

Creating a Lettings Version of a Sales Property in CRM



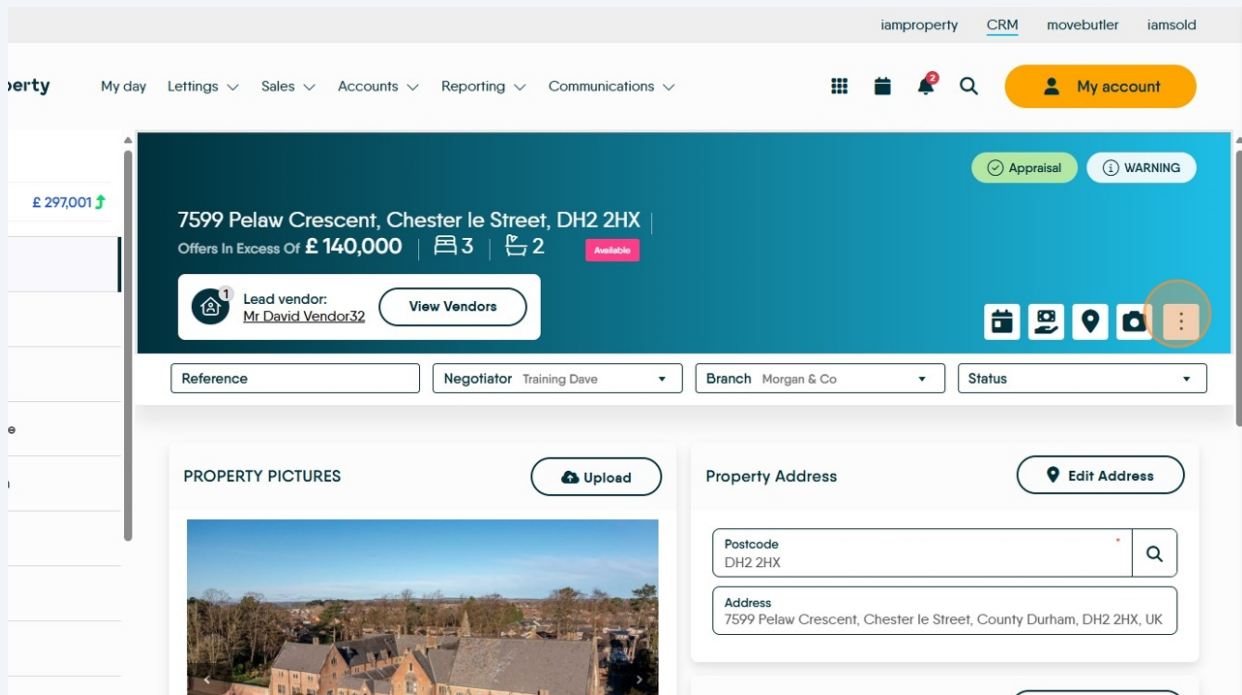
This guide provides a step-by-step process for creating a lettings version of a current Sales property in CRM, ensuring a smooth transition from sales to lettings management.

By following these instructions, users can efficiently input necessary financial data and manage compliance, checking that all required data is added.

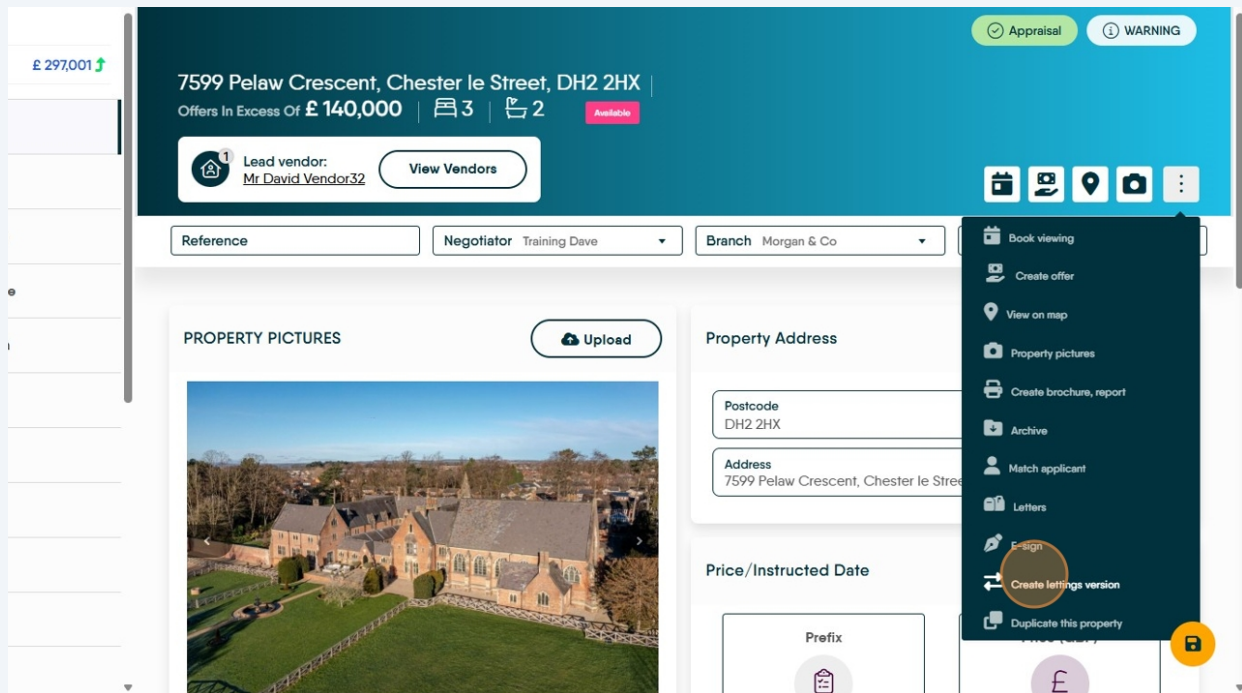
1 Navigate to the property you are adding to the rental portfolio.

