

Creating a Lettings Version of a Sales Property in CRM



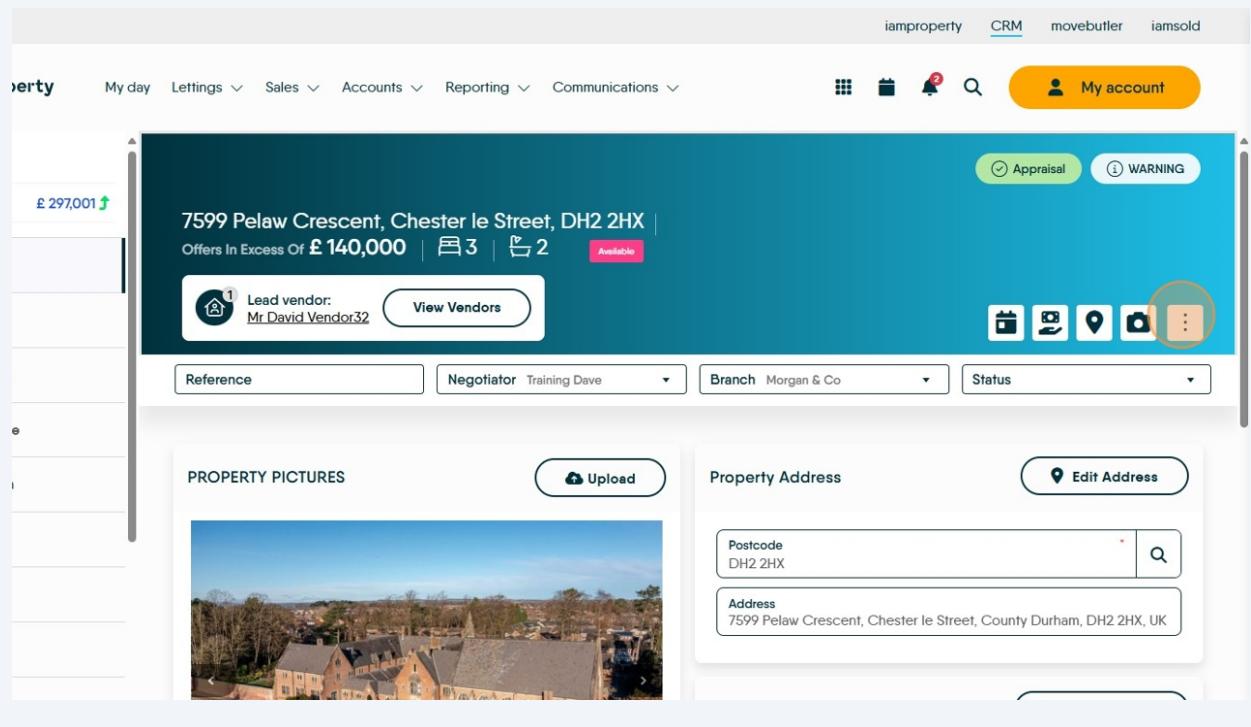
This guide provides a step-by-step process for creating a lettings version of a current Sales property in CRM, ensuring a smooth transition from sales to lettings management.

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 shows the iam property CRM interface. On the left, a sidebar lists various tabs: Details, Checklist, Appraisals, Compliance, Information, Stats, Marketing, Media, Rooms, and Portals. The main content area displays a property record for '7599 Pelaw Crescent, Chester le Street, DH2 2HX'. The record shows an offer of '£ 140,000' and '3' bedrooms. A 'Available' button is visible. Below this, a section for 'PROPERTY PICTURES' shows a large image of a large, traditional-style house with a tiled roof and a surrounding garden. To the right, sections for 'Property Address' (Postcode: DH2 2HX, Address: 7599 Pelaw Crescent, Chester le Street, County Durham, DH2 2HX), 'Price/Instructed Date', and 'Currency' (set to GBP) are visible. The top navigation bar includes links for 'My day', 'Lettings', 'Sales', 'Accounts', 'Reporting', 'Communications', and 'My account'. A yellow 'My account' button is highlighted.

2 Click the 3-dot menu.



£ 297,001 

7599 Pelaw Crescent, Chester le Street, DH2 2HX | Offers In Excess Of £ 140,000 | 3 | 2 Available

Lead vendor: Mr David Vendor32 [View Vendors](#)

