

# Updating 'Lookups' in iamproperty CRM

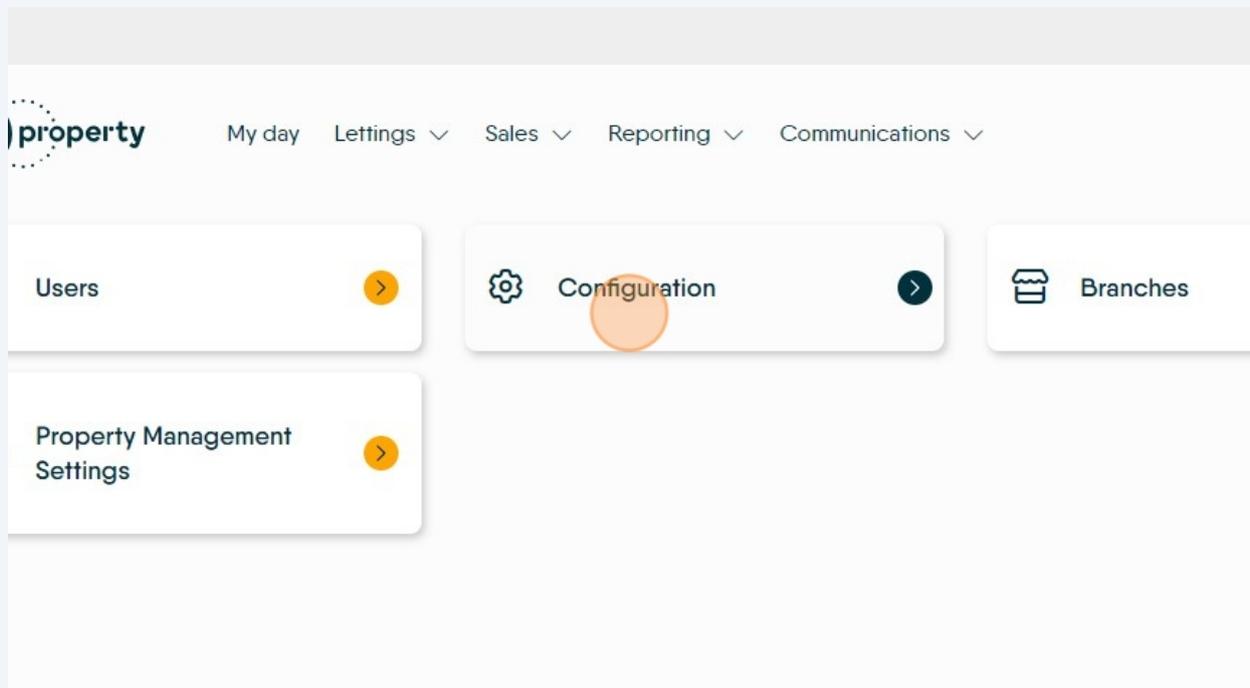


This guide provides a straightforward method for updating and adding to lookups by adding new status, improving the accuracy and usability of your property management system. Lookups are the drop down menus used in areas of the CRM

