

Linking Applicants in CRM



This guide provides a straightforward process for linking applicants in the CRM system, ensuring efficient management of applicant data.

It is important to create separate records for Applicants as this will aid with any referencing and AML checks that are performed from with the CRM/iamproperty suite of products.

View this guide to simplify the linking process and improve your overall productivity in CRM management.

1 Navigate to the Applicant you are linking

The screenshot shows the iam property CRM interface. On the left, a sidebar lists various tabs: Offers, Lettings, Sales, Accounts, Reporting, Communications, Details, Checklist, Viewings, Offers, Linked Applicants, Contacts, and Documents. The 'Details' tab is currently selected. The main content area displays a detailed view of an applicant record for 'Pauline Morgan'. The top bar shows the applicant's name, email (pm@mo.tc), and phone number (140044). Below this, the address is listed as 'Alternative Communication Systems Acer Court, North Leigh Business Park, North Leigh, Witney, Oxfordshire'. The 'Lettings' tab is selected. The 'Personal Information' section contains fields for Title (Mrs), Forename (Pauline), Surname (Morgan), Company Name, Website, Phone Number (0123552255), Work phone, Mobile phone (140044), Email Address (pm@mo.tc), Salutation (Miss), Source, and Temperature (Hot). The 'Applicant Address' section is partially visible at the bottom. The top navigation bar includes links for 'My day', 'Lettings', 'Sales', 'Accounts', 'Reporting', 'Communications', and 'My account'. There are also icons for a grid, a calendar, a search bar, and a bell.

2 Click "Linked Applicants"

Latest Offer £0.00

Offer Status

Status A

Applicant Temp. H

Created 11:07 04/06/2025

Last Contacted

Details

Checklist

Viewings

Offers

Linked Applicants (highlighted with an orange circle)

Contacts

Documents

Journal

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

Personal Information

Title: Mrs	Forename: Pauline	Surname: Morgan	Company Name
Website	Phone Number: 0123552255	Work phone	Mobile phone: 140044
Email Address: pm@mo.tc	Salutation: X	Source	Temperature: Hot

Applicant Address

Postcode: OX29 6SW

Address: Alternative Communication Systems Acer Court, North Leigh Business Park, North Leigh, Witney, Oxfordshire

3 Click "Link Applicant"

Latest Offer £0.00

Offer Status

Status A

Applicant Temp. H

Created 11:07 04/06/2025

Last Contacted

Details

Checklist

Viewings

Offers

Linked Applicants

Contacts

Link Applicant (highlighted with an orange circle)

