

Adding a New Landlord Record in CRM

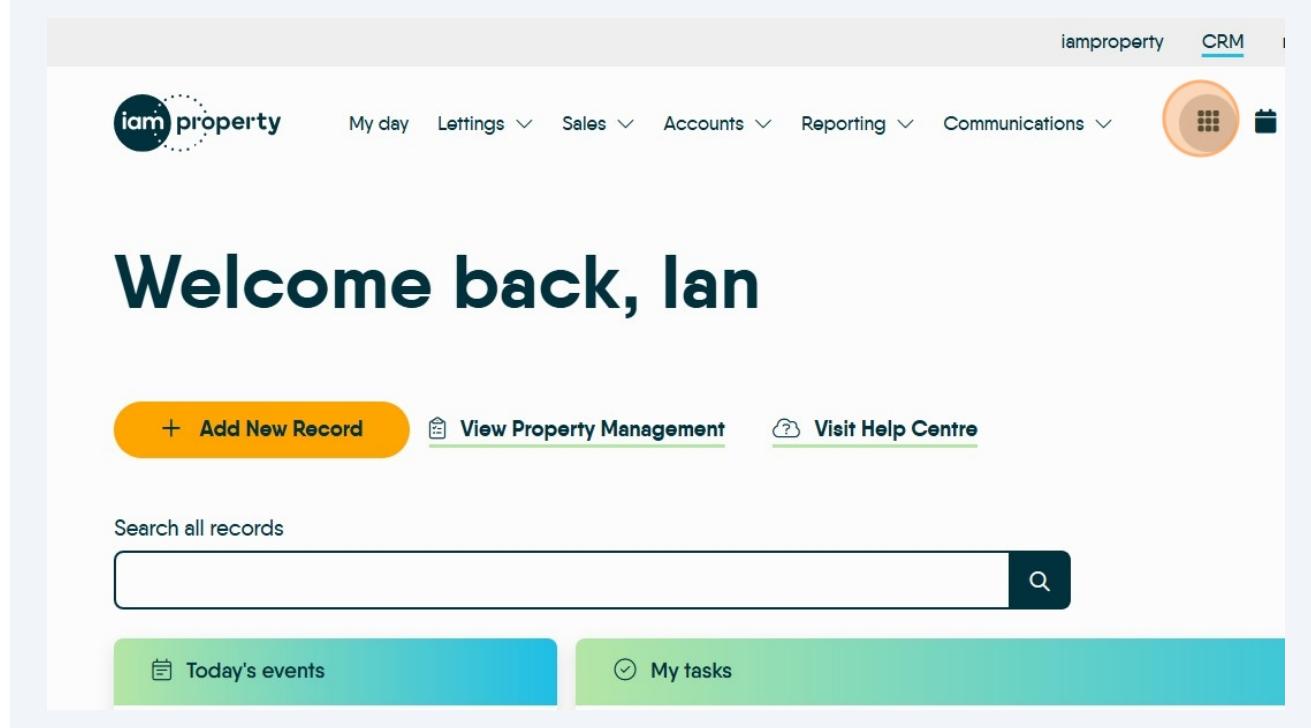


This guide provides a step-by-step process for adding a new landlord record in the CRM system, ensuring users can efficiently manage client information. It emphasises best practices, such as merging records to avoid duplication and creating necessary fields like salutation for personalised communication.

By following this guide, users can streamline their data entry processes and enhance their interactions with landlords, ultimately improving their property management efficiency.

- 1 Navigate to <https://crm.iampoperty.com/MyDay>

- 2 Click the "Bento" menu, or Add New Record.



- 3 Click "Add new record"
Click "Landlord"

My day Lettings Sales Accounts Reporting Communications



me back, Ian

[View Property Management](#)
[Visit Help Centre](#)

Active branches

Calendar

+ Add new record

Calls

Contacts

Events

Notes

Tasks


[My tasks](#)

Welcome

[+ Add New](#)
[Search all records](#)
[Today's events](#)
[You have](#)
[Sales Applicant](#)

[Lettings Applicant](#)

[Sales Property](#)

[Lettings Property](#)

[Landlord](#)

[Portfolio](#)

[Vendor](#)

[Tenancy](#)

[Contractor](#)

[Maintenance job](#)


Tip! From the next screens complete all the fields that you have information for.

The minimum to add is a SURNAME and EMAIL address.

If you use an email that has been used before then a warning message will show and there will be an option to use the original record (for example the user is an existing Landlord) or Merge the 2 records (for example if the prospect is already a Vendor/Applicant etc)



If your agency has 'Core Process Simplification' features set up on your account you will see a different screen at this point

Personal Details

4

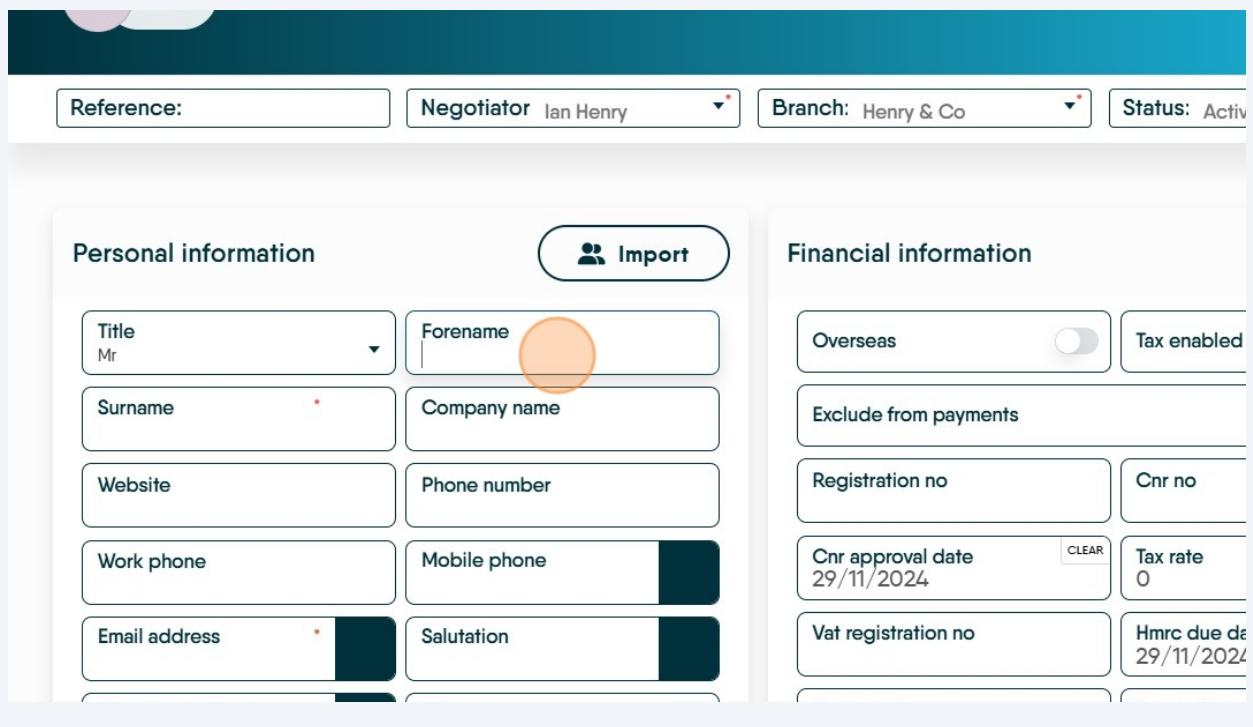
Click "Title" to add the title from the drop down menu. This menu can be updated in configuration and new items added.

The screenshot shows a user interface for entering personal details. On the left, a dropdown menu for 'Title' is open, showing options like 'Mr', 'Miss', 'Mrs', 'Ms', and 'Mr & Mrs'. The 'Mr & Mrs' option is highlighted with an orange circle. To the right of the dropdown are fields for 'Forename' and 'Surname'. Below these are fields for 'Website', 'Work phone', 'Email address', 'Phone number', 'Mobile phone', 'Salutation', and 'Import' (a button with a person icon). At the top right, there are status indicators for 'Negotiator Ian Henry', 'Branch: Henry & Co', and 'Status: Active'. On the right side, there is a 'Financial information' section with fields for 'Overseas' (with a toggle switch), 'Tax enabled', 'Exclude from payments', 'Registration no', 'Cnr no', 'Cnr approval date' (set to 29/11/2024), 'Tax rate' (set to 0), 'Vat registration no', and 'Hmrc due date' (set to 29/11/2024).



Alert! If you have a 'Mr and Mrs' Landlord record, you have the option to create 1 record. However, it is Best Practice and to make the use of movebutler (or any other area of CRM) easier, you should create 2 records, a Mr. and a separate Mrs.

5 Click the "Forename" field and add the clients first name.



Reference: Negotiator Ian Henry Branch: Henry & Co Status: Active

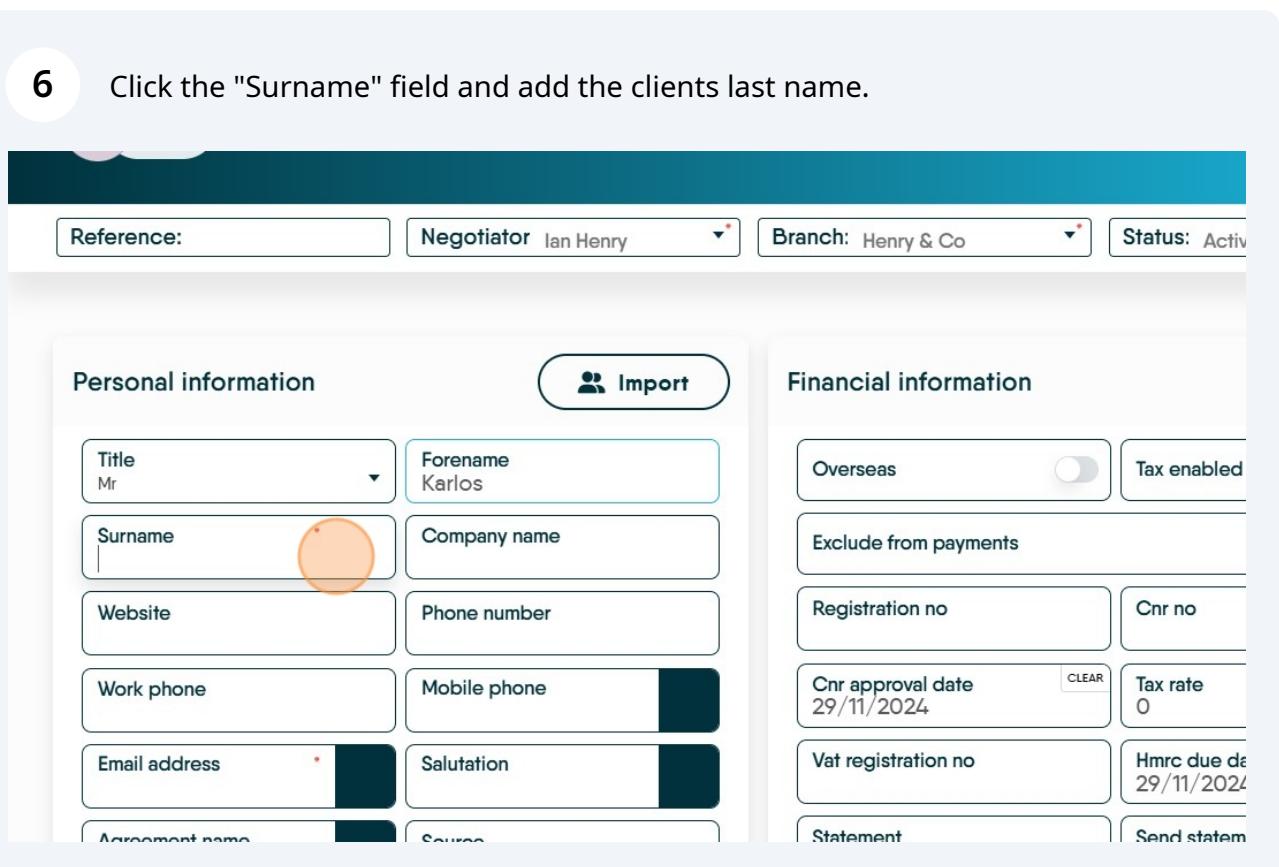
Personal information

Title Mr	Forename <input type="text"/>
Surname <input type="text"/>	Company name <input type="text"/>
Website <input type="text"/>	Phone number <input type="text"/>
Work phone <input type="text"/>	Mobile phone <input type="text"/>
Email address <input type="text"/>	Salutation <input type="text"/>

Financial information

Overseas <input type="checkbox"/>	Tax enabled <input type="checkbox"/>
Exclude from payments <input type="checkbox"/>	
Registration no <input type="text"/>	Cnr no <input type="text"/>
Cnr approval date 29/11/2024 <input type="text"/>	Tax rate 0 <input type="text"/>
Vat registration no <input type="text"/>	Hmrc due date 29/11/2024 <input type="text"/>

6 Click the "Surname" field and add the clients last name.



Reference: Negotiator Ian Henry Branch: Henry & Co Status: Active

Personal information

Title Mr	Forename Karlos <input type="text"/>
Surname <input type="text"/>	Company name <input type="text"/>
Website <input type="text"/>	Phone number <input type="text"/>
Work phone <input type="text"/>	Mobile phone <input type="text"/>
Email address <input type="text"/>	Salutation <input type="text"/>
Agreement name <input type="text"/>	Source <input type="text"/>

Financial information

Overseas <input type="checkbox"/>	Tax enabled <input type="checkbox"/>
Exclude from payments <input type="checkbox"/>	
Registration no <input type="text"/>	Cnr no <input type="text"/>
Cnr approval date 29/11/2024 <input type="text"/>	Tax rate 0 <input type="text"/>
Vat registration no <input type="text"/>	Hmrc due date 29/11/2024 <input type="text"/>
Statement <input type="text"/>	Send statement <input type="checkbox"/>

7

Click the "Mobile phone" field and add the clients mobile number.

N.B. If the client does not have a landline number, best practice within the CRM is to copy the mobile number to the Phone Number field as well as mobile number

Reference:

Negotiator: Ian Henry

Branch: Henry & Co

Status: Active

Personal information

Title: Mr	Forename: Karlos
Surname: Fandango	Company name: <input type="text"/>
Website: <input type="text"/>	Phone number: <input type="text"/>
Work phone: <input type="text"/>	Mobile phone: <input style="outline: 2px solid red; border-radius: 10px; width: 100%; height: 100%;" type="text"/>
Email address: <input type="text"/>	Salutation: <input type="text"/>
Agreement name: <input type="text"/>	Source: <input type="text"/>

Financial information

Overseas: <input type="checkbox"/>	Tax enabled: <input type="checkbox"/>
Exclude from payments: <input type="checkbox"/>	
Registration no: <input type="text"/>	Cnr no: <input type="text"/>
Cnr approval date: 29/11/2024 <input type="button" value="CLEAR"/>	Tax rate: 0 <input type="text"/>
Vat registration no: <input type="text"/>	Hmrc due date: 29/11/2024 <input type="text"/>
Statement: <input type="text"/>	Send statement: <input type="text"/>

8 Click the "Email Address" field.

If the email address has been used previously in the CRM (e.g. a Vendor), then you will be given the option to 'merge/use' the 2 records to save on data entry.

Personal information

 Import

Title Mr	Forename Karlos
Surname Fandango	Company name
Website	Phone number
Work phone	Mobile phone 07462 251489
Email address	Salutation
Agreement name	Source
Letting reason	

Financial information

Overseas	<input type="checkbox"/>
Tax enabled	
Exclude from payments	
Registration no	Cnr no
Cnr approval date 29/11/2024	<input type="button" value="CLEAR"/> Tax rate 0
Vat registration no	Hmrc due date 29/11/2024
Statement No Statement	Send statement Email
Safe deposits type Registered	Safe deposit

9 Click here to build the Salutation.

It is important to create this, there are email and letter merge tags for 'Salutation' and if the salutation is not created these areas will be left blank.

Personal information

Import

Title	Forename
Mr	Karlos
Surname	
Fandango	
Website	
Phone number	
Work phone	Mobile phone 07462 251489
Email address	Salutation
ian.henry+17@iamprope	
Agreement name	Source
Letting reason	

Financial information

Overseas	<input type="checkbox"/>
Tax enabled	
Exclude from payments	
Registration no	Cnr no
Cnr approval date 29/11/2024	<input type="button" value="CLEAR"/>
Tax rate 0	
Vat registration no	Hmrc due date 29/11/2024
Statement	Send statement via Email
Safe deposits type Registered	Safe deposits reg.

