

# Changing Landlord Information/Ownership In CRM



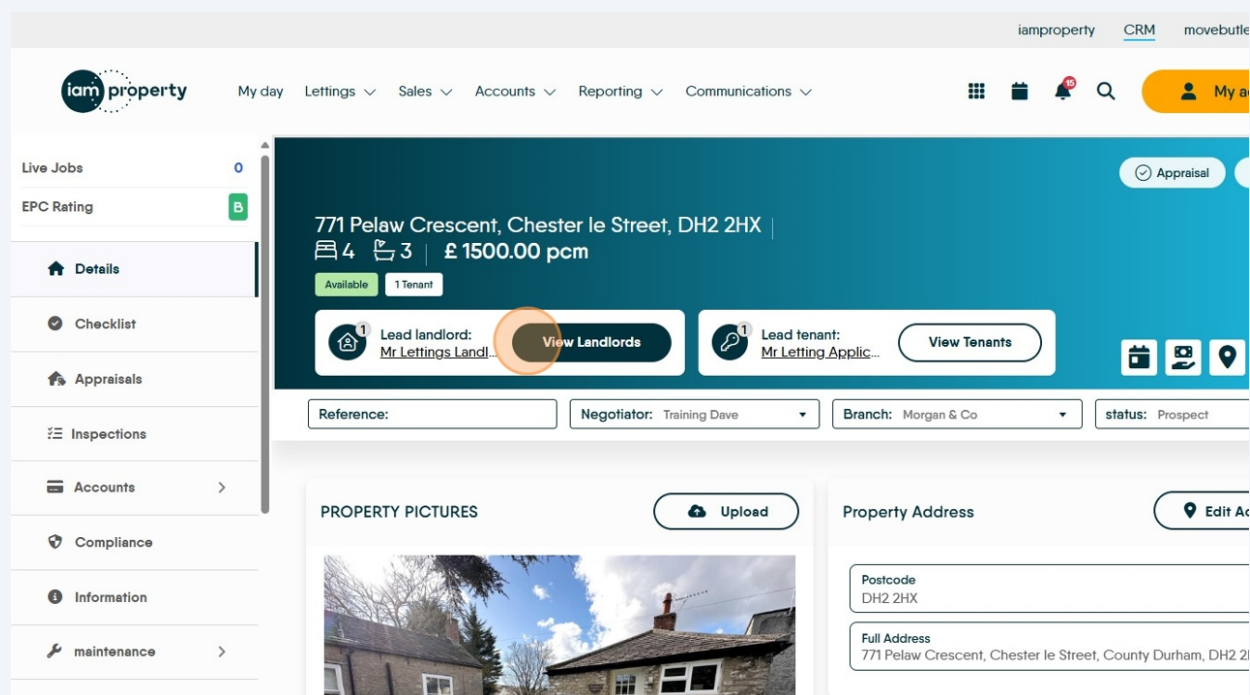
This guide provides a straightforward process for updating landlord information in the CRM system, ensuring that property records are accurate and current.

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.

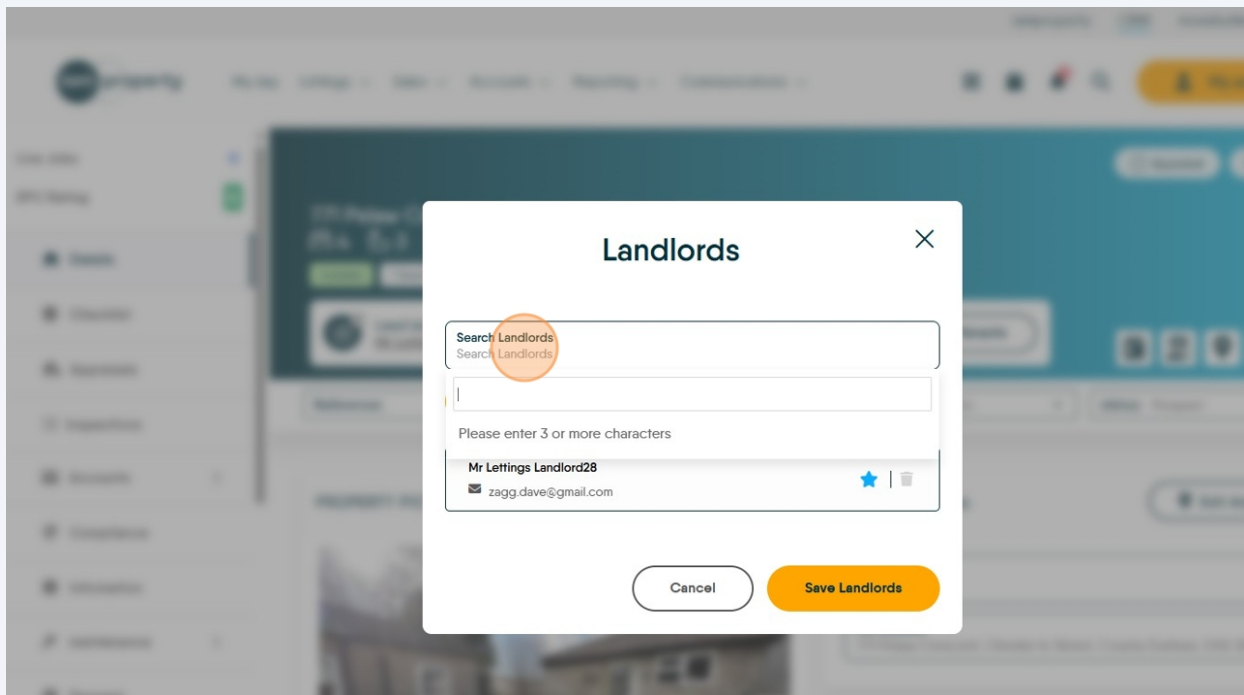
## To Change Landlord/Ownership

- 2 Click "View landlords"



