

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 displays the 'iam property' CRM interface. On the left is a sidebar with navigation options: 'Offer' (showing £0.00), 'Status' (with green 'A' and orange 'H' icons), 'Rent Temp.' (showing 11:07 04/06/2025), 'Contacted', 'Details' (highlighted), 'Checklist', 'Viewings', 'Offers', 'Linked Applicants', 'Contacts', and 'Documents'. The main header includes navigation tabs: 'My day', 'Lettings', 'Sales', 'Accounts', 'Reporting', and 'Communications', along with a 'My account' button. The central area shows the profile for 'Pauline Morgan' (PM) with contact details 'pm@mo.tc' and '140044'. A red 'AP' badge, a 'Warning' icon, and a 'Set GDPR' button are visible. The address is 'Alternative Communication Systems Acer Court, North Leigh Business Park, North Leigh, Witney, Oxfordshire', with a 'Lettings' button. Below this is a form with fields for 'reference:', 'Negotiator: Training Dave', 'Branch: Morgan & Co', and 'Status: Active'. 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, Source, and Temperature (Hot). An 'Edit Manually' button is located at the bottom right of the 'Applicant Address' section.

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

Contacts

Documents

Journal

PM Pauline Morgan
pm@mo.tc
140044

AP Warning

Alternative Communication Systems Acer Court, North Leigh Business Park,
North Leigh, Witney, Oxfordshire | [Lettings](#)

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	Source	Temperature Hot

Applicant Address [Edit Me](#)

Postcode OX29 6SW	Address Alternative Communication Systems Acer Court, North Leigh Busi
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3 Click "Link Applicant"

iamproperty CRM movebutle

My day Lettings Sales Accounts Reporting Communications

iamproperty

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

Sort Applicants

Search

Clear filters

Partner

DM

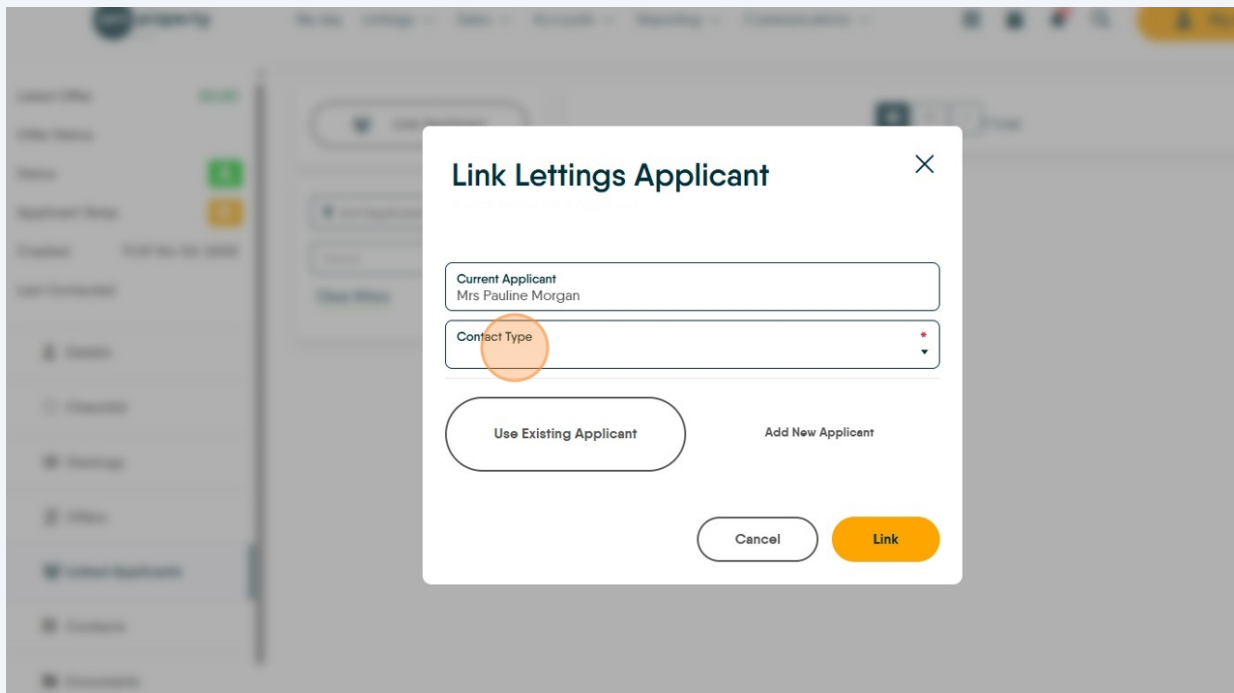
Mr david morgan
crm.training@iamproper...
07802200655

