

Adding a New Contact to an Existing Record in CRM

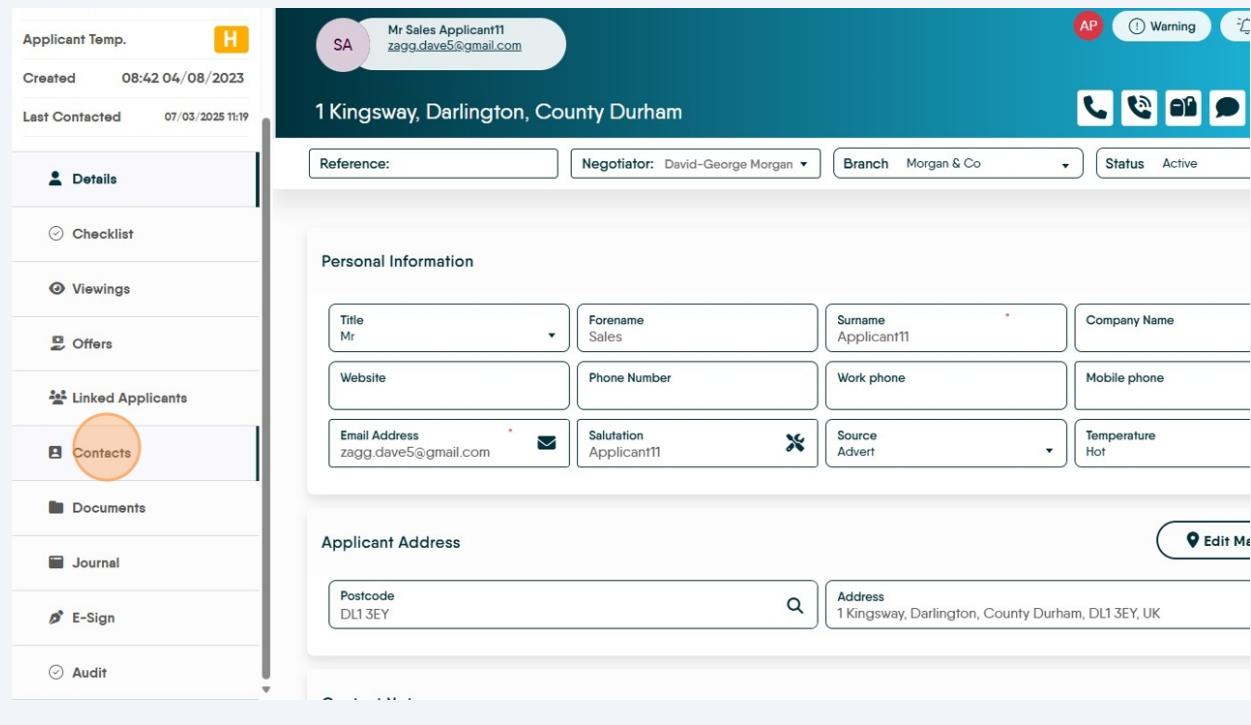


This guide provides a straightforward, step-by-step approach to adding a new contact in your CRM system, ensuring that you can efficiently manage your clients contacts. By following these detailed instructions, you can save time and avoid potential errors when entering important information. It's an essential resource for anyone looking to streamline their CRM processes and enhance their organisation skills.

- 1 Navigate to the Applicant/Landlord/Vendor/Tenant record you want to add a new contact to.

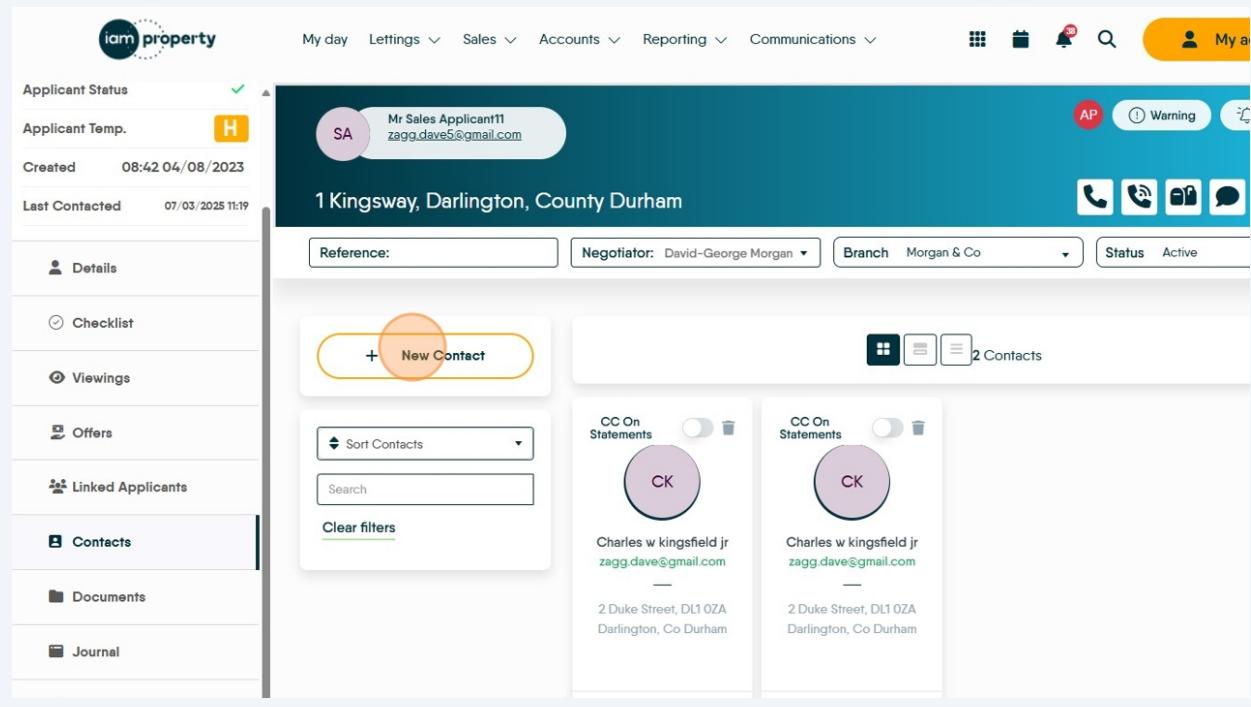
The screenshot shows the iam property CRM software interface. On the left, a sidebar lists various modules: Status, Temp., Contacted, Details, Checklist, Viewings, Offers, Linked Applicants, Contacts, Documents, Journal, and Sign. The main area displays a contact record for 'Mr Sales Applicant11' with the email 'zagg.dave5@gmail.com'. The contact is associated with the address '1 Kingsway, Darlington, County Durham'. The top navigation bar includes links for My day, Lettings, Sales, Accounts, Reporting, Communications, and a 'My account' dropdown. The header also shows the current date and time (08:42 04/08/2023) and a warning message. The contact details form includes fields for Reference, Negotiator (set to 'David-George Morgan'), Branch (set to 'Morgan & Co'), Status (set to 'Active'), and various personal information fields like Title (Mr), Forename (Sales), Surname (Applicant11), Company Name, Website, Phone Number, Work phone, Mobile phone, Email Address (zagg.dave5@gmail.com), Salutation (Applicant11), Source (Advert), and Temperature (Hot). There is also an 'Edit Manually' button for the address section.

