

# Creating a Sales Version of a Lettings Property

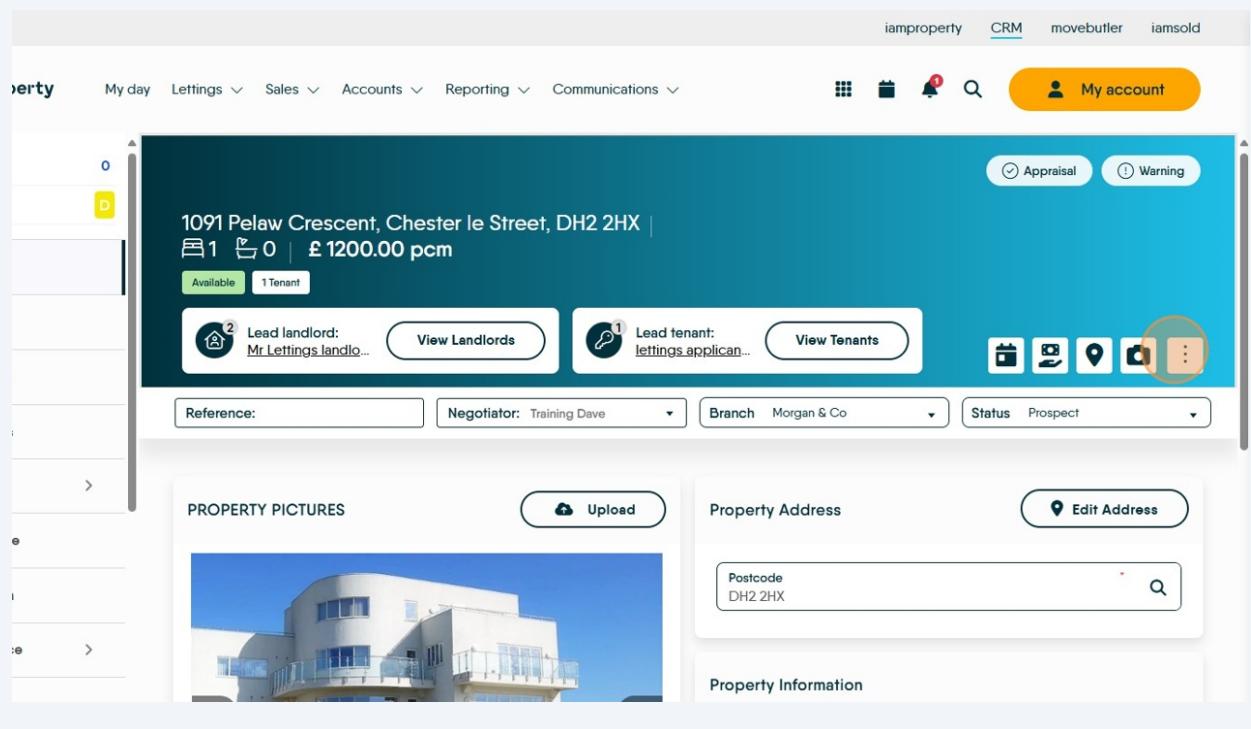


This guide offers a straightforward process for transforming a lettings property into a sales version, ensuring that all relevant information is seamlessly updated. It highlights how to maintain access to previous records while making necessary adjustments like pricing and compliance information.

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

The screenshot shows the iam property software interface. On the left, a sidebar lists various property management tasks: Live Jobs (0), EPC Rating (D), 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 shows '1 Bed | £1200.00 pcm'. Below the address, it says 'Available' and '1 Tenant'. It lists 'Lead landlord: Mr Lettings landlo...' and 'Lead tenant: lettings applican...'. The interface includes sections for 'PROPERTY PICTURES' (with a large image of a modern white building), 'Property Address' (with a 'Postcode' field containing 'DH2 2HX'), and 'Property Information' (with three status boxes: 'Fully managed' (checked), 'Rent collect', and 'Let only'). The top navigation bar includes links for 'My day', 'Lettings', 'Sales', 'Accounts', 'Reporting', 'Communications', 'CRM', 'movebutler', 'iamsold', and 'My account'.

