

# Changing Landlord Information/Ownership In CRM

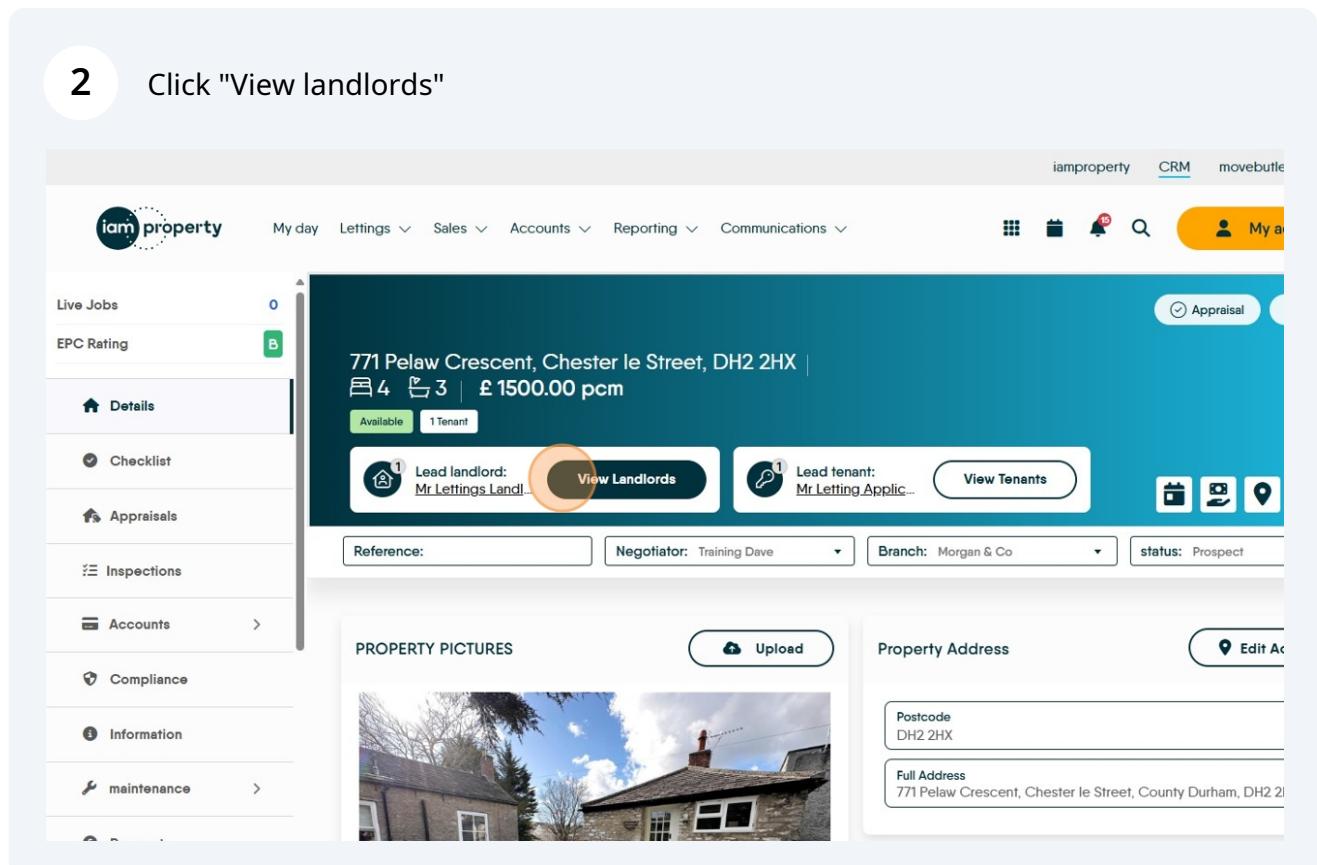
This guide provides a straightforward process for updating landlord information in the CRM system, ensuring that property records are accurate and current.

By following the steps outlined, users can efficiently change ownership details, which is essential for maintaining effective property management. Viewing this guide will save time and reduce errors in the CRM, making it a valuable resource for property management professionals.

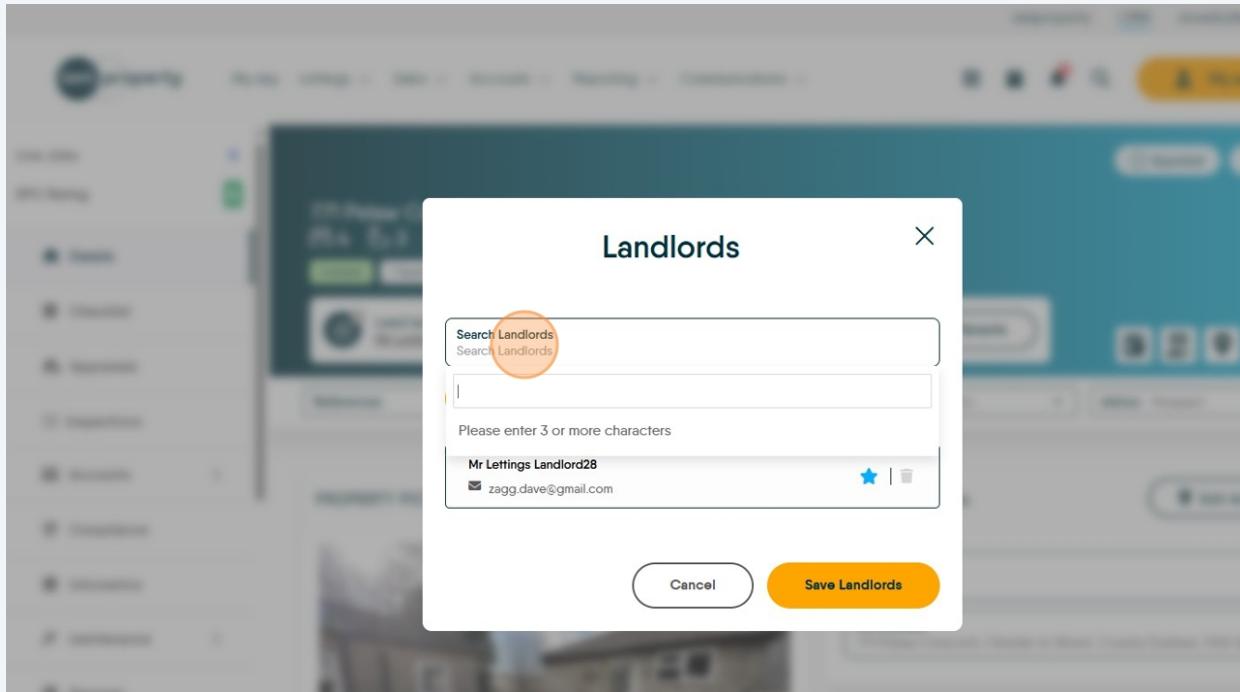
- 1 Navigate to <https://crm.iamproperty.com/myday> then navigate to the property where you are changing the landlord details.

## To Change Landlord/Ownership

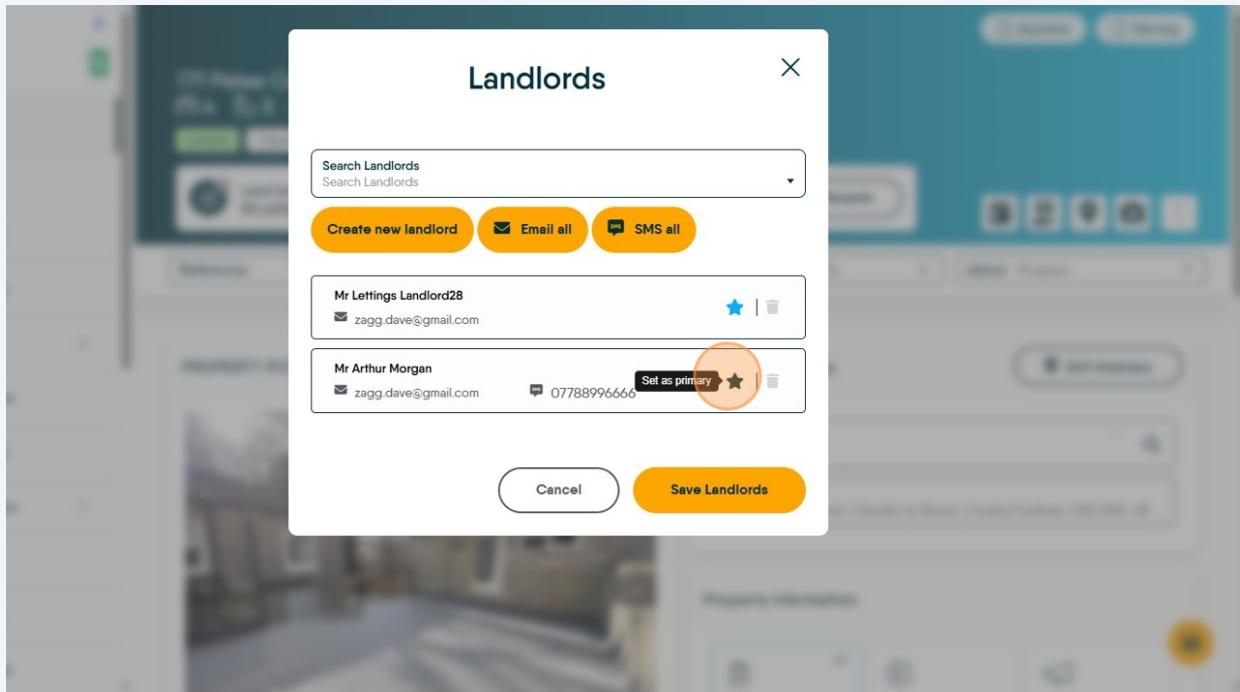
- 2 Click "View landlords"

