

Creating a Sales Version of a Lettings Property

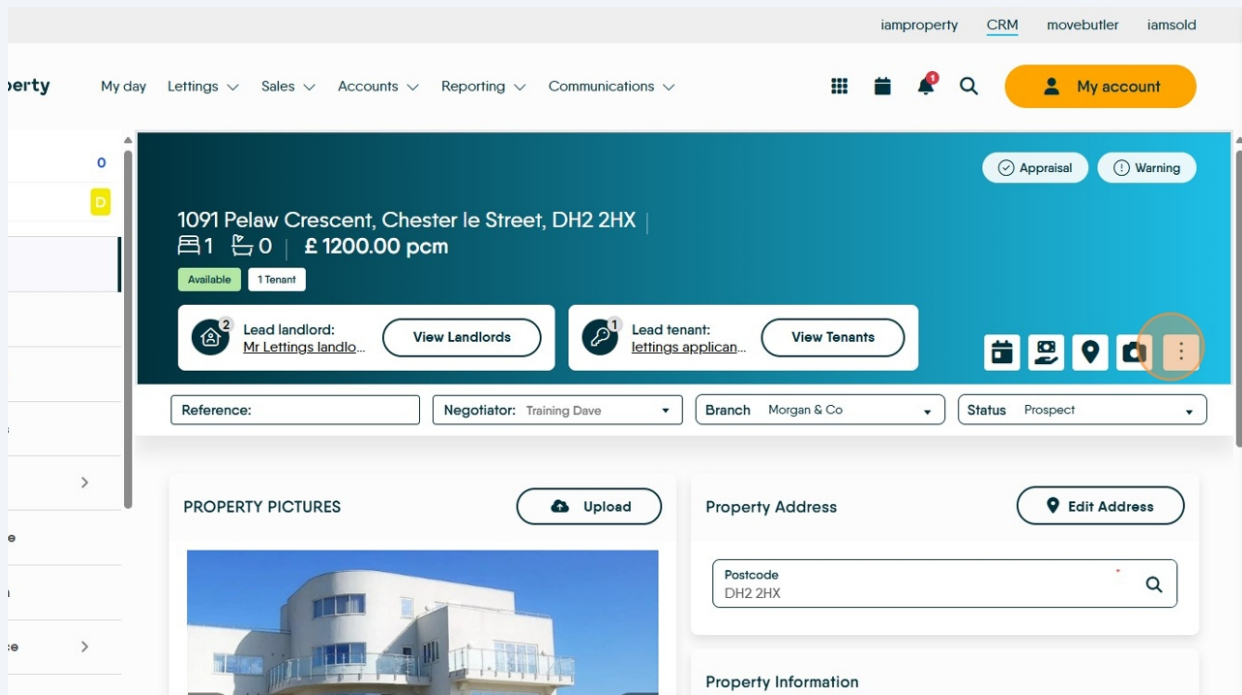


This guide offers a straightforward process for transforming a lettings property into a sales version, ensuring that all relevant information is seamlessly updated. It highlights how to maintain access to previous records while making necessary adjustments like pricing and compliance information.

