

Core Process Simplification - Adding a Sales/Lettings Appraisal in CRM



This guide provides a step-by-step process for adding a new sales or letting appraisal record efficiently in the iamproperty CRM system.

By following the outlined instructions, users can ensure accuracy and completeness in their appraisals, which is crucial for effective property management. It simplifies the process, making it accessible even for those unfamiliar with the system, ultimately enhancing productivity and organisation in sales operations.

1 Navigate to <https://crm.iamproperty.com/MyDay>

iam property

My day Lettings Sales Accounts Reporting Communications

My account

Welcome back, Training

+ Add New Record

View Property Management

Visit Help Centre

Search all records

Today's events

No events

You have no events today

+ Add New Event

My tasks

Status	Name	Priority	Start date	Due date
Not Started	Call Landlord	High	15/Nov/2024	15/Nov/2024
Not Started	test	High	27/Nov/2024	27/Nov/2024
Not Started	Call Landlord	Medium	12/Dec/2024	12/Dec/2024
Not Started	Make sure Santa has presents	Medium	13/Dec/2024	25/Dec/2024

2 Click either the "More actions" icon then click here.

I come back, Training

Add New Record

View Property Management

Visit Help Centre

Records

My events

No events

You have no events today

My tasks

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

I come back, Training

Add New Record

View Property Management

Visit Help Centre

Records

My events

No events

You have no events today

My tasks

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

- Active branches
- Calendar
- + Add new record
- Calls
- Contacts
- Events
- Notes
- Tasks

3 or click "Add New Record"

The screenshot shows the 'iam property' CRM dashboard. The top navigation bar includes 'My day', 'Lettings', 'Sales', 'Accounts', 'Reporting', and 'Communications'. A search bar is on the right. The main heading is 'Welcome back, Training'. Below it, there are three buttons: '+ Add New Record' (highlighted with an orange circle), 'View Property Management', and 'Visit Help Centre'. A search bar for 'Search all records' is below. The dashboard is divided into two sections: 'Today's events' (showing 'No events') and 'My tasks' (a table of tasks).

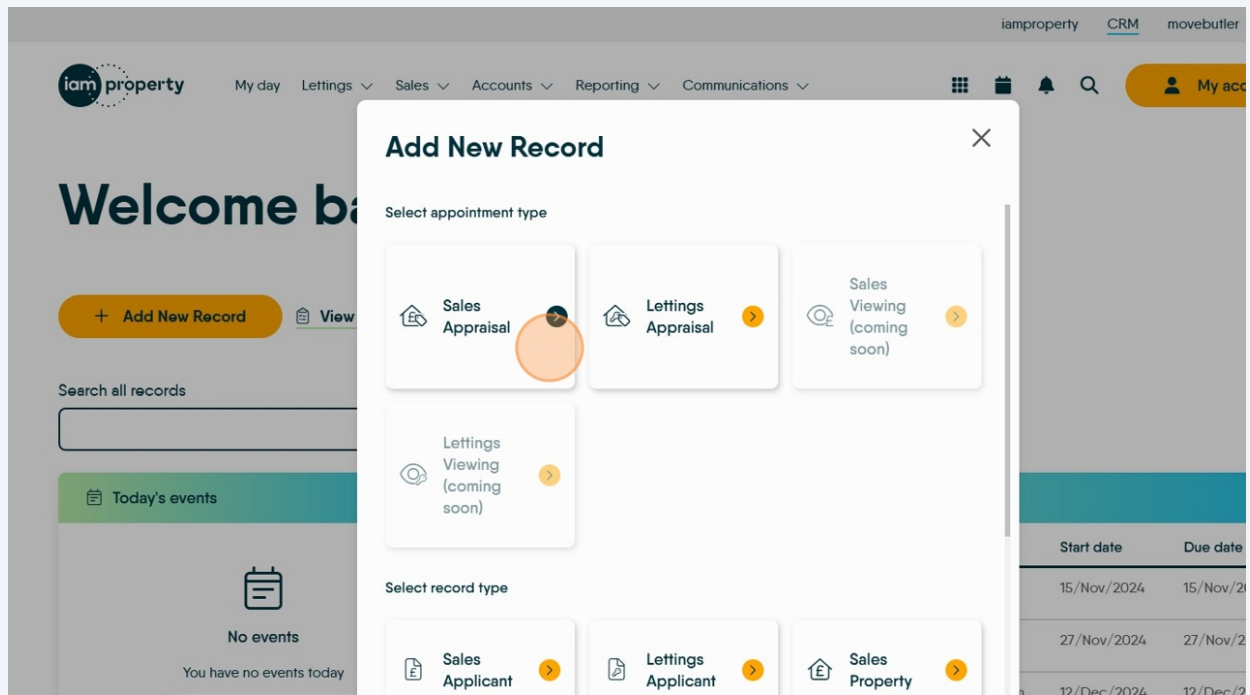
Status	Name	Priority	Start date	Due date
Not Started	Call Landlord	High	15/Nov/2024	15/Nov/2024
Not Started	test	High	27/Nov/2024	27/Nov/2024
Not Started	Call Landlord	Medium	12/Dec/2024	12/Dec/2024

