

Adding a New Landlord Record in CRM

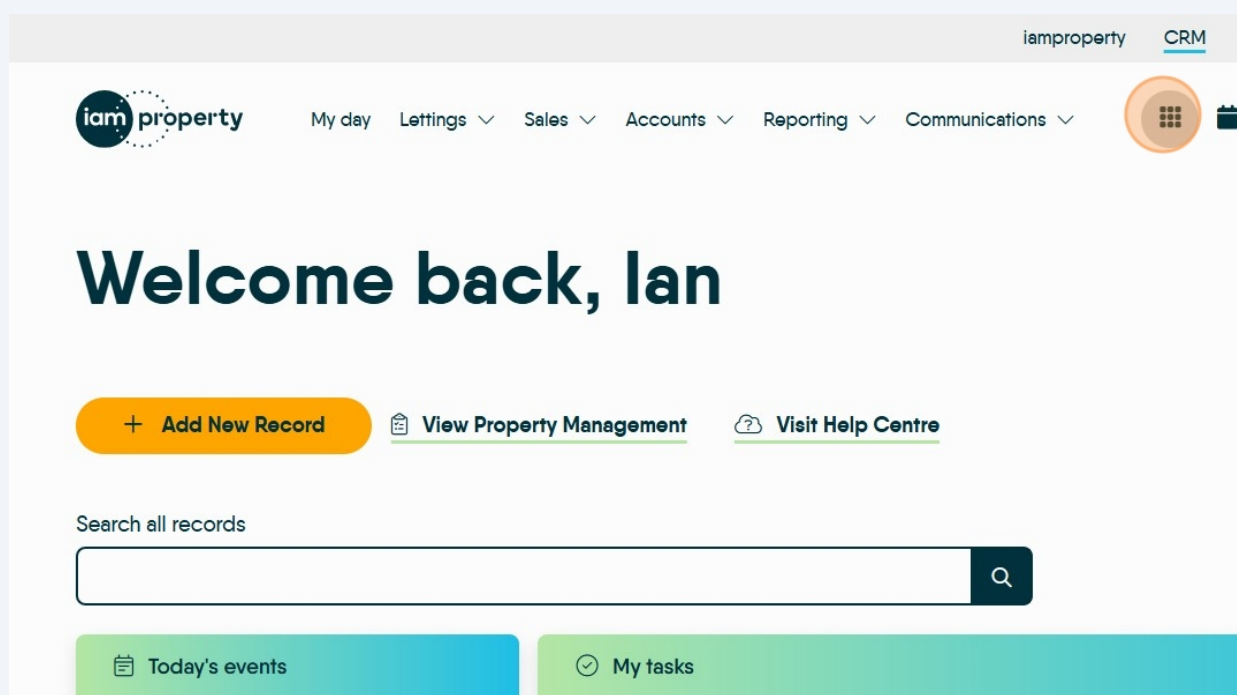


This guide provides a step-by-step process for adding a new landlord record in the CRM system, ensuring users can efficiently manage client information. It emphasises best practices, such as merging records to avoid duplication and creating necessary fields like salutation for personalised communication.

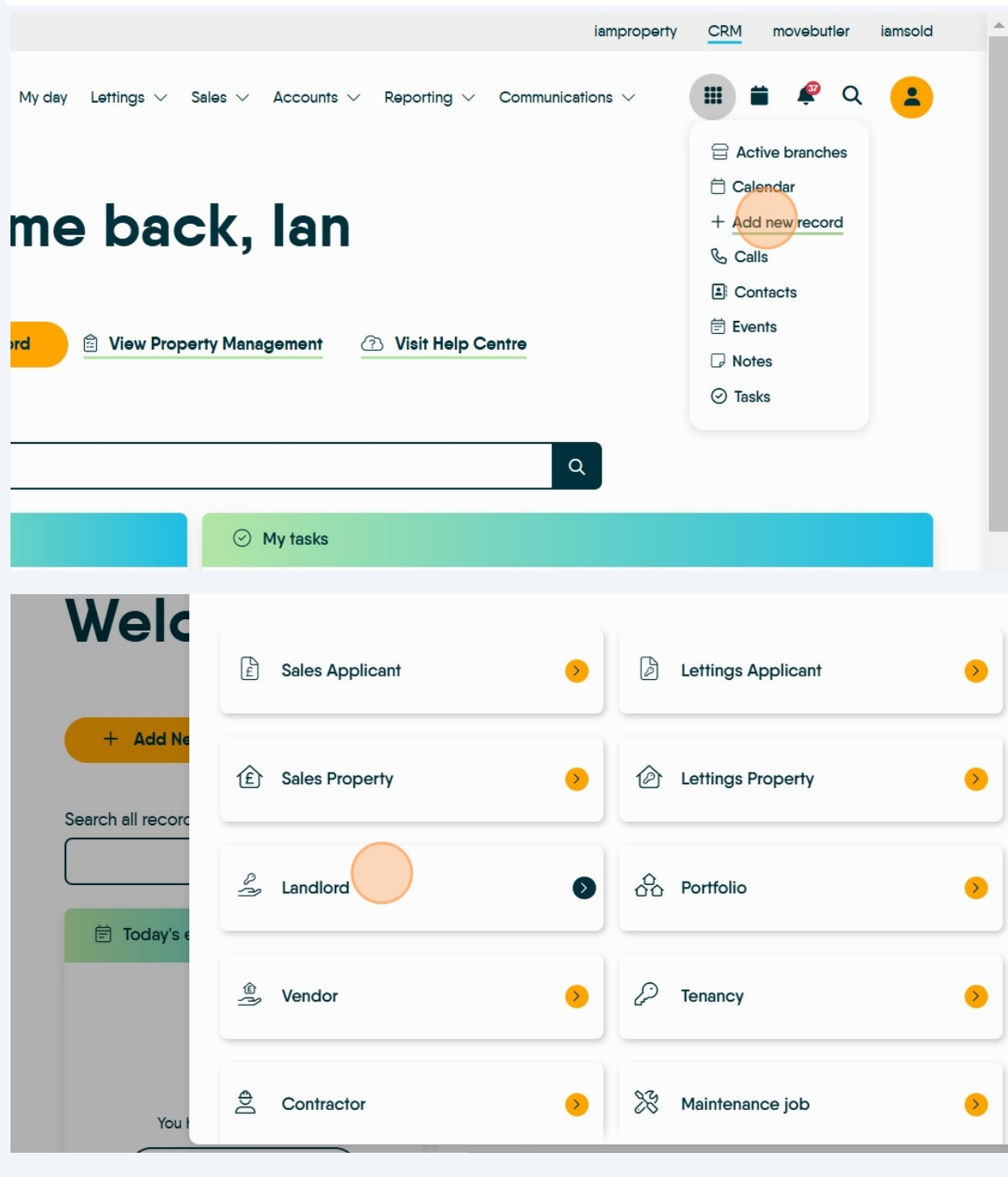
By following this guide, users can streamline their data entry processes and enhance their interactions with landlords, ultimately improving their property management efficiency.

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

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



3 Click "Add new record"
Click "Landlord"



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 CRM form for 'Personal Details'. At the top, there are three dropdown menus: 'Negotiator' (Ilan Henry), 'Branch' (Henry & Co), and 'Status' (Active). Below these is an 'Import' button with a person icon. The main form is divided into two columns. The left column contains fields for 'Title' (with a dropdown menu open showing options: Mr, Miss, Mrs, Ms, Mr & Mrs), 'Forename', 'Surname', 'Company name', 'Website', 'Phone number', 'Work phone', 'Mobile phone', 'Email address', and 'Salutation'. The right column is titled 'Financial information' and contains fields for 'Overseas' (toggle), 'Tax enabled' (toggle), 'Exclude from payments' (checkbox), 'Registration no', 'Cnr no', 'Cnr approval date' (29/11/2024), 'Tax rate' (0), 'Vat registration no', and 'Hmrc due date' (29/11/2024). An orange circle highlights the 'Title' field.



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 Import

Title Mr	Forename
Surname	Company name
Website	Phone number
Work phone	Mobile phone
Email address	Salutation

Financial information

Overseas	Tax enabled
Exclude from payments	
Registration no	Cnr no
Cnr approval date 29/11/2024	Tax rate 0
Vat registration no	Hmrc due date 29/11/2024

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

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

Personal information Import

Title Mr	Forename Karlos
Surname	Company name
Website	Phone number
Work phone	Mobile phone
Email address	Salutation

Financial information

Overseas	Tax enabled
Exclude from payments	
Registration no	Cnr no
Cnr approval date 29/11/2024	Tax rate 0
Vat registration no	Hmrc due date 29/11/2024
Statement	Send statement

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

The screenshot shows a CRM interface with a client profile form. At the top, there are fields for 'Reference:', 'Negotiator' (set to 'Ian Henry'), 'Branch' (set to 'Henry & Co'), and 'Status' (set to 'Active'). Below this, the form is divided into two main sections: 'Personal information' and 'Financial information'. The 'Personal information' section includes fields for 'Title' (Mr), 'Forename' (Karlos), 'Surname' (Fandango), 'Company name', 'Website', 'Phone number', 'Work phone', 'Mobile phone' (highlighted with an orange circle), 'Email address', 'Salutation', and 'Agreement name'. The 'Financial information' section includes fields for 'Overseas' (toggle), 'Tax enabled', 'Exclude from payments', 'Registration no', 'Cnr no', 'Cnr approval date' (29/11/2024), 'Tax rate' (0), 'Vat registration no', 'Hmrc due date' (29/11/2024), 'Statement', and 'Send statement'. An 'Import' button is located between the two sections.

