

New CRM Lettings Property Header and Overview Page



This guide showcases the features of the new CRM Overview screens. The Overview screens consist of 2 parts; - A new details screen and milestones indication - A new 'Overview' screen. Giving quick and easy access to key items that are used during the preparation and rental of a lettings property. Through this guide we will look at each section individually and explain its use and benefits.



Alert! Although there is an **Offer** feature in the Overview screen we will not cover that due to regulations restricting taking offers on Rental properties. It is left in for clients that do use the feature for other reasons.

Milestones and Page Header

1

The Milestones are the numbered dots at the top of the page header, these will update as the property progresses through the Letting process, illuminating either amber or green. Certain icons will show as amber until complete e.g. Appraisal, once an Appraisal is booked and until the booked date is passed will show amber, once the date is passed the marker turns green.

Hovering the mouse over a milestone will show the date related to that milestone.

There is also the option to Match Applicants, Add journal entry, Create viewing and Add a warning.

My dayLettingsSalesAccountsReportingCommunications

My account

1Pre-appraisal

2Appraisal

3Instruction

4To let

5Let

No media

Add media

Property

Not Available

87877 Pelaw Crescent, Chester le Street, County Durham, DH22HX

311

No rent set

Landlord(s)

View/edit all

lettings landlord252

zagg.davee@gmail.com

07855222222

Tenant(s)

No tenants

Match to applicants

Add journal entry

Create viewing

Add warning

Reference:

Negotiator: Training Dave

Branch Morgan & Co

Status Prospect

Recent activity

Checklist

Appraisal

Compliance

Property Owner

08/10/2026

Training Dave • Old value: lettings landlord252: False • New value: lettings landlord252: True

Fri 09 Oct 2026 at 13:55

Training Dave, Brooke Morgan • Won

Add appraisal

Add instruction date

EPC Graph

Upload/generate

My dayLettingsSalesAccountsReportingCommunications

My account

1Pre-appraisal

2Appraisal

3Instruction

4To let

5Let

No media

Add media

Property

Not Available

87877 Pelaw Crescent, Chester le Street, County Durham, DH22HX

311

No rent set

Landlord(s)

View/edit all

lettings landlord252

zagg.davee@gmail.com

07855222222

Tenant(s)

No tenants

Match to applicants

Add journal entry

Create viewing

Add warning

Reference:

Negotiator: Training Dave

Branch Morgan & Co

Status Prospect

Recent activity

Checklist

Appraisal

Compliance

Property Owner

08/10/2026

Training Dave • Old value: lettings landlord252: False • New value: lettings landlord252: True

Fri 09 Oct 2026 at 13:55

Training Dave, Brooke Morgan • Won

Add appraisal

Add instruction date

EPC Graph

Upload/generate

My day

Lettings

Sales

Accounts

Reporting

Communications

My account

1

2

3

4

5

Pre-appraisal

Appraisal

Instruction

To let

Let

12

Property

Available

Appraisal: 09/10/2026 at 13:55

87877 Pelaw Crescent, Chester le Street, County Durham, DH2 2HX

3

1

1

£1,000 monthly

Landlord(s)

View/edit all

lettings landlord252

zagg.davee@gmail.com

07855222222

+ 1 more

Tenant(s)

No tenants

Match to applicants

Add journal entry

Create viewing

Add warning

Reference:

Negotiator: Training Dave

Branch: Morgan & Co

Status: Prospect

Recent activity

Checklist

Lease Period

Training Dave • Old value: Blank • New value: Monthly

47 minutes ago

Rent

Training Dave • Old value: 0.00 • New value: 1000.00

47 minutes ago

Portals

Remove from all

Upload to all

Rightmove

Upload

Zoopla

Upload

OnTheMarket

Upload

My day

Lettings

Sales

Accounts

Reporting

Communications

My account

1

2

3

4

5

Pre-appraisal

Appraisal

Instruction

To let

Let

No media

Add media

Property

Not Available

Appraisal: 09/10/2026 at 13:55

87877 Pelaw Crescent, Chester le Street, County Durham, DH22HX

3

1

1

No rent set

Landlord(s)

View/edit all

lettings landlord252

zagg.davee@gmail.com

07855222222

+ 1 more

Tenant(s)

No tenants

Match to applicants

Add journal entry

Create viewing

Add warning

Reference:

Negotiator: Training Dave

Branch: Morgan & Co

Status: Prospect

Recent activity

Checklist

Property Owner

Training Dave • Old value: lettings landlord252: False • New value: lettings landlord252: True

08/10/2026

Appraisal

Add appraisal

Fri 09 Oct 2026 at 13:55

Training Dave, Brooke Morgan • Won

Add instruction date

Compliance

2

The left side of the header shows the property detail and has the options to add the property images, set the advertising status and sent the rental amount.

The screenshot displays the 'property' app interface. At the top, there's a navigation bar with 'My day', 'Lettings', 'Sales', 'Accounts', 'Reporting', and 'Communications'. A search icon and 'My account' button are on the right. Below this is a progress bar with five stages: 1. Pre-appraisal, 2. Appraisal, 3. Instruction, 4. To let, and 5. Let. The main content area is divided into two columns. The left column, under 'Pre-appraisal', shows 'Property' details: '87877 Pelaw Crescent, Chester le Street, County Durham, DH22HX', 'Not Available' status, and an 'Add media' button. The right column, under 'Appraisal', shows 'Landlord(s)' details: 'lettings landlord252', 'zaggs.davee@gmail.com', and '0785522222'. Below these are buttons for 'Match to applicants', 'Add journal entry', 'Create viewing', and 'Add warning'. At the bottom, there are filters for 'Reference', 'Negotiator' (Training Dave), 'Branch' (Morgan & Co), and 'Status' (Prospect). The bottom section includes 'Recent activity', 'Checklist', 'Appraisal' (Fri 09 Oct 2026 at 13:55), and 'Compliance'.

