

Adding User Defined Fields to CRM



This guide provides a step-by-step process for adding User Defined Fields (UDFs) to the Property Tenancy section in a CRM, enhancing data customisation and management.

By following these instructions, users can tailor their system to better reflect their specific needs, such as tracking furniture items associated with tenancies. It simplifies the process of organising information, ultimately improving efficiency and data accuracy in property management.

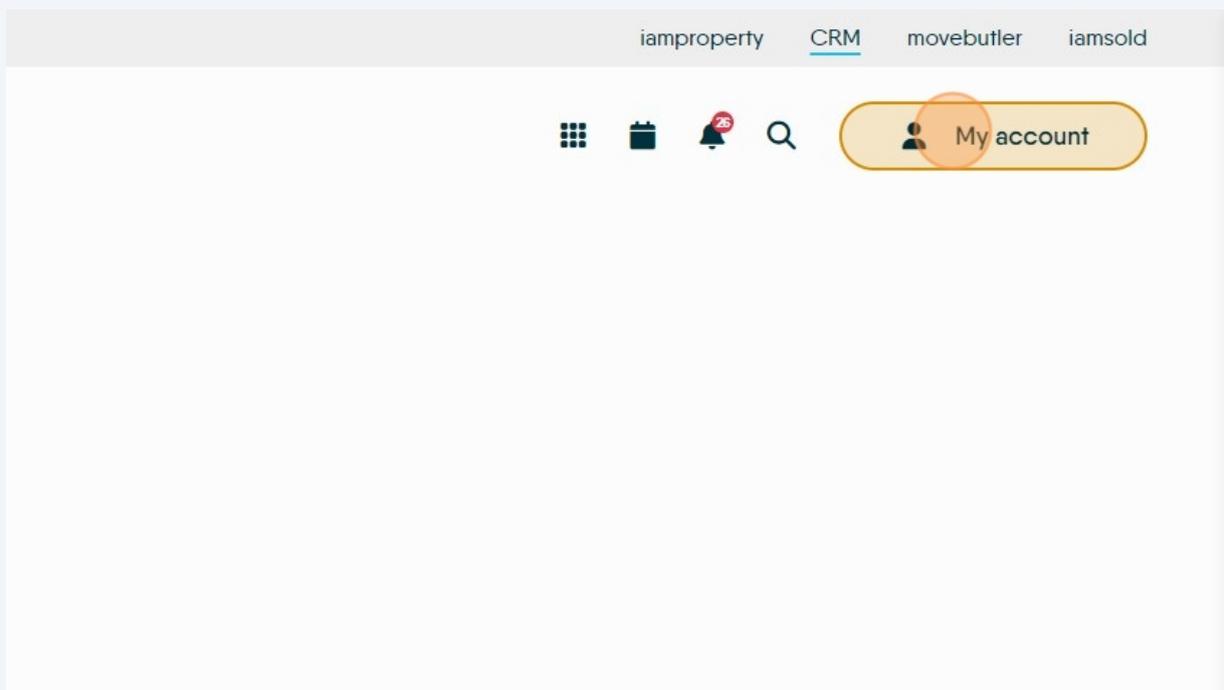


Alert! This guide was created to answer a specific question, tracking the furniture supplied to a Tenant at the start of a Tenancy.

The same process can be used for creating any UDF in CRM.

