

# Archiving an Applicant Record in CRM

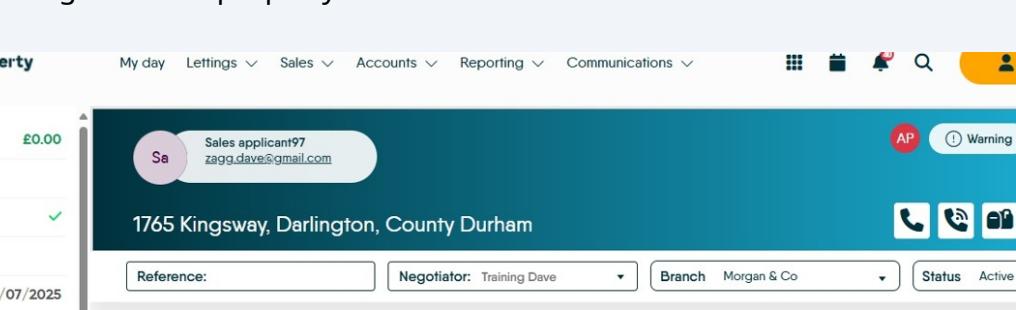


This guide provides a straightforward process for archiving applicant records in the CRM system, ensuring that users can efficiently manage their data.

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.

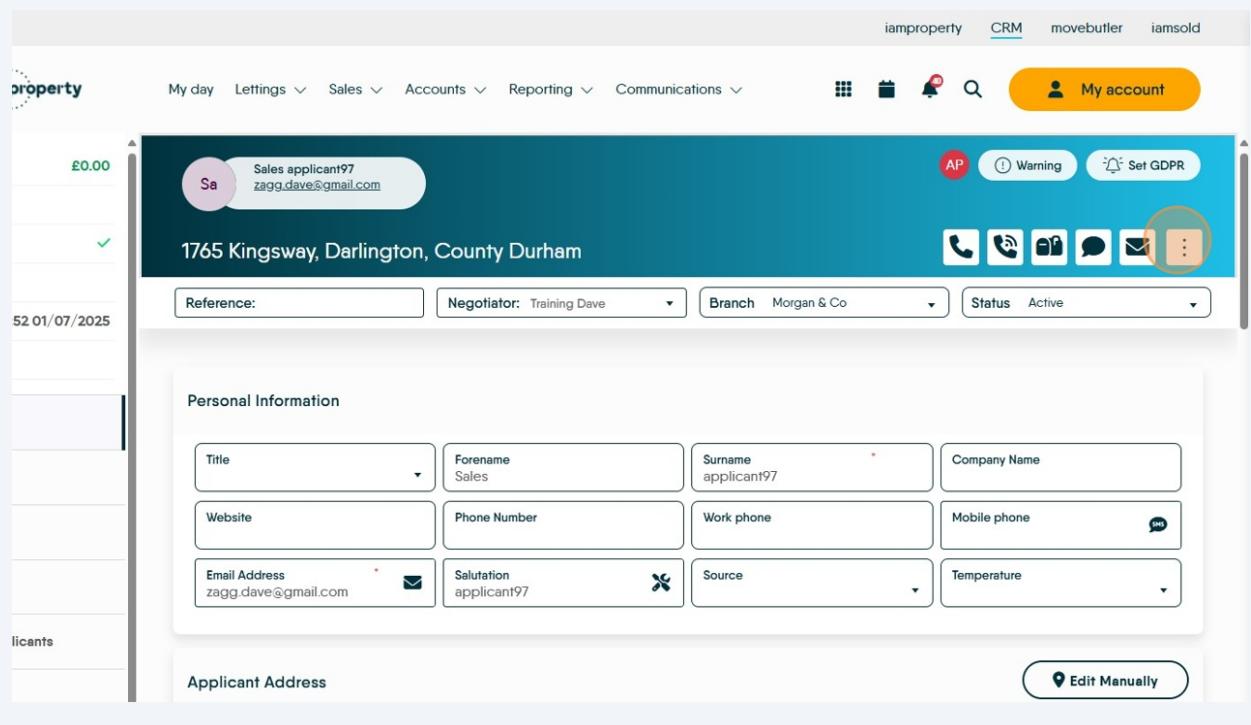
1 Navigate to the property record to be archived.

