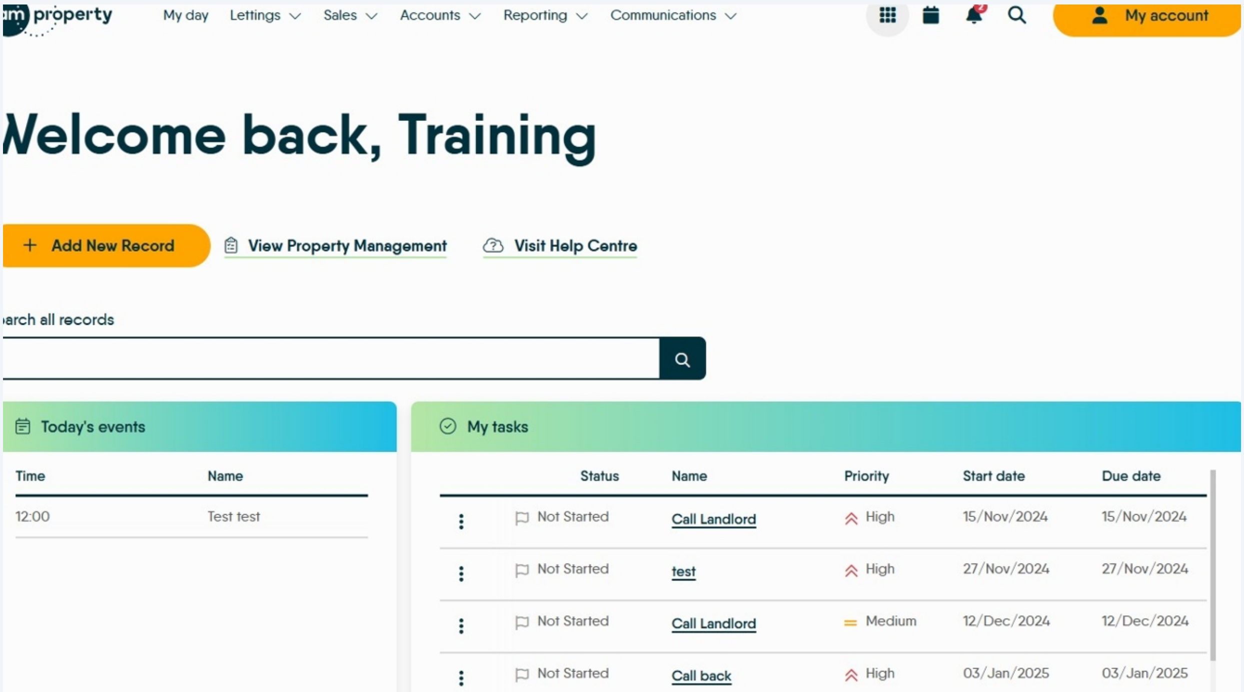
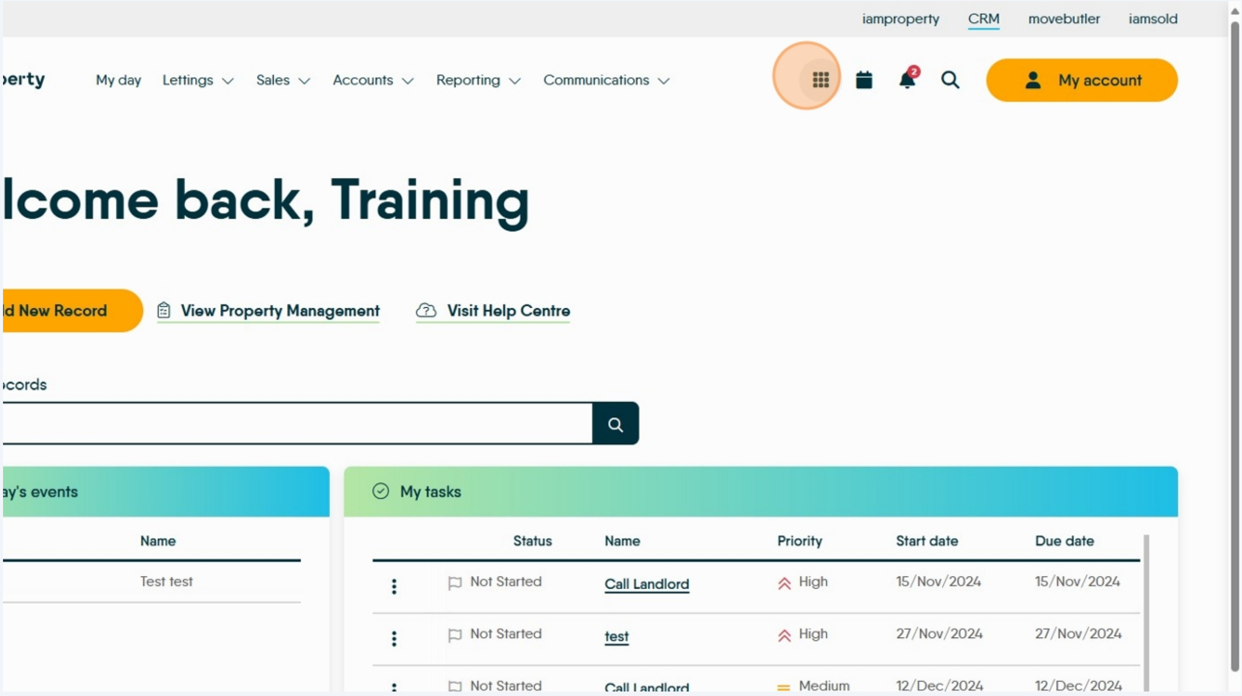
Core Process Simplification - Adding a New Sales Applicant in CRM System

Using the NEW Core Process Simplification screens. This guide provides a straightforward, step-by-step approach to adding a new sales applicant 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.

