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.

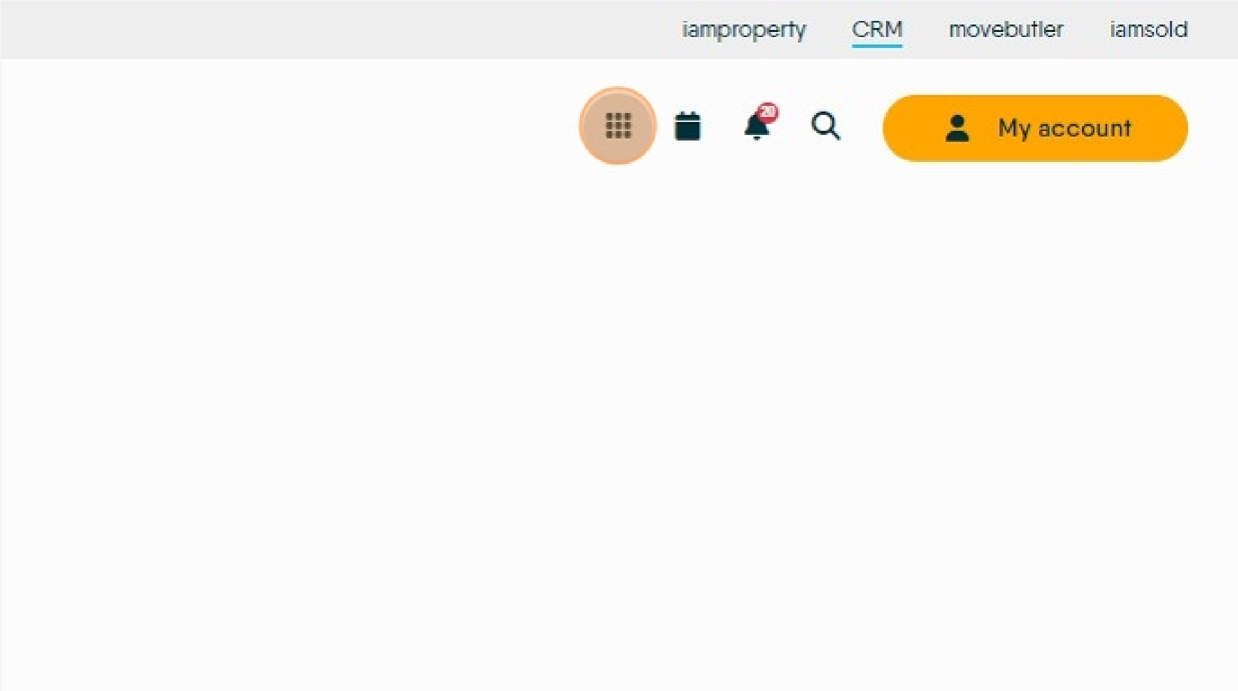
This allows checking of documents and referencing to be done easily and quickly from within the CRM and Letzone, credit checks using 'Vision+' can also be done with out needing to re key data.

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.

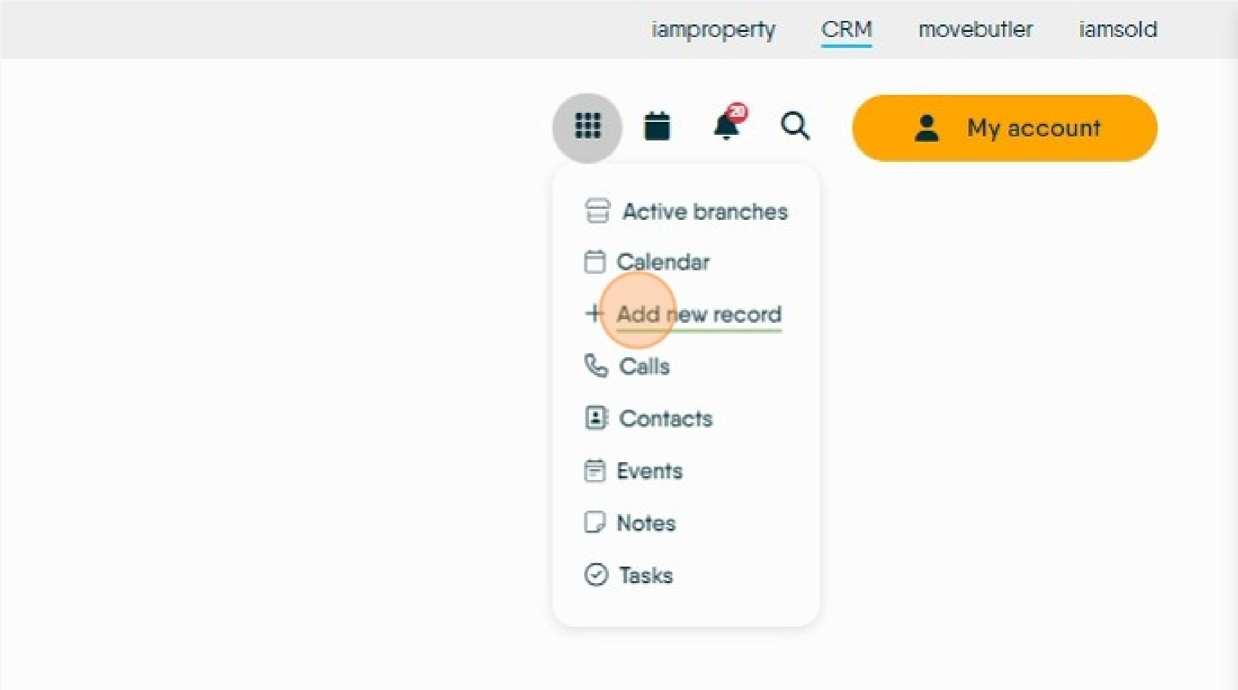
1 Navigate to https://crm.iamproperty.com/MyDay

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)

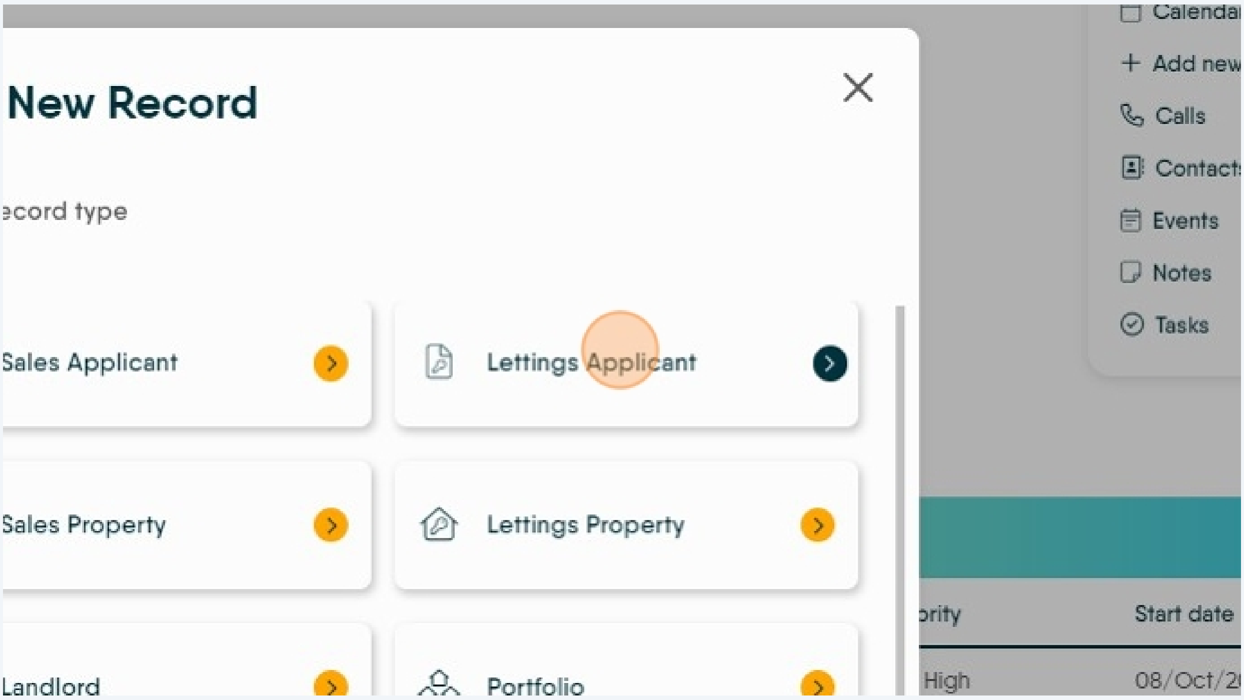


3 From the dropdown menu Click "Add new record"



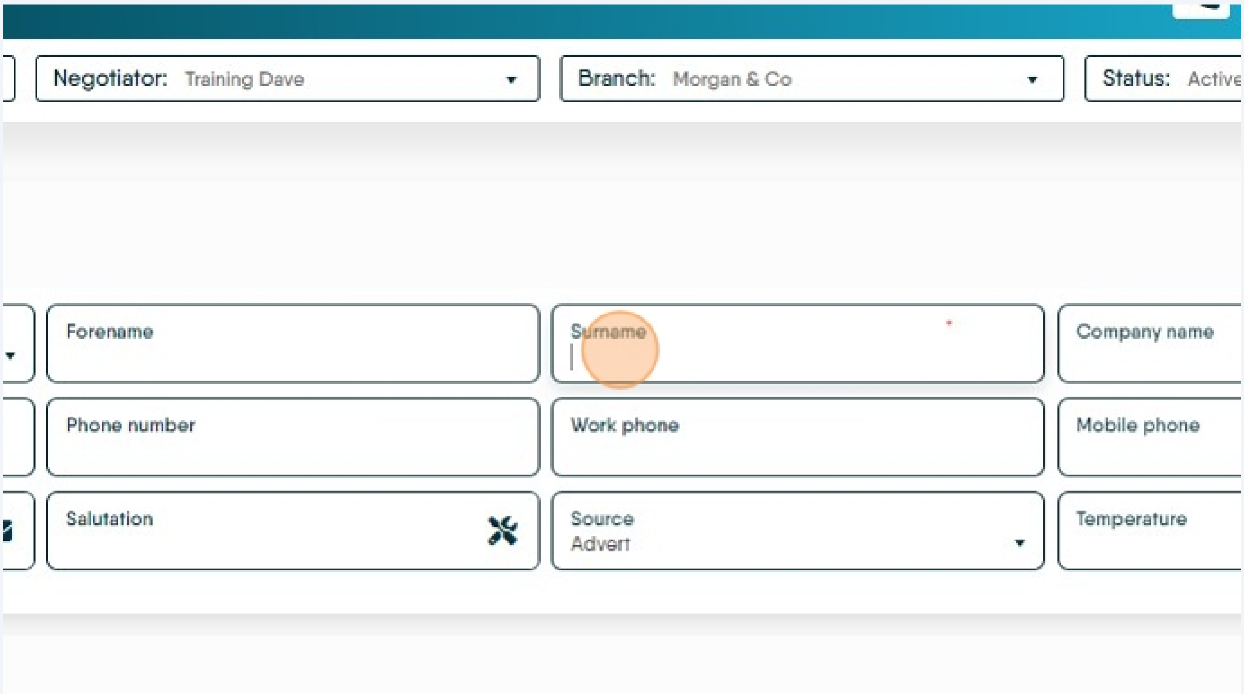
Tip! This process is the same if you are creating a Sales Applicant or a Lettings Applicant. Here we are using a Lettings Applicant.