10 Click here to create an 'Agreement Name'. This text can be edited if required.

Personal information

Import

Title	Forename
Mr	Karlos
Surname	
Fandango	
Website	
Phone number	
Work phone	Mobile phone 07462 251489
Email address	Salutation
ian.henry+17@iamprope	
Agreement name	Source
Letting reason	

Financial information

Overseas	<input type="checkbox"/>
Tax enabled	
Exclude from payments	
Registration no	Cnr no
Cnr approval date 29/11/2024	<input type="button" value="CLEAR"/>
Tax rate 0	
Vat registration no	Hmrc due date 29/11/2024
Statement	Send statement via Email
Safe deposits type Registered	Safe deposits reg.

11

Click here to set the source of the record e.g. Rightmove, Advert, Friend Recommendation etc.

Personal information		Financial information	
Title Mr	Forename Karlos	Overseas	<input type="checkbox"/> Tax enabled
Surname Fandango	Company name	Exclude from payments	
Website	Phone number	Registration no	Cnr no
Work phone	Mobile phone 07462 251489	Cnr approval date 29/11/2024	<input type="checkbox"/> Tax rate 0
Email address ian.henry+17@iamprope	Salutation Mr Fandango	Vat registration no	Hmrc due date 29/11/2024
Agreement name Mr Karlos Fandango	Source	Statement No Statement	<input type="checkbox"/> Send statement via Email
Letting reason		Safe deposits type Registered	Safe deposits reg.

12

Click this text field and add a Letting reason, if required.

Personal information		Financial information	
Title Mr	Forename Karlos	Overseas	<input type="checkbox"/> Tax enabled
Surname Fandango	Company name	Exclude from payments	
Website	Phone number	Registration no	Cnr no
Work phone	Mobile phone 07462 251489	Cnr approval date 29/11/2024	<input type="checkbox"/> Tax rate 0
Email address ian.henry+17@iamprope	Salutation Mr Fandango	Vat registration no	Hmrc due date 29/11/2024
Agreement name Mr Karlos Fandango	Source Rightmove	Statement No Statement	<input type="checkbox"/> Send statement via Email
Letting reason		Safe deposits type Registered	Safe deposits reg.

Financial Information

13

Click here and note if the Landlord is an Overseas Landlord, this will cause this landlord to show in the Tax Ledger.

Click here. Tax Enabled will drive the CRM to retain the tax at the rate shown in the 'Tax Rate' box. If the Landlord has a CNR number, switch this option off.

Financial Information

Overseas	<input checked="" type="checkbox"/> Tax Enabled
Exclude From Payments	
Registration No	CNR No
CNR Approval Date 20/02/2025	Tax Rate 0.00
VAT Registration No	HMRC Due Date 20/02/2025
Statement No Statement	Send Statement Via Email

Personal Information

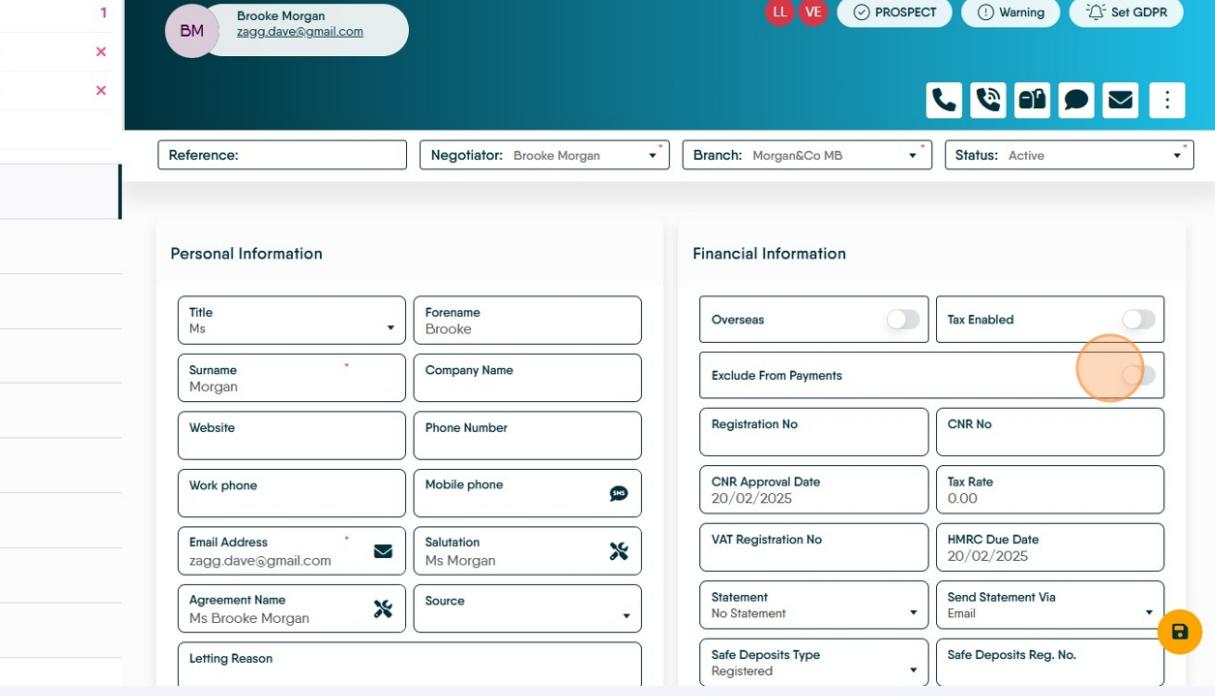
Title Ms	Forename Brooke
Surname Morgan	Company Name
Website	Phone Number
Work phone	Mobile phone
Email Address zagg.dave@gmail.com	Salutation Ms Morgan
Agreement Name Ms Brooke Morgan	Source
Letting Reason	

Financial Information

Overseas	<input type="checkbox"/> Tax Enabled
Exclude From Payments	
Registration No	CNR No
CNR Approval Date 20/02/2025	Tax Rate 0.00
VAT Registration No	HMRC Due Date 20/02/2025
Statement No Statement	Send Statement Via Email
Safe Deposits Type	Safe Deposits Reg. No.

14

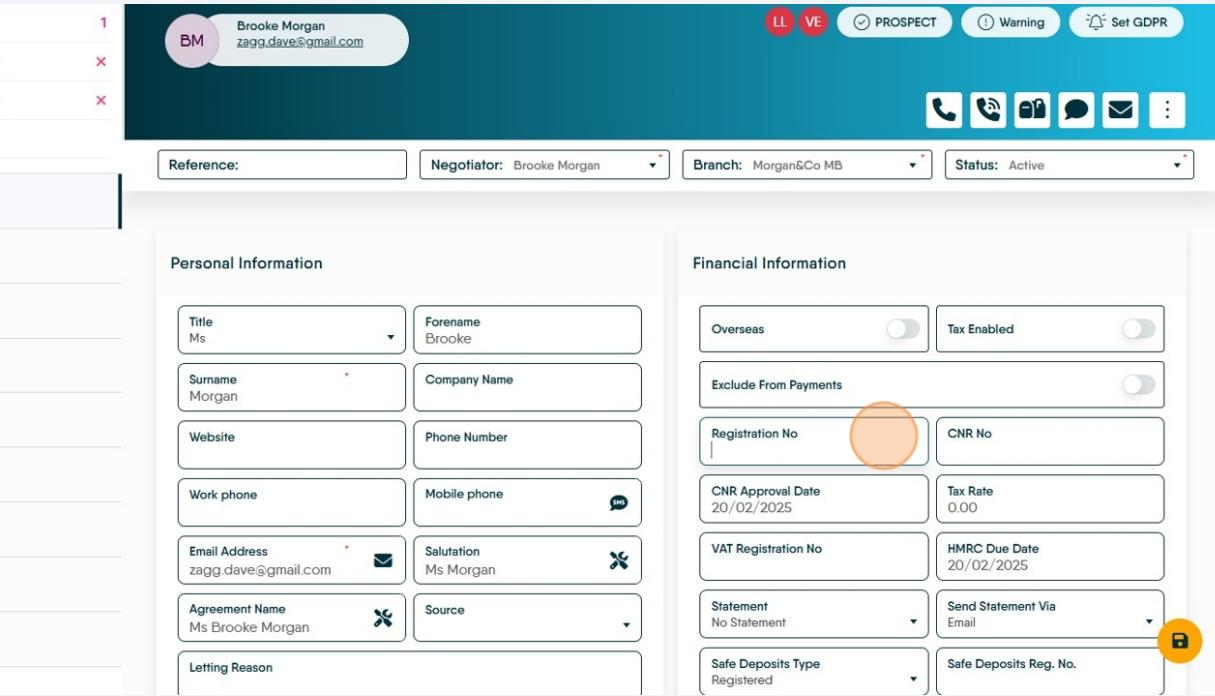
Enabling 'Exclude from payments' will stop the CRM from paying out to the landlord. If this option is enabled, then the Landlord payment will be withheld until the option is disabled. Management fees are still taken and paid to Agent.



The screenshot shows the CRM interface for a contact named Brooke Morgan. The 'Financial Information' section is displayed, containing fields for Overseas, Tax Enabled, and a large checkbox labeled 'Exclude From Payments'. This 'Exclude From Payments' checkbox is highlighted with a red circle, indicating it is the target for step 14.

15

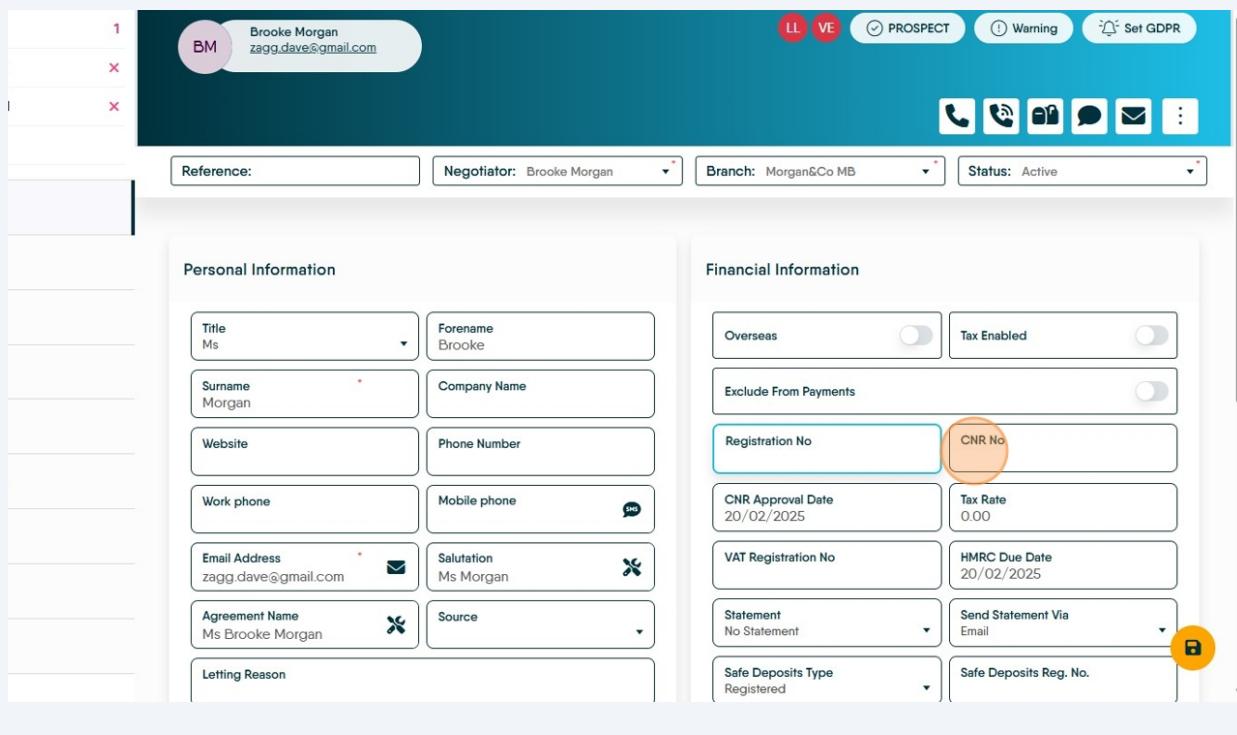
Click this text field.



The screenshot shows the CRM interface for the same contact, Brooke Morgan. The 'Financial Information' section is displayed, containing fields for Overseas, Tax Enabled, and 'Exclude From Payments'. Below these, there is a 'Registration No' field, which is highlighted with a red circle, indicating it is the target for step 15.

16

Click this text field and add the Landlords CNR Number, if this is added part way through a year then the Tax report will have 2 lines, one before the CNR added, one after.



Reference: Negotiator: Brooke Morgan Branch: Morgan&Co MB Status: Active

Personal Information

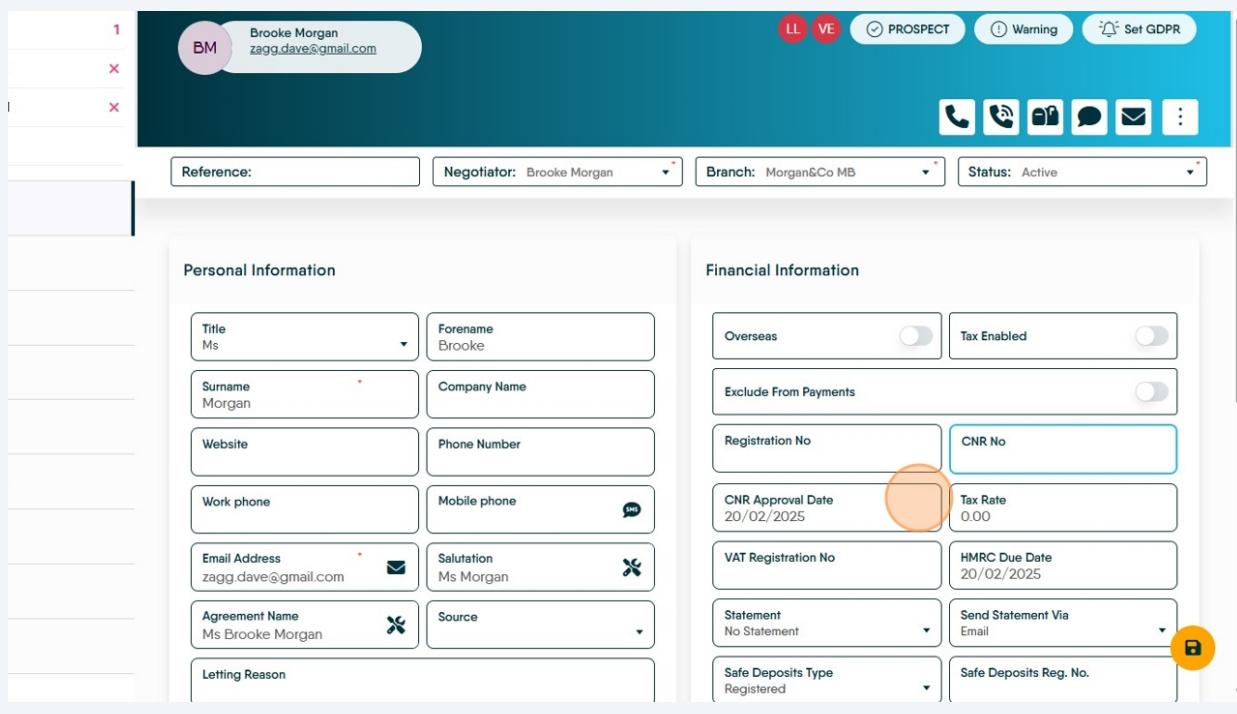
Title: Ms	Forename: Brooke
Surname: Morgan	Company Name
Website	Phone Number
Work phone	Mobile phone 
Email Address: zagg.dave@gmail.com 	Salutation: Ms Morgan 
Agreement Name: Ms Brooke Morgan 	Source <input type="button" value="▼"/>
Letting Reason	

Financial Information

Overseas <input type="checkbox"/>	Tax Enabled <input type="checkbox"/>
Exclude From Payments <input type="checkbox"/>	
Registration No <input type="text"/>	CNR No <input style="outline: 2px solid red; border-radius: 10px; border: 1px solid red;" type="text"/>
CNR Approval Date 20/02/2025	Tax Rate 0.00
VAT Registration No	HMRC Due Date 20/02/2025
Statement No Statement	Send Statement Via Email <input type="button" value="▼"/>
Safe Deposits Type Registered	Safe Deposits Reg. No. 

17

Click "CNR Approval Date" add the approval date here.



Reference: Negotiator: Brooke Morgan Branch: Morgan&Co MB Status: Active

Personal Information

Title: Ms	Forename: Brooke
Surname: Morgan	Company Name
Website	Phone Number
Work phone	Mobile phone 
Email Address: zagg.dave@gmail.com 	Salutation: Ms Morgan 
Agreement Name: Ms Brooke Morgan 	Source <input type="button" value="▼"/>
Letting Reason	

Financial Information

Overseas <input type="checkbox"/>	Tax Enabled <input type="checkbox"/>
Exclude From Payments <input type="checkbox"/>	
Registration No <input type="text"/>	CNR No <input type="text"/>
CNR Approval Date 20/02/2025	Tax Rate 0.00
VAT Registration No	HMRC Due Date 20/02/2025
Statement No Statement	Send Statement Via Email <input type="button" value="▼"/>
Safe Deposits Type Registered	Safe Deposits Reg. No. 

