

Updated Feature - CRM Matching - Full Guide



As of August 2026. The Matching process in CRM has been updated, this guide shows the updated process.

This guide demonstrates how to effectively match property listings to potential applicants within the CRM. Learn how to update matching criteria, manage applicant preferences, and send automated notifications to interested parties.



Tip! There are some basic things that NEED to be setup for matching to work correctly.

Applicant

The applicant record must be

- Active
- GDPR **Must** have Marketing ON
- Status - any status that is NOT Inactive or Archived
- Minimum of
 - Price range
 - Bedrooms

Property

The property needs to have/be (at minimum)

- Active (Status)
- Price
- Bedrooms/Bathrooms
- Property Type and Style set

Property Setup

1 To make sure a property is properly setup so a good match is made.

Navigate to the property to match.

The screenshot shows the 'iam property' dashboard. The sidebar on the left has a 'Details' tab selected. The main content area is divided into several sections:

- Property Image:** A large photo of a sunroom with a wooden floor and large windows. Below it are five smaller thumbnail images.
- Postcode:** DL1 3EY
- Address:** 35 Kingsway, Darlington, County Durham, DL1 3EY, UK
- Price/Instructed Date:** A section with a 'Prefix' dropdown (set to 'Offers Over'), a 'Price (GBP)' field (set to '£ 165,000'), and a 'Currency' dropdown (set to 'GBP').
- Solicitor/Conveyancing:** A section with a '+Add Solicitor' button and several input fields: 'Solicitor Instructed' (checkbox), 'Instructed Date', 'Solicitor' (dropdown), 'Contact' (dropdown), and 'Address'.
- Calendar:** A calendar view showing dates from 13/08/2026 to 13/09/2026.

2 Click **Marketing**

The screenshot shows the 'iam property' dashboard with the 'Marketing' tab selected in the sidebar. The main content area is divided into several sections:

- Property Image:** A large photo of a sunroom with a wooden floor and large windows. Below it are five smaller thumbnail images.
- Postcode:** DL1 3EY
- Address:** 35 Kingsway, Darlington, County Durham, DL1 3EY, UK
- Price/Instructed Date:** A section with a 'Prefix' dropdown (set to 'Offers Over'), a 'Price (GBP)' field (set to '£ 165,000'), and a 'Currency' dropdown (set to 'GBP').
- Solicitor/Conveyancing:** A section with a '+Add Solicitor' button and several input fields: 'Solicitor Instructed' (checkbox), 'Instructed Date', 'Solicitor' (dropdown), 'Contact' (dropdown), 'Address', 'Email', and 'Phone'.
- Calendar:** A calendar view showing dates from 13/08/2026 to 13/09/2026.
- Fees/Contract:** A section with a 'Fees/Contract' label and a 'Date Property Withdrawn' field.

3

In **"Prices and Matching"** in the Marketing section. Make sure all these options are set correctly

While non of these options are required, they are best practice when creating a matchable property as price and bedrooms are a key initial match criteria. make sure that the **'Advertising Address'** is created and the that the **'Advertising Status'** are also sections that should be completed for matching.

property

My day Lettings Sales Accounts Reporting Communications

Prices and Matching

Currency GBP

Prefix
Offers Over

Price (GBP)
£
165,000

Bedrooms
3

Bathrooms
1

Receptions
2

Property Advertising

Advertise ?
Check this if this Property is Available for Advertising.

New build ?
Check this if this Property is a new Build.

Board Status
No Board

Advertising Address

Advertising Status
Not Advertised

Advertising Url

Virtual Tour Url 1

Virtual Tour Url 2

Premium Listing
Please select a premium listing

Coming to market

Date coming to market

property

My day Lettings Sales Accounts Reporting Communications

Prices and Matching

Currency GBP

Prefix
Offers Over

Price (GBP)
£
165,000

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Not Advertised

Advertising Url

Virtual Tour Url 1

Virtual Tour Url 2

Premium Listing
Please select a premium listing

Coming to market

Date coming to market

4

Matching Property. Set the **'Property type'** and **'Property Style'** this will complete the 'Rightmove...' and 'Zoopla...' field automatically

Not suitable for auction ☐

Reason

Select a reason

Method Of Sale
Private Treaty

Matching Property

Property type
House

Property style
Semi-Detached

Rightmove type

Zoopla type

This also includes On The Market and your agent website.

Property attributes

Property age



Not suitable for auction ☐

Reason

Select a reason

Method Of Sale
Private Treaty

Matching Property

Property type
House

Property style
Semi-Detached

Rightmove type

Zoopla type

This also includes On The Market and your agent website.

Property attributes

Property age



Not suitable for auction

Reason
Select a reason

Method Of Sale
Private Treaty

Matching Property

Property type
House

Property style
Semi-Detached

Rightmove type
Semi-Detached House

Zoopla type
Semi Detached

This also includes On the Market and your agent website.

Property attributes

Property age

5

Review the **Property attributes**, **Property age**, **Custom style**, and **Other** criteria fields. If there is data in these screens, you can select items to provide a further filtered result and gain an extremely accurate match. N.B. this data is used as a secondary sort, selecting the 'Additional Filters' option

Semi-Detached House

Semi Detached

This also includes On The Market and your agent website.

Property attributes

Property age

Custom style

Other criteria

Applicant Matching to Properties

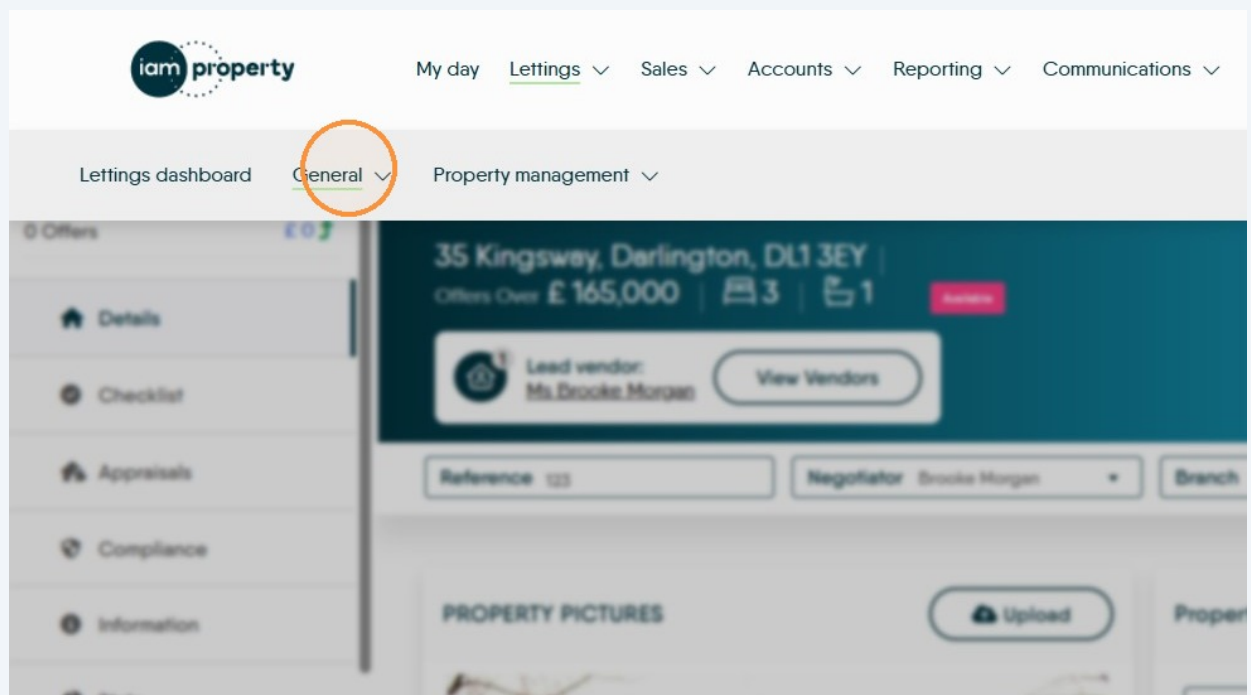
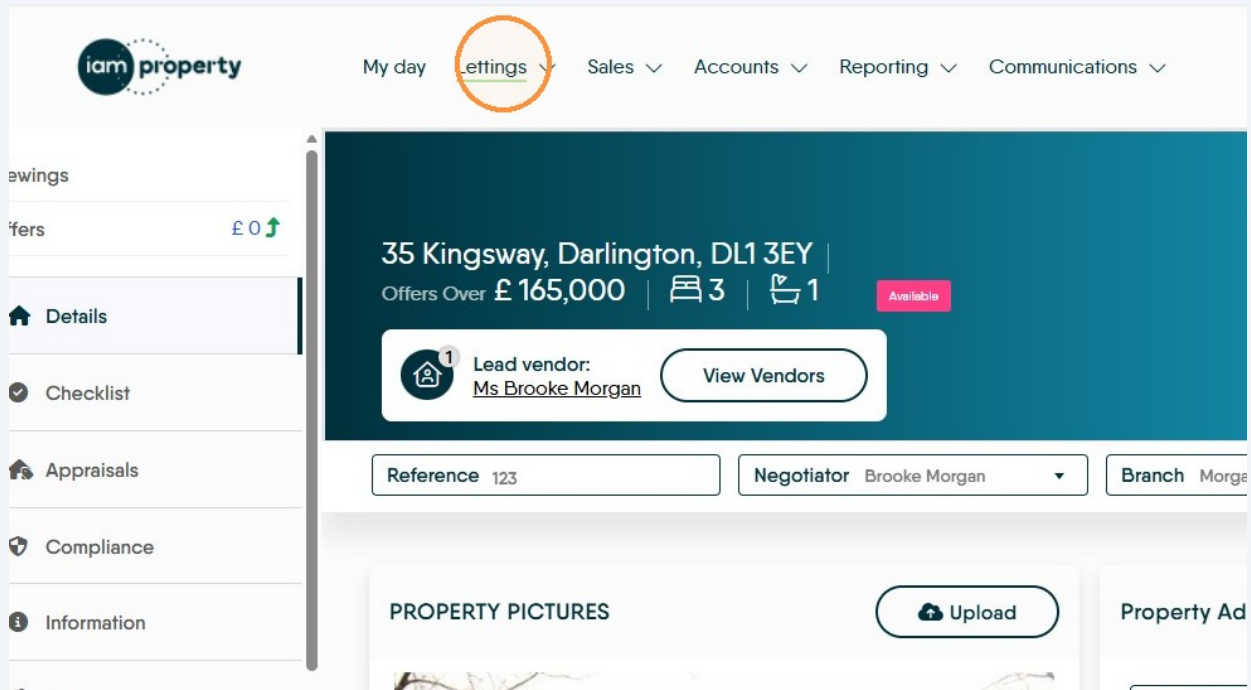
6

