

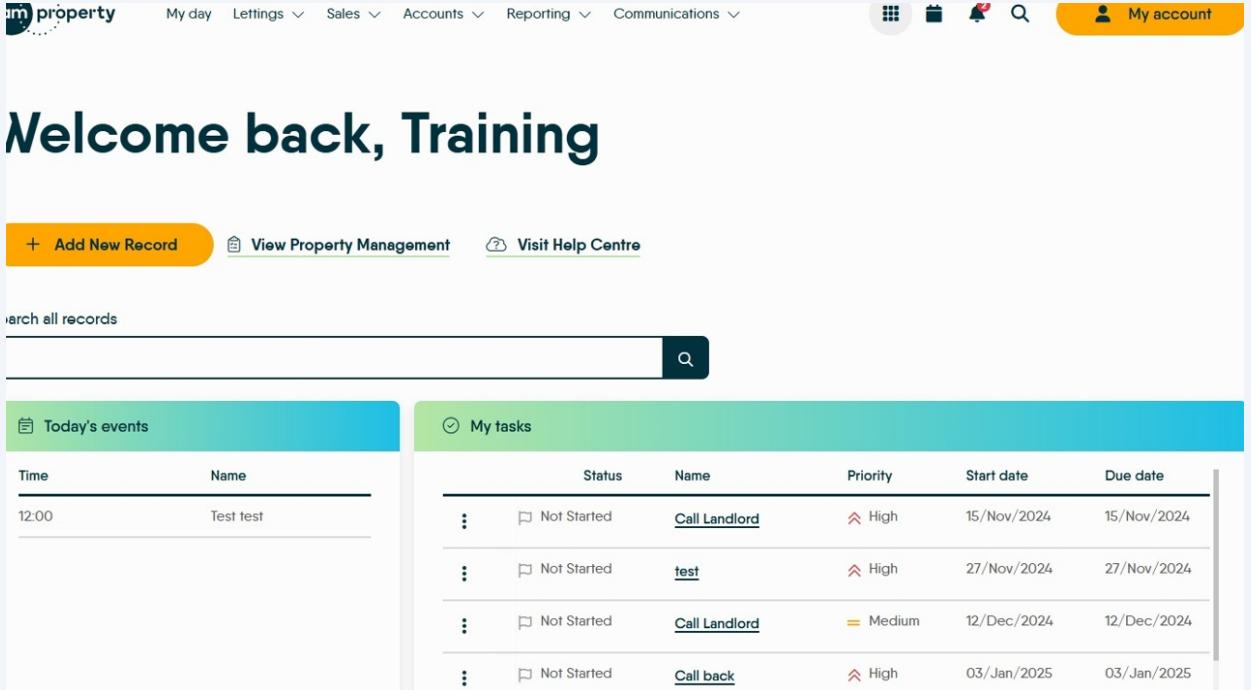
# Core Process Simplification - Adding a New Vendor in CRM



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.

