

How to Create a New Lettings Appraisal Record in iamproperty CRM



Learn how to efficiently add a new property appraisal to your CRM system. This guide provides a clear walkthrough to help you input property details, assign team members, and schedule appointments seamlessly.

New Appraisal Setup

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

The screenshot shows the 'MyDay' dashboard in the iamproperty CRM. At the top, there is a navigation bar with the iamproperty logo, menu items for 'My day', 'Lettings', 'Sales', 'Accounts', 'Reporting', and 'Communications', and a 'My account' button. Below the navigation bar, a large heading reads 'Welcome back, Training'. Underneath, there are three buttons: '+ Add New Record', 'View property management', and 'Visit help centre'. A search bar labeled 'Search all records' is positioned below these buttons. The main content area is divided into two panels: 'Today's events' and 'My tasks'. The 'Today's events' panel shows a table with two entries: '08:00 Jemmas 8-4.30' and '12:00 Test test'. The 'My tasks' panel shows a table with four tasks, all with a status of 'Not Started' and a priority of 'High'. The tasks are: 'Call Audrey' (due 08/Oct/2025), 'test' (due 24/Oct/2025), 'Visit' (due 28/Oct/2025), and 'title' (due 29/Oct/2025).

Time	Name
08:00	Jemmas 8-4.30
12:00	Test test

Status	Name	Priority	Start date	Due date
Not Started	<u>Call Audrey</u>	High	08/Oct/2025	08/Oct/2025
Not Started	<u>test</u>	High	24/Oct/2025	24/Oct/2025
Not Started	<u>Visit</u>	High	28/Oct/2025	28/Oct/2025
Not Started	<u>title</u>	High	29/Oct/2025	29/Oct/2025

2 Click "Add New Record"

The screenshot shows the iamproperty CRM dashboard. The top navigation bar includes 'iamproperty', 'CRM', and 'movebutler'. Below the navigation bar, there are menu items: 'My day', 'Lettings', 'Sales', 'Accounts', 'Reporting', and 'Communications'. A search bar and a user profile icon labeled 'My acc' are also present. The main heading reads 'Welcome back, Training'. Below this, there are three buttons: '+ Add New Record' (highlighted with an orange circle), 'View property management', and 'Visit help centre'. A search bar labeled 'Search all records' is positioned below the buttons. The dashboard is divided into two main sections: 'Today's events' and 'My tasks'. 'Today's events' shows a table with columns 'Time' and 'Name', listing 'Jemmas 8-4.30' at 08:00 and 'Test test' at 12:00. 'My tasks' shows a table with columns 'Status', 'Name', 'Priority', 'Start date', and 'Due date', listing three tasks: 'Call Audrey', 'test', and 'Visit', all with a status of 'Not Started' and a priority of 'High'.

3 Select "Lettings Appraisal" from the appointment type options.

The screenshot shows the 'Add New Record' modal form. The modal has a title 'Add New Record' and a close button. It is divided into two sections: 'Select appointment type' and 'Select record type'. In the 'Select appointment type' section, there are five options: 'Sales Appraisal', 'Lettings Appraisal' (highlighted with an orange circle), 'Sales Viewing', 'Lettings Viewing', and 'Sales Viewing'. In the 'Select record type' section, there are six options: 'Sales Applicant', 'Lettings Applicant', 'Sales Property', 'Lettings', 'Landlord', and 'Portfolio'. The background shows the same dashboard as in the previous screenshot, but it is dimmed.

4

If you are not in the My Day screen you can add a new Appraisal from the 'quick access' menu

5

Click "More actions"

iamproperty CRM movebutler iamsold

property My day Lettings Sales Accounts Reporting Communications

More actions (circled in orange)