2 Click on the 3-dot menu



1091 Pelaw Crescent, Chester le Street, DH2 2HX |  
1 bed 0 baths £1200.00 pcm

Available 1 Tenant

Lead landlord: Mr Lettings lando... View Landlords

Lead tenant: lettings applican... View Tenants

Appraisal Warning

Reference: Negotiator: Training Dave Branch: Morgan & Co Status: Prospect

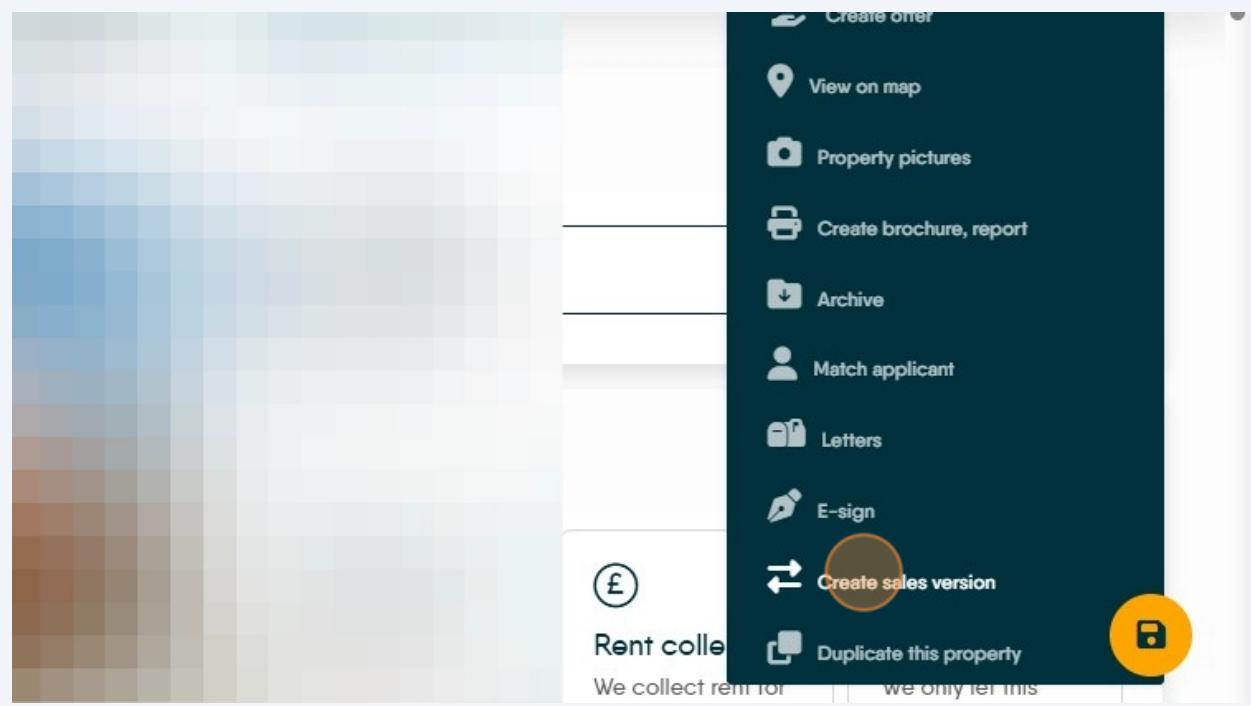
PROPERTY PICTURES Upload

Property Address Edit Address

Postcode: DH2 2HX

Property Information

3 Click "Create Sales version"



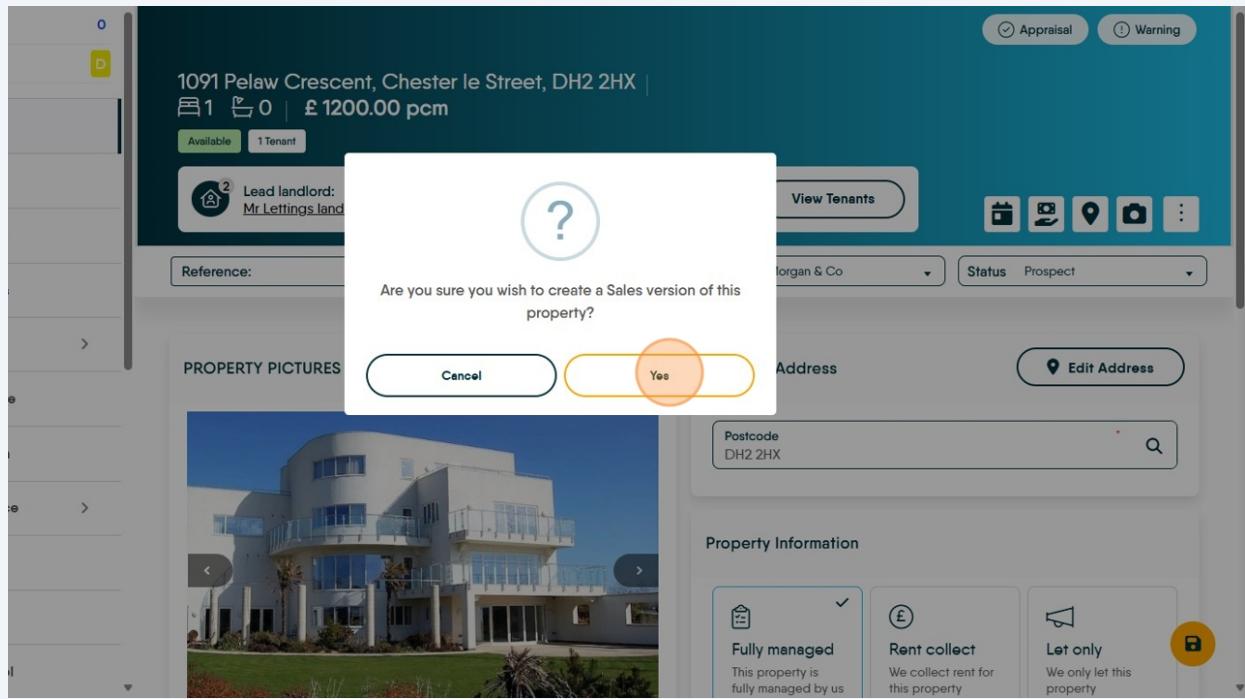
- Create offer
- View on map
- Property pictures
- Create brochure, report
- Archive
- Match applicant
- Letters
- E-sign
- Create sales version
- Duplicate this property

Rent collection

We collect rent for us | we only let this

4

Click "Yes" to confirm.

