

Updating Sales Applicant Status and Buyer Position CRM



This guide provides a straightforward process for updating sales applicant statuses and buyer positions in the CRM, ensuring accurate tracking and management of property sales. By following these steps, users can efficiently navigate the system to maintain up-to-date records, which is crucial for effective sales operations. Whether you're a new user or need a refresher, this guide simplifies the task, enhancing productivity and organisation in property sales management.

1 Navigate to the Sales Record you want to update.

The screenshot displays the CRM interface for a sales applicant record. The top navigation bar includes 'iam property' and menu items: 'My day', 'Lettings', 'Sales', 'Accounts', 'Reporting', and 'Communications'. A user profile 'My account' is visible in the top right. The main header area shows the applicant's name 'Sales applicant97' with email 'zagg.dave@gmail.com', a warning icon, and a 'Set GDPR' button. Below this is the address '1755 Kingsway, Darlington, County Durham'. A form section contains fields for 'Reference', 'Negotiator' (Training Dave), 'Branch' (Morgan & Co), and 'Status' (Active). The 'Personal Information' section includes fields for Title, Forename (Sales), Surname (applicant97), Company Name, Website, Phone Number, Work phone, Mobile phone, Email Address (zagg.dave@gmail.com), Salutation (applicant97), Source, and Temperature. The 'Applicant Address' section shows Postcode (DL1 3EY) and Address (1755 Kingsway, Darlington, County Durham, DL1 3EY, UK) with an 'Edit Manually' button.



Tip! The 'Status' drop down menu can be edited in the 'Lookups' section of the 'Configuration' menu. There is a guide on this in the CRM Help Center

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In the Status field at the top of the screen, select the option you want from the drop down list.

The screenshot shows the CRM interface for a sales applicant. At the top, there is a navigation bar with 'My account' and a 'Status' dropdown menu set to 'Active', which is highlighted with an orange circle. Below the navigation bar, the applicant's name 'Sales applicant97' and email 'zagg.dave@gmail.com' are displayed. The address '1765 Kingsway, Darlington, County Durham' is shown. Below the address, there are fields for 'Reference:', 'Negotiator: Training Dave', 'Branch: Morgan & Co', and 'Status: Active'. The 'Status' dropdown is highlighted with an orange circle. Below this, there is a 'Personal Information' section with fields for Title, Forename (Sales), Surname (applicant97), Company Name, Website, Phone Number, Work phone, Mobile phone, Email Address (zagg.dave@gmail.com), Salutation (applicant97), Source, and Temperature. At the bottom, there is an 'Applicant Address' section with an 'Edit Manually' button.

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To update the 'Buyer Position' scroll down the screen to Applicant Criteria. Click into the 'Buyer Position' and select from the drop down menu. In this case we selected Property to Sell - Not on Market Yet.

The screenshot shows the CRM interface for 'Applicant Criteria'. The 'Buyer Position' dropdown menu is highlighted with an orange circle and set to 'Property to Sell - Not on Market Yet'. Below the navigation bar, there is a search bar for 'Search for Area...' and a 'Miles' dropdown set to '1/4 Mile'. There are also 'Min Price' and 'Max Price' fields set to '£ 0.00'. Below these, there are 'Minimum Bedrooms' and 'Minimum Bathrooms' fields. The 'Move In Date' is set to '01/07/2025'. The 'Property Attributes' section is empty. The 'Property Type' section has a search bar and several toggle switches for 'Apartment', 'Bar/Nightclub', 'Barn', and 'Barn Conversion'. The 'Property Age' and 'Property Style' fields are also visible.