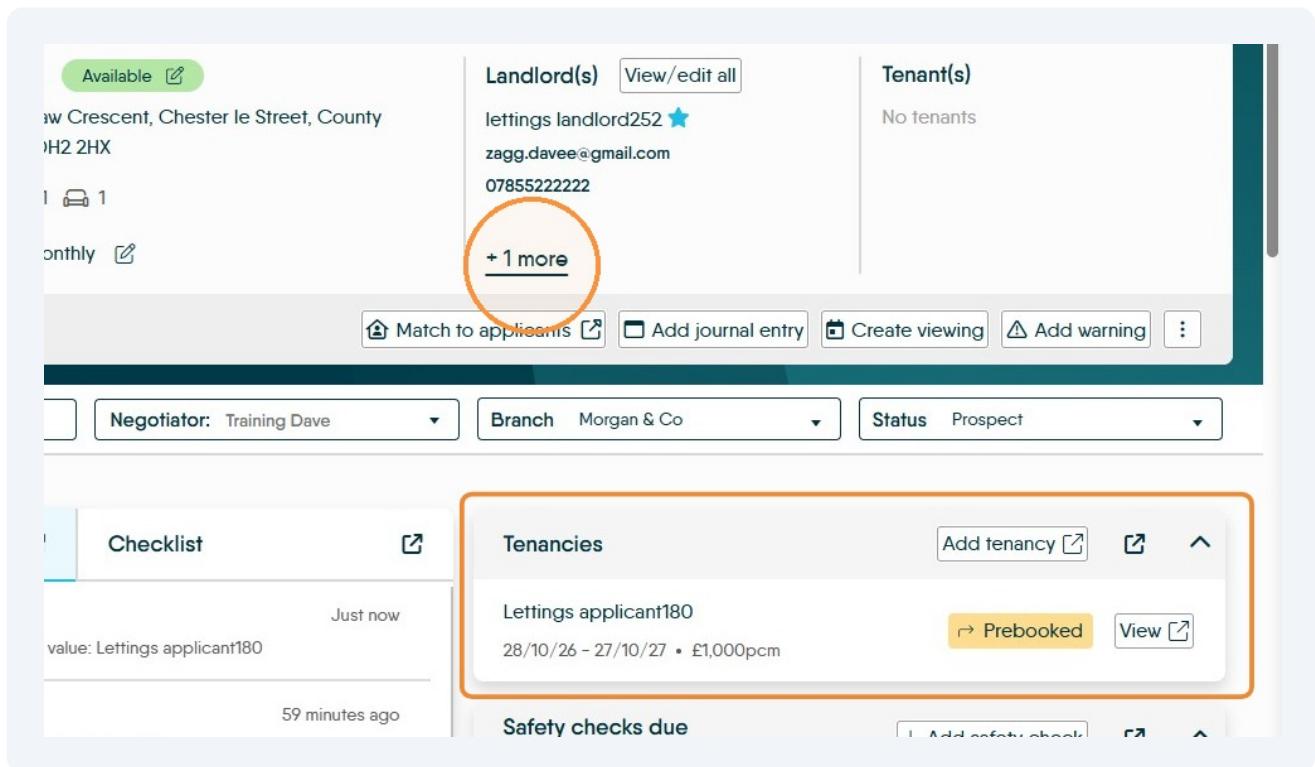
3

The right side of the screen shows the detail for the Landlord and the Tenant.

If there is more than 1 Landlord this will show as (in this case) '+1 more'.

Details for a 'Live' tenancy will show in the Tenants section. If there is a prebooked tenant their detail will show just below in the Tenancies tab.

This screenshot is identical to the one above, showing the 'property' app interface in the 'Pre-appraisal' stage. It highlights the 'Landlord(s)' and 'Tenant(s)' sections, which are outlined with an orange box. The 'Landlord(s)' section shows 'lettings landlord252', 'zaggs.davee@gmail.com', and '0785522222'. The 'Tenant(s)' section shows 'No tenants'. The interface includes a navigation bar, a progress bar, and various filters and activity sections at the bottom.

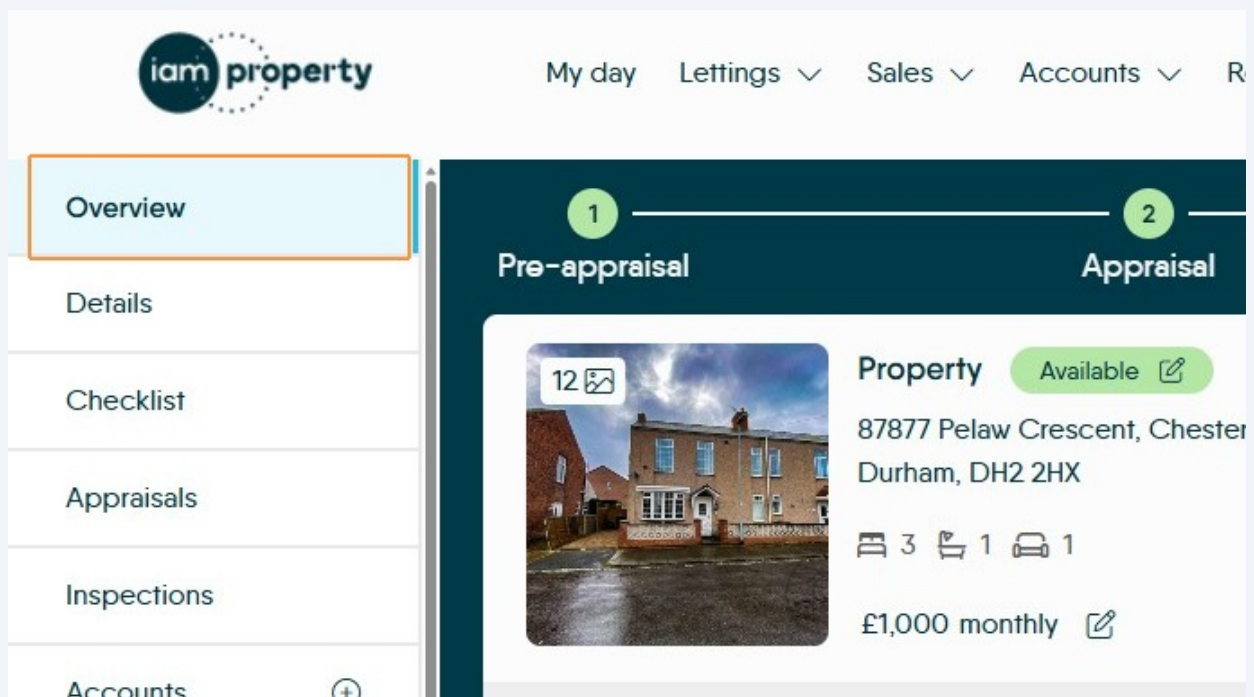


Overview Screen

4

This is the first screen you will see when accessing a property record, it can be accessed using the '**Overview**' menu option in the left menu.

