

Core Process Simplification - Adding a New Sales Property in CRM



Using the NEW Core Process Simplification screens.

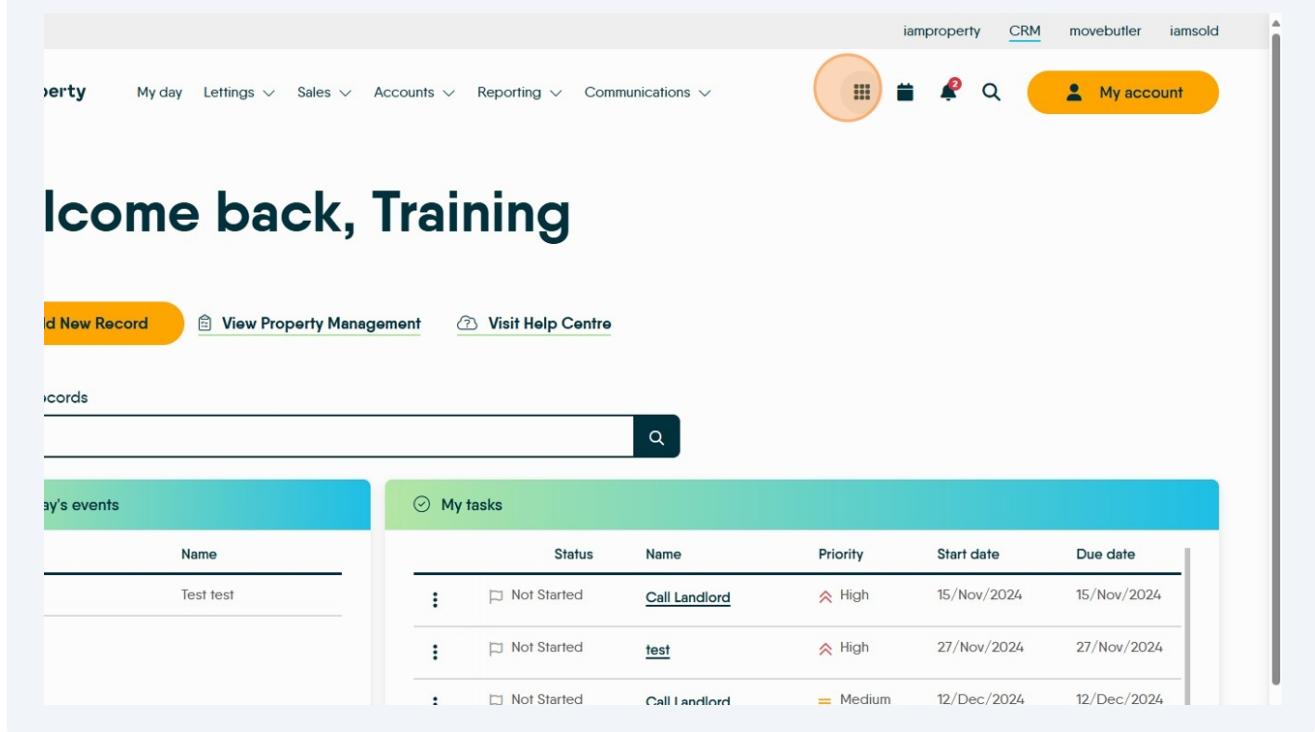
This guide provides a straightforward, step-by-step approach to adding a new sales property in the CRM system. It simplifies what can be a complex task into manageable actions, ensuring users can efficiently navigate the CRM platform. By following these steps, users can save time, reduce errors, and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

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

The screenshot shows the 'My Day' dashboard of the iam property CRM. At the top, there is a navigation bar with links for 'My day', 'Lettings', 'Sales', 'Accounts', 'Reporting', 'Communications', and a 'My account' dropdown. Below the navigation bar, a large 'Welcome back, Training' message is displayed. On the left, there is a 'Today's events' section with a table showing a single event at 12:00 with the name 'Test test'. On the right, there is a 'My tasks' section with a table showing four tasks. The tasks are:

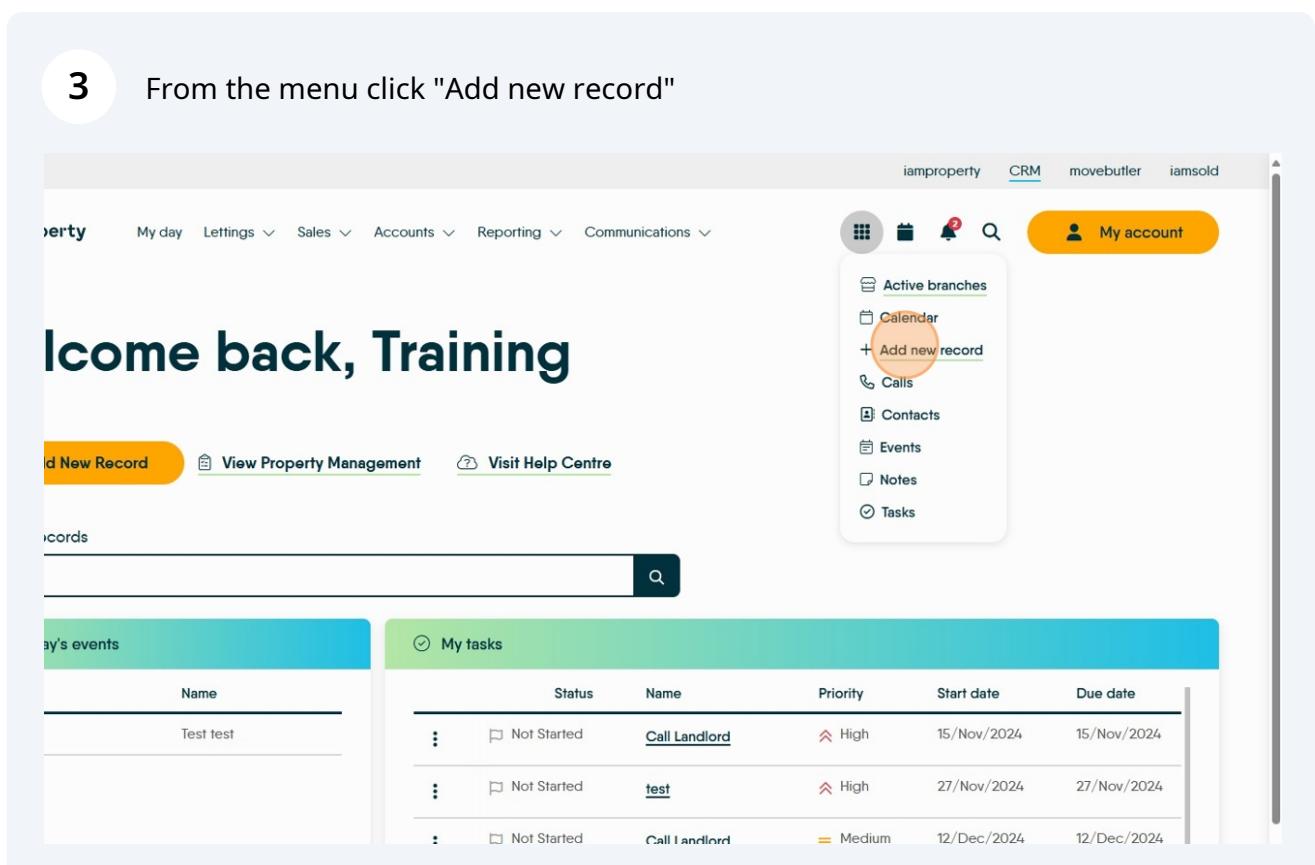
	Status	Name	Priority	Start date	Due date
⋮	Not Started	Call Landlord	High	15/Nov/2024	15/Nov/2024
⋮	Not Started	test	High	27/Nov/2024	27/Nov/2024
⋮	Not Started	Call Landlord	Medium	12/Dec/2024	12/Dec/2024
⋮	Not Started	Call back	High	03/Jan/2025	03/Jan/2025

