

Core Process Simplification - Adding a New Lettings Property in CRM



Using the NEW Core Process Simplification screens.

This guide provides a straightforward, step-by-step approach to adding a new Lettings Property 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, menu items (My day, Lettings, Sales, Accounts, Reporting, Communications), and user account information. Below the navigation bar, a large 'Welcome back, Training' message is displayed. Underneath, there are three main action buttons: '+ Add New Record' (orange), 'View Property Management' (green), 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 single event at 12:00 named 'Test test'. The 'My tasks' section displays a table of tasks with columns for Status, Name, Priority, Start date, and Due date.

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'.

5 Click "Lettings Property"

The screenshot shows the 'Add New Record' modal in the ian property CRM. The modal is titled 'Add New Record' and has a close button (X) in the top right corner. Below the title, there is a search bar and a section titled 'Select record type'. This section contains a grid of buttons with icons and labels: 'Sales Applicant', 'Lettings Applicant', 'Sales Property', 'Lettings Property' (highlighted with an orange circle), 'Landlord', 'Portfolio', 'Vendor', 'Tenancy', 'Contractor', and 'Maintenance job'. The background of the modal shows a blurred view of the 'My Day' screen, including the 'Today's events' and 'My tasks' sections.



Tip! This process creates both the Property and Landlord Records.

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Click the "Address *" field and type the postcode, select the address from the drop down menu or click 'Enter Address Manually' to add the address.

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

Create Lettings Property

Lettings Property

Address *

Or Enter Address Manually

Property type Property age Furnished type

Branch * Negotiator *

Bedrooms Bathrooms Receptions

1 Property

2 Landlord

7

Click the "Property type" "Property Age" and "Furnished Type" fields. Click this dropdown.

Create Lettings Property

Lettings Property

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

Property type

Q

Property age

▼

Furnished type

▼

Branch *

Morgan & Co

▼

Negotiator *

Training Dave

▼

Bedrooms

Bathrooms

Receptions

- 1 Property
- 2 Landlord

Create Lettings Property

Lettings Property

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

Property type

Q

Property age

▼

Furnished type

▼

Branch *

Morgan & Co

▼

Negotiator *

Training Dave

▼

Bedrooms

Bathrooms

Receptions

- 1 Property
- 2 Landlord

Create Lettings Property

Lettings Property

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

Property type

Property age

Furnished type

Branch * Negotiator *

Period
Pre-war
Post-war
Modern
New-build

Receptions

- 1 Property
- 2 Landlord

8 Add the numbers of Bedrooms, Bathrooms and Receptions

Create Lettings Property

Lettings Property

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

Property type

Property age

Furnished type

Branch * Negotiator *

Bedrooms Bathrooms

Furnished
Unfurnished
Part furnished

- 1 Property
- 2 Landlord

Create Lettings Property

Lettings Property

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



Property type

Property age

Furnished type

Branch *

Negotiator *

Bedrooms

Bathrooms

Receptions

1 Property

2 Landlord

Create Lettings Property

Lettings Property

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



Property type

Property age

Furnished type

Branch *

Negotiator *

Bedrooms

Bathrooms


Receptions




1 Property



2 Landlord

9 Then click "Continue"



Lettings Property

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

Property type: Barn Conversion  Property age: Period  Furnished type: Unfurnished 

Branch *: Morgan & Co  Negotiator *: Training Dave 

Bedrooms: 4 Bathrooms: 4 Receptions: 3


1 Property

2 Landlord

10 Next you'll be asked for Landlord details. Select the "Title" from the drop down menu.


Create Lettings Property

Lettings Property

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

Furnished: Unfurnished Property Type: Barn Conversion
Bedrooms: 4 Bathrooms: 4
Receptions: 3

Primary Landlord Use Existing Record

Title: Lord  Forename *: Surname *:

Email *: Mobile phone:

Phone number: Work phone:

1 Property

2 Landlord

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Click here and add the Forename, Surname and 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

Create Lettings Property

Lettings Property

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

Furnished: Unfurnished
Bedrooms: 4
Receptions: 3

Property Type: Barn Conversion
Bathrooms: 4

Primary Landlord

[Use Existing Record](#)

Title	Forename *	Surname *
Lord	David	Morgan
Email *		Mobile phone
Phone number	Work phone	

1 Property

2 Landlord

Create Lettings Property

Lettings Property

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

Furnished: Unfurnished
Bedrooms: 4
Receptions: 3

Property Type: Barn Conversion
Bathrooms: 4

Primary Landlord

[Use Existing Record](#)

