

# Adding a Sales Applicant Record in CRM



This guide provides a step-by-step process for adding a Sales Applicant record in the CRM system.

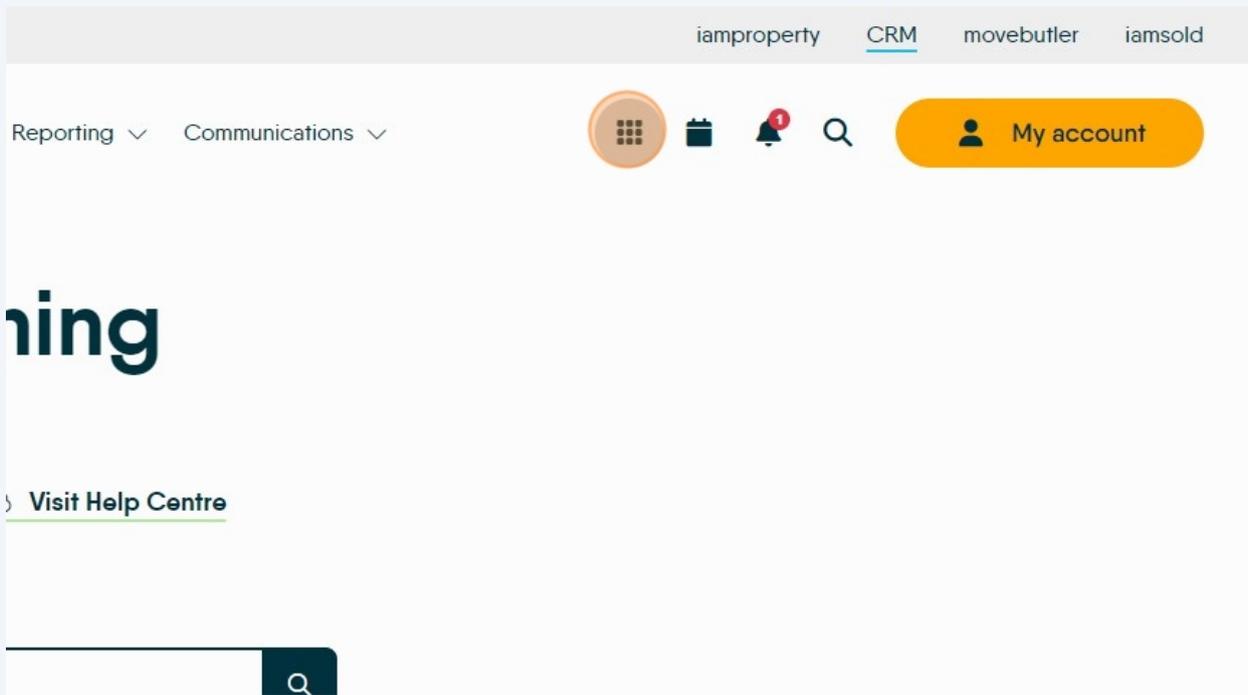
By following this detailed instruction, users can ensure accuracy and completeness in their data entry, which is crucial for effective sales tracking and customer relationship management.

The guide is particularly beneficial for new users or those unfamiliar with the CRM interface, helping them navigate the system with confidence.

