

Adding a New Portfolio



This guide provides a straightforward, step-by-step process for adding a new portfolio record in the CRM system, ensuring users can effectively manage property information.

By following these clear instructions, users can enhance their organisational skills and streamline their workflow. It's an essential resource for anyone looking to optimise their use of the CRM platform, making it easier to track and manage portfolios efficiently.

1 Click "Sign In"

1 Still getting used to new-look CRM?
If so, you can still use the previous CRM by clicking the link on the right.

[Click here](#)

Sign in

Username

Password

Remember me

[Forgot your password?](#)

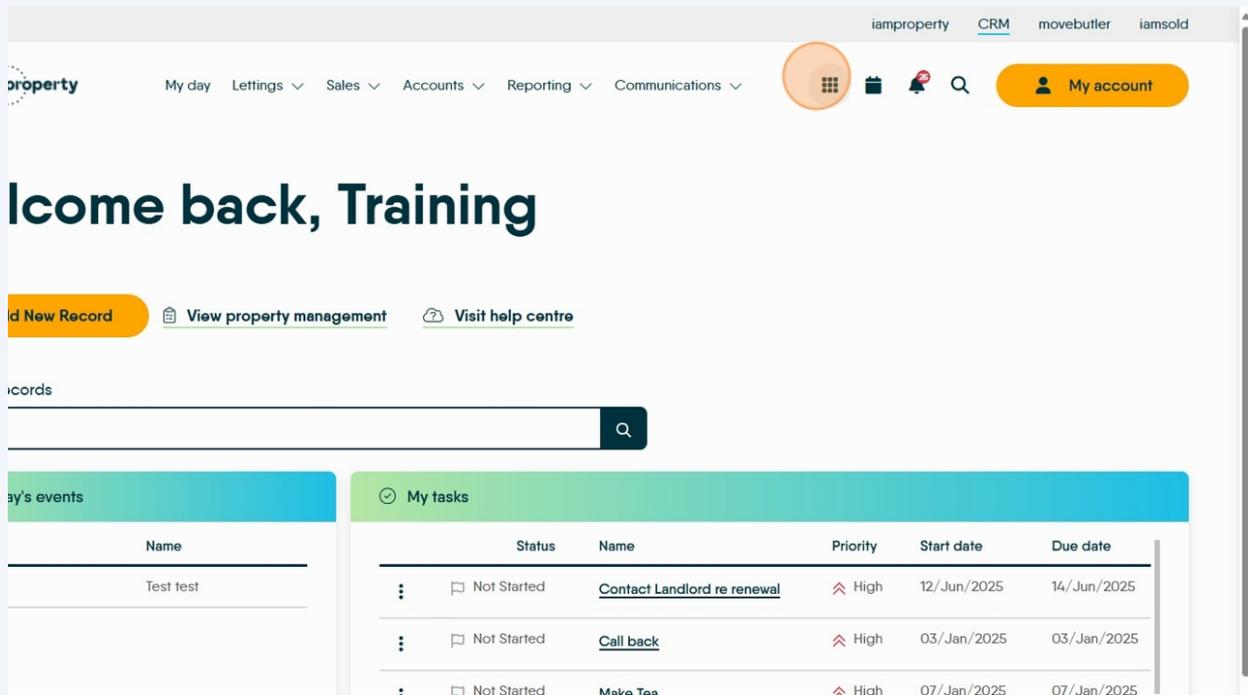


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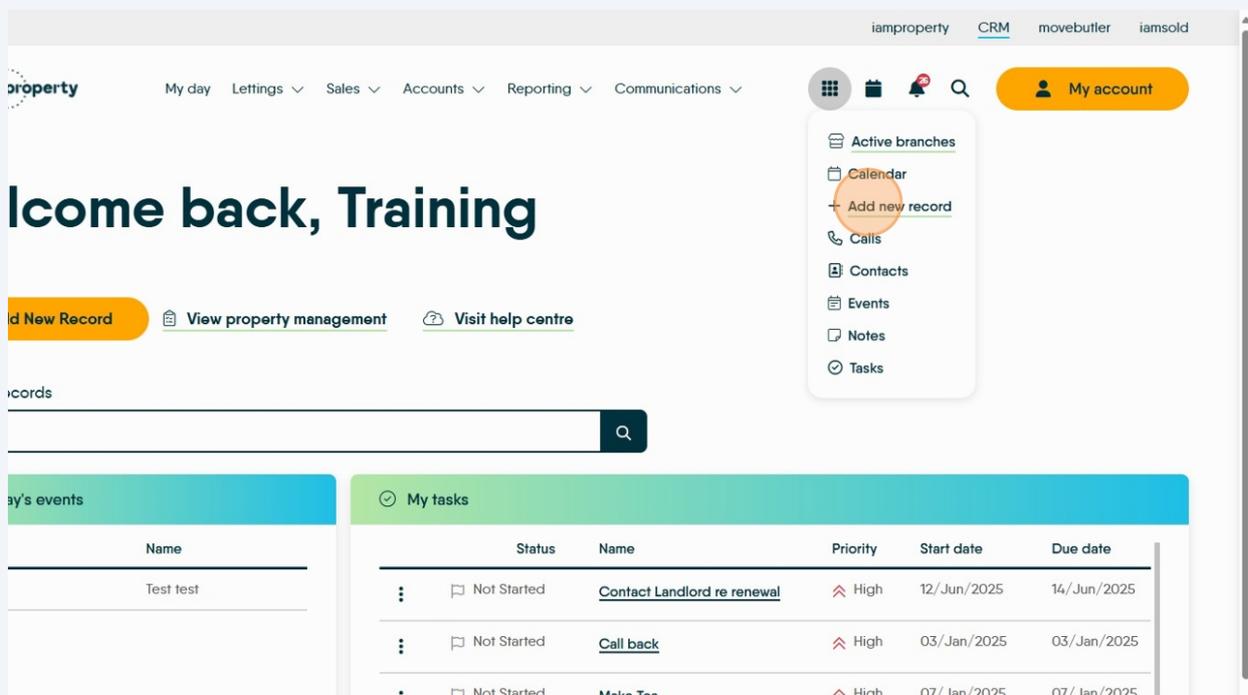
2 Click "More actions"



The screenshot shows the CRM dashboard with the 'More actions' menu highlighted. The dashboard includes a navigation bar with 'iamproperty', 'CRM', 'movebutler', and 'iamsold'. Below the navigation bar, there are tabs for 'My day', 'Lettings', 'Sales', 'Accounts', 'Reporting', and 'Communications'. The main heading is 'I come back, Training'. Below the heading, there is a 'Add New Record' button and links for 'View property management' and 'Visit help centre'. A search bar is present below the links. The dashboard is divided into two main sections: 'My events' and 'My tasks'. The 'My tasks' section contains a table with the following data:

Status	Name	Priority	Start date	Due date
Not Started	Contact Landlord re renewal	High	12/ Jun/2025	14/ Jun/2025
Not Started	Call back	High	03/ Jan/2025	03/ Jan/2025
Not Started	Make Tea	High	07/ Jan/2025	07/ Jan/2025

3 Click "Add new record"



The screenshot shows the CRM dashboard with the 'Add new record' option highlighted in the 'More actions' menu. The dashboard layout is identical to the previous screenshot, but the 'More actions' menu is open, showing options like 'Active branches', 'Calendar', 'Add new record', 'Calls', 'Contacts', 'Events', 'Notes', and 'Tasks'. The 'Add new record' option is highlighted with an orange circle.

4 Click "Portfolio"

The screenshot shows a software interface with a modal dialog titled "Add New Record". The dialog is divided into two sections:

- Select appointment type:** Contains four options: "Sales Appraisal", "Lettings Appraisal", "Sales Viewing", and "Lettings Viewing".
- Select record type:** Contains five options: "Sales Applicant", "Lettings Applicant", "Sales Property", "Lettings Property", and "Portfolio". The "Portfolio" option is highlighted with an orange circle.

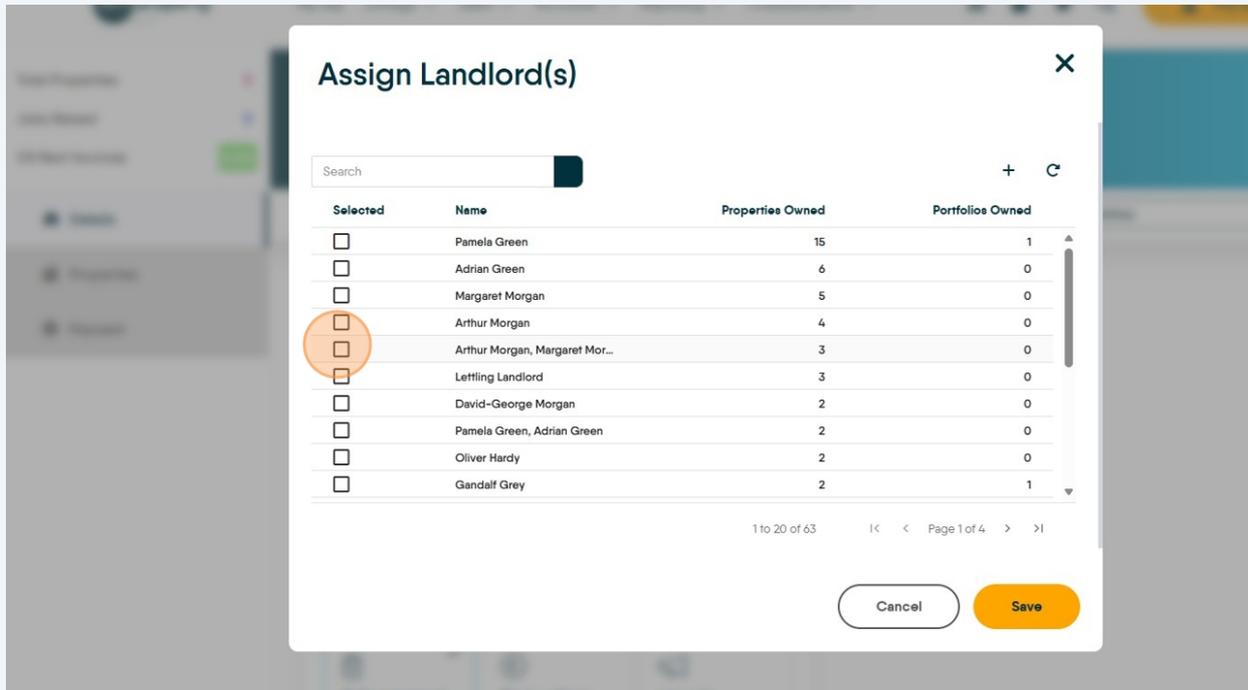
In the background, a table is visible with the following data:

Name	Start date	Due date
Test test	12/ Jun/2025	14/ Jun/2025
	03/ Jan/2025	03/ Jan/2025
	07/ Jan/2025	07/ Jan/2025
	28/ Jan/2025	28/ Jan/2025
	04/ Feb/2025	04/ Feb/2025

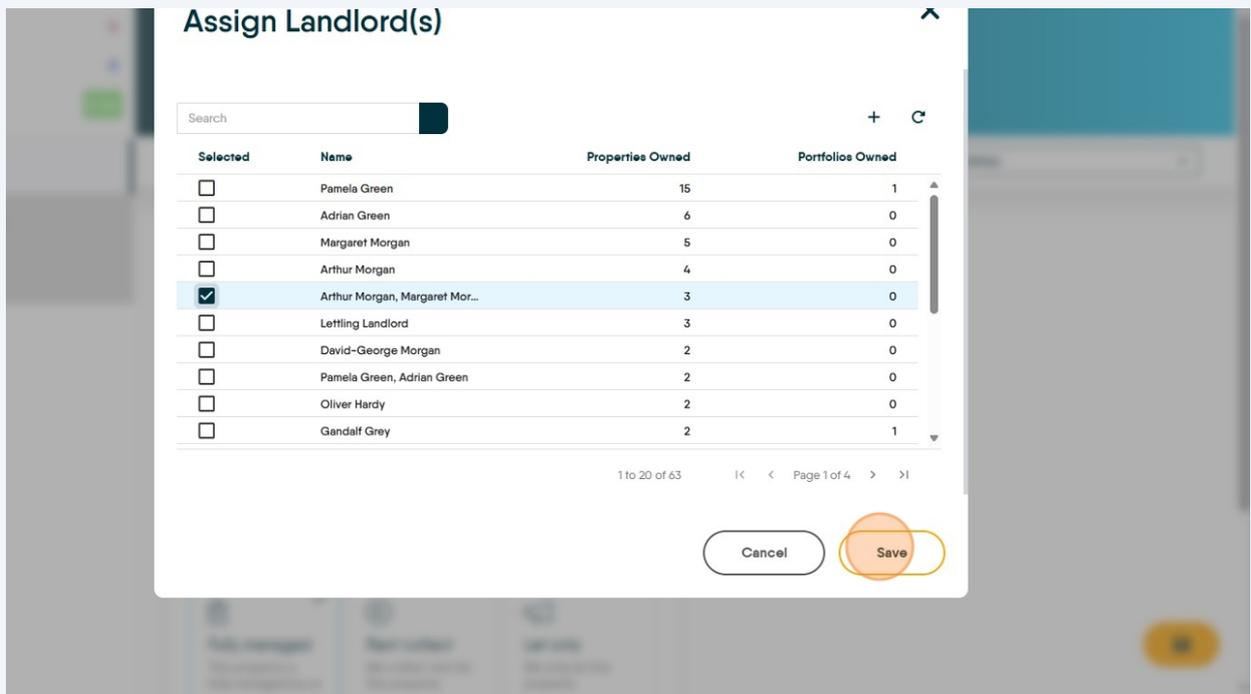
5 Select the Landlord who you are creating the Portfolio for.

The first screen will show a list of your Landlords with the number of properties they own and the number of Portfolios they own. Select the Landlord you are creating the Portfolio for and click Save.