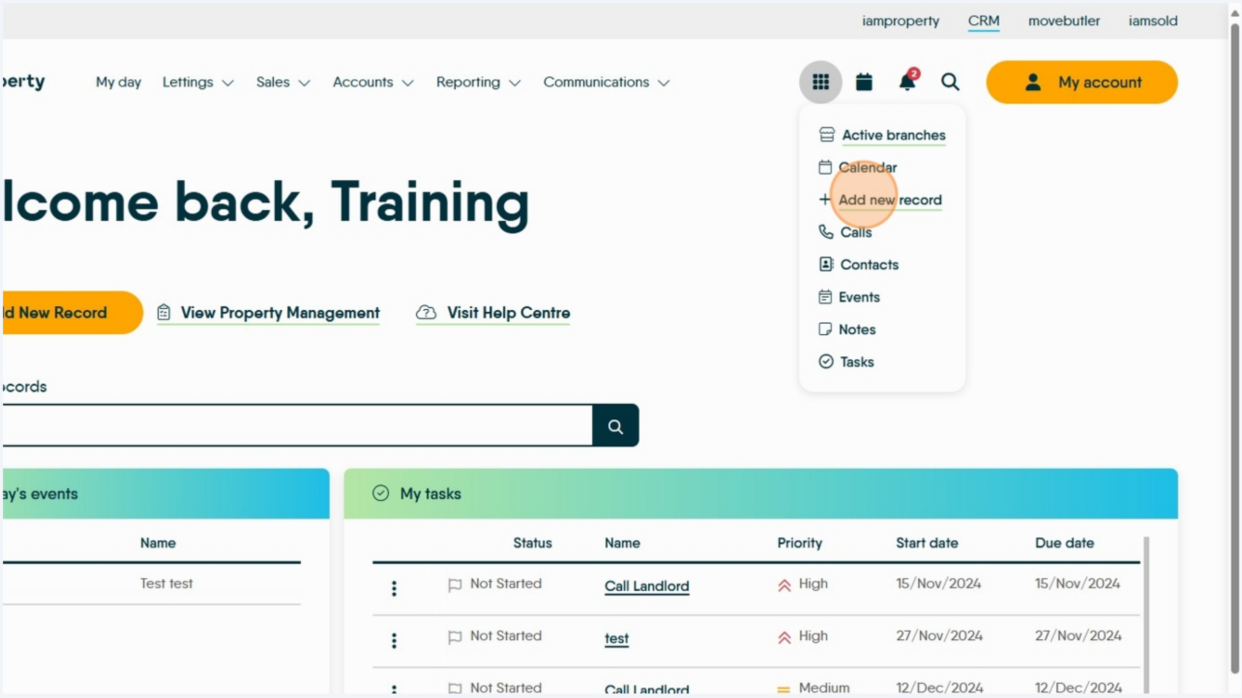
1 Navigate to https://crm.iamproperty.com/MyDay