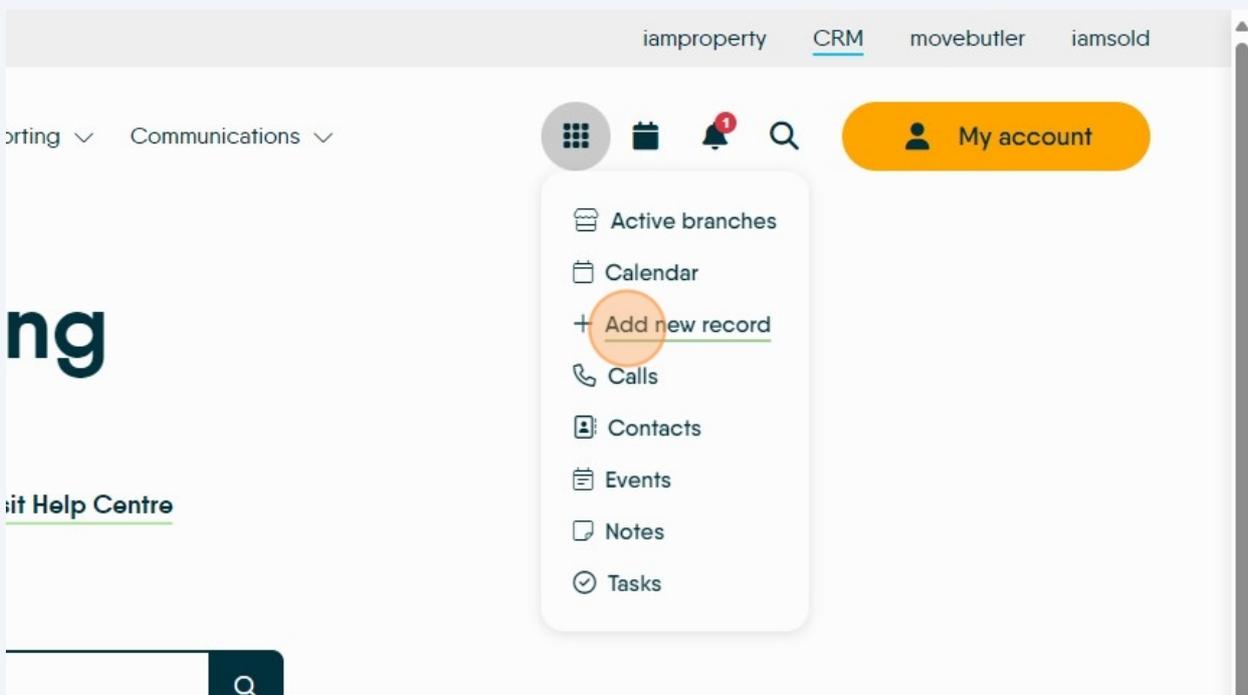
**1** Navigate to <https://crm.iamproperty.com/MyDay>

**i** Tip! When creating a new applicant record, if there are 2 applicants e.g. Mr&Mrs, Mr&Miss etc, it is best practice to create 2 separate applicant records and link the applicants via the link applicants option. This allows easier compliance checking through movebutler.

2 Click "More Actions" aka the 'Bento' menu

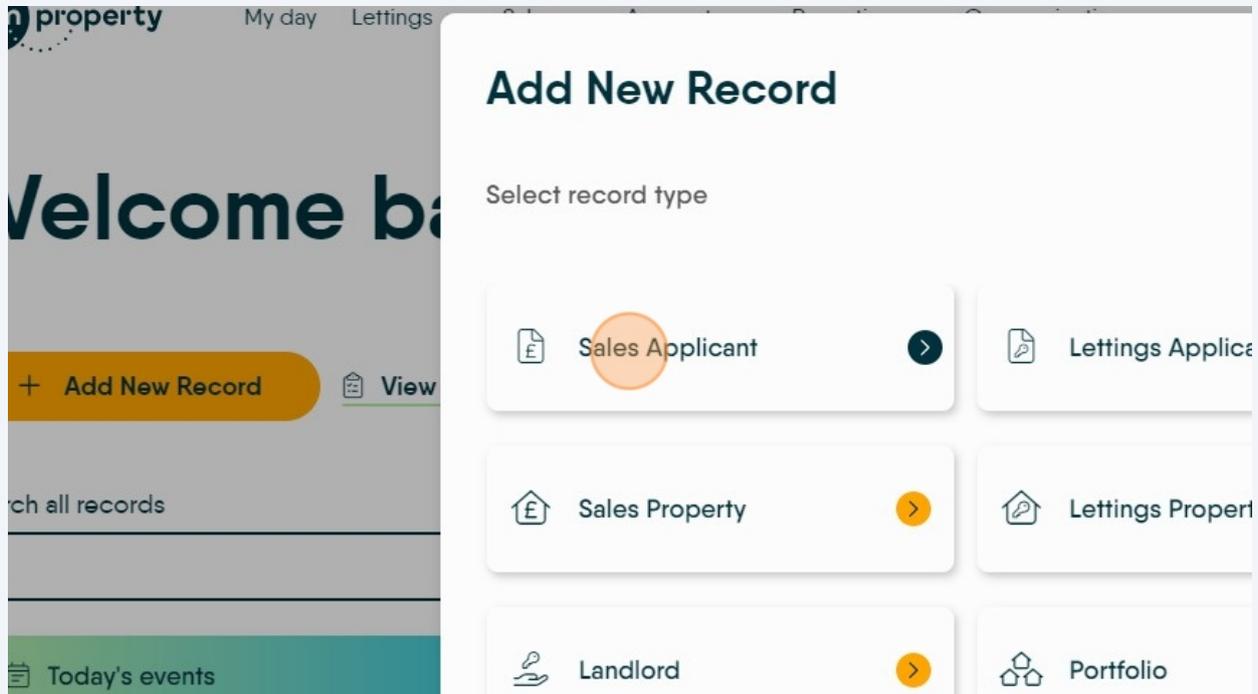


3 Click "Add new record"



4 Click "Sales Applicant"

Tip! if you press and hold the 'ctrl' key on your keyboard this screen will open in a new browser screen.



