

Uploading Proof of Identity and Address Documents for a Vendor Record.

This guide provides a straightforward process for uploading essential identity and address verification documents for vendor records, ensuring compliance with necessary requirements.

By following the outlined steps, users can efficiently manage their documentation in a centralised platform, streamlining vendor management.

Viewing this guide will help maintain accurate records and avoid potential delays in vendor onboarding or transactions.

1

Navigate to a Sales Vendor record. This can be done via a search for records in the global search, using the Vendor tile in the sales activity list or the Vendor option in the Sales Menu [Search](#)



This process allows you to update the 'Identity Confirmed' and 'Address Confirmed' fields in the top left of the screen with a green tick and update the box highlighted below.

2

Once you have found the Vendor you are adding the documents for. Click "Documents",

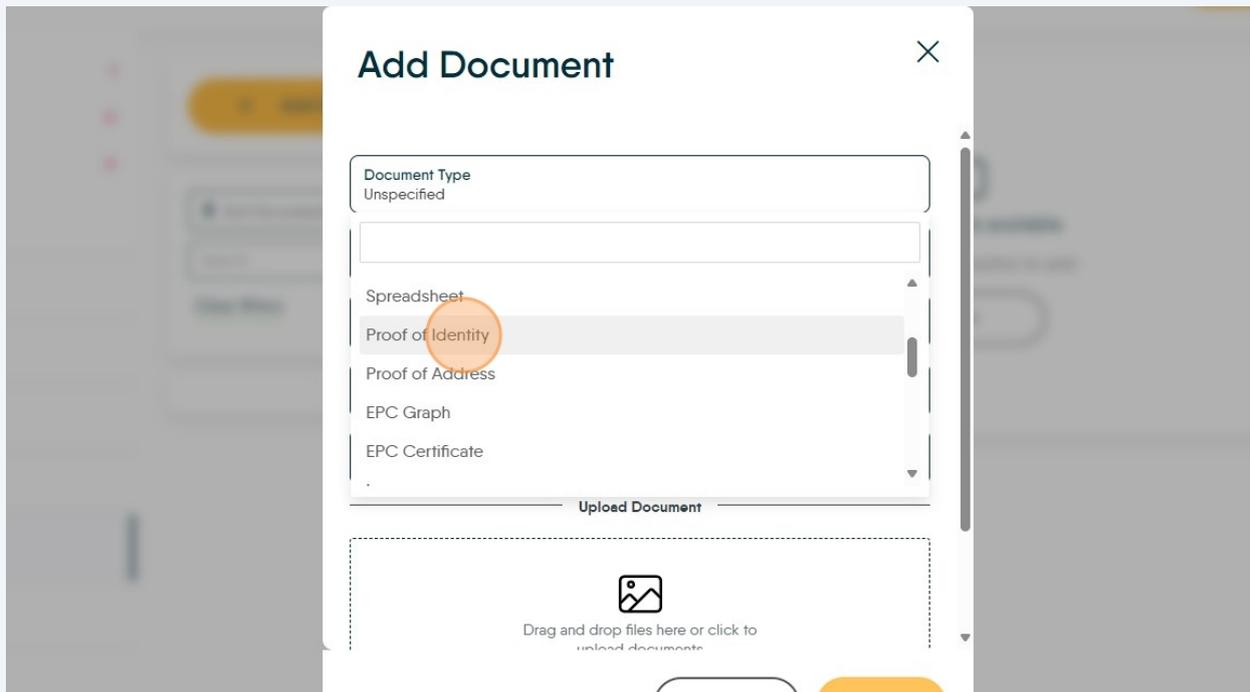
The screenshot shows a vendor details page. On the left is a sidebar with navigation options: Details, Checklist, Properties, Contacts, Documents (highlighted with an orange circle), Journal, E-Sign, and Audit. The main content area is titled 'Personal Information' and contains several input fields: Title (Mrs), Forename (Sales), Surname (Vendor30), Company Name, Salutation (Mrs Vendor30), Website, Phone Number, Work phone, Mobile phone, Email Address (zagg.dave2@gmail.com), and Source (Advert). On the right, a 'Vendor' section is partially visible with fields for Address, House, Line2, and Count.