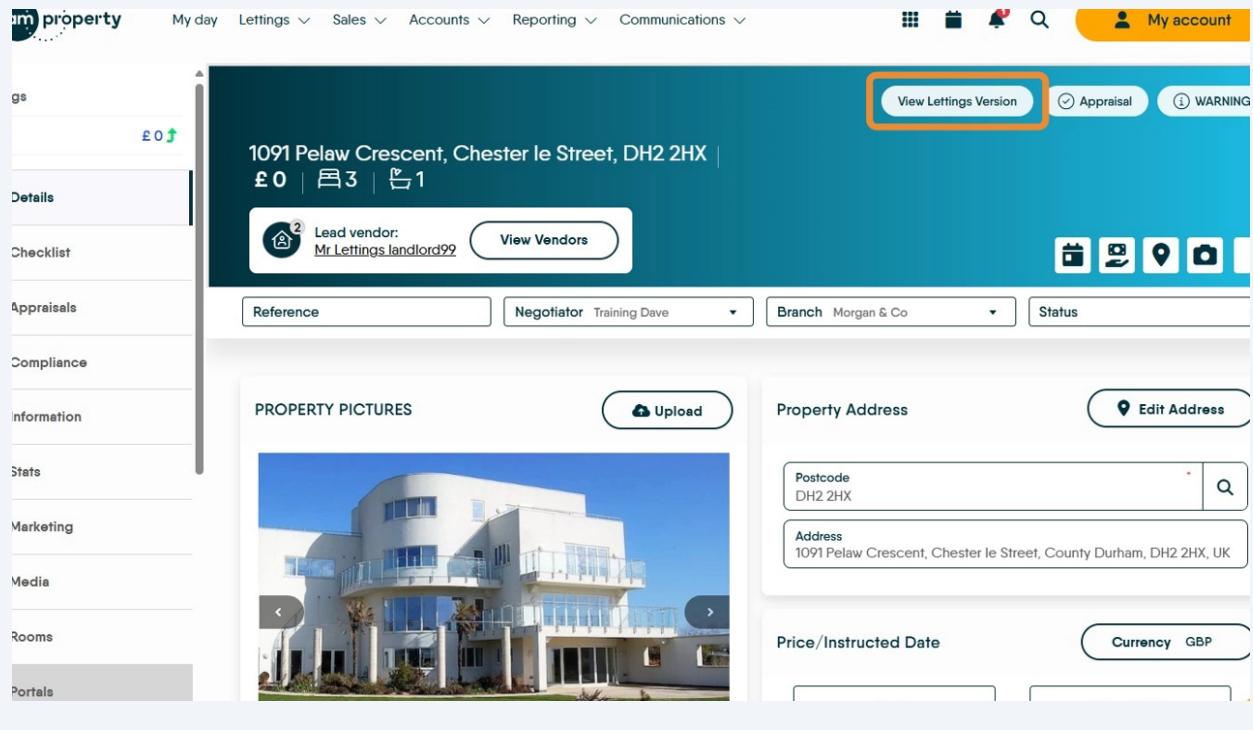


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This will then create a Sales version of your property with the property information added as well as the Landlord record updated to be a Vendor record.

