

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.

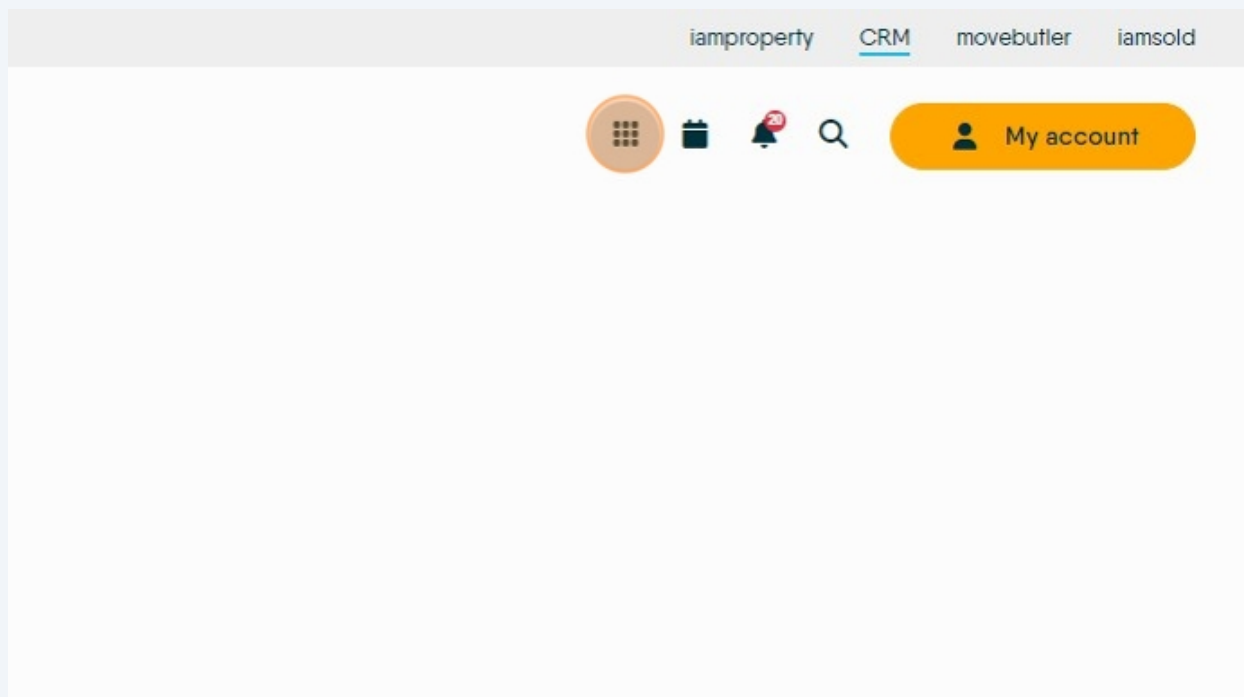
1

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

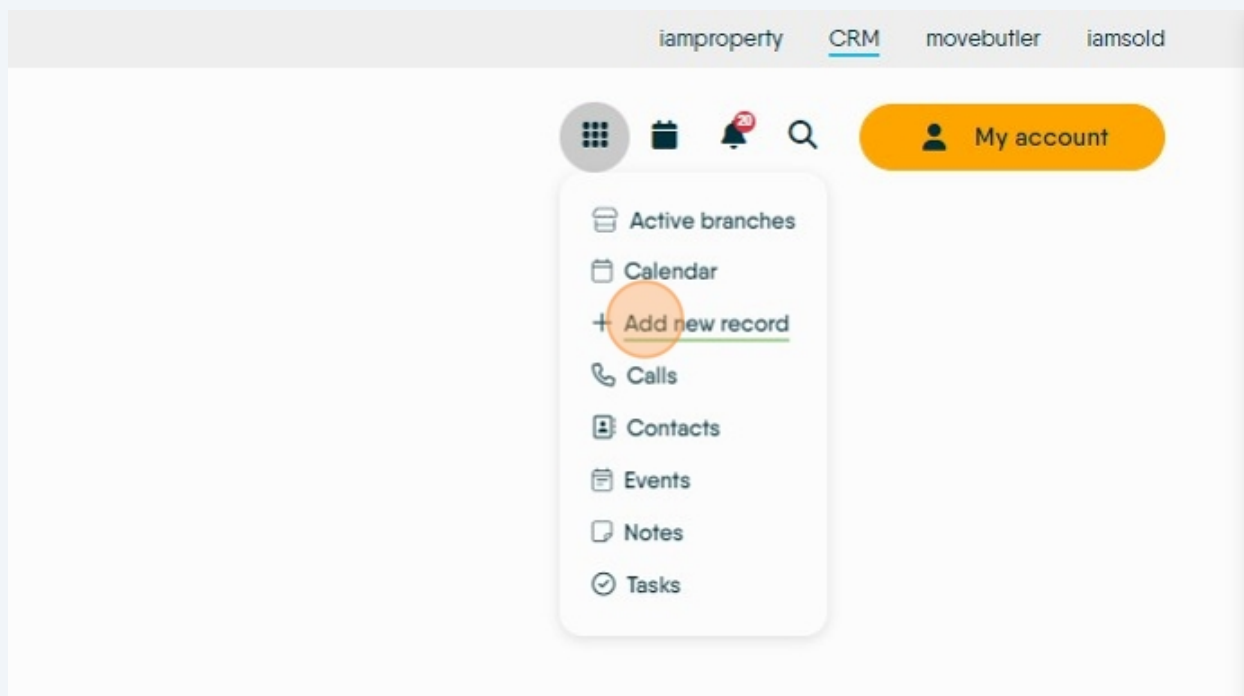


Tip! You can perform this process from anywhere within the CRM, the menu icon (aka bento