3

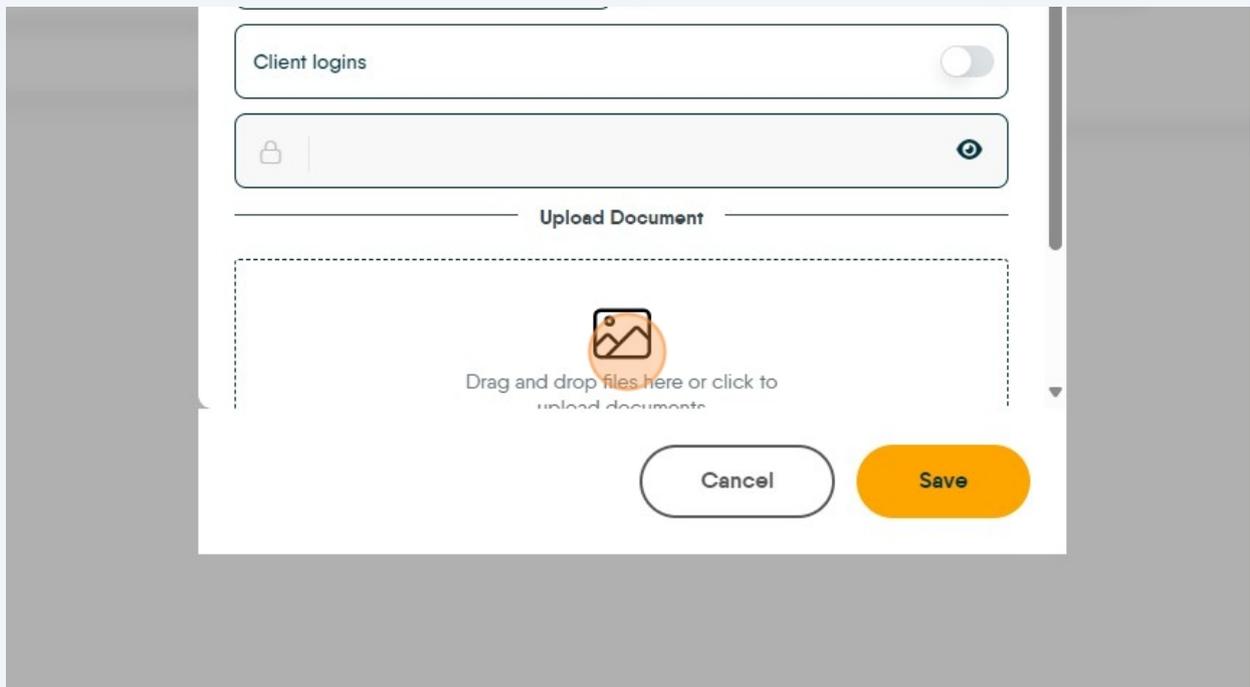
Click "Add Document"

The screenshot shows the 'iam property' dashboard. At the top left is the 'iam property' logo. To its right are navigation links: My day, Lettings, Sales, Accounts, Reporting, and Communication. On the left side, there is a sidebar with a 'Properties' section showing '1' and two items with red 'X' marks: 'Identity Confirmed' and 'Address Confirmed'. Below this are 'Details' and 'Checklist' options. The main content area features a large yellow button with a plus sign and the text 'Add Document' (highlighted with an orange circle). Below the button is a 'Sort Documents' dropdown menu, a search bar with a magnifying glass icon, and a 'Clear filters' link.