5 Click here and complete all the fields required.

**The minimum information required to set up a new applicant is the Surname and Email address.**

If an email address is used that has been used previously in CRM, you will see a screen that allows you to merge or import the data from the old record into the new one.

The screenshot displays the iAmProperty CRM interface. The top navigation bar includes the iAmProperty logo, menu items like 'My day', 'Lettings', 'Sales', 'Accounts', 'Reporting', and 'Communications', and user account information. A sidebar on the left shows 'Latest Offer' (£0.00), 'Offer Status', 'Applicant Status', 'Applicant Temp.', and 'Last Contacted' (01/01/0001 00:00). The main content area is titled 'Personal information' and contains several input fields: Title (highlighted with an orange circle), Forename, Surname, Company name, Website, Phone number, Work phone, Mobile phone, Email address, Salutation, Source Advert, and Temperature. Below this is the 'Applicant address' section with 'Postcode' and 'Address' fields. An 'Import' button is visible in the top right of the personal information section, and an 'Edit manually' button is in the address section.



Tip! the absolute minimum information required to add an applicant is Surname and Email address.

6

Click here to create the 'Salutation'. It is always a good idea to create this as it is often used in letters and email templates and if not created will leave a blank space in the letter or template.

Reference:  Negotiator: Training Dave  Branch: Morgan & Co  Status: Active

Personal information Import

Title Mr	Forename David	Surname Johnson	Company name
Website	Phone number 01870860871	Work phone 01870860871	Mobile phone 07711223344
Email address david.johnson@iampropert	Salutation 	Source Advert	Temperature

Applicant address Edit manually

Postcode Enter postcode	Address ...
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Contact notes

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Click the "Enter postcode" field. click the search icon to find the property address of the applicant.

Title  
Mr

Forename  
David

Website

Phone number  
01870860871

Email address  
david.johnson@iampropert

Salutation  
Mr Johnson

Applicant address

Postcode  
Enter postcode

Contact notes

8 Select the address from the drop down menu.

The screenshot shows a contact form with several input fields. The 'Forename' field contains 'David', 'Surname' contains 'Johnson', and 'Company name' is empty. The 'Phone number' field contains '01870860871'. The 'Salutation' field contains 'Mr Johnson' and has a wrench icon. A dropdown menu is open, showing a list of addresses starting with '71 Pelaw Crescent, Chester le Street, County Durham, DH22HX, UK'. The first address is highlighted. Below the list is an 'Address' field with a search icon and the text '-- Select Address --'. An 'Import' button is in the top right corner, and a save icon is in the bottom right corner.

Forename David	Surname Johnson	Company name
Phone number 01870860871	-- Select Address --	
Salutation Mr Johnson	71 Pelaw Crescent, Chester le Street, County Durham, DH22HX, UK	
	72 Pelaw Crescent, Chester le Street, County Durham, DH22HX, UK	
	73 Pelaw Crescent, Chester le Street, County Durham, DH22HX, UK	
	74 Pelaw Crescent, Chester le Street, County Durham, DH22HX, UK	
	75 Pelaw Crescent, Chester le Street, County Durham, DH22HX, UK	
	Address -- Select Address --	

9 If the address isn't showing or is incorrect select the best option and then click "Edit manually"

The screenshot shows the same contact form as in step 8, but with the 'Edit manually' button highlighted. The 'Address' field now contains the selected address: '71 Pelaw Crescent, Chester le Street, County Durham, DH22HX, UK'. The 'Work phone' field contains '01870860871' and the 'Mobile phone' field contains '07711223344'. The 'Source' dropdown menu is set to 'Advert' and the 'Temperature' dropdown menu is empty. The 'Edit manually' button is in the bottom right corner, and a save icon is in the bottom right corner.

