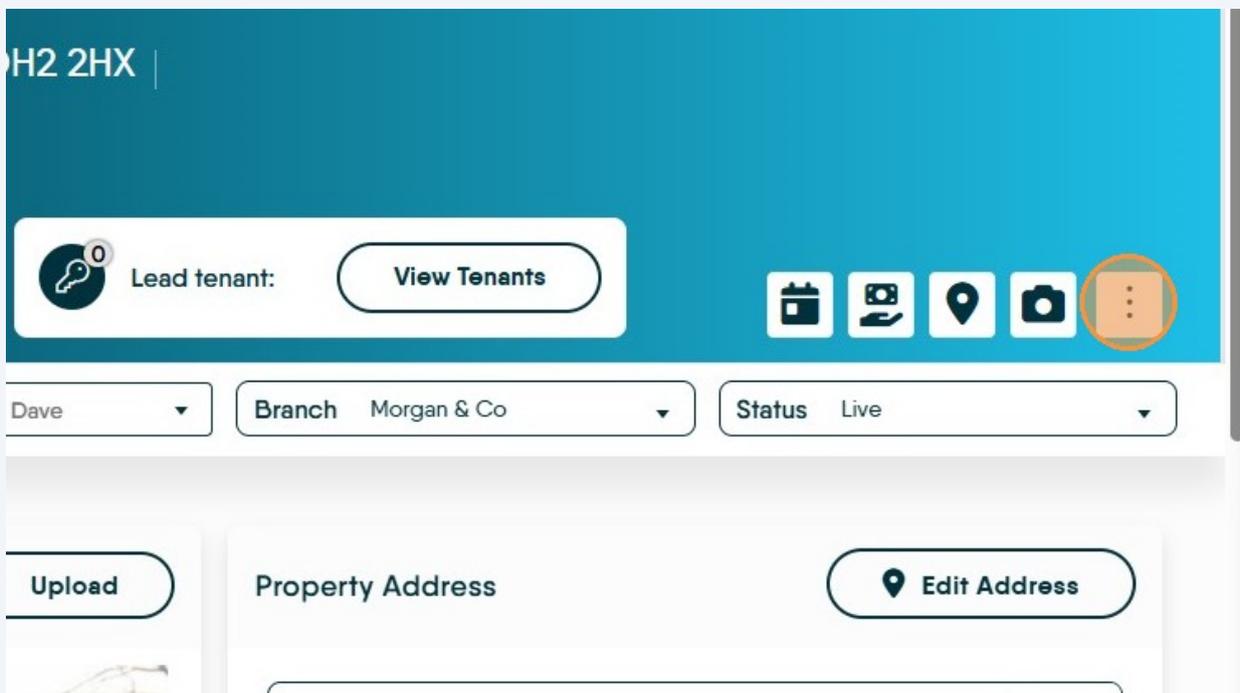


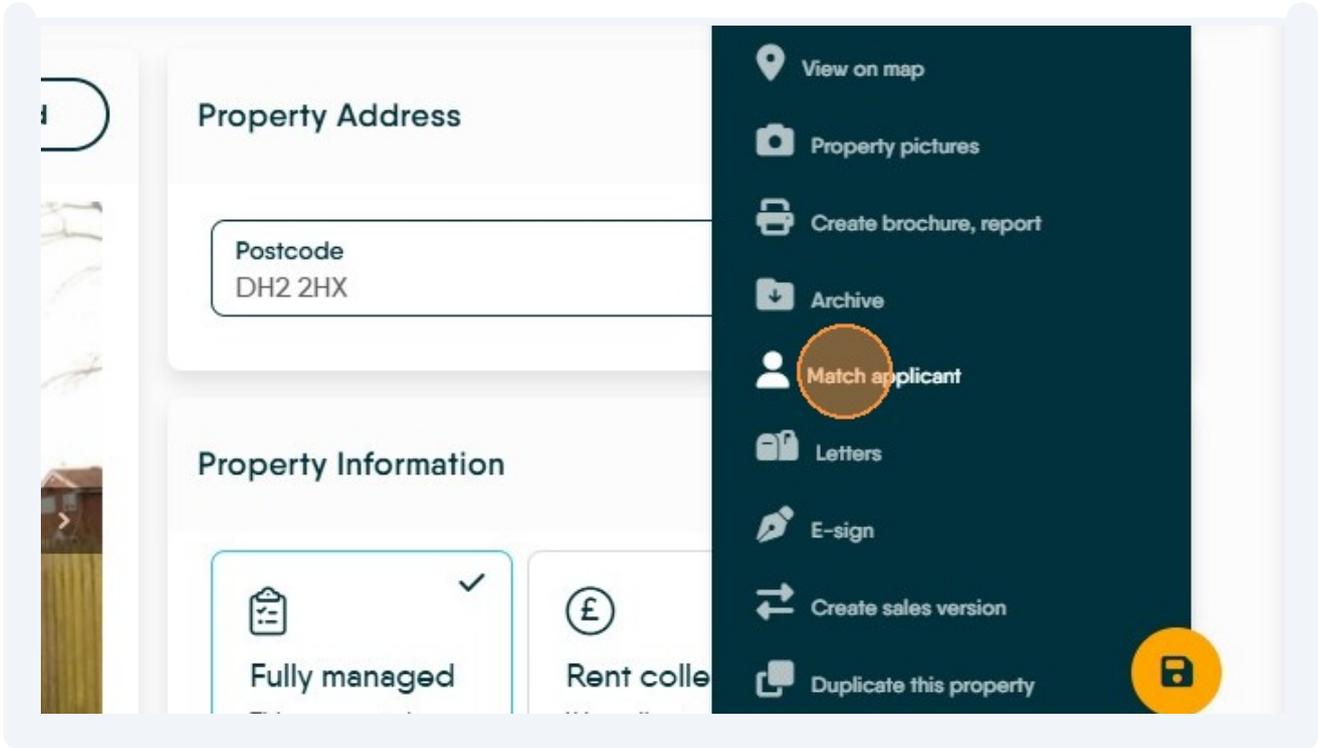
35 Matching Properties to Applicants (from applicant screen)