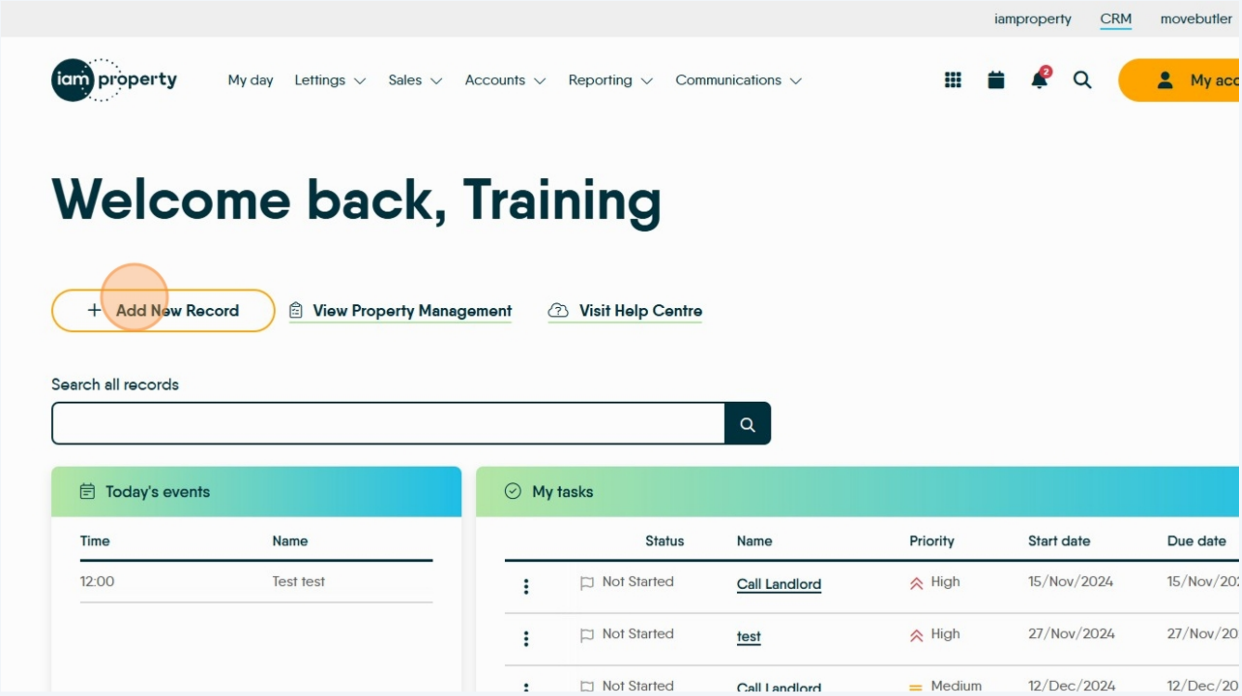
2 Click "Bento" button



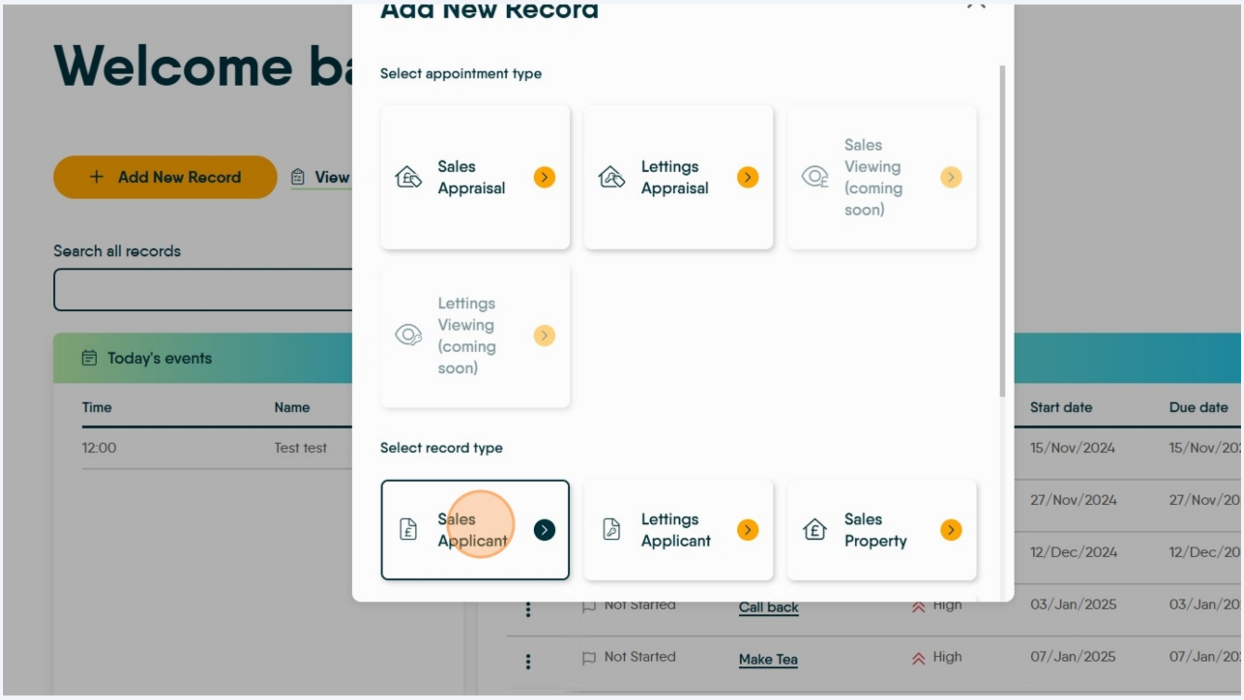
3 Click "Add new record"



