

# 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,

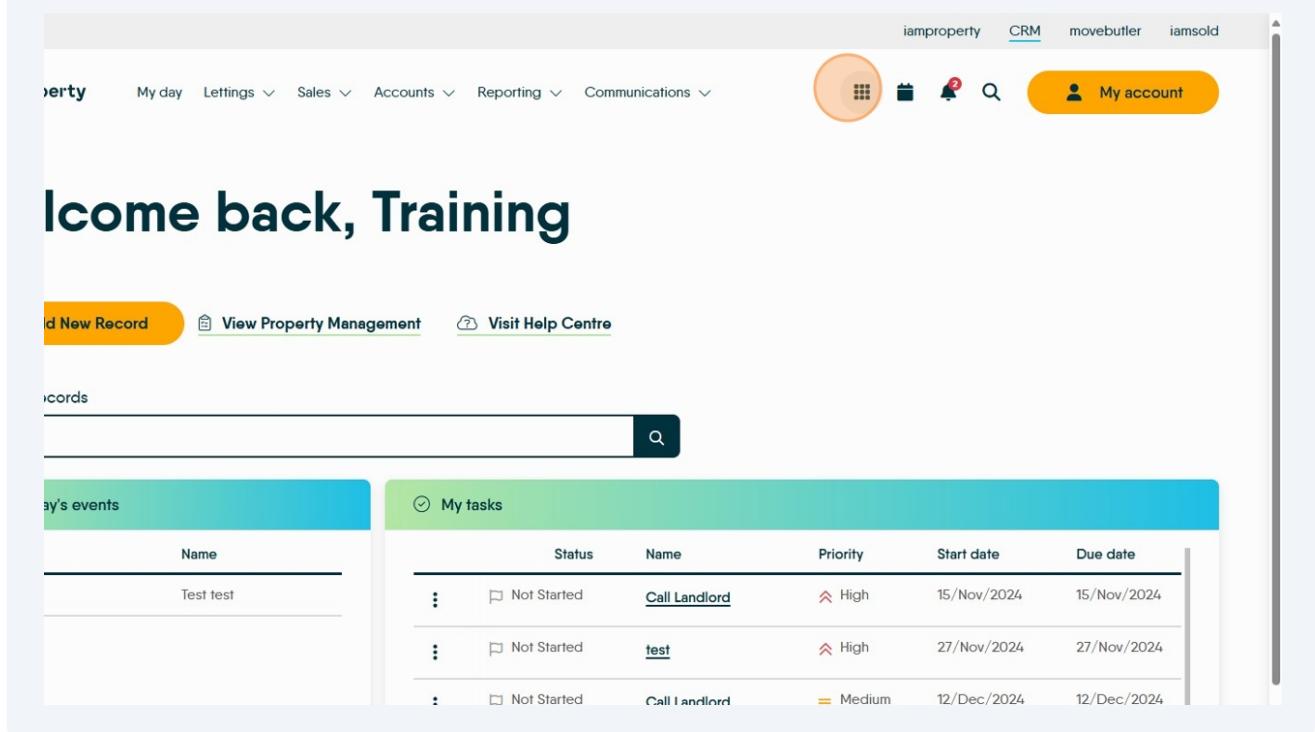
It simplifies what can be a complex task into manageable actions, ensuring users can efficiently navigate the CRM platform. By following these steps, users can save time, reduce errors, and enhance their productivity in managing lettings applicants.

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

The screenshot shows the 'My Day' dashboard of the iam property CRM. At the top, there is a navigation bar with links: My day, Lettings, Sales, Accounts, Reporting, Communications, and a yellow 'My account' button. Below the navigation bar, a large 'Welcome back, Training' message is displayed. Underneath this, there are two main cards: 'Today's events' and 'My tasks'. The 'Today's events' card shows a single event at 12:00: 'Test test'. The 'My tasks' card lists four tasks: 'Call Landlord' (High priority, due 15/Nov/2024), 'test' (High priority, due 27/Nov/2024), 'Call Landlord' (Medium priority, due 12/Dec/2024), and 'Call back' (High priority, due 03/Jan/2025). Each task has a status of 'Not Started' and a three-dot menu icon.

