

Adding a new Bank Account to CRM



This guide provides a straightforward method for adding a new bank account to your CRM.

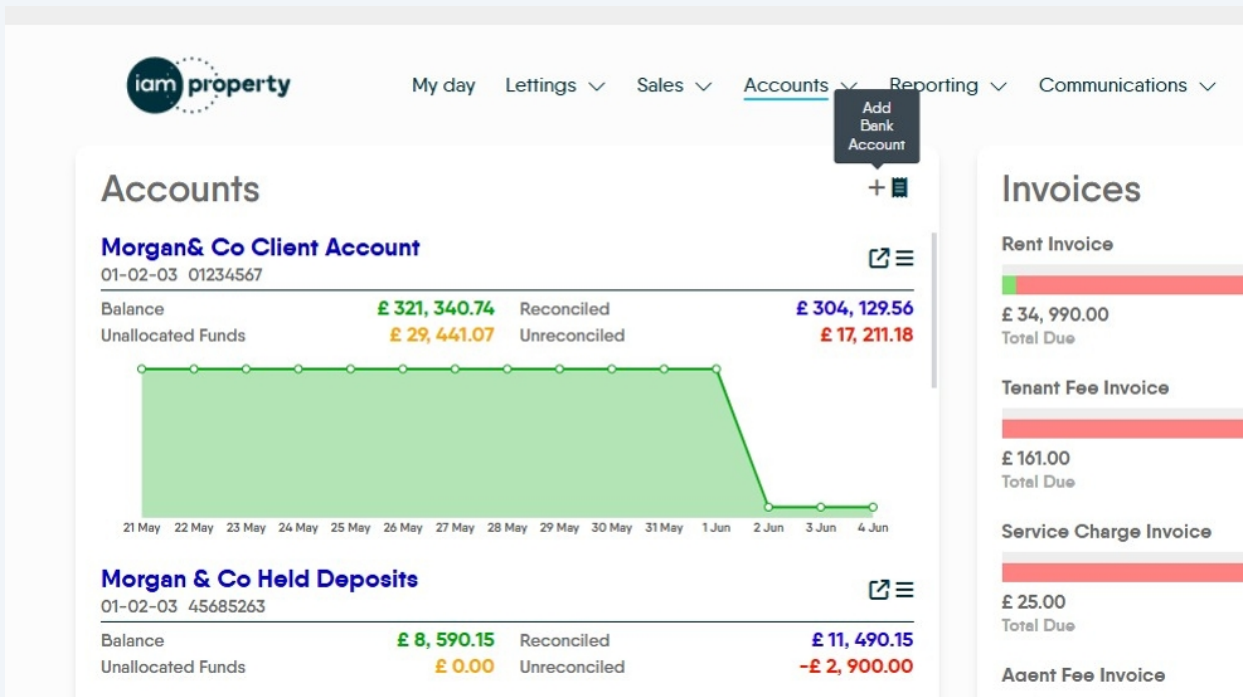
By following the clear, step-by-step instructions, users can avoid common errors.



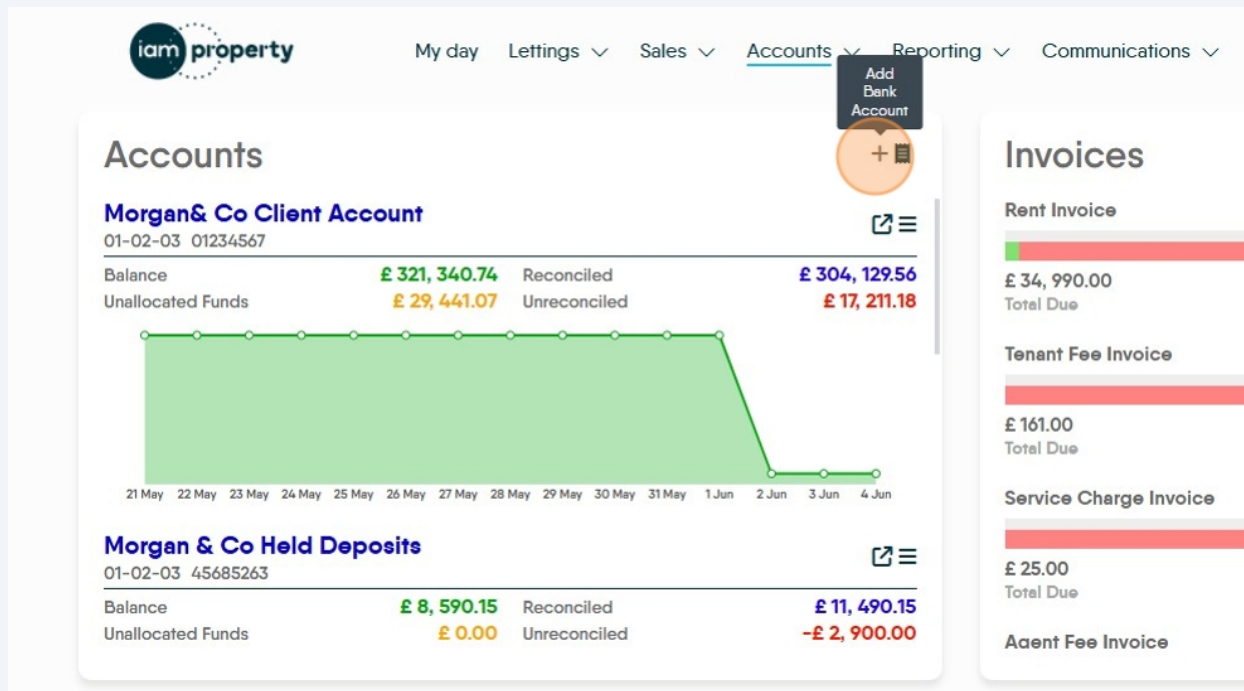
Alert! Only add accounts that are required and be sure of the data you are adding. If an error is made it can be edited. To remove an account contact CRM Support