Personal information		Financial information	
Title Mr	Forename Karlos	Overseas <input type="checkbox"/>	Tax enabled <input type="checkbox"/>
Surname Fandango	Company name	Exclude from payments	
Website	Phone number	Registration no	Cnr no
Work phone	Mobile phone	Cnr approval date 29/11/2024	Tax rate 0
Email address	Salutation	Vat registration no	Hmrc due date 29/11/2024
Agreement name	Source	Statement	Send statement

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		Financial information	
<div>Title Mr</div>	<div>Forename Karlos</div>	<div>Overseas</div>	<div>Tax enabled</div>
<div>Surname Fandango</div>	<div>Company name</div>	<div>Exclude from payments</div>	
<div>Website</div>	<div>Phone number</div>	<div>Registration no</div>	<div>Cnr no</div>
<div>Work phone</div>	<div>Mobile phone 07462 251489</div>	<div>Cnr approval date 29/11/2024</div>	<div>Tax rate 0</div>
<div>Email address</div>	<div>Salutation</div>	<div>Vat registration no</div>	<div>Hmrc due date 29/11/2024</div>
<div>Agreement name</div>	<div>Source</div>	<div>Statement No Statement</div>	<div>Send statement Email</div>
<div>Letting reason</div>		<div>Safe deposits type Registered</div>	<div>Safe deposits</div>

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

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

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

11

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

Personal information

 Import

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

Financial information

Overseas	Tax enabled
Exclude from payments	
Registration no	Cnr no
Cnr approval date 29/11/2024	Tax rate 0
Vat registration no	Hmrc due date 29/11/2024
Statement No Statement	Send statement via Email
Safe deposits type Registered	Safe deposits reg.

12

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

Personal information

 Import

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

Financial information

Overseas	Tax enabled
Exclude from payments	
Registration no	Cnr no
Cnr approval date 29/11/2024	Tax rate 0
Vat registration no	Hmrc due date 29/11/2024
Statement No Statement	Send statement Email
Safe deposits type Registered	Safe deposits

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.

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Number

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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

1

BM Brooke Morgan
zagg.dave@gmail.com

LL VE

PROSPECT

Warning

Set GDPR

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

Letting Reason

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

Safe Deposits Reg. No.

9

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 user named Brooke Morgan (zagg.dave@gmail.com). The interface is divided into two main sections: Personal Information and Financial Information. The 'Exclude From Payments' toggle is highlighted with an orange circle, indicating it is enabled. The 'Status' is set to 'Active'.

Personal Information		Financial Information	
Title: Ms	Forename: Brooke	Overseas: <input type="checkbox"/>	Tax Enabled: <input type="checkbox"/>
Surname: Morgan	Company Name:	Exclude From Payments: <input checked="" type="checkbox"/>	
Website:	Phone Number:	Registration No:	CNR No:
Work phone:	Mobile phone:	CNR Approval Date: 20/02/2025	Tax Rate: 0.00
Email Address: zagg.dave@gmail.com	Salutation: Ms Morgan	VAT Registration No:	HMRC Due Date: 20/02/2025
Agreement Name: Ms Brooke Morgan	Source:	Statement: No Statement	Send Statement Via: Email
Letting Reason:		Safe Deposits Type: Registered	Safe Deposits Reg. No.

15

Click this text field.

The screenshot shows the same CRM interface as above, but with the 'Registration No' text field highlighted by an orange circle. The 'Exclude From Payments' toggle is still enabled.

Personal Information		Financial Information	
Title: Ms	Forename: Brooke	Overseas: <input type="checkbox"/>	Tax Enabled: <input type="checkbox"/>
Surname: Morgan	Company Name:	Exclude From Payments: <input checked="" type="checkbox"/>	
Website:	Phone Number:	Registration No:	CNR No:
Work phone:	Mobile phone:	CNR Approval Date: 20/02/2025	Tax Rate: 0.00
Email Address: zagg.dave@gmail.com	Salutation: Ms Morgan	VAT Registration No:	HMRC Due Date: 20/02/2025
Agreement Name: Ms Brooke Morgan	Source:	Statement: No Statement	Send Statement Via: Email
Letting Reason:		Safe Deposits Type: Registered	Safe Deposits Reg. No.

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.

The screenshot shows a user profile for Brooke Morgan (zagg.dave@gmail.com). The interface includes a top navigation bar with status indicators (LL, VE, PROSPECT, Warning, Set GDPR) and a sidebar with a list of items. The main content area is divided into two columns: Personal Information and Financial Information.

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: ☐
- 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.:

17

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

The screenshot shows the same user profile for Brooke Morgan. In this view, the 'CNR Approval Date' field in the 'Financial Information' section is highlighted with an orange circle.

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: ☐
- Tax Enabled: ☐
- Exclude From Payments: ☐
- Registration No:
- CNR No:
- CNR Approval Date:
- 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.:

18

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

The screenshot shows a form for 'Brooke Morgan' (zagg.dave@gmail.com). The 'Personal Information' section includes fields for 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, and Letting Reason. The 'Financial Information' section includes fields for 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), and Safe Deposits Reg. No. The 'Tax Rate' field is highlighted with an orange circle.

19

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

The screenshot shows the same form as above. The 'VAT Registration No' field in the 'Financial Information' section is highlighted with an orange circle.

20

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

The screenshot shows a form with various fields. On the left, there are fields for 'Mobile phone' (07462 251489), 'Salutation' (Mr Fandango), 'Source' (Rightmove), and 'Postcode'. An 'Edit address' button is visible. On the right, there are fields for 'Cnr approval date' (29/11/2024), 'Tax rate' (0), 'Vat registration no', 'Hmrc due date' (29/11/2024), 'Send statement via' (Email), and 'Safe deposits reg. no.'. The 'Statement' dropdown menu is open, showing options: 'No Statement', 'Landlord Statement' (highlighted with an orange circle), 'Consolidated Statement', 'Grouped Consolidated Statement', 'Portfolio Statement', and 'Advanced Landlord'. A hamburger menu icon is visible in the bottom right corner.

21

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

The screenshot shows the same form as in step 20. The 'Send statement via' dropdown menu is open, showing options: 'Email' (highlighted with an orange circle) and 'Letter'. The 'Statement' dropdown menu is now set to 'Landlord Statement'. The 'Safe deposits type' dropdown menu is set to 'Registered'. The 'Financial notes' section is visible at the bottom, containing a text area with formatting icons (B, I, U, and a link icon).

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.

<input type="text"/>	Phone number
<input type="text"/>	Mobile phone 07462 251489
<input type="text"/>	Salutation Mr Fandango
<input type="text"/>	Source Rightmove
<input type="text"/>	

Edit address

<input type="text"/>	Postcode
<input type="text"/>	

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	Send statement via Email
Safe deposits type Registered	Safe deposits reg. no.

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 'iamproperty' web application. At the top, there's a navigation bar with 'My day', 'Lettings', 'Sales', 'Accounts', 'Reporting', and 'Communications'. Below this, the 'Address' section is highlighted. It contains a dropdown for 'Address type' (currently set to 'Contact'), a 'Postcode' field, and an 'Edit address' button. To the right, there's a 'Financial notes' section with a text area and formatting icons (B, I, U, and a link icon). Above the 'Address' section, there's a 'Letting reason' dropdown set to 'New rental investment' and a 'Safe deposits type' dropdown set to 'Not Registered'.

24

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

The screenshot shows the 'iamproperty' web application with the 'Checklist' section selected in the left sidebar. The main area displays the 'Personal information' section for 'Karlos Fandango'. It includes a header with the user's name, email, and phone number. Below this, there's a 'Reference' field, a 'Negotiator' dropdown set to 'Ian Henry', and a 'Branch' field. The 'Personal information' section contains several input fields: 'Title' (set to 'Mr'), 'Forename' (set to 'Karlos'), 'Surname' (set to 'Fandango'), 'Company name', 'Website', 'Phone number', and 'Work phone'. The 'Phone number' field is set to '07462 251489'. To the right, there's a 'Financial' section with fields for 'Over', 'Excl', 'Regis', and 'Cnr aj'.

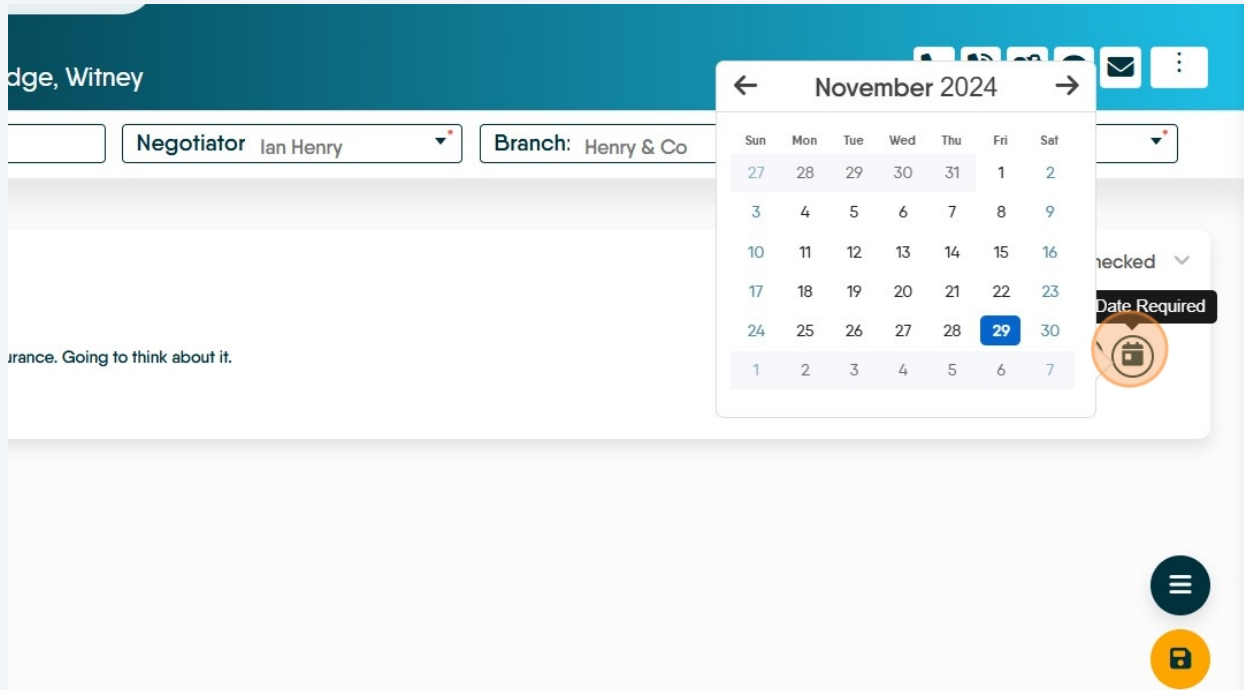
25 Click here to add a note to the Checklist query.

