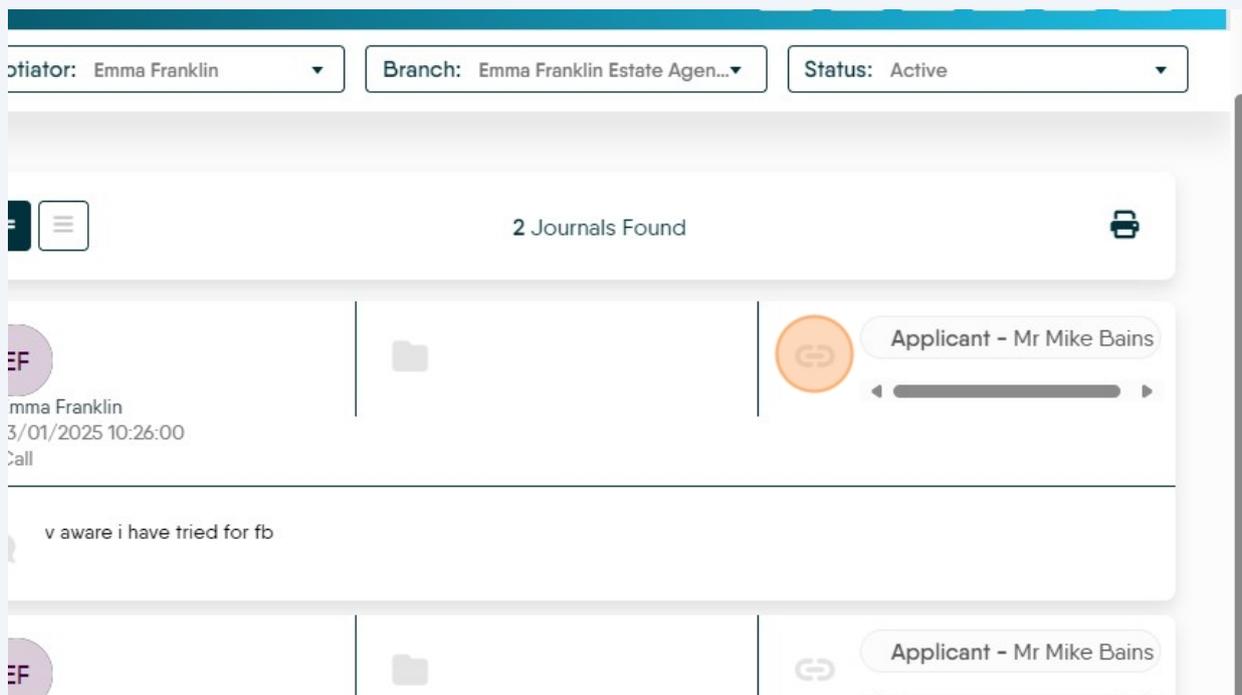# Linking Journal Entries in CRM

This guide provides a straightforward method for linking journal entries in the CRM system, ensuring that users can efficiently connect relevant property records to their entries.