2 Click "Bento" button.



The screenshot shows the iProperty software interface. At the top, there is a navigation bar with links: 'My day', 'Lettings', 'Sales', 'Accounts', 'Reporting', and 'Communications'. On the right side of the top bar are icons for 'iamproperty', 'CRM', 'movebutler', and 'iamsold'. Below the top bar, there is a search bar and a 'My account' button. The main content area features a large title 'Icome back, Training' and two sections: 'My events' and 'My tasks'. The 'My tasks' section is highlighted with a red circle around the 'Bento' button in the top right corner. The tasks listed are: 'Call Landlord' (Status: Not Started, Priority: High, Due date: 15/Nov/2024), 'test' (Status: Not Started, Priority: High, Due date: 27/Nov/2024), and 'Call Landlord' (Status: Not Started, Priority: Medium, Due date: 12/Dec/2024).

3 From the menu click "Add new record"



The screenshot shows the iProperty software interface. At the top, there is a navigation bar with links: 'My day', 'Lettings', 'Sales', 'Accounts', 'Reporting', and 'Communications'. On the right side of the top bar are icons for 'iamproperty', 'CRM', 'movebutler', and 'iamsold'. Below the top bar, there is a search bar and a 'My account' button. A context menu is open in the top right corner, with the 'Add new record' option highlighted with a red circle. The main content area features a large title 'Icome back, Training' and two sections: 'My events' and 'My tasks'. The 'My tasks' section is shown below the menu. The tasks listed are: 'Call Landlord' (Status: Not Started, Priority: High, Due date: 15/Nov/2024), 'test' (Status: Not Started, Priority: High, Due date: 27/Nov/2024), and 'Call Landlord' (Status: Not Started, Priority: Medium, Due date: 12/Dec/2024).

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

Search all records

Today's events

Time	Name
12:00	Test test

My tasks

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

5 Click "Sales Property"

Select appointment type

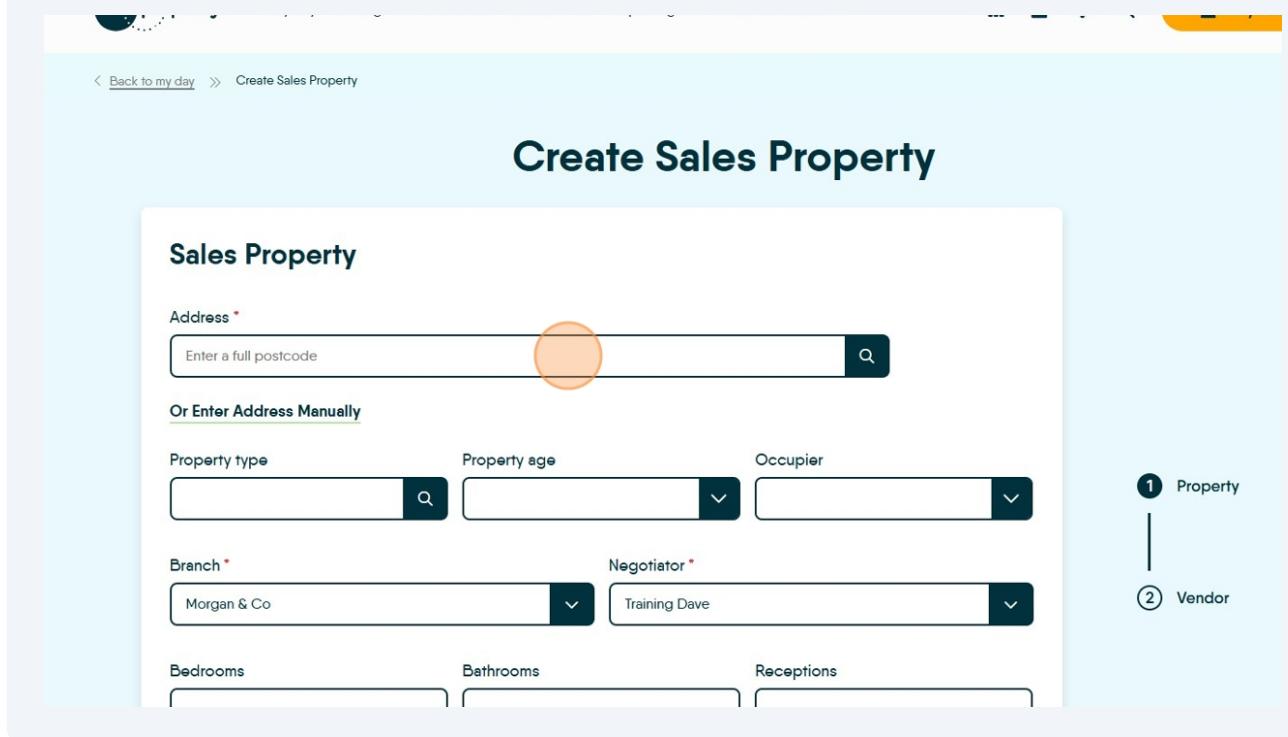
- Sales Appraisal
- Lettings Appraisal
- Sales Viewing (coming soon)
- Lettings Viewing (coming soon)