A screenshot of the iam property CRM software. The top navigation bar includes links for 'My day', 'Lettings', 'Sales', 'Accounts', 'Reporting', 'Communications', and user-specific icons. The main content area displays a property listing for '771 Pelaw Crescent, Chester le Street, DH2 2HX'. The listing shows '4 Bed 3 Bath | £1500.00 pcm'. Below the address, there are buttons for 'View Landlords' (which is highlighted with a red circle), 'View Tenants', and 'Appraisal'. To the left of the main content is a sidebar with links for 'Live Jobs', 'EPC Rating', 'Details', 'Checklist', 'Appraisals', 'Inspections', 'Accounts', 'Compliance', 'Information', and 'Maintenance'. At the bottom of the page, there are sections for 'PROPERTY PICTURES' (with a thumbnail image of a house) and 'Property Address' (with fields for 'Postcode' (DH2 2HX) and 'Full Address' (771 Pelaw Crescent, Chester le Street, County Durham, DH2 2)).

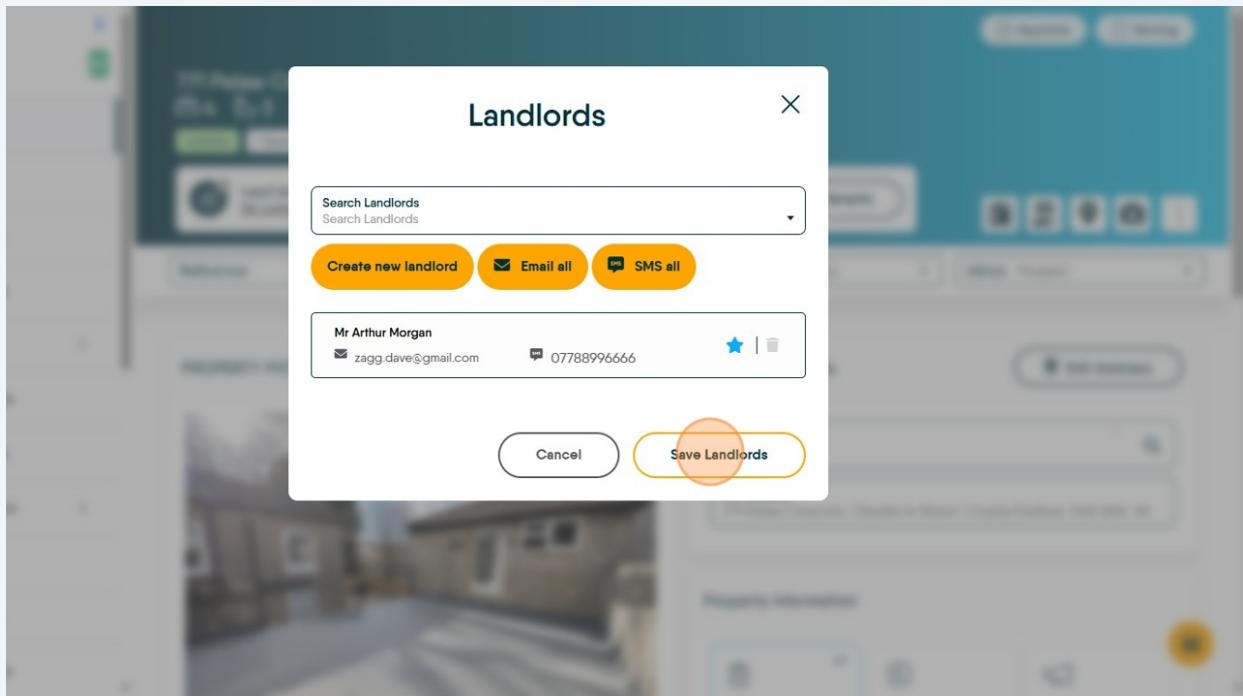
3 Click "Search Landlords" to find the new landlord information, or select the option to create the new landlord record.



4 You need to make the new landlord the Primary Landlord, by clicking on the black star and turning it blue. Click here. You can then delete the old landlord (if required)



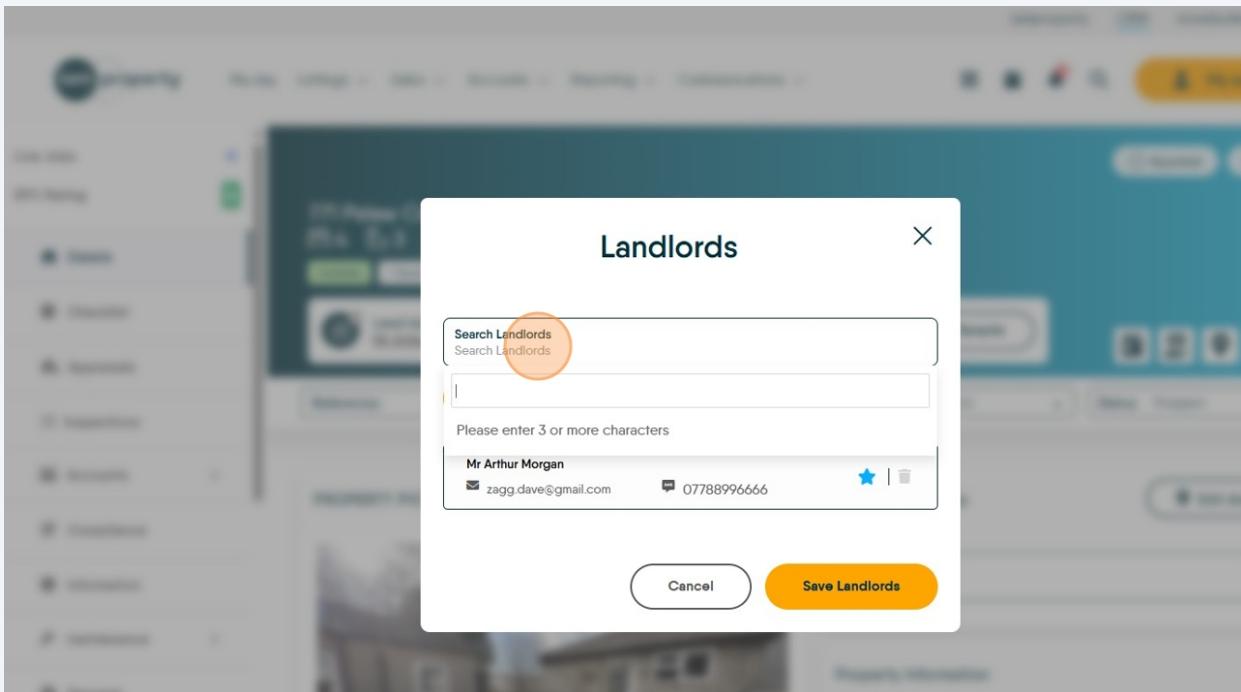
5 Click "Save Landlords"