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The screenshot shows the 'iam property' software interface. On the left, a sidebar lists navigation options: Offers, Lettings, Sales, Accounts, Reporting, Communications, Checklist, Viewings, Offers, Booked Applicants, Contacts, and Documents. The main content area displays a property record for '1765 Kingsway, Darlington, County Durham'. The record includes a 'Personal Information' section with fields for Title (Sales), Forename (Sales), Surname (applicant97), Company Name, Website, Phone Number, Work phone, Mobile phone, Email Address (zagg.dave@gmail.com), Salutation (applicant97), Source, and Temperature. Below this is an 'Applicant Address' section with fields for Postcode (DL1 3EY) and Address (1765 Kingsway, Darlington, County Durham, DL1 3EY, UK). The status of the record is 'Active'. The top navigation bar includes links for 'My day', 'Lettings', 'Sales', 'Accounts', 'Reporting', 'Communications', and 'My account'. There are also icons for a grid, a calendar, a bell, a search bar, and a 'Set GDPR' button.

2 Click here.



My day Lettings Sales Accounts Reporting Communications

property

£0.00

Sa Sales applicant97 zagg.dave@gmail.com

1765 Kingsway, Darlington, County Durham

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

Personal Information

Title Forename Surname Company Name  
Website Phone Number Work phone Mobile phone  
Email Address Salutation Source Temperature