18

Add the Tax Rate for the Landlord here, if the Landlord has a CNR number make this rate 0.

Personal Information

Financial Information

Overseas Tax Enabled

Exclude From Payments

Registration No _____ CNR No _____

CNR Approval Date 20/02/2025 Tax Rate 0.00

VAT Registration No _____ HMRC Due Date 20/02/2025

Statement No Statement Send Statement Via Email

Safe Deposits Type Registered Safe Deposits Reg. No. _____

19

Add the VAT Registration number here if required and the date the VAT is due.

Personal Information

Financial Information

Overseas Tax Enabled

Exclude From Payments

Registration No _____ CNR No _____

CNR Approval Date 20/02/2025 Tax Rate 0.00

VAT Registration No _____ HMRC Due Date 20/02/2025

Statement No Statement Send Statement Via Email

Safe Deposits Type Registered Safe Deposits Reg. No. _____

20

Click into the Statement menu and select the statement type the Landlord requires.

The screenshot shows the Rightmove landlord portal. On the left, there are input fields for 'Mobile phone' (07462 251489), 'Salutation' (Mr Fandango), and 'Source' (Rightmove). Below these is a large empty text area. In the center, there are several input fields: 'Cnr approval date' (29/11/2024), 'Tax rate' (0), 'Vat registration no', 'Hmrc due date' (29/11/2024), and 'Statement'. The 'Statement' field is a dropdown menu with the following options: 'No Statement', 'Landlord Statement' (which is highlighted with an orange circle), 'Consolidated Statement', 'Grouped Consolidated Statement', 'Portfolio Statement', and 'Advanced Landlord'. On the right, there is a 'Send statement via' dropdown menu with 'Email' selected, and a 'Safe deposits reg. no.' input field. At the bottom right are two buttons: a dark blue one with a white icon and an orange one with a white icon.

21

Click into the 'Send Statements Via' to set the landlords preference of how to send their statement.

The screenshot shows the Rightmove landlord portal. On the left, there are input fields for 'Phone number', 'Mobile phone' (07462 251489), 'Salutation' (Mr Fandango), and 'Source' (Rightmove). Below these is a large empty text area. In the center, there are several input fields: 'Registration no', 'Cnr no', 'Cnr approval date' (29/11/2024), 'Tax rate' (0), 'Vat registration no', 'Hmrc due date' (29/11/2024), 'Statement' (Landlord Statement), and 'Safe deposits type' (Registered). To the right of these fields is a 'Send statement via' dropdown menu with 'Email' selected, and a 'Financial notes' section below it. At the bottom right are two buttons: a dark blue one with a white icon and an orange one with a white icon. A small 'B I U' icon is also visible.

22

Click here to set the 'Safe deposits type' pick from the drop down menu and add the Safe Deposits Reg No. into the the relevant box.

	Phone number	
	Mobile phone 07462 251489	
*	Salutation Mr Fandango	
	Source Rightmove	
nt		
	Registration no	Cnr no
	Cnr approval date 29/11/2024	<input type="button" value="CLEAR"/>
	Tax rate 0	
	Vat registration no	Hmrc due date 29/11/2024
	Statement Landlord Statement	Send statement via Email
	Safe deposits type Registered	Safe deposits reg. no.

Edit address

	Postcode	

Financial notes

B	I	U	£
Enter notes here...			
			

23

Click here and add in the address for the Landlord. There are 3 options, Contact, Correspondence and Official. There can only be 1 address set in total.

Type the postcode into the Postcode field and click the search icon, select the address from the menu, use 'Edit Address' to edit if required.

The screenshot shows the ijam property software interface. At the top, there are navigation tabs: My day, LETTINGS, Sales, Accounts, Reporting, Communications, and a grid icon. Below the tabs, there are search fields for 'Letting reason' (set to 'New rental investment') and 'Safe deposits type' (set to 'Not Registered').

Address Section: Contains fields for 'Address type' (set to 'Contact') and 'Postcode'. The 'Postcode' field is highlighted with a yellow circle. An 'Edit address' button is located to the right. Below these are fields for 'Address' and 'Address 2'.

Financial notes Section: Contains a 'Financial notes' heading and a text area with icons for Balance (B), Income (I), Util (U), and Expenses (E). A placeholder text 'Enter notes here...' is visible.

User defined fields: A section labeled 'User defined fields' is shown at the bottom.

24

Click "Checklist" and complete any checklists that have been set.

The screenshot shows the ijam property software interface. On the left, a sidebar menu includes 'Properties' (0), 'Identity Confirmed' (X), 'Address Confirmed' (X), 'Last Contacted', 'Details' (selected), 'Checklist' (highlighted with a yellow circle), 'Properties', 'Tenancies', 'Contacts', and 'Documents'.

The main panel displays personal information for 'Karlos Fandango' (ian.henry+17@jamproperty.com, 07462 251489). The address is listed as '25 Millet Way, Curbridge, Witney'. The 'Personal information' section includes fields for Title (Mr), Forename (Karlos), Surname (Fandango), Company name, Website, Phone number, Work phone, and Mobile phone (07462 251489).

25 Click here to add a note to the Checklist query.

To complete a checklist query, click here. The query will be struck through and the name of the person completing, plus date and time are added also.

The screenshot shows the iam property software interface. At the top, there are navigation links: iamproperty, CRM, movebutler, and iamsold. Below the header, a user profile for 'Karlos Fandango' is displayed, along with status indicators (LL, VE, Prospect, Warning) and a 'Set GDPR' button. The main content area shows a property record for '25 Millet Way, Curbridge, Witney'. Below the address, there are dropdown menus for 'Reference', 'Negotiator' (set to 'Ian Henry'), 'Branch' (set to 'Henry & Co'), and 'Status' (set to 'Active').

Add ons

Landlord Insurance Offered?

0 of 1 checked

Properties 1

Identity Confirmed X

Address Confirmed X

Last Contacted

Details

Checklist

Properties

Tenancies

Contacts

Documents

Journal

E-Sign

Audit

Brooke Morgan
zagg.dave@gmail.com

LL VE PROSPECT Warning

35 Kingsway, Darlington

Reference: Negotiator: Brooke Morgan Branch: Morgan&Co MB Status: Active

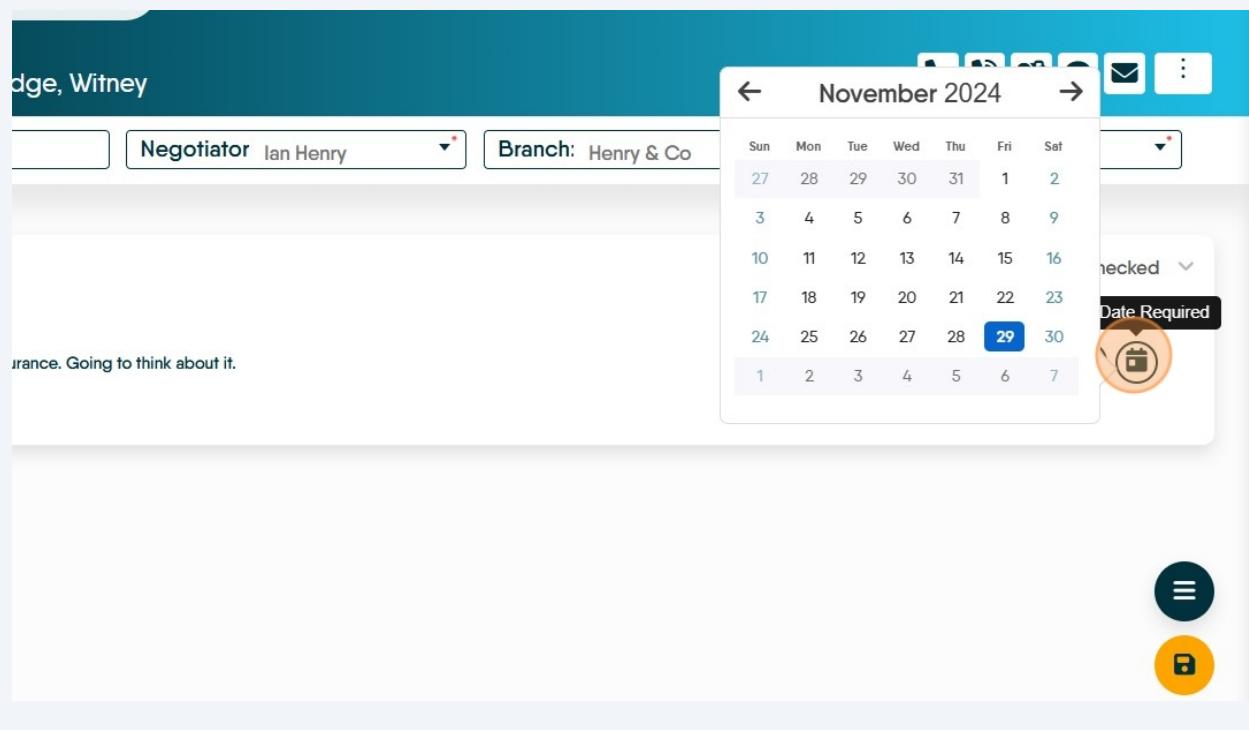
0 of 1 checked

Landlord Insurance Offered Checked by Training Dave on 24/02/2025 12:07

The screenshot illustrates a checklist query for 'Landlord Insurance Offered'. The checkbox is checked, and a note is added stating 'Checked by Training Dave on 24/02/2025 12:07'. The interface includes various navigation tabs like Properties, Tenancies, Contacts, etc., and a sidebar with icons for E-Sign and Audit.

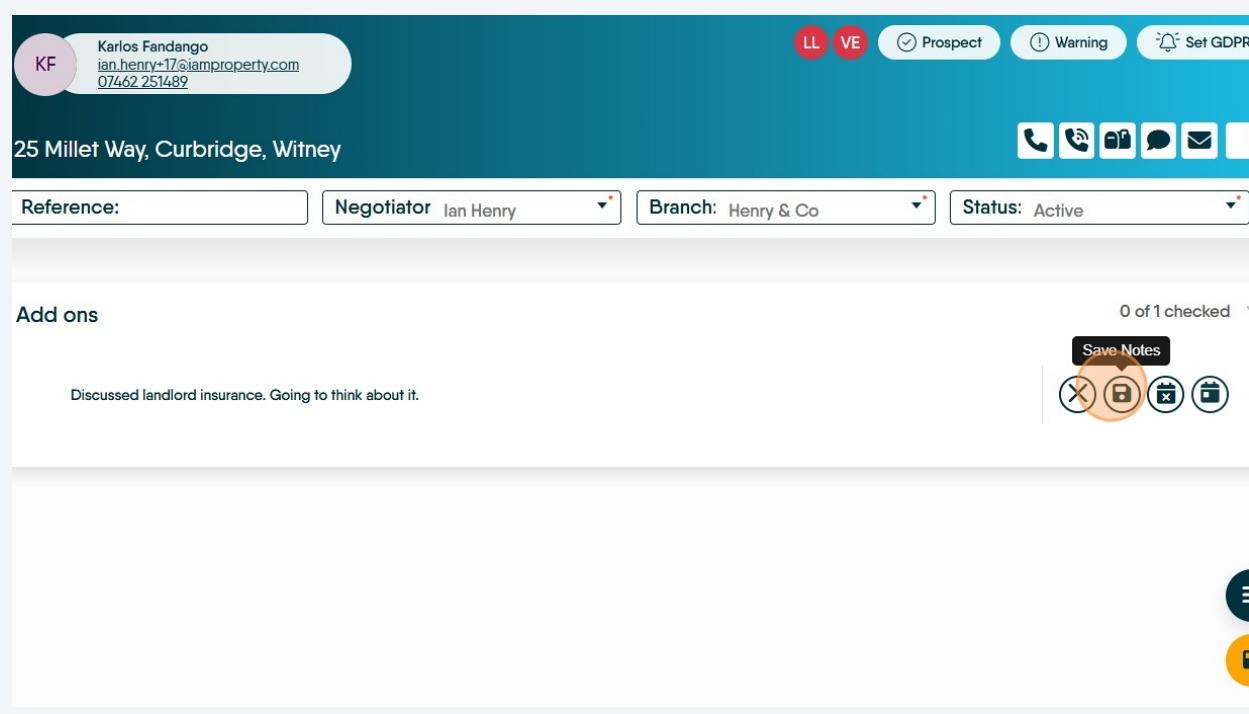
26

Click 'Date Required' to add a date that the task will be complete. This will then show in the Activity list as a reminder.

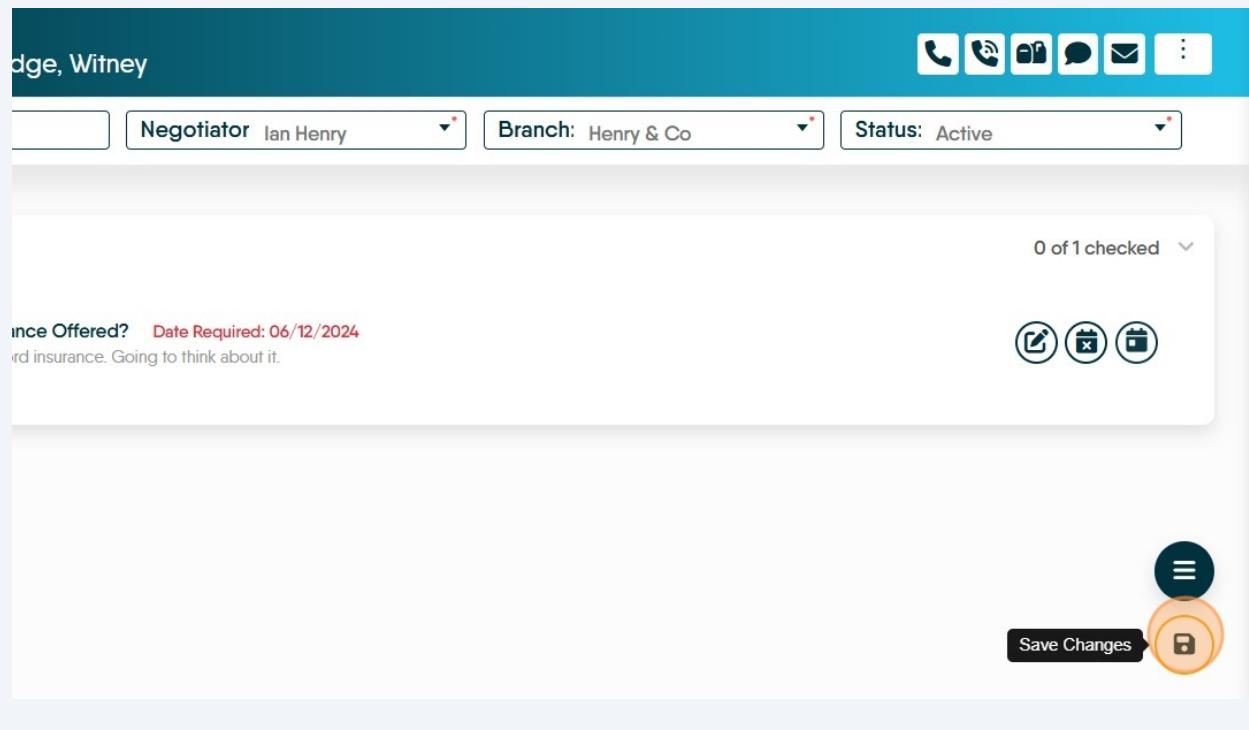


27

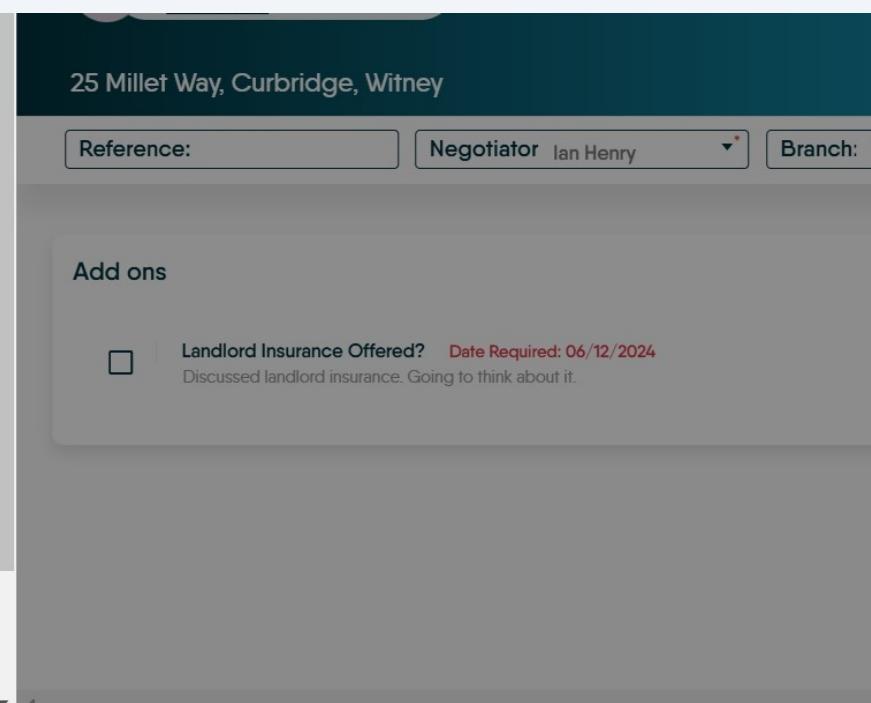
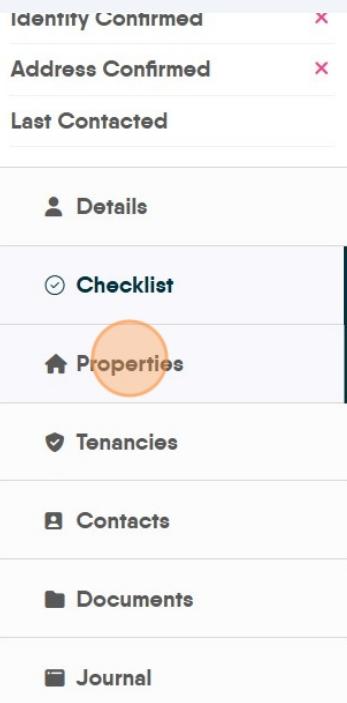
Click here to save the notes.