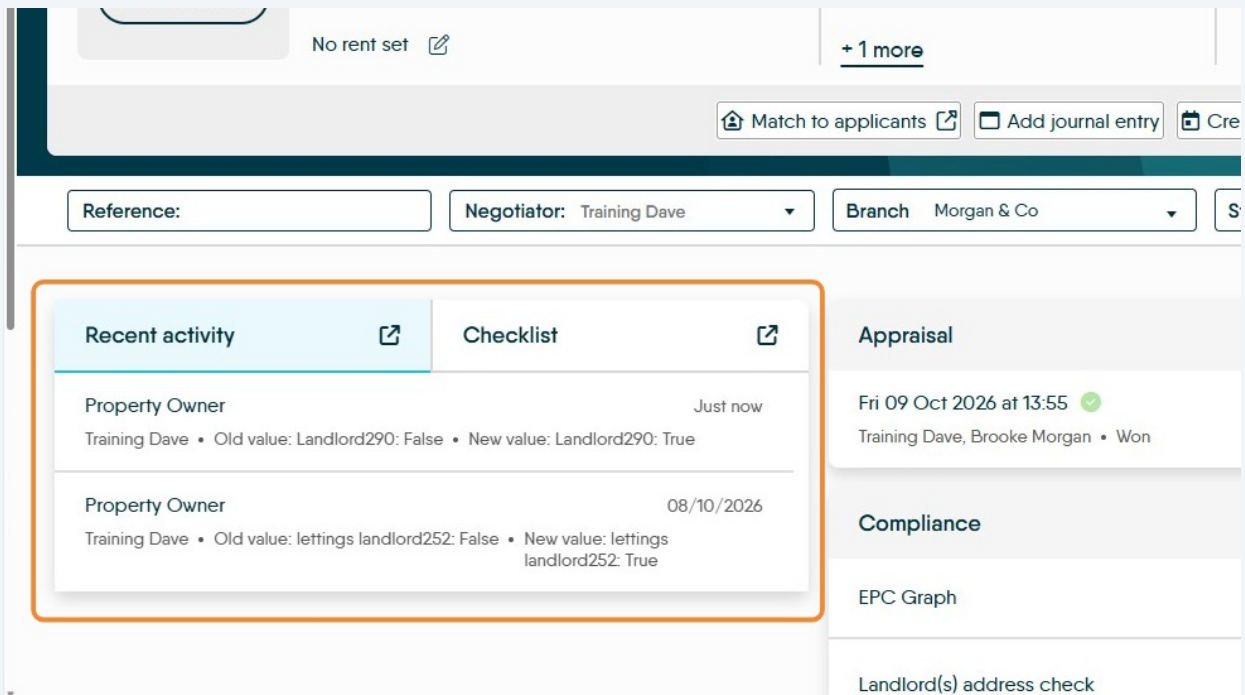
The Overview screen is dynamic, the order of the screen will change as items are updated and increase in priority.



5

On the left side there are 2 options, **Recent activity** and **Checklist**

Recent Activity shows all the changes and updates that have happened to this record in CRM. Showing the change, who made the change and what the change was. (This is the current CRM Audit screen)



The screenshot shows the CRM Audit screen. At the top, there are filters for 'Reference:', 'Negotiator: Training Dave', and 'Branch: Morgan & Co'. Below these, there are two tabs: 'Recent activity' (selected) and 'Checklist'. The 'Recent activity' tab shows a list of changes:

Property Owner	Just now
Training Dave • Old value: Landlord290: False • New value: Landlord290: True	
Property Owner	08/10/2026
Training Dave • Old value: lettings landlord252: False • New value: lettings landlord252: True	

On the right side, there are sections for 'Appraisal' (Fri 09 Oct 2026 at 13:55, Training Dave, Brooke Morgan • Won) and 'Compliance' (EPC Graph, Landlord(s) address check).

6

The '**Checklist**' screen will show any Property checklists that you have created and the process through those checklists.

Clicking the down arrow will show you the current Checklists and the completion status, clicking onto the checklist name will open the checklist for review and updating.

8

Appraisal. This will allow you to add an appraisal if one isn't already created via the 'Add appraisal' option. Click **Add instruction date** to add the date you were instructed on the property.

Select the instructed date from the calendar.

Match to applicants
Add journal entry
Create viewing
Add warning

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

Checklist
55%
0%
0%

Appraisal
Add appraisal
Fri 09 Oct 2026 at 13:55
Training Dave, Brooke Morgan • Won
Add instruction date

Compliance

Prepare for listing

Safety checks due
In next 60 days
Add safety check

COMMERCIAL
Commercial Unit
Exempt
Inclusive
Exclusive

OTHER
Alarmed
Requires HMO Licence
Use Rent Guarantee
Entry Code
HMO Expiry Date

Management Fee
Upfront Letting Fee
Regular Letting Fee
Authorised Expense Amount
Estimated Rental Value
Agreement Name
Instructed date
Add Document
Date Property Withdrawn
Next Fee Date
Charge Frequency
Charge When Vacant

October 2026
27 28 29 30 1 2 3
4 5 6 7 8 9 10
11 12 13 14 15 16 17
18 19 20 21 22 23 24
25 26 27 28 29 30 31
1 2 3 4 5 6 7

9

The **Instruction** indicator will now be green.

The screenshot displays the 'property' management interface. At the top, a navigation bar includes 'My day', 'Lettings', 'Sales', 'Accounts', 'Reporting', and 'Communications'. A user profile 'My account' is in the top right. Below the navigation bar, a progress bar shows five steps: 1. Pre-appraisal, 2. Appraisal, 3. Instruction (highlighted with a green circle), 4. To let, and 5. Let.

