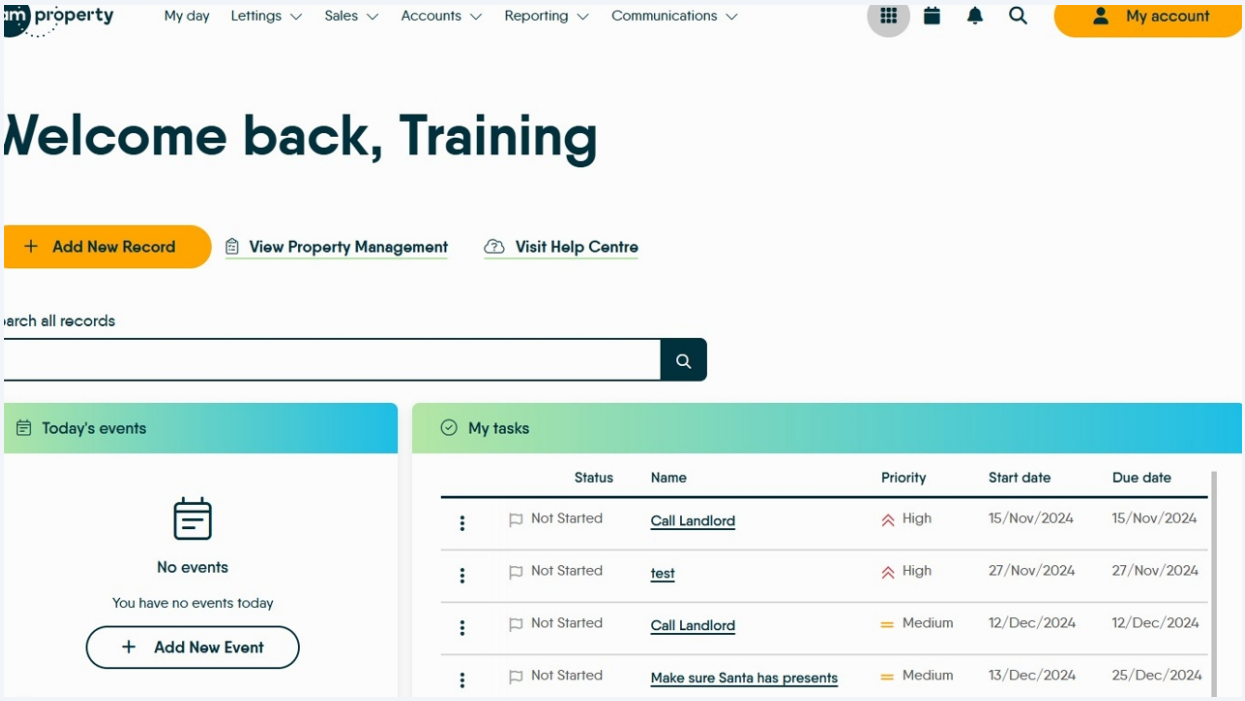
Core Process Simplification - Adding a Sales/Lettings Appraisal in CRM

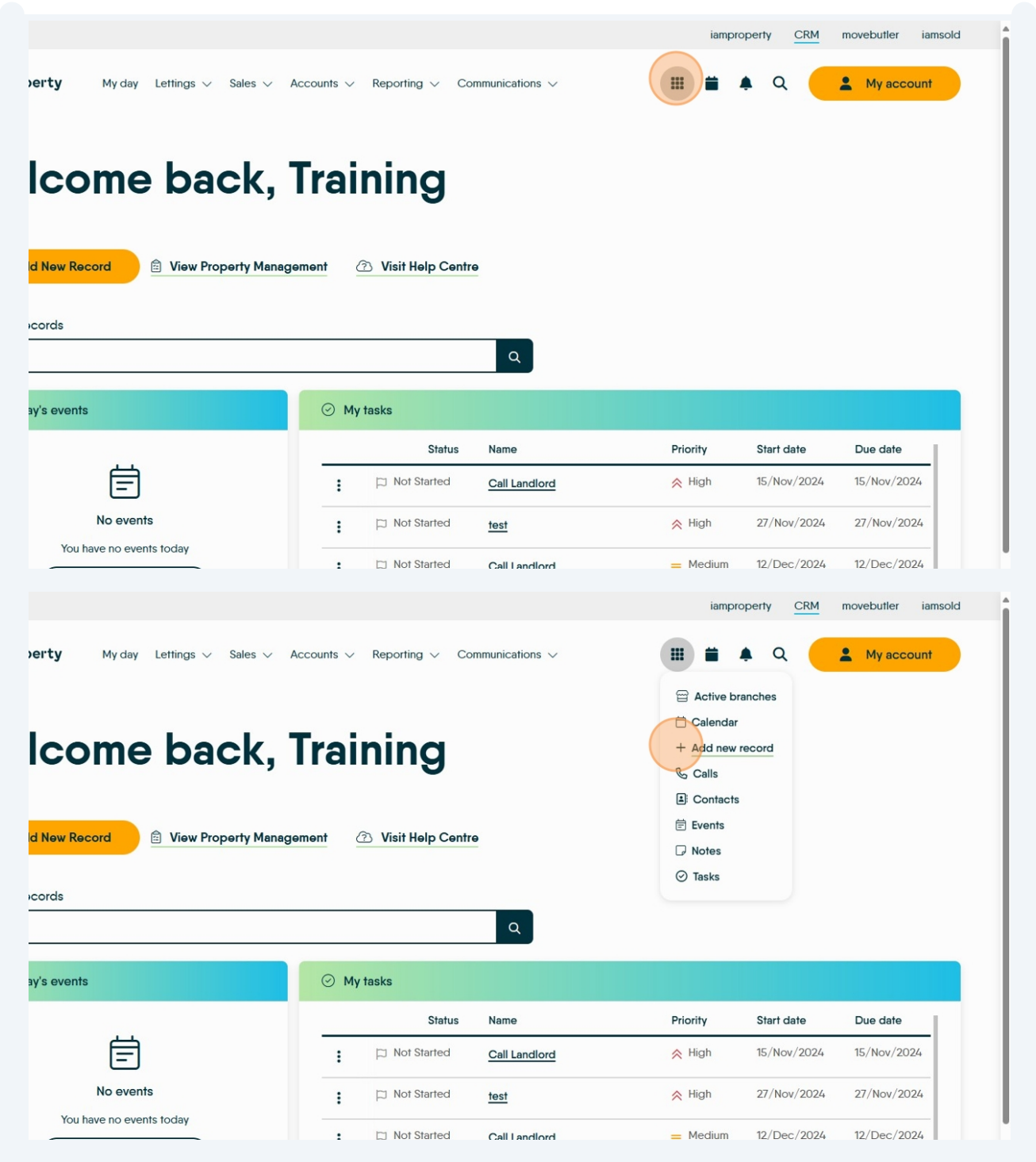
This guide provides a step-by-step process for adding a new sales or letting appraisal record efficiently in the iamproperty CRM system.

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.

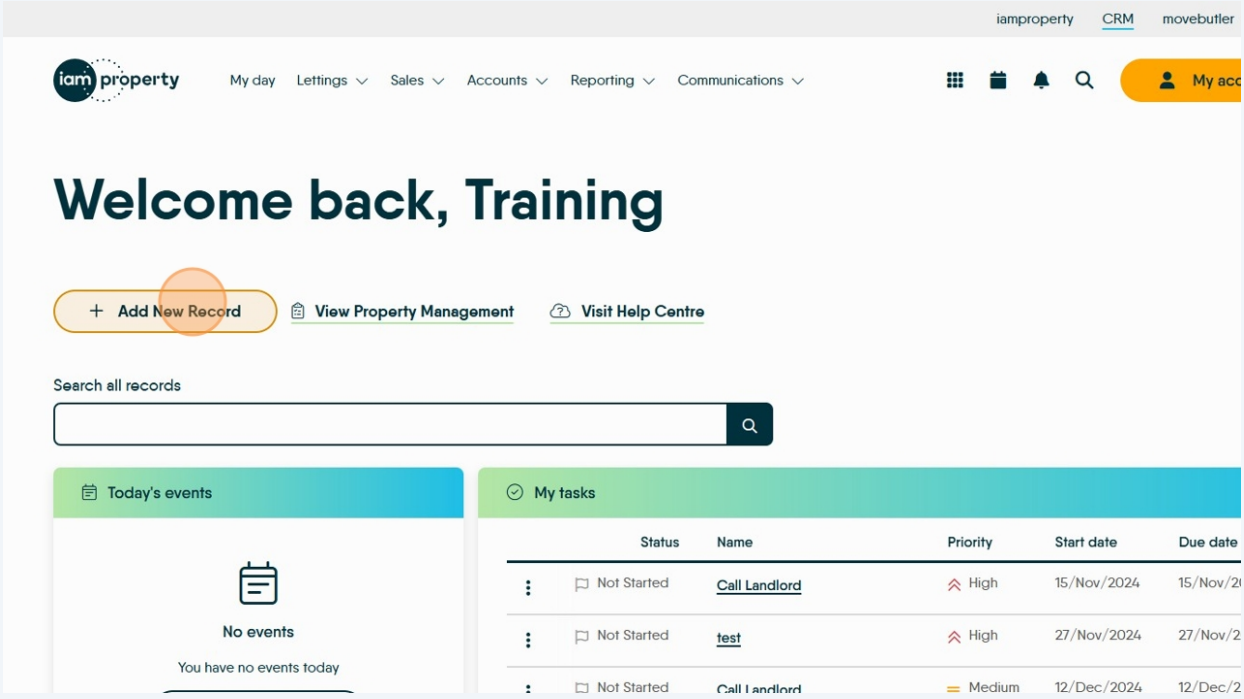
1 Navigate to https://crm.iamproperty.com/MyDay



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

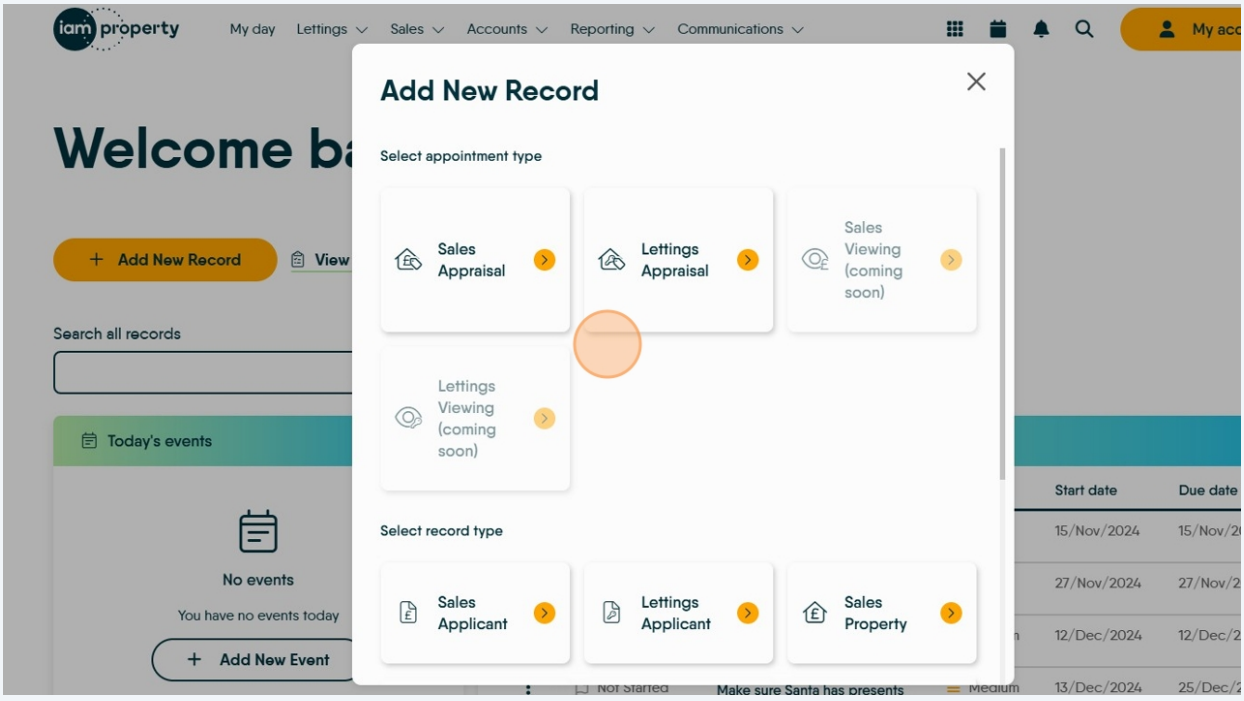

iamproperty
CRM
movebutler
iamsold
My day
Lettings
Sales
Accounts
Reporting
Communications
My account
lcome back, Training
d New Record
View Property Management
Visit Help Centre
ecords
y's events
No events
You have no events today
My tasks
Status
Name
Priority
Start date
Due date
Not Started
Call Landlord
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"