Appraisal  WARNING

My account

My day Lettings Sales Accounts Reporting Communications

Reference Negotiator Training Dave Branch Morgan & Co Status

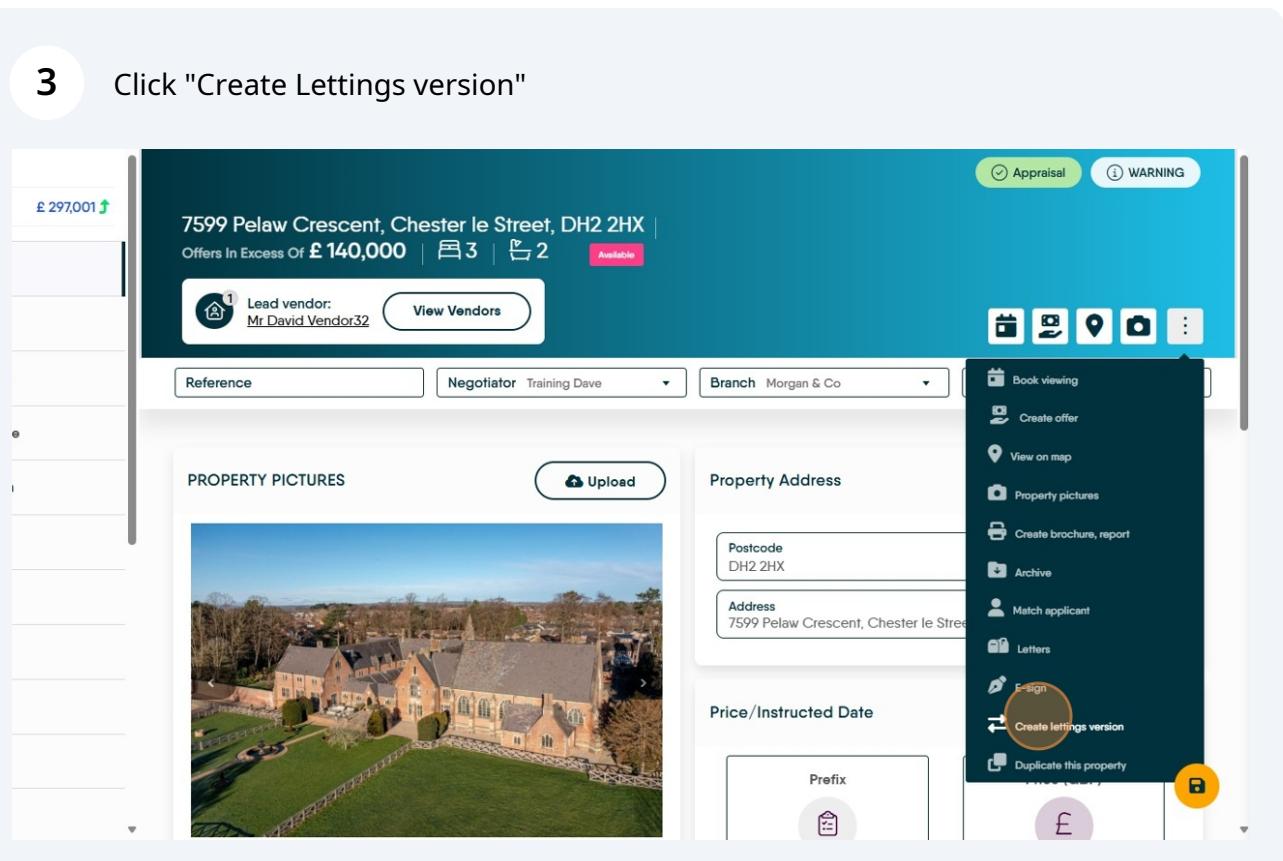
PROPERTY PICTURES  Upload

Property Address  Edit Address

Postcode DH2 2HX 

Address 7599 Pelaw Crescent, Chester le Street, County Durham, DH2 2HX, UK

3 Click "Create Lettings version"



£ 297,001 

7599 Pelaw Crescent, Chester le Street, DH2 2HX | Offers In Excess Of £ 140,000 | 3 | 2 Available

Lead vendor: Mr David Vendor32 [View Vendors](#)

Appraisal  WARNING

PROPERTY PICTURES  Upload

Property Address

Postcode DH2 2HX

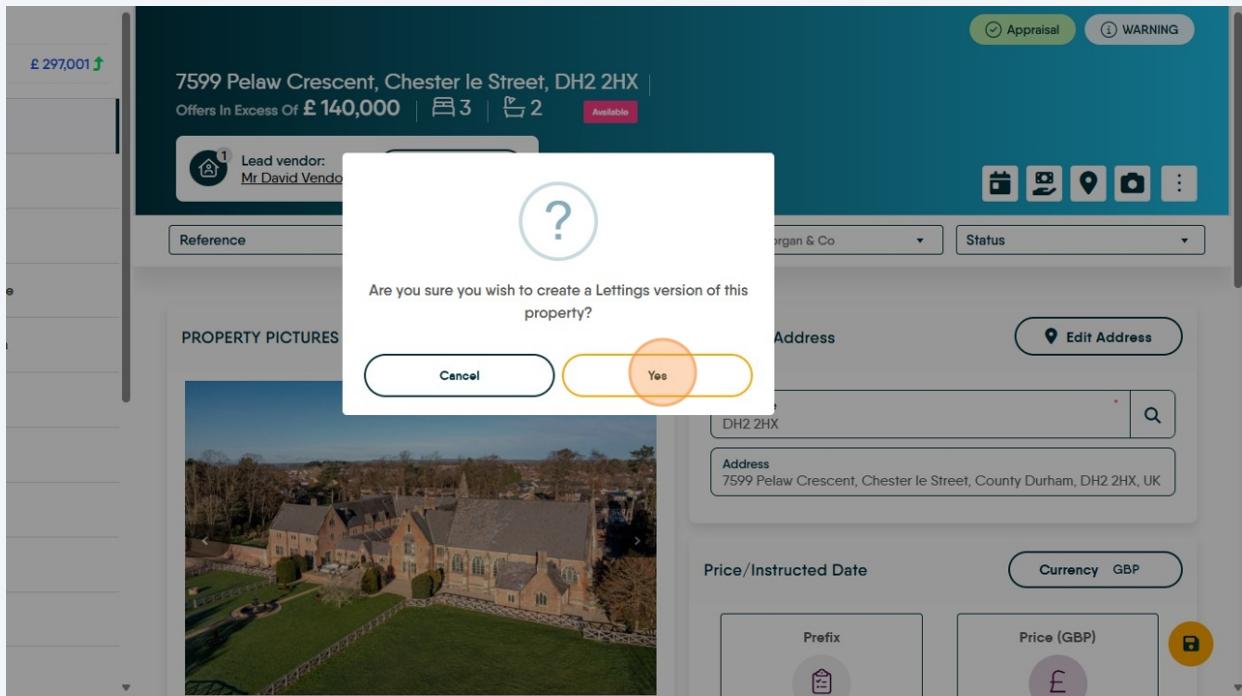
Address 7599 Pelaw Crescent, Chester le Street, County Durham, DH2 2HX, UK

Price/Instructed Date

Prefix 

 Book viewing
Create offer
View on map
Property pictures
Create brochure, report
Archive
Match applicant
Letters
E-sign  Create lettings version 
Duplicate this property 

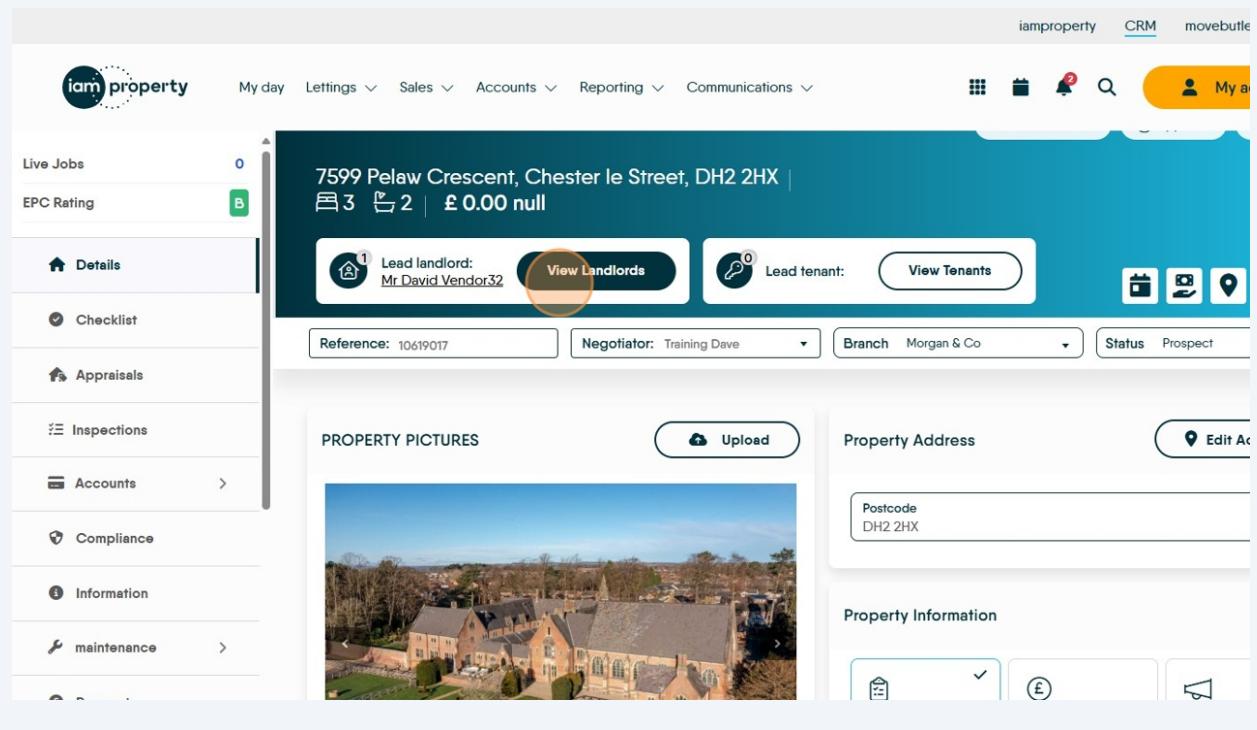
4 Click "Yes"



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.