36 If you are in the Matching screen, click "**Applicants**"



37 From the **Property** screen, click the 3-dot menu and then "**Match Applicant**"

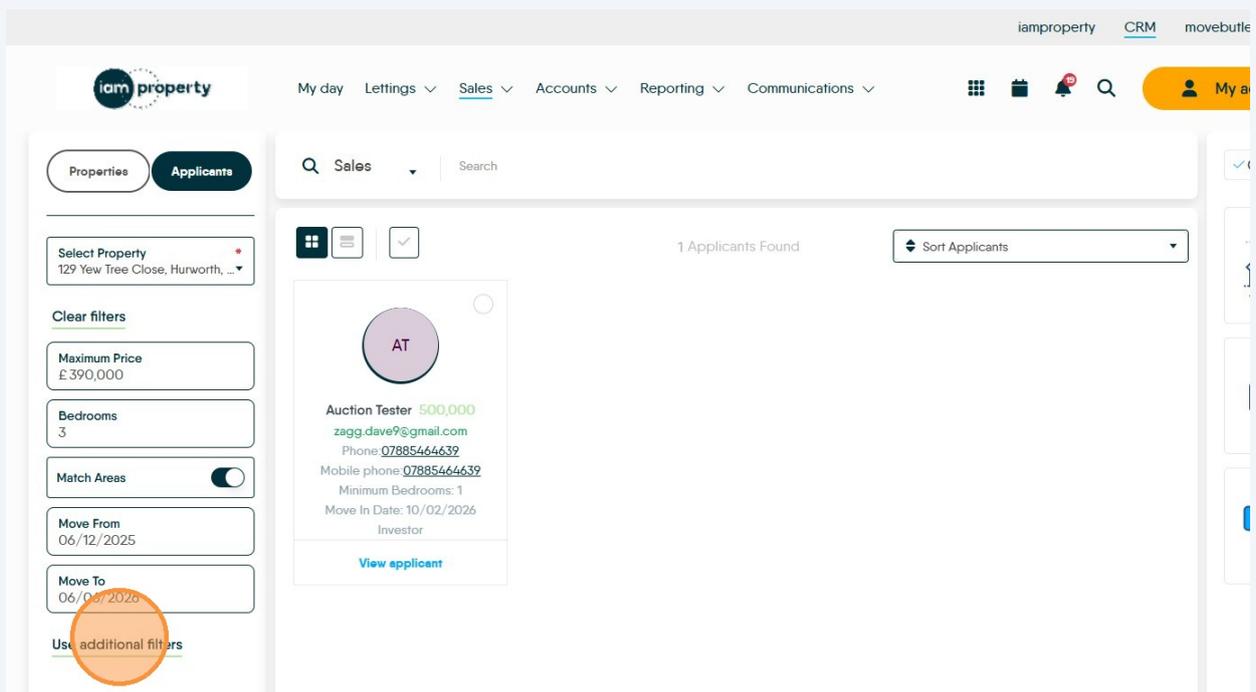




38

Applicants that match will show on the screen in the same way as matching from the applicant record.

If no, or few applicants show on the screen, start to edit the customers requirements by clicking the **"Use additional filters"**. It may be that a customer hasn't had a property type selected or other option not selected. Use your experience and knowledge of the customer to remove the options that are least important to the customer. Property Type may be a good place to start, a client looking for a semi detached may be happy to consider a detached in the same area.



39

Removing the 'Detached House' option causes a match, if more options are removed we may get more responses.

The screenshot shows a search interface for 'Sales' with the following filters on the left: 'Select Property' (129 Yew Tree Close, Hurworth, ...), 'Clear filters', 'Maximum Price' (£390,000), 'Bedrooms' (3), 'Match Areas' (checked), 'Move From' (06/12/2025), 'Move To' (06/06/2026), 'Use default filters', 'Property Type' (Detached House, circled in orange), and 'Property Age'. The main area shows '0 Applicants Found' and a message: 'No applicants match your criteria. Please use the filters to widen your search.'