Title	Forename *	Surname *
Lord	David	Morgan
Email *		Mobile phone
crm.training@iamproperty.com		
Phone number	Work phone	

1 Property

2 Landlord

Lettings Property

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

Furnished: Unfurnished
Bedrooms: 4
Receptions: 3

Primary Landlord

Title

Forename *

Lord

David

Email *

crm.training@iamproperty.com

Phone number

Work phone

⚠

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
Lettings Applicant

Use/Merge

David Morgan
Sales Applicant

Use/Merge

Or

Create New Record

1 Property

2 Landlord

12 Click this and enter the mobile phone number

Create Lettings Property

Lettings Property

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

Furnished: Unfurnished
Bedrooms: 4
Receptions: 3

Property Type: Barn Conversion
Bathrooms: 4

Use Existing Record

Primary Landlord

Title

Forename *

Surname *

Lord

David

Morgan

Email *

Mobile phone

crm.training@iamproperty.com

Phone number

Work phone

1 Property

2 Landlord

13 Click this text field.

The screenshot shows the 'Primary Landlord' form in the 'iam property' system. The form is titled 'Primary Landlord' and has a progress indicator on the right side showing '1 Property' and '2 Landlord'. The form fields are as follows:

- Title: Dropdown menu with 'Lord' selected.
- Forename: Text field with 'David' entered.
- Surname: Text field with 'Morgan' entered.
- Email: Text field with 'crm.training@iamproperty.com' entered.
- Mobile phone: Text field with '07802200655' entered.
- Phone number: Text field, highlighted with an orange circle.
- Work phone: Text field.
- Branch: Dropdown menu with 'Morgan & Co' selected.
- Negotiator: Dropdown menu with 'Training Dave' selected.
- Landlord's address is different to the property: Checked checkbox.
- Search postcode: Text field with placeholder 'Enter a full postcode' and a search icon.
- Or Enter Address Manually: Link below the search postcode field.

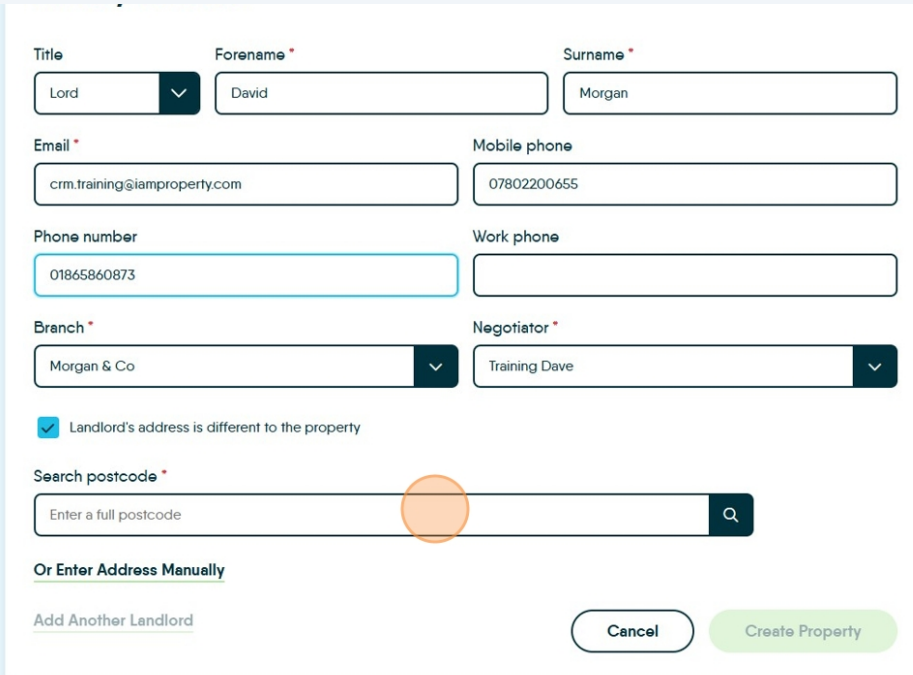


Tip! If the main contact number is a mobile phone number then add the number to both the Mobile Phone and the Phone Number fields. This applies to all Landlords.

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

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Click the "Search postcode *" field type the Landlords address , if it is different from the Property being rented.



