

Core Process Simplification - Adding a New Sales Property in CRM



Using the NEW Core Process Simplification screens.

This guide provides a straightforward, step-by-step approach to adding a new sales property in the CRM system. It simplifies what can be a complex task into manageable actions, ensuring users can efficiently navigate the CRM platform. By following these steps, users can save time, reduce errors, and enhance their productivity in managing sales applicants.

1 Navigate to <https://crm.iamproperty.com/MyDay>

The screenshot shows the 'MyDay' dashboard in the CRM system. At the top, there's a navigation bar with the 'iam property' logo, menu items (My day, Lettings, Sales, Accounts, Reporting, Communications), and user account information. Below the navigation bar, a large 'Welcome back, Training' message is displayed. Underneath, there are three main action buttons: '+ Add New Record' (orange), 'View Property Management' (green), and 'Visit Help Centre' (blue). A search bar labeled 'Search all records' is positioned below these buttons. The dashboard is divided into two main sections: 'Today's events' on the left and 'My tasks' on the right. The 'Today's events' section shows a single event at 12:00 named 'Test test'. The 'My tasks' section displays a table of tasks with columns for Status, Name, Priority, Start date, and Due date.

Status	Name	Priority	Start date	Due date
Not Started	Call Landlord	High	15/Nov/2024	15/Nov/2024
Not Started	test	High	27/Nov/2024	27/Nov/2024
Not Started	Call Landlord	Medium	12/Dec/2024	12/Dec/2024
Not Started	Call back	High	03/Jan/2025	03/Jan/2025

2 Click "Bento" button.

The screenshot shows the CRM dashboard with the 'Bento' button (a grid icon) highlighted in the top right navigation bar. The dashboard includes a header with user information and a main content area with a search bar and two tables: 'My events' and 'My tasks'.

My events

Name
Test test

My tasks

Status	Name	Priority	Start date	Due date
Not Started	Call Landlord	High	15/Nov/2024	15/Nov/2024
Not Started	test	High	27/Nov/2024	27/Nov/2024
Not Started	Call Landlord	Medium	12/Dec/2024	12/Dec/2024

3 From the menu click "Add new record"

The screenshot shows the CRM dashboard with the 'Add new record' option highlighted in the menu. The menu is open, showing options like 'Active branches', 'Calendar', 'Add new record', 'Calls', 'Contacts', 'Events', 'Notes', and 'Tasks'.

My events

Name
Test test

My tasks

Status	Name	Priority	Start date	Due date
Not Started	Call Landlord	High	15/Nov/2024	15/Nov/2024
Not Started	test	High	27/Nov/2024	27/Nov/2024
Not Started	Call Landlord	Medium	12/Dec/2024	12/Dec/2024

4 OR Click "Add New Record" on the 'My Day' screen

The screenshot shows the 'My Day' screen of the ian property CRM. The top navigation bar includes 'iam property', 'My day', 'Lettings', 'Sales', 'Accounts', 'Reporting', and 'Communications'. The main heading is 'Welcome back, Training'. Below this, there are three buttons: '+ Add New Record' (highlighted with an orange circle), 'View Property Management', and 'Visit Help Centre'. A search bar labeled 'Search all records' is present. Below the search bar, there are two sections: 'Today's events' and 'My tasks'. The 'Today's events' section shows a table with columns 'Time' and 'Name', containing one entry: '12:00' and 'Test test'. The 'My tasks' section shows a table with columns 'Status', 'Name', 'Priority', 'Start date', and 'Due date', containing three entries: 'Not Started', 'Call Landlord', 'High', '15/Nov/2024', '15/Nov/2024'; 'Not Started', 'test', 'High', '27/Nov/2024', '27/Nov/2024'; and 'Not Started', 'Call Landlord', 'Medium', '12/Dec/2024', '12/Dec/2024'.