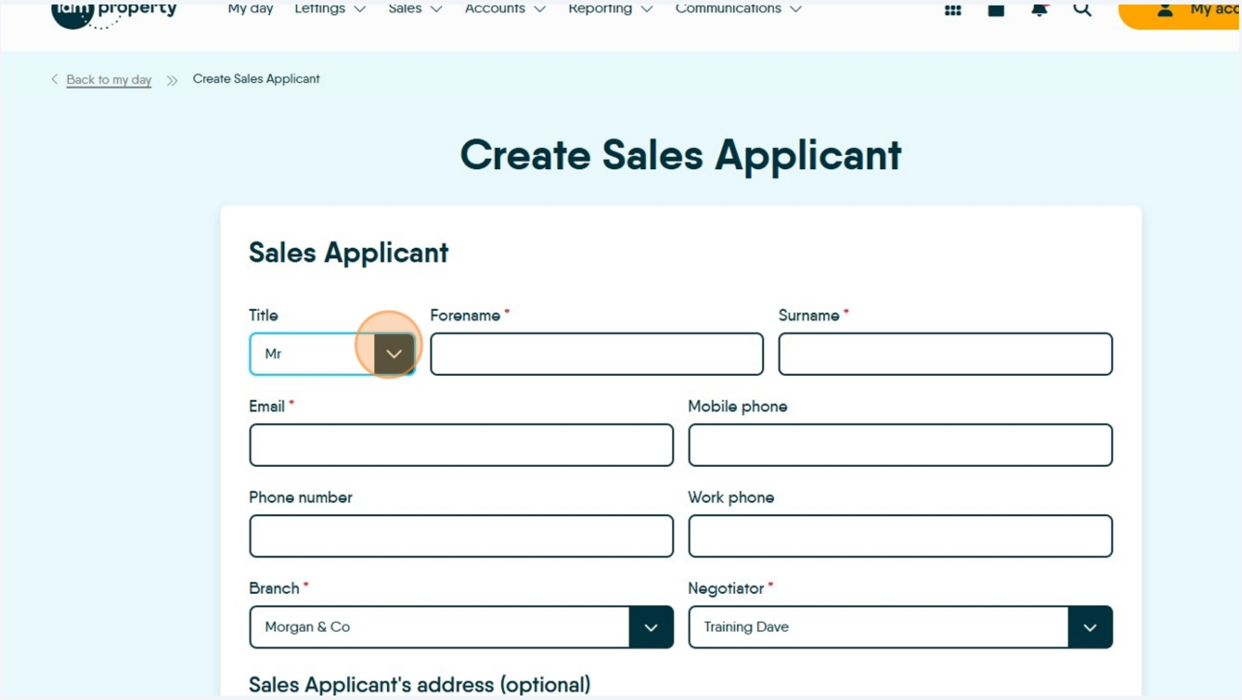
4 Click "Add New Record"



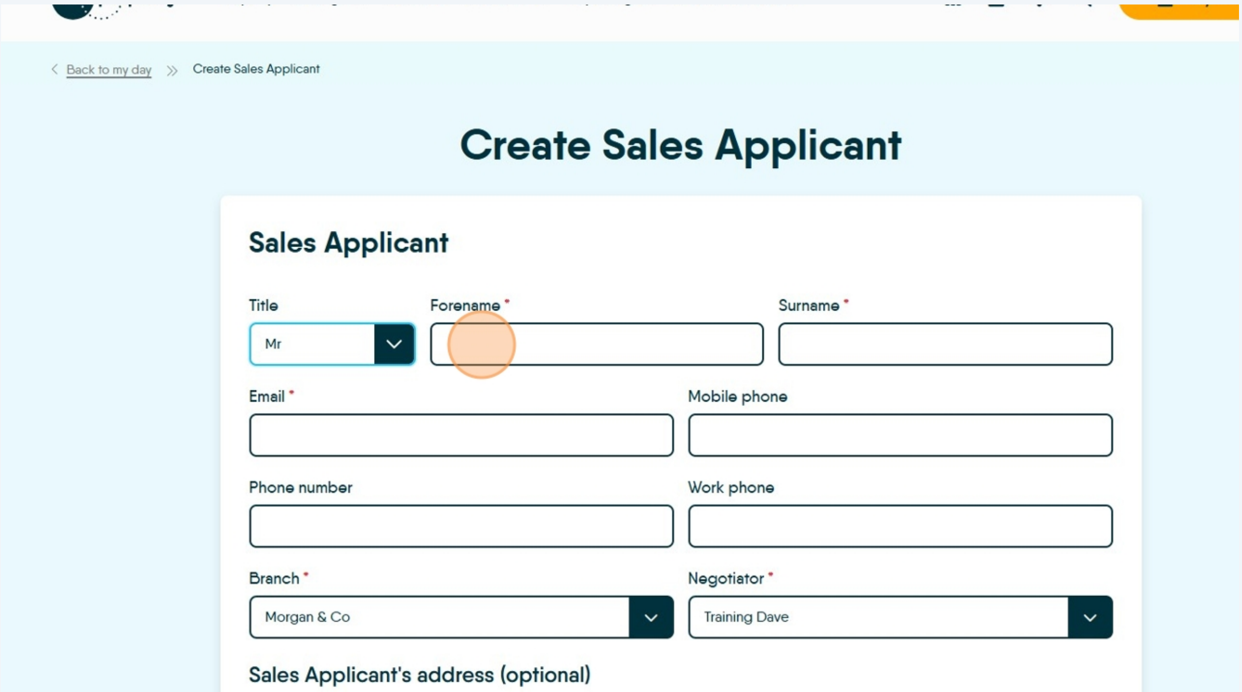
5 Click "Sales Applicant"



