LATEST RELEASES

16 July 2026 - VERSION 2.52.0

iam property

CRM RELEASE

16 July 2026 - VERSION 2.52.0

New features

Sales

Additional Merge Tags for Sales Letters

Additional merge tags have been added to **Sales Invoice**, **Sales Offer**, and **Sales Property** letter templates, giving you greater flexibility when creating personalised documents.

The following fields from the **Sales Property** record are now available as merge tags:

- Fee Amount
- Fee Type
- UK Council
- Council Tax Band
- Tenure

These new merge tags allow key property information to be automatically populated into your letter templates, helping to reduce manual editing, improve consistency, and streamline document creation.

Progression Owner Added to Security Roles

The Progression Owner field within **Sales > Property > Offers** can now be managed through **Configuration > Security Roles > Permissions > Sales > Property > Offers.** Administrators can configure whether the field is visible, editable, or mandatory when adding or editing an offer.

This provides greater control over data entry and helps ensure the Progression Owner is captured where required, supporting more consistent sales progression processes and ensuring related documents and merge fields are populated accurately.

Accounts

Saved Print Preferences for BACS PDFs

The **Print to PDF** feature within **Accounts > General > BACS List** now remembers your selected fields between visits.

Once you've chosen the fields to include in your PDF, your preferences are automatically saved and pre-selected the next time you print from the BACS List. This reduces repetitive setup, speeds up document generation, and provides a more streamlined printing experience.

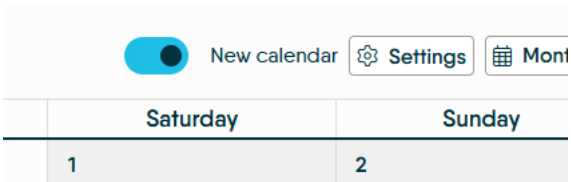
Updates and refinements to the new Calendar v2

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

- The ability to hide cancelled events – bookings for views & appraisals that have since been cancelled can be hidden or shown using the toggle in the calendar
- The ability to show only your events – when sharing a calendar with others it can sometimes get tricky to see where you are supposed to be. We've introduced a toggle on the calendar which allows you to switch between viewing all of your shared calendars and just yours.

As a reminder, you'll see the option to use the new calendar & you can read about the changes below.



Toggle calendar on/off

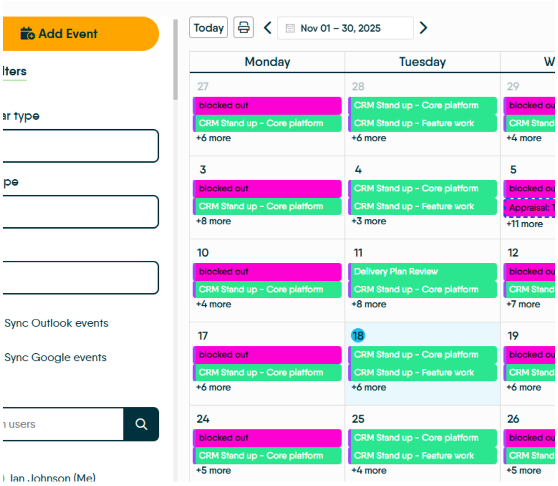
Once we've turned the new calendar on, you'll see a new toggle at the top of the calendar screen showing 'New Calendar'

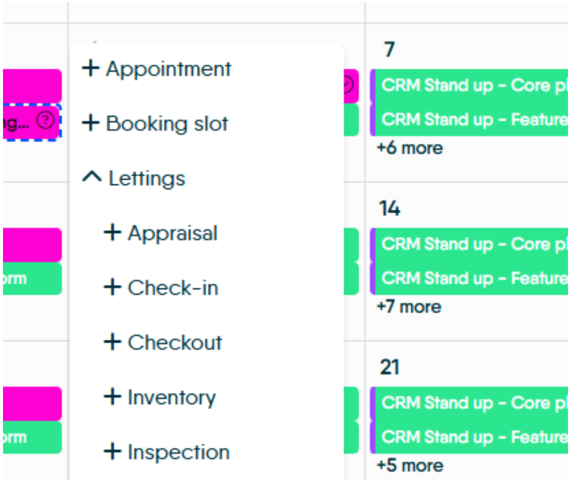
By toggling this on or off you can switch between the new calendar and the existing as you become familiar with the new version.

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.





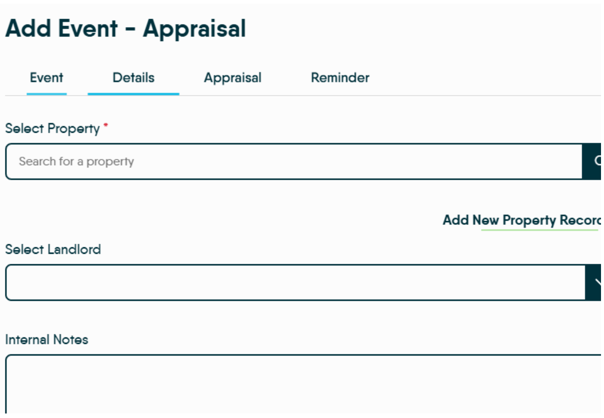
Adding viewings/appraisals

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