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 lists various property management tasks: 'Details', 'Checklist', 'Appraisals', 'Compliance', 'Information', 'Stats', 'Marketing', 'Media', 'Rooms', and 'Portals'. The main content area shows the property details for '7599 Pelaw Crescent, Chester le Street, DH2 2HX'. It includes a price of '£ 297,001' with an upward arrow, a status of 'Available', and a lead vendor 'Mr David Vendor32'. Below this, there are dropdown menus for 'Reference', 'Negotiator' (Training Dave), 'Branch' (Morgan & Co), and 'Status'. The 'PROPERTY PICTURES' section shows an aerial view of the property with an 'Upload' button. The 'Property Address' section has fields for 'Postcode' (DH2 2HX) and 'Address' (7599 Pelaw Crescent, Chester le Street, County Durham, DH2 2HX, UK), both with 'Edit Address' buttons. The 'Price/Instructed Date' section shows a 'Currency' dropdown set to 'GBP'.

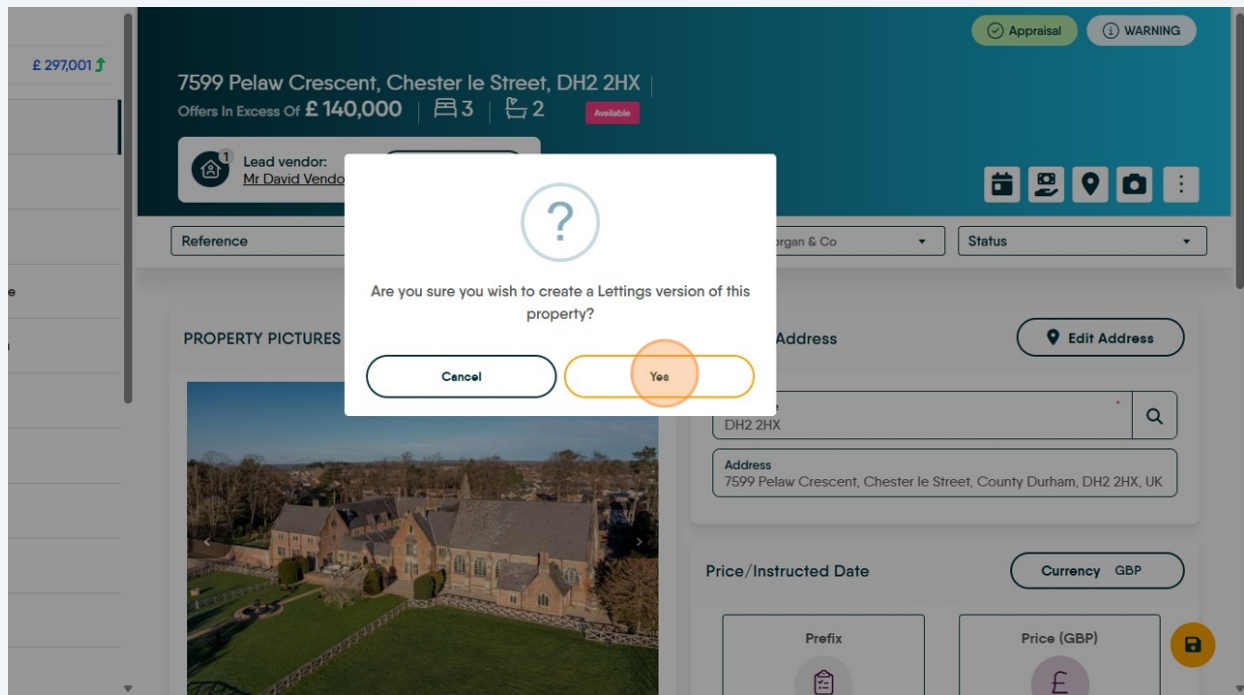
2 Click the 3-dot menu.



3 Click "Create Lettings version"



4 Click "Yes"



5 The basic lettings record will now have been created, the Vendor record has also been duplicated here to be the Landlord Record. There are still items to check and update as shown below.