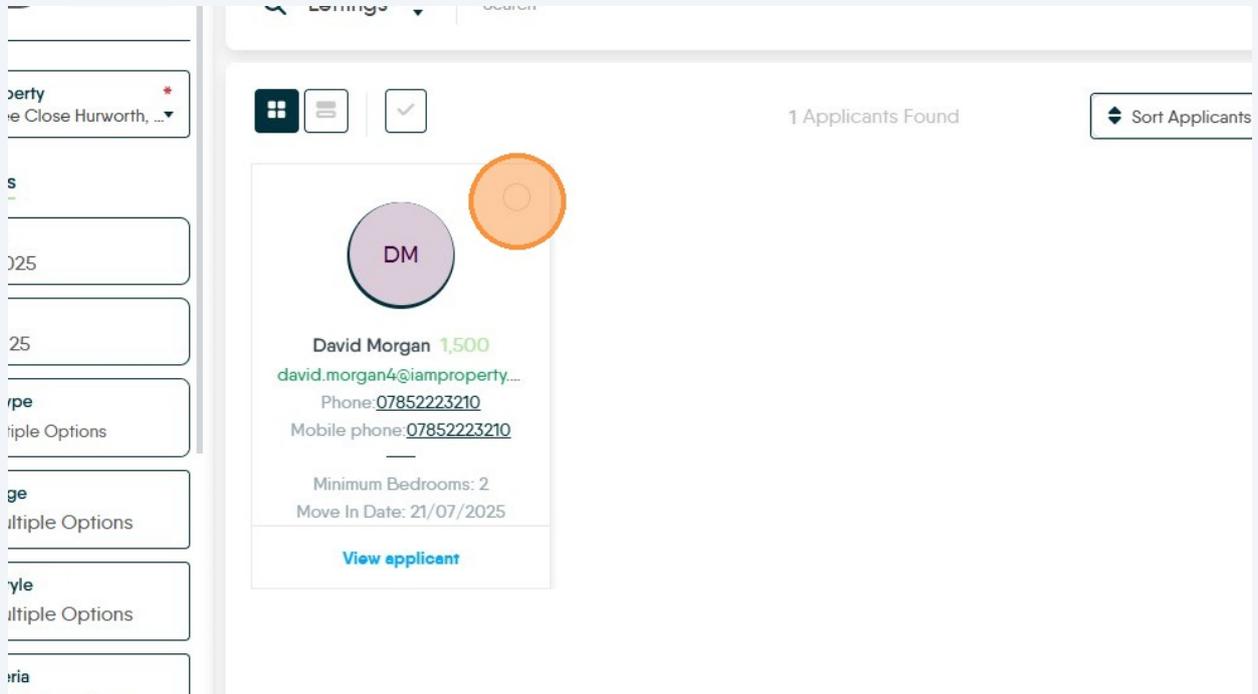
The screenshot shows the same search interface but with the 'Detached House' filter removed. The main area now shows '5 Applicants Found' and a list of applicants:

Applicant	Profile Picture	Role	Price	Contact
Testing This	TT	Testing This	5,000,000	test@vtuk.com Phone: 0 Mobile phone: 07456789456 Minimum Bedrooms: 0 Move In Date: 01/11/2023
Julie Morgan	JM	Julie Morgan	5,000,000	zaggg.dave@gmail.com Phone: 0132546585 Mobile phone: 078546255 Minimum Bedrooms: 3 Move In Date: 04/01/2024 Investor
Sales Applicant65	Sa	Sales Applicant65	400,000	zaggg.dave22@gmail.com Phone: 07454513212 Mobile phone: 07454513212 Minimum Bedrooms: 3 Move In Date: 07/03/2025 Property to Sell - Not on Market Yet
Sales Applicant65	sa	Sales Applicant65	5,000,000	zaggg.dave@gmail.com Phone: 078522364 Mobile phone: 074525522 Minimum Bedrooms: 0 Move In Date: 09/04/2025
Auction Tester	AT	Auction Tester	500,000	zaggg.dave9@gmail.com