Forename David	Surname Johnson	Company name
Phone number 01870860871	Work phone 01870860871	Mobile phone 07711223344
Salutation Mr Johnson	Source Advert	Temperature
	Address 71 Pelaw Crescent, Chester le Street, County Durham, DH22HX, UK	

10

If the address needs to be edited, then click into this field. Click this text field. Complete all the updates.

The screenshot shows a 'Details' sidebar on the left and an 'Applicant address' form on the right. The form contains the following fields:

- Postcode: DH22hx
- House: 71 (highlighted with an orange circle)
- Line1: Pelaw Crescent
- Town: Chester le Street
- County: County Durham

Below the address form is a 'Contact notes' section with a text input field.

11

Once the address is selected and any edits are complete scroll down the screen.

The screenshot shows the full user profile page. At the top, there is a navigation bar with 'iamproperty', 'CRM', 'movebutler', and 'iamsold'. Below this is a menu with 'My day', 'Lettings', 'Sales', 'Accounts', 'Reporting', and 'Communications'. A 'My account' button is visible in the top right.

The main content area contains a grid of contact information fields:

- Title: Mr
- Forename: David
- Surname: Johnson
- Company name
- Website
- Phone number: 01870860871
- Work phone: 01870860871
- Mobile phone: 07711223344
- Email address: david.johnson@iampropert
- Salutation: Mr Johnson
- Source: Advert
- Temperature

Below this is the 'Applicant address' section, which includes an 'Edit manually' button and a search icon. The address fields are:

- Postcode: DH22hx
- Address: 71 Pelaw Crescent, Chester le Street, County Durham, DH22HX, UK
- House: 719
- Line1: Pelaw Crescent
- Line2
- Town: Chester le Street
- County: County Durham
- Country: UK

At the bottom is the 'Contact notes' section.

An orange circle highlights the vertical scroll bar on the right side of the page.

12

Click "Enter your notes here..." these could be best times to contact the applicant, or not contact.

The screenshot shows the 'iam property' CRM interface. At the top, there is a navigation bar with 'My day', 'Lettings', 'Sales', 'Accounts', 'Reporting', and 'Communication'. On the left, a contact card displays 'Latest Offer' as £0.00, 'Offer Status', 'Applicant Status' with a red 'x' icon, 'Applicant Temp.', and 'Last Contacted' as 01/01/0001 00:00. Below this is a 'Details' button. On the right, the 'Contact notes' section features a text area with a placeholder 'Enter your notes here...' and a toolbar with icons for Bold (B), Italic (I), Underline (U), and a list/bulleted list icon. An orange circle highlights the text area.



Alert! This area is customisable to your needs. The options in Applicant Criteria on your CRM will be different from what are shown here. Some options may be empty or contain different options to those shown



Tip! If you are going to use the 'Matching' function in CRM then it is important you put some details into the Applicant Criteria area.

13

Now add the Applicant Criteria, this is the details of the type of property the applicant is looking for. Click the "Search for Area..." field.

The screenshot shows the 'iam property' dashboard. On the left, there is a sidebar with a 'Details' button. The main content area is titled 'Applicant criteria'. It features a search bar labeled 'Search for Area...' which is highlighted with an orange circle. Below the search bar are two input fields for 'Min Price' and 'Max Price', both set to '£ 0'. There is also a 'Move in date' field set to '18/10/2024' and a 'Property Attributes' section at the bottom.

14

Type the town, street, postcode of the area your applicant is looking for a property.

This screenshot is similar to the previous one, but the 'Search for Area...' field now contains the text 'Durham, UK'. The orange circle highlights this field. The rest of the dashboard, including the sidebar, price fields, and move-in date, remains the same.

15

Click into this drop down to set a search radius around the area selected. If a town is selected this is around the postcode area for that town.

The screenshot shows a search interface with a dropdown menu open. The dropdown menu lists search radius options: 1/4 Mile, 1/2 Mile, 1 Mile (highlighted with an orange circle), 3 Miles, 5 Miles, and 10 Miles. To the right of the dropdown is a dark blue button labeled 'Add Area'. Below the dropdown is a search bar labeled 'Search Property Type' with a list of property types: Apartment and Bar/Nightclub. To the left of the dropdown, there are several input fields, including one labeled 'Max Price' with a value of '£ 0'. To the right of the dropdown, there is a section labeled 'Minimum Bathrooms' with a value of '0'. At the bottom left, there are two toggle switches, one labeled 'portunity' and another labeled 'portunity'.