Alternative Communication
Systems Acer Court, North...

View Applicant

1 Total

- 4 Click here and set the contact type.



Link Lettings Applicant ✕

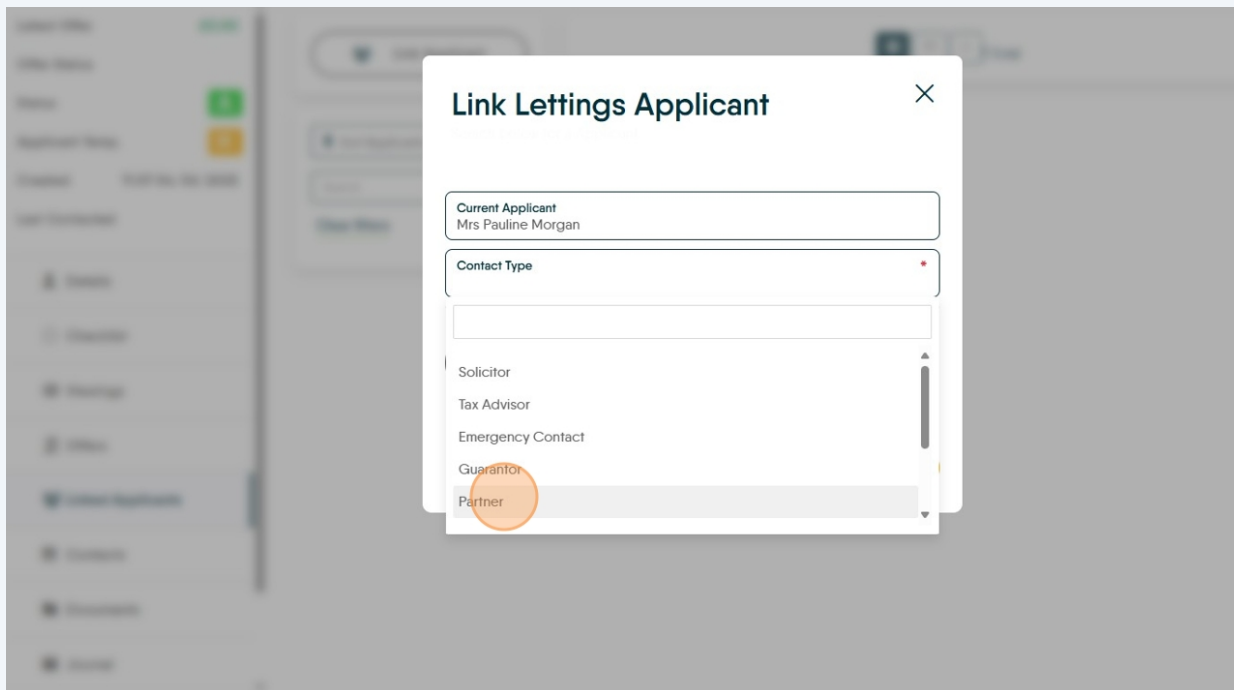
Current Applicant
Mrs Pauline Morgan

Contact Type

Use Existing Applicant Add New Applicant

Cancel Link

- 5 Click the contact type e.g. Partner



Link Lettings Applicant ✕

Current Applicant
Mrs Pauline Morgan