40

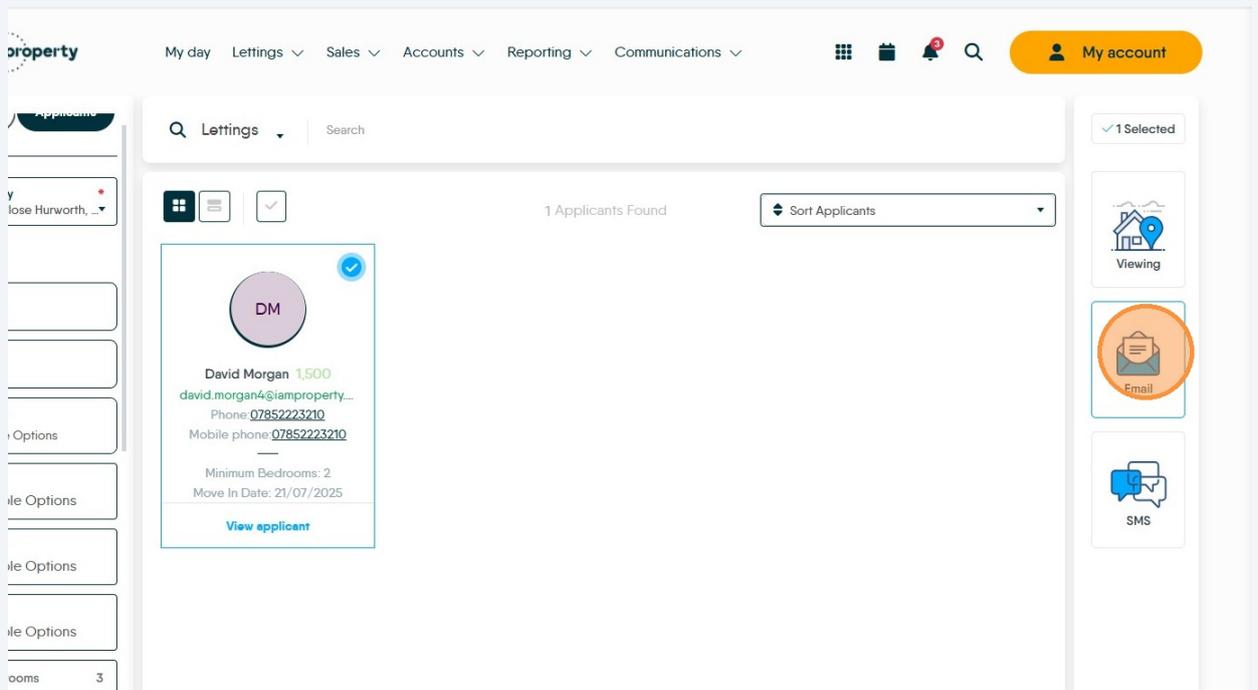
The contact numbers for the matches are shown on each tile to allow you to call them individually and discuss the property.

Click here to select that match. If there are multiple matches, multiple applicants can be selected individually or all at once (as shown previously).