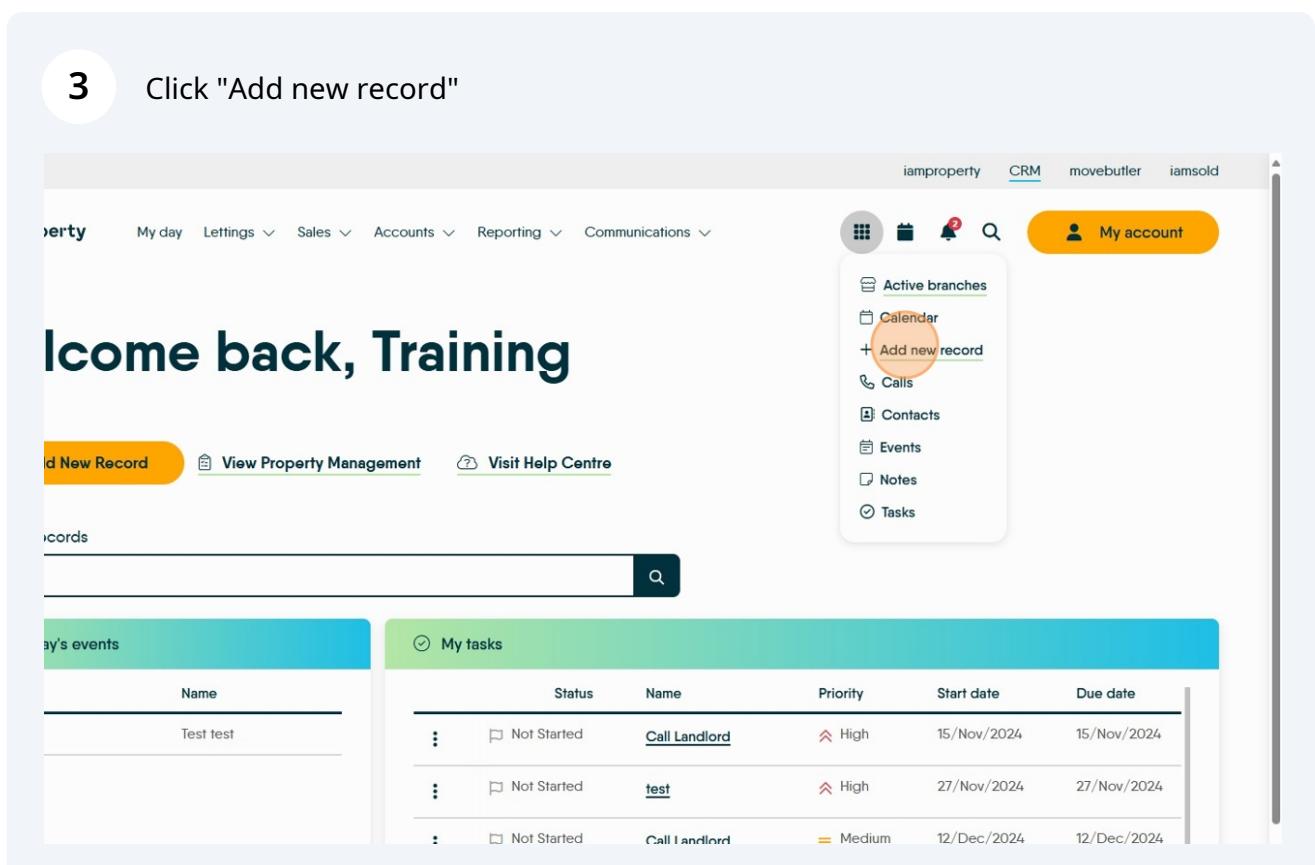
Time	Name	Status	Name	Priority	Start date	Due date
12:00	Test test	Not Started	Call Landlord	High	15/Nov/2024	15/Nov/2024
		Not Started	test	High	27/Nov/2024	27/Nov/2024
		Not Started	Call Landlord	Medium	12/Dec/2024	12/Dec/2024
		Not Started	Call back	High	03/Jan/2025	03/Jan/2025

