

Updating Property Details Screen



Once a Lettings property instruction has been won, the various CRM screens need to be completed to make a property record complete and able to upload to the online portals.

We will start off with the first screen the details screen.

1

Navigate to the property record for the property you have won the Lettings instruction for.

Live Jobs 0

EPC Rating C

Details

Checklist

Appraisals

Inspections

Accounts >

Compliance

Information

Maintenance >

Payment

Marketing

Key Control

View Sales Version

Appraisal

83891 Pelaw Crescent, Chester le Street, DH2 2HX |
3 1 | £ 0.00 null

Lead landlord: Mr & Mrs Sales Vend... View Landlords

Lead tenant: View Tenants

Reference: 10850866 Negotiator: Training Dave Branch: Morgan & Co Status: Prospect

PROPERTY PICTURES Upload

Property Address Edit Address

Postcode DH2 2HX

Property Information

Fully managed ☒
This property is fully managed by us

Rent collect ☐
We collect rent for this property

Let only ☐
We only let property

Appraisal Outcome

2

The first screen to complete is the **Appraisals** screen, this screen should contain all the information gained in the appraisal visit as well as pricing and fee amounts.

3 To update this screen and mark the appraisal as 'Won' or 'Lost'. Click **"Appraisals"**

The screenshot shows the app's main dashboard. On the left is a sidebar menu with the following items: 'Live Jobs' (0), 'EPC Rating' (C), 'Details' (home icon), 'Checklist' (checkmark icon), 'Appraisals' (house icon, circled in orange), 'Inspections' (list icon), 'Accounts' (calculator icon), 'Compliance' (shield icon), and 'Information' (info icon). The main content area has a dark blue header with the address '83891 Pelaw Crescent, Chester le Street, DH2 2HX |' and icons for 3 bedrooms and 1 bathroom, with a value of '£ 0.00 null'. Below the header are two sections: 'Lead landlord: Mr & Mrs Sales Vend...' with a 'View Landlords' button, and 'Lead tenant:' with a search icon. Further down are fields for 'Reference: 10850866', 'Negotiator: Training Dave' (with a dropdown arrow), and 'Branch'. A 'PROPERTY PICTURES' section features an 'Upload' button and a photo of a brick house. On the right, a 'Proper' section shows a 'Postcode: DH2:' field.

4 Check that the Valuation details have been completed, as well as any checklist you may have set.

The screenshot shows the 'Add Appraisal' screen. At the top left is an orange '+ Add Appraisal' button. Below it is a calendar icon with the date '21 Sep 2026' and time '16:57 - 17:42'. To the right of this are 'Delete' and 'Save' buttons. The main content is divided into three sections: 'Valuation Appointment', 'Valuation', and 'Checklist'. The 'Valuation Appointment' section includes a 'Valuers' field with 'Training Dave' and a close icon, an 'Appointment Booked' toggle (on), an 'Appointment Confirmed' toggle (on), and fields for 'Appointment Date' (21/09/2026 16:57) and 'Duration' (45 Mins). The 'Valuation' section has four input fields: 'Price From' (£ 1,400), 'Price To' (£ 1,600), 'Landlord' (£ 1,550), and 'Suggested' (£ 1,600). Below these is a 'Fee Amount' field set to '10.00%' with percentage and pound symbols. The 'Checklist' section is currently empty.

5

If you have **"Won"** the instruction scroll down and set this as the appraisal outcome status in the **'Outcome'** field. Add any notes.

If you have lost the instruction, mark the Appraisal as Lost and note the Agent the business was lost to, in the provided field and reason given by the Landlord.

The screenshot shows a web interface for an appraisal form. On the left is a sidebar with a list of items. The main content area has a header 'Comments/Notes' with two text input fields: 'Internal Notes' and 'Client Advice', each with formatting icons (B, I, U, and a grid icon). Below these is the 'Outcome' section, which is highlighted with an orange border. Inside 'Outcome', there is a 'Status' dropdown menu with 'Lost' and 'Won' options; 'Won' is selected and highlighted. To the right of the status dropdown is a 'Notes' text area with formatting icons. At the bottom of the form, there is a timestamp '21 Sep 2026 16:57 - 17:42' and two buttons: 'Delete' and 'Save'.

