

Archiving Sales Property and Vendor Records in CRM



This guide provides a straightforward process for archiving sales property and vendor records in your CRM, ensuring you can efficiently manage and organise your 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.

The screenshot shows the CRM interface for a property record. The top navigation bar includes 'iam property', 'My day', 'Lettings', 'Sales', 'Accounts', 'Reporting', 'Communications', and 'My account'. The main header displays the user 'lettings applicant102' with email 'zagg.dave@gmail.com' and a 'Warning' icon. The property address is '8899 Pelaw Crescent, Chester le Street'. Below the header, there are dropdown menus for 'Reference:', 'Negotiator: Training Dave', 'Branch: Morgan & Co', and 'Status: Active'. The main content area is divided into two sections: 'Personal Information' and 'Vendor Address'. The 'Personal Information' section includes fields for Title, Forename (lettings), Surname (applicant102), Company Name, Salutation, Website, Phone Number, Work phone, Mobile phone, Email Address (zacc.dave@gmail.com), and Source (Advert). The 'Vendor Address' section includes fields for Address type (Contact), Postcode (DH22HX), Address (8899 Pelaw Crescent, Chester le Street, County Durham, DH22HX, UK), House (8899), Line1 (Pelaw Crescent), Line2, Town (Chester le Street), County (County Durham), and Country (UK).

2 Click here.

iamproperty CRM movebutler iamsold

property My day Lettings Sales Accounts Reporting Communications My account

la lettings applicant102 zagg.dave@gmail.com

8899 Pelaw Crescent, Chester le Street

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

Personal Information

Title	Forename lettings
Surname applicant102	Company Name
Salutation	
Website	Phone Number
Work phone	Mobile phone

Vendor Address

Address type Contact	Postcode DH22HX
Address 8899 Pelaw Crescent, Chester le Street, County Durham, DH22HX, UK	
House 8899	Line1 Pelaw Crescent
Line2	Town Chester le Street

3 Click "Archive"

la lettings applicant102 zagg.dave@gmail.com

8899 Pelaw Crescent, Chester le Street

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

Personal Information

Title	Forename lettings
Surname applicant102	Company Name
Salutation	
Website	Phone Number
Work phone	Mobile phone
Email Address zagg.dave@gmail.com	Source Advert