2 Click "Bento" button



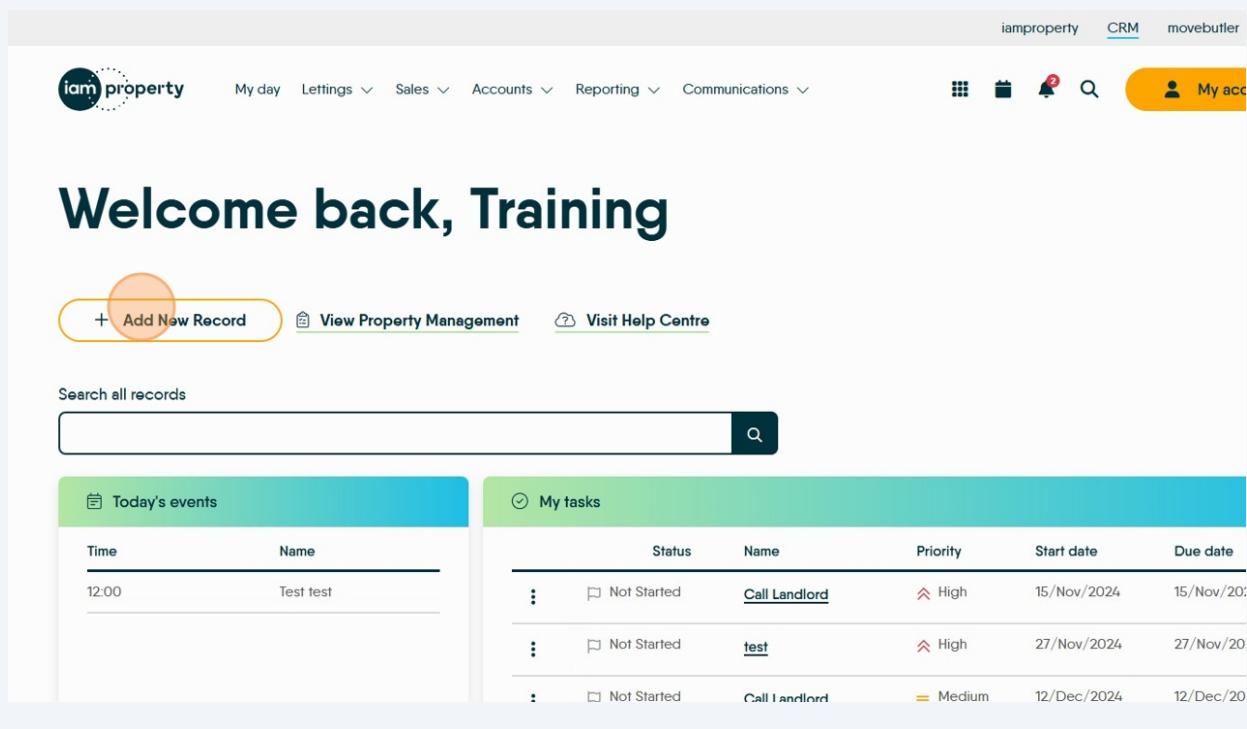
The screenshot shows the Bento software interface. At the top, there is a navigation bar with links: 'My day', 'Lettings', 'Sales', 'Accounts', 'Reporting', and 'Communications'. On the right side of the top bar are icons for 'iamproperty', 'CRM', 'movebutler', and 'iamsold'. Below the top bar, there is a search bar and a 'My account' button. The main content area features a large title 'Income back, Training'. Below the title are three buttons: 'Add New Record', 'View Property Management', and 'Visit Help Centre'. The main workspace is divided into two sections: 'My events' (which is empty) and 'My tasks'. The 'My tasks' section has a table with columns: Status, Name, Priority, Start date, and Due date. It contains three tasks: 'Call Landlord' (High priority, due 15/Nov/2024), 'test' (High priority, due 27/Nov/2024), and 'Call Landlord' (Medium priority, due 12/Dec/2024).