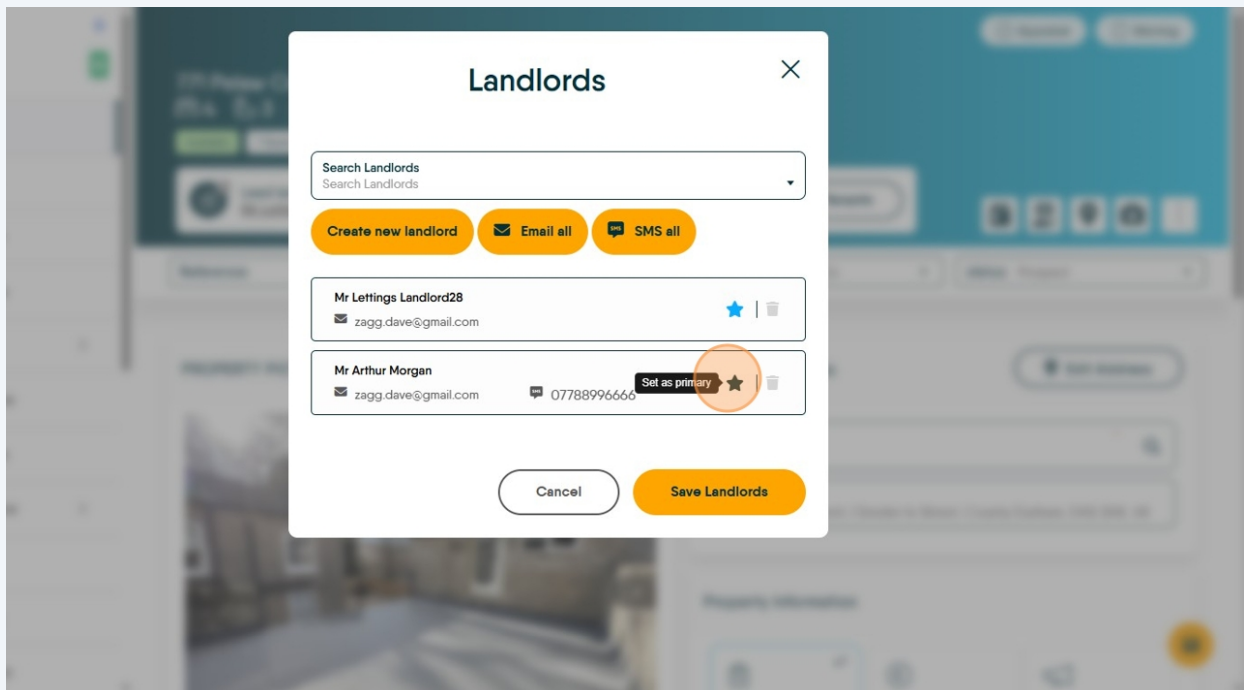
3

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

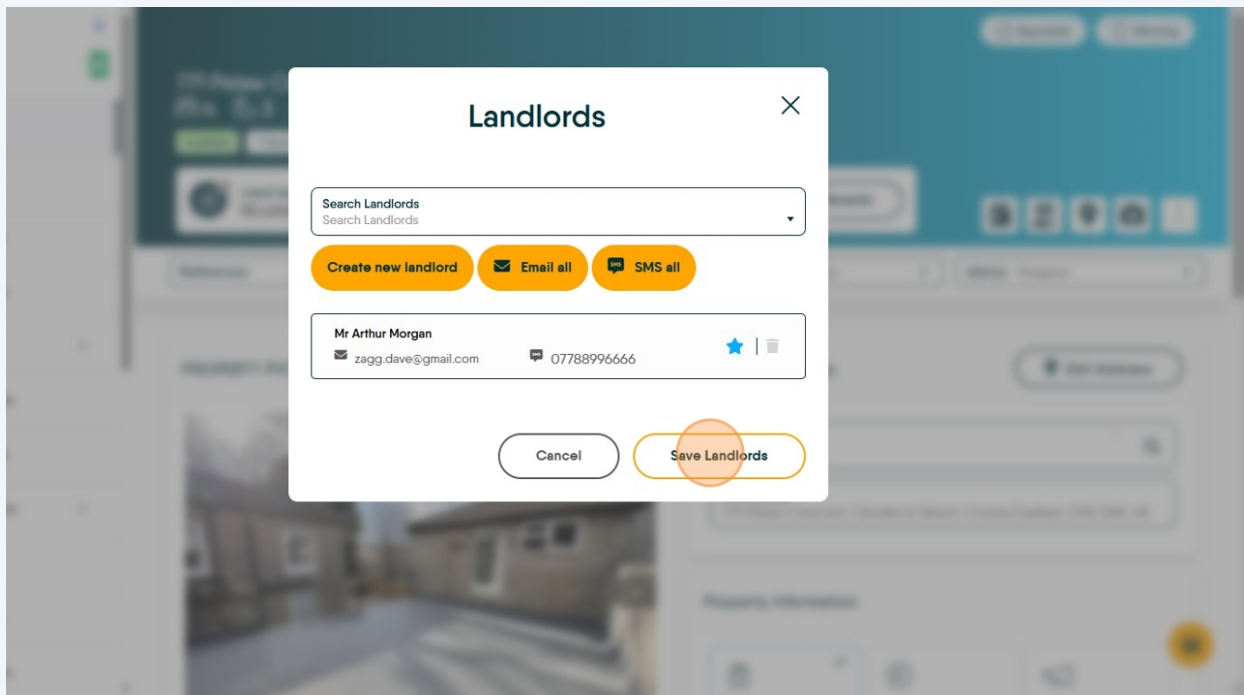


4

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)