The main content area is divided into sections:

- Property:** Not Available (with a checkmark icon). Address: 87877 Pelaw Crescent, Chester le Street, County Durham, DH2 2HX. Icons for 3 bedrooms, 1 bathroom, and 1 car. 'No rent set' with an edit icon. An 'Add media' button is present.
- Landlord(s):** View/edit all. Contact: lettings landlord252 (with a star icon), zaggy.davee@gmail.com, 0785522222. A '+ 1 more' link is at the bottom.
- Tenant(s):** No tenants.

Below these sections are action buttons: Match to applicants, Add journal entry, Create viewing, Add warning, and a menu icon.

Below the action buttons are filters: Reference: (empty), Negotiator: Training Dave (dropdown), Branch: Morgan & Co (dropdown), and Status: Prospect (dropdown).

At the bottom, there are three panels:

- Recent activity:** A table with three rows: 'Lettings Property Setup' (55%), 'Quarterly Check IN' (0%), and 'Safety Checks' (0%).
- Checklist:** A panel with a blue header and a checklist item 'Lettings Property Setup' with a progress bar at 55%.
- Compliance:** A panel with a blue header and a checklist item 'EPC Graph' with a progress bar at 0% and an 'Upload/generate' button.

Compliance Checks

10

The next step is "**Compliance**".

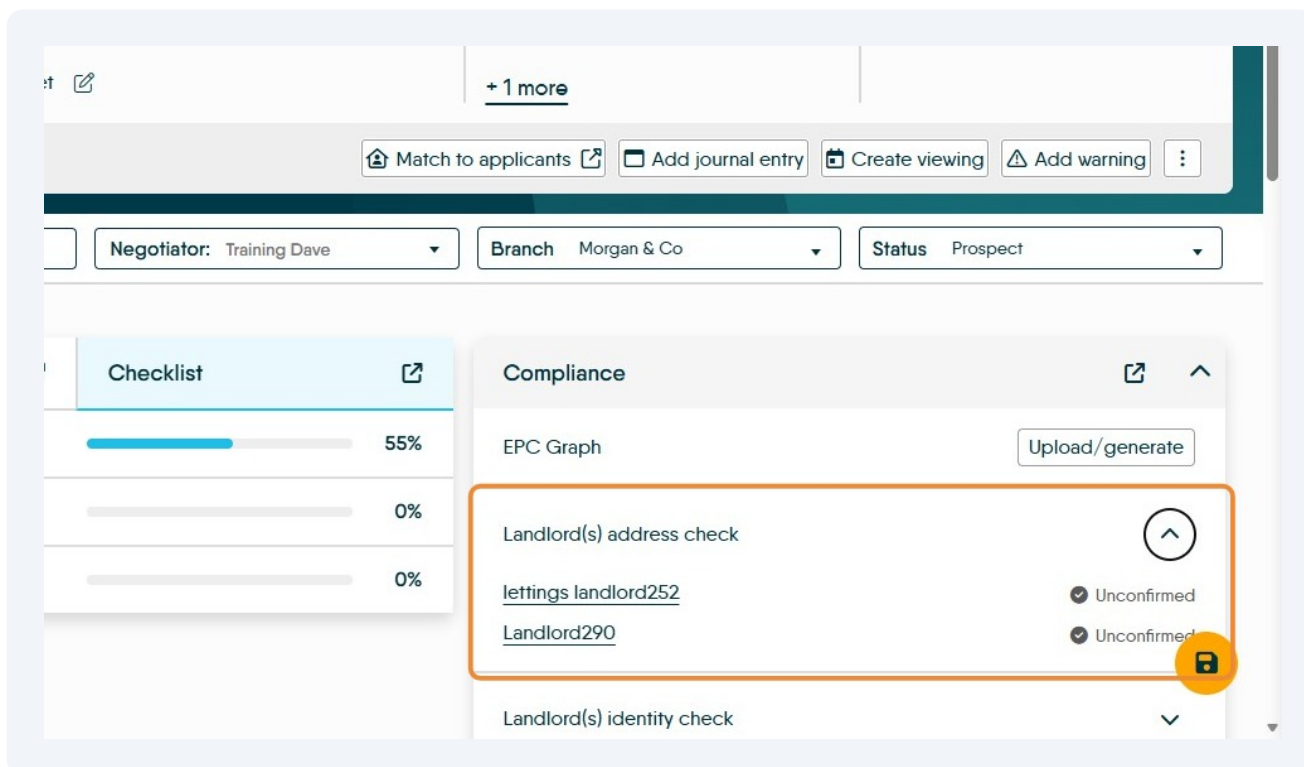
Expanding the Compliance section allows the EPC graph to be generated easily. Click '**Upload/generate**' to access the screen to add the EPC.

The screenshot displays the Property Management System interface. At the top, there are five tabs: 1 Pre-appraisal, 2 Appraisal, 3 Instruction, 4 To let, and 5 Let. The 'Appraisal' tab is selected. Below the tabs, there are sections for Property, Landlord(s), and Tenant(s). The Property section shows '87877 Pelaw Crescent, Chester le Street, County Durham, DH2 2HX' and 'No rent set'. The Landlord(s) section shows 'lettings landlord252' and 'zaggs.davee@gmail.com'. The Tenant(s) section shows 'No tenants'. Below these sections, there are buttons for 'Match to applicants', 'Add journal entry', 'Create viewing', and 'Add warning'. A 'Reference:' field is also present. Below the buttons, there are dropdown menus for 'Negotiator: Training Dave', 'Branch: Morgan & Co', and 'Status: Prospect'. On the left, there is a 'Recent activity' section with a table showing 'Lettings Property Setup' at 55%, 'Quarterly Check IN' at 0%, and 'Safety Checks' at 0%. On the right, the 'Compliance' section is expanded, showing 'EPC Graph' with an 'Upload/generate' button, 'Landlord(s) address check', 'Landlord(s) identity check', and 'Prepare for listing'.

11

Expand **Landlord(s) address check**. This will show whether the address check has been done on your landlord.

