

Archiving a Property Record in CRM



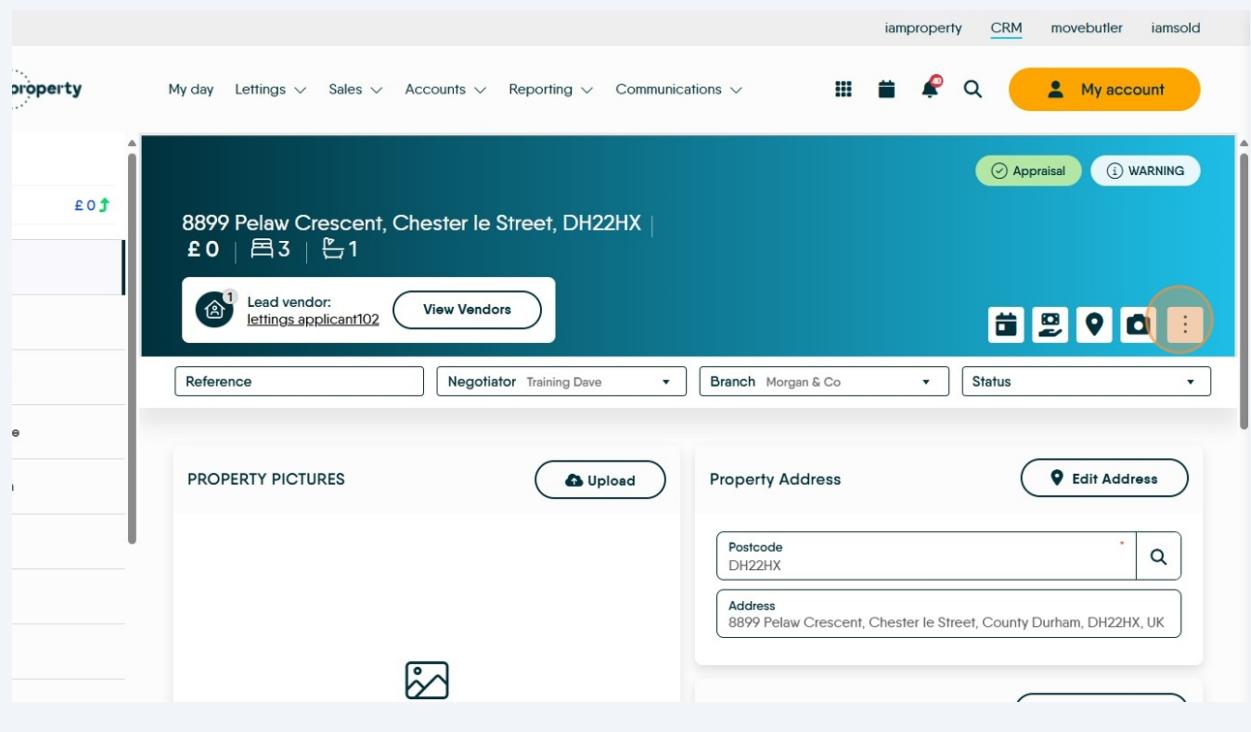
This guide provides essential, step-by-step instructions for archiving property records in a CRM, ensuring you streamline your property management processes.

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 shows the iam property CRM interface. The top navigation bar includes 'My day', 'Lettings', 'Sales', 'Accounts', 'Reporting', 'Communications', a user icon, and 'My account'. The main content area displays a property record for '8899 Pelaw Crescent, Chester le Street, DH22HX'. The record shows a price of £0, 3 bedrooms, and 1 bathroom. It includes a 'Lead vendor' section with 'lettings.applicant102', a 'View Vendors' button, and a 'PROPERTY PICTURES' section with an 'Upload' button and a message 'No pictures available'. The 'Property Address' section shows 'Postcode: DH22HX' and 'Address: 8899 Pelaw Crescent, Chester le Street, County Durham, DH22HX, UK'. The 'Price/Instructed Date' section shows 'Currency: GBP'. On the left, a sidebar lists 'Details', 'Checklist', 'Appraisals', 'Compliance', 'Information', 'Stats', 'Marketing', 'Media', 'Rooms', and 'Portals'.