It is particularly beneficial for those managing multiple properties, as it simplifies the process of tracking interactions and notes associated with specific listings.
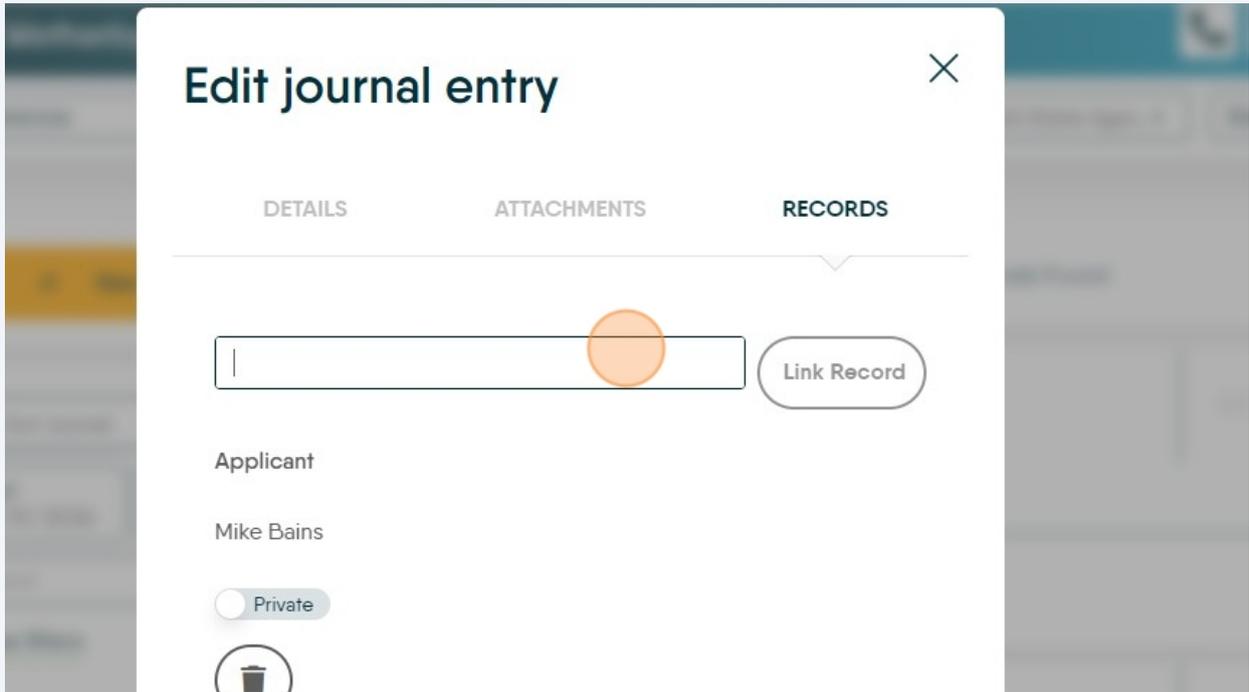
1   Navigate to **https://crm.iamproperty.com/myday** then navigate to the journal of one of the records you are linking.