1

Navigate to <https://crm.iamproperty.com/Dashboards/Accounts>



2 Click here.



3 Click the "Display As" field and add the name of your Bank Account or the name you wish to see in the CRM Accounts screen.

Add Bank Account

Display As
Enter Display As

Bank
Select Bank

Account Name
Enter Account Name

Sort Code
Enter Sort Code

Account Number
Enter Account Number

Branches
Select Branches

Cancel Save

- 4 Click "Select Bank" select your bank from the drop down menu

Add Bank Account ✕

Display As
Bank Account Name

Bank
Select Bank

Account Name
Enter Account Name

Sort Code
Enter Sort Code

Account Number
Enter Account Number

Branches
Select Branches

Cancel Save

Add Bank Account ✕

Display As
Bank Account Name

Bank
Select Bank

Account Name
Enter Account Name

Account Number
Enter Account Number

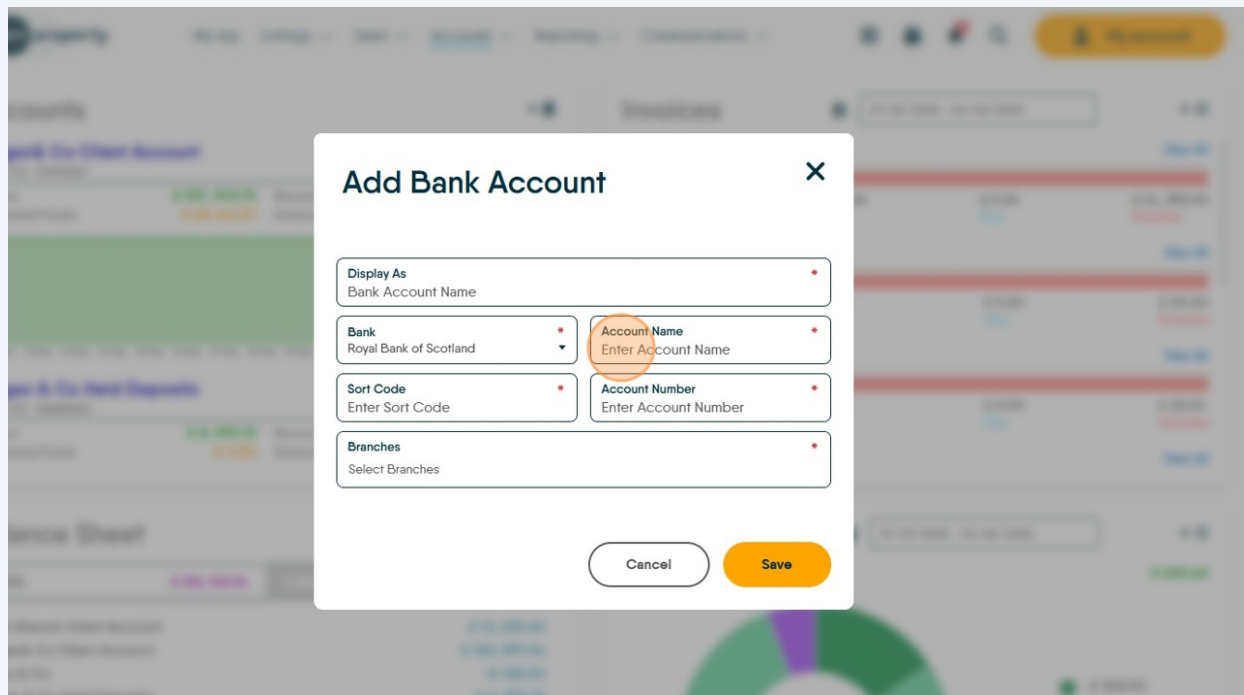
Barclays
HSBC
Lloyds Banking Group
Royal Bank of Scotland
Standard Chartered
NatWest