Welcome back, Training

Add New Record View property management Visit help centre

Records

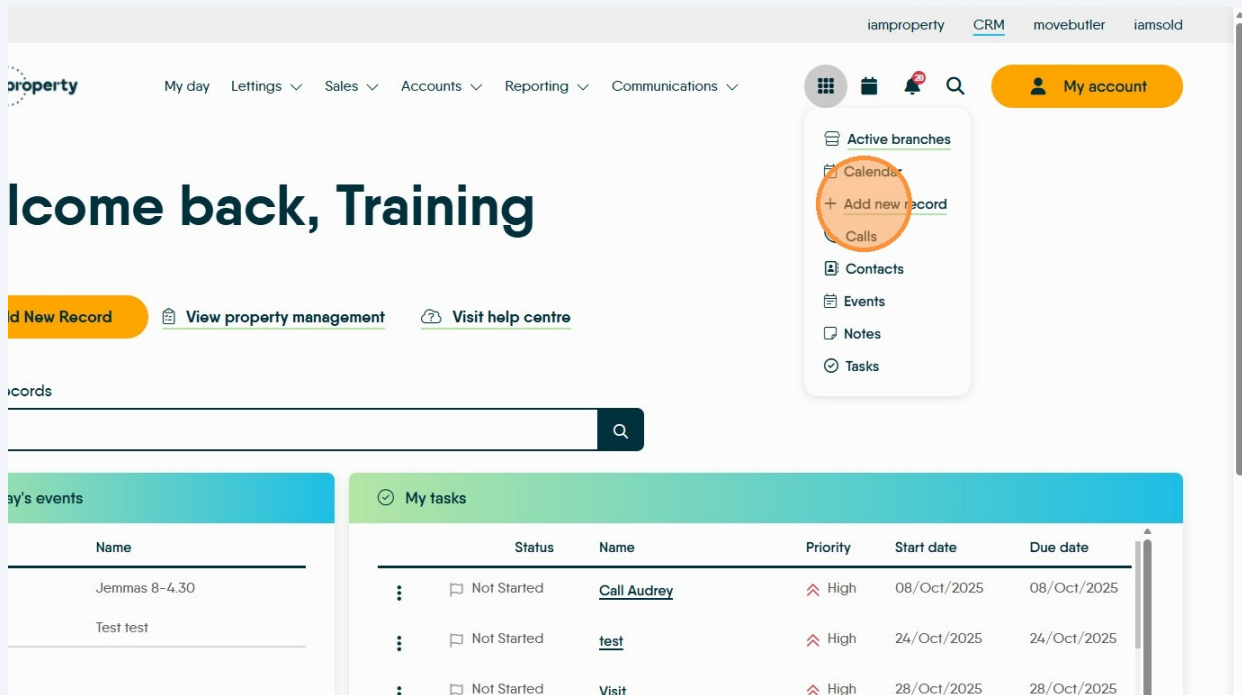
My Day's events

Name
Jemmas 8-4.30
Test test

My tasks

Status	Name	Priority	Start date	Due date
Not Started	Call Audrey	High	08/Oct/2025	08/Oct/2025
Not Started	test	High	24/Oct/2025	24/Oct/2025
Not Started	Visit	High	28/Oct/2025	28/Oct/2025