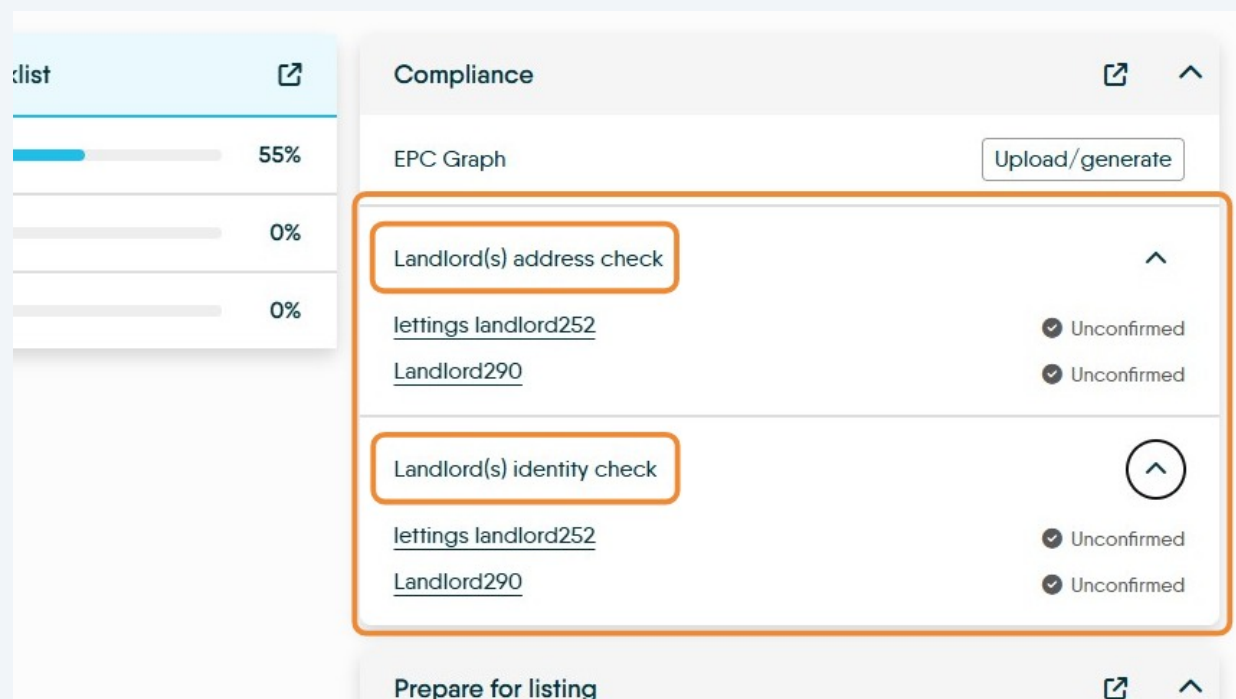
The screenshot displays the Property Management System interface, focusing on the 'Compliance' section. The 'Compliance' section is expanded, showing 'EPC Graph' with an 'Upload/generate' button, 'Landlord(s) address check', 'Landlord(s) identity check', and 'Prepare for listing'. The 'Landlord(s) address check' is highlighted with a red circle, indicating it is the next step to be expanded. The 'Landlord(s) identity check' is also visible below it. The 'Prepare for listing' button is at the bottom of the section. The background shows the same interface as the previous screenshot, with the 'Appraisal' tab selected and the 'Reference:' field set to 'Training Dave'.

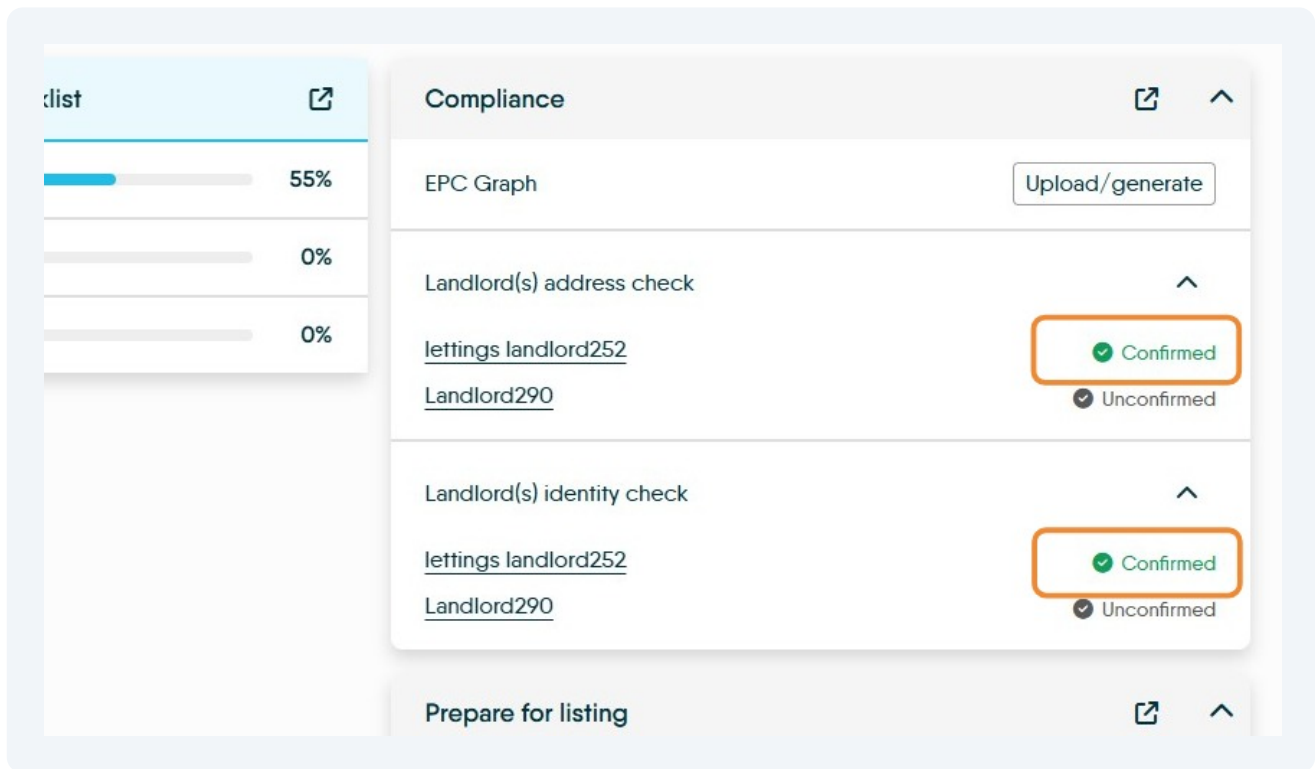


12

Click the **landlord name** in the address-check list. This will take you to the Landlord record where you can upload the appropriate documents into the documents folder. If you add both address and identity proof documents at the same time both address check and identity check sections will be completed.