Select record type

- Sales Applicant
- Lettings Applicant
- Sales Property

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 *

Enter a full postcode

Or Enter Address Manually

Property type Property age Occupier

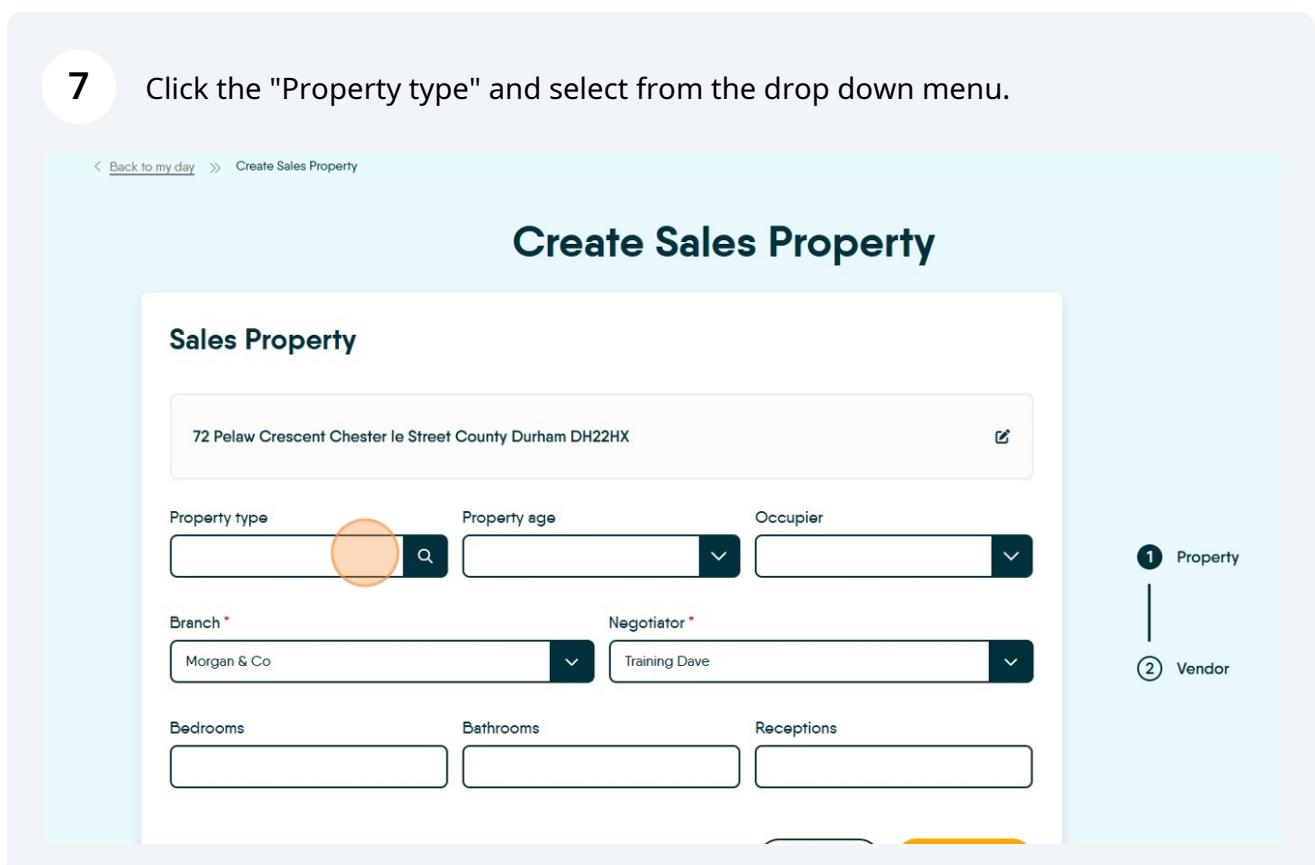
Branch * Negotiator *

Morgan & Co Training Dave

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

72 Pelaw Crescent Chester le Street County Durham DH22HX

Property type Property age Occupier

Branch * Negotiator *

Morgan & Co Training Dave

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: Detached House