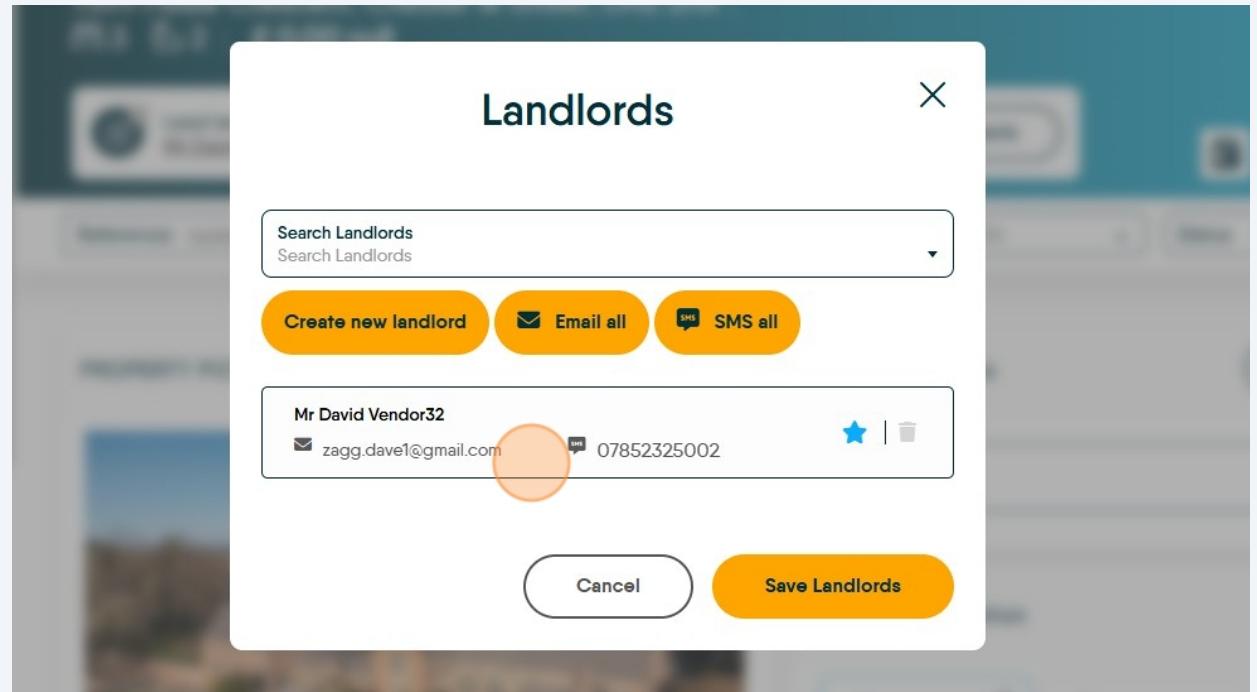
Checking the New Lettings Record

6 Click "View landlords"



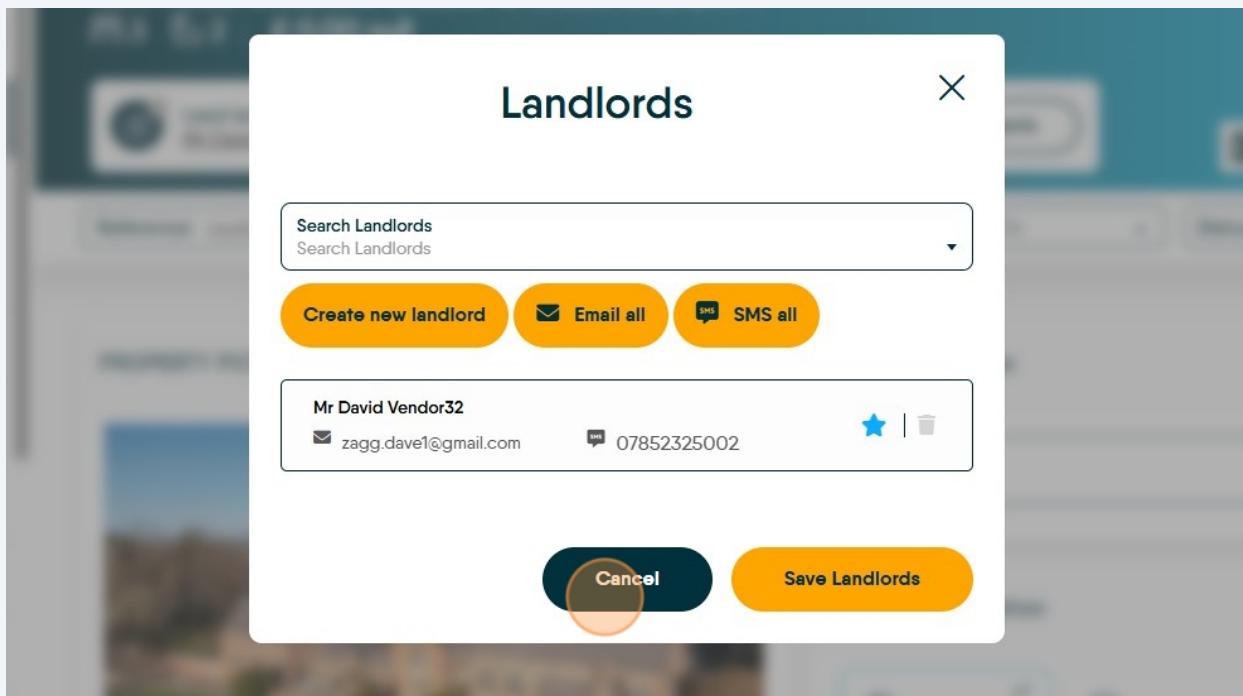
The screenshot shows the iamproperty software interface. At the top, there are navigation links: My day, Lettings, Sales, Accounts, Reporting, Communications, and a CRM link. Below the navigation is a header with the property address: 7599 Pelaw Crescent, Chester le Street, DH2 2HX, and details: 3 bedrooms, 2 bathrooms, and £0.00 null. On the left, there is a sidebar with various tabs: Details, Checklist, Appraisals, Inspections, Accounts, Compliance, Information, and maintenance. The 'Details' tab is selected. In the main content area, there is a 'PROPERTY PICTURES' section with an 'Upload' button and a thumbnail image of a property. To the right, there is a 'Property Address' section with a 'Postcode' field containing DH2 2HX, and a 'Property Information' section with dropdown menus for property type, price, and rental type. At the top of the main content area, there are buttons for 'View Landlords' (which is circled in yellow), 'View Tenants', and other property details. Below these buttons are reference numbers (10619017), negotiator (Training Dave), branch (Morgan & Co), and status (Prospect).