4 Click either "Sales Appraisal" or "Lettings Appraisal" as required.

For this example we are using Sales Appraisal.

The screenshot shows the 'Add New Record' modal. It has a title bar with a close button. The modal is divided into two sections: 'Select appointment type' and 'Select record type'. In the 'Select appointment type' section, 'Sales Appraisal' is selected (highlighted with an orange circle). Other options include 'Lettings Appraisal' and 'Sales Viewing (coming soon)'. In the 'Select record type' section, there are three options: 'Sales Applicant', 'Lettings Applicant', and 'Sales Property'.

5 Click "Sales Appraisal"



Vendor/Landlord

6 Complete all the details for the Primary Vendor. Then set the Branch and Negotiator details.

< [Back to my day](#) >> Create Sales Appraisal Appointment

Create Sales Appraisal Appointment

Primary Vendor

Title Forename* Surname*

Email* Mobile phone

Phone number Work phone

Branch* Negotiator*

☐ Vendor's address is different to the property

- 1 Primary Vendor
- 2 Secondary Ver
- 3 Property
- 4 Appraisal

Create Sales Appraisal Appointment

Primary Vendor

Title	Forename *	Surname *
<div>Mr</div>	<div> </div>	
Email *		Mobile phone
<div></div>		<div></div>
Phone number		Work phone
<div></div>		<div></div>
Branch *		Negotiator *
<div></div>		<div></div>
<input type="checkbox"/> Vendor's address is different to the property		

- 1 Primary Vendor
- 2 Secondary Ver
- 3 Property
- 4 Appraisal

Create Sales Appraisal Appointment

Primary Vendor

Title	Forename *	Surname *
<div>Mr</div>	<div>David</div>	<div>Morgan</div>
Email *		Mobile phone
<div>crm.training@iamproperty.com</div>		<div>071234121212</div>
Phone number		Work phone
<div>01865860873</div>		<div>01865860873</div>
Branch *		Negotiator *
<div>Morgan & Co</div>		<div>Mr Training Dave</div>
<input type="checkbox"/> Vendor's address is different to the property		

- 1 Primary Vendor
- 2 Secondary Vendor
- 3 Property
- 4 Appraisal

Add Another Vendor

Cancel

Continue

Create Sales Appraisal Appointment

Primary Vendor

Title *	Forename *	Surname *
Mr	David	Morgan
Email *		Mobile phone
crm.training@iamproperty.com		071234121212
Phone number		Work phone
01865860873		01865860873
Branch *	Negotiator *	
Morgan & Co	Mr Training Dave	

☐ Vendor's address is different to the property

[Add Another Vendor](#) [Cancel](#) [Continue](#)

- 1 Primary Vendor
- 2 Secondary Vendor
- 3 Property
- 4 Appraisal

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If the Vendor is **not** selling their primary residence. Click "Vendor's address is different to the property"

Primary Vendor

Title	Forename *	Surname *
Mr	David	Morgan
Email *		Mobile phone
crm.training@iamproperty.com		071234121212
Phone number		Work phone
01865860873		01865860873
Branch *	Negotiator *	
Morgan & Co	Mr Training Dave	