4 Click "Lettings Applicant"

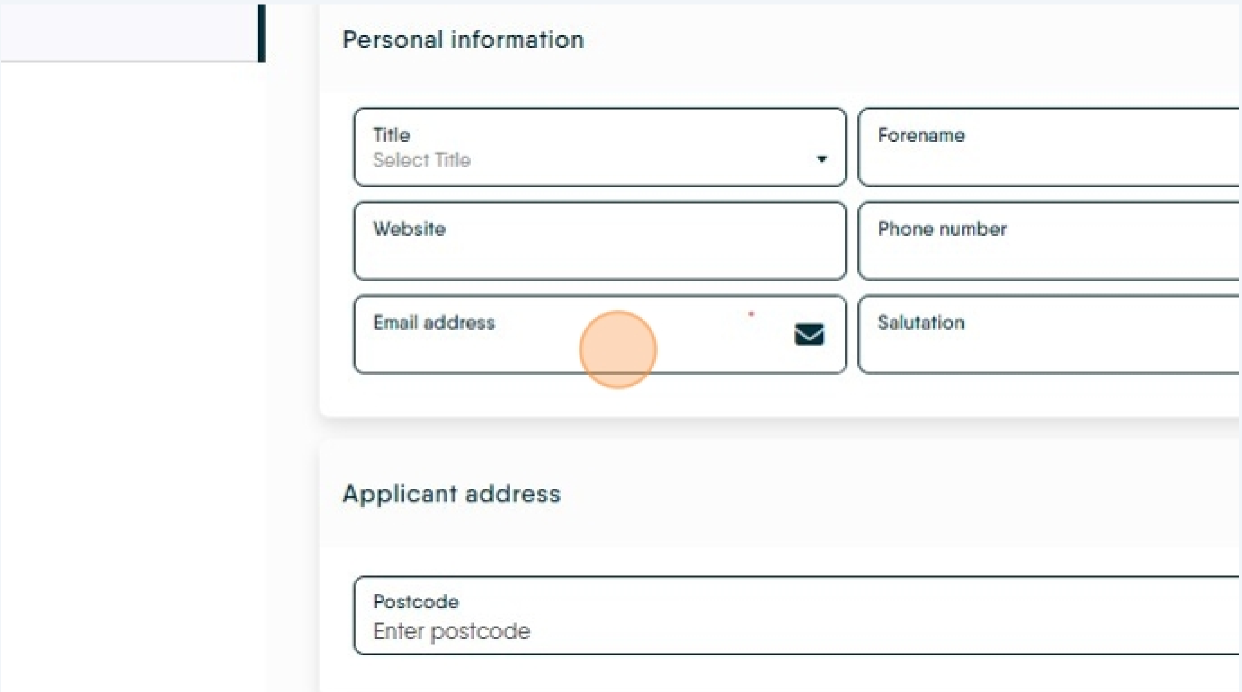


Tip! If you press and hold the 'Ctrl' key on your keyboard as you click onto the Lettings Applicant option (or other option) the screen will open a in a new tab and you wont lose where you are in the CRM.

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.



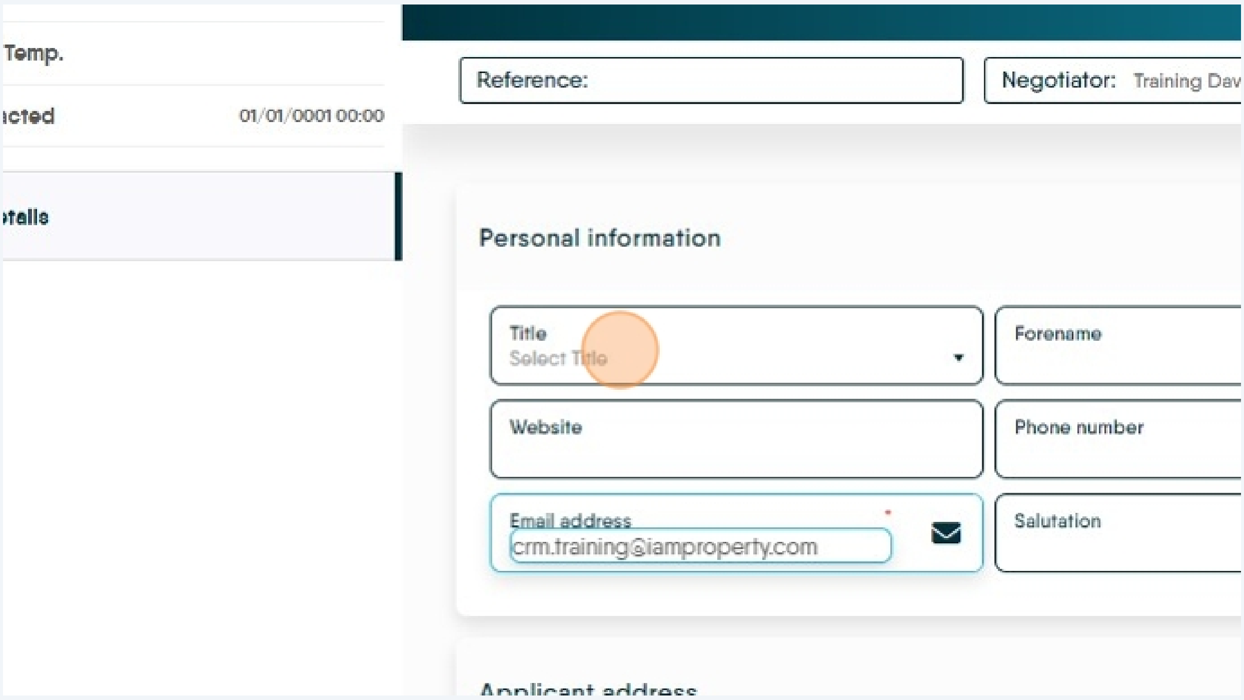
6 Click the "Email Address" field. If the email address has been used before (in either a Live or Archived record) a warning message will show and allow you to use or merge the original data, saving the duplication of entries and work.



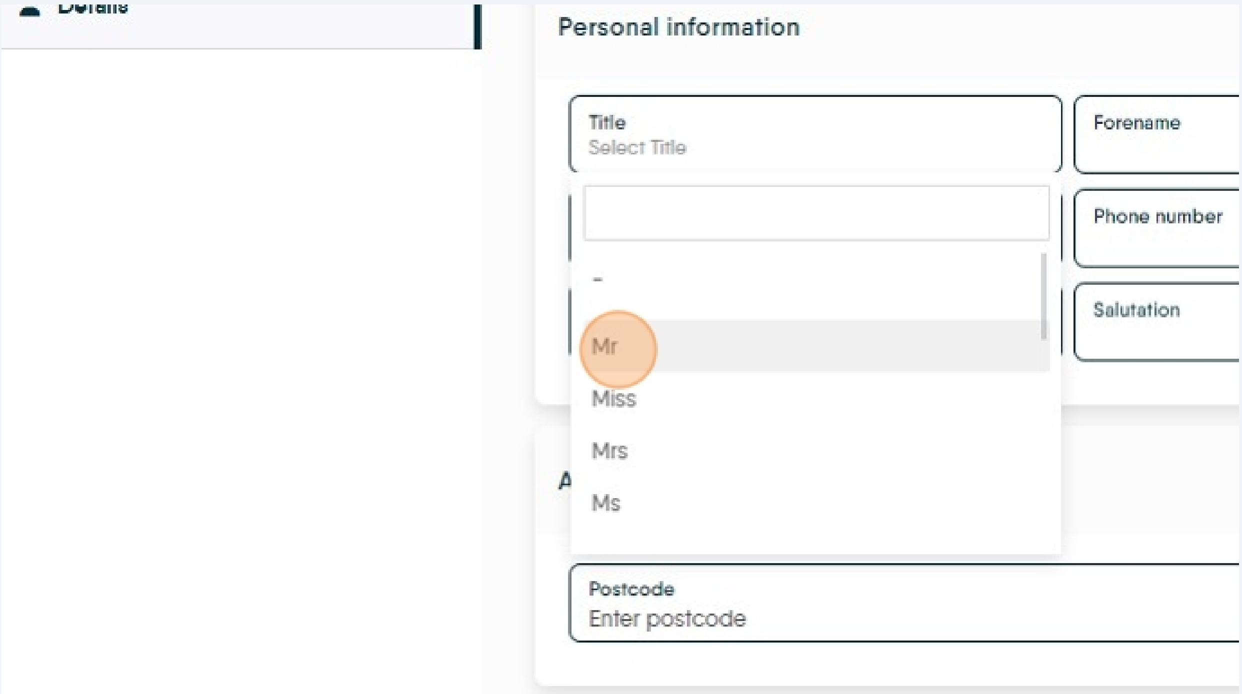
Tip! **For Lettings.** If you are using Letzone to manage the Pre Booked process, you can save the record here. Navigate to Letzone, create the Tenancy and send the Letzone welcome message from Letzone. The applicant will be able to update all of their own personal data from within the Letzone portal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

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

7 Complete the remaining Applicant information.



8 Add Title



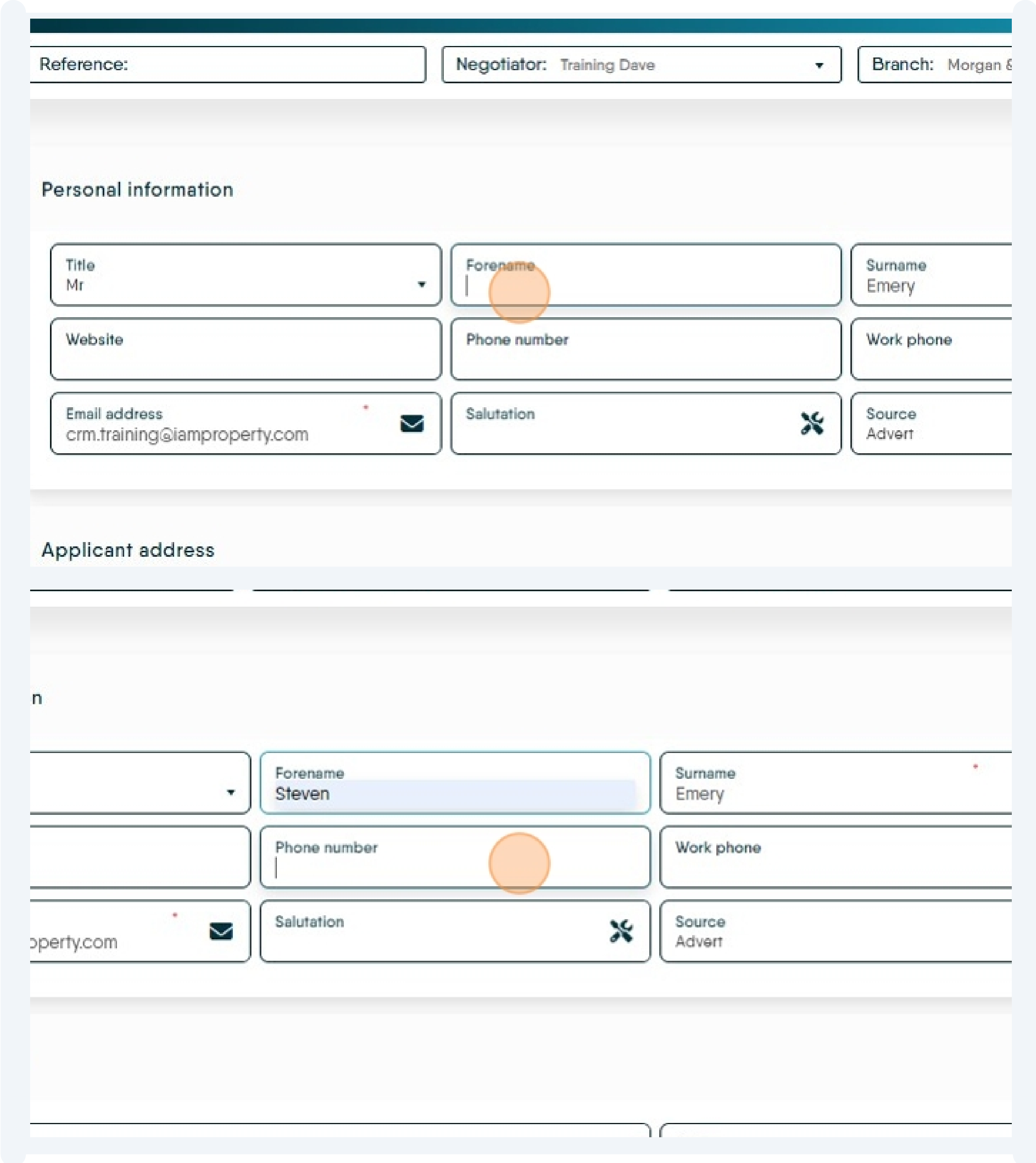
9 Add the applicant Forename.
Add Phone Numbers. If the Applicant only has a mobile phone number, add it to the Phone Number field as well as the Mobile number field.