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 displays the iamproperty CRM interface. The top navigation bar includes links for iamproperty, CRM, movebutler, and iamsold. The main header shows the user profile for Karlos Fandango (KF) with contact details and a status of Prospect. Below this, the property address is 25 Millet Way, Curbridge, Witney. The main content area shows a form with fields for Reference, Negotiator (Ian Henry), Branch (Henry & Co), and Status (Active). A section titled 'Add ons' shows a checklist item 'Landlord Insurance Offered?' with a checkbox and an 'Edit Notes' button. The bottom section shows a similar form for Brooke Morgan (BM) with the property address 35 Kingsway, Darlington. The 'Add ons' section for Brooke Morgan shows 'Landlord Insurance Offered' checked, with a note 'Checked by Training Dave on 24/02/2025 12:07'. A sidebar on the left contains a list of menu items: Properties, Identity Confirmed, Address Confirmed, Last Contacted, Details, Checklist, Properties, Tenancies, Contacts, Documents, Journal, E-Sign, and Audit.

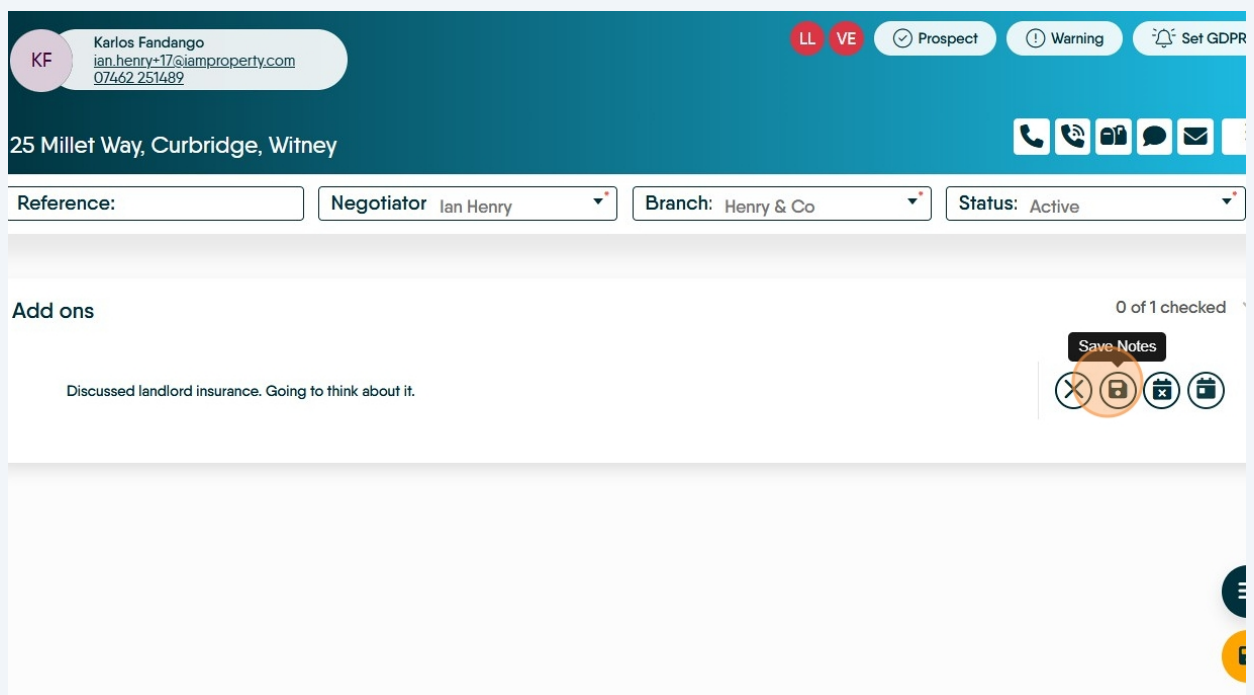
26

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.

25 Millet Way, Curbridge, Witney

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

0 of 1 checked

Landlord Insurance Offered? Date Required: 06/12/2024
Discussed landlord insurance. Going to think about it.

Save Changes

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.

Identity Confirmed ✗
Address Confirmed ✗
Last Contacted

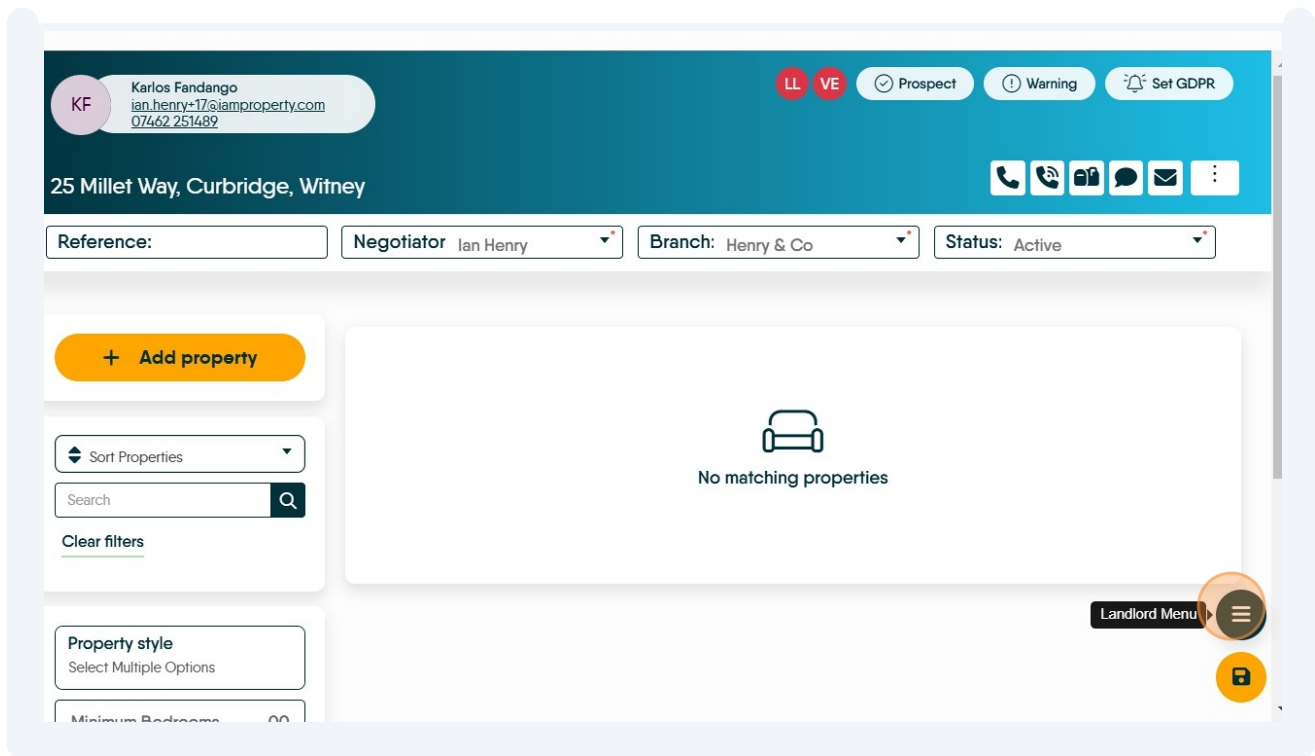
Details
Checklist
Properties
Tenancies
Contacts
Documents
Journal

25 Millet Way, Curbridge, Witney

Reference: Negotiator: Ian Henry Branch:

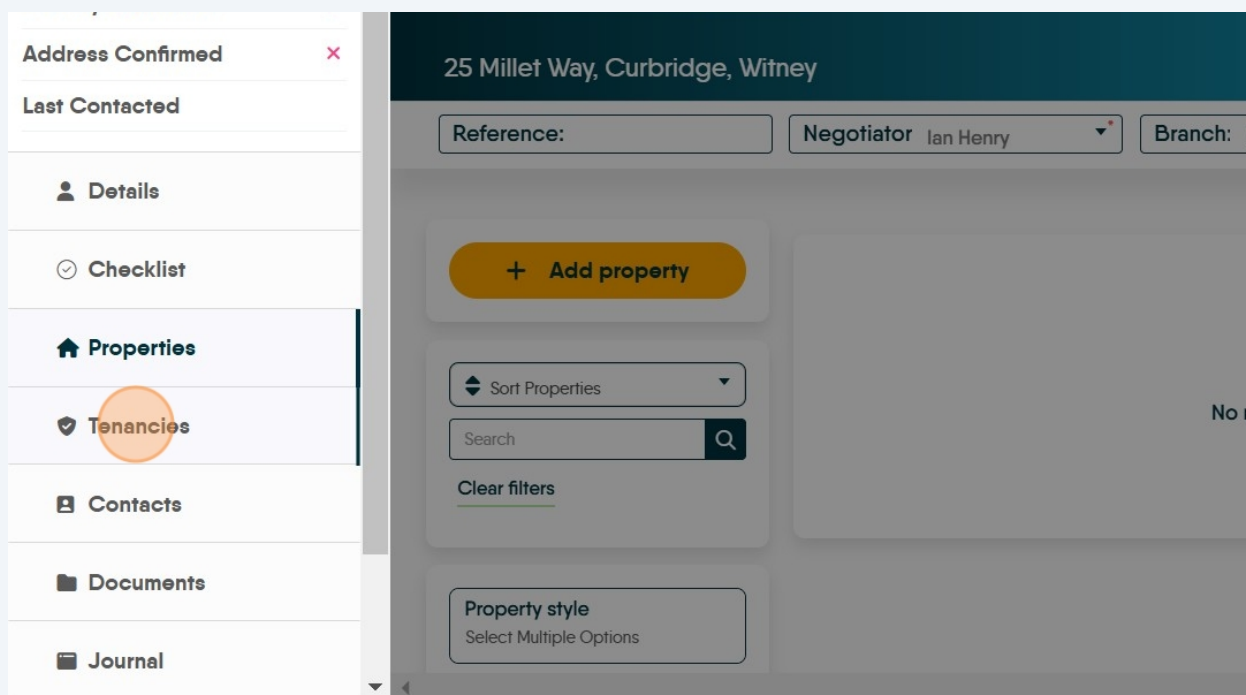
Add ons

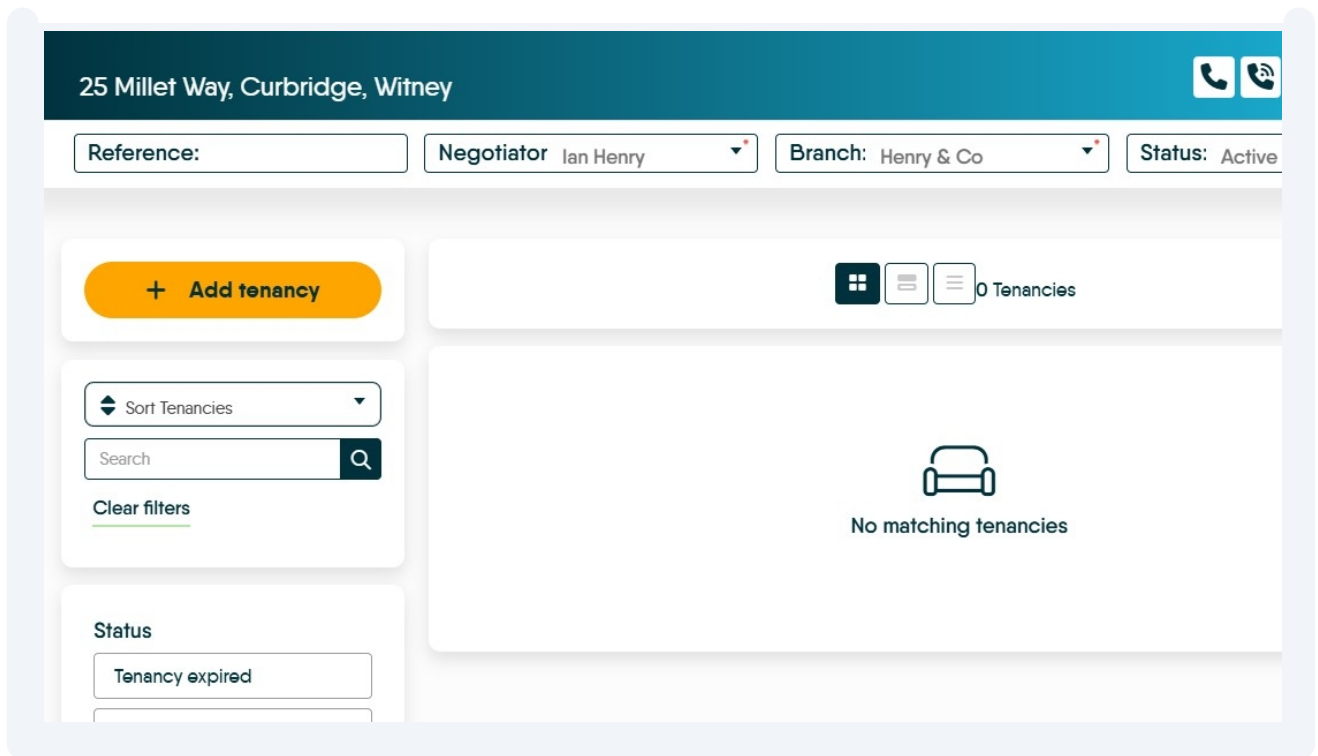
☐ Landlord Insurance Offered? Date Required: 06/12/2024
Discussed landlord insurance. Going to think about it.