Cancel Save



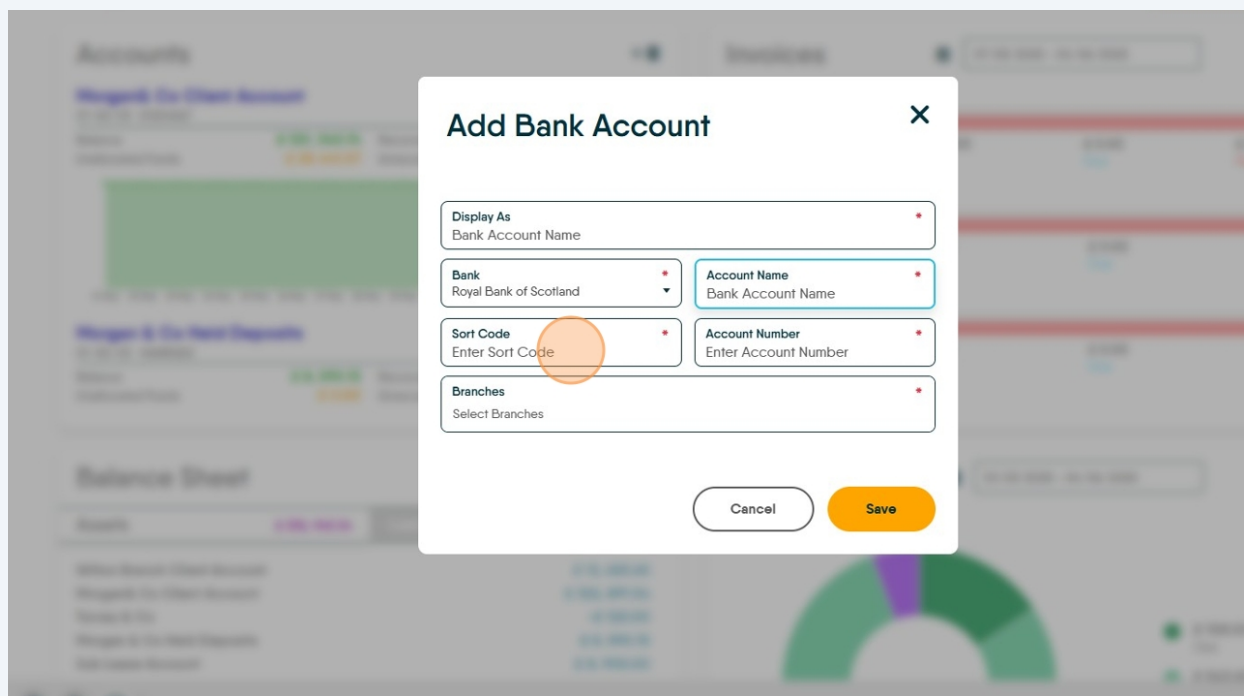
Tip! If your Bank is not in the list it can be added in the Accounts Lookup section of Configuration.

- 5 Click the "Account Name" field and add the name of your bank account.



