

LATEST RELEASES

10 September 2025 – VERSION 2.36.0



CRM RELEASE

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New features

Core process Simplification (Quick Add)

We've completely re-thought how you create new records in CRM – bringing everything into a single, joined-up flow.

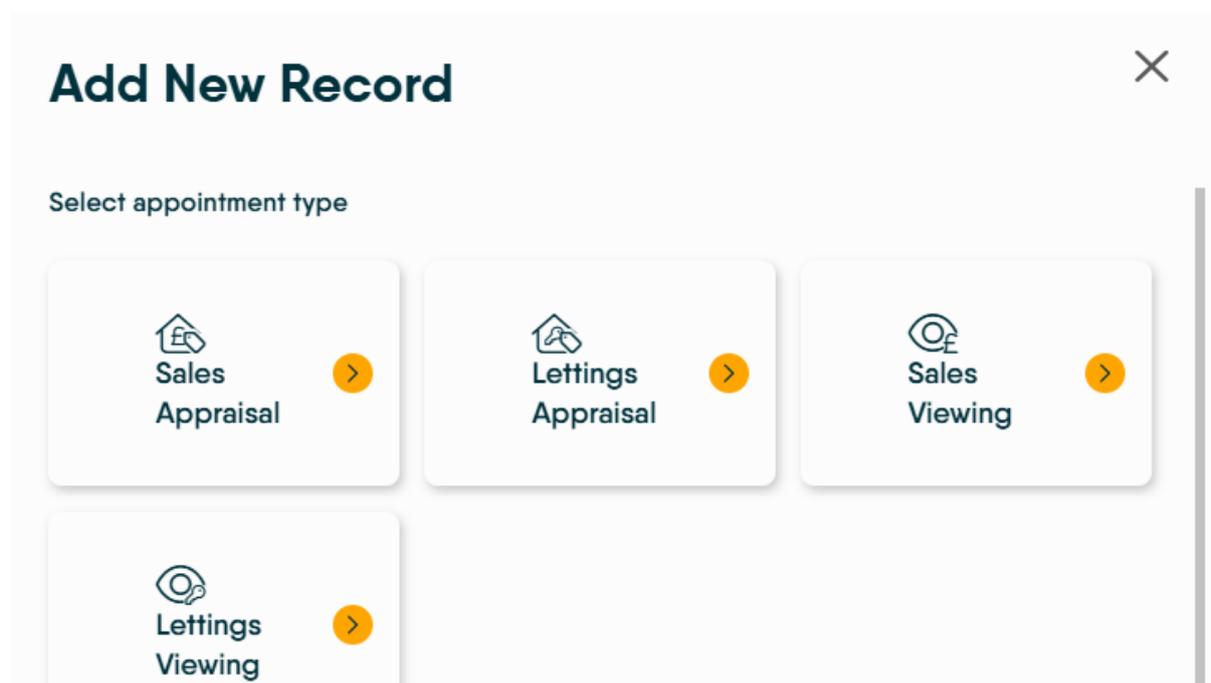
This includes new flows for booking sales and lettings appraisals or viewings – covering all the key steps from adding the client, to the property, to the appointment – all in one go.

Simplified flows will cover adding

- Sales & Lettings appraisals
- Sales & Lettings viewings
- Sales & Lettings applicants
- Sales & Lettings properties
- Vendors
- Landlords

You can launch it straight from My Day or the quick add menu – and because it runs a conflict check, you won't accidentally create duplicate records.

Check out the Help Centre for more details <https://helpcentre.iamproperty.com/hc/en-gb>.



'Clear formatting' button on property marketing description fields

We've introduced a new "**Clear Formatting**" button in the marketing description fields on property records (Sales and Lettings). This option sits alongside the existing formatting tools (bold/italic/underline) and allows you to quickly remove all HTML styling from their text.

When clicked, users will see a confirmation modal before proceeding. Choosing to clear will strip all formatting — including bold, italics, underlines, and line breaks — across the entire field. The plain text version will only be saved once the property record itself is saved.



All-Day Appointments Now Sync to Outlook events

We've enhanced calendar syncing to ensure **all-day appointments created in the CRM now sync seamlessly to Outlook**, alongside standard timed events. This update means both one-off timed meetings and full-day bookings will remain aligned across your CRM and Outlook calendars.

With this improvement, users no longer need to manually duplicate all-day events in Outlook — keeping schedules accurate and consistent.

Additional updates & General Improvements

We've continued to make enhancements to CRM

For more information or support call: 01865 860 871