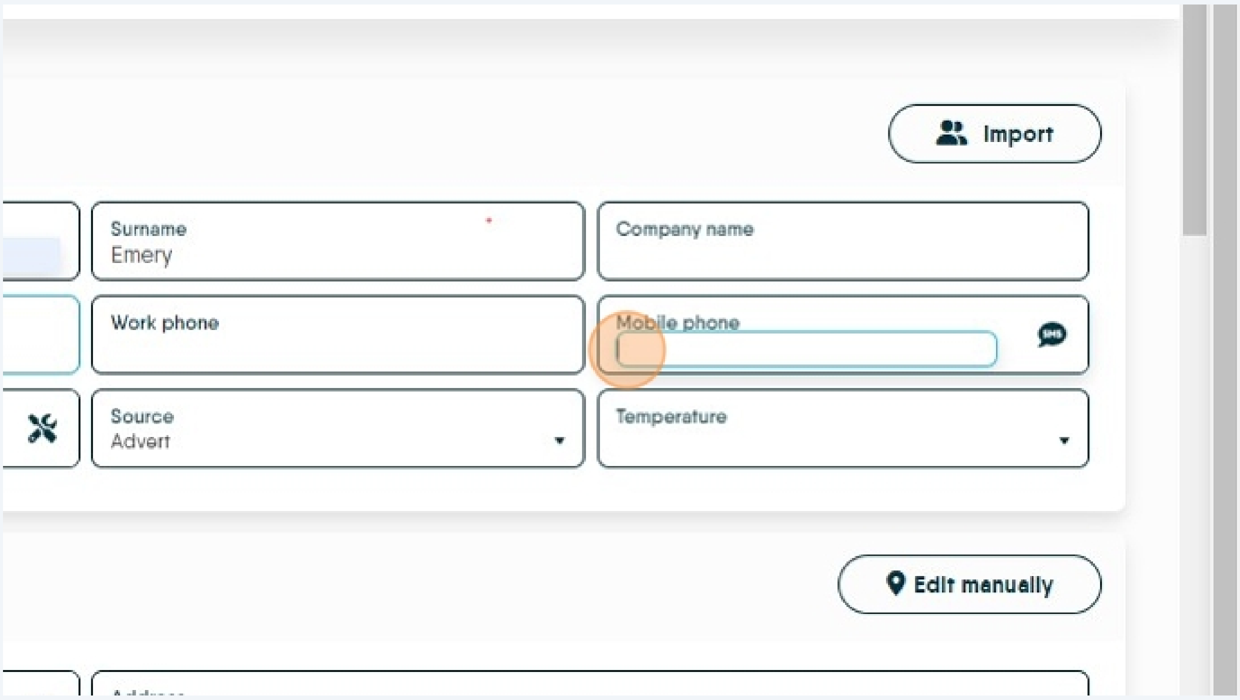
Tip! use **ctrl+c** *to copy the number from one field and* **ctrl+v** *to paste to another*

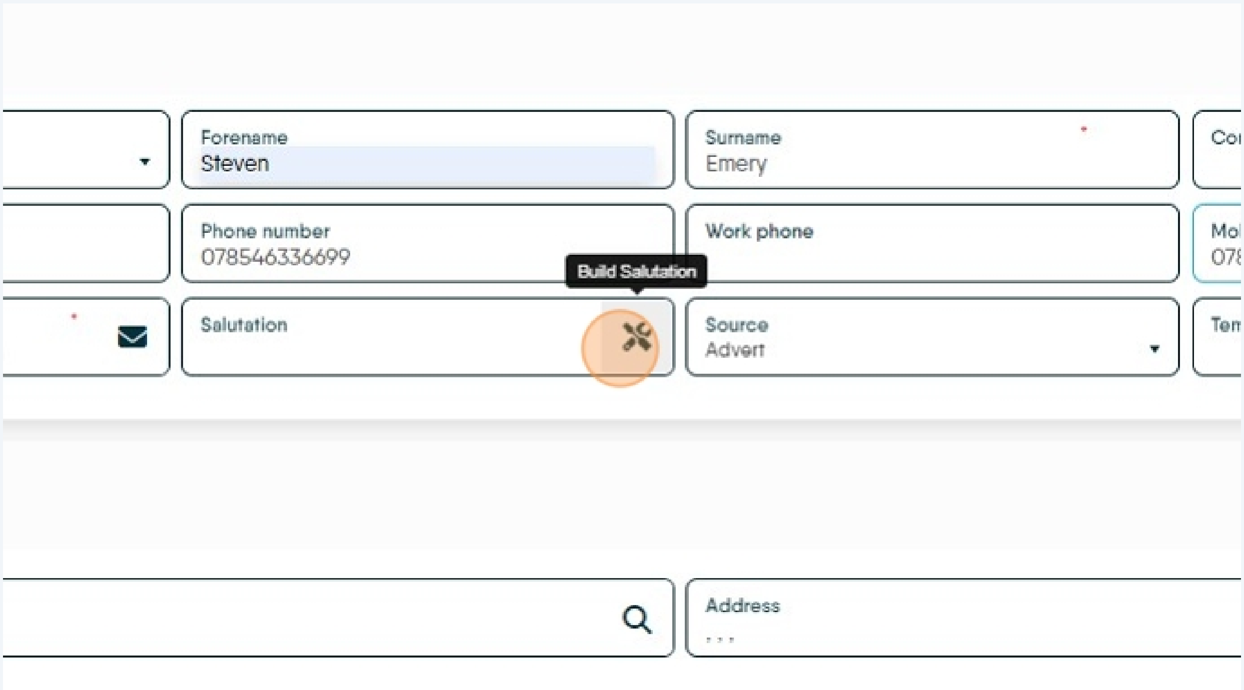
Adding a Mobile number into here allows SMS messages to be sent to the Applicant.

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.

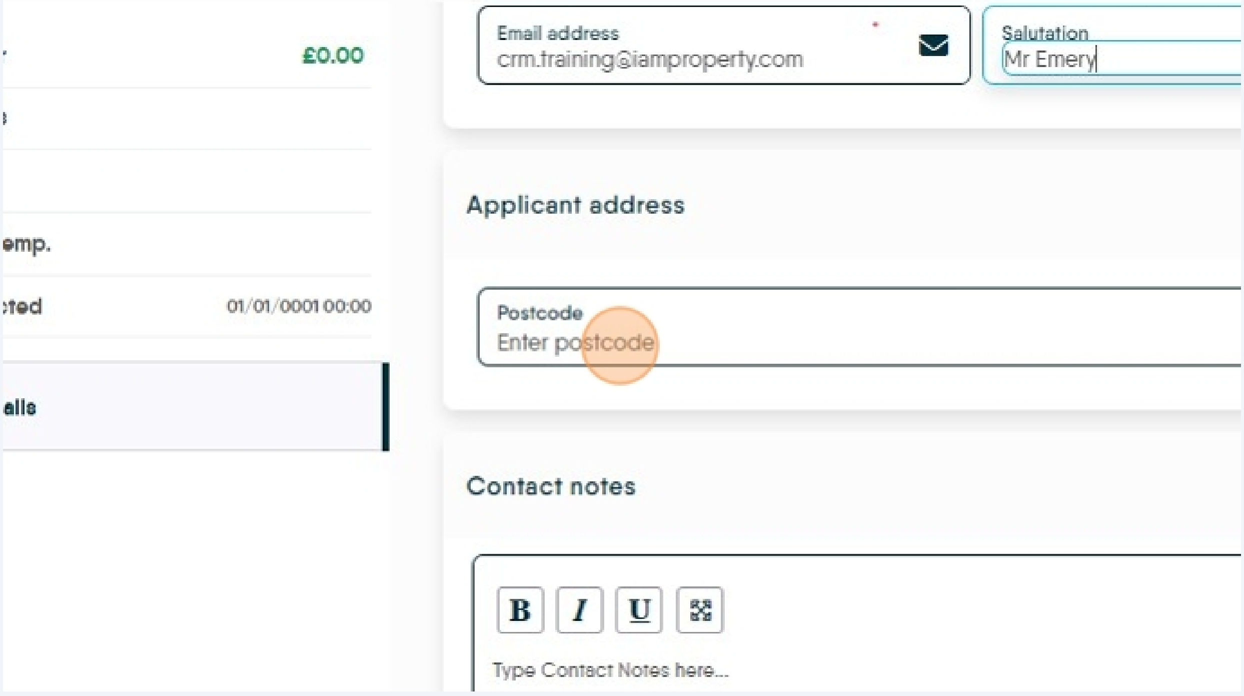
n.b. If this step is not done and you use the 'Salutation' template tag in a SMS or email template, when sent there will be an empty space in your message.


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
perty.com
Salutation
Source
Advert


Import
Surname
Emery
Company name
Work phone
Mobile phone
Source
Advert
Temperature
Edit manually


Forename
Steven
Surname
Emery
Phone number
078546336699
Work phone
Build Salutation
Salutation
Source
Advert
Address

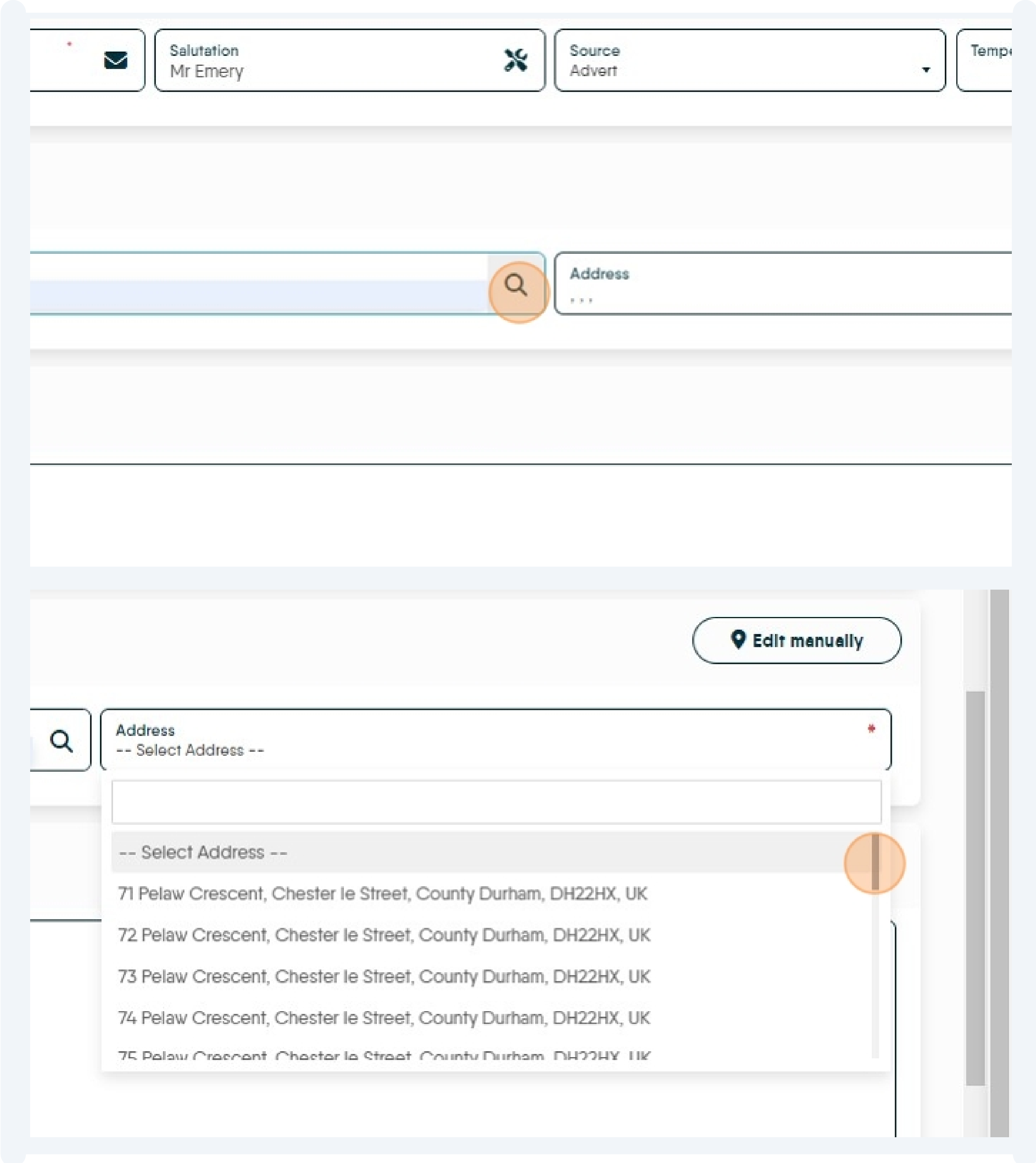
10 Click the "Enter postcode" field, add the Postcode for the Applicants current address.

