

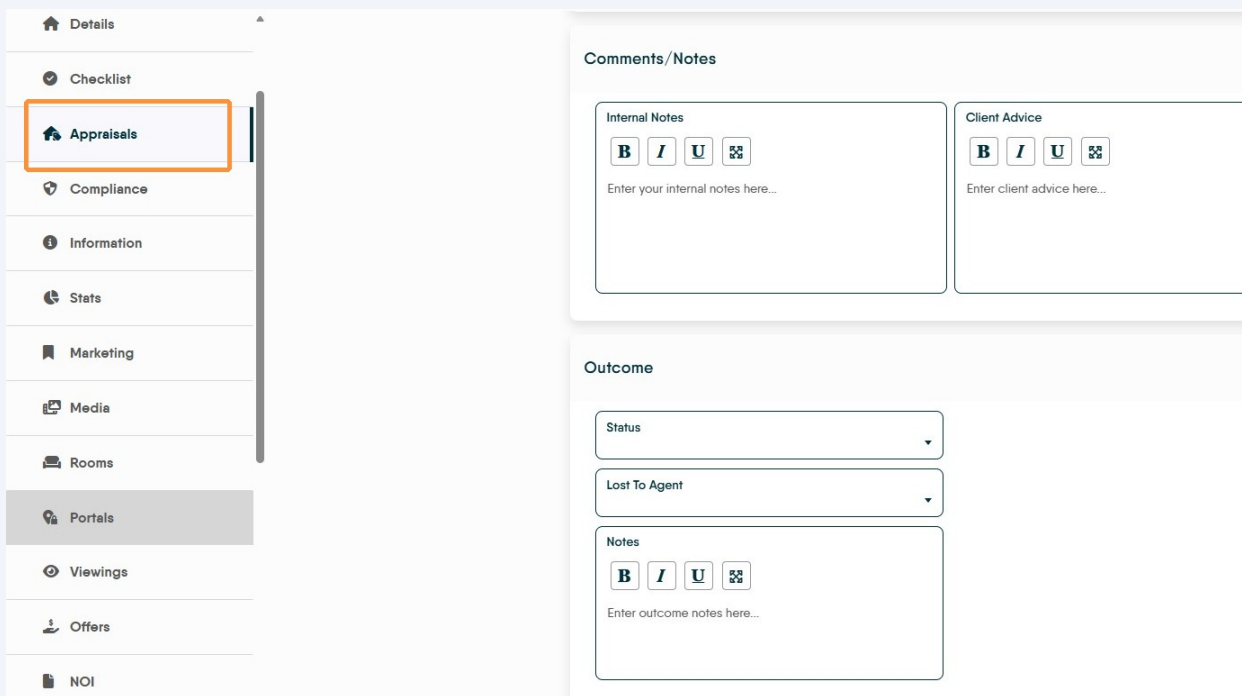
# Adding a New Estate Agent to a Property Appraisal



Learn how to efficiently associate a new Estate Agent with a property listing within your CRM. This allows you to note who you lost the business to in the Appraisal screen. This guide walks you through inputting agent details and updating appraisal statuses to keep your property records organised.

## 1 Navigate to **Appraisals** tab.

If you have lost the business of a customer and need to put in the detail of the agent you have lost the business to, you would click into the 'Outcome' section of the Appraisal and change the status to 'Lost' and select the Agency you lost the business to in the drop down menu. If the Agency isn't there, the following is the process to use to add the new agency detail.