menu) is available from any page in the CRM system.

- 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"

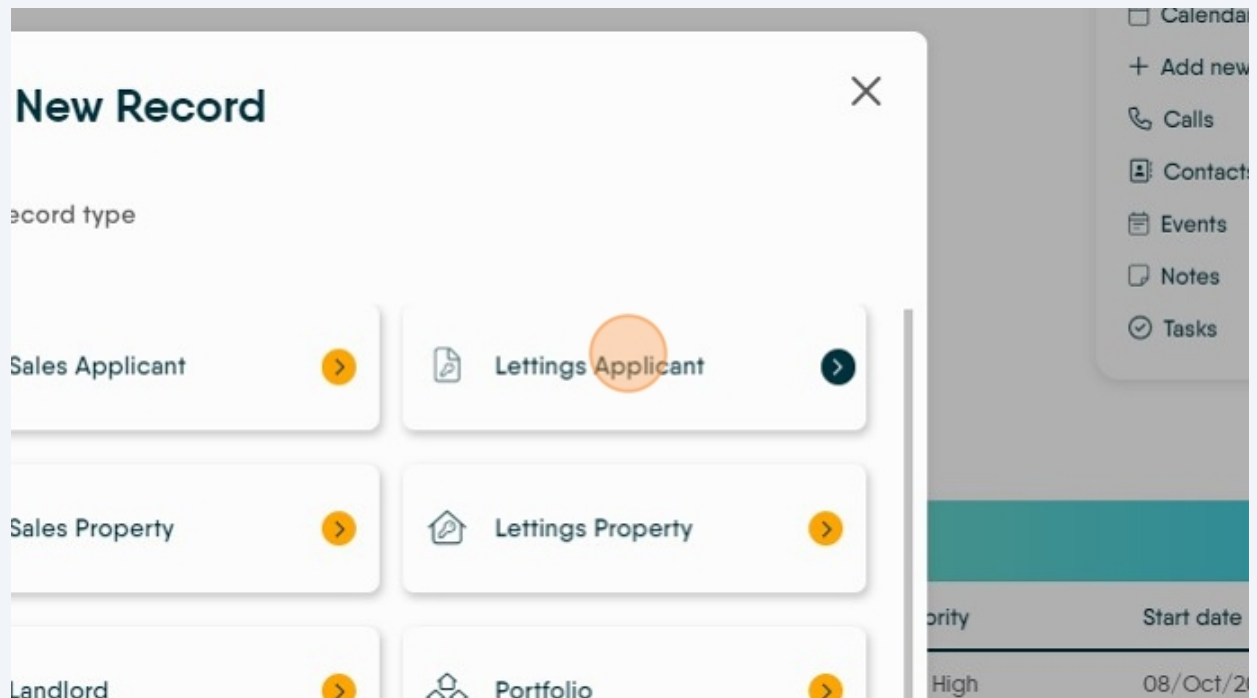




Tip! This process is the same if you are creating a Sales Applicant or a Lettings Applicant. Here we are using a Lettings Applicant.

