

# Viewing Appraisals Requiring Conclusion and Managing Appraisals

This guide provides a step-by-step process for accessing and managing appraisals that require conclusions within the CRM system.

By following these instructions, users can efficiently navigate the platform to view and assess property appraisals, ensuring timely decision-making and effective management of sales data. It's an essential resource for anyone involved in property sales or appraisal management.

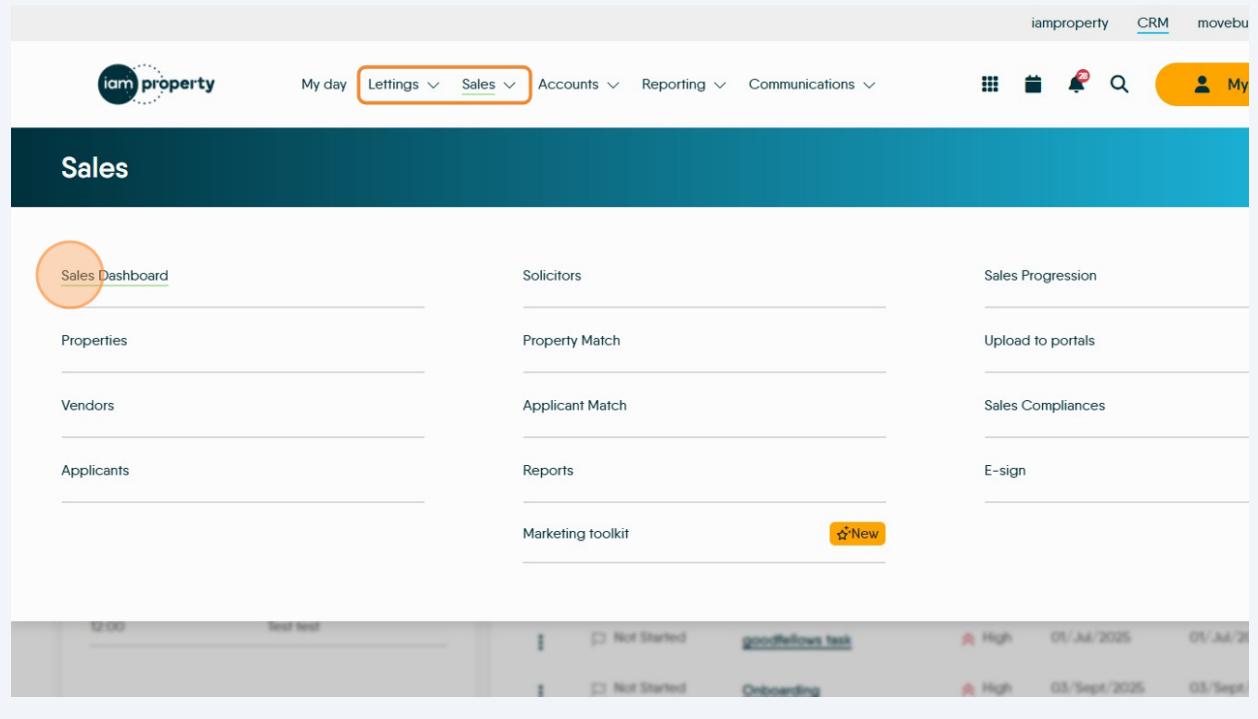


This guide covers both Sales and Letting Appraisals Requiring Conclusion.

1

From anywhere in the CRM Click Sales or Lettings at the top of the screen, then select the appropriate dashboard. In the following example we are looking at the Sales Dashboard.

**Click "Sales Dashboard"**

A screenshot of the iam property Sales Dashboard. The top navigation bar includes 'My day', 'Lettings', 'Sales' (which is highlighted with an orange border), 'Accounts', 'Reporting', and 'Communications'. To the right are icons for a grid, calendar, notifications, search, and user profile. The main header is 'Sales'. On the left, a sidebar shows 'Sales Dashboard' (highlighted with an orange circle), 'Properties', 'Vendors', and 'Applicants'. The main content area is divided into three columns: 'Solicitors' (with 'Property Match' and 'Applicant Match' links), 'Sales Progression' (with 'Upload to portals' and 'Sales Compliances' links), and 'Reports' (with 'Marketing toolkit' and a 'New' button). At the bottom, there are two task cards: 'goodFellow's task' (Not Started, Due 01/Jul/2025) and 'Onboarding' (Not Started, Due 03/Sept/2025).