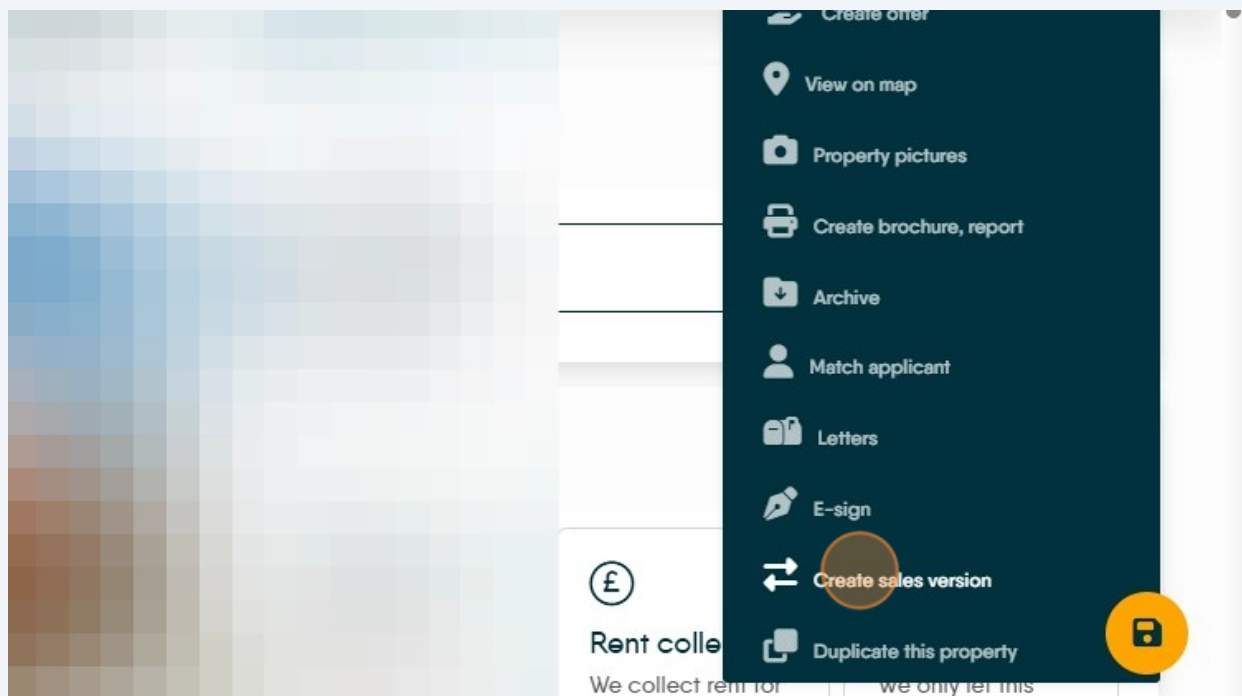
1 Navigate to the Lettings property you are looking to change to a Sales Property

The screenshot shows the iam property CRM interface. The top navigation bar includes links for iamproperty, CRM, movebutler, and iamsold. The main header features the iam property logo, a navigation menu (My day, Lettings, Sales, Accounts, Reporting, Communications), and a search bar. The left sidebar lists various modules: Live Jobs, EPC Rating, Details, Checklist, Appraisals, Inspections, Accounts, Compliance, Information, maintenance, Payment, Marketing, and Key Control. The main content area displays a property listing for 1091 Pelaw Crescent, Chester le Street, DH2 2HX. The listing includes a large image of the property, a status bar (Available, 1 Tenant), and buttons for View Landlords and View Tenants. Below the listing, there are sections for Property Pictures, Property Address, and Property Information. The Property Information section includes checkboxes for Fully managed, Rent collect, and Let only.