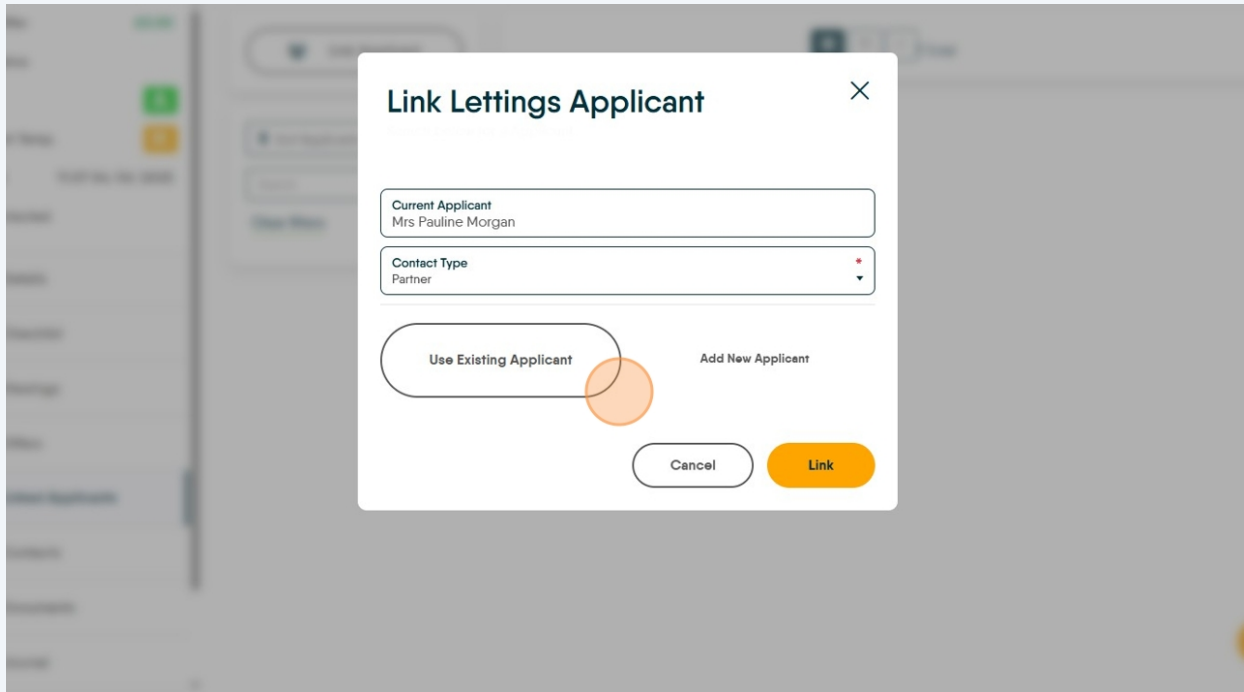
Contact Type

Solicitor
Tax Advisor
Emergency Contact
Guarantor
Partner

Use Existing Applicant Add New Applicant

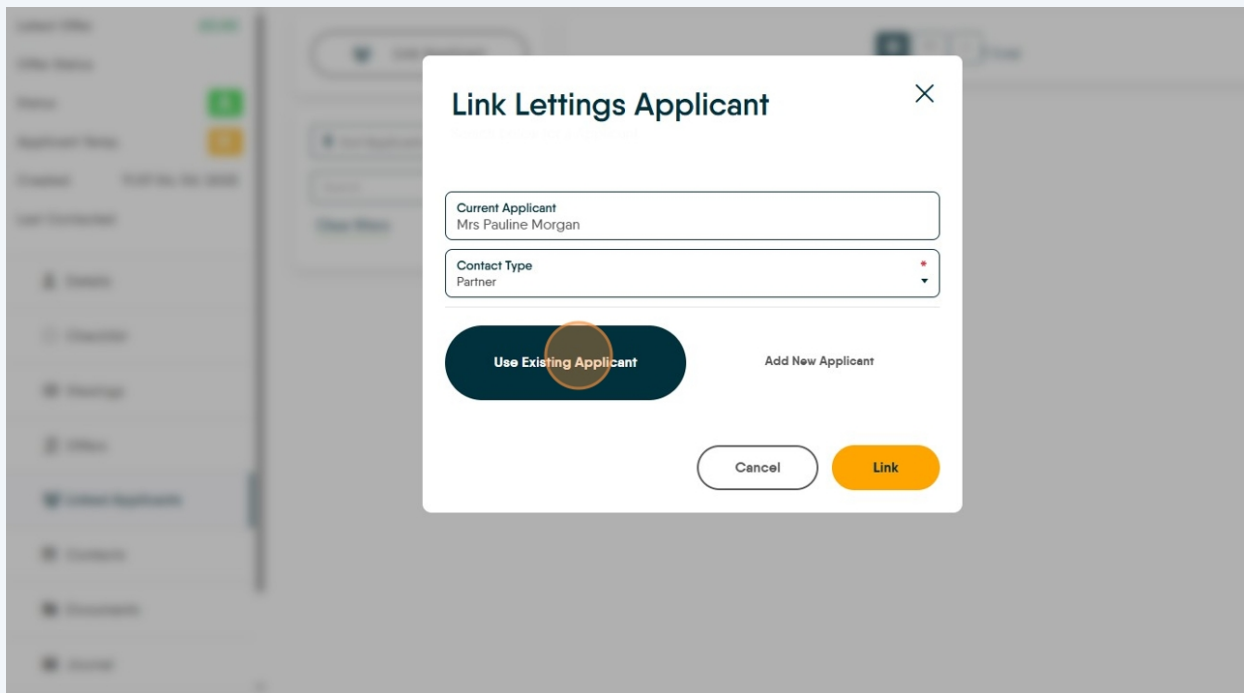
Cancel Link

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



The screenshot shows a modal dialog titled "Link Lettings Applicant" with a close button (X) in the top right corner. Inside the dialog, there are two input fields: "Current Applicant" containing "Mrs Pauline Morgan" and "Contact Type" with a dropdown menu showing "Partner". Below these fields are two buttons: "Use Existing Applicant" and "Add New Applicant". The "Use Existing Applicant" button is highlighted with an orange circle. At the bottom of the dialog are two buttons: "Cancel" and "Link".

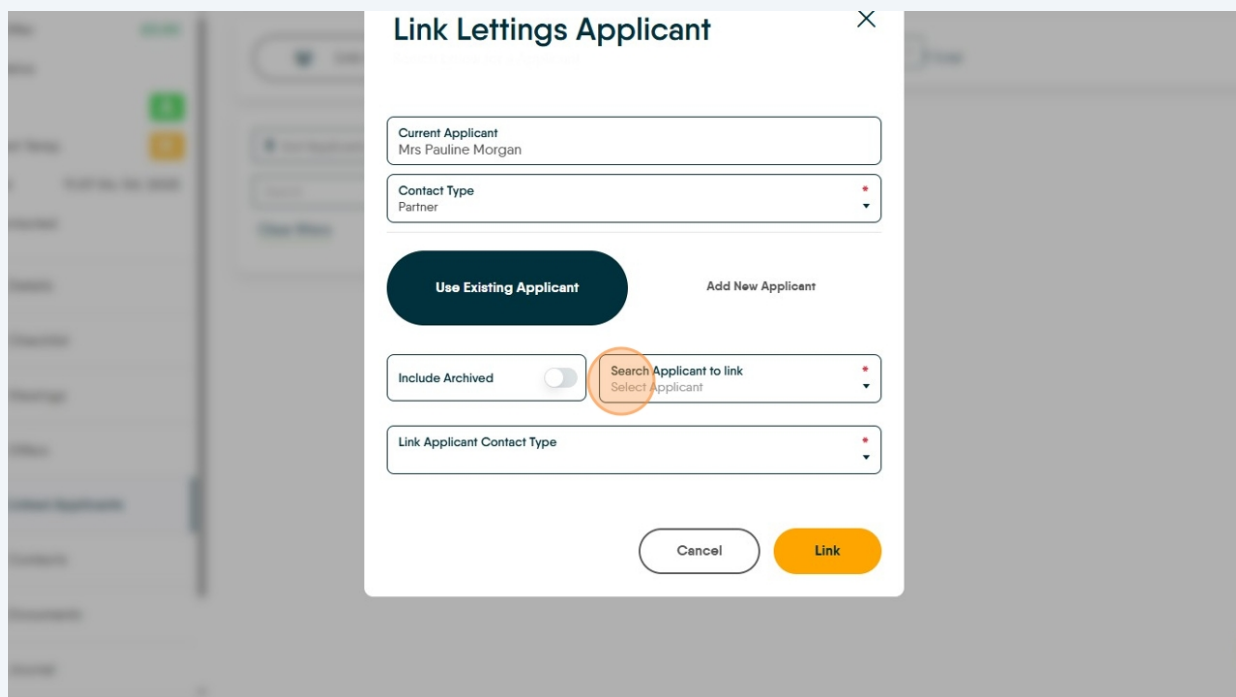
- 7 Click "Use Existing Applicant"