3 Click "Add new record"



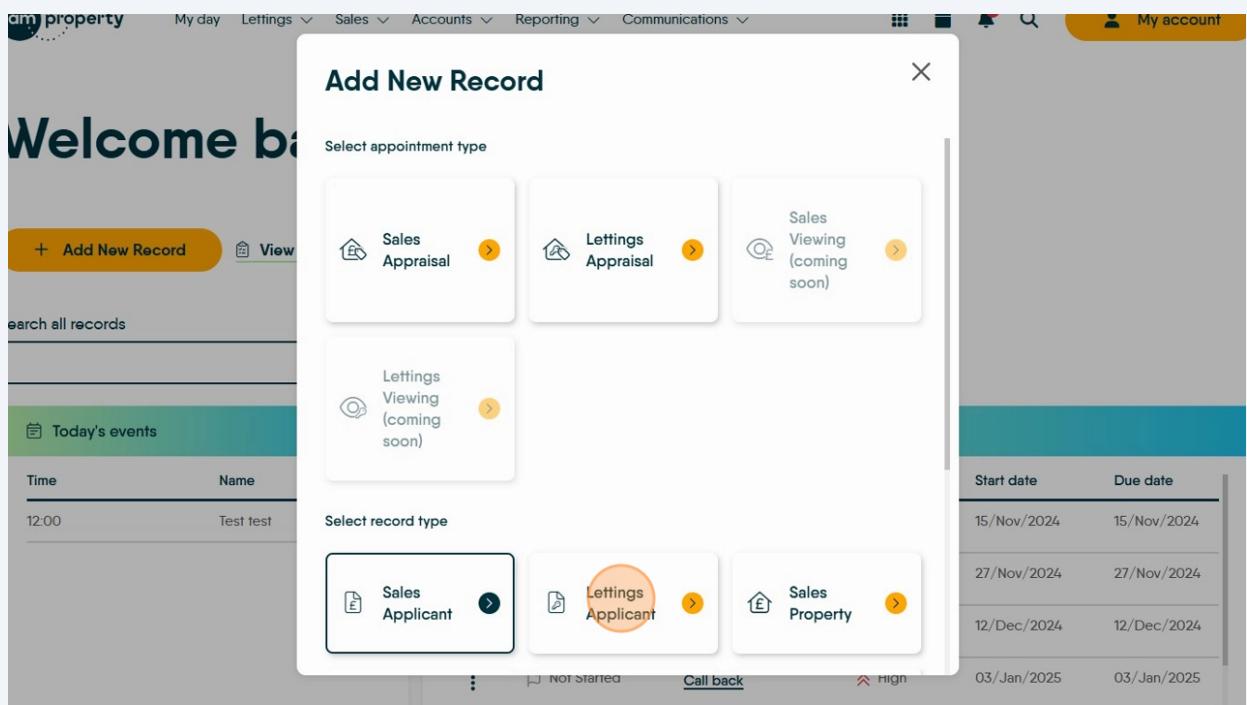
The screenshot shows the Bento software interface, similar to the previous one but with a different sidebar. The sidebar on the right is a navigation menu with the following items: 'Active branches', 'Calendar', 'Add new record' (which is highlighted with an orange circle), 'Calls', 'Contacts', 'Events', 'Notes', and 'Tasks'. The main content area is identical to the first screenshot, showing the 'Income back, Training' title, the 'Add New Record' button, and the 'My tasks' section with its table of three tasks.