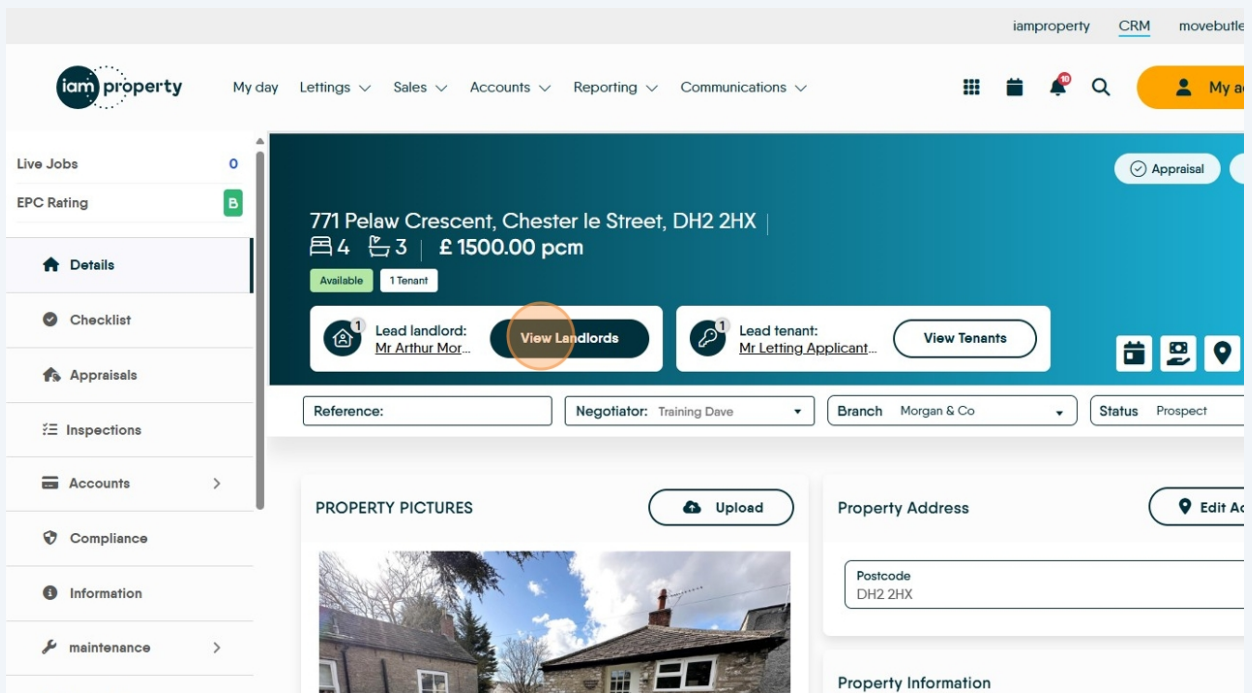


5 Click "Save Landlords"

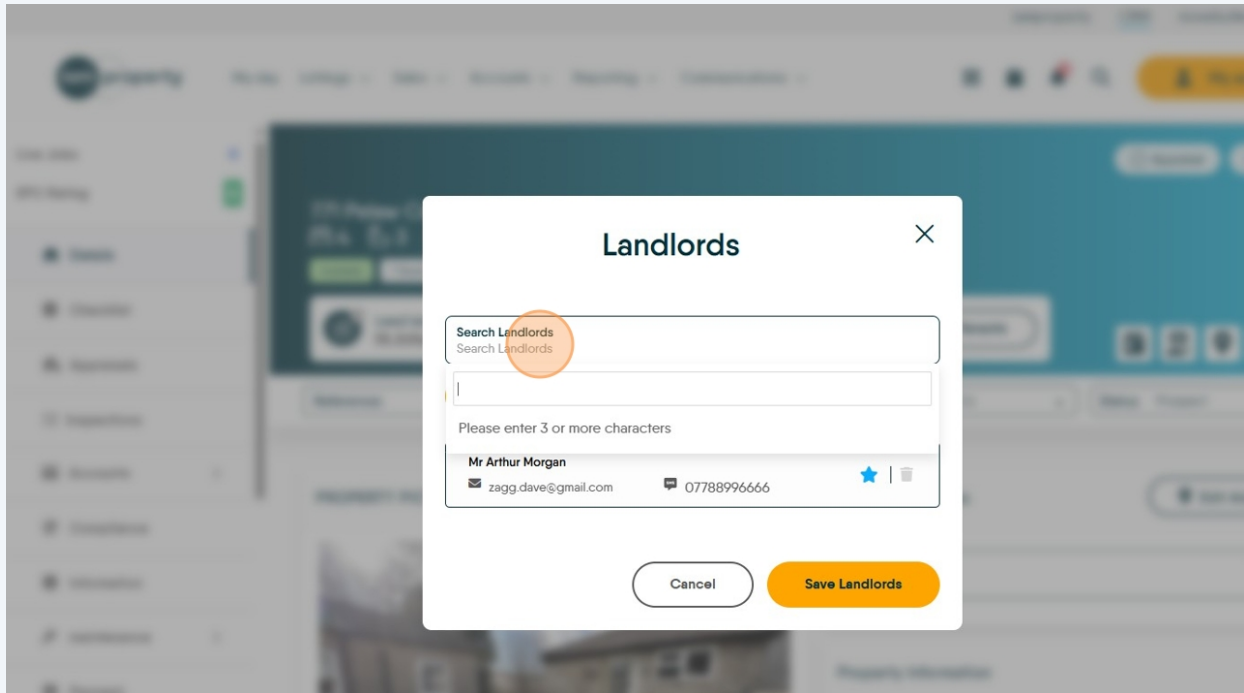


## Adding an Additional Landlord

6 Click "View landlords"

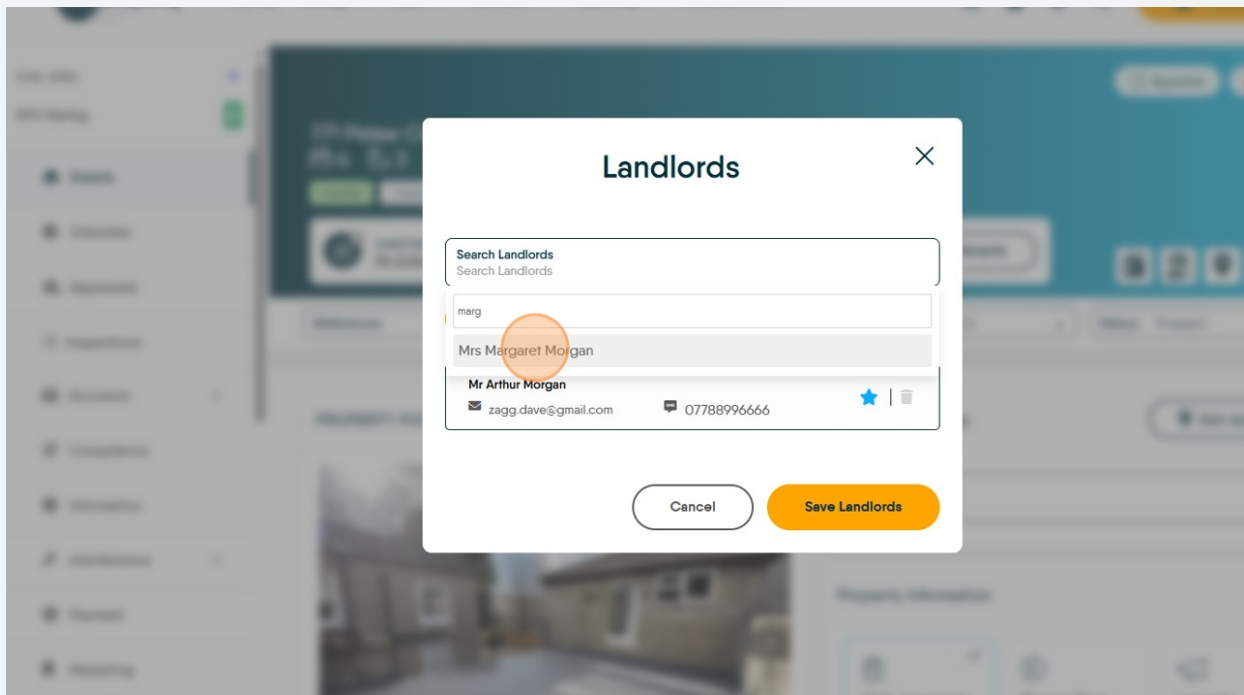


7 Click "Search Landlords"

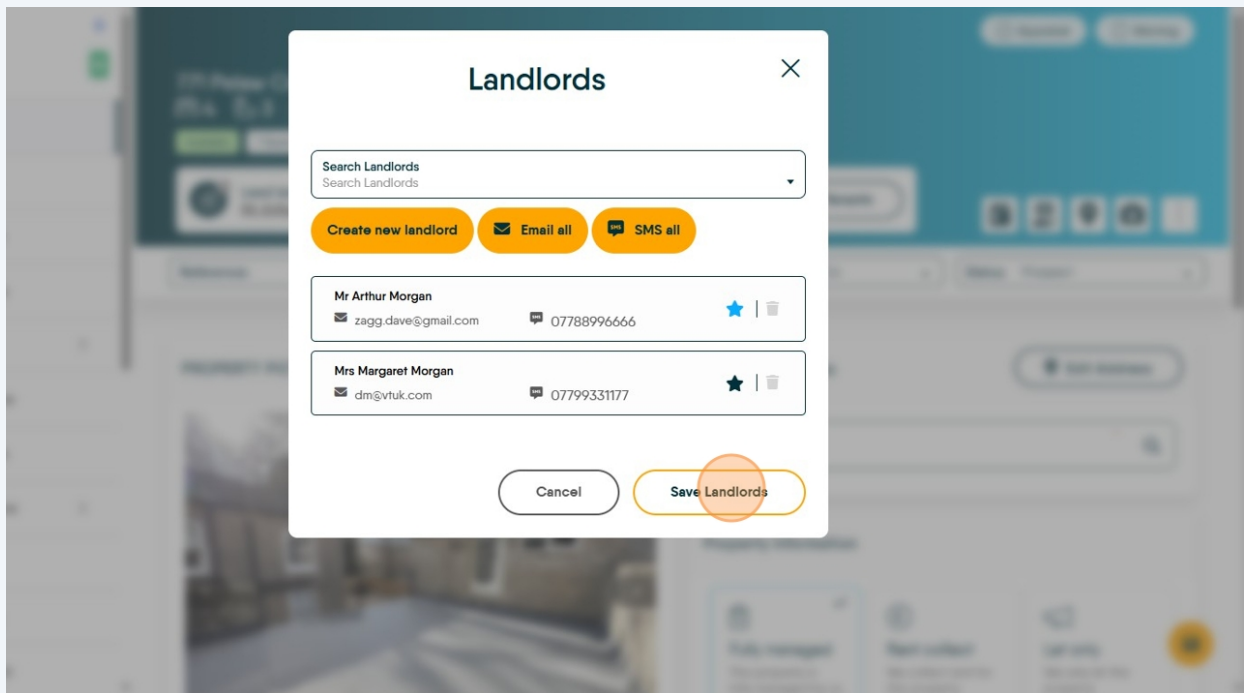


8 Type "marg"

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



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).

The screenshot shows the iamproperty CRM interface. The top navigation bar includes 'iamproperty', 'CRM', 'movebutler', and 'iamsold'. The sidebar on the left has 'My day', 'Lettings', 'Sales', 'Accounts', 'Reporting', and 'Communications'. The main content area displays property details for '771 Pelaw Crescent, Chester le Street, DH2 2HX'. It includes a status bar with 'Available' and '1 