2 Click "Contacts"



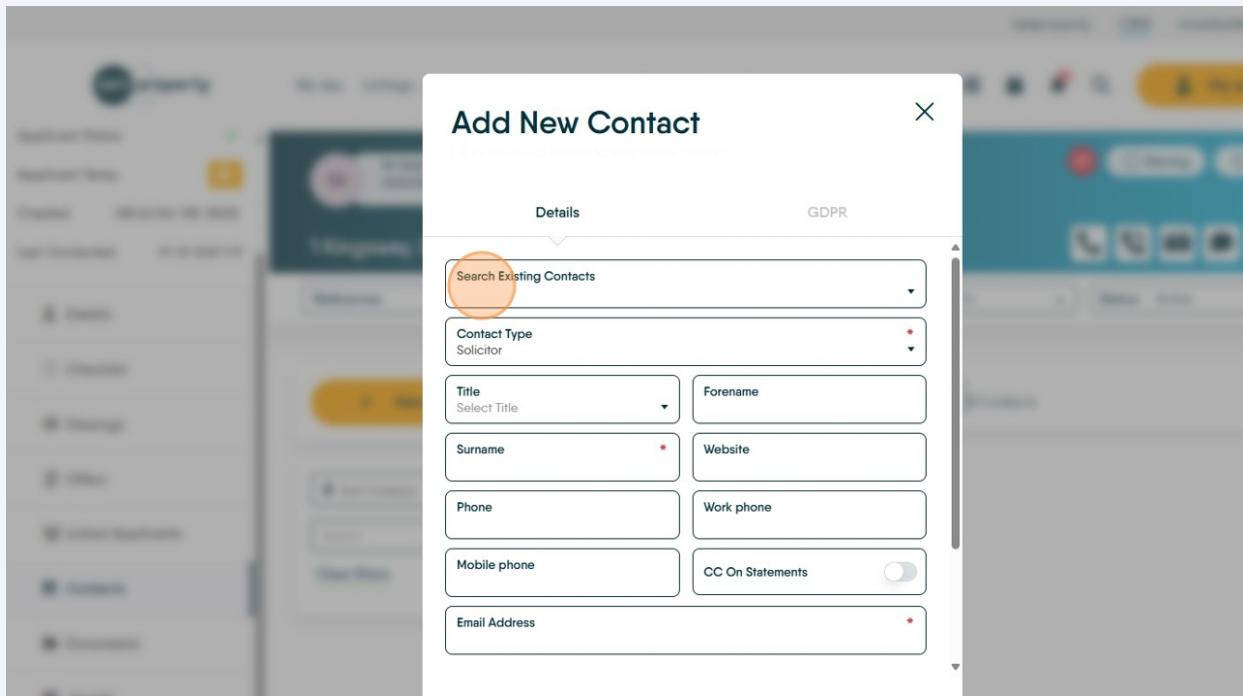
The screenshot shows the software interface for managing an applicant. The top bar displays the applicant's name, Mr Sales Applicant11, and email, zagg.dave5@gmail.com. The status is marked with a yellow 'H' and a red 'AP' warning icon. The main content area is titled '1 Kingsway, Darlington, County Durham'. On the left, a sidebar lists various tabs: Details, Checklist, Viewings, Offers, Linked Applicants, **Contacts** (which is highlighted with an orange circle), Documents, Journal, E-Sign, and Audit. The 'Contacts' tab is currently active. The main panel shows 'Personal Information' fields for Title (Mr), Forename (Sales), Surname (Applicant11), Company Name, Website, Phone Number, Work phone, Mobile phone, Email Address (zagg.dave5@gmail.com), Salutation (Applicant11), Source (Advert), and Temperature (Hot). Below this is the 'Applicant Address' section with Postcode (DL1 3EY) and Address (1 Kingsway, Darlington, County Durham, DL1 3EY, UK). A 'Edit Me' button is located in the top right of the address section.