## Sub-Agent Registration

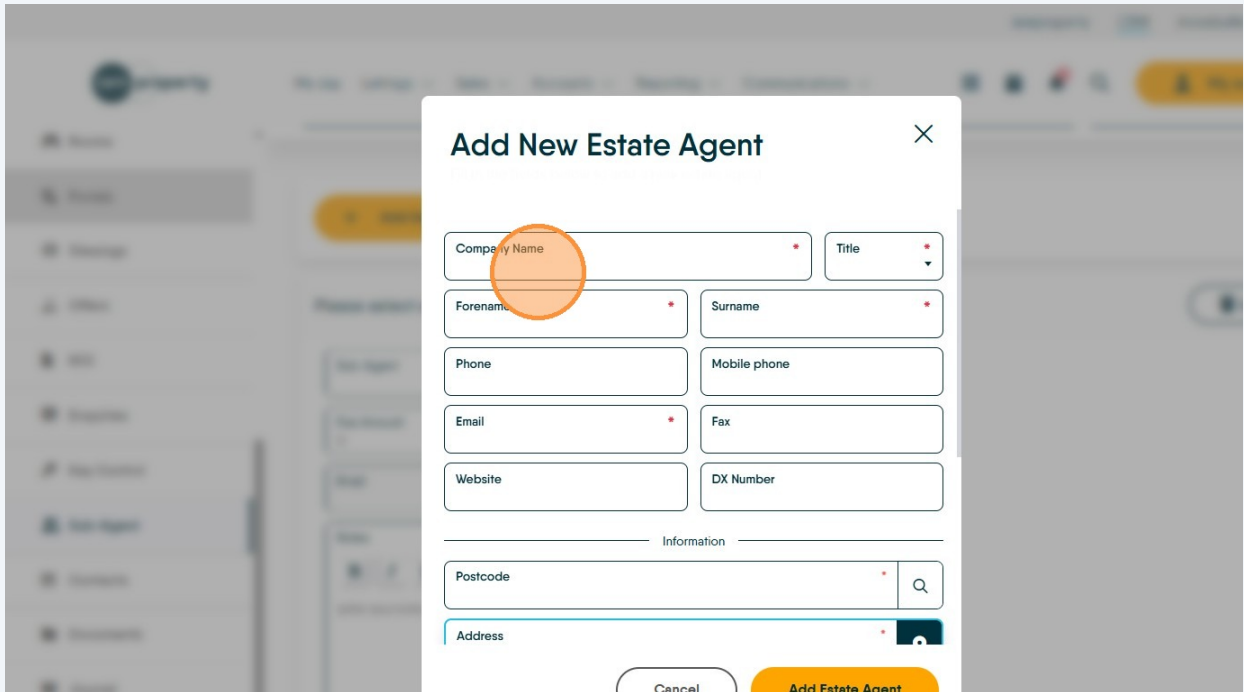
## 2 Click **Sub-Agent** in side menu

The screenshot shows a side menu on the left with the following items: Rooms, Portals, Viewings, Offers, NOI, Enquiries, Key Control, Sub-Agent (highlighted with an orange circle), Contacts, Documents, Journal, Matched applicants, and Audit. The main content area is titled 'Comments/Notes' and contains three text input fields: 'Internal Notes' with a rich text editor (B, I, U, and a list icon), 'Client Advice' with a rich text editor, and 'Outcome' which includes a 'Status' dropdown, a 'Lost To Agent' dropdown, and a 'Notes' field with a rich text editor.