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

2 Click "My Account" button





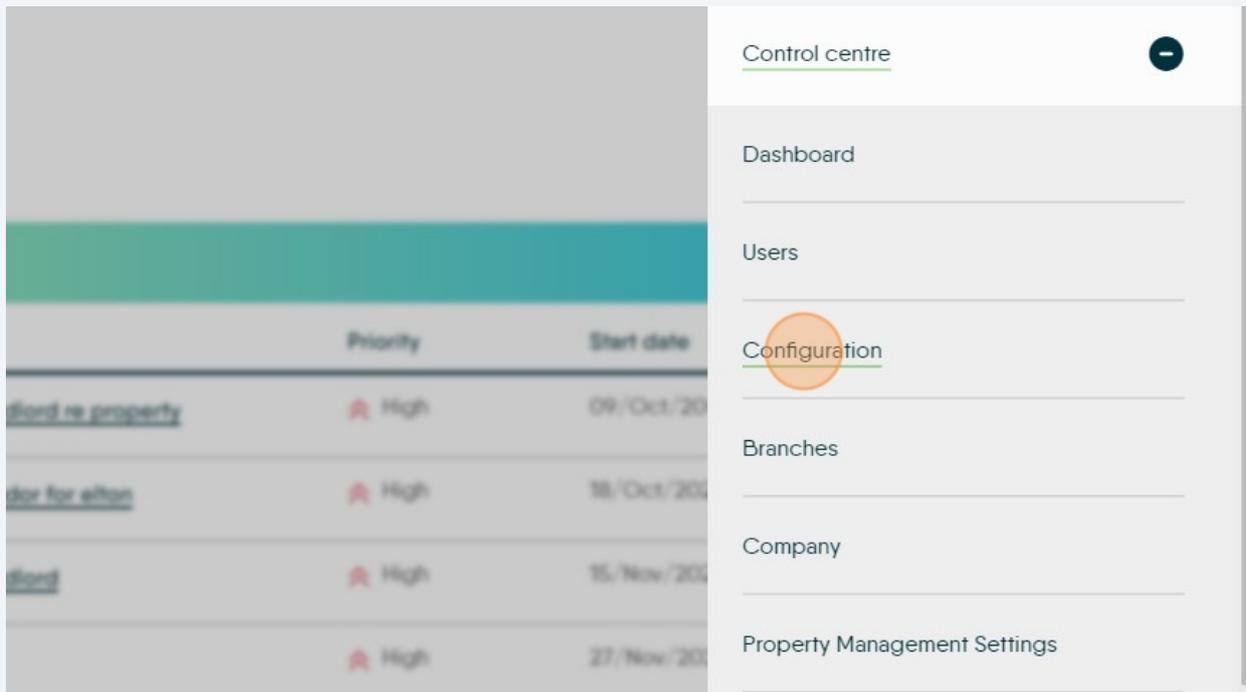
Alert! If 'Control Center' does not show on your 'My Account' then it is disabled by a company policy. Please speak to your System Administrator to have the feature added, or CRM support.

3

Click "Control centre"

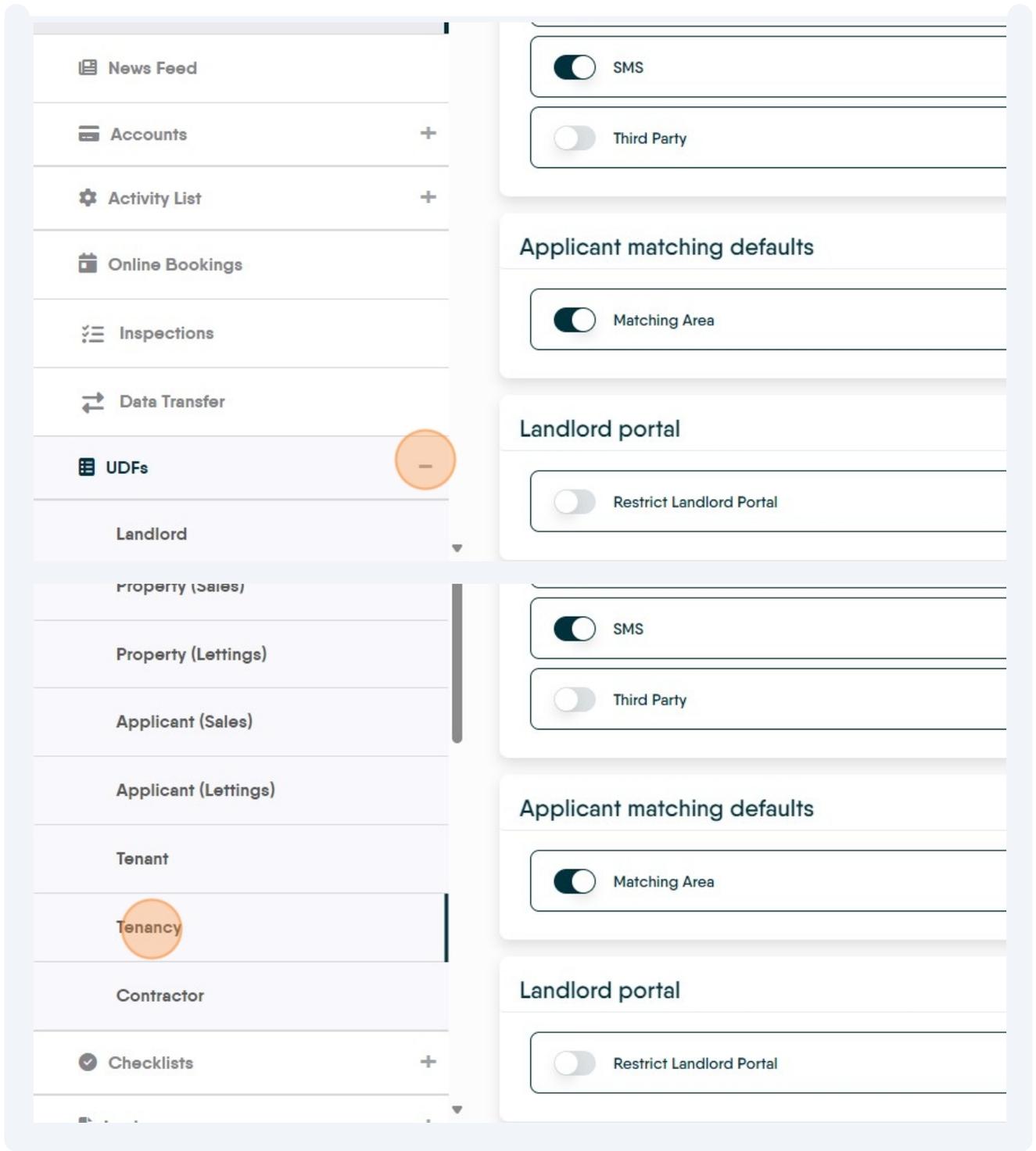
The screenshot shows a user profile page for 'Training Dave' (TD). The page has a white background with a teal header bar. Below the header, there are several menu items: 'Active branches', 'Account settings', 'Control centre', 'Help centre', and 'Log out'. The 'Control centre' link is underlined and has a teal circle with a white plus sign next to it. The background of the page is a light gray color.

