

Transferring Property Data in CRM

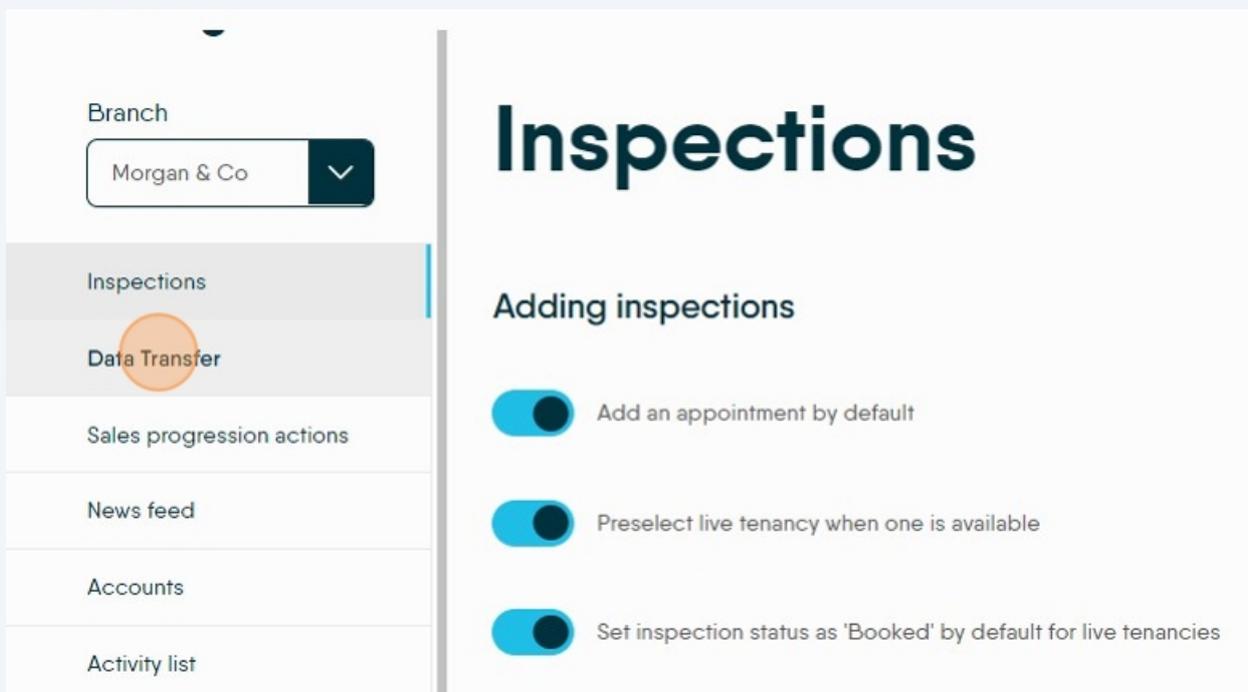


This guide provides a step-by-step approach to transferring property data within the CRM system between negotiators and branches.

It simplifies the process, ensuring that even those with minimal experience can follow along and successfully complete data transfers. By following the outlined steps, users can save time and reduce errors in their property management tasks.

- 1 Navigate to <https://crm.iamproperty.com/ControlCentre/Configuration/New/Inspections>

- 2 Click "Data Transfer"



3 Click this dropdown.

Data transfer - sales

Sales Lettings

Select which records to transfer

Select branch you'd like to transfer from

Morgan & Co

Find the record, add to the list and submit to complete the transfer.

Record type

Source negotiator

Destination branch

Destination negotiator

Add negotiators to transfer...

Transfer

4 Select the "Properties" option.

Sales Lettings

Select which records to transfer

Select branch you'd like to transfer from

Morgan & Co

Find the record, add to the list and submit to complete the transfer.

Record type

Source negotiator

Destination branch

Destination negotiator

Add negotiators to transfer...

Transfer

5 Select the Negotiator you are transferring the information from.

Select branch you'd like to transfer from

Morgan & Co 

Find the record, add to the list and submit to complete the transfer.

Record type

Properties 

Source negotiator

Training Dave 

Destination branch



Add negotiators to transfer...



6 Select the "Destination Branch" from the drop down.



ete the transfer.

negotiator

g Dave 

Destination branch

Morgan&Co MB 

Destination negotiator

None found  Loading... 

7

Click this drop down and select the name of the Negotiator you are transferring the data to.

Transfer from

Transfer from

and submit to complete the transfer.

Source negotiator: Training Dave

Destination branch: Morgan&Co MB

Destination negotiator: [dropdown menu]

or...

8

Click here.

Accounts

Activity list

Online bookings

UDF settings

Checklists

Lookups

Reports

Viewing templates

Viewing templates

Record type: Properties

Source negotiator: Training Dave

Add negotiators to transfer...

Transfer

9 Click "Lettings"

10 Click this drop-down select the branch you are transferring the data from.

11 Click this drop-down and pick the record type you are transferring..

Select which records to transfer

Select branch you'd like to transfer from

Morgan & Co 

Find the record, add to the list and submit to complete the transfer.

Record type

Source negotiator

Record type required 

Destination branch

Negotiator required

Add negotiators to transfer...



12 For example select the "Properties" option.

Select branch you'd like to transfer from

Morgan & Co 

Find the record, add to the list and submit to complete the transfer.

Record type

Properties  

Source negotiator



Destination branch

Negotiator required

Add negotiators to transfer...



13 Select the "Source Negotiator" option.

I like to transfer from

to the list and submit to complete the transfer.

Source negotiator

Destination branch

Destination

Training Dave

Target br

to transfer...

sfer

14 Select the "Destination Branch" option.

er.

Destination branch

Destination negotiator

Morgan&Co MB

Loading...

+

15 Click this drop-down and select the destination Negotiator.

The screenshot shows a form with two main sections. The top section has a single dropdown menu. The bottom section has two dropdown menus: 'Destination branch' and 'Destination negotiator'. The 'Destination branch' dropdown is currently set to 'Morgan&Co MB'. The 'Destination negotiator' dropdown is empty and highlighted with a red circle. To the right of the 'Destination negotiator' dropdown is a plus sign icon.

16 Click here to add the selection.

The screenshot shows the same form as in step 15. The 'Destination negotiator' dropdown menu is now selected, and a plus sign icon is visible to its right. The 'Destination branch' dropdown remains set to 'Morgan&Co MB'.

17 Click here to transfer the data.

- Counts
- Activity list
- Online bookings
- PDF settings
- Checklists
- Bookings
- Reports
- Booking templates
- Booking templates

Record type

Properties

Source negotiator

Training Dave

Add negotiators to transfer...

 Transfer