## 3 Click **Add Sub Agent**

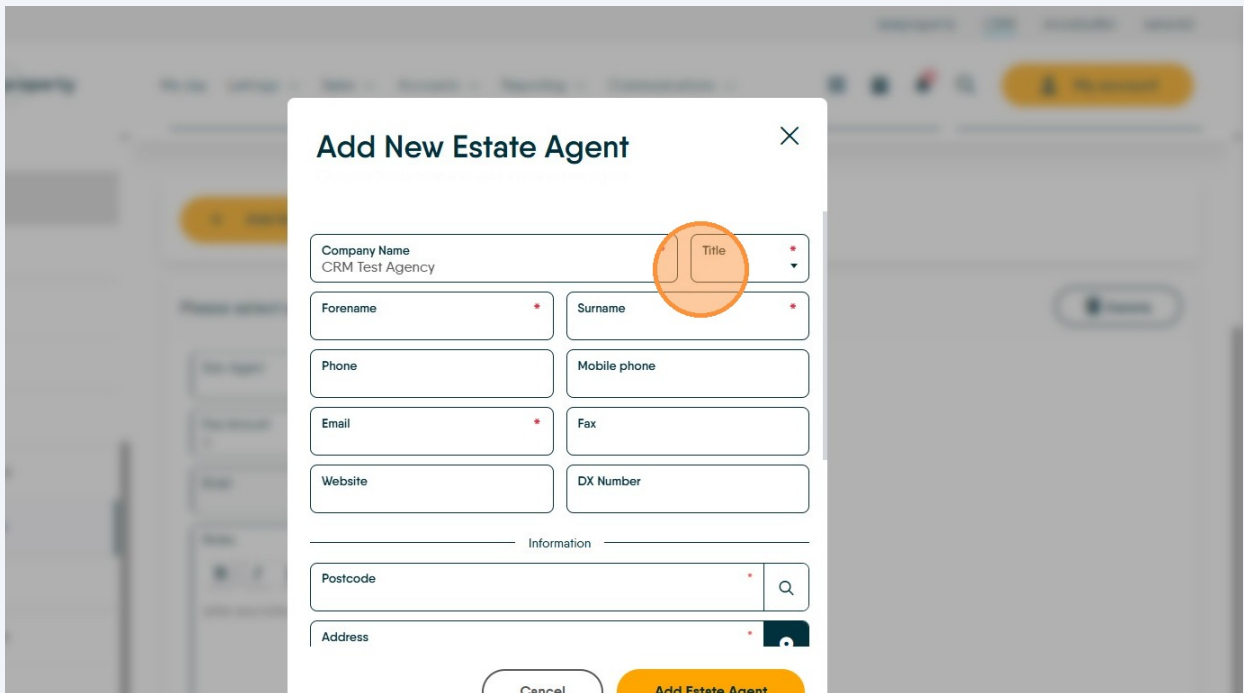
The screenshot shows the 'Add Sub Agent' form. At the top, there is a navigation bar with 'iam property' logo and menu items: My day, Lettings, Sales, Accounts, Reporting, Communications. A sidebar on the left lists various menu items, with 'Sub-Agent' highlighted. The main form area has a yellow '+ Add Sub Agent' button. Below it, the title 'Please select a Sub-Agent' is followed by a form with the following fields: 'Sub-Agent' (dropdown with a '+' icon highlighted by an orange circle), 'Contact' (dropdown with a '+' icon), 'Fee Amount' (input with a '%' symbol), 'Phone' (input), 'Email' (input), and 'Notes' (rich text editor with B, I, U, and list icons).

4 Type the Name of the Agency into Company Name field



The screenshot shows a modal form titled "Add New Estate Agent" with a close button (X) in the top right corner. The form contains several input fields: "Company Name" (with a red asterisk), "Title" (with a dropdown arrow), "Forename" (with a red asterisk), "Surname" (with a red asterisk), "Phone", "Mobile phone", "Email" (with a red asterisk), "Fax", "Website", and "DX Number". Below these fields is a section labeled "Information" containing "Postcode" (with a red asterisk and a search icon) and "Address" (with a red asterisk and a location icon). At the bottom of the form are "Cancel" and "Add Estate Agent" buttons. An orange circle highlights the "Company Name" field.

5 Add in the contact details



The screenshot shows the same "Add New Estate Agent" form. The "Company Name" field now contains the text "CRM Test Agency". The "Title" dropdown menu is open, showing a list of options, and is highlighted with an orange circle. The "Forename" and "Surname" fields are also highlighted with orange circles. The "Postcode" field contains "E1 1AA" and the "Address" field contains "123 Main Street". The "Add Estate Agent" button is now highlighted in yellow.

**Add New Estate Agent** [X]

Company Name CRM Test Agency *	Title *
Forename *	Surname
Phone	Mobile phone
Email *	Fax
Website	DX Number

Information

Postcode \*

Address \*

Cancel Add Estate Agent

The dropdown menu for the Title field is open, showing options: Mr, Miss, Mrs, Ms, and Mr & Mrs. The 'Mr' option is highlighted with an orange circle.

**6** Enter the email address into Email field

**Add New Estate Agent** [X]

Company Name CRM Test Agency *	Title Mr
Forename Estate *	Surname Agent *
Phone	Mobile phone
Email *	Fax
Website	DX Number

Information

Postcode \*

Address \*

Cancel Add Estate Agent

The Email field is highlighted with an orange circle.