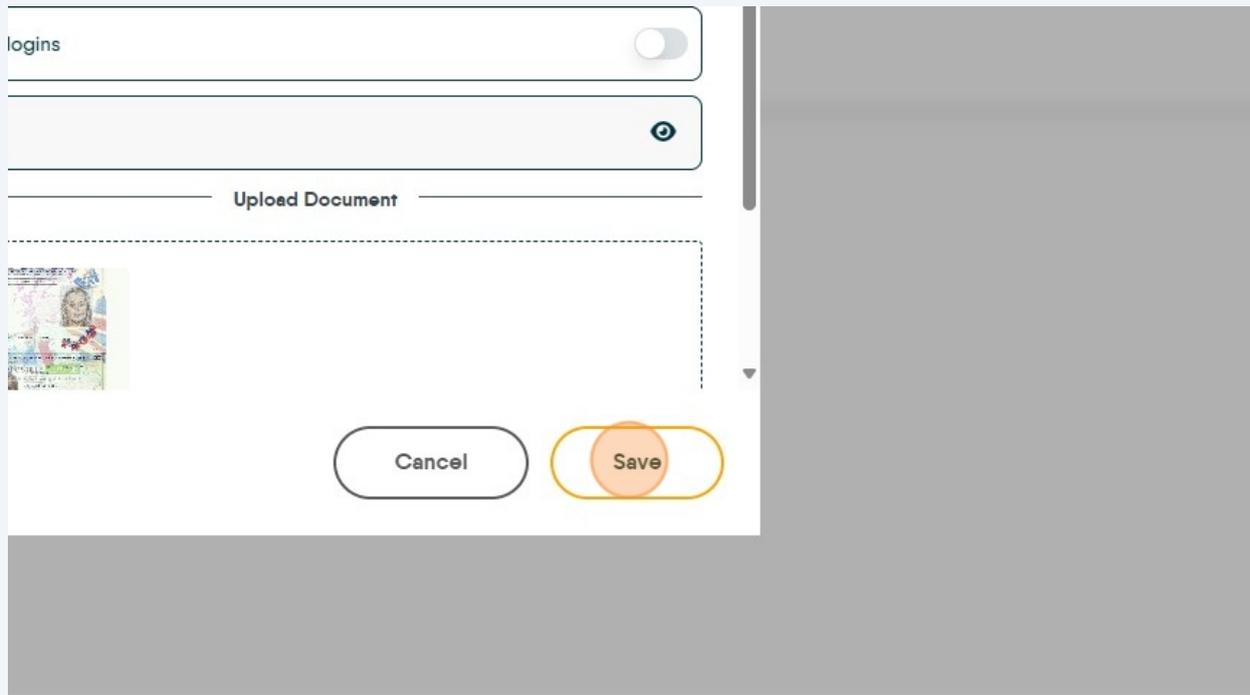
4 From the drop down menu click "Proof of Identity"



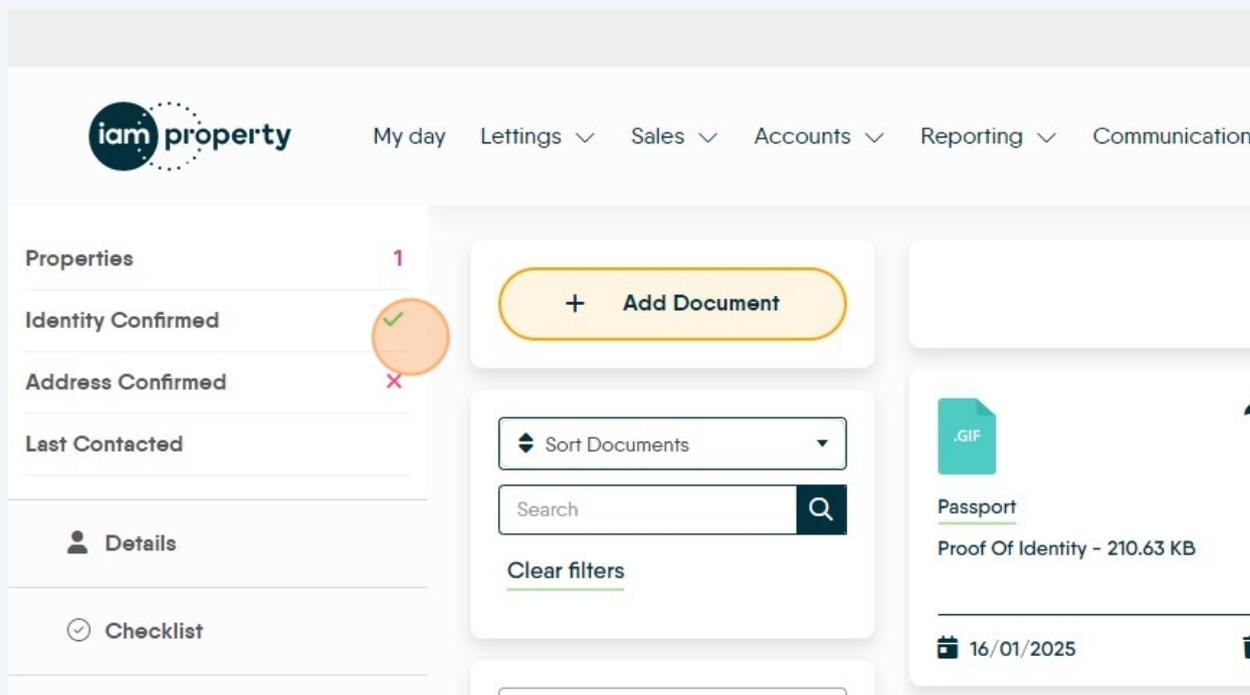
5 Click into the Upload Document screen. This will open a download screen where you can search for and select the document, alternatively the document can be dragged and dropped from a folder or from an email.