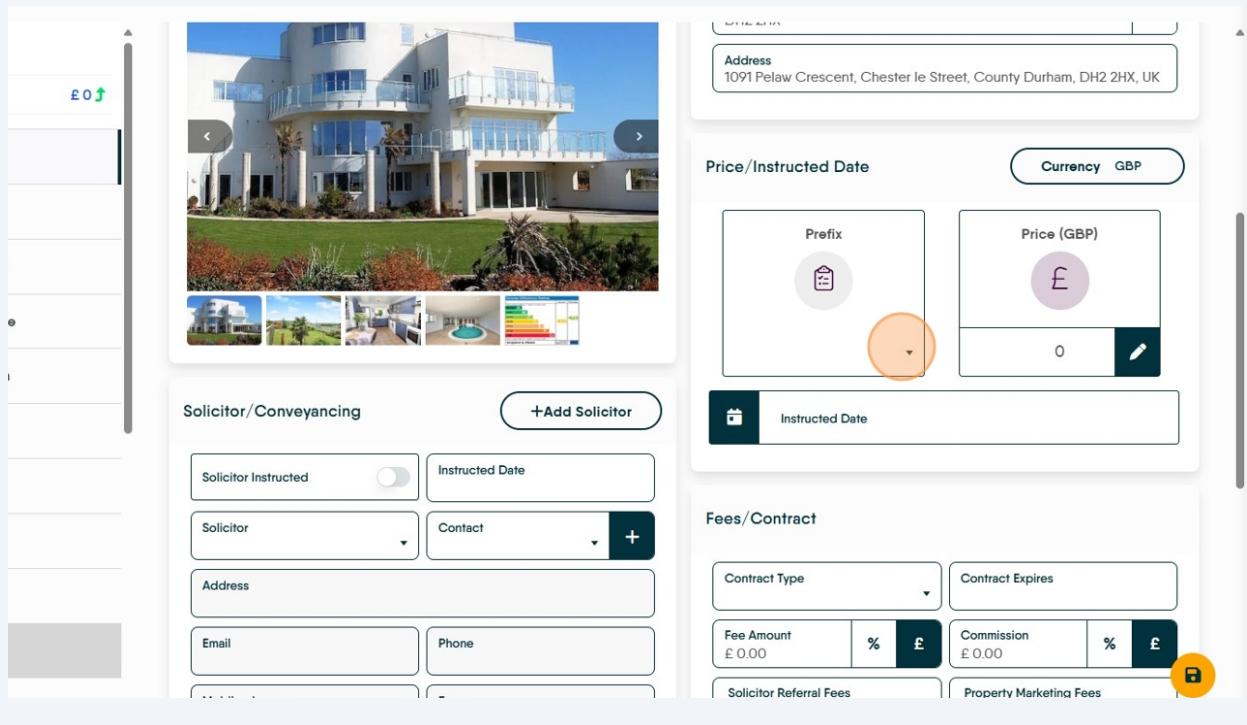
The Landlord and the Lettings Record for the property still exists in the CRM and neither are archived or deleted.

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.



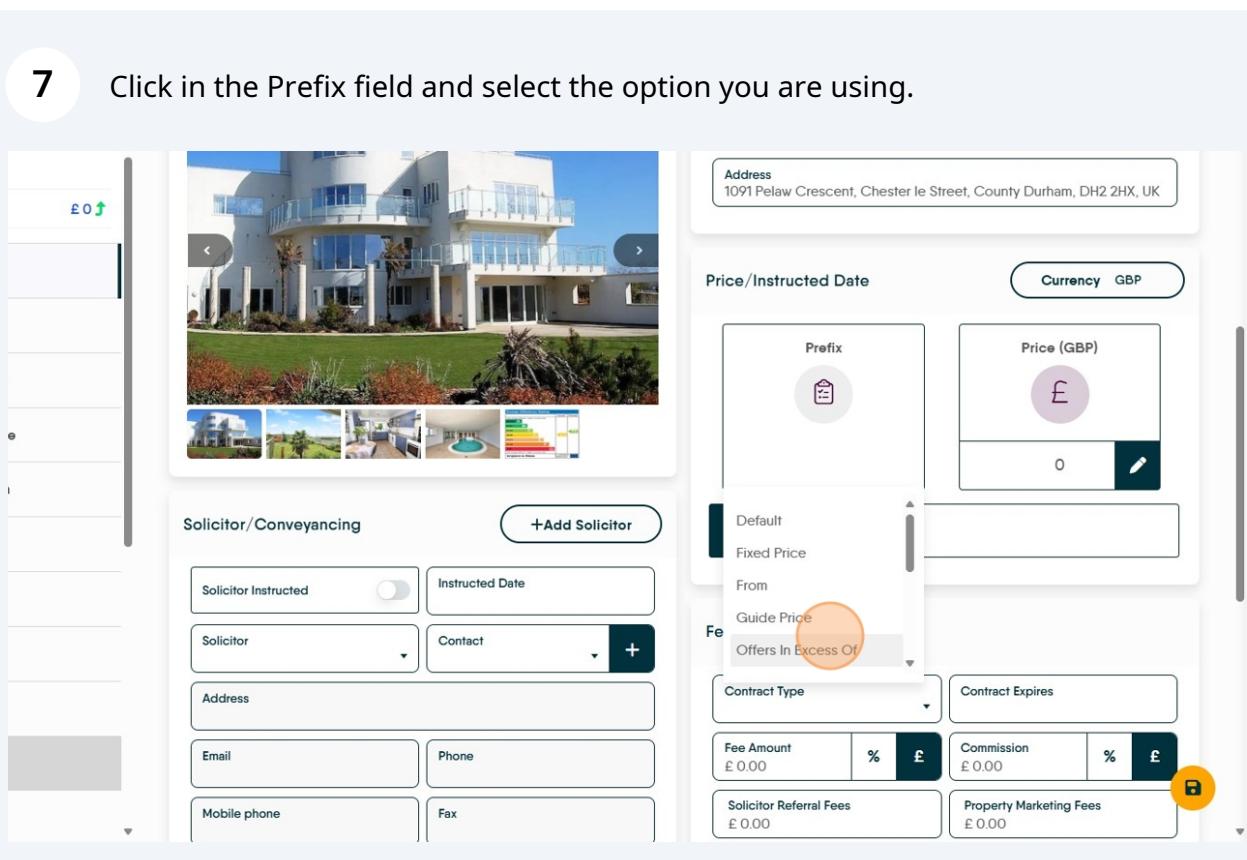
The screenshot shows the im property software interface. The top navigation bar includes 'My day', 'Lettings', 'Sales', 'Accounts', 'Reporting', 'Communications', and 'My account'. The main content area displays a property listing for '1091 Pelaw Crescent, Chester le Street, DH2 2HX' with a price of '£0'. A 'View Lettings Version' button is highlighted with a red box. Other buttons include 'Appraisal' and 'WARNING'. The sidebar on the left contains tabs for 'Details', 'Checklist', 'Appraisals', 'Compliance', 'Information', 'Stats', 'Marketing', 'Media', 'Rooms', and 'Portals'. The main content area also includes sections for 'PROPERTY PICTURES' (with an upload button), 'Property Address' (with fields for Postcode and Address), and 'Price/Instructed Date' (with a currency dropdown set to GBP).