Matching a property to applicants, can be done from either the property as below or the Sales pr Lettings menu and the Property Matching option

Click "**Lettings**"

Click "**General**"

Click "**Property Match**"



General

Property Match

Properties

Applicants

Applicant Match

Landlords

Contractors

Letzone

Tenants

Guarantors

7

Click **"Sales"**
Click **"Property Match"**

£ 0 ↑

is

klist

aisals

liance

nation

Refer for

35 Kingsway, Darlington, DL1 3EY |

Offers Over £ 165,000 | 3 | 1

Available

Lead vendor: Ms Brooke Morgan

View Vendors

Reference 123

Negotiator Brooke Morgan ▾

Branch Morgan&Co MB

PROPERTY PICTURES

Upload

Property Address

	Solicitors	Sales Progre
	<u>Property Match</u>	Upload to p
	Applicant Match	Sales Compl
	Reports	E-sign
	Marketing toolkit	

8 From a **Property record**. Click the **Match** icon

iamproperty
CRM
movebutler
iamsold

My day
Lettings
Sales
Accounts
Reporting
Communications

My account

35 Kingsway, Darlington, DL1 3EY |
Offers Over £ 165,000 | 3 | 1

Lead vendor:
Ms Brooke Morgan
View Vendors

Appraisal
WARNING

Reference 123
Negotiator Brooke Morgan
Branch Morgan&Co MB
Status For Sale

Prices and Matching
Currency GBP

Prefix
Offers Over

Price (GBP)
£
165,000

Bedrooms
3

Bathrooms
1

Receptions
2

9

This will show a match to all applicants that have the correct criteria. The basic match is based on (info set on property record);

- Property Location
- Price of property
- Property Type
- Property Style
- Bedrooms Required

Versus (info in Applicant record)

- Location chosen by Applicant (if any)
- **optional** - Registered Since (date applicant added to CRM)
- Price range of applicant
- House Type
- House Style
- Bedrooms

Match to applicants

Matching criteria:

Property: 35 Kingsway, DL1 3EY Darlington, Cou... Location: All Registered since Price: £165,000 Type: House Style: Semi-Detached Bedrooms: 3 [Clear criteria](#) [Update results](#)

[Use additional criteria](#)

Show only: ☐ Hot ☐ My applicants Include: ☐ Previously matched Sort: Registered date (newest) ☐

Showing 1 - 1 of 1 [+ Create viewing](#) [Send SMS](#) [Preview email](#) [Send email](#)

☐	Applicant	Temperature	Price range	Applicant area(s)	Registered date	Email	Mobile	Phone
☐	Sales' Applicant291		£130,000 - £170,000	Hurworth-on-Tees, Darlin...	11/08/2026	zagg.dave@gmail.c...		

10

The **Location** filter, this allows the area specified by the applicant to be used, or not used. It is an option in configuration and can be enabled as a default ON so the customers area choice is used for the match (Click "**Property area only**"), or OFF so the customers default area choice is not used as part of the match (Click "**All**").

Match to applicants

Matching criteria:

Property: 35 Kingsway, DL1 3EY Darlington, Cou... ▼

Location: All ▼

Registered since ▼

Price: £165,000 ▼

Type: ▼

Style: Semi-Detached ▼

Bedrooms: 3 ▼

[Clear criteria](#)

[Use additional criteria](#)

Show only: ☐ Hot ☐ My applicants Include: ☐ Previously matched

Showing 1 – 1 of 1

[+ Create viewing](#)

[Send](#)

☐	Applicant	Temperature	Price range	Applicant area(s)	Registered date	Em
☐	Sales' Applicant291		£130,000 – £170,000	Hurworth-on-Tees, Darlin...	11/08/2026	z

Match to applicants

Matching criteria:

Property: 35 Kingsway, DL1 3EY Darlington, Cou... ▼

Location: All ▼

Registered since ▼

Price: £165,000 ▼

Type: ▼

Style: Semi-Detached ▼

Bedrooms: 3 ▼

Clear

[Use additional criteria](#)

Show only: ☐ Hot ☐ My applicants Include

- ☒ All
- ☐ Property area only

[Reset](#)

Showing 1 – 1 of 1

[+ Create viewing](#)

[Send](#)

☐	Applicant	Temperature	Price range	Applicant area(s)	Registered date	Em
☐	Sales' Applicant291		£130,000 – £170,000	Hurworth-on-Tees, Darlin...	11/08/2026	z

Match to applicants

Matching criteria:

Property: 35 Kingsway, DL1 3EY Darlington, Cou... ▼

Location: Property area only ▼

Registered since ▼

Price: £165,000 ▼

Style: Semi-Detached ▼

Bedrooms: 3 ▼

Clear

☐ All

☒ Property area only

Reset

[Use additional criteria](#)

Show only: ☐ Hot ☐ My applicants Include: ☐ Previously matched

Showing 1 - 1 of 1

[+ Create viewing](#)

[Send SMS](#)

☐	Applicant	Temperature	Price range	Applicant area(s)	Registered date	Email
☐	Sales' Applicant291		£130,000 - £170,000	Hurworth-on-Tees, Darlin...	11/08/2026	zag...

11 Click **"Update results"** if any changes to the option have been made.

iampropertyCRMmovebutleriamsold

property

My dayLettings ▼Sales ▼Accounts ▼Reporting ▼Communications ▼

My account

Match to applicants

Matching criteria:

Property: 35 Kingsway, DL1 3EY Darlington, Cou... ▼ Location: Property area only ▼ Registered since ▼ Price: £165,000 ▼ Type: House ▼

Style: Semi-Detached ▼ Bedrooms: 3 ▼ Clear criteria

[Use additional criteria](#)

Show only: ☐ Hot ☐ My applicants Include: ☐ Previously matched Sort: Registered date (newest) ▼

1 - 1 of 1

[+ Create viewing](#) [Send SMS](#) [Preview email](#) [Send email](#)

Applicant	Temperature	Price range	Applicant area(s)	Registered date	Email	Mobile	Phone
Sales' Applicant291		£130,000 - £170,000	Hurworth-on-Tees, Darlin...	11/08/2026	zagg.dave@gmail.c...		

12 Click **"Price: £165,000"** to edit the property price
Open the Price filter

Match to applicants

Matching criteria:

Property: 35 Kingsway, DL1 3EY Darlington, Cou... Location: Property area only Registered since Price: £165,000 Type: House
Style: Semi-Detached Bedrooms: 3 Clear criteria

Use additional criteria

Show only: ☐ Hot ☐ My applicants Include: ☐ Previously matched

Sort: Registered

Showing 1 - 1 of 1

+ Create viewing

Send SMS

Preview email

☐	Applicant	Temperature	Price range	Applicant area(s)	Registered date	Email
☐	Sales' Applicant291		£130,000 - £170,000	Hurworth-on-Tees, Darlin...	11/08/2026	zagg.dave@gmail.c...