6 Click "Save"

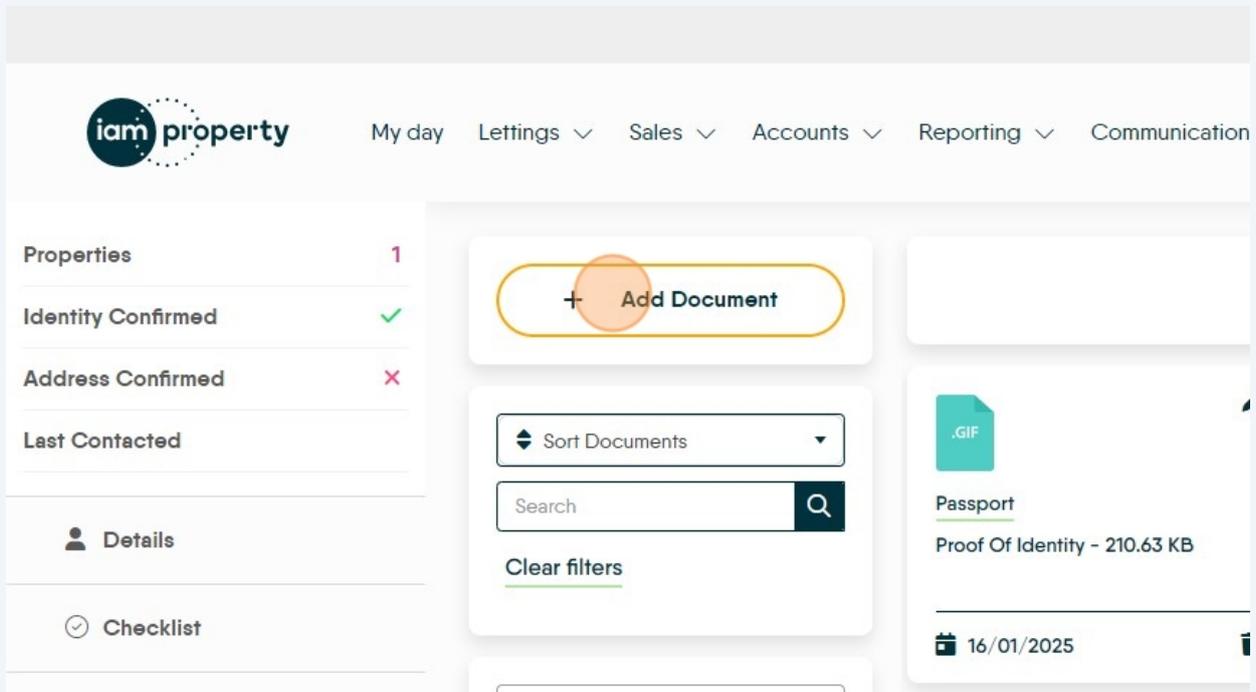


7 You will see the Identity Confirmed option is now a green tick.



To update the Address Confirmed option repeat the process, selecting the Proof of Address option

8 Click "Add Document"



The screenshot shows the 'iam property' dashboard. On the left, there is a sidebar with navigation options: 'Properties' (1), 'Identity Confirmed' (green checkmark), 'Address Confirmed' (red X), 'Last Contacted', 'Details', and 'Checklist'. The main content area features a central panel with a yellow 'Add Document' button highlighted by an orange circle. Below this button are a 'Sort Documents' dropdown menu, a search bar, and a 'Clear filters' link. To the right, a document card is visible with a '.GIF' icon, the title 'Passport', the subtitle 'Proof Of Identity - 210.63 KB', and a date '16/01/2025'.

