

Adding a New Sales Property Record and Creating a Vendor Record



This guide provides a straightforward process for adding a new sales property record in the iamproperty CRM system.

By following the steps, users can input property details and vendor information, and create a basic property and vendor records. Obviously, the more information added to a record the better, here we look at the basic data required.

It is essential for real estate professionals looking to streamline their operations and enhance productivity within the CRM platform.



Tip! This guide shows how to create a basic Property and Vendor record.

There are many more pieces of data that can be added to a record once the basic record is created than we are showing here. If you need information or training on these please refer to your Account Manager.

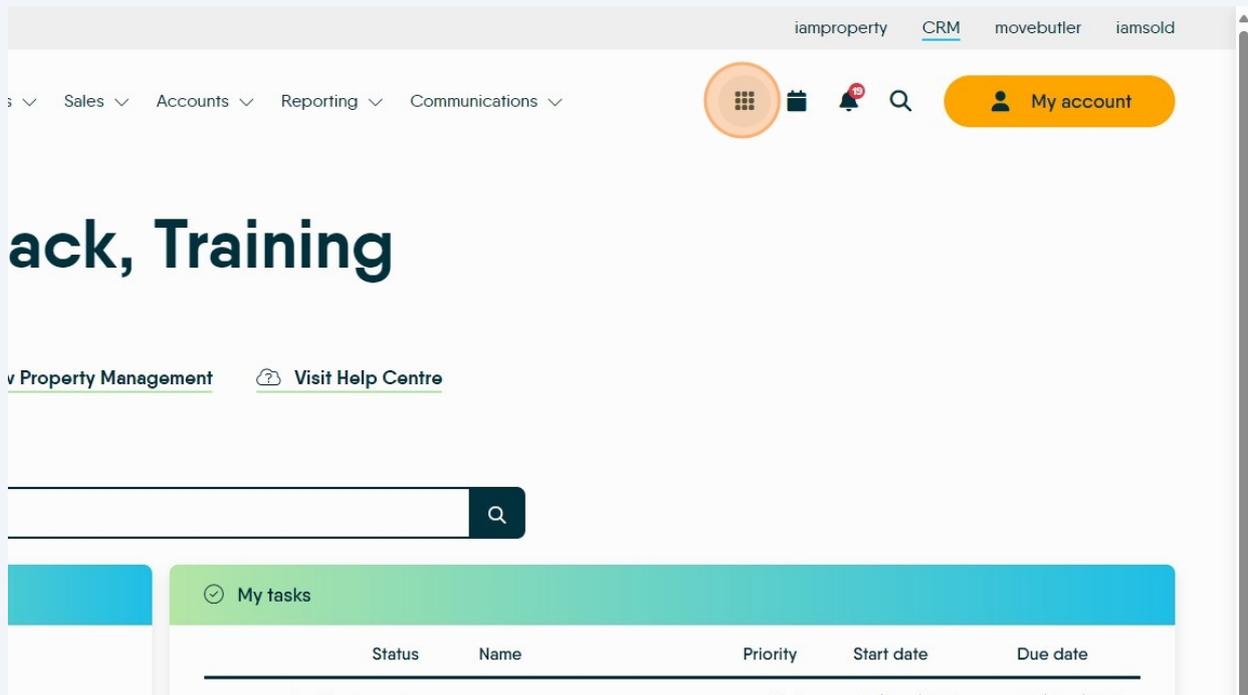
1

Navigate to <https://crm.iamproperty.com/MyDay>

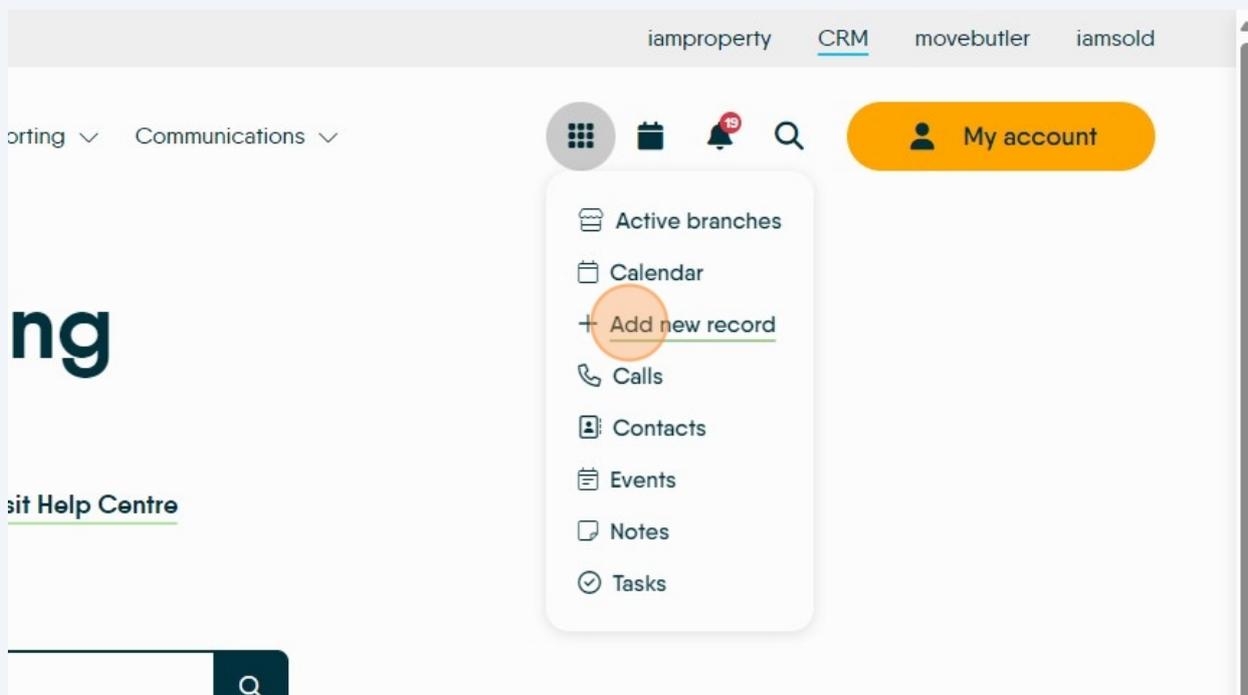


There are 2 places that a new record can be added to the CRM from the 'bento' icon at the top right of the screen or from the MyDay screen and the Add New Record option. The key difference is that the 'bento' icon is always available wherever you are in the CRM and you can opt to open the new screen as a separate tab so you dont lose where you are currently working. This is done by pressing the ctrl key as you click the record you are creating.

2 To create a new record from anywhere on the CRM click the 'bento' menu

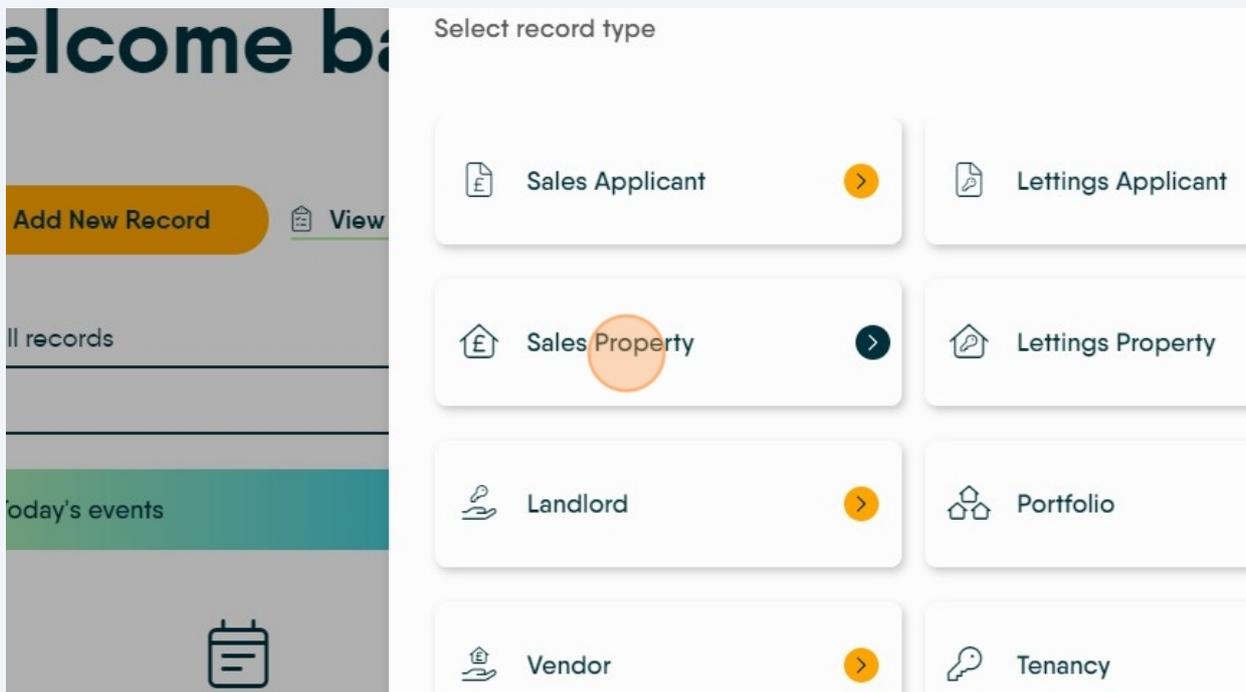
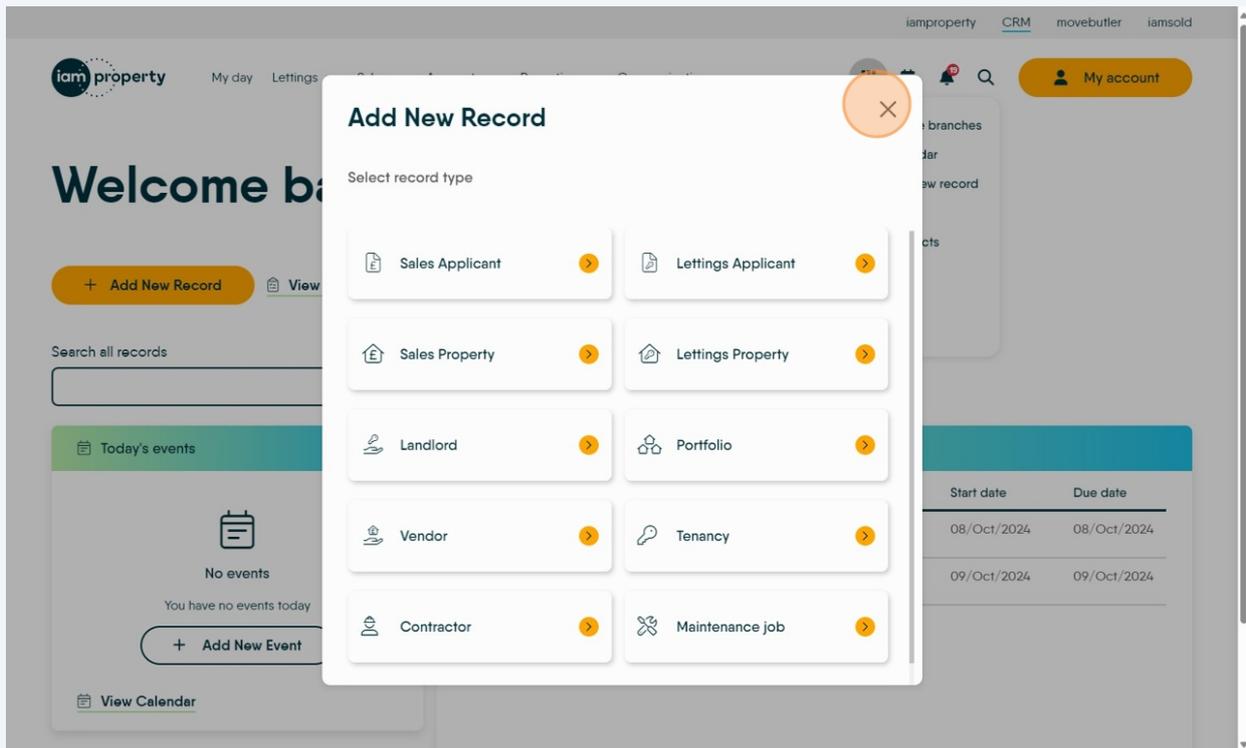


