

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.

iam property

My day Lettings Sales Accounts Reporting Communications

My account

if Status

if Temp. 08:42 04/08/2023

tacted 07/03/2025 11:19

Details

Checklist

Viewings

Offers

Linked Applicants

Contacts

Documents

Journal

Sign

Mr Sales Applicant11
zagg.dave5@gmail.com

AP Warning Set GDPR

1 Kingsway, Darlington, County Durham

Reference: Negotiator: David-George Morgan Branch: Morgan & Co Status: Active

Personal Information

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 Temperature Hot

Applicant Address

Postcode DL1 3EY Address 1 Kingsway, Darlington, County Durham, DL1 3EY, UK

Edit Manually

2 Click "Contacts"

Applicant Temp. H

Created 08:42 04/08/2023

Last Contacted 07/03/2025 11:19

Details

Checklist

Viewings

Offers

Linked Applicants

Contacts

Documents

Journal

E-Sign

Audit

SA Mr Sales Applicant11
zagg.dave5@gmail.com

AP Warning

1 Kingsway, Darlington, County Durham

Reference: Negotiator: David-George Morgan Branch: Morgan & Co Status: Active

Personal Information

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	Temperature Hot

Applicant Address

Postcode DL1 3EY Address 1 Kingsway, Darlington, County Durham, DL1 3EY, UK

3 Click "New Contact"

iam property

My day Lettings Sales Accounts Reporting Communications

Applicant Status ✓

Applicant Temp. H

Created 08:42 04/08/2023

Last Contacted 07/03/2025 11:19

Details

Checklist

Viewings

Offers

Linked Applicants

Contacts

Documents

Journal

SA Mr Sales Applicant11
zagg.dave5@gmail.com

AP Warning

1 Kingsway, Darlington, County Durham

Reference: Negotiator: David-George Morgan Branch: Morgan & Co Status: Active

+ New Contact

Sort Contacts

Search

Clear filters

CC On Statements

Charles w kingsfield jr
zagg.dave@gmail.com

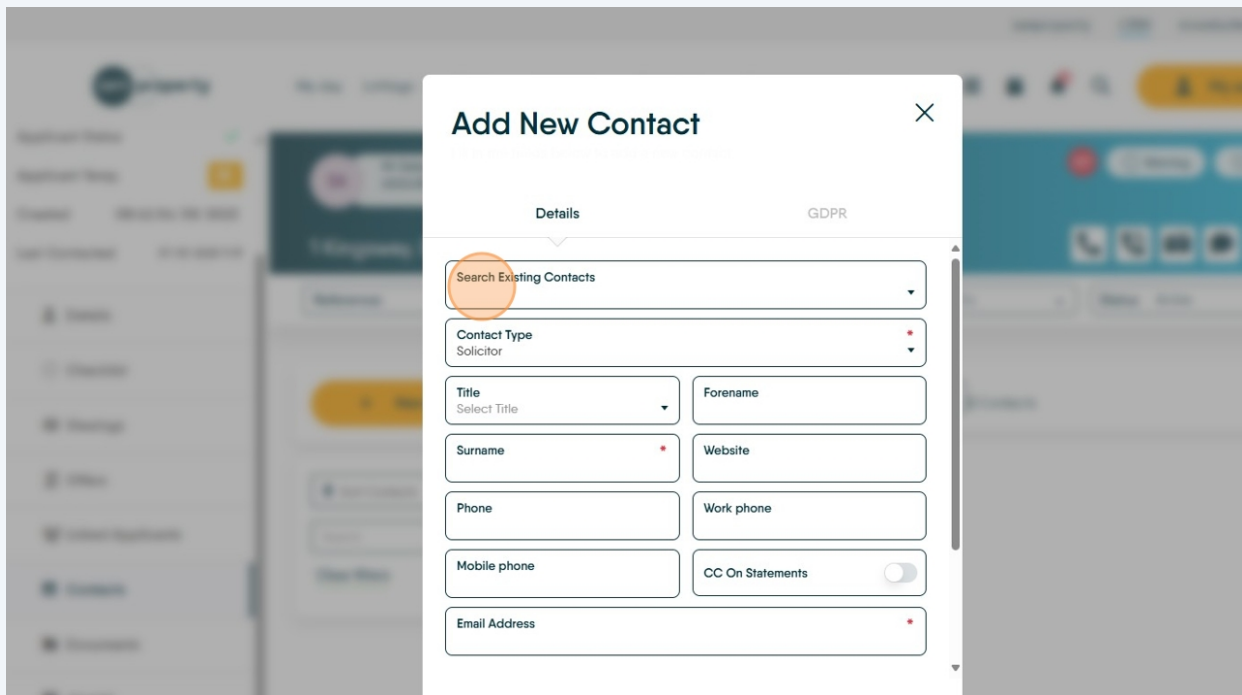
2 Duke Street, DL1 0ZA
Darlington, Co Durham