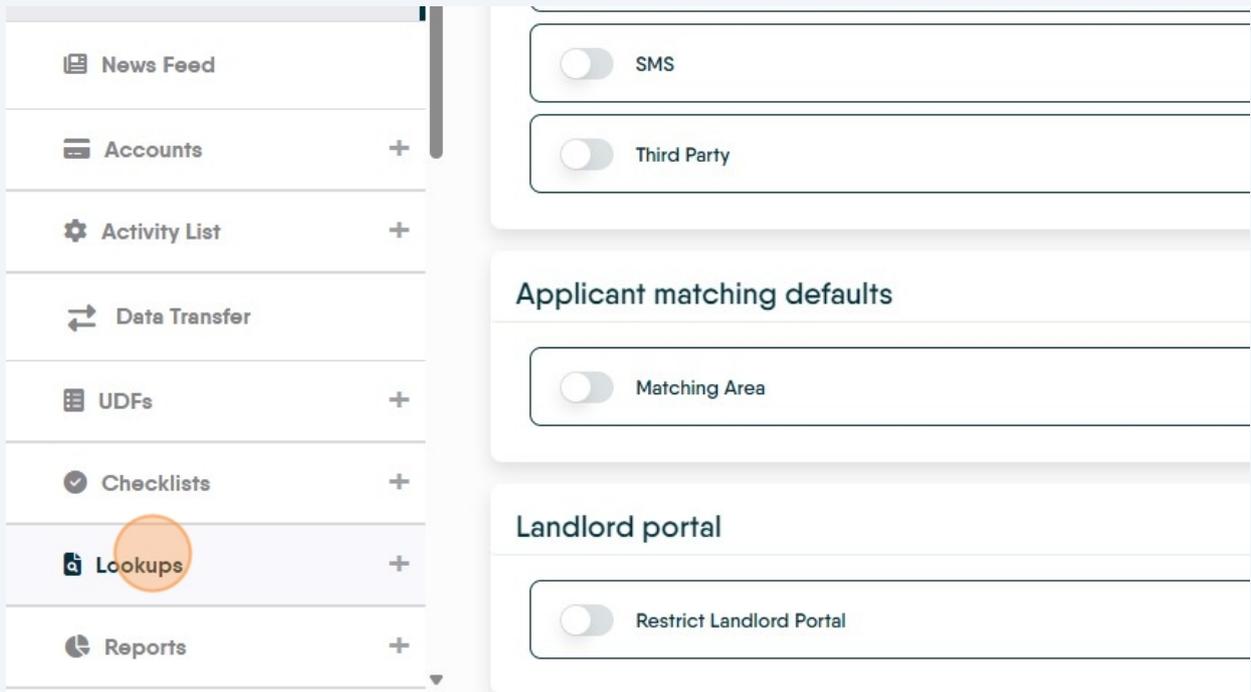
This guide will look at adding a Lookup to a Sales Property, however the process is the same for all CRM lookups. Following the steps outlined will ensure that users can easily identify sold properties, facilitating better decision-making and reporting.

- 1 Navigate to <https://crm.iamproperty.com/Dashboards/ControlCentre>

- 2 Click "Configuration"



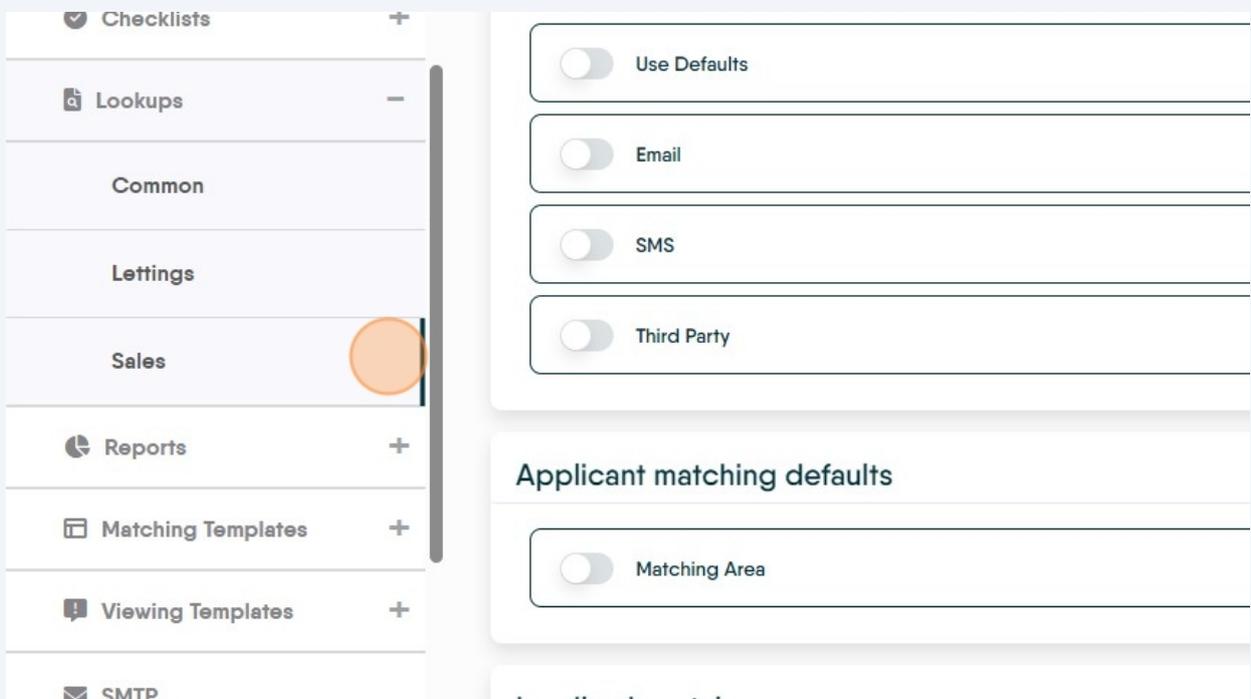
3 Click "Lookups"