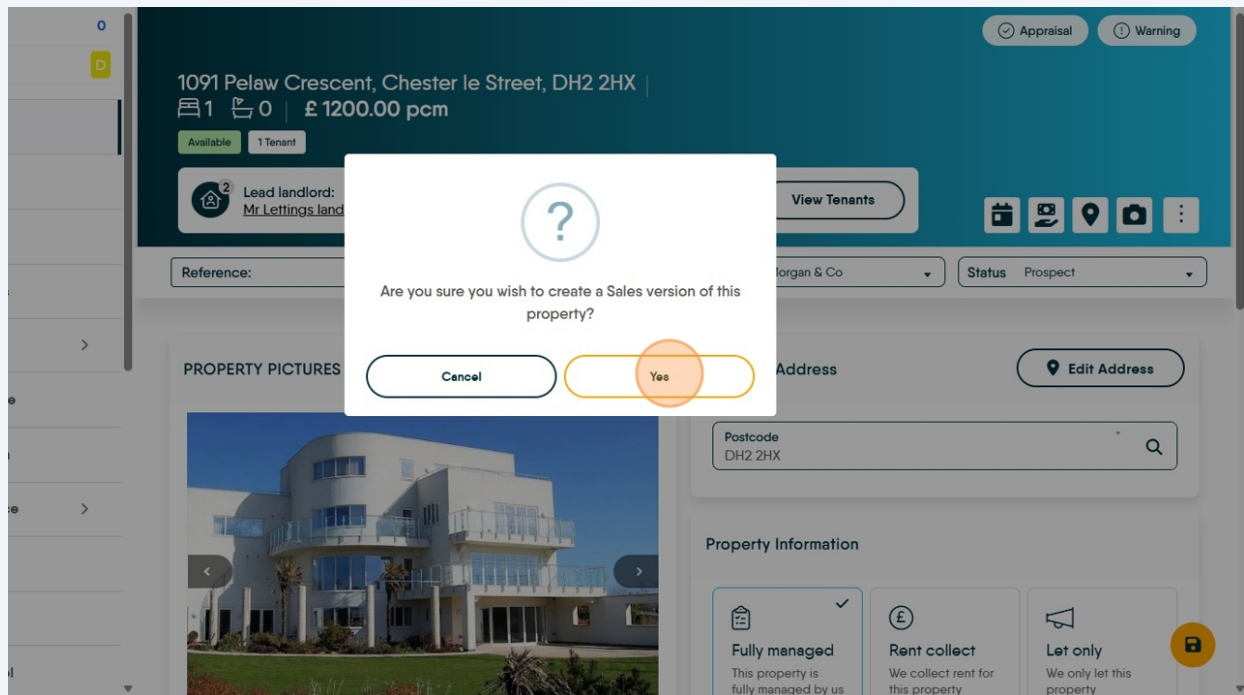
2 Click on the 3-dot menu



3 Click "Create Sales version"



4 Click "Yes" to confirm.



5

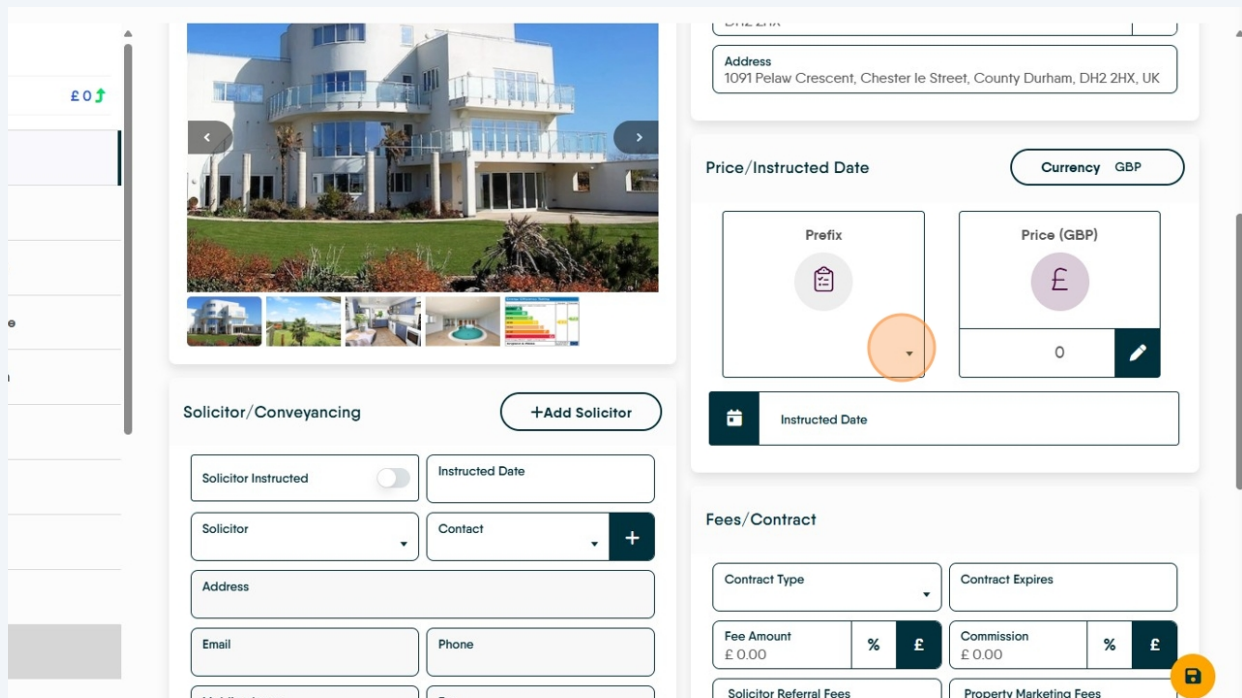
This will then create a Sales version of your property with the property information added as well as the Landlord record updated to be a Vendor record.

The Landlord and the Lettings Record for the property still exists in the CRM and neither are archived or deleted.

You will also see a button at the top of the screen 'View Lettings Version' (highlighted) clicking this will take you to the Lettings version of this property, there is a 'View Sales...' option on the Lettings property.