## Adding an Additional Landlord

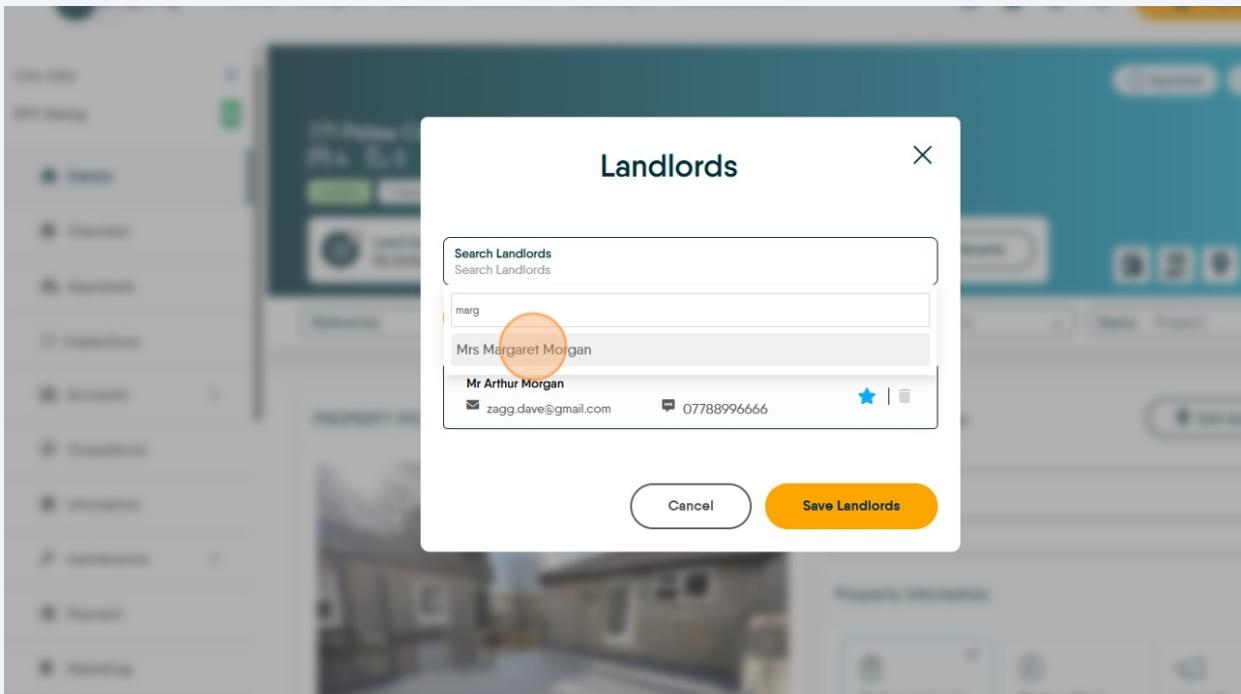
6 Click "View landlords"

7 Click "Search Landlords"

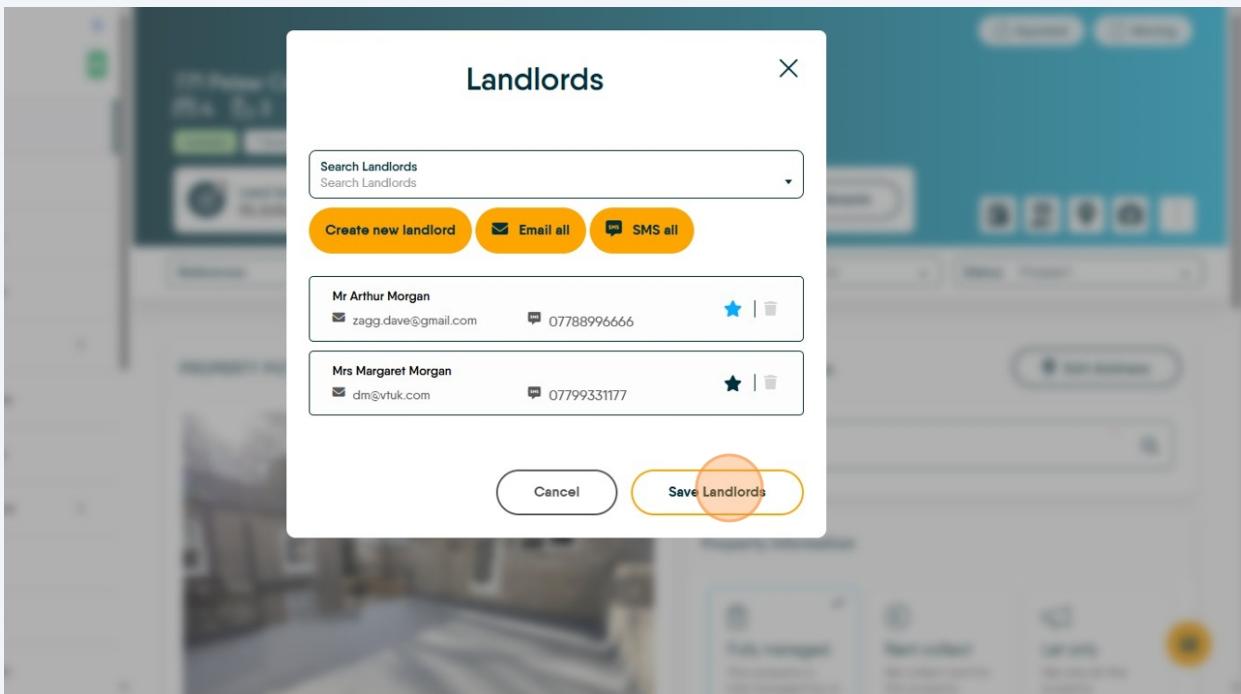


8 Type "marg"

9 Click "Mrs Margaret Morgan"

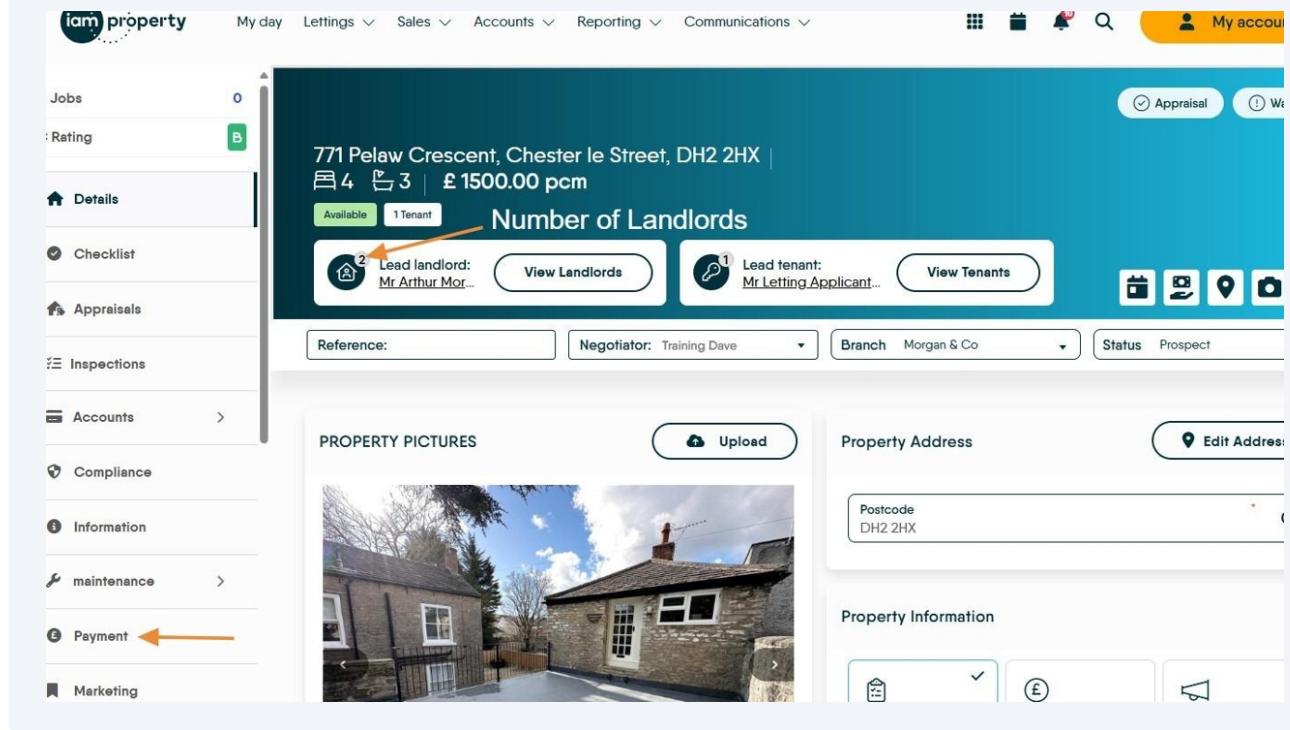


10 Click "Save Landlords"



11

You will now see the name of the Lead Landlord and a number (in this case 2) to show how many additional landlords there are. Remember to also update the financial details for both landlords in the 'Payment' tab



The screenshot shows the iAm Property software interface. The main content area displays a property listing for 771 Pelaw Crescent, Chester le Street, DH2 2HX. The listing includes a thumbnail image of the property, a summary table with 4 bedrooms, 3 bathrooms, and £1500.00 pcm rent, and a 'Number of Landlords' section showing 2 landlords and 1 tenant. Below this, there are sections for 'PROPERTY PICTURES' (with a thumbnail of the property), 'Property Address' (with a 'Postcode' field containing DH2 2HX), and 'Property Information' (with a 'Status' dropdown set to 'Prospect'). The left sidebar contains navigation links for 'Jobs', 'Rating', 'Details', 'Checklist', 'Appraisals', 'Inspections', 'Accounts' (which is currently selected and highlighted with an orange arrow), 'Compliance', 'Information', 'Maintenance', and 'Marketing'.