Checking the New Lettings Record

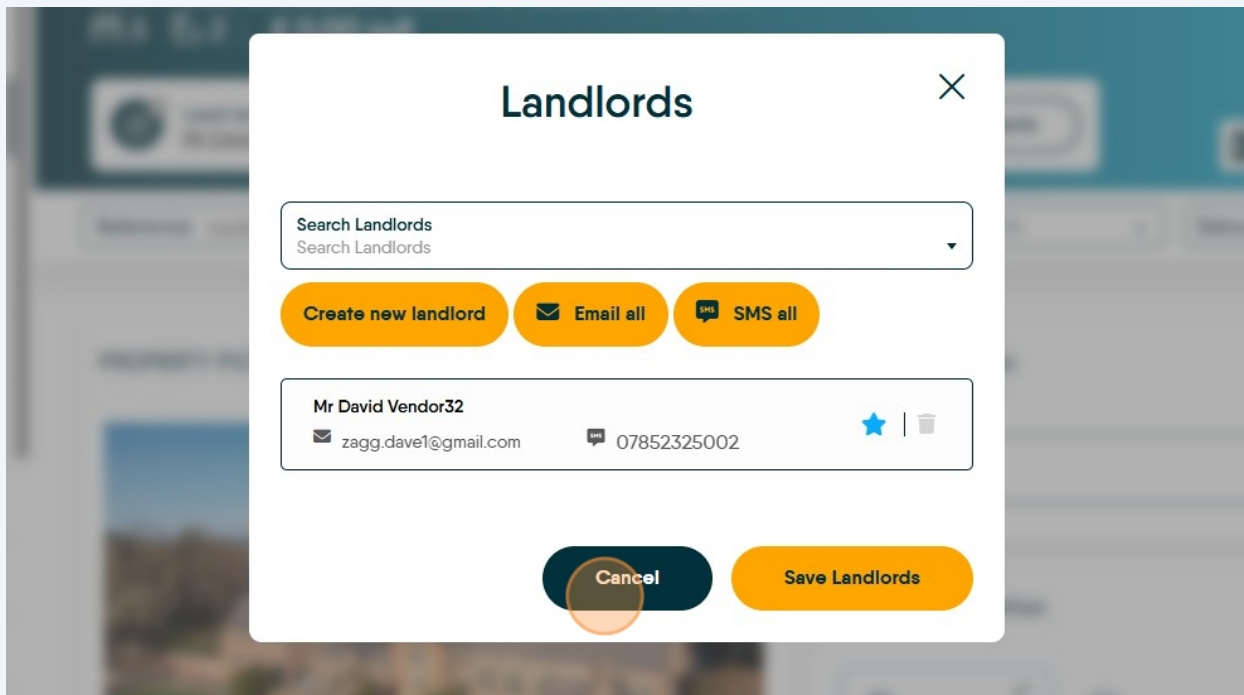
6 Click "View landlords"

The screenshot shows the iamproperty CRM interface. The top navigation bar includes 'My day', 'Lettings', 'Sales', 'Accounts', 'Reporting', and 'Communications'. The left sidebar lists various modules: Live Jobs, EPC Rating, Details, Checklist, Appraisals, Inspections, Accounts, Compliance, Information, and maintenance. The main content area displays a property listing for '7599 Pelaw Crescent, Chester le Street, DH2 2HX' with 3 bedrooms and 2 bathrooms, and a price of £0.00 null. Below the property details, there are buttons for 'View Landlords' and 'View Tenants'. The 'View Landlords' button is highlighted with an orange circle. The bottom section shows 'PROPERTY PICTURES' with an 'Upload' button and 'Property Address' with an 'Edit Address' button. The 'Property Information' section includes a 'Postcode' field with 'DH2 2HX' and a 'Property Information' section with a 'Checklist' icon, a '£' symbol, and a 'P' icon.

7 Click here to check the Landlord details, clicking on the Landlord name will take you to the new Landlord record, where you can view and check all the details added.

The screenshot shows a modal window titled 'Landlords'. It features a search bar with the placeholder text 'Search Landlords'. Below the search bar are three buttons: 'Create new landlord', 'Email all', and 'SMS all'. A list of landlords is displayed below these buttons. The first entry is 'Mr David Vendor32' with an email address 'zagg.dave1@gmail.com' and a phone number '07852325002'. The name 'Mr David Vendor32' is highlighted with an orange circle. At the bottom of the modal are two buttons: 'Cancel' and 'Save Landlords'.