Tenant', and buttons for 'View Landlords' and 'View Tenants'. A dropdown menu is open on the right, showing options like 'Book viewing', 'Create offer', 'View on map', 'Property pictures', 'Create brochure, report', 'Archive', 'Match applicant', and 'Letters'. The 'Letters' option is highlighted.



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"

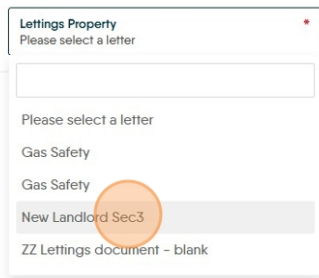
The screenshot shows a property management software interface. At the top, there's a header bar with 'Appraisal' and 'Warning' buttons. Below this, the property address '771 Pelaw Crescent, Chester le Street, DH2 2HX' is displayed, along with '4' bedrooms, '3' bathrooms, and a price of '£1500.00 pcm'. There are buttons for 'View Landlords' and 'View Tenants'. A dropdown menu is open on the right side, showing options like 'Book viewing', 'Create offer', 'View on map', 'Property pictures', 'Create brochure, report', 'Archive', 'Match applicant', 'Letters' (highlighted with an orange circle), 'E-sign', 'Create sales version', and 'Duplicate this property'. The main content area shows 'PROPERTY PICTURES' with an 'Upload' button and a photo of the property. To the right, there's a 'Property Address' section with 'Postcode: DH2 2HX' and 'Full Address: 771 Pelaw Crescent, Chester le Street'. Below that is a 'Property Information' section.

### 14 Click "Please select a letter"

The screenshot shows a dropdown menu in the software interface. The dropdown is titled 'Lettings Property' and shows the text 'Please select a letter' with a red asterisk and a dropdown arrow. The dropdown is highlighted with an orange circle.