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



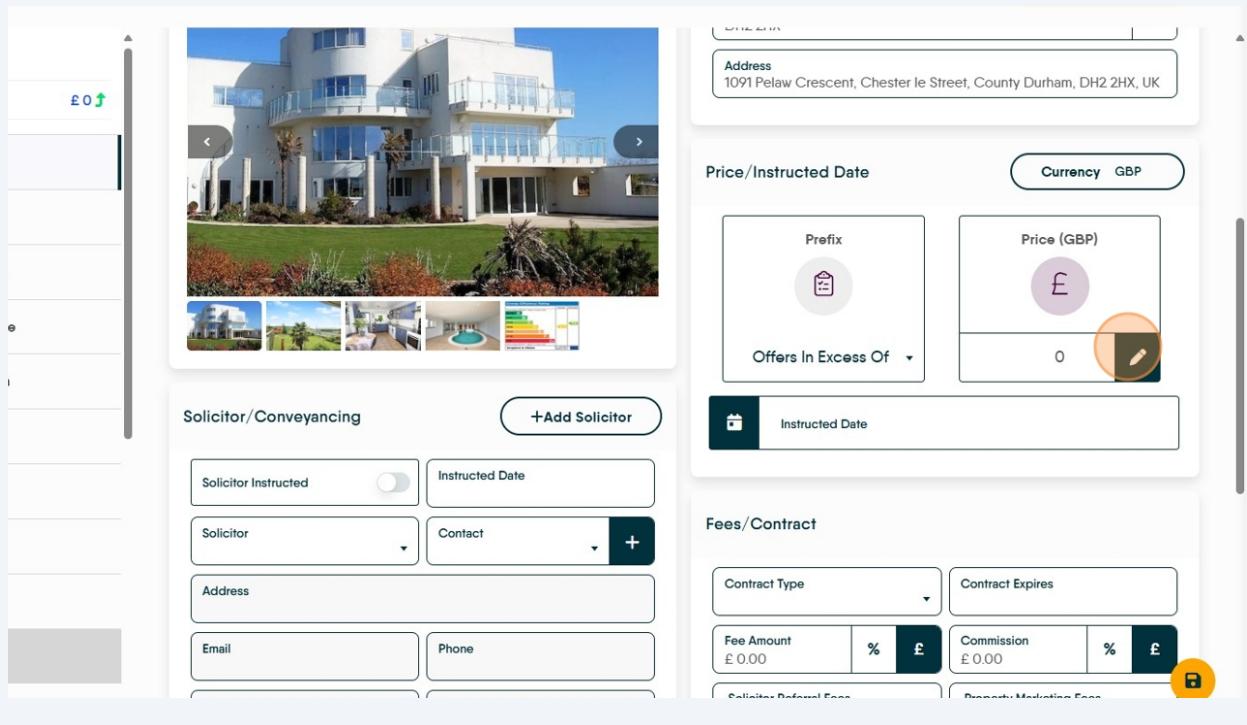
The screenshot shows a property listing interface. At the top, there is a large image of a modern, two-story house with a balcony. Below the image are several smaller thumbnail images of the property and a color-coded energy efficiency rating chart. To the right of the image, there is a 'Price/Instructed Date' section. This section includes a 'Prefix' field (with a clipboard icon) and a 'Price (GBP)' field (with a pound sign icon). The 'Price (GBP)' field has a value of '0' and a edit icon. Below these fields is an 'Instructed Date' section with a calendar icon. Further down, there is a 'Fees/Contract' section with fields for 'Contract Type', 'Contract Expires', 'Fee Amount' (set to £0.00), 'Commission' (set to £0.00), and 'Solicitor Referral Fees' (set to £0.00). A 'Property Marketing Fees' field is also present. On the left side of the interface, there is a sidebar with a '£ 0 ↑' button and a scroll bar.