4

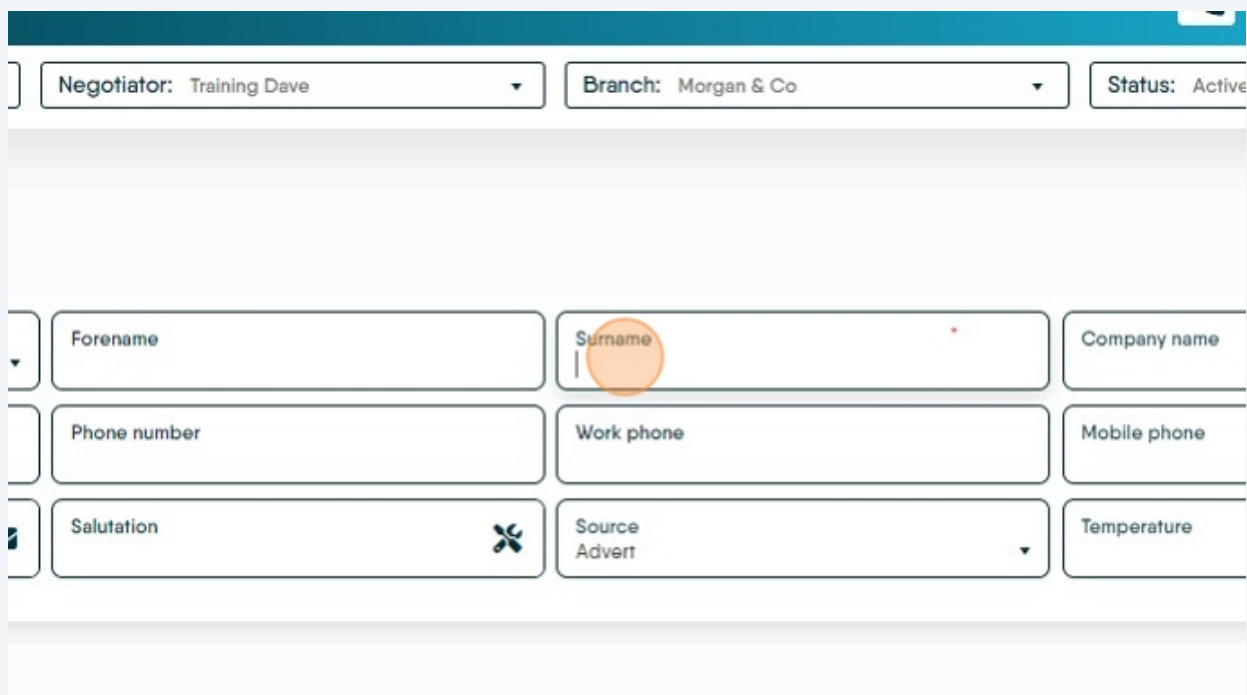
Click "Lettings Applicant"



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 in a new tab and you won't 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.