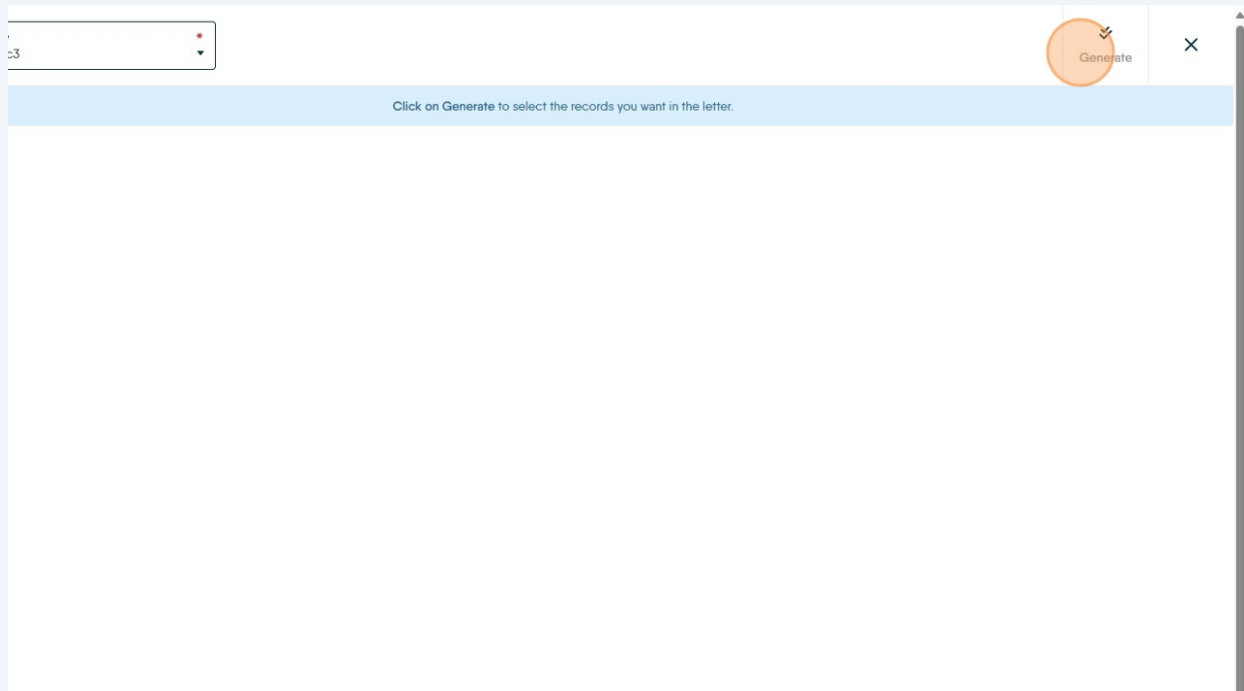


**15** Click (in this case) "New Landlord Sec3" or the name of your letter.



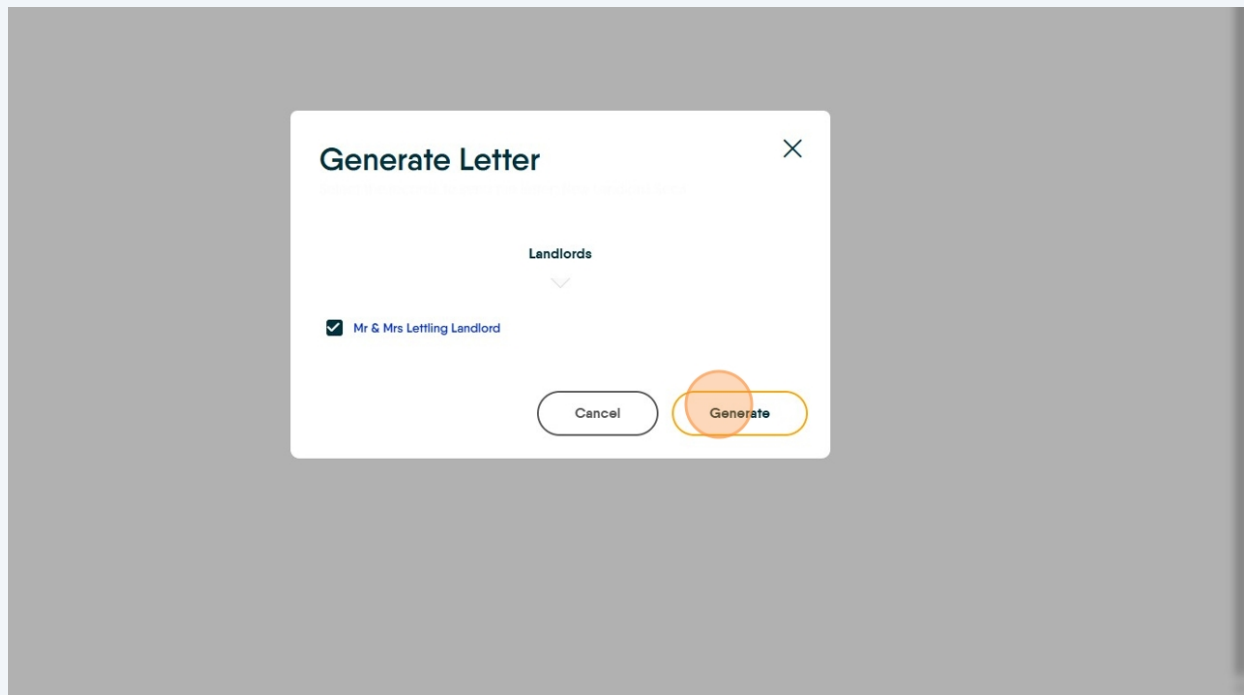
The screenshot shows a web interface with a dropdown menu titled "Lettings Property" and the instruction "Please select a letter". The menu is open, displaying a list of options: "Please select a letter", "Gas Safety", "Gas Safety", "New Landlord Sec3", and "ZZ Lettings document - blank". The option "New Landlord Sec3" is highlighted with a grey background and an orange circle, indicating it is the correct selection.