This screenshot is identical to the one above, showing the "Link Lettings Applicant" dialog box. However, in this step, the "Use Existing Applicant" button is highlighted with an orange circle, indicating it should be clicked.

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



Link Lettings Applicant [X]

Current Applicant
Mrs Pauline Morgan

Contact Type
Partner

Use Existing Applicant Add New Applicant

Include Archived ☐

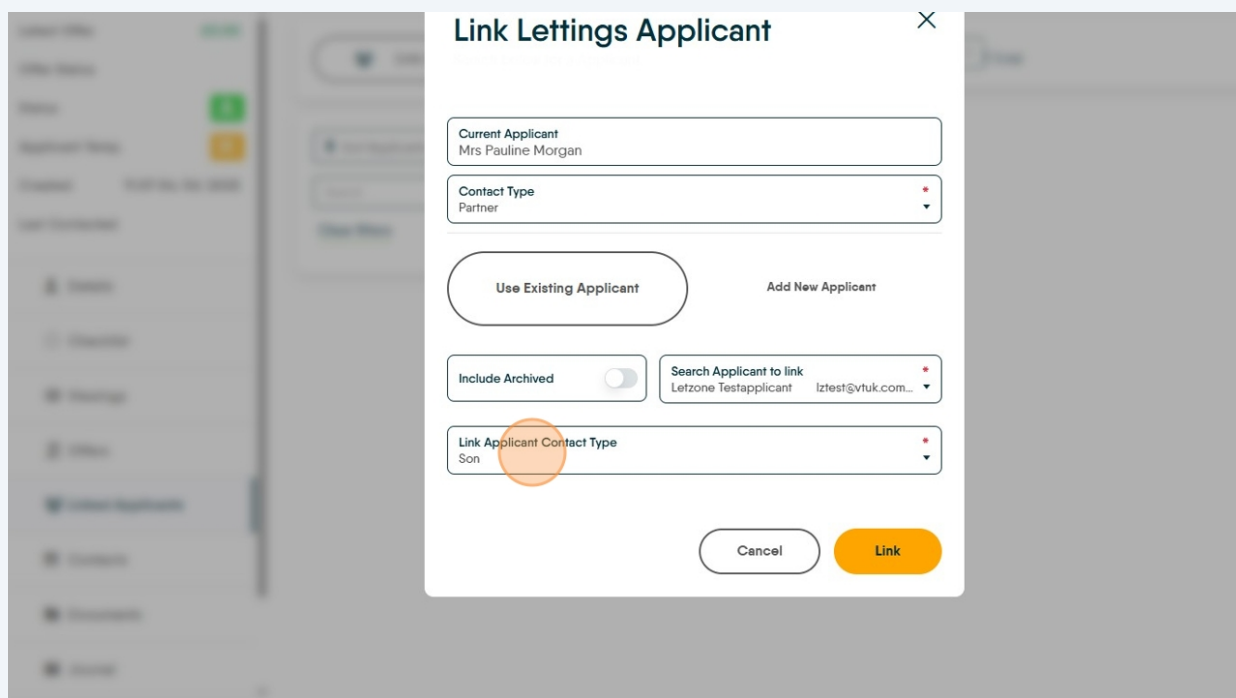
Search Applicant to link
Select Applicant