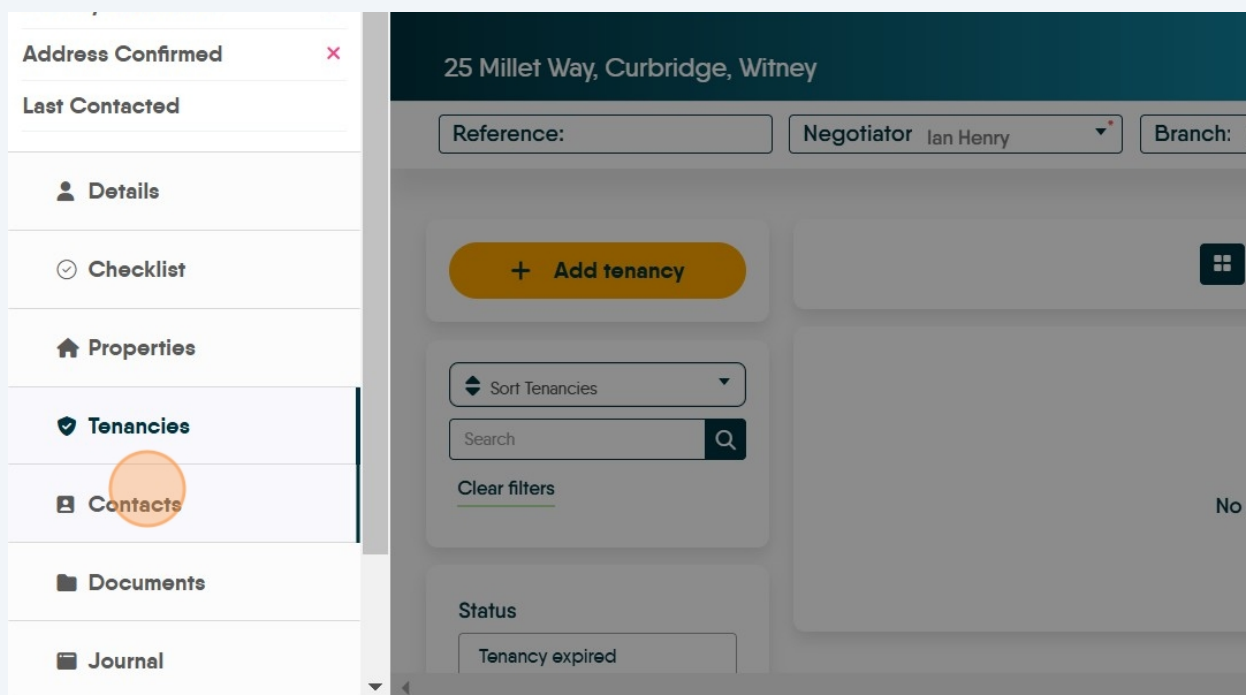
30

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

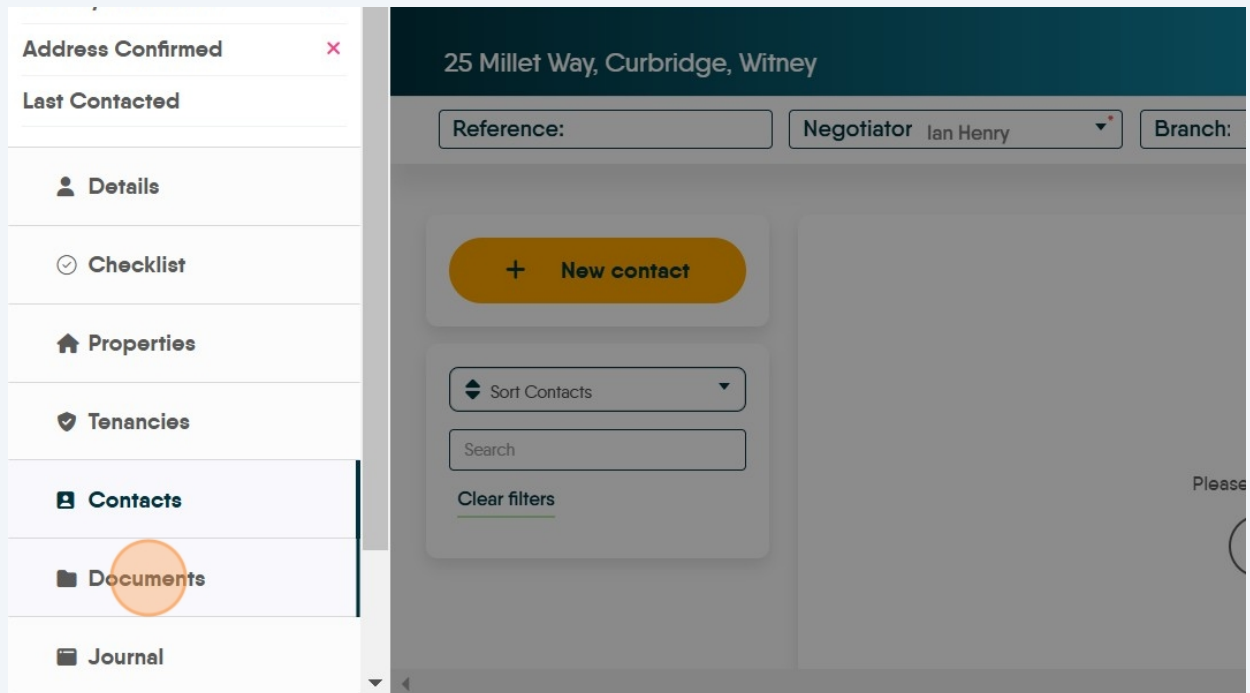




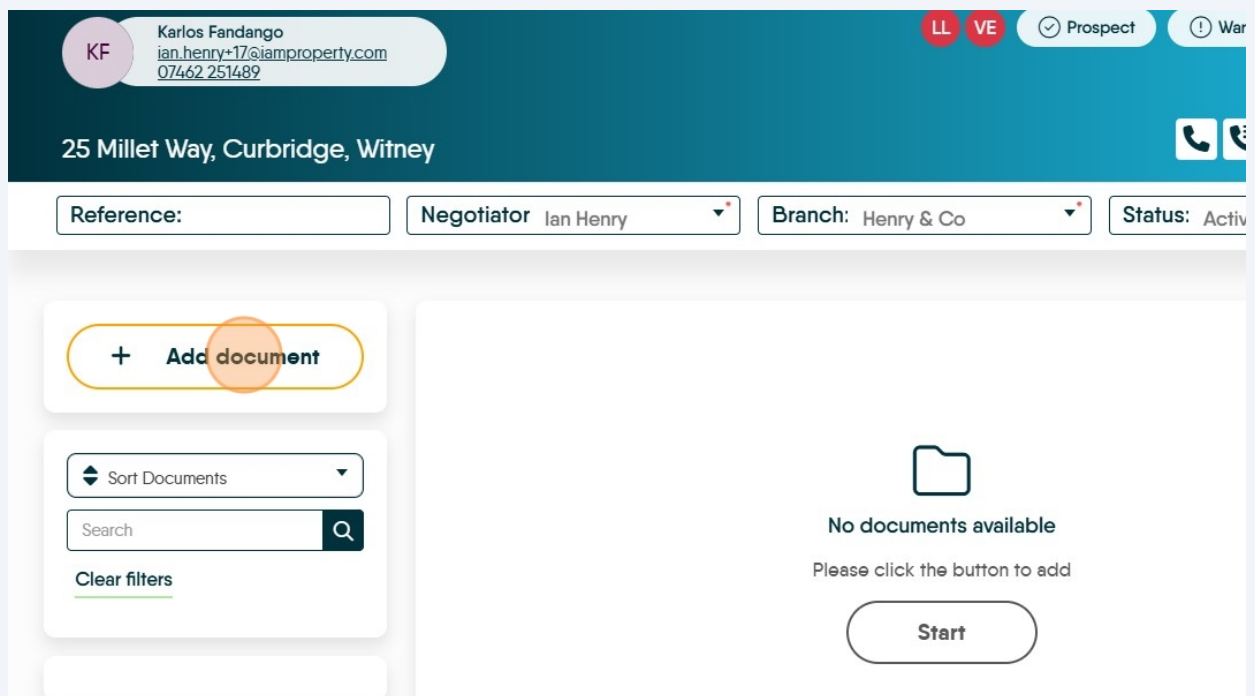
31 Click "Contacts" to see all the Landlords Contacts.



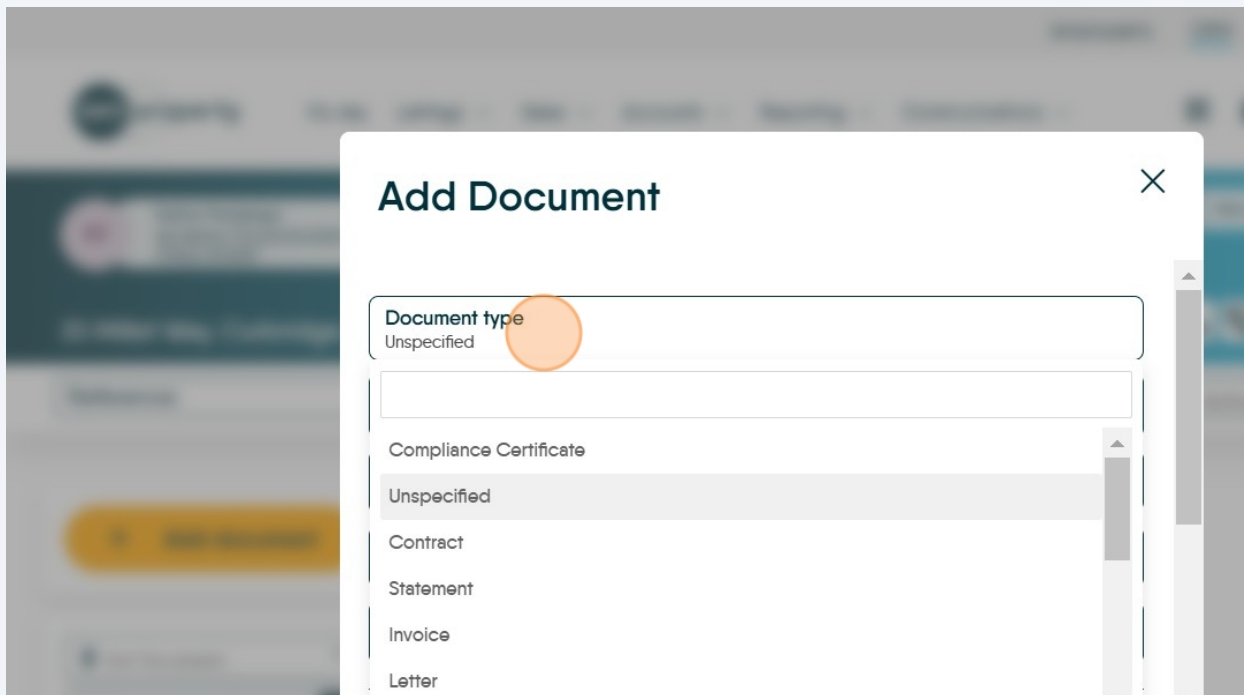
32 Click "Documents" to view or/and upload new documents to the record.



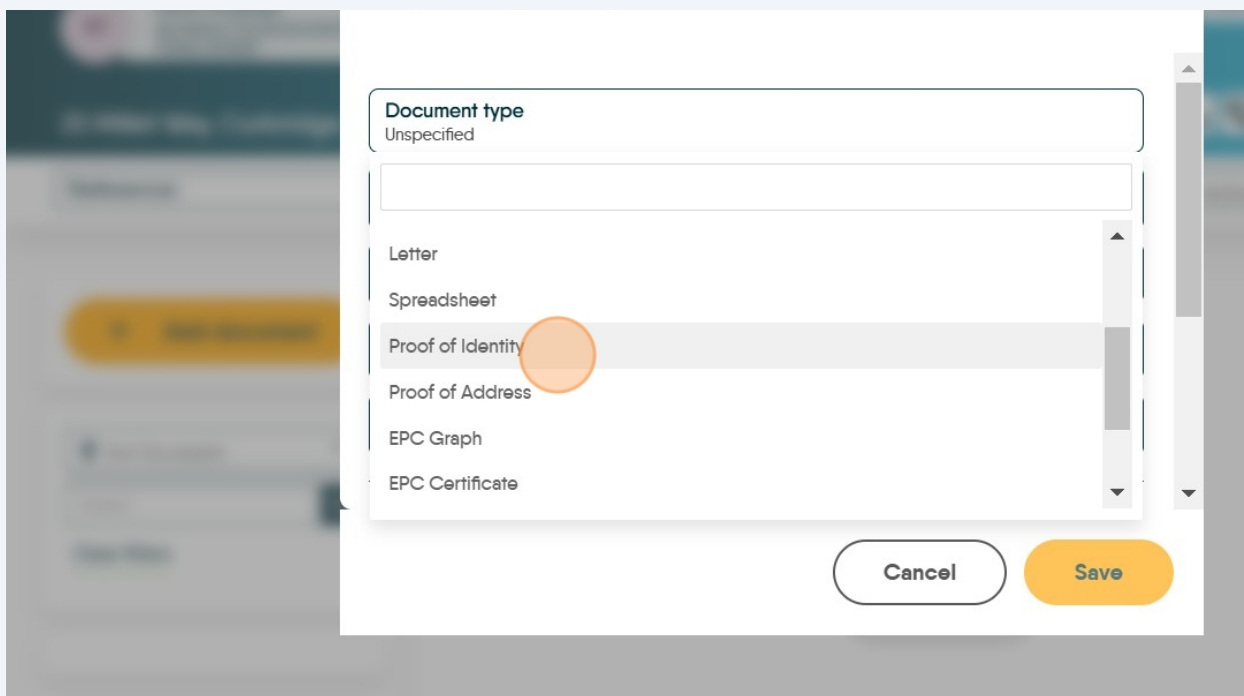
33 To upload a document. Click "Add Document"



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).

The screenshot shows a document management interface. A calendar is open, displaying the month of November 2024. The date 29 is highlighted in blue. Below the calendar, there is a text input field labeled "Expiry date" containing the text "29/11/2024". To the right of this field is a toggle switch labeled "Password protected". Below this is another toggle switch labeled "Client logins". At the bottom right, there are two buttons: "Cancel" and "Save".

Sun	Mon	Tue	Wed	Thu	Fri	Sat
27	28	29	30	31	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
1	2	3	4	5	6	7