3 Click "New Contact"

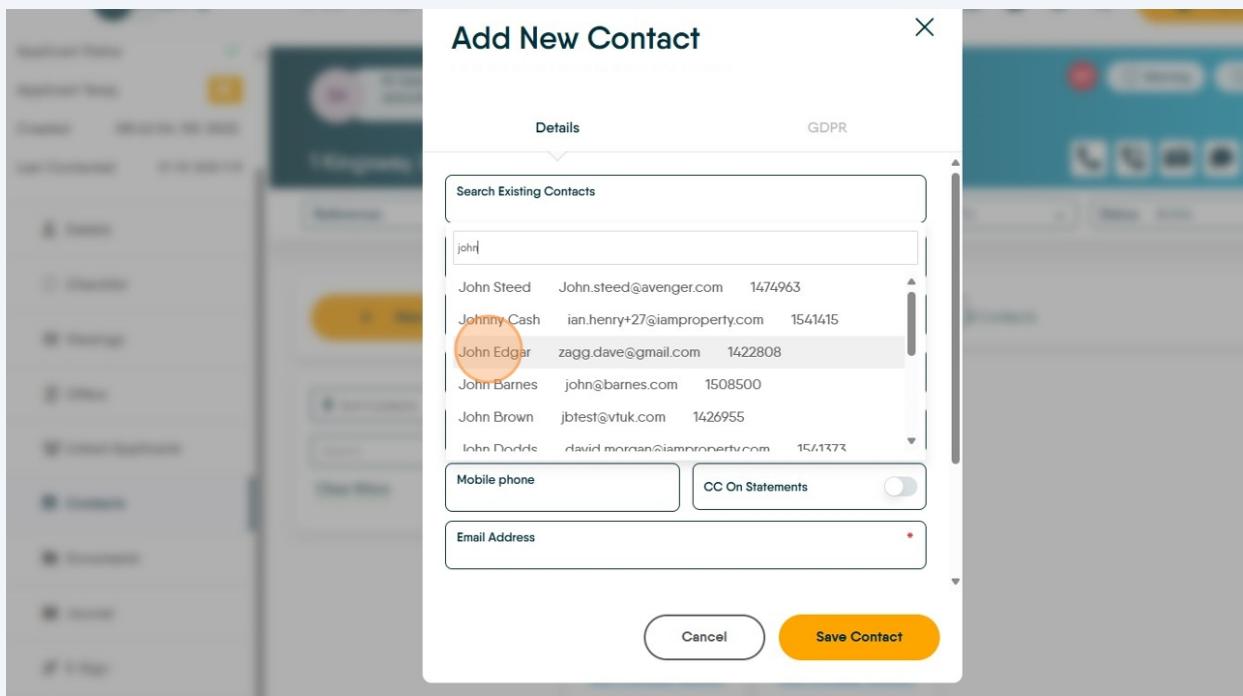


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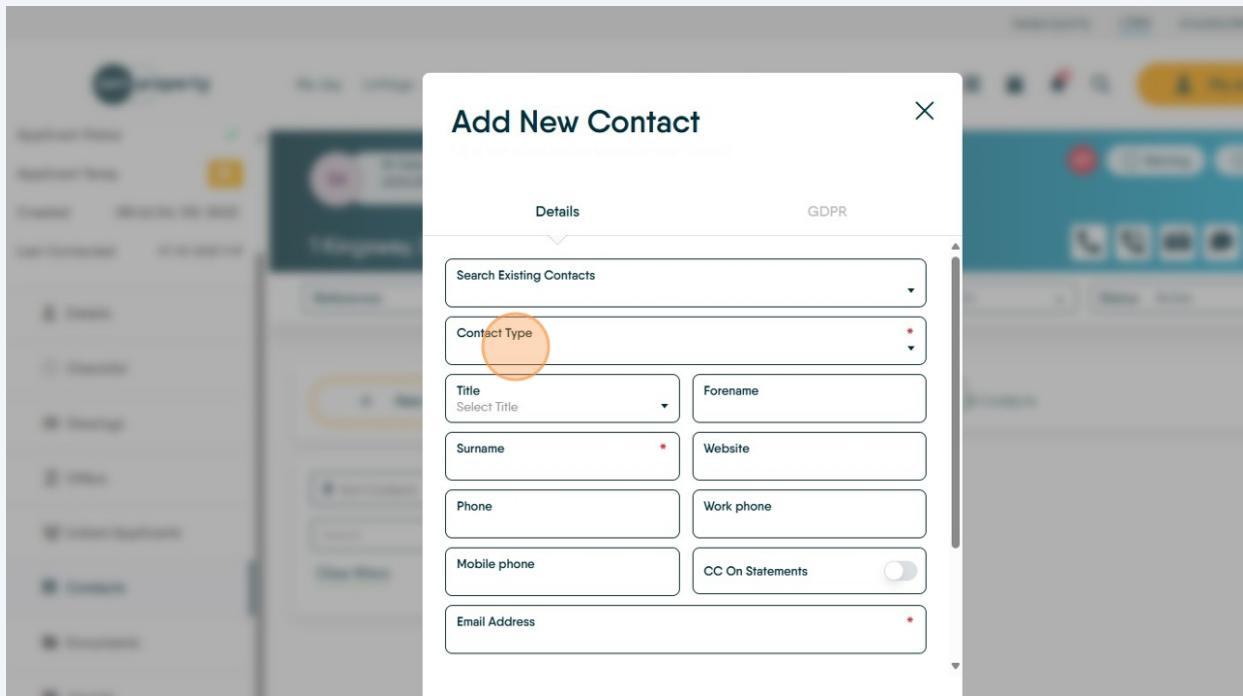
4 Click here and search if you are picking an existing contact e.g. a Solicitor