Property age: Post-war

Occupier: (dropdown menu)

Branch: Morgan & Co

Negotiator: Training Dave

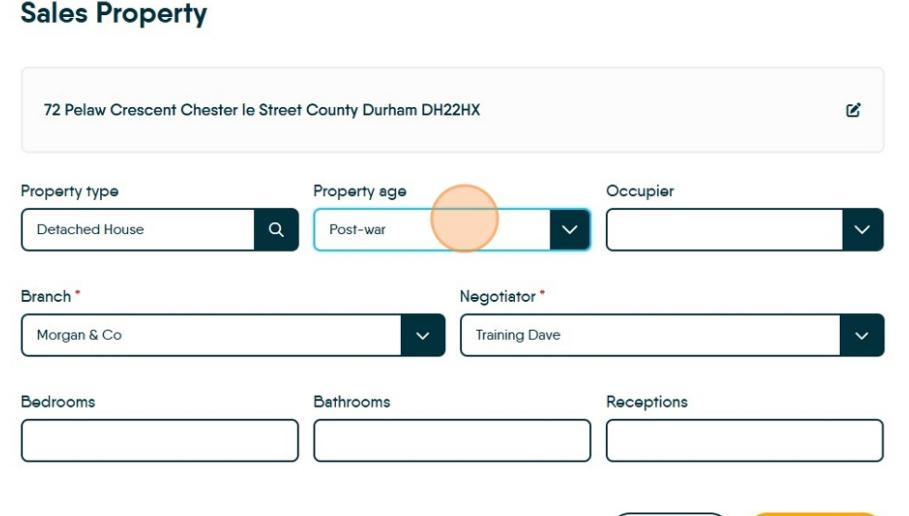
Bedrooms: (input field)

Bathrooms: (input field)

Receptions: (input field)

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: Detached House

Property age: Post-war

Occupier: Tenant (highlighted with a red circle)

Branch: Morgan & Co

Negotiator: Training Dave

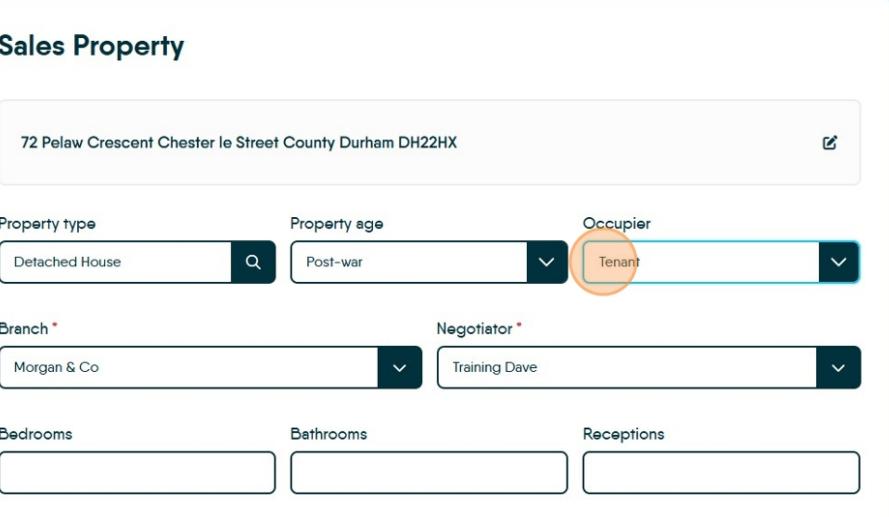
Bedrooms: (input field)

Bathrooms: (input field)

Receptions: (input field)

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.