CC On Statements

Charles w kingsfield jr
zagg.dave@gmail.com

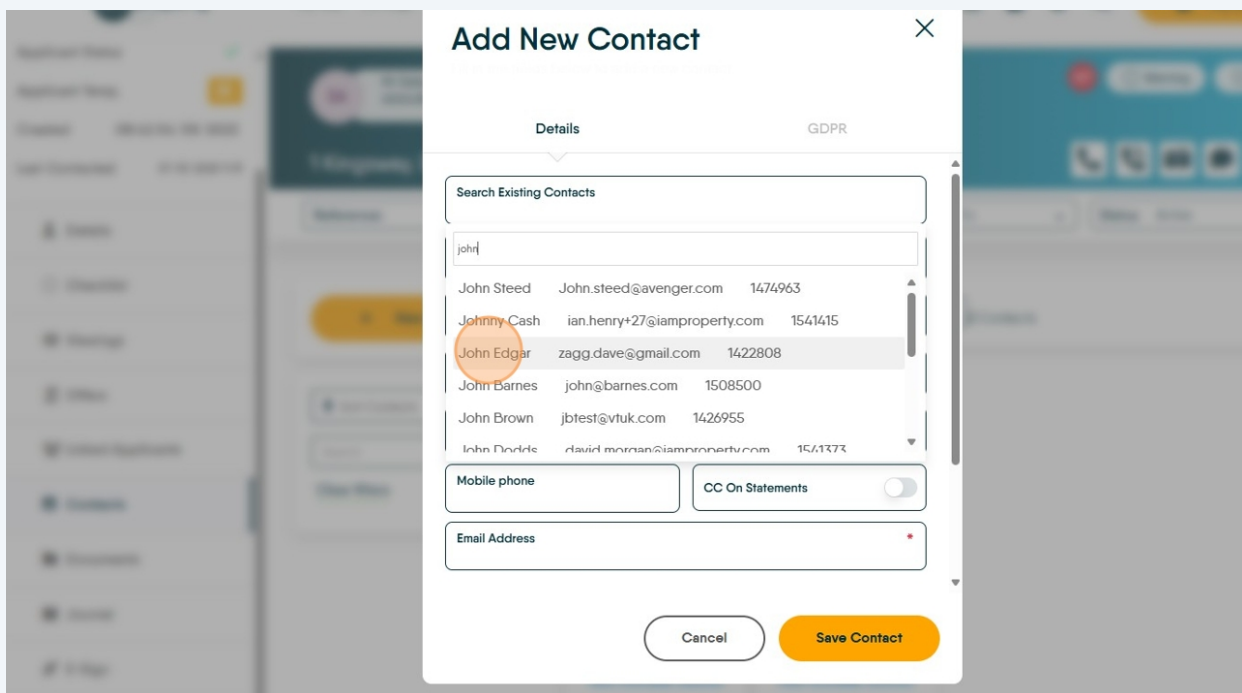
2 Duke Street, DL1 0ZA
Darlington, Co Durham

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



The screenshot shows the 'Add New Contact' modal window. The 'Details' tab is active. The 'Search Existing Contacts' dropdown menu is highlighted with an orange circle. Below it, the 'Contact Type' is set to 'Solicitor'. Other fields include 'Title' (Select Title), 'Forename', 'Surname', 'Website', 'Phone', 'Work phone', 'Mobile phone', 'CC On Statements' (toggle), and 'Email Address'.