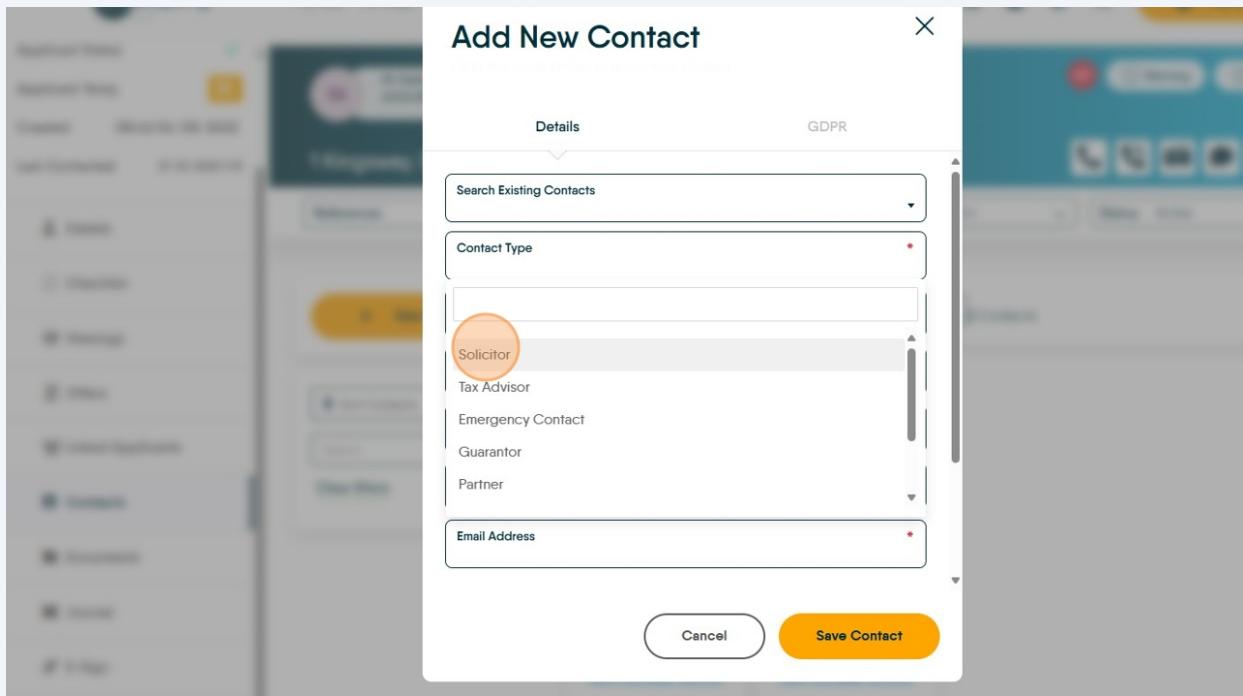
5 Type the name of the Contact you are searching for and select from the drop down menu.



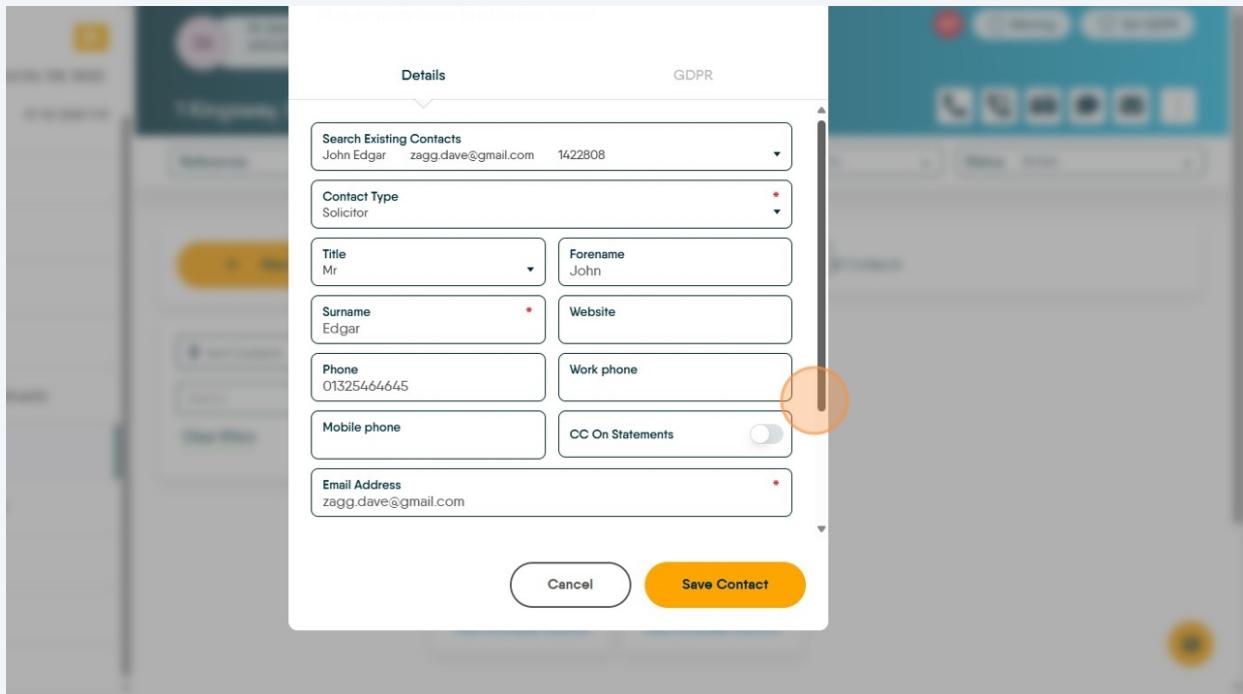
6 If you are adding a new Contact. Click here.