**7** Enter the postcode of the agency into Postcode field and click search

### Add New Estate Agent

Company Name CRM Test Agency *	Title Mr ▼
Forename Estate *	Surname Agent *
Phone	Mobile phone
Email estateagent@agent.co *	Fax
Website	DX Number
Information	
Postcode	🔍
Address	📍

### Add New Estate Agent

Company Name CRM Test Agency *	Title Mr ▼
Forename Estate *	Surname Agent *
Phone	Mobile phone
Email estateagent@agent.co *	Fax
Website	DX Number
Information	
Postcode DL39LA	🔍
Address	📍

8 Select agent's address from dropdown

## Add New Estate Agent



**Company Name** CRM Test Agency \* **Title** Mr \*

**Forename** Estate \* **Surname** Agent \*

**Phone** **Mobile phone**

-- Select Address --

- Rutherford Projects Ltd 17 Barrett Road, Darlington, County Durham, DL38LA, UK
- 15 Barrett Road, Darlington, County Durham, DL38LA, UK
- 17 Barrett Road, Darlington, County Durham, DL38LA, UK
- 19 Barrett Road, Darlington, County Durham, DL38LA, UK

**Address** -- Select Address --

## Add New Estate Agent



**Company Name** CRM Test Agency \* **Title** Mr \*

**Forename** Estate \* **Surname** Agent \*

**Phone** **Mobile phone**

-- Select Address --

- 35 Barrett Road, Darlington, County Durham, DL38LA, UK
- 37 Barrett Road, Darlington, County Durham, DL38LA, UK
- 39 Barrett Road, Darlington, County Durham, DL38LA, UK
- 41 Barrett Road, Darlington, County Durham, DL38LA, UK
- 43 Barrett Road, Darlington, County Durham, DL38LA, UK
- 45 Barrett Road, Darlington, County Durham, DL38LA, UK

**Address** -- Select Address --

9 Click **Add Estate Agent** The Agent is now added to the CRM as a business record.

**Add New Estate Agent**

Company Name CRM Test Agency \* Title Mr \*

Forename Estate \* Surname Agent \*

Phone Mobile phone

Email estateagent@agent.co \* Fax

Website DX Number

Information

Postcode DL38LA \*

Address 45 Barrett Road, Darlington, County Durham, DL38LA, UK \*

Cancel Add Estate Agent

## Appraisal Outcome Update

10 Navigate back to Appraisals section

iamproperty CRM movebutle

iam property My day Lettings Sales Accounts Reporting Communications

+ Add Sub Agent

Please select a Sub-Agent

Sub-Agent + Contact +

Fee Amount 0 % £ Phone

Email

Notes

B I U

Enter your notes here...

## 11 Select the relevant appraisal record


The screenshot shows a software interface for managing appraisal records. On the left is a sidebar with a list of records. The main area contains a form for a record dated 30 Apr 2026. At the top left of the form is a yellow button labeled '+ Add Appraisal'. At the top right are 'Cancel' and 'Save' buttons. The form is divided into several sections: 'Valuation Appointment' with fields for 'Valuers' (containing 'Training Dave'), 'Appointment Booked', 'Appointment Confirmed', 'Appointment Date', and 'Duration'; 'Valuation' with fields for 'Price From', 'Price To', 'Vendor', 'Suggested', and 'Fee Amount' (0.00%); 'Checklist'; and 'Comments/Notes' with 'Internal Notes' and 'Client Advice' sub-sections, each containing bold, italic, and underline formatting icons.

## 12 Set appraisal Status to "Lost"

This screenshot shows the same appraisal record form, but with the 'Outcome' section expanded. The 'Status' dropdown menu is highlighted with an orange circle, indicating it should be set to 'Lost'. Below it is the 'Lost To Agent' dropdown menu. The 'Comments/Notes' section is also visible, showing the 'Internal Notes' and 'Client Advice' text areas with their respective formatting icons.


Comments/Notes

**Internal Notes**

**B** ***I*** **U** 

Enter your internal notes here...

**Client Advice**

**B** ***I*** **U** 

Enter client advice here...

Outcome

Status

Lost


Won

Enter outcome notes here...

**13** Select "CRM Test Agency" from Lost To Agent dropdown


Comments/Notes

**Internal Notes**

**B** ***I*** **U** 

Enter your internal notes here...

**Client Advice**

**B** ***I*** **U** 

Enter client advice here...


Outcome

Status

Lost

Lost To Agent

Notes


**B** ***I*** **U** 

Enter outcome notes here...

My My Settings Case Records Reporting Communications My Account

### Comments/Notes

**Internal Notes**


**B** *I* U 

Enter your internal notes here...

Brown & Co  
CRM Test Agency  
Duxberry&Co  
Green & Co  
John Wood's  
Jones & Co


**Lost To Agent**

**Client Advice**

**B** *I* U 

Enter client advice here...

**Notes**

**B** *I* U 

Enter outcome notes here...