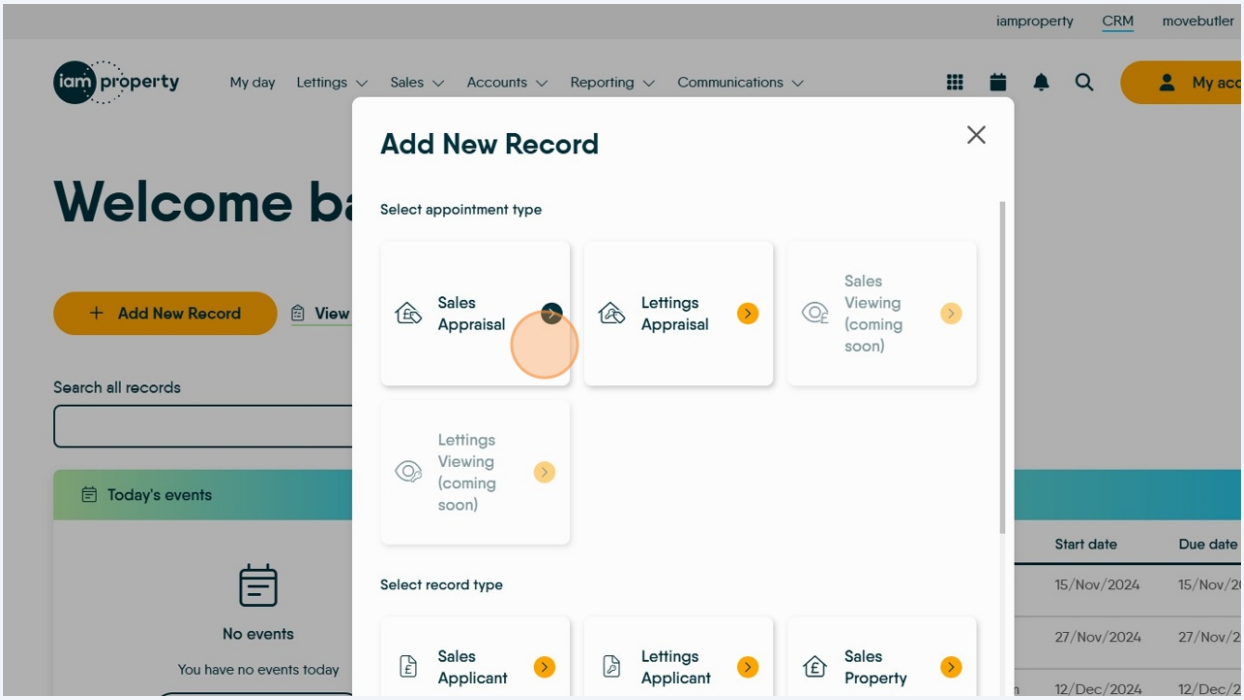


4 Click either "Sales Appraisal" or "Lettings Appraisal" as required.

For this example we are using Sales Appraisal.

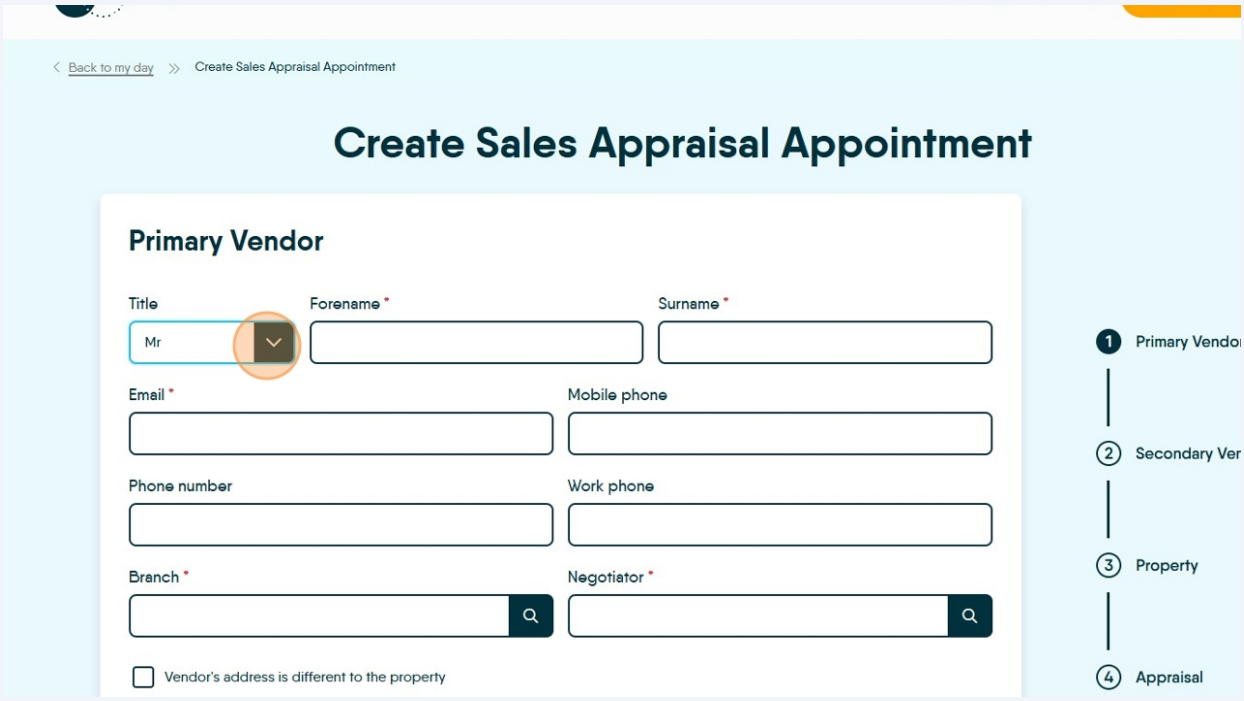


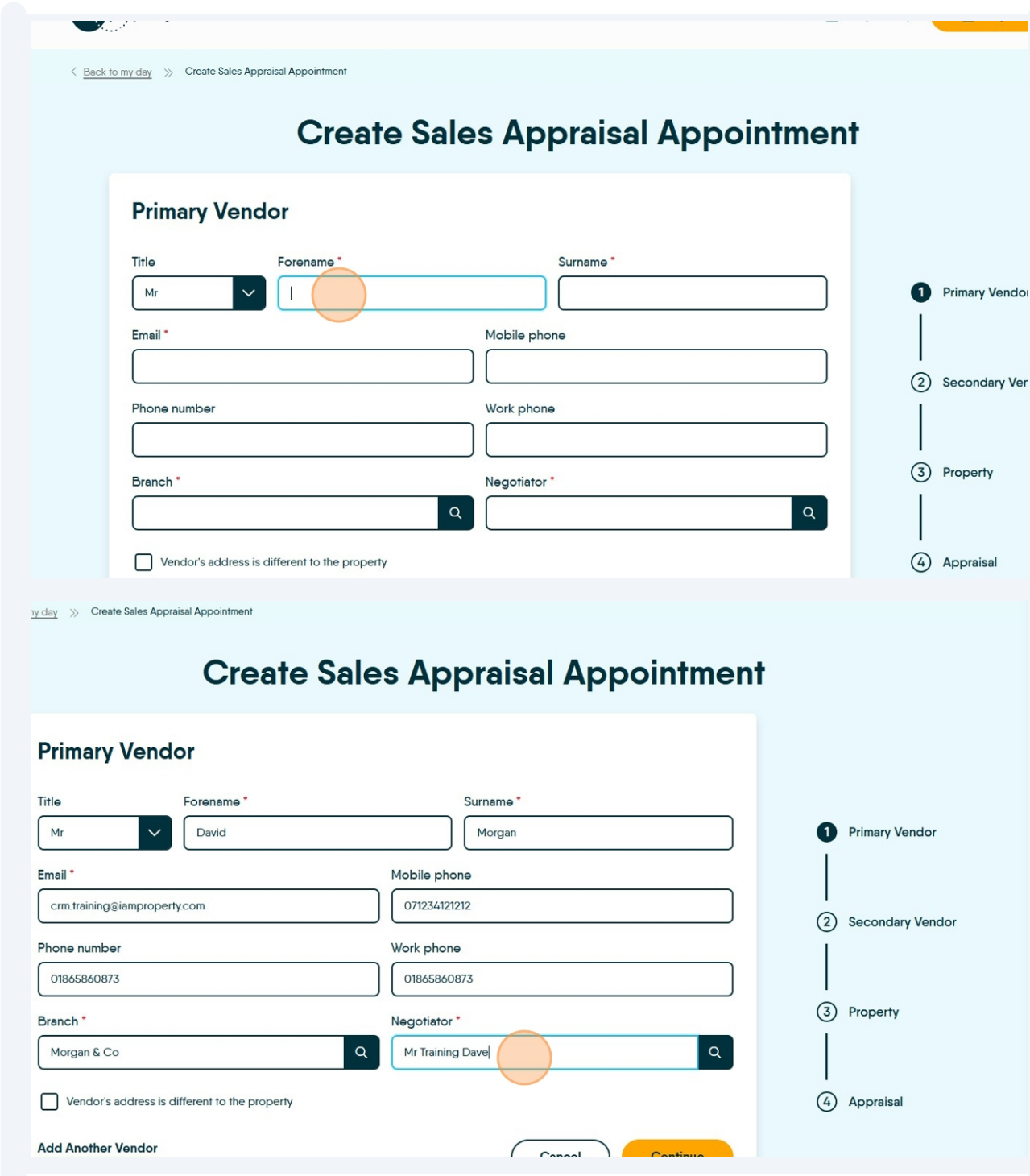
5 Click "Sales Appraisal"

