

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>

The screenshot shows the CRM MyDay dashboard. At the top, there is a navigation menu with options: My day, Lettings, Sales, Accounts, Reporting, and Communications. A user account button labeled 'My account' is in the top right. Below the navigation is a large heading 'Welcome back, Training'. Underneath are three buttons: '+ Add New Record', 'View Property Management', and 'Visit Help Centre'. A search bar is present with the text 'Search all records'. The main content area is divided into two panels: 'Today's events' and 'My tasks'. The 'Today's events' panel shows a table with one event at 12:00 named 'Test test'. The 'My tasks' panel shows a table with four tasks, all with a status of 'Not Started'.

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
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 a red circle. The dashboard includes a navigation menu, a search bar, and a 'My account' button. The main content area displays 'Welcome back, Training' and a 'Add New Record' button. Below this, there are sections for 'My events' and 'My tasks'.

iamproperty CRM movebutler iamsold

erty My day Lettings Sales Accounts Reporting Communications

My account

Welcome back, Training

Add New Record View Property Management Visit Help Centre

Records

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 Click "Add new record"

The screenshot shows the CRM dashboard with the 'Add new record' button highlighted in a red circle. The dashboard includes a navigation menu, a search bar, and a 'My account' button. The main content area displays 'Welcome back, Training' and a 'Add New Record' button. Below this, there are sections for 'My events' and 'My tasks'.

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erty My day Lettings Sales Accounts Reporting Communications

My account

Welcome back, Training

Add New Record View Property Management Visit Help Centre

Records

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 Click "Add New Record"

The screenshot shows the ian property CRM dashboard. At the top right, there are links for 'iamproperty', 'CRM', and 'movebutler'. The main navigation bar includes 'My day', 'Lettings', 'Sales', 'Accounts', 'Reporting', and 'Communications'. A search bar and a user profile icon labeled 'My acc' are also present. The main heading reads '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 for records is located below the buttons. The dashboard is divided into two main sections: 'Today's events' and 'My tasks'. 'Today's events' has a table with columns 'Time' and 'Name', showing a single event at 12:00 named 'Test test'. 'My tasks' has a table with columns 'Status', 'Name', 'Priority', 'Start date', and 'Due date', listing three tasks: 'Call Landlord' (High priority, 15/Nov/2024), 'test' (High priority, 27/Nov/2024), and 'Call Landlord' (Medium priority, 12/Dec/2024).

5 Click "Sales Applicant"

The screenshot shows the 'Add New Record' modal form overlaid on the dashboard. The modal is titled 'Add New Record' and is divided into two sections: 'Select appointment type' and 'Select record type'. In the 'Select appointment type' section, there are four options: 'Sales Appraisal', 'Lettings Appraisal', 'Sales Viewing (coming soon)', and 'Lettings Viewing (coming soon)'. In the 'Select record type' section, there are three options: 'Sales Applicant' (highlighted with an orange circle), 'Lettings Applicant', and 'Sales Property'. The background dashboard is dimmed, showing the 'Welcome back' heading and the 'Add New Record' button.

6 Select the "Mr" option.

The screenshot shows the 'Create Sales Applicant' form in a web application. The navigation bar at the top includes 'My day', 'Lettings', 'Sales', 'Accounts', 'Reporting', and 'Communications'. The breadcrumb trail shows '< Back to my day >> Create Sales Applicant'. The main heading is 'Create Sales Applicant'. The form is titled 'Sales Applicant' and contains several fields: 'Title' (a dropdown menu with 'Mr' selected and highlighted by an orange circle), 'Forename' (a text input field), 'Surname' (a text input field), 'Email' (a text input field), 'Mobile phone' (a text input field), 'Phone number' (a text input field), 'Work phone' (a text input field), 'Branch' (a dropdown menu with 'Morgan & Co' selected), and 'Negotiator' (a dropdown menu with 'Training Dave' selected). Below the form is the text 'Sales Applicant's address (optional)'.

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

The screenshot shows the same 'Create Sales Applicant' form. In this step, the 'Forename' text input field is highlighted with an orange circle. The 'Title' dropdown menu is now closed and shows 'Mr'. The 'Surname' field is empty. The 'Email', 'Mobile phone', 'Phone number', 'Work phone', 'Branch', and 'Negotiator' fields remain the same as in the previous step. The text 'Sales Applicant's address (optional)' is still present at the bottom of the form.

8

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.

< Back to my day >> Create Sales Applicant

Create Sales Applicant

Sales Applicant

Title Forename* Surname*

Email* Mobile phone

Phone number Work phone

Branch* Negotiator*

Sales Applicant's address (optional)

Search postcode

ny day >> Create Sales Applicant



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	<input type="button" value="Use/Merge"/>
David Morgan Landlord	<input type="button" value="Use/Merge"/>

Or

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.

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

Create Sales Applicant

Sales Applicant

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

Sales Applicant's address (optional)

Search postcode

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.

my day >> Create Sales Applicant

Create Sales Applicant

Sales Applicant

Title Forename* Surname*

Email* Mobile phone

Phone number Work phone

Branch* Negotiator*

Sales Applicant's address (optional)

Search postcode

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

Email* Mobile phone

Phone number Work phone

Branch* Negotiator*

Sales Applicant's address (optional)

Search postcode

Or Enter Address Manually

No mandatory UDF fields
You have no mandatory UDF fields to complete.

12

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

Email * Mobile phone

Phone number Work phone

Branch * Negotiator *

Sales Applicant's address (optional)

Alternative Communication Systems Acer Court, North Leigh Business Park North Leigh Witney Oxfordshire OX296SW

No mandatory UDF fields
You have no mandatory UDF fields to complete.

Email * Mobile phone

Phone number Work phone

Branch * Negotiator *

Sales Applicant's address (optional)

Alternative Communication Systems Acer Court, North Leigh Business Park North Leigh Witney Oxfordshire OX296SW

No mandatory UDF fields
You have no mandatory UDF fields to complete.



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.