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' with a close button 'X'. Inside the modal, there is a search bar labeled 'Search Landlords' with a dropdown arrow. Below the search bar are three buttons: 'Create new landlord' (yellow), 'Email all' (yellow), and 'SMS all' (yellow). A list of landlords is displayed, with the first entry being 'Mr David Vendor32'. This entry includes an email address (zagg.dave1@gmail.com), a phone number (07852325002), a star rating icon, and a trash bin icon. At the bottom of the modal, there are 'Cancel' and 'Save Landlords' buttons.

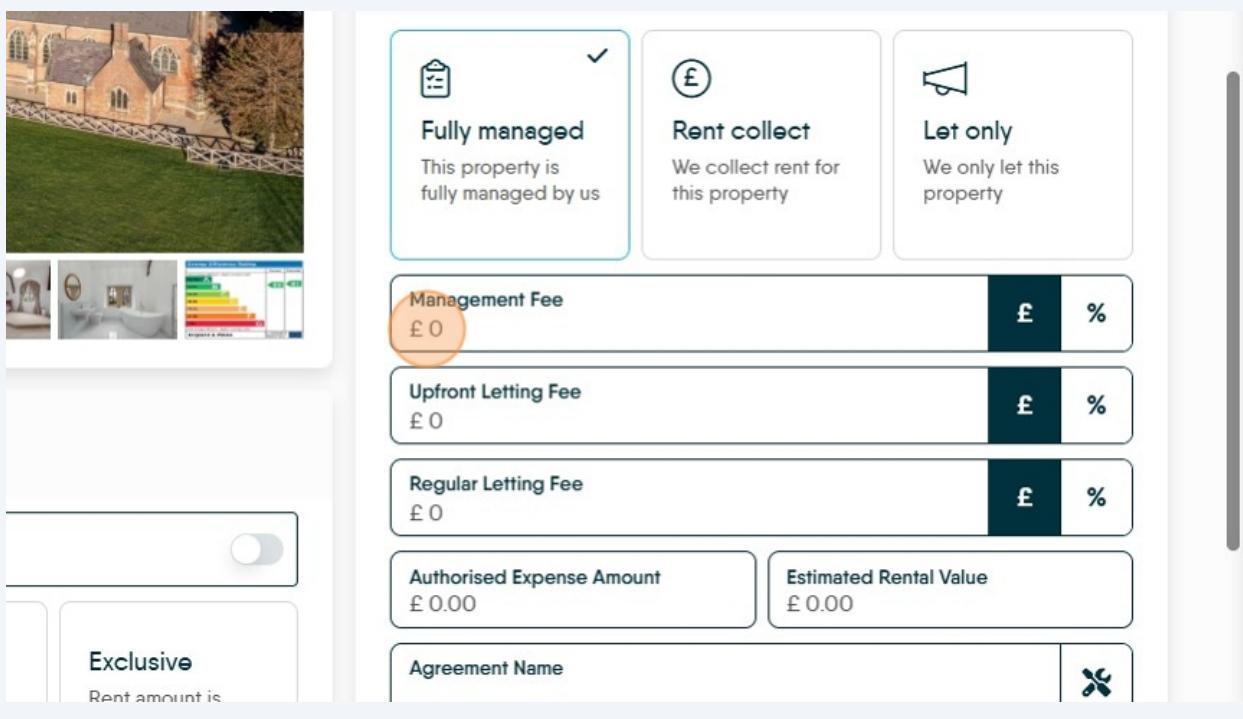
8 Click "Cancel"



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.



Exclusive
Rent amount is exclusive of VAT

This property is fully managed by us	We collect rent for this property	We only let this property
Management Fee 10.00	£ <input type="checkbox"/> % <input type="checkbox"/>	
Upfront Letting Fee £ 0	£ <input type="checkbox"/> % <input type="checkbox"/>	
Regular Letting Fee £ 0	£ <input type="checkbox"/> % <input type="checkbox"/>	
Authorised Expense Amount £ 0.00	Estimated Rental Value £ 0.00	
Agreement Name <input type="text"/> 		

11

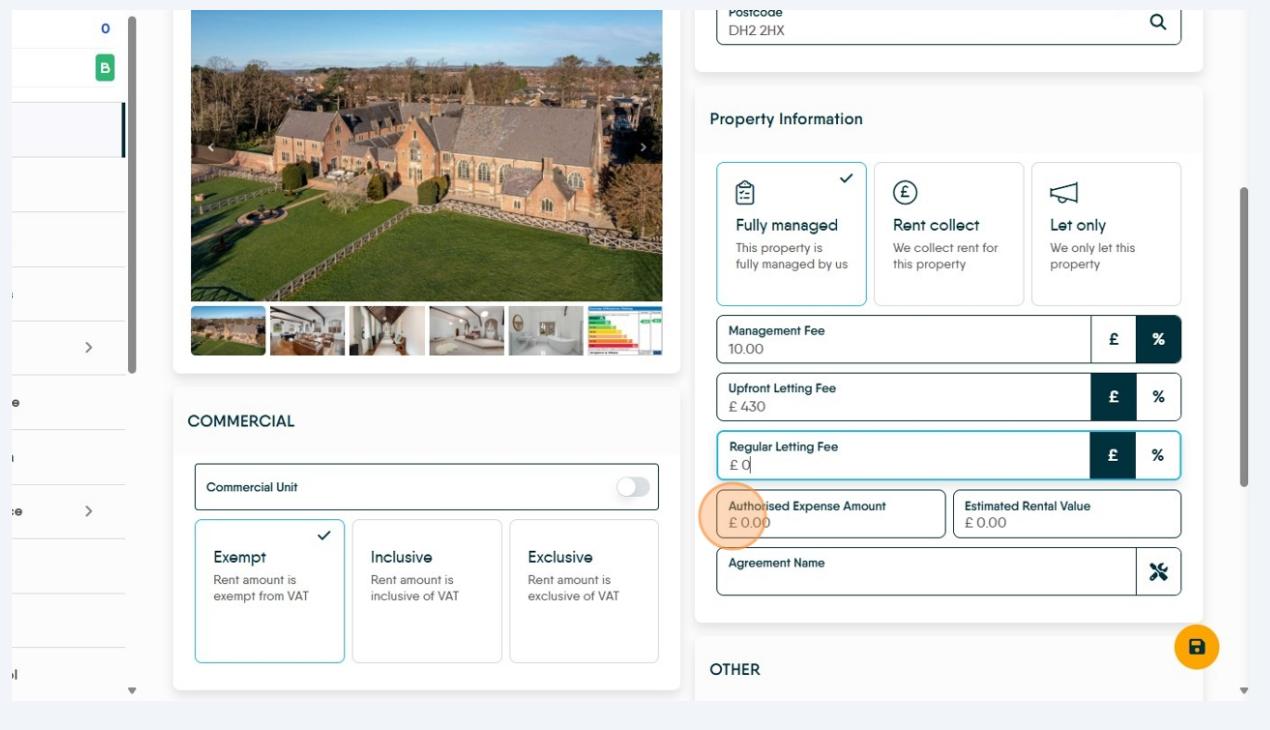
Click the "Enter amount" field and add the Regular Letting fee in £ or percentage of rent. This is charged monthly in addition to the rent.