**16** Click "Generate"

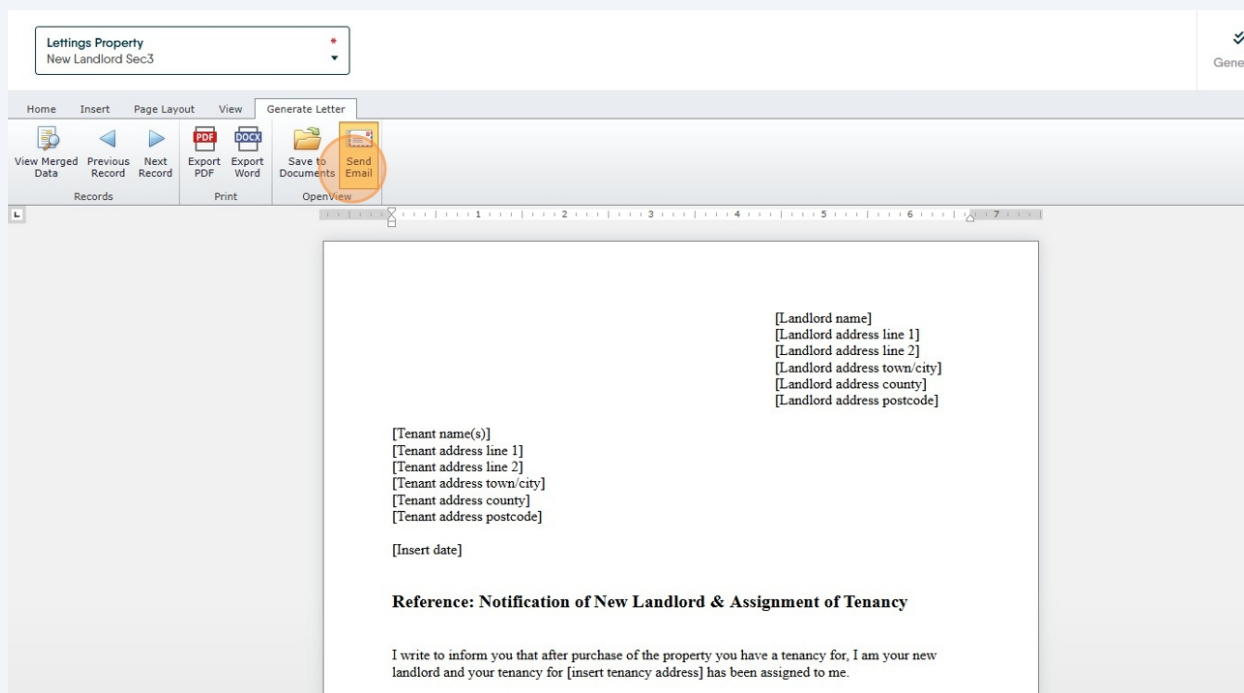


The screenshot shows a web interface with a dropdown menu on the left containing the text "Sec3". On the right, there is a "Generate" button with a checkmark icon, highlighted with an orange circle. Below the button, a blue message bar contains the text "Click on Generate to select the records you want in the letter." The main area of the interface is empty.

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"

To: zagg.dave@gmail.com X

CC:

Bcc:

Subject:

File Edit View Insert Format Tools Table

System Font 12pt

Template Tags

Branch Name Branch Phone 1 Branch Phone 2 Branch Email Branch Fax Branch Property No

File Edit View Insert Format Tools Table

System Font 12pt

Template Tags

Branch Name Branch Phone 1 Branch Phone 2 Branch Email Branch Fax Branch Property No

Branch Address 1 Branch Address 2 Branch Town Branch County Branch Postcode

Branch Logo URL User Title User Forename User Surname User Phone User Work Phone

User Email User Mobile User Company User Branch User Job Title

Select Contacts

LL Mr & Mrs Lettling Landlord  
Landlord

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

[-3]

Generate Close

Page Layout View Generate Letter

Next record Export PDF Export Word Save to Documents Send Email

Print OpenView

[Landlord name]  
[Landlord address line 1]  
[Landlord address line 2]  
[Landlord address town/city]  
[Landlord address county]  
[Landlord address postcode]

[Tenant name(s)]  
[Tenant address line 1]  
[Tenant address line 2]  
[Tenant address town/city]  
[Tenant address county]  
[Tenant address postcode]

[Insert date]

**Reference: Notification of New Landlord & Assignment of Tenancy**

I write to inform you that after purchase of the property you have a tenancy for, I am your new landlord and your tenancy for [insert tenancy address] has been assigned to me.

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

Click "Journal"  
Click here.

Marketing

Key Control

Media

Rooms

Portals

Viewings

Offers

Enquiries

Tenancies

Contacts

Documents

Journal

Audit

Appraisal

806 Pelaw Crescent, Chester le Street, DH2 2HX |  
0 0 | £ 0.00 undefined

Available

Lead landlord: Mr & Mrs Lettling Lan... View Landlords

No tenants View Tenants

Reference: Negotiator: Training Dave Branch: Morgan & Co status: Prospect

PROPERTY PICTURES

Upload

No pictures available  
Please click the button to add

Property 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




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 <input type="checkbox"/>	Amount 0.00
<b>Payment Notes</b> B I U  Payment Memo	

Name	Postcode
Address	
Drag and drop files here or click to upload Statement Attachments	

Options

AM 7


Arthur morgan  
zagg.dave@gmail.com  
07788996666

0.00 % £ 0.00

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 <input type="checkbox"/>	Amount 0.00
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Name	Postcode
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Edit