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Lettings Sales Accounts Reporting Communications



My account

Property: 35 Kingsway, DL1 3EY Darlington, Cou... Location: Property area only Registered since Price: £165,000 Type: House
Style: Semi-Detached Bedrooms: 3 Clear criteria

Update results

Price

£ 165,000

Reset

Show only: ☐ Previously matched

Sort: Registered date (newest)

+ Create viewing

Send SMS

Preview email

Send email

Temperature Price range Applicant area(s) Registered date Email Mobile Phone

13 Once a match has been made, there are various options.

- Create a Viewing
- Send the Property Details by Email (tracked or not tracked)
- Send details by SMS

14

Click **"Create viewing"**

Complete all the detail required to book a viewing, property/vendor and applicant details will already be showing.

h to applicants

g criteria:

ty: 35 Kingsway, DL1 3EY Darlington, Cou... Location: All Registered since Price: £165,000 Type: House

semi-Detached Bedrooms: 3 Clear criteria

Update results

ditional criteria

v only: ☐ Hot ☐ My applicants Include: ☐ Previously matched

Sort: Registered date (newest)  

All selected

+ Create viewing

Send SMS

Preview email

▼

Send email

▼

Cancel

Applicant	Temperature	Price range	Applicant area(s)	Registered date	Email	Mobile	Phone
Sales' Applicant291		£130,000 - £170,000	Hurworth-on-Tees, Darlin...	11/08/2026	zagg.dave@gmail.c...		

Applicant missing from match results?

Check they are not excluded from matches, and that their GDPR is set to allow marketing

Add new viewing

Details

Feedback

Details

Viewing Multiple Properties



Event title

Viewing - 35 Kingsway, Darlington, County Durham, DL1 3EY

Status

Booked

Viewing Confirmed



Applicant

Select Applicant

Sales' Applicant291

+ Add New Applicant

Sales' Applicant291

7393 Pelaw Crescent, Chester le Street, County Durham, DH2 2HX, UK

Mobile: Email: zagg.dave@gmail.com



Add new call

Send SMS

Send Email

Cancel

Delete

Save Viewing

15

Click **"Preview email"** to send a message containing the property detail in a template. Reviewing the message before sending it.

1 to applicants

g criteria:

y: 35 Kingsway, DL1 3EY Darlington, Cou... Location: All Registered since Price: £165,000 Type: House

emi-Detached Bedrooms: 3 Clear criteria

Update results

tional criteria

only: ☐ Hot ☐ My applicants Include: ☐ Previously matched

Sort: Registered date (newest)

All selected

+ Create viewing

Send SMS

Preview email

Send email

Cancel

Applicant	Temperature	Price range	Applicant area(s)	Registered date	Email	Mobile	Phone
Sales' Applicant291		£130,000 - £170,000	Hurworth-on-Tees, Darlin...	11/08/2026	zagg.dave@gmail.c...		

Applicant missing from match results?

Check they are not excluded from matches, and that their GDPR is set to allow marketing.

16

Review the property email preview
Click the **"Subject:"** field and add a subject.
Click **"Send Email"**

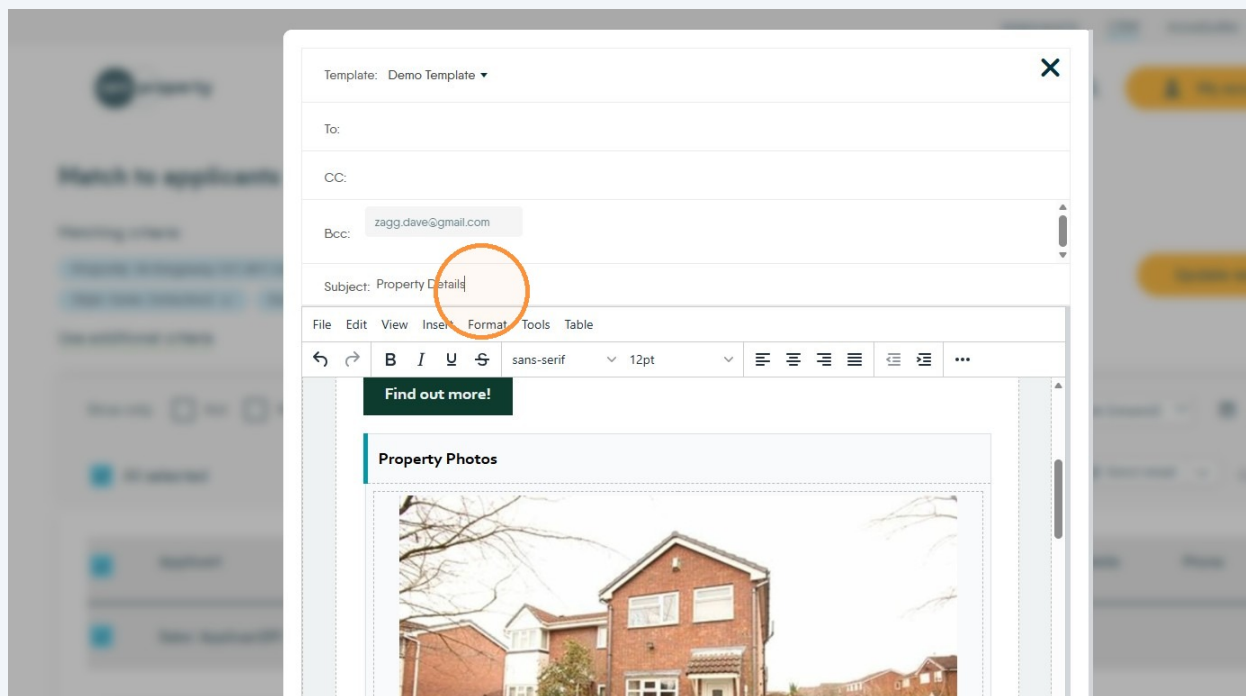
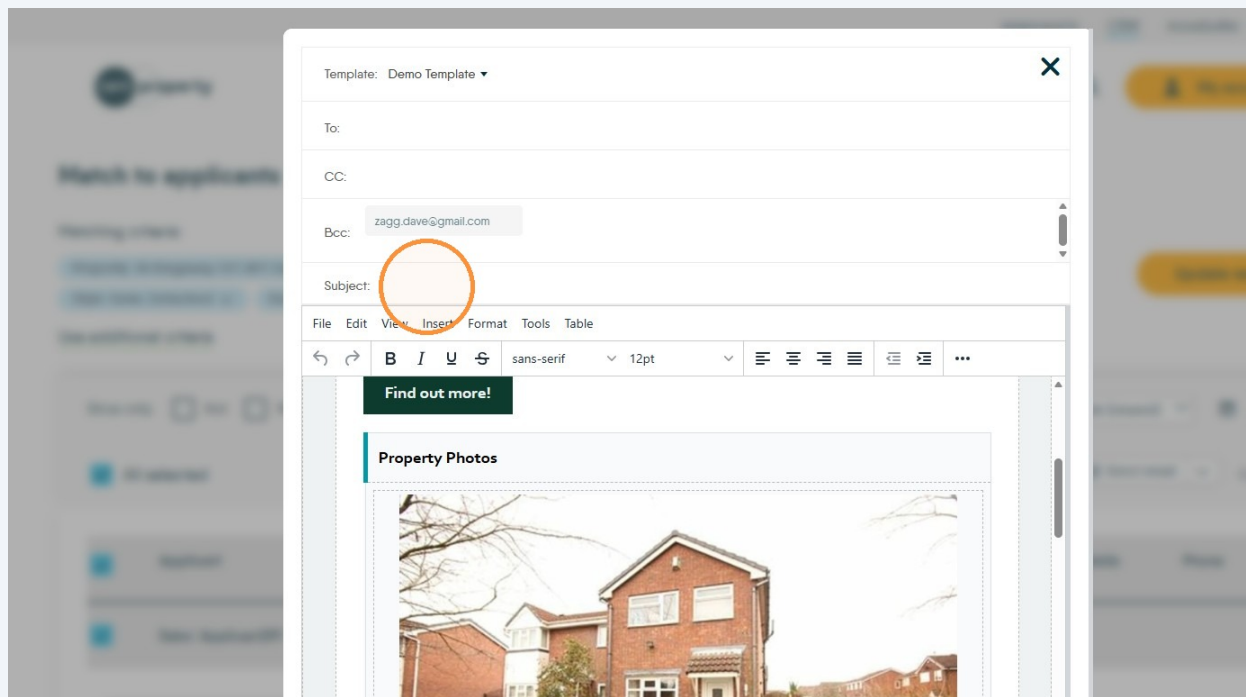
£165,000

