

# Adding a New Applicant in CRM



This guide provides a step-by-step process for efficiently adding a new lettings applicant to the CRM system, ensuring that all necessary details are captured accurately. By following these instructions, users can streamline their workflow, minimise errors, and enhance their data management practices. It is particularly beneficial for property management professionals looking to maintain organised records of applicants and tenants. Overall, this guide simplifies the process of referencing.



**Alert!** When creating an applicant record for a tenancy where there are 2 joint applicants, it is best practice to add them as 2 separate records and then link the 2 records.

This allows checking of documents and referencing to be done easily and quickly from within the CRM and Letzone, credit checks using 'Vision+' can also be done without needing to re key data.

For a sales record linking records (rather than one Mr&Mrs record) allows movebutler to quickly gather the applicant information to run the compliance checks with less re keying of data.

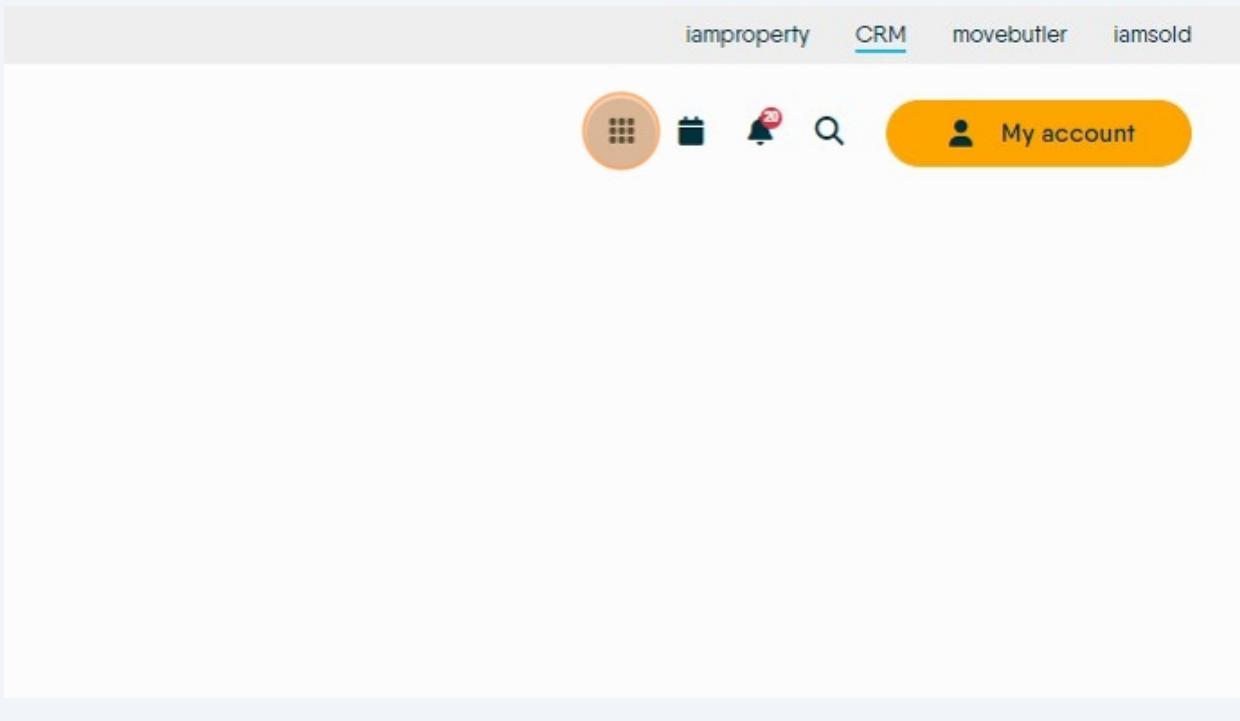
1

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

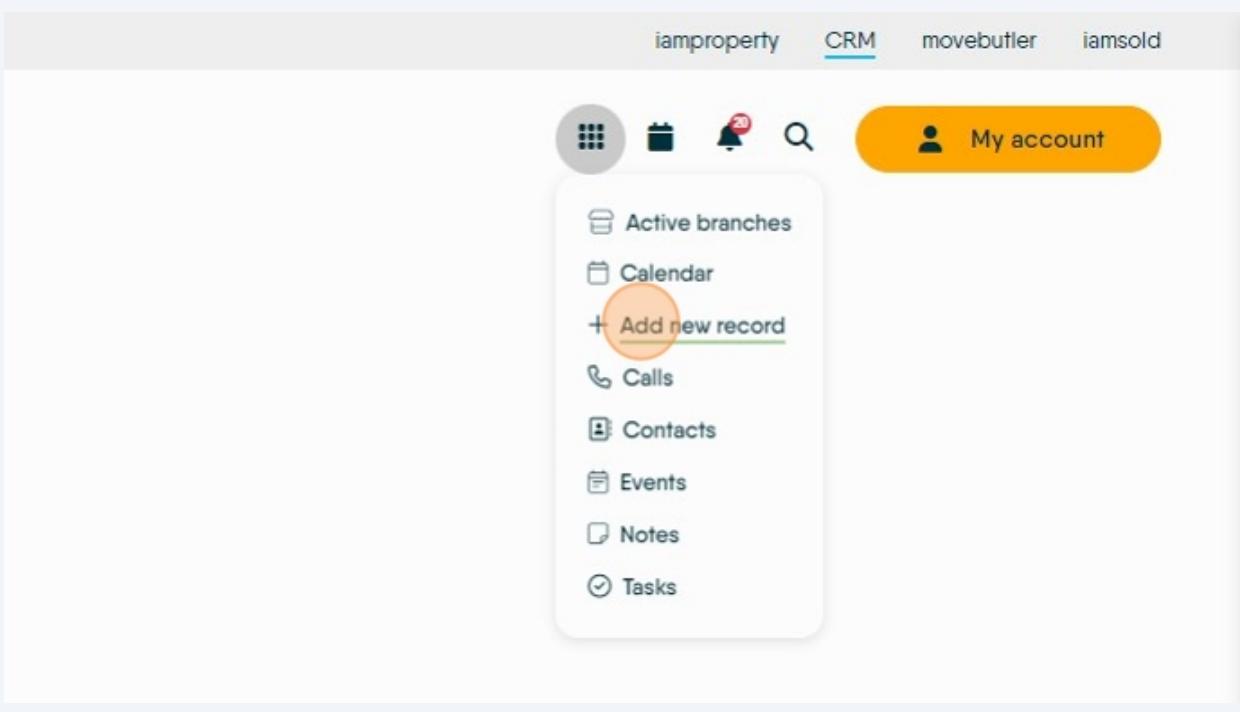


**Tip!** You can perform this process from anywhere within the CRM, the menu icon (aka bento menu) is available from any page in the CRM system.