3 Click "Add new record"



4

From the menu select the type of record you wish to create. In this case Click "Sales Property"



5

Once in the Property Record. Click the "Postcode" field. Add the Postcode for the property and click the search icon.

negotiator Training Dave

Branch Morgan & Co

Status

Property address

 Edit address

Postcode 

Address

Price/instructed date

Currency GBP

ilable

tiator Training Dave

Branch Morgan & Co

Status

Property address

 Edit address

Postcode DL13EY 

Address

Price/instructed date

Currency GBP

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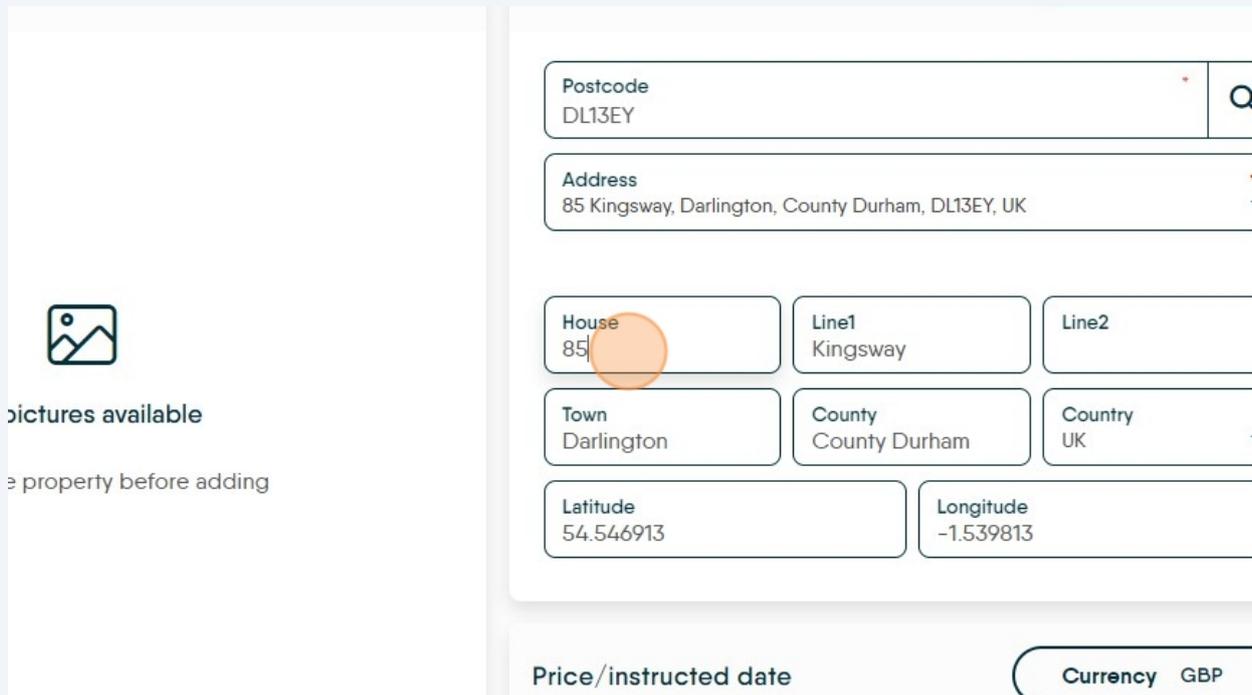
6 Select the address from the drop down menu.

The screenshot shows a web form with a dropdown menu open. The dropdown menu lists five addresses, all starting with "77 Kingsway, Darlington, County Durham, DL13EY, UK" and ending with "DL13EY, UK". The address "85 Kingsway, Darlington, County Durham, DL13EY, UK" is highlighted in grey. Below the dropdown menu is a label "Address" and a placeholder text "-- Select Address --". To the right of the dropdown menu is a button labeled "Currency GBP".

7 If the address of the property you are adding is not available or not correct, click "Edit address"

The screenshot shows a web form with a section titled "Property address". There is a button labeled "Edit address" with a location pin icon. Below the button are two input fields: "Postcode" with the value "DL13EY" and a search icon, and "Address" with the value "85 Kingsway, Darlington, County Durham, DL13EY, UK". Above the "Property address" section are three dropdown menus: "tiator Training Dave", "Branch Morgan & Co", and "Status".

8 Edit the address as required.



0 pictures available
e property before adding

Postcode	DL13EY	Q
Address 85 Kingsway, Darlington, County Durham, DL13EY, UK		
House 85	Line1 Kingsway	Line2
Town Darlington	County County Durham	Country UK
Latitude 54.546913	Longitude -1.539813	

Price/instructed date Currency GBP



Once you have added the Vendor and clicked 'Save' you will have created a basic property record. As previously mentioned there are many more options that you can complete to give a much better record of the property.