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



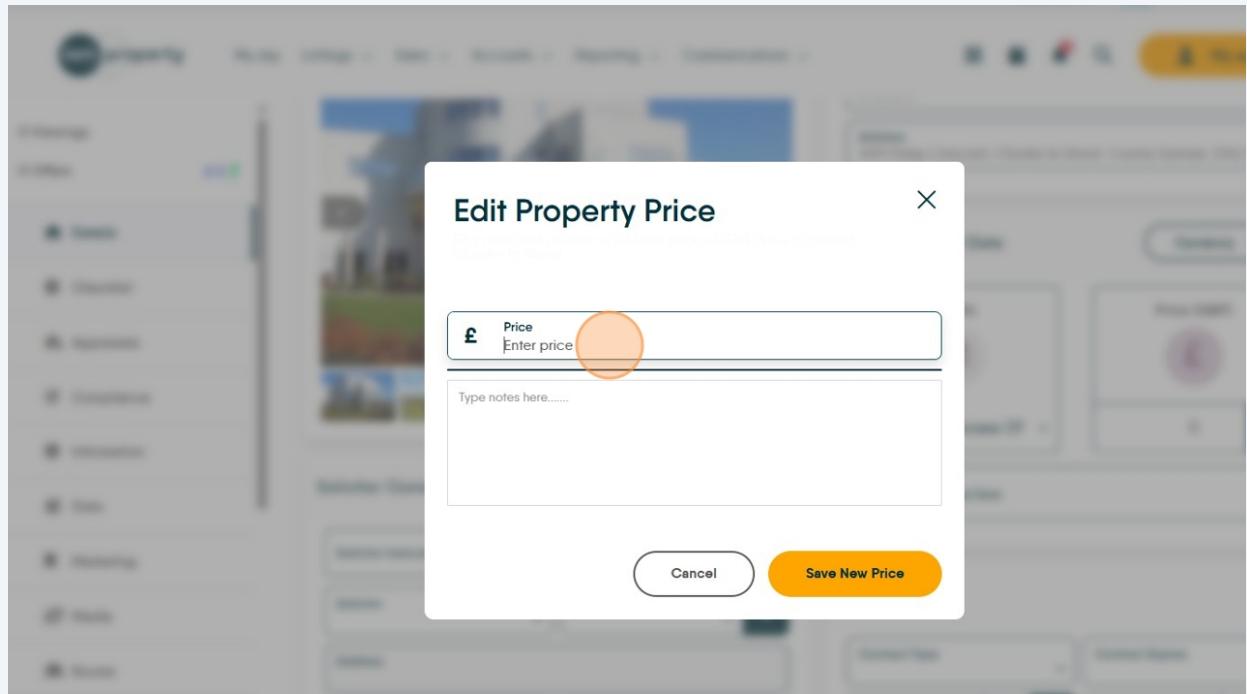
The screenshot shows the same property listing interface as the previous one, but with a focus on the 'Prefix' field. The 'Prefix' field is currently set to 'Default'. A dropdown menu is open, showing other options: 'Fixed Price', 'From', 'Guide Price', and 'Offers In Excess Of'. The 'Offers In Excess Of' option is highlighted with a yellow circle. The rest of the interface remains the same, including the large house image, smaller thumbnails, energy efficiency chart, and the 'Fees/Contract' section with its various fields. The sidebar on the left is also present.

8 Click here and update the property price



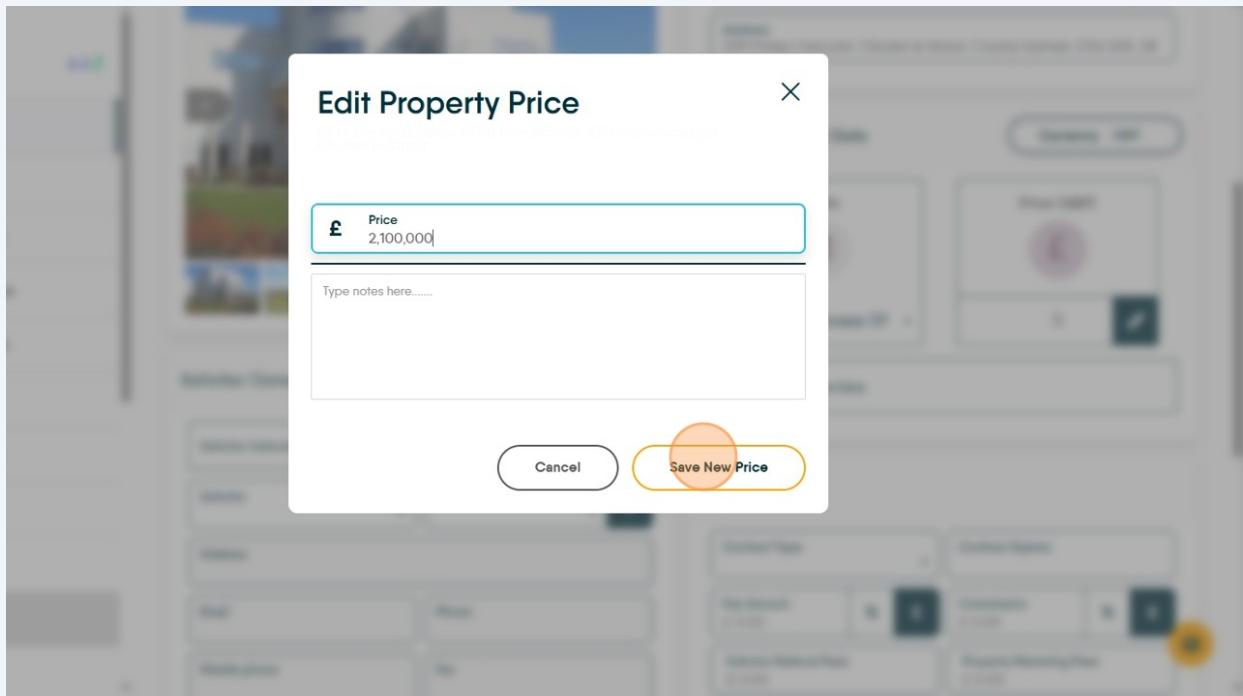
The screenshot shows a property listing page. At the top right, there is a 'Price/Instructed Date' section with a 'Prefix' dropdown (Offers In Excess Of) and a 'Price (GBP)' input field (0) with a currency icon and a pencil icon. Below this is an 'Instructed Date' field with a calendar icon. To the left, there is a 'Solicitor/Conveyancing' section with fields for 'Solicitor Instructed' (switch), 'Instructed Date', 'Solicitor' (dropdown), 'Contact' (dropdown), 'Address', 'Email', and 'Phone'. The page also features a large image of a modern, multi-story house with a balcony, and a row of smaller thumbnail images below it.