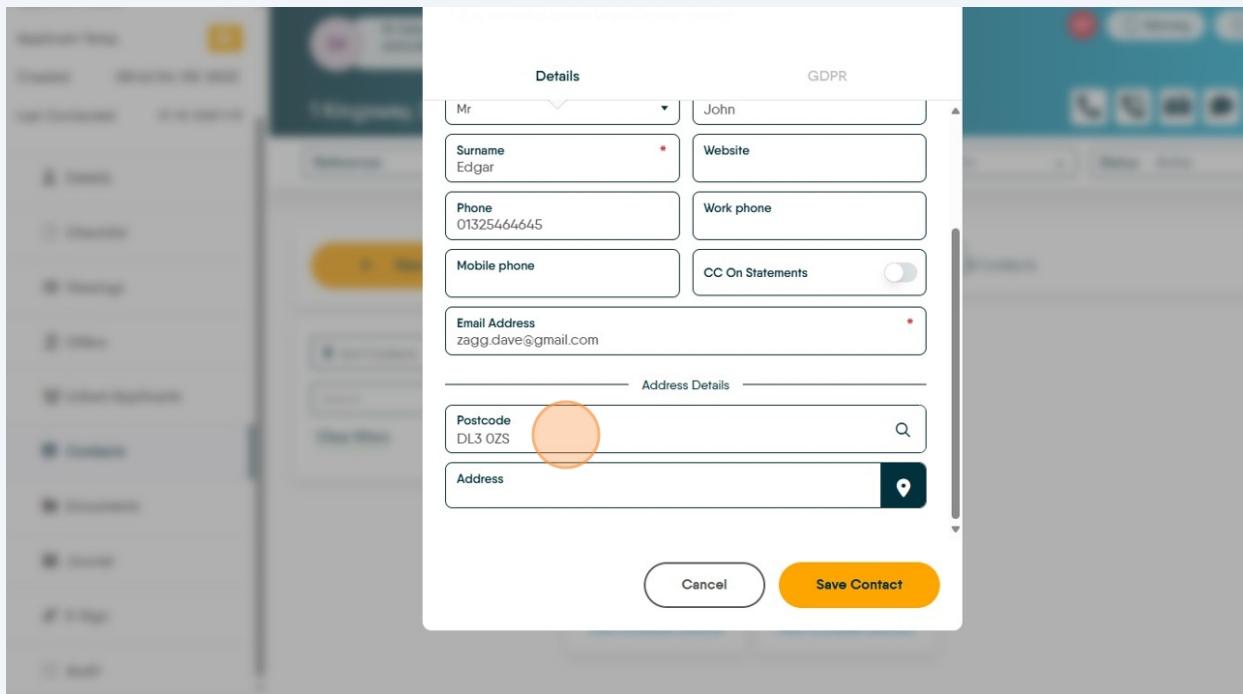
7 Select the Contact type from the drop down menu, for example click "Solicitor"



