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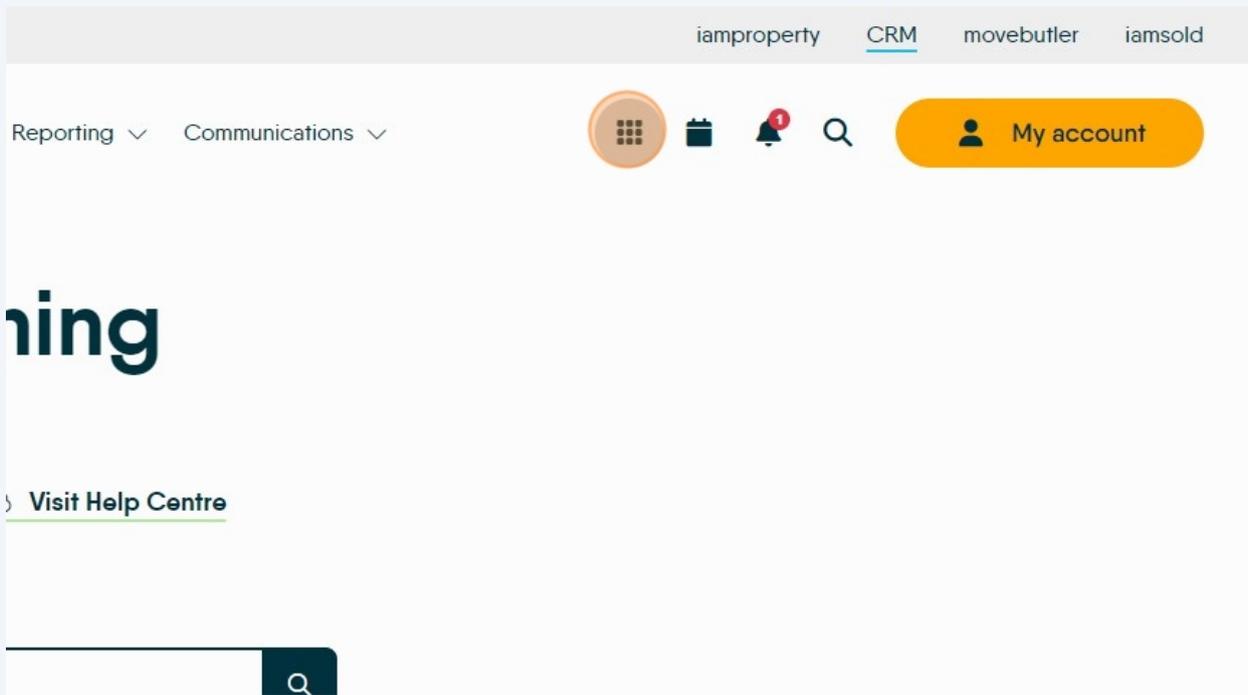
By following this detailed instruction, users can ensure accuracy and completeness in their data entry, which is crucial for effective sales tracking and customer relationship management.

The guide is particularly beneficial for new users or those unfamiliar with the CRM interface, helping them navigate the system with confidence.
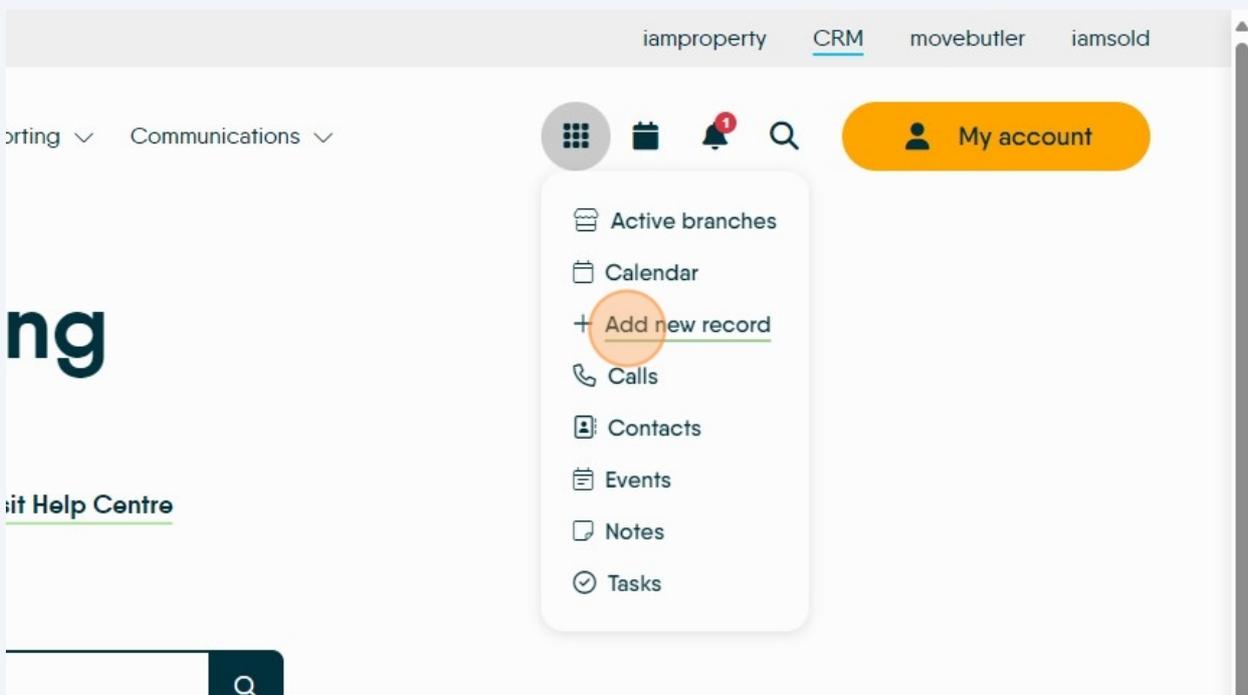
1   Navigate to **https://crm.iamproperty.com/MyDay**