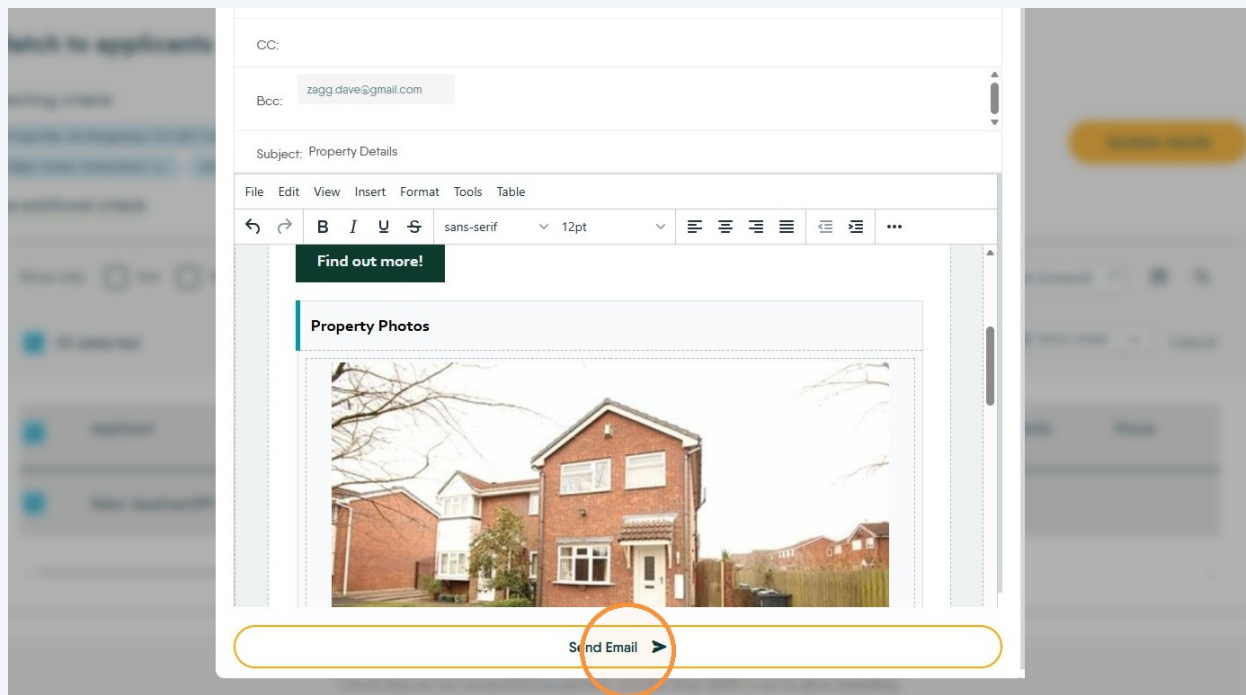
Dear ,

I'm pleased to share details of a property that may match your requirements.

You can click the link below to view full details including photos, map, aerial imagery and brochure (where available).

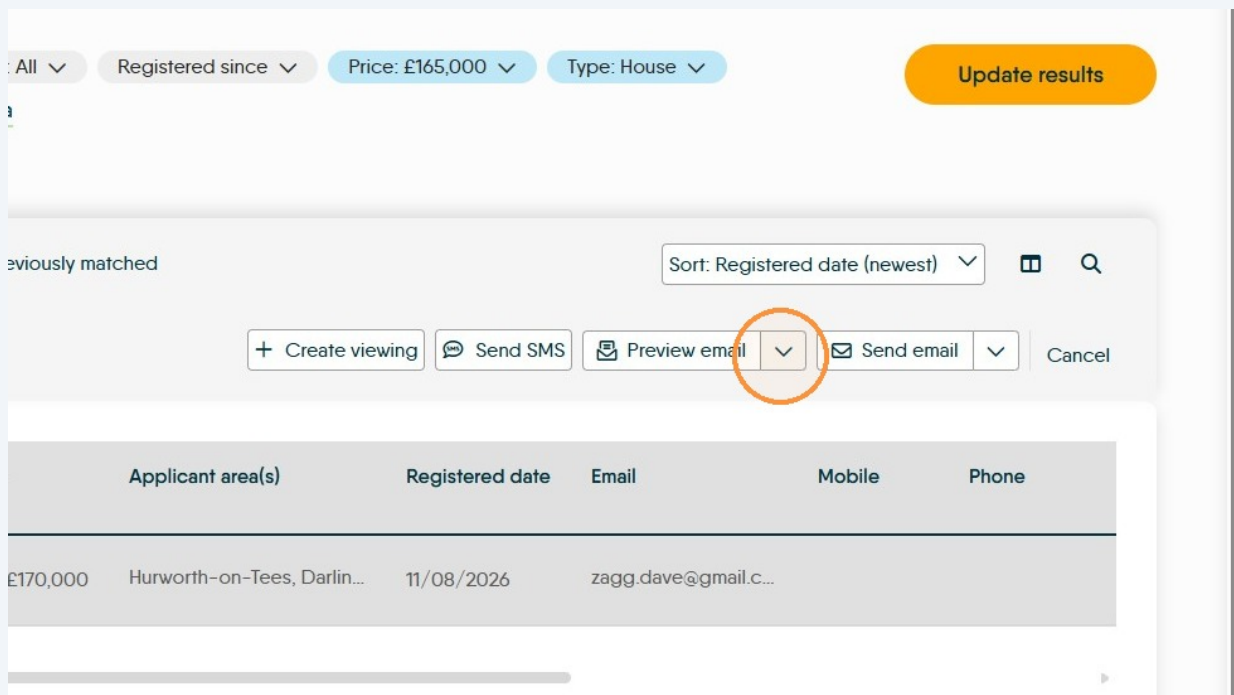
Find out more!