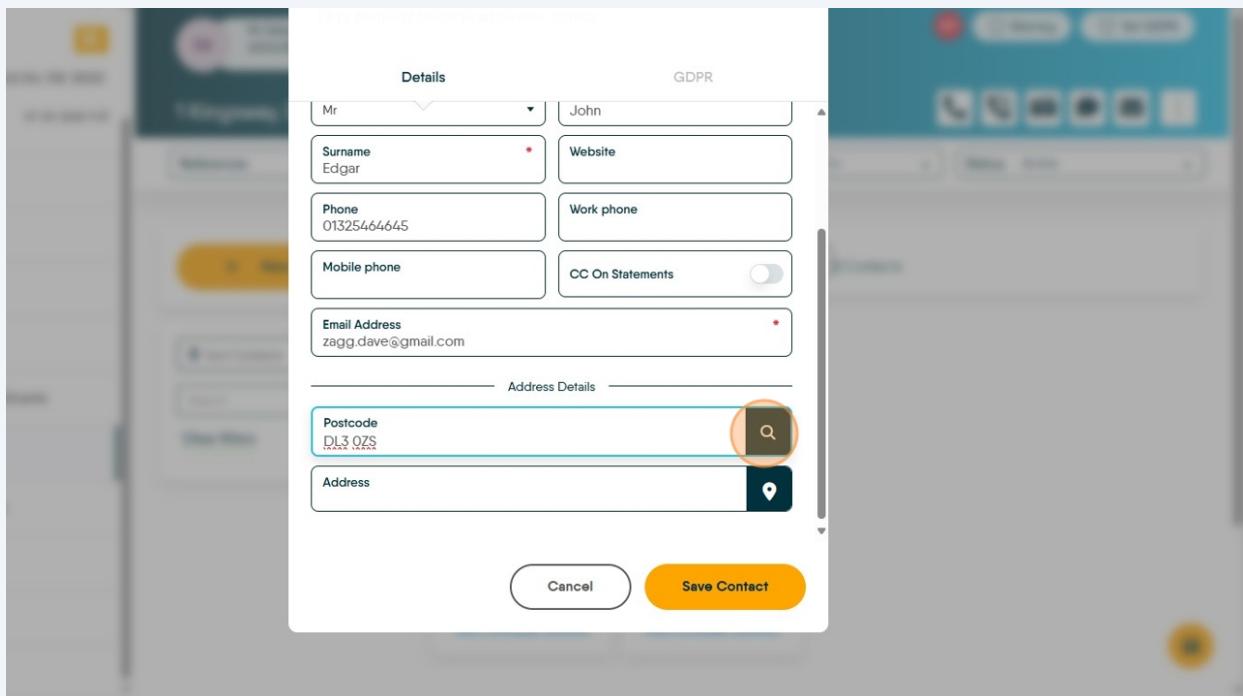
8 Complete all the fields



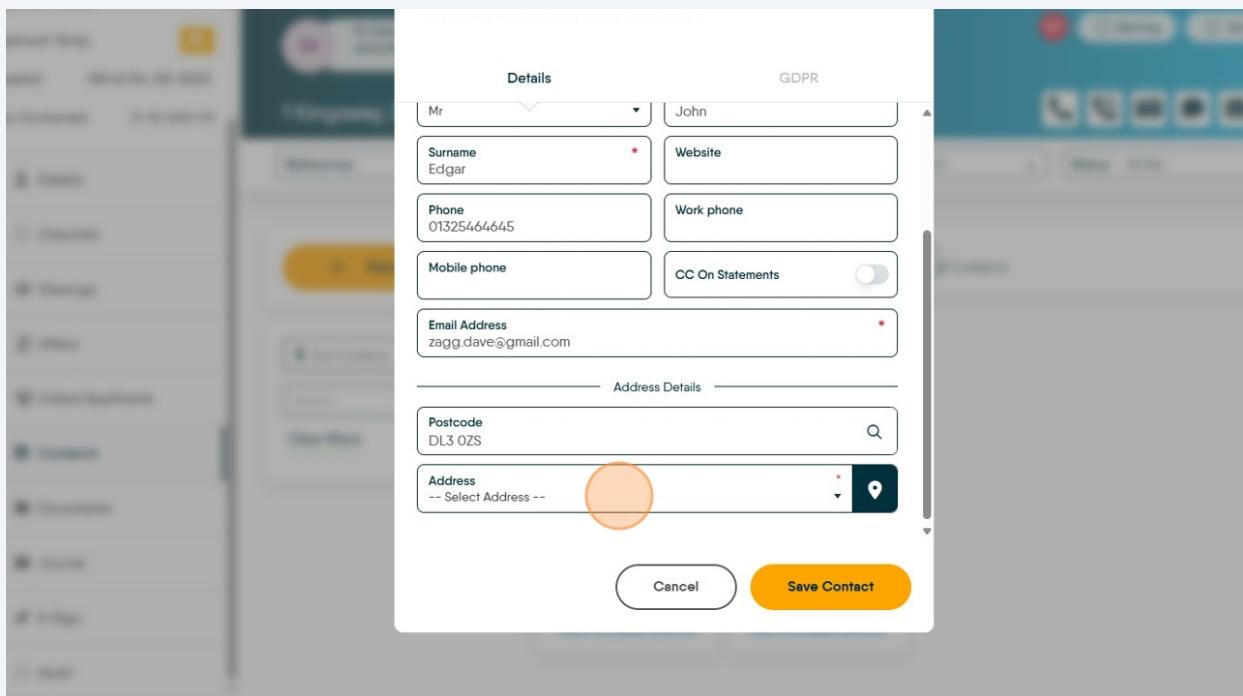
9 Click this field and add the postcode if you have it.



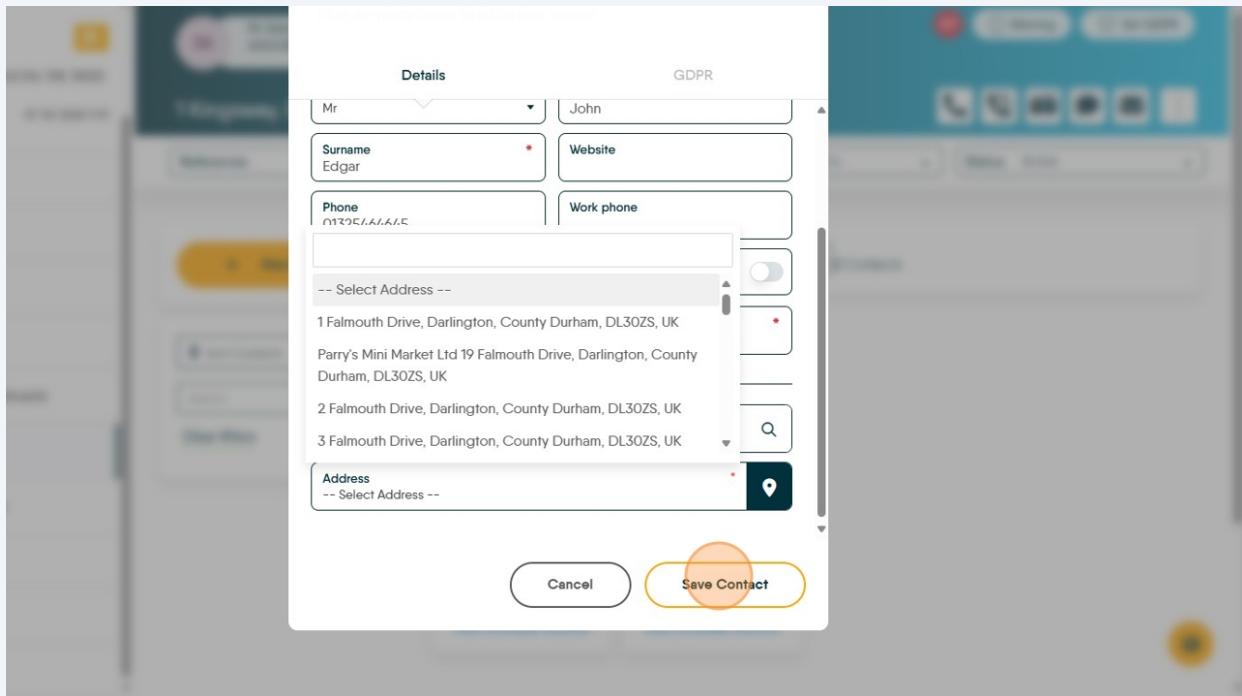
10 Click here to search.



