

How To... Link Journal Entries in CRM



This guide provides a straightforward method for linking journal entries in a 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.

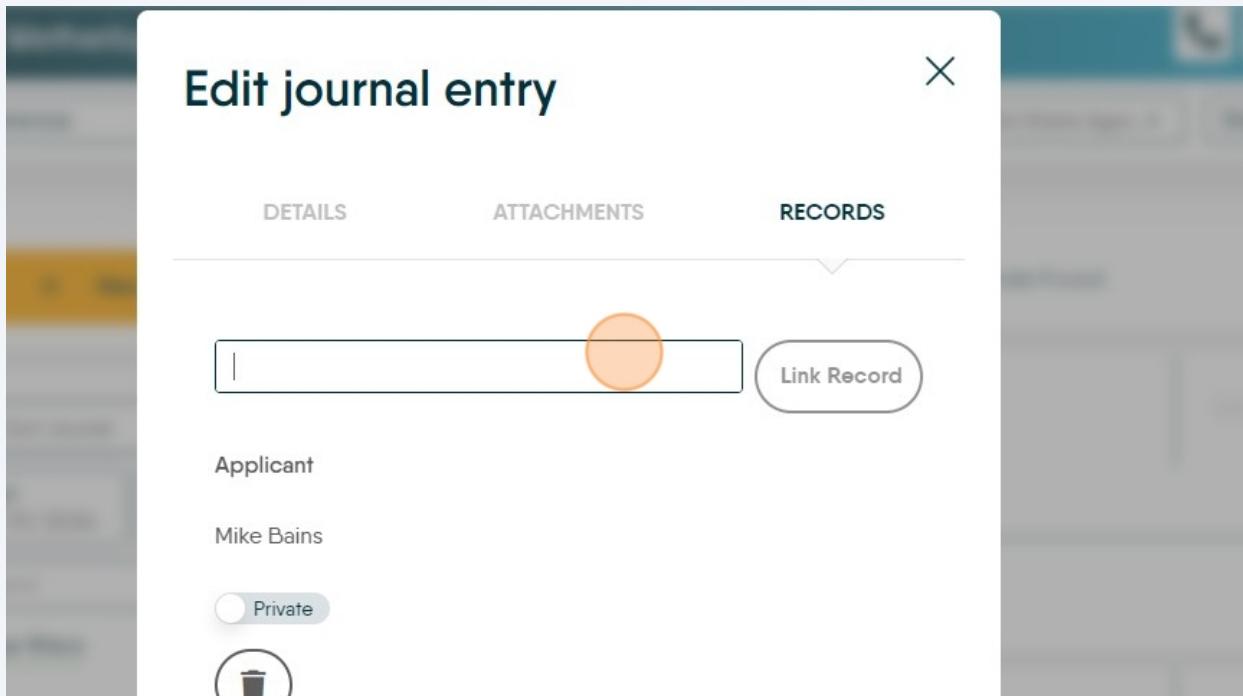
- 1 Navigate to <https://crm.iamproperty.com/myday> then navigate to the journal of one of the records you are linking.

- 2 Navigate to the Journal menu, on the journal you wish to link. Click here.

A screenshot of the iam property CRM interface. At the top, there are three dropdown filters: 'Initiator: Emma Franklin', 'Branch: Emma Franklin Estate Agen...', and 'Status: Active'. Below these, a search bar shows '2 Journals Found'. The main area displays two journal entries. The first entry on the left is from 'Emma Franklin' on '3/01/2025 10:26:00' and is a 'Call'. The second entry on the right is from 'Applicant - Mr Mike Bains'. Below the entries, there is a text message: 'v aware i have tried for fb'. At the bottom right of the journal list, there is a circular icon with a link symbol and the text 'Applicant - Mr Mike Bains'.

