

Core Process Simplification - Adding a New Lettings Property in CRM



Using the NEW Core Process Simplification screens.

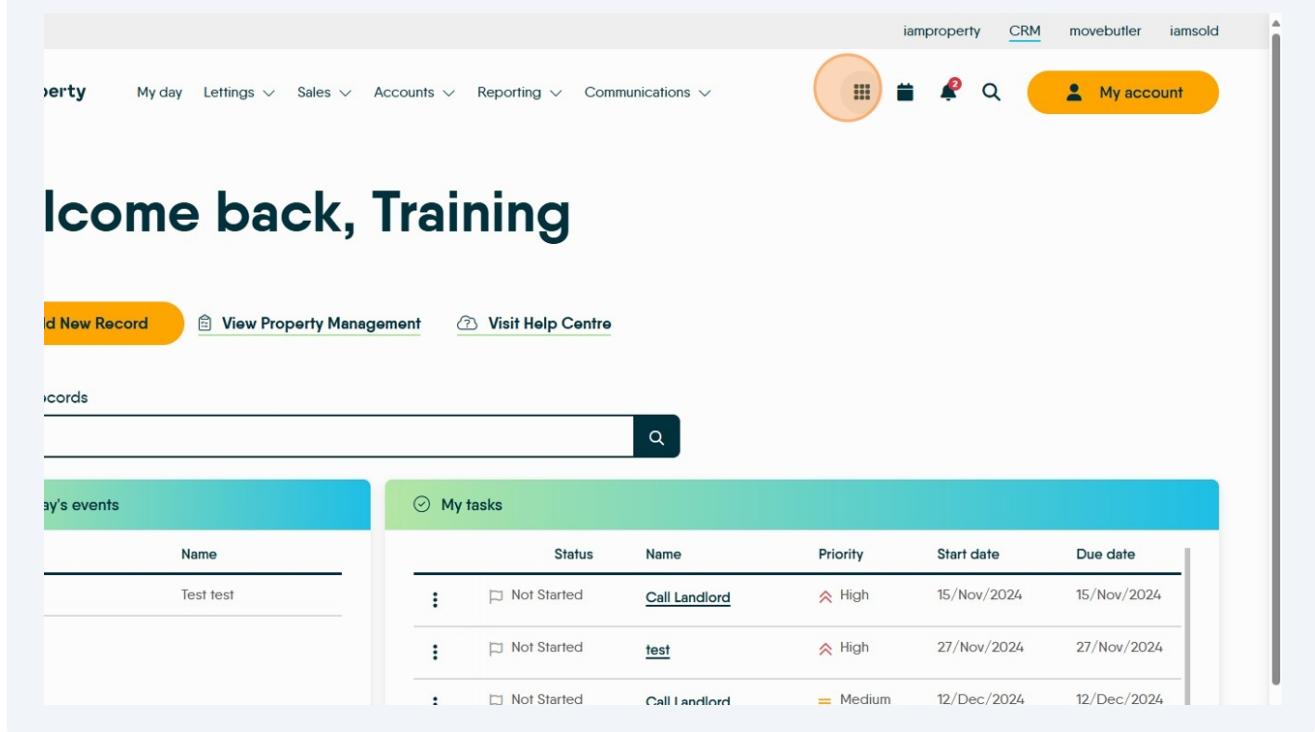
This guide provides a straightforward, step-by-step approach to adding a new Lettings Property in the CRM system. It simplifies what can be a complex task into manageable actions, ensuring users can efficiently navigate the CRM platform. By following these steps, users can save time, reduce errors, and enhance their productivity in managing lettings applicants.