Alert! you need to inform your tenant of the new Landlord details as soon as possible after the change. "S3 (1) **the new landlord shall give notice in writing of the assignment, and of his name and address, to the tenant** not later than the next day on which rent is payable under the tenancy or, if that is within two months of the assignment, the end of that period of two months."

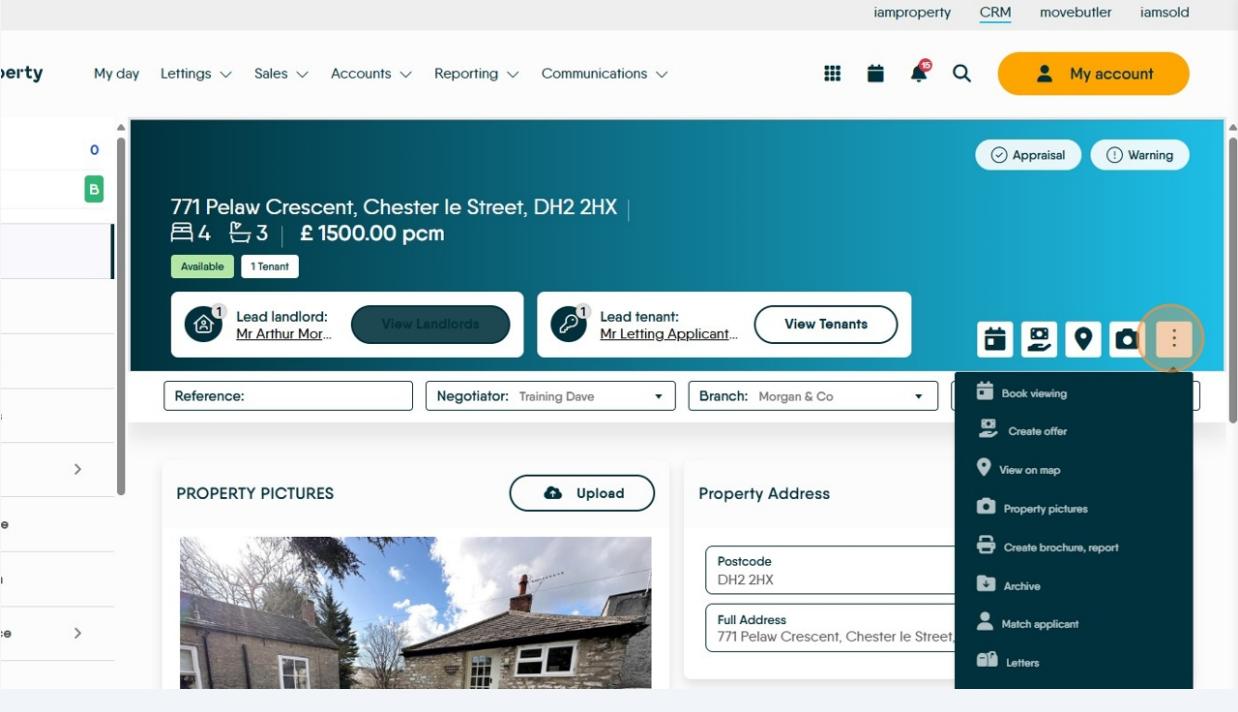
There are two potential consequences of not complying:

1. Being fined (up to £2500)
2. Both the former ("the old landlord") and new landlord can be held jointly and severally liable for any breaches of the tenancy agreement. However, the legislation does state that the old landlord can protect themselves by providing their own notice in writing of the assignment, and providing the new landlord's name and last-known address.

## Sending the Notification Letter

12

You will need to send your tenant a letter notifying them of the change of landlord, this can be done from within CRM. Click here (if your letter is saved against the property).



771 Pelaw Crescent, Chester le Street, DH2 2HX |  
4 3 | £1500.00 pcm

Available 1 Tenant

Lead landlord: Mr Arthur Mor... View Landlords

Lead tenant: Mr Letting Applicant... View Tenants

Reference: Negotiator: Training Dave Branch: Morgan & Co

PROPERTY PICTURES Upload

Property Address

Postcode: DH2 2HX

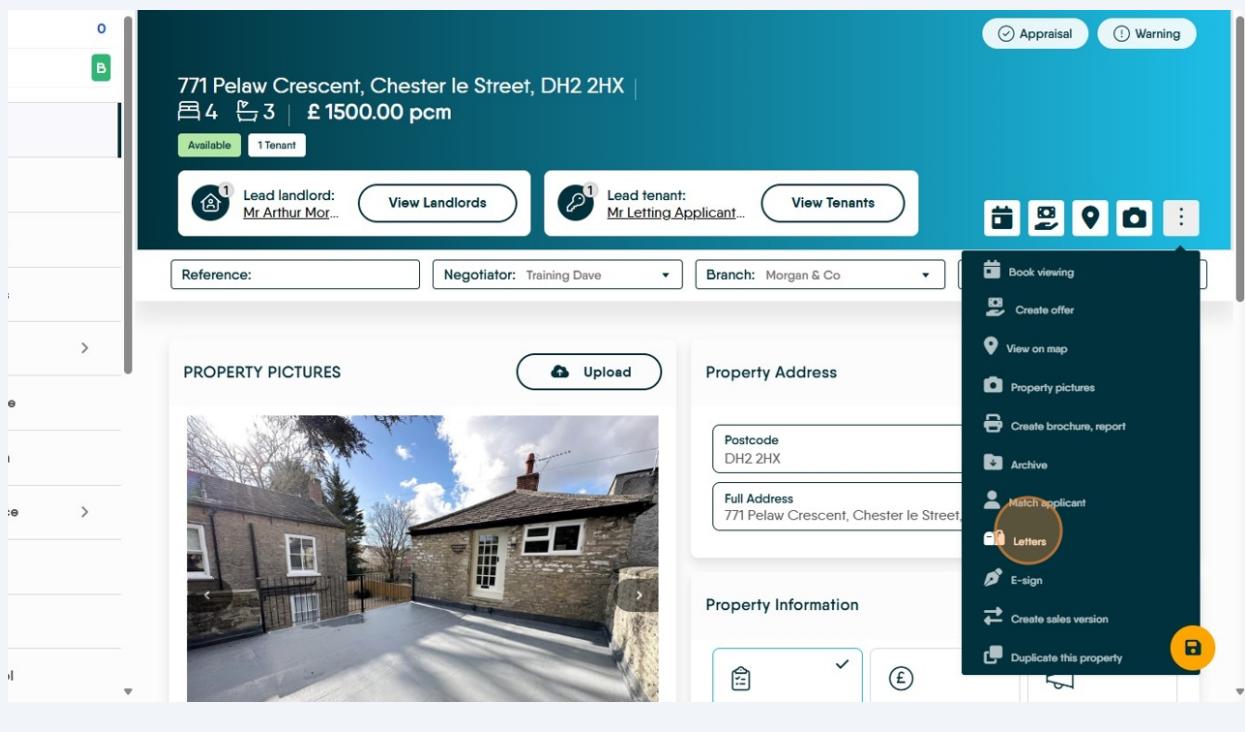
Full Address: 771 Pelaw Crescent, Chester le Street