Sort Applicants

Search

Clear filters

Partner

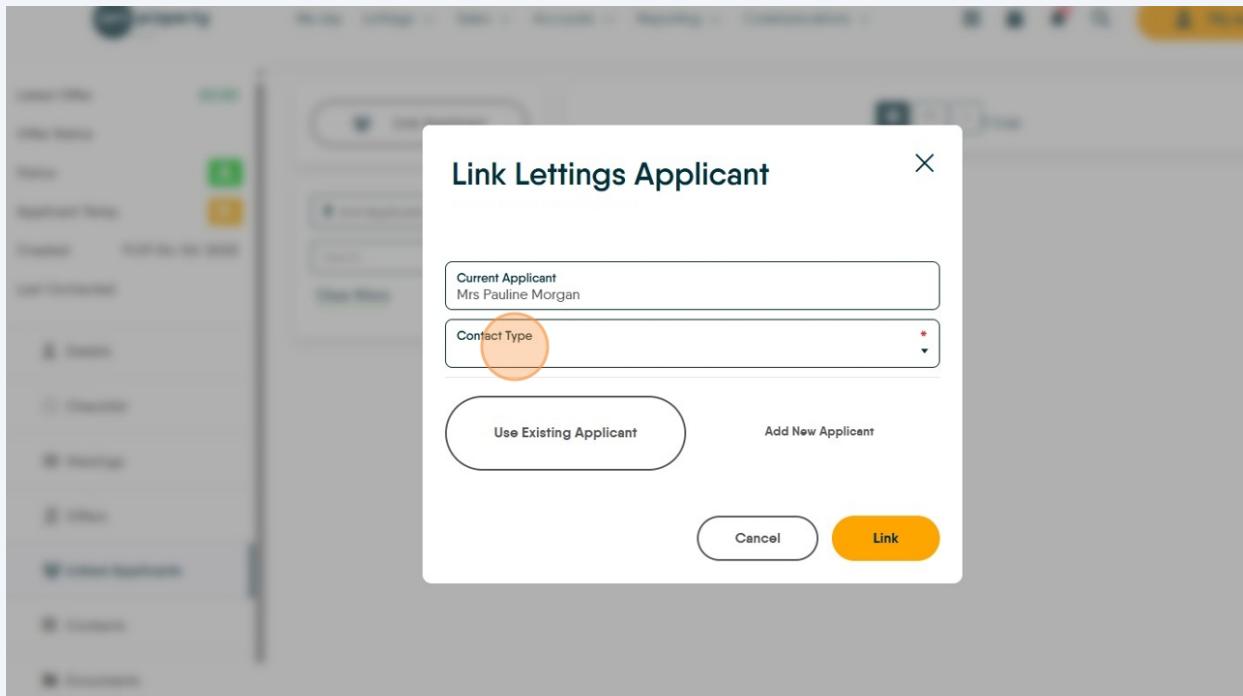
DM

Mr david morgan
crm.training@iamproper...
07802200655

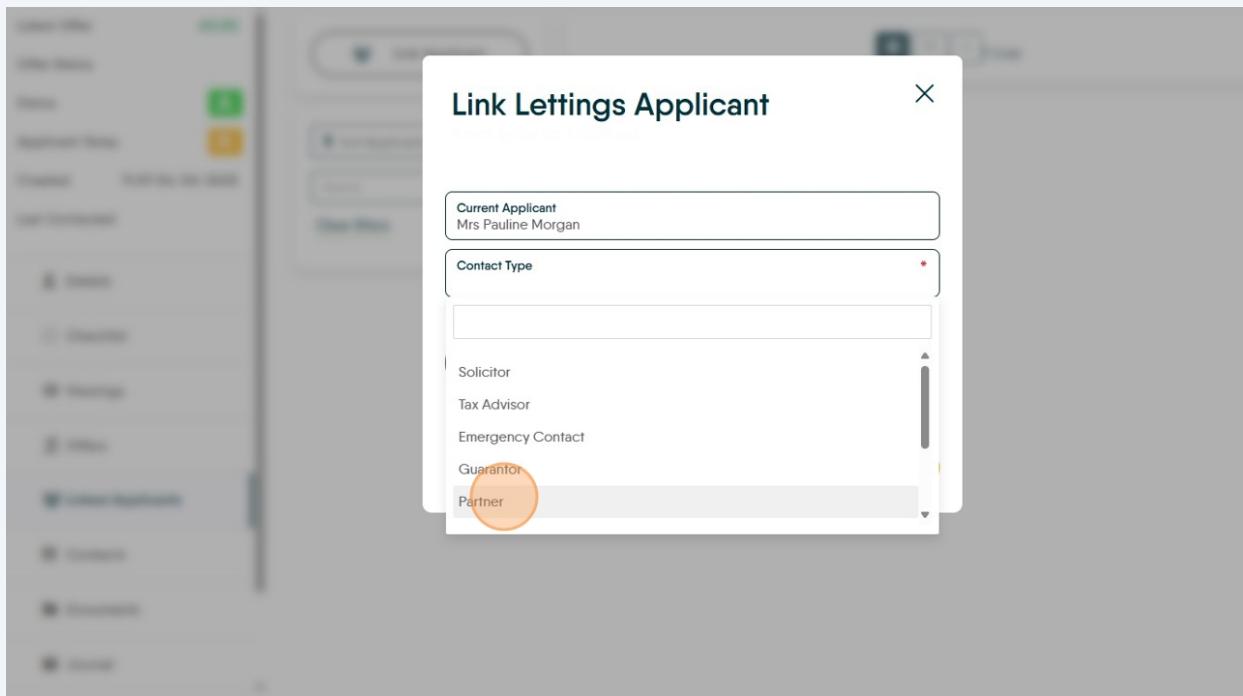
Alternative Communication Systems Acer Court, North...