2 Click the "menu" icon (n.b. this icon is often known as a 'Bento' menu)



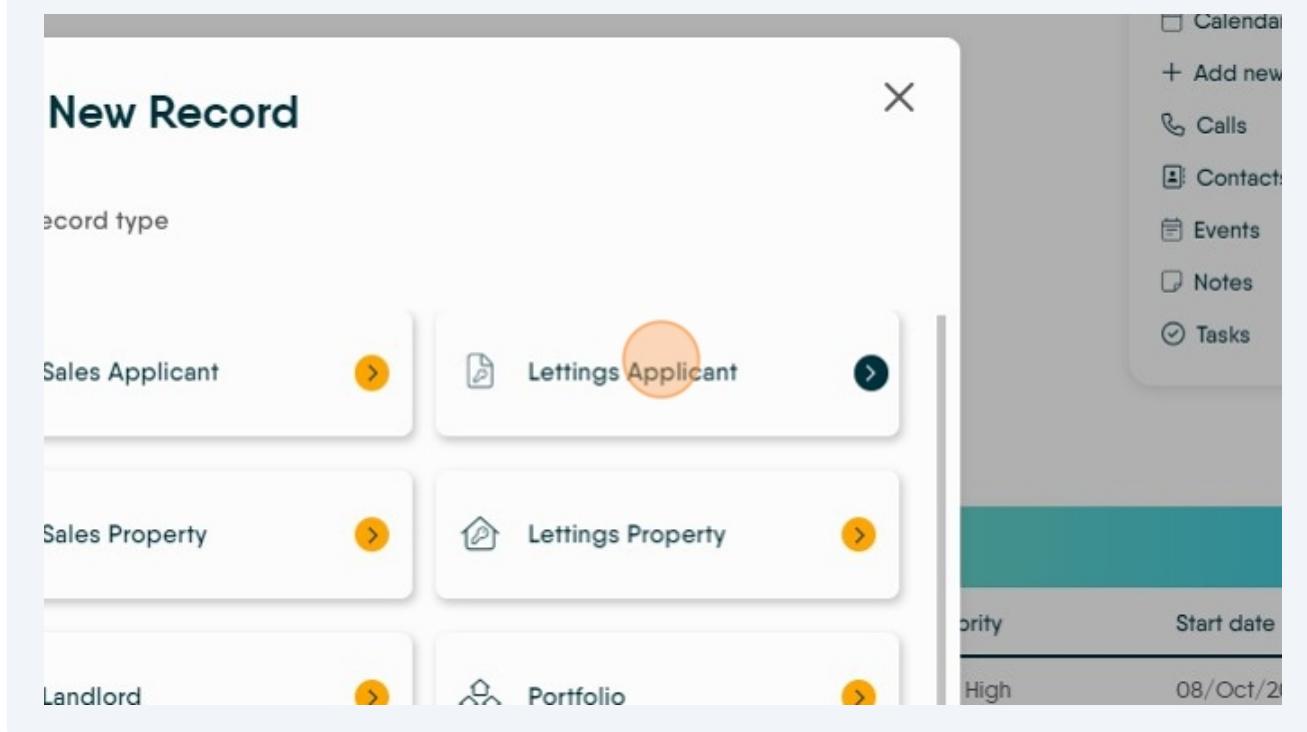
3 From the dropdown menu Click "Add new record"





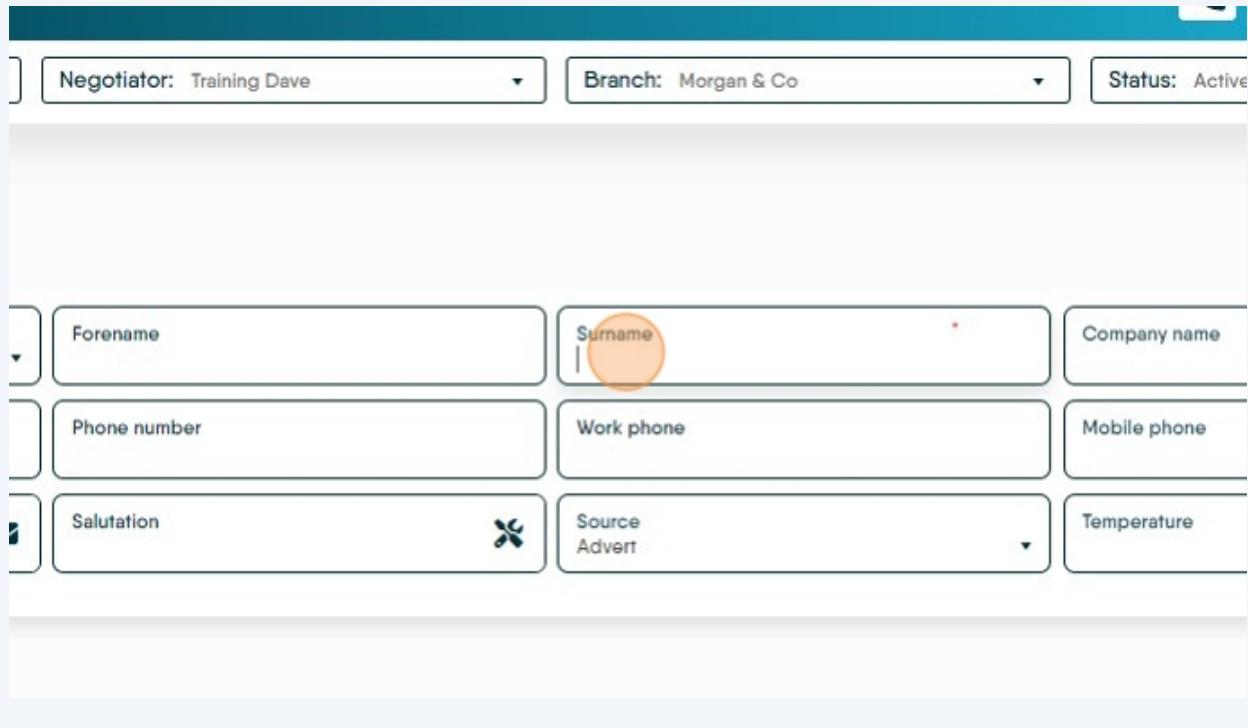
Tip! This process is the same if you are creating a Sales Applicant or a Lettings Applicant. Here we are using a Lettings Applicant.