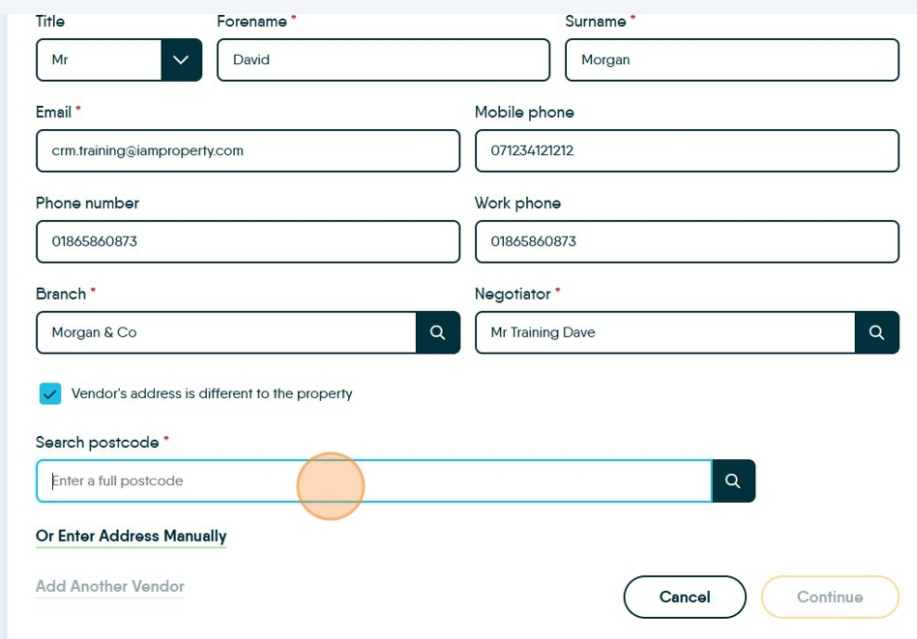
Vendor's address is different to the property

[Add Another Vendor](#) [Cancel](#) [Continue](#)

- 1 Primary Vendor
- 2 Secondary Vendor
- 3 Property
- 4 Appraisal

8

Either click the "Search postcode *" field, or, the "Enter Address Manually" option and add the Vendors address. This is only required if the Vendor is not selling their primary residence.



The form contains the following fields and options:

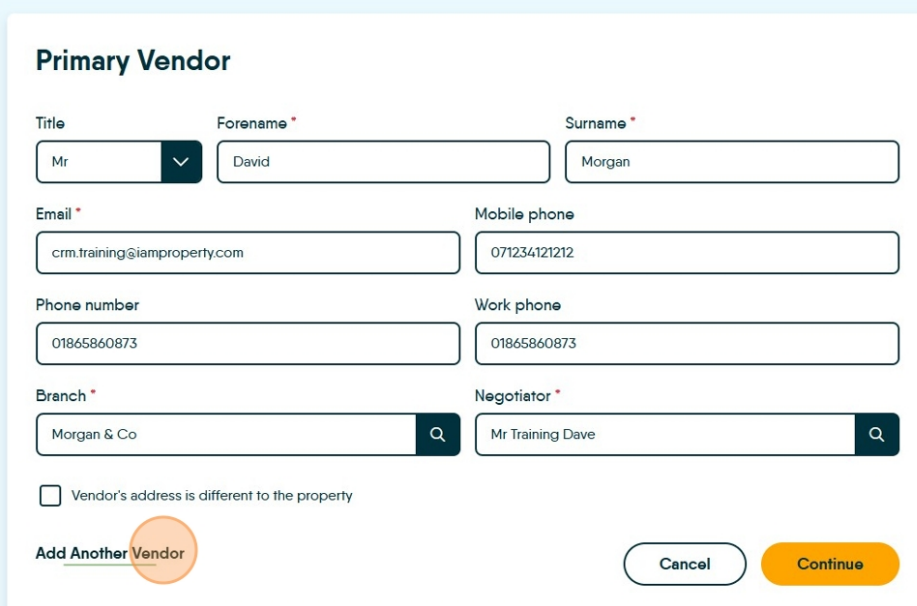
- Title**: Mr (dropdown)
- Forename ***: David
- Surname ***: Morgan
- Email ***: crm.training@iamproperty.com
- Mobile phone**: 071234121212
- Phone number**: 01865860873
- Work phone**: 01865860873
- Branch ***: Morgan & Co (dropdown)
- Negotiator ***: Mr Training Dave (dropdown)
- ☒ Vendor's address is different to the property
- Search postcode ***: Enter a full postcode (text input with an orange circle highlighting it)
- Or Enter Address Manually** (link)
- Add Another Vendor** (link)
- Buttons**: Cancel, Continue

- 1 Primary Vendor
- 2 Secondary Vendor
- 3 Property
- 4 Appraisal

9

If there are multiple vendors click "Add another vendor" to add a second vendor.