6 Click "Add new record"

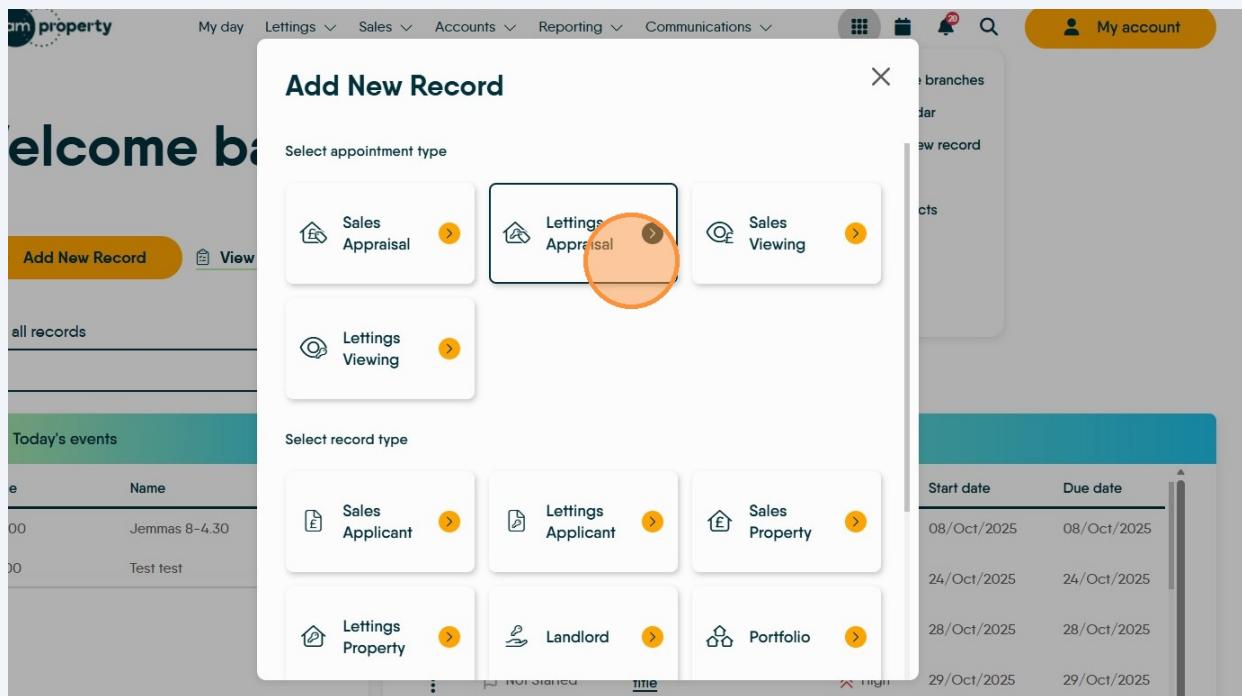


The screenshot shows the CRM dashboard with the following elements:

- Top navigation: iamproperty CRM movebutler iamsold
- Secondary navigation: My day Lettings Sales Accounts Reporting Communications
- Header: My account
- Main heading: I come back, Training
- Buttons: Add New Record, View property management, Visit help centre
- Search bar: records
- Left sidebar: Today's events (Jemmas 8-4.30, Test test)
- Right sidebar: My tasks table

Status	Name	Priority	Start date	Due date
Not Started	Call Audrey	High	08/Oct/2025	08/Oct/2025
Not Started	test	High	24/Oct/2025	24/Oct/2025
Not Started	Visit	High	28/Oct/2025	28/Oct/2025

7 Click here.



The screenshot shows the 'Add New Record' modal dialog with the following sections:

- Select appointment type:
 - Sales Appraisal
 - Lettings Appraisal** (highlighted)
 - Sales Viewing
 - Lettings Viewing
- Select record type:
 - Sales Applicant
 - Lettings Applicant
 - Sales Property
 - Lettings Property
 - Landlord
 - Portfolio

Landlord Information

8

Enter the **Landlord's Forename, Surname and Email address.**

These are mandatory records.

[Back to my day](#) >> Create Lettings Appraisal Appointment

Create Lettings Appraisal Appointment

Primary Landlord

Title	Forename *	Surname *
<input type="text"/>	<input type="text"/>	<input type="text"/>
Email *	Mobile phone	
<input type="text"/>	<input type="text"/>	
Phone number	Work phone	
<input type="text"/>	<input type="text"/>	
Branch *	Negotiator *	
<input type="text" value="Morgan & Co"/>	<input type="text" value="Training Dave"/>	