- 4 Click "Lettings Applicant"



Tip! If you press and hold the 'Ctrl' key on your keyboard as you click onto the Lettings Applicant option (or other option) the screen will open a in a new tab and you wont lose where you are in the CRM.

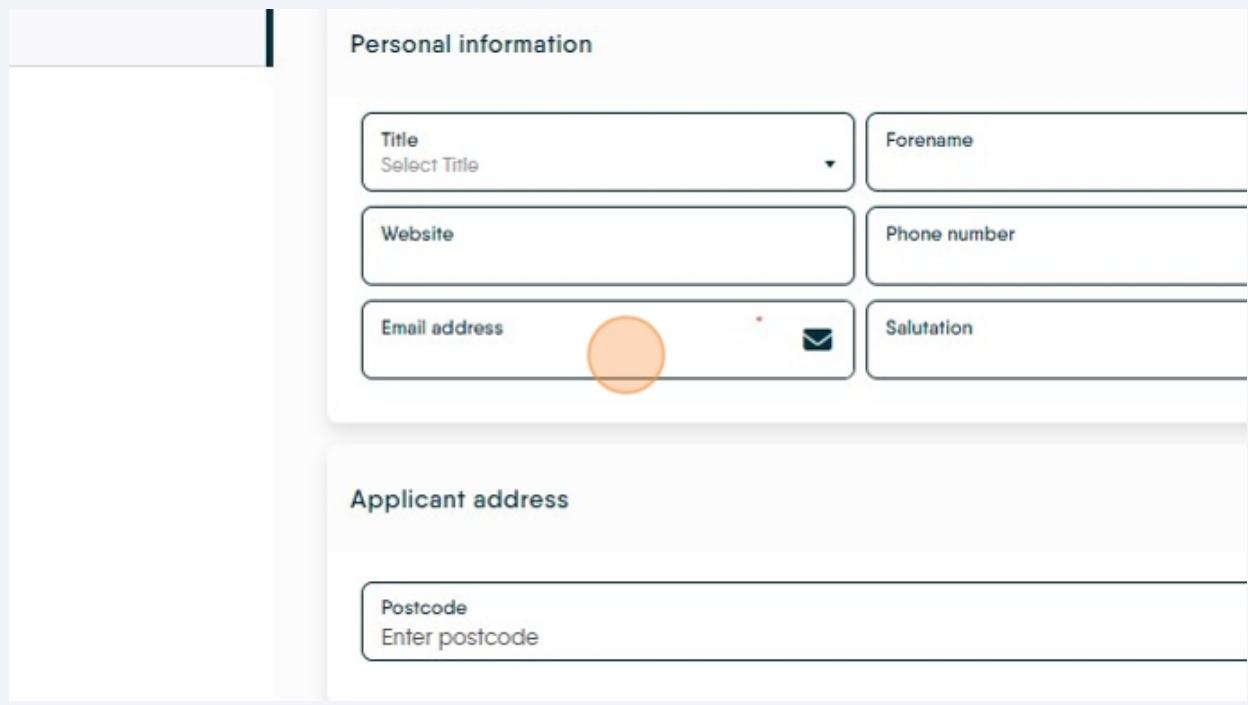
5 Click the "Surname" field. Add in the contact details for your Applicant. The minimum you need to add is the Surname and an email address.



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

|              |                  |              |
|--------------|------------------|--------------|
| Forename     | Surname          | Company name |
| Phone number | Work phone       | Mobile phone |
| Salutation   | Source<br>Advert | Temperature  |

6 Click the "Email Address" field. If the email address has been used before (in either a Live or Archived record) a warning message will show and allow you to use or merge the original data, saving the duplication of entries and work.



Personal information

|                       |              |
|-----------------------|--------------|
| Title<br>Select Title | Forename     |
| Website               | Phone number |
| Email address         | Salutation   |

Applicant address

|                            |
|----------------------------|
| Postcode<br>Enter postcode |
|----------------------------|



**Tip! For Lettings.** If you are using Letzone to manage the Pre Booked process, you can save the record here. Navigate to Letzone, create the Tenancy and send the Letzone welcome message from Letzone. The applicant will be able to update all of their own personal data from within the Letzone portal screen.

If not using Letzone or this is a Sales Applicant, continue on.

7

Complete the remaining Applicant information.

The screenshot shows a CRM application interface for managing applicants. On the left, there is a sidebar with tabs for 'Temp.', 'Selected', and 'Details'. The main area is titled 'Personal information'. It contains several input fields: 'Title' (with a dropdown menu showing 'Select Title' and a circled orange highlight), 'Forename' (empty), 'Website' (empty), 'Phone number' (empty), 'Email address' (containing 'crm.training@iamproperty.com' with a small envelope icon), and 'Salutation' (empty). Below this section, there is a header for 'Applicant address'.