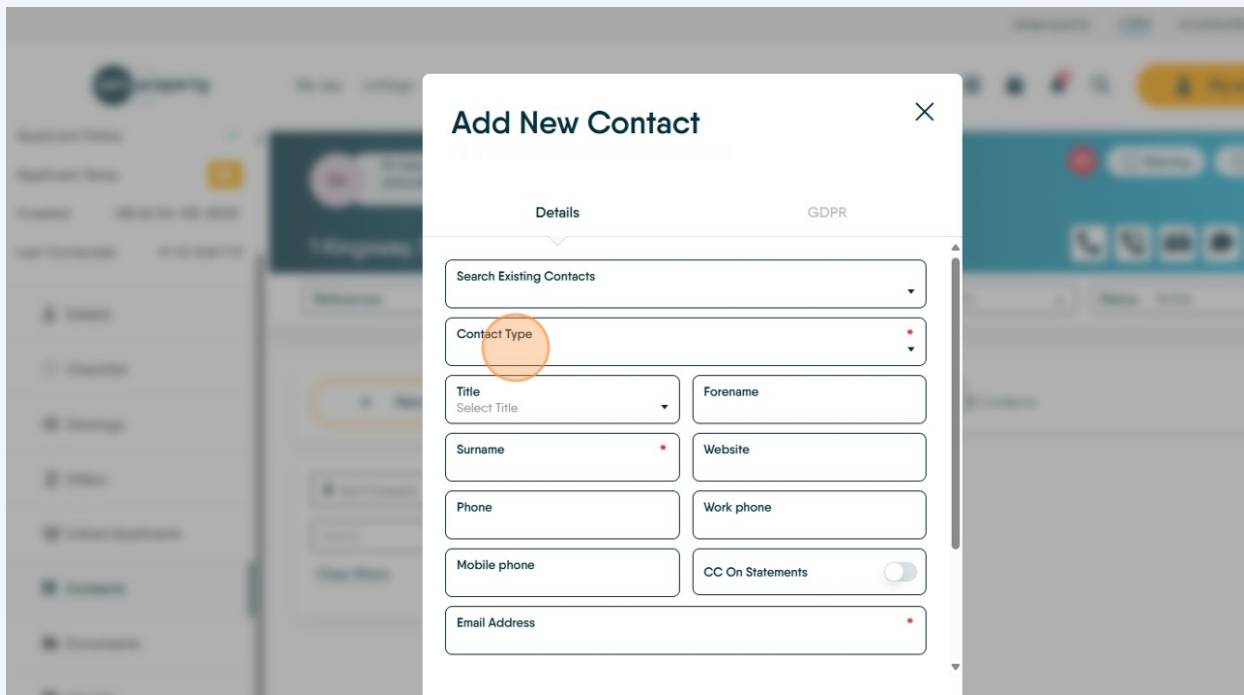
- 5 Type the name of the Contact you are searching for and select from the drop down menu.



The screenshot shows the 'Add New Contact' modal window. The 'Search Existing Contacts' dropdown menu is open, displaying a list of contacts. The contact 'John Edgar' is highlighted with an orange circle. The list includes names, email addresses, and phone numbers. Below the list, the 'Mobile phone' and 'CC On Statements' fields are visible. At the bottom, there are 'Cancel' and 'Save Contact' buttons.

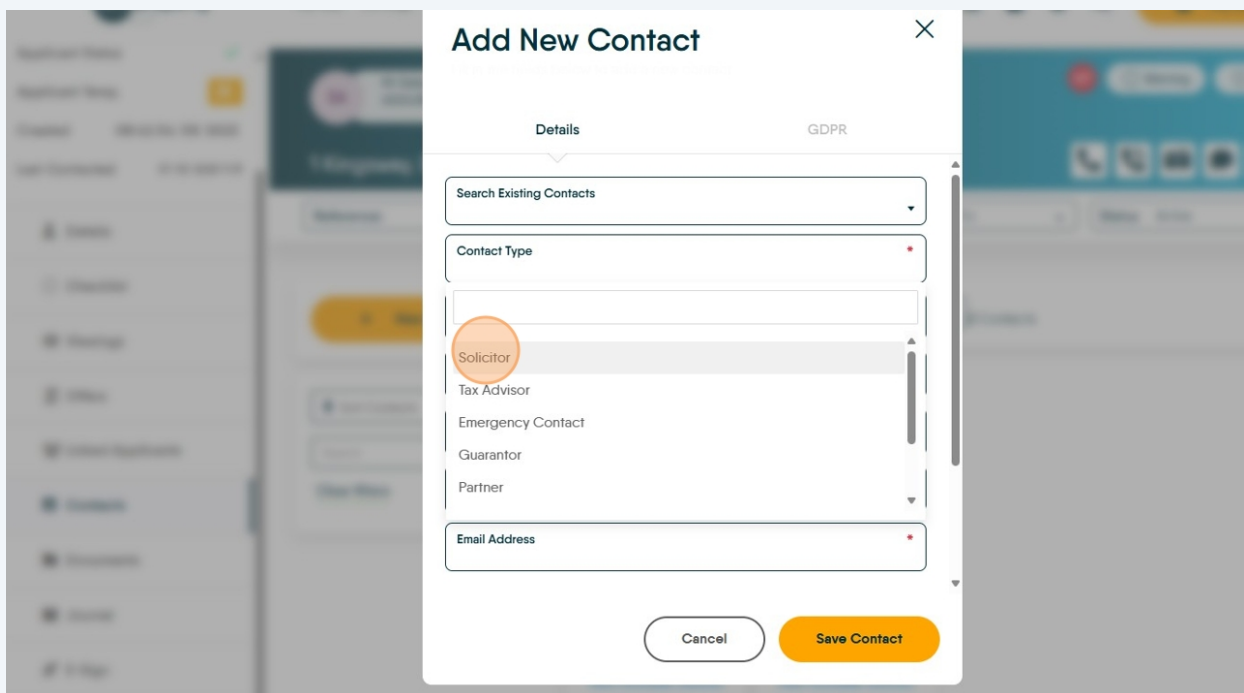
Name	Email	Phone
John Steed	John.steed@avenger.com	1474963
Johnny Cash	ian.henry+27@iamproperty.com	1541415
John Edgar	zagg.dave@gmail.com	1422808
John Barnes	john@barnes.com	1508500
John Brown	jbtest@vtuk.com	1426955
John Doodle	david.morgan@iamproperty.com	1541173