Expiry date
29/11/2024

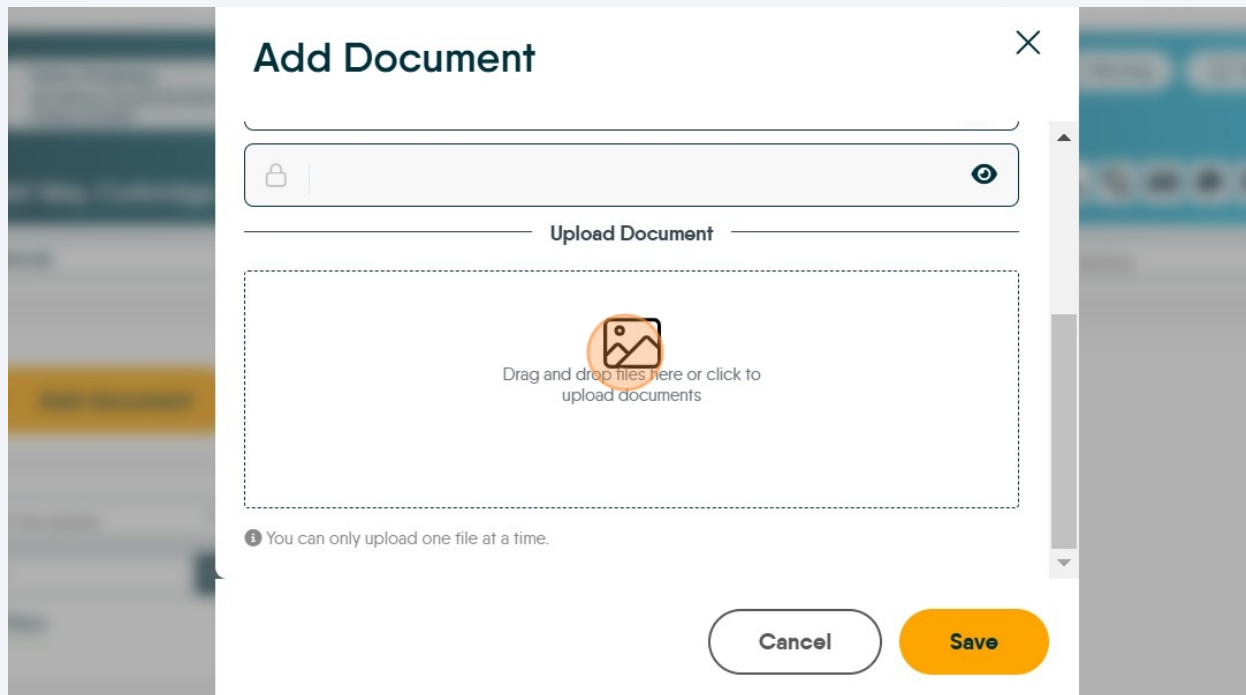
Password protected

Client logins

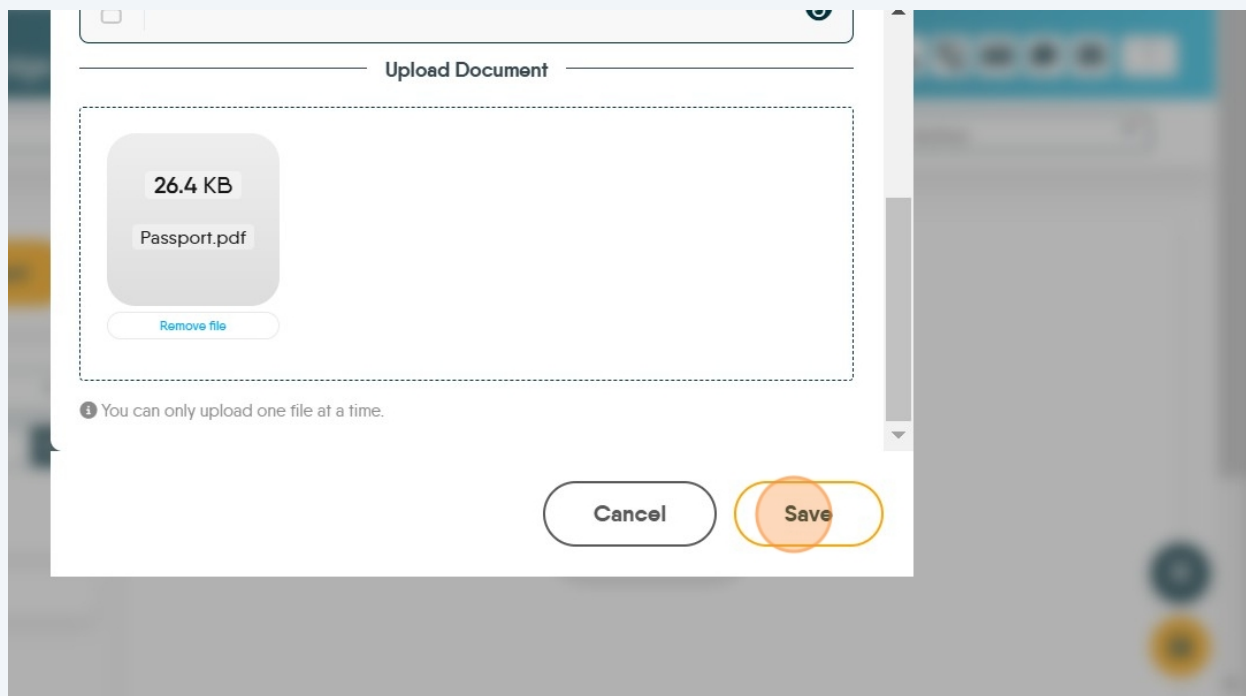
Upload Document

Cancel Save

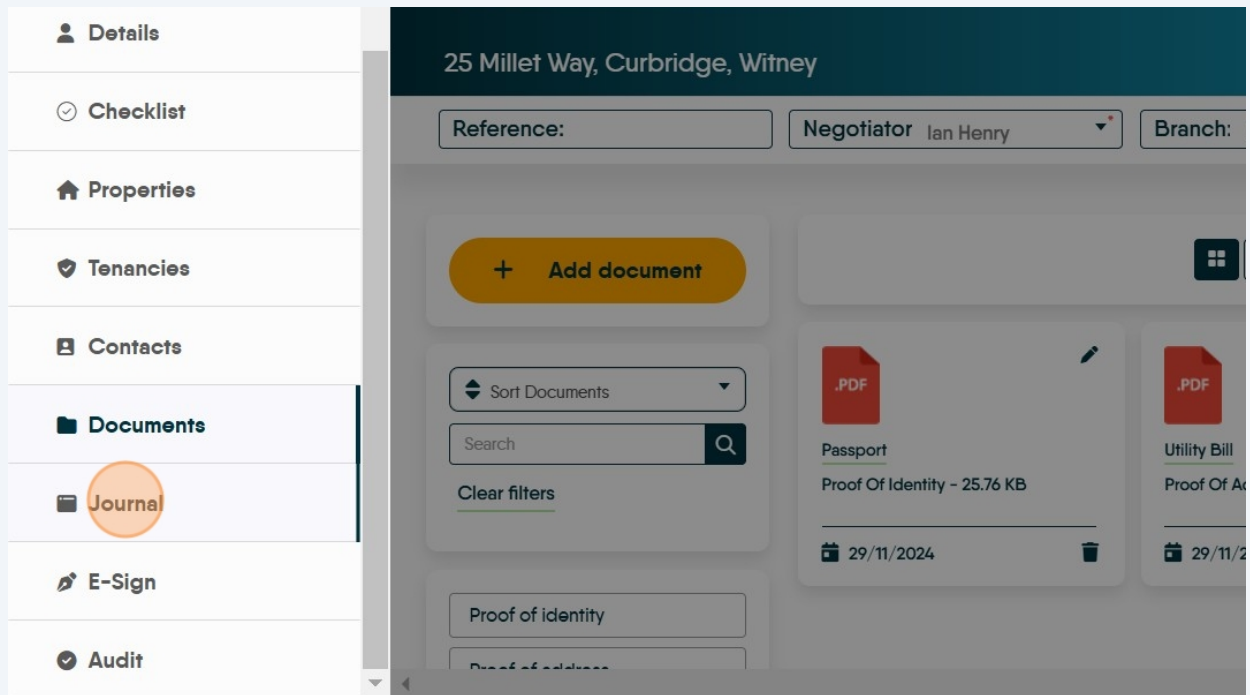
- 38 Click here to search for and select the document.



- 39 Click "Save"

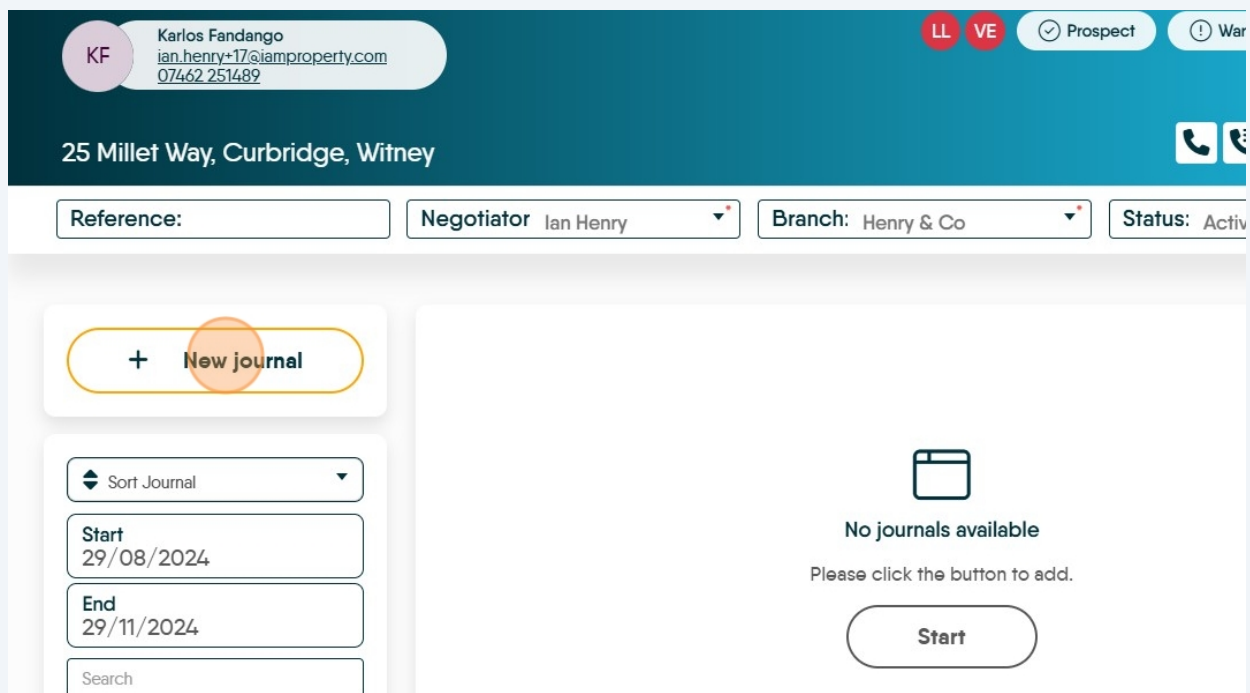


40 Click "Journal"



Adding Journal Entries

41 Click "New Journal"



42 Click "Select a Journal entry type"

The screenshot shows a modal window titled "Add New Journal Entry" with a close button (X) in the top right corner. The modal has three tabs: "Details", "Attachments", and "Records", with "Details" being the active tab. In the "Details" tab, there are three main sections. The first section contains a "Date" field with the value "29/11/2024 16:26" and a red asterisk. The second section contains an "Entry type" dropdown menu with the text "Select a Journal entry type" and a red asterisk; an orange circle highlights this dropdown. The third section contains a "Make public" toggle switch. Below these sections is a rich text editor with a toolbar containing icons for Bold (B), Italic (I), Underline (U), Text color (A), Background color (X), Link (S), and List (three horizontal lines). The dropdown menu is open, showing a list of options: "Reference(s)", "Rent Arrears", "SMS", "Task", and "Upload".