View Applicant

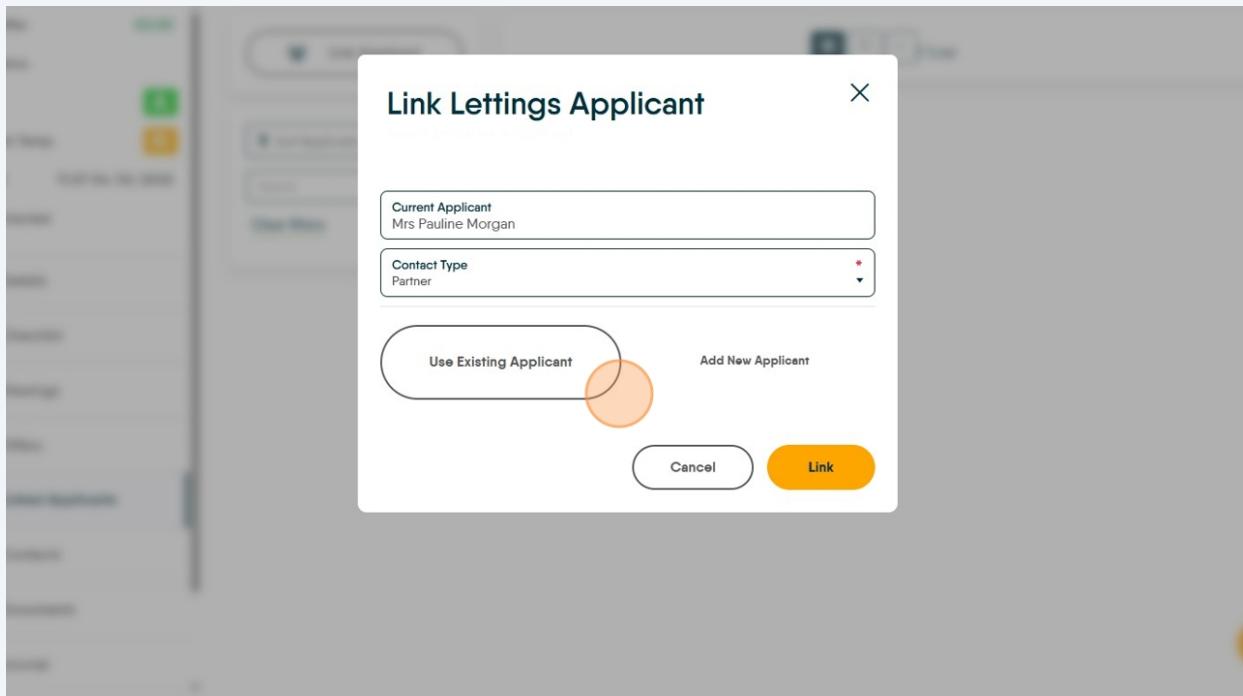
4 Click here and set the contact type.