11 Click "-- Select Address --" to find the contact.

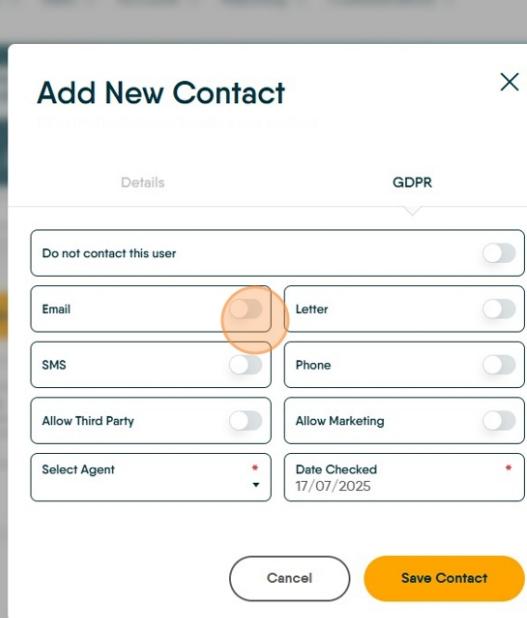
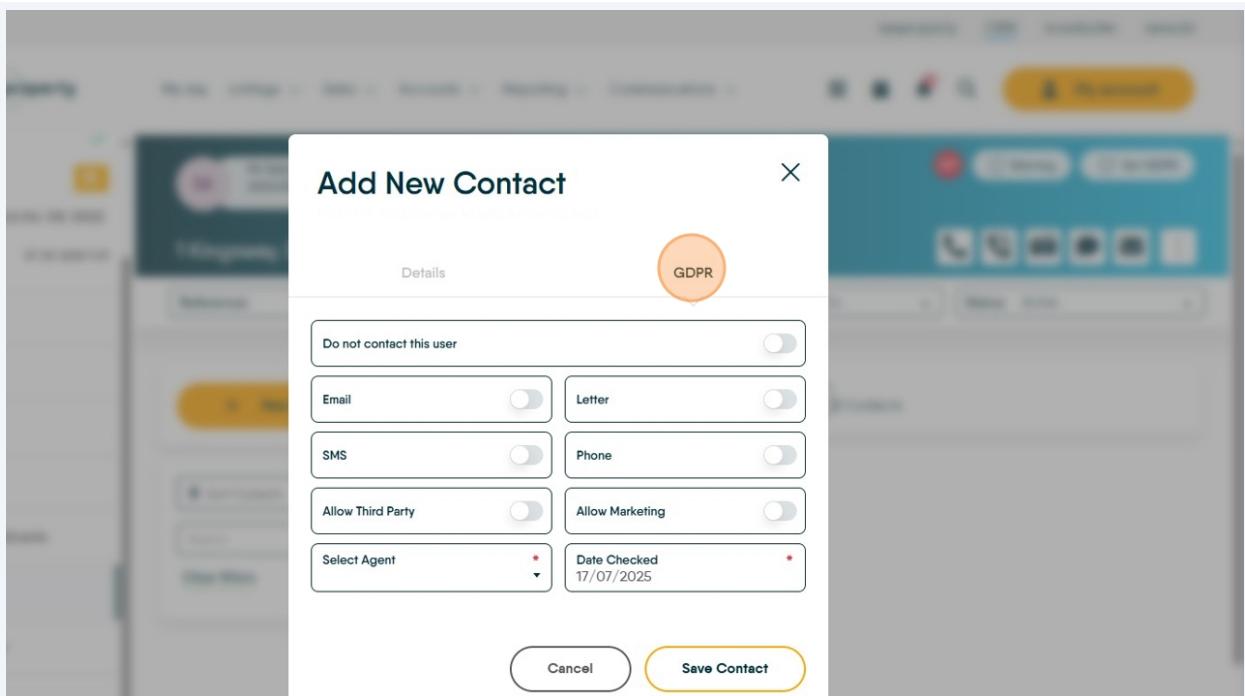