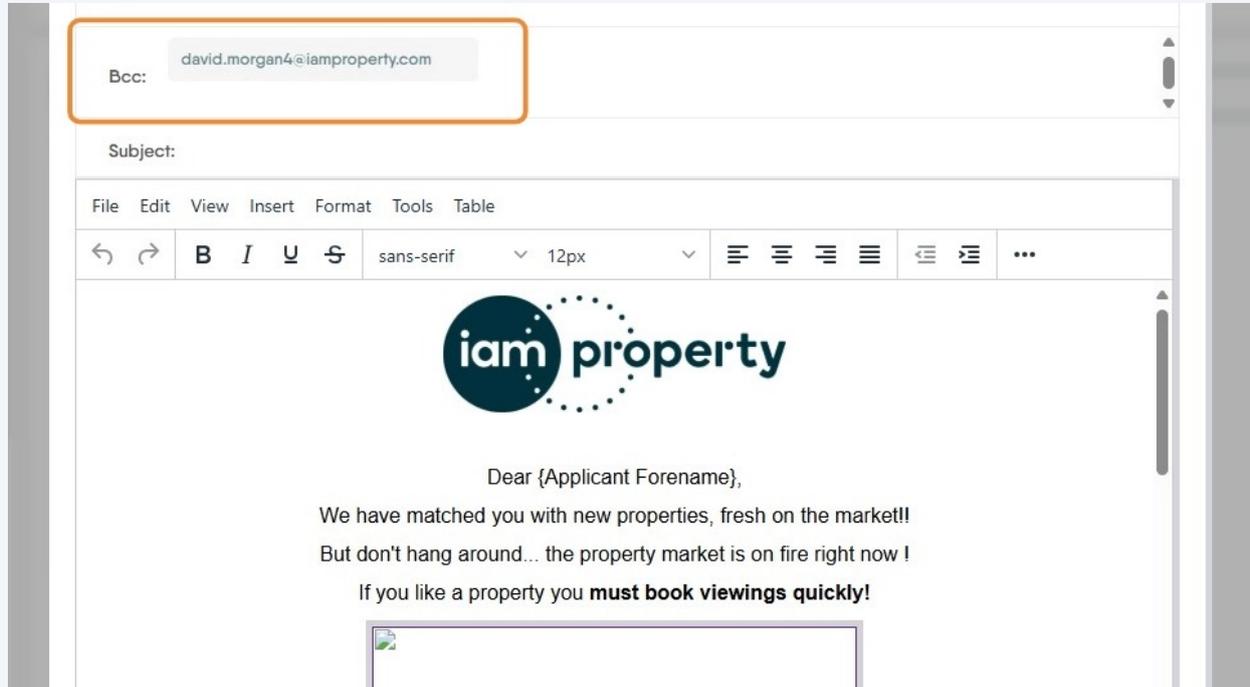
41

To email the details to the matches. Click email icon



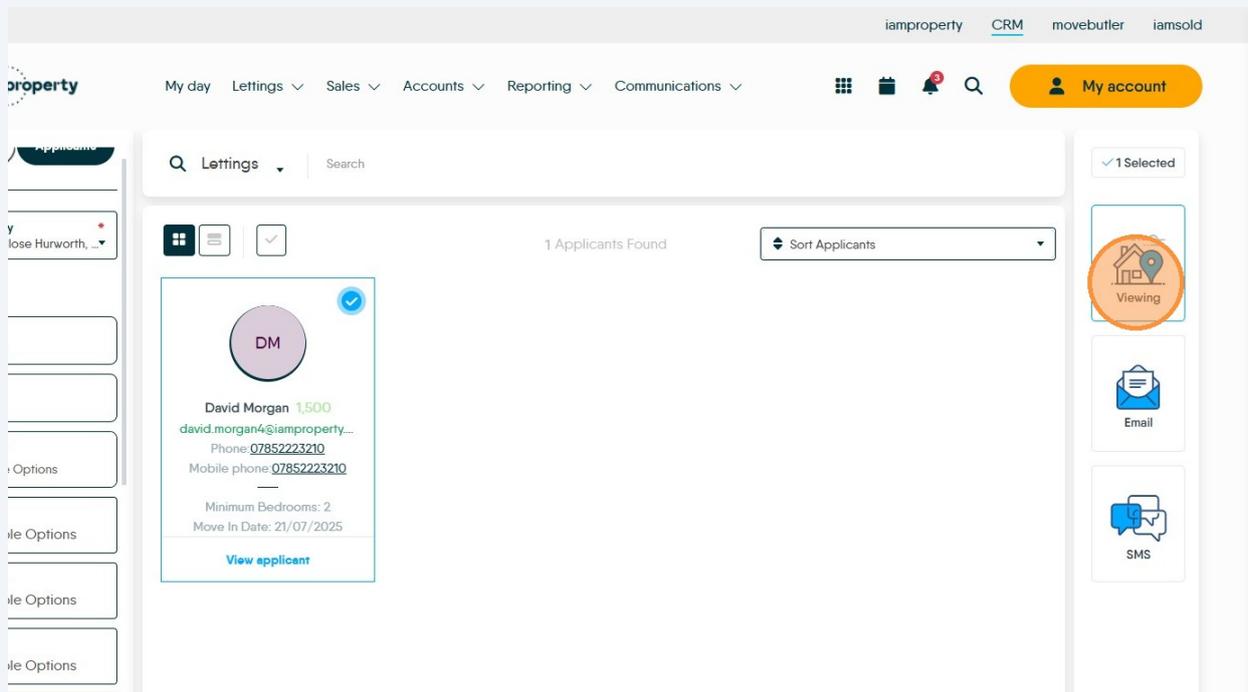
42

The match template you created will show on the screen with each applicant you are sending the details to added to the BCC field so each recipient gets their own personal message. Then click the 'Send email' button



43 To book a viewing. Click the "Viewing" icon.

n.b. only 1 viewing can be booked at a time.



44 Once all the options for the viewing are added. Click "Save Viewing"