4 Click "Add New Record"



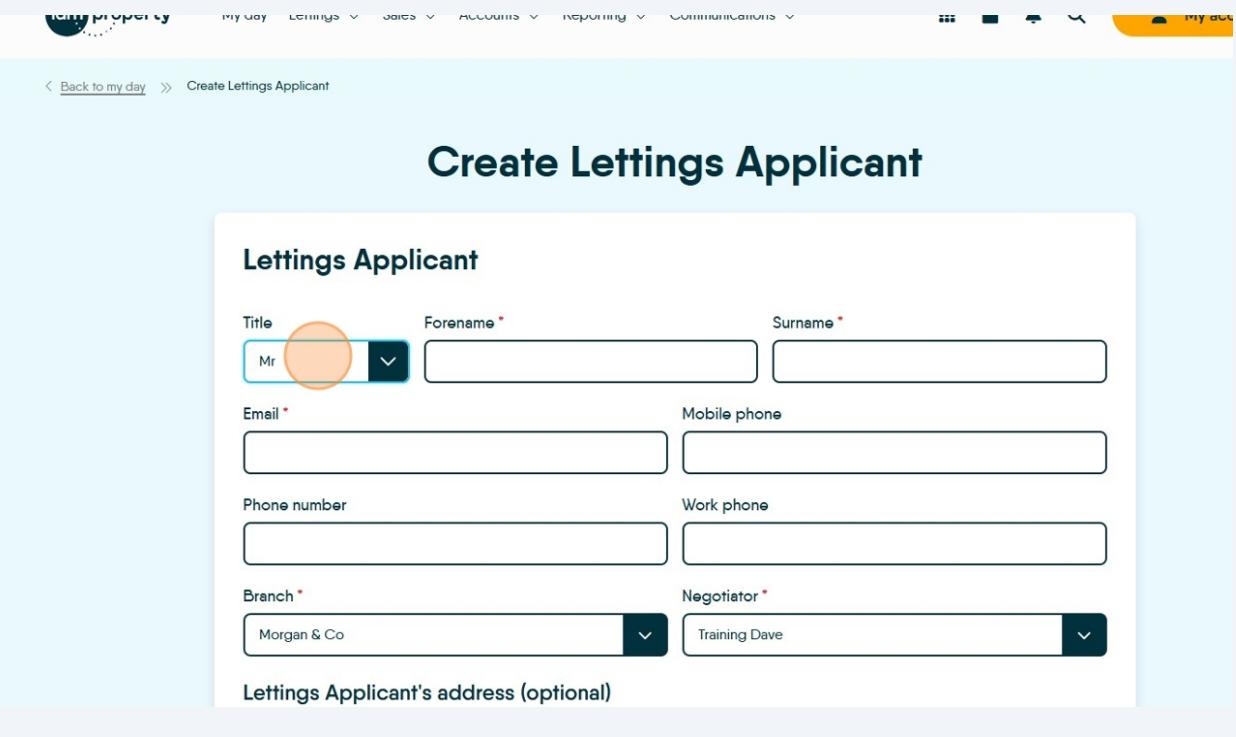
The screenshot shows the iamproperty CRM dashboard. At the top, there are navigation links: My day, Lettings, Sales, Accounts, Reporting, Communications, and a search bar. On the right, there are icons for CRM, movebutler, and a user account. The main heading is "Welcome back, Training". Below the heading are three buttons: "+ Add New Record" (highlighted with an orange circle), "View Property Management", and "Visit Help Centre". A search bar with a magnifying glass icon is present. The dashboard is divided into two sections: "Today's events" and "My tasks". The "Today's events" section shows a single event at 12:00 with the name "Test test". The "My tasks" section lists three tasks: "Call Landlord" (Status: Not Started, Priority: High, Start date: 15/Nov/2024, Due date: 15/Nov/2024), "test" (Status: Not Started, Priority: High, Start date: 27/Nov/2024, Due date: 27/Nov/2024), and "Call Landlord" (Status: Not Started, Priority: Medium, Start date: 12/Dec/2024, Due date: 12/Dec/2024).