16

Click here to set the lower price limit the applicant is looking for

The screenshot shows an 'Applicant criteria' form. The form has a header with navigation links: 'my day', 'Settings', 'Sales', 'Accounts', 'Reporting', and 'Communications'. The form is divided into two main sections. The left section contains a table with the following data: 'Latest Offer' with a value of '£0.00', 'Offer Status', 'Applicant Status' with a red 'x' icon, 'Applicant Temp.', and 'Last Contacted' with a value of '01/01/0001 00:00'. Below this table is a button labeled 'Details' with a person icon. The right section contains a form with the following fields: 'Durham, UK', 'Move in date' with a value of '18/10/2024', and 'Property Attributes' with a toggle switch labeled 'Rental Investment Opportunity'.

17 Click here to add the upper limit.

Applicant criteria

Durham, UK 1 Mile

Min Price £ 110,000 Max Price £|0 Minimum Bedrooms 0

Move in date 18/10/2024 Buyer position

Property Attributes Rental Investment Opportunity Property Type Search Property Type Apartment

18 Click this text field to add the minimum number of bedrooms and minimum number of bathrooms.

Reporting Communications My account

1 Mile Add Area

Max Price £ 150,000 Minimum Bedrooms |0 Minimum Bathrooms 0

Buyer position

Property Type Search Property Type Apartment

19 Click here to set the buyer position

	Max Price	£ 150,000	Minimum Bedrooms	3	Minimum Bathrooms	2
			Buyer position			
			Cash Buyer			
			First Time Buyer			
			Nothing to Sell			
			Investor			
			Property to Sell - Not on Market Yet			
			Barn Conversion			
portunity		<input type="checkbox"/>				
portunity		<input type="checkbox"/>				
portunity		<input type="checkbox"/>				
portunity		<input type="checkbox"/>				



Tip! The more completely these screens are filled in the more accurate any property match will be.

20

Click the "Search Property Type" field to set the types of property the applicant is looking for. Complete the other screens as required.

The screenshot shows the 'iamproperty' CRM interface. The top navigation bar includes 'My day', 'Lettings', 'Sales', 'Accounts', 'Reporting', and 'Communications'. A 'My account' button is visible in the top right. The main content area is divided into several sections:

- Property Attributes:** Includes toggle switches for 'Rental Investment Opportunity', 'Lend/Development Opportunity', 'Refurb Investment Opportunity', and 'HMO Investment Opportunity'.
- Property Type:** Features a search field labeled 'Search Property Type' (highlighted with an orange circle) and a list of property types with toggle switches: 'Apartment', 'Bar/Nightclub', 'Barn', and 'Barn Conversion'.
- Property Age:** Includes a search field 'Search Property Age' and toggle switches for 'Period', 'Pre-war', 'Post-war', and 'Modern'.
- Property Style:** Includes a search field 'Search Property Style' and toggle switches for '30's Semi', 'Addison Homes', 'Georgian', and 'Victorian'.
- Other Criteria:** Includes toggle switches for 'Garden' and 'Parking'.

A 'Details' button is located in the left sidebar.