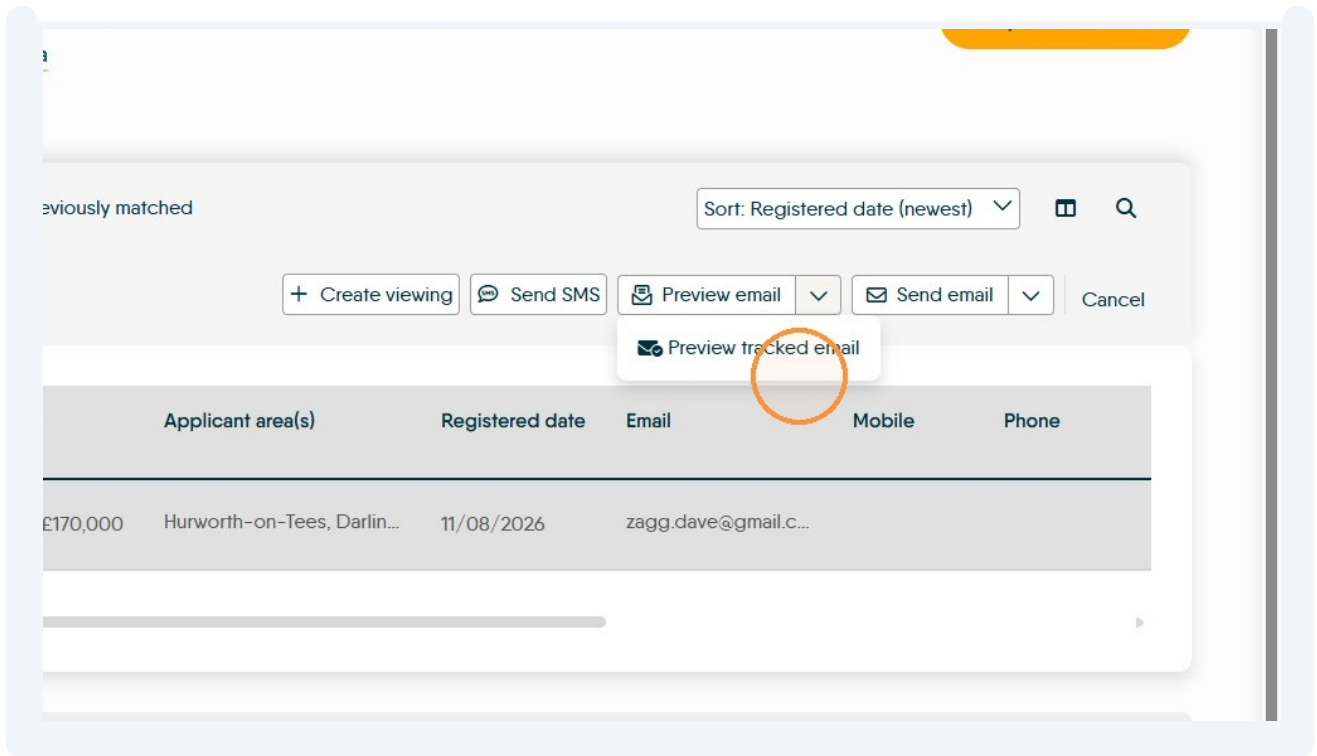




17

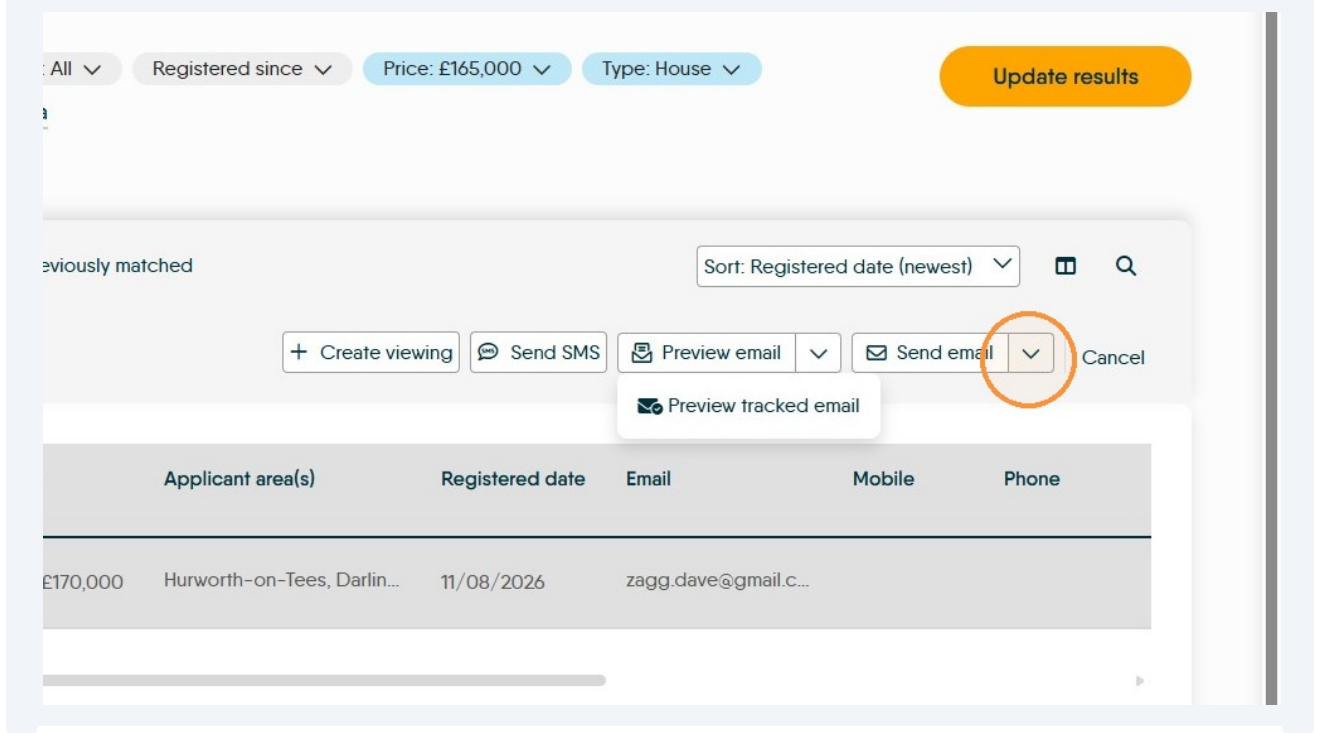
To **send a tracked email**. Open the email action menu.
Click "**Preview tracked email**"





18

Or to **send and not preview the email**. Open the tracked email action menu
Click "**Send tracked email**"



Previously matched

Sort: Registered date (newest) ▼



+ Create viewing

Send SMS

Preview email ▼

Send email ▼

Cancel

Send tracked email

Applicant area(s)	Registered date	Email	Mobile	Phone
£170,000 Hurworth-on-Tees, Darlin...	11/08/2026	zagg.dave@gmail.c...		

19

To edit the columns visible on screen, click **"Toggle columns"**
Select the columns you wish to view on your screen. Close the menu.
Click **"Update results"**

Sort: Registered date (newest) ▼



+ Create viewing

Send SMS

Preview email ▼

Send email ▼

Cancel

Applicant area(s)	Registered date	Email	Mobile	Phone
Hurworth-on-Tees, Darlin...	11/08/2026	zagg.dave@gmail.c...		

Previously matched

Sort: Registered date (newest)

+ Create viewing

Send SMS

Preview email

Search

☒ Applicant
 ☒ Temperature
 ☒ Price range
 ☒ Applicant(s) Area
 ☒ Registered date
 ☒ Email
 ☒ Mobile
 ☒ Phone
 ☒ Bedrooms

Applicant area(s)	Registered date	Email
£170,000 Hurworth-on-Tees, Darlin...	11/08/2026	zagg.dave@gmail...

Applicant missing from match results?
 e not excluded from matches, and that their GDPR is set to allow marketing.

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property

My day Lettings Sales Accounts Reporting Communications

My account

o applicants

Criteria:

5 Kingsway, DL1 3EY Darlington, Cou...

Location: All

Registered since

Price: £165,000

Type: House

-Detached

Bedrooms: 3

Clear criteria

Update results

Additional criteria

☐ Hot
 ☐ My applicants
 Include: ☐ Previously matched

Sort: Registered date (newest)

selected

+ Create viewing

Send SMS

Preview email

Send email

Cancel

Applicant	Temperature	Price range	Applicant area(s)	Registered date	Email	Mobile	Phone
Sales' Applicant291		£130,000 - £170,000	Hurworth-on-Tees, Darlin...	11/08/2026	zagg.dave@gmail.c...		

Applicant Criteria

20

Applicant Criteria is set on the **"Details"** screen of an Applicant record. There are some basic settings that must be made to make an applicant record able to match with property records. We will show these below and then

19

21 Click "Set GDPR"

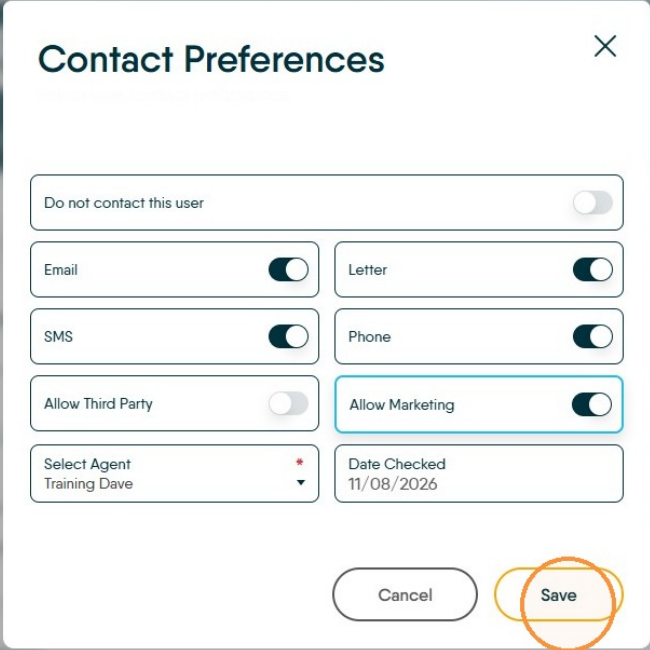
The screenshot shows the CRM interface for a contact record. The top navigation bar includes 'iamproperty', 'CRM', 'movebutler', and 'iamsold'. The main header displays the contact's name 'Sales Applicant291' and email 'zagg.dave@gmail.com'. A blue box highlights the 'Set GDPR' button in the top right corner. Below the header, the contact's address is listed as '7393 Pelaw Crescent, Chester le Street, County Durham'. The 'Personal Information' section contains fields for Title, Forename, Surname, Company Name, Website, Phone Number, Work phone, Mobile phone, Email Address, Salutation, Source, and Temperature. The 'Applicant Address' section is partially visible at the bottom.

22 Ensure the "Allow Marketing" is selected.

It is good practice to enable these settings as default through all of your records from the 'Configuration' menu.

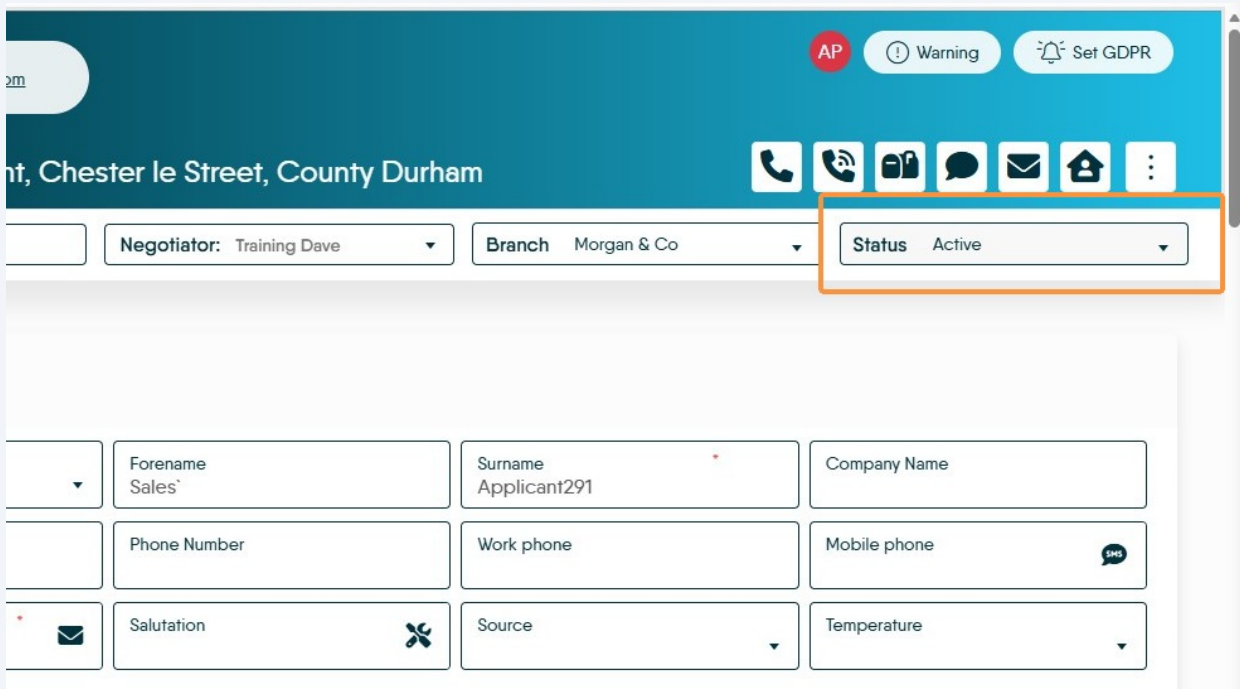
The screenshot shows the 'Contact Preferences' dialog box. The dialog has a title bar with a close button. The main content area contains several toggle switches: 'Do not contact this user' (off), 'Email' (on), 'SMS' (on), 'Allow Third Party' (off), 'Letter' (on), 'Phone' (on), and 'Allow Marketing' (on). The 'Allow Marketing' toggle is highlighted with an orange box. Below the toggles, there is a 'Select Agent' dropdown menu showing 'Training Dave' and a 'Date Checked' field showing '11/08/2026'. At the bottom of the dialog are 'Cancel' and 'Save' buttons.