6 Select the "Mr" option.



7 Click this text field and add the Applicant Forename and continue through the screen



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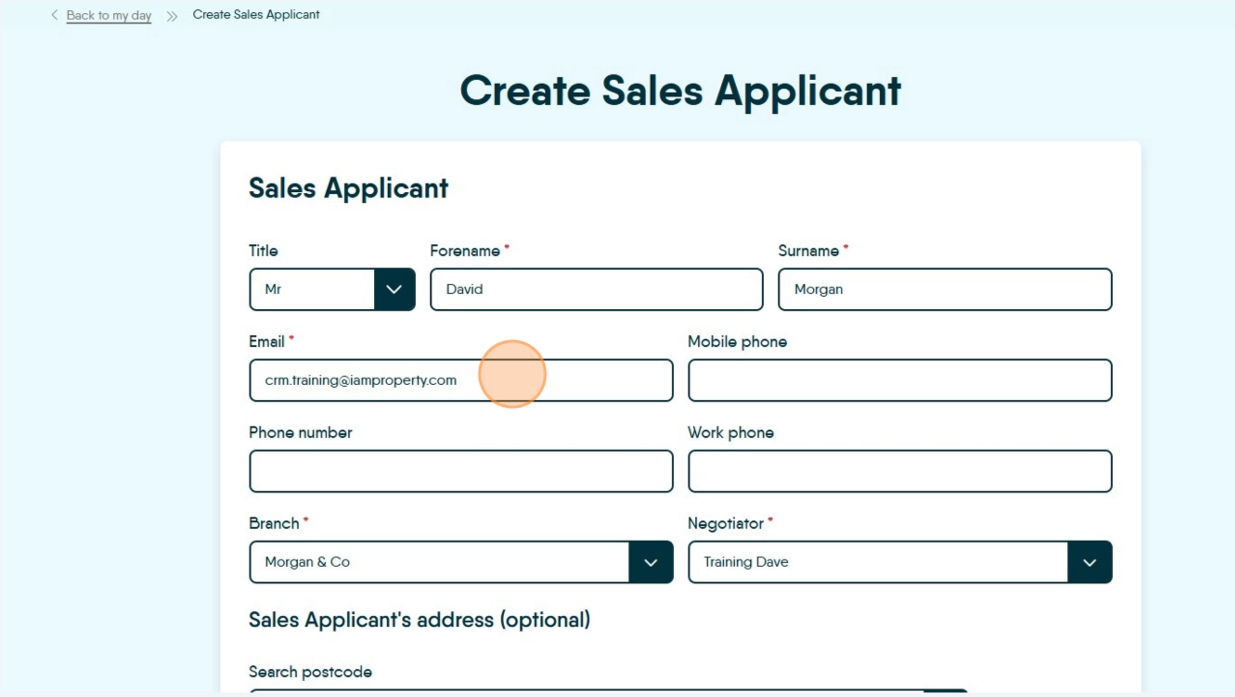
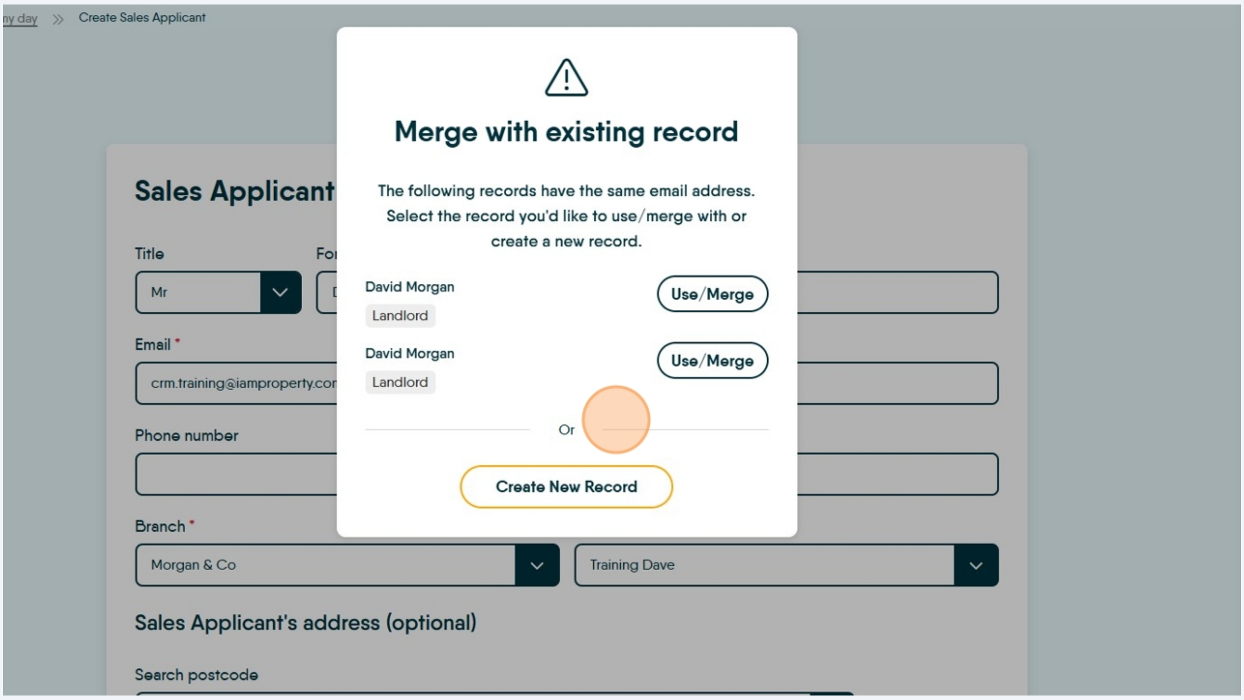
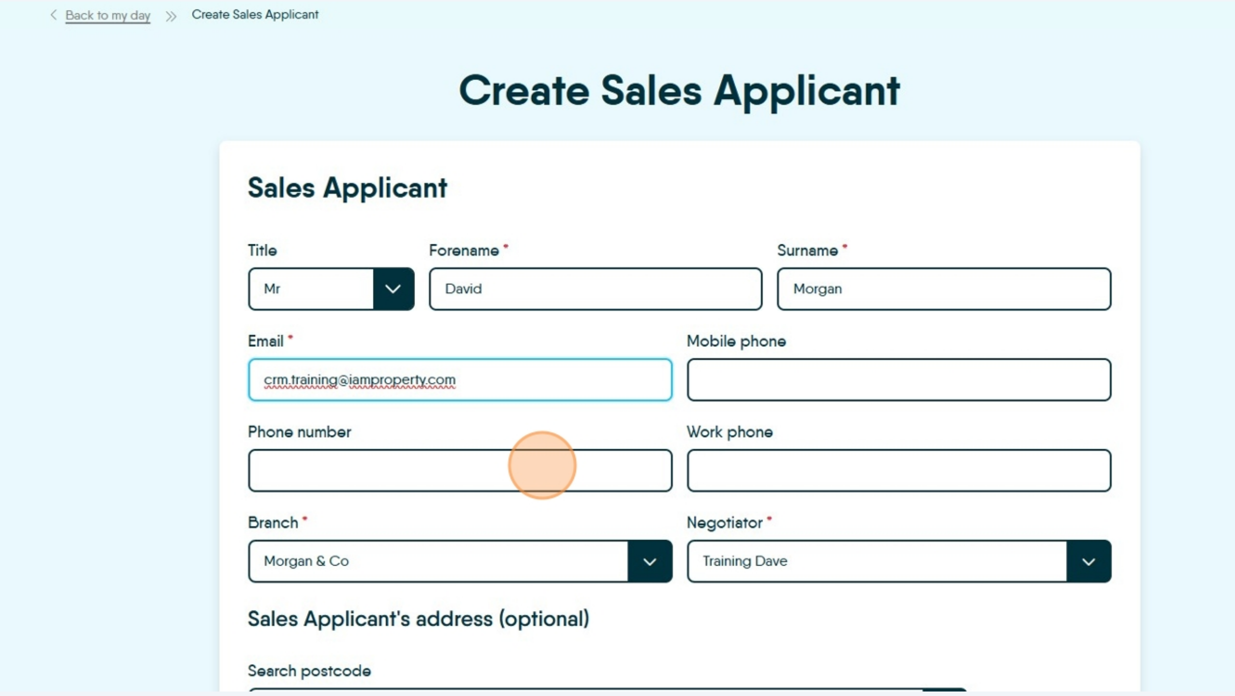
Click here and add the email address.
If the email address has been used previously in CRM you will see this screen showing the original records and giving you the option to merge or use the data from the other record to save you duplicating work.