## 2 Navigate to Sales or Lettings Dashboards

Properties + 16

Vendors + 71

Applicants + 44

Sales Progression 34

Pending Offers 6

Portals

Key Control

Activity List

- Sales Applicant Checklist 4
- Applicants Not Contacted 19
- Appraisal Checklist 3
- Appraisals Requiring Conclusion 41
- Calls Upcoming/Outstanding 38
- EPC Due 1

Please select an activity list item to begin

## 3 Click "Appraisals Requiring Conclusion"

Properties + 76

Vendors + 71

Applicants + 44

Sales Progression 34

Pending Offers 6

Portals

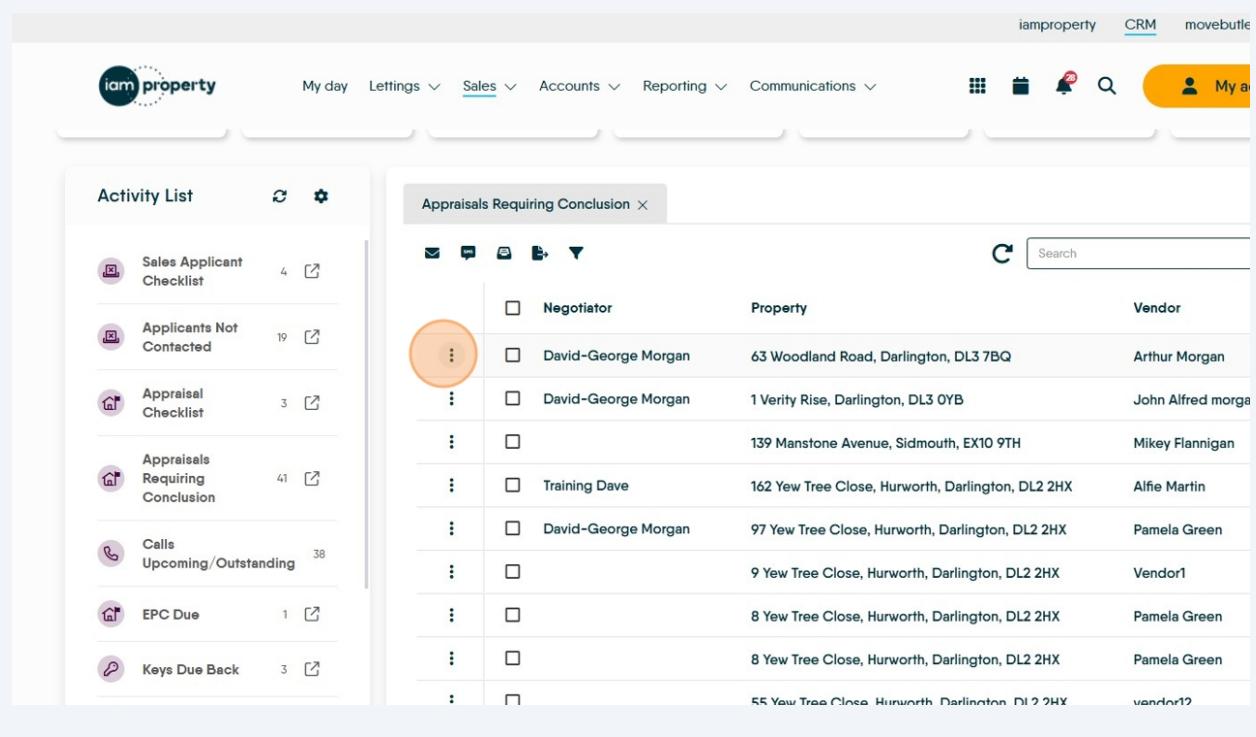
Key Control

Activity List

- Sales Applicant Checklist 4
- Applicants Not Contacted 19
- Appraisal Checklist 3
- Appraisals Requiring Conclusion 41
- Calls Upcoming/Outstanding 38
- EPC Due 1
- Keys Due Back 3