21

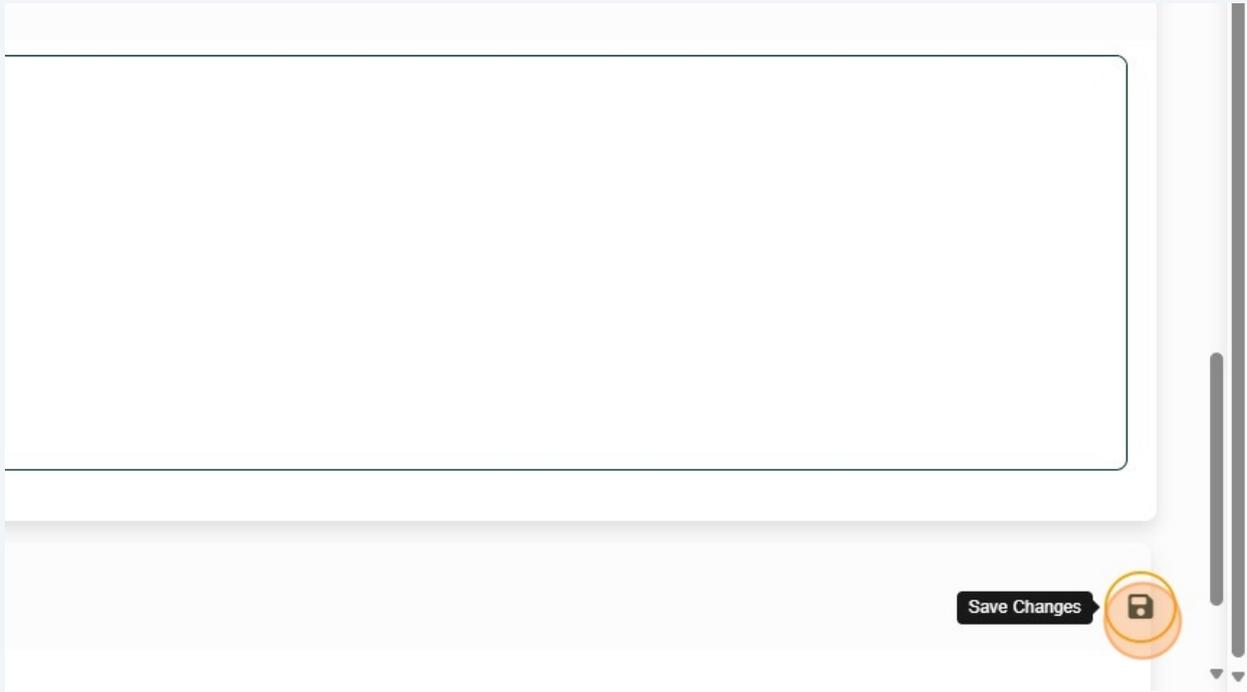
Click "Additional information" to add any more info regarding the applicants requirements.

The screenshot shows the 'Additional information' section of the CRM interface. The left sidebar contains a 'Details' button. The main content area is titled 'Additional information' (highlighted with an orange circle) and contains a rich text editor with the following elements:

- Buttons for Bold (B), Italic (I), Underline (U), and a link icon.
- A text input field with the placeholder text 'Enter your notes here...'.

Below the text input, there are two sections with toggle switches: 'Single Garage' and 'Double Garage'.

22 Click here to save the details you have added.



23

Once the new applicant is saved there will be a list of new menu options on the left of the screen.

**Checklist** will only be of use if you have created a Checklist for a New Sales Applicant.

**Viewings** will show entries created in the Property record as well as the calendar, **Offers** will show entries created in the Property Record as well as the Applicant record.

**Documents**, any documents relating to the Applicant should be loaded into here.

Reference:  Negotiator: Training Dave Branch: Morgan & Co

**Personal Information**

Title: Miss Forename: Salesette Surname: Applicant123

Website: Phone Number: 0123552555 Work phone:

Email Address: zagg.dave@gmail.com Salutation: Source:

**Applicant Address**

Postcode: DL2 2HX Address: 77 Yew Tree Close, Hurworth on 1

## Creating a Linked Applicant



As mentioned at the start of this guide it is important to create Linked Applicants where there are more than 1 applicant in a sales or lettings agreement. This allows quick and easy linking to other areas of CRM e.g. movebutler or Referencing.

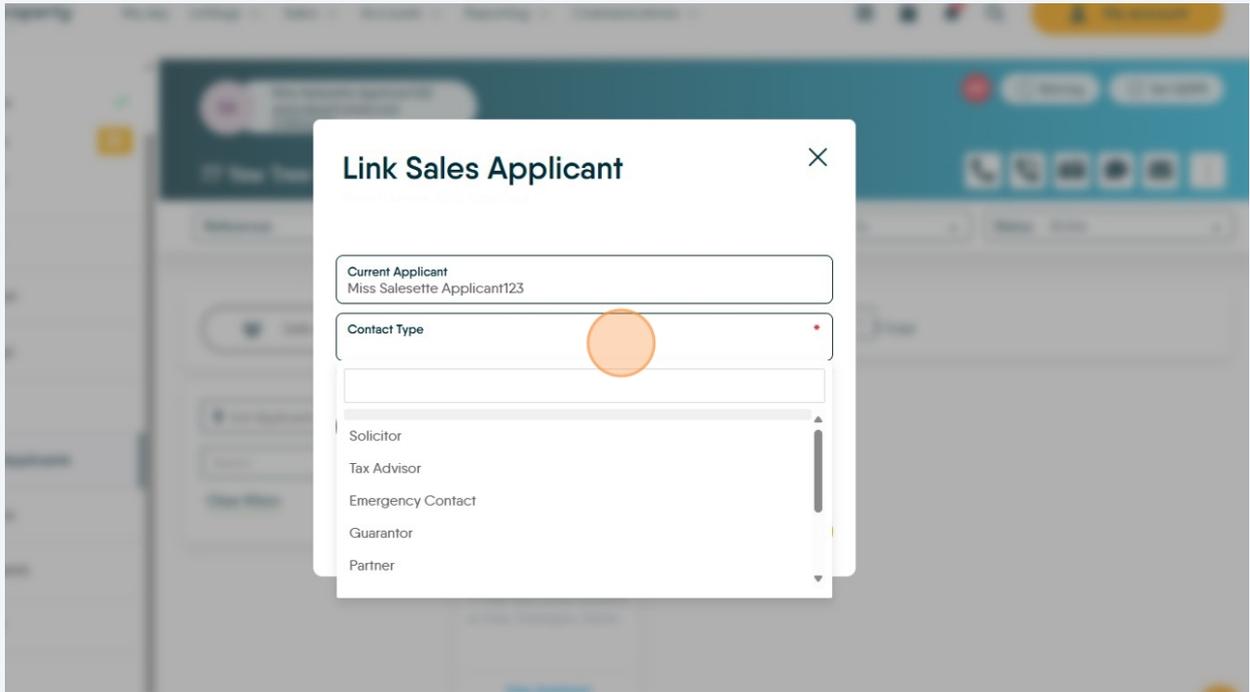
## 24 Click "Linked Applicants"