9 Click and scroll to find "Proof of Address"
Click "Proof of Address"
Click here.

Add Document

Document Type
Unspecified

Compliance Certificate

Unspecified

Contract

Statement

Invoice

Document Type
Unspecified

Spreadsheet

Proof of Identity

Proof of Address

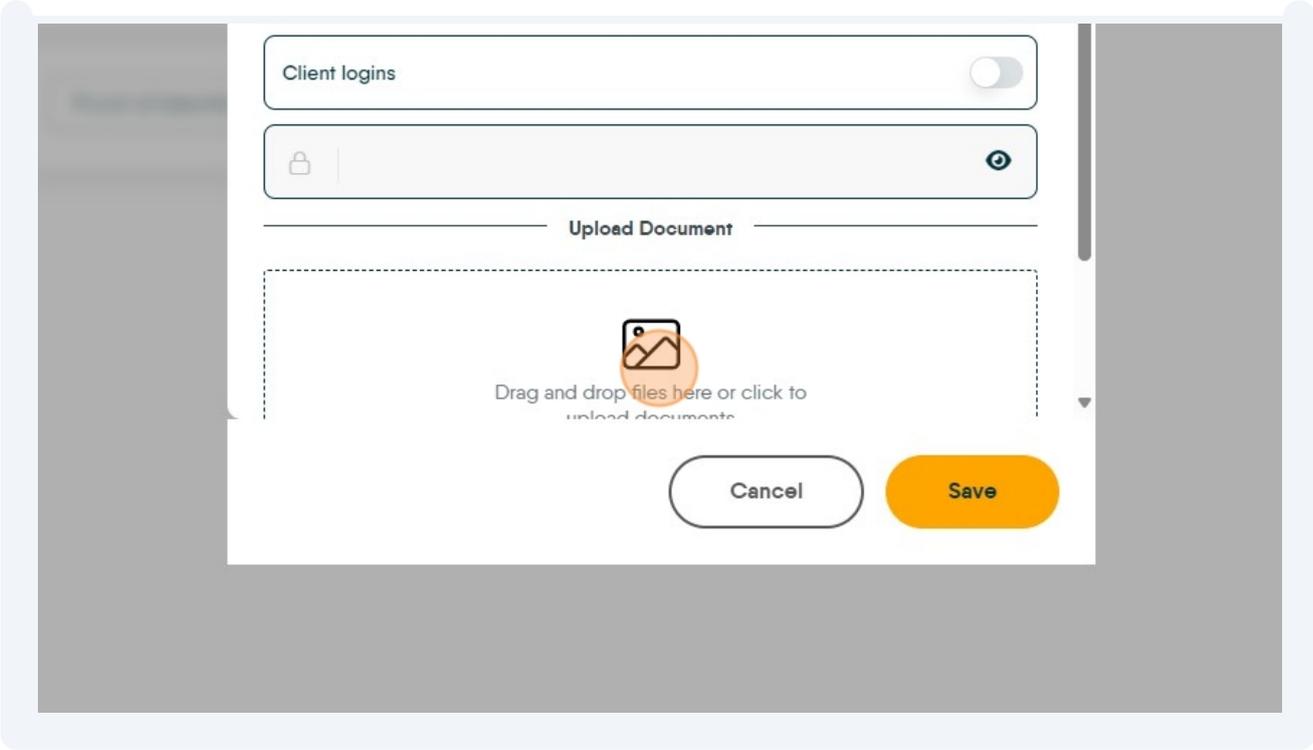
EPC Graph

EPC Certificate

Upload Document

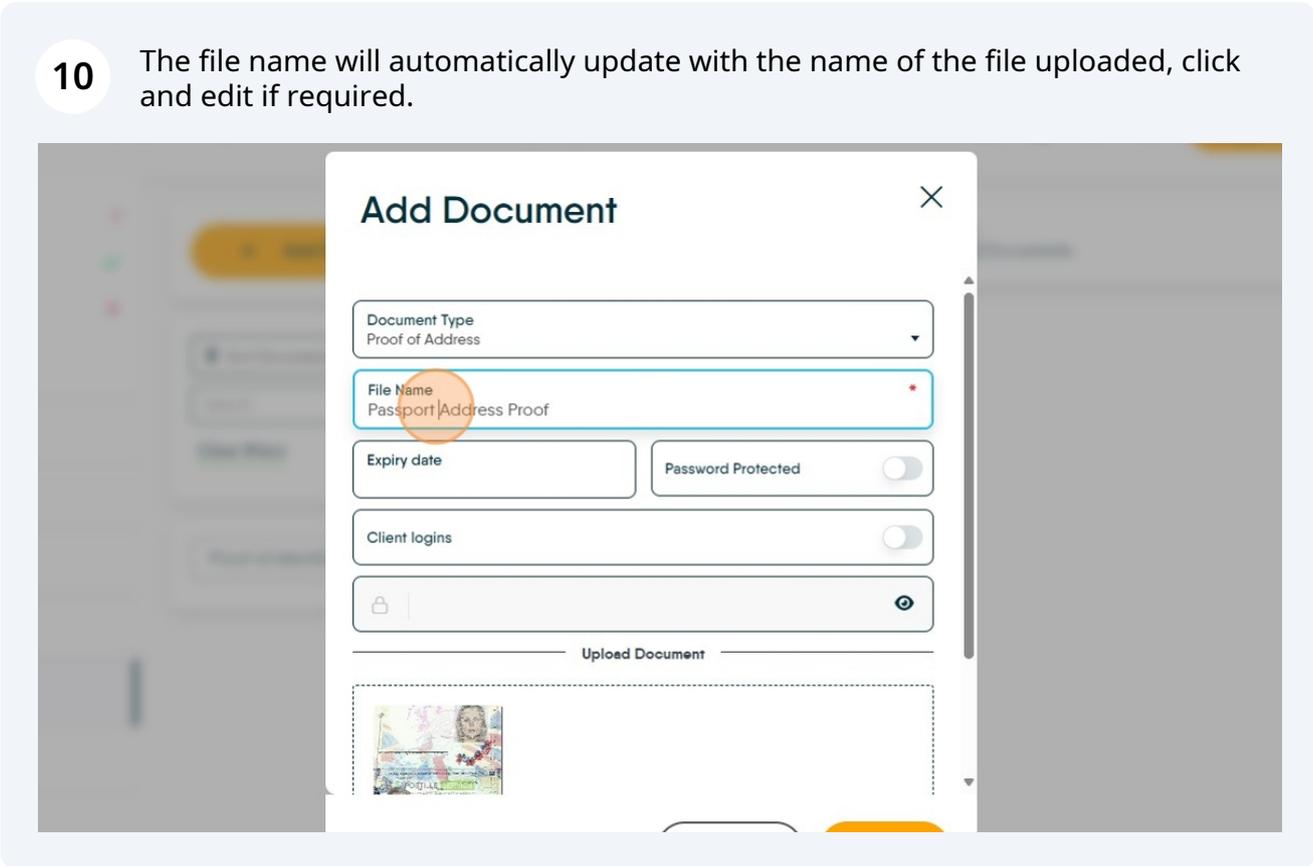


Drag and drop files here or click to

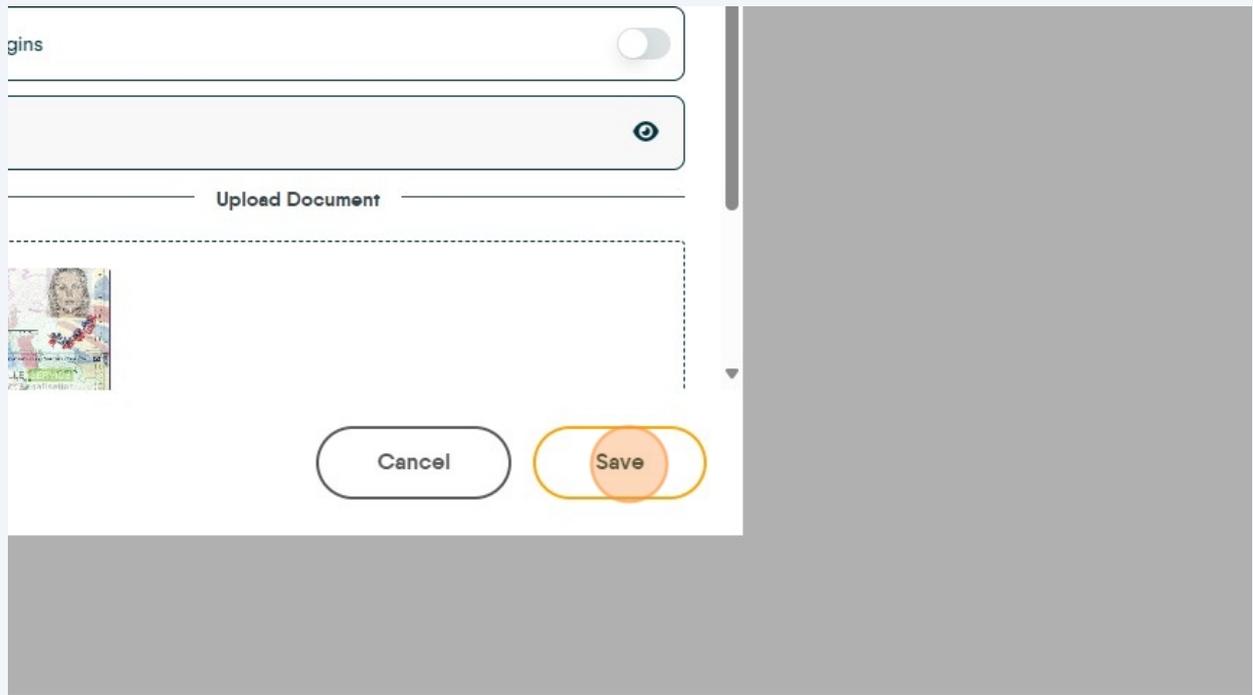


10

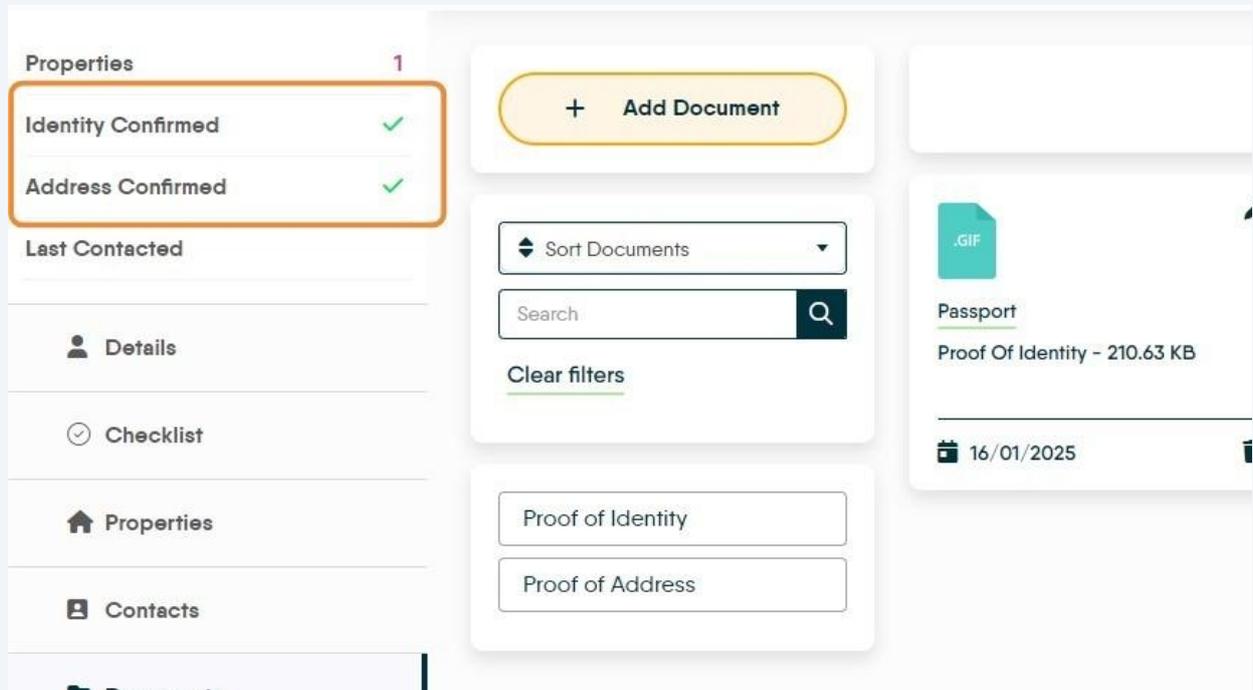
The file name will automatically update with the name of the file uploaded, click and edit if required.



11 Click "Save"



12 Both Identity and Address Confirmed will now be green





Tip! This is the same process to add any document to the Vendor record, or in fact to add a document to any CRM record.