Time	Name
12:00	Test test

Status	Name	Priority	Start date	Due date
Not Started	Call Landlord	High	15/Nov/2024	15/Nov/2024
Not Started	test	High	27/Nov/2024	27/Nov/2024
Not Started	Call Landlord	Medium	12/Dec/2024	12/Dec/2024

5 Click "Sales Property"

The screenshot shows the 'Add New Record' modal in the ian property CRM. The modal has two sections: 'Select appointment type' and 'Select record type'. The 'Select appointment type' section has three options: 'Sales Appraisal', 'Lettings Appraisal', and 'Sales Viewing (coming soon)'. The 'Select record type' section has three options: 'Sales Applicant', 'Lettings Applicant', and 'Sales Property' (highlighted with an orange circle). The background shows the 'My tasks' table from the previous screenshot.

Start date	Due date
15/Nov/2024	15/Nov/2024
27/Nov/2024	27/Nov/2024
12/Dec/2024	12/Dec/2024
03/Jan/2025	03/Jan/2025
07/Jan/2025	07/Jan/2025

- 6 Click the "Address *" field. Type the Property postcode or select

< [Back to my day](#) >> Create Sales Property

Create Sales Property

Sales Property

Address *

Or Enter Address Manually

Property type

Property age

Occupier

Branch *

Negotiator *

Bedrooms

Bathrooms

Receptions

1 Property

2 Vendor

- 7 Click the "Property type" and select from the drop down menu.

< [Back to my day](#) >> Create Sales Property

Create Sales Property

Sales Property

Property type

Property age

Occupier

Branch *

Negotiator *

Bedrooms

Bathrooms

Receptions

1 Property


2 Vendor

- 8 Select the "Property Age" from the drop down menu.




< [Back to my day](#) >> Create Sales Property

Create Sales Property



Sales Property

72 Pelaw Crescent Chester le Street County Durham DH22HX 

Property type Property age Occupier

Detached House  Post-war  

Branch * Negotiator *

Morgan & Co  Training Dave 

Bedrooms Bathrooms Receptions


- 1 Property
- 2 Vendor

- 9 Select the "Occupier" type from the drop down menu.




[my day](#) >> Create Sales Property

Create Sales Property



Sales Property

72 Pelaw Crescent Chester le Street County Durham DH22HX 

Property type Property age Occupier

Detached House  Post-war  Tenant 

Branch * Negotiator *

Morgan & Co  Training Dave 

Bedrooms Bathrooms Receptions

- 1 Property
- 2 Vendor

10 Check and Update the Branch and Negotiator details.

Add the Bedroom/Bathroom/Receptions details Then click "Continue"

Sales Property

72 Pelaw Crescent Chester le Street County Durham DH22HX

Property type

Detached House

Property age

Post-war

Occupier

Tenant

Branch *

Morgan & Co

Negotiator *

Training Dave

Bedrooms

3

Bathrooms

1

Receptions

2

Cancel

Continue

- 1 Property
- 2 Vendor

Adding Primary Vendor Information

11 Select the "Miss" option.

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My day Lettings Sales Accounts Reporting Communications

Primary Vendor [Use Existing Record](#)

Title **Miss** Forename * Surname *

Email * Mobile phone

Phone number Work phone

Branch * Negotiator *

Morgan & Co Training Dave

☐ Vendor's address is different to the property

1 Property

2 Vendor

12 Click here and add the Forename, Surname and email address. If the email address has been used previously in CRM you will see this screen showing the original records and giving you the option to merge or use the data from the other record to save you duplicating work.

Click "Create new record" if you want to manually create a new client record with the duplicate email address

iamproperty CRM movebutler

My day Lettings Sales Accounts Reporting Communications

Primary Vendor [Use Existing Record](#)

Title **Miss** Forename * Surname *

Email * Mobile phone

Phone number Work phone

Branch * Negotiator *

Morgan & Co Training Dave

☐ Vendor's address is different to the property

1 Property

2 Vendor

Primary Vendor

Title

Miss

▼

Forename *

David

Email *

crm.training@iamproperty.com

Phone number

Branch *

Morgan & Co

▼

☐ Vendor's address is different to the property

Add Another Vendor

⚠

Merge with existing record

The following records have the same email address.
Select the record you'd like to use/merge with or create a new record.