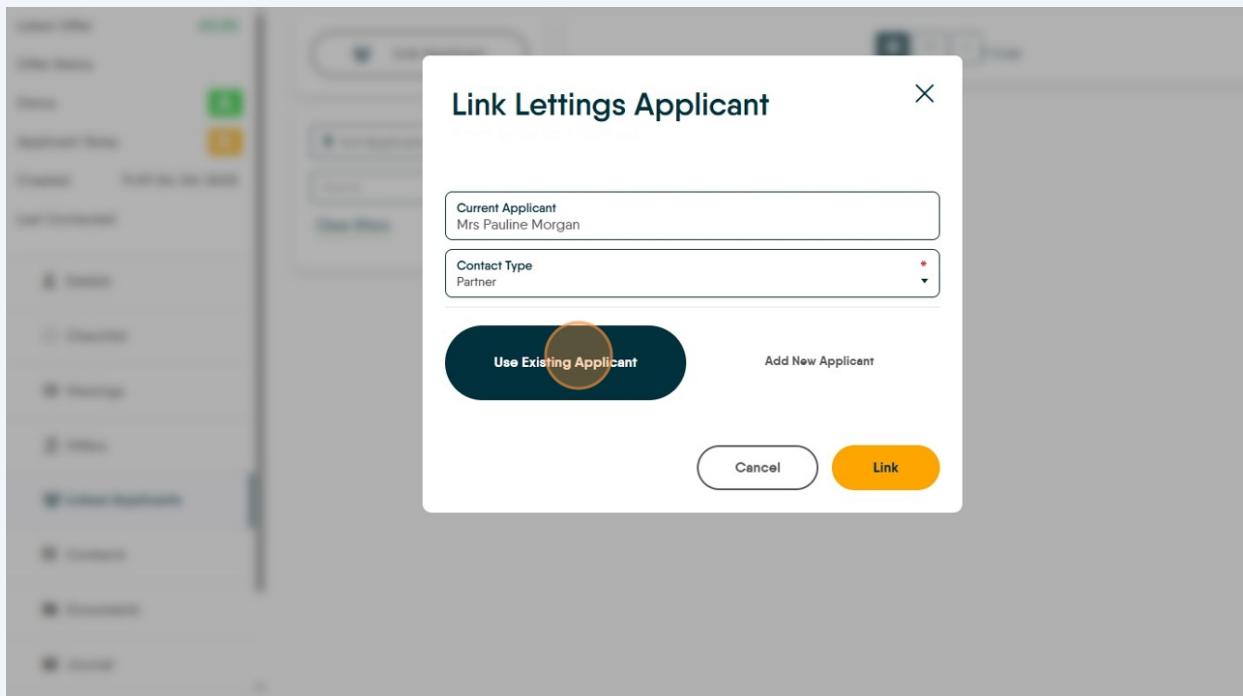
5 Click the contact type e.g. Partner



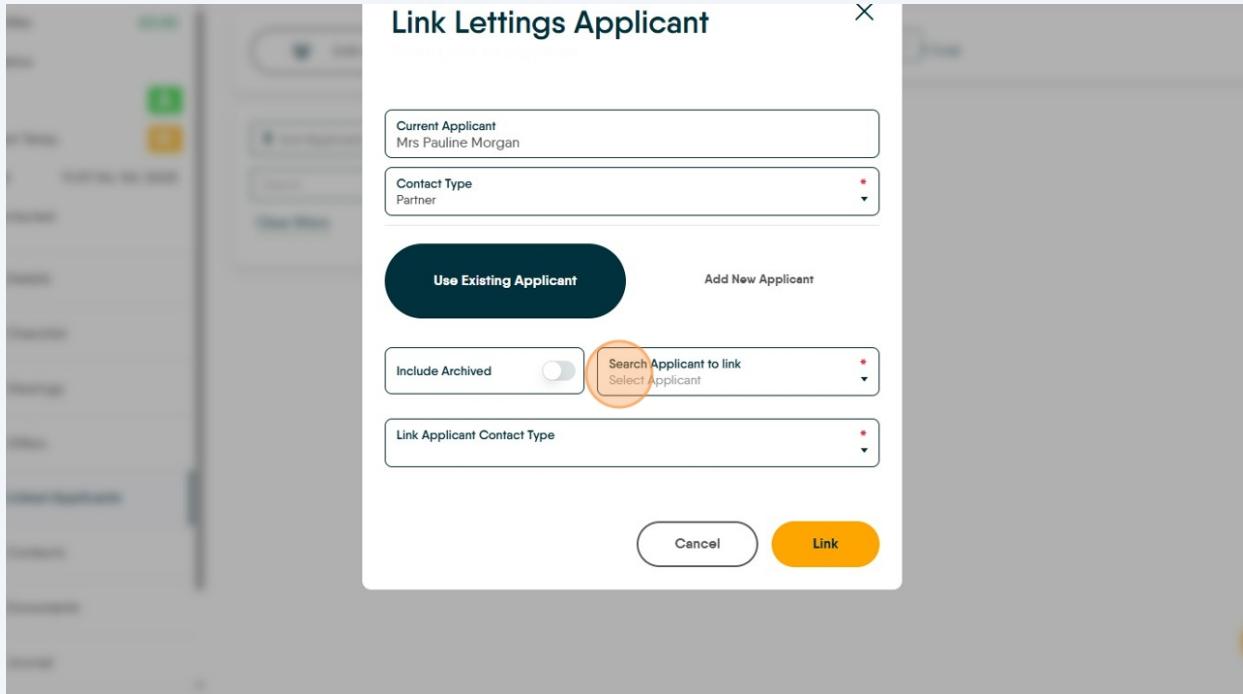
6 Then select whether you are adding an existing or new contact.



