

Core Process Simplification - Adding a New Lettings Applicant in CRM



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

1

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

The screenshot shows the 'MyDay' dashboard in the CRM system. At the top, there's a navigation bar with the 'iam property' logo and menu items: 'My day', 'Lettings', 'Sales', 'Accounts', 'Reporting', and 'Communications'. On the right, there are icons for a grid, calendar, notifications, search, and a 'My account' button. Below the navigation bar, a large 'Welcome back, Training' message is displayed. Underneath, there are three action buttons: '+ Add New Record' (orange), 'View Property Management' (blue), and 'Visit Help Centre' (blue). A search bar labeled 'Search all records' is positioned below these buttons. The dashboard is divided into two main sections: 'Today's events' on the left and 'My tasks' on the right. The 'Today's events' section shows a table with one event at 12:00 named 'Test test'. The 'My tasks' section 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 interface with the 'Bento' button (a grid icon) highlighted in the top right corner. The interface includes a header with navigation links, a main content area with a 'Welcome back, Training' message, and a sidebar with various modules.

Header: iamproperty CRM movebutler iamsold

Navigation: My day Lettings Sales Accounts Reporting Communications

Buttons: My account

Welcome back, Training

Buttons: Add New Record View Property Management Visit Help Centre

Records

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 interface with the 'Add new record' button highlighted in the dropdown menu. The interface includes a header with navigation links, a main content area with a 'Welcome back, Training' message, and a sidebar with various modules.

Header: iamproperty CRM movebutler iamsold

Navigation: My day Lettings Sales Accounts Reporting Communications

Buttons: My account

Welcome back, Training

Buttons: Add New Record View Property Management Visit Help Centre

Records

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

Dropdown menu:

- Active branches
- Calendar
- Add new record
- Calls
- Contacts
- Events
- Notes
- Tasks

4 Click "Add New Record"

The screenshot shows the ian property CRM dashboard. The top navigation bar includes links for 'My day', 'Lettings', 'Sales', 'Accounts', 'Reporting', and 'Communications'. A search bar is on the right. The main heading is 'Welcome back, Training'. Below it, 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 below these 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', showing three tasks: 'Call Landlord' (High priority, 15/Nov/2024), 'test' (High priority, 27/Nov/2024), and 'Call Landlord' (Medium priority, 12/Dec/2024).

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My day Lettings Sales Accounts Reporting Communications

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

5 Click "Lettings Applicant"

The screenshot shows the ian property CRM dashboard with the 'Add New Record' modal open. The modal has a close button (X) in the top right corner. It is divided into two sections: 'Select appointment type' and 'Select record type'. 'Select appointment type' has three options: 'Sales Appraisal', 'Lettings Appraisal', and 'Sales Viewing (coming soon)'. 'Select record type' has three options: 'Sales Applicant', 'Lettings Applicant' (highlighted with an orange circle), and 'Sales Property'. The background dashboard is dimmed, showing the same 'Welcome back, Training' heading and navigation bar as in the previous screenshot.

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My day Lettings Sales Accounts Reporting Communications

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

Add New Record

Select appointment type

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

Select record type

- Sales Applicant
- Lettings Applicant
- Sales Property

6 Select the "Mr" option.

The screenshot shows the 'Create Lettings Applicant' form in a web application. The form is titled 'Lettings Applicant' and includes several input fields. The 'Title' dropdown menu is highlighted with an orange circle, showing the 'Mr' option selected. The 'Forename' and 'Surname' fields are empty. The 'Email' field is also empty. The 'Mobile phone' field is empty. The 'Phone number' field is empty. The 'Work phone' field is empty. The 'Branch' dropdown menu is set to 'Morgan & Co'. The 'Negotiator' dropdown menu is set to 'Training Dave'. The 'Lettings Applicant's address (optional)' field is empty.

7 Click this text field and add the Forename then Surname of the applicant

The screenshot shows the 'Create Lettings Applicant' form in a web application. The form is titled 'Lettings Applicant' and includes several input fields. The 'Forename' text field is highlighted with an orange circle. The 'Surname' field is empty. The 'Email' field is empty. The 'Mobile phone' field is empty. The 'Phone number' field is empty. The 'Work phone' field is empty. The 'Branch' dropdown menu is set to 'Morgan & Co'. The 'Negotiator' dropdown menu is set to 'Training Dave'. The 'Lettings Applicant's address (optional)' field is empty.

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.

Click "Create new record" if you want to manually create a new client record with the duplicate email address

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

Create Lettings Applicant

Lettings Applicant

Title	Forename *	Surname *
Mr	David	Morgan
Email *		Mobile phone
crm.training@iamproperty.com		
Phone number	Work phone	
Branch *	Negotiator *	
Morgan & Co	Training Dave	
Lettings Applicant's address (optional)		
Search postcode		

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

Lettings Applicant

Title	Forename *
Mr	
Email *	
crm.training@iamproperty.com	
Phone number	
Branch *	
Morgan & Co	
Lettings Applicant's address (optional)	
Search postcode	



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	Use/Merge
Landlord	
David Morgan	Use/Merge
Landlord	
David Morgan	Use/Merge
Sales Applicant	

Or

Create New Record



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 enables the the CRM to understand how to both show a contact number and send SMS messages to the Applicant.

9

Click the "Search postcode" field. Select the postcode from the list or click '...Enter Address Manually' to enter/edit the address

Mr David Morgan

Email * crm.training@iamproperty.com Mobile phone 07802200655

Phone number 01865860873 Work phone

Branch * Morgan & Co Negotiator * Training Dave

Lettings Applicant's address (optional)


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

10 Click here.

Mr  David Morgan



Email * Mobile phone

crm.training@iamproperty.com 07802200655

Phone number Work phone

01865860873

Branch * Negotiator *

Morgan & Co  Training Dave 

Lettings Applicant's address (optional)

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




Click here to edit the address found.

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

Cancel

Create & View 

11 Click "Create & close"

Mr  David Morgan



Email * Mobile phone

crm.training@iamproperty.com 07802200655

Phone number Work phone

01865860873

Branch * Negotiator *

Morgan & Co  Training Dave 

Lettings 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.

Create & Close

Cancel

Create & View 



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.