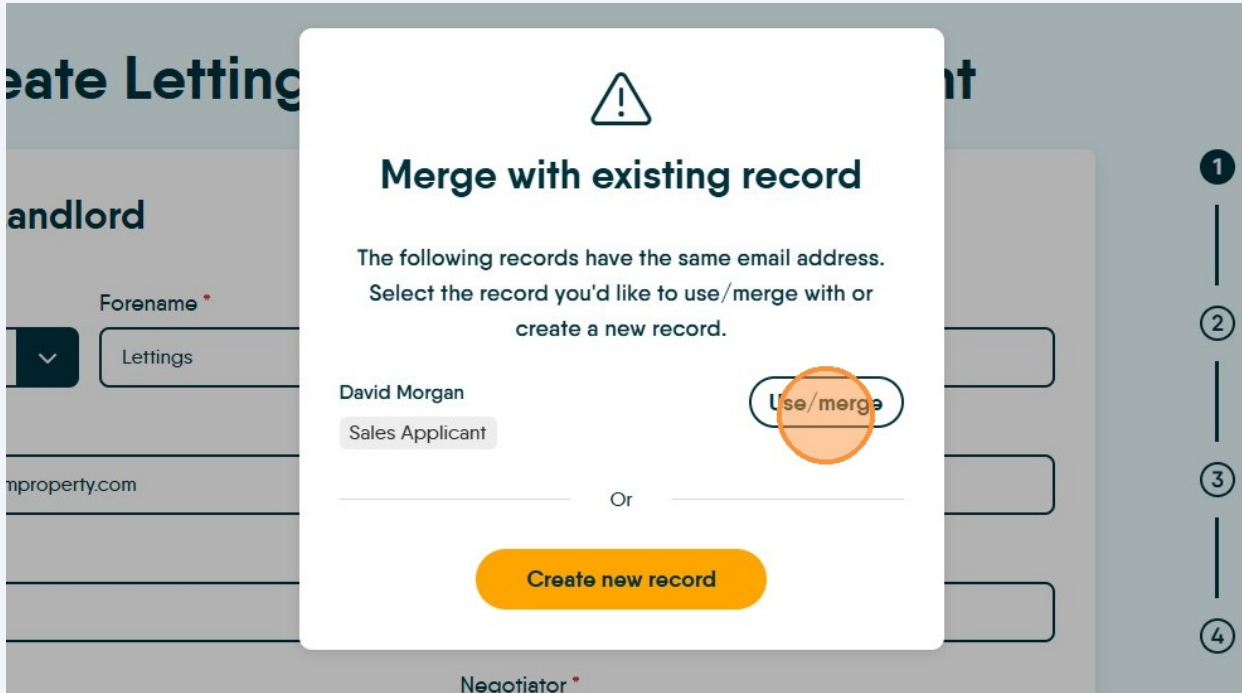
Landlord's address is different to the property

- 1 Primary Landlo
- 2 Secondary Lan
- 3 Property
- 4 Appraisal

9

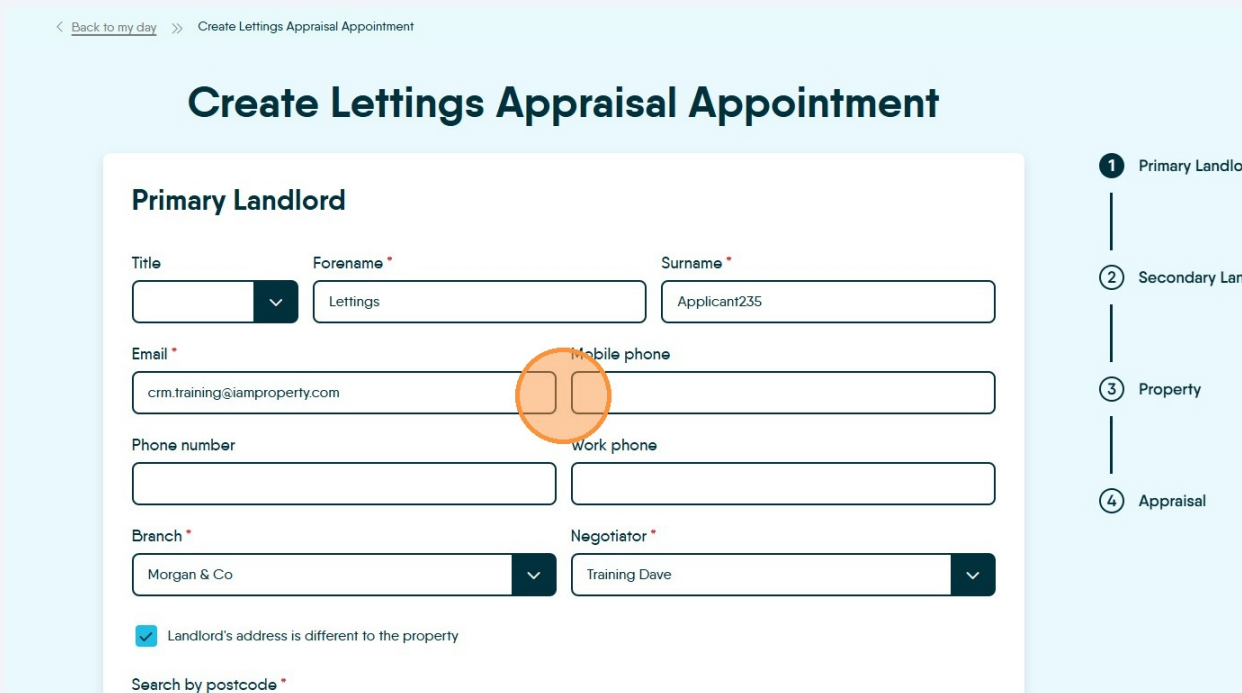
If a duplicate record warning appears this shows the email has been used before, you can use the 'Use/Merge' option to add the data from the previous record into the new one.