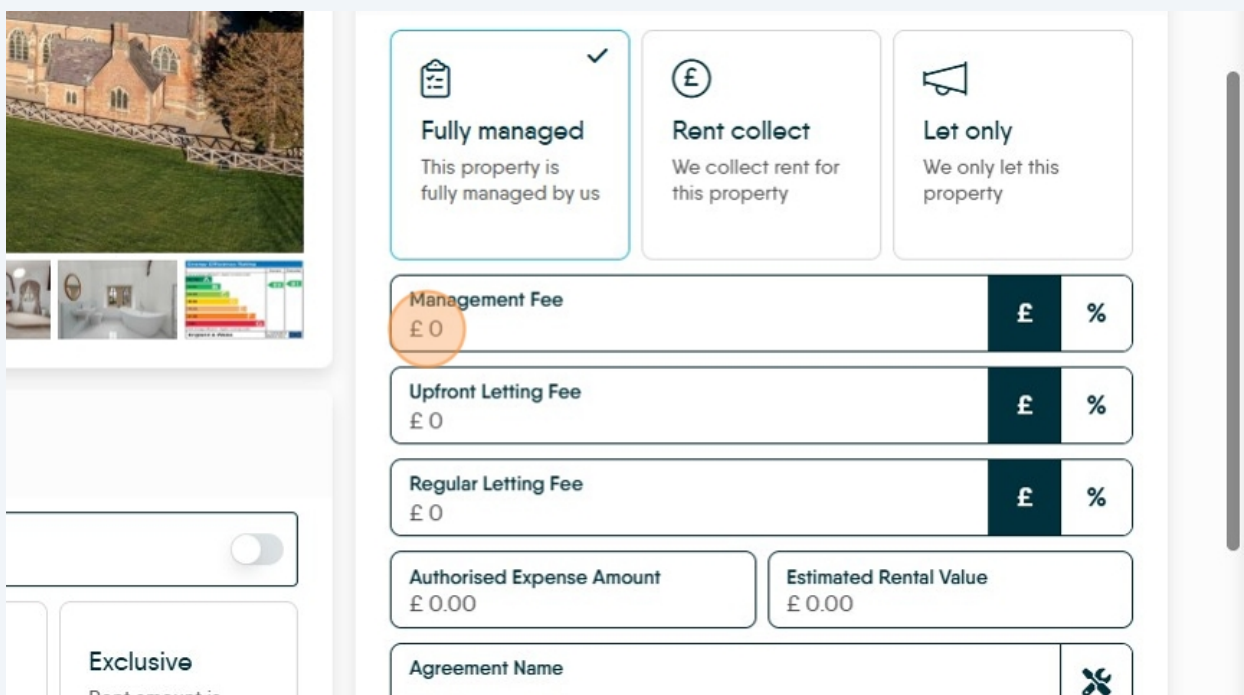
8 Click "Cancel"



9 Adding the Management Fees etc

Click to set the Management Type.

Click the "Enter amount" field and add the Management fee in £ or percentage of rent.



10

Click the "Enter amount" field and add the Upfront Letting fee in £ or percentage of rent. This is charged once only at the start of a new tenancy.



isive
amount is
ive of VAT

This property is fully managed by us		We collect rent for this property		We only let this property	
Management Fee			£	%	
10.00					
Upfront Letting Fee			£	%	
£ 0					
Regular Letting Fee			£	%	
£ 0					
Authorised Expense Amount		Estimated Rental Value			
£ 0.00		£ 0.00			
Agreement Name					

11

Click the "Enter amount" field and add the Regular Letting fee in £ or percentage of rent. This is charged monthly in addition to the rent.




Exclusive
Rent amount is
exclusive of VAT


Fully managed This property is fully managed by us		Rent collect We collect rent for this property		Let only We only let this property	
Management Fee			£	%	
10.00					
Upfront Letting Fee			£	%	
£ 430					
Regular Letting Fee			£	%	
£ 0					
Authorised Expense Amount		Estimated Rental Value			
£ 0.00		£ 0.00			
Agreement Name					


12

Postcode
DH2 2HX

Property Information


Fully managed
 This property is fully managed by us


Rent collect
 We collect rent for this property



Let only
 We only let this property

Management Fee		
10.00	£	%

Upfront Letting Fee		
£ 430	£	%

Regular Letting Fee		
£ 0	£	%

Authorised Expense Amount	Estimated Rental Value
£ 0.00	£ 0.00

Agreement Name	
	

13

B
Postcode
DH2 2HX

Property Information

Fully managed

This property is fully managed by us

Rent collect

We collect rent for this property

Lett only

We only let this property

COMMERCIAL

Commercial Unit ☐

Exempt ✓
 Rent amount is exempt from VAT

Inclusive
 Rent amount is inclusive of VAT

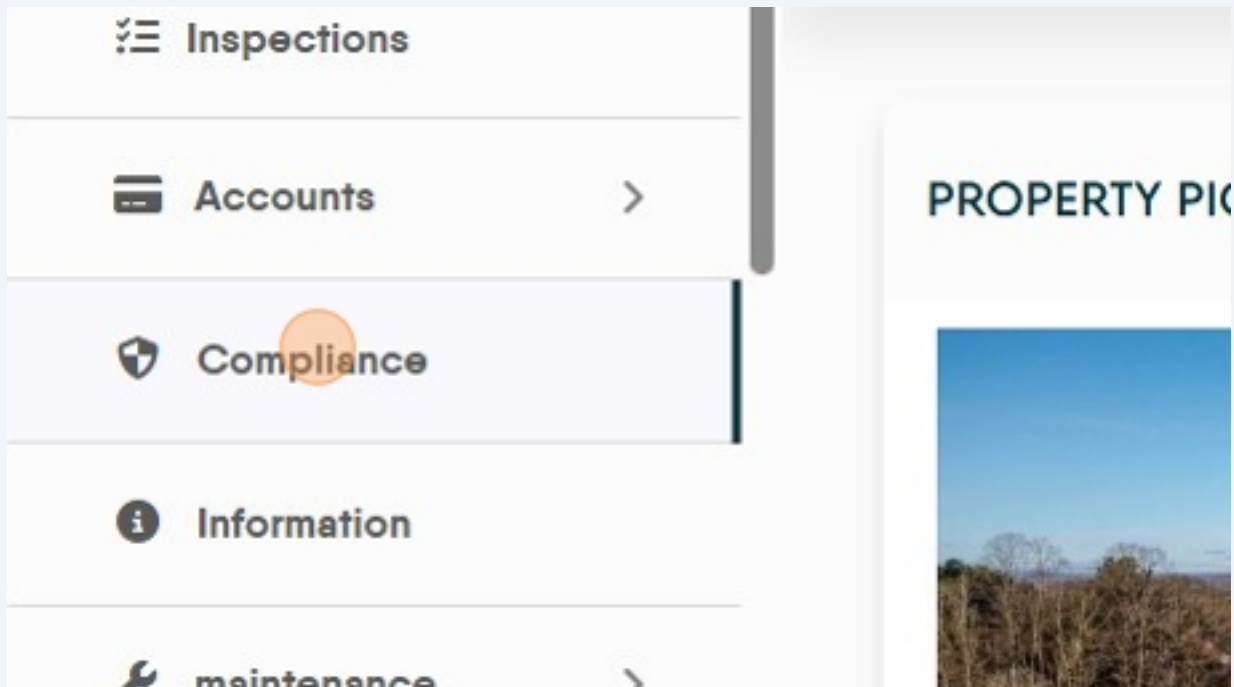
Exclusive
 Rent amount is exclusive of VAT