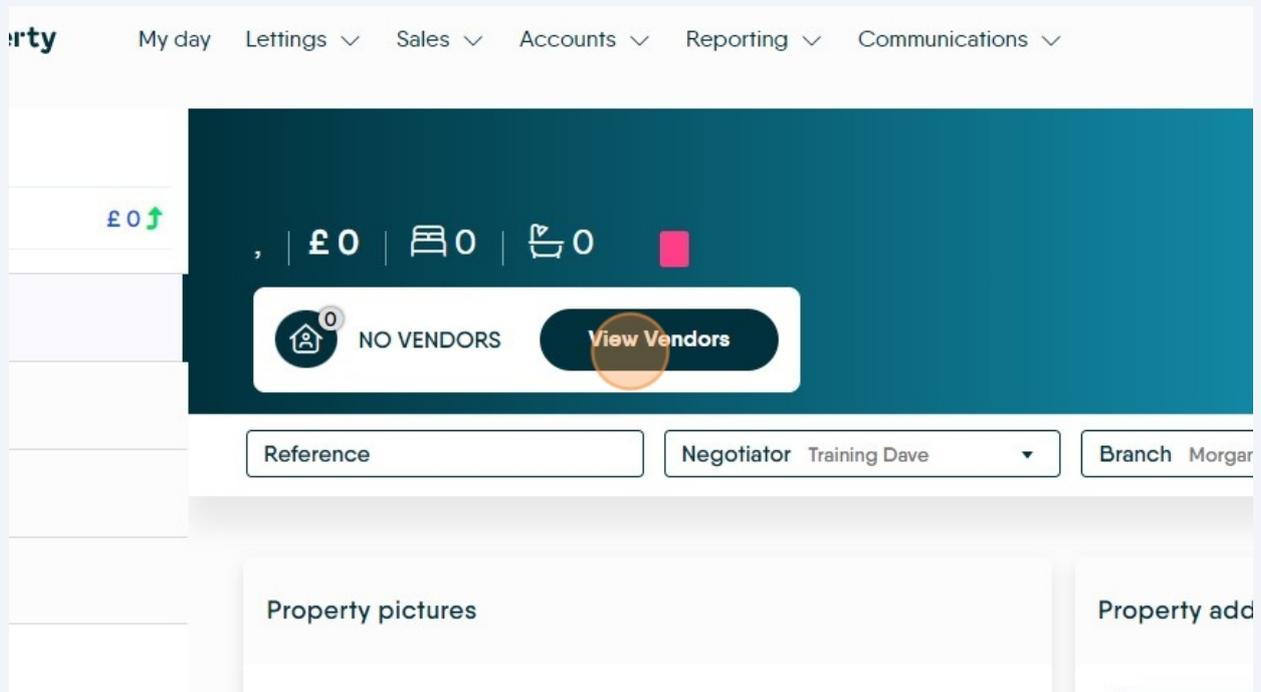
To create a Property Record, you need to have a Vendor. The Vendor record can be created before the property, or during the creation of a new property record.

Creating the Vendor Record

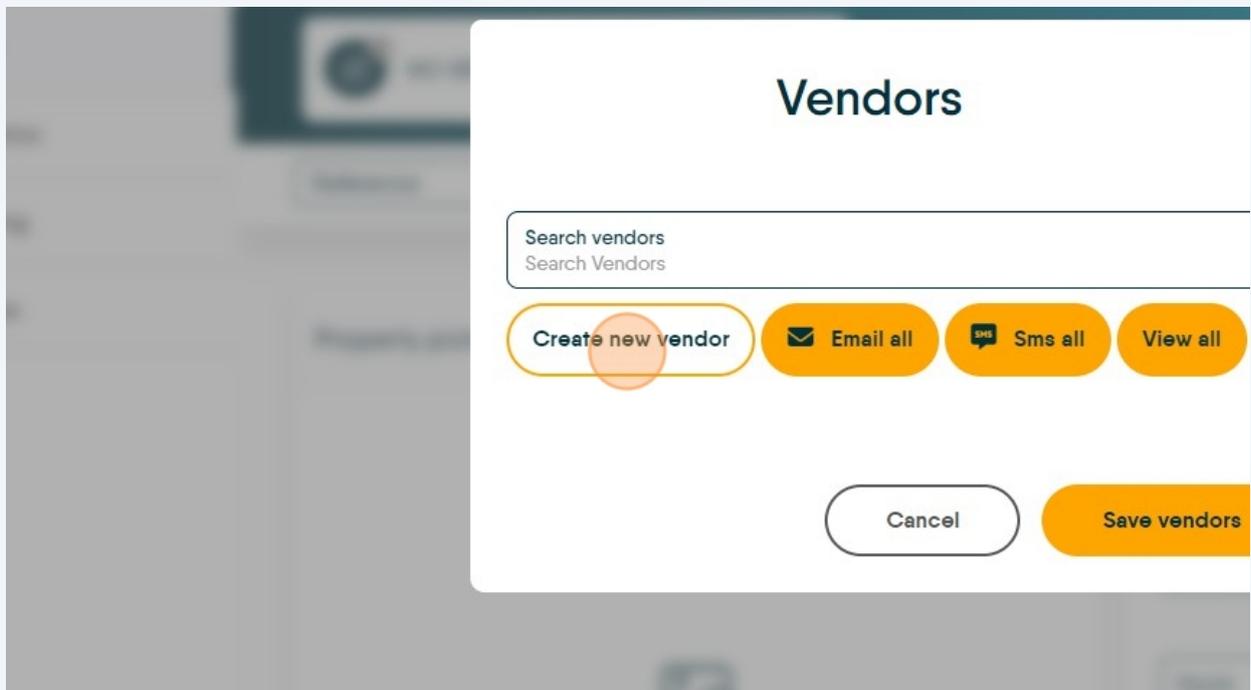


Alert! If you have a property with 2 or more Vendors, a separate vendor record should be created for each and added to the Property Record. This is to help when you link the property and vendors into movebutler.