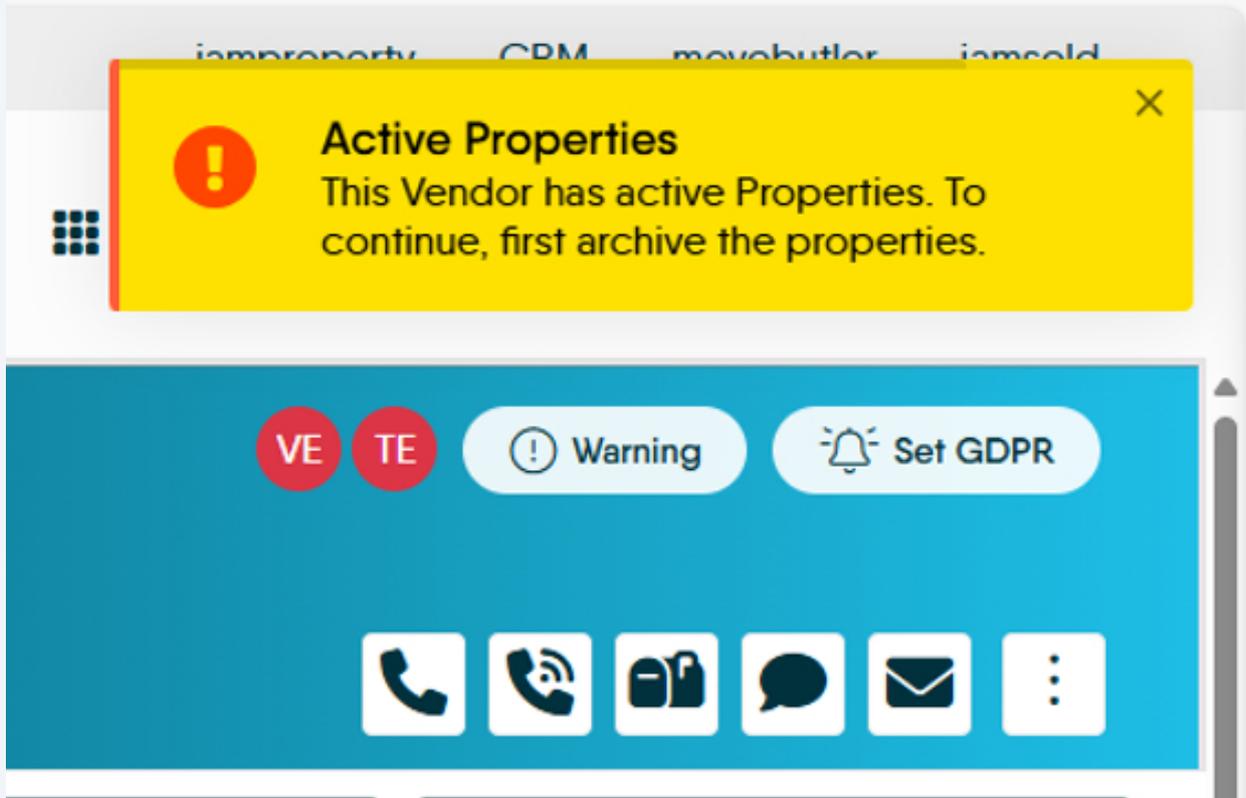
Vendor Address

Address type Contact	Postcode DH22HX
Address 8899 Pelaw Crescent, Chester le Street, County Durham, DH22HX, UK	
House 8899	Line1 Pelaw Crescent
Line2	Town Chester le Street
County Durham	Country UK

- Add Call
- Log Call
- Create Letter
- Send SMS
- Send Email
- Create Brochure, Report
- archive
- E-Sign

4

If the vendor has active properties you will see this warning message. Go to the property record where you can archive both the property and the Vendor

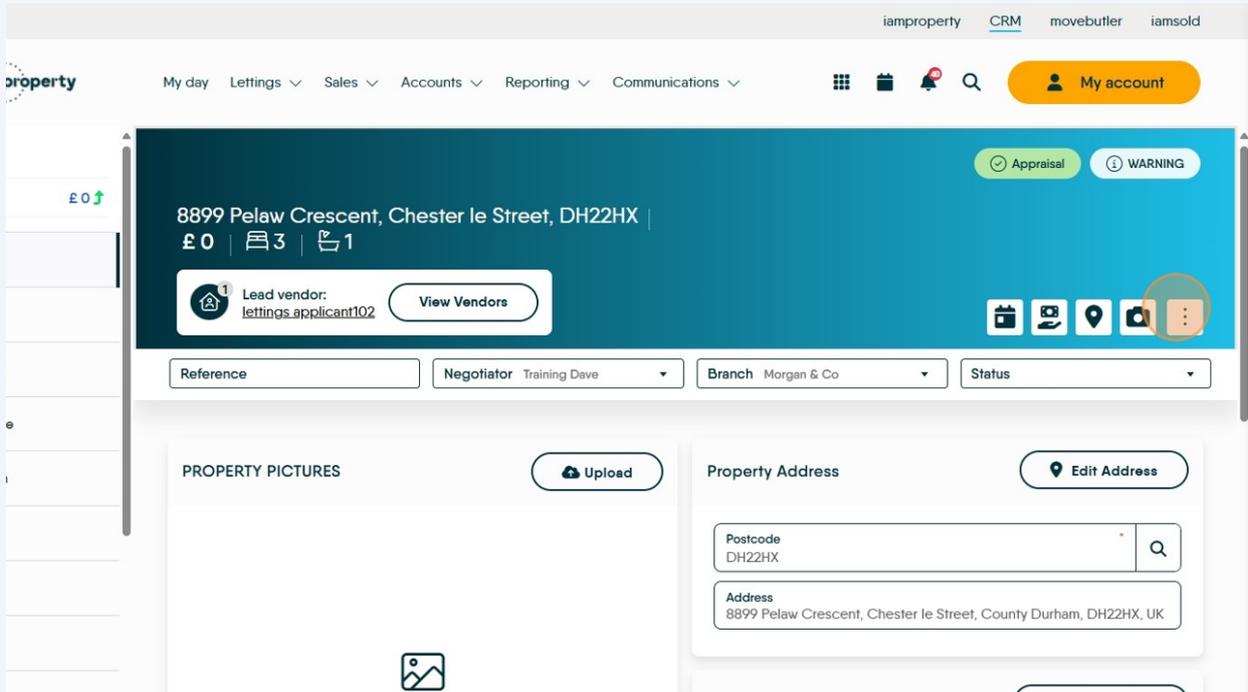


Tip! A Property can be archived without archiving the Vendor, however to archive a vendor the property must also be archived.