4 Click "Configuration"

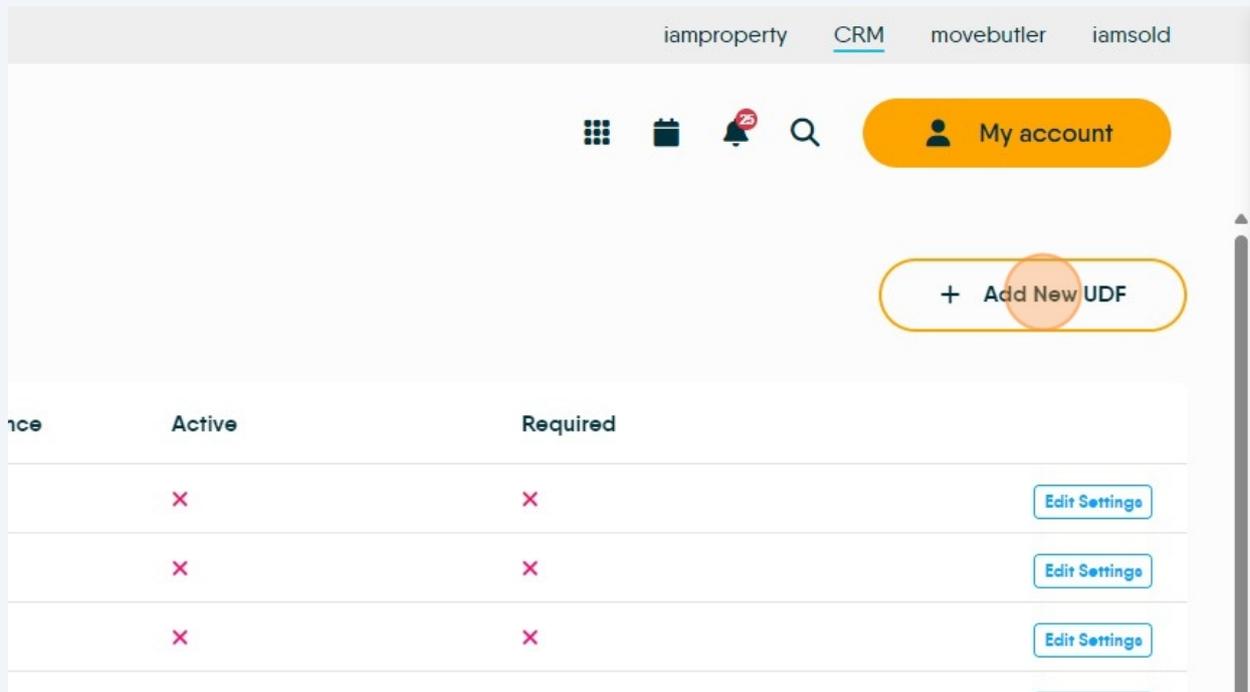


Alert! When **User Defined Fields** are created they will show in the area of CRM you have created the UDF for, so consider where the UDF should appear before creating them. E.G. a UDF created in the Landlord option will show in a Landlord record.

