

Adding a Guarantor



This guide will show how to add a Guarantor record to a CRM Lettings Applicant record and how to view the details of all your Guarantors easily and quickly.

1 Navigate to the Applicant record

The screenshot displays the 'iam property' CRM interface. The top navigation bar includes 'My day', 'Lettings', 'Sales', 'Accounts', 'Reporting', and 'Communications'. A sidebar on the left contains a list of menu items: 'Details', 'Checklist', 'Viewings', 'Offers', 'Linked Applicants', 'Contacts', and 'Documents'. The main content area is titled 'Personal Information' and contains several input fields: Title (Mr), Forename (David), Surname (Morgan), Company Name, Website, Phone Number (01865860873), Work phone, Mobile phone (07802200655), Email Address (crm.training@iamproperty.c), Salutation, Source, and Temperature. Below this is the 'Applicant Address' section with a search icon and an 'Edit Manually' button. The 'Contact Notes' section features a rich text editor with bold, italic, and underline icons and a text area with the placeholder 'Type Contact Notes here...'. The top right corner shows a 'My account' button.

2 Click "Contacts"

Latest Offer **£0.00**

Offer Status

Status **A**

Applicant Temp.

Created 17:32 21/04/2025

Last Contacted

- Details
- Checklist
- Viewings
- Offers
- Linked Applicants
- Contacts**
- Documents
- Journal

Personal Information

Title Mr	Forename David	Surname Morgan	Company Name
Website	Phone Number 01865860873	Work phone	Mobile phone 07802200655
Email Address crm.training@iamproperty.c	Salutation	Source	Temperature

Applicant Address

Postcode OX29 6SW

Address Alternative Communication Systems Acer Court, North Leigh Busi

[Edit Ma](#)

Contact Notes

B I U

Type Contact Notes here...

3 Click "New Contact"

iamproperty CRM movebutle

My day Lettings Sales Accounts Reporting Communications

iamproperty

My a

Latest Offer **£0.00**

Offer Status

Status **A**

Applicant Temp.

Created 17:32 21/04/2025

Last Contacted

- Details
- Checklist
- Viewings
- Offers
- Linked Applicants
- Contacts**

+ New Contact

Sort Contacts

Search

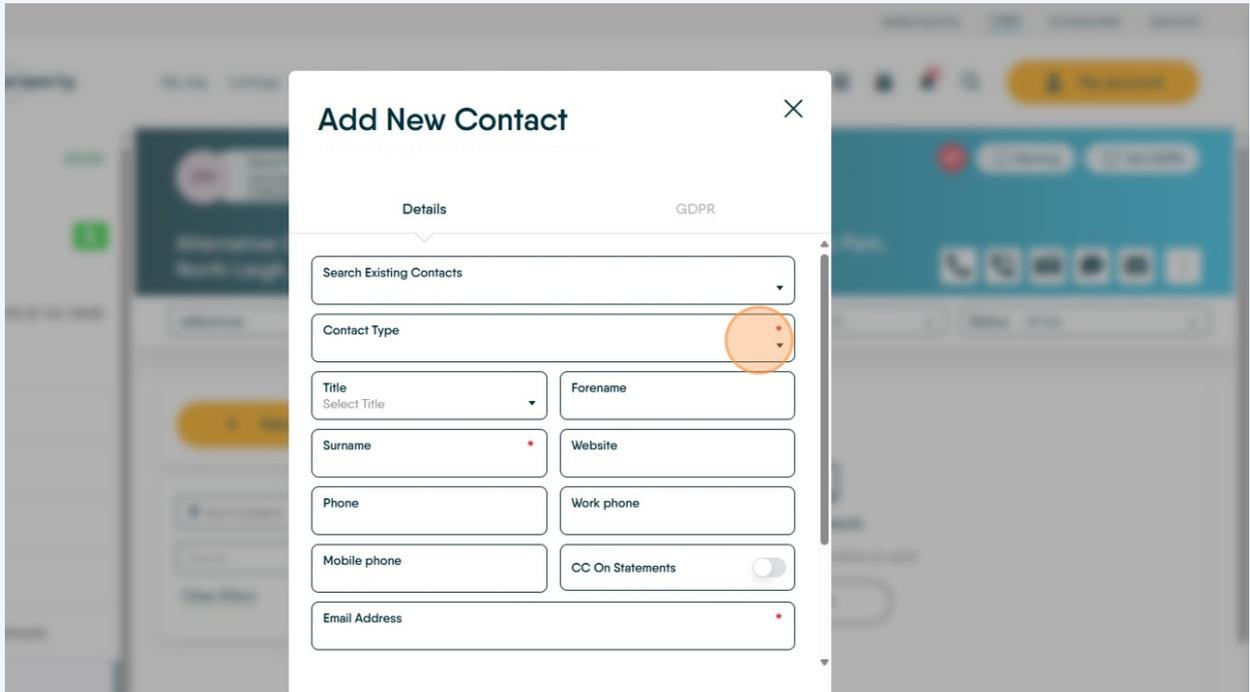
[Clear filters](#)

No contacts

Please click the button to add.