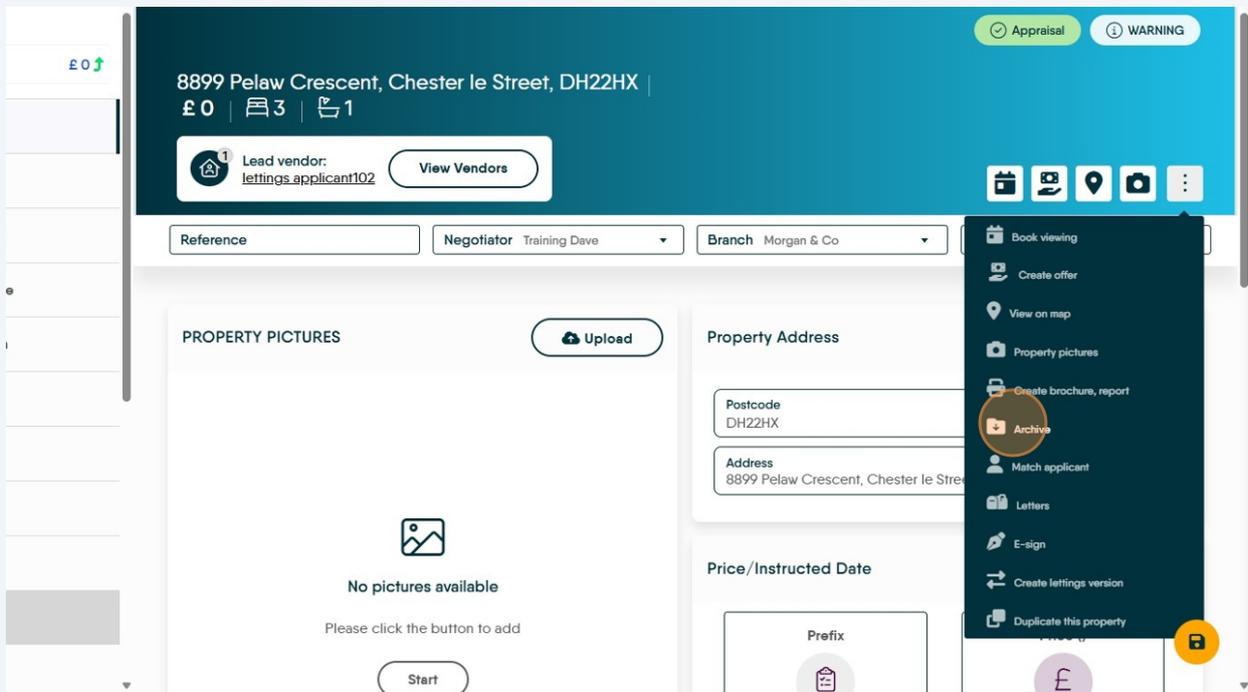
5 To archive the property. In the Vendor Record, Click "Properties"