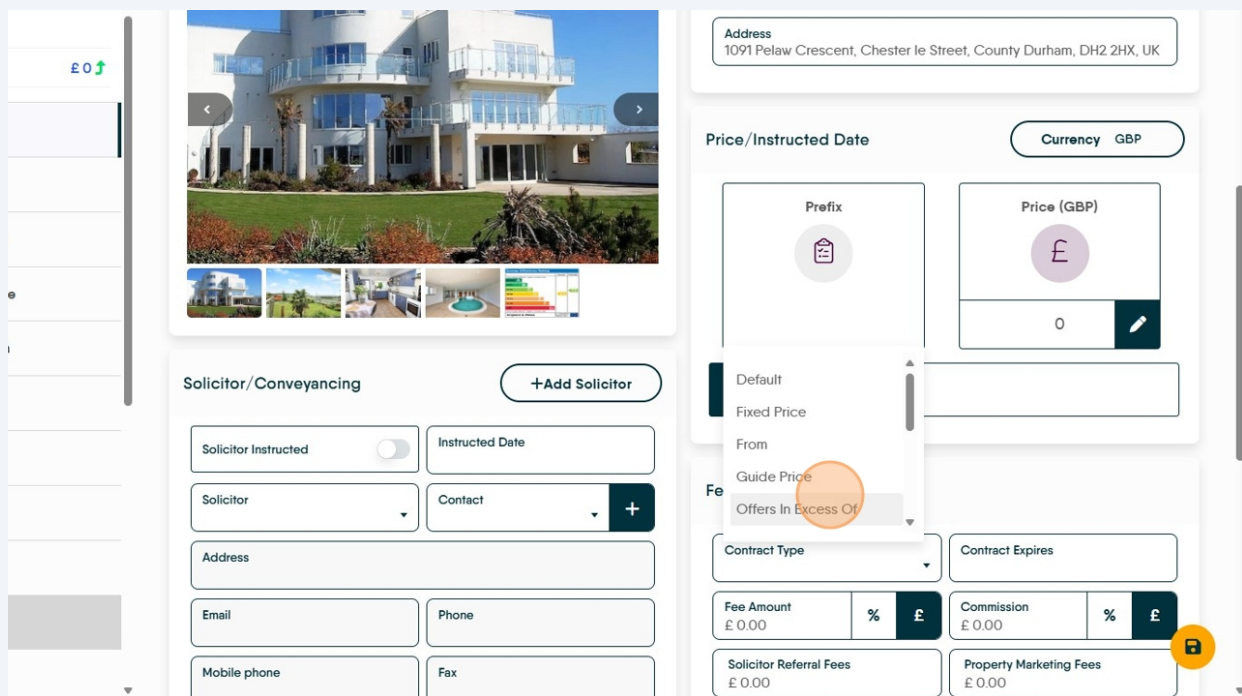
The screenshot shows the 'am property' CRM interface. At the top, there's a navigation bar with 'My day', 'Lettings', 'Sales', 'Accounts', 'Reporting', and 'Communications'. A 'My account' button is on the right. The main header area displays the property address '1091 Pelaw Crescent, Chester le Street, DH2 2HX' and a 'View Lettings Version' button (highlighted with an orange box). Below this, there's a 'Lead vendor' section with 'Mr Lettings landlord99' and a 'View Vendors' button. The main content area is divided into three sections: 'PROPERTY PICTURES' with an 'Upload' button, 'Property Address' with fields for 'Postcode' (DH2 2HX) and 'Address' (1091 Pelaw Crescent, Chester le Street, County Durham, DH2 2HX, UK), and 'Price/Instructed Date' with a 'Currency' dropdown set to 'GBP'.

6 Click here to update the property price prefix and price.



The screenshot shows a property listing form. On the left is a sidebar with a currency selector set to £ 0. The main area features a large photo of a modern house, a gallery of smaller images, and a 'Solicitor/Conveyancing' section with fields for 'Solicitor Instructed', 'Instructed Date', 'Solicitor', 'Contact', 'Address', 'Email', and 'Phone'. To the right, the 'Price/Instructed Date' section includes a 'Currency' dropdown set to 'GBP', a 'Prefix' field with a dropdown arrow highlighted by an orange circle, a 'Price (GBP)' field with a pound symbol and the number '0', and an 'Instructed Date' field. Below this is the 'Fees/Contract' section with fields for 'Contract Type', 'Contract Expires', 'Fee Amount', 'Commission', 'Solicitor Referral Fees', and 'Property Marketing Fees'.