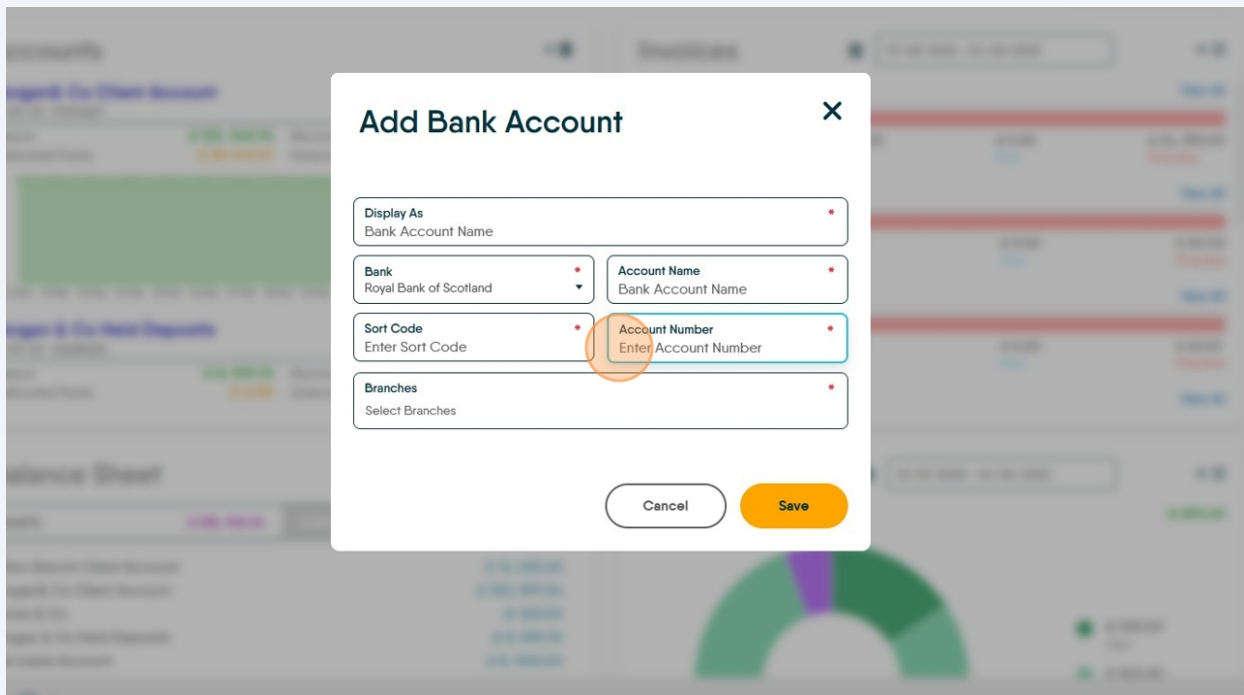
The screenshot shows a web application interface with a modal dialog titled "Add Bank Account". The dialog contains several input fields: "Display As" (with placeholder "Bank Account Name"), "Bank" (a dropdown menu showing "Royal Bank of Scotland"), "Account Name" (with placeholder "Enter Account Name"), "Sort Code" (with placeholder "Enter Sort Code"), "Account Number" (with placeholder "Enter Account Number"), and "Branches" (with placeholder "Select Branches"). The "Account Name" field is highlighted with an orange circle. At the bottom of the dialog are "Cancel" and "Save" buttons. The background shows a blurred view of the application's main content area, including a balance sheet and a pie chart.

- 6 Click the "Sort Code" field and add the Bank account sort code



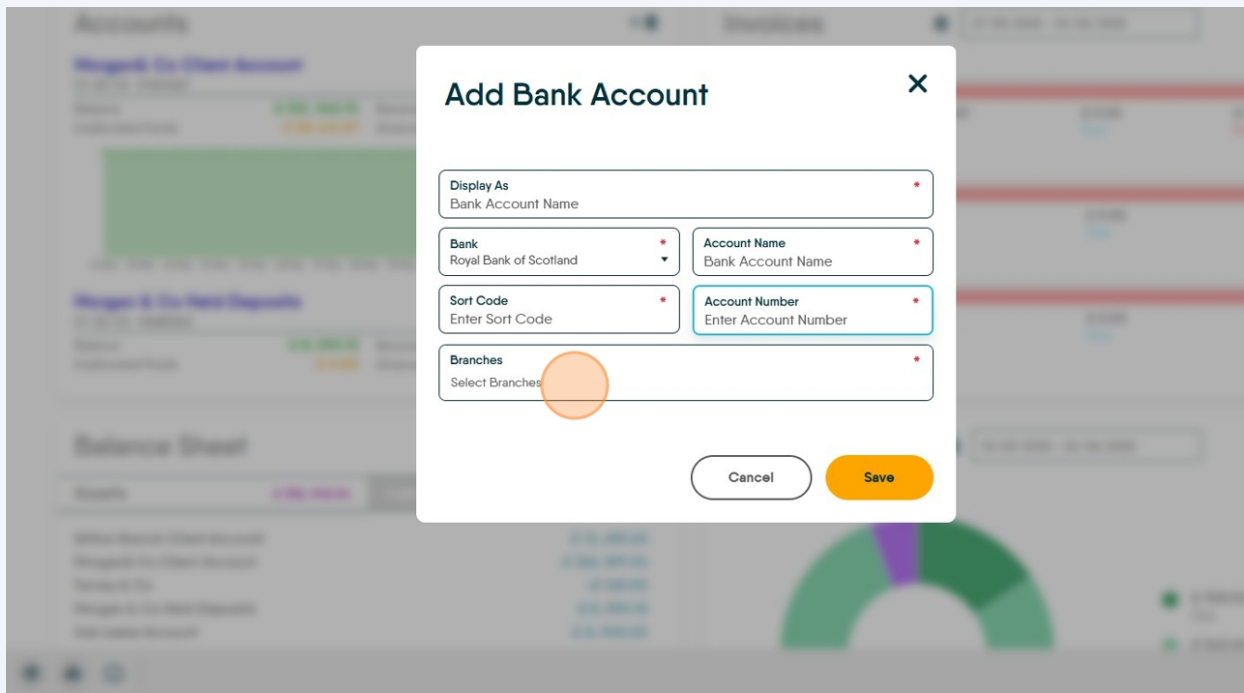
The screenshot shows the same "Add Bank Account" dialog box as in the previous step. In this step, the "Sort Code" field, which has the placeholder "Enter Sort Code", is highlighted with an orange circle. The "Account Name" field now contains the text "Bank Account Name". The "Display As", "Bank", "Account Number", and "Branches" fields remain unchanged. The "Cancel" and "Save" buttons are still at the bottom.