5 From the left hand menu in configuration. Click "UDFs" then scroll down to select the area you wish to add the UDF to. In this case Click "Tenancy"



6 To create the UDF Click "Add New UDF"

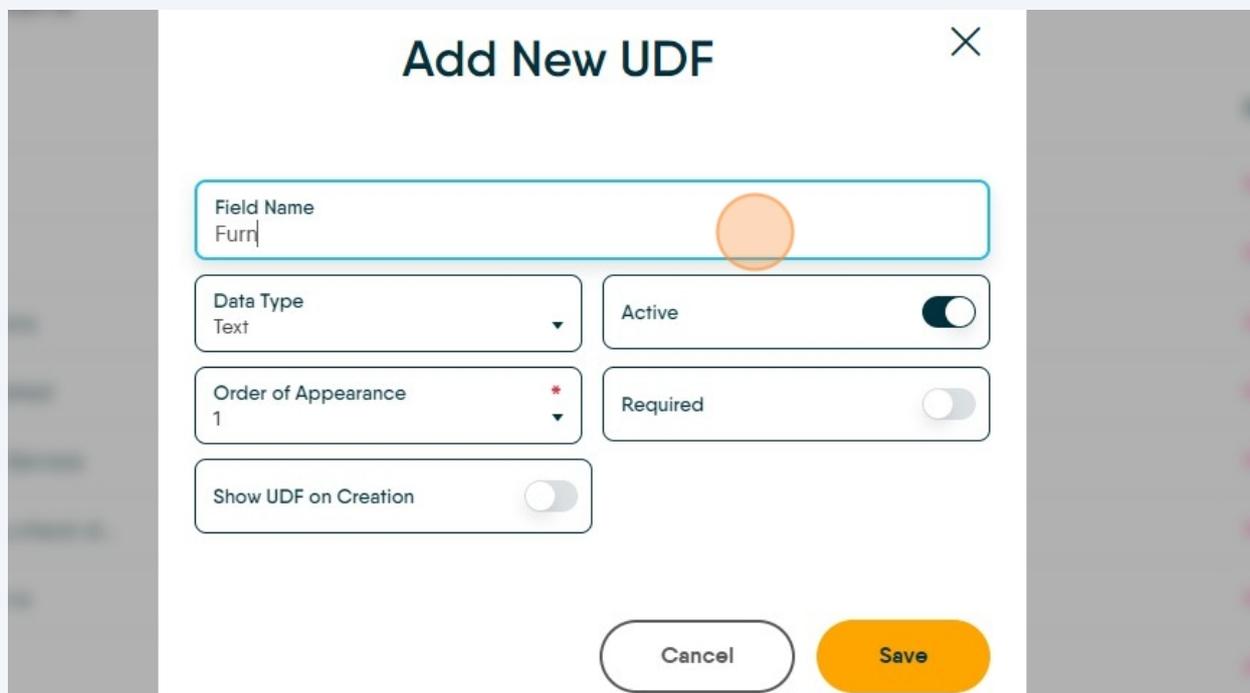


The screenshot shows the CRM interface with the following elements:

- Navigation tabs: iamproperty, CRM (selected), movebutler, iamsold
- Top navigation icons: Grid, Calendar, Notifications (25), Search
- User profile: My account
- Primary action button: + Add New UDF (highlighted with an orange circle)
- Table with columns: Name, Active, Required, and an Edit Settings button for each row.

Name	Active	Required	
	×	×	Edit Settings
	×	×	Edit Settings
	×	×	Edit Settings

7 Click the "Field Name" field. Name your UDF



The screenshot shows the 'Add New UDF' modal form with the following fields and controls:

- Field Name: Furn (highlighted with an orange circle)
- Data Type: Text
- Active:
- Order of Appearance: 1
- Required:
- Show UDF on Creation:
- Buttons: Cancel, Save

8 Click into the Data Type box to set what type of data can be added using this UDF.

There are a few options to pick from.

The screenshot shows a dialog box titled "Add New UDF" with a close button (X) in the top right corner. The "Field Name" is "Furniture Supplied to Property". The "Data Type" is currently set to "Text", and a dropdown menu is open, showing options: Text, Number, Date, DateTime, Decimal, and Money. The "Active" toggle is turned on, and the "Required" toggle is turned off. There are "Cancel" and "Save" buttons at the bottom.

9 for example click "Multi Select List"

With a list or multi select list, the list options need to be added. To do this click the green + icon and add the items. (see below for guide)

The screenshot shows the "Add New UDF" dialog box with the "Data Type" set to "Multi Select List". The "Order of Appearance" is "1". The "Active" toggle is turned on, and the "Required" toggle is turned off. The "Show UDF on Creation" toggle is turned off. There is an "Options" field with a green + icon. There are "Cancel" and "Save" buttons at the bottom.

10 Click here to show the UDF.

The screenshot shows a configuration modal for a field. The field name is "Furniture Supplied to Property". The data type is "Multi Select List". The field is currently active and required. The "Show UDF on Creation" toggle is highlighted with an orange circle, indicating it should be clicked. Below the main settings is an "Options" section with a plus icon to add more options. At the bottom are "Cancel" and "Save" buttons.