N.B. CRM uses a separate record for each record type, as in the example a sales applicant record has been created previously. This new record will be in addition to the sales applicant.



10

Enter the landlord's contact Email and Mobile phone number.



11

Search for and select the landlord's address by postcode. If require use the add address manually option to ad or edit the address.

Form fields: Title (dropdown), Forename (Lettings), Surname (Applicant235), Email (*: crm.training@iamproperty.com), Mobile phone, Phone number, Work phone, Branch (*: Morgan & Co), Negotiator (*: Training Dave), Landlord's address is different to the property, Search by postcode (*: Enter a full postcode), Or enter address manually, Add another landlord, Cancel, Continue.

- 1 Primary Landlo
- 2 Secondary Lan
- 3 Property
- 4 Appraisal

Form fields: Title (dropdown), Forename (Lettings), Surname (Applicant235), Email (*: crm.training@iamproperty.com), Mobile phone, Phone number, Work phone, Branch (*: Morgan & Co), Negotiator (*: Training Dave), Landlord's address is different to the property, Search by postcode (*: dh22hx), 71 Pelaw Crescent Chester le Street County Durham DH22HX, 72 Pelaw Crescent Chester le Street County Durham DH22HX, 73 Pelaw Crescent Chester le Street County Durham DH22HX, 74 Pelaw Crescent Chester le Street County Durham DH22HX, 75 Pelaw Crescent Chester le Street County Durham DH22HX, Continue.

- 1 Primary Landlor
- 2 Secondary Land
- 3 Property
- 4 Appraisal

12 Click "Continue"

Chester le Street

County *

County Durham

Select country *

UK

Postcode *

DH22HX

Latitude

54.865362

Longitude

-1.585946

[Use postcode lookup](#)

[Add another landlord](#)

Cancel Continue

- 1 Primary Landlo
- 2 Secondary Lan
- 3 Property
- 4 Appraisal

Property Details

13 Search for and select the property address by postcode.

iamproperty CRM movebutler

iamproperty My day Lettings Sales Accounts Reporting Communications My acc

Property

Search by postcode *

Enter a full postcode

Or enter address manually

Property type Property age

Please select an option Please select an option

Branch * Negotiator *

Morgan & Co Training Dave

Bedrooms Bathrooms Receptions

- 1 Primary Landlo
- 2 Secondary Lan
- 3 Property
- 4 Appraisal

iamproperty CRM movebutler

iamproperty My day Lettings Sales Accounts Reporting Communications

Property

73 Pelaw Crescent Chester le Street County Durham DH2 2HX

Property type: Please select an option

Property age: Please select an option

Branch: Morgan & Co

Negotiator: Training Dave

Bedrooms:

Bathrooms:

Receptions:

- 1 Primary Landlo
- 2 Secondary Lan
- 3 Property
- 4 Appraisal

14 Click the "Property Type" field and select from the drop down menu.

Latitude: 54.865362

Longitude: -1.585946

Use postcode lookup

Property type: Please select an option

Property age: Please select an option

Branch: Morgan & Co

Negotiator: Training Dave

Bedrooms:

Bathrooms:

Receptions:

Cancel Continue

- 1 Primary Landlo
- 2 Secondary Lan
- 3 Property
- 4 Appraisal

15 Select the Property age.

Latitude
54.865362

Longitude
-1.585946

Use postcode lookup

Property type: Detached House

Property age: Please select an option

Branch*: Morgan & Co

Negotiator*: Training Dave

Bedrooms:

Bathrooms:

Receptions:

Buttons: Cancel, Continue



Latitude
54.865362

Longitude
-1.585946

Use postcode lookup

Property type: Detached House

Property age: Please select an option

Branch*: Morgan & Co

Bedrooms:

Bathrooms:

Dropdown menu for Property age:
Period
Pre-war
Post-war
Modern
New-build

Buttons: Cancel, Continue



16 Add the number of **Bedrooms**

Latitude
54.865362

Longitude
-1.585946

Use postcode lookup

Property type
Detached House

Property age
Post-war

Branch *
Morgan & Co

Negotiator *
Training Dave

Bedrooms

Bathrooms

Receptions

Cancel Continue

- 1 Primary Landlo
- 2 Secondary Lan
- 3 Property
- 4 Appraisal

17 Enter the number of **Bathrooms**.

Latitude
54.865362

Longitude
-1.585946

Use postcode lookup

Property type
Detached House

Property age
Post-war

Branch *
Morgan & Co

Negotiator *
Training Dave

Bedrooms
3

Bathrooms

Receptions

Cancel Continue

- 1 Primary Landlo
- 2 Secondary Lan
- 3 Property
- 4 Appraisal

18 Enter the number of **Reception** rooms

Latitude
54.865362

Longitude
-1.585946

Use postcode lookup

Property type: Detached House
Property age: Post-war

Branch*: Morgan & Co
Negotiator*: Training Dave

Bedrooms: 3
Bathrooms: 2
Receptions:

Cancel Continue



19 Click "Continue"

Latitude
54.865362

Longitude
-1.585946

Use postcode lookup

Property type: Detached House
Property age: Post-war

Branch*: Morgan & Co
Negotiator*: Training Dave

Bedrooms: 3
Bathrooms: 2
Receptions: 2

Cancel Continue



Scheduling and Confirmation

20 Select the **negotiator** to assign to this appointment.

iamproperty CRM movebutler iam

iamproperty My day Lettings Sales Accounts Reporting Communications My account

Appointment

Appointment title * Appraisal @ 7333 Pelaw Crescent DH22HX Assignee(s) *

Select day April-May 2026

Start time * 10:40 Duration * 30 Mins

Add to calendar? Yes No

View Calendar

- 1 Primary Landlord
- 2 Secondary Landlord
- 3 Property
- 4 Appraisal

Appointment

Appointment title * Appraisal @ 7333 Pelaw Crescent DH22HX Assignee(s) *

Select day April-May 2026

Start time * 10:40 Duration * 30 Mins

Add to calendar? Yes No

Confirmed? Yes No

Internal notes

Brooke Morgan
David-George Morgan
Ian Johnson
James Morgan
Training Dave
VTUR USER

- 1 Primary Landlord
- 2 Secondary Landlord
- 3 Property
- 4 Appraisal

Appointment

Appointment title *
Appraisal @ 7333 Pelaw Crescent DH22HX

Assignee(s) *
Training Dave X

Select day
April-May 2026
Calendar view showing days 24 to 30. Day 24 is highlighted with an orange circle.

Start time *
10:40

Duration *
30 Mins

Training Dave has a conflicting Appointment on 2026-04-24 @ 08:00

Add to calendar?
 Yes No

Confirmed?

- 1 Primary Landlo
- 2 Secondary Lan
- 3 Property
- 4 Appraisal

21 Select the Date from the list. Set the "Start time *".

Appointment

Appointment title *
Appraisal @ 7333 Pelaw Crescent DH22HX

Assignee(s) *
Training Dave X

[View Calendar](#)

Select day
April-May 2026
Calendar view showing days 24 to 9. Day 24 is highlighted with an orange circle.

Start time *
10:40

Duration *
30 Mins

Training Dave has a conflicting Appointment on 2026-04-24 @ 08:00

Add to calendar?
 Yes No

Confirmed?

- 1 Primary Landlo
- 2 Secondary Lan
- 3 Property
- 4 Appraisal

22 Click the **"Duration"** field and set the duration of the visit.

You will see a notification if the appointment clashes with another in the assigned users calendar. Use your judgement to assess if this is a problem or not. You can view the main calendar screen by clicking on the 'View Calendar' option.