Once done Confirmed will show instead of Unconfirmed
Confirm the selected landlord's address and identity checks.





Prepare for Listing

13

This step allows all of the data to be added to be able to make a property live on the portals. In this section we will show where each option moves to and what can be done.

14 Expand **Prepare for listing**.

The screenshot shows a property listing management interface. On the left is a 'Checklist' panel with a table of items. The main area on the right is titled 'Prepare for listing' and is highlighted with an orange border. Below this is a 'Safety checks due' section. The 'Prepare for listing' section contains four buttons: 'Set to let', 'Marketing', 'Media', and 'Rooms', each with a right-pointing arrow. The 'Safety checks due' section shows a shield icon and the text 'No Safety Checks Due in next 60 days'.

Item	Status	Time
value: epc-graph-10856163.png		Just now
value: 28/10/2026 00:00		8 minutes ago
Checked	Yes	10 minutes ago
Checked	Yes	10 minutes ago
Checked	Yes	10 minutes ago
Checked	Yes	10 minutes ago

Prepare for listing

- Set to let
- Marketing
- Media
- Rooms

Safety checks due
In next 60 days

+ Add safety check

No Safety Checks Due in next 60 days

15 Click **Set to let**.
Open the **Advertising status** dropdown and select the appropriate option.

This screenshot is identical to the previous one, but the 'Set to let' button in the 'Prepare for listing' section is highlighted with a blue border, indicating it is the next step in the process.

Item	Status	Time
0856163.png		Just now
00:00		8 minutes ago
		10 minutes ago
		10 minutes ago
		10 minutes ago
		10 minutes ago