28 Click here to save.



29 Click "Properties" this screen will show all of the properties that are controlled by this landlord. It is also a good place to add a new property from.



Reference: Negotiator Ian Henry Branch: Henry & Co Status: Active

+ Add property

Sort Properties

Search

Clear filters

Property style Select Multiple Options

Minimum Bedrooms 00

No matching properties

Landlord Menu

30 Click "Tenancies" this will show all of the tenancies in the Landlords properties. Live, Pre Booked or Archived. will show here.

Address Confirmed

Last Contacted

Details

Checklist

Properties

Tenancies

Contacts

Documents

Journal

Reference: Negotiator Ian Henry Branch: Henry & Co

+ Add property

Sort Properties

Search

Clear filters

Property style Select Multiple Options

25 Millet Way, Curbridge, Witney

Reference: Negotiator Ian Henry Branch: Henry & Co Status: Active

+ Add tenancy

Sort Tenancies Search Clear filters

0 Tenancies

No matching tenancies

Status

Tenancy expired

31 Click "Contacts" to see all the Landlords Contacts.

Address Confirmed

Last Contacted

Details

Checklist

Properties

Tenancies

Contacts

Documents

Journal

25 Millet Way, Curbridge, Witney

Reference: Negotiator Ian Henry Branch:

+ Add tenancy

Sort Tenancies Search Clear filters

No matching tenancies

Status

Tenancy expired

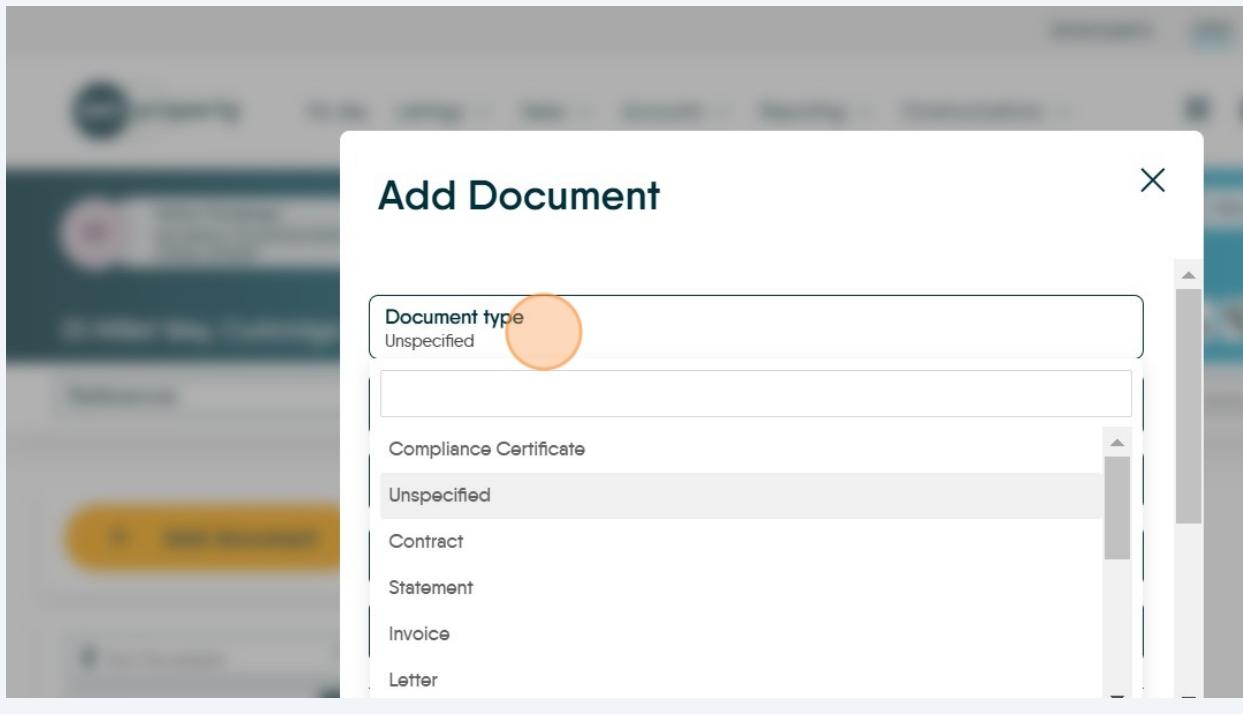
32 Click "Documents" to view or/and upload new documents to the record.

The screenshot shows a software interface with a sidebar on the left and a main contact record on the right. The sidebar has the following sections: Address Confirmed, Last Contacted, Details, Checklist, Properties, Tenancies, Contacts, **Documents** (which is highlighted with an orange circle), and Journal. The main contact record for '25 Millet Way, Curbridge, Witney' is displayed with fields for Reference (empty), Negotiator (Ian Henry), and Branch (empty). A 'New contact' button is visible. Below the contact record are filters for Sort Contacts, Search, and Clear filters.

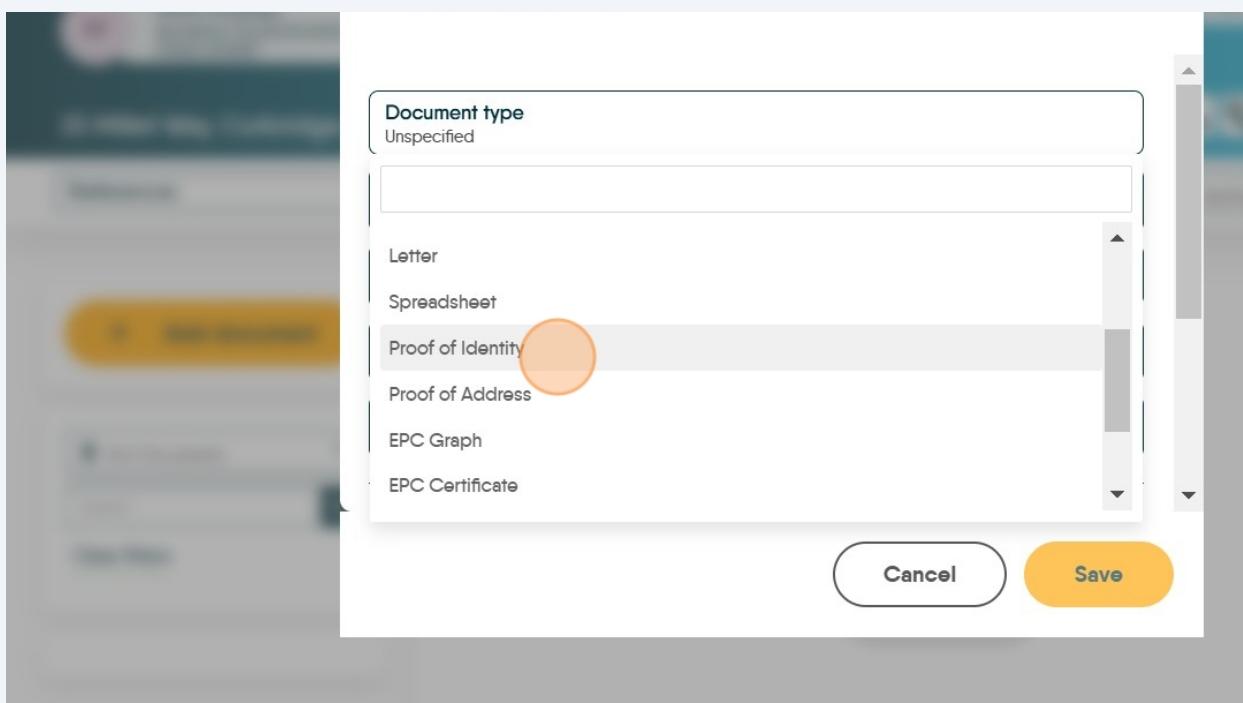
33 To upload a document. Click "Add Document"

The screenshot shows the 'Documents' section of the software. At the top, there is a user profile (KF), contact information (Karlos Fandango, ian.henry+17@iamproperty.com, 07462 251489), and status indicators (LL, VE, Prospect, War). The main area shows a contact record for '25 Millet Way, Curbridge, Witney' with fields for Reference (empty), Negotiator (Ian Henry), Branch (Henry & Co), and Status (Active). A 'New contact' button is visible. Below the contact record are filters for Sort Documents, Search, and Clear filters. The main content area displays a message: 'No documents available' with a 'Start' button and a note: 'Please click the button to add'.

34 Set the document type from the menu



35 If you add a 'Proof of Identity' or 'Proof of Address' the Proof of Identity/Address icons at the top of the Landlord screen will update to ticks.



Properties

1

Identity Confirmed



Address Confirmed



Last Contacted

36

Click the "File Name" field. Add a filename, it is not necessary to do this as the filename will be populated with the name of the file you use.

Add Document

Document type
Proof of Identity

File name



Expiry date

Password protected

Client logins



Upload Document



37

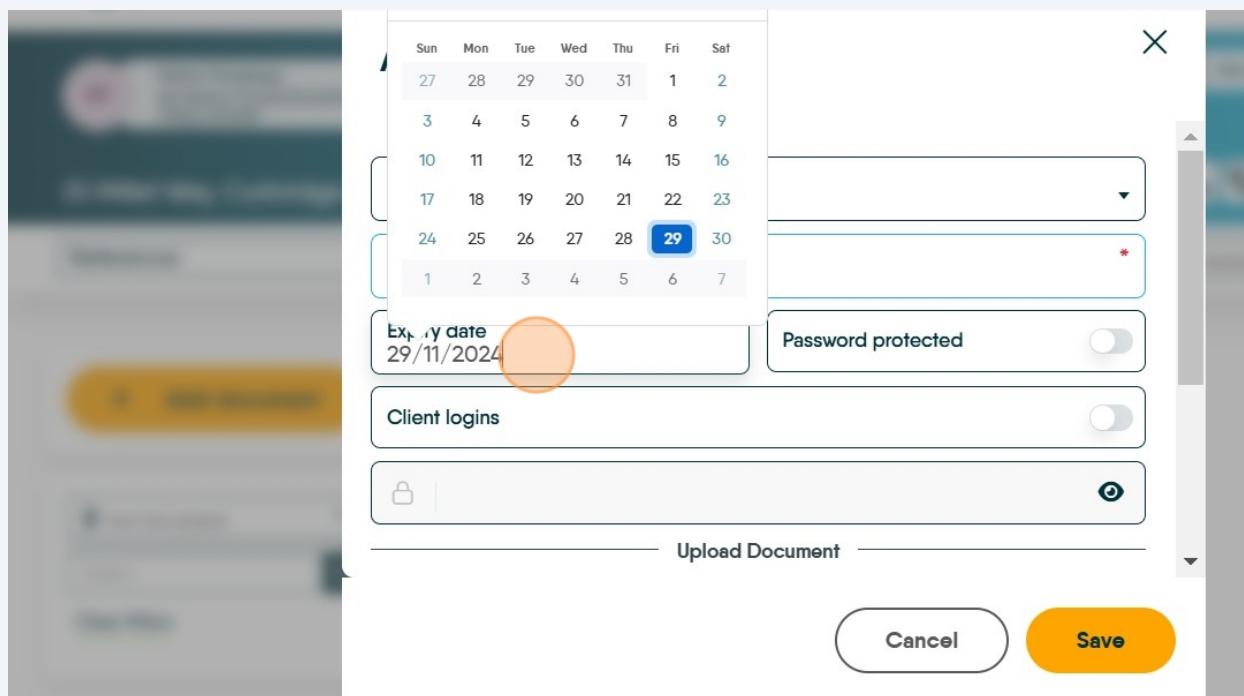
Click the "Expiry date" field.

This is optional and will enable you to be notified when the document expires e.g. Right to Rent document.

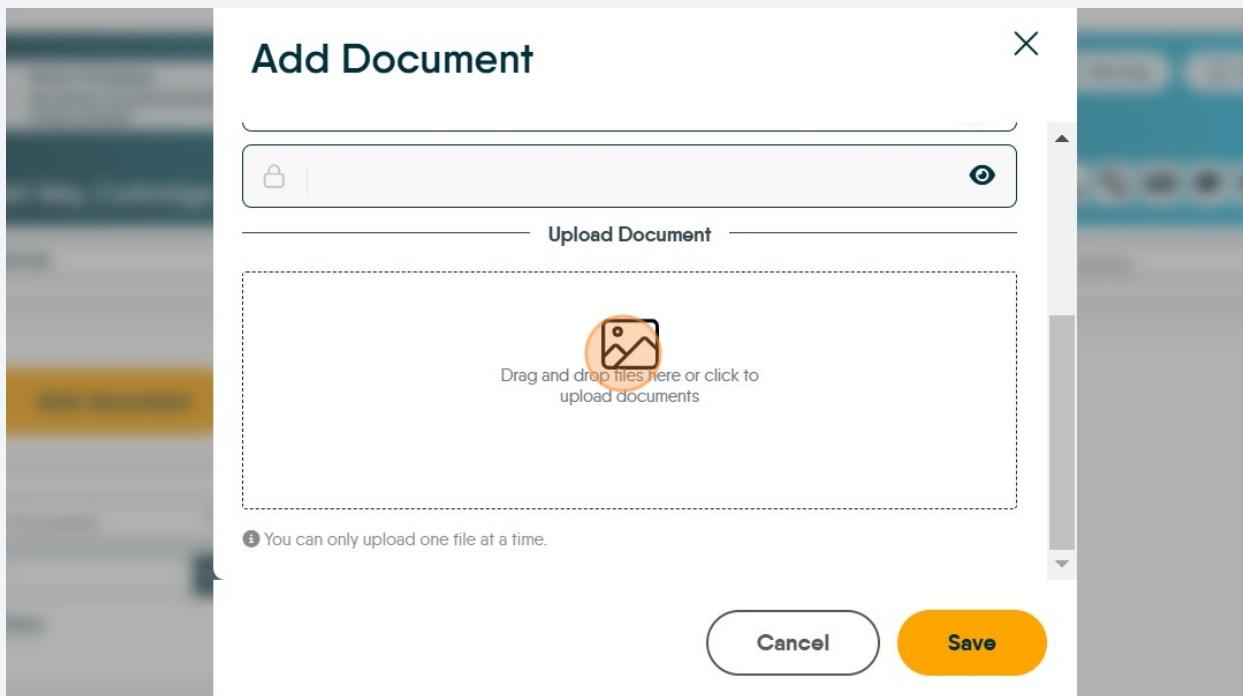
The other options on this screen are -

Password Protected; allows you to set a password to stop unauthorised access to the document.