Management Fee	£	%
10.00		
Upfront Letting Fee	£	%
£ 430		
Regular Letting Fee	£	%
£ 0		
Authorised Expense Amount		
£ 300.00		
Estimated Rental Value		
£ 0.00		
Agreement Name		

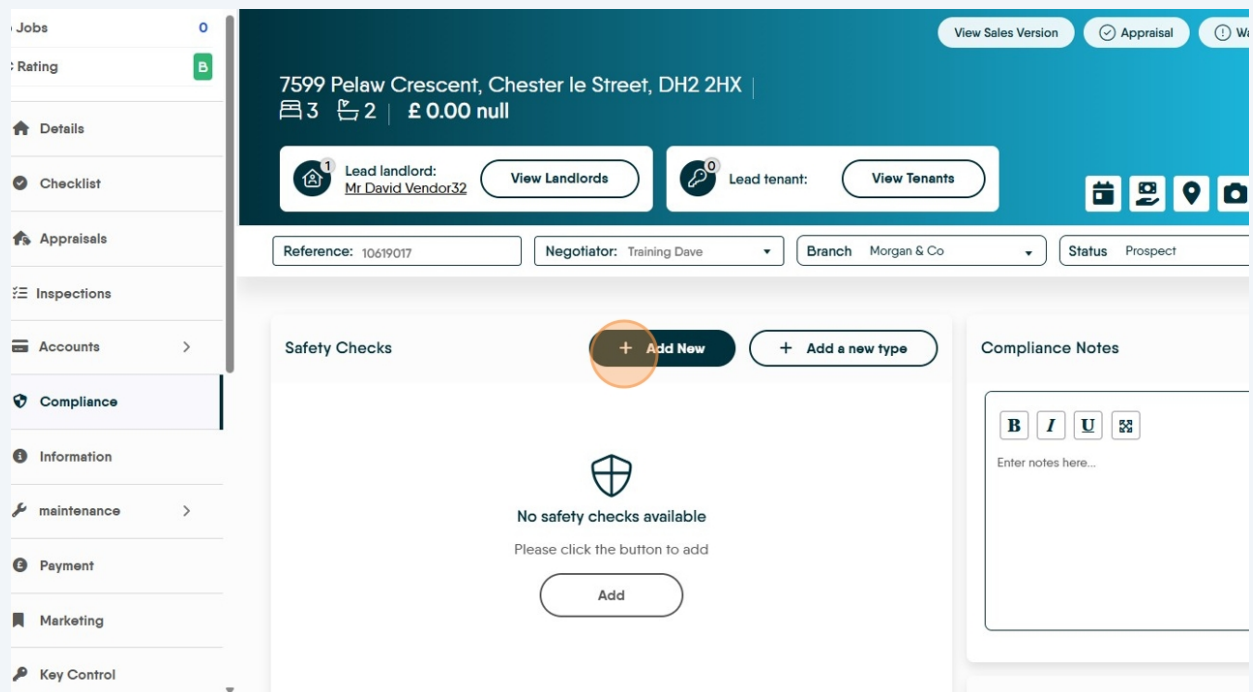
Build Agreement Name

OTHER

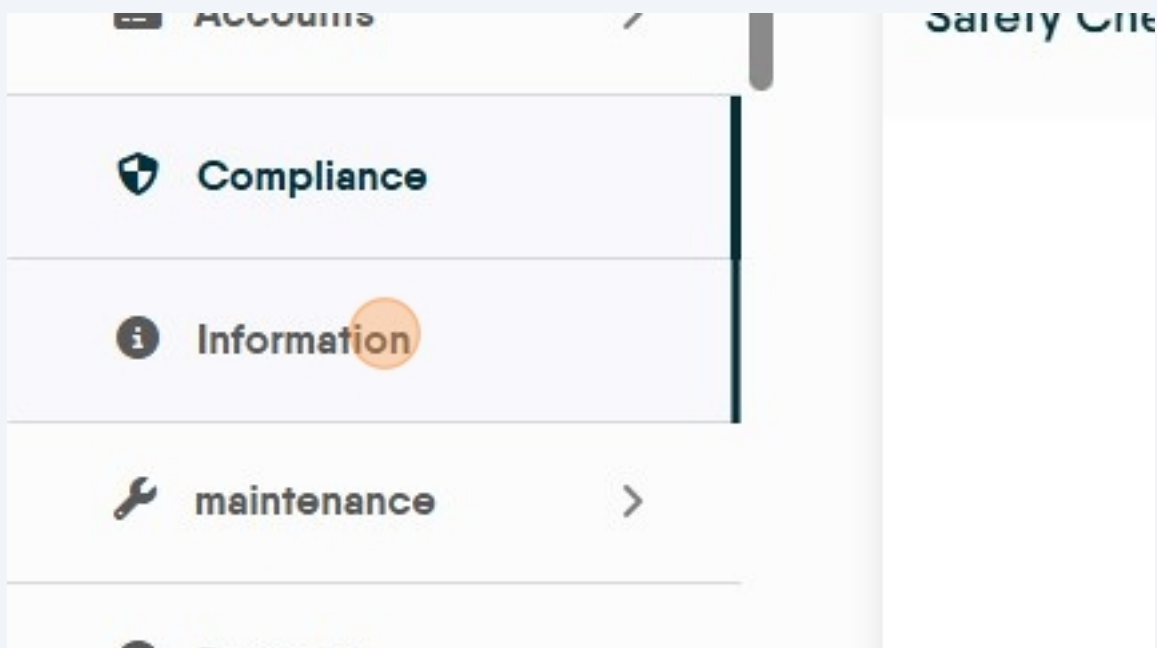
14 Click "Compliance"



15 **Compliance** Click here and add or update any compliance information that is required for rental properties.



16 Click "Information"



17 **Property Information** This section allows various pieces of information to be collected about the property that may be of use to a tenant. This information (excluding 'Mortgage') is also shown in the Tenant Portal.