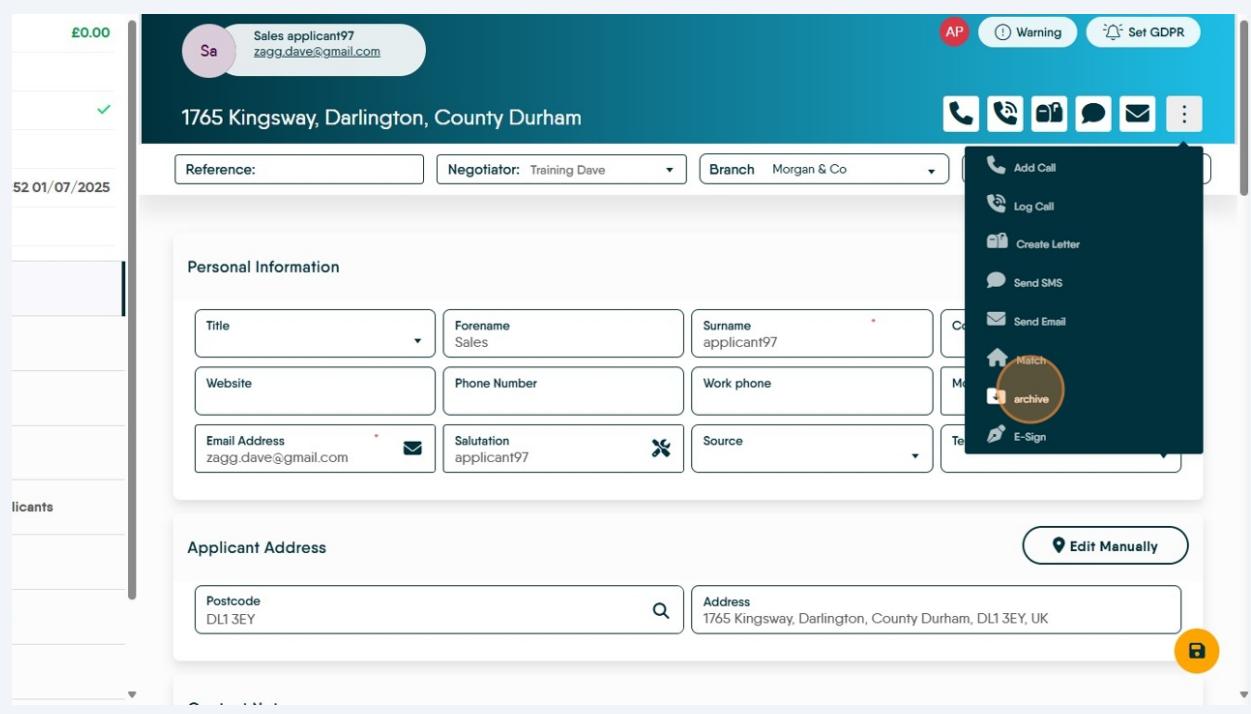
Applicant Address

Edit Manually

Actions

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

3 Click "Archive"



My day Lettings Sales Accounts Reporting Communications

property

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Sa Sales applicant97 zagg.dave@gmail.com

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Applicant Address

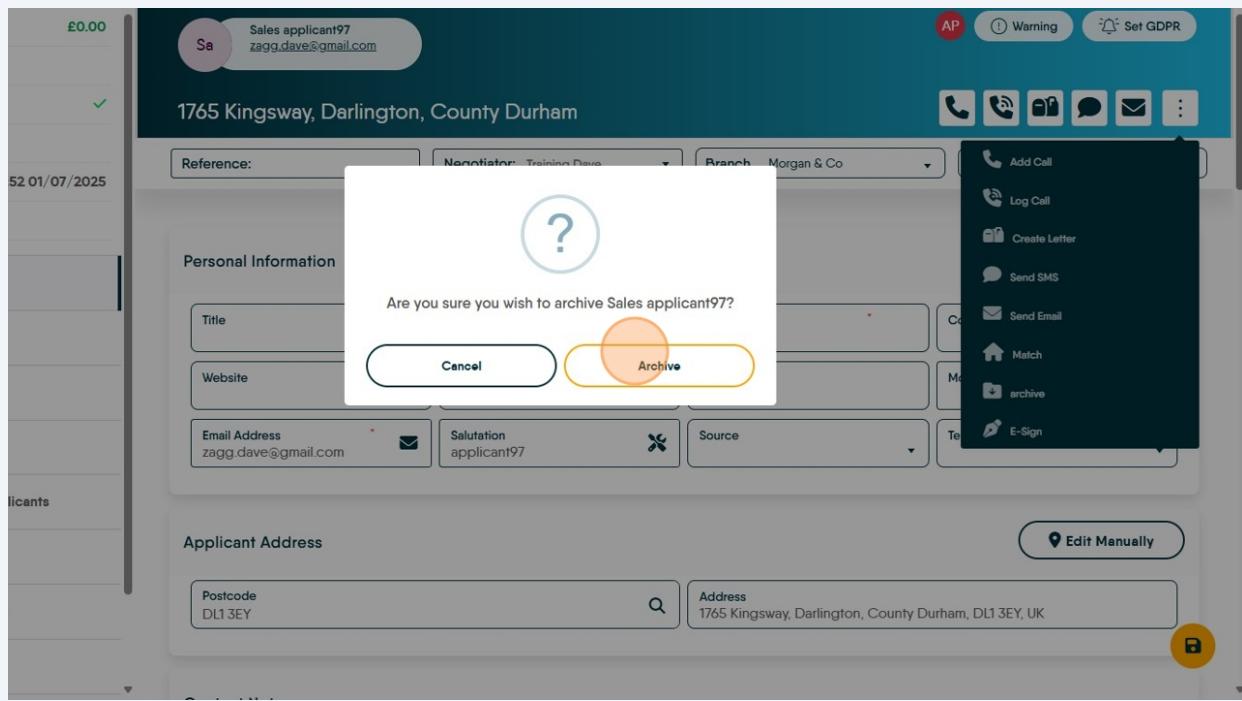
Edit Manually

Actions

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- Match
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- E-Sign

4

Click "Archive"



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