7 Click in the Prefix field and select the option you are using.



This screenshot shows the same form as before, but the 'Prefix' dropdown menu is now open. The menu lists several options: 'Default', 'Fixed Price', 'From', 'Guide Price', and 'Offers In Excess Of'. An orange circle highlights the 'Offers In Excess Of' option. The rest of the form, including the property images, solicitor details, and fee sections, remains the same.

8 Click here and update the property price

The screenshot shows a property management interface. On the left, there's a sidebar with a currency selector set to £0. The main area displays a property listing for a modern white house with a balcony. Below the main image are several smaller thumbnail images. To the right of the images is a form with the following sections:

- Address:** 1091 Pelaw Crescent, Chester le Street, County Durham, DH2 2HX, UK
- Price/Instructed Date:** Includes a "Prefix" dropdown, a "Price (GBP)" field with a currency selector (GBP) and a value of 0, and an "Instructed Date" field.
- Solicitor/Conveyancing:** Includes a "+Add Solicitor" button, a "Solicitor Instructed" toggle, and fields for "Instructed Date", "Solicitor", "Contact", "Address", "Email", and "Phone".
- Fees/Contract:** Includes a "Contract Type" dropdown, a "Contract Expires" field, and a table for fees:

Fee Amount	%	£	Commission	%	£
£ 0.00			£ 0.00		

At the bottom right of the form, there are buttons for "Solicitor Referral Fee" and "Property Marketing Fee".

9 Click the "Enter price" field and add any notes if required.

The screenshot shows a modal form titled "Edit Property Price" with a close button (X) in the top right corner. The form has the following fields:

- Price:** A field with a currency selector (£) and a placeholder "Enter price". An orange circle highlights this field.
- Notes:** A text area with the placeholder "Type notes here.....".
- Buttons:** "Cancel" and "Save New Price" (highlighted in orange) at the bottom.

10 Click "Save New Price"

The screenshot shows a modal window titled "Edit Property Price" with a close button (X) in the top right corner. Below the title, there is a text input field for "Price" containing the value "£ 2,100,000". Below this is a larger text area labeled "Type notes here.....". At the bottom of the modal, there are two buttons: "Cancel" and "Save New Price". The "Save New Price" button is highlighted with an orange circle.

11 Click here and update the fees sections

The screenshot shows a property management dashboard. The top navigation bar includes links for "My day", "Lettings", "Sales", "Accounts", "Reporting", and "Communications", along with a "My account" button. The main content area is divided into several sections. On the left, there is a "Solicitor/Conveyancing" section with fields for "Solicitor Instructed", "Instructed Date", "Solicitor", "Contact", "Address", "Email", "Phone", "Mobile phone", and "Fax". On the right, there is a "Fees/Contract" section. This section includes a "Contract Type" dropdown, a "Contract Expires" field, and a table for fees. The table has columns for "Fee Amount", "%", and "£". The rows are "Fee Amount" (£ 0.00), "Commission" (£ 0.00), "Solicitor Referral Fees" (£ 0.00), and "Property Marketing Fees" (£ 0.00). An orange circle highlights the "Fees/Contract" section header. Below this, there is a "COMMERCIAL" section with a "Commercial Unit" field and a toggle switch.

12

Click "Compliance" to view the compliance that has been imported from the Lettings record

iam property My day Lettings Sales Accounts Reporting Communications

0 Viewings
0 Offers £0

Details
Checklist
Appraisals
Compliance
Information
Stats
Marketing
Media
Rooms
Portals

Solicitor/Conveyancing +Add Solicitor

Solicitor Instructed ☐ Instructed Date
Solicitor Contact +
Address
Email Phone
Mobile phone Fax

Offers In Excess Of 2,100,000
Instructed Date

Fees/Contract
Contract Type Contract Expires
Fee Amount £ 0.00 % £ Commission £ 0.00 %
Solicitor Referral Fees £ 0.00 Property Marketing Fees £ 0.00

COMMERCIAL
Commercial Unit

1091 Pelaw Crescent, Chester le Street, DH2 2HX |
Offers In Excess Of £ 2,100,000 | 3 | 1

Lead vendor: Mr Lettings landlord99 View Vendors

Reference Negotiator Training Dave Branch Morgan & Co Status

Energy Efficiency
Current D (55-68)
63
Potential

Environmental Impact (CO₂)
Current G (1-20)
0
Potential

+ Generate Preview

RRN Number
Expiry date

Energy Efficiency Rating
Very energy efficient - lower running costs
A B C D E F G
Not energy efficient - higher running costs
England & Wales EPC 2008-11-15

13

Click "View Vendors" to view the vendor records for the property. This will show all the records that have been brought over and allow quick access to those records.

