

LATEST RELEASES

08 April 2026 - VERSION 2.46.0



CRM RELEASE

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New features

Sales & Lettings

Enhanced Security with Account Lockout Protection

We all know how important data security is, so we've added additional security measures to protect your data and user accounts.

By introducing a new account lockout process which means after three unsuccessful login attempts, the account will be temporarily locked for 15 minutes we help safeguard against unauthorised access while ensuring normal access can resume automatically after the lockout period ends.

Confirm Appraisals Directly from Property Records

A new **Appointment Confirmed** option has been introduced when managing appraisals from the property record.

After booking an appraisal using the existing **Appointment Booked** option (which adds the appointment to the calendar), you can now mark it as confirmed using the new toggle. This provides a clear way to track which appraisal appointments have been formally confirmed within the calendar.

Smarter Appraisal Flag Management

Appraisal flags on property records will now update automatically based on appraisal outcomes. When an appraisal status is set to Won or Lost (within Property Record > Appraisal), any active appraisal flag in the property header will be cleared.

This ensures property records and search results remain accurate, reducing the need for manual updates and helping avoid confusion around appraisal status.

Sales

Applicant & Property Match History

Take greater control of your pipeline with enhanced visibility of property matching activity within **Sales**. You can now clearly see how applicants and properties are being matched, helping you identify engagement and conversion opportunities faster.

Detailed match information is now available directly within your records—under **Applicant Record > Matched Properties** and **Property Record > Matched Applicants**. Here, you can view key details such as the **property address, when the match was made**, and any **linked applicants**, giving you a complete picture of activity at a glance.

Matches are only recorded when meaningful actions are taken (such as sending emails or SMS), ensuring your pipeline reflects real engagement rather than passive matches.

Match history will begin building from this release, so initial totals may not align with existing match counters.

Lettings

Increased Character Limit for Inspection Reports

The character limit for inspection report entries has been increased from 500 to 2000 characters within **Inspection > Inventory > Checks**. The on-screen character counter has also been updated to reflect the new limit.

This provides greater flexibility when recording detailed inspection notes, while maintaining compatibility with existing report generation and sending processes.

Updates and refinements to the new Calendar v2

Following the recent launch of **Calendar v2**, several updates have been introduced based on user feedback to enhance usability and overall experience.

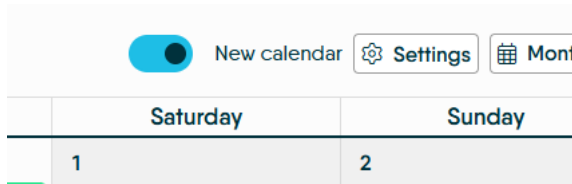
This release includes

- Improvements to the SMS modal
- Private event details only show for the event owner
- Improved mobile calendar view
- Calendar type is now a mandatory field when creating an appointment

As a reminder, you'll see the option to use the new calendar now & 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'

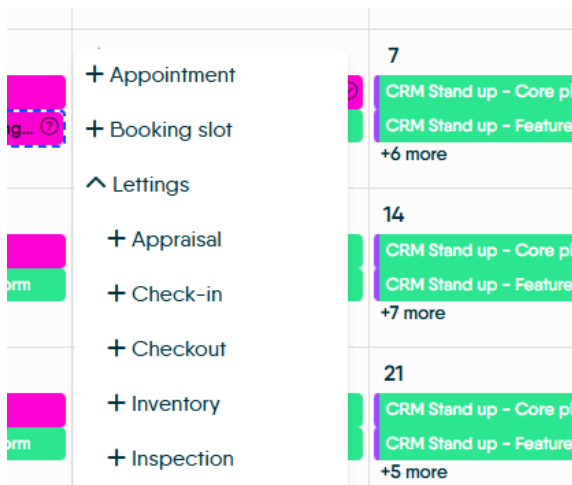
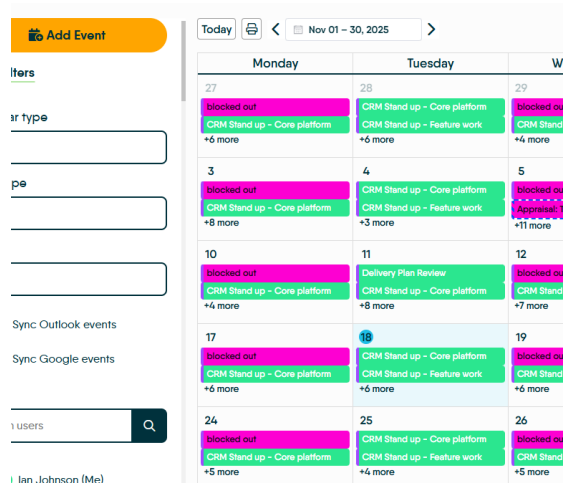


By toggling this on or off you can switch between the new calendar and the existing as you become familiar with the new version.

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.



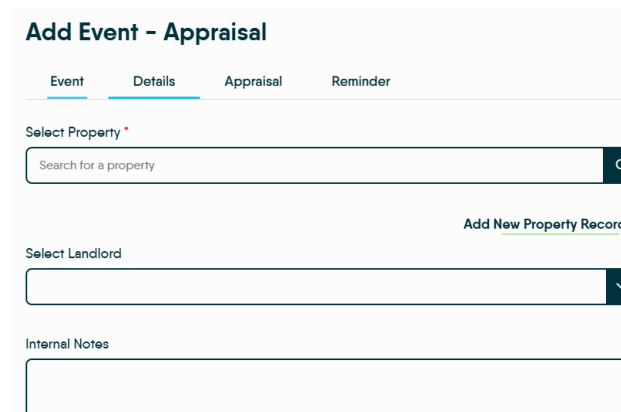
Adding viewings/appraisals

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 is 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.



Changes To Renters Rights

With the recent changes to Renters Rights, we've created a helpful article which details more about what this means to you, and how you can use iamproperty CRM to help navigate these changes. All of the information can be found [here](#).

Book a CRM Health Check

Did you know you can book a free CRM review with our team? We'll walk through how you are currently using the system and share practical tips, guidance and best practice to get the most from your CRM.

Book your health check today and make sure you are fully prepared to support your clients. Email us at crm.accountmanagement@iamproperty.com

For more information or support call: 01865 860 871