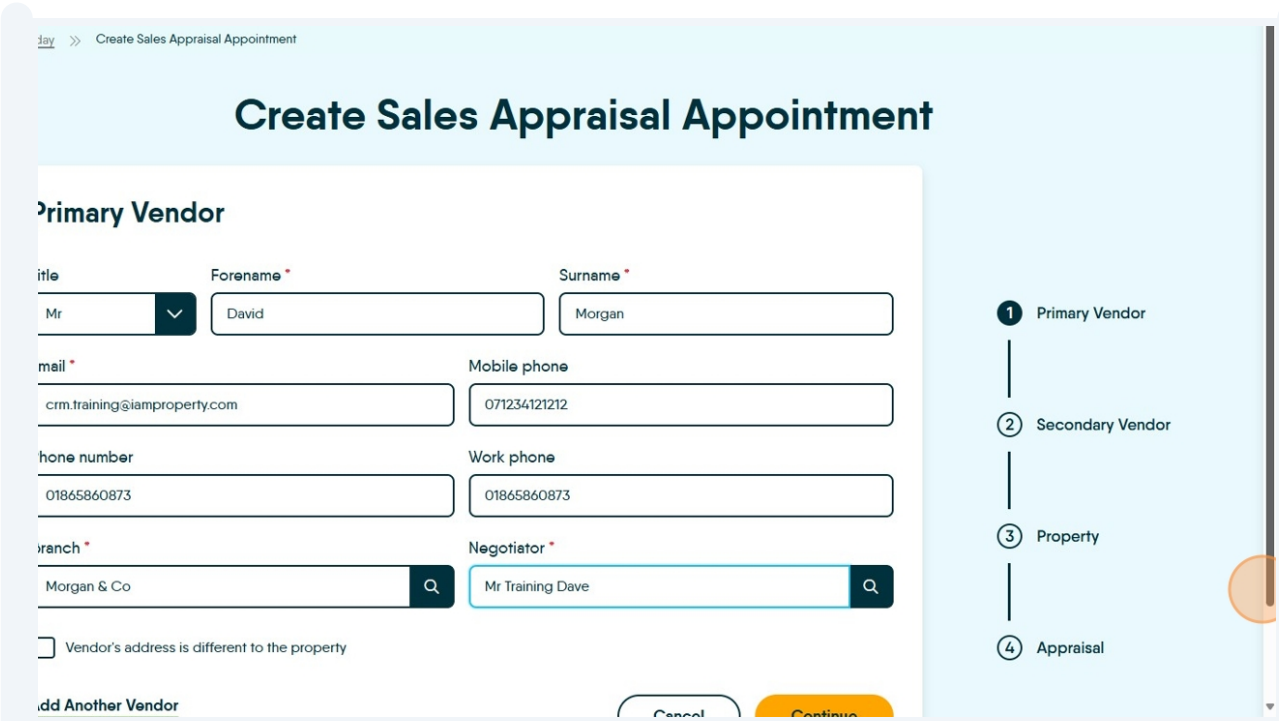


Vendor/Landlord

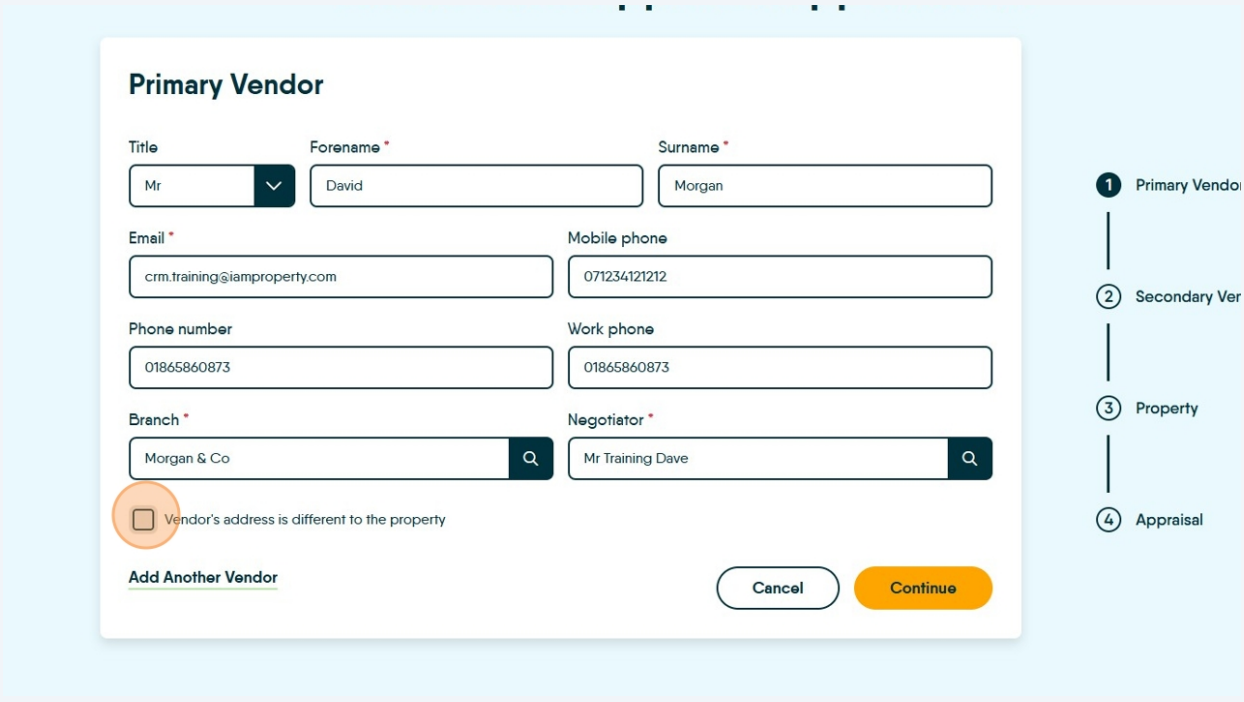
6 Complete all the details for the Primary Vendor. Then set the Branch and Negotiator details.



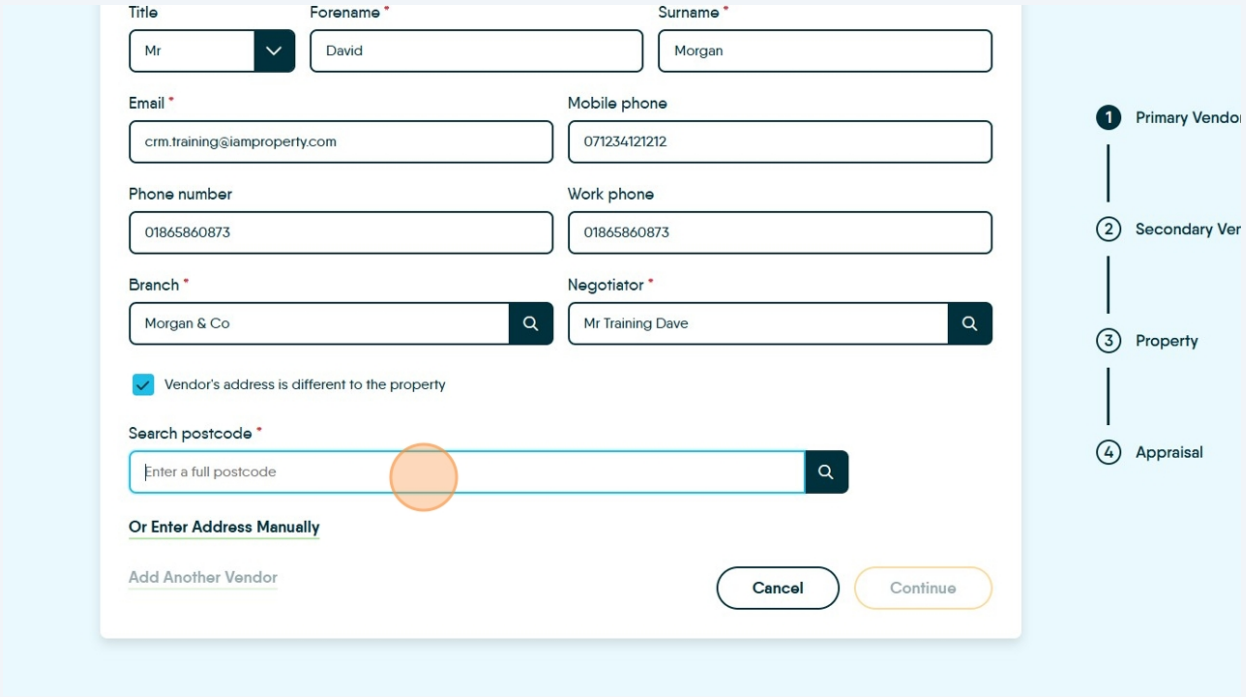

Back to my day
Create Sales Appraisal Appointment
Create Sales Appraisal Appointment
Primary Vendor
Title
Mr
Forename *
Surname *
Email *
Mobile phone
Phone number
Work phone
Branch *
Negotiator *
Vendor's address is different to the property
1 Primary Vendor
2 Secondary Ver
3 Property
4 Appraisal
Create Sales Appraisal Appointment
Primary Vendor
Title
Mr
Forename *
David
Surname *
Morgan
Email *
crm.training@iamproperty.com
Mobile phone
071234121212
Phone number
01865860873
Work phone
01865860873
Branch *
Morgan & Co
Negotiator *
Mr Training Dave
Vendor's address is different to the property
Add Another Vendor
1 Primary Vendor
2 Secondary Vendor
3 Property
4 Appraisal



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

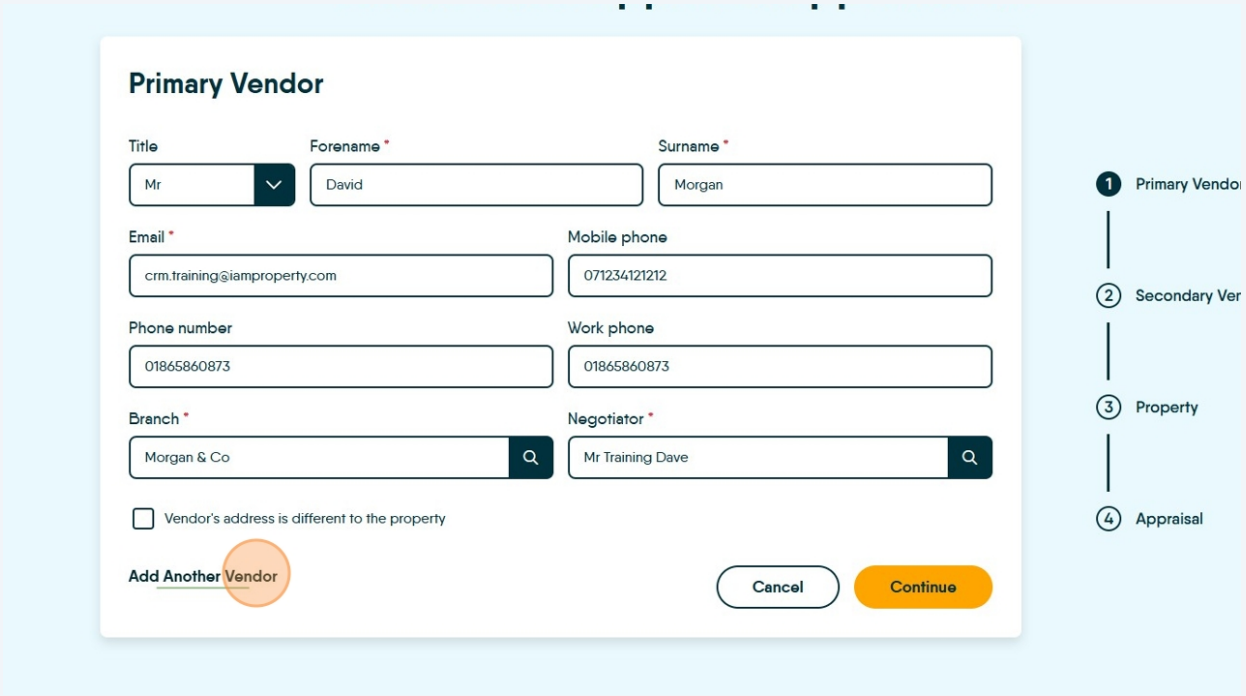


8 Either click the "Search postcode *" field, or, the "Enter Address Manually" option and add the Vendors address. This is only required if the Vendor is not selling their primary residence.

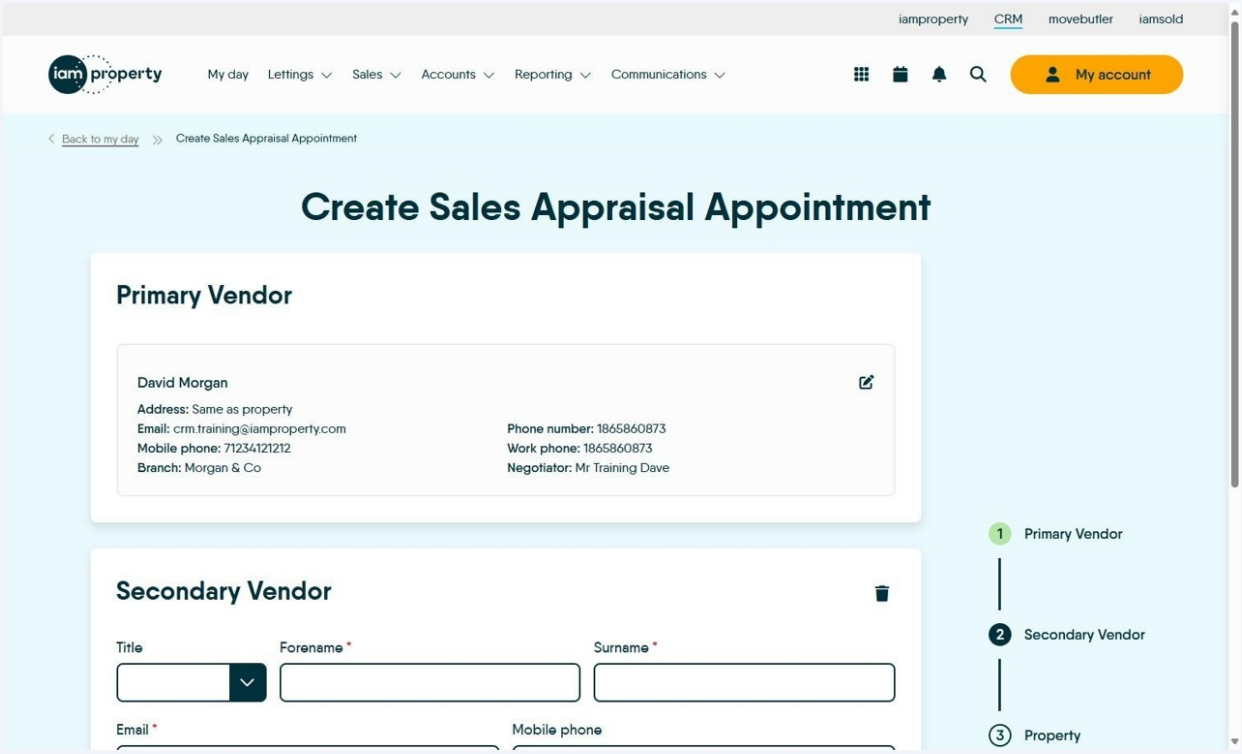


9 If there are multiple vendors click "Add another vendor" to add a second vendor.

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



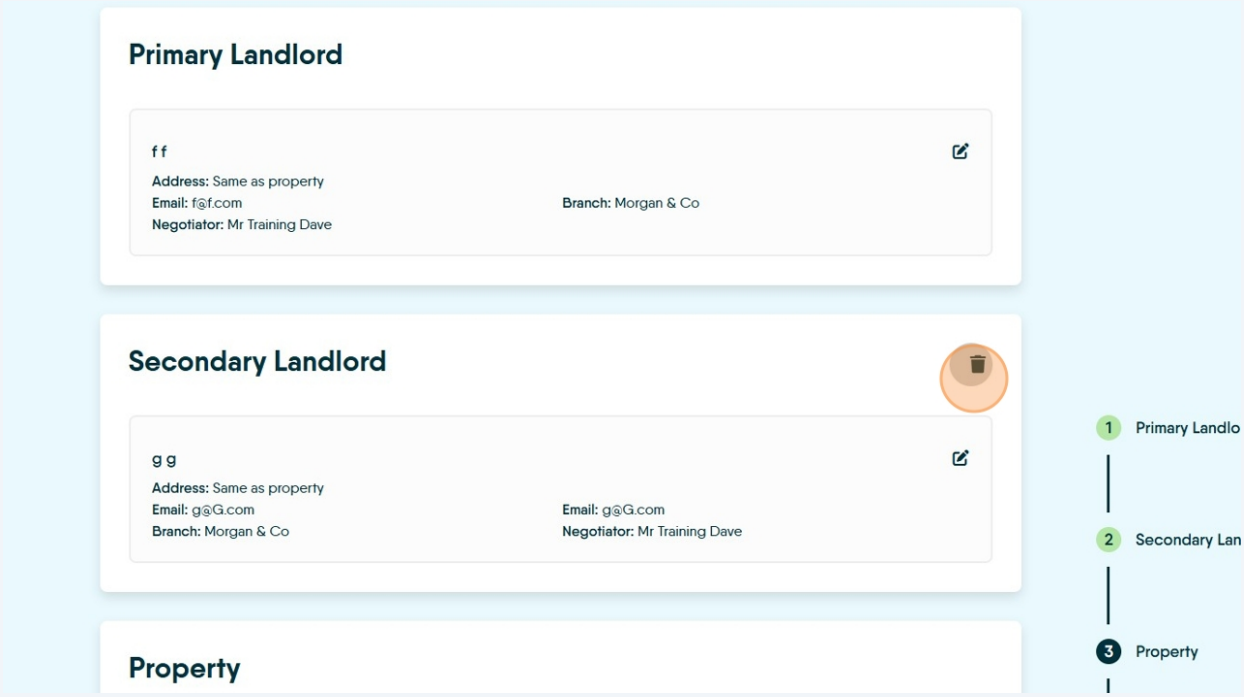
10 Adding the Secondary Vendor is the same as creating a primary.