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



The screenshot shows a modal window titled "Add New Contact" with a close button (X) in the top right corner. Below the title are two tabs: "Details" (selected) and "GDPR". The form contains several input fields: "Search Existing Contacts" (a dropdown), "Contact Type" (a dropdown menu, highlighted with an orange circle), "Title" (a dropdown with "Select Title" as the placeholder), "Forename", "Surname" (marked with a red asterisk), "Website", "Phone", "Work phone", "Mobile phone", "CC On Statements" (a toggle switch), and "Email Address" (marked with a red asterisk).

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



This screenshot shows the same "Add New Contact" modal window, but the "Contact Type" dropdown menu is open, displaying a list of options: "Solicitor" (highlighted with an orange circle), "Tax Advisor", "Emergency Contact", "Guarantor", and "Partner". The "Email Address" field is visible below the dropdown. At the bottom of the modal, there are two buttons: "Cancel" and "Save Contact".

8 Complete all the fields

The screenshot shows a 'Details' form for a contact named John Edgar. The form is titled 'Details' and 'GDPR'. It contains the following fields:

- Search Existing Contacts:** John Edgar, zaggy.dave@gmail.com, 1422808
- Contact Type:** Solicitor
- Title:** Mr
- Forename:** John
- Surname:** Edgar
- Website:**
- Phone:** 01325464645
- Work phone:**
- Mobile phone:**
- CC On Statements:** (toggle switch)
- Email Address:** zaggy.dave@gmail.com

At the bottom of the form are two buttons: 'Cancel' and 'Save Contact'. An orange circle highlights the 'Save Contact' button.

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

The screenshot shows the same 'Details' form, but with an additional section at the bottom titled 'Address Details'. The 'Postcode' field is highlighted with an orange circle. The form contains the following fields:

- Title:** Mr
- Forename:** John
- Surname:** Edgar
- Website:**
- Phone:** 01325464645
- Work phone:**
- Mobile phone:**
- CC On Statements:** (toggle switch)
- Email Address:** zaggy.dave@gmail.com
- Postcode:** DL3 0ZS
- Address:**

At the bottom of the form are two buttons: 'Cancel' and 'Save Contact'.

10 Click here to search.

The screenshot shows a contact form titled "Details" and "GDPR". The form contains several input fields: "Mr" (dropdown), "John" (text), "Surname" (Edgar), "Website" (empty), "Phone" (01325464645), "Work phone" (empty), "Mobile phone" (empty), "CC On Statements" (toggle), "Email Address" (zaggdave@gmail.com), "Postcode" (DL3 0ZS), and "Address" (empty). A magnifying glass icon is highlighted in the "Postcode" field. At the bottom, there are "Cancel" and "Save Contact" buttons.

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

The screenshot shows the same contact form as above, but with the "Address" field highlighted. The "Address" field now displays "-- Select Address --" and a magnifying glass icon. The "Postcode" field remains "DL3 0ZS". At the bottom, there are "Cancel" and "Save Contact" buttons.