(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

iamproperty   CRM   movebutler   iamsold

Reporting ⌄   Communications ⌄   ⚏   📅   🔔¹   🔍   👤 My account

ning

⟩ Visit Help Centre

🔍

3 Click "Add new record"

iamproperty   CRM   movebutler   iamsold

orting ⌄   Communications ⌄   ⚏   📅   🔔¹   🔍   👤 My account

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it Help Centre

🗄 Active branches
📅 Calendar
+ Add new record
📞 Calls
📇 Contacts
📅 Events
🗒 Notes
⊘ Tasks

🔍

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.
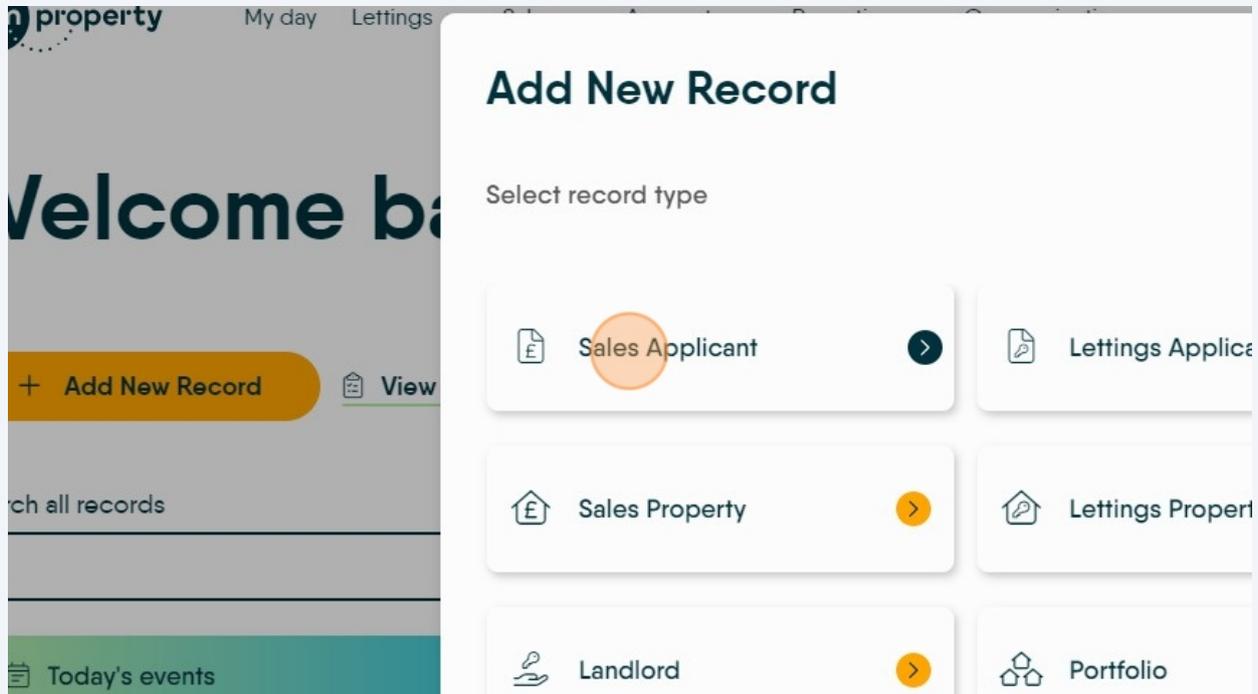
5 Click here and complete all the fields required.