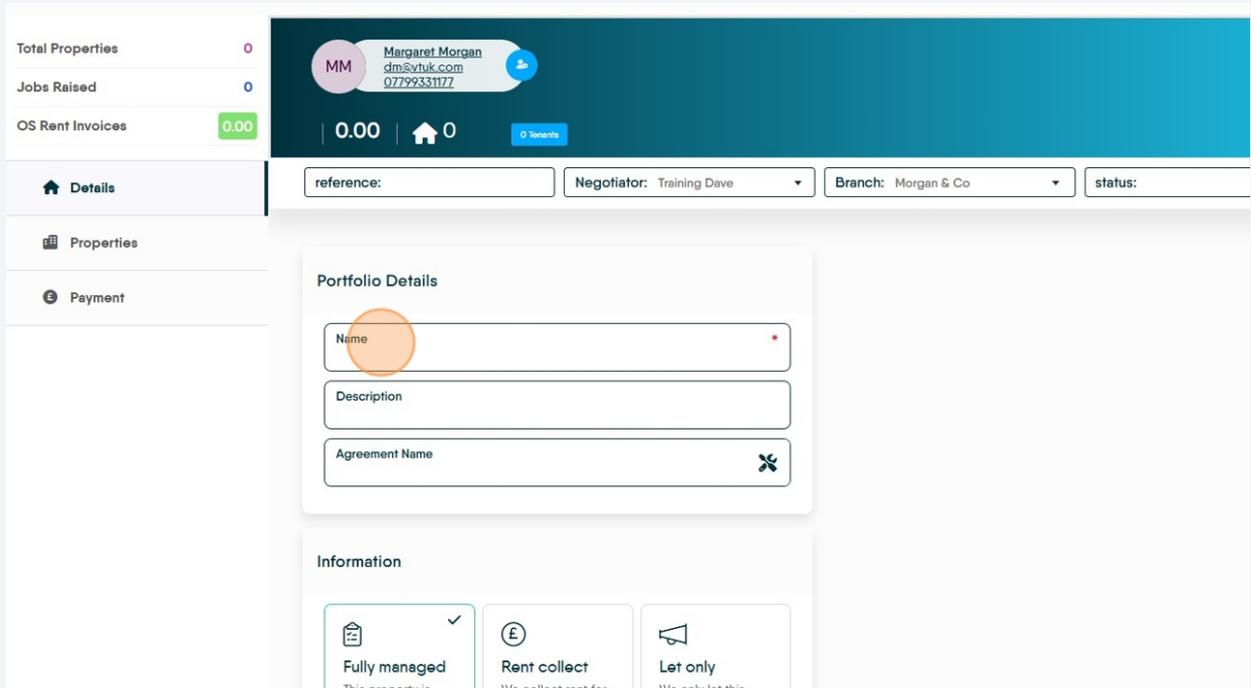
Once a property is part of a portfolio, it can only be removed if there have been no financial transactions against it.