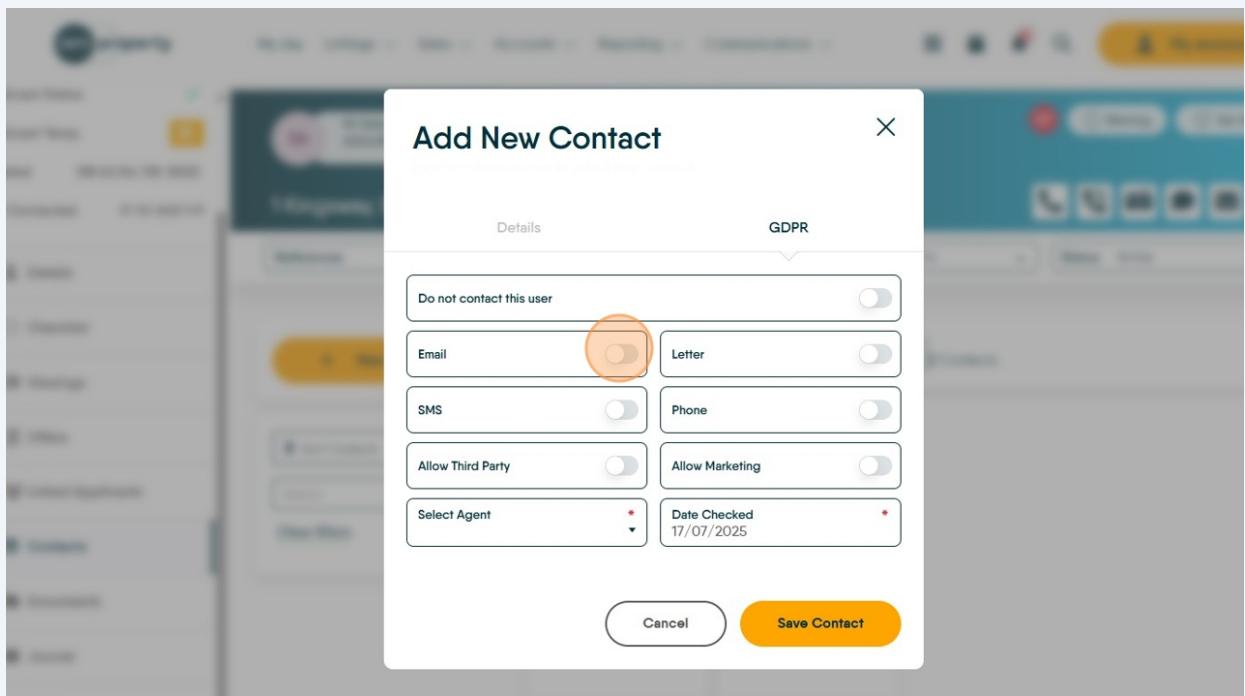
12 Click "Save Contact"



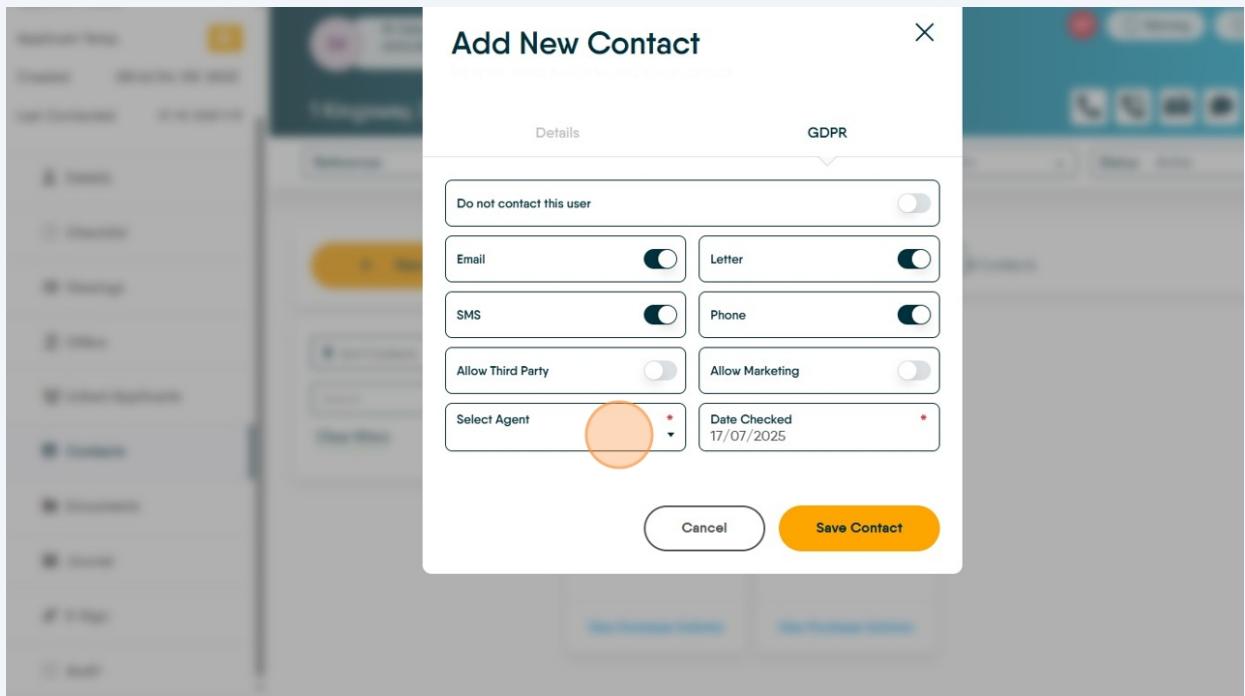
Alert! At this point you may be asked to update the GDPR information for the contact and add the negotiator details.

13 Click "GDPR" select all the options as appropriate to your company policy.





14 Click here to select the Negotiator from the drop down list.



15 Click "Save Contact"