5 Click "Lettings Applicant"



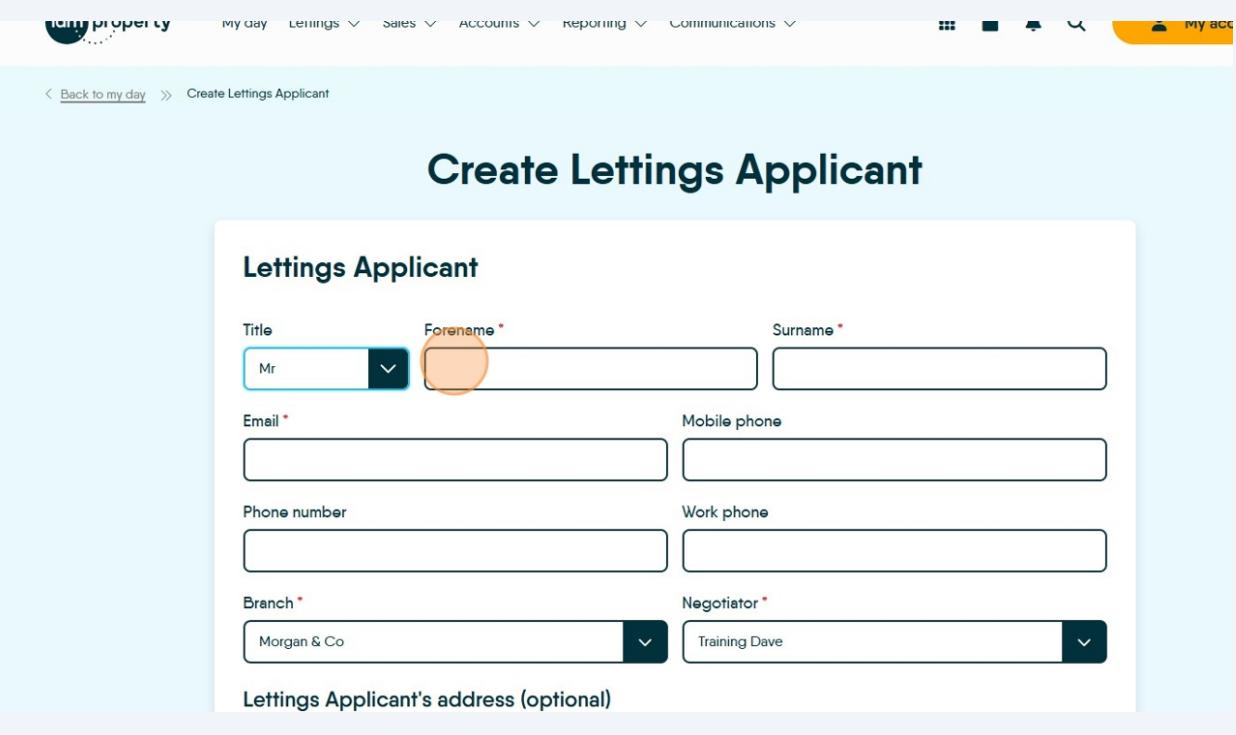
The screenshot shows the "Add New Record" modal. The title is "Add New Record" and the sub-section is "Select appointment type". It lists four options: "Sales Appraisal", "Lettings Appraisal", "Sales Viewing (coming soon)", and "Lettings Viewing (coming soon)". The "Lettings Appraisal" option is highlighted with an orange circle. Below this, the "Select record type" section shows three options: "Sales Applicant", "Lettings Applicant" (highlighted with an orange circle), and "Sales Property". The "Lettings Applicant" option is also highlighted with an orange circle. At the bottom of the modal, there are buttons for "Not Started", "Call back", and "High". The background of the modal shows the "Welcome back, Training" dashboard with the "Lettings Applicant" option highlighted.