6

Click **"Save"**

This screenshot shows the same appraisal form as the previous one, but with the 'Outcome' section fully populated. The 'Status' dropdown is set to 'Won'. Below it, there is a 'Lost To Agent' dropdown menu. The 'Notes' text area is still present. The 'Save' button at the bottom right is now highlighted with an orange circle, indicating the next step is to click it. The timestamp and 'Delete' button remain the same.

Property Details

7

Click **"Details"** and complete this screen. The details screen is primarily the screen that shows the fees charged and the let type.

The screenshot displays the 'iamproperty' CRM interface. The top navigation bar includes 'My day', 'Lettings', 'Sales', 'Accounts', 'Reporting', and 'Communications'. The left sidebar contains a list of modules: 'Live Jobs', 'EPC Rating', 'Details' (highlighted with an orange circle), 'Checklist', 'Appraisals', 'Inspections', 'Accounts', 'Compliance', 'Information', and 'maintenance'. The main content area is titled 'Comments/Notes' and features two text input fields: 'Internal Notes' and 'Client Advice'. Below these, the 'Outcome' section includes a 'Status' dropdown menu (set to 'Won') and a 'Lost To Agent' dropdown menu. The 'Notes' section contains a text input field and a set of formatting icons (B, I, U, and a grid icon).

8

In the Status field select the "Live" option, or other option used by your agency e.g. pre let.

N.B. If Inactive or Archived options are selected then the property WILL NOT match against any applicant records.

The screenshot displays a property management software interface. At the top, there is a navigation bar with links for 'My day', 'Lettings', 'Sales', 'Accounts', 'Reporting', and 'Communications'. A 'My account' button is located on the right. Below the navigation bar, the property details for '83891 Pelaw Crescent, Chester le Street, DH2 2HX' are shown. The status is set to 'Live', which is highlighted by an orange box. Other fields include 'Reference: 10850866', 'Negotiator: Training Dave', and 'Branch: Morgan & Co'. The 'Status' dropdown menu is open, showing 'Live' as the selected option. Below the property details, there are sections for 'PROPERTY PICTURES' (with an 'Upload' button) and 'Property Address' (with an 'Edit Address' button). The 'Property Information' section is partially visible at the bottom.

Property Information

9

In the Property Information field select the **Let Type** by clicking onto the icons. Fully Managed and Rent Collect will create monthly rent invoice into the CRM Accounts module, Let Only will not create any rent charge.

Then set the **Management Fee** and **Upfront Letting Fee**. Select the type of charge, either £ value or percentage of the charged rent, by selecting the icon £ or % and typing the value into the appropriate field.

The **Regular Letting Fee** if set, is charged monthly alongside the Management Fee.

Property Information

Fully managed ✓
This property is fully managed by us

Rent collect
We collect rent for this property

Let only
We only let this property

Management Fee
£10.00 £ %

Upfront Letting Fee
£ 0 £ %

Regular Letting Fee
£ 0 £ %

Authorised Expense Amount
£ 0.00

Estimated Rental Value
£ 0.00

Agreement Name

COMMERCIAL

Commercial Unit

Exempt ✓
Rent amount is exempt from VAT

Inclusive
Rent amount is inclusive of VAT

Exclusive
Rent amount is exclusive of VAT

Scheduled Management Fee ⓘ

Amount
£ 0.00

Next Fee Date

10

The **"Authorised Expense Amount"** field is an information field showing how much can be spent on expenses before the Landlord is informed.

Estimated Rental Value allows a pre-appraisal estimate to be made if there are enquiries on the property before it is appraised and the instruction won.

The screenshot shows the 'Property Information' section of a form. On the left, there is a gallery of property images. Below the images, the 'COMMERCIAL' section has a 'Commercial Unit' toggle switch and three options: 'Exempt' (checked), 'Inclusive', and 'Exclusive'. The 'OTHER' section is partially visible at the bottom. On the right, the 'Property Information' section includes three radio buttons: 'Fully managed' (checked), 'Rent collect', and 'Let only'. Below these are fields for 'Management Fee' (£ 10.00), 'Upfront Letting Fee' (£ 500), and 'Regular Letting Fee' (£ 0). The 'Authorised Expense Amount' (£ 0.00) and 'Estimated Rental Value' (£ 0.00) fields are highlighted with an orange box. Below these is the 'Agreement Name' field with a 'Build Agreement Name' button. At the bottom, the 'Scheduled Management Fee' section shows 'Amount' (£ 0.00) and 'Next Fee Date'.