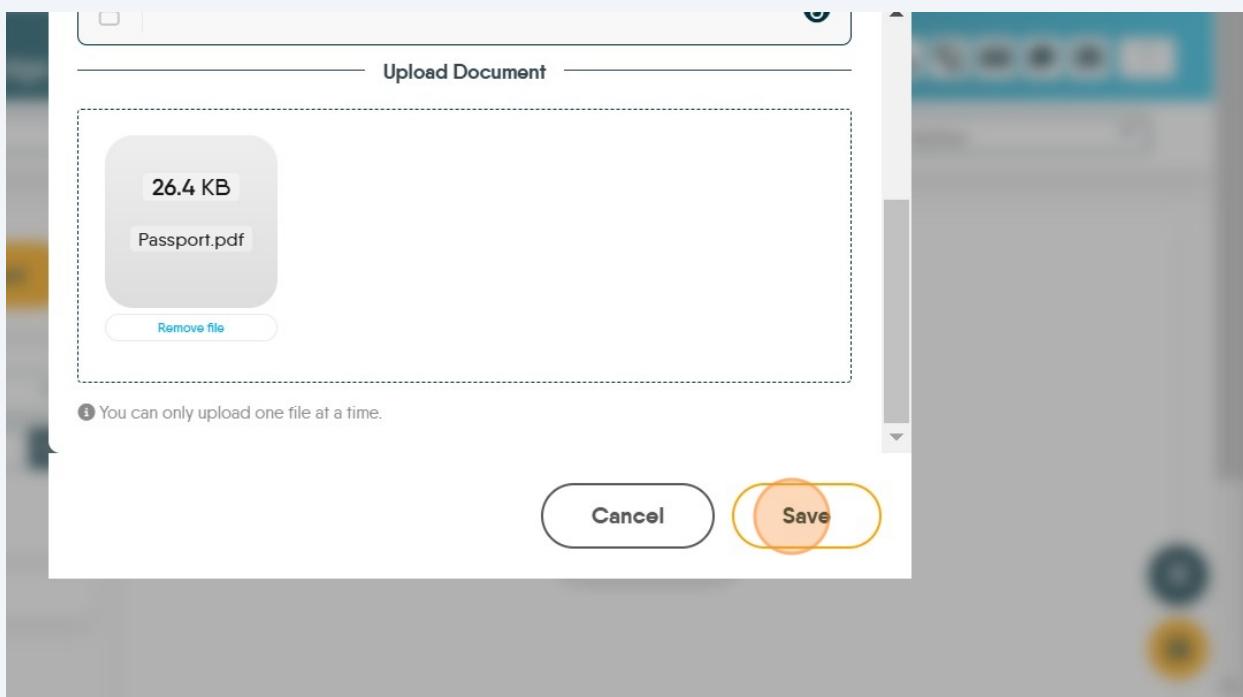
Client Logins; this enables the document to be viewed in the appropriate Client Portals (in this case Landlord portal).



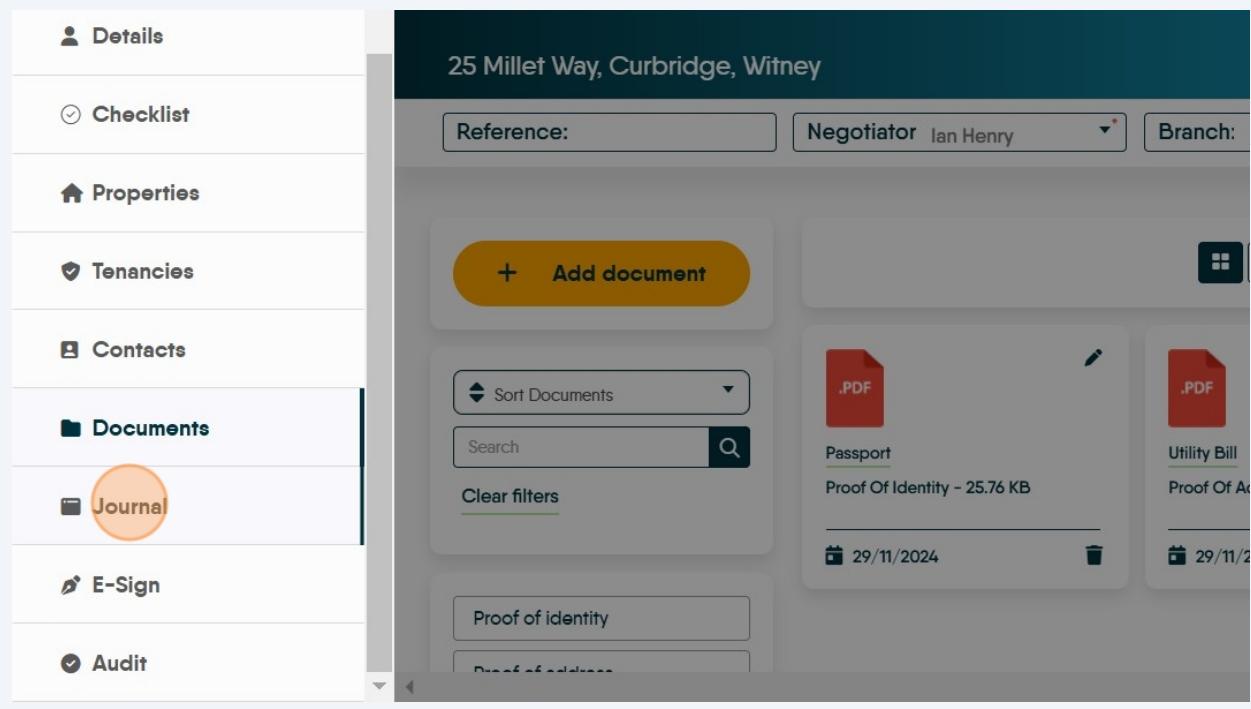
38 Click here to search for and select the document.



39 Click "Save"



40 Click "Journal"



The screenshot shows a software interface with a sidebar on the left and a main document view on the right. The sidebar has the following sections and items:

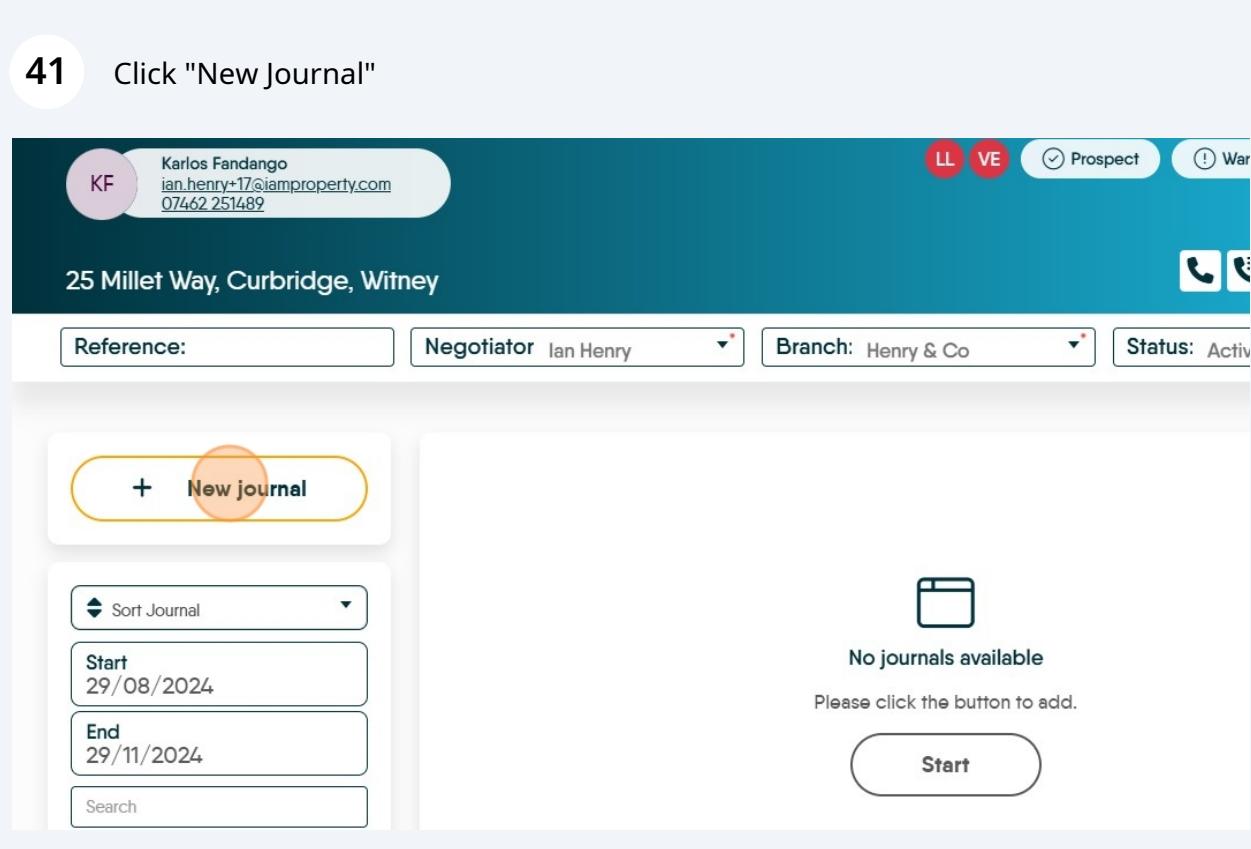
- Details**
- Checklist**
- Properties**
- Tenancies**
- Contacts**
- Documents**
- Journal** (This item is highlighted with an orange circle)
- E-Sign**
- Audit**

The main document view for the property "25 Millet Way, Curbridge, Witney" includes the following details:

- Reference: (empty)
- Negotiator: Ian Henry
- Branch: (empty)
- Add document** button
- Sort Documents dropdown
- Search bar
- Clear filters button
- Proof of identity section
- Two document entries:
 - Passport** (.PDF, Proof Of Identity - 25.76 KB, 29/11/2024)
 - Utility Bill** (.PDF, Proof Of A..., 29/11/2024)

Adding Journal Entries

41 Click "New Journal"



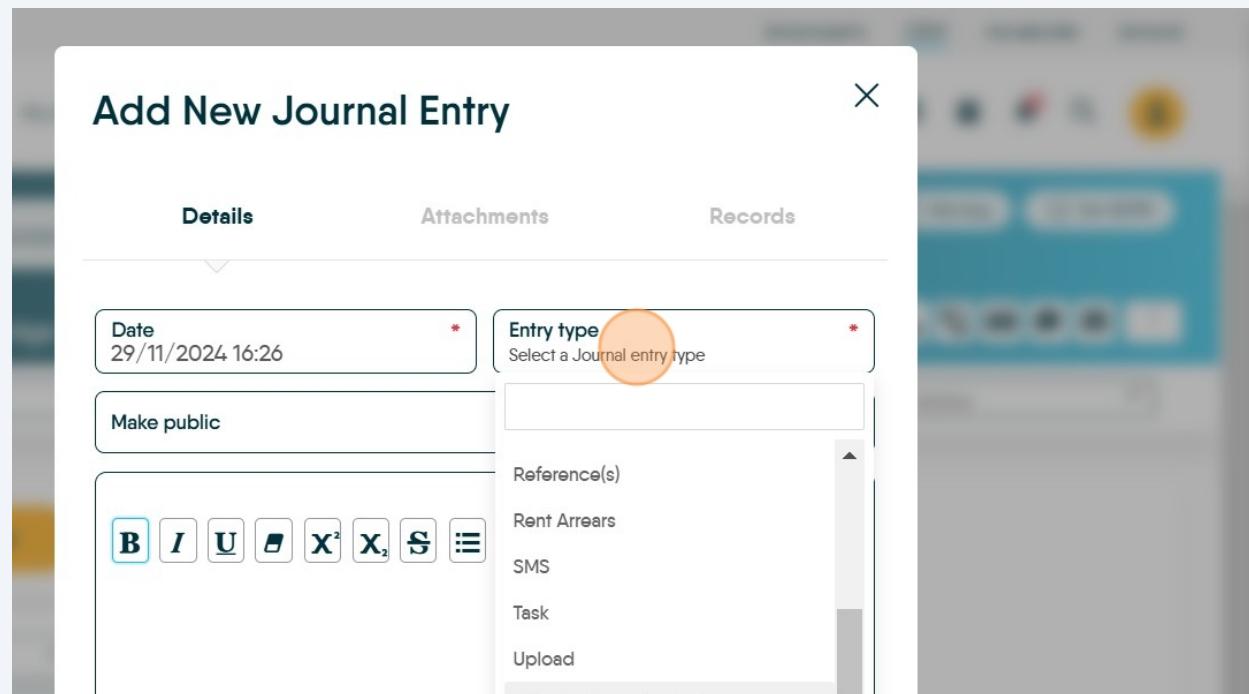
The screenshot shows a software interface with a header and a main content area. The header includes:

- User info: KF, Karlos Fandango, ian.henry+17@iamproperty.com, 07462 251489
- Status indicators: LL, VE, Prospect, War
- Property address: 25 Millet Way, Curbridge, Witney
- Phone icons

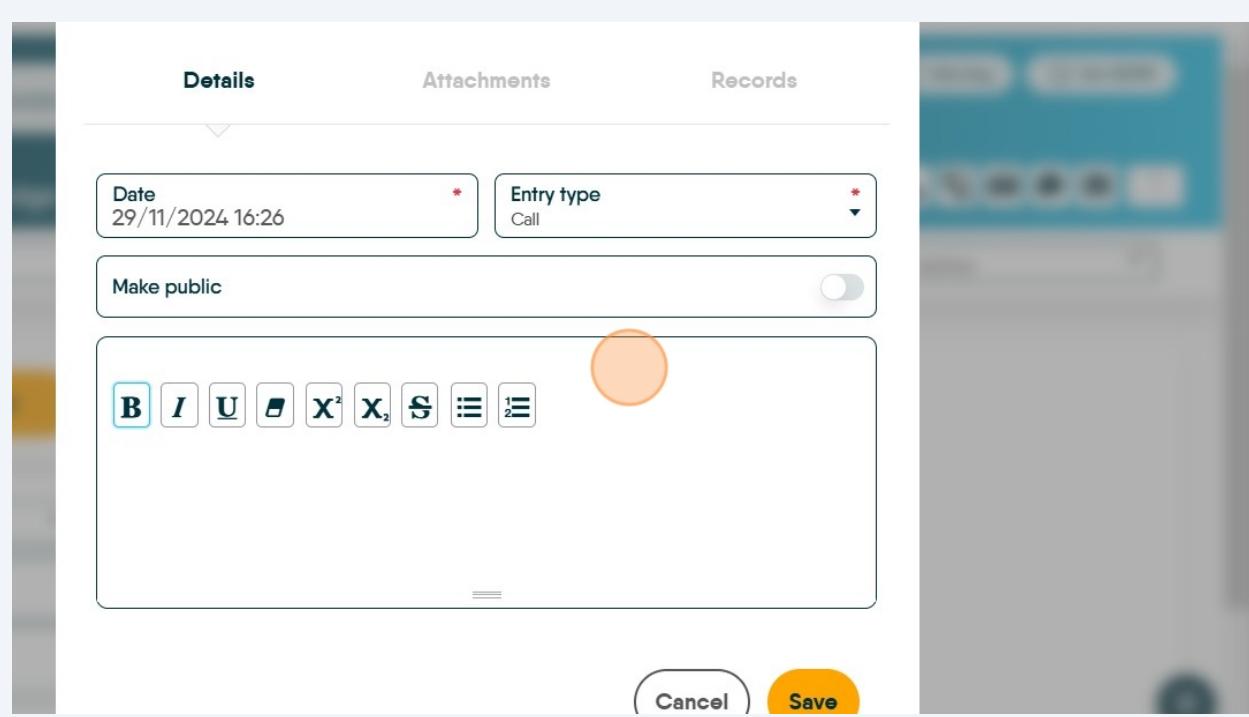
The main content area includes:

- Reference: (empty)
- Negotiator: Ian Henry
- Branch: Henry & Co
- Status: Active
- New journal** button (highlighted with an orange circle)
- Sort Journal dropdown
- Start date: 29/08/2024
- End date: 29/11/2024
- Search bar
- No journals available message: "No journals available. Please click the button to add." with a "Start" button

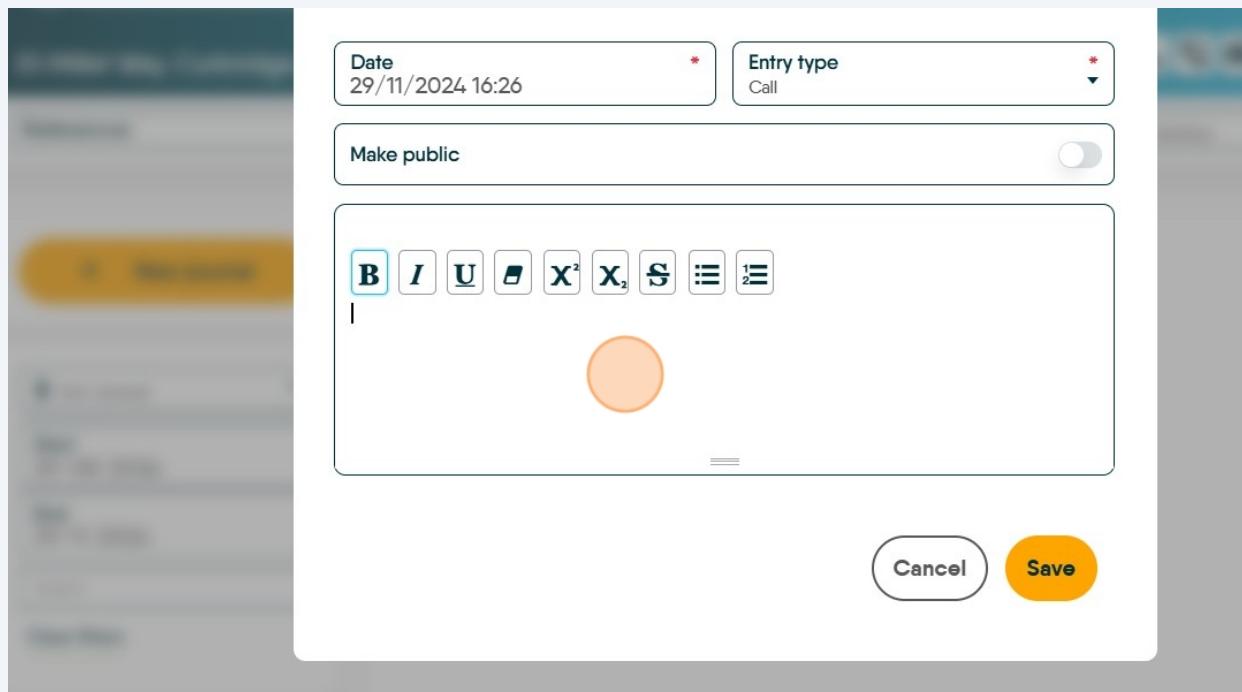
42 Click "Select a Journal entry type"