43 For example. Click "Call"

The screenshot shows the same "Add New Journal Entry" modal window. The "Entry type" dropdown menu is now closed, and "Call" is selected, indicated by a downward arrow next to the text. The "Make public" toggle switch is now turned on. The rich text editor toolbar is visible, and an orange circle highlights the editor area. At the bottom of the modal, there are two buttons: "Cancel" and "Save".

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

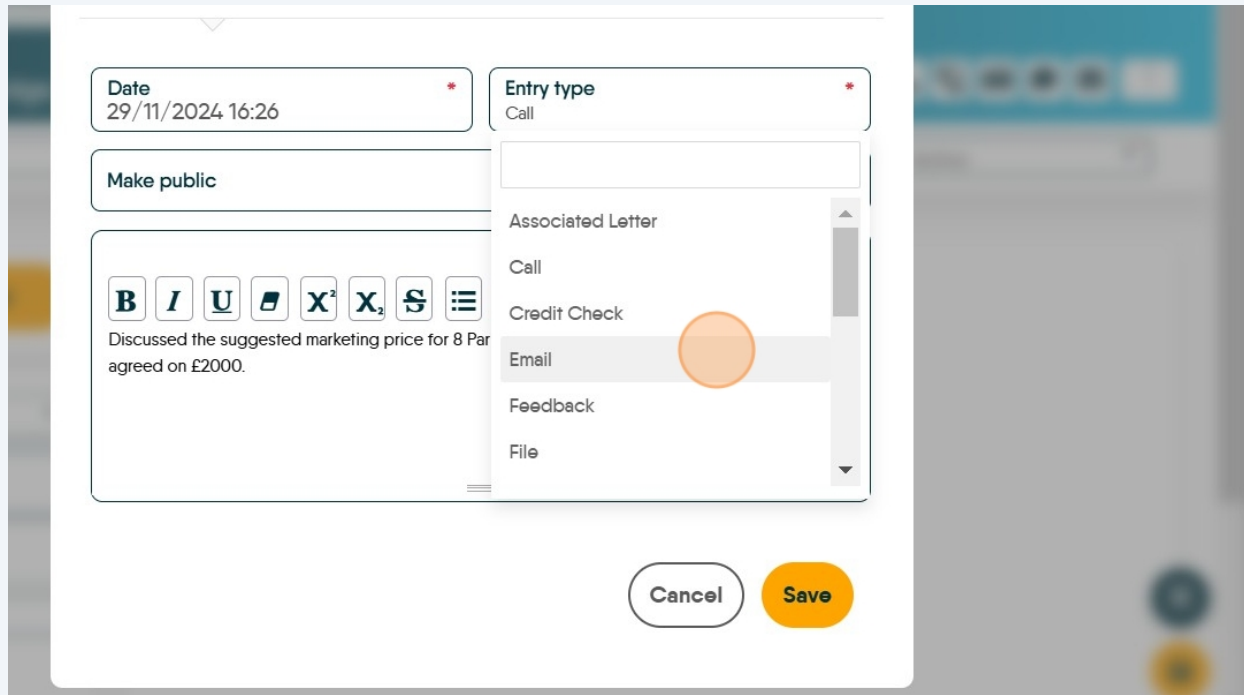
The screenshot shows a form titled 'Add New Journal Entry'. At the top, there are two input fields: 'Date' with the value '29/11/2024 16:26' and 'Entry type' with the value 'Call'. Below these is a 'Make public' toggle switch. The main part of the form is a large text input area with a rich text editor toolbar containing icons for Bold (B), Italic (I), Underline (U), Text color (A), Background color (X), Link (S), and List (ul). A large orange circle is placed in the center of the text input area, indicating where to click to add text. At the bottom right of the form are 'Cancel' and 'Save' buttons.

- 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.

The screenshot shows the same 'Add New Journal Entry' form. The 'Make public' toggle switch is now turned on, and a large orange circle is placed over it, indicating where to click. The text input area now contains the text: 'Discussed the suggested marketing price for 8 Park View Road of between £1800 and £2000 and agreed on £2000.' The 'Cancel' and 'Save' buttons are still at the bottom right.

- 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.



The screenshot shows a journal entry form. On the left, there is a 'Date' field with the value '29/11/2024 16:26', a 'Make public' checkbox, and a rich text editor with formatting icons (B, I, U, A, X², X₂, S, and a list icon). The text in the editor reads: 'Discussed the suggested marketing price for 8 Par agreed on £2000.' On the right, the 'Entry type' dropdown menu is open, showing options: 'Call', 'Associated Letter', 'Credit Check', 'Email' (highlighted with an orange circle), 'Feedback', and 'File'. At the bottom right of the form are 'Cancel' and 'Save' buttons.

- 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



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.