## 8 Add Title

The screenshot shows a software interface for entering personal information. On the left, a sidebar has a 'Details' tab selected. The main area is titled 'Personal information'. It contains several input fields: a dropdown for 'Title' with options 'Mr', 'Miss', 'Mrs', and 'Ms', where 'Mr' is highlighted with an orange circle; a text field for 'Forename'; a text field for 'Phone number'; a text field for 'Salutation'; and a text field for 'Postcode' with the placeholder 'Enter postcode'.

## 9 Add the applicant Forename.

**Add Phone Numbers.** If the Applicant only has a mobile phone number, add it to the Phone Number field as well as the Mobile number field.

*Tip! use **ctrl+c** to copy the number from one field and **ctrl+v** to paste to another*

Adding a Mobile number into here allows SMS messages to be sent to the Applicant.

Click on the tools icon to create the Salutation, this will show the Applicants title and Surname (e.g. Mr Emery). It is good practice to create this field.

n.b. If this step is not done and you use the 'Salutation' template tag in a SMS or email template, when sent there will be an empty space in your message.

Reference:

Negotiator: Training Dave

Branch: Morgan &

### Personal information

|   |   |                  |
|---|---|------------------|
| Title<br>Mr   | Forename<br><input type="text"/>  | Surname<br>Emery |
| Website   | Phone number<br><input type="text"/>  | Work phone       |
| Email address<br>crm.training@iamproperty.com  | Salutation<br> | Source<br>Advert |

### Applicant address

n

|  |   |                  |
|--|---|------------------|
| <input type="text"/>   | Forename<br>Steven  | Surname<br>Emery |
| <input type="text"/>   | Phone number<br><input type="text"/>  | Work phone       |
| property.com  | Salutation<br> | Source<br>Advert |

Import

|                  |              |
|------------------|--------------|
| Surname<br>Emery | Company name |
| Work phone       | Mobile phone |
| Source<br>Advert | Temperature  |

Edit manually

|                              |                  |           |
|------------------------------|------------------|-----------|
| Forename<br>Steven           | Surname<br>Emery | Col       |
| Phone number<br>078546336699 | Work phone       | Mo<br>078 |
| Salutation                   | Source<br>Advert | Ter       |

Build Salutation

Address

10 Click the "Enter postcode" field, add the Postcode for the Applicants current address.

The screenshot shows a CRM application interface. At the top, there is a header with a logo and the text 'CRM TRAINING'. Below the header, there are sections for 'Email address' (crm.training@iamproperty.com) and 'Salutation' (Mr Emery). The main area is titled 'Applicant address' and contains a 'Postcode' field with the placeholder 'Enter postcode'. This field is highlighted with a red circle. To the left of the main area, there are other sections: '£0.00' (under 'Fees'), 'Email address' (under 'Contact'), 'Salutation' (under 'Contact'), 'Applicant address' (under 'Address'), 'Contact notes' (under 'Notes'), and 'Actions' (under 'Actions').

11 Click here to search for the Property details

Select the Property from the list.

If the Property doesn't show, select the closest address match and then use the 'Edit Manually' option to update the information. Click "Edit manually"

Salutation  
Mr Emery

Source  
Advert

Temp

Address

Address  
-- Select Address --

71 Pelaw Crescent, Chester le Street, County Durham, DH22HX, UK

72 Pelaw Crescent, Chester le Street, County Durham, DH22HX, UK

73 Pelaw Crescent, Chester le Street, County Durham, DH22HX, UK

74 Pelaw Crescent, Chester le Street, County Durham, DH22HX, UK

75 Pelaw Crescent, Chester le Street, County Durham, DH22HY 1UK

[Edit manually](#)

Source Advert

Temperature

Address  
78 Pelaw Crescent, Chester le Street, County Durham, DH22HX, UK

Edit manually

Latest Offer £0.00

Offer Status

Status

Applicant Temp.

Last Contacted 01/01/0001 00:00

Details

Applicant address

Postcode dh2 2hx

Address 78 Pelaw Crescent, Chester le Street, County Durham, DH22HX, UK

House 78

Town Chester le Street

County County Durham

Country UK

Contact notes

Type Contact Notes here...

Applicant criteria

Search for Area...

1/4 Mile

Add Area B

12

Contact Notes, this box can be used to take a record of any contact request the Applicant has made. Possibly they work nights, or can only be contacted by mobile phone etc.

The screenshot shows a software interface for managing property applications. At the top, there are fields for 'Move In Date' (01/01/0001 00:00), 'Address' (Chester le Street), and 'County' (County Durf). Below these, a section titled 'Contact notes' contains a text input field with a placeholder 'Type Contact Notes here...'. Above the input field are four small icons: a blue square with a white 'B', a blue square with a white 'I', a blue square with a white 'U', and a blue square with a white cross. The text input field is highlighted with an orange circle. At the bottom of the interface, there is a section titled 'Applicant criteria'.

13

Next add the Applicant Criteria. This criteria supports the accurate matching of properties to applicants and vice versa.

Click the "Search for Area..." field and add in the specific areas that the Applicant is looking to live in. This can be a for example a Town, Postcode, or Street Name. Then set a radius around that area that you want to search within. For example, click "1/4 Mile" to search an area of up to a quarter of a mile outside of the area specified.

FYI if a town/city is used, the radius is of the postal area of that town, in the example here an area up to a quarter of a mile outside the postal area of Witney will be searched

Click "Add Area" to set the search area.

Set the price range your applicant is looking for.

Click the "Move In Date" field to set a target date to move in. (if required)

The 'Property...' and other criteria areas are customisable to your requirements in the configuration menu. These all help with matching your applicant to the properties on your database. The more accurate the information (on both property and applicant) the better the matches are going to be.

Offer £0.00

Issue

at Temp.

Contacted 01/01/0001 00:00

Details

## Applicant criteria

Search for Area...

Min Price £0

Max Price £0

Move in date  
10/10/2024

Communications ▾



1/4 Mile

 Max Price £0

1/4 Mile

1/2 Mile

1 Mile

3 Miles

5 Miles

Minimum Bathroo

The screenshot shows a user interface for a property search application. At the top, there are several icons: a grid, a briefcase, a person with a red notification badge, a magnifying glass, and a yellow 'My account' button. Below this, a search bar contains the text '1/2 Mile' with a dropdown arrow, and a teal button with a location pin icon and the text 'Add Area'. To the right is a vertical scroll bar.