A screenshot of the 'Property Information' form in a web application. The form is divided into three main sections: 'Meters', 'Information', and 'Mortgage'. The 'Meters' section contains four cards for 'Electric meter', 'Gas meter', 'Water meter', and 'Oil meter', each with a 'Serial Number' field. The 'Information' section contains several dropdown menus and a toggle switch. The 'Mortgage' section contains dropdown menus and a table for mortgage details. An orange circle highlights the 'Gas meter' card in the 'Meters' section.

Meters

Notes

Electric meter
Serial Number

Gas meter
Serial Number

Water meter
Serial Number

Oil meter
Serial Number

Information

UK Council
Refuse Collection Day
Collection Point
Stopcock Location
Council Tax Band C
Exempt

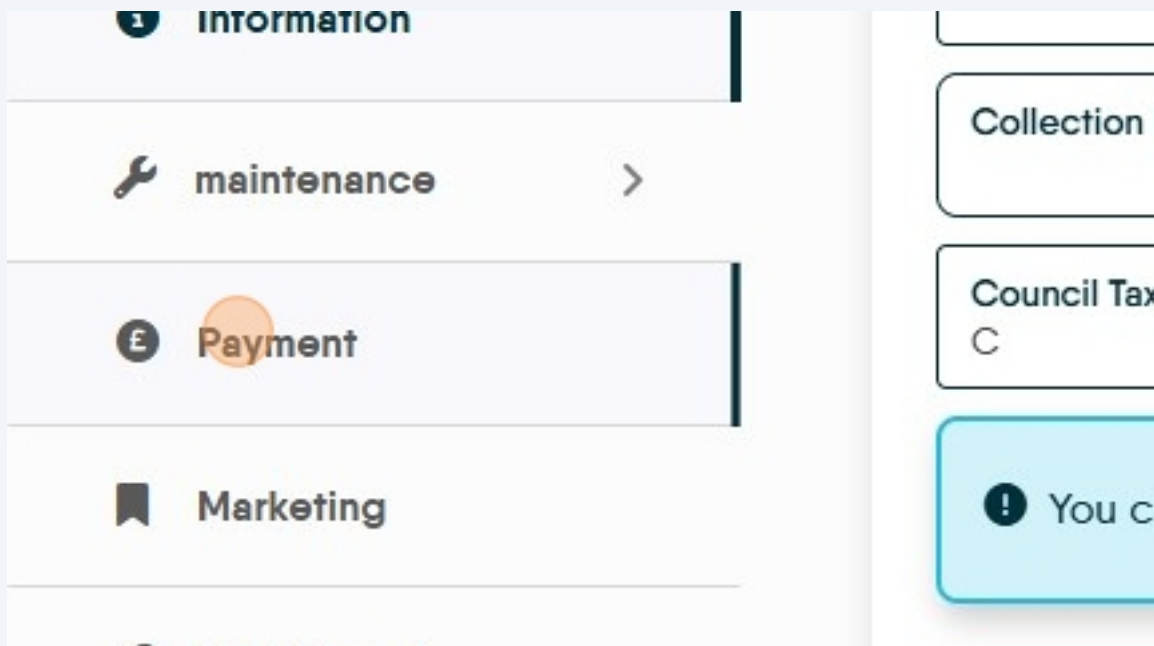
You can check the property Council Tax Band at [this link](#)