12 Click "Save Contact"

The screenshot shows a contact form with two tabs: 'Details' and 'GDPR'. The 'Details' tab is active, displaying the following fields:

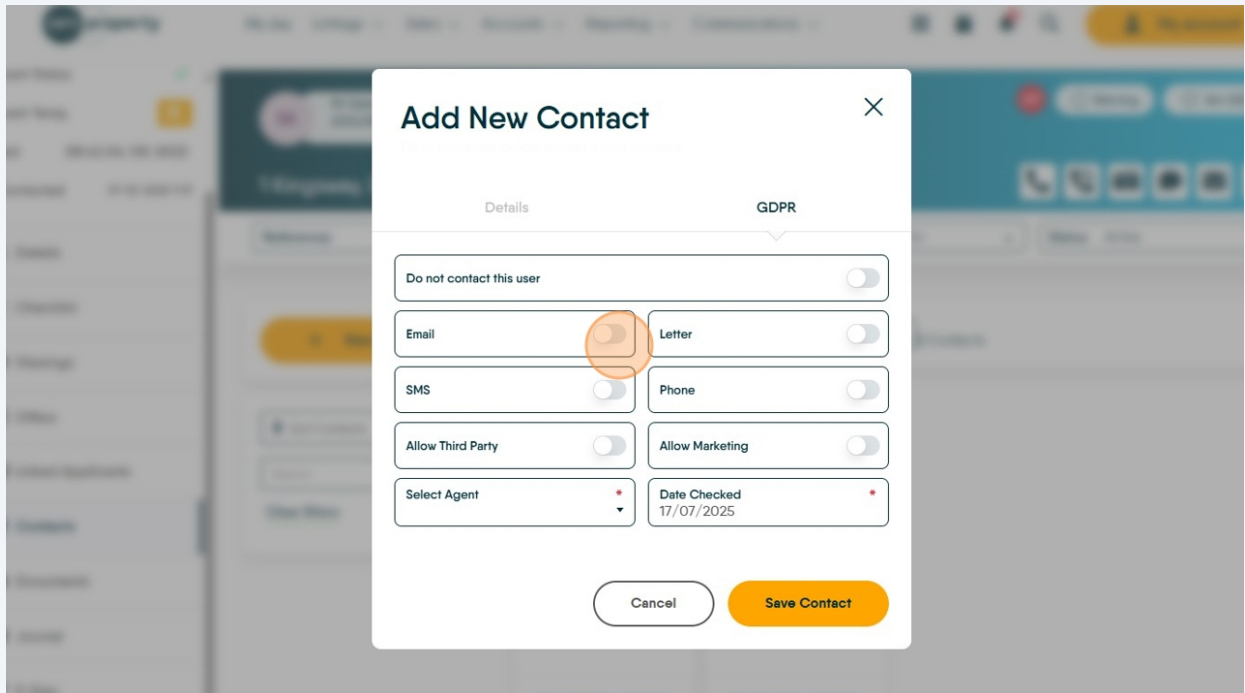
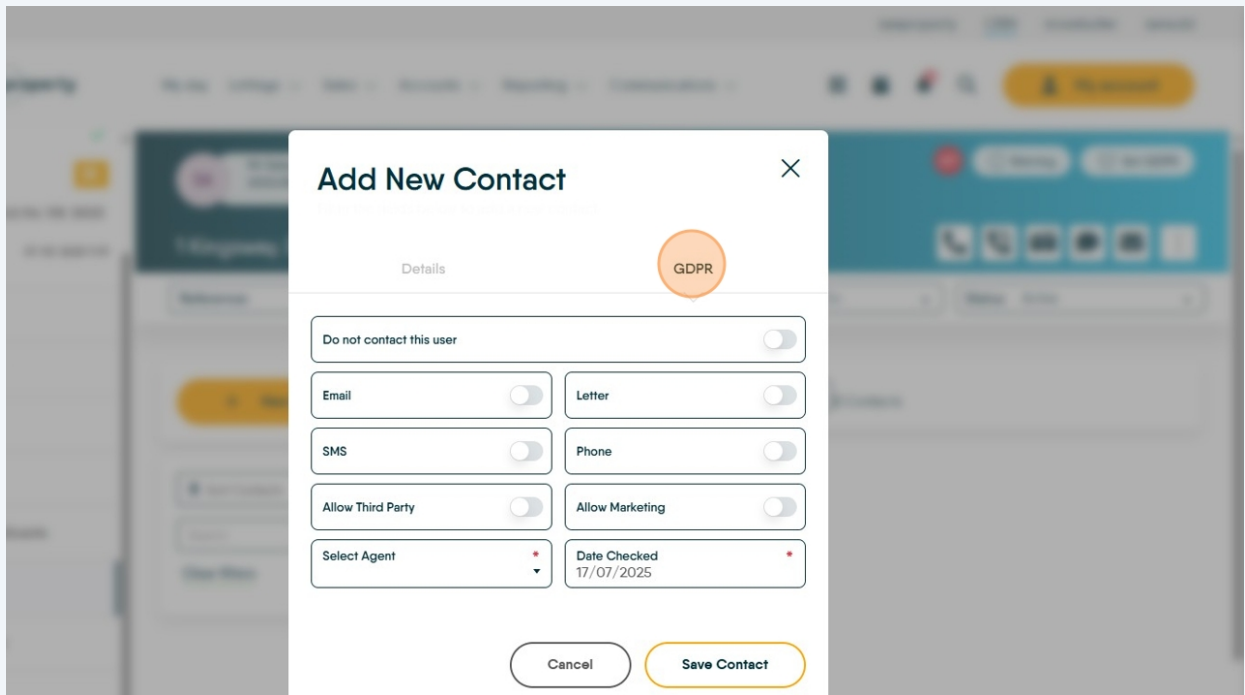
- Name:** Mr (dropdown), John
- Surname:** Edgar
- Phone:** 01725 611111
- Website:** (empty)
- Work phone:** (empty)
- Address:** A dropdown menu is open, showing the following options:
 - Select Address --
 - 1 Falmouth Drive, Darlington, County Durham, DL30ZS, UK
 - Parry's Mini Market Ltd 19 Falmouth Drive, Darlington, County Durham, DL30ZS, UK
 - 2 Falmouth Drive, Darlington, County Durham, DL30ZS, UK
 - 3 Falmouth Drive, Darlington, County Durham, DL30ZS, UK

