

Archiving a Property Record in CRM



This guide provides essential, step-by-step instructions for archiving property records in a CRM, ensuring you streamline your property management processes.

Archiving a Record in CRM does not remove it from the CRM, the record stays in the CRM and can be searched for using the 'Show Archived in Results' option in the Global Search function. Archived records can also be restored to active status.

1 Navigate to the Property to be archived

The screenshot displays the 'iam property' CRM interface. The top navigation bar includes 'My day', 'Lettings', 'Sales', 'Accounts', 'Reporting', 'Communications', and 'My account'. A sidebar on the left lists various modules: Details, Checklist, Appraisals, Compliance, Information, Stats, Marketing, Media, Rooms, and Portals. The main content area shows a property record for '8899 Pelaw Crescent, Chester le Street, DH22HX'. It includes a 'Lead vendor' section with 'lettings.applicant102' and a 'View Vendors' button. Below this are fields for 'Reference', 'Negotiator' (Training Dave), 'Branch' (Morgan & Co), and 'Status'. The 'PROPERTY PICTURES' section shows 'No pictures available' with an 'Upload' button. The 'Property Address' section includes a 'Postcode' field (DH22HX) and an 'Address' field (8899 Pelaw Crescent, Chester le Street, County Durham, DH22HX, UK). The 'Price/Instructed Date' section shows a 'Currency' dropdown set to 'GBP'.

2 Click here.

iamproperty CRM movebutler iamsold

property My day Lettings Sales Accounts Reporting Communications

8899 Pelaw Crescent, Chester le Street, DH22HX | £ 0 | 3 | 1

Lead vendor: [lettings.applicant102](#) View Vendors

Reference Negotiator Training Dave Branch Morgan & Co Status

PROPERTY PICTURES Upload

Property Address Edit Address

Postcode DH22HX

Address 8899 Pelaw Crescent, Chester le Street, County Durham, DH22HX, UK

3 Click "Archive"

8899 Pelaw Crescent, Chester le Street, DH22HX | £ 0 | 3 | 1

Lead vendor: [lettings.applicant102](#) View Vendors

Reference Negotiator Training Dave Branch Morgan & Co Status

PROPERTY PICTURES Upload

No pictures available
Please click the button to add

Property Address Edit Address

Postcode DH22HX

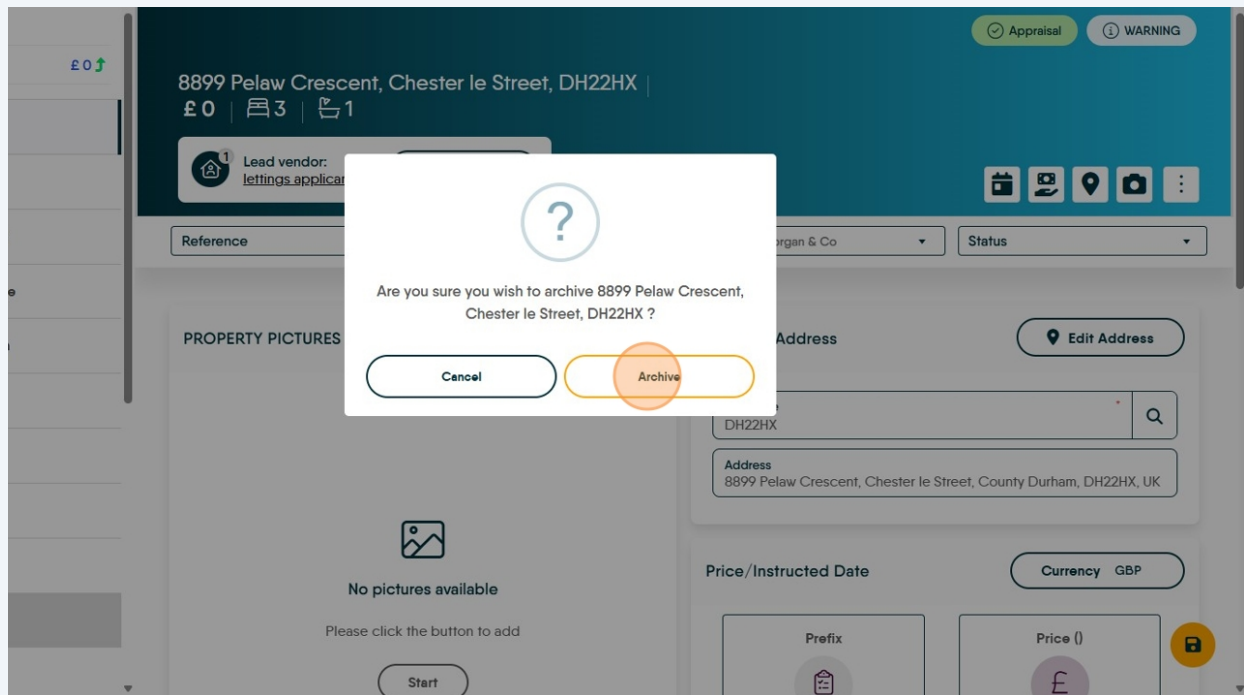
Address 8899 Pelaw Crescent, Chester le Street, County Durham, DH22HX, UK