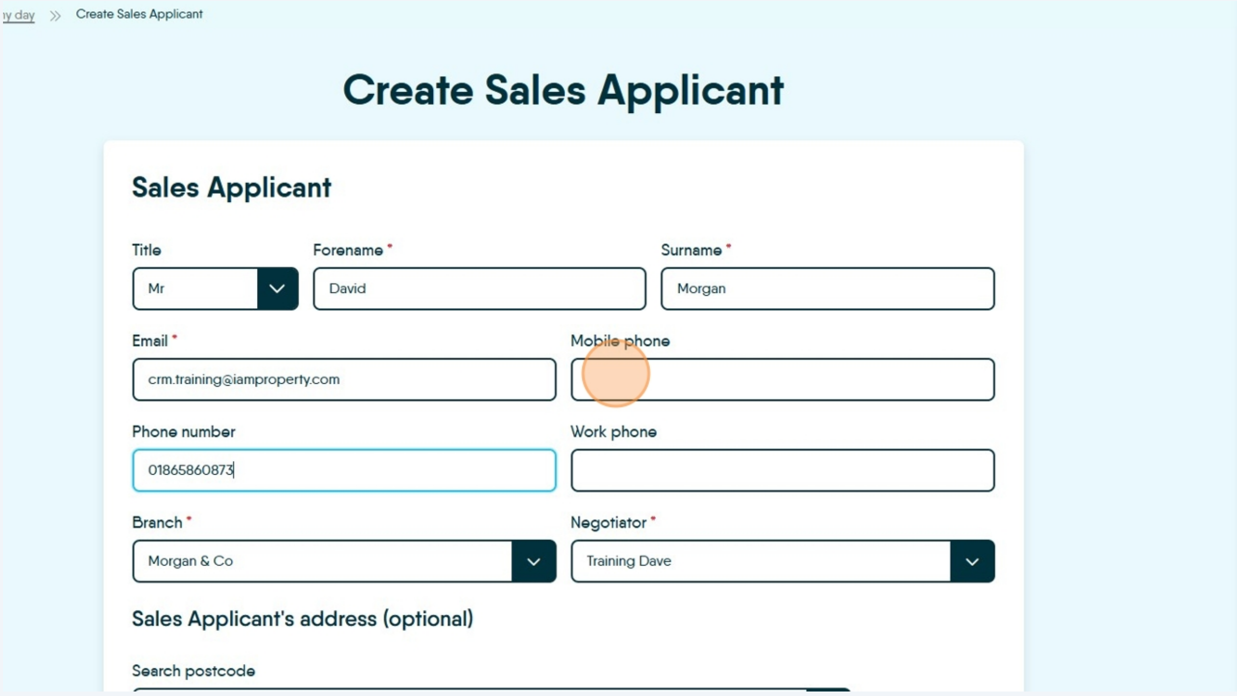
9 Click this text field and add the Applicant contact number.