Under the search bar are two input fields for 'Minimum Bedrooms' and 'Minimum Bathrooms', both set to '0'. Below these are two large, empty rectangular search fields. The first search field has a placeholder 'Search for Area...' and a '1/4' indicator in the top right. The second search field has a placeholder 'Search for Area...' and a 'Min' indicator in the top right.

On the left side of the interface, there are several empty input fields and dropdown menus. One dropdown menu is set to '01/01/0001 00:00'. Below these is a search field with a placeholder 'Search for Area...' and a 'x' button, followed by a '1/4' indicator.

The main search area includes a 'Move in date' field set to '10/10/2024'. To the right, there are two sections: 'Property Attributes' and 'Property Type'. The 'Property Attributes' section contains 'Pets Allowed' and 'Furnished' toggle switches. The 'Property Type' section contains a 'Search Property Type' input field and a 'Apartment' selection.

Last Contacted 01/01/0001 00:00

**Details**

Min Price £ 500 Max Price

Move in date 10/10/2024

Property Attributes

Pets Allowed

Furnished

Part Furnished

Witney, UK - 1/2 Mile

Min Price £ 500 Max Price £ 750

Minimum Bedrooms 2 Minimum Bathrooms 2

Move in date 18/10/2024

Property Attributes

Pets Allowed

Furnished

Part Furnished

Unfurnished

Court of Protection

Property Type

Search Property Type

Apartment

Bar / Nightclub

Barn

Barn Conversion

Property Age

Search Property Age

Period

Pre-war

Post-war

Modern

Property Style

Search Property Style

30's Semi

Addison Homes

Georgian

Other Criteria

Garden

Parking

Single Garage

Double Garage

**14** Click "Additional Information" to add any further information you want to add about the applicant requirements.

If you are using Core Process Simplification to add an applicant and create a viewing this is where the details in the additional information field will show.



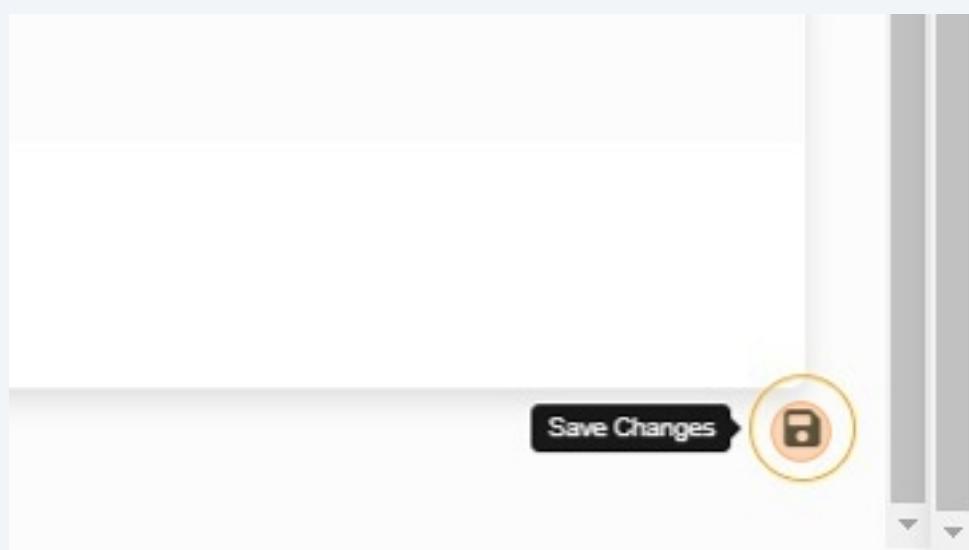
Additional information

Type Additional Information here...

**B** **I** **U** **del**

User defined fields

**15** Remember to Save your entries. Best practice is to save after each section.



Save Changes

lock icon



Tip! This is the basic Applicant Record created, for either Sales or Lettings applicants. The following options is dependent on settings that you have set for your agency, based on decisions that you have made.

16

Once saved there will be a range of other options appear on the left side of the screen.

The screenshot shows the AgentApp software interface. At the top, there is a header with a profile picture (DM), an email address (morgan@morgant.tc), and a phone number (07885464639). Below the header, the address '5 Milbank Crescent, Darlington, County Durham' and the 'Lettings' tab are visible. The main content area displays an applicant record for an offer status of 'Pending'. On the left, a sidebar lists several tabs: 'Details' (selected), 'Checklist', 'Viewings', 'Offers', 'Linked Applicants', and 'Contacts'. A large orange circle highlights the 'Details' tab. A modal window titled 'Personal information' is open, containing fields for 'Title' (dropdown menu with 'Select Title'), 'Forename' (text input with 'David'), 'Website' (text input), 'Phone number' (text input with '0'), 'Email address' (text input with 'morgan@morgant.tc' and an envelope icon), and 'Salutation' (text input). Below the modal, the 'Applicant address' section is partially visible.

17

Click "Checklist". Checklists allow you to create an electronic version of a checklist that you use to check that processes are being followed.