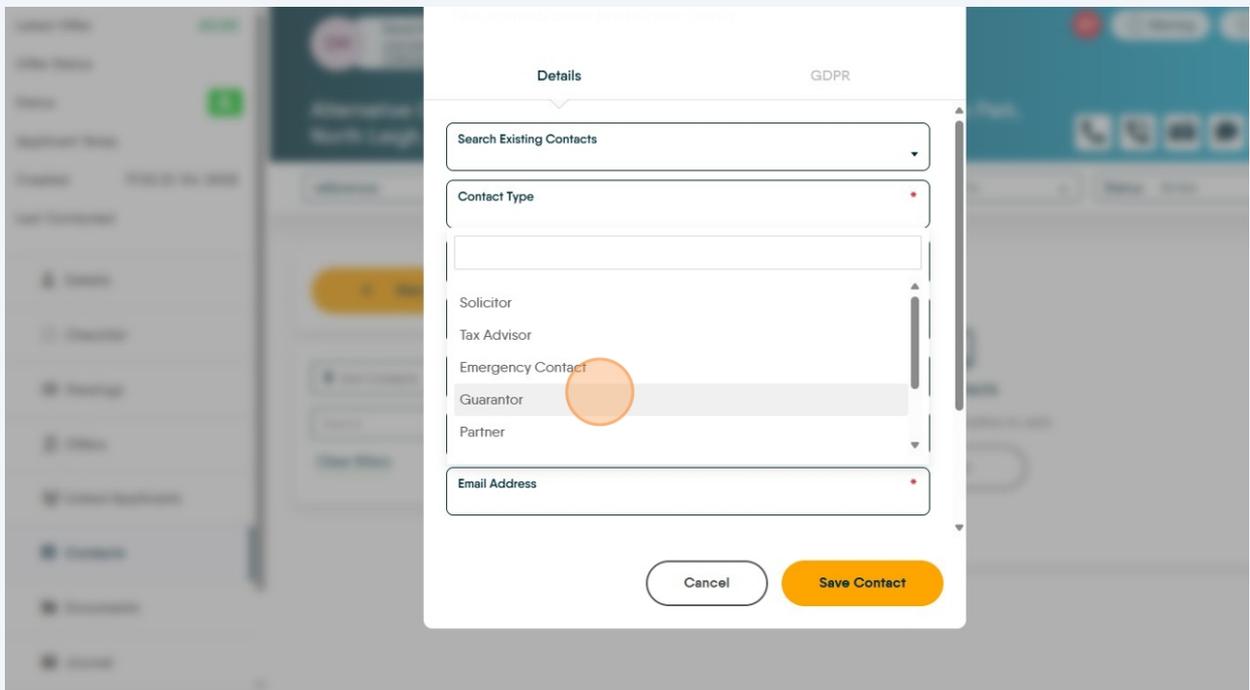
Start

4 Click here.



The screenshot shows a modal window titled "Add New Contact" with a close button (X) in the top right corner. Below the title are two tabs: "Details" (selected) and "GDPR". The form contains several input fields: "Search Existing Contacts" (a dropdown menu), "Contact Type" (a dropdown menu with a red asterisk and an orange circle highlighting the dropdown arrow), "Title" (a dropdown menu with "Select Title" as the current selection), "Forename" (a text input field), "Surname" (a text input field with a red asterisk), "Website" (a text input field), "Phone" (a text input field), "Work phone" (a text input field), "Mobile phone" (a text input field), "CC On Statements" (a toggle switch), and "Email Address" (a text input field with a red asterisk).

5 Click "Guarantor"



The screenshot shows the same "Add New Contact" modal window. The "Contact Type" dropdown menu is open, showing a list of options: "Solicitor", "Tax Advisor", "Emergency Contact", "Guarantor" (highlighted with an orange circle), and "Partner". Below the dropdown is an "Email Address" input field with a red asterisk. At the bottom of the modal are two buttons: "Cancel" and "Save Contact".