Add New Journal Entry ×

Details Attachments **Records**

Link Record

Landlord

Karlos Fandango

☐ Private

49

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

Add New Journal Entry ×

Details Attachments **Records**

Chris Hemsworth

Link Record

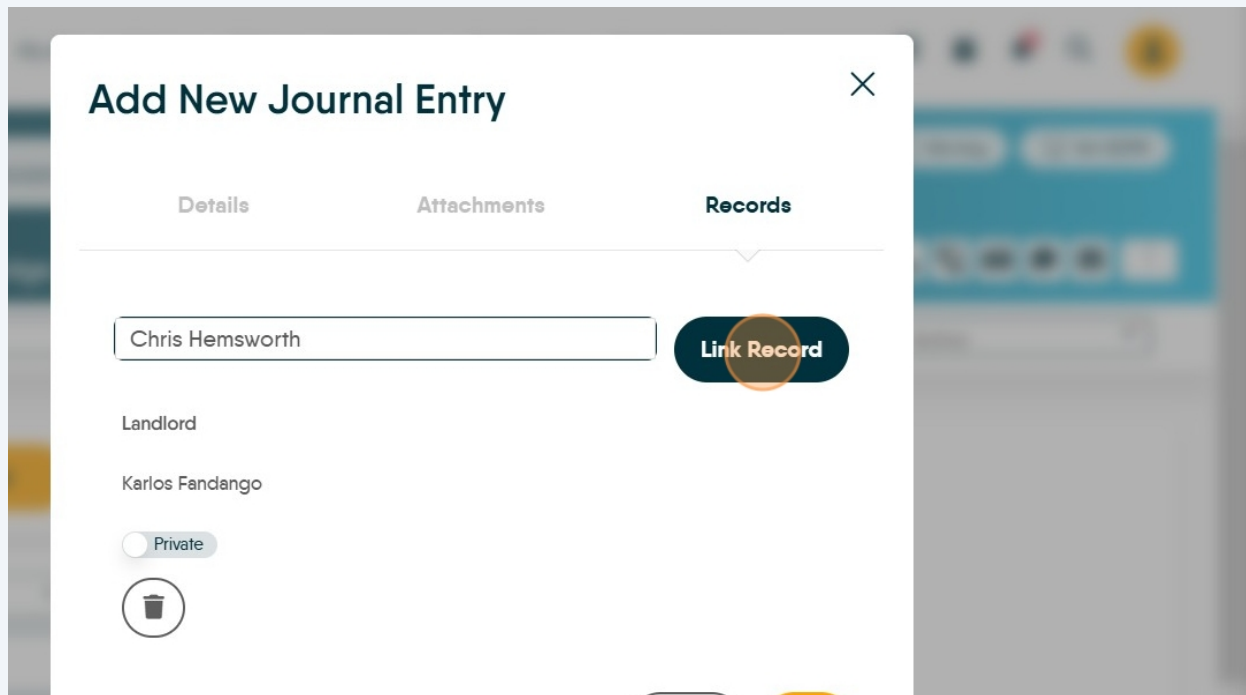
Landlord

Karlos Fandango

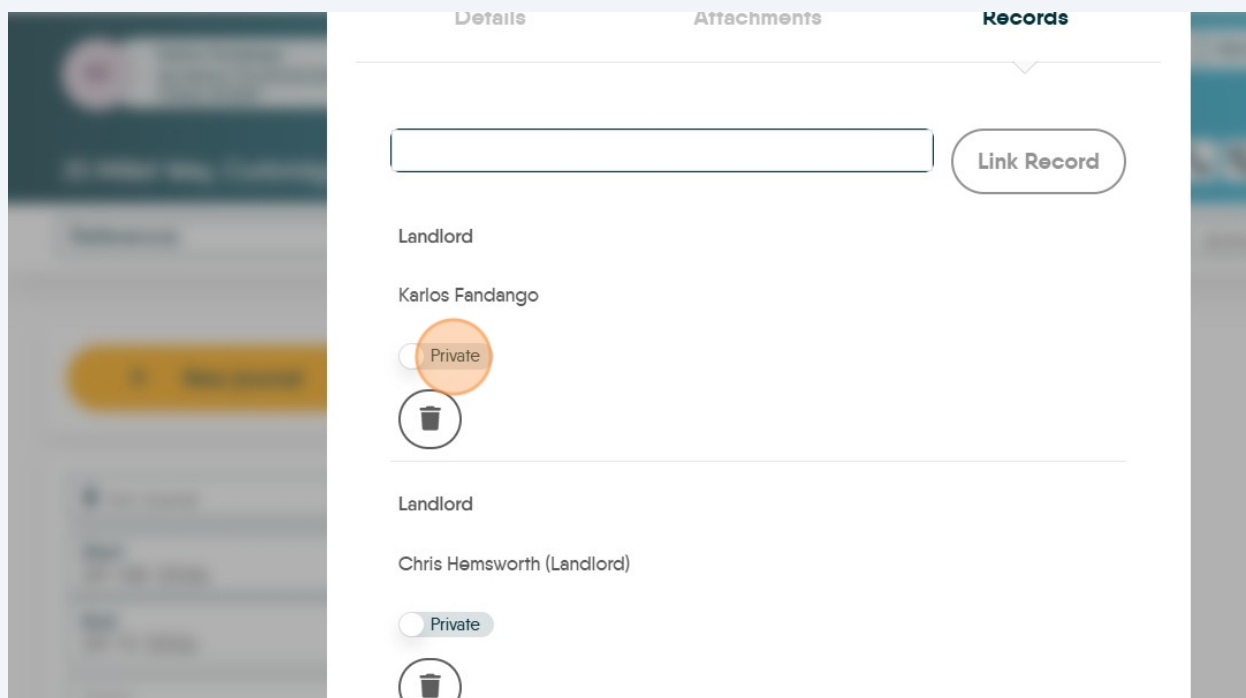
☐ Private

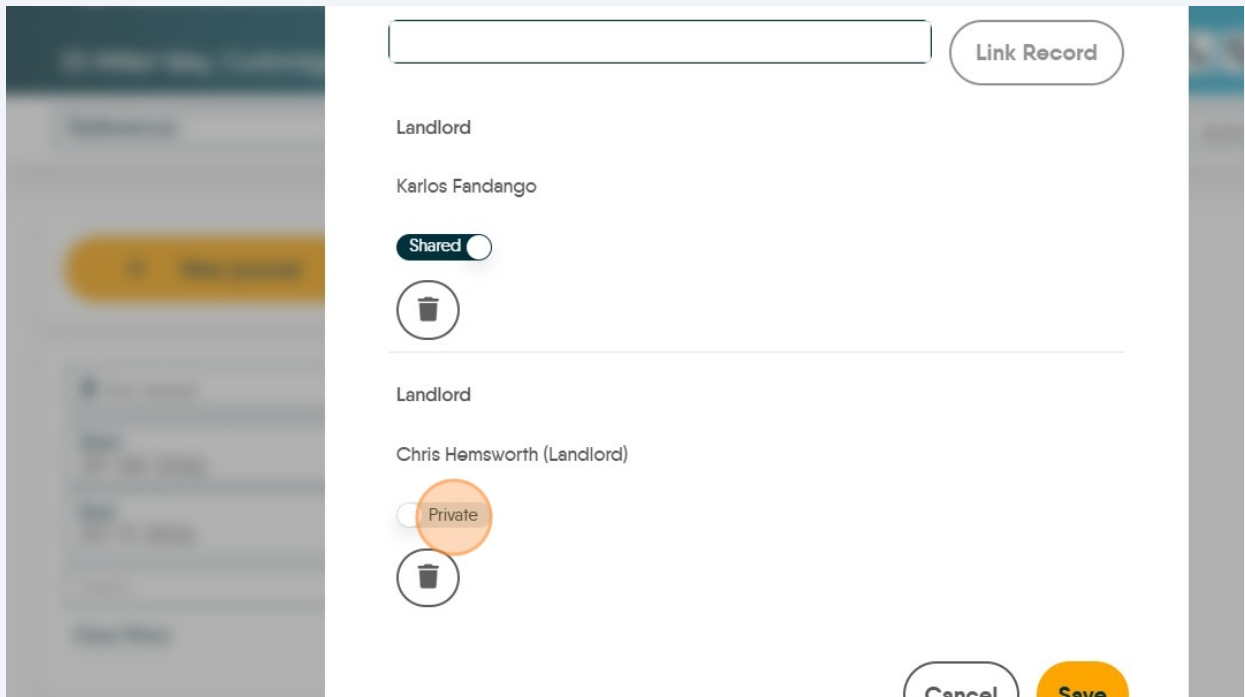
Cancel Save

50 Click "Link Record"

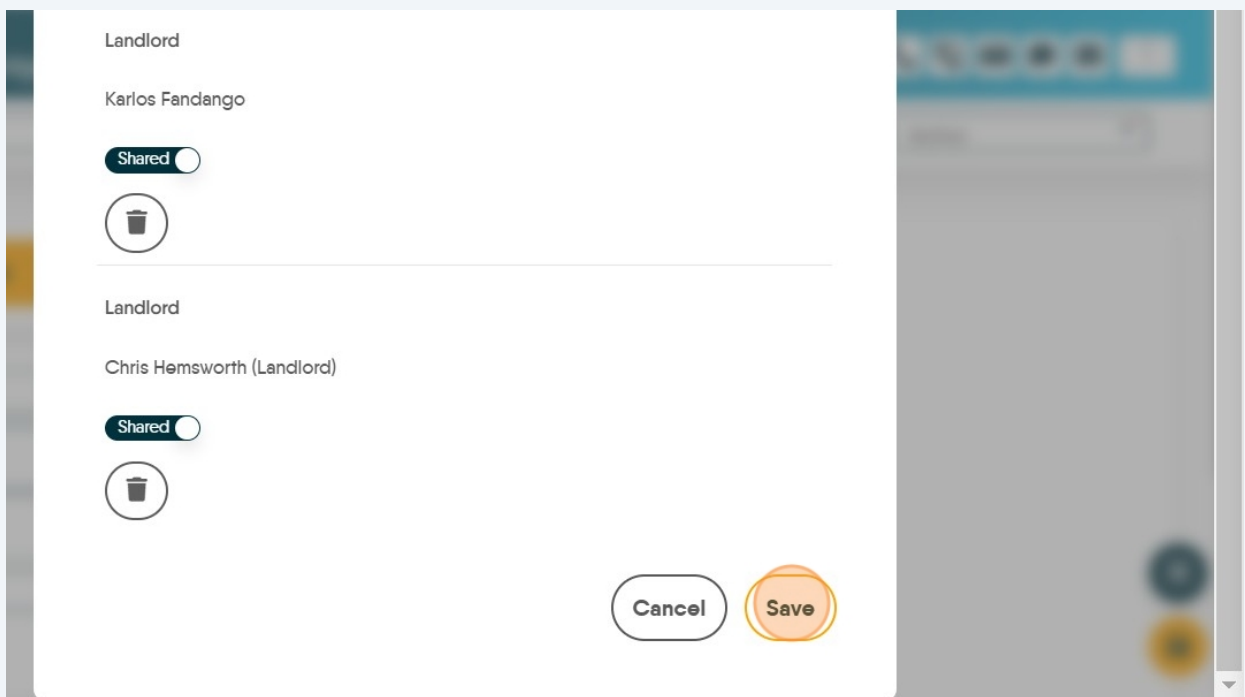


51 Click "Private" to make the Journal entry visible to both records and Client Portals





52 Click "Save"



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

The screenshot shows the E-Sign interface for a property record. On the left is a sidebar with navigation options: Properties, Identity Confirmed, Address Confirmed, Last Contacted, Details, Checklist, Properties, Tenancies, Contacts, Documents (highlighted with an orange circle), Journal, E-Sign, and Audit. The main area displays the property details for '35 Kingsway, Darlington' and the negotiator 'Brooke Morgan'. Below this, there are filters for Reference, Negotiator, Branch, and Status. A '+ Add Document' button is visible. A search bar and 'Sort Documents' dropdown are also present. A list of documents is shown, including 'Screenshot 2025-02-24 104000' and 'Proof Of Identity - 9 KB', with a date of 24/02/2025.

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 the E-Sign tracking interface. The top header displays the property address '35 Kingsway, Darlington' and contact icons. Below the header are filters for Reference, Negotiator, Branch, and Status. On the left, there are filter options for Date Type, Date Range, Search, and Show Cancelled/Show Hidden. The main area contains a table with the following columns: Sender, Letter, Email S..., Status, Created, Sent, Completed, and En... The table lists one document: 'Training D... Landlord Particulars' with a status of 'Created' and a date of '24/02/2025 15...'. An orange circle highlights the document icon in the first row.

Sender	Letter	Email S...	Status	Created	Sent	Completed	En...
Training D...	Landlord Particulars		Created	24/02/2025 15...	-	-	

Audit

55

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

Properties 1

Identity Confirmed ✓

Address Confirmed ✗

Last Contacted

Details

Checklist

Properties

Tenancies

Contacts

Documents

Journal

E-Sign

Audit

BM Brooke Morgan
zagg.dave@gmail.com

35 Kingsway, Darlington

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

Date Type: Date Created

Date Range: 24/02/2024 - 24/02/2025

Search

Clear filters

Show Cancelled

Show Hidden

Sender	Letter	Email S...	Status	Created	Sent	Complete
Training D...	Landlord Particulars		Created	24/02/2025 15...	-	-

View Document

56

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

iamproperty CRM movebutler iamsold

My day Lettings Sales Accounts Reporting Communications

iamproperty

My account

Properties 1

Identity Confirmed ✓

Address Confirmed ✗

Last Contacted

Details

Checklist

Properties

Tenancies

Contacts

Documents

Journal

E-Sign

Audit

BM Brooke Morgan
zagg.dave@gmail.com

35 Kingsway, Darlington

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

Search

Date	User	Field	Old Value	New Value
24/02/2025 14:48:45	Training Dave	Journal Attachments		Screenshot 2025-02-24...
24/02/2025 14:48:45	Training Dave	Screenshot 2025-02-24...		Screenshot 2025-02-24...
24/02/2025 14:48:45	Training Dave	Screenshot 2025-02-24...		Proof of Identity
24/02/2025 12:07:23	Training Dave	Checklist Item (Landlord...	True	False
24/02/2025 12:07:12	Training Dave	Checklist Item (Landlord...	False	True
24/02/2025 11:56:33	Training Dave	Address - Postcode	DL3 8LA	DL1 3ey
24/02/2025 11:56:33	Training Dave	Address - Address Line 1	Barrett Road	Kingsway
24/02/2025 11:56:33	Training Dave	Address - House name / ...	17	35
24/02/2025 11:54:23	Training Dave	Address - Address type	Contact	Correspondence

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.

iamproperty CRM movebutler iamsold					
iamproperty My day Lettings Sales Accounts Reporting Communications					
My account					
Properties	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 11:56:33	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 11:54:23	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.

iampropertyCRMmovebutleriamsold

iamproperty

My dayLettingsSalesAccountsReportingCommunications

KF

Karlos Fandango
ian.henry-17@iamproperty.com
07462 251489

LLVEProspectWarningSet GDPR

25 Millet Way, Curbridge, Witney

Reference:

Negotiator Ian Henry

Branch: Henry & Co

Status: Active

Search

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

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