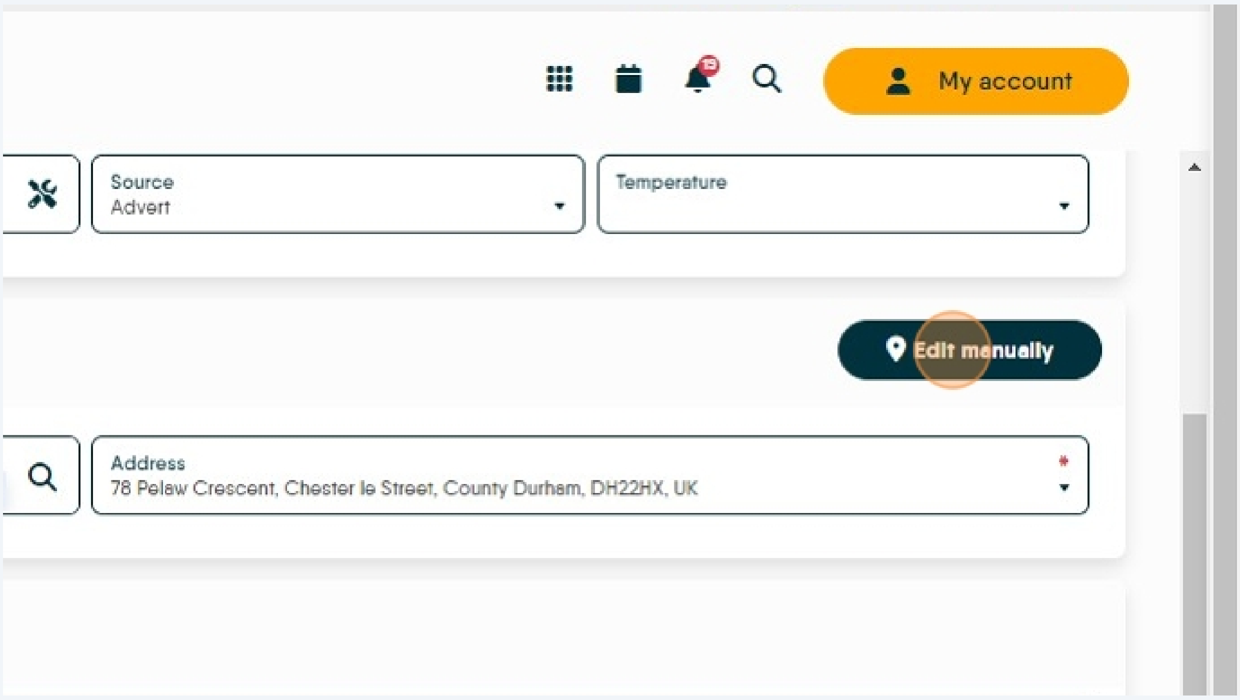


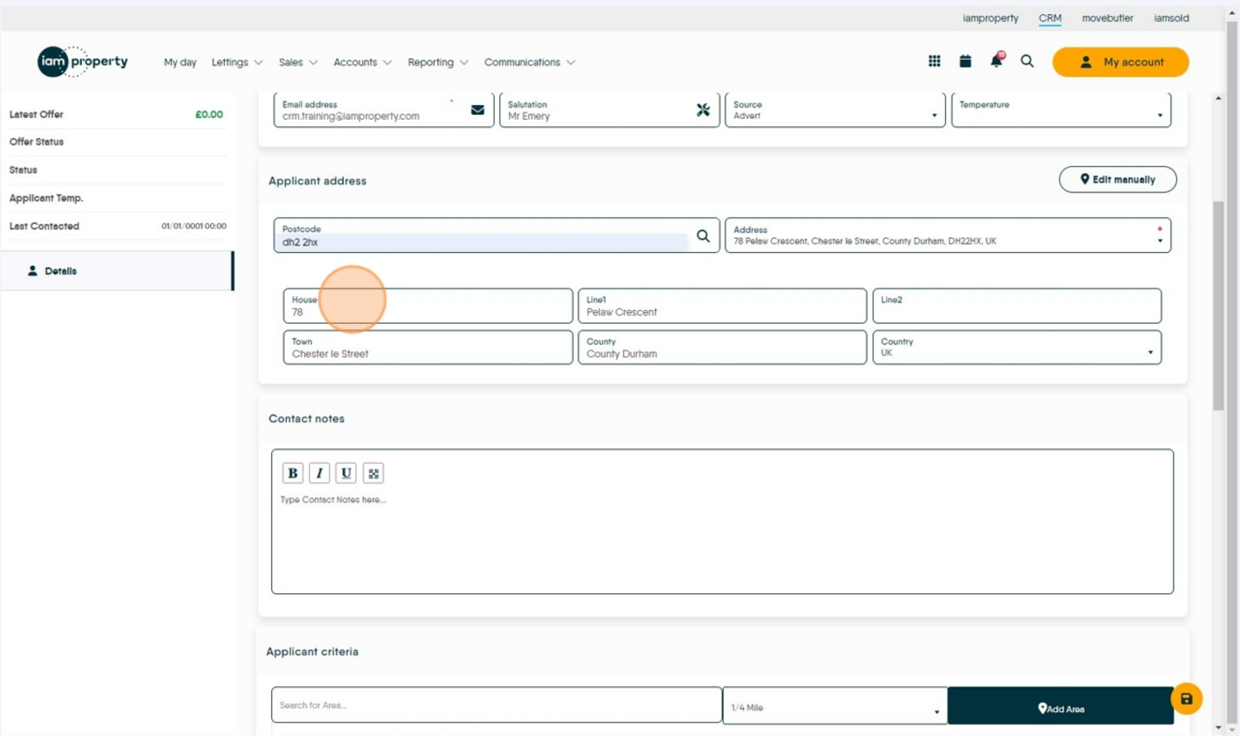
11 Click here to search for the Property details

Select the Property from the list.

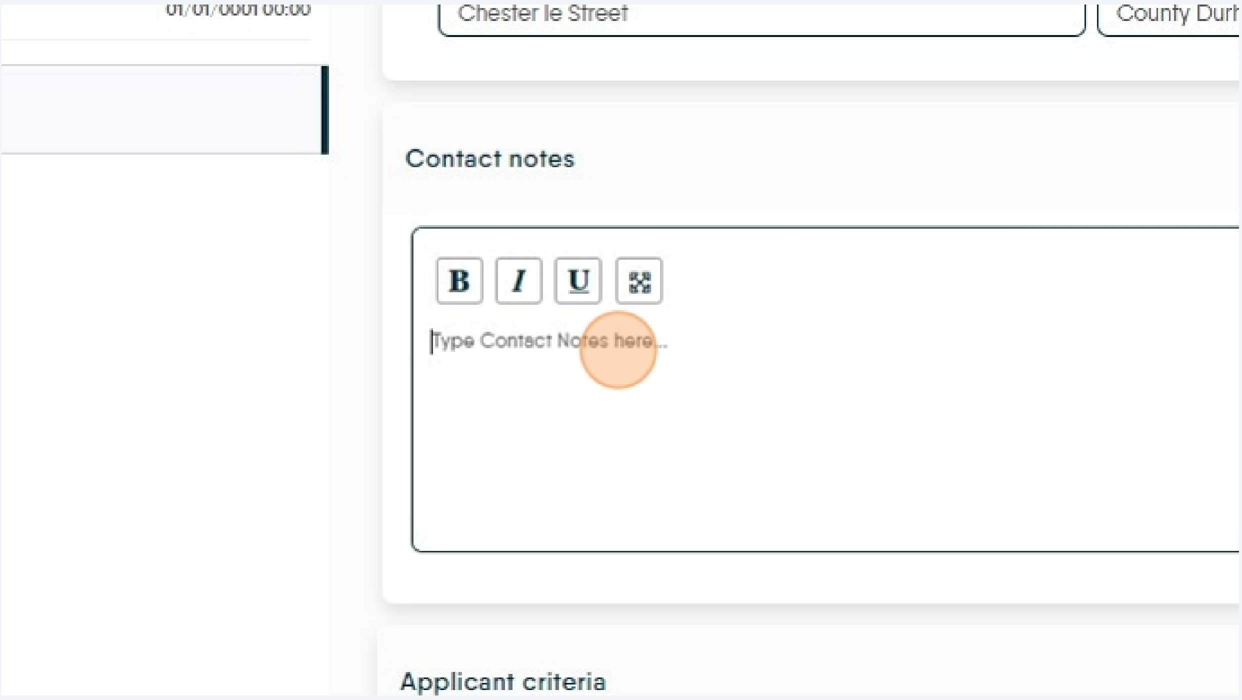
If the Property doesn't show, select the closest address match and then use the 'Edit Manually' option to update the information. Click "Edit manually"


Salutation
Mr Emery
Source
Advert
Address
Edit manually
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


My account
Source
Advert
Temperature
Edit manually
Address
78 Pelaw Crescent, Chester le Street, County Durham, DH22HX, UK


iamproperty
CRM
movebutler
iamsold
iam property
My day
Lettings
Sales
Accounts
Reporting
Communications
My account
Latest Offer
£0.00
Offer Status
Status
Applicant Temp.
Last Contacted
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
Line1
Pelaw Crescent
Line2
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

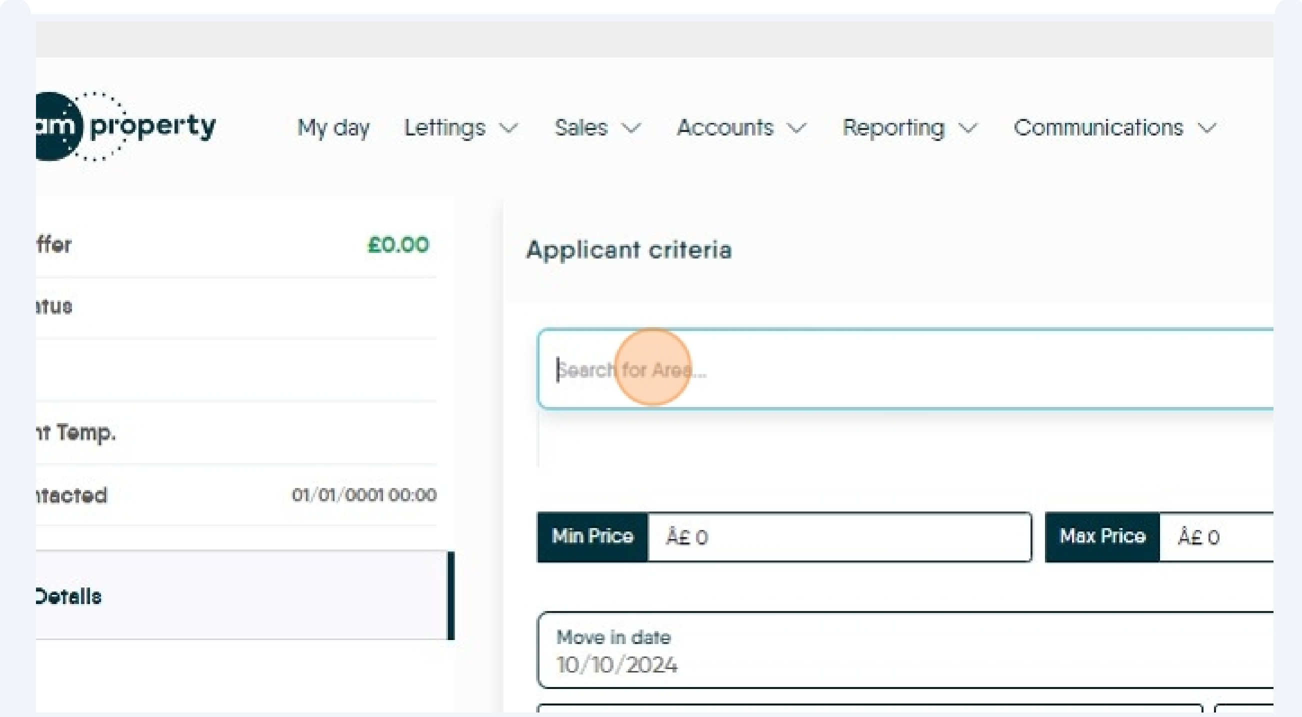
12 Contact Notes, this box can be used to take a record of any contact request the Applicant has made. Possibly they work nights, or can only be contacted by mobile phone etc.