The screenshot shows a CRM interface for a property listing. On the left is a sidebar menu with options: Details, Checklist, Viewings, Offers, **Linked Applicants** (highlighted with an orange circle), Contacts, Documents, Journal, E-Sign, and Audit. The main content area displays the details for 'Miss Salesette Applicant123' (SA) with contact information: zagq.dave@gmail.com and 078522332. The address is '77 Yew Tree Close, Hurworth on Tees, Darlington, Durham'. Below this is a form for 'Personal Information' with fields for Title (Miss), Forename (Salesette), Surname (Applicant123), Company Name, Website, Phone Number (0123552555), Work phone, Mobile phone (078522332), Email Address (zagq.dave@gmail.com), Salutation, Source, and Temperature (Hot). Below that is the 'Applicant Address' section with Postcode (DL2 2HX) and Address (77 Yew Tree Close, Hurworth on Tees, Darlington, Durham, DL2 2HX). At the top right, there are status indicators: AP, Warning, and a 'Status Active' dropdown.

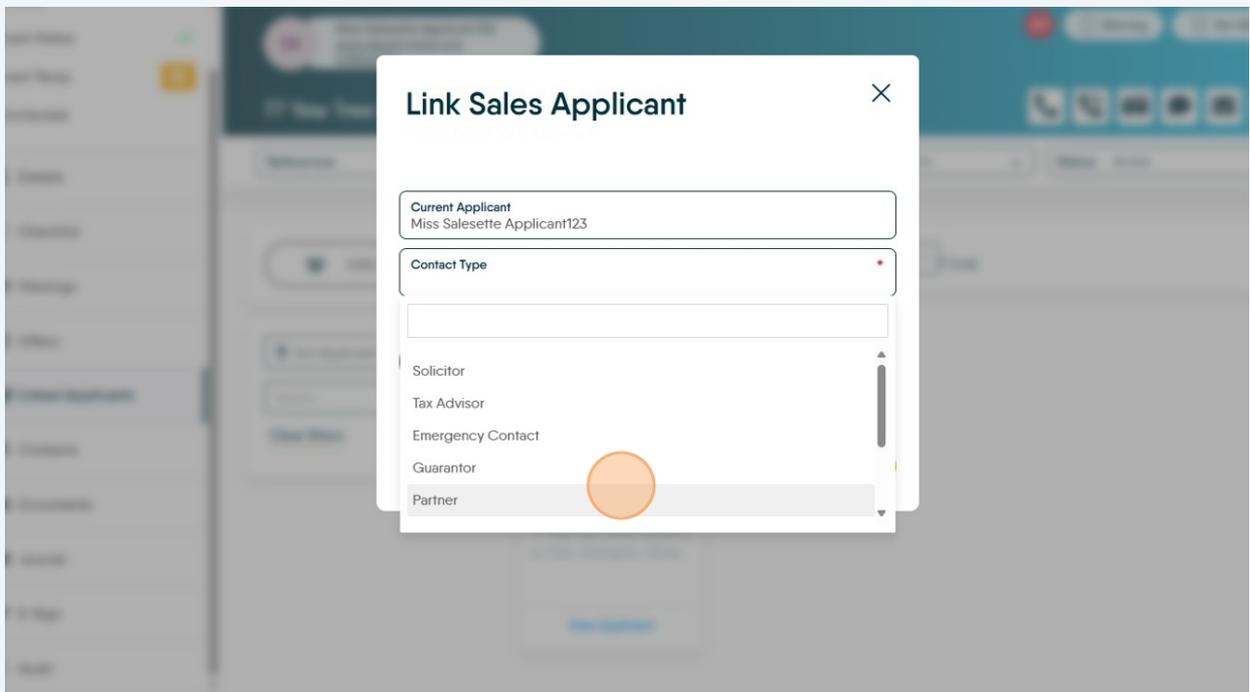
## 25 Click "Link Applicant"