4 Click here to Save the settings.

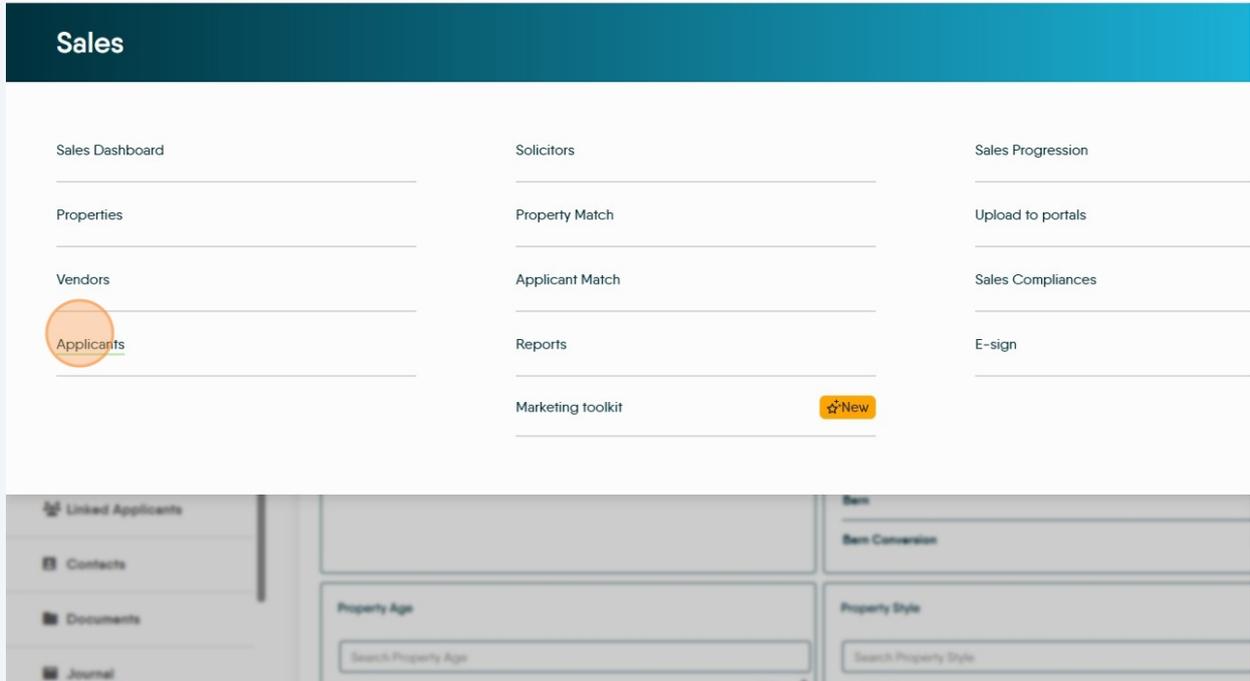
The screenshot shows the 'Applicant Criteria' form. On the left, there is a sidebar with a 'Latest Offer' of £0.00 and a date of 52 01/07/2025. The main form contains several sections: 'Search for Area...' with a 'Miles' dropdown set to '1/4 Mile' and an 'Add Area' button; 'Min Price' and 'Max Price' both set to '£ 0.00'; 'Minimum Bedrooms' and 'Minimum Bathrooms' each with a range of 0; 'Move In Date' set to '01/07/2025'; 'Buyer Position' set to 'Property to Sell - Not on Market Yet'; 'Property Attributes' (empty); 'Property Type' with a search bar and toggle switches for 'Apartment', 'Bar/Nightclub', 'Barn', and 'Barn Conversion'; 'Property Age' with a search bar and a 'Period' toggle; and 'Property Style' with a search bar and a '30's Semi' toggle. A 'Save Changes' button with a lock icon is highlighted with an orange circle in the bottom right corner.

Viewing Sales Applicant Status

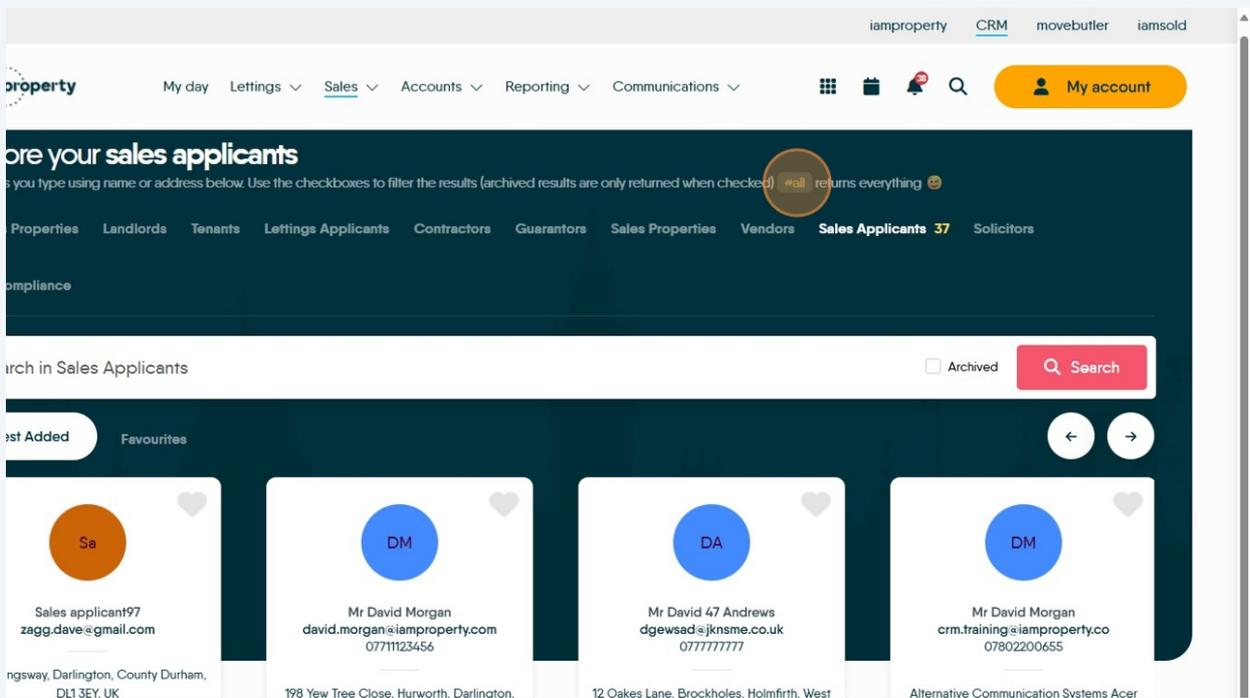
5 Click "Sales"