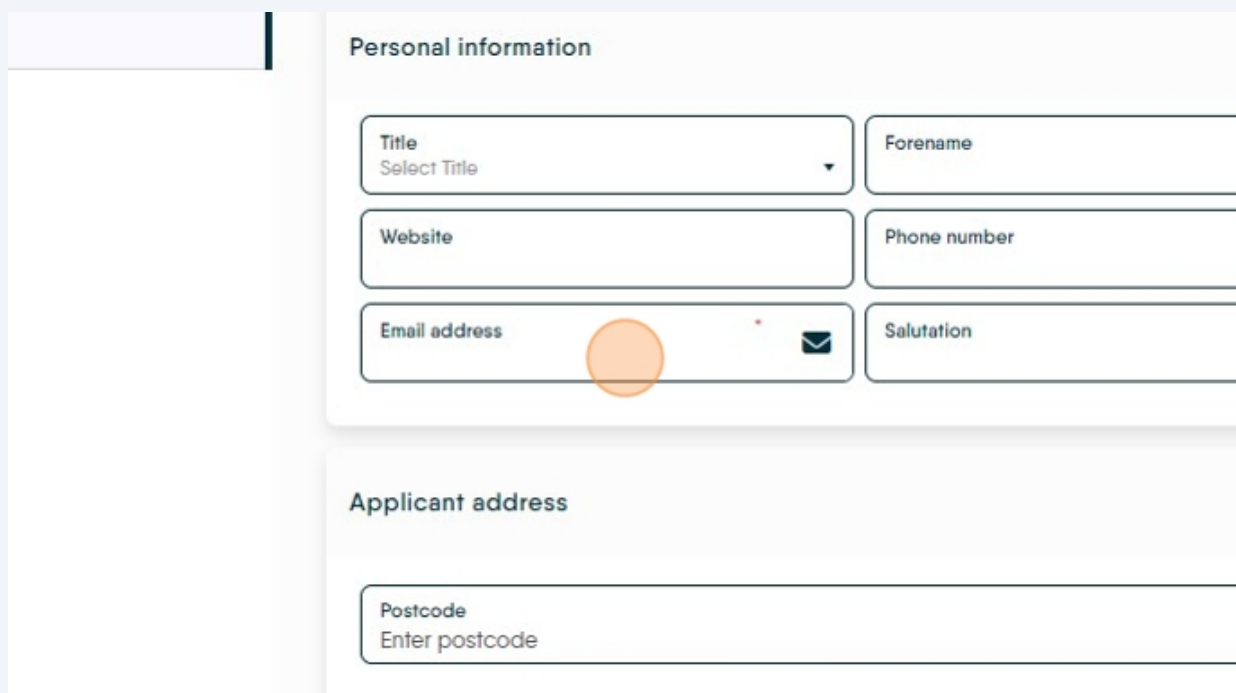


Negotiator: Training Dave Branch: Morgan & Co Status: Active

Forename	Surname	Company name
Phone number	Work phone	Mobile phone
Salutation	Source 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 Select Title	Forename
Website	Phone number
Email address	Salutation

Applicant address

Postcode 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 displays a web application interface for managing applicant information. On the left, a sidebar contains a search bar labeled 'Temp.' and a list of items, one of which is labeled 'cted' with a date '01/01/0001 00:00'. Below this is a section titled 'Details'. The main content area features a dark teal header bar. Below the header, there are two input fields: 'Reference:' and 'Negotiator: Training Dav'. The central part of the form is titled 'Personal information' and contains several input fields: 'Title' (a dropdown menu with 'Select Title' and an orange circle icon), 'Forename', 'Website', 'Phone number', 'Email address' (containing 'crm.training@iamproperty.com' and a red asterisk), and 'Salutation'. At the bottom, there is a section titled 'Applicant address'.

8 Add Title

The screenshot shows a 'Personal information' form. On the left is a large empty box. To its right is a form with several fields. The 'Title' field has a dropdown menu open, showing options: 'Mr' (highlighted with an orange circle), 'Miss', 'Mrs', and 'Ms'. To the right of the 'Title' field are three stacked input fields labeled 'Forename', 'Phone number', and 'Salutation'. Below these is a 'Postcode' field with the placeholder text '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 Mr	Forename 	Surname Emery
Website	Phone number	Work phone
Email address crm.training@iamproperty.com	Salutation	Source Advert

Applicant address

n

	Forename Steven	Surname Emery
	Phone number 	Work phone
property.com	Salutation	Source Advert

Import

	Surname Emery	Company name
	Work phone	Mobile phone
	Source Advert	Temperature

Edit manually

Address

	Forename Steven	Surname Emery	Company name
	Phone number 078546336699	Work phone	Mobile phone 078546336699
	Salutation	Source Advert	Temperature

Build Salutation

Address

10

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

The screenshot shows a user profile form. On the left is a sidebar with a list of items, including one with a price of £0.00. The main form area contains several sections:

- Email address:** A text field containing "crm.training@iamproperty.com" with an email icon to its right.
- Salutation:** A dropdown menu showing "Mr Emery".
- Applicant address:** A section containing a "Postcode" field with the placeholder text "Enter postcode". An orange circle highlights this field.
- Contact notes:** A section with a rich text editor containing bold (B), italic (I), underline (U), and link icons, followed by the placeholder text "Type Contact Notes here..."

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

Tempo

Address

Address
-- Select 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, DH22HX, UK

My account

Source
Advert

Temperature

Edit manually

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

iamproperty

My day

Lettings

Sales

Accounts

Reporting

Communications

My account

Latest Offer

£0.00

Offer Status

Status

Applicant Temp.

Last Contacted

01/01/0001 00:00

Details

Email address

crm.training@iamproperty.com

Salutation

Mr Emery

Source

Advert

Temperature

Applicant address

Edit manually

Postcode

dh2 2hx

Address

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

House

78

Unit

Pelaw Crescent

Line2

Town

Chester le Street

Country

County Durham

Country

UK

Contact notes

B I U

Type Contact Notes here...

Applicant criteria

Search for Area...

1/4 Mile

Add Area

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.

01/01/0001 00:00

Chester le Street

County Durr

Contact notes

B **I** **U**

Type Contact Notes here...

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 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.

ffer £0.00

atus

nt Temp.

ntacted 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

1/4 Mile

1/2 Mile

1 Mile

3 Miles

5 Miles

Max Price £0

Minimum Bathroo



My account

1/2 Mile

Add Area

Minimum Bedrooms

0

Minimum Bathrooms

0

Applicant criteria

Search for Area...