Link Applicant Contact Type

Cancel Link

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



Link Lettings Applicant [X]

Current Applicant
Mrs Pauline Morgan

Contact Type
Partner

Use Existing Applicant Add New Applicant

Include Archived ☐

Search Applicant to link
Letzone Testapplicant lztest@vtuk.com...

Link Applicant Contact Type
Son

Cancel Link

Link Lettings Applicant ✕

Current Applicant
Mrs Pauline Morgan

Link Applicant Contact Type
Son

Cancel Link

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

Link Lettings Applicant ✕

Current Applicant
Mrs Pauline Morgan

Contact Type
Partner

Use Existing Applicant Add New Applicant

Include Archived ☐

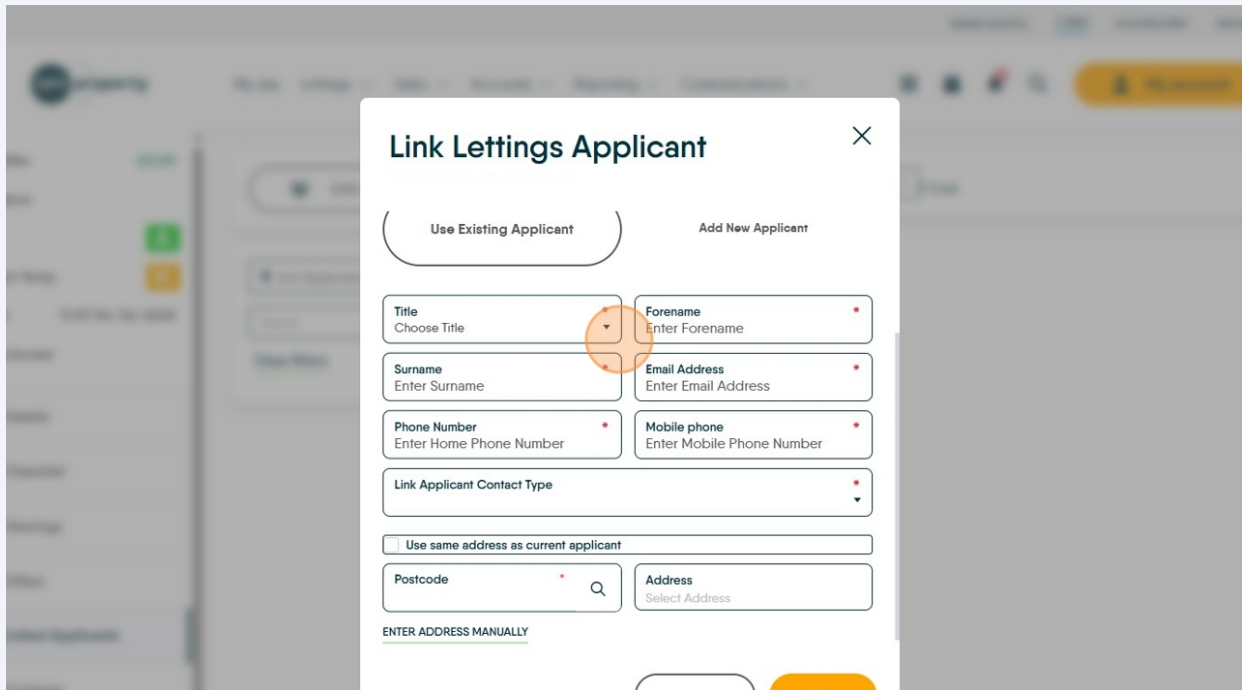
Search Applicant to link
Letzone Testapplicant lztest@vtuk.com...