9 Scroll to the top of the Property Record screen and Click "View Vendors"

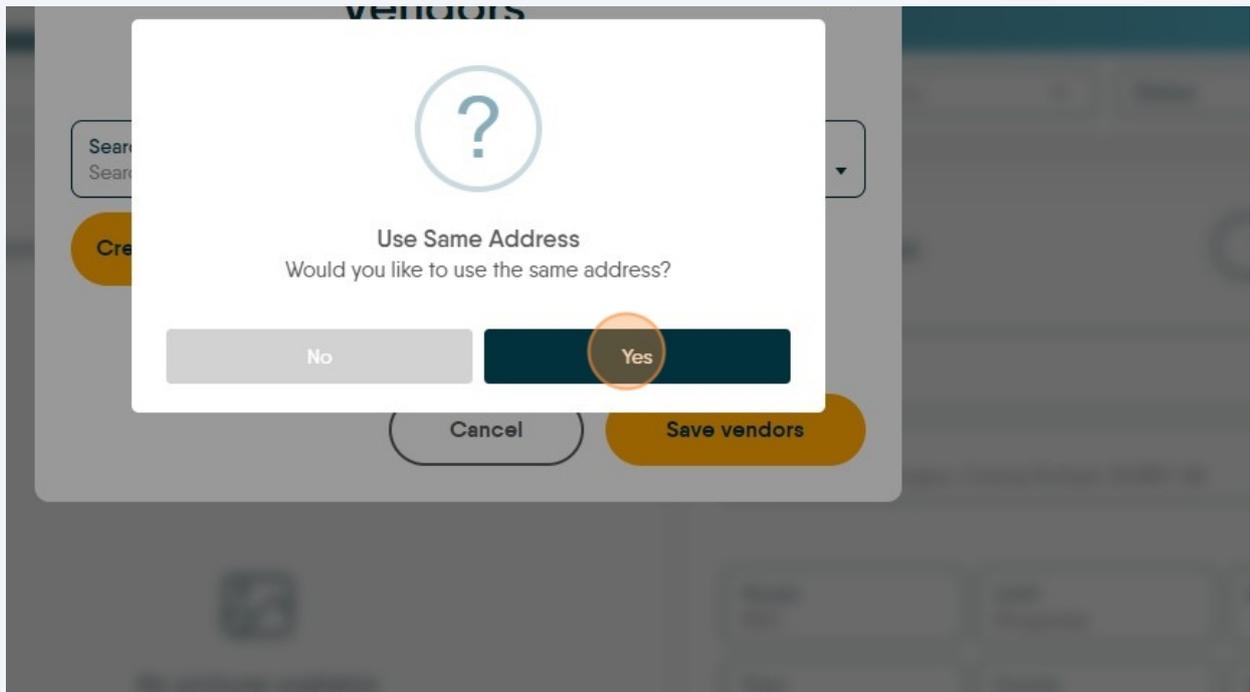


10 Click "Create new vendor" to create a new Vendor (as we will do here) or click into the search field to find an existing Vendor record.



11

If the Vendors are currently living at the address and this is their primary contact address Click "Yes".



The minimum information we require is Surname and email address. Best practice is to complete as many of the information fields as possible.

12 Click the "Surname" field.

 Details

Personal information  Import

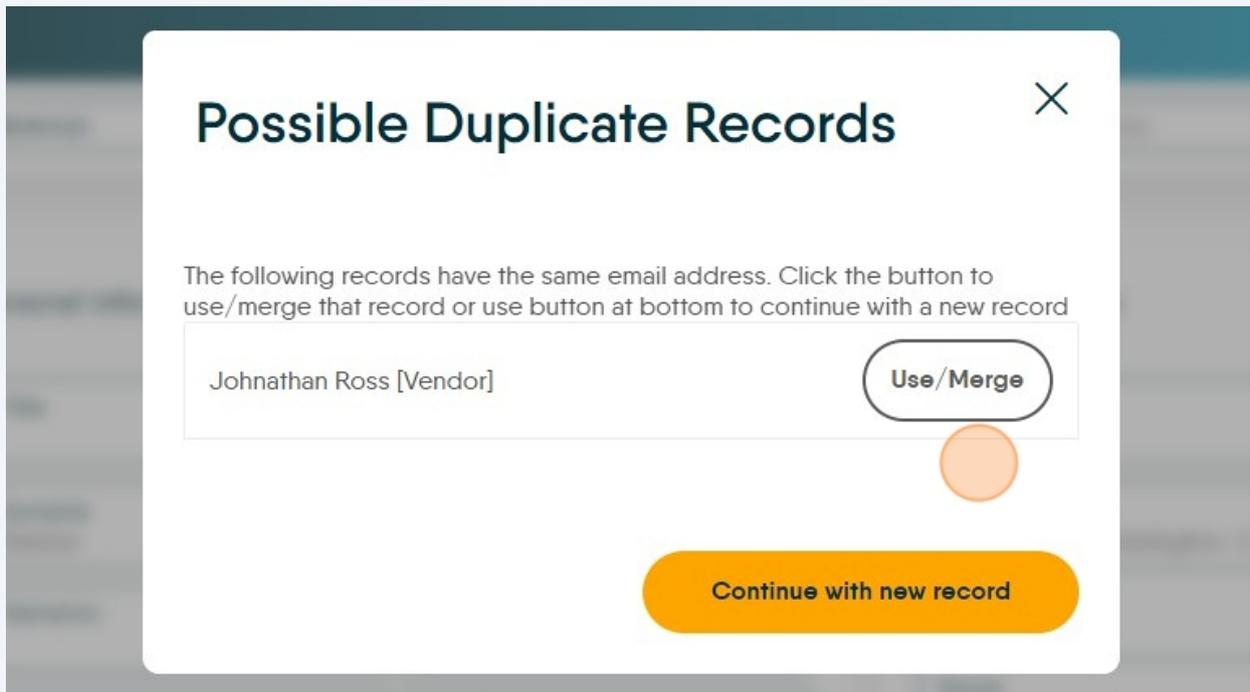
Title <input type="text"/>	Forename <input type="text"/>
Surname <input type="text"/>	Company name <input type="text"/>
Salutation <input type="text"/> 	
Website <input type="text"/>	Phone number <input type="text"/>
Work phone <input type="text"/>	Mobile phone <input type="text"/> 
Email address <input type="text"/>	<input type="text"/>