The screenshot shows the 'Appointment' form with the following details:

- Appointment title:** Appraisal @ 7333 Pelaw Crescent DH22HX
- Assignee(s):** Training Dave
- View Calendar:** [View Calendar](#)
- Select day:** April-May 2026, with the 24th of April selected.
- Start time:** 10:40
- Duration:** 30 Min (highlighted with an orange circle)
- Conflict Notification:** Training Dave has a conflicting Appointment on 2026-04-24 @ 08:00
- Add to calendar?:** Yes No
- Confirmed?:** Yes No

On the right side, a vertical navigation menu is visible with the following items:

- 1 Primary Landlord
- 2 Secondary Landlord
- 3 Property
- 4 Appraisal

23 Confirm the "Add to calendar" and "Confirmed" status settings.

N.B. If the appointment is NOT confirmed then the confirmation email will not be sent until it is. Neither will any reminder notifications.

Calendar navigation: Fri 24, Sat 25, Sun 26, Mon 27, Tue 28, Wed 29, Thu 30, Fri 1, Sat 2, Sun 3, Mon 4, Tue 5, Wed 6, Thu 7, Fri 8, Sat 9

Start time * 10:40 [Clock icon]

Duration * 30 Mins [Dropdown arrow]

i Training Dave has a conflicting Appointment on 2026-04-24 @ 08:00

Add to calendar?
 Yes No

Confirmed?
 Yes No

Internal notes

[Text area]

Cancel Create appointment

- 1 Primary Landlo
- 2 Secondary Lan
- 3 Property
- 4 Appraisal

Calendar navigation: Fri 24, Sat 25, Sun 26, Mon 27, Tue 28, Wed 29, Thu 30, Fri 1, Sat 2, Sun 3, Mon 4, Tue 5, Wed 6, Thu 7, Fri 8, Sat 9

Start time * 10:40 [Clock icon]

Duration * 30 Mins [Dropdown arrow]

i Training Dave has a conflicting Appointment on 2026-04-24 @ 08:00

Add to calendar?
 Yes No

Confirmed?
 Yes No

Internal notes

[Text area]

Cancel Create appointment

- 1 Primary Landlo
- 2 Secondary Lan
- 3 Property
- 4 Appraisal

24

Click the **"Internal notes"** field to add any additional information for the appointment.

The screenshot shows a mobile application interface for creating an appointment. At the top, there is a calendar navigation bar with days 24 through 9. Below this, the 'Start time' is set to 10:40 and the 'Duration' is set to 30 Mins. A light blue notification box states: 'Training Dave has a conflicting Appointment on 2026-04-24 @ 08:00'. There are two sections for 'Add to calendar?' and 'Confirmed?', both with 'Yes' selected. The 'Internal notes' field is a large text area, currently empty, and is highlighted with an orange circle. At the bottom, there are 'Cancel' and 'Create appointment' buttons. On the right side, a vertical list of steps is shown: 1 Primary Landlo, 2 Secondary Lan, 3 Property, and 4 Appraisal.

25

Click **"Create appointment"**

This screenshot is identical to the previous one, showing the appointment creation form. The 'Internal notes' field is still empty. In this view, the 'Create appointment' button at the bottom right is highlighted with an orange circle. The rest of the form, including the calendar, start time, duration, conflict message, and step list on the right, remains the same.

26

The details will show on the screen, as well as confirmation messages that the records have been created.

This is all the records you need to create to book an appraisal appointment and send the confirmation.

The screenshot displays a confirmation page for an appraisal. At the top, a green checkmark icon is followed by the heading "Appraisal added successfully". Below this, the page is organized into three sections: "Appointment", "Property", and "Landlords".

Appointment

Appraisal @ 7333 Pelaw Crescent DH22HX [View calendar](#)

Date: 24 April 2026 10:40 Assignees: Training Dave
Added to Calendar: Yes

Property

7333 Pelaw Crescent Chester le Street County Durham DH22HX [View property](#)

Bedrooms: 3 Bathrooms: 2
Receptions: 2

Landlords

Two green notification banners are visible in the top right corner. The top one says "Property creation succeeded" and the bottom one says "Success Appraisal creation succeeded". An orange circle highlights the "View property" button in the Property section.