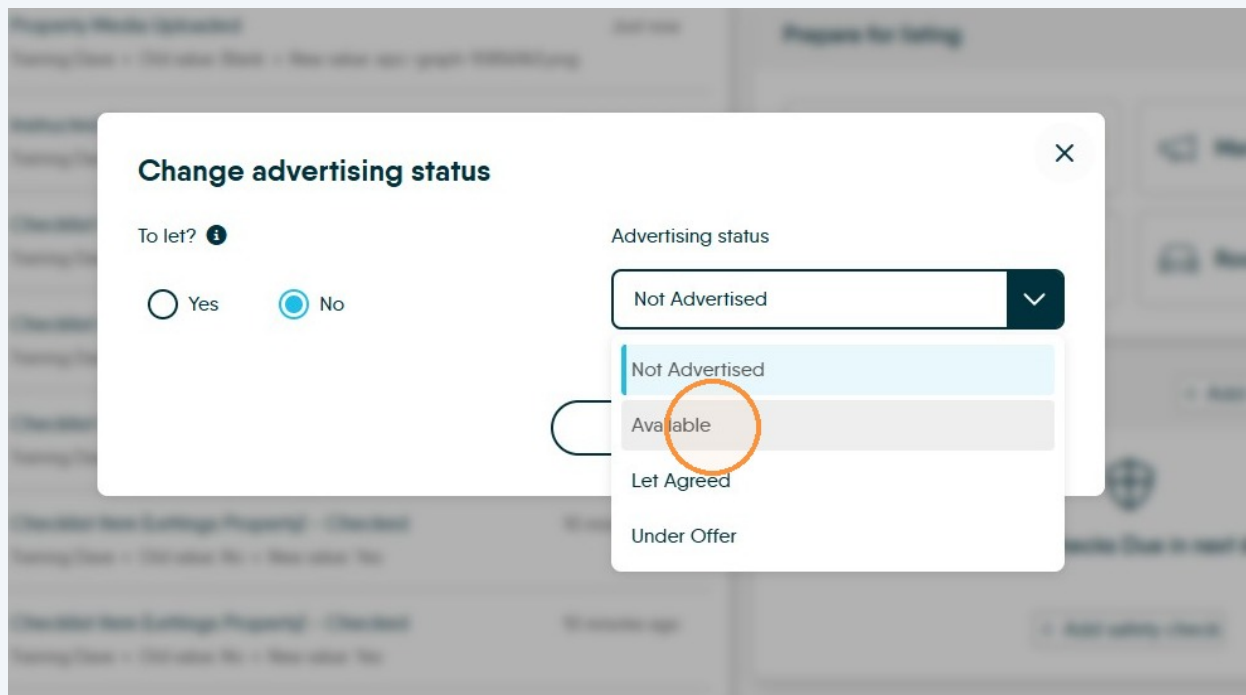
Prepare for listing

- Set to let
- Marketing
- Media
- Rooms

Safety checks due
In next 60 days

+ Add safety check

No Safety Checks Due in next 60 days

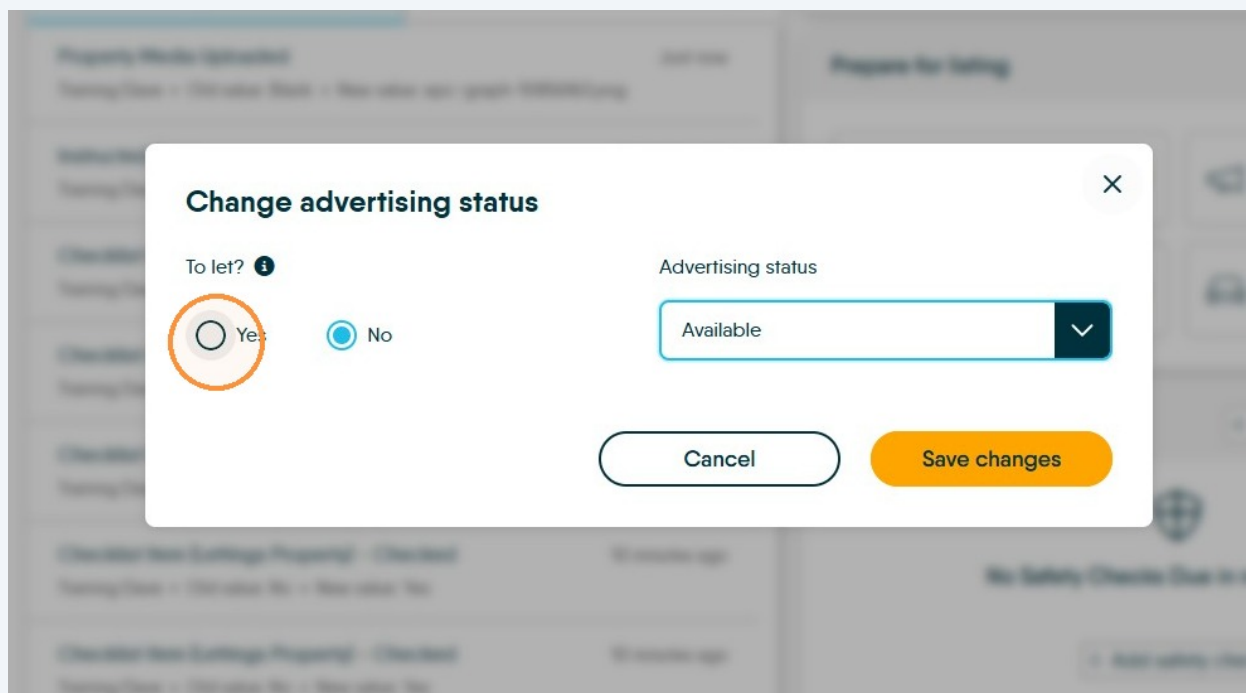


16

If you want to make the property available to let, select Yes for To let and choose Available as the advertising status.

n.b. Only do this if at this point you are ready to upload properties to the online portals.

Click Save changes.



Change advertising status ×

To let? ⓘ

☒ Yes ☐ No

☐ Upload/remove from portals ⓘ

Advertising status

Available ▼

Cancel Save changes

Change advertising status ×

To let? ⓘ

☐ Yes ☒ No

Advertising status

Available ▼

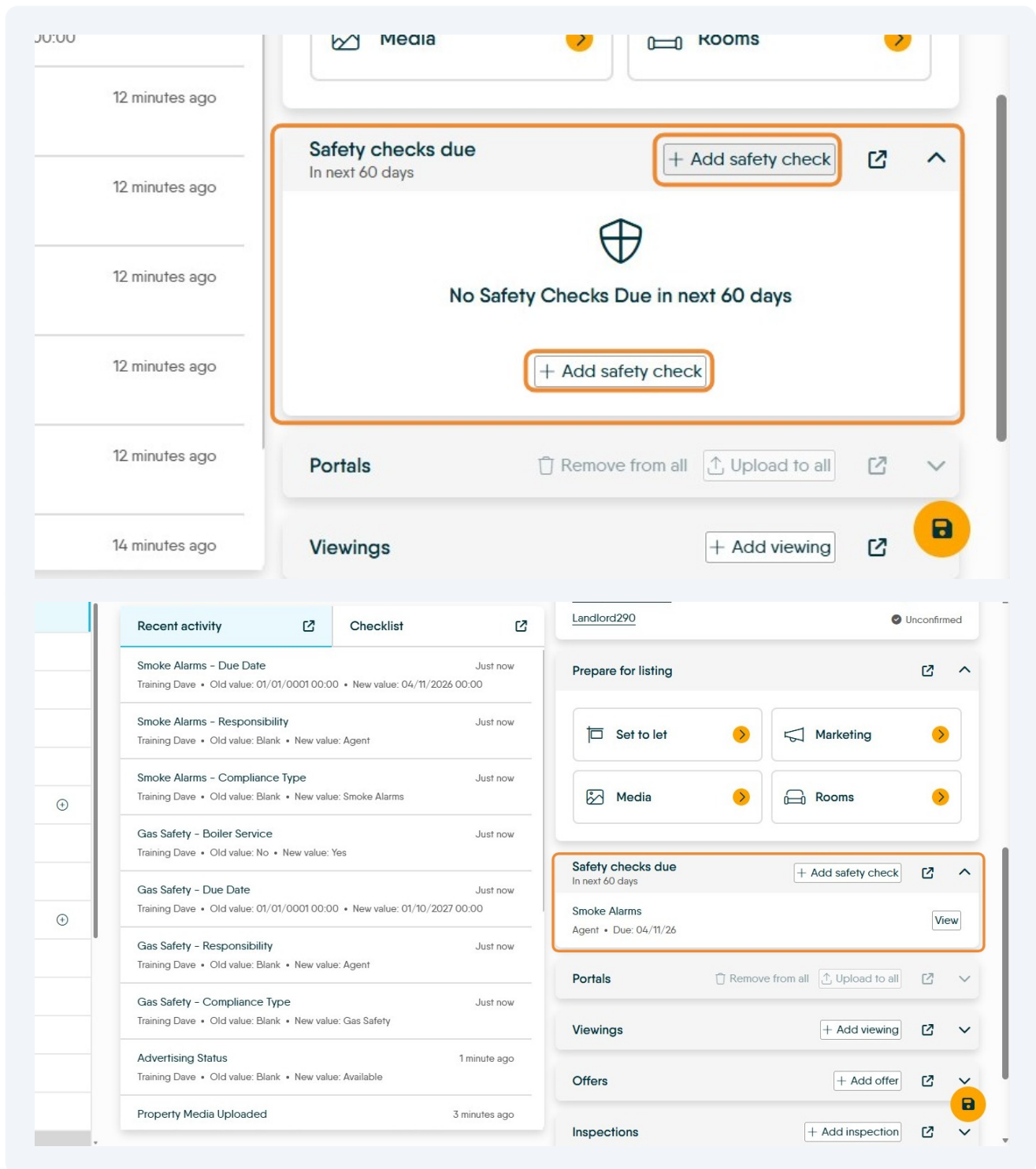
Cancel Save changes

Safety Checks Due

17

Any safety checks that are set for the property will show in here if they are due within the next 60 days.

