

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.

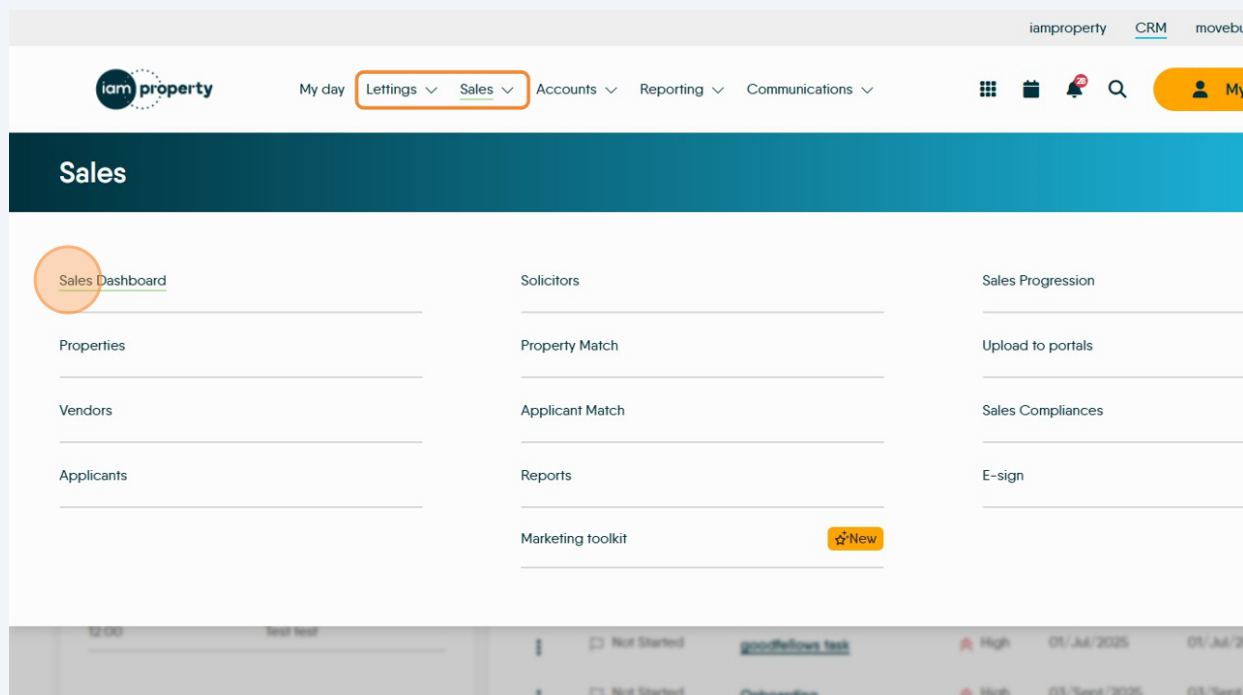


This guide covers both Sales and Lettings Appraisals Requiring Conclusion.

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"**



2 Navigate to **Sales or Lettings Dashboards**

The screenshot shows the 'iam property' dashboard with the 'Sales' tab selected. The top navigation bar includes 'My day', 'Lettings', 'Sales', 'Accounts', 'Reporting', and 'Communications'. The main dashboard features several summary cards: Properties (16), Vendors (71), Applicants (44), Sales Progression (34), Pending Offers (6), Portals, and Key Control. On the left, an 'Activity List' sidebar contains items like 'Sales Applicant Checklist', 'Applicants Not Contacted', 'Appraisal Checklist', 'Appraisals Requiring Conclusion', 'Calls Upcoming/Outstanding', and 'EPC Due'. The main content area displays a message: 'Please select an activity list item to begin'.

3 Click "**Appraisals Requiring Conclusion**"

This screenshot is identical to the previous one, but with an orange circle highlighting the 'Appraisals Requiring Conclusion' item in the 'Activity List' sidebar. The item shows a house icon, the text 'Appraisals Requiring Conclusion', and the number '41'.

4 Click the **3-dot menu** here.

iamproperty CRM movebutle

My day Lettings Sales Accounts Reporting Communications

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

Appraisals Requiring Conclusion

Search

	Negotiator	Property	Vendor
⋮	<input type="checkbox"/> David-George Morgan	63 Woodland Road, Darlington, DL3 7BQ	Arthur Morgan
⋮	<input type="checkbox"/> David-George Morgan	1 Verity Rise, Darlington, DL3 0YB	John Alfred morgan
⋮	<input type="checkbox"/>	139 Manstone Avenue, Sidmouth, EX10 9TH	Mikey Flannigan
⋮	<input type="checkbox"/> Training Dave	162 Yew Tree Close, Hurworth, Darlington, DL2 2HX	Alfie Martin
⋮	<input type="checkbox"/> David-George Morgan	97 Yew Tree Close, Hurworth, Darlington, DL2 2HX	Pamela Green
⋮	<input type="checkbox"/>	9 Yew Tree Close, Hurworth, Darlington, DL2 2HX	Vendor1
⋮	<input type="checkbox"/>	8 Yew Tree Close, Hurworth, Darlington, DL2 2HX	Pamela Green
⋮	<input type="checkbox"/>	8 Yew Tree Close, Hurworth, Darlington, DL2 2HX	Pamela Green
⋮	<input type="checkbox"/>	55 Yew Tree Close, Hurworth, Darlington, DL2 2HX	vendor12