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

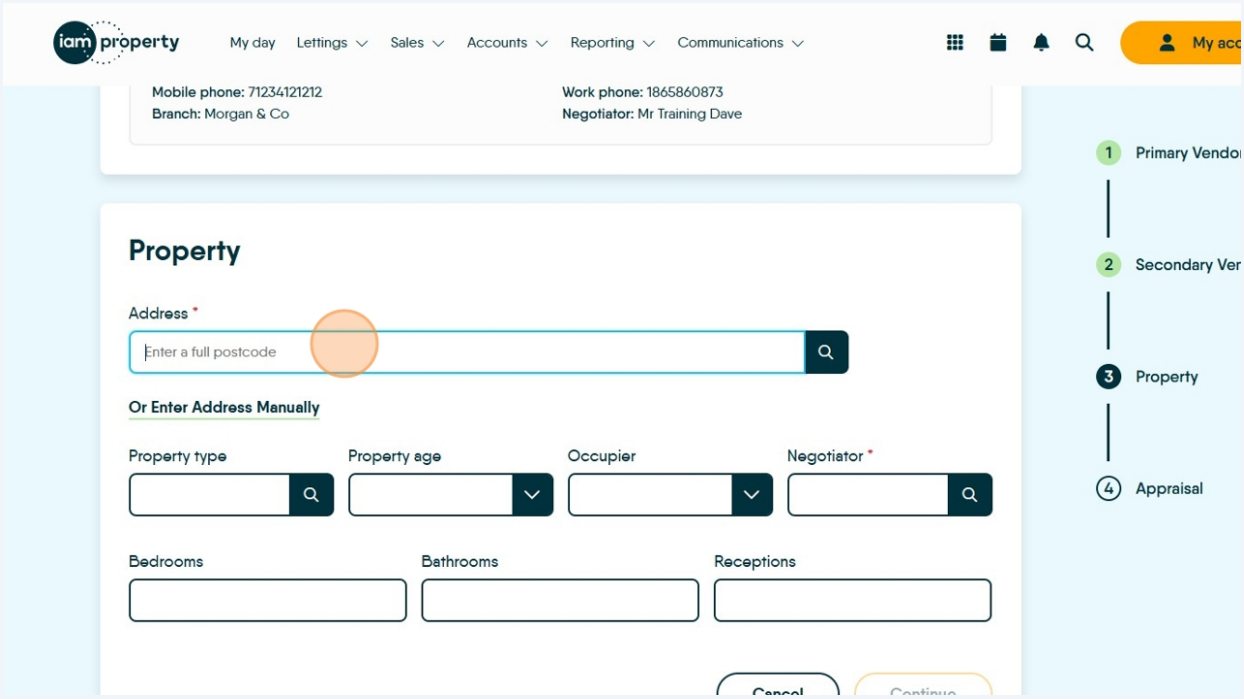
iamproperty
CRM
movebutler
iamsold
iam property
My day
Lettings
Sales
Accounts
Reporting
Communications
My account
Secondary Vendor
Title
Forename *
Surname *
Email *
Mobile phone
Phone number
Work phone
Branch *
Negotiator *
Vendor's address is different to the property
Cancel
Continue
1 Primary Vendor
2 Secondary Vendor
3 Property
4 Appraisal
Mobile phone: 71234121212
Work phone: 1865860873
Branch: Morgan & Co
Negotiator: Mr Training Dave
Property
Address *
Enter a full postcode
Or Enter Address Manually
Property type
Property age
Occupier
Negotiator *
Bedrooms
Bathrooms
Receptions
Cancel
Continue
1 Primary Vendor
2 Secondary Vend
3 Property
4 Appraisal

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

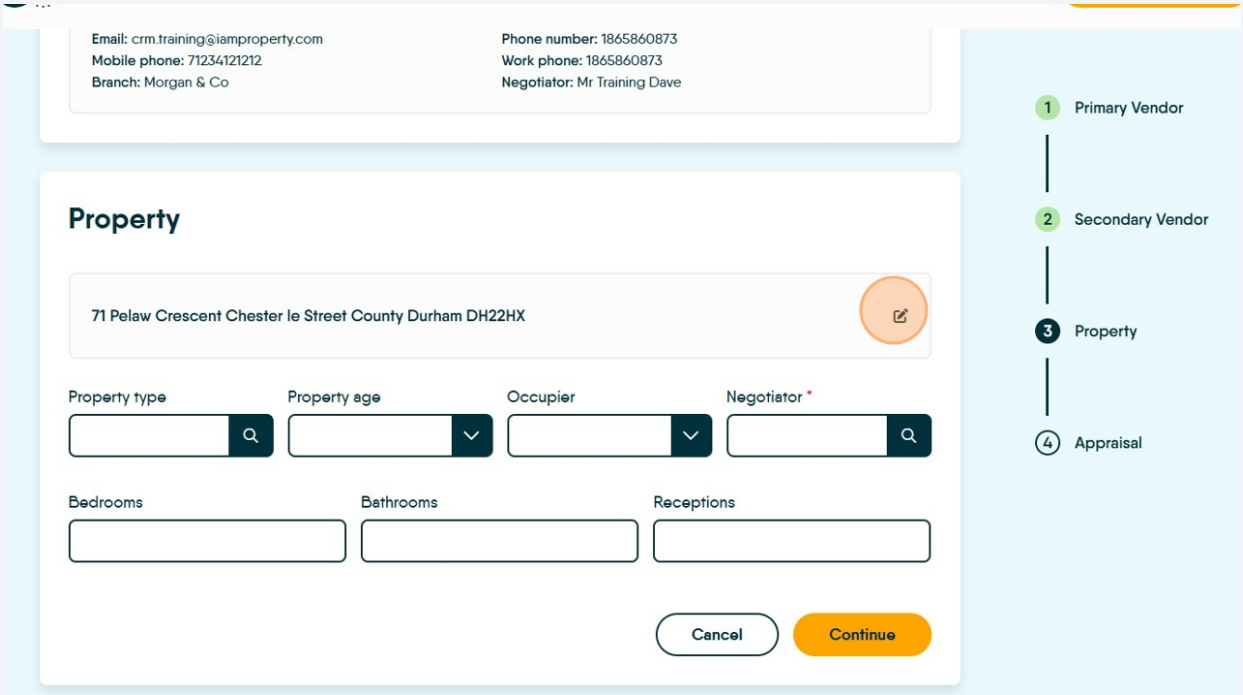


Property

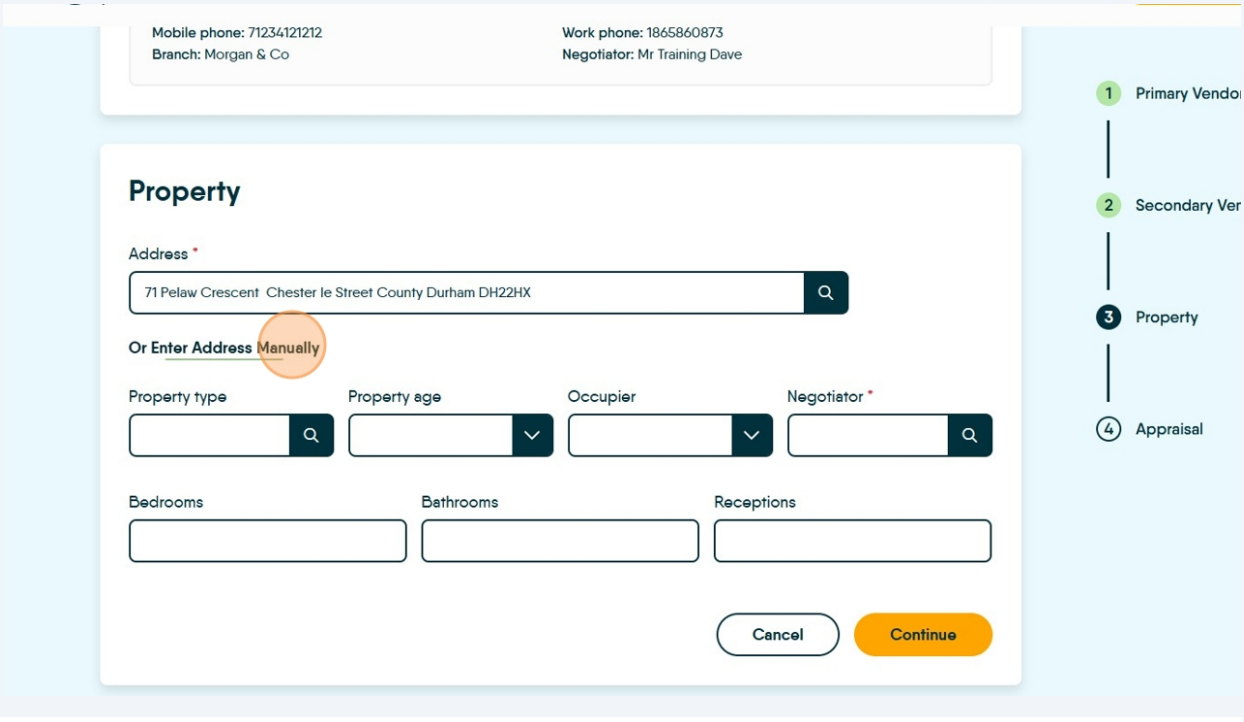
13 Click the "Address *" field and add the postcode