Field Name Furniture Supplied to Property	
Data Type Multi Select List	Active <input checked="" type="checkbox"/>
Order of Appearance 1	Required <input type="checkbox"/>
Show UDF on Creation <input checked="" type="checkbox"/>	
Options <input type="button" value="+"/>	
Cancel Save	

11 Click here to make the UDF mandatory/required for all users.

N.B. this will affect all CRM records in the UDF category, accessing an old record will require an answer to this question the same as accessing a newly created record.

The screenshot shows the 'Add New UDF' form. The 'Field Name' is 'Furniture Supplied to Property'. The 'Data Type' is 'Multi Select List'. The 'Active' toggle is turned on. The 'Order of Appearance' is '1'. The 'Required' toggle is turned on and highlighted with an orange circle. The 'Show UDF on Creation' toggle is turned on. Below these is an 'Options' section with a text input field containing '=' and a green '+' icon to its right. At the bottom are 'Cancel' and 'Save' buttons.

Adding Select/Multi Select Questions.

12 Click the green +. In the field below type the question and repeat.
Click here to save the question. Click the + to add the next question.
Add the next question
Click here.

Data Type
Multi Select List

Active

Order of Appearance
1

Required

Show UDF on Creation

Options

Options list: [Empty]

Cancel Save

Multi Select List

Active

Order of Appearance
1

Required

Show UDF on Creation

Options

Options list: Bed Set

Options list: [Empty]

Cancel Save

Data Type
Multi Select List

Active

Order of Appearance
1

Required

Show UDF on Creation

Options +

Bed Set	
	<input type="checkbox"/>

Cancel **Save**

Data Type
Multi Select List

Active

Order of Appearance
1

Required

Show UDF on Creation

Options +

Bed Set	
Wardrobe	<input checked="" type="checkbox"/>
	<input type="checkbox"/>

Cancel **Save**

Data Type
Multi Select List

Active

Order of Appearance
1

Required

Show UDF on Creation

Options +

=	Bed Set
=	Wardrobe
=	Drawers

Cancel Save

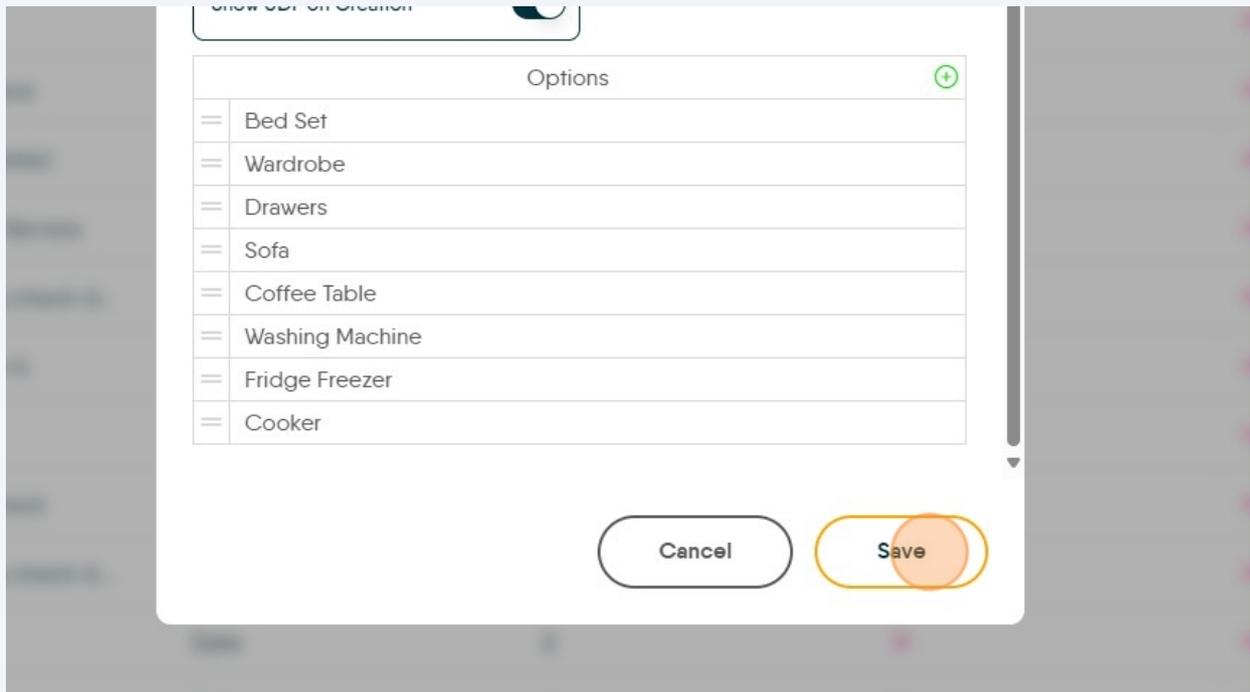
13

To edit or delete a question. Click here and select the 'Bin' to delete or the 'pencil' icon to edit.