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	£ <input type="checkbox"/> % <input type="checkbox"/>	
Upfront Letting Fee £ 430	£ <input type="checkbox"/> % <input type="checkbox"/>	
Regular Letting Fee £ 0	£ <input type="checkbox"/> % <input type="checkbox"/>	
Authorised Expense Amount £ 0.00	Estimated Rental Value £ 0.00	
Agreement Name <input type="text"/> 		

12 If required Click the "Authorised Expense Amount" field.



Postcode: DH2 2HX

Property Information

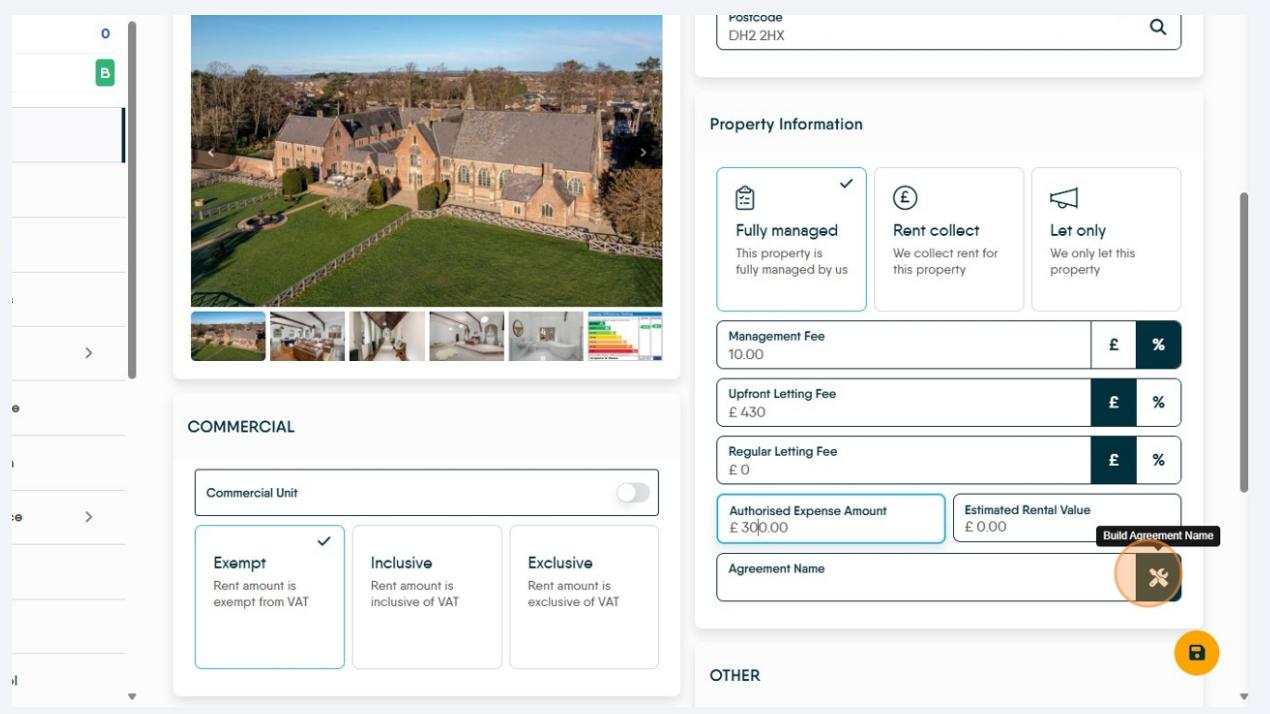
- Fully managed**: This property is fully managed by us
- Rent collect**: We collect rent for this property
- Let only**: We only let this property

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

Agreement Name:

OTHER

13 Click here to create the 'Agreement Name', this can be edited as required.



Postcode: DH2 2HX

Property Information

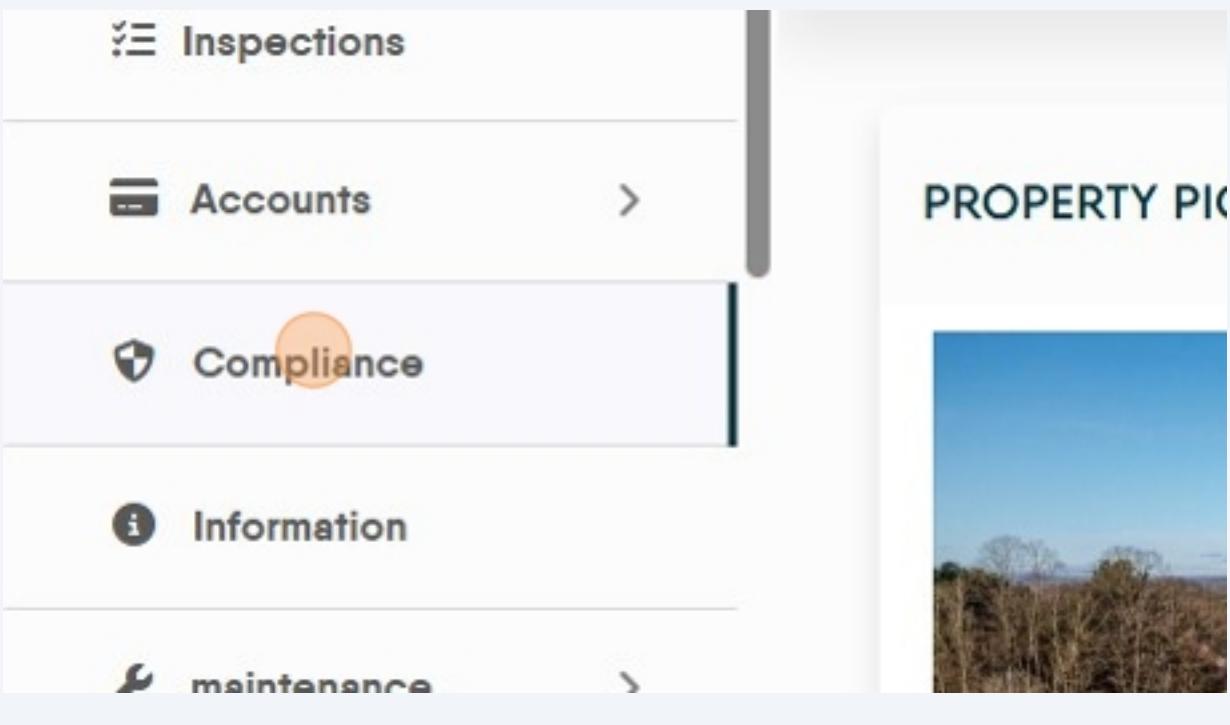
- Fully managed**: This property is fully managed by us
- Rent collect**: We collect rent for this property
- Let only**: We only let this property

Management Fee 10.00	£	%
Upfront Letting Fee £ 430	£	%
Regular Letting Fee £ 0	£	%
Authorised Expense Amount £ 30.00	£	%
Estimated Rental Value £ 0.00		