6 Click the property to Archive

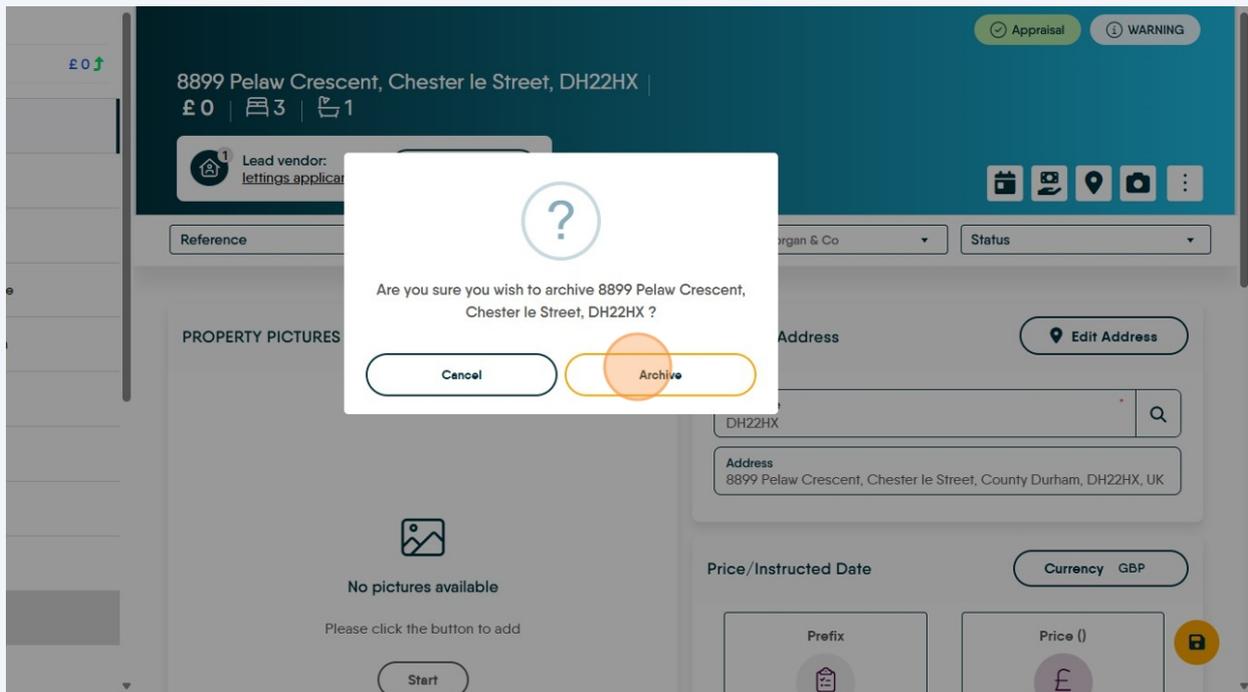
7 Click here.



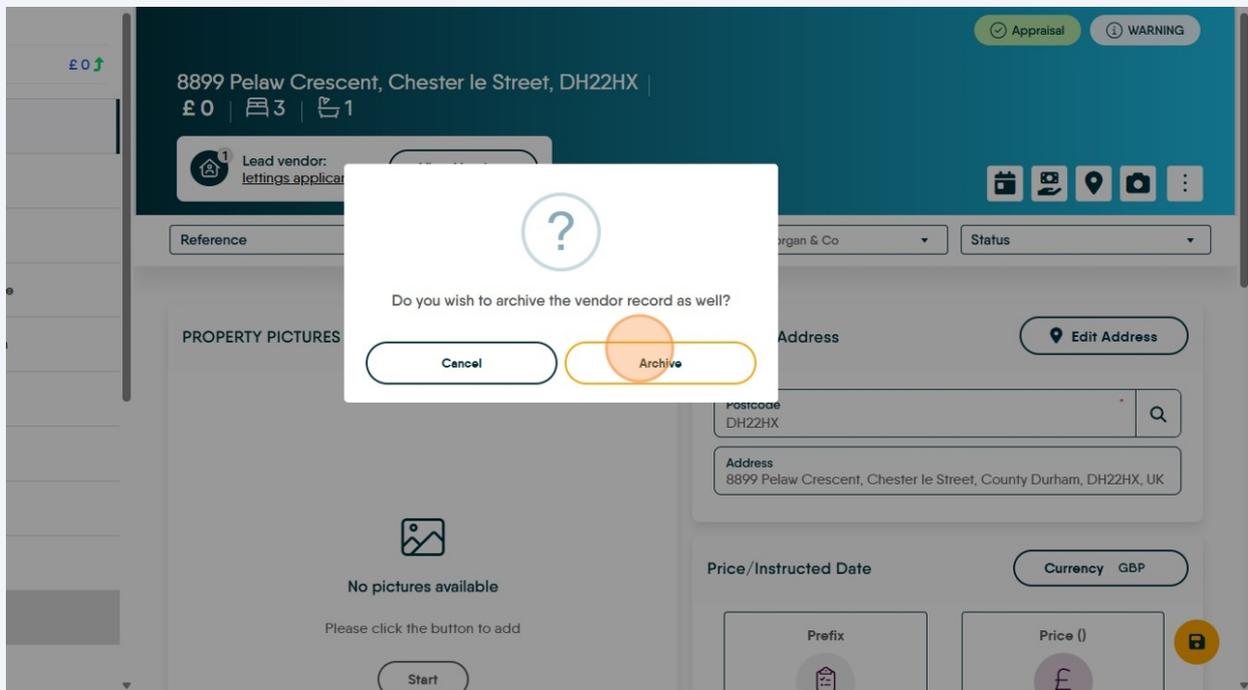
8 Click "Archive"



9 Click "Archive"



10 To also archive the Vendor. Click "Archive"



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