6

Click and complete all the fields in the new contact screen.

The screenshot shows the 'Add New Contact' form with the following fields and options:

- Search Existing Contacts (dropdown)
- Contact Type: Guarantor (dropdown)
- Title: Select Title (dropdown, highlighted with an orange circle)
- Forename (text input)
- Surname (text input)
- Website (text input)
- Phone (text input)
- Work phone (text input)
- Mobile phone (text input)
- CC On Statements (toggle switch)
- Email Address (text input)

Buttons: Cancel, Save Contact

The screenshot shows the 'Add New Contact' form with the Title dropdown menu open, displaying the following options:

- Mr
- Miss
- Mrs
- Ms

The Forename field is highlighted with an orange circle.

Buttons: Cancel, Save Contact

ADD NEW CONTACT

Details GDPR

Search Existing Contacts

Contact Type
Guarantor

Title
Select Title

Forename

Surname *

Website

Phone

Work phone

Mobile phone

CC On Statements

Email Address *

Cancel Save Contact

ADD NEW CONTACT

Details GDPR

Search Existing Contacts

Contact Type
Guarantor

Title
Select Title

Forename

Surname *

Website

Phone

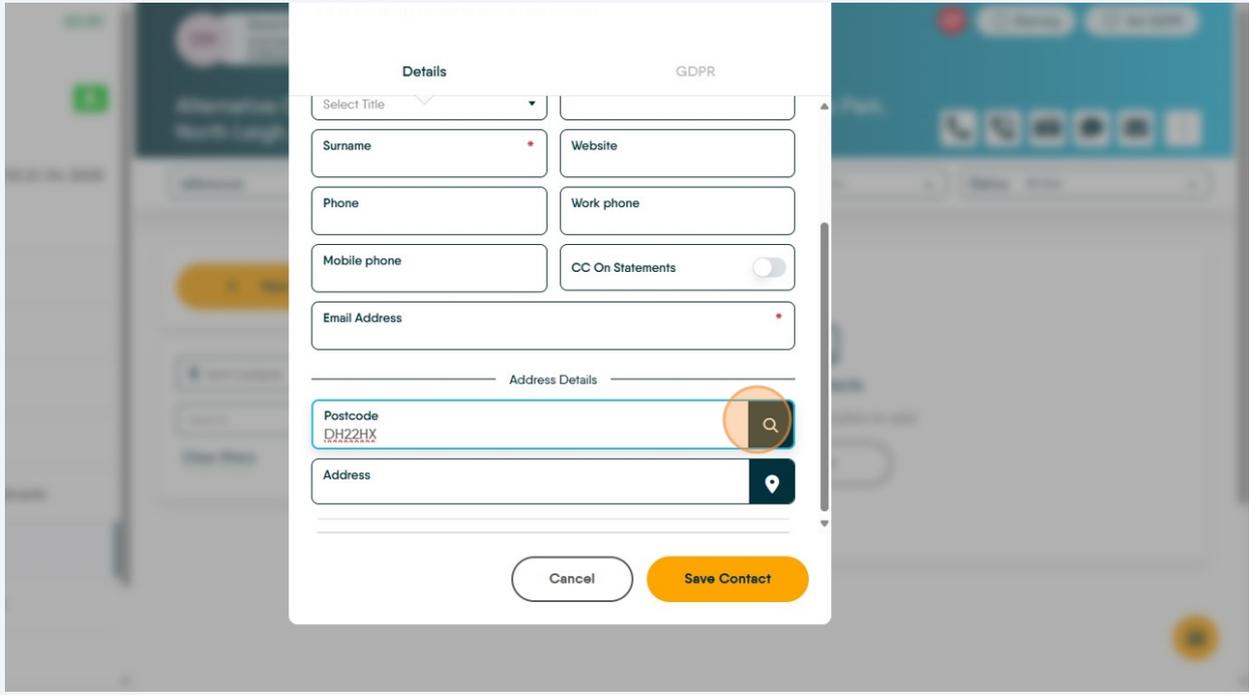
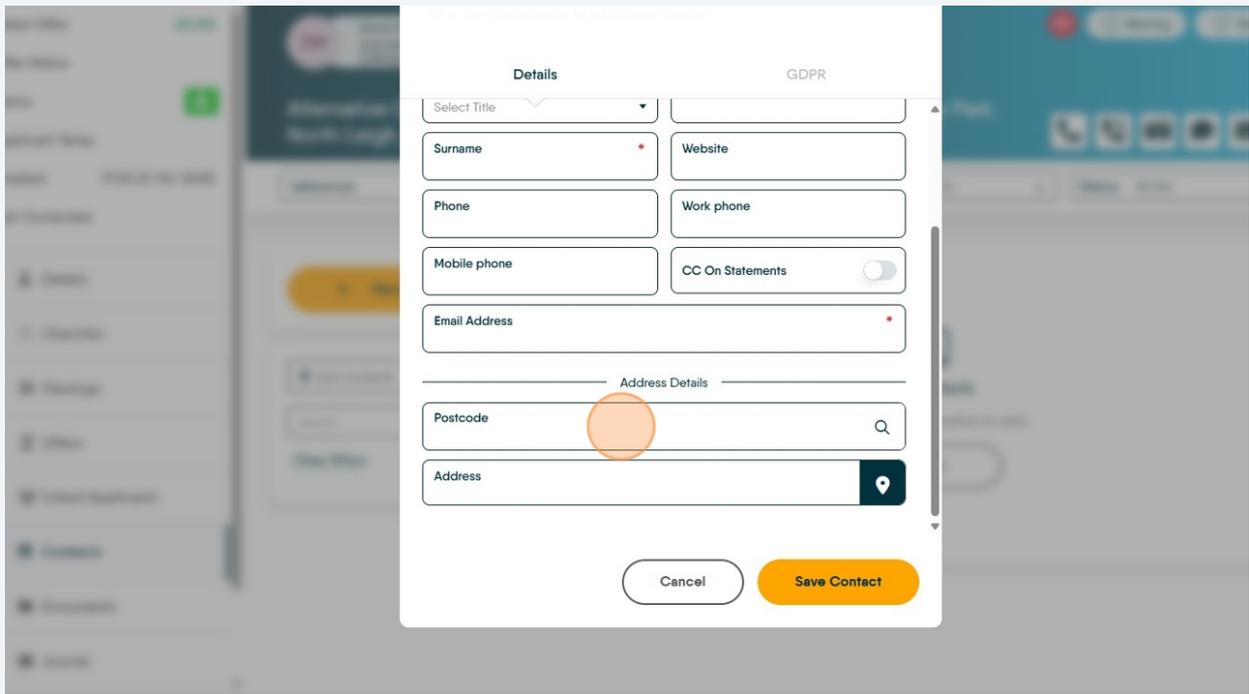
Work phone