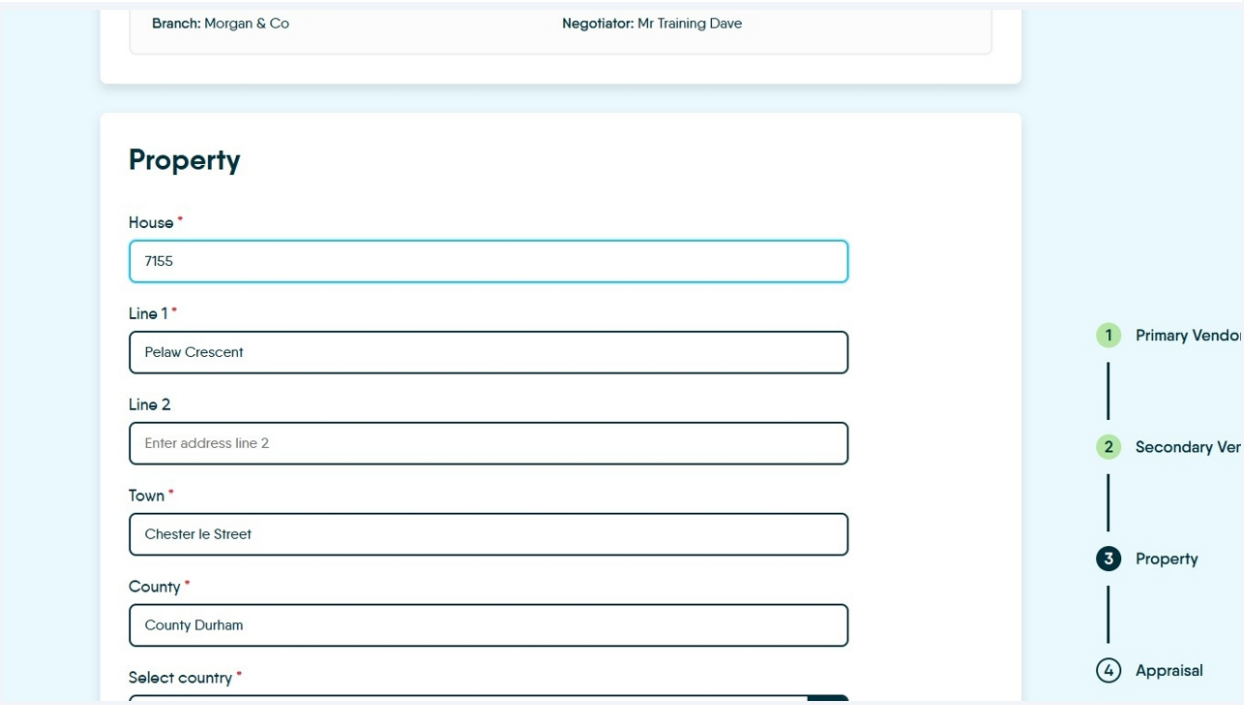


14 Click here to edit the address if required.

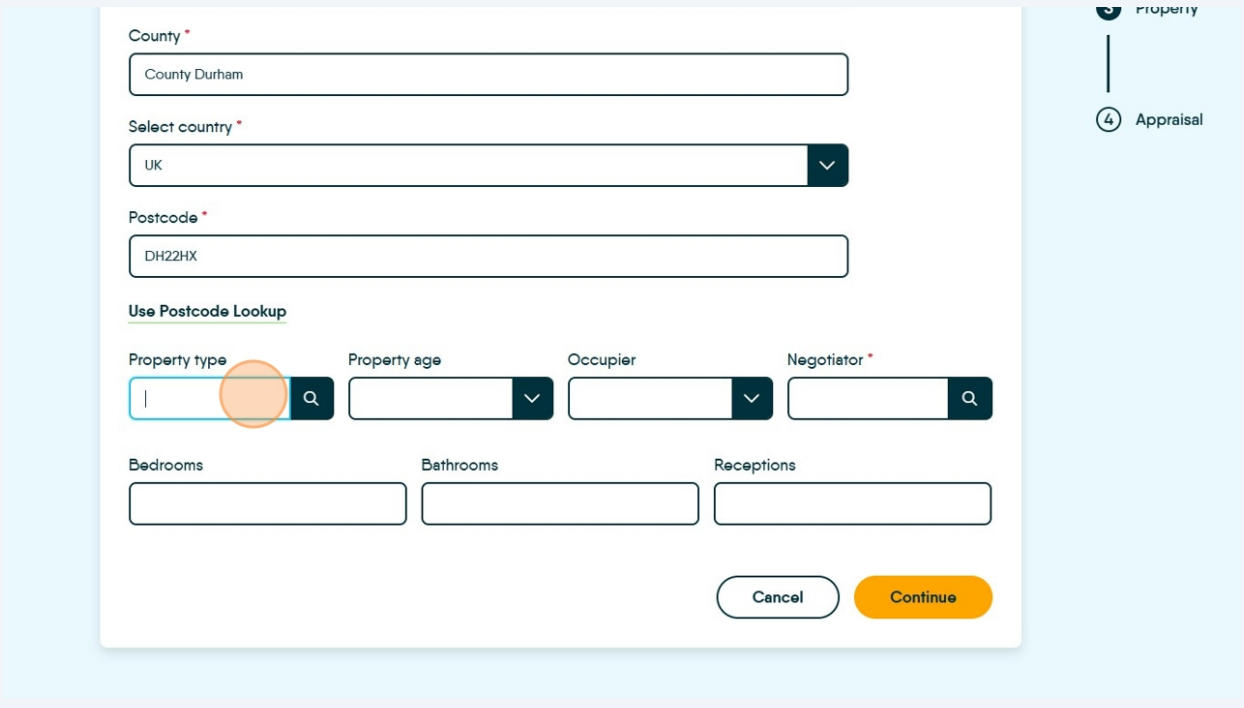


15 Click "Or enter address manually"

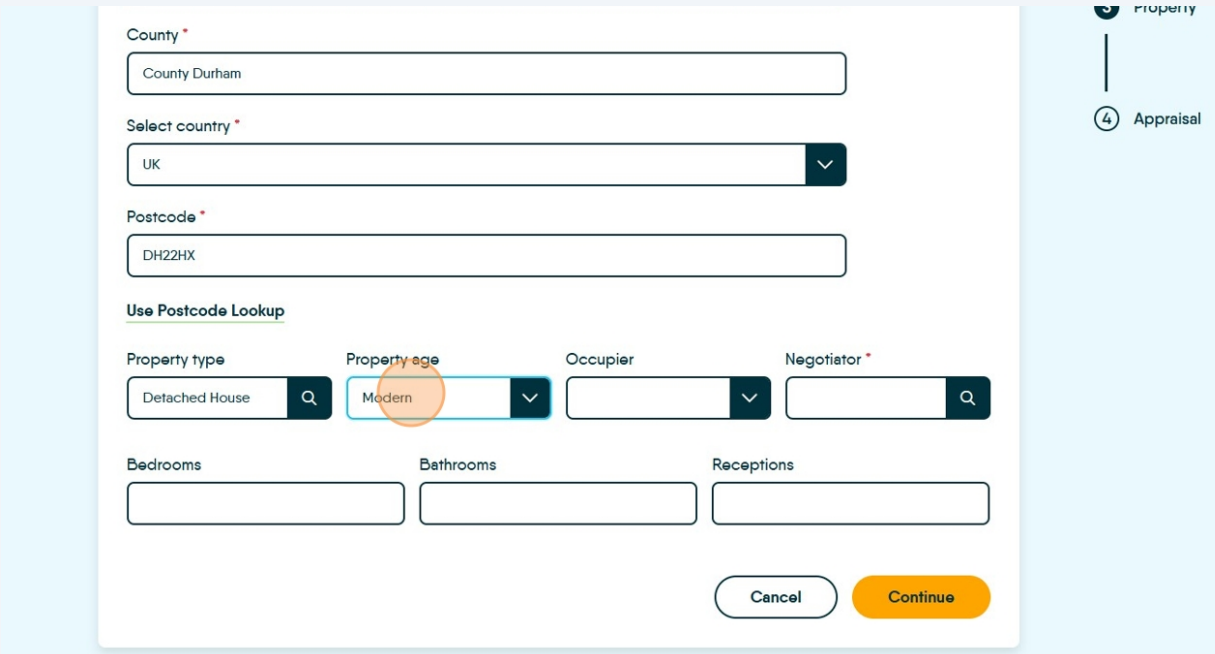




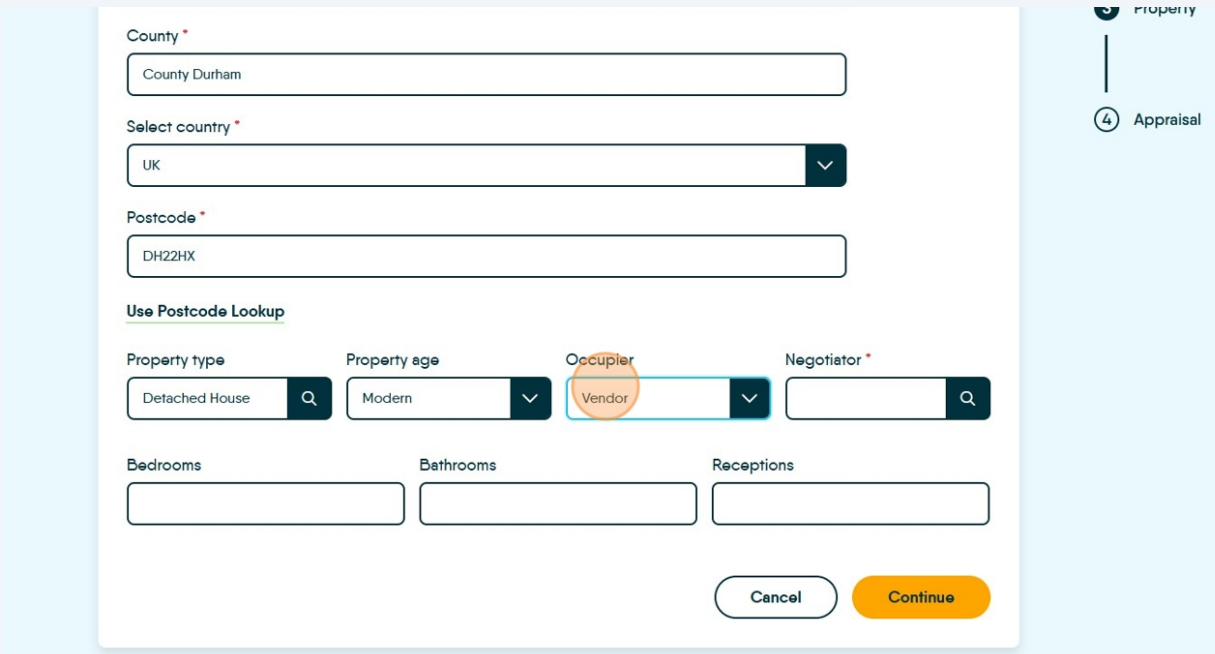
16 Click the "Property type" field and set the property type from the drop down menu.



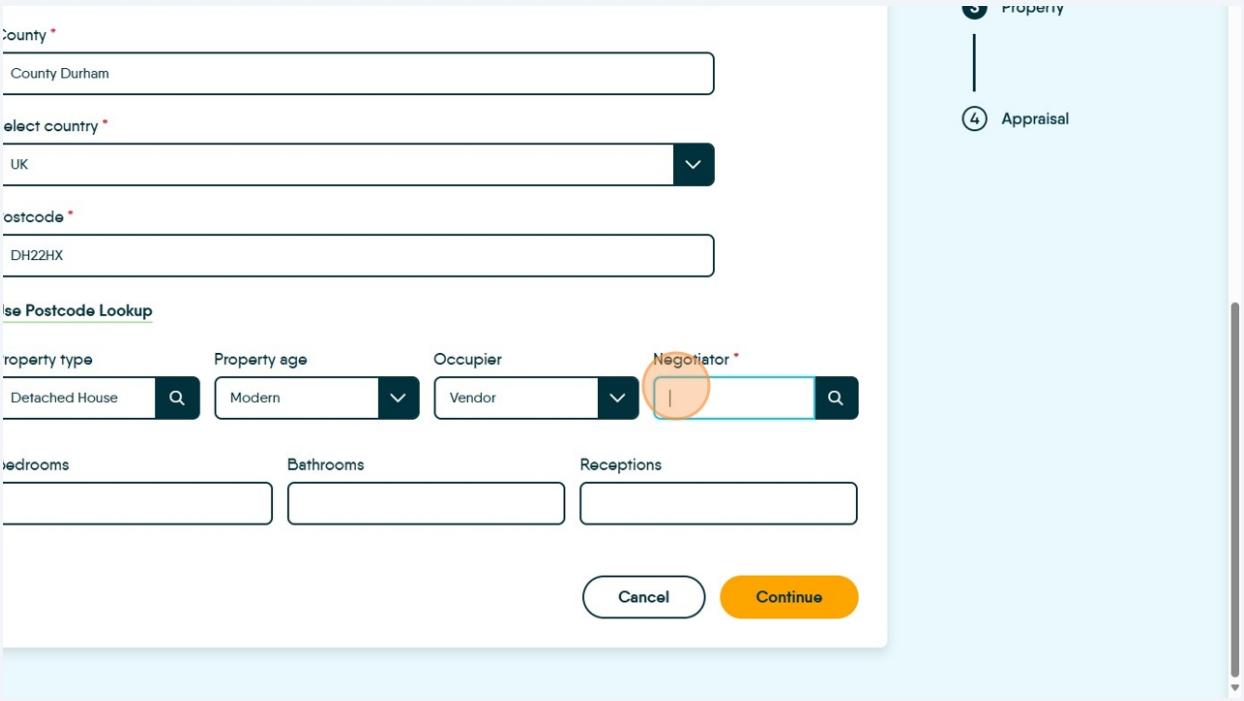
17 Select the "Property Age"



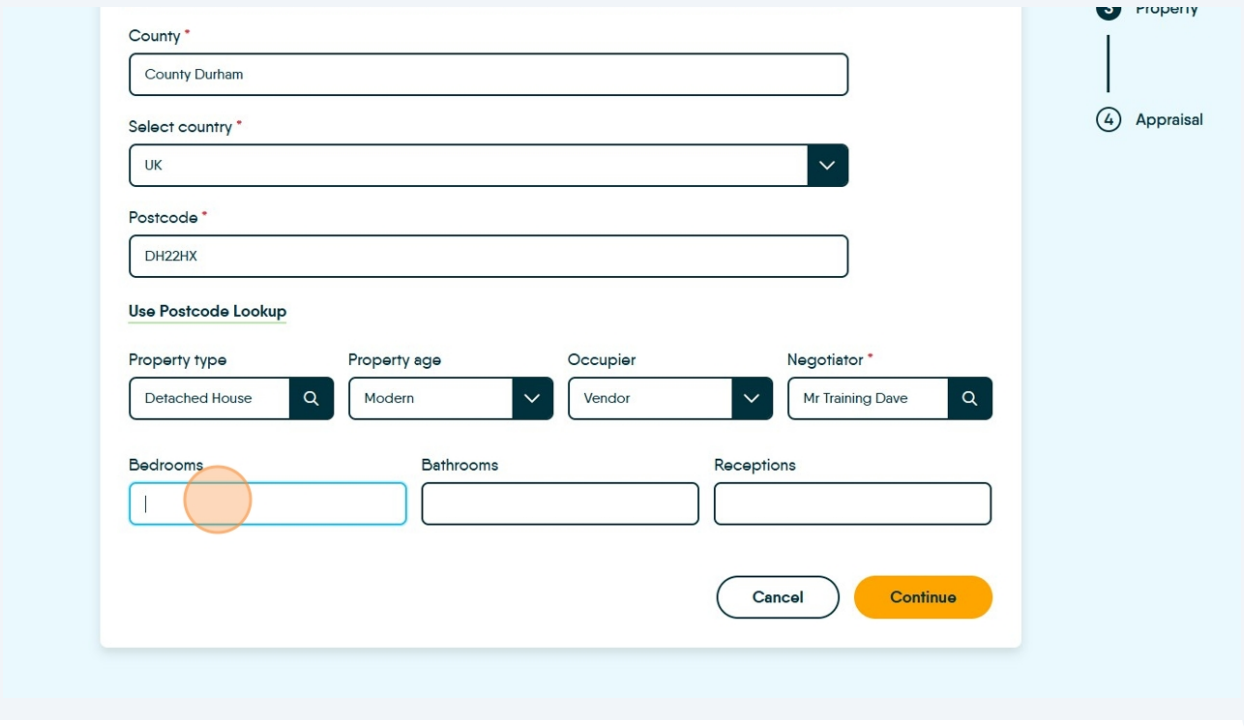
18 Select the "Occupier".