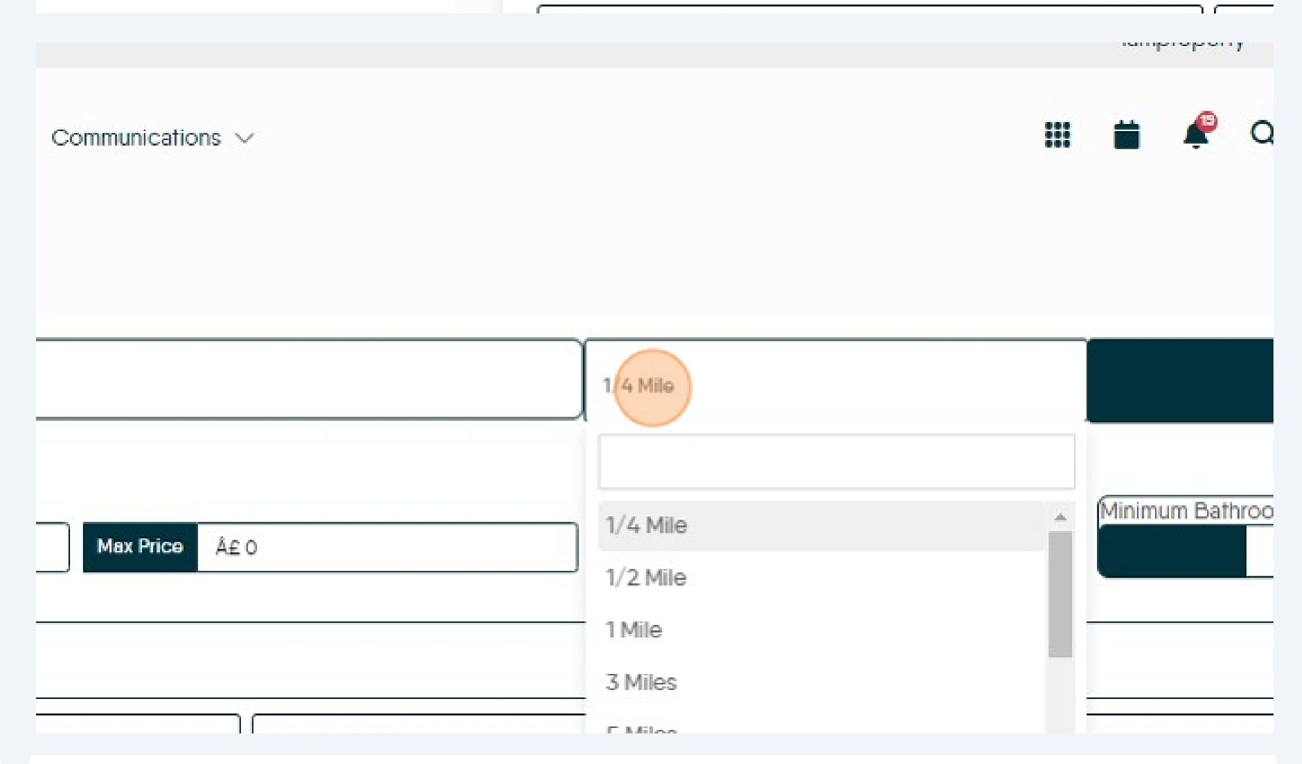


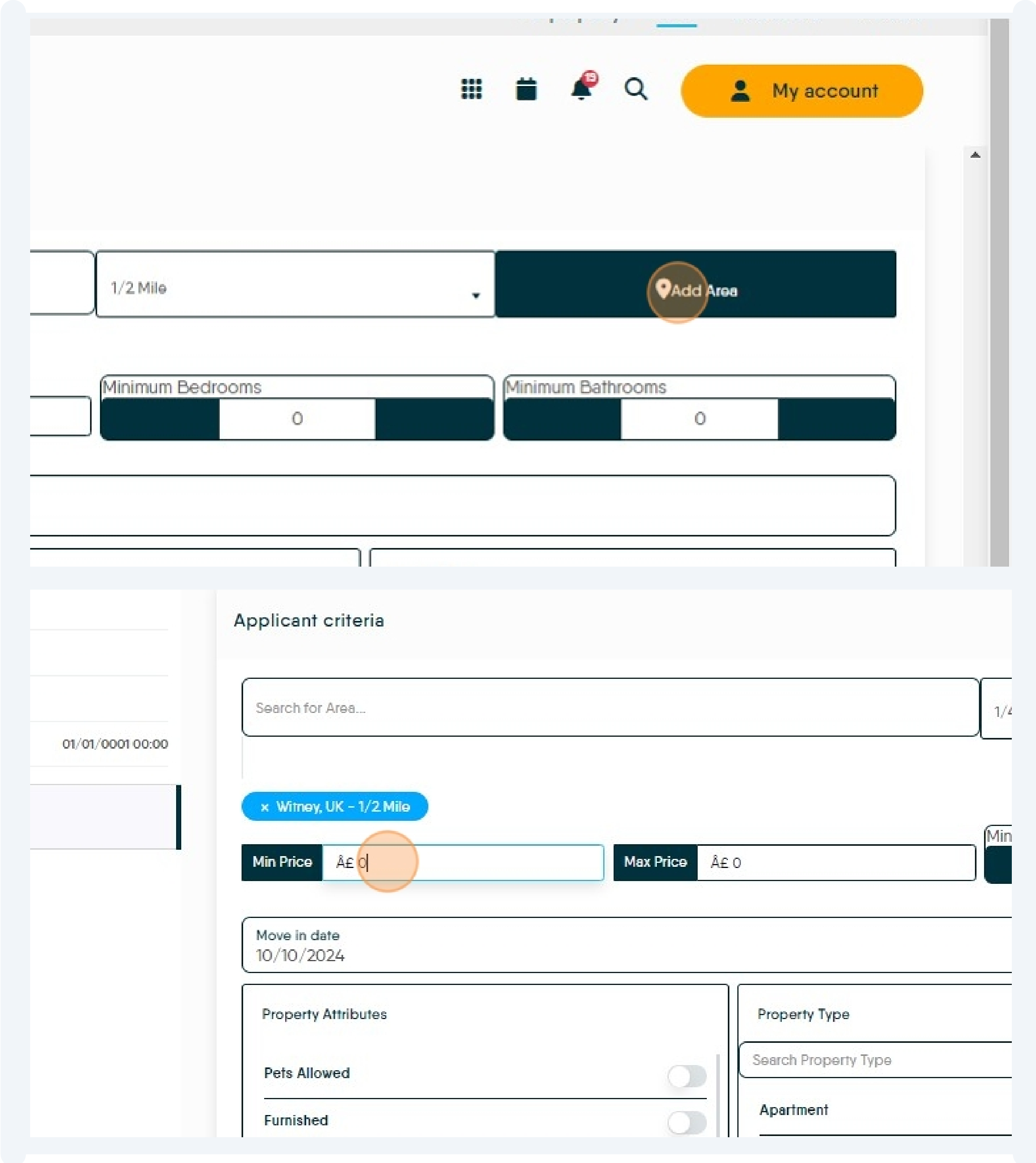
13 Next add the Applicant Criteria. This criteria supports the accurate matching of properties to applicants and vice versa.

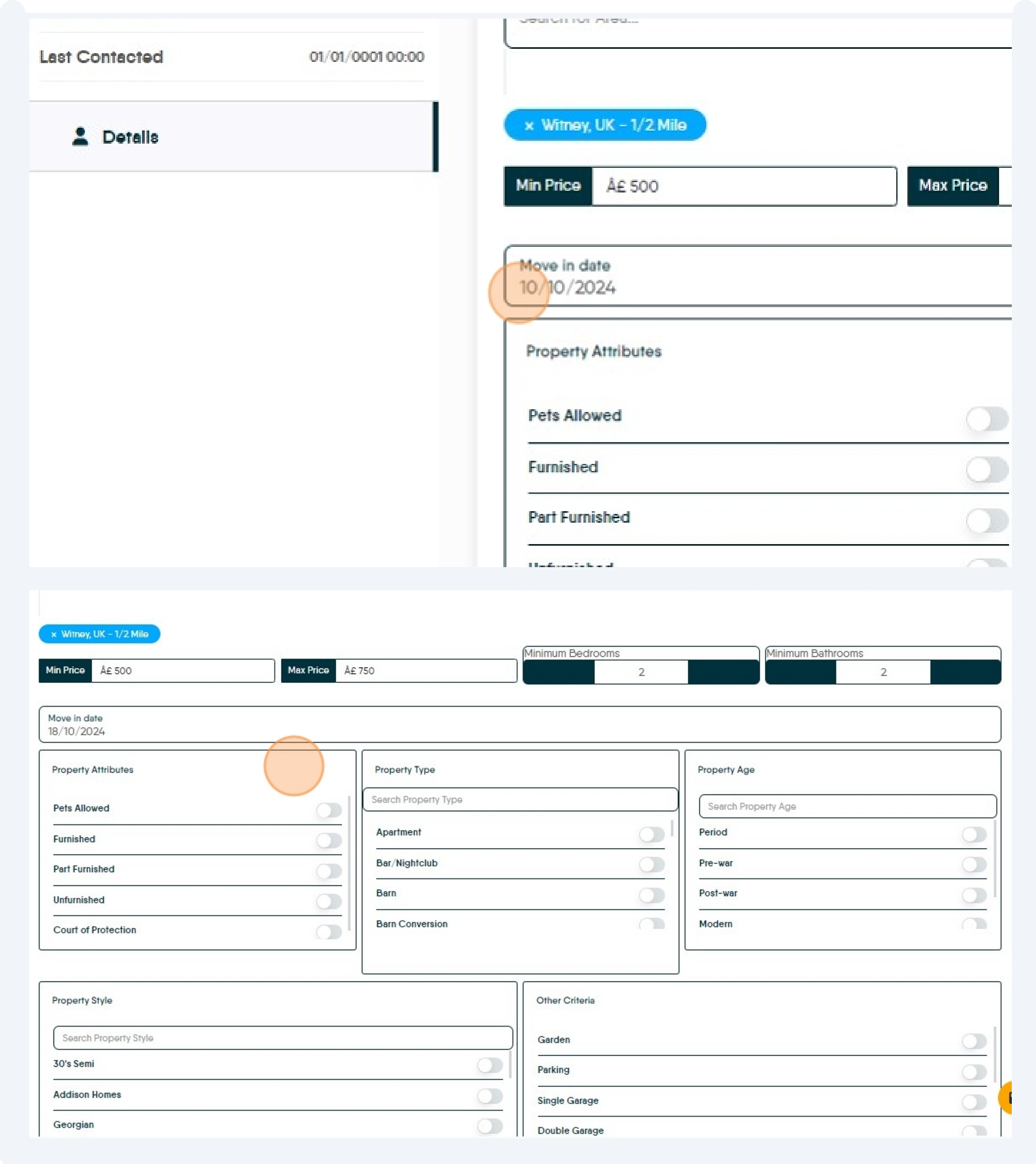
Click the "Search for Area..." field and add in the specific areas that the Applicant is looking to live in. This can be a for example a Town, Postcode, or Street Name. Then set a radius around that area that you want to search within. For example, click "1/4 Mile" to search an area of up to a quarter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


am property
My day
Lettings
Sales
Accounts
Reporting
Communications
ffer
£0.00
atus
nt Temp.
ntacted
01/01/0001 00:00
Details
Applicant criteria
Search for Area...
Min Price
Â£ 0
Max Price
Â£ 0
Move in date
10/10/2024


Communications
1/4 Mile
Max Price
Â£ 0
1/4 Mile
1/2 Mile
1 Mile
3 Miles
Minimum Bathroo

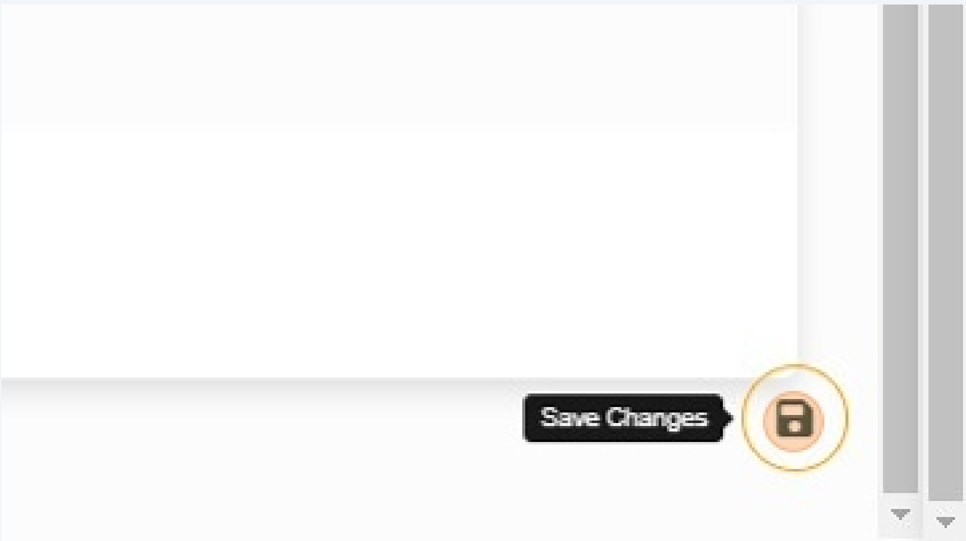

My account
1/2 Mile
Add Area
Minimum Bedrooms
0
Minimum Bathrooms
0
Applicant criteria
Search for Area...
01/01/0001 00:00
× Witney, UK - 1/2 Mile
Min Price
Â£ 0
Max Price
Â£ 0
Move in date
10/10/2024
Property Attributes
Pets Allowed
Furnished
Property Type
Search Property Type
Apartment


Last Contacted
01/01/0001 00:00
Details
× Witney, UK - 1/2 Mile
Min Price
Â£ 500
Max Price
Move in date
10/10/2024
Property Attributes
Pets Allowed
Furnished
Part Furnished
× Witney, UK - 1/2 Mile
Min Price
Â£ 500
Max Price
Â£ 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.