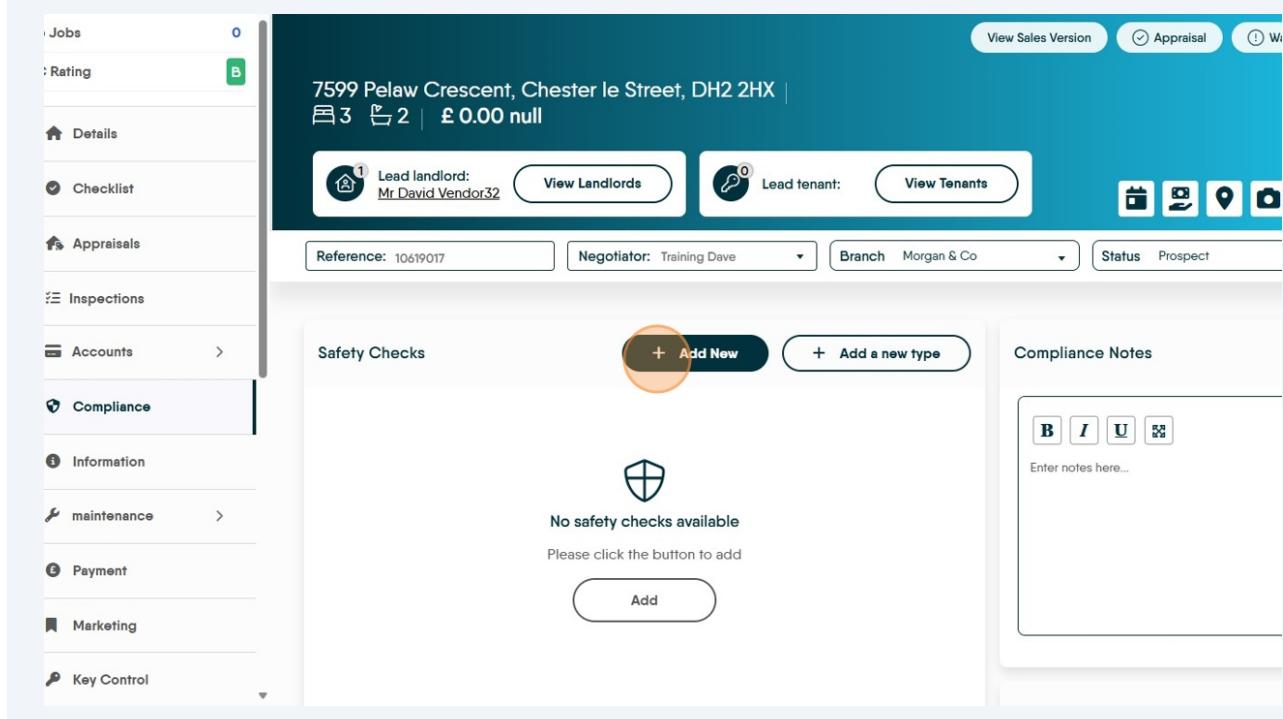
Agreement Name: **Build Agreement Name**

OTHER

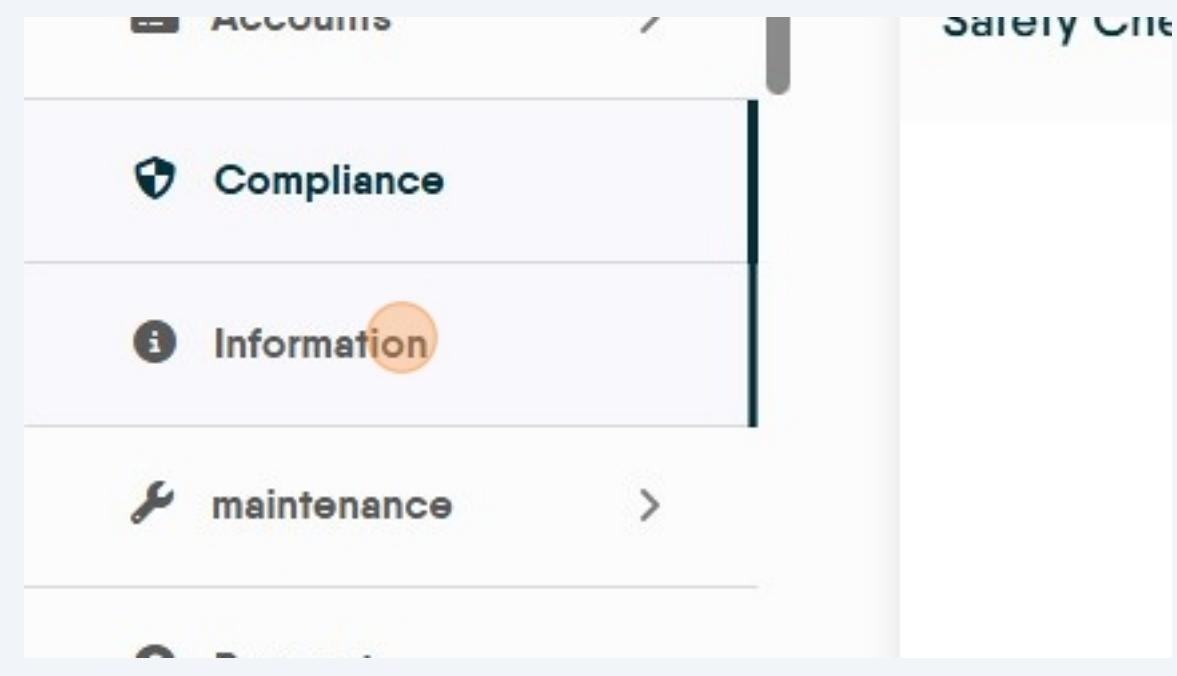
14 Click "Compliance"



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



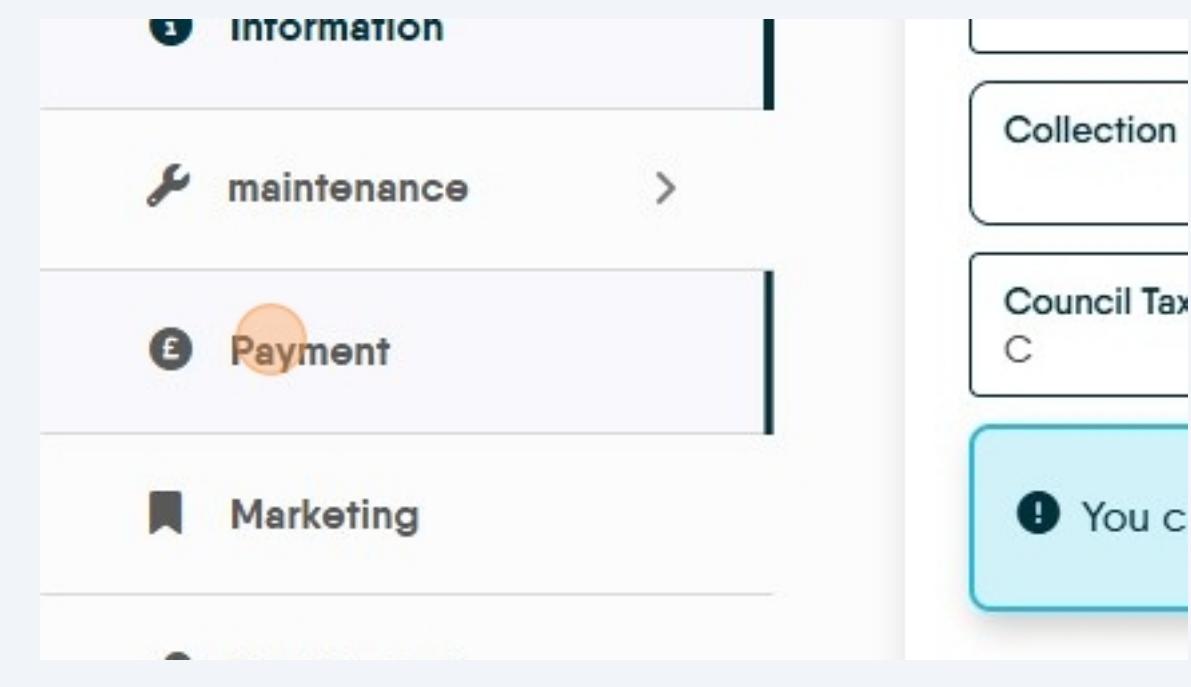
16 Click "Information"