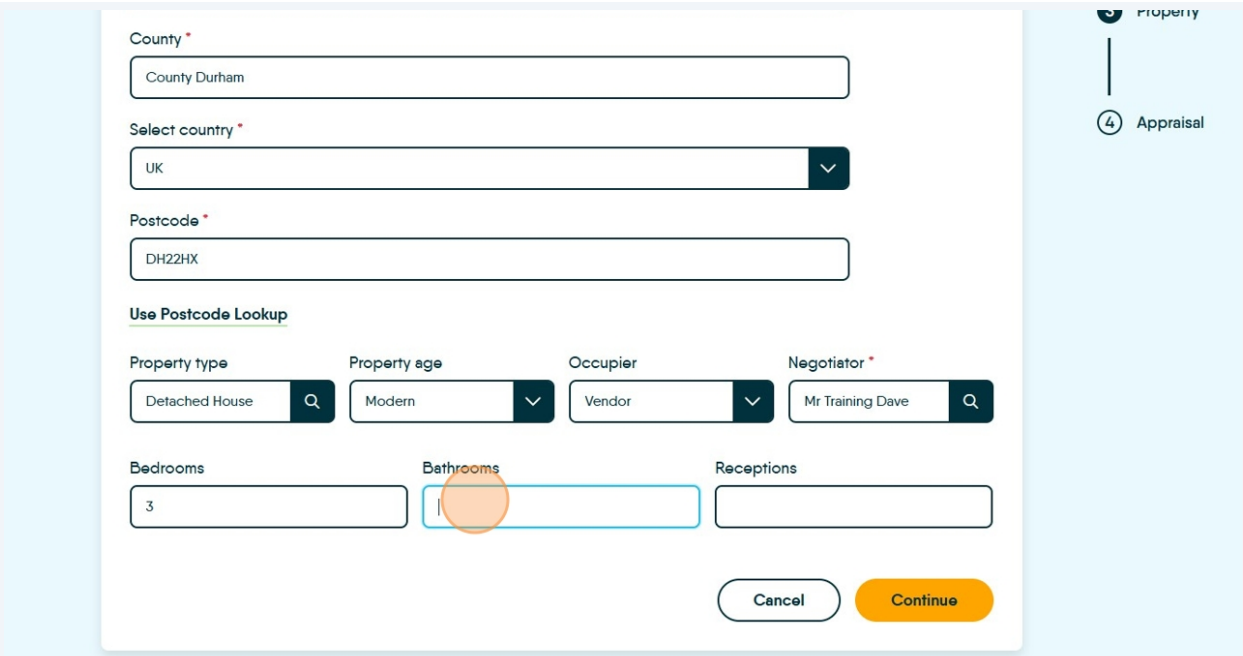


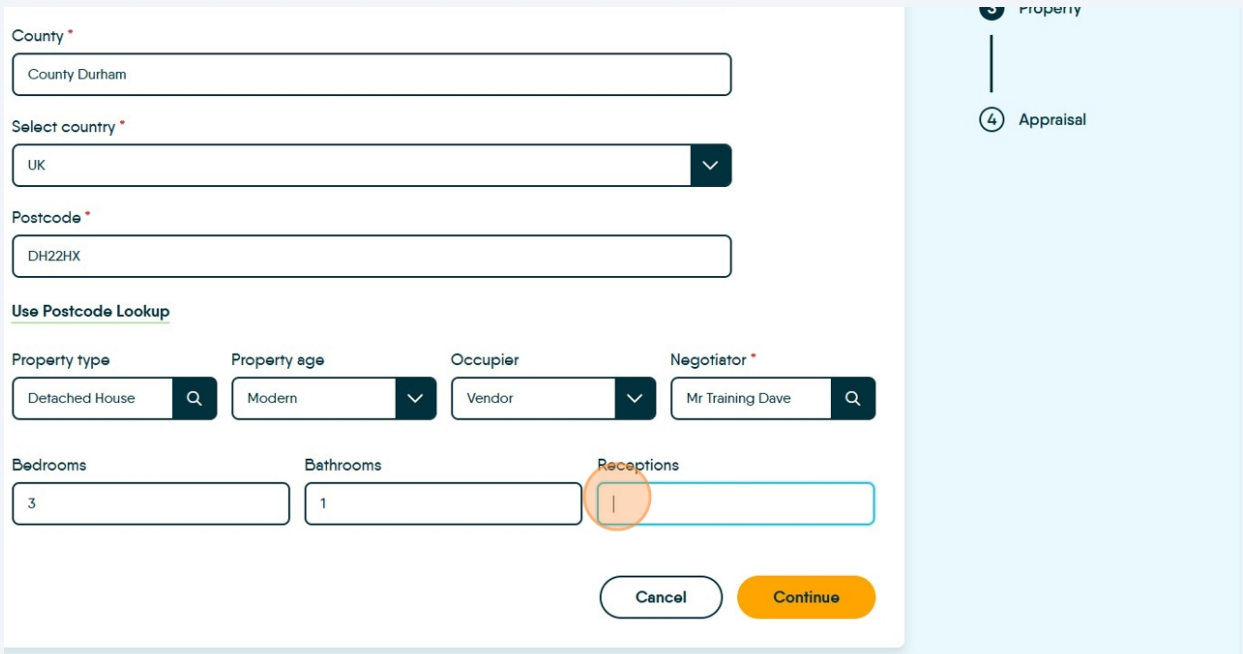
19 Click the "Negotiator *" field and set the property negotiator.



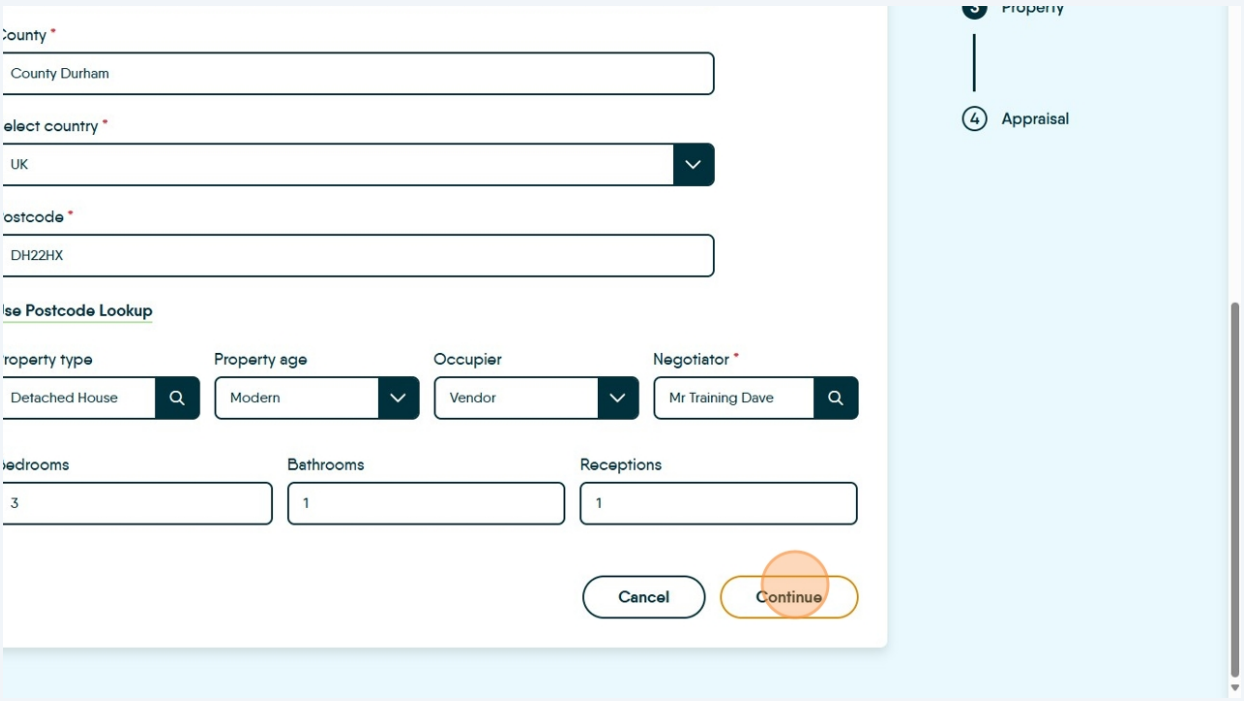
20 Set the number of Bedrooms, Bathrooms and Reception rooms.
Click this number field.



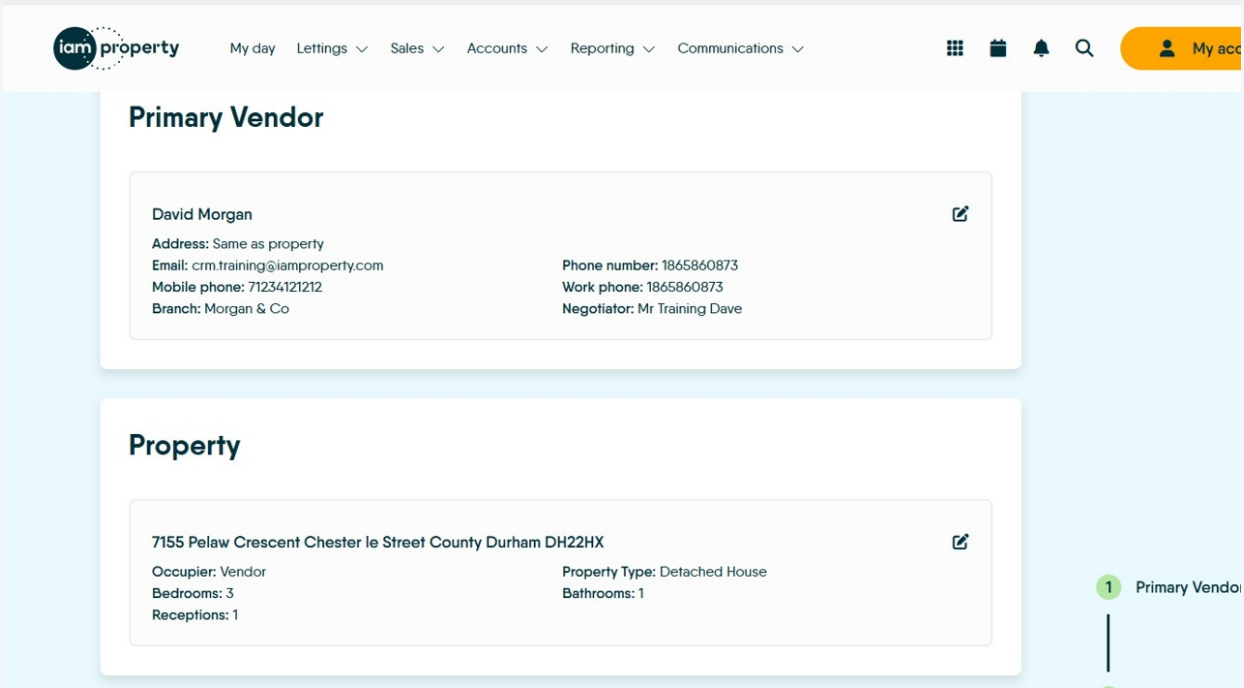

County *
County Durham
Select country *
UK
Postcode *
DH22HX
Use Postcode Lookup
Property type
Detached House
Property age
Modern
Occupier
Vendor
Negotiator *
Mr Training Dave
Bedrooms
3
Bathrooms
Receptions
Cancel
Continue
4 Appraisal