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

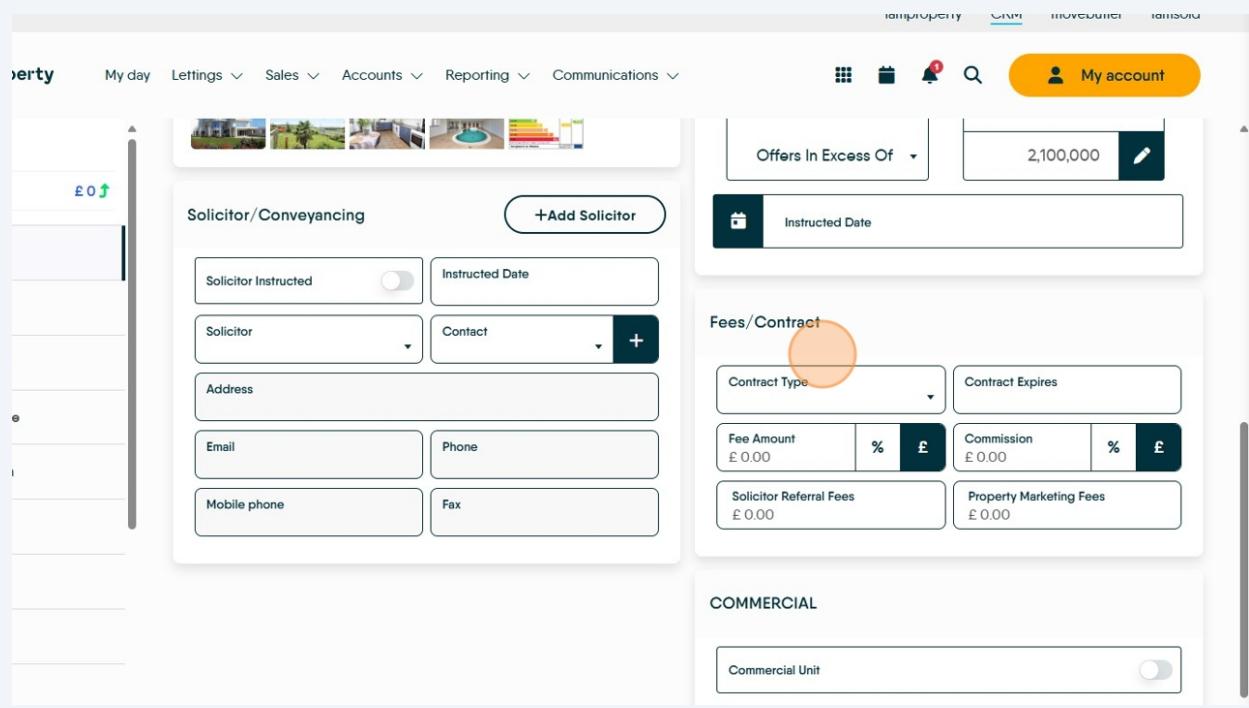


The screenshot shows a modal dialog titled 'Edit Property Price'. It contains a 'Price' input field with a pound sign icon and the placeholder 'Enter price', which is circled in orange. Below the input field is a text area for 'Type notes here.....'. At the bottom are 'Cancel' and 'Save New Price' buttons. The background of the modal is white, while the main application interface is blurred.