At the bottom of the form, there are two buttons: 'Cancel' and 'Save Contact'. The 'Save Contact' button is highlighted with an orange circle.



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.



The screenshot shows a web application interface with a modal dialog titled "Add New Contact". The dialog has two tabs: "Details" and "GDPR". The "GDPR" tab is active. It contains several toggle switches and a date field. An orange circle highlights the "Email" toggle switch, which is currently turned off. Other toggles include "Do not contact this user", "Letter", "SMS", "Phone", "Allow Third Party", and "Allow Marketing". A "Select Agent" dropdown menu is also present, along with a "Date Checked" field showing "17/07/2025". At the bottom are "Cancel" and "Save Contact" buttons.

Add New Contact

Details GDPR

Do not contact this user ☐

Email ☐ Letter ☐

SMS ☐ Phone ☐

Allow Third Party ☐ Allow Marketing ☐

Select Agent Date Checked 17/07/2025

Cancel Save Contact

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

This screenshot is similar to the one above, showing the "Add New Contact" dialog box with the "GDPR" tab active. In this instance, an orange circle highlights the "Select Agent" dropdown menu, indicating where the user should click to select the "Negotiator". The other elements, including the toggle switches and the "Date Checked" field, remain the same as in the previous image.

Add New Contact

Details GDPR

Do not contact this user ☐

Email ☐ Letter ☐

SMS ☐ Phone ☐

Allow Third Party ☐ Allow Marketing ☐

Select Agent Date Checked 17/07/2025

Cancel Save Contact

15 Click "Save Contact"

The image shows a mobile application interface with a modal dialog titled "Add New Contact". The dialog has a close button (X) in the top right corner. Below the title, there are two tabs: "Details" and "GDPR", with "GDPR" being the active tab. The "GDPR" tab contains several toggle switches and dropdown menus. The "Do not contact this user" toggle is turned off. The "Email", "Letter", "SMS", and "Phone" toggles are all turned on. The "Allow Third Party" and "Allow Marketing" toggles are turned off. The "Select Agent" dropdown menu is set to "Brooke Morgan". The "Date Checked" field shows "17/07/2025". At the bottom of the dialog, there are two buttons: "Cancel" and "Save Contact". The "Save Contact" button is highlighted with an orange circle.

Add New Contact ✕

Details GDPR

Do not contact this user ☐

Email ☒ Letter ☒

SMS ☒ Phone ☒

Allow Third Party ☐ Allow Marketing ☐

Select Agent * Date Checked *

Cancel Save Contact