43 For example. Click "Call"

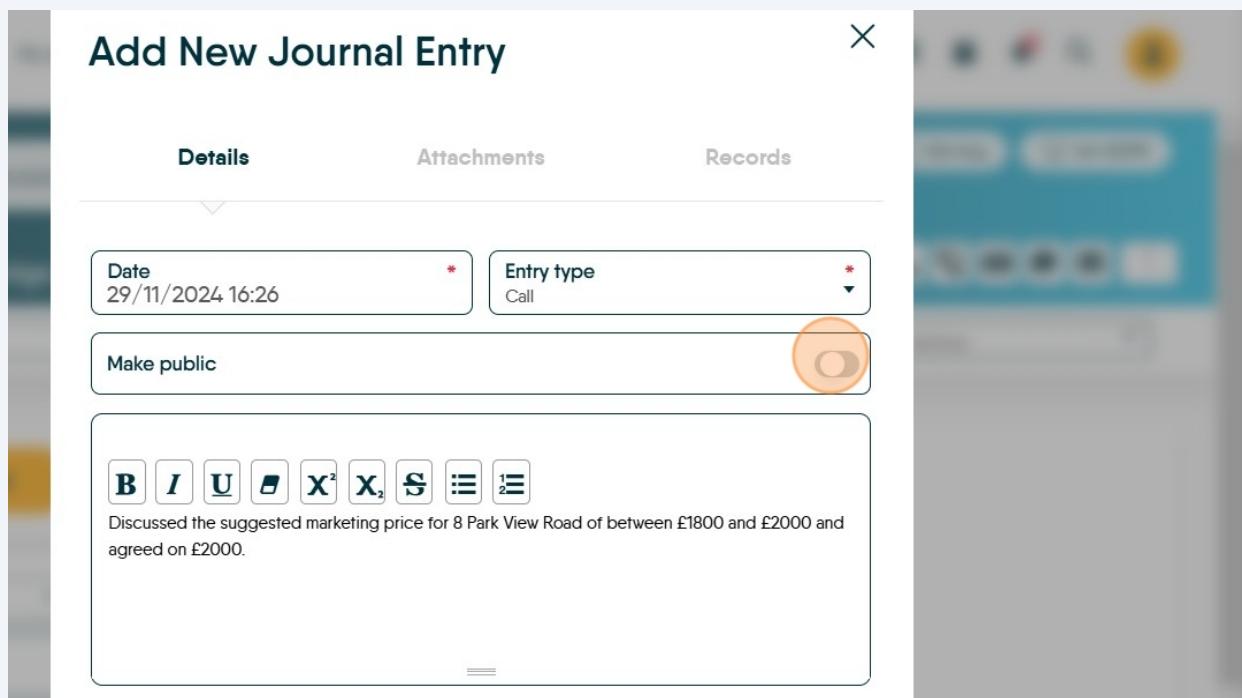


44 Click here and add the text of your Journal entry.



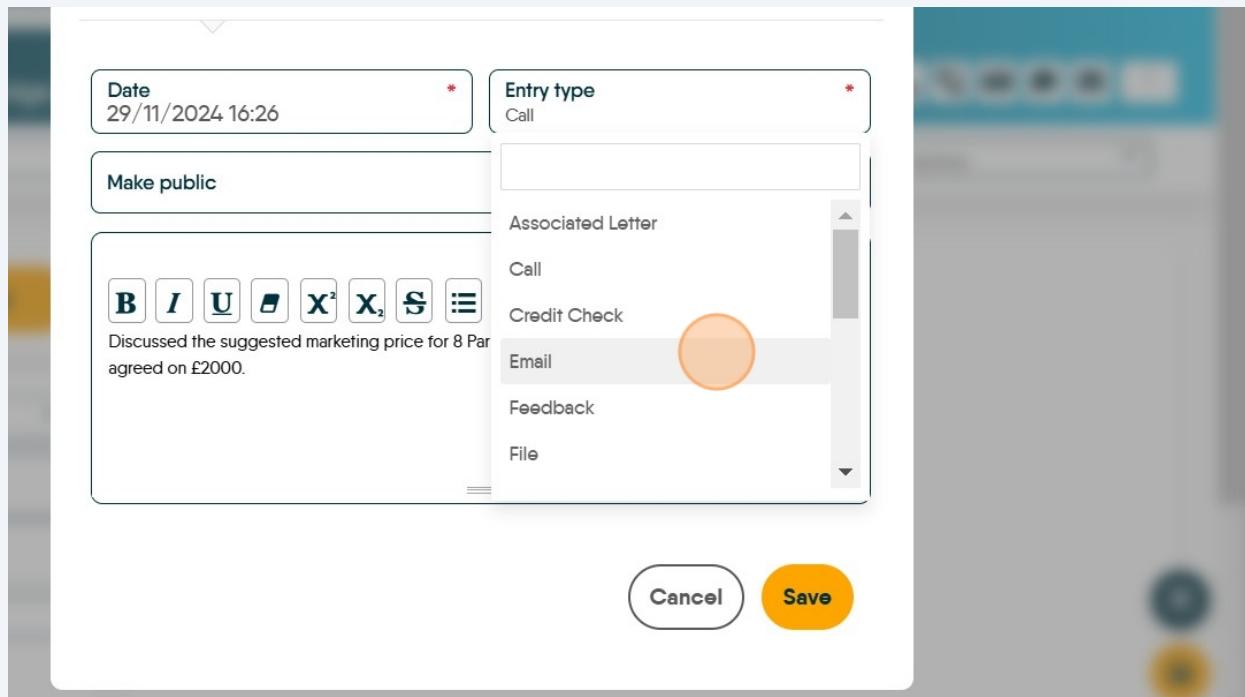
45 Be as descriptive as possible, click 'make public' to make the journal visible in Client Portals. Then click 'Save' if the journal entry is complete.

Add New Journal Entry



46 To add a copy of an email to a journal. Click "Email" in the entry type menu.

Add a description of your email in the first screen.



47 Click "ATTACHMENTS" and then drag the email from your email software (e.g. Outlook). If your journal entry is complete click 'Save'

Add New Journal Entry

Details **Attachments** **Records**

Date *****
29/11/2024 16:26

Entry type *****
Email

Make public

B **I** **U** **¶** **X²** **X₂** **S** **≡** **≡≡**

Discussed the suggested marketing price for 8 Park View Road of between £1800 and £2000 and agreed on £2000.

Add New Journal Entry

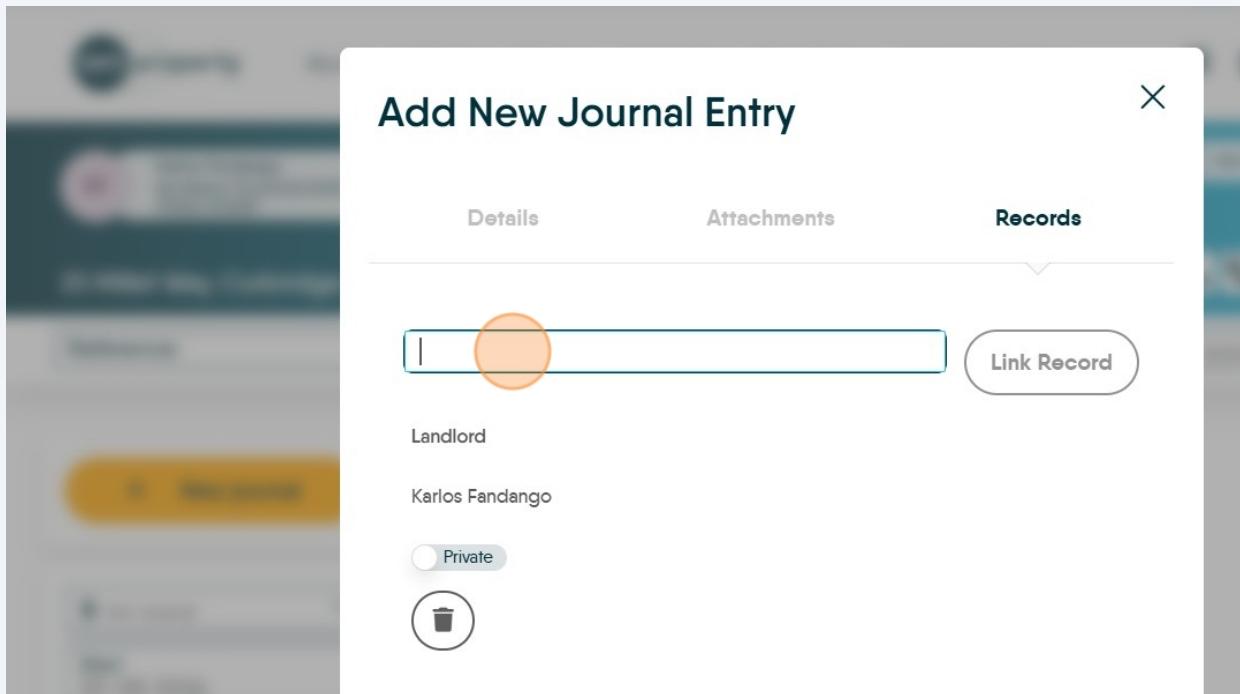
Details **Attachments** **Records**

Journals can have up to 2 attachments

74.2 KB
Calendar Eve...
[Remove file](#)

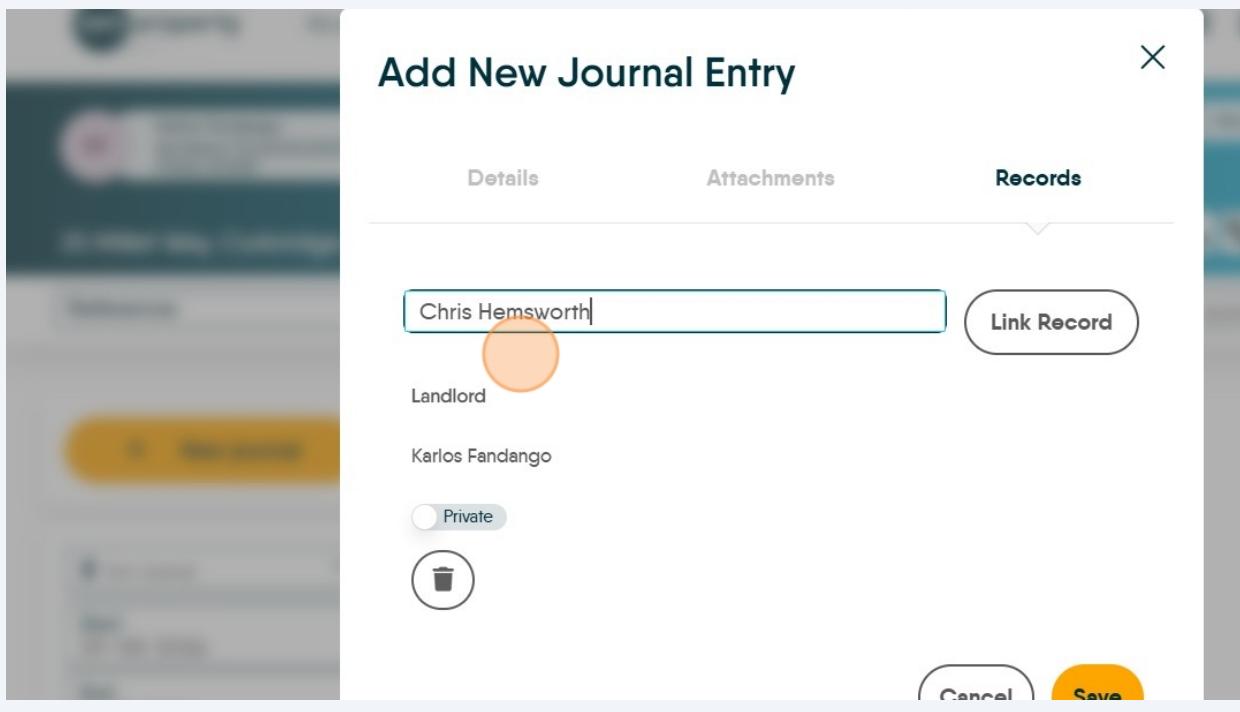
48

To link this Journal to another record in CRM, a property or another record. Click "RECORDS" Click this text field.

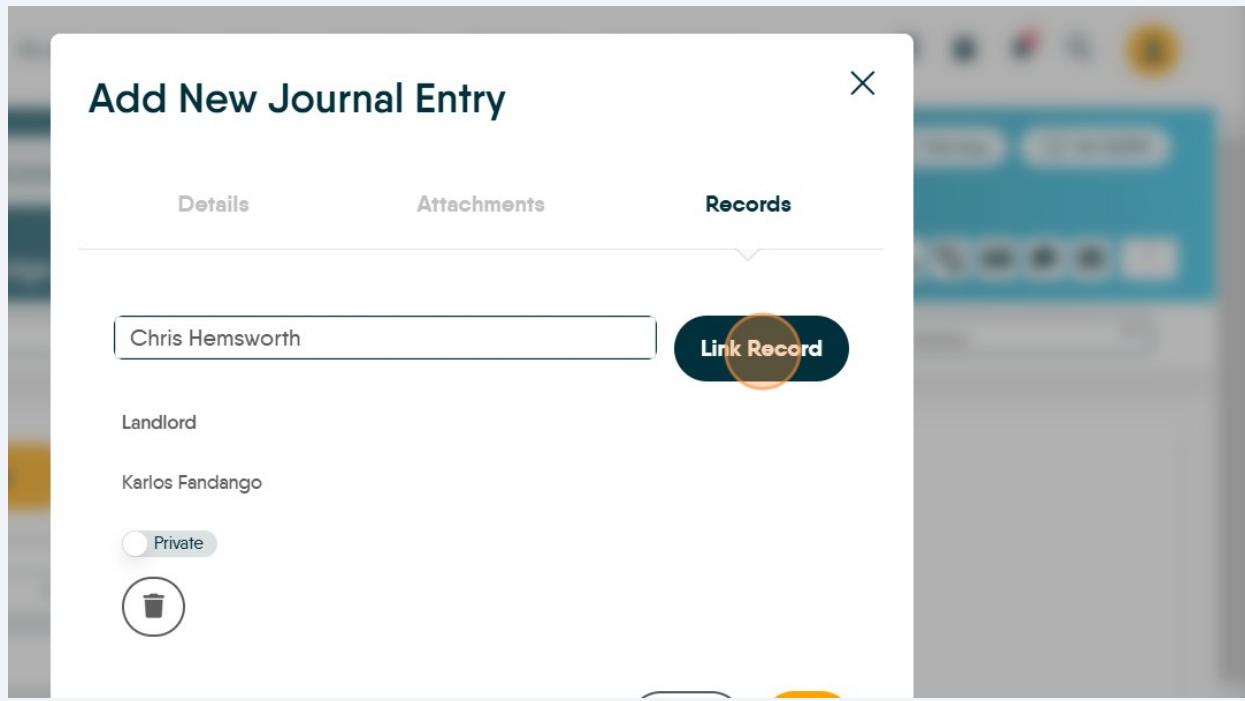


49

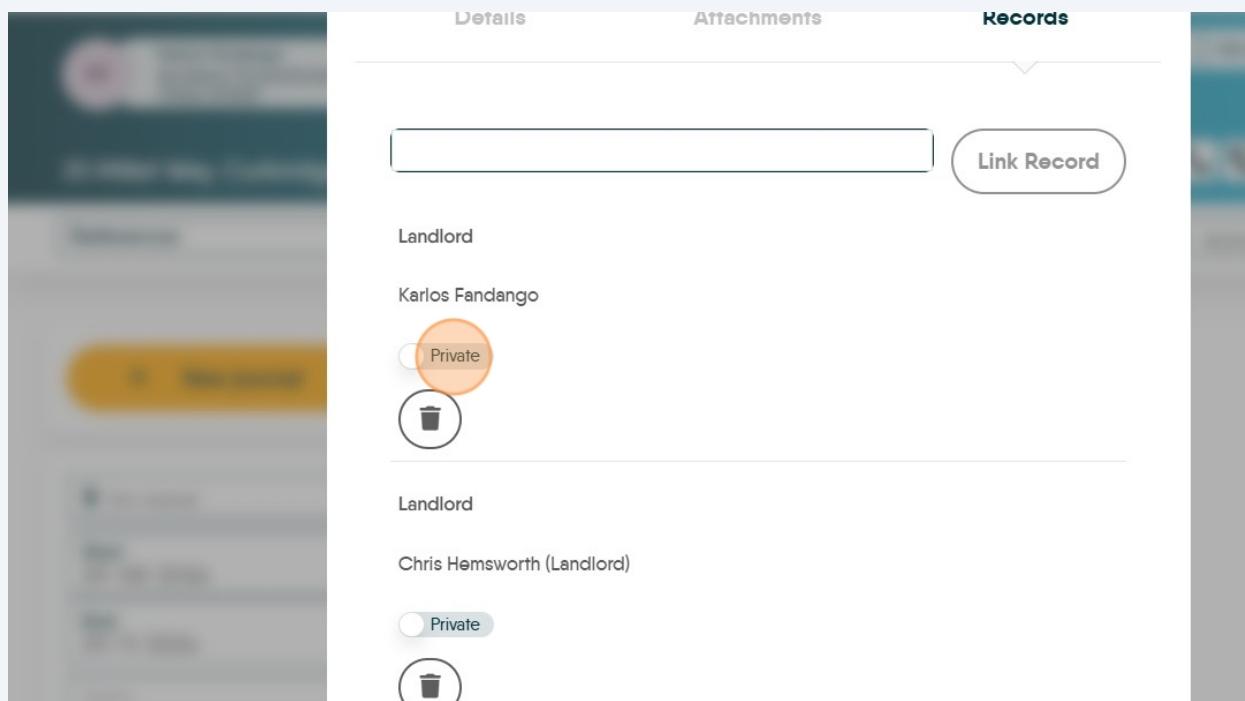
Type the name of the person or property you are linking to and select them from the list.