23 Click "**Save**"



The image shows a 'Contact Preferences' dialog box with a close button (X) in the top right corner. The dialog contains several toggle switches and a date field. The 'Do not contact this user' toggle is off. The 'Email', 'Letter', 'SMS', and 'Phone' toggles are all on. The 'Allow Third Party' toggle is off. The 'Allow Marketing' toggle is on and is highlighted with a blue border. Below these toggles, there is a 'Select Agent' dropdown menu showing 'Training Dave' with a red asterisk, and a 'Date Checked' field showing '11/08/2026'. At the bottom of the dialog are 'Cancel' and 'Save' buttons. The 'Save' button is highlighted with an orange circle.

24 Set the **Status** field to any option other than 'Inactive' or 'Archived'. This is a user definable field so there are many options available.



The image shows a user profile form. At the top, there is a blue header bar with a red 'AP' badge, a 'Warning' button, and a 'Set GDPR' button. Below the header, the user's name 'nt, Chester le Street, County Durham' is displayed. To the right of the name are icons for phone, fax, lock, speech bubble, envelope, home, and a menu icon. Below the name, there are three dropdown menus: 'Negotiator' set to 'Training Dave', 'Branch' set to 'Morgan & Co', and 'Status' set to 'Active'. The 'Status' dropdown is highlighted with an orange box. Below these dropdowns, there is a form with several fields: 'Forename' (Sales), 'Surname' (Applicant291), 'Company Name', 'Phone Number', 'Work phone', 'Mobile phone' (with a 'SMS' icon), 'Salutation' (with an envelope icon and a close icon), 'Source', and 'Temperature'.

25

On the **"Details"** screen of an Applicant record scroll down the screen to **'Applicant Criteria'**

Applicant Criteria

Search for area
Enter a location

Miles
1/4 Mile

Add area

Hurworth-on-Tees, Darlington Chester-le-Street, UK + 5 Miles Darlington, UK + 3 Miles

Min Price £130,000 Max Price £170,000

Minimum Bedrooms: 2 Minimum Bathrooms: 1

Move In Date: 11/08/2026 Buyer Position

Property type

Search property type

House ☒ Apartment ☐ Flat ☐ Maisonette ☐ Bungalow ☐ Other ☐ Land ☐

Property style

Search property style

Detached ☐ End Terrace ☐ House Share ☐ Link Detached ☐ Mews ☐ Semi-Detached ☒ Terraced ☐

26

Click the **"Search for area"** field. This allows the applicant to specify an area where they are looking for a property. This can be a point of interest (school, church etc), a street, postcode (part or full), town.

Applicant Criteria

Search for area
Enter a location

Miles
1/4 Mile

Add area

Hurworth-on-Tees, Darlington Chester-le-Street, UK + 5 Miles Darlington, UK + 3 Miles

Min Price £130,000 Max Price £170,000

Minimum Bedrooms: 2 Minimum Bathrooms: 1

Move In Date: 11/08/2026 Buyer Position

Property type

Search property type

House ☒ Apartment ☐ Flat ☐ Maisonette ☐ Bungalow ☐

Property style

Search property style

Detached ☐ End Terrace ☐ House Share ☐ Link Detached ☐ Mews ☐ Semi-Detached ☒ Terraced ☐

- 27 Open the **Miles** dropdown, select a radius around the search area set, from 1/4 mile to 40 miles.

Applicant Criteria

Search for area
Enter a location

Miles
1/4 Mile

Add area

Hurworth-on-Tees, Darlington Chester-le-Street, UK + 5 Miles Darlington, UK + 3 Miles

Min Price £130,000 Max Price £170,000

Minimum Bedrooms - 2 + Minimum Bathrooms - 1 +

Move In Date
11/08/2026

Buyer Position

Property type

Search property type

House Apartment Flat Maisonette Bungalow

Property style

Search property style

Detached End Terrace House Share Link Detached

- 28 Once area and radius is set click **"Add area"**

iamproperty CRM movebutler iamsold

property My day Lettings Sales Accounts Reporting Communications

£0.00

49 11/08/2026

Applicant Criteria

Search for area
Enter a location

Miles
1/4 Mile

Add area

Hurworth-on-Tees, Darlington Chester-le-Street, UK + 5 Miles Darlington, UK + 3 Miles

Min Price £130,000 Max Price £170,000

Minimum Bedrooms - 2 + Minimum Bathrooms - 1 +

Move In Date
11/08/2026

Buyer Position

Property type

Search property type

House Apartment Flat Maisonette Bungalow

Property style

Search property style

Detached End Terrace House Share Link Detached



Tip! For Information - the area selected is the centre of a square shape, although it can be edited it will always be square/rectangular.

Edit area with map



Area name *

Hurworth-on-Tees, Darlington

Change the size or position of the square on the map to change the applicant area



Save area

29 Review the applicant's match areas check and edit/delete if required.

property CRM movebutler iamsold

My day Lettings Sales Accounts Reporting Communications

£0.00

49 11/08/2026

licants

Applicant Criteria

Search for area
Enter a location

Miles
1/4 Mile

Add area

Hurworth-on-Tees, Darlington Chester-le-Street, UK + 5 Miles Darlington, UK + 3 Miles

Min Price £130,000 Max Price £170,000

Minimum Bedrooms 2 Minimum Bathrooms 1

Move In Date
11/08/2026

Buyer Position

Property type

Search property type

House Apartment Flat Maisonette

Property style

Search property style

Detached End Terrace House Share Link Detached

30 Click here and set the minimum and maximum price the applicant is looking to spend.

Applicant Criteria

Search for area
Enter a location

Miles
1/4 Mile

Hurworth-on-Tees, Darlington Chester-le-Street, UK + 5 Miles Darlington, UK + 3 Miles

Min Price £130,000 Max Price £170,000

Minimum Bedrooms 2 Minimum Bathrooms 1

Move In Date
11/08/2026

Buyer Position

Property type

Search property type

House Apartment Flat Maisonette

Property style

Search property style

Detached End Terrace House Share Link Detached

Applicant Criteria

Search for area Enter a location		Q	Miles 1/4 Mile				
Hurworth-on-Tees, Darlington		Chester-le-Street, UK + 5 Miles		Darlington, UK + 3 Miles			
Min Price	£ 130,000	Max Price	£ 170,000	Minimum Bedrooms		Minimum Bathroom	
				-	2	+	-
Move In Date 11/08/2026				Buyer Position			
Property type				Property style			
Search property type				Search property style			
House				Detached			
Apartment				End Terrace			
Flat				House Share			



Alert! No applicant is looking to spend £0 on a property, if they have no lower limit please create one. It will make your matches more accurate and better for your client.

The same applies for Bedrooms and bathrooms, for bedrooms this is the minimum number of bedrooms the match will show anything with more than the number you add and never less.