Letters



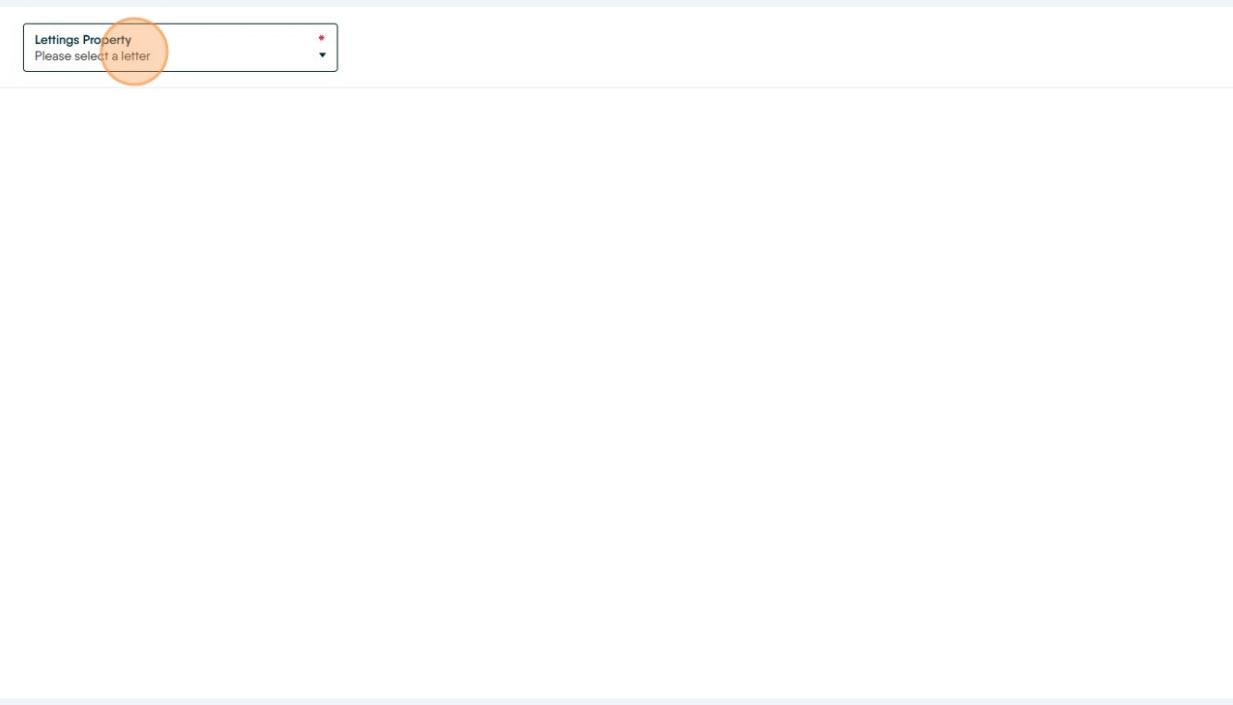
Alert! The letter will have been added to CRM at your request and added to the area of CRM you requested e.g. Property or Tenant etc.

**13** Click "Letters"



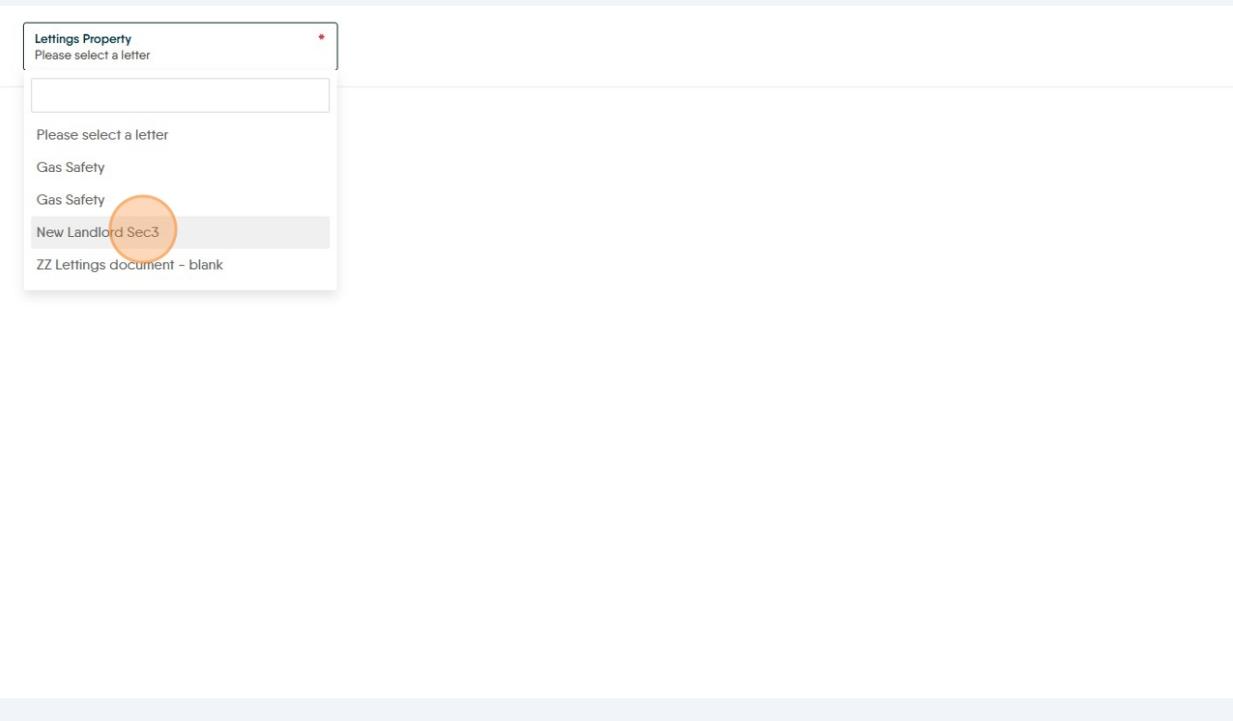
The screenshot shows a property listing for 771 Pelaw Crescent, Chester le Street, DH2 2HX. The listing includes 4 bedrooms, 3 bathrooms, and a price of £1500.00 pcm. The sidebar menu on the right is open, showing various options: Book viewing, Create offer, View on map, Property pictures, Create brochure, report, Archive, Match applicant, Letters (which is highlighted with a yellow circle), E-sign, Create sales version, and Duplicate this property. The 'Letters' option is specifically circled in yellow.

**14** Click "Please select a letter"



The screenshot shows a dropdown menu for 'Lettings Property' with the instruction 'Please select a letter' and a yellow circle highlighting the dropdown arrow. The menu is currently empty.