2 Click here.



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

Lead vendor: lettings.applicant102

PROPERTY PICTURES

Upload

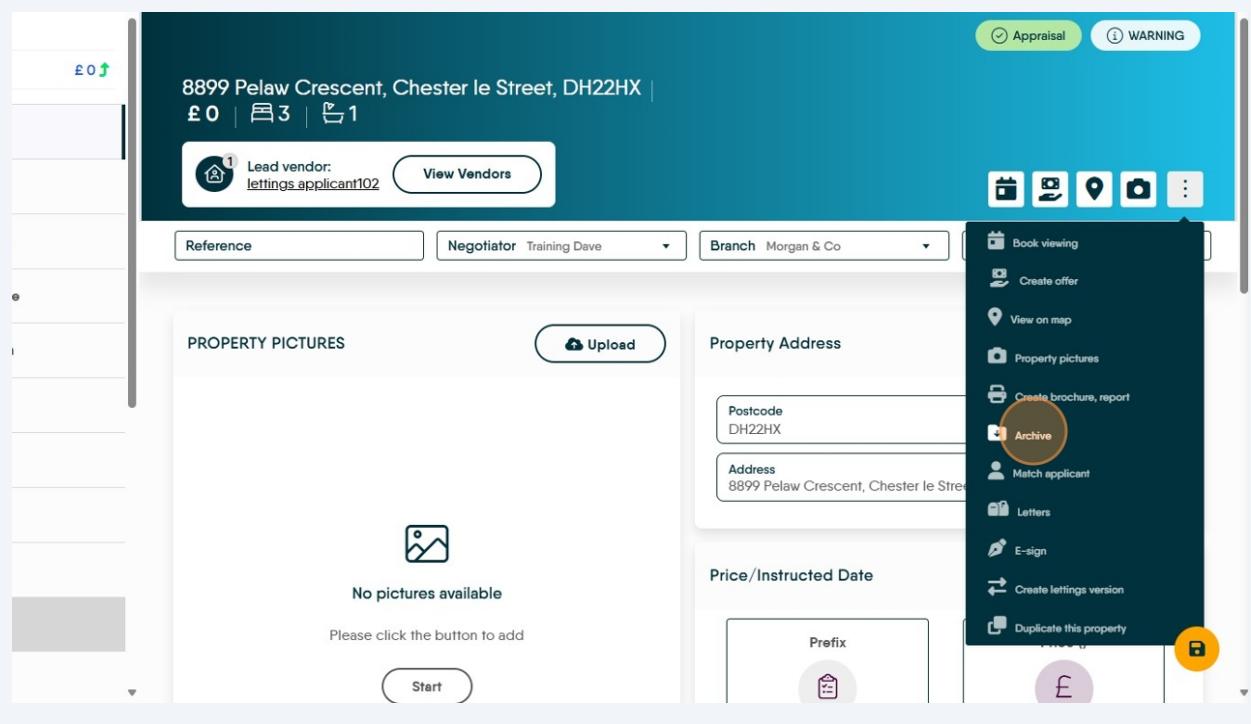
Property Address

Postcode: DH22HX

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

More

3 Click "Archive"



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