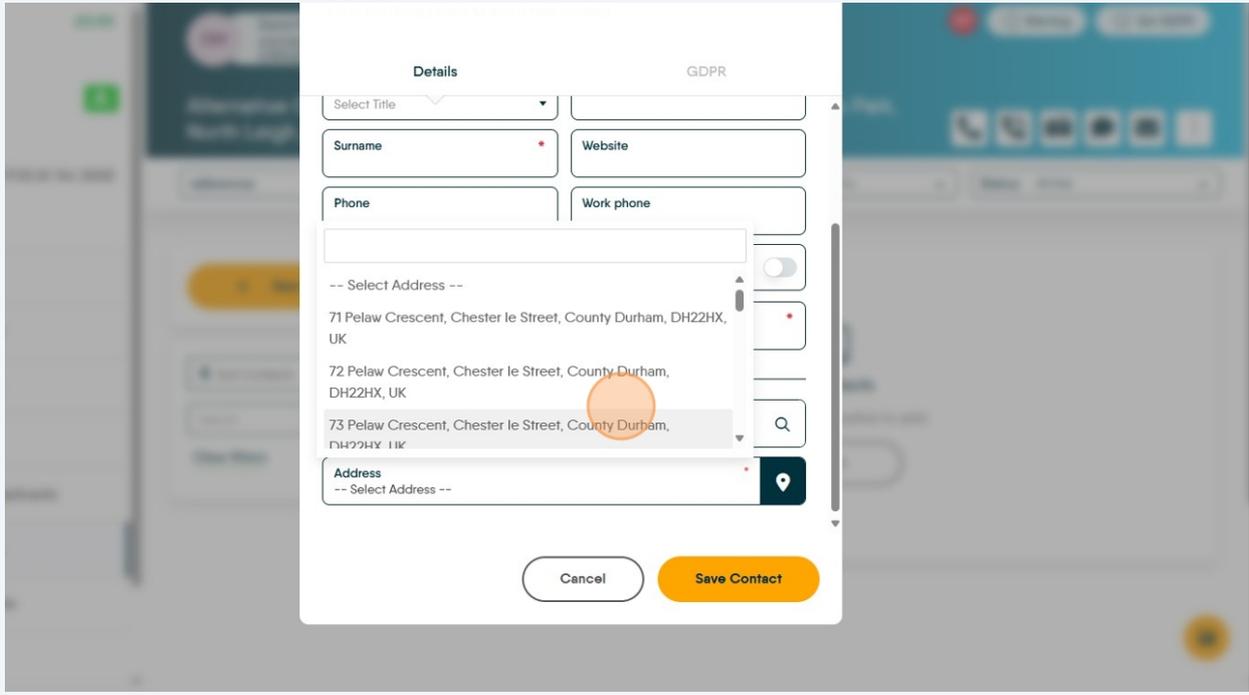
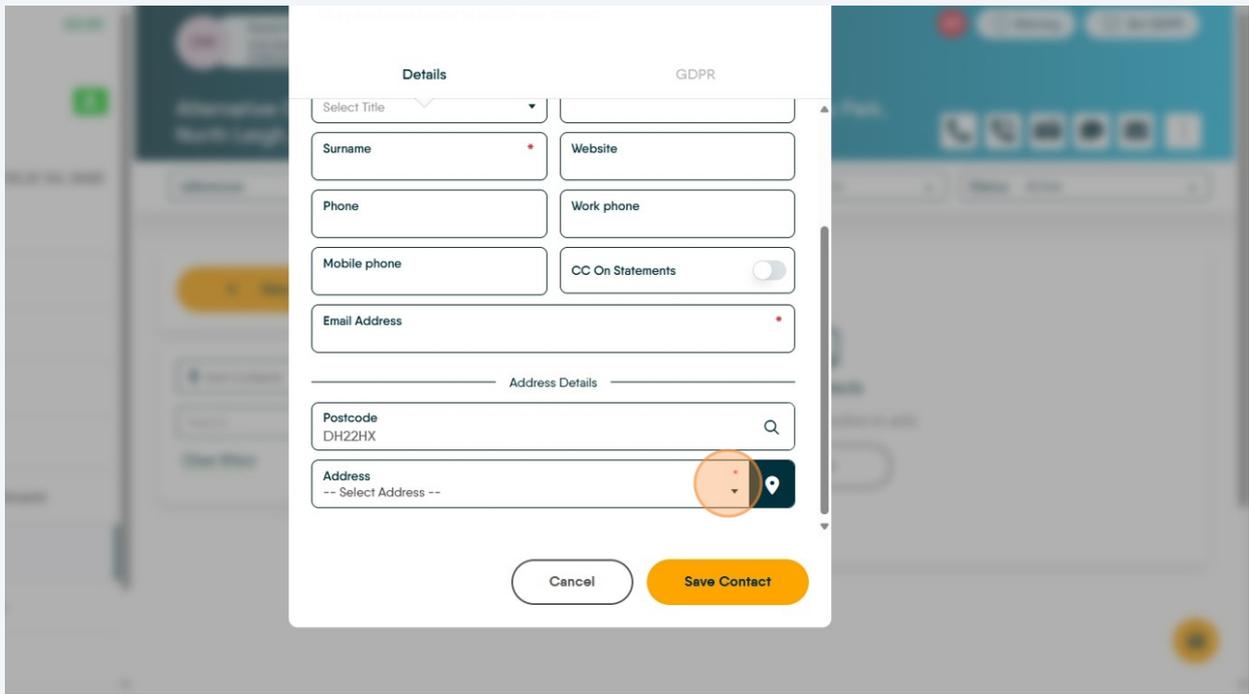
Mobile phone