Please select an activity list item to begin

4 Click the 3-dot menu here.

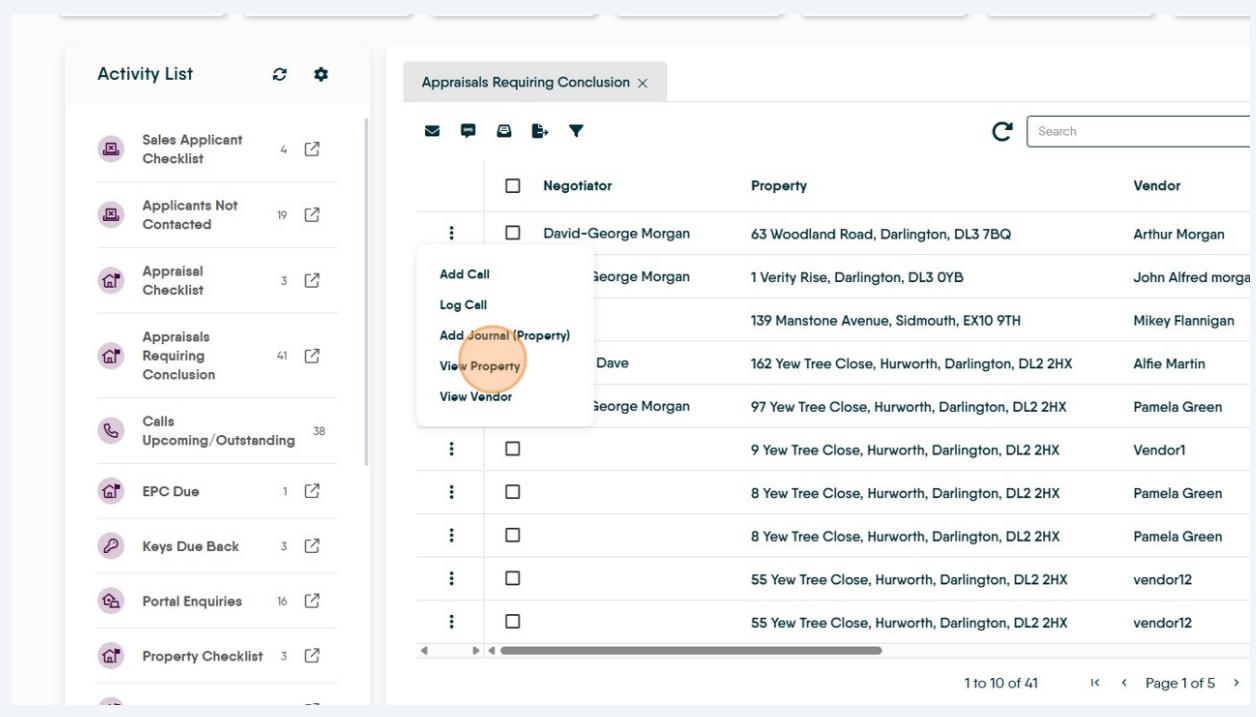


Activity List

Appraisals Requiring Conclusion

	Negotiator	Property	Vendor
...	David-George Morgan	63 Woodland Road, Darlington, DL3 7BQ	Arthur Morgan
...	David-George Morgan	1 Verity Rise, Darlington, DL3 0YB	John Alfred morga
...		139 Manstone Avenue, Sidmouth, EX10 9TH	Mikey Flannigan
...	Training Dave	162 Yew Tree Close, Hurworth, Darlington, DL2 2HX	Alfie Martin
...	David-George Morgan	97 Yew Tree Close, Hurworth, Darlington, DL2 2HX	Pamela Green
...		9 Yew Tree Close, Hurworth, Darlington, DL2 2HX	Vendor1
...		8 Yew Tree Close, Hurworth, Darlington, DL2 2HX	Pamela Green
...		8 Yew Tree Close, Hurworth, Darlington, DL2 2HX	Pamela Green
...		55 Yew Tree Close, Hurworth, Darlington, DL2 2HX	Vendor12