The screenshot shows a settings interface. On the left is a vertical menu with items: News Feed, Accounts, Activity List, Data Transfer, UDFs, Checklists, Lookups (highlighted in purple and circled in orange), and Reports. On the right, there are three sections of settings, each with a toggle switch:

- SMS**: Toggle is off.
- Third Party**: Toggle is off.
- Applicant matching defaults**:
  - Matching Area**: Toggle is off.
- Landlord portal**:
  - Restrict Landlord Portal**: Toggle is off.

4 There are 3 options in 'Lookups' Common (for menus that are across the whole of CRM) Lettings and Sales. In this case we click "Sales"



The screenshot shows the 'Lookups' settings page with 'Sales' selected in the left sidebar. The sidebar menu includes: Checklists, Lookups (expanded), Common, Lettings, Sales (highlighted in purple and circled in orange), Reports, Matching Templates, Viewing Templates, and SMTP. The main content area has four sections of settings, each with a toggle switch:

- Use Defaults**: Toggle is off.
- Email**: Toggle is off.
- SMS**: Toggle is off.
- Third Party**: Toggle is off.
- Applicant matching defaults**:
  - Matching Area**: Toggle is off.

5

Click "Select a Lookup" there are multiple options in the list, select the option you want to edit. **n.b.** you cannot add a new lookup option.

The screenshot shows the 'iam property' interface. The top navigation bar includes 'My day', 'Lettings', 'Sales', 'Reporting', and 'Communications'. The left sidebar contains 'Activity List', 'Data Transfer', 'UDFs', 'Checklists', 'Lookups', 'Common', and 'Lettings'. The main content area is titled 'Sales lookups' and contains a search bar and a list of lookup options: 'Price Prefix', 'Tenure', 'Property Statuses', and 'Applicant Buyer Position'. An orange circle highlights the 'Select a Lookup' text above the search bar.

6

As an example. Click "Property Statuses"

This screenshot is similar to the previous one but shows the 'Sales' category selected in the left sidebar. In the 'Sales lookups' list, 'Property Statuses' is highlighted with an orange circle. At the bottom of the list, there are two buttons: 'Add' and 'Add All'.

7 Click "add new Lookup"

Save Option

**+ Add New Lookup**

Selected Options:

- Live
- Under Offer
- Sold Subject to Contract

8 Click this text field and give your new lookup a name.

### Sales lookups

Select a Lookup to Edit  
Property Statuses

Please, fill the fields to add a custom option

Label Name

Cancel

9

Click "Save Option" you can create and save multiple options at a time.

Select a Lookup to Edit  
Property Statuses

Please, fill the fields to add a custom option

Label Name  
Sold

Cancel

Save Option



Tip! If you open a 'Lookup' option and there are already options showing in the left side 'Options Available' select the options you wish to add and click on 'Add' or 'Add All'

10

To activate all the newly created menu options. Click "Add All" to only activate one, select the option to add and click on 'Add'

The screenshot shows a web interface for managing 'Sales lookups'. On the left is a sidebar menu with categories like 'Data Transfer', 'UDFs', 'Checklists', 'Lookups', 'Common', 'Lettings', 'Sales', 'Reports', 'Matching Templates', 'Viewing Templates', 'SMTP', 'SMS', and 'Letters'. The 'Sales' category is selected. The main area is titled 'Sales lookups' and contains a search bar, a table with 'Options Available' and 'Selected Options' columns, and a bottom row of buttons: 'Add', 'Add All', 'Remove', and 'Remove All'. The 'Add All' button is highlighted with a blue background and a red circle.



Tip! This will make the Lookup available for all users, in that Branch, as soon as the lookup is created. If there are multiple branches then the lookup needs to be created for each branch.