CC On Statements

Email Address *

Cancel Save Contact





7 Click "Save Contact"

The screenshot shows a contact details form with two tabs: "Details" and "GDPR". The "Details" tab is active. The form contains the following fields:

- Select Title (dropdown)
- Surname (text input, marked with a red asterisk)
- Website (text input)
- Phone (text input)
- Work phone (text input)
- Mobile phone (text input)
- CC On Statements (toggle switch)
- Email Address (text input, marked with a red asterisk)
- Address Details section containing:
 - Postcode (text input, value: DH22HX)
 - Address (text input, value: 73 Pelaw Crescent, Chester le Street, County Durham, DH22HX, UK)

At the bottom of the form, there are two buttons: "Cancel" and "Save Contact". The "Save Contact" button is highlighted with an orange circle.

Viewing Guarantors Details

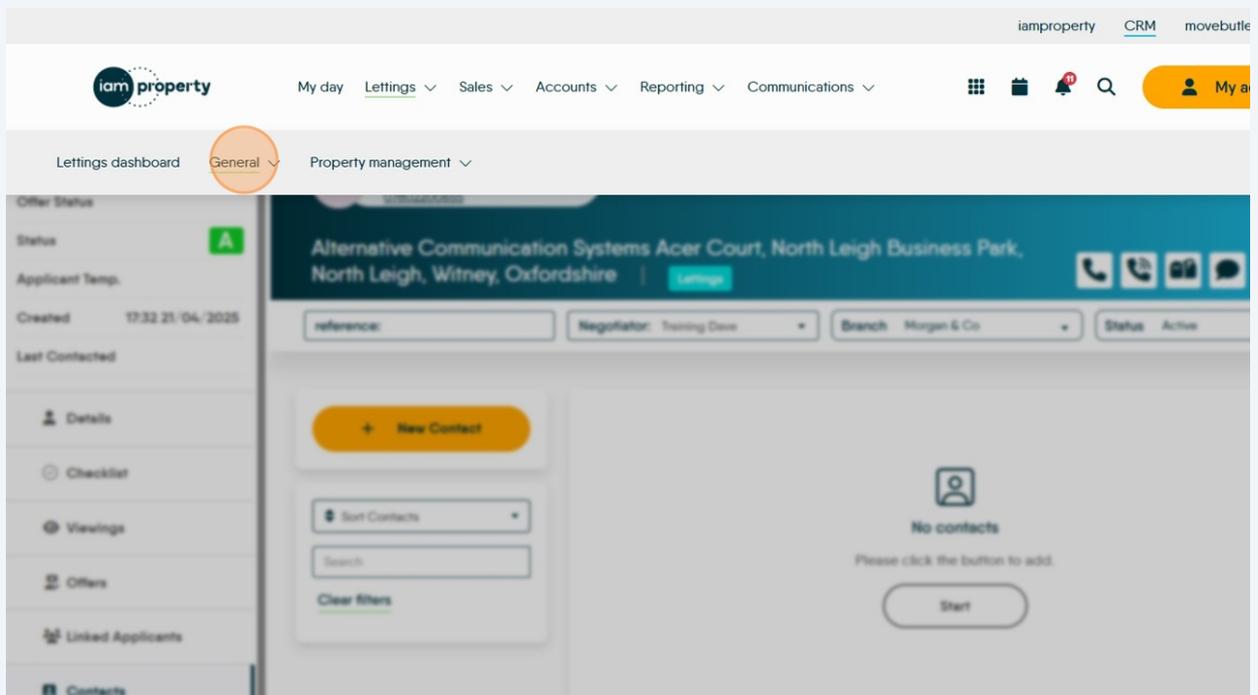
8 Click "Lettings"

The screenshot shows the iAmProperty CRM interface. The top navigation bar includes the iAmProperty logo, a user profile, and a search icon. The main navigation menu is open, and the "Lettings" option is highlighted with an orange circle. The "Lettings" section is active, displaying a contact card for David Morgan (DM) with the following details:

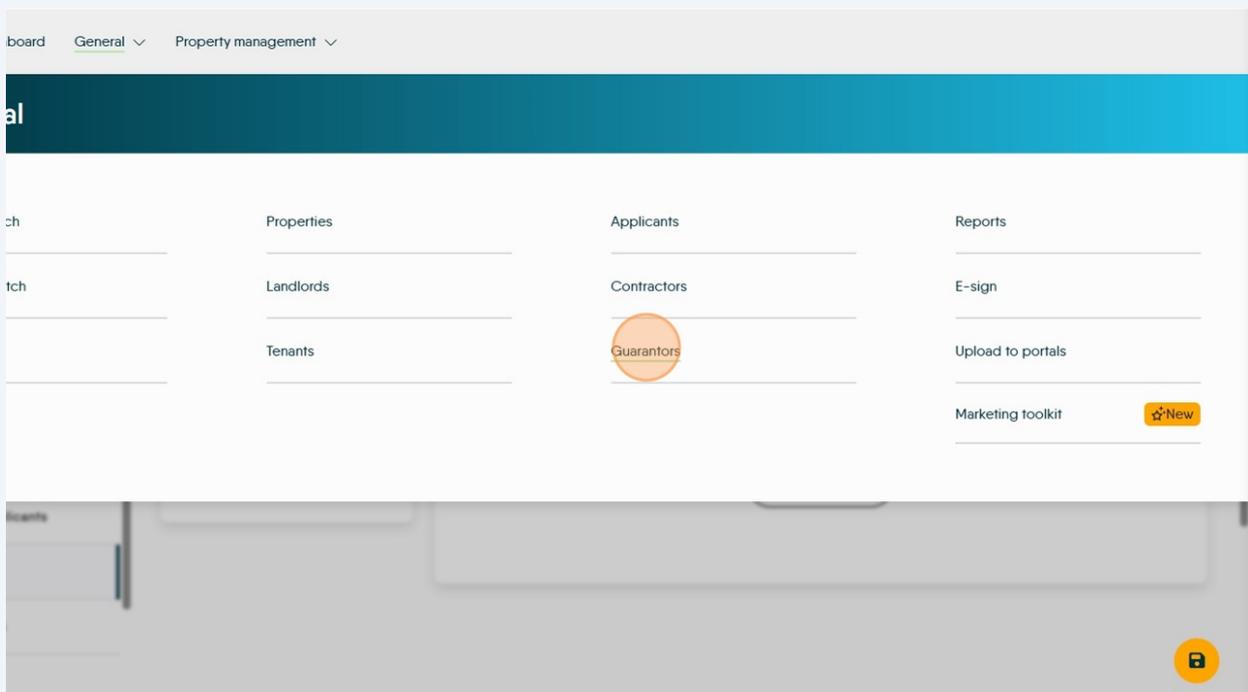
- Name: David Morgan
- Email: d.m.training@iamproperty.com
- Phone: 07802200655
- Address: Alternative Communication Systems Acer Court, North Leigh Business Park, North Leigh, Witney, Oxfordshire
- Property Type: Lettings

Below the contact card, there are filters for "reference:", "Negotiator: Training Dave", "Branch: Morgan & Co", and "Status: Active". A "New Contact" button is visible. The main content area shows "No contacts" and a "Start" button.

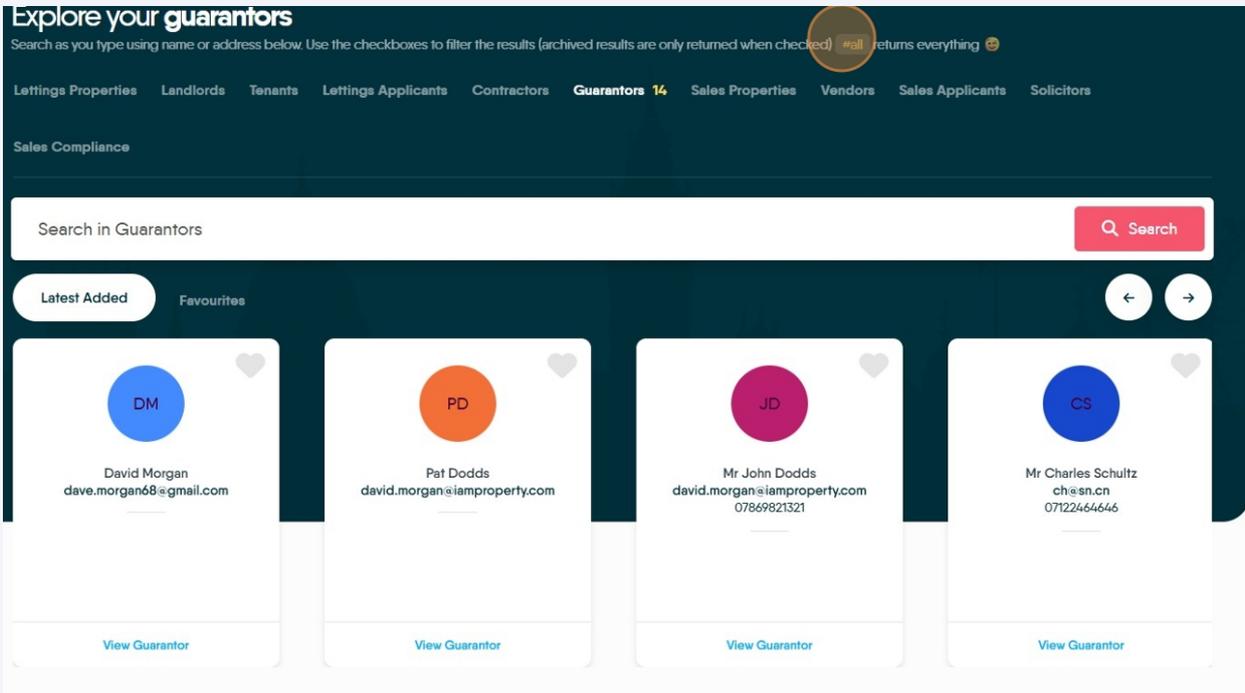
9 Click "General"