5 Click "View Property"



Activity List

Appraisals Requiring Conclusion

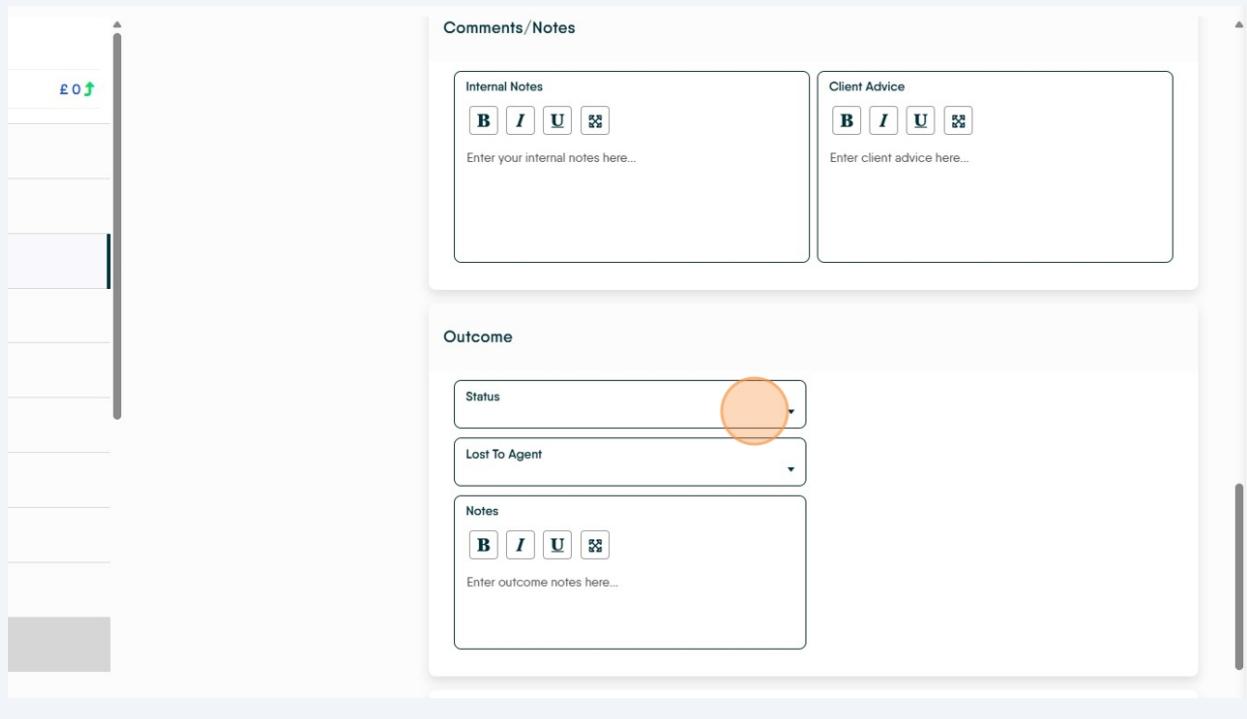
	Negotiator	Property	Vendor
...	David-George Morgan	63 Woodland Road, Darlington, DL3 7BQ	Arthur Morgan
Add Cell	George Morgan	1 Verity Rise, Darlington, DL3 0YB	John Alfred morga
Log Cell		139 Manstone Avenue, Sidmouth, EX10 9TH	Mikey Flannigan
Add Journal (Property)	Dave	162 Yew Tree Close, Hurworth, Darlington, DL2 2HX	Alfie Martin
View Property	George Morgan	97 Yew Tree Close, Hurworth, Darlington, DL2 2HX	Pamela Green
View Vendor		9 Yew Tree Close, Hurworth, Darlington, DL2 2HX	Vendor1
		8 Yew Tree Close, Hurworth, Darlington, DL2 2HX	Pamela Green
		8 Yew Tree Close, Hurworth, Darlington, DL2 2HX	Pamela Green
		55 Yew Tree Close, Hurworth, Darlington, DL2 2HX	Vendor12
		55 Yew Tree Close, Hurworth, Darlington, DL2 2HX	Vendor12