1/4

x Witney, UK - 1/2 Mile

Min Price

£0

Max Price

£0

Min

Move in date
10/10/2024

Property Attributes

Pets Allowed



Furnished



Property Type

Search Property Type

Apartment

01/01/0001 00:00

Last Contacted

01/01/0001 00:00

 Details

x Witney, UK - 1/2 Mile

Min Price £500

Max Price

Move in date
10/10/2024

Property Attributes

Pets Allowed



Furnished



Part Furnished



x 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

B *I* U 

Type Additional Information here...

User defined fields

15

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

Save Changes





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 displays a web application interface for managing applicant records. On the left, a sidebar menu contains several options: 'Details' (highlighted with a blue bar and an orange circle), 'Checklist', 'Viewings', 'Offers', 'Linked Applicants', and 'Contacts'. The main content area is divided into sections. At the top, there's a header with a profile icon 'DM', contact details 'morgan@morgant.tc' and '07885464639', and a teal banner showing the address '5 Milbank Crescent, Darlington, County Durham' with a 'Lettings' button. Below this, a 'Reference:' field and a 'Negotiator: David-George Morgan' field are visible. The 'Personal information' section includes fields for 'Title' (a dropdown menu), 'Forename' (filled with 'David'), 'Website', 'Phone number' (filled with '0'), 'Email address' (filled with 'morgan@morgant.tc' and marked with a red asterisk), and 'Salutation'. The 'Applicant address' section is partially visible at the bottom.

Offer Status	Pending
Status	A
Applicant Temp.	H
Last Contacted	

Details

- Checklist
- Viewings
- Offers
- Linked Applicants
- Contacts

Personal information

Title Select Title	Forename David
Website	Phone number 0
Email address morgan@morgant.tc	Salutation

Applicant address

17

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

Status

A

Applicant Temp.

H

Last Contacted

788 Pelaw Crescent, Chester le Street, Cou

Reference:

Negotiator:

Details

Checklist

Viewings

Offers

Linked Applicants

Personal information

Title

Mr

Forename

Steven

Website

Phone num

07854633

Email address

crm.training@iamproperty.com

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.

Reference:

Negotiator: Training Dave

Branch: Morgan & Co

Status: Active

New applicant setup

0 of 6 checked

☐
Property Details Required Captured

☐
Contact Details Confirmed

☐
New option

☐
Evidence Provided and Logged

☐
Information Checked and Verified

☐
Are they nice people

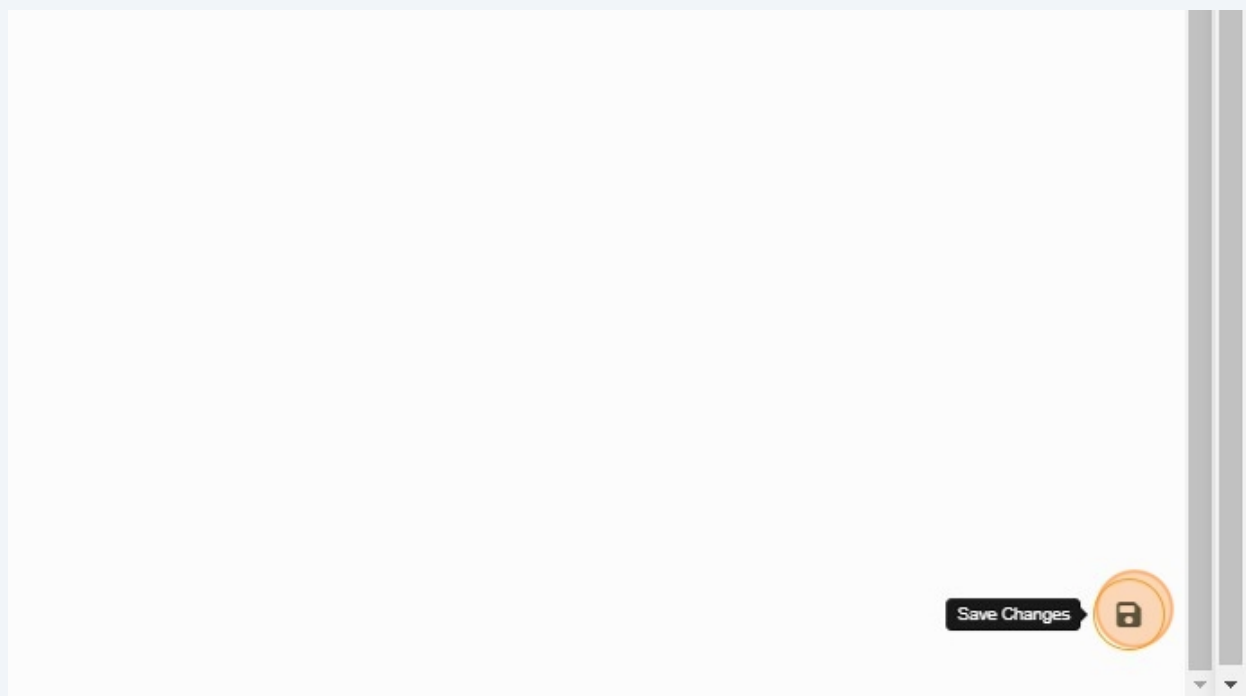
New checklist

0 of 1 checked

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