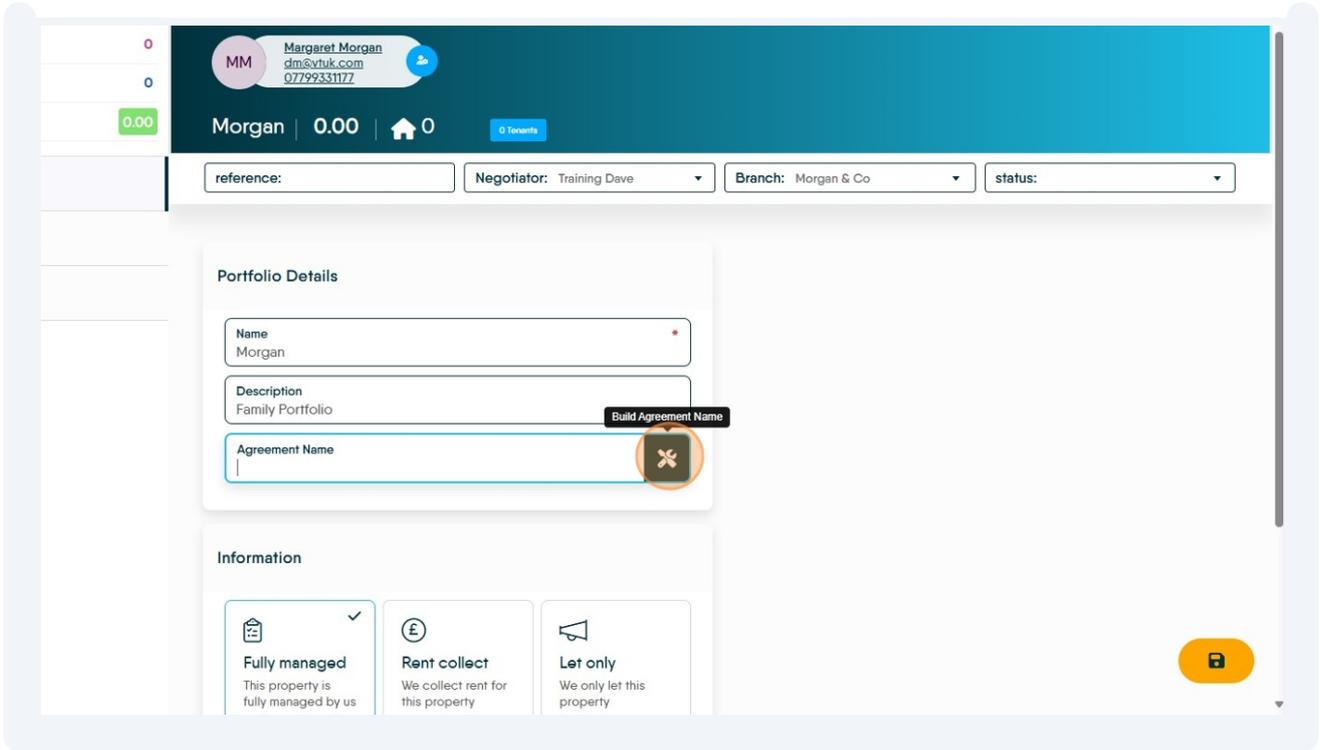


6 Click "Save"



7 Click the "Name" field and name the Portfolio, give it a description and set the Portfolio agreement name. Click here.

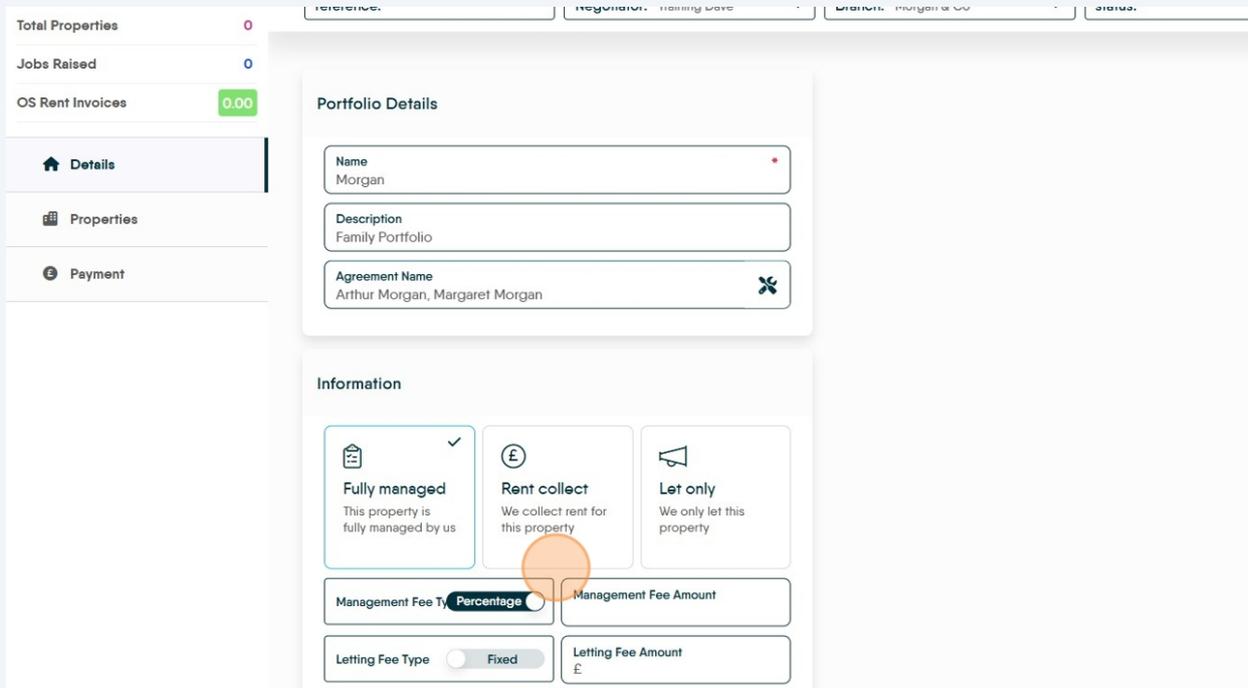




8

If all properties in the portfolio will have the same level of management and fees, you can set them here. Ensure you also set the management level in the property record.

N.B. The Management Fee and Letting Fee is now set to the Portfolio level. If a property requires a different level of fees, it should not be added to the portfolio.