Primary Vendor

Use Existing Record

Title: Miss

Forename:

Surname:

Email:

Mobile phone:

Phone number:

Work phone:

Branch: Morgan & Co

Negotiator: 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

Primary Vendor

Use Existing Record

Title: Miss

Forename:

Surname:

Email:

Mobile phone:

Phone number:

Work phone:

Branch: Morgan & Co

Negotiator: Training Dave

Vendor's address is different to the property

1 Property

2 Vendor

Primary 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.

Record Details	Action
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

1 Property
2 Vendor

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

Primary Vendor

Use Existing Record

Title	Forename *	Surname *
Miss	David	Morgan
Email *	Mobile phone	
crm.training@iamproperty.com	07802200655	
Phone number	Work phone	
<input type="text"/>		
Branch *	Negotiator *	
Morgan & Co	Training Dave	

Vendor's address is different to the property

Add Another Vendor **Cancel** **Create Property**

1 Property
2 Vendor



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.

14

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

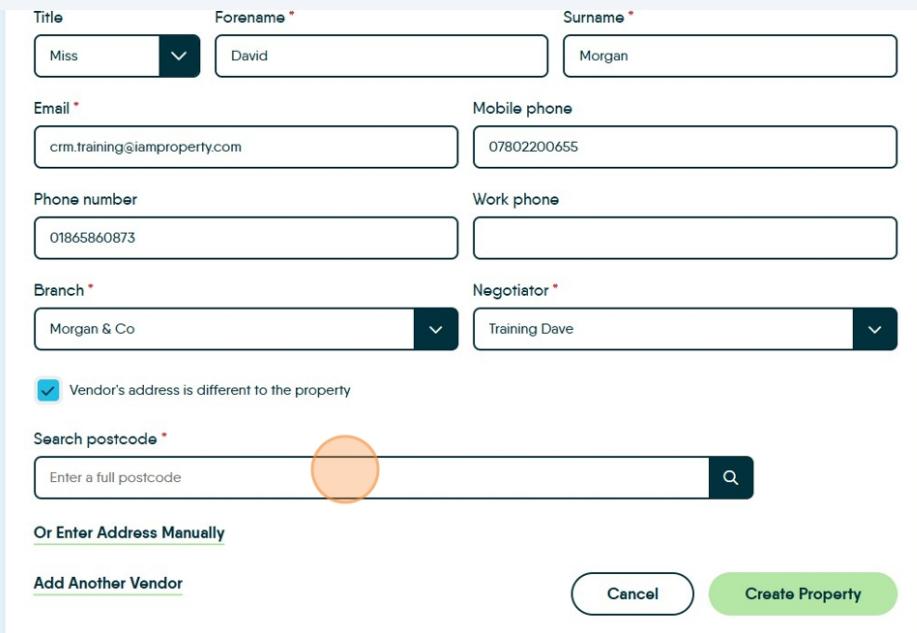
[Use Existing Record](#)

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

1 Property
2 Vendor

15

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 screenshot shows a form for adding a vendor. The fields are as follows:

- Title:** Miss
- Forename:** David
- Surname:** Morgan
- Email:** crm.training@iamproperty.com
- Mobile phone:** 07802200655
- Phone number:** 01865860873
- Work phone:** (empty)
- Branch:** Morgan & Co
- Negotiator:** Training Dave
- Vendor's address is different to the property:**
- Search postcode:** (This field is highlighted with an orange circle)
- Or Enter Address Manually:** (link)
- Add Another Vendor:** (link)
- Cancel:** (button)
- Create Property:** (button)

On the right, a vertical callout diagram shows a line from the 'Search postcode' field to a numbered list:

- 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.

16

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](#)

1 Property
2 Vendor

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

17

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

[Use Existing Record](#)

To edit the Primary Vendor click here

1 Property
2 Vendor

Secondary Vendor

Forename *	Surname *
<input type="button" value="▼"/>	
Mobile phone	
Work phone	

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

Mobile phone

Work phone

Negotiator *

Training Dave

Cancel Create Property



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.