=	wardrobe	
=	Drawers	
=	Sofa	
=	Coffee Table	
=	Washing Machine	
=	Fridge Freezer	
=	Cooker	

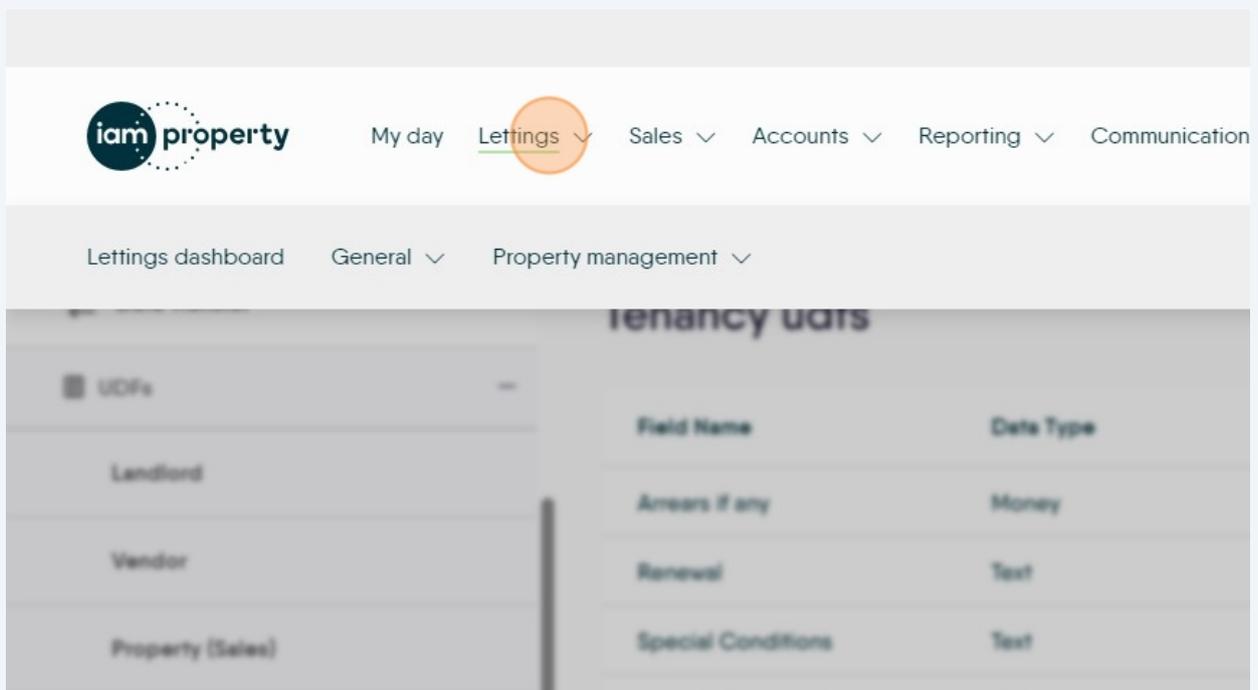
Cancel Save

14 Once complete and all questions are added, click "Save".



To Use the UDF

15 Click "Lettings"



16 Click "Lettings"

The screenshot shows the iamproperty CRM dashboard. The top navigation bar includes the iamproperty logo, a 'My day' dropdown, and a 'Lettings' dropdown which is highlighted with an orange circle. Other navigation items include Sales, Accounts, Reporting, and Communications. On the right, there are icons for a grid, calendar, notifications, and search, along with a 'My acc' profile button. The main content area features a large 'Welcome back, Training' heading, three action buttons ('Add New Record', 'View Property Management', 'Visit Help Centre'), a search bar, and two panels: 'Today's events' and 'My tasks'.

Time	Name
12:00	Test test

Status	Name	Priority	Start date	Due date
☐ Not Started	<u>Call Landlord</u>	🔥 High	15/Nov/2024	15/Nov/2024
☐ Not Started	test	🔥 High	27/Nov/2024	27/Nov/2024
☐ Not Started	Call Landlord	🟡 Medium	12/Dec/2024	12/Dec/2024

17 Click "General"

This screenshot is identical to the previous one, showing the iamproperty CRM dashboard. In this view, the 'General' dropdown menu under 'Lettings' is highlighted with an orange circle. The rest of the interface, including the 'Welcome back, Training' heading, action buttons, search bar, and data tables, remains the same.