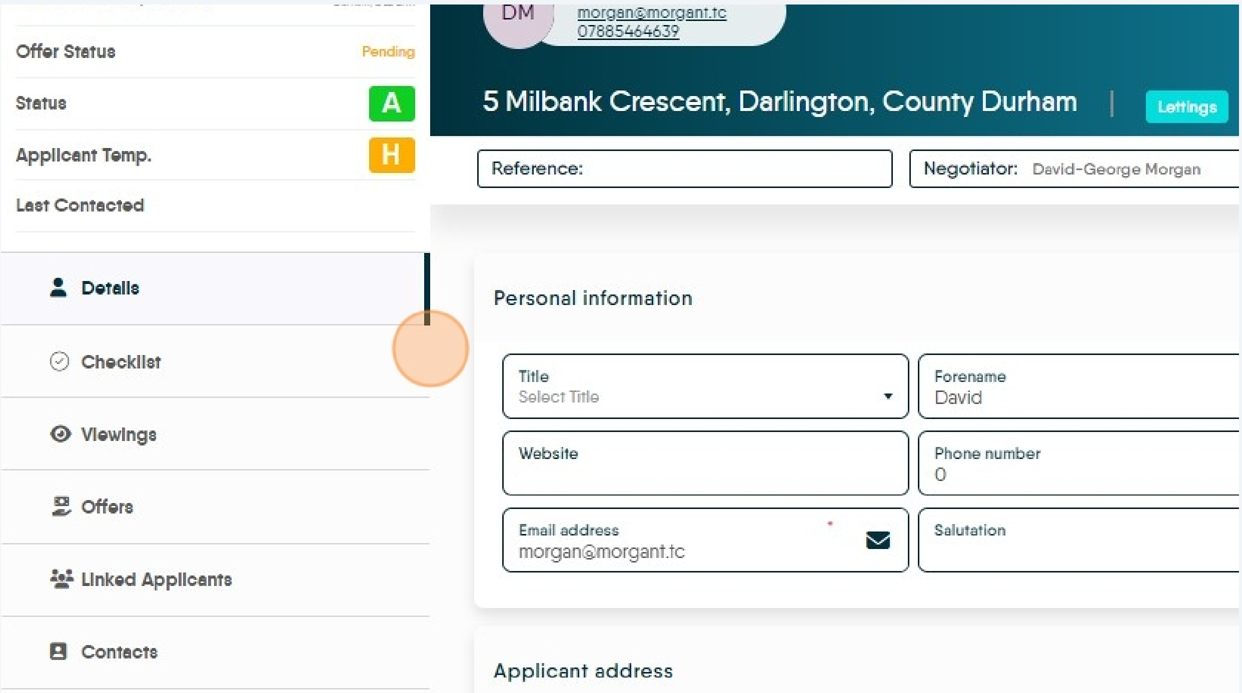
If you are using Core Process Simplification to add an applicant and create a viewing this is where the details in the additional information field will show.

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

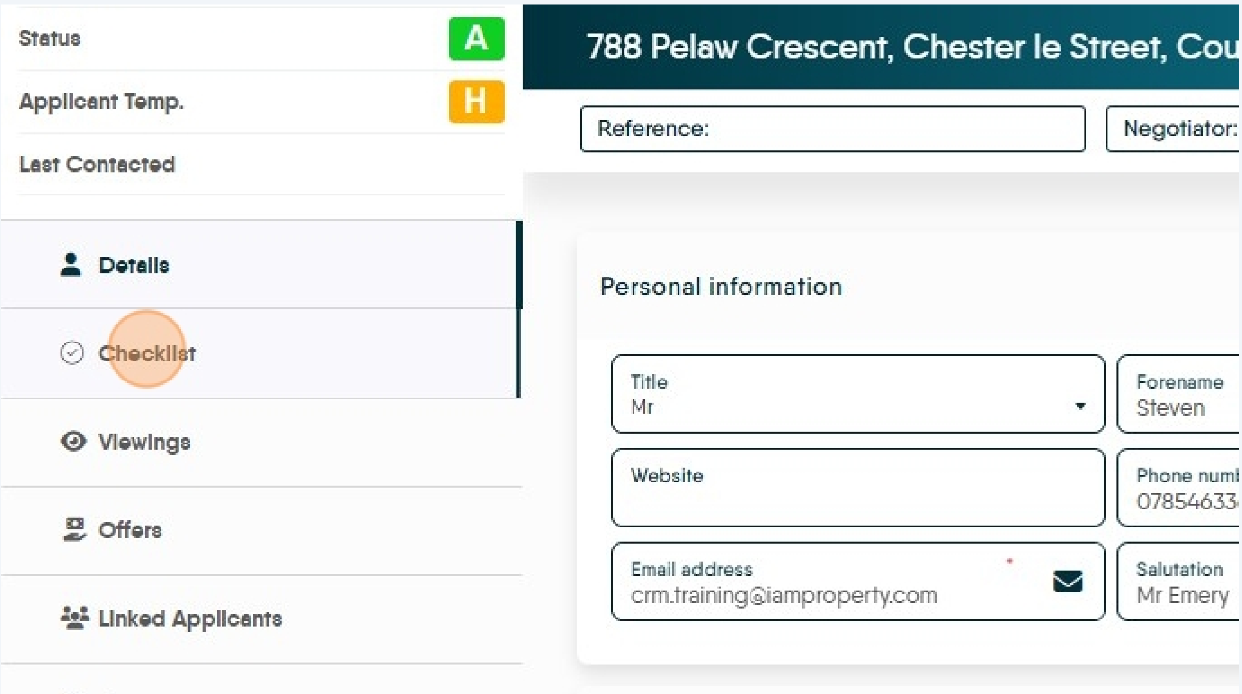


Tip! This is the basic Applicant Record created, for either Sales or Lettings applicants. The following options is dependent on settings that you have set for your agency, based on decisions that you have made.

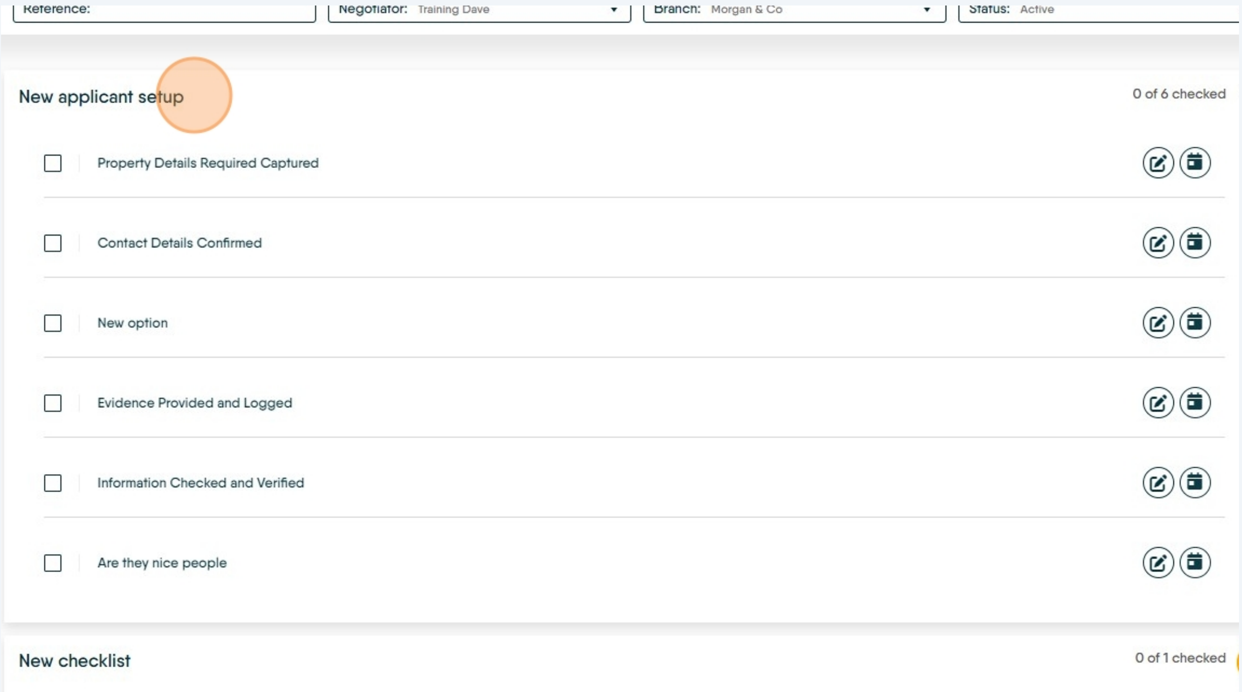
16 Once saved there will be a range of other options appear on the left side of the screen.



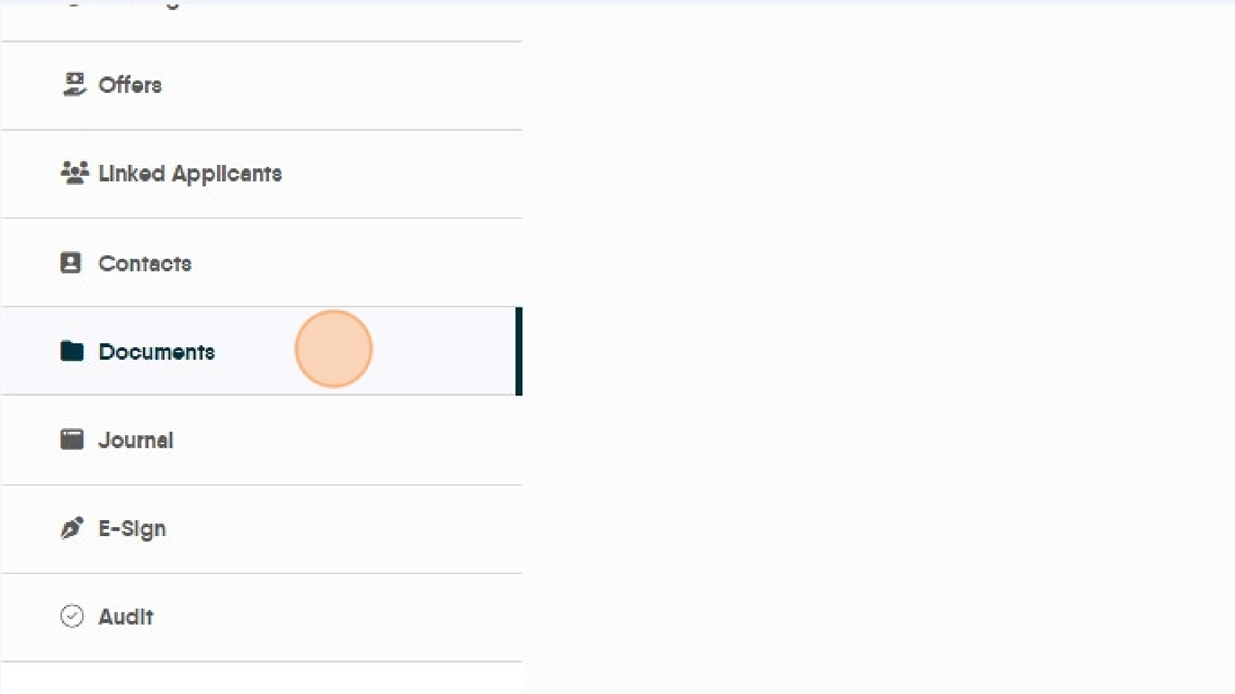
17 Click "Checklist". Checklists allow you to create an electronic version of a checklist that you use to check that processes are being followed.