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

The screenshot shows the 'My Day' dashboard of the CRM system. At the top, there is a navigation bar with links for 'My day', 'Lettings', 'Sales', 'Accounts', 'Reporting', 'Communications', and a 'My account' button. 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 listing four tasks. The tasks are as follows:

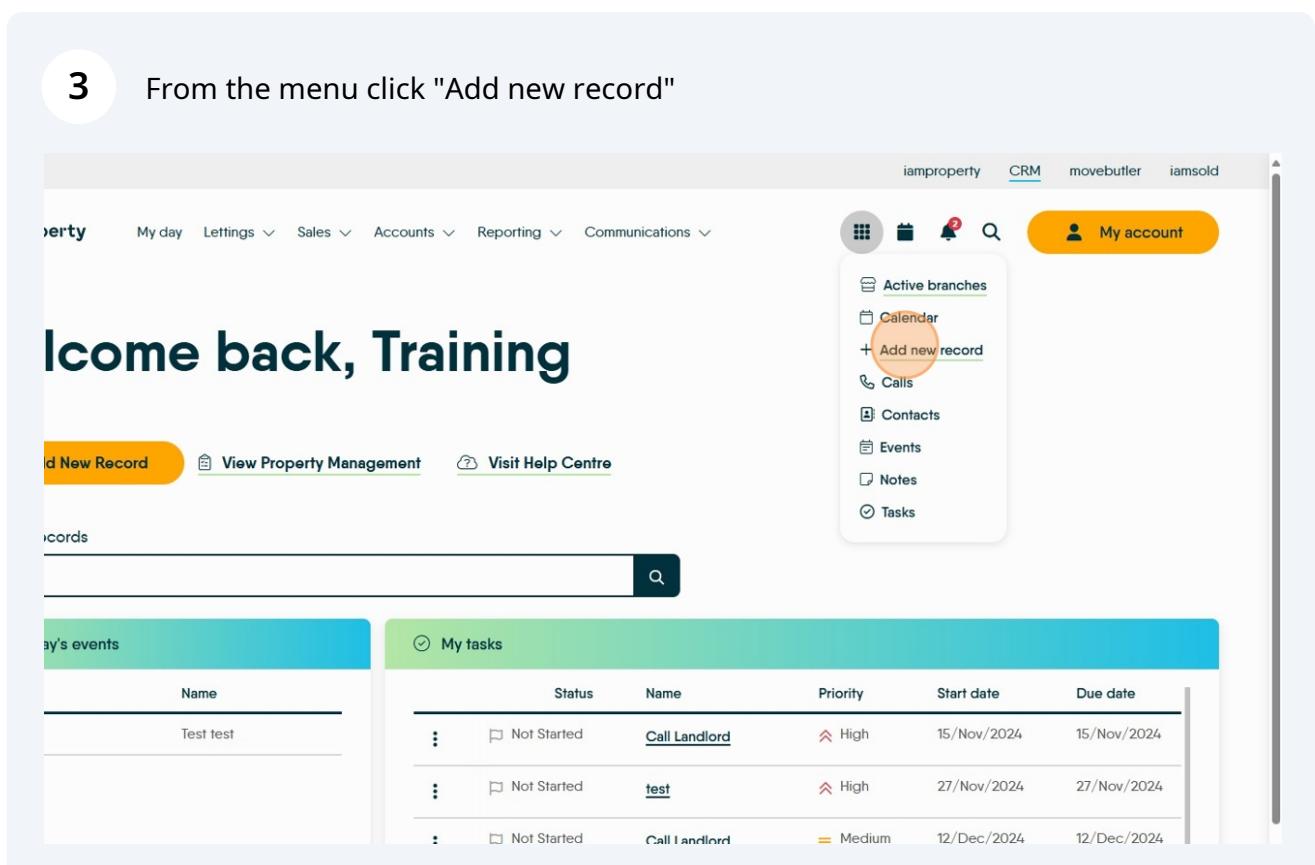
	Status	Name	Priority	Start date	Due date
...	Not Started	Call Landlord	High	15/Nov/2024	15/Nov/2024
...	Not Started	test	High	27/Nov/2024	27/Nov/2024
...	Not Started	Call Landlord	Medium	12/Dec/2024	12/Dec/2024
...	Not Started	Call back	High	03/Jan/2025	03/Jan/2025