Lead vendor: lettings.applicant102

PROPERTY PICTURES

Upload

No pictures available

Please click the button to add

Start

Property Address

Postcode: DH22HX

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

Price/Instructed Date

Prefix

More

Archive

Book viewing

Create offer

View on map

Property pictures

Create brochure, report

Match applicant

Letters

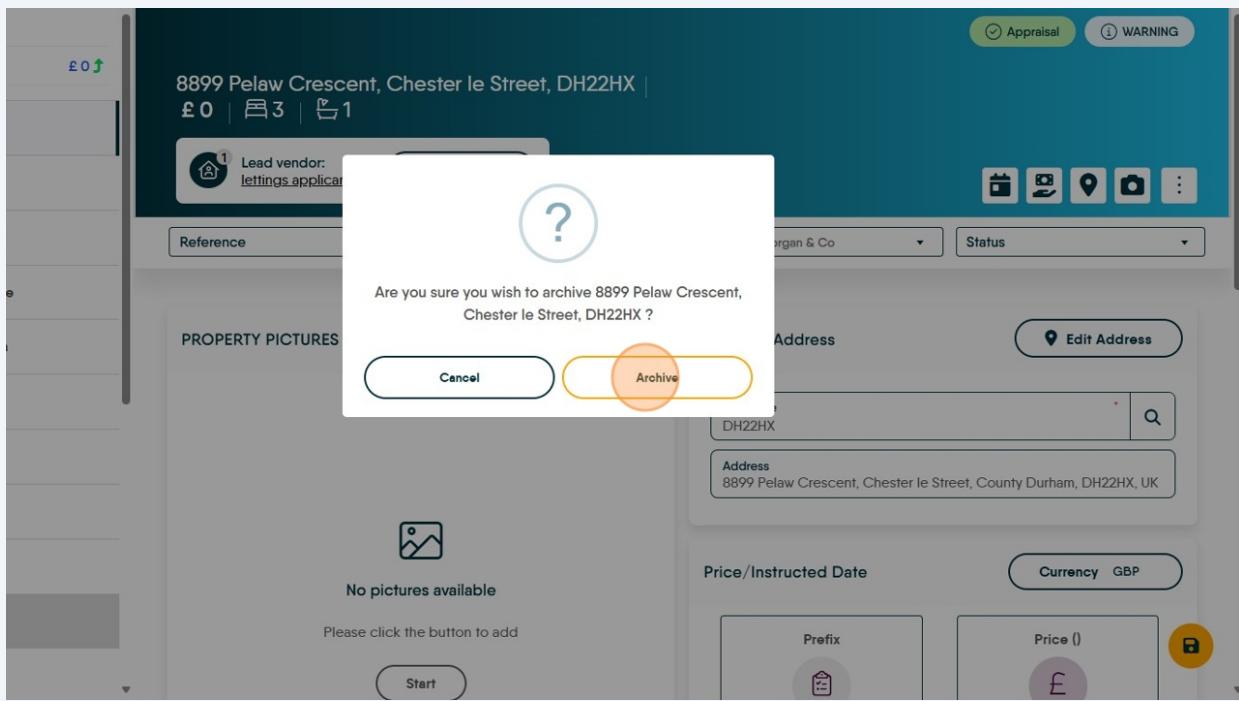
E-sign

Create lettings version

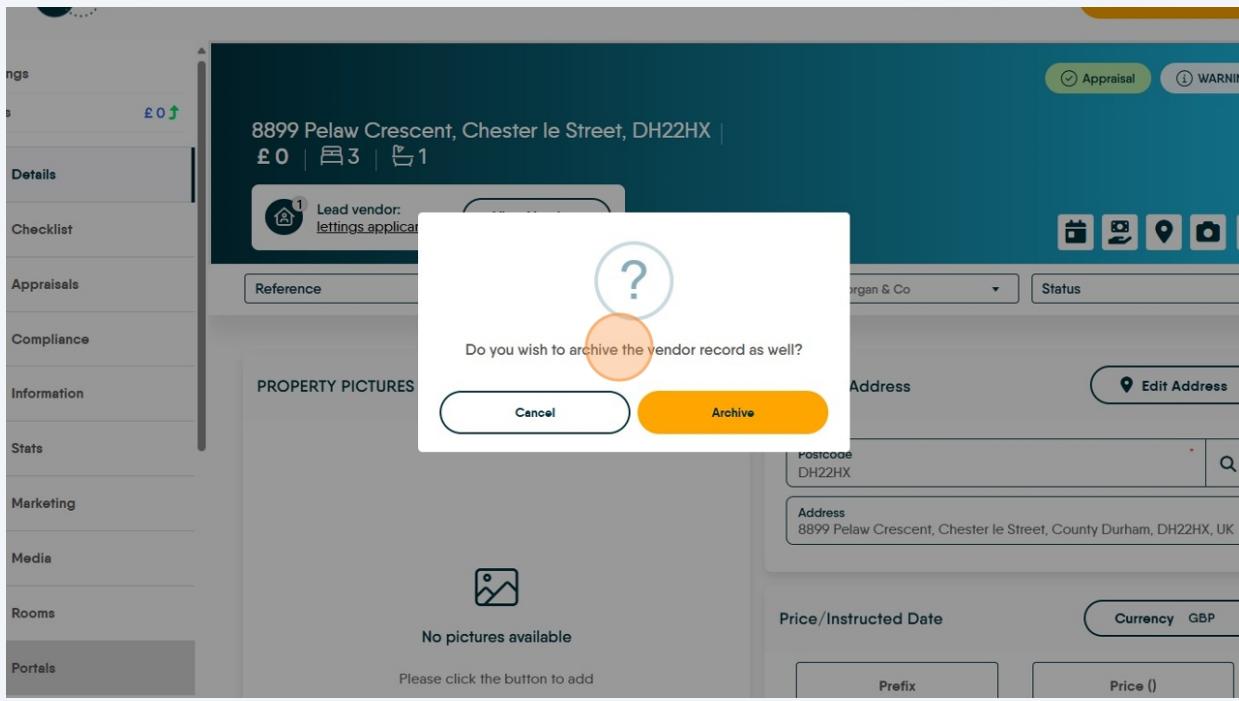
Duplicate this property

£

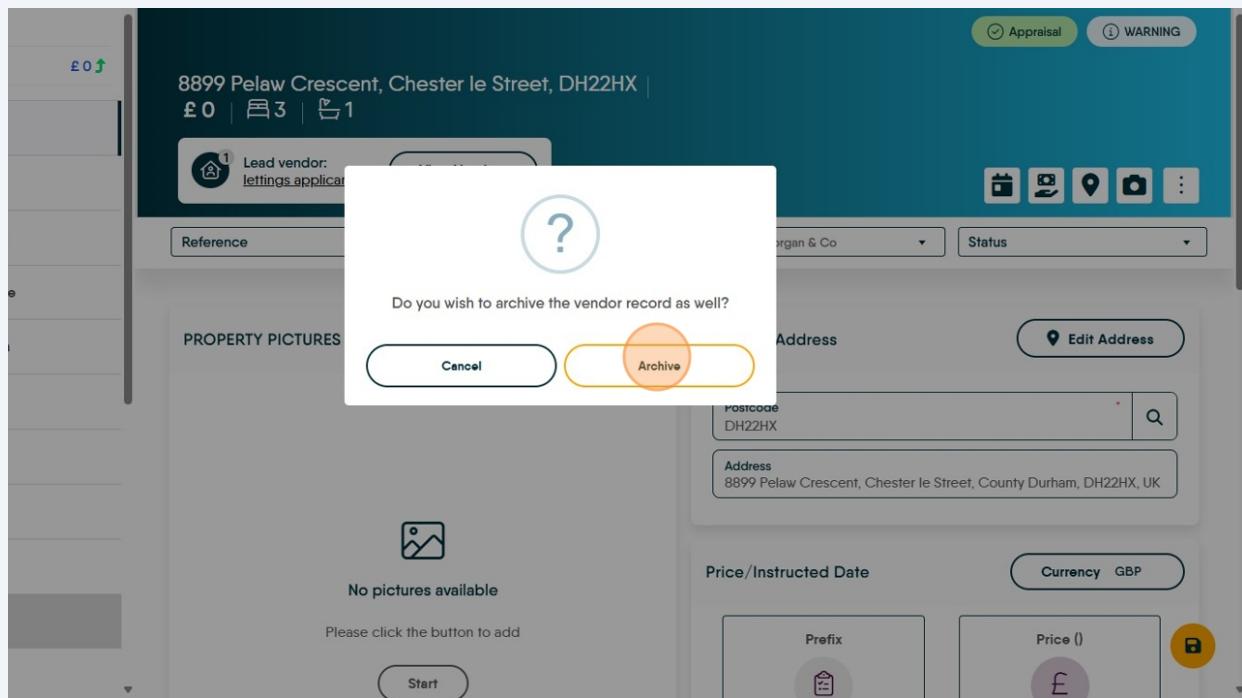
4 Click "Archive"



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.