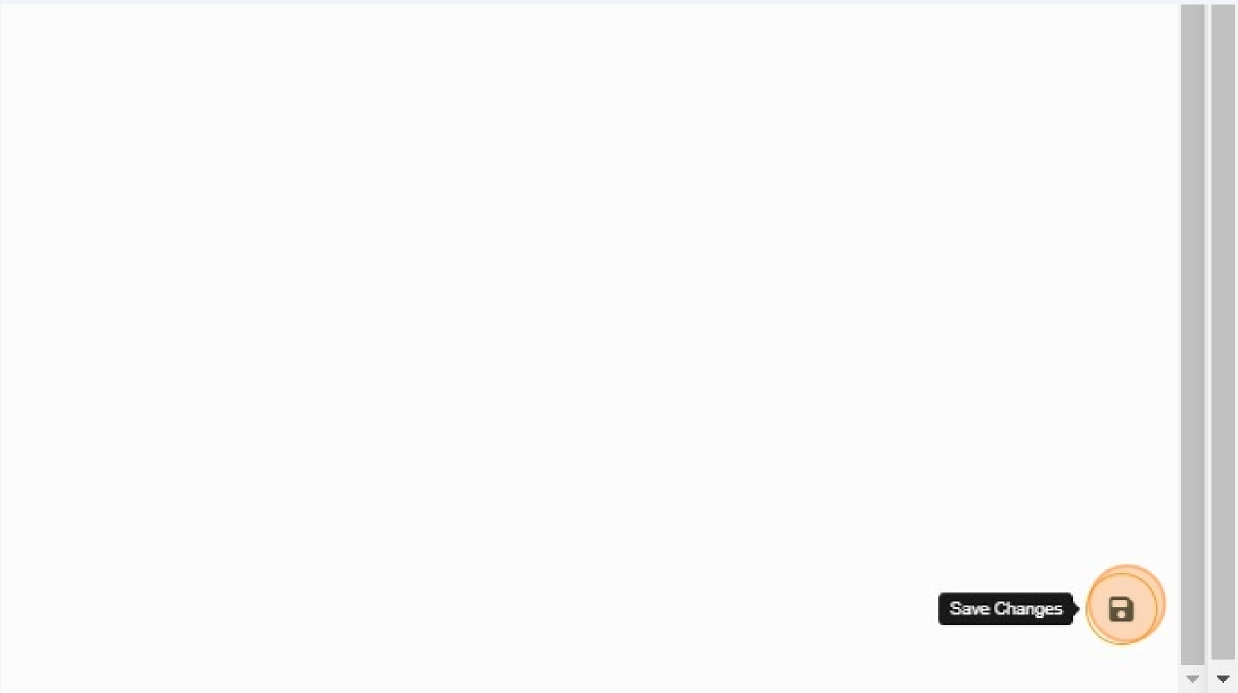
18 There can be multiple checklists per record. The items in a checklist can be 'ticked off' and a note of the date/time and the name of the person that completed that check is recorded. Notes and Completion dates can also be added, if a completion date is added, the checklist will also show on the appropriate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



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

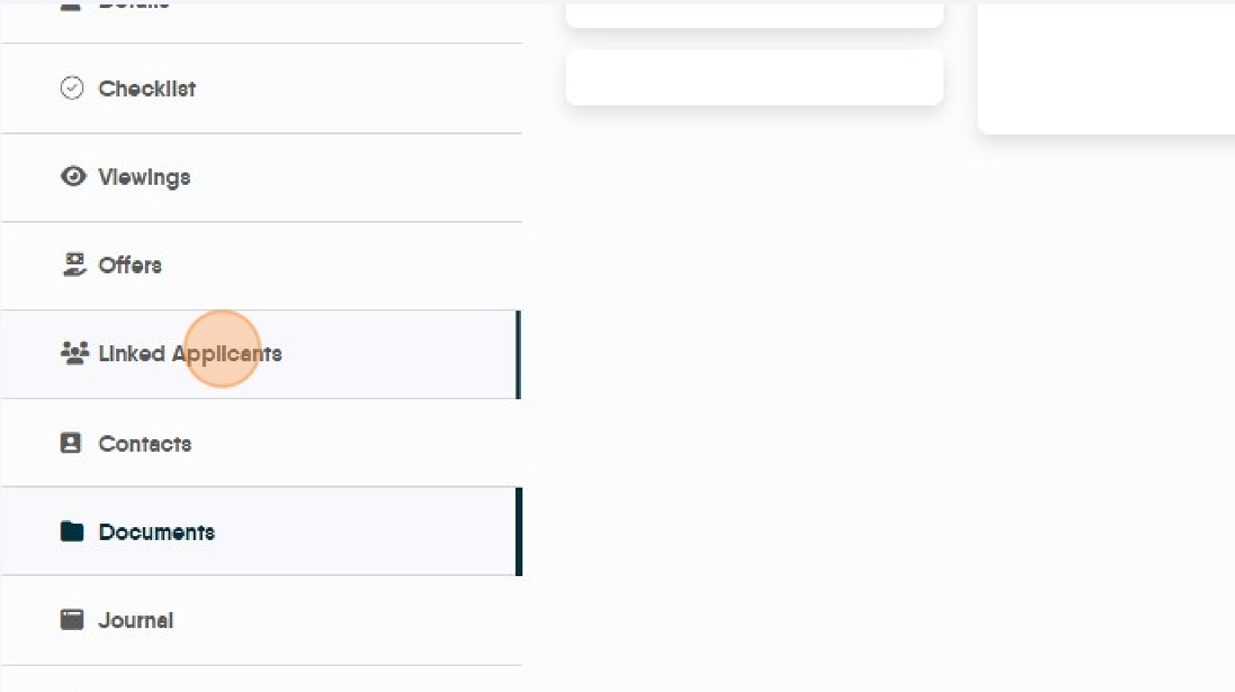


20 Don't forget to save as you go!

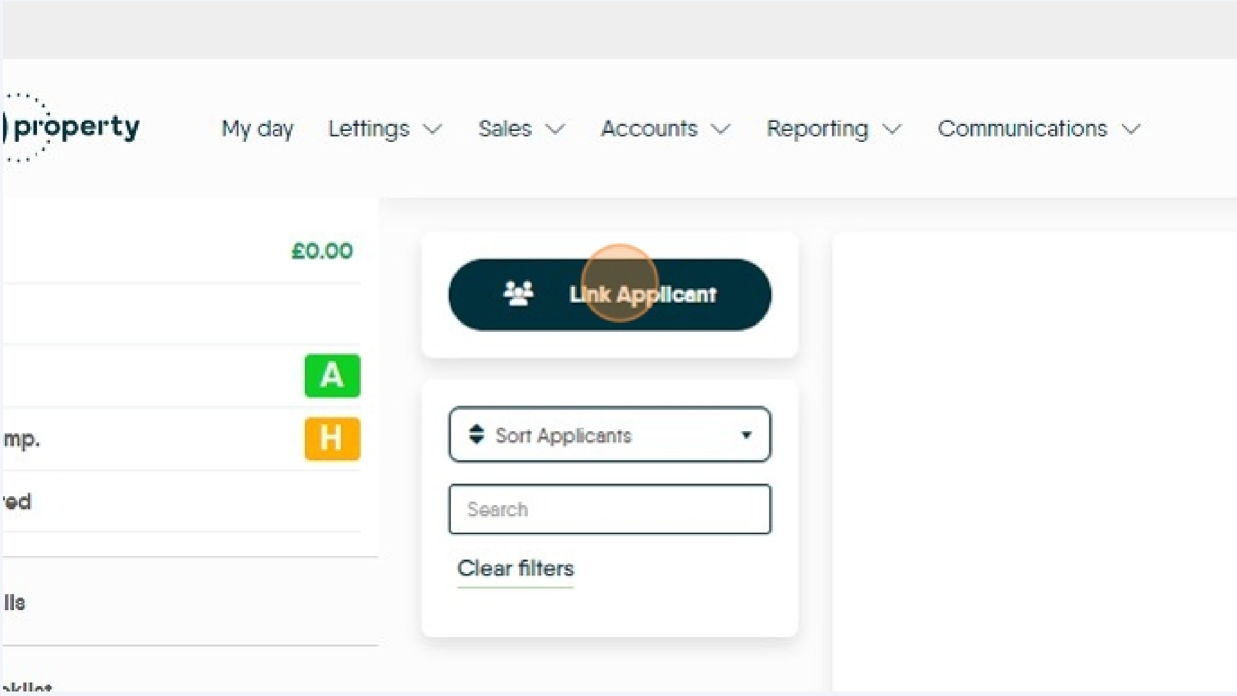


21 Complete all of the other screens as required.

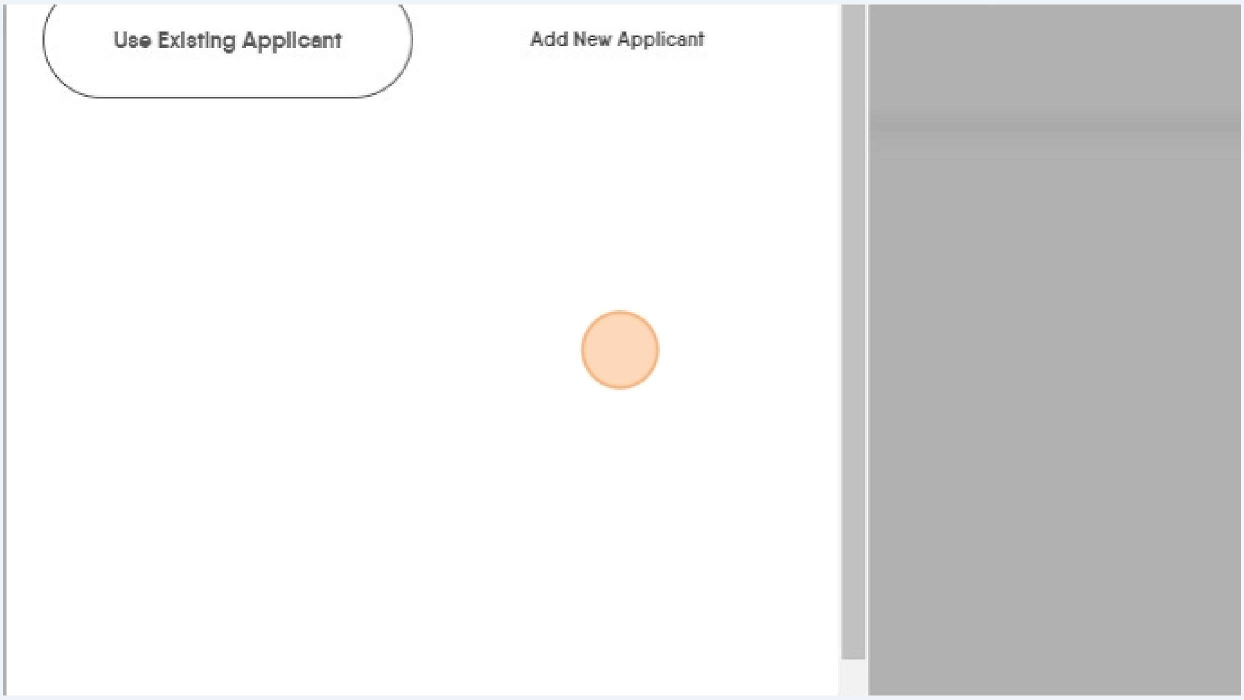
22 To add a second applicant, for example a Partner. Click "Linked Applicants"



23 Click "Link Applicant"

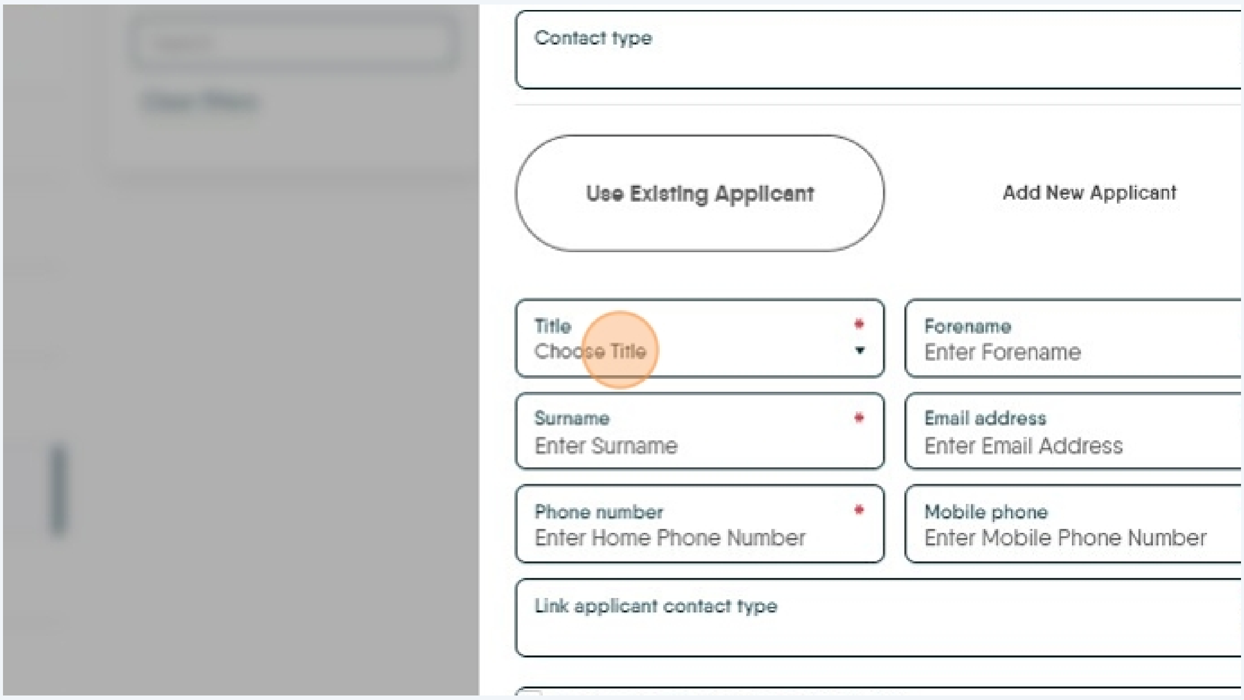


24 Click "Add New Applicant" to add a new applicant to the CRM or 'Use Existing...' to pick a record from within your CRM database.