Time	Name
12:00	Test test

Status	Name	Priority	Start date	Due date
☐ Not Started	<u>Call Landlord</u>	🔥 High	15/Nov/2024	15/Nov/2024
☐ Not Started	test	🔥 High	27/Nov/2024	27/Nov/2024
☐ Not Started	Call Landlord	🟡 Medium	12/Dec/2024	12/Dec/2024

18 Click "Tenants"

The screenshot shows a dashboard with a top navigation bar containing 'Lettings dashboard', 'General', and 'Property management'. Below this is a large blue header labeled 'General'. The main content area is divided into four columns: 'Property Match', 'Properties', 'Applicants', and 'Reports'. Under 'Properties', the 'Tenants' link is circled in orange. Below the columns is a table with columns for status, action, priority, and dates.

Status	Action	Priority	Start Date	End Date
Not Started	Test	High	27/Nov/2024	27/Nov/2024
Not Started	Call Landlord	Medium	12/Dec/2024	12/Dec/2024
Not Started	Call back	High	03/Jan/2025	03/Jan/2025
Not Started	Make Tea	High	07/Jan/2025	07/Jan/2025

19 Click "View Tenant"

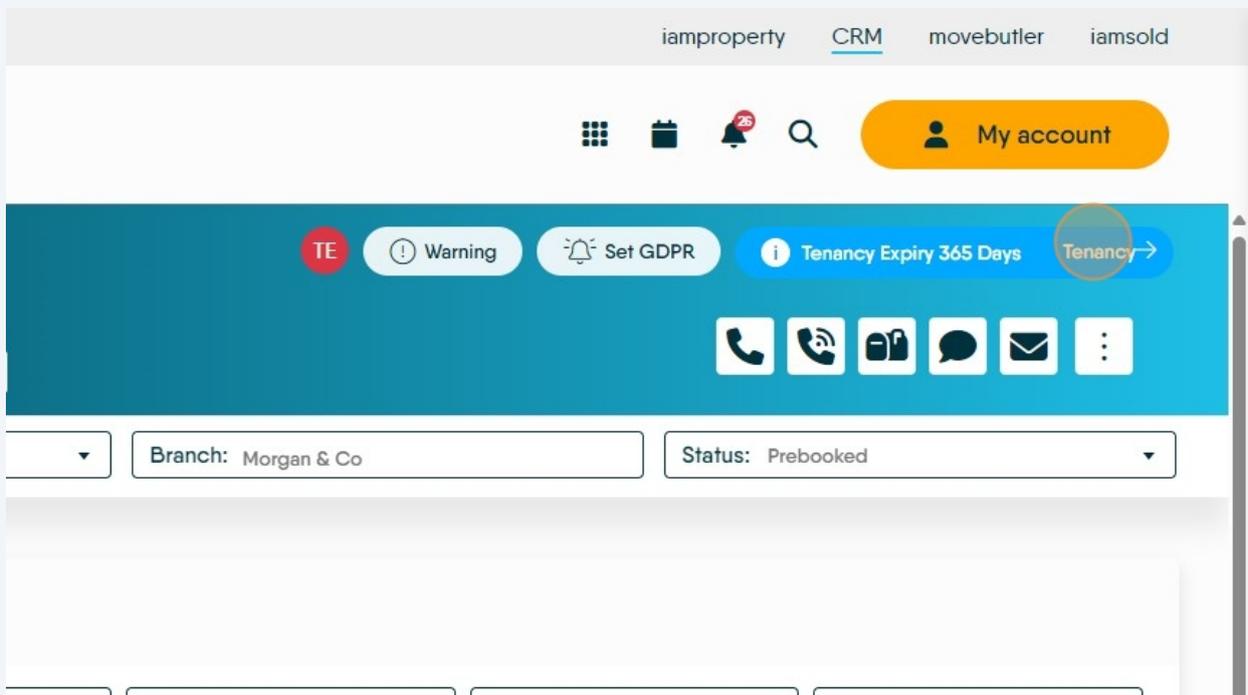
The screenshot shows a 'View your tenants' page with a search bar and a list of tenant cards. The 'View Tenant' button on the rightmost card is circled in orange.