10 Click "Save New Price"



11 Click here and update the fees sections



12

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

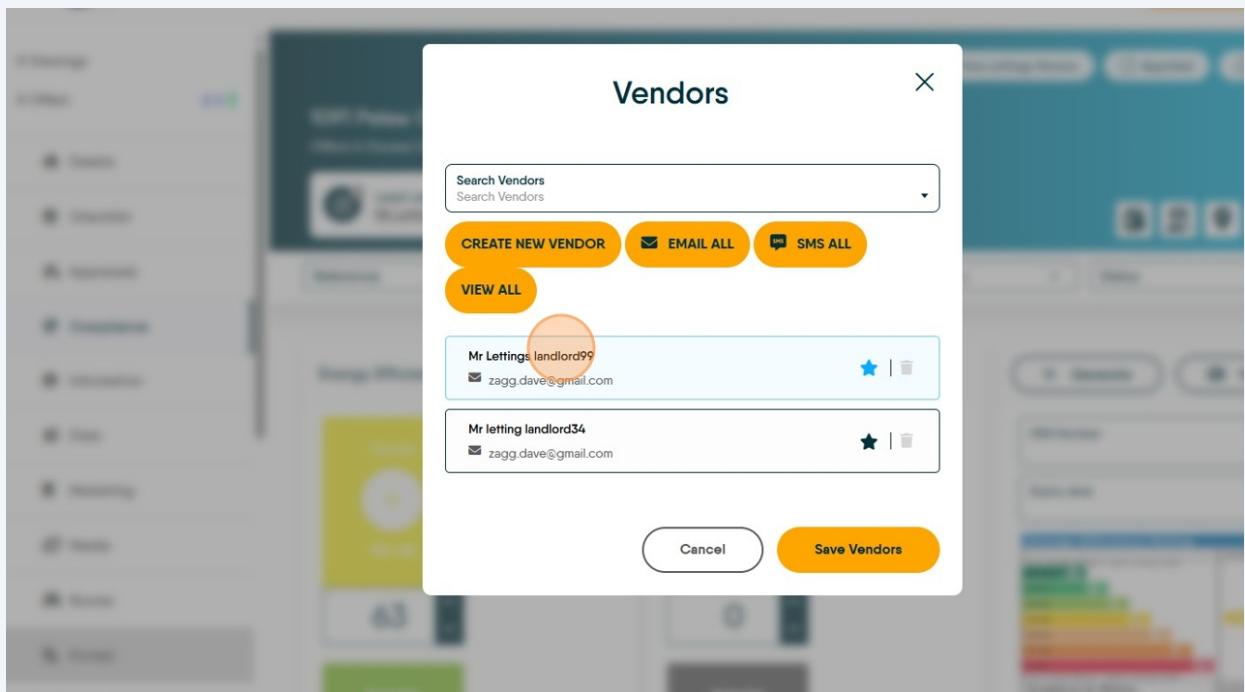
The screenshot shows the iAm property software interface. On the left, a vertical sidebar lists various sections: Details, Checklist, Appraisals, Compliance (which is highlighted with an orange circle), Information, Stats, Marketing, Media, Rooms, and Portals. The main content area is divided into several sections: 'Solicitor/Conveyancing' (with fields for 'Solicitor Instructed', 'Instructed Date', 'Solicitor', 'Contact', 'Address', 'Email', 'Phone', 'Mobile phone', and 'Fax'); 'Offers In Excess Of' (set to £2,100,000); 'Instructed Date' (calendar icon); 'Fees/Contract' (with fields for 'Contract Type', 'Contract Expires', 'Fee Amount', 'Commission', 'Solicitor Referral Fees', and 'Property Marketing Fees'); 'COMMERCIAL' (with a 'Commercial Unit' section); and a detailed property view for '1091 Pelaw Crescent, Chester le Street, DH2 2HX'. This view includes fields for 'Offers In Excess Of £2,100,000', 'Lead vendor: Mr\_Lettings.landlord99', 'View Vendors', 'Reference', 'Negotiator', 'Branch', 'Status', and 'Energy Efficiency' and 'Environmental Impact (CO<sub>2</sub>)' sections. The 'Energy Efficiency' section shows a current rating of 'D' (63) and a potential rating of '63'. The 'Environmental Impact (CO<sub>2</sub>)' section shows a current rating of 'G' (0) and a potential rating of '0'. A detailed energy efficiency rating table is also shown, with a current rating of '63' and a potential rating of '72'.

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

The screenshot shows the iamproperty software interface. The top navigation bar includes links for 'My day', 'Lettings', 'Sales', 'Accounts', 'Reporting', 'Communications', 'CRM', 'movebutton', and a 'My account' dropdown. The main content area displays a property listing for '1091 Pelaw Crescent, Chester le Street, DH2 2HX' with an offer of 'Offers In Excess Of £ 2,100,000'. The listing includes sections for 'Energy Efficiency' (Current Rating D, 55-68) and 'Environmental Impact (CO<sub>2</sub>)' (Current Rating G, 1-20). A 'View Vendors' button is highlighted with a yellow circle. The left sidebar contains links for 'Details', 'Checklist', 'Appraisals', 'Compliance', 'Information', 'Stats', 'Marketing', and 'Media'. A central modal window titled 'Vendors' is open, showing a search bar, 'CREATE NEW VENDOR' and 'VIEW ALL' buttons, and a list of two vendors: 'Mr Lettings landlord99' and 'Mr letting landlord34', both associated with the email 'zagg.dave@gmail.com'. The 'Save Vendors' button is also highlighted with a yellow circle.



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.