Link Applicant Contact Type
Son

Cancel Link

11

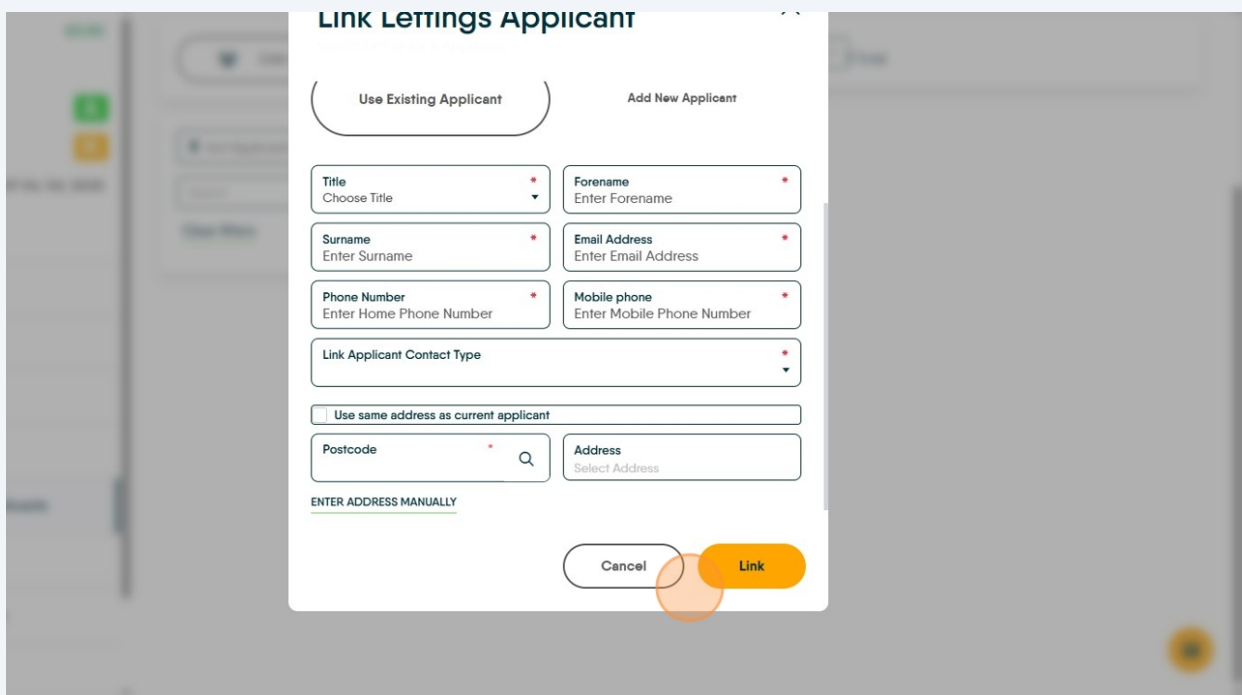
Click and complete all the required fields. If the current address of the new contact is the same as the contact you are linking them to, select the "Use same address..." option, otherwise add their postcode to the postcode checker.



The screenshot shows the 'Link Lettings Applicant' modal form. At the top, there are two tabs: 'Use Existing Applicant' (selected) and 'Add New Applicant'. Below the tabs are several input fields: 'Title' (a dropdown menu with 'Choose Title' selected, highlighted by an orange circle), 'Forename', 'Surname', 'Email Address', 'Phone Number', 'Mobile phone', and 'Link Applicant Contact Type'. Below these fields is a checkbox labeled 'Use same address as current applicant'. Underneath the checkbox are two more fields: 'Postcode' (with a search icon) and 'Address' (with the text 'Select Address'). At the bottom of the form, there is a link that says 'ENTER ADDRESS MANUALLY'. At the very bottom of the modal, there are two buttons: 'Cancel' and 'Link'.

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Click "Link"



This screenshot shows the same 'Link Lettings Applicant' modal form as in the previous step. In this view, an orange circle highlights the 'Link' button at the bottom right of the modal. The 'Title' dropdown menu is no longer highlighted. All other elements of the form remain the same.