Search in Tenants Archived Prebooked

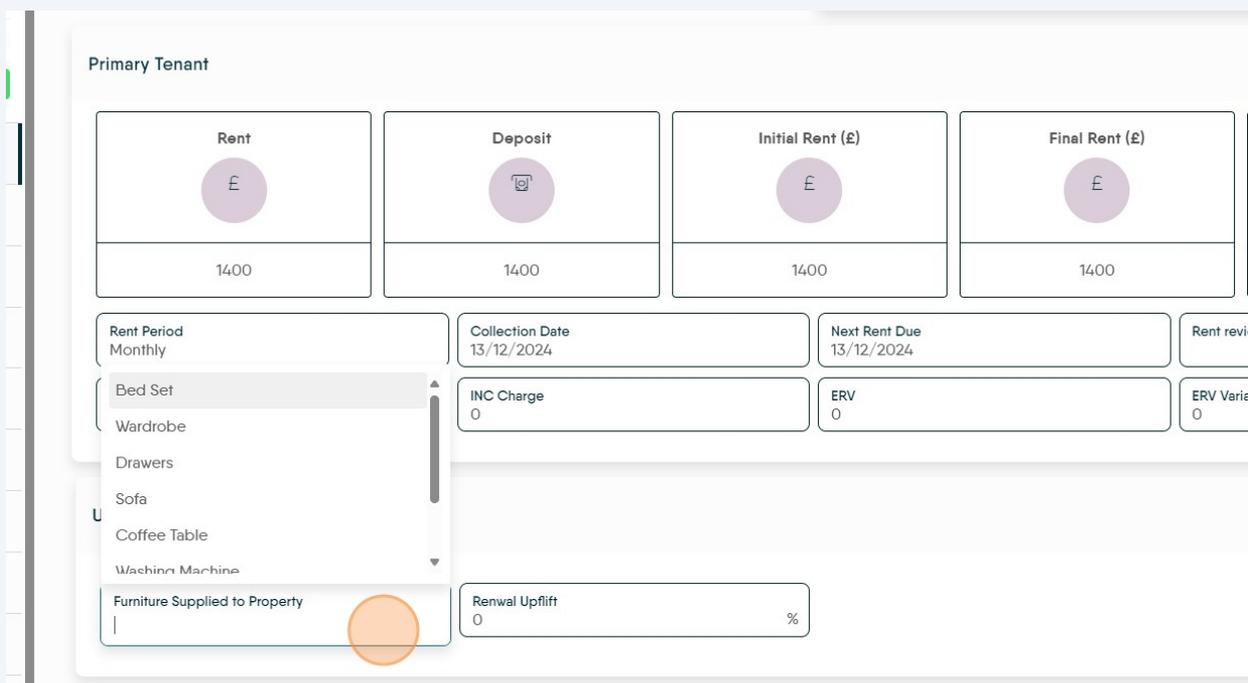
Most Added Favourites

Card ID	Initials	Status	Address	Action
applicant140	a		17 Yew Tree Close, Hurworth, Darlington, Durham, DL2 2HX, UK	View Prebooked Tenant
Ms Lettings Applicant137	IA	PB	17 Yew Tree Close, Hurworth, Darlington, Durham, DL2 2HX, UK	View Prebooked Tenant
Ms Lettings Applicant136	LA	PB	162 Yew Tree Close, Hurworth, Darlington, Durham, DL2 2HX, UK	View Prebooked Tenant
Ms Lettings Applicant136	LA		715 Pelaw Crescent, Chester le Street, County Durham, DH2 2HX, UK	View Tenant

20 Click "Tenancy"



21 Once in the Tenancy record the UDF will show at the bottom of the 'Details' screen



22 Click into the field and in this case select from the Multi select list.

The screenshot shows a software interface with a sidebar on the left containing menu items: Tenants, Checklist, Renewals Checklist, Compliance, Rent Insurance, Information, Documents, and Journal. The main content area displays a form with several fields. At the top, there are two input fields, each containing the value '1400'. Below these, there are four fields: 'Rent Period' with the value 'Monthly', 'Collection Date' with the value '13/12/2024', 'INC Charge' with the value '0', and 'Renwal Upflift' with the value '0'. A dropdown menu is open for the 'Furniture Supplied to Property' field, showing a list of items: Bed Set, Wardrobe, Drawers, Sofa, Coffee Table, and Washing Machine. The 'Bed Set' option is highlighted with an orange circle.

23 In this scenario we can click back in and pick a second option.

The screenshot shows the same software interface as in the previous image. The 'Furniture Supplied to Property' field now displays 'Bed Set' with a close button (X) next to it. The 'Renwal Upflift' field still shows '0'. The sidebar on the left is partially visible, showing the 'Documents' and 'Journal' items. The 'User Defined Fields' section is also visible, containing the 'Furniture Supplied to Property' and 'Renwal Upflift' fields.

24 Click "Wardrobe"

Tenants

Checklist

Renewals Checklist

Compliance

Rent Insurance

Information

Documents

Journal

1400

1400

Rent Period
Monthly

Collection Date
13/12/2024

Bed Set

Wardrobe

Drawers

Sofa

Coffee Table

Washing Machine

INC Charge
0

Furniture Supplied to Property

Bed Set X

Renwal Upflift
0

25 Both selections will show.

1400

1400

Rent Period
Monthly

Collection Date
13/12/2024

Bed Set

Wardrobe

Drawers

Sofa

Coffee Table

Washing Machine

INC Charge
0

Furniture Supplied to Property

Bed Set X Wardrobe X

Renwal Upflift
0