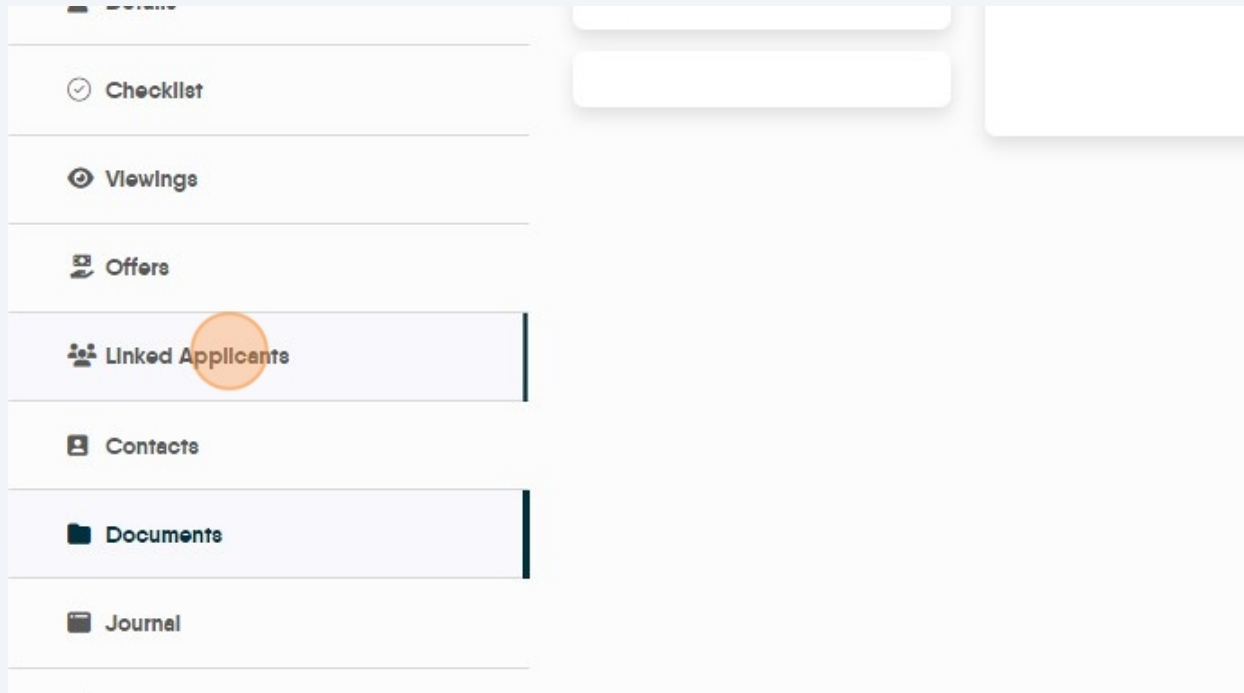


20 Don't forget to save as you go!

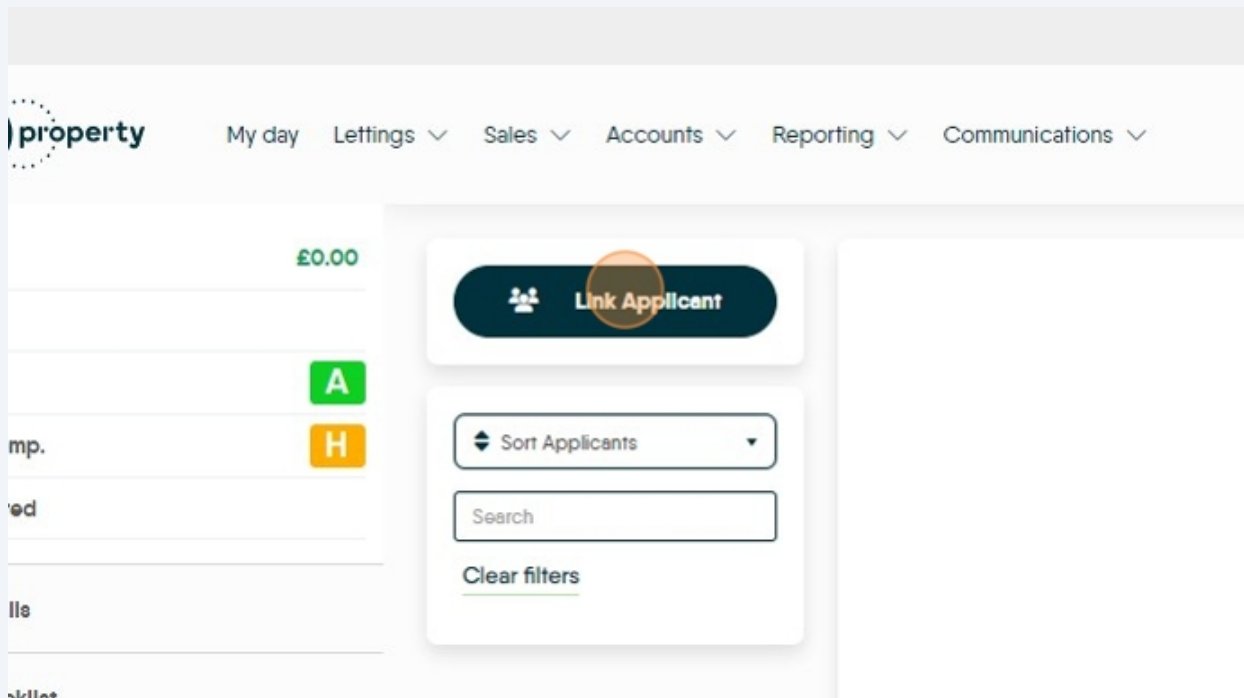


21 Complete all of the other screens as required.

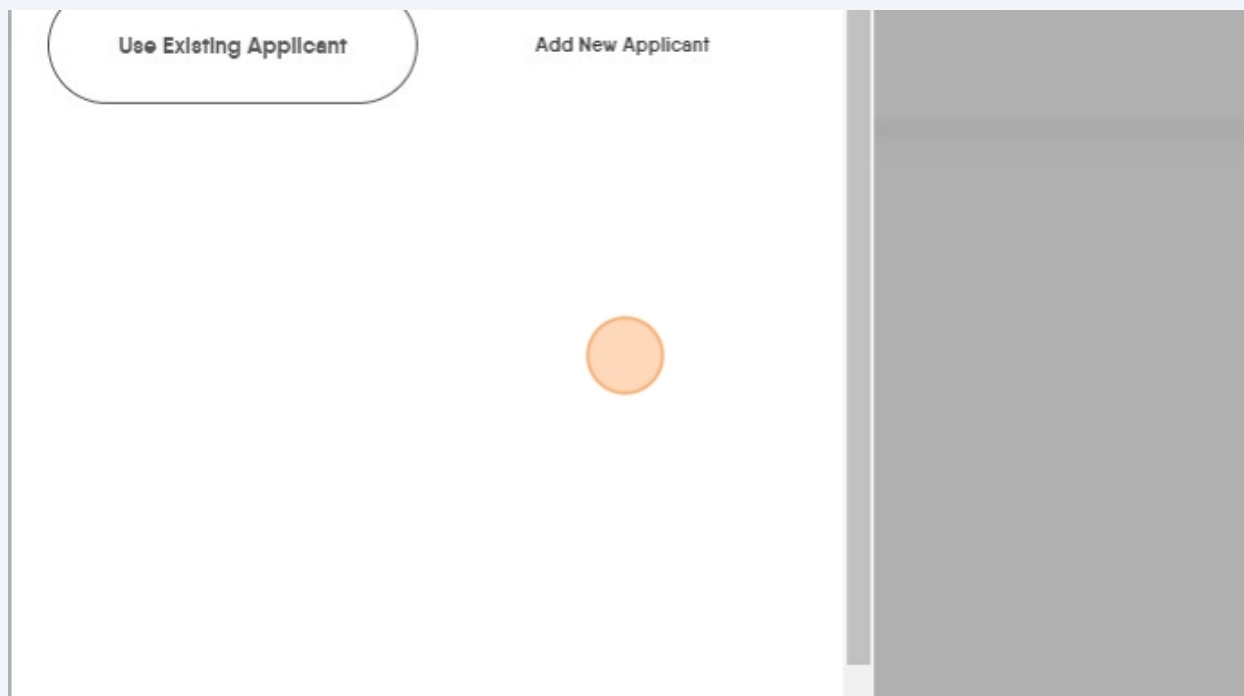
22 To add a second applicant, for example a Partner. Click "Linked Applicants"



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.