6 Select the "Mr" option.



The screenshot shows the 'Create Lettings Applicant' form. The 'Title' field is highlighted with an orange circle, showing 'Mr' selected. The form includes fields for Forename, Surname, Email, Mobile phone, Phone number, Work phone, Branch, Negotiator, and Lettings Applicant's address (optional).

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



The screenshot shows the 'Create Lettings Applicant' form. The 'Forename' field is highlighted with an orange circle. The form includes fields for Title, Forename, Surname, Email, Mobile phone, Phone number, Work phone, Branch, Negotiator, and Lettings Applicant's address (optional).

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



### 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

Sales Applicant

Use/Merge

Or

Create New Record

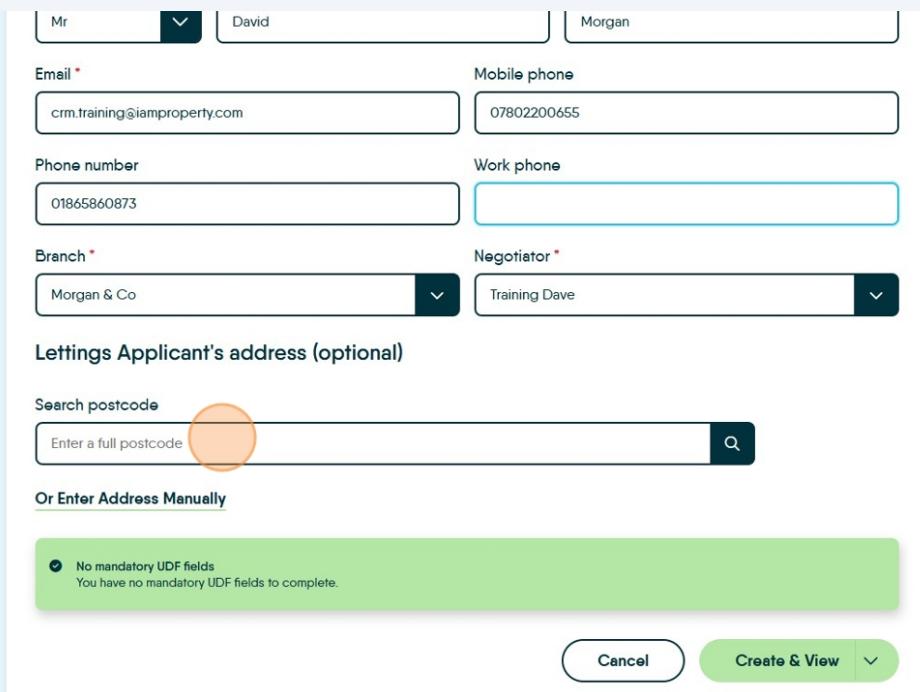


Tip! If the main contact number is a mobile phone number then add the number to both the Mobile Phone and the Phone Number fields.

This enables the 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



The screenshot shows a CRM application interface for entering applicant details. The fields filled in are:

- Gender: Mr
- First Name: David
- Last Name: Morgan
- Email: crm.training@iamproperty.com
- Mobile phone: 07802200655
- Phone number: 01865860873
- Work phone: (empty)
- Branch: Morgan & Co
- Negotiator: Training Dave

Below these fields, there is a section for "Lettings Applicant's address (optional)". It includes a "Search postcode" input field with the placeholder "Enter a full postcode" and a magnifying glass icon. The input field is highlighted with an orange circle. Below this is a link "Or Enter Address Manually". A green message box at the bottom left states: "No mandatory UDF fields. You have no mandatory UDF fields to complete." At the bottom right are "Cancel" and "Create & View" buttons.

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

Create & Close

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

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.