13 Click the "Email Address" field.

Title <input type="text"/>	Forename <input type="text"/>
Surname <input type="text" value="Barber"/>	Company name <input type="text"/>
Salutation <input type="text"/> 	
Website <input type="text"/>	Phone number <input type="text"/>
Work phone <input type="text"/>	Mobile phone <input type="text"/> 
Email address <input type="text"/> 	Source <input type="text" value="Advert"/>

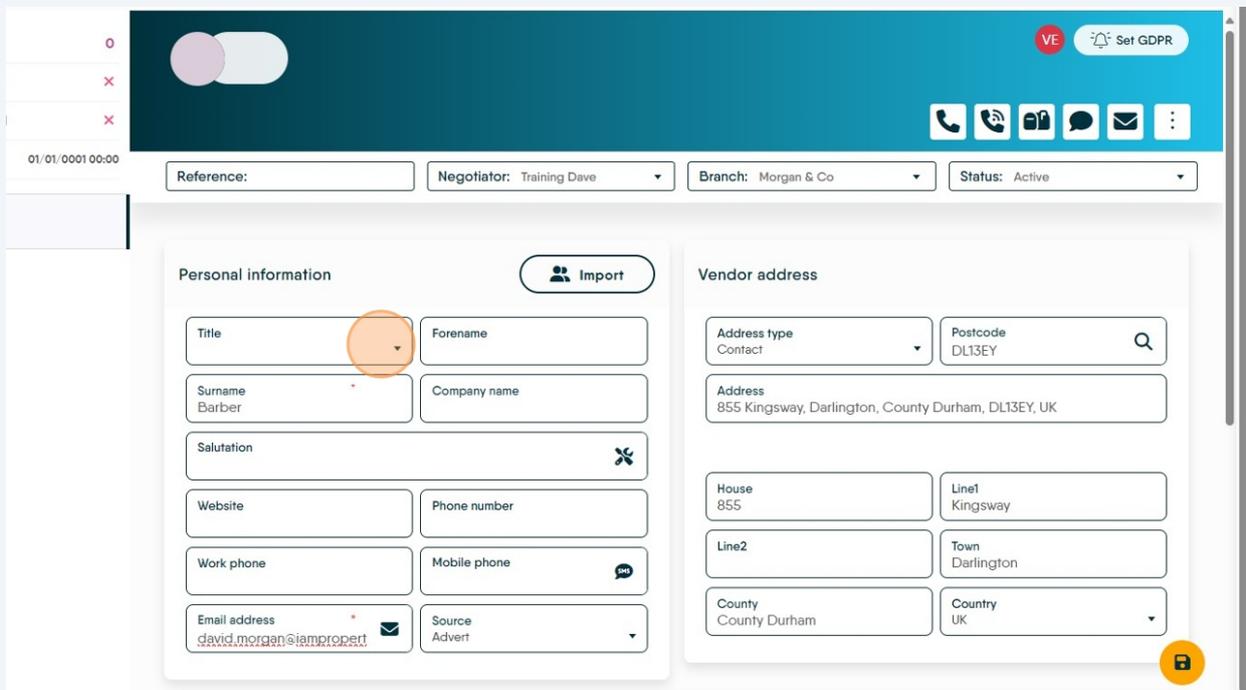
14

If the email address has been used before CRM will alert you and give the option to Use/Merge the original record or continue with the new record.



15

Complete as much of the record as possible. The minimum required is Surname and email address.



16

We advise creating the Salutation as it is one of the templates tags for letters, emails and SMS. If not created the field would show as blank. To create the Salutation click here.

Personal information Import

Title Mr	Forename Andrew
Surname Barber	Company name
Salutation	Build Salutation
Website	Phone number
Work phone	Mobile phone SMS
Email address david.morgan@iamproperty	Source Advert

Vendor address

Address type Contact	Postcode DL13EY
Address 855 Kingsway, Darlington, County Durham, DL13EY, UK	
House 855	Line1 Kingsway
Line2	Town Darlington
County County Durham	Country UK

17

Click here to save your edits. This will create more menu options in the left menu.

As with the property record it is best practice to complete all of the fields that you have information for, either at this point or return to update.