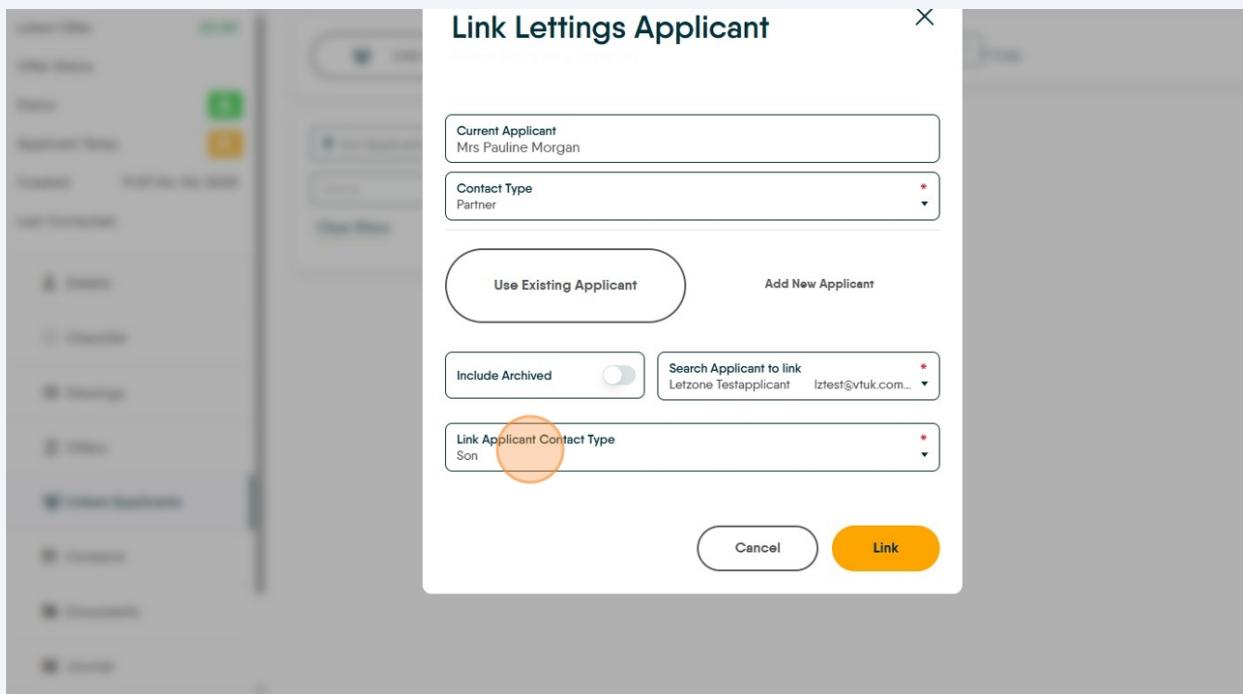
7 Click "Use Existing Applicant"