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.

ℹ️ 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 | Forename | Surname | Company name |
| Mr ▾ | David | Johnson | |

| Website | Phone number | Work phone | Mobile phone |
| | 01870860871 | 01870860871 | 07711223344 💬 |

Build Salutation

| Email address | Salutation ✂ | Source | Temperature |
| david.johnson@iampropert ✉ | | Advert ▾ | ▾ |

Applicant address   📍 Edit manually

| Postcode | Address |
| Enter postcode 🔍 | , , , |

Contact notes

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

| Title | Forename |
| Mr ▾ | David |

| Website | Phone number |
| | 01870860871 |

| Email address | Salutation ✂ |
| david.johnson@iampropert ✉ | Mr Johnson |

Applicant address

| Postcode |
| Enter postcode 🔍 |

Contact notes

8 Select the address from the drop down menu.

| Forename | Surname | Company name |
| David | Johnson | |

| Phone number |
| 01870860871 |

-- Select Address --

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

| Salutation | |
| Mr Johnson | |

Address
-- Select Address --

Import

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

| ...ame | Surname | Company name |
| ...d | Johnson | |

| ...e number | Work phone | Mobile phone |
| ...0860871 | 01870860871 | 07711223344 |

| ...ation | Source | Temperature |
| ...ohnson | Advert | |

📍 Edit manually

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.

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

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

⚠️ 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.

iam property   My day   Lettings ⌄   Sales ⌄   Accounts ⌄   Reporting ⌄   Communication

Applicant criteria

Latest Offer	£0.00
Offer Status	
Applicant Status	✕
Applicant Temp.	
Last Contacted	01/01/0001 00:00

Search for Area...

Min Price   £ 0   Max Price   £ 0

Move in date
18/10/2024

👤 Details

Property Attributes

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

iam property   My day   Lettings ⌄   Sales ⌄   Accounts ⌄   Reporting ⌄   Communications

Applicant criteria

Latest Offer	£0.00
Offer Status	
Applicant Status	✕
Applicant Temp.	
Last Contacted	01/01/0001 00:00

Durham, UK

Min Price   £ 0   Max Price   £ 0

Move in date
18/10/2024

👤 Details

Property Attributes

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.

1/4 Mile

Add Area

1/4 Mile

1/2 Mile

1 Mile

3 Miles

5 Miles

10 Miles

Max Price   £ 0

Minimum Bathrooms   0

Search Property Type

Apartment

Bar/Nightclub

ortunity

portunity

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

property   My day   Lettings ∨   Sales ∨   Accounts ∨   Reporting ∨   Communications

Applicant criteria

Latest Offer   £0.00

Offer Status

Applicant Status   ✕

Applicant Temp.

Last Contacted   01/01/0001 00:00

Durham, UK

Min Price   £ 0

Max Price   £ 0

Move in date
18/10/2024

Details

Property Attributes

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   Buyer position
18/10/2024

Property Attributes   Property Type

Rental Investment Opportunity   Search Property Type

                                          Apartment

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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   Minimum Bathrooms
                        0   0

                        Buyer position

                        Property Type

                        Search Property Type

                        Apartment

19 Click here to set the buyer position

		Minimum Bedrooms	Minimum Bathrooms
Max Price	£ 150,000	3	2

Buyer position

ortunity

Cash Buyer

portunity

First Time Buyer

ortunity

Nothing to Sell

rtunity

Investor

Property to Sell – Not on Market Yet

Barn Conversion

ⓘ 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.