2   Navigate to the Journal menu, on the journal you wish to link. Click here.
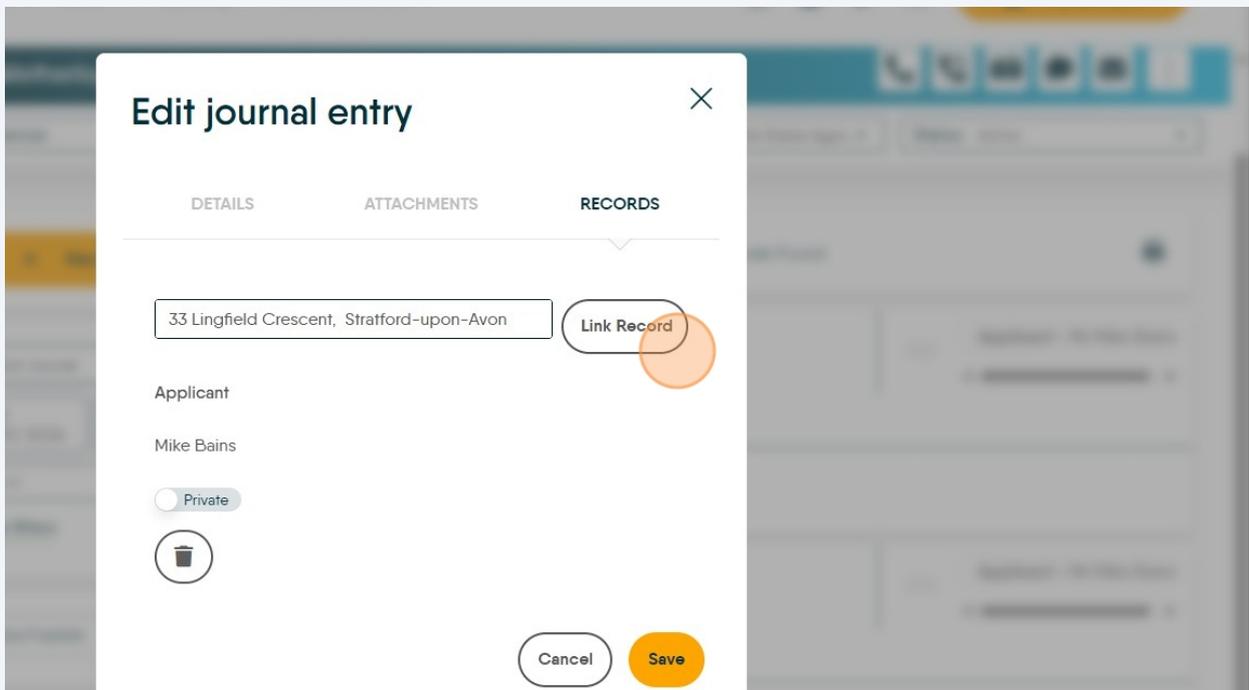
3 In this text field enter the name of the person or property you are linking. Then from the list shown, pick the record you are linking to.
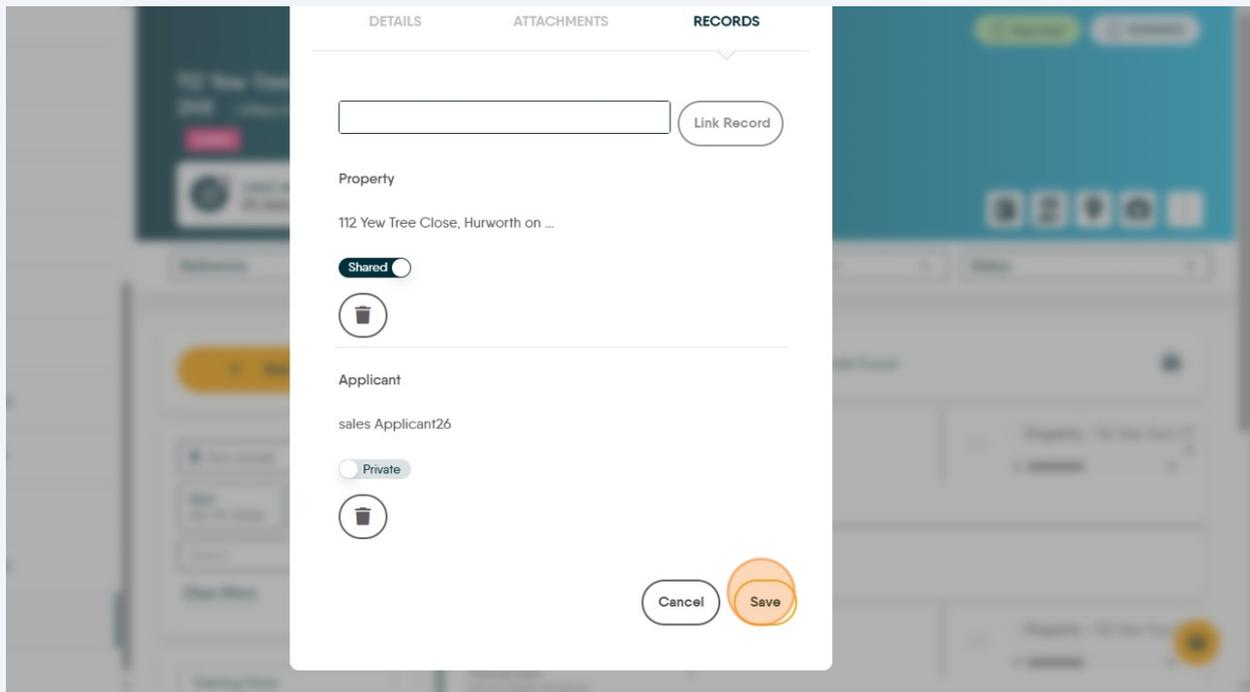
Edit journal entry

DETAILS   ATTACHMENTS   **RECORDS**

Link Record

Applicant

Mike Bains

◯ Private

🗑

4 Click here.

Edit journal entry

DETAILS   ATTACHMENTS   **RECORDS**

33 Lingfield Crescent, Stratford-upon-Avon   Link Record

Applicant

Mike Bains

◯ Private

🗑

Cancel   Save

5 The record will be linked and will show on the screen. Click "Save"

ℹ️ Tip! The shared/private toggle restricts whether the linked journal can be seen in any associated Client Portal.