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

Personal information Import

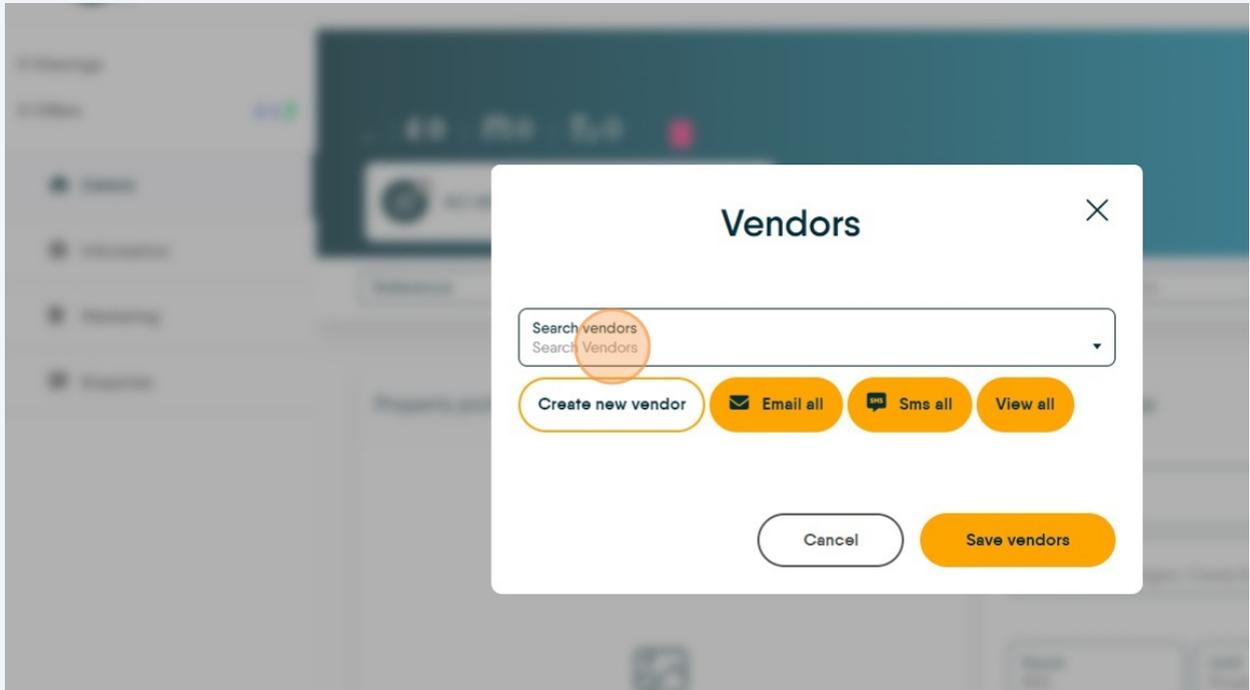
Title Mr	Forename Andrew
Surname Barber	Company name
Salutation Mr Barber	
Website	Phone number 01325464644
Work phone	Mobile phone 07885464626 SMS
Email address david.morgan@iamproperty	Source Advert

Vendor address

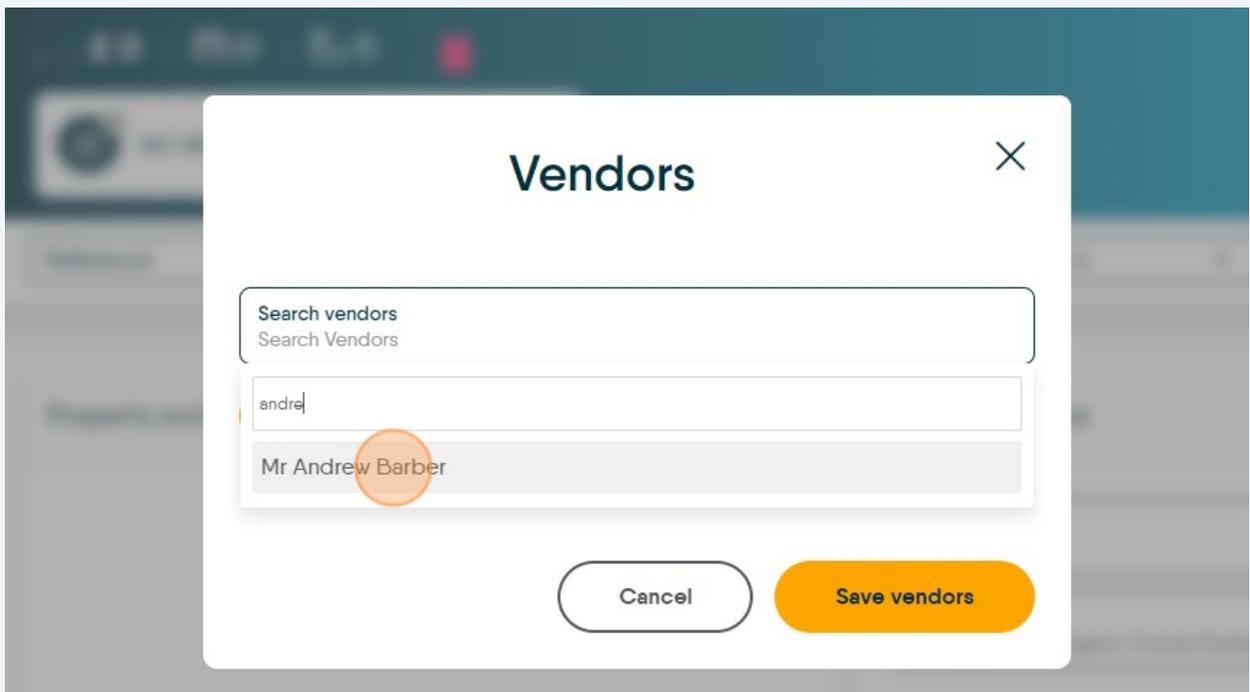
Address type Contact	Postcode DL13EY
Address 855 Kingsway, Darlington, County Durham, DL13EY, UK	
House 855	Line1 Kingsway
Line2	Town Darlington
County County Durham	Country UK