The screenshot shows the 'iam property' dashboard. The top navigation bar includes 'My day', 'Lettings', 'Sales' (highlighted with an orange circle), 'Accounts', 'Reporting', and 'Communications'. The left sidebar contains a 'Details' section with options: 'Checklist', 'Viewings', 'Offers', 'Linked Applicants', and 'Contacts'. The main content area displays the 'Applicant Criteria' form, which is identical to the one in the previous screenshot. The 'Sales' menu item is highlighted with an orange circle.

6 Click "Applicants"



7 Click "#all"



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You will then see a list of all the Sales Applicants you have in CRM. If you see this screen as tiles (as in the previous screen) click here.

The screenshot shows a CRM interface with a dark blue header. The main heading is "Manage your sales applicants". Below it, there is a search bar and a filter for "Archived". A navigation menu includes "Properties", "Landlords", "Tenants", "Lettings Applicants", "Contractors", "Guarantors", "Sales Properties", "Vendors", "Sales Applicants 37", and "Solicitors". A table lists sales applicants with columns for "Applicant Name" and "Address".

Applicant Name	Address
Sales applicant97	1765 Kingsway, Darlington, County Durham, DL1 3EY, UK
Mr David Morgan	198 Yew Tree Close, Hurworth, Darlington, Durham, DL2 2HX, UK
Mr David 47 Andrews	12 Oakes Lane, Brockholes, Holmfirth, West Yorkshire, HD9 7AR, UK
Mr David Morgan	Alternative Communication Systems Acer Court, North Leigh Business Park, North Leigh, Witney, Oxfordshire, OX
Mr sales applicant65	831 Pelaw Crescent, Chester le Street, County Durham, DH2 2HX, UK
Ms Sales applicant65	831 Pelaw Crescent, Chester le Street, County Durham, DH2 2HX, UK

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Scroll across the screen and you will see the Buyer Position and Applicant Status columns.

As with other areas of CRM you can click the header line and sort the column by ascending or descending order.

Email	Buyer Position	Branch	Date ...	Applicant Status	Last Contacted ...
zagg.dave@gmail.com	Property to Sell - Not on Market Yet	Morgan & Co	01/07/2...	Active	
david.morgan@iamproperty.com	Not Specified	Morgan & Co	27/05/2...		19/06/2025
dgevsad@jksme.co.uk	Not Specified	Morgan & Co	25/04/...		
55 crm.training@iamproperty.co	Cash Buyer	Morgan & Co	21/04/2...	Active	
zagg.dave@gmail.com	Not Specified	Morgan & Co	07/03/...	Active	
2 zagg.dave22@gmail.com	Property to Sell - Not on Market Yet	Morgan & Co	07/03/...		
zagg.dave@gmail.com	Not Specified	Morgan & Co	28/01/2...	Active	
zagg.dave@gmail.com	Property to Sell - Not on Market Yet	Morgan & Co	28/01/2...	Active	28/01/2025
zagg.dave@gmail.com	Property to Sell - Not on Market Yet	Morgan & Co	03/01/2...	Active	
d@d.com	Not Specified	Morgan & Co	21/11/2...	Active	
2 zagg.dave98@gmail.com	Not Specified	Morgan & Co	23/10/2...		27/03/2025
4 david.johnson@iamproperty.com	Cash Buyer	Morgan & Co	18/10/2...	Active	16/01/2025
zagg.dave@gmail.com	Not Specified	Morgan & Co	18/10/2...	Active	