Contact type

Use Existing Applicant Add New Applicant

Title Choose Title *

Forename Enter Forename

Surname Enter Surname *

Email address Enter Email Address

Phone number Enter Home Phone Number *

Mobile phone Enter Mobile Phone Number

Link applicant contact type

26

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

A screenshot of a CRM form with the following fields:

- Title: Mrs (dropdown menu)
- Forename: Stephanie
- Surname: Emery
- Email address: stepahine@emery.jp
- Phone number: 01865860873
- Mobile phone: 07860123123
- Link applicant contact type: (dropdown menu with an orange circle highlighting the selection area)

The dropdown menu for 'Link applicant contact type' is open, showing the following options:

- Solicitor
- Tax Advisor
- Emergency Contact
- Guarantor

27

For example click "Partner"

A screenshot of the CRM form showing the 'Link applicant contact type' dropdown menu. The dropdown menu is open, and the 'Partner' option is highlighted with an orange circle. The other options visible are Solicitor, Tax Advisor, Emergency Contact, and Guarantor.

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.

First name: [Redacted]

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: [Redacted] *

Address: Select Address

[Enter address manually](#)

Cancel Link

29

Click "Link" to link the two applicants.

First name: [Redacted]

Email address: stepahine@emery.jp

Phone number: 01865860873 *

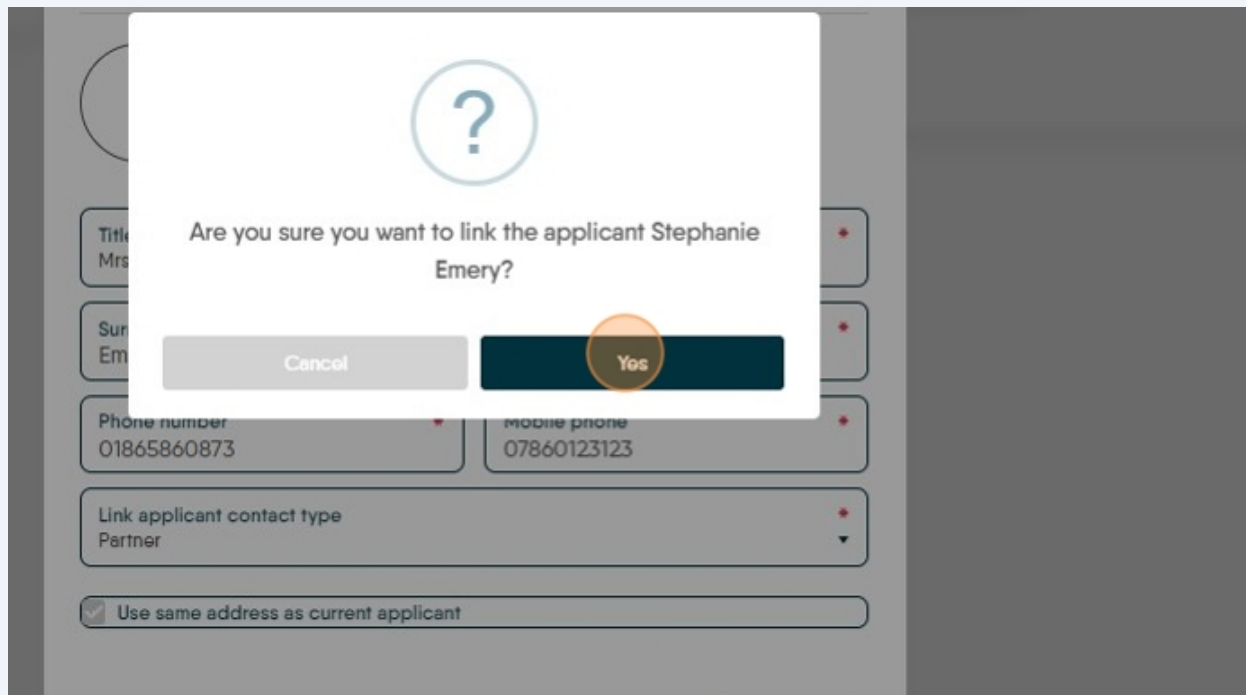
Mobile phone: 07860123123 *

Link applicant contact type: Partner *

☒ 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.