- 7 Click the "Account Number" field add the Bank Account number



The screenshot shows a modal window titled "Add Bank Account" with a close button (X) in the top right corner. The form contains several input fields: "Display As" (with placeholder text "Bank Account Name"), "Bank" (a dropdown menu showing "Royal Bank of Scotland"), "Account Name" (with placeholder text "Bank Account Name"), "Sort Code" (with placeholder text "Enter Sort Code"), "Account Number" (with placeholder text "Enter Account Number"), and "Branches" (with placeholder text "Select Branches"). The "Account Number" field is highlighted with an orange circle. At the bottom of the modal are "Cancel" and "Save" buttons.

- 8 Click here and set the Branches of your agency that this account relates to.



This screenshot shows the same "Add Bank Account" modal window. In this step, the "Branches" field, which has the placeholder text "Select Branches", is highlighted with an orange circle. All other fields and the "Cancel" and "Save" buttons remain visible and unchanged.

9

Click and select from the drop down menu. This menu only shows the branches that are currently active on YOUR login, to see other branches of your agency click the 'Bento' menu at the top of the screen and select 'Active Branches'

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10

Click "Save"

The screenshot shows the same "Add Bank Account" modal window. In this view, the "Branches" dropdown menu is closed, and the "Save" button at the bottom right of the modal is highlighted with an orange circle. The "Cancel" button is located to the left of the "Save" button.

11 The new account will show in the Accounts menu.

The screenshot shows the iamproperty CRM interface. The top navigation bar includes 'iamproperty', 'CRM', 'movebutler', and 'iam'. The main menu has 'My day', 'Lettings', 'Sales', 'Accounts', 'Reporting', and 'Communications'. The 'Accounts' menu is selected, showing a list of accounts. The first account is 'Morgan & Co Client Account' (01-02-03 01234567). It has a balance of £321,340.74, unallocated funds of £29,441.07, and reconciled/unreconciled amounts of £304,129.56 and £17,211.18 respectively. A green area chart shows the balance over time from May 21 to June 4. The second account is 'Morgan & Co Held Deposits' (01-02-03 45685263). It has a balance of £8,590.15, unallocated funds of £0.00, and reconciled/unreconciled amounts of £11,490.15 and -£2,900.00 respectively. Below the accounts list is a 'Balance Sheet' section showing Assets of £352,945.34 and Liabilities of £352,945.34. The 'Invoices' section shows a list of invoices for the period 07/05/2025 - 04/06/2025, including Rent Invoice, Tenant Fee Invoice, Service Charge Invoice, and Agent Fee Invoice. The 'Expenses' section shows a pie chart for the period 01/03/2025 - 04/06/2025.

12 Click here.

This screenshot is identical to the one above, showing the iamproperty CRM interface with the 'Accounts' menu selected. The 'Morgan & Co Client Account' is highlighted with a red circle, indicating the link to click. The interface shows the account details, balance sheet, invoices, and expenses for the selected account.