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
4 Appraisal

21 Click "Continue"

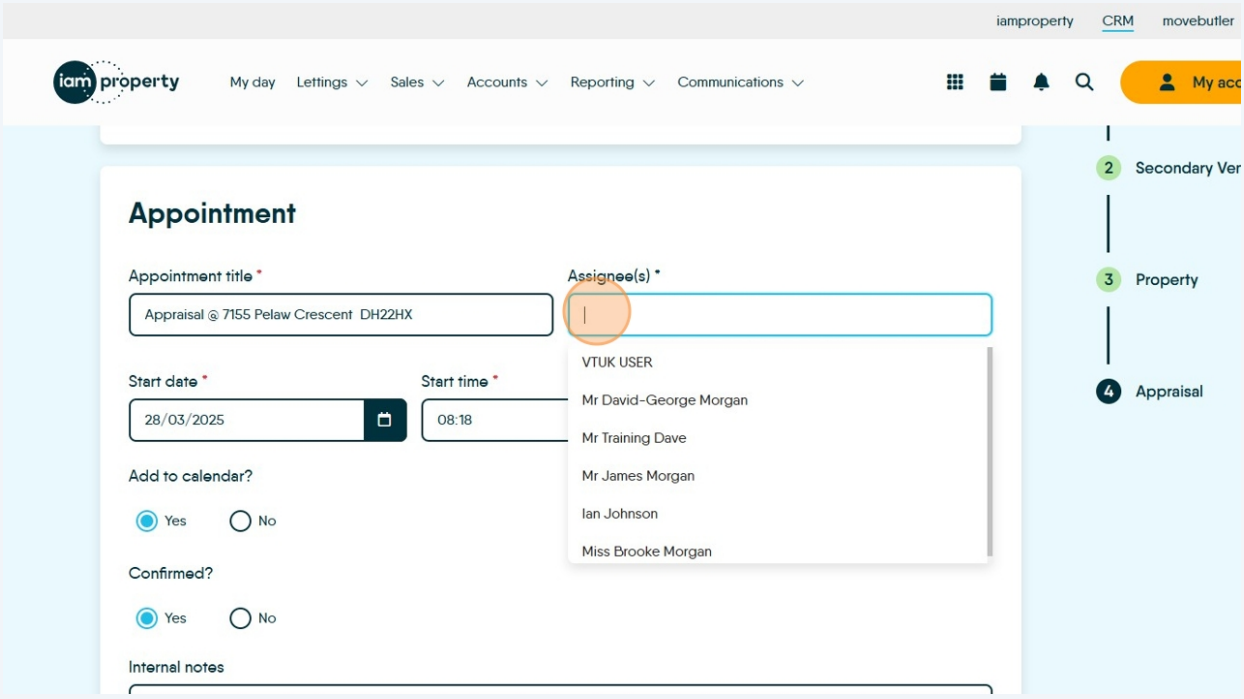


22 You will see a summary of the Vendor and Property information.

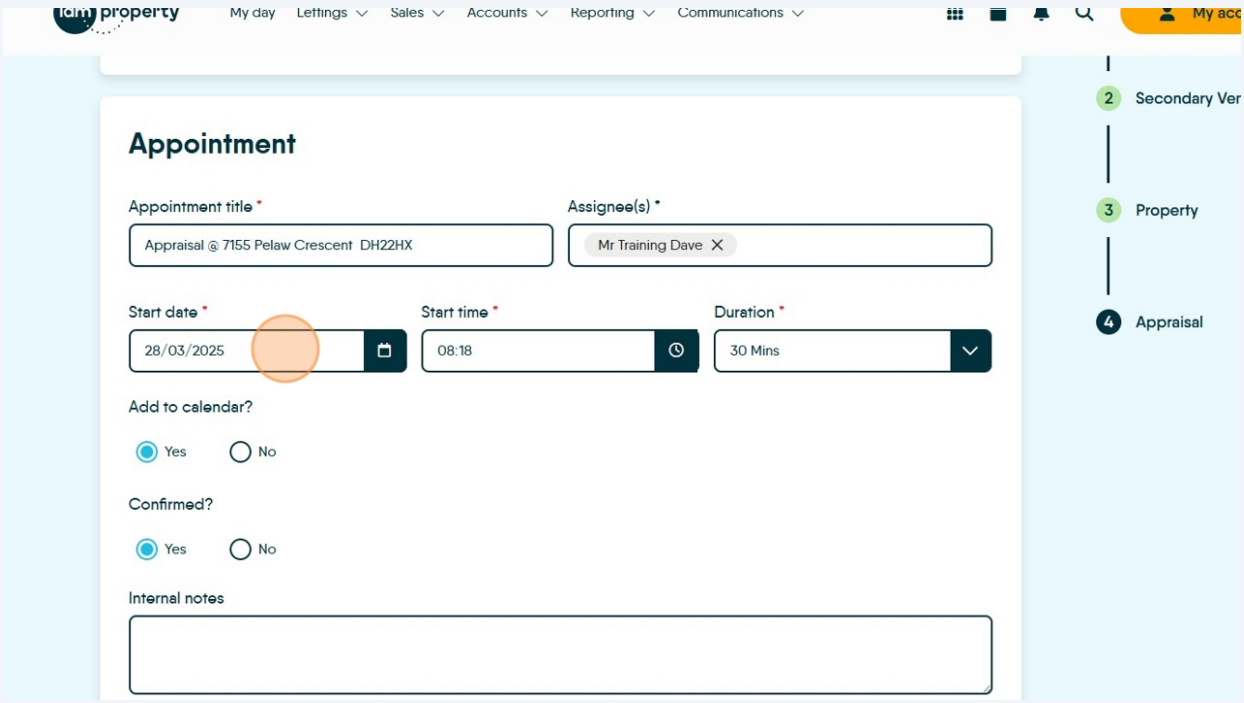


Appointment

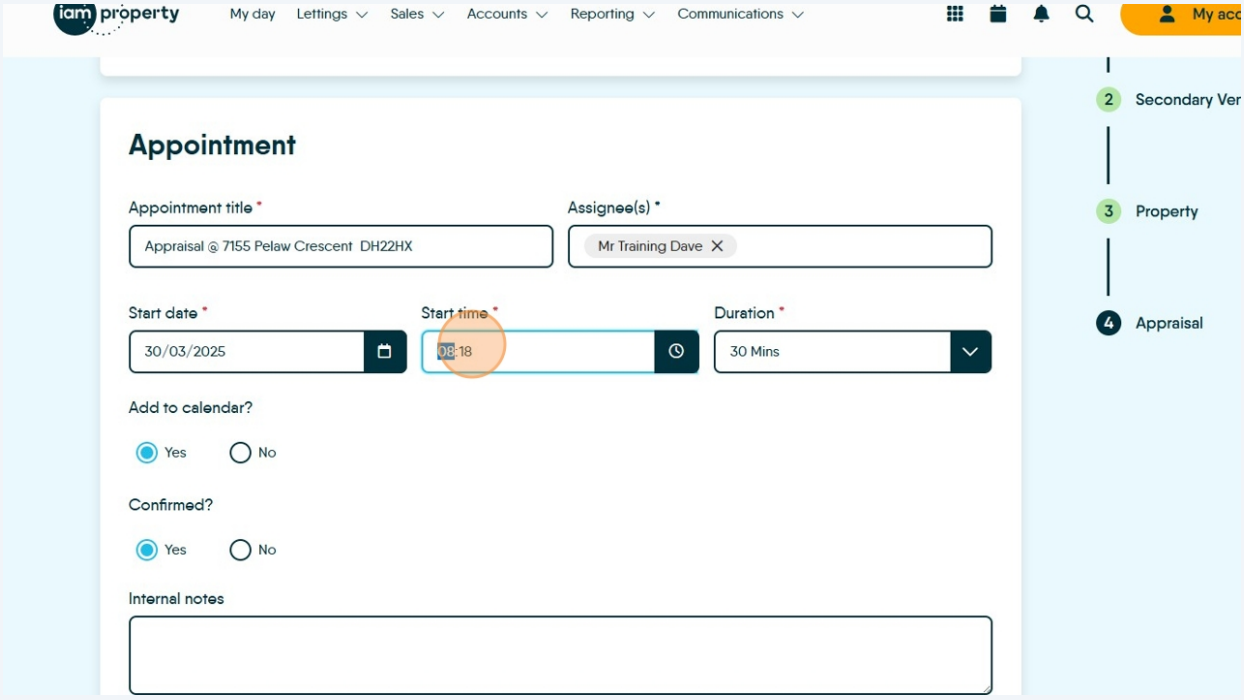
23 Click "Assignee(s)" and set the negotiator conducting the Appraisal."



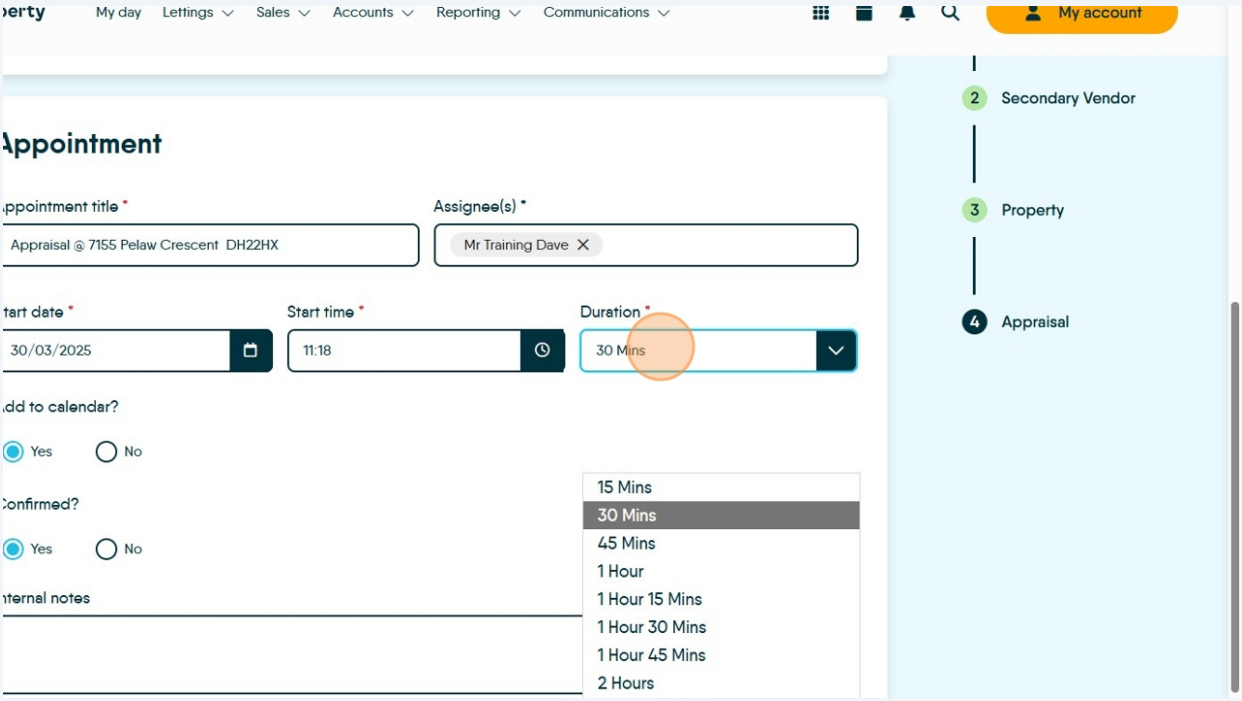
24 Click the "Start date *" field and set the appointment date.