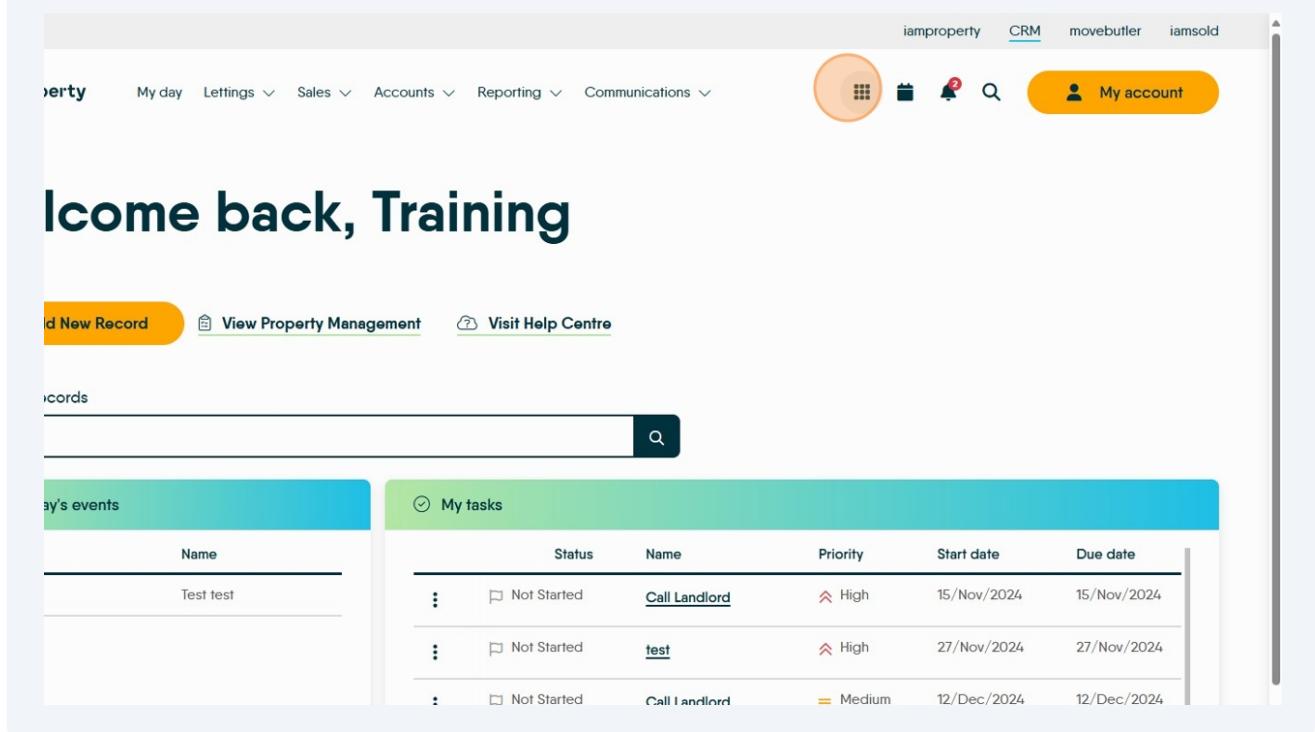
- 1 Navigate to <https://crm.iamproperty.com/MyDay>



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 showing a single event at 12:00 with the name 'Test test'. On the right, there is a 'My tasks' section showing four tasks:

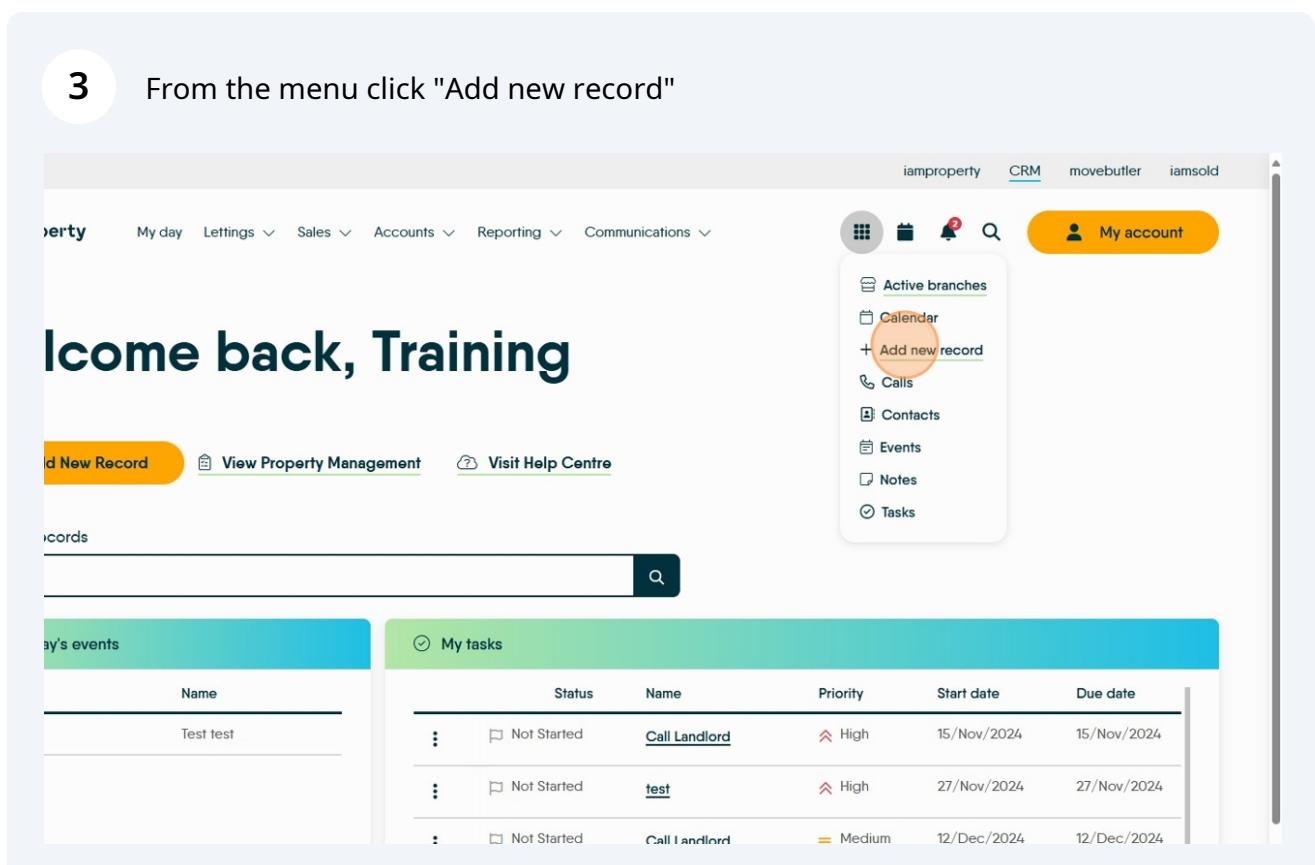
	Status	Name	Priority	Start date	Due date
⋮	Not Started	<a href="#">Call Landlord</a>	High	15/Nov/2024	15/Nov/2024
⋮	Not Started	<a href="#">test</a>	High	27/Nov/2024	27/Nov/2024
⋮	Not Started	<a href="#">Call Landlord</a>	Medium	12/Dec/2024	12/Dec/2024
⋮	Not Started	<a href="#">Call back</a>	High	03/Jan/2025	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

My day Lettings Sales Accounts Reporting Communications

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	<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 "Vendor"

Select record type

Sales Applicant	Lettings Applicant	Sales Property
Lettings Property	Landlord	Portfolio
<b>Vendor</b>	Tenancy	Contractor
Maintenance job		