N.B. You can only add 2 Vendors or Landlords at this point, additional entries can be added via the property record (as currently)



The form contains the following fields and options:

- Title**: Mr (dropdown)
- Forename ***: David
- Surname ***: Morgan
- Email ***: crm.training@iamproperty.com
- Mobile phone**: 071234121212
- Phone number**: 01865860873
- Work phone**: 01865860873
- Branch ***: Morgan & Co (dropdown)
- Negotiator ***: Mr Training Dave (dropdown)
- ☐ Vendor's address is different to the property
- Add Another Vendor** (link with an orange circle highlighting it)
- Buttons**: Cancel, Continue

- 1 Primary Vendor
- 2 Secondary Vendor
- 3 Property
- 4 Appraisal

10 Adding the Secondary Vendor is the same as creating a primary.

iamproperty CRM movebutler iamsold

My day Lettings Sales Accounts Reporting Communications My account

< Back to my day >> Create Sales Appraisal Appointment

Create Sales Appraisal Appointment

Primary Vendor

David Morgan

Address: Same as property

Email: crm.training@iamproperty.com

Mobile phone: 71234121212

Branch: Morgan & Co

Phone number: 1865860873

Work phone: 1865860873

Negotiator: Mr Training Dave

Secondary Vendor

Title Forename * Surname *

Email * Mobile phone

- 1 Primary Vendor
- 2 Secondary Vendor
- 3 Property

11 If this Vendor/Landlord address is different. Click here.
Click here.



Secondary Vendor



Title	Forename *	Surname *
<input type="text"/>	<input type="text"/>	<input type="text"/>
Email *		Mobile phone
<input type="text"/>		<input type="text"/>
Phone number	Work phone	
<input type="text"/>	<input type="text"/>	
Branch *	Negotiator *	
<input type="text"/>	<input type="text"/>	

☐ Vendor's address is different to the property

Cancel

Continue

- 1 Primary Vendor
- 2 Secondary Vendor
- 3 Property
- 4 Appraisal

Mobile phone: 71234121212
Branch: Morgan & Co

Work phone: 1865860873
Negotiator: Mr Training Dave

Property

Address *			
<input type="text"/>			
Enter a full postcode			
Or Enter Address Manually			
Property type	Property age	Occupier	Negotiator *
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Bedrooms	Bathrooms	Receptions	
<input type="text"/>	<input type="text"/>	<input type="text"/>	

Cancel

Continue

- 1 Primary Vendor
- 2 Secondary Vend
- 3 Property
- 4 Appraisal

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If a second Vendor/Landlord has been added by mistake or an error has been made it can be deleted by clicking here

Primary Landlord

ff

Address: Same as property

Email: f@f.com

Negotiator: Mr Training Dave

Branch: Morgan & Co

Secondary Landlord

gg

Address: Same as property

Email: g@g.com

Branch: Morgan & Co

Email: g@g.com

Negotiator: Mr Training Dave

Property

1 Primary Landlo

2 Secondary Lan

3 Property

Property

13

Click the "Address *" field and add the postcode

iam property

My day Lettings Sales Accounts Reporting Communications

Grid Calendar Bell Search

My acc

Mobile phone: 71234121212

Branch: Morgan & Co

Work phone: 1865860873

Negotiator: Mr Training Dave

Property

Address *

Enter a full postcode

Or Enter Address Manually

Property type

Property age

Occupier

Negotiator *

Bedrooms

Bathrooms

Receptions

1 Primary Vendor

2 Secondary Ver

3 Property

4 Appraisal

14 Click here to edit the address if required.

Email: crm.training@iamproperty.com
Mobile phone: 71234121212
Branch: Morgan & Co

Phone number: 1865860873
Work phone: 1865860873
Negotiator: Mr Training Dave

Property

71 Pelaw Crescent Chester le Street County Durham DH22HX



Property type

Property age

Occupier

Negotiator *

Bedrooms

Bathrooms

Receptions

Cancel

Continue

- 1 Primary Vendor
- 2 Secondary Vendor
- 3 Property
- 4 Appraisal

15 Click "Or enter address manually"

Mobile phone: 71234121212
Branch: Morgan & Co

Work phone: 1865860873
Negotiator: Mr Training Dave

Property

Address *

71 Pelaw Crescent Chester le Street County Durham DH22HX



Or Enter Address Manually

Property type

Property age

Occupier

Negotiator *

Bedrooms

Bathrooms

Receptions

Cancel

Continue

- 1 Primary Vendor
- 2 Secondary Vendor
- 3 Property
- 4 Appraisal

Branch: Morgan & Co

Negotiator: Mr Training Dave

Property

House *

7155

Line 1 *

Pelaw Crescent

Line 2

Enter address line 2

Town *

Chester le Street

County *

County Durham

Select country *

1 Primary Vendor

2 Secondary Vendor

3 Property

4 Appraisal

16

Click the "Property type" field and set the property type from the drop down menu.