David Morgan

Landlord

Use/Merge

David Morgan

Landlord

Use/Merge

David Morgan

Lettings Applicant

Use/Merge

David Morgan

Sales Applicant

Use/Merge

Or

Create New Record

ing Record

1

Property

2

Vendor

13 Add the Mobile Number and Phone Number for the Vendor.

Primary Vendor

Use Existing Record

Title

Miss

▼

Forename *

David

Surname *

Morgan

Email *

crm.training@iamproperty.com

Mobile phone

07802200655

Phone number

Work phone

Branch *

Morgan & Co

▼

Negotiator *

Training Dave

▼

☐ Vendor's address is different to the property

Add Another Vendor

Cancel

Create Property

1

Property

2

Vendor

8



Tip! If the main contact number is a mobile phone number then add the number to both the Mobile Phone and the Phone Number fields. This applies to all Vendors.

This enables the the CRM to understand how to both show a contact number and send SMS messages to the Applicant.

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If the "Vendor's address is different to the property" click the option and add the Vendors current address. If the addresses are the same ignore this option.

Primary Vendor [Use Existing Record](#)

Title *	Forename *	Surname *
<input type="text" value="Miss"/>	<input type="text" value="David"/>	<input type="text" value="Morgan"/>
Email *		Mobile phone
<input type="text" value="crm.training@iamproperty.com"/>		<input type="text" value="07802200655"/>
Phone number		Work phone
<input type="text" value="01865860873"/>		<input type="text"/>
Branch *		Negotiator *
<input type="text" value="Morgan & Co"/>		<input type="text" value="Training Dave"/>
<input type="checkbox"/> Vendor's address is different to the property		
Add Another Vendor		
<input type="button" value="Cancel"/>		<input type="button" value="Create Property"/>

- 1 Property
- 2 Vendor

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To add the Vendors address, click the "Search postcode" field. Select the postcode from the list or click '...Enter Address Manually' to enter/edit the address

The form contains the following fields and options:

- Title**: Miss (dropdown)
- Forename**: David
- Surname**: Morgan
- Email**: crm.training@iamproperty.com
- Mobile phone**: 07802200655
- Phone number**: 01865860873
- Work phone**: (empty)
- Branch**: Morgan & Co (dropdown)
- Negotiator**: Training Dave (dropdown)
- ☒ Vendor's address is different to the property
- Search postcode**: Enter a full postcode (text input with a search icon)
- [Or Enter Address Manually](#)
- [Add Another Vendor](#)
- [Cancel](#)
- [Create Property](#)

- 1 Property
- 2 Vendor



Tip! If there is a second (or more) Vendor then it is good practice to add the second vendor as a new record. EVEN WHEN the client is a married couple.

Any additional vendors can be added in the Property Record via the Vendor tab at the top of the Property Record Screen.

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If there is a second vendor, click "Add another vendor" and follow the process for adding a new Vendor (sames as previous)

Primary Vendor Use Existing Record

Title Forename* Surname*

Email* Mobile phone

Phone number Work phone

Branch* Negotiator*

☐ Vendor's address is different to the property

Add Another Vendor Cancel Create Property

1 Property

2 Vendor

17

If the Vendor is an existing client click here and search for the client.

Morgan

crm.training@iamproperty.com

Phone number: 01865860873

Branch: Morgan & Co

Phone: 07802200655

Negotiator: Training Dave

Same as property

To edit the
Primary Vendor
click here

Primary Vendor Use Existing Record

Title Forename* Surname*

Email* Mobile phone

Phone number Work phone

1 Property

2 Vendor

- 18 Once the Second Vendor is added (if required) click the Create Property button.

The screenshot shows a form for creating a property record. It has three main input sections: 'Mobile phone' with two adjacent text boxes, 'Work phone' with two adjacent text boxes, and 'Negotiator' which is a dropdown menu currently showing 'Training Dave'. Below these fields is a 'Property' label. At the bottom of the form are two buttons: 'Cancel' and 'Create Property'. The 'Create Property' button is highlighted with an orange circle.



Tip! Although this has created a new record it is still a basic record. There are still fields that need to be completed within the CRM Vendor record, for example you may have a Checklist enabled or UDF that need completion.