9 Click "Properties"

iamproperty CRM movebutle

My day Lettings Sales Accounts Reporting Communications

Total Properties 0
Jobs Raised 0
OS Rent Invoices 0.00

Details
Properties
Payment

Portfolio Details

Name: Morgan

Description: Family Portfolio

Agreement Name: Arthur Morgan, Margaret Morgan

Information

Fully managed (checked)
This property is fully managed by us

Rent collect
We collect rent for this property

Let only
We only let this property

Management Fee Type: Percentage Management Fee Amount

10 In the Properties tab, scroll down to the 'Available' section and click on the + icon next to the Property to add it to the portfolio. It will then appear in the 'Selected' section.

Total Properties 0
Jobs Raised 0
OS Rent Invoices 0.00

Details
Properties
Payment

Selected

No selected properties

Available

Property	Asking Rent	Current Tenants	Current Portf
319 Yew Tree Close, Hurworth, Darlington	£ 1,300.00	1	
771 Pelaw Crescent, Chester le Street	£ 1,500.00	1	
228 Yew Tree Close, Hurworth, Darlington	£ 1,500.00	0	

11

Click here to select the Properties. Not all Properties owned by the Landlord need to be in the Portfolio..
Click here.

Total Properties 0
Jobs Raised 0
OS Rent Invoices £ 0.00

Details

Properties

Payment

Selected

Property	Asking Rent	Current
<input checked="" type="checkbox"/> 319 Yew Tree Close, Hurworth, Darlington	£ 1,300.00	

1 to 1 of 1 Page 1 of 1

Available

Property	Asking Rent	Current Tenants	Current Portfolio
<input checked="" type="checkbox"/> 771 Pelaw Crescent, Chester le Street	£ 1,500.00	1	
<input type="checkbox"/> 228 Yew Tree Close, Hurwor...	£ 1,500.00	0	

Total Properties 0
Jobs Raised 0
OS Rent Invoices £ 0.00

Details

Properties

Payment

Selected

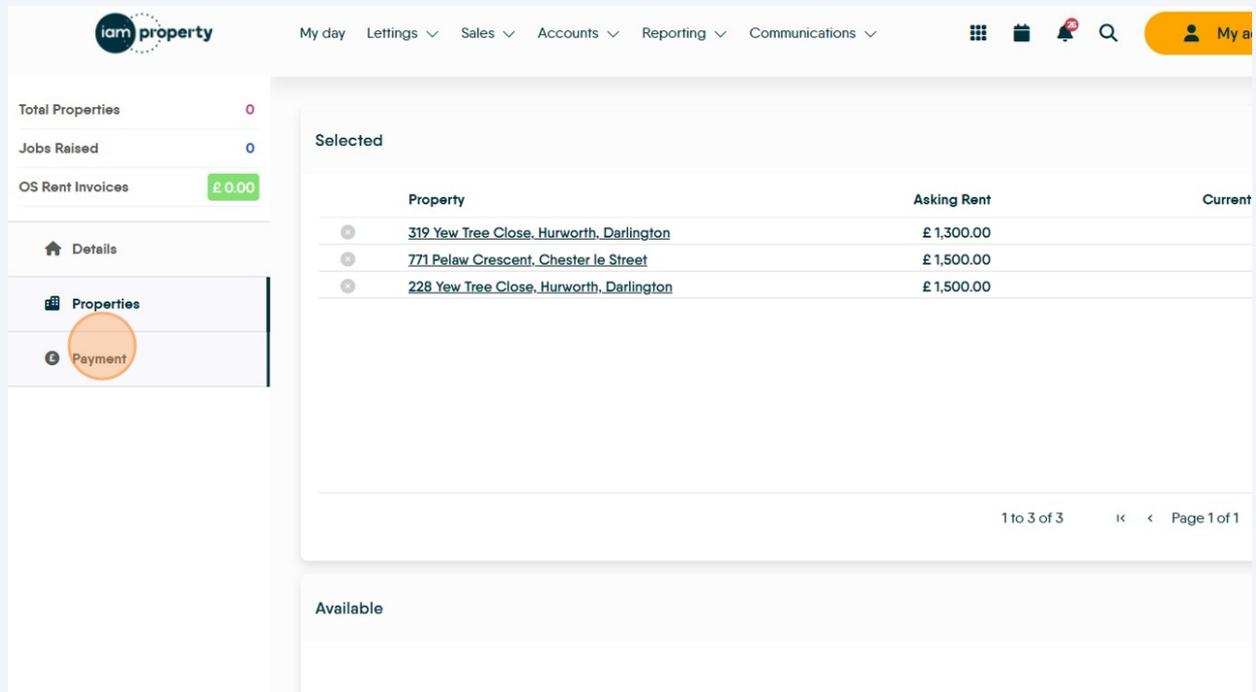
Property	Asking Rent	Current
<input checked="" type="checkbox"/> 319 Yew Tree Close, Hurworth, Darlington	£ 1,300.00	
<input checked="" type="checkbox"/> 771 Pelaw Crescent, Chester le Street	£ 1,500.00	