Click the Vendor name to jump to the Vendor Records

iampropertyCRMmovebutle

My dayLettingsSalesAccountsReportingCommunications

0 Viewings0 Offers

DetailsChecklistAppraisalsComplianceInformationStatsMarketingMedia

1091 Pelaw Crescent, Chester le Street, DH2 2HX | Offers In Excess Of £ 2,100,000 | 3 | 1

Lead vendor: Mr Lettings landlord99View Vendors

ReferenceNegotiator Training DaveBranch Morgan & CoStatus

Energy Efficiency

Current
D
(55-68)

Environmental Impact (CO₂)

Current
G
(1-20)

+ Generate

RRN Number

Expiry date

Energy Efficiency Rating

Vendors

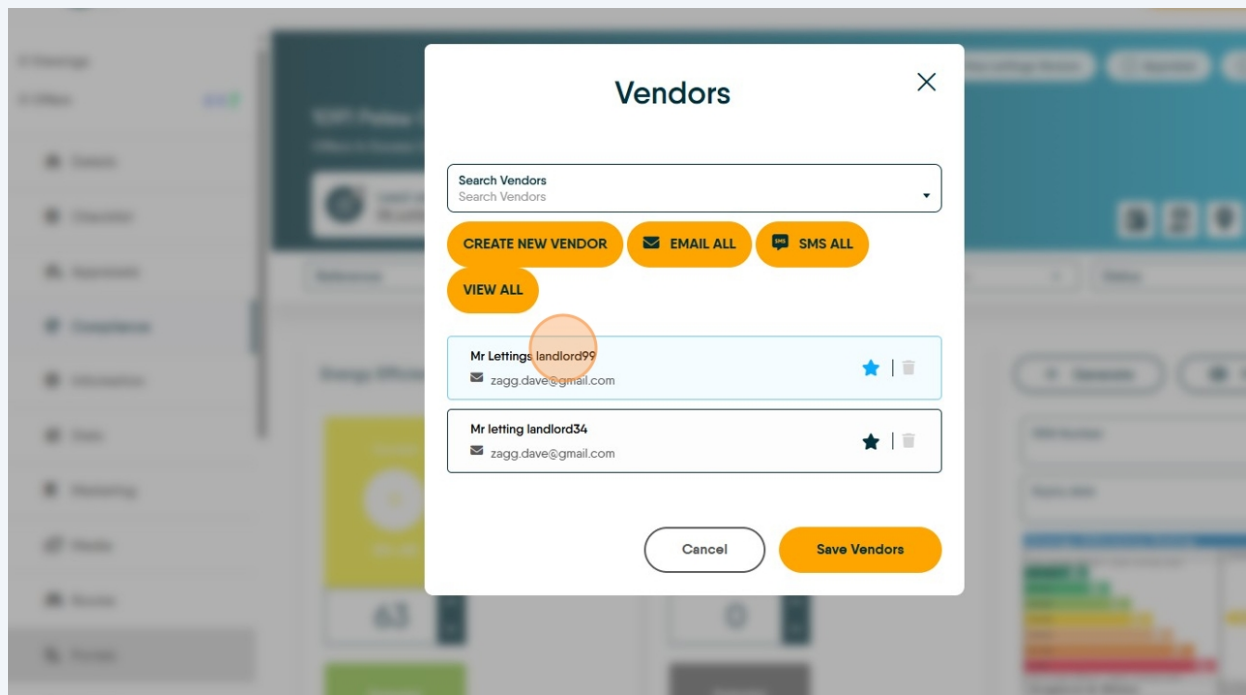
Search Vendors

CREATE NEW VENDOREMAIL ALLSMS ALLVIEW ALL

Mr Lettings landlord99
zagg.dave@gmail.com

Mr letting landlord34
zagg.dave@gmail.com

CancelSave Vendors



14 In the Landlord and Vendor records you will see 2 icons 'LL' and 'VE'

Click "LL" in the Vendor record to jump to the Landlord record and 'VE' to move to the Vendor record from the Landlord.