**15** Click (in this case) "New Landlord Sec3" or the name of your letter.



Lettings Property \*  
Please select a letter

Please select a letter

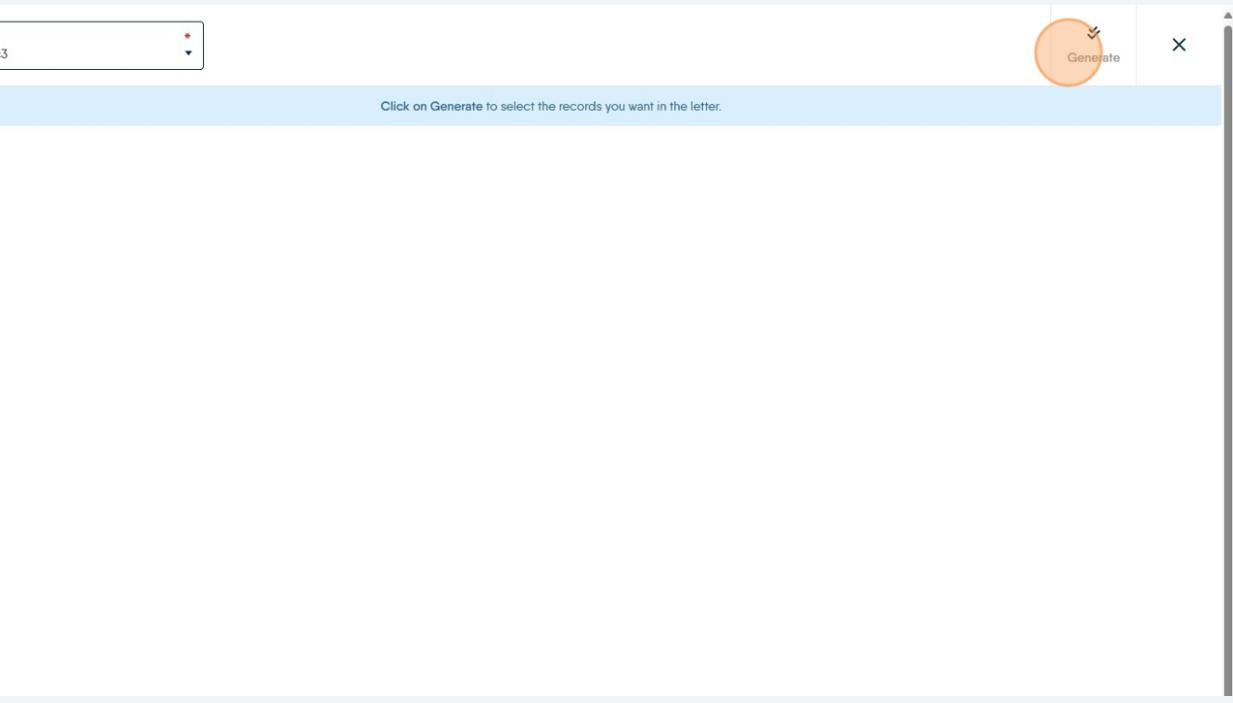
Gas Safety

Gas Safety

New Landlord Sec3

ZZ Lettings document - blank

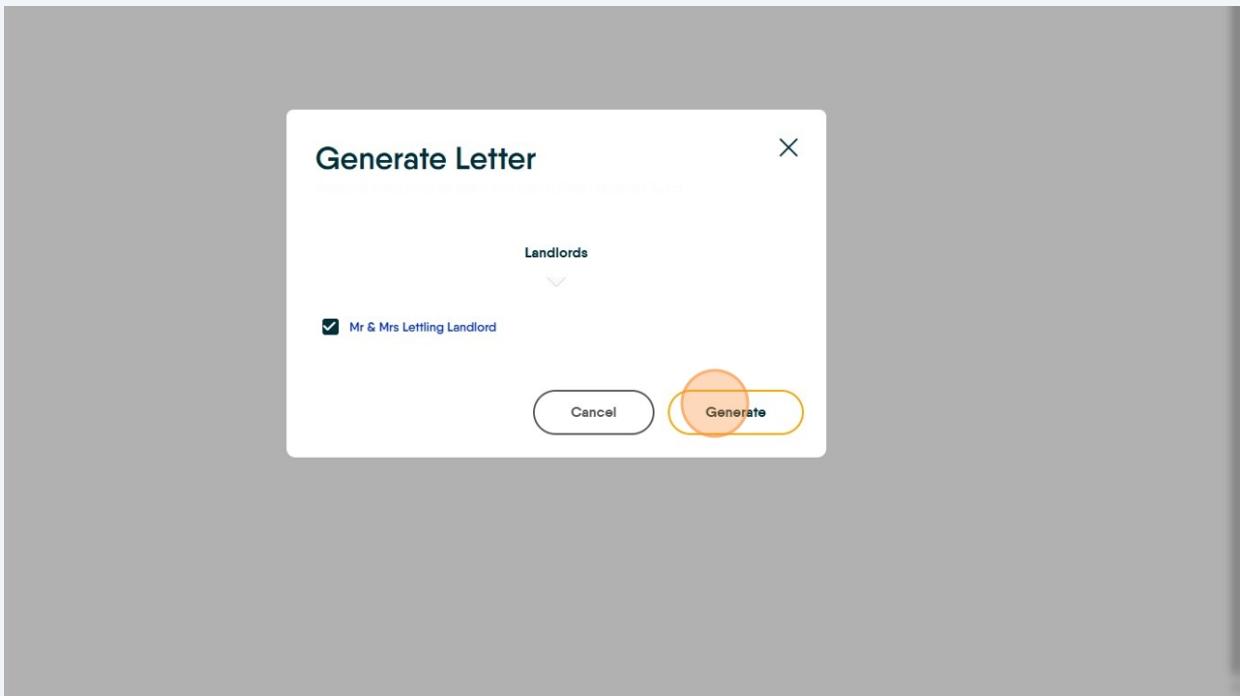
**16** Click "Generate"



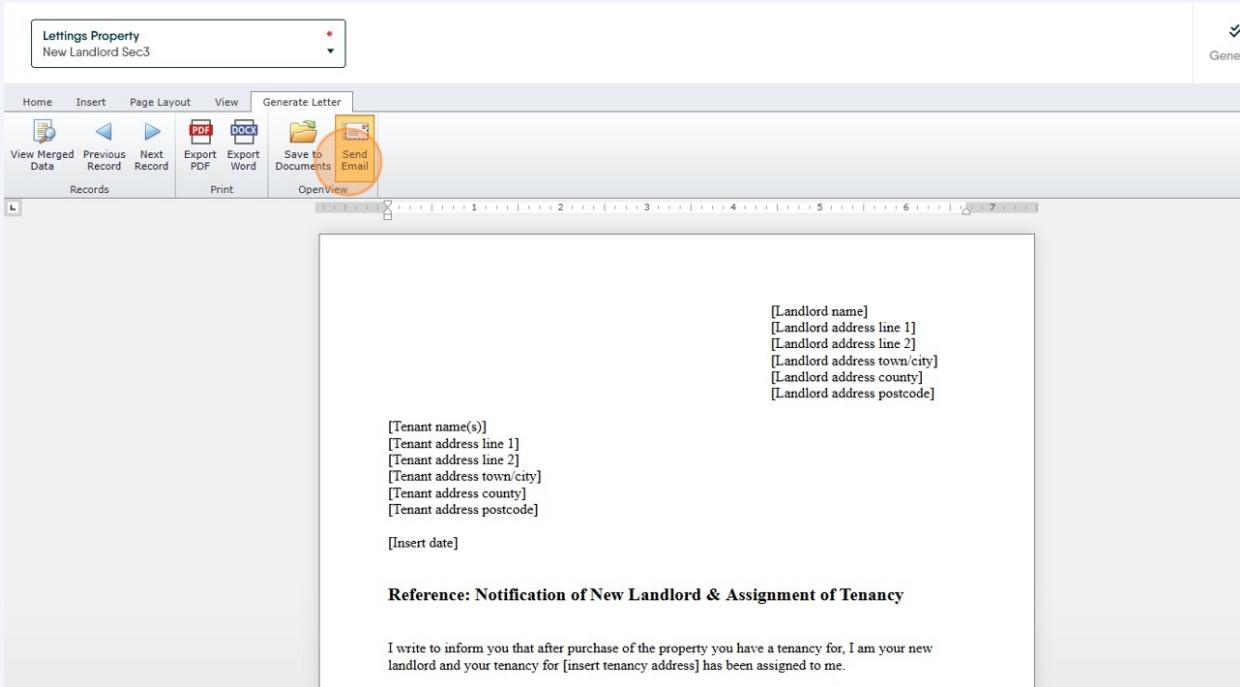
Click on Generate to select the records you want in the letter.