If this is a mobile phone number then also add the number to the Mobile Phone field. This enables the the CRM to understand how to both show a contact number and send SMS messages to the Applicant.

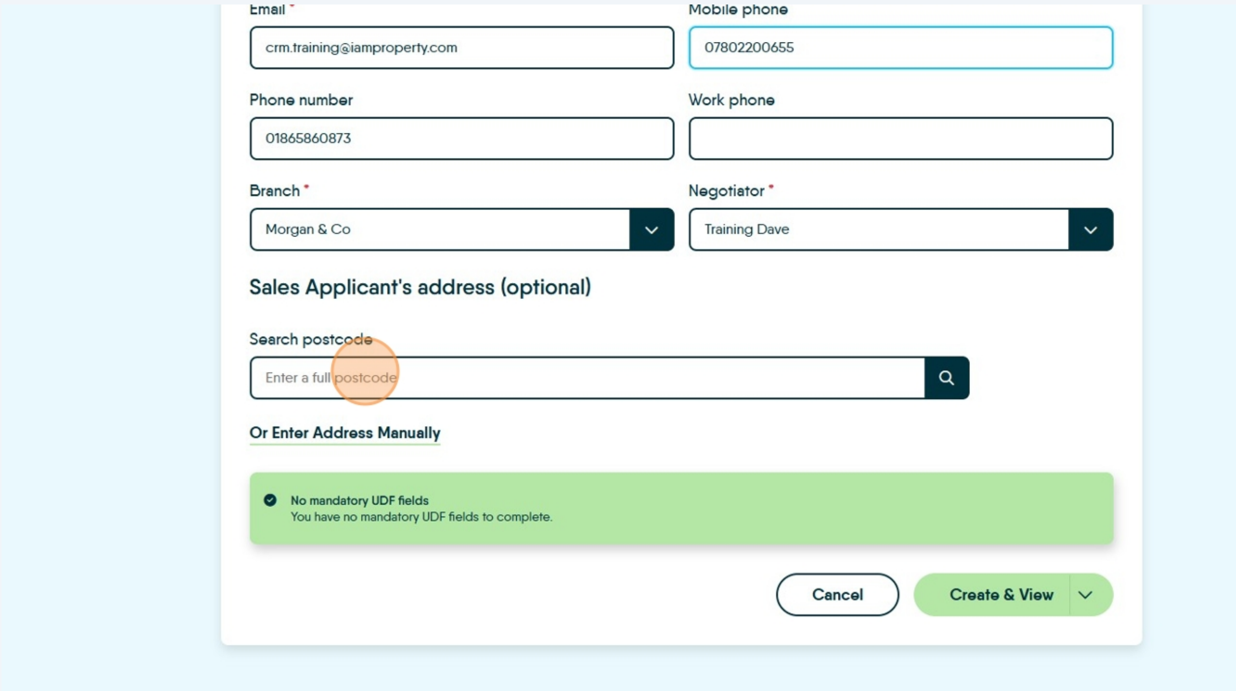


10 Click this text field and add the Mobile Phone Number.

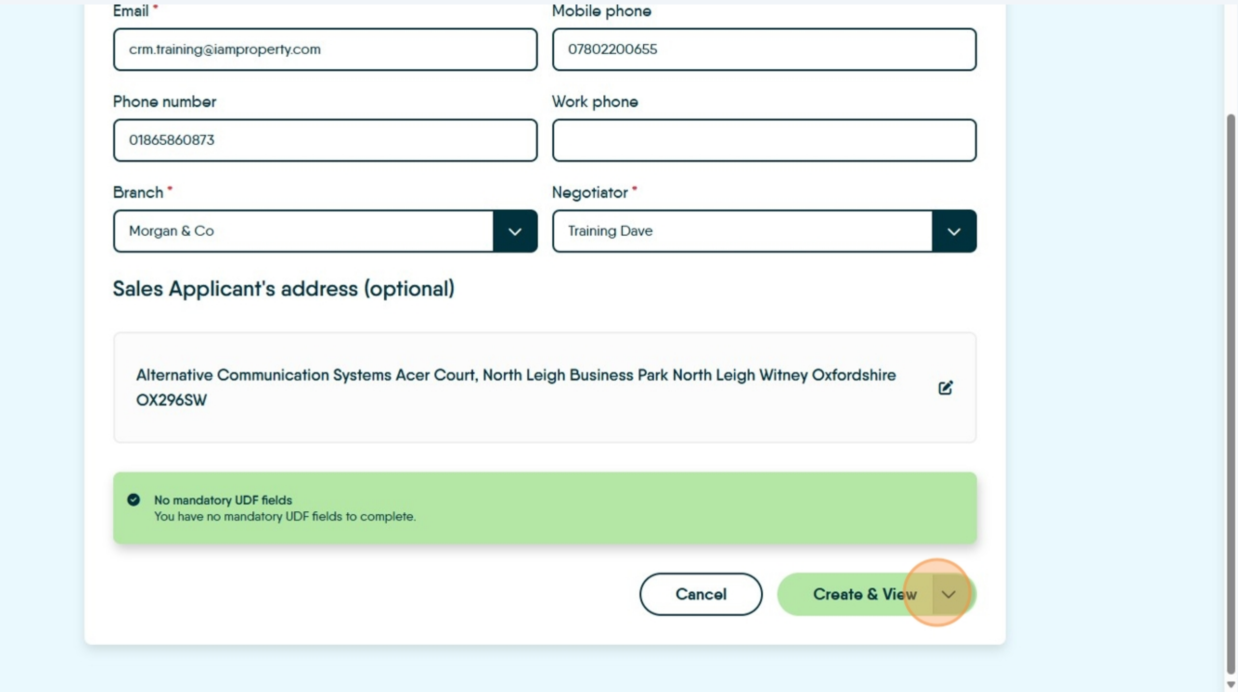
If the Mobile Number and primary contact number are the same, remember to add this to both Mobile and Phone number fields.