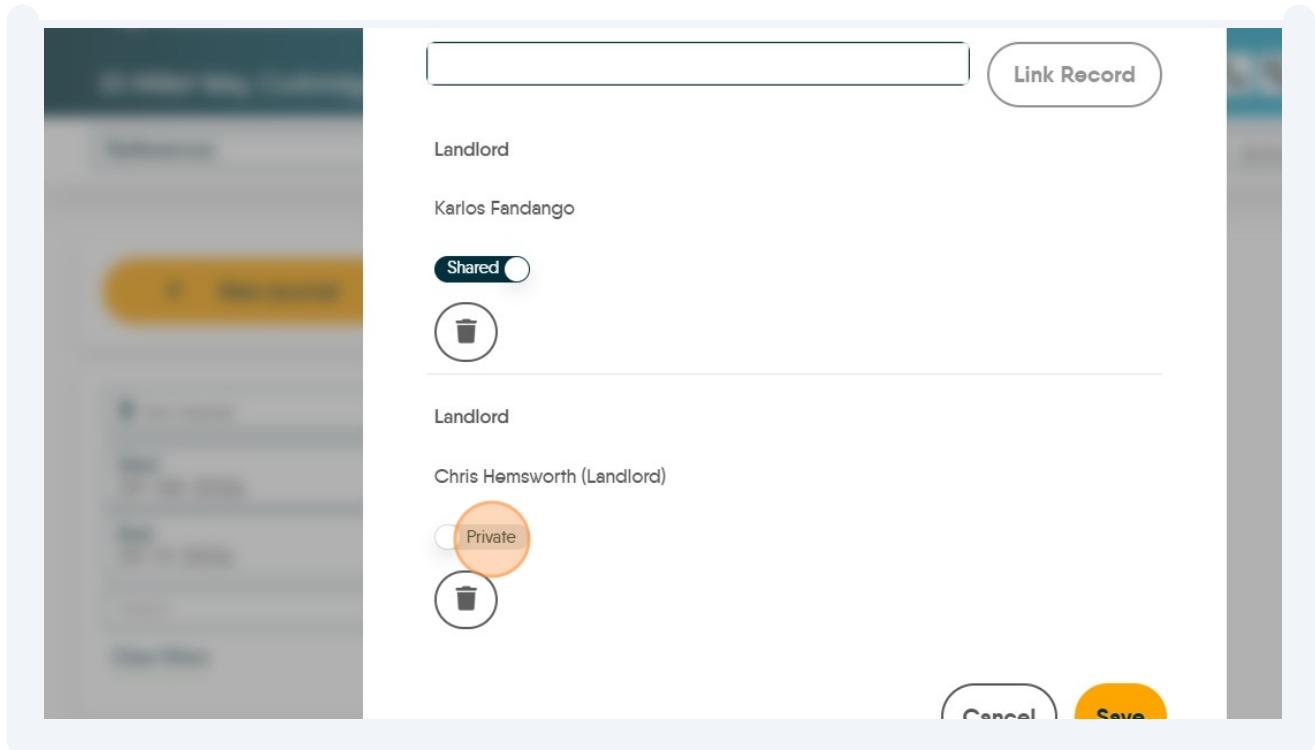


50 Click "Link Record"

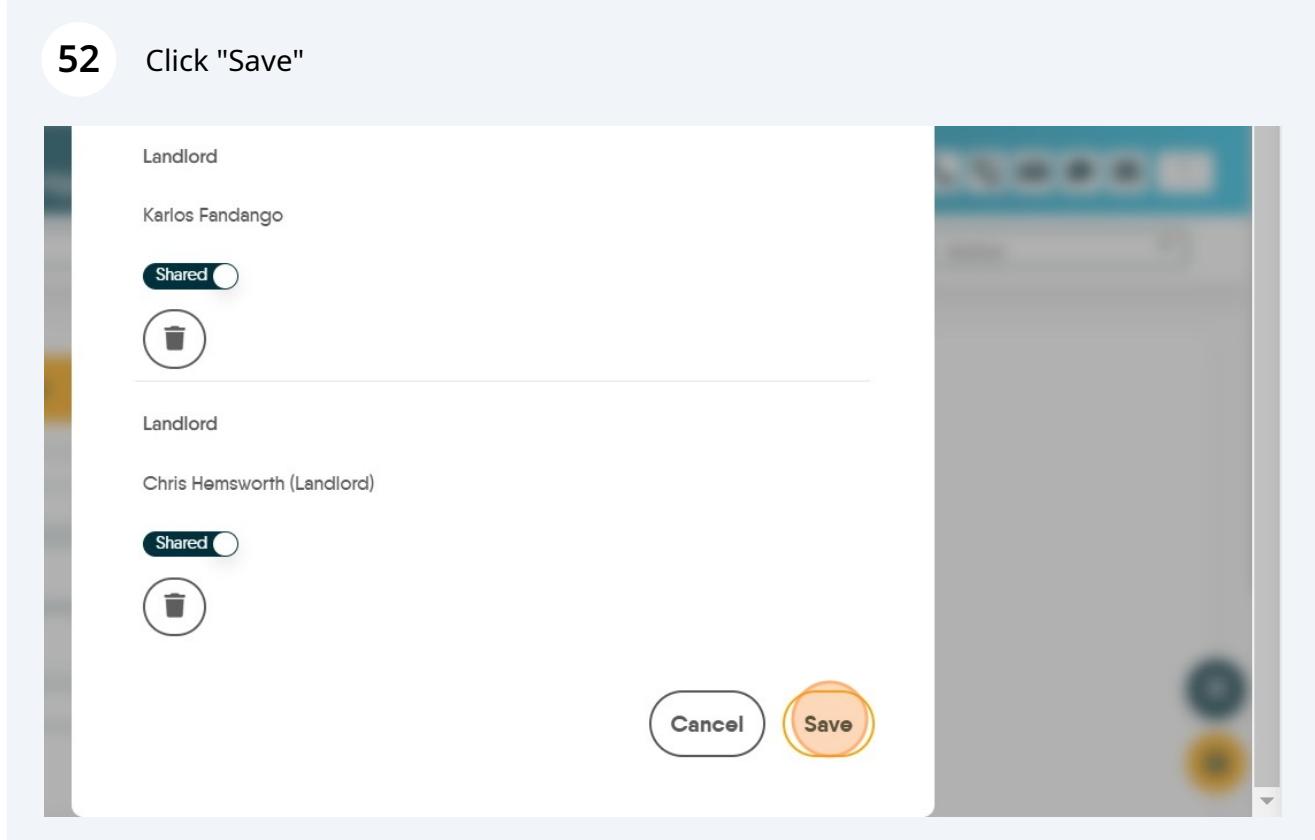


51 Click "Private" to make the Journal entry visible to both records and Client Portals

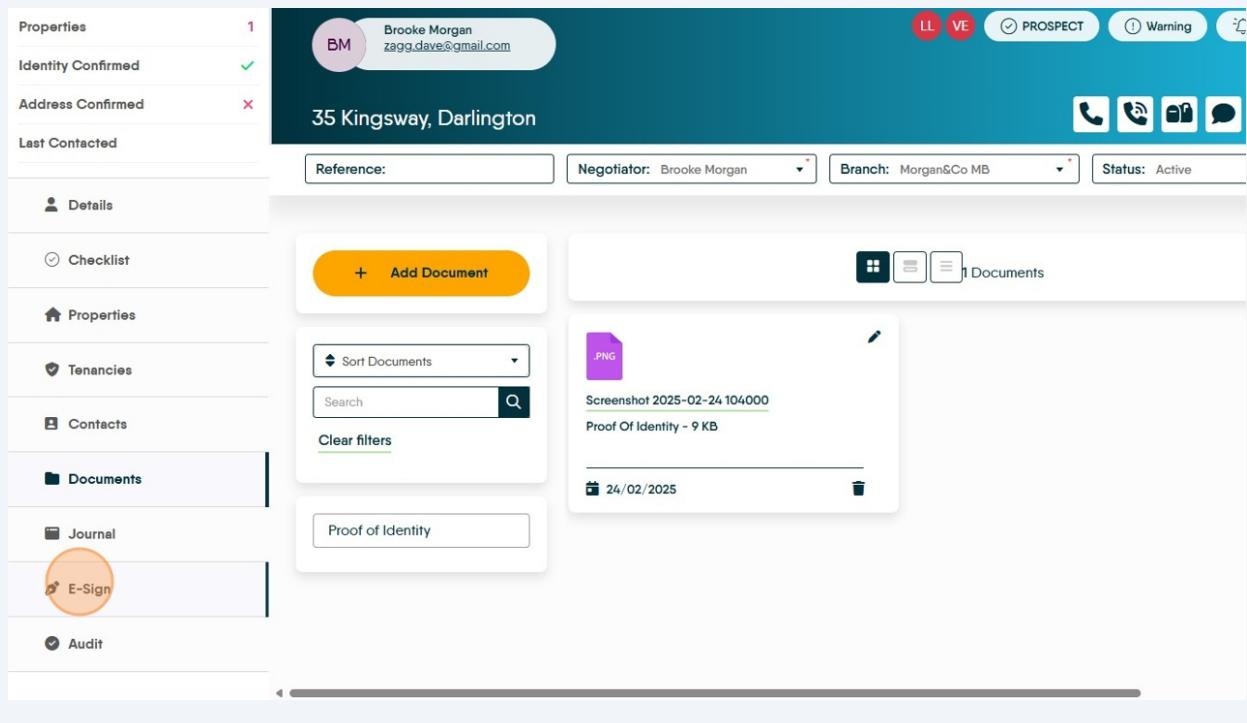




52 Click "Save"

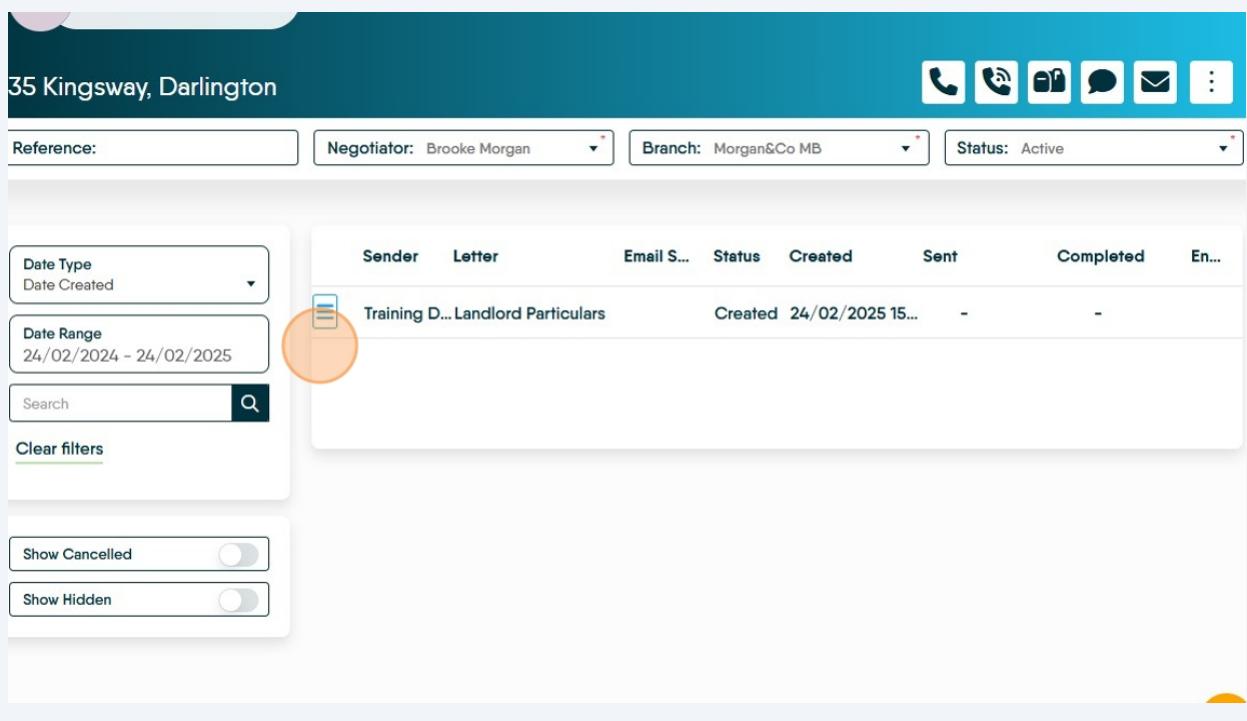


53 Click "E-Sign" to see any documents that have been sent via E-sign.



The screenshot shows a software interface for managing property records. At the top, there is a header with the name 'Brooke Morgan' and the email 'zagg.dave@gmail.com'. Below the header, the address '35 Kingsway, Darlington' is displayed. The interface includes several tabs on the left: 'Details', 'Checklist', 'Properties', 'Tenancies', 'Contacts', 'Documents' (which is the active tab), 'Journal', and 'E-Sign'. The 'E-Sign' tab is highlighted with an orange circle. On the right, there is a section titled '1 Documents' with a sub-section for 'Proof of Identity'. This sub-section shows a file named 'Screenshot 2025-02-24 104000' with a size of '9 KB' and a date of '24/02/2025'. There is also a small trash can icon.

54 This screen will allow you to track progress for E-sign letters sent in relation to this record. Any completed E-sign documents will come back and show in here.