Generate

17 Check the details of the Landlords. Click "Generate"

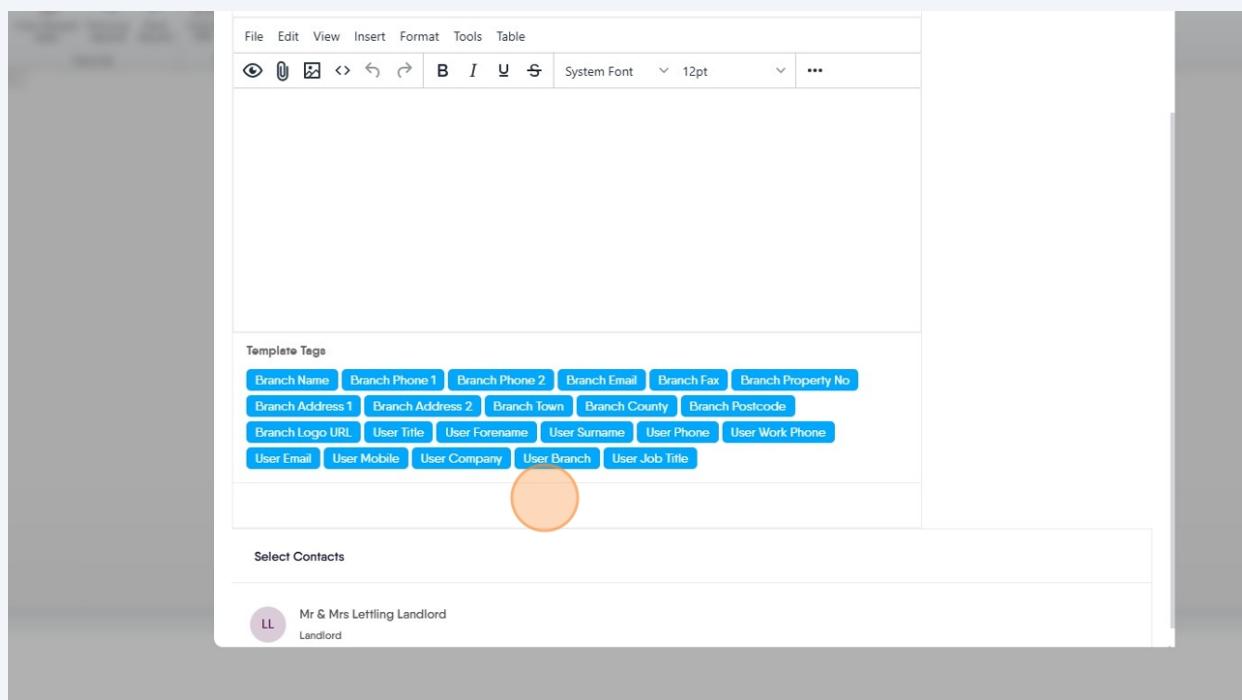
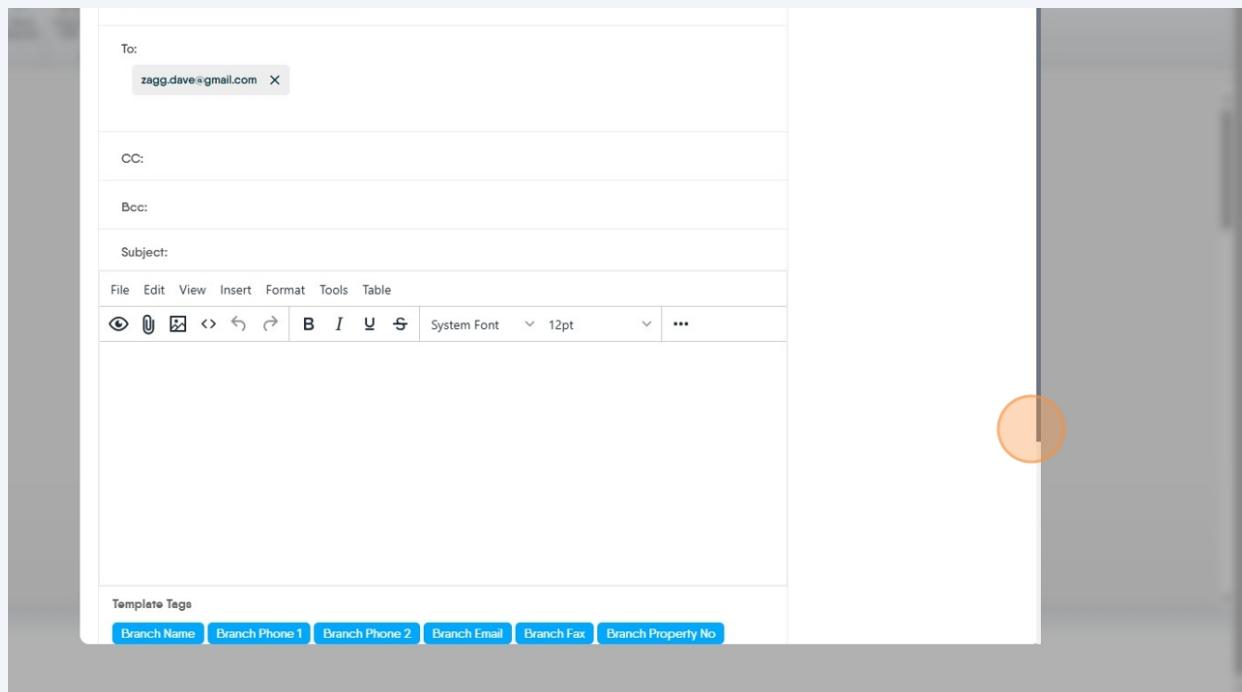


18 Complete the document as required, if you have merge tags then the data will be automatically added, otherwise edit the document and Save. To send the letter, Click "Send Email" the letter will be converted to PDF and added to the email as an attachment. Save to Documents saves the letter to the documents folder of the (in this case) Property.

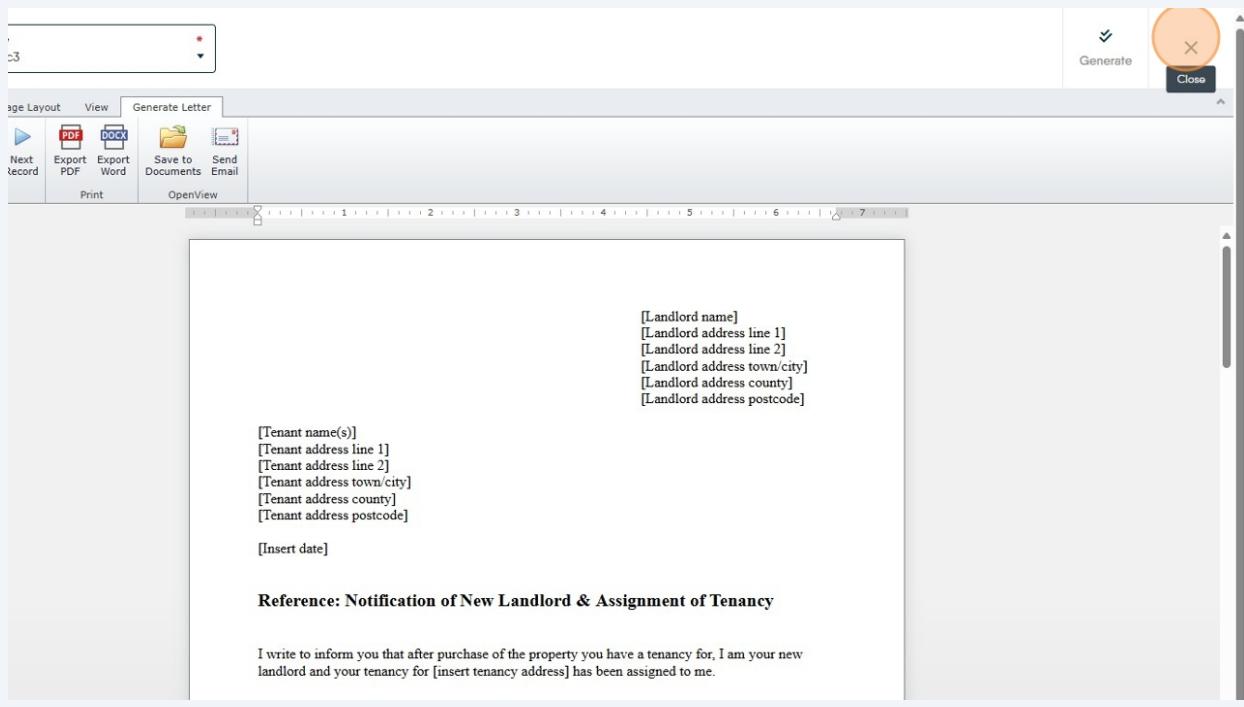


19

Type your covering email, or use a template and then send the email.  
Click "Send Email"

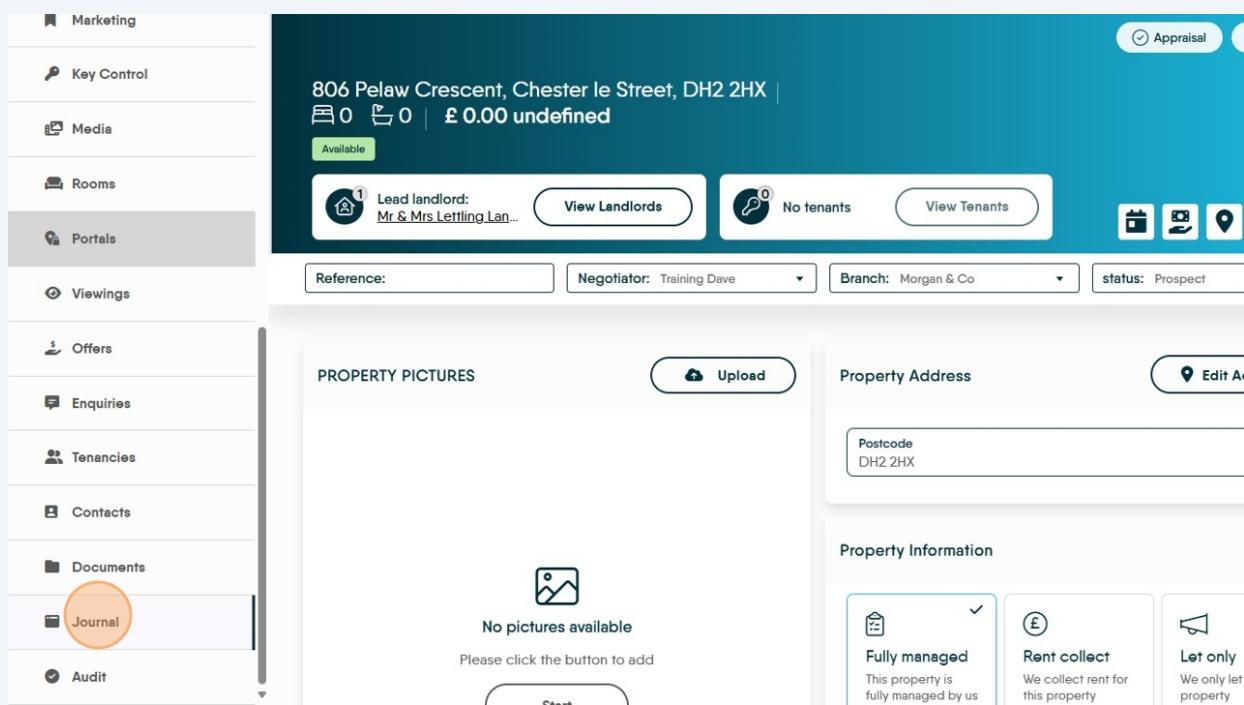


20 Click here to close the screen and return to the Property Record.



21 A copy of the email and documents will be in the Journal

Click "Journal"  
Click here.