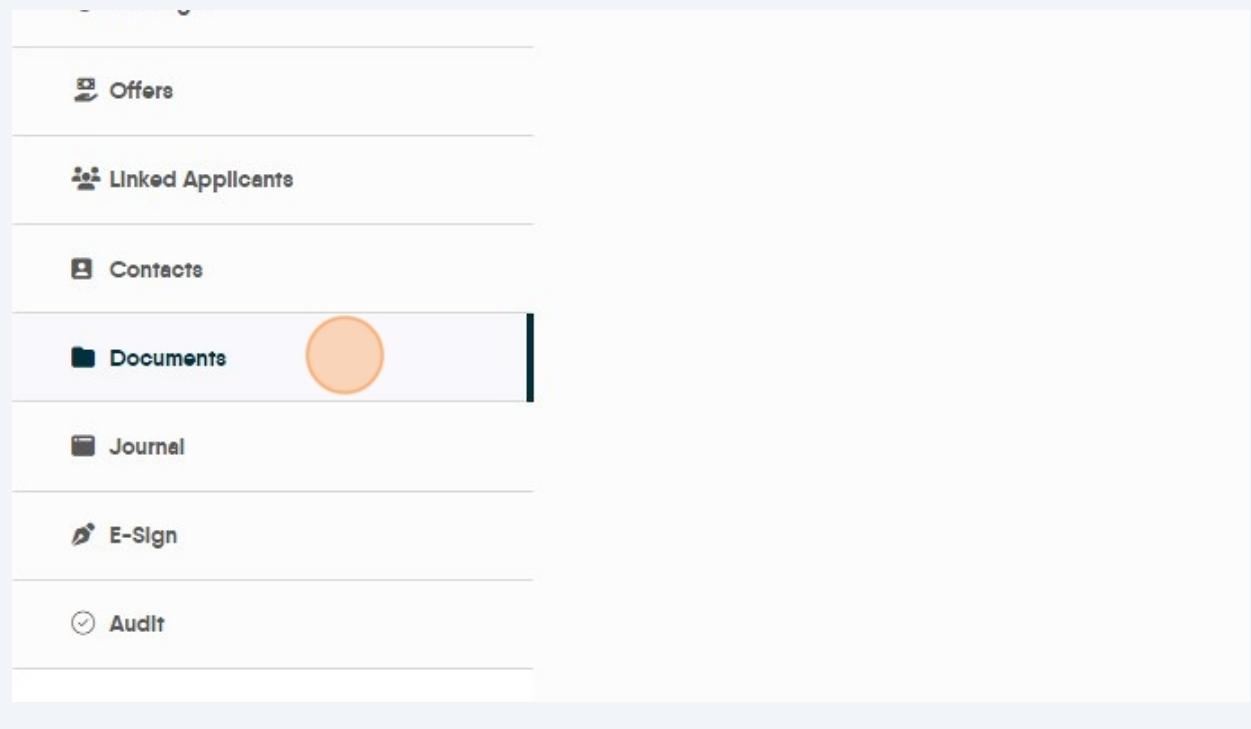
The screenshot shows a property record for '788 Pelaw Crescent, Chester le Street, Cou'. The record includes fields for Status (A), Applicant Temp. (H), Last Contacted, Reference, and Negotiator. On the left, there's a sidebar with sections for Details, Checklist (circled in orange), Viewings, Offers, and Linked Applicants. The Checklist section contains a list of items with checkboxes. A modal window titled 'Personal information' is open, showing fields for Title (Mr), Forename (Steven), Website, Phone number (07854633), Email address (crm.training@iamproperty.com, with a red asterisk and a mail icon), and Salutation (Mr Emery).

18

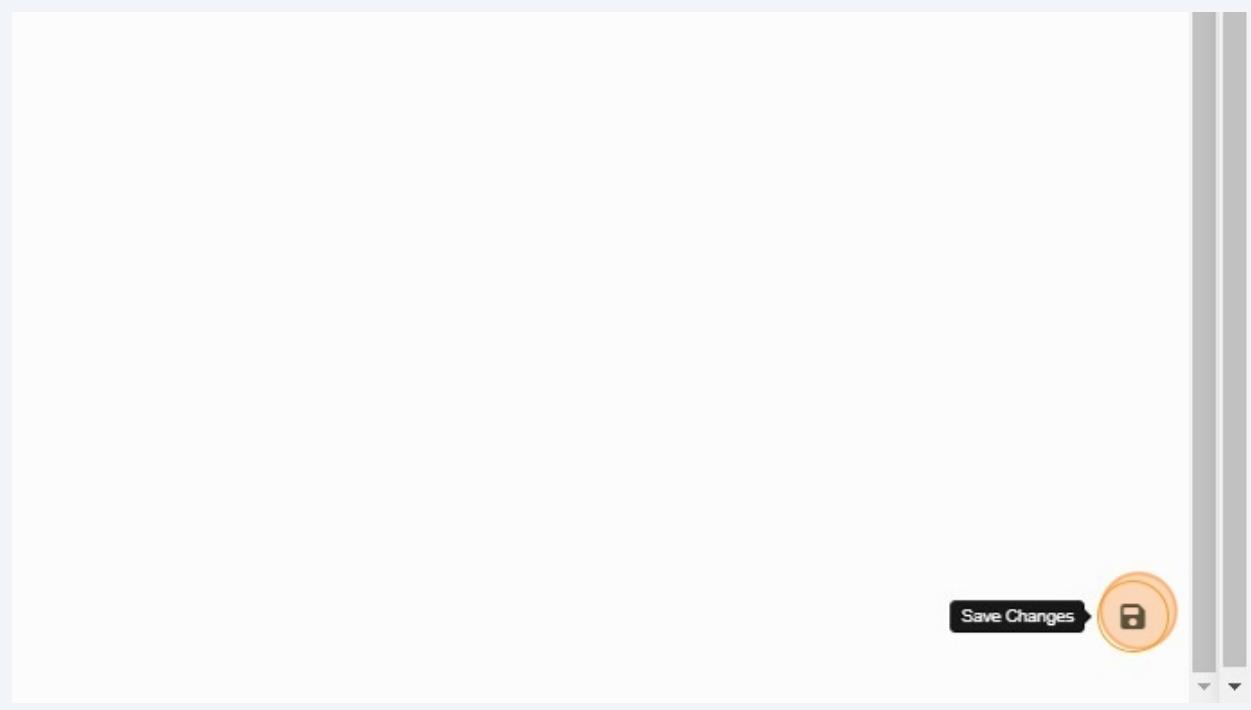
There can be multiple checklists per record. The items in a checklist can be 'ticked off' and a note of the date/time and the name of the person that completed that check is recorded. Notes and Completion dates can also be added, if a completion date is added, the checklist will also show on the appropriate dashboard.