AM 7

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07788996666

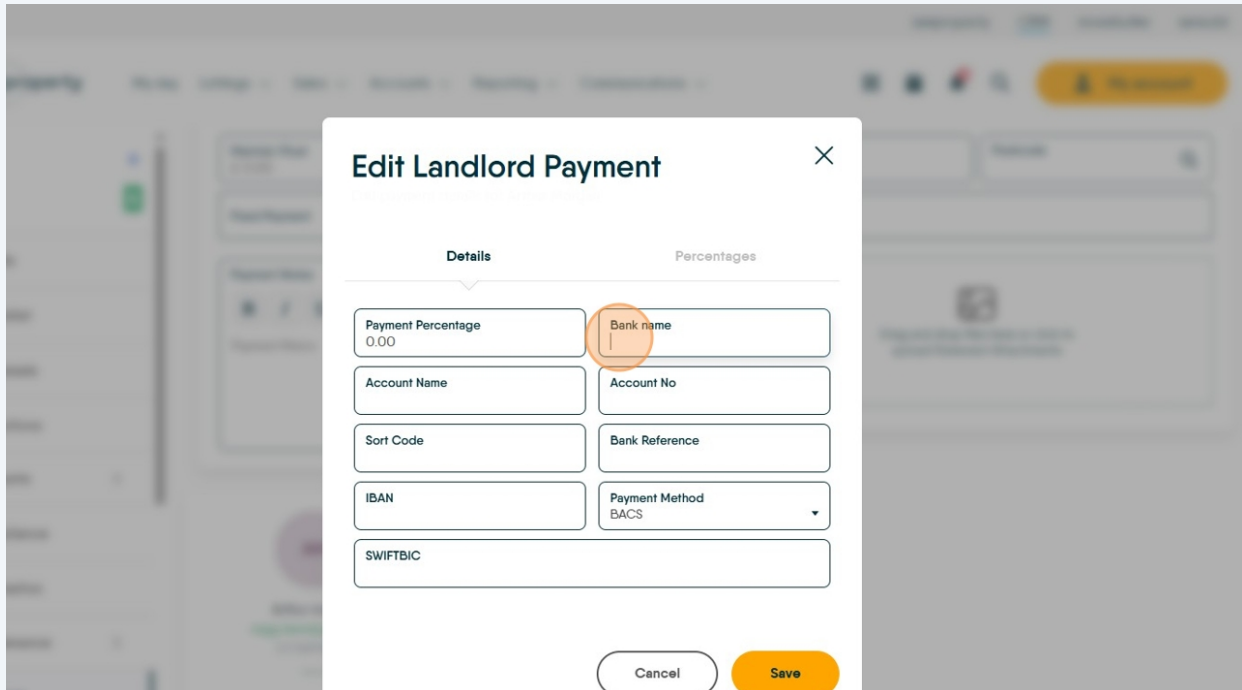
0.00 % £ 0.00



24

Complete all the fields in here. n.b. IBAN and SWIFTBIC 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



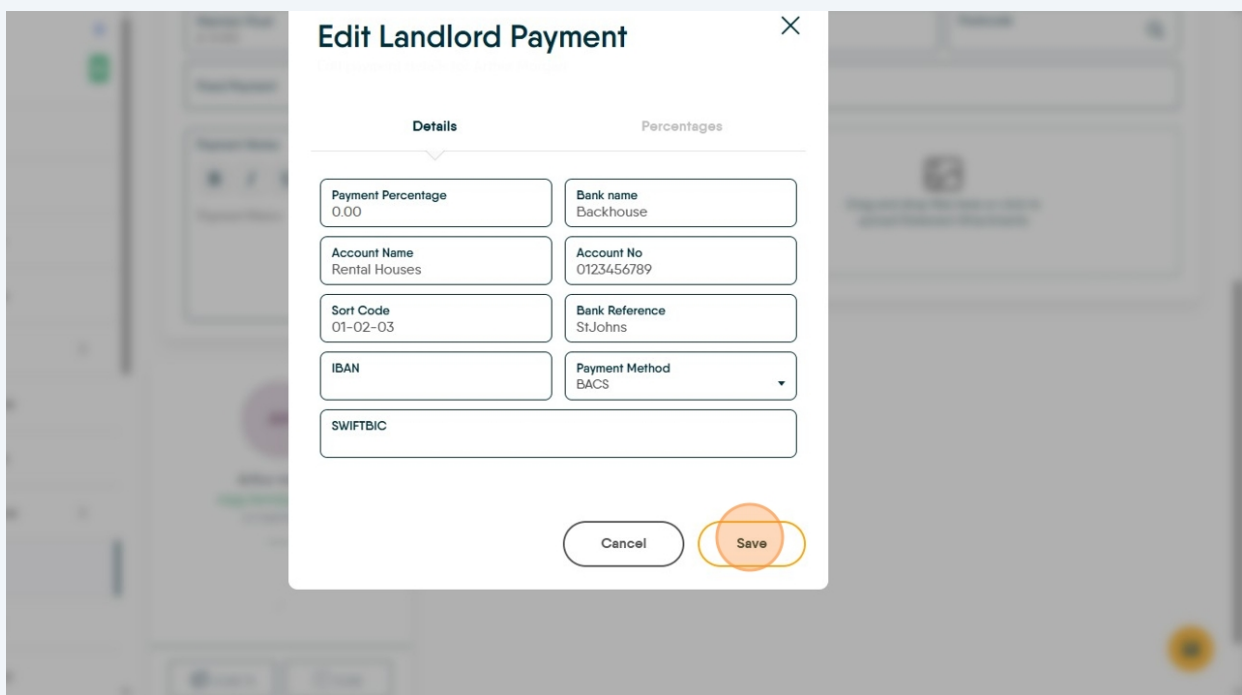
The screenshot shows a web application interface with a modal window titled "Edit Landlord Payment". The modal has two tabs: "Details" (selected) and "Percentages". The "Details" tab contains several input fields arranged in a grid. The "Bank name" field is highlighted with an orange circle. Below the modal, there are "Cancel" and "Save" buttons.

Details		Percentages
Payment Percentage 0.00	Bank name	
Account Name	Account No	
Sort Code	Bank Reference	
IBAN	Payment Method BACS	
SWIFTBIC		

Cancel Save

25

Click "Save"



The screenshot shows the same "Edit Landlord Payment" modal window, but now the fields are populated with data. The "Bank name" field is "Backhouse". The "Account Name" is "Rental Houses", "Account No" is "0123456789", "Sort Code" is "01-02-03", and "Bank Reference" is "StJohns". The "Payment Method" is "BACS". The "Save" button is highlighted with an orange circle.

Details		Percentages
Payment Percentage 0.00	Bank name Backhouse	
Account Name Rental Houses	Account No 0123456789	
Sort Code 01-02-03	Bank Reference StJohns	
IBAN	Payment Method BACS	
SWIFTBIC		

Cancel Save

**26** Click here.

0

B

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

AM

Arthur morgan  
zag.g.dave@gmail.com  
07788996666

Backhouse  
Rental Houses  
01-02-03 / 0123456789  
StJohns

100.00 %

£ 600.00

Save Changes