5 Click **"View Property"**

iamproperty CRM movebutle

My day Lettings Sales Accounts Reporting Communications

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
- Portal Enquiries 16
- Property Checklist 3

Appraisals Requiring Conclusion

Search

	Negotiator	Property	Vendor
⋮	<input type="checkbox"/> David-George Morgan	63 Woodland Road, Darlington, DL3 7BQ	Arthur Morgan
⋮	<input type="checkbox"/> David-George Morgan	1 Verity Rise, Darlington, DL3 0YB	John Alfred morgan
⋮	<input type="checkbox"/>	139 Manstone Avenue, Sidmouth, EX10 9TH	Mikey Flannigan
⋮	<input type="checkbox"/> Dave	162 Yew Tree Close, Hurworth, Darlington, DL2 2HX	Alfie Martin
⋮	<input type="checkbox"/> David-George Morgan	97 Yew Tree Close, Hurworth, Darlington, DL2 2HX	Pamela Green
⋮	<input type="checkbox"/>	9 Yew Tree Close, Hurworth, Darlington, DL2 2HX	Vendor1
⋮	<input type="checkbox"/>	8 Yew Tree Close, Hurworth, Darlington, DL2 2HX	Pamela Green
⋮	<input type="checkbox"/>	8 Yew Tree Close, Hurworth, Darlington, DL2 2HX	Pamela Green
⋮	<input type="checkbox"/>	55 Yew Tree Close, Hurworth, Darlington, DL2 2HX	vendor12
⋮	<input type="checkbox"/>	55 Yew Tree Close, Hurworth, Darlington, DL2 2HX	vendor12

1 to 10 of 41 Page 1 of 5

6 Once in the Property Record. Click "Appraisals"

iam property

My day Lettings Sales Accounts Reporting Communications

3 Viewings

0 Offers

Details

Checklist

Appraisals

Compliance

Information

Stats

Marketing

Media

Rooms

63 Woodland Road, Darlington, DL3 7BQ |

Offers In Excess Of £ 500,000 | 13 | 14 Available

Lead vendor: Mr. Arthur Morgan View Vendors

Reference Negotiator David-George Morgan Branch Morgan & Co Status

PROPERTY PICTURES Upload

Content Approval

✓ Vendor has approved this content

Property Address Edit

Postcode DL3 7BQ

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'

iam property

My day Lettings Sales Accounts Reporting Communications

3 Viewings

0 Offers

Details

Checklist

Appraisals

Compliance

Information

Stats

Marketing

Media

Rooms

63 Woodland Road, Darlington, DL3 7BQ |

Offers In Excess Of £ 500,000 | 13 | 14 Available

Lead vendor: Mr. Arthur Morgan View Vendors

Reference Negotiator David-George Morgan Branch Morgan & Co Status

+ Add Appraisal

26 Apr 2023 16:00 - 17:00 Delete Save

Valuation Appointment

Valuers Training Dave X

Appointment Booked

Appointment Date 26/04/2023 16:00 Duration 1 Hour

Valuation

Price From £ 0 Price To £ 0

Vendor £ 0 Suggested £ 0

Fee Amount 0% % £

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

The screenshot shows a mobile app interface for an appraisal. On the left is a vertical list of items, with the top one labeled '£ 0 ↑'. The main content area is divided into two sections: 'Comments/Notes' and 'Outcome'. The 'Comments/Notes' section contains two text input fields: 'Internal Notes' and 'Client Advice', each with bold (B), italic (I), underline (U), and link icons above them. The 'Outcome' section contains a 'Status' dropdown menu, a 'Lost To Agent' dropdown menu, and a 'Notes' text input field with bold, italic, underline, and link icons. An orange circle highlights the 'Status' dropdown menu.

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

This screenshot shows the same app interface as the previous one, but with the 'Status' dropdown menu open. The menu shows two options: 'Lost' and 'Won'. The 'Won' option is highlighted with a grey background and an orange circle. Below the dropdown menu is a 'Notes' text input field with bold, italic, underline, and link icons.