2 Click "Bento" button.



The screenshot shows the 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

iamproperty CRM movebutler

My day Lettings Sales Accounts Reporting Communications

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 Property"

Add New Record

Select record type

Sales Applicant	Lettings Applicant	Sales Property
Lettings Property	Landlord	Portfolio
Vendor	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



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

6 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



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

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

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
<input type="text"/>	<input type="text"/>	<input type="text"/>
Branch *	Negotiator *	
Morgan & Co	<input type="text"/>	<input type="text"/>
Bedrooms	Period	Receptions
<input type="text"/>	Pre-war	<input type="text"/>
	Post-war	
	Modern	
	New-build	

- 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
<input type="text"/>	<input type="text"/>	<input type="text"/>
Branch *	Negotiator *	
Morgan & Co	<input type="text"/>	<input type="text"/>
Bedrooms	Bathrooms	Furnished
<input type="text"/>	<input type="text"/>	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

Cancel

Continue

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



Forename *

Surname *

Email *

Mobile phone

Phone number

Work phone

1 Property

2 Landlord

11

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: Lord Forename: **Davvid** Surname: Morgan
Email: Mobile phone:
Phone number: Work phone:



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: Lord Forename: **David** Surname: Morgan
Email: **crm.training@iamproperty.com** Mobile phone:
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](#)