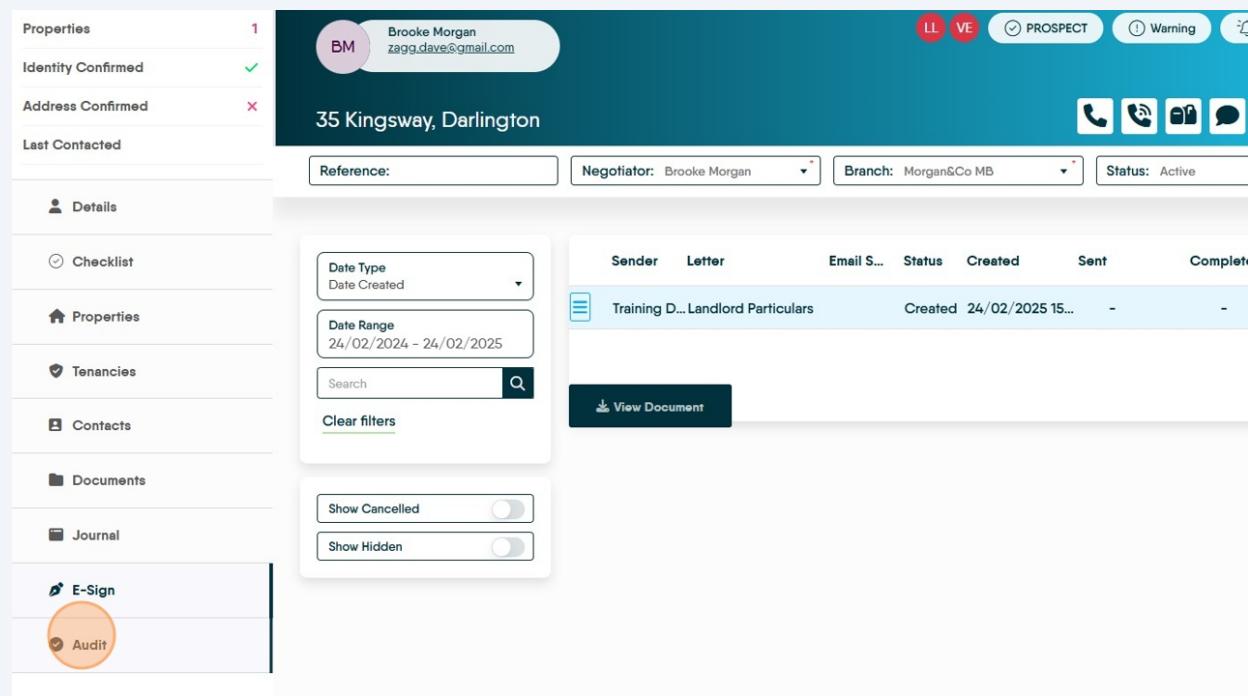


The screenshot shows a software interface for tracking E-sign progress. At the top, there is a header with the address '35 Kingsway, Darlington'. Below the header, there are several dropdown menus: 'Reference', 'Negotiator' (set to 'Brooke Morgan'), 'Branch' (set to 'Morgan&Co MB'), and 'Status' (set to 'Active'). On the left, there are filter options: 'Date Type' (set to 'Date Created'), 'Date Range' (set to '24/02/2024 - 24/02/2025'), a 'Search' bar, and 'Clear filters'. On the right, there is a table with columns: 'Sender', 'Letter', 'Email S...', 'Status', 'Created', 'Sent', 'Completed', and 'En...'. The table shows one row: 'Training D... Landlord Particulars' with a status of 'Created' and a date of '24/02/2025 15...'. There are also buttons for 'Show Cancelled' and 'Show Hidden'.

Audit

55

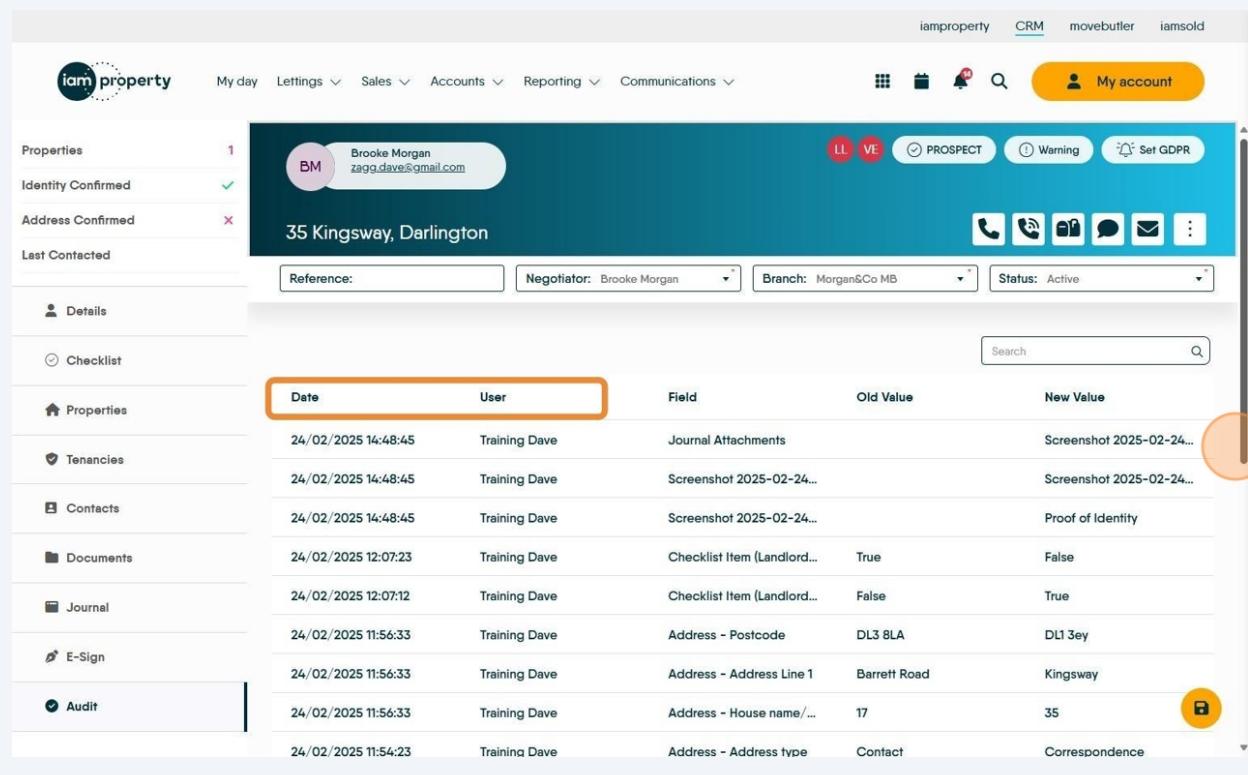
The Audit screen has a full list of all the 'clicks' made in the record since it was created. Click "Audit"



This screenshot shows the Audit screen for a property record. The top navigation bar includes 'Properties' (1), 'Identity Confirmed' (green checkmark), 'Address Confirmed' (red X), 'Last Contacted' (empty), and a user profile for 'Brooke Morgan' (zagg.dave@gmail.com). Status indicators include 'LL' (red), 'VE' (red), 'PROSPECT' (green), 'Warning' (yellow), and 'Set GDPR' (blue). The main content area displays the address '35 Kingsway, Darlington'. Below this are filter options: 'Reference' (empty), 'Negotiator: Brooke Morgan', 'Branch: Morgan&Co MB', and 'Status: Active'. A sidebar on the left lists categories: Details, Checklist, Properties, Tenancies, Contacts, Documents, Journal, E-Sign, and Audit. The Audit section is highlighted with an orange circle. The main table lists audit entries with columns for 'Sender', 'Letter', 'Email S...', 'Status', 'Created', 'Sent', and 'Complete'. One entry is visible: 'Training D... Landlord Particulars' (Created 24/02/2025 15...). A 'View Document' button is present. At the bottom of the sidebar are 'Show Cancelled' and 'Show Hidden' filters.

56

The screen shows the Date the change was made and the User that made the change.

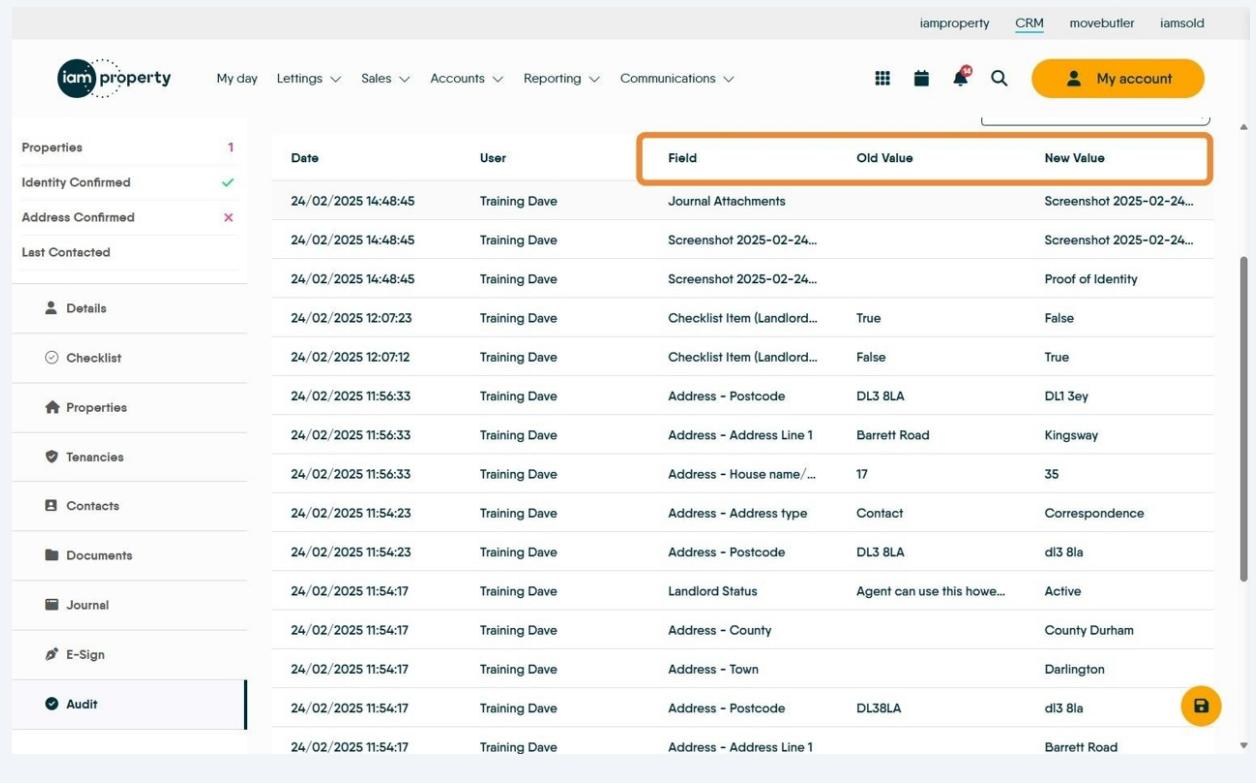


This screenshot shows the Audit screen for a property record, similar to the previous one but with a different layout. The top navigation bar includes 'iamproperty' (green), 'CRM' (blue), 'movebutler' (grey), and 'iamsold' (grey). The main content area displays the address '35 Kingsway, Darlington'. Below this are filter options: 'Reference' (empty), 'Negotiator: Brooke Morgan', 'Branch: Morgan&Co MB', and 'Status: Active'. A sidebar on the left lists categories: Details, Checklist, Properties, Tenancies, Contacts, Documents, Journal, E-Sign, and Audit. The Audit section is highlighted with an orange circle. The main table lists audit entries with columns for 'Date', 'User', 'Field', 'Old Value', and 'New Value'. The table shows several changes made by 'Training Dave' on 24/02/2025, including: 'Journal Attachments' (Screenshot 2025-02-24...), 'Screenshot 2025-02-24...' (Screenshot 2025-02-24...), 'Proof of Identity' (Screenshot 2025-02-24...), 'True' (False), 'False' (True), 'DL3 8LA' (DL1 3ey), 'Barrett Road' (Kingsway), and 'Address - House name/...' (17). A 'Search' bar is at the top right of the table area.

57

Field shows what was changed in the record e.g. Address Postcode.

The 'Old Value' is what the entry was, 'New Value' is what the option was changed to. These could be a blank space or it could be 'False' which could show a checklist item was not selected or 'True' which could show that a checklist item was selected.



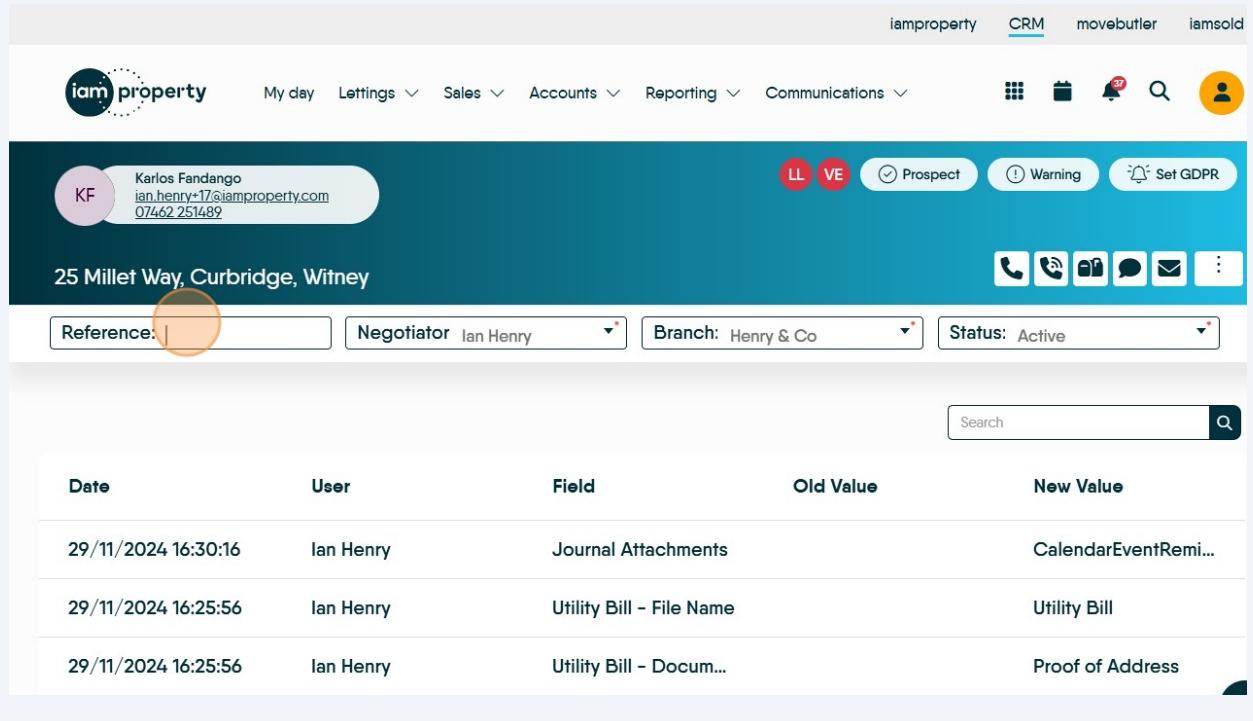
Properties	1	Date	User	Field	Old Value	New Value
Identity Confirmed	✓	24/02/2025 14:48:45	Training Dave	Journal Attachments		Screenshot 2025-02-24...
Address Confirmed	✗	24/02/2025 14:48:45	Training Dave	Screenshot 2025-02-24...		Screenshot 2025-02-24...
Last Contacted		24/02/2025 14:48:45	Training Dave	Screenshot 2025-02-24...		Proof of Identity
Details		24/02/2025 12:07:23	Training Dave	Checklist Item (Landlord...	True	False
Checklist		24/02/2025 12:07:12	Training Dave	Checklist Item (Landlord...	False	True
Properties		24/02/2025 11:56:33	Training Dave	Address - Postcode	DL3 8LA	DL1 3ey
Tenancies		24/02/2025 11:56:33	Training Dave	Address - Address Line 1	Barrett Road	Kingsway
Contacts		24/02/2025 11:54:23	Training Dave	Address - House name/...	17	35
Documents		24/02/2025 11:54:23	Training Dave	Address - Address type	Contact	Correspondence
Journal		24/02/2025 11:54:17	Training Dave	Address - Postcode	DL3 8LA	dl3 8la
E-Sign		24/02/2025 11:54:17	Training Dave	Landlord Status	Agent can use this howe...	Active
Audit		24/02/2025 11:54:17	Training Dave	Address - County		County Durham
		24/02/2025 11:54:17	Training Dave	Address - Town		Darlington
		24/02/2025 11:54:17	Training Dave	Address - Postcode	DL38LA	dl3 8la
		24/02/2025 11:54:17	Training Dave	Address - Address Line 1		Barrett Road

Top of the Screen

58 **Reference** is for your Internal Reference, it is your decision how to use this.

Negotiator and **Branch** are the who and where the record is allocated. For example CRM will show any Portal Enquiries against the name of the Negotiator registered to a property.

Status is an information field it has no control, although can be reported against.



The screenshot shows the iamproperty CRM interface. At the top, there are navigation links: My day, Lettings, Sales, Accounts, Reporting, Communications, and a user profile icon. Below the header, a banner displays the contact information for Karlos Fandango: **KF**, Karlos Fandango, ian.henry-17@iamproperty.com, 07462 251489. To the right of the banner are status indicators: LL, VE, Prospect, Warning, and Set GDPR. Below the banner, the property address **25 Millet Way, Curbridge, Witney** is displayed. On the right side of the property card are several icons for communication and action: phone, email, lock, message, and more. Below the property card, there are four dropdown menus: **Reference** (highlighted with a red circle), **Negotiator** (Ian Henry), **Branch** (Henry & Co), and **Status** (Active). A search bar is located at the bottom right of the main content area. At the very bottom, a table shows a history of recent changes:

Date	User	Field	Old Value	New Value
29/11/2024 16:30:16	Ian Henry	Journal Attachments		CalendarEventRemi...
29/11/2024 16:25:56	Ian Henry	Utility Bill - File Name		Utility Bill
29/11/2024 16:25:56	Ian Henry	Utility Bill - Docum...		Proof of Address