County *

County Durham

Select country *

UK

Postcode *

DH22HX

Use Postcode Lookup

Property type

|



Property age

Occupier

Negotiator *



Bedrooms

Bathrooms

Receptions

Cancel

Continue

Property

4 Appraisal

17 Select the "Property Age"

County *
County Durham

Select country *
UK

Postcode *
DH22HX

[Use Postcode Lookup](#)

Property type: Detached House

Property age: Modern

Occupier:

Negotiator *

Bedrooms:

Bathrooms:

Receptions:

[Cancel](#) [Continue](#)

Property

4 Appraisal

18 Select the "Occupier".

County *
County Durham

Select country *
UK

Postcode *
DH22HX

[Use Postcode Lookup](#)

Property type: Detached House

Property age: Modern

Occupier: Vendor

Negotiator *

Bedrooms:

Bathrooms:

Receptions:

[Cancel](#) [Continue](#)

Property

4 Appraisal

19 Click the "Negotiator *" field and set the property negotiator.

The screenshot shows a property form with the following fields: County (County Durham), Select country (UK), Postcode (DH22HX), Use Postcode Lookup, Property type (Detached House), Property age (Modern), Occupier (Vendor), and Negotiator (highlighted with an orange circle). Below these are fields for Bedrooms, Bathrooms, and Receptions. At the bottom are Cancel and Continue buttons. On the right, a sidebar shows a progress bar with 'Property' and 'Appraisal' steps.

County *

County Durham

Select country *

UK

Postcode *

DH22HX

[Use Postcode Lookup](#)

Property type

Detached House

Property age

Modern

Occupier

Vendor

Negotiator *

Bedrooms

Bathrooms

Receptions

Cancel

Continue

Property

Appraisal

20 Set the number of Bedrooms, Bathrooms and Reception rooms. Click this number field.

This screenshot is identical to the previous one, but the 'Bedrooms' field is now highlighted with an orange circle. The 'Negotiator' field now contains the text 'Mr Training Dave'.

County *

County Durham

Select country *

UK

Postcode *

DH22HX

[Use Postcode Lookup](#)

Property type

Detached House

Property age

Modern

Occupier

Vendor

Negotiator *

Mr Training Dave

Bedrooms

Bathrooms

Receptions

Cancel

Continue

Property

Appraisal

Property

4 Appraisal

County *

County Durham

Select country *

UK

Postcode *

DH22HX

Use Postcode Lookup

Property type

Detached House

Property age

Modern

Occupier

Vendor

Negotiator *

Mr Training Dave

Bedrooms

3

Bathrooms

1

Receptions

Cancel

Continue

Property

4 Appraisal

County *

County Durham

Select country *

UK

Postcode *

DH22HX

Use Postcode Lookup

Property type

Detached House

Property age

Modern

Occupier

Vendor

Negotiator *

Mr Training Dave

Bedrooms

3

Bathrooms

1

Receptions

1

Cancel

Continue

21 Click "Continue"

County *

County Durham

Select country *

UK

Postcode *

DH22HX

[Use Postcode Lookup](#)

Property type: Detached House

Property age: Modern

Occupier: Vendor

Negotiator *: Mr Training Dave

Bedrooms: 3

Bathrooms: 1

Receptions: 1

Cancel Continue

3 Property

4 Appraisal

22 You will see a summary of the Vendor and Property information.

iam property

My day Lettings Sales Accounts Reporting Communications

Primary Vendor

David Morgan

Address: Same as property

Email: crm.training@iamproperty.com

Mobile phone: 712341212

Branch: Morgan & Co

Phone number: 1865860873

Work phone: 1865860873

Negotiator: Mr Training Dave

Property

7155 Pelaw Crescent Chester le Street County Durham DH22HX

Occupier: Vendor

Bedrooms: 3

Receptions: 1

Property Type: Detached House

Bathrooms: 1

1 Primary Vendor

Appointment

23 Click "Assignee(s)" and set the negotiator conducting the Appraisal."

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My day Lettings Sales Accounts Reporting Communications

Appointment

Appointment title *
Appraisal @ 7155 Pelaw Crescent DH22HX

Assignee(s) *
VTUK USER
Mr David-George Morgan
Mr Training Dave
Mr James Morgan
Ian Johnson
Miss Brooke Morgan