To add a new safety check, click **Add safety check**. Set the new safety check as you would normally. The new check will show in the Safety checks due screen when due.



Portals

18

If you are uploading the property to the online portals click the arrow to expand the Portals screen. Select the portals as required.

The screenshot shows the 'Pre-appraisal' stage of a property listing in the iamproperty CRM. The main content area displays property details, including the address '87877 Pelaw Crescent, Chester le Street, County Durham, DH2 2HX', the status 'Available', and the landlord 'lettings landlord252'. Below this, there are sections for 'Recent activity' and 'Checklist'. The 'Portals' section is highlighted with an orange border, showing a list of portals: Rightmove, Zoopla, and OnTheMarket. Each portal has an 'Upload to all' button and a 'Remove from all' button.

Viewing

19

Any Viewings added to CRM either by the best practice route linked below or from this screen will show here for easy quick visibility. [Core Process Simplification - Adding a New Lettings Viewing Appointment – iamproperty](#)

Once a viewing is added it is tracked in this screen, the screen will show how many upcoming appointments there are and how many require feedback, there is also an add feedback option next to the appropriate viewings.

20

Click **Add viewing** to add a new viewing for the property

Existing or viewings added by different route will also show here.

Match to applicants

Add journal entry

Create viewing

Add warning

Training Dave

Branch

Morgan & Co

Status

Prospect

Just now

Just now

04/11/2026 00:00

Just now

Portals

Remove from all

Upload to all

Viewings

+ Add viewing

No viewings

+ Add viewing

OnTheMarket

Viewings

+ Add viewing

Upcoming (0)

Requiring feedback (2)

All (2)

Wed 28 Oct 2026 at 21:44

lettings applicant133a

Add feedback

Wed 28 Oct 2026 at 21:43

Lettings Applicant188 • 0781215654654

Add feedback

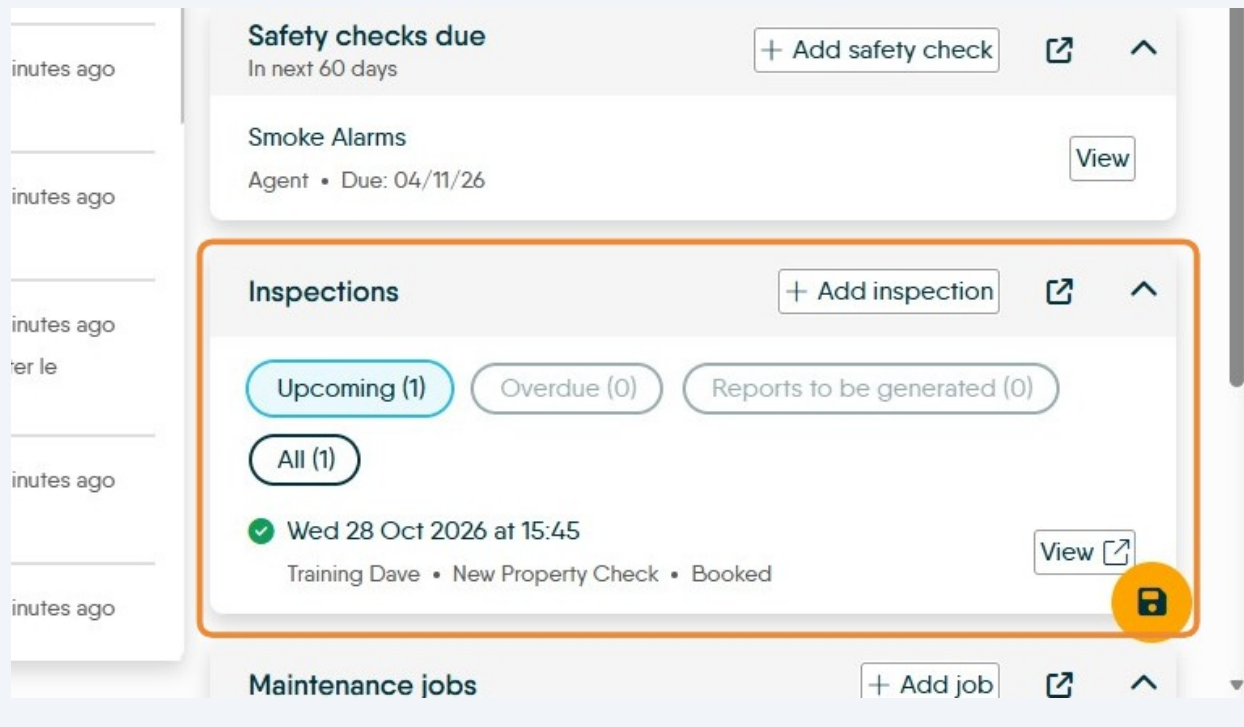
Offers

+ Add offer

Inspections

21

Inspections. This screen allows previously set inspections to be viewed and managed, also allows new Inspections to be added. Inspections booked are linked to the Inspections module allowing easy access to complete and create reports.



Maintenance Jobs



Tip! It is best practice to create maintenance tasks in the Property Management module as there is more functionality than using this route.

22

Maintenance jobs.

This section allows new maintenance jobs to be created and allocated to Contractors and allows you to view the maintenance jobs list for this property.

Clicking the '**View**' option will open the Property Management module to allow jobs to be managed efficiently.

minutes ago
ter le

minutes ago

minutes ago

minutes ago
ter le

minutes ago

Wed 28 Oct 2026 at 15:45
Training Dave • New Property Check • Booked

View

Maintenance jobs

+ Add job

↗

^

Live (1)

Completed (0)

All (1)

Bannister

28/10/26, 21:48 • Training Dave

Stair bannister needs repair

Live

View

Appraisal

Add appraisal

↗

▼

Compliance

↗

▼

minutes ago
ter le

minutes ago

minutes ago

minutes ago
ter le

minutes ago

Maintenance jobs

+ Add job

↗

^

Live (2)

Completed (0)

All (2)

Electrical Fault

28/10/26, 21:49 • Training Dave

Faulty fuse board

Live

View

Bannister

28/10/26, 21:48 • Training Dave

Stair bannister needs repair

Live

View

Appraisal

Add appraisal

↗

▼