31

Click '**Minimum Bedrooms**' to add the minimum number of bedrooms and **Minimum Bathrooms** the applicant is looking for.

iamproperty CRM movebutler iamsold

property My day Lettings Sales Accounts Reporting Communications

£0.00

49 11/08/2026

licants

Applicant Criteria

Search for area
Enter a location

Miles
1/4 Mile

Add area

Hurworth-on-Tees, Darlington Chester-le-Street, UK + 5 Miles Darlington, UK + 3 Miles

Min Price: £130,000 Max Price: £170,000

Minimum Bedrooms: - 2 +

Minimum Bathrooms: - 1 +

Move In Date: 11/08/2026

Buyer Position

Property type

Search property type

House ☒

Apartment ☐

Flat ☐

Maisonette ☐

Property style

Search property style

Detached ☐

End Terrace ☐

House Share ☐

Link Detached ☐

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£0.00

49 11/08/2026

licants

Applicant Criteria

Search for area
Enter a location

Miles
1/4 Mile

Add area

Hurworth-on-Tees, Darlington Chester-le-Street, UK + 5 Miles Darlington, UK + 3 Miles

Min Price: £130,000 Max Price: £170,000

Minimum Bedrooms: - 2 +

Minimum Bathrooms: - 1 +

Move In Date: 11/08/2026

Buyer Position

Property type

Search property type

House ☒

Apartment ☐

Flat ☐

Maisonette ☐

Property style

Search property style

Detached ☐

End Terrace ☐

House Share ☐

Link Detached ☐

32

Click **"Property type"** and set the type of property the applicant is looking for. Click **"Property style"** to pick the type of property the applicant is seeking.

Hurworth-on-Tees, Darlington

Chester-le-Street, UK + 5 Miles

Darlington, UK + 3 Miles

Min Price £130,000

Max Price £170,000

Minimum Bedrooms

–

2

+

Minimum Bathrooms

–

1

+

Move In Date
11/08/2026

Buyer Position

Property type

Search property type

House



Apartment



Flat



Maisonette



Bungalow



Other



Land



Property style

Search property style

Detached



End Terrace



House Share



Link Detached



Mews



Semi-Detached



Terraced



£0.00

Applicant Criteria

Search for area
Enter a location



Miles
1/4 Mile

Add area

Hurworth-on-Tees, Darlington

Chester-le-Street, UK + 5 Miles

Darlington, UK + 3 Miles

Min Price £130,000

Max Price £170,000

Minimum Bedrooms

–

2

+

Minimum Bathrooms

–

1

+

Move In Date
11/08/2026

Buyer Position

Property type

Search property type

House



Apartment



Flat



Maisonette



Bungalow



Other



Land



Property style

Search property style

Detached



End Terrace



House Share



Link Detached



Mews



Semi-Detached



Terraced



licants

33 Click "Save" to save the changes.

£0.00

✓

11/08/2026

licants

Applicant Criteria

Search for area

Enter a location

Q

Miles

1/4 Mile

▼

📍

Add area

Hurworth-on-Tees, Darlington

Chester-le-Street, UK + 5 Miles

Darlington, UK + 3 Miles

Min Price

£ 130,000

Max Price

£ 170,000

Minimum Bedrooms

-

2

+

Minimum Bathrooms

-

1

+

Move In Date

11/08/2026

Buyer Position

▼

Property type

Search property type

House

Apartment

Flat

Maisonette

Bungalow

Other

Land

House

Property style

Search property style

Detached

End Terrace

House Share

Link Detached

Mews

Semi-Detached

Terraced

Save Changes

🔒

34 If required you can select options from the;

- Property Attributes
- Rightmove Type
- Property Age
- Custom Style
- Other Criteria

These are all 'lookups' and as such are defined by your own requirements and added by yourselves or as part of a data migration.

These are used as part of the extended matching process when the '**Use Additional Criteria**' option is selected.

The screenshot displays a property search interface with several filter categories, each with a search bar and a list of options with toggle switches. The categories are:

- Property attributes:** Single Garage, Parking, Garden.
- Property age:** Search Property Age, Period, Pre-war, Post-war, Modern.
- Rightmove type:** Search Property Type, Apartment, Bar/Nightclub, Barn, Barn Conversion.
- Custom style:** Search Property Style, 30's Semi, Addison Homes, Georgian, Victorian.
- Other Criteria:** Potential Vendor, Double Glazing.

A sidebar on the left shows a price filter set to £0.00, a date filter set to 11/08/2026, and a list of agents. A yellow circle with the number 13 is located in the bottom right corner of the filter panel.

35

To match your applicant against the properties you have on your CRM click the **'Match'** icon.

The screenshot shows the CRM interface for a sales applicant. At the top, there's a navigation bar with 'My day', 'Lettings', 'Sales', 'Accounts', 'Reporting', and 'Communications'. A search bar and a 'My account' button are on the right. The main header area displays the applicant's name 'Sales Applicant291', email 'zagg.dave@gmail.com', and address '7393 Pelaw Crescent, Chester le Street, County Durham'. A 'Match' icon (a house with a plus sign) is circled in orange. Below the header, there are fields for 'Reference', 'Negotiator' (Training Dave), 'Branch' (Morgan & Co), and 'Status' (Active). The 'Personal Information' section contains fields for Title, Forename (Sales), Surname (Applicant291), Company Name, Website, Phone Number, Work phone, Mobile phone, Email Address (zagg.dave@gmail.com), Salutation, Source, and Temperature. An 'Applicant Address' section is partially visible at the bottom.

Property Matching

36

This will create a match based on the highlighted **'Matching Criteria'**

The screenshot shows the 'Match to properties' interface. The 'Matching criteria' section is highlighted with an orange box and contains the following filters: Applicant: Sales Applicant291, Location: Applicant's match areas, Price: £130,000 - £170,000, Type: House, Style: Semi-Detached, and Min bedrooms: 2. There is a 'Clear criteria' link and an 'Update results' button. Below the criteria, there are checkboxes for 'Include' (Under offer, Sold SSTC, Not advertised, Previously matched) and a 'Sort' dropdown (Current price (high to low)). A 'View: Grid' dropdown is also present. At the bottom, there are two property images, both marked 'Available'. The interface also includes a 'Select all' checkbox, 'Showing 1 - 2 of 2', and buttons for '+ Create viewing', 'Send SMS', 'Preview email', and 'Send email'.

37 To further filter the match, click "Use additional criteria"

The screenshot shows the 'Match to properties' section of the iamproperty CRM. The matching criteria are: Applicant: Sales' Applicant291, Location: Applicant's match areas, Price: £130,000 - £170,000, Type: House, Style: Semi-Detached, and Min bedrooms: 2. The 'Use additional criteria' button is highlighted with an orange box. Below the criteria, there are checkboxes for 'Include: Under offer, Sold SSTC, Not advertised, Previously matched' and a 'Sort: Current price (high to low)' dropdown. The 'View: Grid' option is selected. The results show two properties, both marked 'Available'.

38 There are also options to include other filter options, sort and alter the view.

The screenshot shows the 'Match to properties' section of the iamproperty CRM. The matching criteria are: Applicant: Sales' Applicant291, Location: Applicant's match areas, Price: £130,000 - £170,000, Type: House, Style: Semi-Detached, Min bedrooms: 2, Min bathrooms: 1, Min receptions, and Rightmove type. The 'Use default criteria' button is highlighted with an orange box. Below the criteria, there are checkboxes for 'Include: Under offer, Sold SSTC, Not advertised, Previously matched' and a 'Sort: Current price (high to low)' dropdown. The 'View: Grid' option is selected. The results show two properties, both marked 'Available'. Below each property image, there is a checkbox labeled 'Select this property' and the address: 8712 Pelaw Crescent, Chester le Street, County... and 74748 Pelaw Crescent, Chester le Street, County...

39

Click **"View: Grid"** this will allow the view to be changed from a grid view to a list view

iam property My day Lettings Sales Accounts Reporting Communications      My account

[default criteria](#)

Include: ☐ Under offer ☐ Sold SSTC ☐ Not advertised ☐ Previously matched Sort: Current price (high to low) View: Grid 

☐ Select all Showing 1 - 2 of 2  Create viewing  Send SMS  Preview email 




☐ Select this property

**8712 Pelaw Crescent,
Chester le Street, County...**

OIRO £160,000

 3  1  2

Instructed date: 28/07/2026
Last Matched Date: N/A




☐ Select this property

**74748 Pelaw Crescent,
Chester le Street, County...**

Offers In Excess Of £154,000

 3  1  2

Instructed date: 16/07/2026
Last Matched Date: N/A

Access to properties

Filtering criteria:

Applicant: Sales Applicant291 Location: Applicant's match areas Price: £130,000 - £170,000 Type: House

Style: Semi-Detached Min bedrooms: 2 Min bathrooms: 1 Min receptions Rightmove type [Clear criteria](#)

Update results

[default criteria](#)

Include: ☐ Under offer ☐ Sold SSTC ☐ Not advertised ☐ Previously matched Sort: Current price (high to low) View: Table  

Showing 1 - 2 of 2  Create viewing  Send SMS  Preview email   Send email 

☐	Property address	Advertising status	Current price	Bedrooms	Prop Type	Prop Styles	Instructed date
☐	8712 Pelaw Crescent, Chester le Street, County Durham, DH2 2HX	Available	OIRO £160,000	3	House	Semi-Detached	28/07/2026
☐	74748 Pelaw Crescent, Chester le Street, County Durham, DH2 2HX	Available	Offers In Excess Of £154,000	3	House	Semi-Detached	16/07/2026

40

The "column selector" will allow you the choice of columns to show on the screen, as few or as many as you wish.