11

Click the **Build Agreement Name** button to automatically create an agreement name for the property, this can be edited or a name typed in, if required.

This screenshot is similar to the previous one, but the 'Authorised Expense Amount' is now £ 300.00. The 'Build Agreement Name' button is highlighted with an orange box. The 'Agreement Name' field is also highlighted with an orange box. The 'Scheduled Management Fee' section remains the same.

12

"Scheduled Management Fee" allows a fee to be charged at a set period of time e.g. weekly or quarterly etc, instead of or in addition to, a normal management fee.

The screenshot shows a software interface for property management. On the left, there are two main sections: 'COMMERCIAL' and 'OTHER'. The 'COMMERCIAL' section includes a 'Commercial Unit' field with a toggle switch, and three options: 'Exempt' (checked), 'Inclusive', and 'Exclusive'. The 'OTHER' section includes several toggle switches for 'Alarmed', 'Requires HMO Licence', 'Use Rent Guarantee', and 'Landlord Insurance', along with input fields for 'Entry Code', 'HMO Expiry Date', and 'Landlord Insurance Renewal Date'. On the right, there is a 'Scheduled Management Fee' section highlighted with an orange box. This section contains fields for 'Amount' (£ 0.00), 'Next Fee Date', 'Charge Frequency' (a dropdown menu), and 'Charge When Vacant' (a toggle switch). Above this section, there are fields for 'Regular Letting Fee' (£ 0), 'Authorised Expense Amount' (£ 300.00), 'Estimated Rental Value' (£ 0.00), and 'Agreement Name' (Sales Vendor261).

This screenshot provides a closer look at the 'Scheduled Management Fee' section. A dark blue callout box with white text explains: 'The scheduled management fee charges a fixed amount on a specified schedule. This fee is charged in addition to the management fee entered in the property information panel.' The background shows the same software interface as the previous screenshot, but with the 'Scheduled Management Fee' section expanded. It includes fields for 'Amount' (£ 0.00) and 'Next Fee Date'. Above this, there are fields for 'Regular Letting Fee' (£ 0), 'Authorised Expense Amount' (£ 300.00), 'Estimated Rental Value' (£ 0.00), and 'Agreement Name' (Sales Vendor261).



If this fee is charged as well as a management fee a warning will show on screen.

13 In the **"Other"** there are options for;

"Alarmed" where an alarm code can be added (this is shown in a viewing appointment)

"HMO" If a property is an HMO this can be noted and Licence Expiry dates recorded

"Rent Guarantee" if available and taken this can be enabled in CRM accounts and the expiry date set.

"Landlord Insurance" if taken and its expiry date.

The screenshot displays a software interface for property management. On the left, a sidebar contains navigation icons. The main content area is divided into two sections: 'COMMERCIAL' and 'OTHER'. The 'OTHER' section is highlighted with an orange border and contains several toggle switches and input fields. The 'COMMERCIAL' section includes a 'Commercial Unit' toggle and three options: 'Exempt' (checked), 'Inclusive', and 'Exclusive'. To the right of these sections are input fields for 'Regular Letting Fee', 'Authorised Expense Amount', 'Estimated Rental Value', and 'Agreement Name'. Below these is a 'Scheduled Management Fee' section with fields for 'Amount', 'Next Fee Date', 'Charge Frequency', and a 'Charge When Vacant' toggle. At the bottom right, there is a yellow circular button with a document icon.

Section	Field/Option	Value/Status
COMMERCIAL	Commercial Unit	Off
	Exempt	Checked
	Inclusive	Unchecked
	Exclusive	Unchecked
OTHER	Alarmed	Off
	Entry Code	56465465534
	Requires HMO Licence	Off
	HMO Expiry Date	
	Use Rent Guarantee	Off
	Landlord Insurance	Off
	Landlord Insurance Renewal Date	
	Regular Letting Fee	£ 0
Authorised Expense Amount	£ 300.00	
Estimated Rental Value	£ 0.00	
Agreement Name	Sales Vendor261	
Scheduled Management Fee	Amount	£ 0.00
	Next Fee Date	
	Charge Frequency	
	Charge When Vacant	Off