

Archiving an Applicant Record in CRM



This guide provides a straightforward process for archiving applicant records in the CRM system, ensuring that users can efficiently manage their data.

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 record to be archived.

iam property

My day Lettings Sales Accounts Reporting Communications

My account

fer £0.00

tus

if Status ✓

if Temp. 14:52 01/07/2025

tacted

Details

Checklist

Viewings

Offers

Linked Applicants

Contacts

Documents

Sales applicant97
zagg.dave@gmail.com

AP Warning Set GDPR

1765 Kingsway, Darlington, County Durham

Reference: Negotiator: Training Dave Branch: Morgan & Co Status: Active

Personal Information

Title Forename Sales Surname applicant97 Company Name

Website Phone Number Work phone Mobile phone

Email Address zagg.dave@gmail.com Salutation applicant97 Source Temperature

Applicant Address

Postcode DL1 3EY Address 1765 Kingsway, Darlington, County Durham, DL1 3EY, UK

Edit Manually

2 Click here.

iamproperty CRM movebutler iamsold

property My day Lettings Sales Accounts Reporting Communications

£0.00

52 01/07/2025

licants

Sa Sales applicant97 zagg.dave@gmail.com

AP Warning Set GDPR

1765 Kingsway, Darlington, County Durham

Reference: Negotiator: Training Dave Branch Morgan & Co Status Active

Personal Information

Title	Forename Sales	Surname applicant97	Company Name
Website	Phone Number	Work phone	Mobile phone
Email Address zagg.dave@gmail.com	Salutation applicant97	Source	Temperature

Applicant Address

Edit Manually

3 Click "Archive"

£0.00

52 01/07/2025

licants

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Personal Information

Title	Forename Sales	Surname applicant97	Company Name
Website	Phone Number	Work phone	Mobile phone
Email Address zagg.dave@gmail.com	Salutation applicant97	Source	Temperature

Applicant Address

Postcode DL1 3EY Address 1765 Kingsway, Darlington, County Durham, DL1 3EY, UK

Edit Manually

Add Call Log Call Create Letter Send SMS Send Email Match archive E-Sign

4

Click "Archive"

The screenshot displays a CRM interface for a sales applicant. At the top, the header shows the applicant's name "Sales applicant97" and email "zaggg.dave@gmail.com". Below this, the address "1765 Kingsway, Darlington, County Durham" is listed. A confirmation dialog box is centered on the screen, asking "Are you sure you wish to archive Sales applicant97?". The dialog has two buttons: "Cancel" and "Archive". The "Archive" button is highlighted with an orange circle. To the right of the dialog, a dark menu is open, listing various actions: "Add Call", "Log Call", "Create Letter", "Send SMS", "Send Email", "Match", "archive", and "E-Sign". The "archive" option in this menu is also highlighted with an orange circle. The background shows the "Personal Information" and "Applicant Address" sections of the CRM form.

£0.00

Sa Sales applicant97
zaggg.dave@gmail.com

AP Warning Set GDPR

1765 Kingsway, Darlington, County Durham

Reference: Negotiator: Training Dave Branch: Morgan & Co

52 01/07/2025

Personal Information

Title

Website

Email Address zaggg.dave@gmail.com

Salutation applicant97

Source

Applicant Address

Postcode DL1 3EY

Address 1765 Kingsway, Darlington, County Durham, DL1 3EY, UK

Edit Manually

Are you sure you wish to archive Sales applicant97?

Cancel Archive

Add Call

Log Call

Create Letter

Send SMS

Send Email

Match

archive

E-Sign

- 5 Archived will show in the top right of the screen.