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6 Once in the Property Record. Click "**Appraisals**"

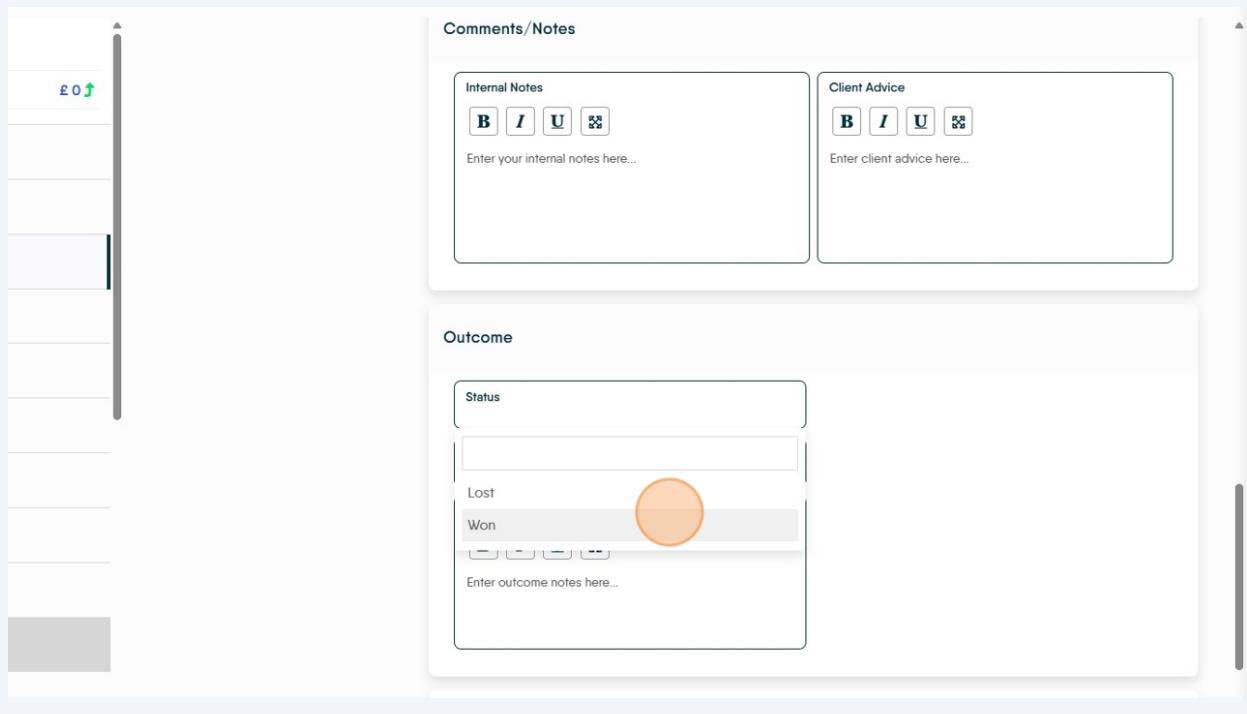
7 View and Update the Appraisal. To move the appraisal from the "...awaiting conclusion" menu scroll to the bottom of the screen and select 'Won'

8 To resolve the Appraisal scroll to the bottom of the page.



The screenshot shows the appraisal software's interface. At the top, there is a 'Comments/Notes' section with 'Internal Notes' and 'Client Advice' fields, each with a set of icons (B, I, U, S) and a placeholder text area. Below this is the 'Outcome' section, which includes a 'Status' dropdown menu. The 'Status' dropdown is open, showing options like 'Lost To Agent' and 'Won'. The 'Won' option is highlighted with an orange circle. Below the status dropdown is a 'Notes' field with the same set of icons and a placeholder text area.

9 Click "Won" or "Lost" and enter any comments, who the business was lost to etc.



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