The screenshot shows a checklist for 'New applicant setup' with 6 items. The items are: 'Property Details Required Captured' (unchecked), 'Contact Details Confirmed' (unchecked), 'New option' (unchecked), 'Evidence Provided and Logged' (unchecked), 'Information Checked and Verified' (unchecked), and 'Are they nice people' (unchecked). Each item has a 'Completed' button (with a checkmark and a file icon) to its right. The status bar at the bottom shows '0 of 6 checked'. Below this, there's a section for a 'New checklist' with a note '0 of 1 checked'.

**19** "Documents" is where all documents that relate to that record can be added.



**20** Don't forget to save as you go!

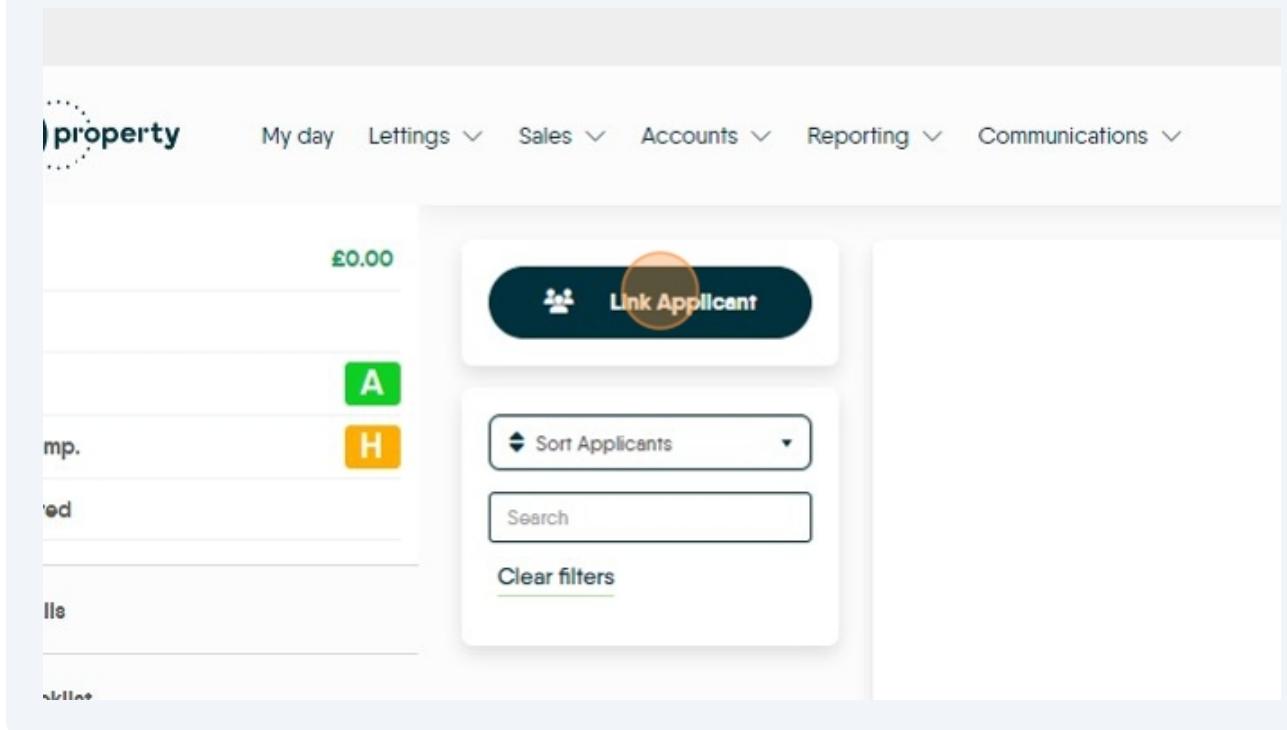


**21** Complete all of the other screens as required.

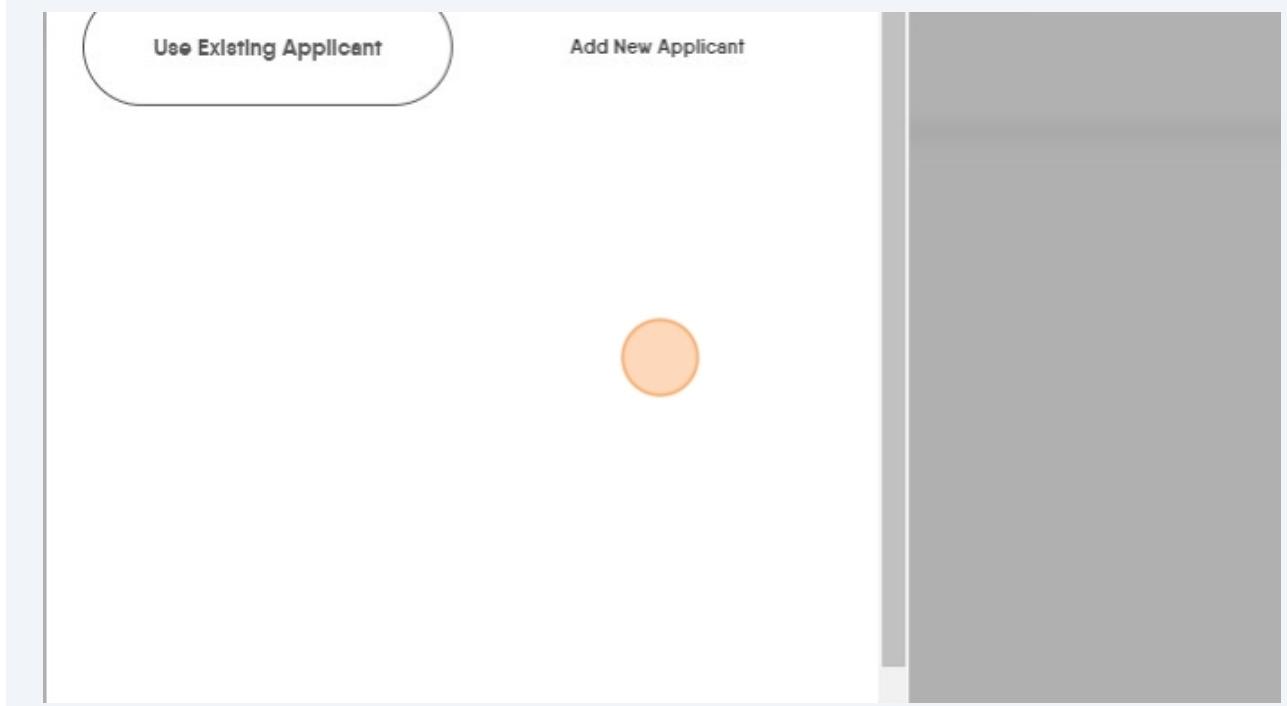
**22** To add a second applicant, for example a Partner. Click "Linked Applicants"



**23** Click "Link Applicant"



24 Click "Add New Applicant" to add a new applicant to the CRM or 'Use Existing...' to pick a record from within your CRM database.