Mortgage

Provider
Term
Total Value £0
Deposit £0
Interest Rate (%) 0
End Date

Term	Monthly	Total
Years	£ 0.00	£ 0.00

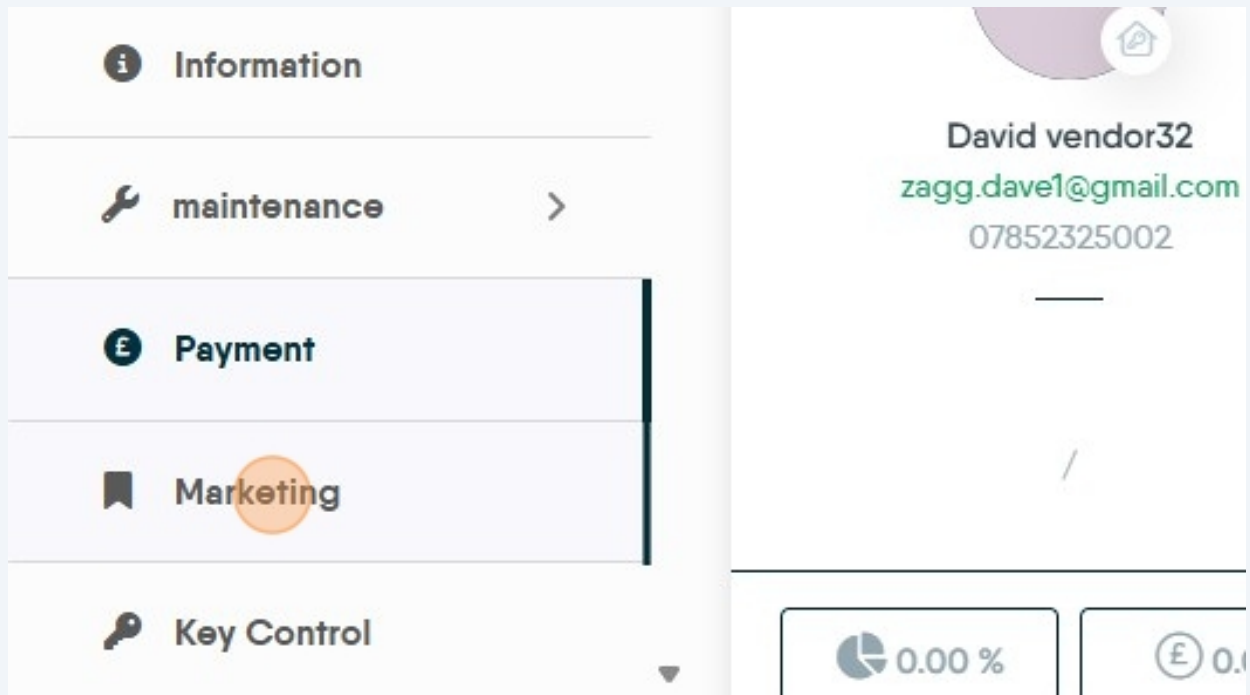
18 Click "Payment"



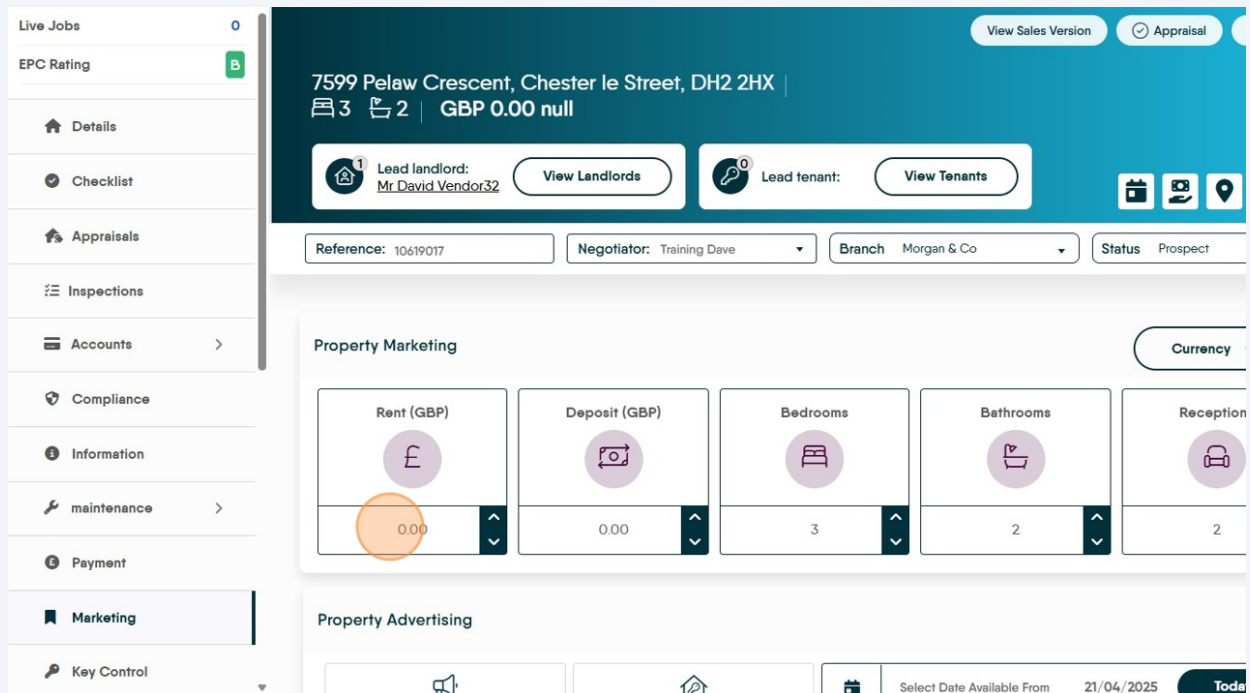
19 **Payment** Click here and update the bank details for the Landlord, this allows electronic payments to be created from CRM.