The screenshot shows the 'Link Applicant' section in the CRM. The top navigation bar includes 'iam property' and various menu items: My day, Lettings, Sales, Accounts, Reporting, and Communications. The main content area features a 'Link Applicant' button (highlighted with an orange circle) and a 'Sort Applicants' dropdown. Below the button is a search bar and a 'Clear filters' link. On the right, there is a card for a 'Partner' with a profile picture (SA), name 'Mr sales applicant123', email 'zagq.dave@gmail.com', and address '77 Yew Tree Close, Hurworth on Tees, Darlington, Durha...'. At the top right, there are status indicators: AP, Warning, and a 'Status Active' dropdown.

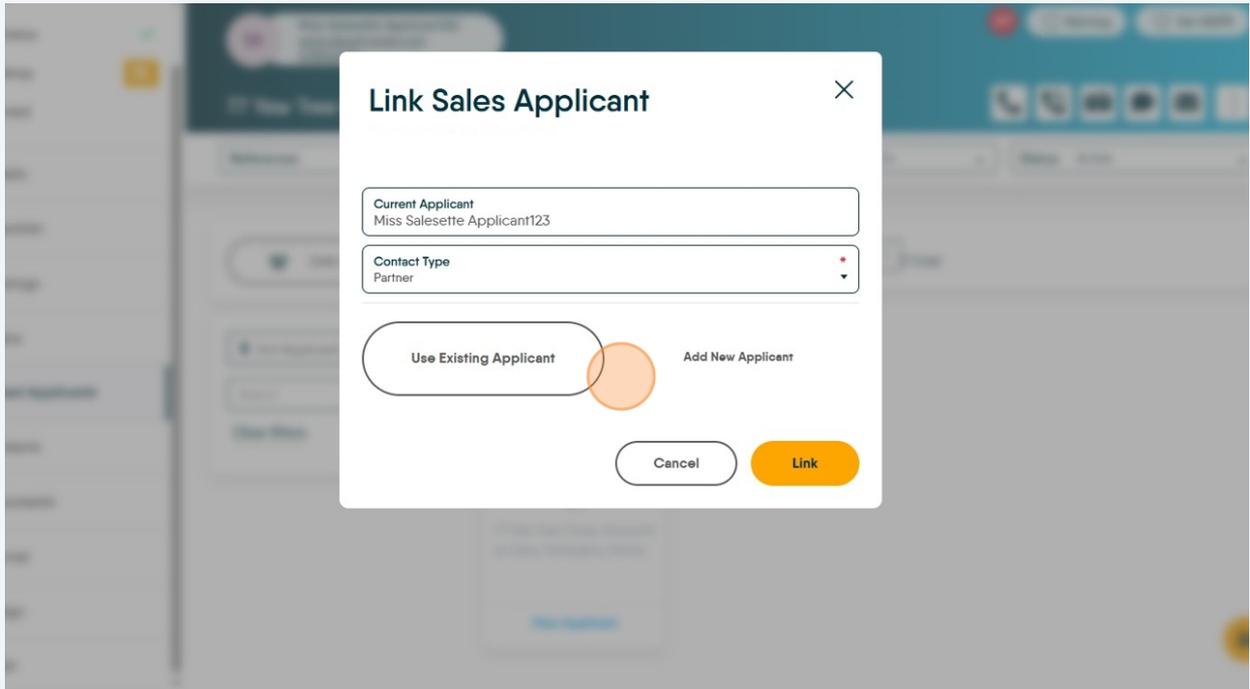
26 Click here.



27 Click "Partner"



28 Click here.



29 Click "Link"