Criteria:

Sales' Applicant291 Location: Applicant's match areas Price: £130,000 - £170,000 Type: House

-Detached Min bedrooms: 2 Min bathrooms: 1 Min receptions Rightmove type Clear criteria

Update results

criteria

☐ Under offer ☐ Sold SSTC ☐ Not advertised ☐ Previously matched

Sort: Current price (high to low) View: Table

1 - 2 of 2

+ Create viewing Send SMS Preview email

Property address	Advertising status	Current price	Bedrooms	Prop Type
8712 Pelaw Crescent, Chester le Street, County Durham, DH2 2HX	Available	OIRO £160,000	3	House
74748 Pelaw Crescent, Chester le Street, County Durham, DH2 2HX	Available	Offers In Excess Of £154,000	3	House

Property missing from match results?

Check the criteria you've selected, that the property is marked to advertise, and the advertising status matches yours

Search

- ☐ Bathrooms
- ☐ Receptions
- ☐ Negotiator
- ☐ No. of viewings
- ☒ Last viewing
- ☐ Last offer received
- ☐ Branch
- ☐ Last matched date
- ☐ Last matched by

Reset Cancel Save

41

Open the 'Location' filter options to either add or remove the Location filter.

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Matching criteria:

Applicant: Sales' Applicant291 Location: Applicant's match areas Price: £130,000 - £170,000 Type: House

Style: Semi-Detached Min bedrooms: 2 Min bathrooms: 1 Min receptions Rightmove type Clear criteria

Update results

Use default criteria

☐ All ☒ Applicant's area(s) only

Reset

Include: ☐ Under offer ☐ Previously matched

Sort: Current price (high to low) View: Table

Showing 1 - 2 of 2

+ Create viewing Send SMS Preview email Send email

☐	Property address	Advertising status	Current price	Bedrooms	Prop Type	Prop Styles	Instructed date	Last
☐	8712 Pelaw Crescent, Chester le Street, County Durham, DH2 2HX	Available	OIRO £160,000	3	House	Semi-Detached	28/07/2026	28/
☐	74748 Pelaw Crescent, Chester le Street, County Durham, DH2 2HX	Available	Offers In Excess Of £154,000	3	House	Semi-Detached	16/07/2026	24/

42 Clicking on the Property Address will open a **Property Preview** screen

Matching criteria:

Applicant: Sales' Applicant291 ▾ Location: Applicant's match areas ▾ Price: £130,000 - £170,000 ▾ Type: House ▾
Style: Semi-Detached ▾ Min bedrooms: 2 ▾ Min bathrooms: 1 ▾ Min receptions ▾ Rightmove type ▾ [Clear criteria](#)

Update re

[Use default criteria](#)

Include: ☐ Under offer ☐ Sold SSTC ☐ Not advertised ☐ Previously matched

Sort: Current price (high to low) ▾

View: Table ▾



Showing 1 - 2 of 2

+ Create viewing

Send SMS

Preview email ▾

Send email

☐	Property address	Advertising status	Current price	Bedrooms	Prop Type	Prop Styles	Instructed date	Las
☐	8712 Pelaw Crescent, Chester le Street, County Durham, DH2 2HX	Available	OIRO £160,000	3	House	Semi-Detached	28/07/2026	28/
☐	74748 Pelaw Crescent, Chester le Street, County Durham, DH2 2HX	Available	Offers In Excess Of £154,000	3	House	Semi-Detached	16/07/2026	24/

Property missing from match results?

Check the criteria you've selected, that the property is marked to advertise, and the advertising status matches your selection.

8712 Pelaw Crescent, Chester le Street, County Durham, DH2 2HX

[View property record](#)



Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua. Ut enim ad minim veniam, quis nostrud exercitation ullamco laboris nisi ut aliquip ex ea commodo consequat. Duis aute irure dolor in reprehenderit in voluptate velit esse cillum dolore eu fugiat nulla pariatur. Excepteur sint occaecat cupidatat non proident, sunt in culpa qui officia deserunt mollit anim id est laborum. Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et

43 To send the property details, select the property records, or multiple if required.

Matching criteria:

Applicant: Sales' Applicant291 Location: Applicant's match areas Price: £130,000 - £170,000 Type: House
 Style: Semi-Detached Min bedrooms: 2 Min bathrooms: 1 Min receptions Rightmove type Clear criteria

Update results

Use default criteria

Include: ☐ Under offer ☐ Sold SSTC ☐ Not advertised ☐ Previously matched

Sort: Current price (high to low)

View: Table

Showing 1 - 2 of 2

+ Create viewing

Send SMS

Preview email

Send email

☐	Property address	Advertising status	Current price	Bedrooms	Prop Type	Prop Styles	Instructed date	Last viewed
☐	8712 Pelaw Crescent, Chester le Street, County Durham, DH2 2HX	Available	OIRO £160,000	3	House	Semi-Detached	28/07/2026	28/07/2026
☐	74748 Pelaw Crescent, Chester le Street, County Durham, DH2 2HX	Available	Offers In Excess Of £154,000	3	House	Semi-Detached	16/07/2026	24/07/2026

Property missing from match results?

Check the criteria you've selected, that the property is marked to advertise, and the advertising status matches your selection.

44 Click "Preview email" there is an option to send a tracked email from the drop down menu on this button.

property

My day Lettings Sales Accounts Reporting Communications

My account

Criteria:

Sales' Applicant291 Location: Applicant's match areas Price: £130,000 - £170,000 Type: House
 Semi-Detached Min bedrooms: 2 Min bathrooms: 1 Min receptions Rightmove type Clear criteria

Update results

Selected criteria

☐ Under offer ☐ Sold SSTC ☐ Not advertised ☐ Previously matched

Sort: Current price (high to low)

View: Table

Selected

+ Create viewing

Send SMS

Preview email

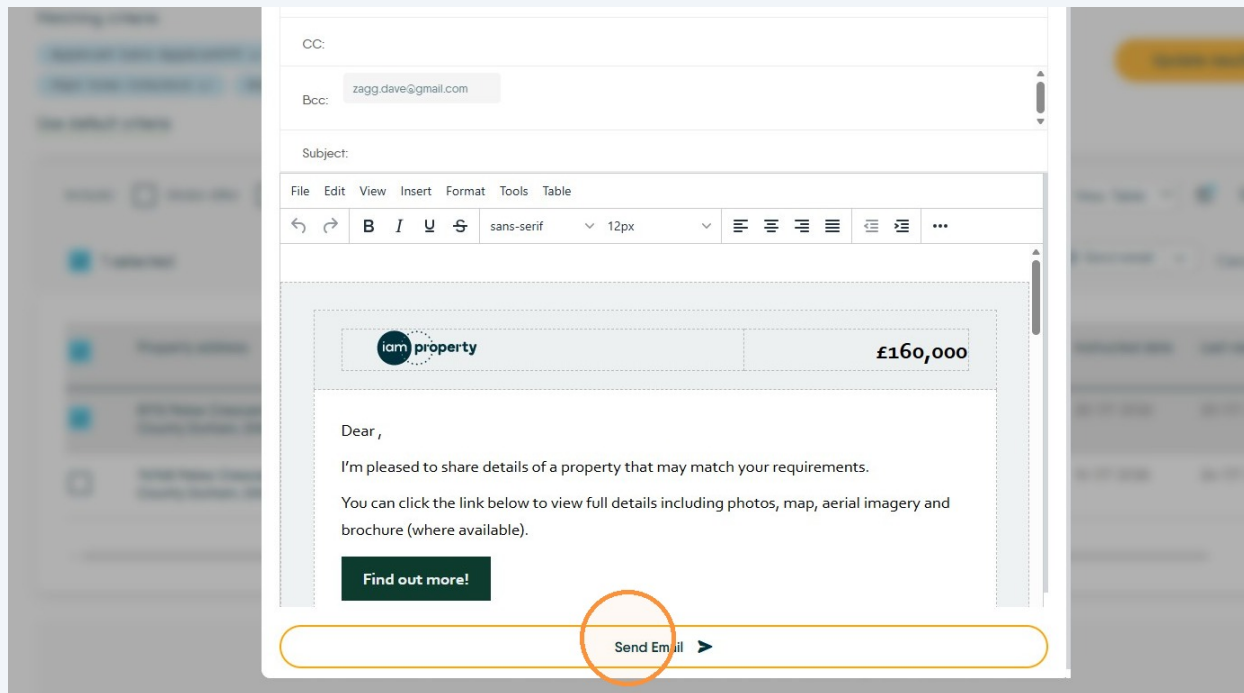
Send email

Cancel

Property address	Advertising status	Current price	Bedrooms	Prop Type	Prop Styles	Instructed date	Last viewed
8712 Pelaw Crescent, Chester le Street, County Durham, DH2 2HX	Available	OIRO £160,000	3	House	Semi-Detached	28/07/2026	28/07/2026
74748 Pelaw Crescent, Chester le Street, County Durham, DH2 2HX	Available	Offers In Excess Of £154,000	3	House	Semi-Detached	16/07/2026	24/07/2026

45

The email template that you have created will display on screen. Click **"Send Email"**



46

A confirmation message will show. Close the email queue confirmation.