1 to 2 of 2 Page 1 of 1

Available

Property	Asking Rent	Current Tenants	Current Portfolio
<input checked="" type="checkbox"/> 228 Yew Tree Close, Hurwor...	£ 1,500.00	0	

12 Click "Payment"



The screenshot shows the 'iam property' dashboard. The top navigation bar includes 'My day', 'Lettings', 'Sales', 'Accounts', 'Reporting', and 'Communications'. The left sidebar has 'Details', 'Properties', and 'Payment' (highlighted with an orange circle). The main area shows a table of 'Selected' properties:

Property	Asking Rent	Current
319 Yew Tree Close, Hurworth, Darlington	£ 1,300.00	
771 Pelaw Crescent, Chester le Street	£ 1,500.00	
228 Yew Tree Close, Hurworth, Darlington	£ 1,500.00	

At the bottom right of the table, it says '1 to 3 of 3' and 'Page 1 of 1'. Below the table is an 'Available' section.



Alert! Payments

In the Payment tab, if the same payment details are being used for the entire portfolio, you can set them here.

Payments can then only be made from the portfolio ledger/portfolio float ledger balances rather than from individual property/float ledger balances.

When a portfolio is created, it is vital that the accounts team are informed as once a property is part of a portfolio, when in the accounts module, you should view transactions in the portfolio ledger and NOT the individual property ledgers.

13

Click here to edit the payment details for the landlords and the payment split between multiple landlords, the payment split must add up to 100%. N.B. If there are 3 landlords, one must get 33.34% to keep the total payment at 100%
Click this text field.
Click "Save"