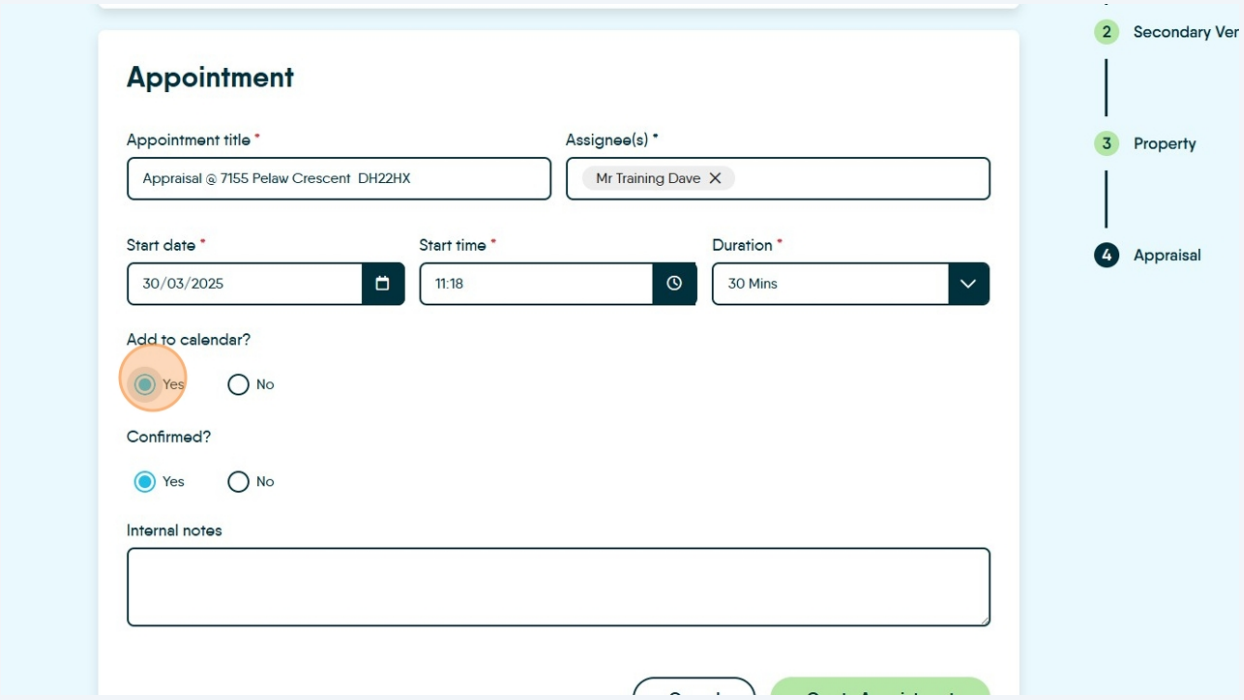
25 Click the "Start time *" field to set the appointment start time.



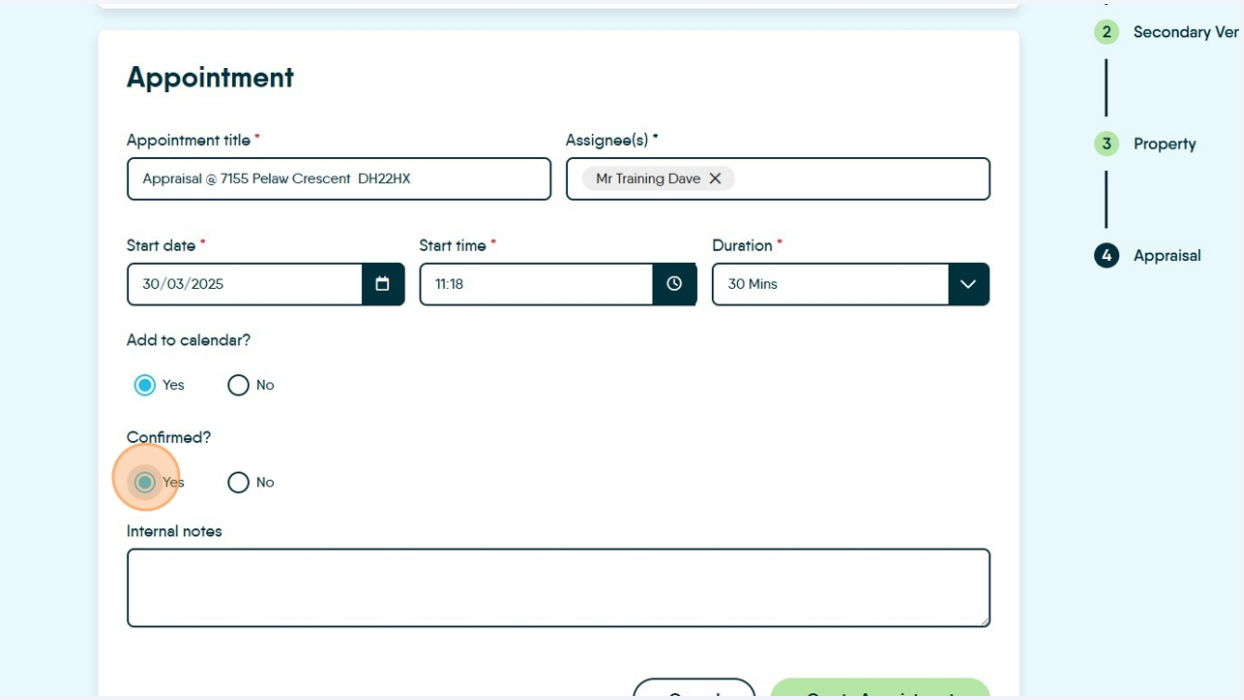
26 Click "Duration" to set the length of the appointment.



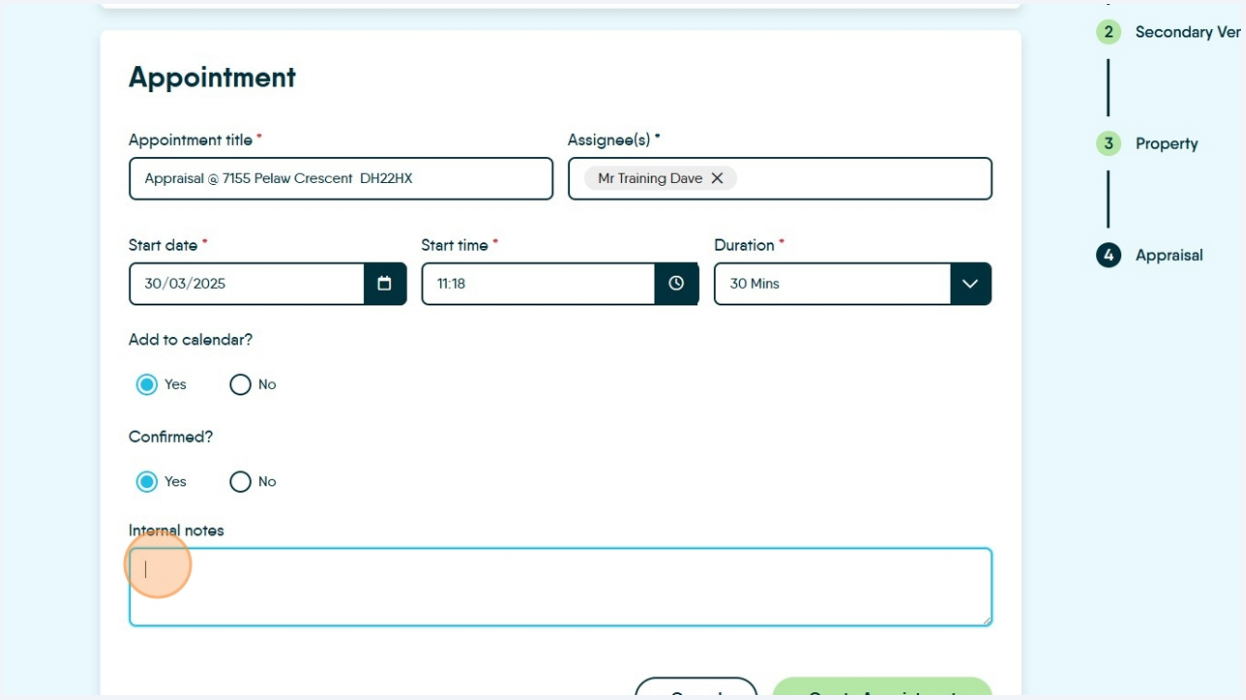
27 Click "Yes" or "No" to add to the calendar.



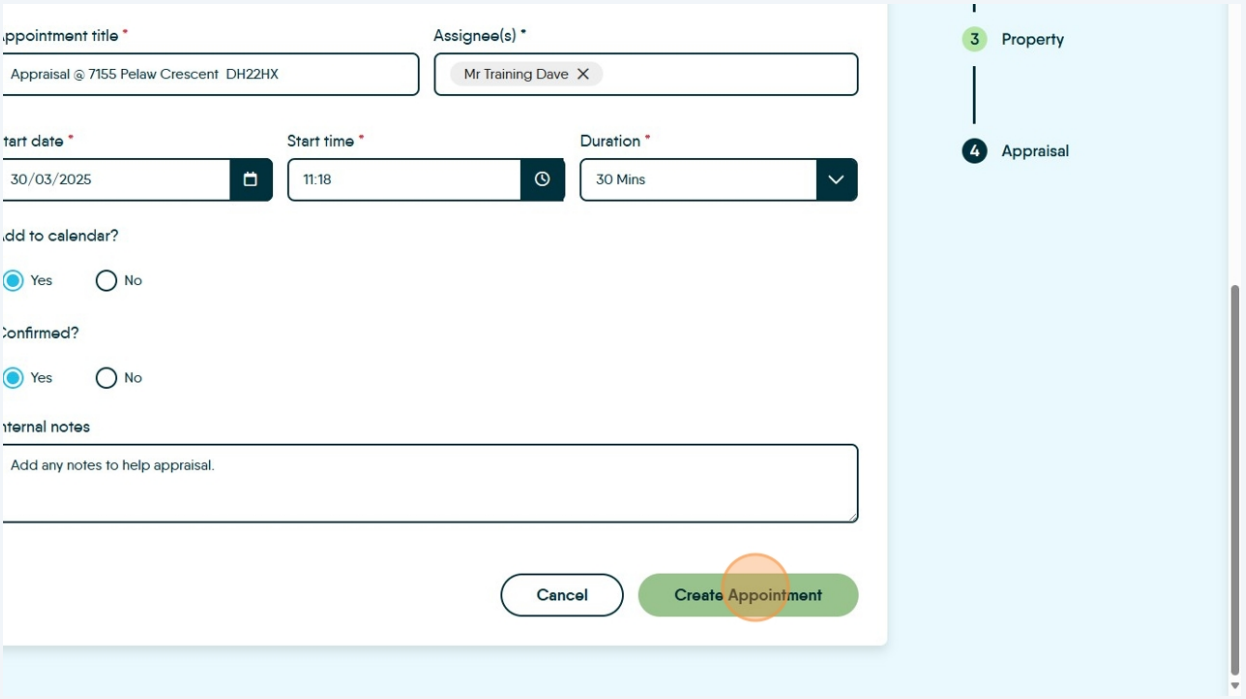
28 Click "Yes" or "No" to confirm the appointment in the calendar.

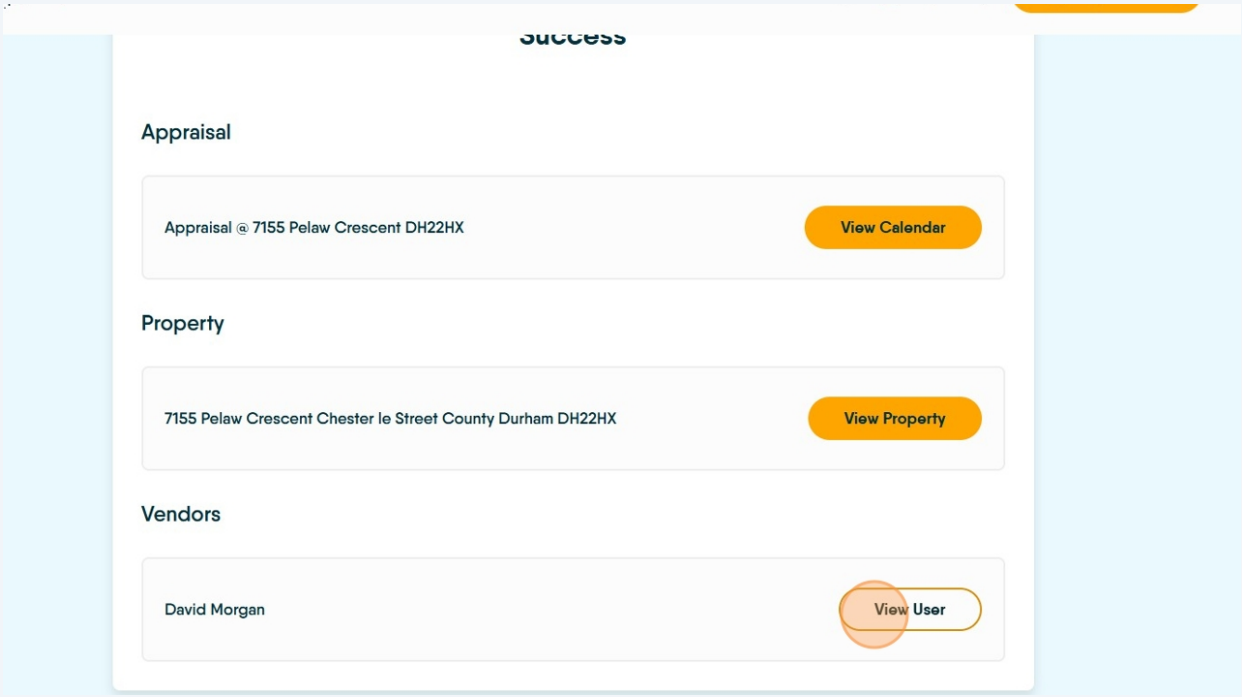


29 Click this field and add any notes you want to show in the Appraisal appointment.



30 Click "Create appointment"



Success

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