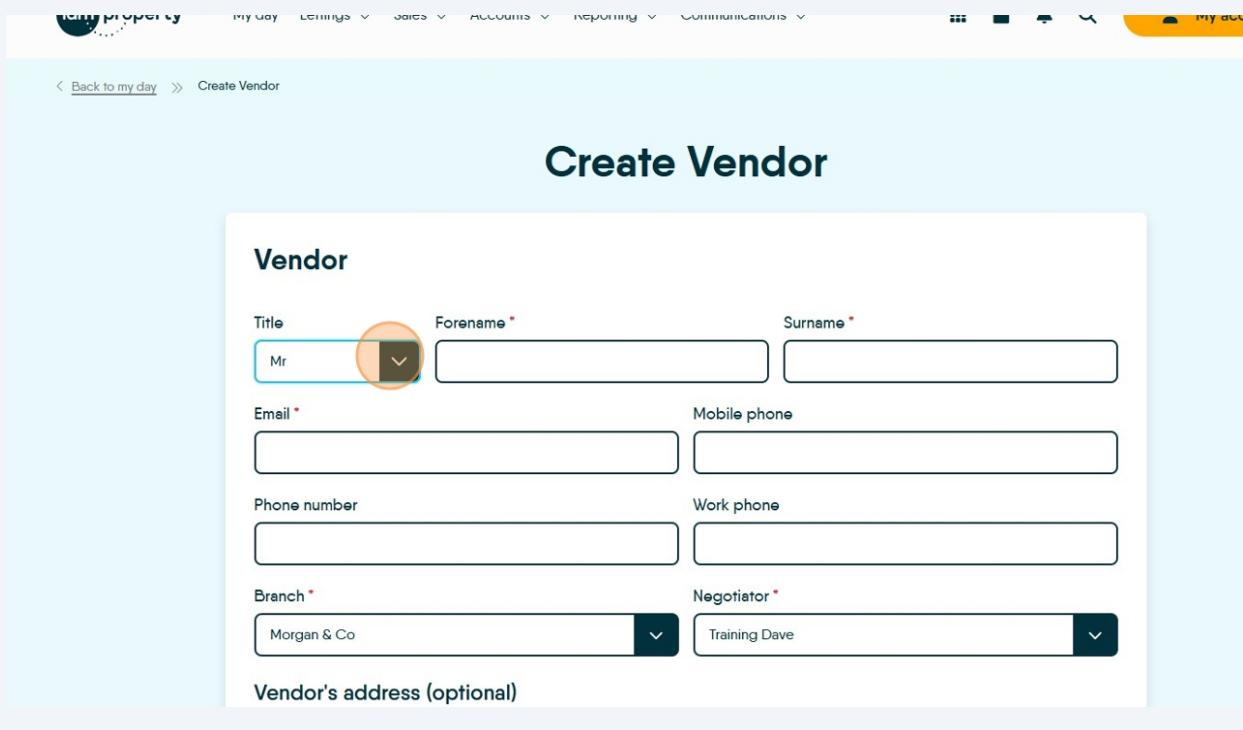
Start date Due date

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 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



Back to my day >> Create Vendor

## Create Vendor

**Vendor**

Title: Mr

Forename:

Surname:

Email:

Mobile phone:

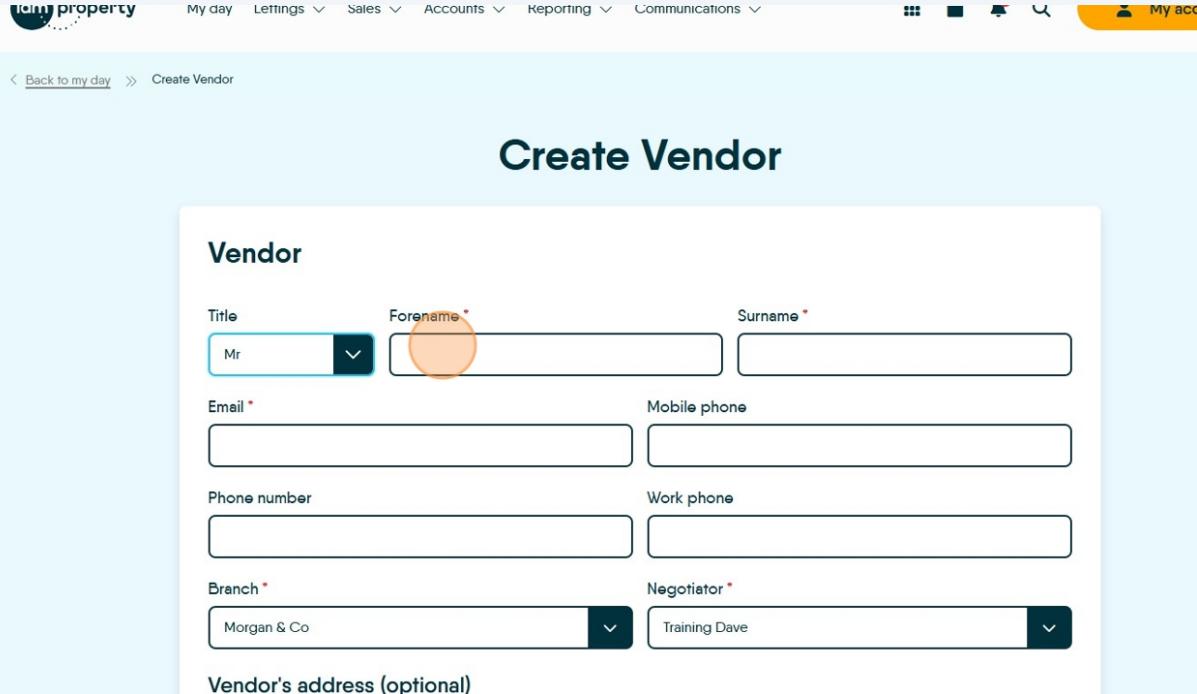
Phone number:

Work phone:

Branch: Morgan & Co

Negotiator: Training Dave

Vendor's address (optional):



Back to my day >> Create Vendor

## Create Vendor

**Vendor**

Title: Mr

Forename:

Surname:

Email:

Mobile phone:

Phone number:

Work phone:

Branch: Morgan & Co

Negotiator: Training Dave

Vendor's address (optional):

## Create Vendor

### Vendor

Title	Forename *	Surname *
Mr	David	I
Email *	Mobile phone	
Phone number	Work phone	
Branch *	Negotiator *	
Morgan & Co	Training Dave	

Vendor's address (optional)

< Back to my day >> Create Vendor

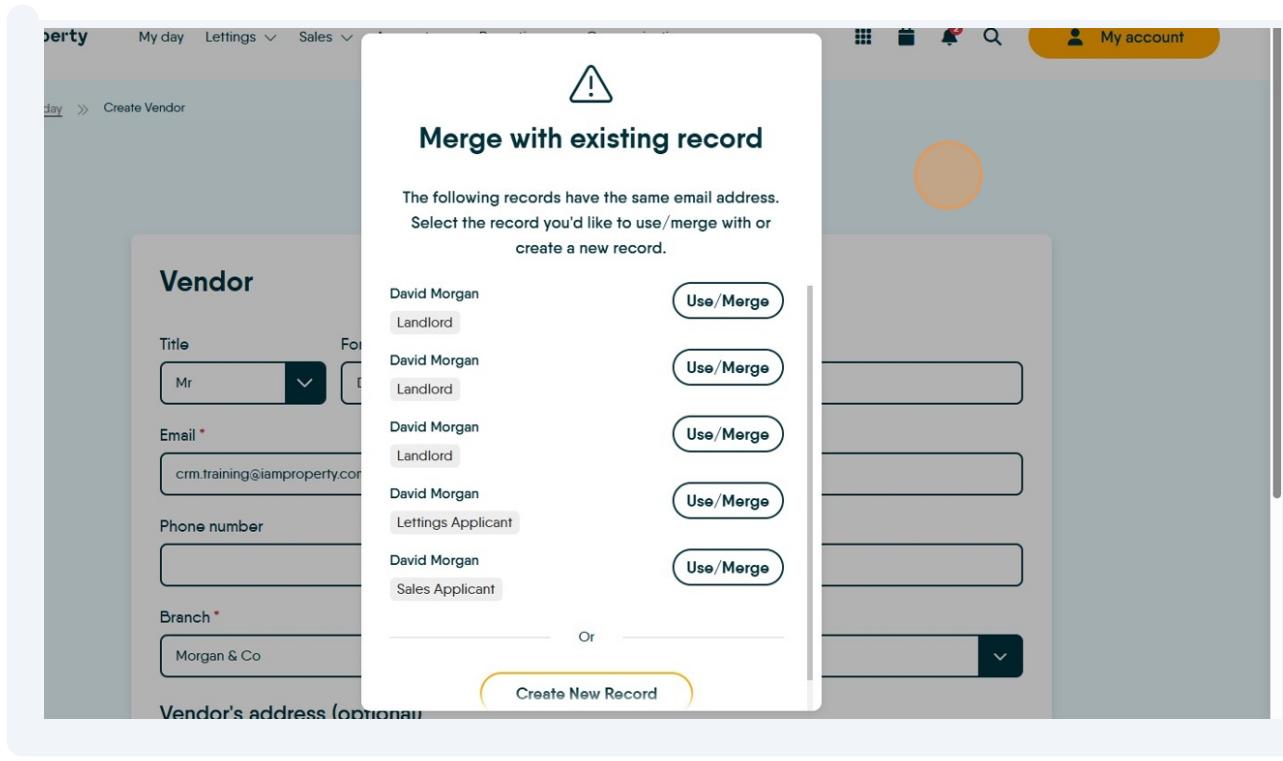
## Create Vendor

### Vendor

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

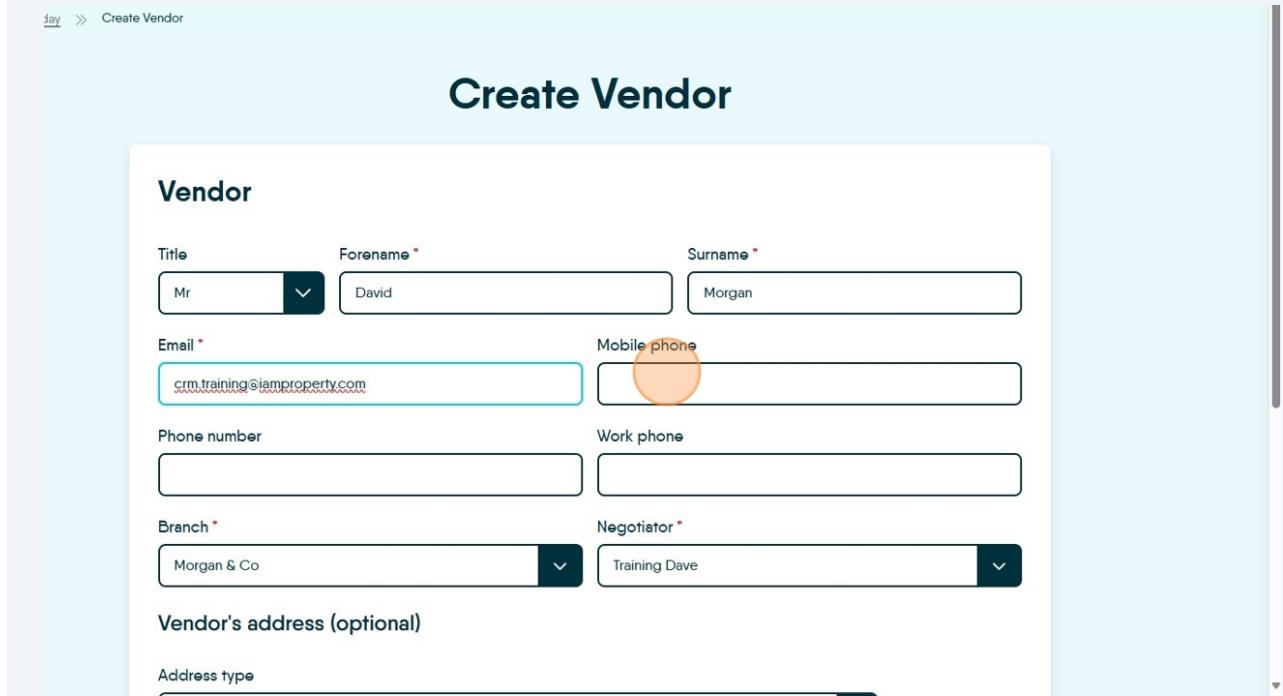
Vendor's address (optional)

Address type



7 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.



## 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	
<input checked="" type="checkbox"/> No mandatory UDF fields You have no mandatory UDF fields to complete.	
<a href="#">Cancel</a> <a href="#">Create &amp; View</a>	

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

Phone number

Work phone

Branch \*

Negotiator \*

**Vendor's address (optional)**

Address type

Search postcode

🔍

🔍

Or Enter Address Manually

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

Cancel
Create & View

Phone number

Work phone

Branch \*

Negotiator \*

**Vendor's address (optional)**

Address type

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 Work phone

01865860873

Branch \* Negotiator \*

Morgan & Co 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

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.