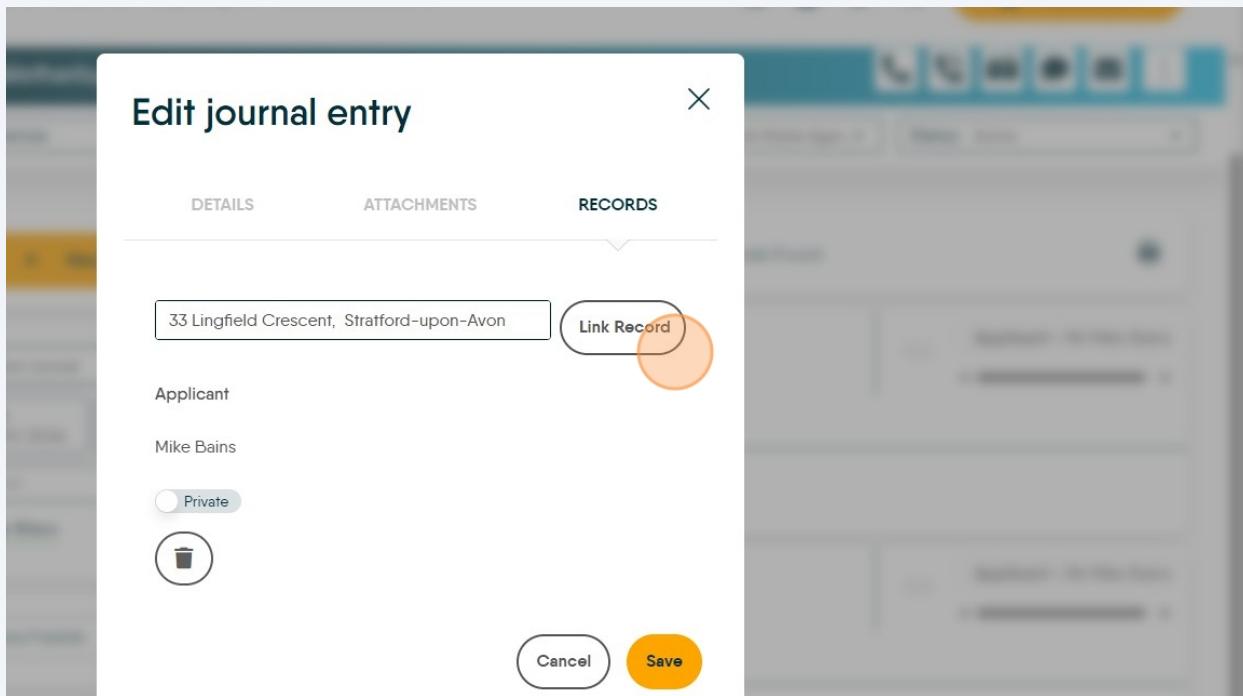
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In this text field enter the name of the person or property you are linking. Then from the list shown pick the record you are linking to.



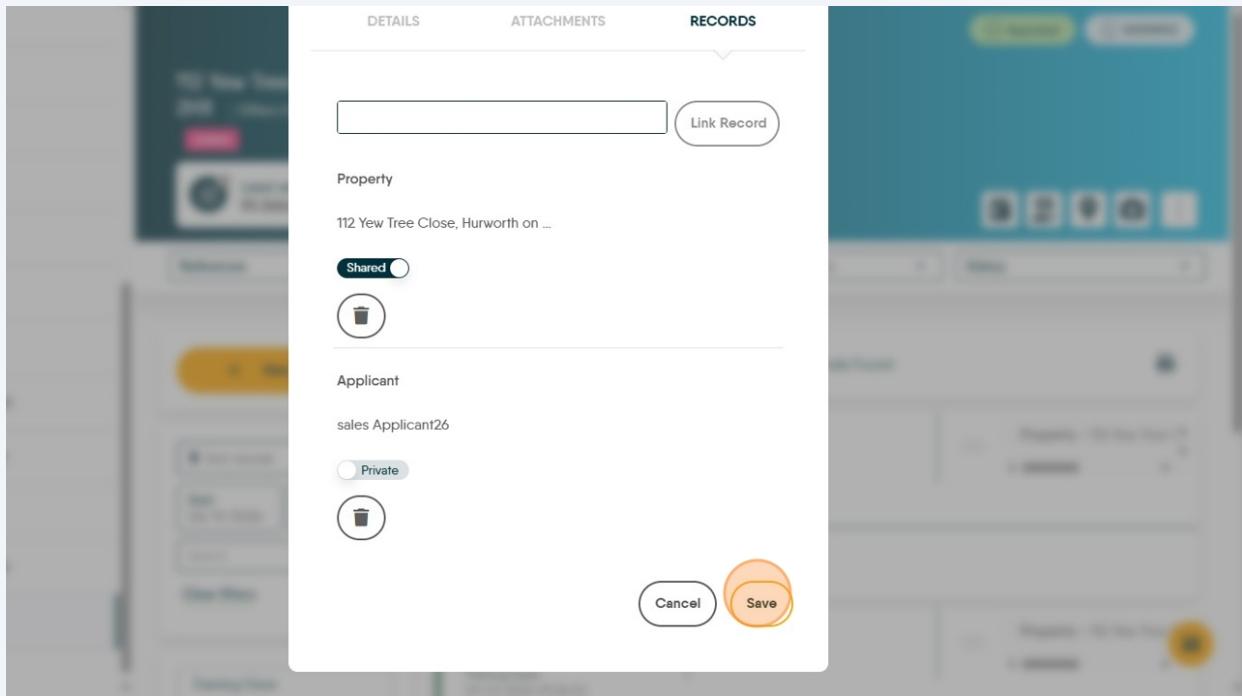
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Click here.



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



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