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.

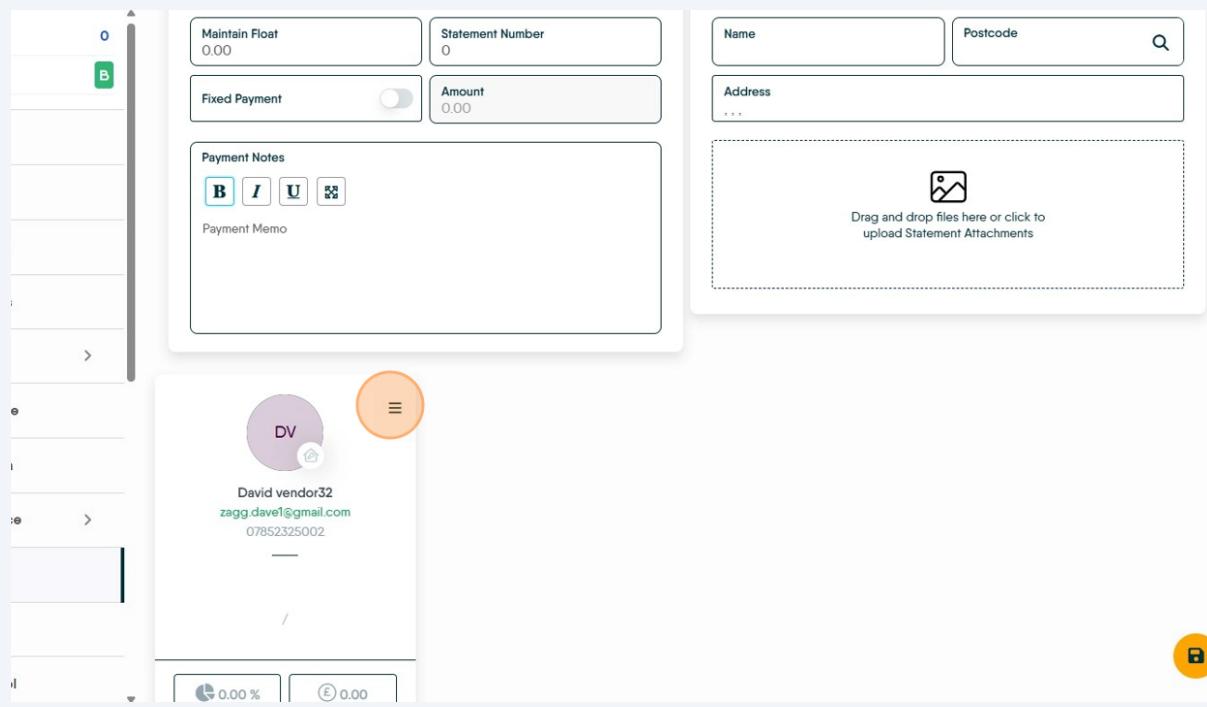
A screenshot of a software interface titled 'Property Information'. The 'Information' tab is highlighted with an orange circle. The interface includes sections for 'Meters' (Electric, Gas, Water, Oil meters) and 'Mortgage' (Provider, Term, Total Value, Deposit, Interest Rate, End Date). A note at the bottom left says: 'You can check the property Council Tax Band at [this link](#)'. A 'Notes' button is also visible.

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.



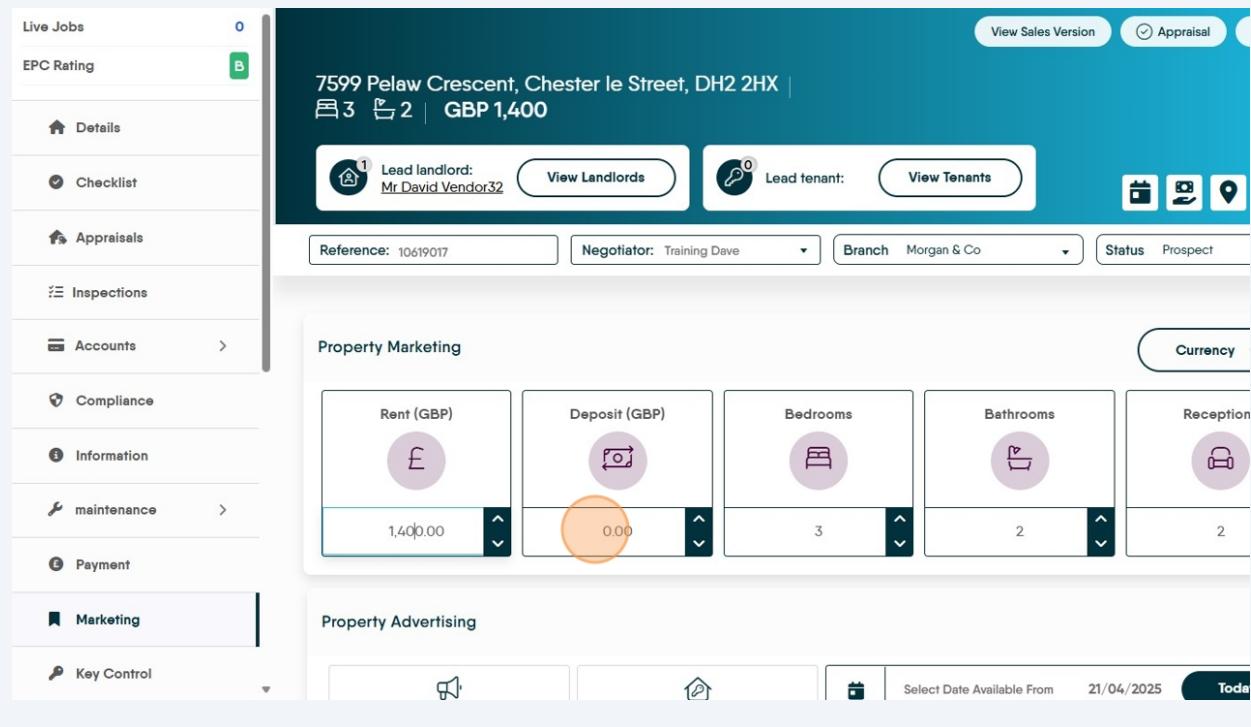
20 Click "Marketing"

The screenshot shows a software interface with a sidebar on the left and a main content area on the right. The sidebar contains several tabs: 'Information' (selected), 'maintenance', 'Payment', 'Marketing' (which is highlighted with an orange circle), and 'Key Control'. The main content area on the right displays a profile for 'David vendor32' with the email 'zagg.dave1@gmail.com' and phone number '07852325002'. Below this, there are two boxes: one showing '0.00 %' and another showing '0.0' with a pound sign. The top right corner of the main content area has a circular icon with a house and a key.