iamproperty CRM movebutle

My day Lettings Sales Accounts Reporting Communications

Total Properties 0
Jobs Raised 0
OS Rent Invoices £ 0.00

The landlord(s) next payment is due on 27/06/2025
 Same payment day each month

AM

Arthur morgan
zagg.dave@gmail.com
07788996666

Arthur Morgan

50 % £ 0.00

MM

Margaret morgan
dm@vtuk.com
07799331177

Margaret Morgan

50 % £ 0.00

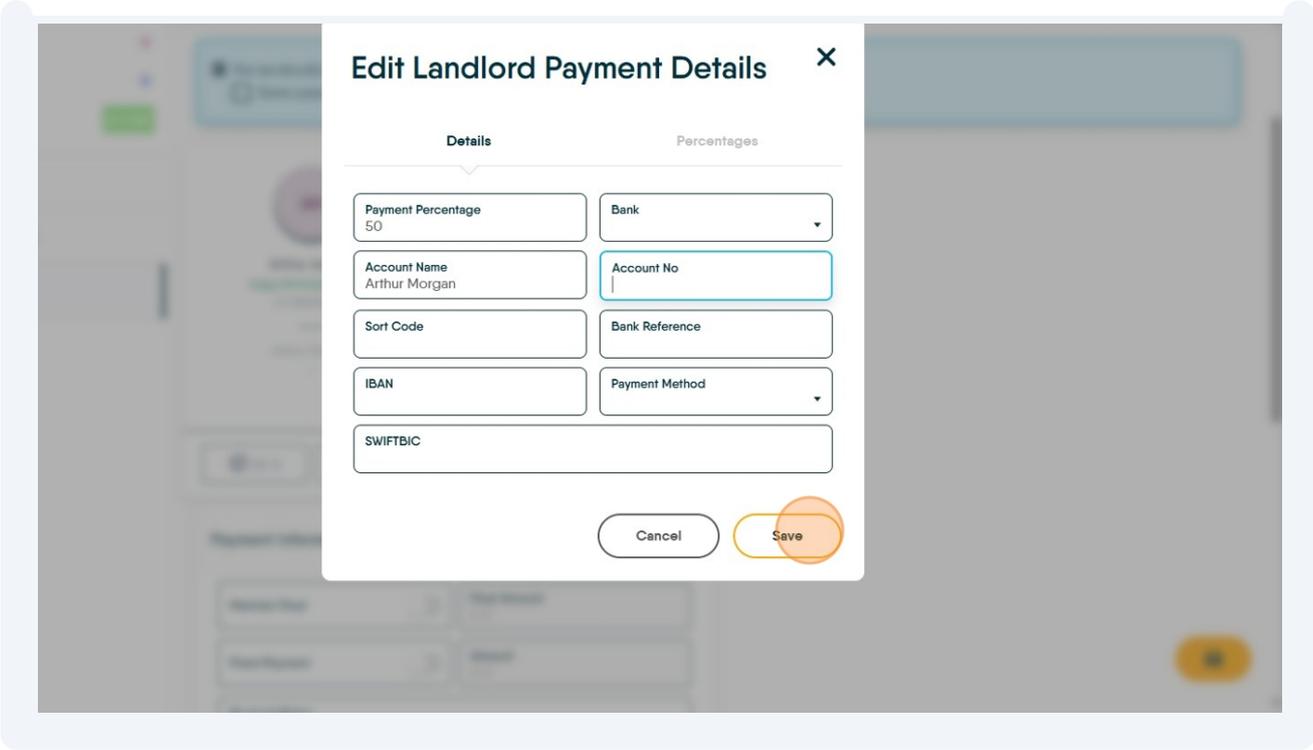
Payment Information

Edit Landlord Payment Details

Details Percentages

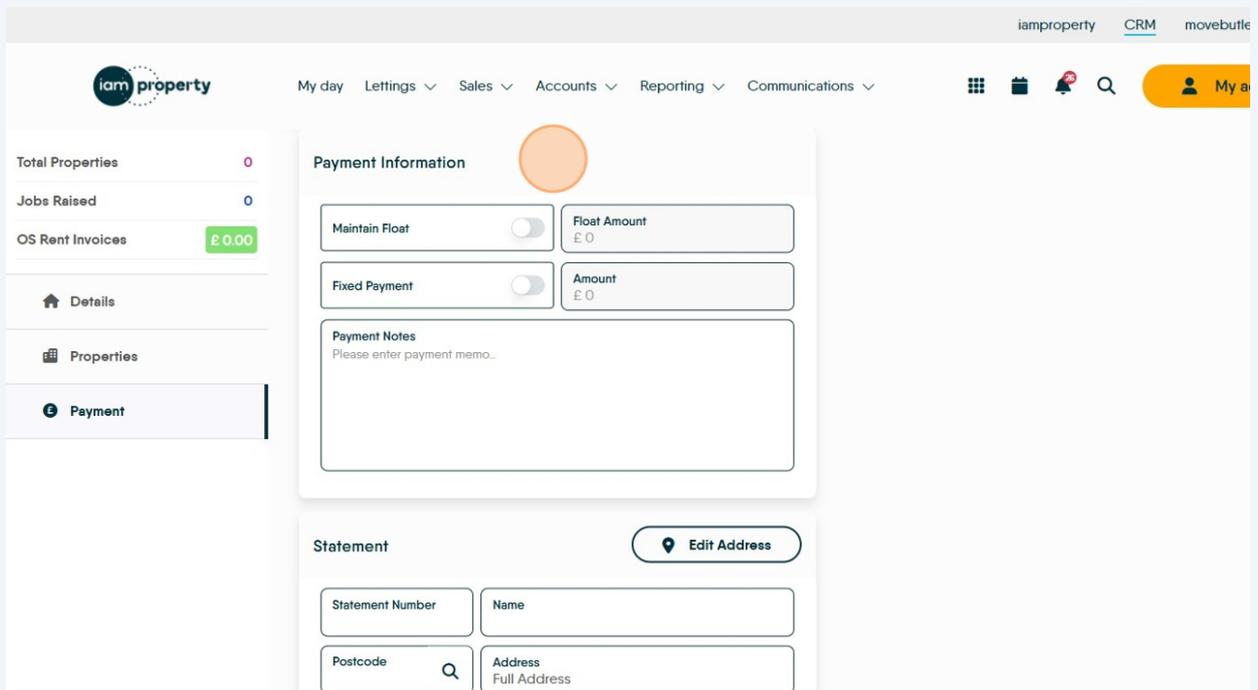
Payment Percentage 50	Bank
Account Name Arthur Morgan	Account No
Sort Code	Bank Reference
IBAN	Payment Method
SWIFTBIC	

Cancel Save



14

Click "Payment Information" here you can set information for the float, in a Portfolio the float can be used to pay expenses created against any of the properties within the portfolio.



15 Click "Statement" to set an address for postal statements

The screenshot shows a software interface with a sidebar on the left and a main content area. The sidebar has a 'Payment' section highlighted. The main content area is divided into two sections. The top section is for 'Fixed Payment' with a toggle switch and an 'Amount' field set to '£ 0'. Below this is a 'Payment Notes' field with the placeholder text 'Please enter payment memo...'. The bottom section is titled 'Statement' and features an orange circular profile picture placeholder and an 'Edit Address' button. It contains four input fields: 'Statement Number', 'Name', 'Postcode' (with a search icon), and 'Address' (with the placeholder 'Full Address'). At the bottom of this section is a dashed box for attachments with the text 'Drag and drop files here or click to upload Statement Attachments' and a file upload icon.

16 Expenses

Expenses will be charged against the portfolio rather than individual properties.

Performing Payments

When performing payments, the accounts team should remember to also change the record type to 'Portfolio' to show the payments available to portfolio landlords.

Statements

Similarly, when performing a statement merge, they will need to remember to also select the Portfolio Statement option in the filter (and email template if different).