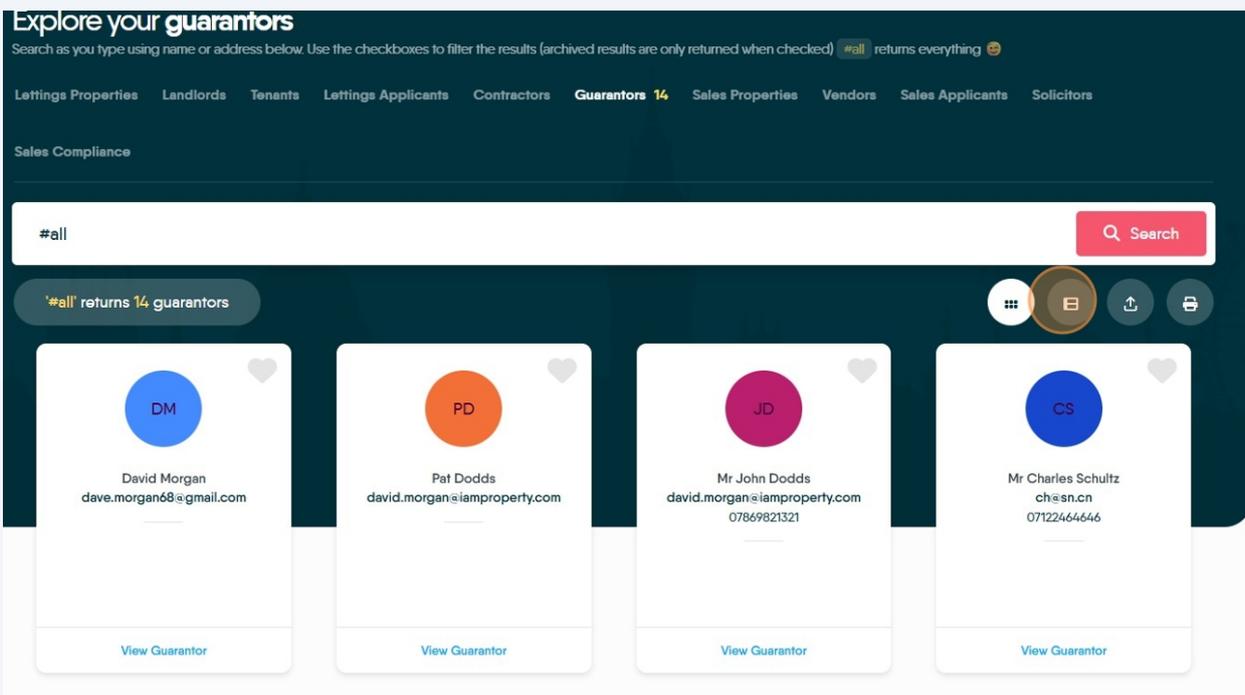
10 Click "Guarantors"



11 Click "#all" this will show all the Guarantor records.



12 The records can be viewed in 2 different views, a tile view as shown or by clicking the icon highlighted...



13 a list view.

Clicking the guarantor name will take you to the record. Click on the email to email the guarantor

Explore your guarantors

Search as you type using name or address below. Use the checkboxes to filter the results (archived results are only returned when checked) **#all** returns everything

Lettings Properties Landlords Tenants Lettings Applicants Contractors **Guarantors 14** Sales Properties Vendors Sales Applicants Solicitors

Sales Compliance

#all

#all returns 14 guarantors

Guarantor Name	Guarantor Address ↓	Phone	Mobile	Email	Date
Mr david morgan	1Yew Tree CloseHurworthDL22HXDarlingtonDurham	078542122		zagg.dave@gmail.com	22/0
Mr david morgan	1Yew Tree CloseHurworthDL22HXDarlingtonDurham	078542122		zagg.dave@gmail.com	22/0
Mr David Morgan	15Yew Tree CloseHurworthDL2 2HXDarlingtonDurham	07885464639	0785464639	davi.morgan@iamproperty.com	15/0
David Morgan				dave.morgan68@gmail.com	13/0
Pat Dodds				david.morgan@iamproperty.com	08/0
Mr John Dodds		012135454	07869821321	david.morgan@iamproperty.com	08/0
Mr Charles Schultz		019165633265	07122464646	ch@sn.cn	07/0