Tip! Make sure that when you do this, the applicant you are searching for is added to the same branch or, you have all your companies branches enabled in your configuration. To check this, click on the 'Bento menu' and select the 'Active Branches' option.

25

Adding New Applicant. Click "Choose Title" and then complete all the fields as required.

The screenshot shows a user interface for adding a new applicant. On the left, a large gray area represents a blurred background. On the right, there is a form with the following fields:

- A top-level input field labeled "Contact type".
- A large button labeled "Use Existing Applicant" on the left and "Add New Applicant" on the right.
- A section for personal details, divided into two columns:
  - Left column: "Title" (dropdown menu with "Choose Title" selected, highlighted with an orange circle), "Surname" (input field "Enter Surname"), "Phone number" (input field "Enter Home Phone Number"), and "Link applicant contact type" (input field).
  - Right column: "Forename" (input field "Enter Forename"), "Email address" (input field "Enter Email Address"), "Mobile phone" (input field "Enter Mobile Phone Number"), and an empty input field.

26

Set the '...Contact type' so the CRM can identify what the relationship is between the applicants.

The screenshot shows a CRM application form for an applicant. The top section contains the following fields:

- Title: Mrs
- Forename: Stephanie
- Surname: Emery
- Email address: stepahine@emery.jp
- Phone number: 01865860873
- Mobile phone: 07860123123

Below these fields is a dropdown menu titled "Link applicant contact type" with the following options:

- Solicitor
- Tax Advisor
- Emergency Contact
- Guarantor
- Partner

The "Partner" option is highlighted with an orange circle.

27

For example click "Partner"

The screenshot shows the same CRM application form as the previous one, but with the "Partner" option selected in the dropdown menu. The "Partner" option is highlighted with an orange circle.

28

If the address is the same as Applicant 1 Click "Use same address as current applicant" if not, add the postcode and search as shown above.

Stepahine

Surname: Emery

Email address: stepahine@emery.jp

Phone number: 01865860873

Mobile phone: 07860123123

Link applicant contact type: Partner

Use same address as current applicant

Postcode: 0873

Address: Select Address

Enter address manually

Cancel

Link

29

Click "Link" to link the two applicants.

stepahine@emery.jp

Mobile phone: 07860123123

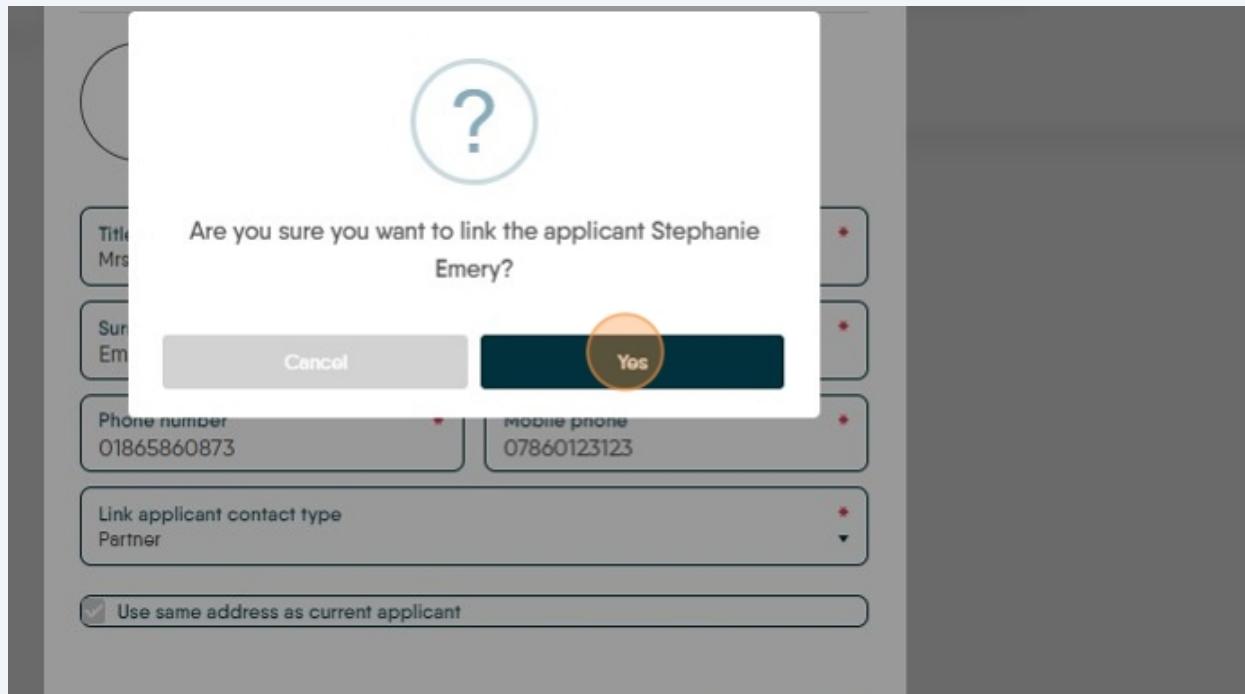
Link applicant contact type

Use same address as current applicant

Cancel

Link

30 Click "Yes" to confirm that you want to link the two records.



31 If you click onto the search icon and search, you will find that the 2 applicants are now showing in CRM.

