

Core Process Simplification - Adding a New Vendor in CRM



Using the NEW Core Process Simplification screens.

This guide provides a straightforward, step-by-step approach to adding a new Vendor 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>

iam property

My dayLettingsSalesAccountsReportingCommunications

My account

Welcome back, Training

+ Add New Record

View Property Management

Visit Help Centre

Search all records

Today's events

Time	Name
12:00	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
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 '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 for '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'.

Search all records

Today's events

Time	Name
12:00	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

5 Click "Vendor"

The screenshot shows the 'Add New Record' modal in the ian property CRM. The modal has a title 'Add New Record' and a search bar. Below the search bar, there is a section 'Select record type' with a grid of buttons. The buttons are: 'Sales Applicant', 'Lettings Applicant', 'Sales Property', 'Lettings Property', 'Landlord', 'Portfolio', 'Vendor' (highlighted with an orange circle), 'Tenancy', 'Contractor', and 'Maintenance job'. The background shows the 'My Day' screen with the 'Add New Record' button highlighted.

Add New Record

Select record type

Sales Applicant	Lettings Applicant	Sales Property
Lettings Property	Landlord	Portfolio
Vendor	Tenancy	Contractor
Maintenance job		

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Select the "Title" "Forename" and " Surname " options.
Add the email address in the "Email" field.

If the email address has been used previously in CRM you will see a 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

The screenshot shows the 'Create Vendor' form in a web application. The form is titled 'Create Vendor' and has a navigation bar at the top with links like 'My day', 'Lettings', 'Sales', 'Accounts', 'Reporting', and 'Communications'. Below the navigation bar, there is a breadcrumb trail: '< Back to my day >> Create Vendor'. The form itself is titled 'Vendor' and contains several fields: 'Title' (a dropdown menu with 'Mr' selected), '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). The 'Title' field is highlighted with an orange circle.

The screenshot shows the 'Create Vendor' form in a web application, similar to the one above. The form is titled 'Create Vendor' and has a navigation bar at the top with links like 'My day', 'Lettings', 'Sales', 'Accounts', 'Reporting', and 'Communications'. Below the navigation bar, there is a breadcrumb trail: '< Back to my day >> Create Vendor'. The form itself is titled 'Vendor' and contains several fields: 'Title' (a dropdown menu with 'Mr' selected), '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). The 'Forename' field is highlighted with an orange circle.

Create Vendor

Vendor

Title	Forename *	Surname *
<div>Mr</div>	<div>David</div>	<div> </div>
Email *		Mobile phone
<div></div>		<div></div>
Phone number		Work phone
<div></div>		<div></div>
Branch *		Negotiator *
<div>Morgan & Co</div>		<div>Training Dave</div>

Vendor's address (optional)

Create Vendor

Vendor

Title	Forename *	Surname *
<div>Mr</div>	<div>David</div>	<div>Morgan</div>
Email *		Mobile phone
<div></div>		<div></div>
Phone number		Work phone
<div></div>		<div></div>
Branch *		Negotiator *
<div>Morgan & Co</div>		<div>Training Dave</div>

Vendor's address (optional)

Address type

My day Lettings Sales My account

day >> Create 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 Landlord	Use/Merge
David Morgan Lettings Applicant	Use/Merge
David Morgan Sales Applicant	Use/Merge

Or

Create New Record

Vendor

Title Forename Surname

Email *

Phone number

Branch *

Vendor's address (optional)

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Add in the Mobile Phone, Phone Number and if required Work Phone numbers for the Vendor.

If the main contact number is a Mobile Number copy this number into the Phone Number field. This allows phone calls to be logged and SMS to be sent correctly from CRM.

day >> Create Vendor

Create Vendor

Vendor

Title Forename * Surname *

Email * Mobile phone

Phone number Work phone

Branch * Negotiator *

Vendor's address (optional)

Address type

Create Vendor

Vendor

Title	Forename *	Surname *
Mr ▼	David	Morgan
Email *		Mobile phone
crm.training@iamproperty.com		07802200655
Phone number		Work phone
01865860873		
Branch *		Negotiator *
Morgan & Co ▼		Training Dave ▼

Vendor's address (optional)

Address type

8 Select the "Address Type" option from the drop down menu.

crm.training@iamproperty.com	07802200655
Phone number	Work phone
01865860873	
Branch *	Negotiator *
Morgan & Co ▼	Training Dave ▼

Vendor's address (optional)

Address type

Contact ▼

Search postcode

Enter a full postcode 🔍

Or Enter Address Manually

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

Cancel
Create & View ▼

9 Click the "Search postcode" field. Select the address from the drop down menu, or manually add the address using the option on screen.

crm.training@iamproperty.com

07802200655

Phone number

01865860873

Work phone

Branch *

Morgan & Co

Negotiator *

Training Dave

Vendor's address (optional)

Address type

Contact

Search postcode

Enter a full postcode

Or Enter Address Manually

No mandatory UDF fields

You have no mandatory UDF fields to complete.

Cancel

Create & View

crm.training@iamproperty.com

07802200655

Phone number

01865860873

Work phone

Branch *

Morgan & Co

Negotiator *

Training Dave

Vendor's address (optional)

Address type

Contact

74 Pelaw Crescent Chester le Street County Durham DH22HX

No mandatory UDF fields

You have no mandatory UDF fields to complete.

Cancel

Create & View

10 Click here to "Create and Close" or "Create and View" the record.

crm.training@iamproperty.com 07802200655

Phone number 01865860873 Work phone

Branch * Morgan & Co Negotiator * Training Dave

Vendor's address (optional)

Address type Contact

74 Pelaw Crescent Chester le Street County Durham DH22HX

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

Create & Close

Cancel Create & View



Tip! If there is a second (or more) Vendor then it is good practice to add the second 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.



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.