Price/Instructed Date

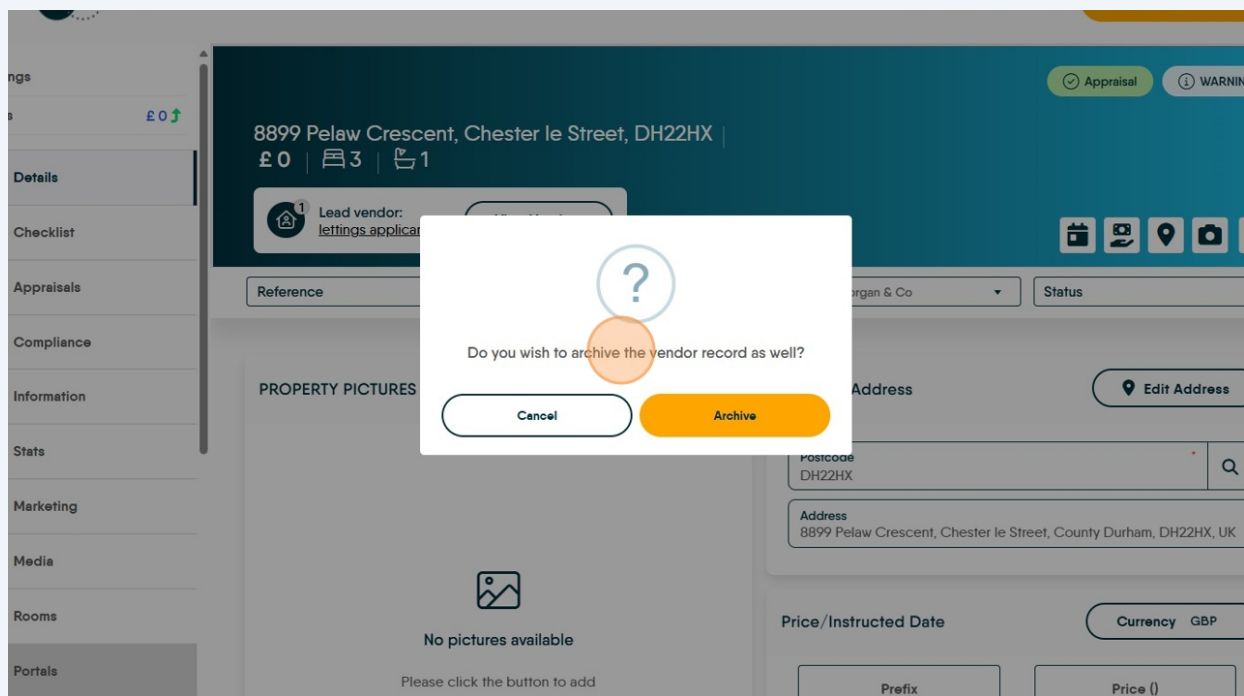
Prefix

Book viewing
Create offer
View on map
Property pictures
Create brochure, report
Archive
Match applicant
Letters
E-sign
Create lettings version
Duplicate this property

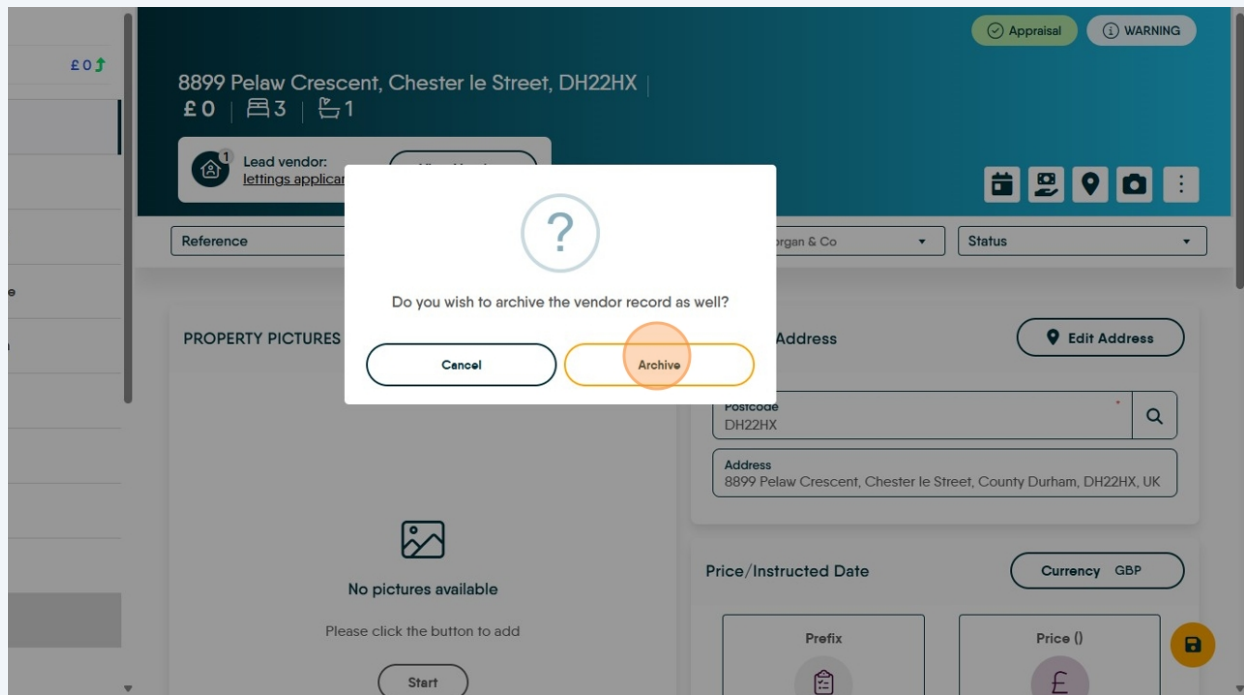
4 Click "Archive"



5 Click "Do you wish to archive the vendor record as well?"



6 Click "Archive" or "Cancel" as required



7 You will see "Archived" at the top of the record.