The form contains the following fields and options:

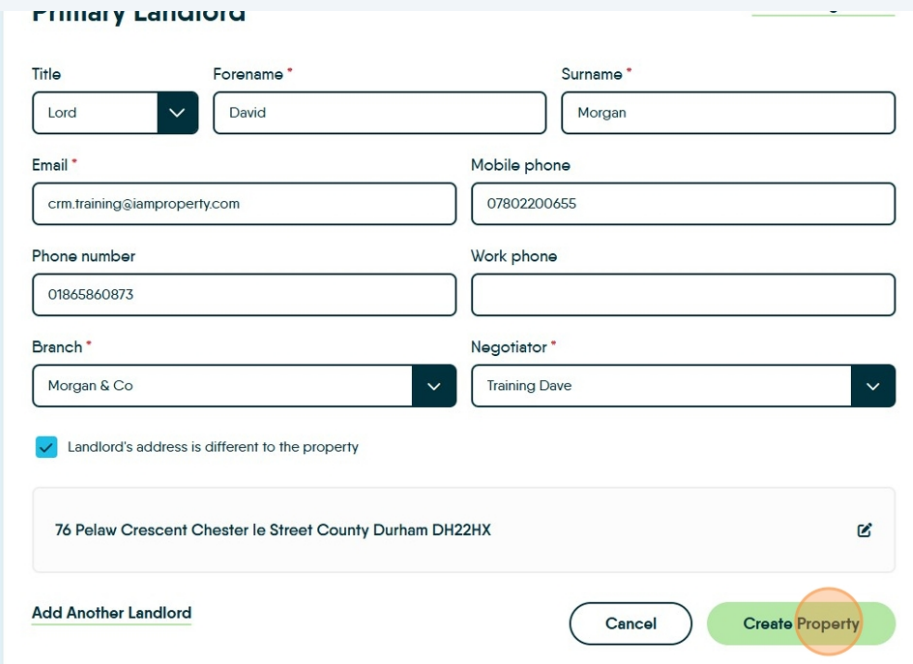
- Title**: Dropdown menu with 'Lord' selected.
- Forename ***: Text input with 'David'.
- Surname ***: Text input with 'Morgan'.
- Email ***: Text input with 'crm.training@iamproperty.com'.
- Mobile phone**: Text input with '07802200655'.
- Phone number**: Text input with '01865860873'.
- Work phone**: Empty text input.
- Branch ***: Dropdown menu with 'Morgan & Co' selected.
- Negotiator ***: Dropdown menu with 'Training Dave' selected.
- ☒ Landlord's address is different to the property
- Search postcode ***: Text input with placeholder 'Enter a full postcode'. An orange circle highlights this field.
- [Or Enter Address Manually](#)
- [Add Another Landlord](#)
- Buttons**: 'Cancel' and 'Create Property'.

- 1 Property
- 2 Landlord

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If there is a second Landlord click the "Add Another Landlord" option and complete the details.

Click "Create property"



The form contains the following fields and options:

- Title**: Dropdown menu with 'Lord' selected.
- Forename ***: Text input with 'David'.
- Surname ***: Text input with 'Morgan'.
- Email ***: Text input with 'crm.training@iamproperty.com'.
- Mobile phone**: Text input with '07802200655'.
- Phone number**: Text input with '01865860873'.
- Work phone**: Empty text input.
- Branch ***: Dropdown menu with 'Morgan & Co' selected.
- Negotiator ***: Dropdown menu with 'Training Dave' selected.
- ☒ Landlord's address is different to the property
- Address**: Text input with '76 Pelaw Crescent Chester le Street County Durham DH22HX'.
- [Add Another Landlord](#)
- Buttons**: 'Cancel' and 'Create Property'. An orange circle highlights the 'Create Property' button.

- 1 Property
- 2 Landlord



Tip! If there is a second (or more) Landlord 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 Landlord tab at the top of the Property Record Screen.

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On the final screen there is an option to review the information added and edit.

Create Lettings Property



Success

Property

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

View Property

Landlords

David Morgan

View User

If the Lettings Property is Same Address to Landlord

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Untick the highlighted option at the bottom of the screen. Click the "Create Property" button.

Primary Landlord Use Existing Record

Title Forename Surname

Email Mobile phone

Phone number Work phone

Branch Negotiator

☐ Landlord's address is different to the property

[Add Another Landlord](#) Cancel Create Property

1 Property
2 Landlord



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 Landlord record, for example you may have a Checklist enabled or UDF that need completion.