Save Changes

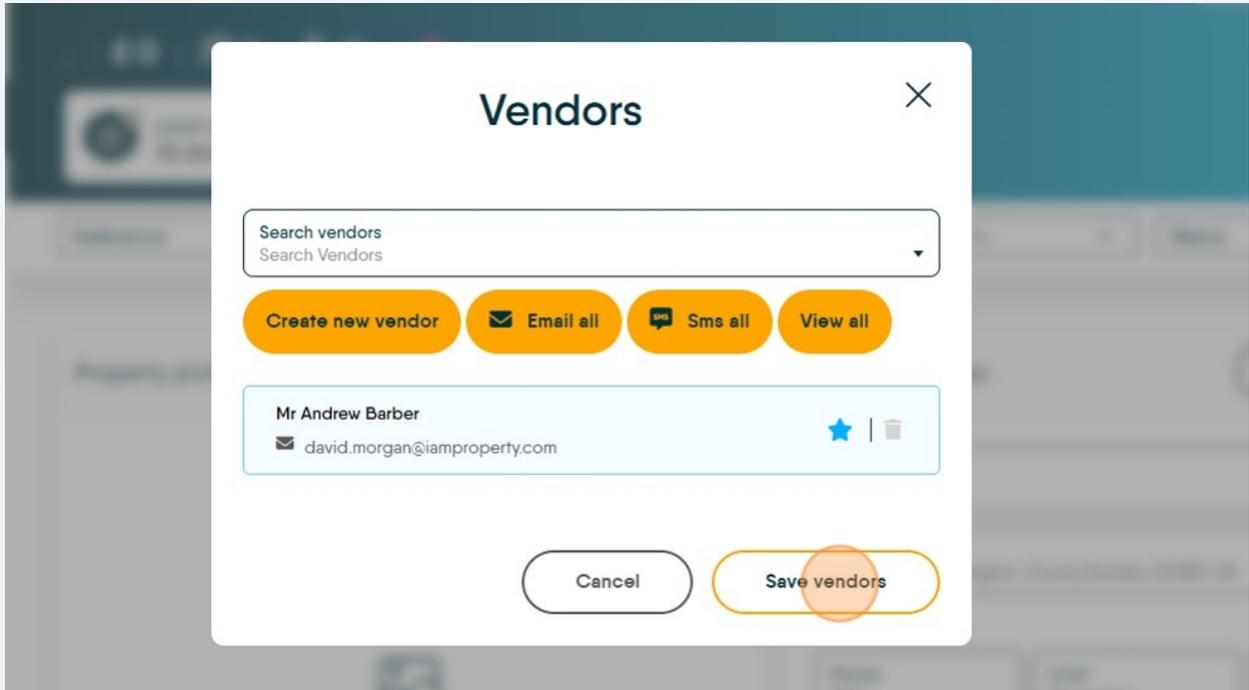
18 Return to the Property screen and search for your Vendor



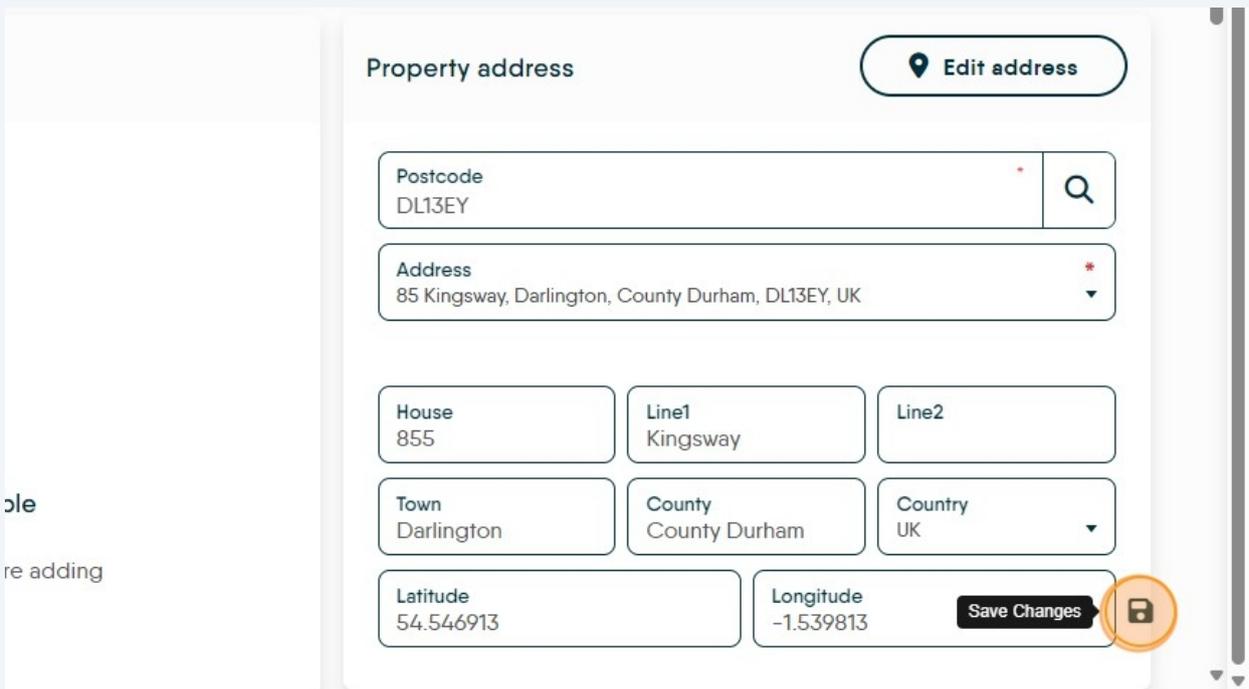
19 Select the Vendor you are adding from the drop down menu.



20 Click "Save vendors"



21 You can now save the Property Record and continue to create the property record.





Tip! Once saved the property record will have more options down the left side of the screen that can be completed to add further detail to the property. It is important that these are completed as soon as you have the appropriate information.