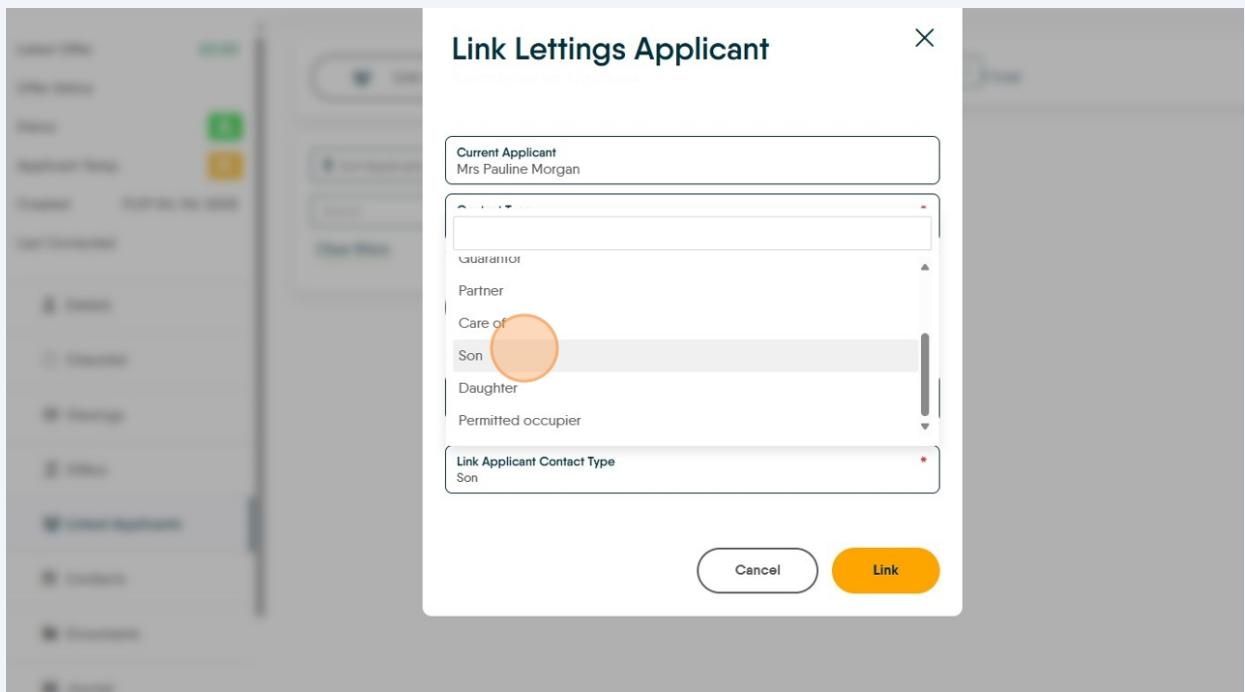


8 Click "Select Applicant" and search for the person you are linking and select from the list.

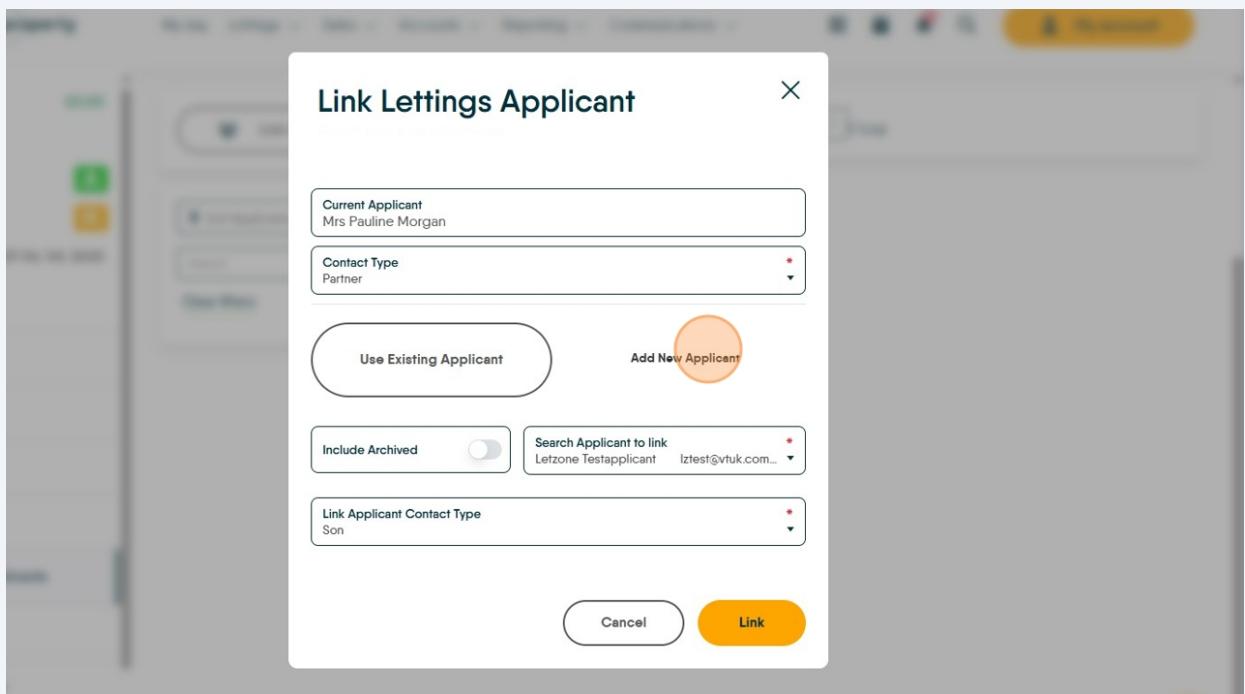


9 Click to select the type of contact you are linking e.g. "Son"
Click "Son"



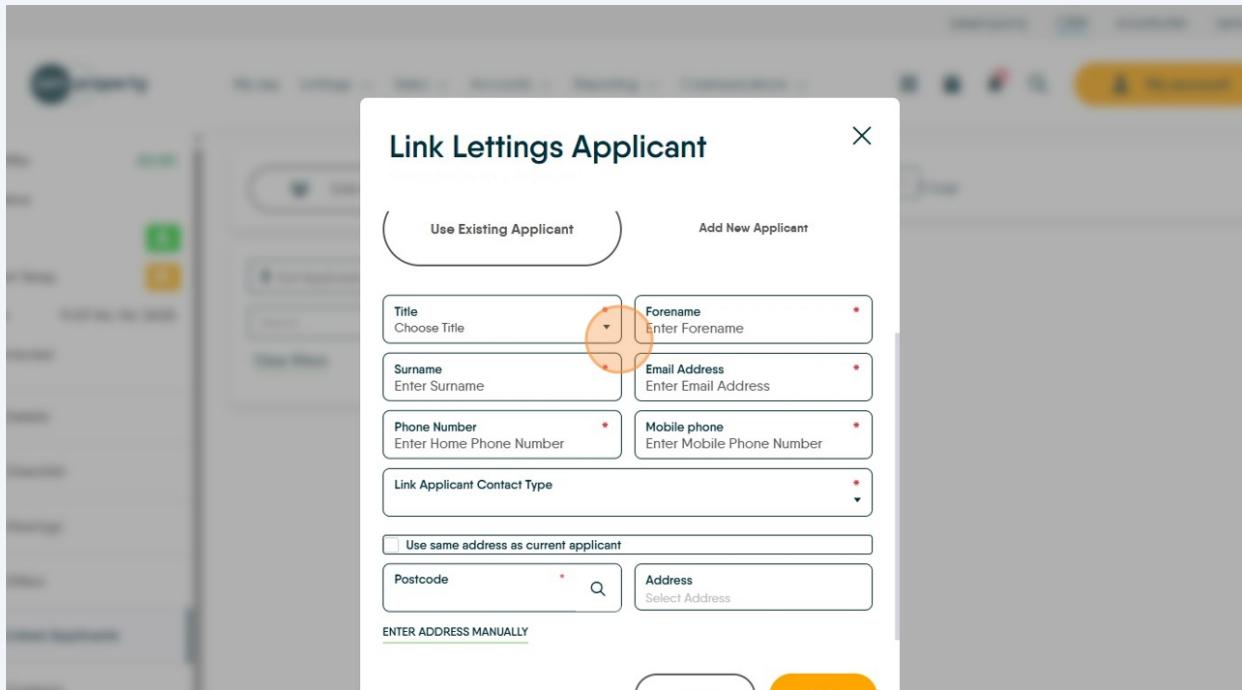


10 If you are adding a new applicant, click "Add New Applicant"



11

Click and complete all the required fields. If the current address of the new contact is the same as the contact you are linking them to, select the "Use same address..." option, otherwise add their postcode to the postcode checker.



12

Click "Link"