Start date *
28/03/2025

Start time *
08:18

Add to calendar?
☒ Yes ☐ No

Confirmed?
☒ Yes ☐ No

Internal notes

2 Secondary Ver
3 Property
4 Appraisal

24 Click the "Start date *" field and set the appointment date.

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My day Lettings Sales Accounts Reporting Communications

Appointment

Appointment title *
Appraisal @ 7155 Pelaw Crescent DH22HX

Assignee(s) *
Mr Training Dave X

Start date *
28/03/2025

Start time *
08:18

Duration *
30 Mins

Add to calendar?
☒ Yes ☐ No

Confirmed?
☒ Yes ☐ No

Internal notes

2 Secondary Ver
3 Property
4 Appraisal

25 Click the "Start time *" field to set the appointment start time.

The screenshot shows the 'Appointment' form in the 'iam property' system. The form includes fields for 'Appointment title *', 'Assignee(s) *', 'Start date *', 'Start time *', and 'Duration *'. The 'Start time' field is highlighted with an orange circle. To the right of the form is a vertical sidebar with steps: 2 Secondary Ver, 3 Property, and 4 Appraisal.

Appointment

Appointment title *
Appraisal @ 7155 Pelaw Crescent DH22HX

Assignee(s) *
Mr Training Dave X

Start date *
30/03/2025

Start time *
08:18

Duration *
30 Mins

Add to calendar?
☒ Yes ☐ No

Confirmed?
☒ Yes ☐ No

Internal notes

26 Click "Duration" to set the length of the appointment.

The screenshot shows the 'Appointment' form in the 'iam property' system. The 'Duration' field is highlighted with an orange circle, and a dropdown menu is open showing various duration options. The 'Start time' field is now filled with '11:18'. To the right of the form is a vertical sidebar with steps: 2 Secondary Vendor, 3 Property, and 4 Appraisal.

Appointment

Appointment title *
Appraisal @ 7155 Pelaw Crescent DH22HX

Assignee(s) *
Mr Training Dave X

Start date *
30/03/2025

Start time *
11:18

Duration *
30 Mins

Add to calendar?
☒ Yes ☐ No

Confirmed?
☒ Yes ☐ No

Internal notes

- 15 Mins
- 30 Mins
- 45 Mins
- 1 Hour
- 1 Hour 15 Mins
- 1 Hour 30 Mins
- 1 Hour 45 Mins
- 2 Hours

27 Click "Yes" or "No" to add to the calendar.

Appointment

Appointment title * Assignee(s) *

Appraisal @ 7155 Pelaw Crescent DH22HX Mr Training Dave X

Start date * Start time * Duration *

30/03/2025 11:18 30 Mins

Add to calendar?

☒ Yes ☐ No

Confirmed?

☒ Yes ☐ No

Internal notes

- 2 Secondary Ver
- 3 Property
- 4 Appraisal

28 Click "Yes" or "No" to confirm the appointment in the calendar.

Appointment

Appointment title * Assignee(s) *

Appraisal @ 7155 Pelaw Crescent DH22HX Mr Training Dave X

Start date * Start time * Duration *

30/03/2025 11:18 30 Mins

Add to calendar?

☒ Yes ☐ No

Confirmed?

☒ Yes ☐ No

Internal notes

- 2 Secondary Ver
- 3 Property
- 4 Appraisal

- 29 Click this field and add any notes you want to show in the Appraisal appointment.

Appointment

Appointment title * Assignee(s) *

Appraisal @ 7155 Pelaw Crescent DH22HX Mr Training Dave X

Start date * Start time * Duration *

30/03/2025 11:18 30 Mins

Add to calendar?

☒ Yes ☐ No

Confirmed?

☒ Yes ☐ No

Internal notes

- 2 Secondary Ver
- 3 Property
- 4 Appraisal

- 30 Click "Create appointment"

Appointment title * Assignee(s) *

Appraisal @ 7155 Pelaw Crescent DH22HX Mr Training Dave X

Start date * Start time * Duration *

30/03/2025 11:18 30 Mins

Add to calendar?

☒ Yes ☐ No

Confirmed?

☒ Yes ☐ No

Internal notes

Add any notes to help appraisal.

Cancel Create Appointment

- 3 Property
- 4 Appraisal

Success

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This screen is a summary of the information added, clicking the "View..." buttons will take you to the appropriate area of the CRM.