21 **Property Marketing** Click here to set the rental amount

The screenshot shows a software interface with a sidebar on the left and a main content area on the right. The sidebar contains several tabs: 'Live Jobs' (0), 'EPC Rating' (B), 'Details' (selected), 'Checklist', 'Appraisals', 'Inspections', 'Accounts' (with a dropdown arrow), 'Compliance', 'Information', 'maintenance' (with a dropdown arrow), 'Payment' (with a dropdown arrow), 'Marketing' (selected and highlighted with an orange circle), and 'Key Control' (with a dropdown arrow). The main content area on the right shows a property listing for '7599 Pelaw Crescent, Chester le Street, DH2 2HX' with '3' bedrooms and '2' bathrooms. It includes sections for 'Lead landlord: Mr David Vendor32' and 'Lead tenant:'. Below this is the 'Property Marketing' section, which includes fields for 'Rent (GBP)' (set to '0.00'), 'Deposit (GBP)' (set to '0.00'), 'Bedrooms' (set to '3'), 'Bathrooms' (set to '2'), and 'Reception' (set to '2'). The 'Property Advertising' section at the bottom includes icons for a speaker, a house, and a calendar, along with a 'Select Date Available From' field set to '21/04/2025' and a 'Today' button. The top right of the main content area has buttons for 'View Sales Version' and 'Appraisal'.

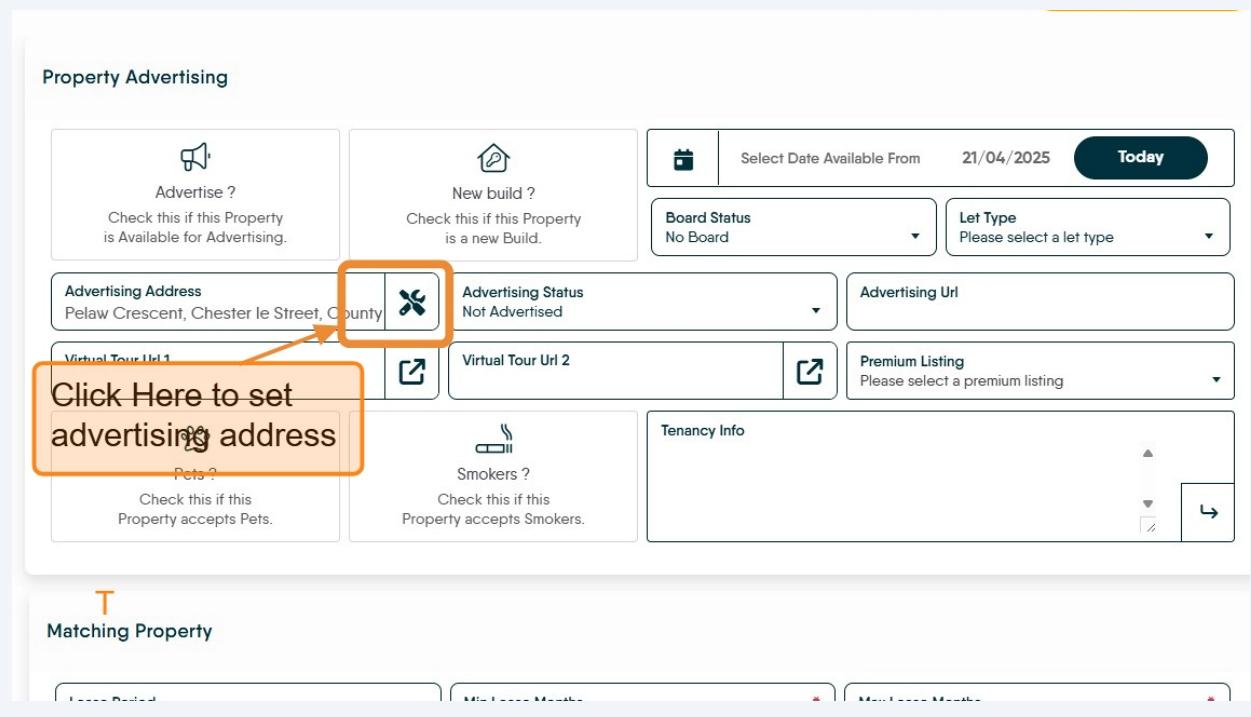
22 Click here to set the deposit.



The screenshot shows the 'Property Marketing' section of the software. It includes fields for Rent (GBP) set to 1,400.00, Deposit (GBP) set to 0.00 (which is highlighted with an orange circle), Bedrooms set to 3, Bathrooms set to 2, and Reception. Below this is the 'Property Advertising' section, which includes fields for Advertising Address (Pelaw Crescent, Chester le Street, County), Advertising Status (Not Advertised), Advertising Url, Virtual Tour Url 1, Virtual Tour Url 2, Premium Listing, and Smokers?.

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. It includes fields for Advertising Address (Pelaw Crescent, Chester le Street, County), Advertising Status (Not Advertised), Advertising Url, Virtual Tour Url 1, Virtual Tour Url 2, Premium Listing, Smokers?, and Pets?. Below this is the 'Matching Property' section.

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.

Matching Property

Lease Period
Monthly

Min Lease Months
6

Max Lease Months
12

Property Type
Semi-Detached House

Property Type Zoopla
Semi-Detached

Property Attributes

Pets Allowed

Furnished

Part Furnished

Unfurnished

Property Age

Period

Pre-war

Post-war

Modern

New-build

Property Style

30's Semi

Addison Homes

Georgian

Victorian

Tudor

Other Criteria

Potential Vendor

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 software interface for managing property descriptions and key features. On the left, there is a vertical sidebar with a list of items, some with green checkmarks. The main area is divided into two sections: 'Descriptions' and 'Key Features Added'.

Descriptions Section:

- Header: 'Descriptions' with a character limit of 'Characters: 1/20,000'.
- Buttons: Main, Summary, Extra 1, Extra 2, Advertising, Sms, Message.
- Text Area: 'Enter Property Main Description' with rich text tools (B, I, U,).
- Image: A large orange circular placeholder image.

Key Features Added Section:

- Header: 'Key Features Added - (max 10 for portals / feeds)' with a character limit of 'Characters: 0'.
- Text Area: 'Click here and start typing the Key Features...' with a search icon.
- List: A list of key features:
 - 1 Kitchen
 - TD Training Dave 28 January
- Image: A small orange circular placeholder image.