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

22 Click here to save the details you have added.

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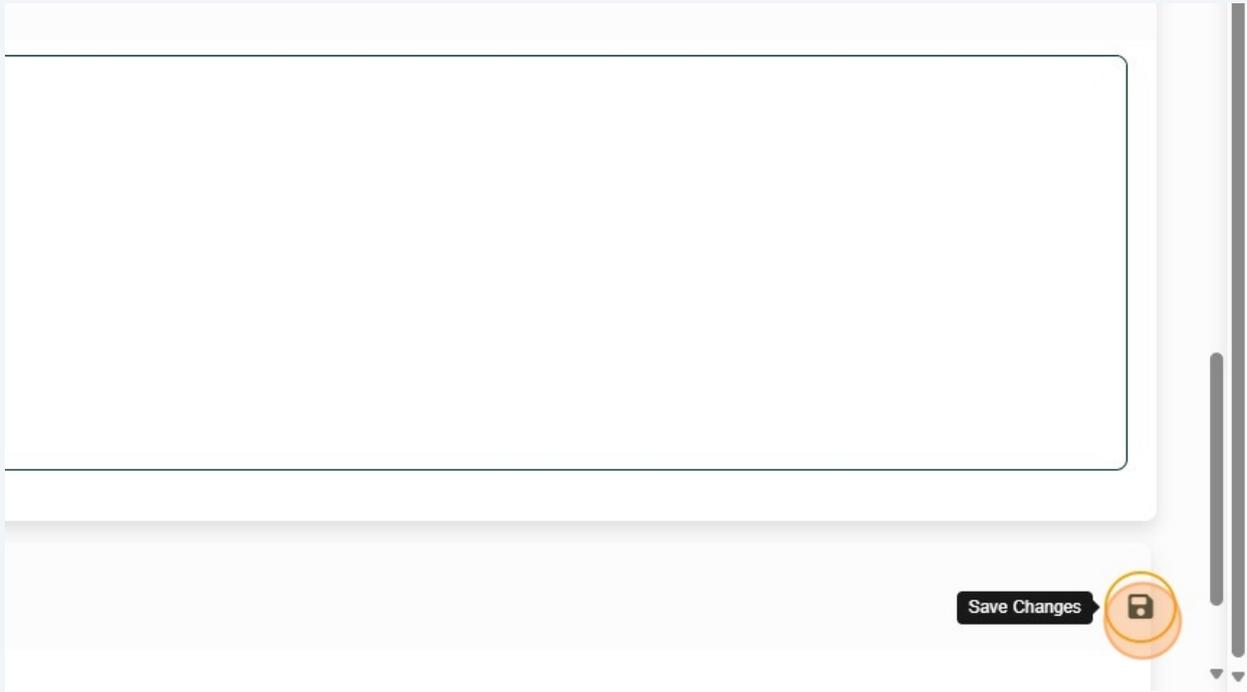
23 Once the new applicant is saved there will be a list of new menu options on the left of the screen.

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.

Creating a Linked Applicant

(i) 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"

25 Click "Link Applicant"

26 Click here.

27 Click "Partner"
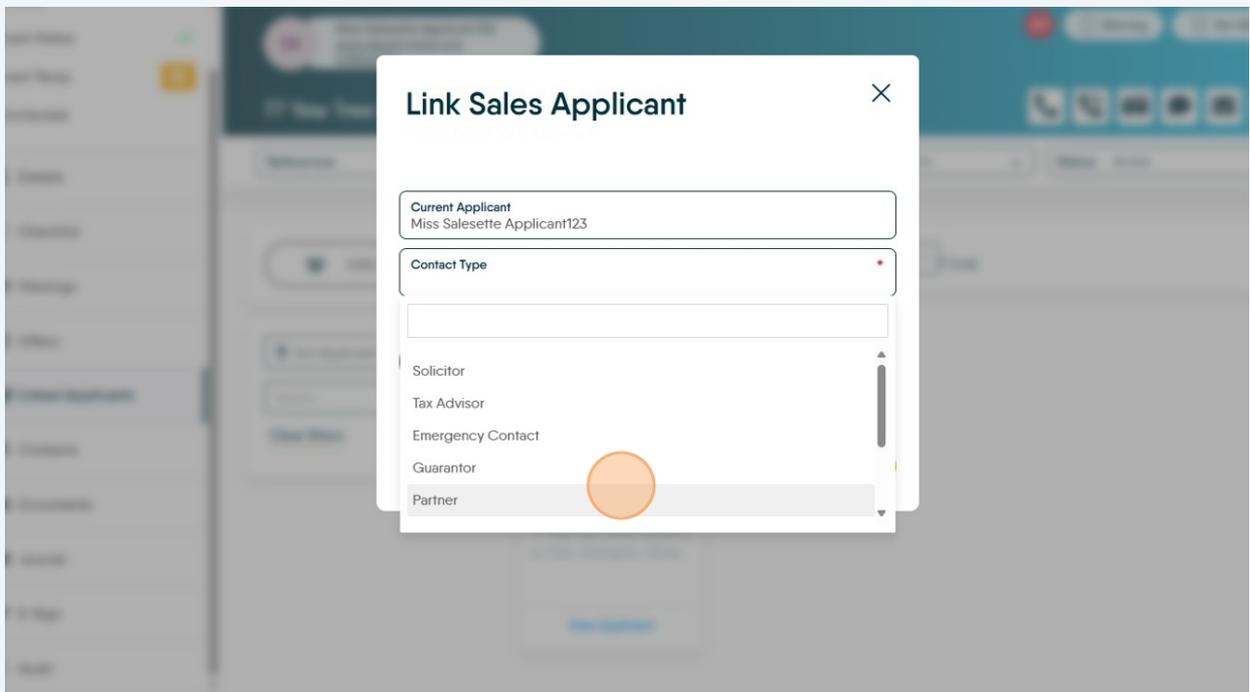
28 Click here.

29 Click "Link"