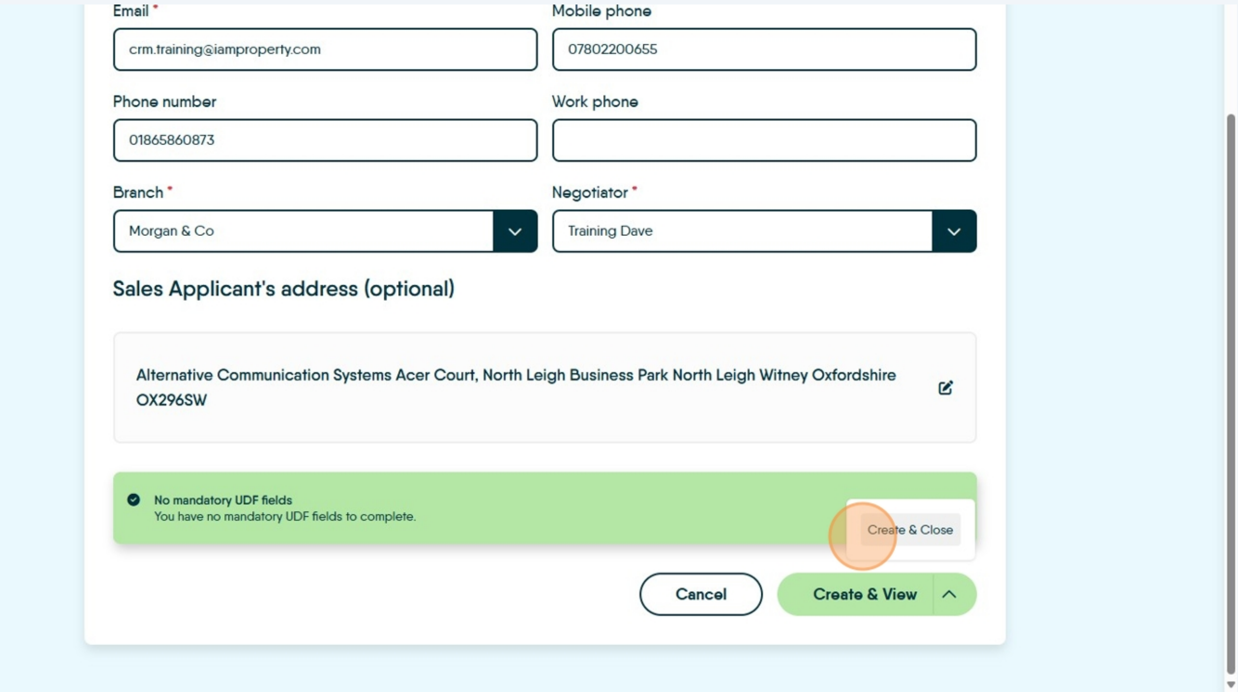


11 Click the "Search postcode" field. Add Applicant postcode here, or click on the 'Enter Address Manually' option and type the address.



12 Click here and either select the "Create and View" option or Click "Create & close"





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 Applicant record, for example you may have a Checklist enabled or UDF that need completion.