Alert! Don't forget to update the Landlords Payment details in the Payment menu of the Property Record.

22

To update Landlord payment details, click "Payment"

23

Click here.  
Click "Edit"

Live Jobs 0

EPC Rating B

Details

Checklist

Appraisals

Inspections

Accounts >

Compliance

Information

maintenance >

Payment

Marketing

Key Control

Maintain Float 0.00 Statement Number 1

Fixed Payment  Amount 0.00

Payment Notes **B** **I** **U** **XX**

Payment Memo

Options

AM 7

Arthur morgan  
zagg.dave@gmail.com  
07788996666

0.00 % 0.00

Name \_\_\_\_\_ Postcode \_\_\_\_\_

Address \_\_\_\_\_

Drag and drop files here or click to upload Statement Attachments

Live Jobs 0

EPC Rating B

Details

Checklist

Appraisals

Inspections

Accounts >

Compliance

Information

maintenance >

Payment

Marketing

Key Control

Maintain Float 0.00 Statement Number 1

Fixed Payment  Amount 0.00

Payment Notes **B** **I** **U** **XX**

Payment Memo

Edit

AM 7

Arthur morgan  
zagg.dave@gmail.com  
07788996666

0.00 % 0.00

Name \_\_\_\_\_ Postcode \_\_\_\_\_

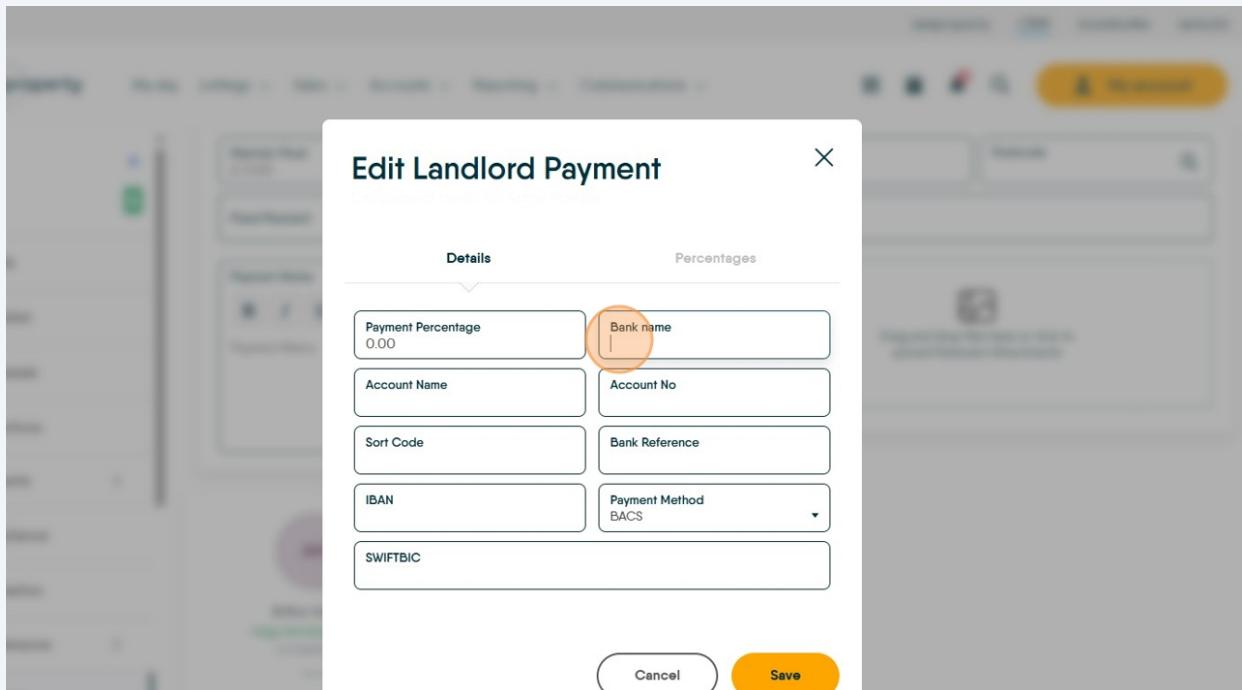
Address \_\_\_\_\_

Drag and drop files here or click to upload Statement Attachments

24

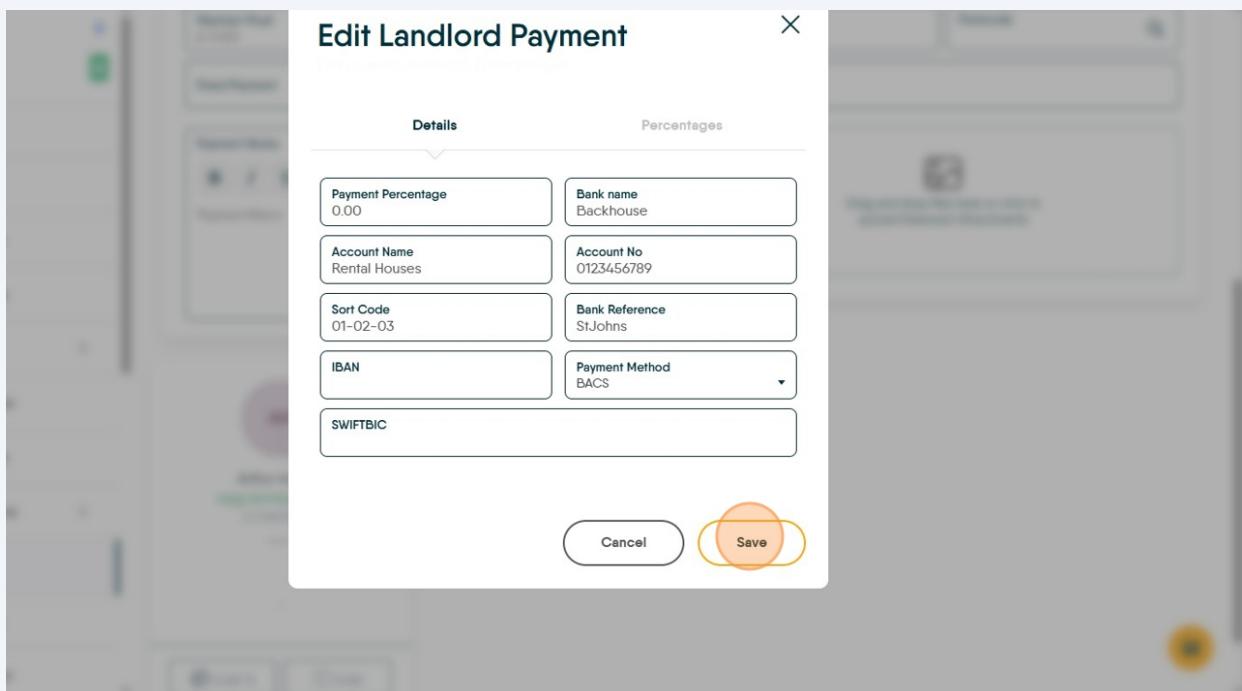
Complete all the fields in here. n.b. IBAN and SWITBIC are not needed for UK based payments. If this isn't completed you will only be able to pay your landlord via Cheque, or bank transfer if you have another record of their banking details.

You WILL NOT be able to pay via BACS



25

Click "Save"



26 Click here.

Maintain Float  
£ 0.00

Statement Number  
1

Fixed Payment

Amount  
£ 0.00

Payment Notes

**B** **I** **U** **☒**

Payment Memo

Name \_\_\_\_\_ Postcode \_\_\_\_\_

Address \_\_\_\_\_

Drag and drop files here or click to upload Statement Attachments

Arthur morgan  
zagg.dave@gmail.com  
07788996666

Backhouse  
Rental Houses  
01-02-03 / 0123456789  
St.Johns

Save Changes

100.00 %  600.00