

LATEST RELEASES

16 December 2025 - VERSION 2.42.0



CRM RELEASE

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New features

Financial Services appointment type

We've introduced a new **Financial Services** appointment type in the calendar for both sales & lettings, designed to help you track conversations with clients about the financial services you offer. When creating an appointment, you can now link it directly to a specific applicant and property, keeping all related information in one place without the need for separate notes.

Each appointment also automatically creates a journal entry on the relevant record, removing the need to copy and paste details and making it easier to maintain a complete activity history.

Activity Lists UI Refinements

We've made a series of refinements to some of our activity lists to improve clarity, consistency, and ease of use. These updates enhance visual cues and interaction behaviour, making it quicker and more intuitive to navigate and work with activities across the system.

Additional updates & General Improvements

We've continued to make enhancements to CRM to improve the overall experience.

For more information or support call: 01865 860 871

Coming Soon – New Calendar

Your brand-new calendar experience in CRM is almost here.

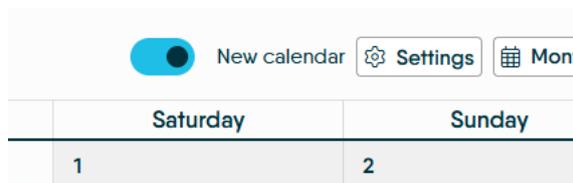
We know how important it is to keep track of your diary and appointments — whether for viewings, appraisals, or property management — it’s a key part of your day-to-day. To make this easier, we’ve been working hard on a brand-new calendar experience in CRM.

The new calendar features an updated layout and design for a clearer view of your schedule, along with a much-improved mobile experience and enhanced performance.

You’ll see the option to use the new calendar over the next few days & you can read about the changes below.

Toggle calendar on/off

Once we’ve turned the new calendar on, you’ll see a new toggle at the top of the calendar screen showing ‘New Calendar’

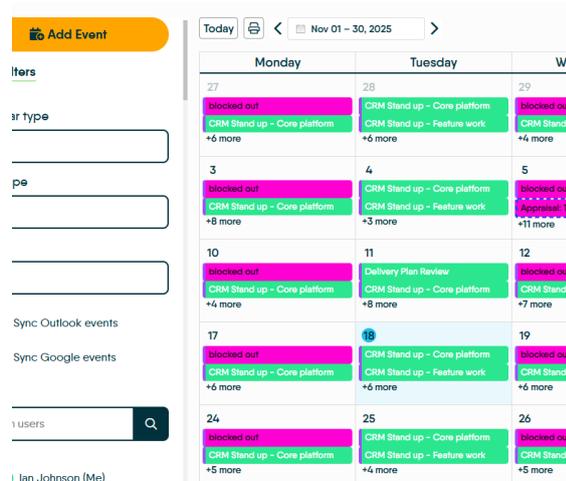


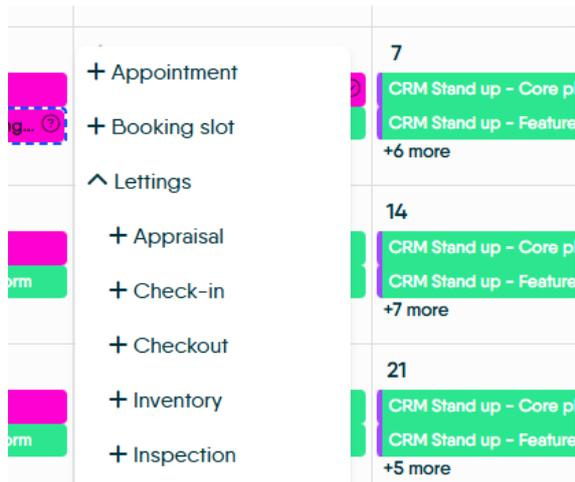
By toggling this on or off you can switch between the new calendar and the existing as you become familiar with the new version.

NOTE: The on/off toggle is persistent across sessions

Calendar UI

The change to UI within calendar means it now aligns with the rest of iamproperty CRM. All of your existing functionality remains, just with a fresh new look.





Adding viewings/appraisals

Adding an appraisal works in the same way as existing functionality (right click and add or using the menu on the left)

Appointment layout

Changes have been made to the appointment layout so it easy to see the Event, details, appointment specific information (viewing/appraisal etc.) and any reminders.

When using the Add new records functionality this will open using the Core Process Simplification journey.

Add Event - Appraisal

Event Details Appraisal Reminder

Select Property *

[Add New Property Record](#)

Select Landlord

Internal Notes