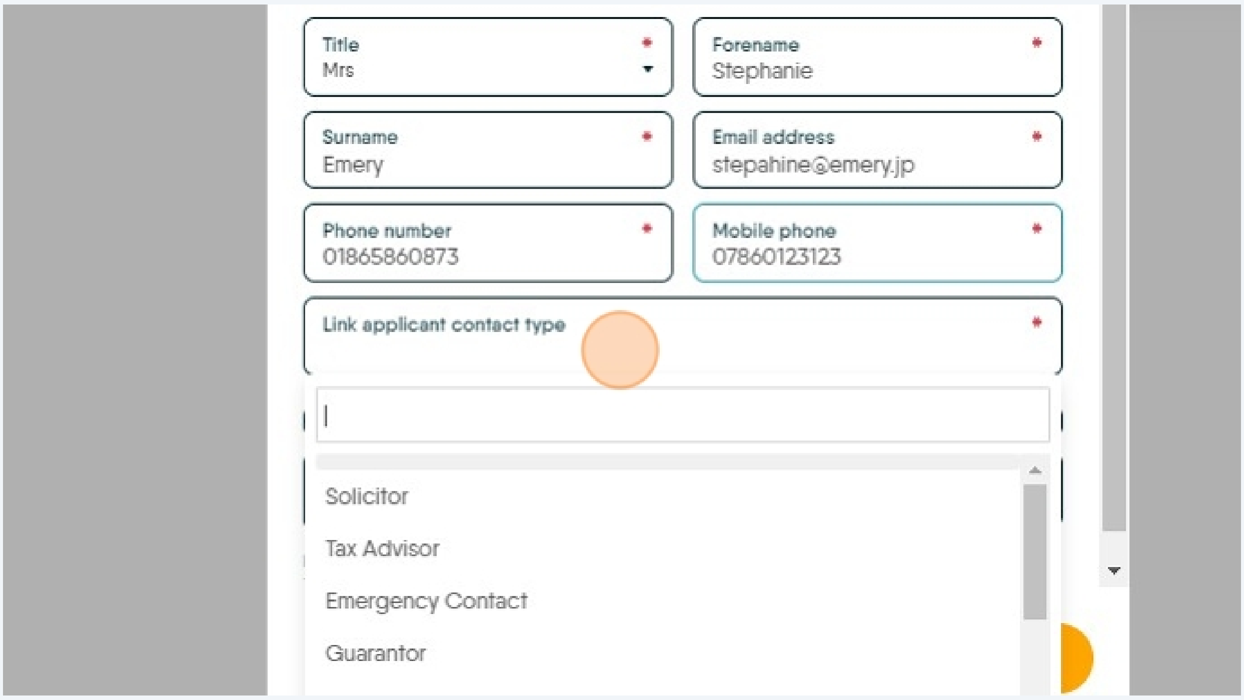


Tip! Make sure that when you do this, the applicant you are searching for is added to the same branch or, you have all your companies branches enabled in your configuration. To check this, click on the 'Bento menu' and select the 'Active Branches' option.

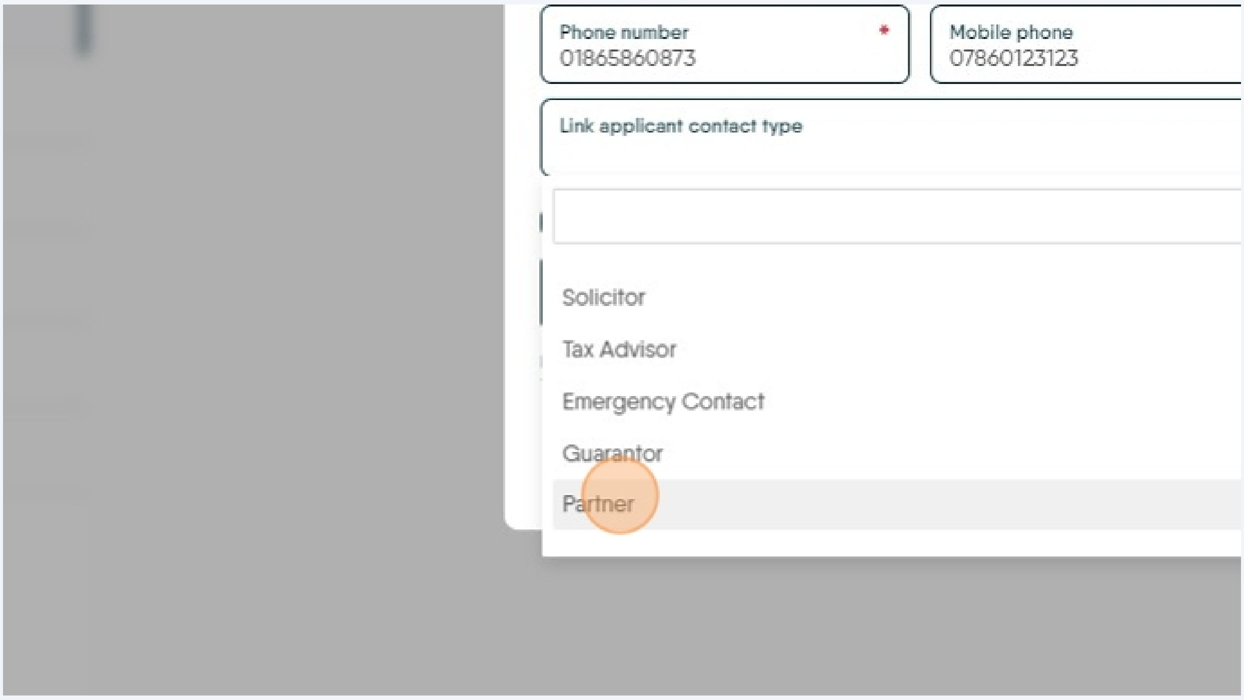
25 Adding New Applicant. Click "Choose Title" and then complete all the fields as required.



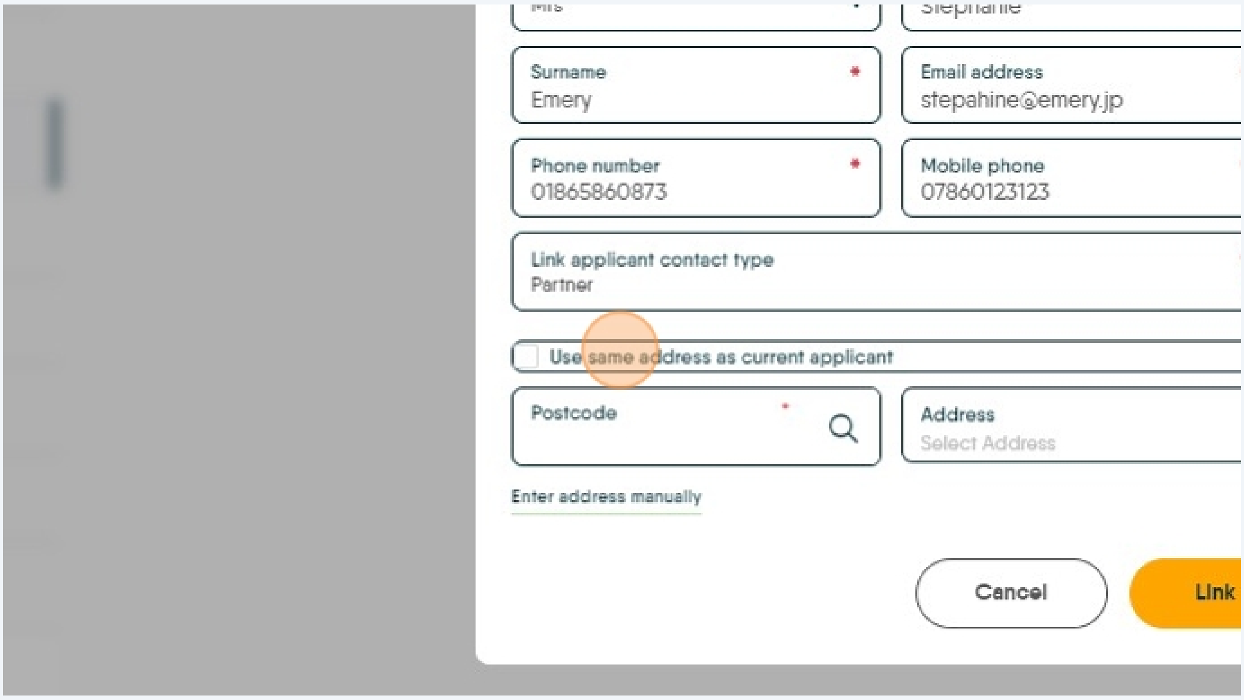
26 Set the '...Contact type' so the CRM can identify what the relationship is between the applicants.



27 For example click "Partner"

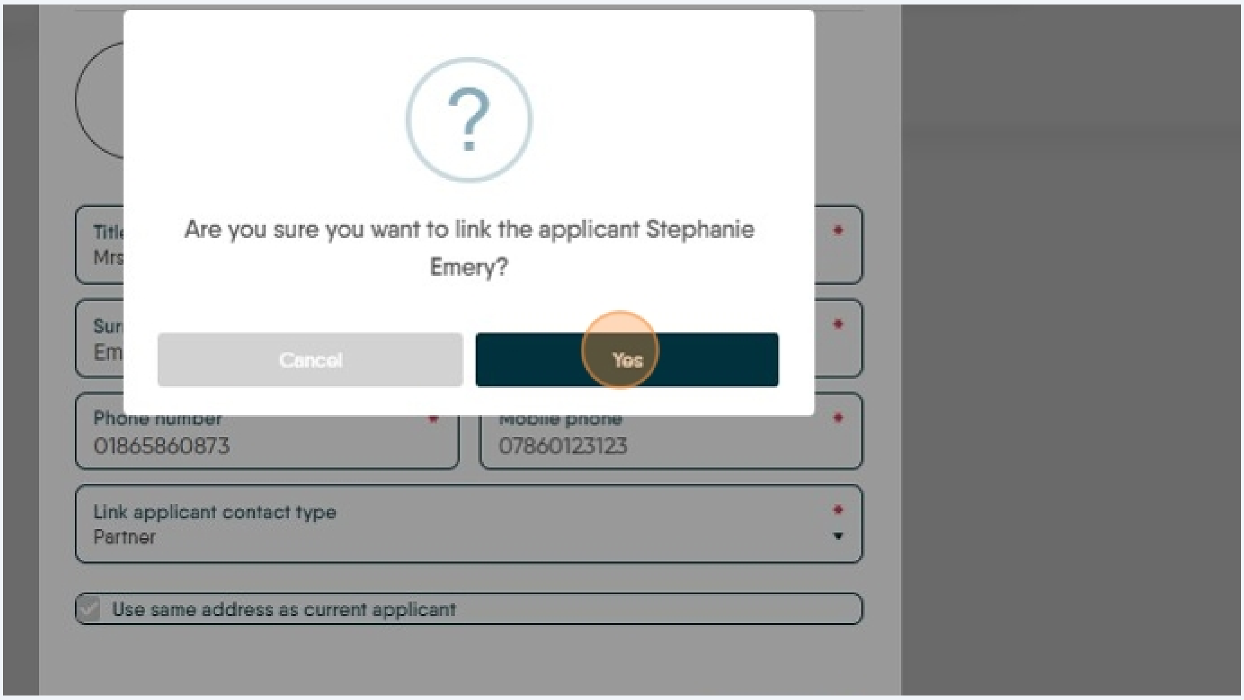


28 If the address is the same as Applicant 1 Click "Use same address as current applicant" if not, add the postcode and search as shown above.



29 Click "Link" to link the two applicants.

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.