Also if a float is to be created it can be added here, if fixed payments are made to the Landlord these can be set also.

20 Click "Marketing"



21 Property Marketing Click here to set the rental amount



22 Click here to set the deposit.

The screenshot shows the 'Property Marketing' section of a software interface. The top header displays the property address '7599 Pelaw Crescent, Chester le Street, DH2 2HX' and the price 'GBP 1,400'. Below this, there are buttons for 'View Landlords' and 'View Tenants'. The 'Property Marketing' section contains several input fields: 'Rent (GBP)' with a value of '1,400.00', 'Deposit (GBP)' with a value of '0.00' (highlighted with an orange circle), 'Bedrooms' with a value of '3', 'Bathrooms' with a value of '2', and 'Reception' with a value of '2'. Below this is the 'Property Advertising' section, which is currently empty. The bottom of the interface shows a navigation bar with icons for 'Live Jobs', 'EPC Rating', 'Details', 'Checklist', 'Appraisals', 'Inspections', 'Accounts', 'Compliance', 'Information', 'Maintenance', 'Payment', 'Marketing', and 'Key Control'.

23 **Property Advertising** Scroll down to this section and add the advertising data for the Property.

Set the Advertising address by clicking on the tool icon. Set the Advertising status and if your landlord allows Pets or Smokers.

The screenshot shows the 'Property Advertising' section of the software interface. It contains several input fields and checkboxes: 'Advertise?' (checkbox), 'New build?' (checkbox), 'Board Status' (dropdown menu), 'Let Type' (dropdown menu), 'Advertising Address' (text field with a tool icon), 'Advertising Status' (dropdown menu), 'Advertising Url' (text field), 'Virtual Tour Url 1' (text field), 'Virtual Tour Url 2' (text field), 'Premium Listing' (dropdown menu), 'Pets?' (checkbox), 'Smokers?' (checkbox), and 'Tenancy Info' (text field). The 'Advertising Address' field is highlighted with an orange box, and a callout arrow points to it with the text 'Click Here to set advertising address'. Below this section is the 'Matching Property' section, which is currently empty.

24

Matching Property in this section set the property lease details, Property type and any other options you have available.

All these options impact Property Matching, items set in here will be matched to Applicant records to find accurate matches for properties.

The screenshot shows a web application interface for 'Matching Property'. The form is organized into several sections:

- Lease Period:** A dropdown menu set to 'Monthly'.
- Min Lease Months:** A text input field containing '6'.
- Max Lease Months:** A text input field containing '12'.
- Property Type:** A dropdown menu set to 'Semi-Detached House'.
- Property Type Zoopla:** A dropdown menu set to 'Semi Detached'.
- Property Attributes:** A section with four toggle switches:
 - Pets Allowed: ☐
 - Furnished: ☐
 - Part Furnished: ☐
 - Unfurnished: ☐
- Property Age:** A section with four toggle switches:
 - Period: ☐
 - Pre-war: ☐
 - Post-war: ☐
 - Modern: ☐
 - New-build: ☐
- Property Style:** A section with five toggle switches:
 - 30's Semi: ☐
 - Addison Homes: ☐
 - Georgian: ☐
 - Victorian: ☐
 - Tudor: ☐
- Other Criteria:** A section with one toggle switch:
 - Potential Vendor: ☐

The form is displayed within a sidebar layout, with a vertical scrollbar on the right side. A small orange circular icon with a white 'B' is visible in the bottom right corner of the form area.

25

Descriptions the property descriptions will show here as will any Key Features added in the previous record. These need to be checked for accuracy and remove any relation to Sales.

The screenshot shows a web application interface for editing property information. On the left is a vertical sidebar with a list of items, each with a small icon and a right-pointing arrow. The main content area is divided into two sections. The top section is titled "Descriptions" and has a character count of "Characters: 1/20,000". It contains a tabbed interface with tabs for "Main", "Summary", "Extra 1", "Extra 2", and "Advertising Sms Message". The "Main" tab is active, showing a text editor with bold (B), italic (I), underline (U), and link icons, and a placeholder text "Enter Property Main Description". The bottom section is titled "Key Features Added - (max 10 for portals / feeds)" and has a character count of "Characters: 0". It contains a text input field with the placeholder "Click here and start typing the Key Features..." and a right-pointing arrow icon. Below the input field is a list of key features. The first item is "Kitchen" with a blue square icon containing the number "1". Below "Kitchen" is a user profile for "Training Dave" with a pink circular icon containing "TD", the date "28 January", and a trash can icon. A yellow circular icon with a document symbol is located in the bottom right corner of the main content area.

Descriptions Characters: 1/20,000

Main Summary Extra 1 Extra 2 Advertising Sms Message

B *I* U

Enter Property Main Description

Key Features Added - (max 10 for portals / feeds) Characters: 0

Key Features

Click here and start typing the Key Features...

1

Kitchen

TD Training Dave
28 January