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

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

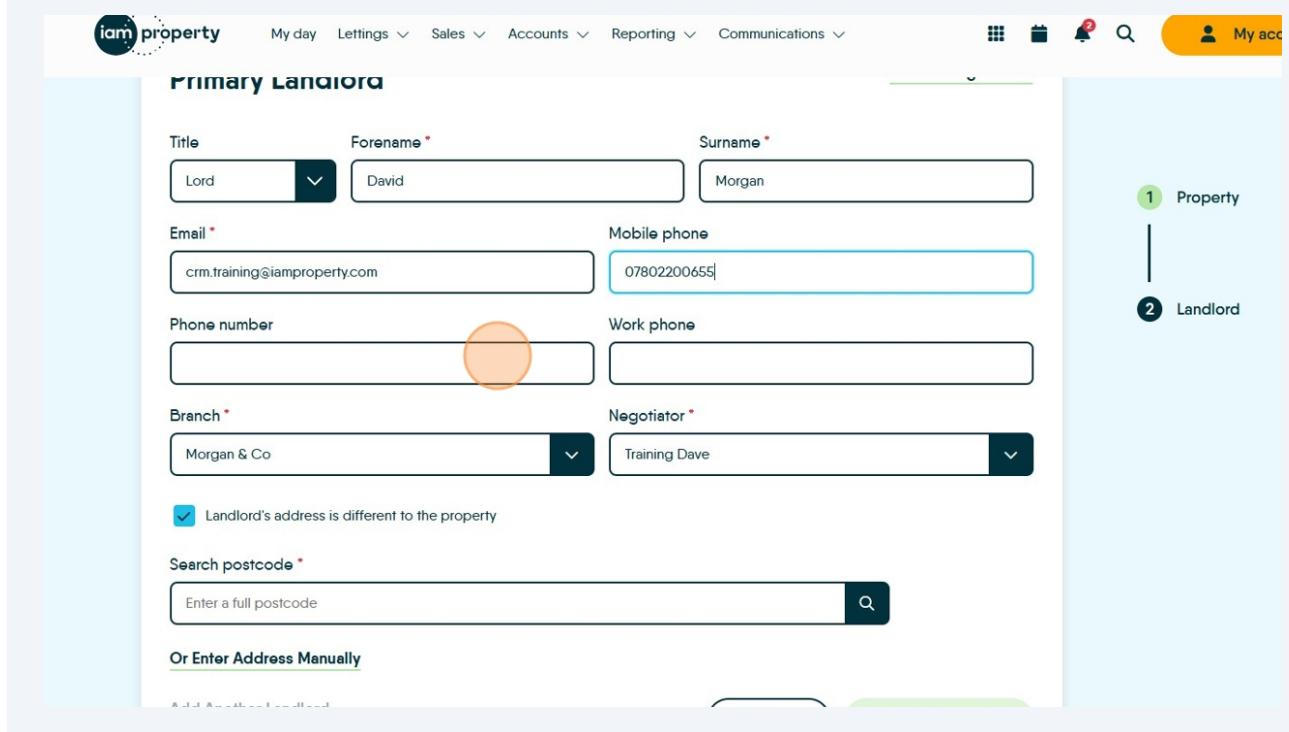
Primary Landlord

[Use Existing Record](#)

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

1 Property
2 Landlord

13 Click this text field.



The screenshot shows the 'Primary Landlord' form in the iam property software. The form includes fields for Title (Lord), Forename (David), Surname (Morgan), Email (crm.training@iamproperty.com), Mobile phone (07802200655), Phone number (highlighted with a red circle), Work phone, Branch (Morgan & Co), Negotiator (Training Dave), and a checkbox for 'Landlord's address is different to the property'. Below the form is a search bar for 'Search postcode' and a link to 'Or Enter Address Manually'.

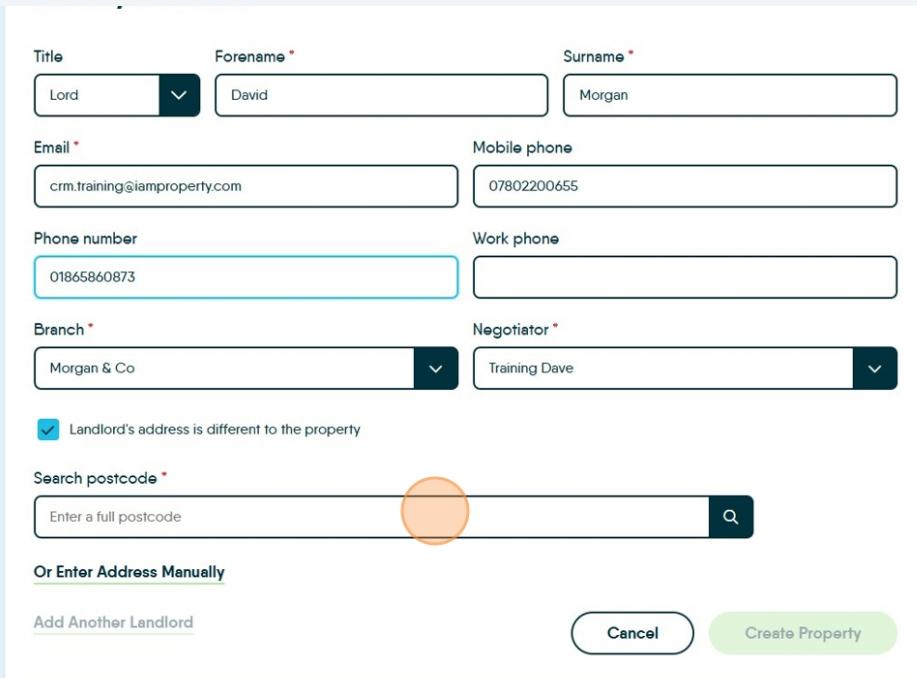


Tip! If the main contact number is a mobile phone number then add the number to both the Mobile Phone and the Phone Number fields. This applies to all Landlords.

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

14

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



1 Property

2 Landlord

Title Forename * Surname *

Lord David Morgan

Email * Mobile phone

crm.training@iamproperty.com 07802200655

Phone number Work phone

01865860873

Branch * Negotiator *

Morgan & Co Training Dave

Landlord's address is different to the property

Search postcode *

Enter a full postcode

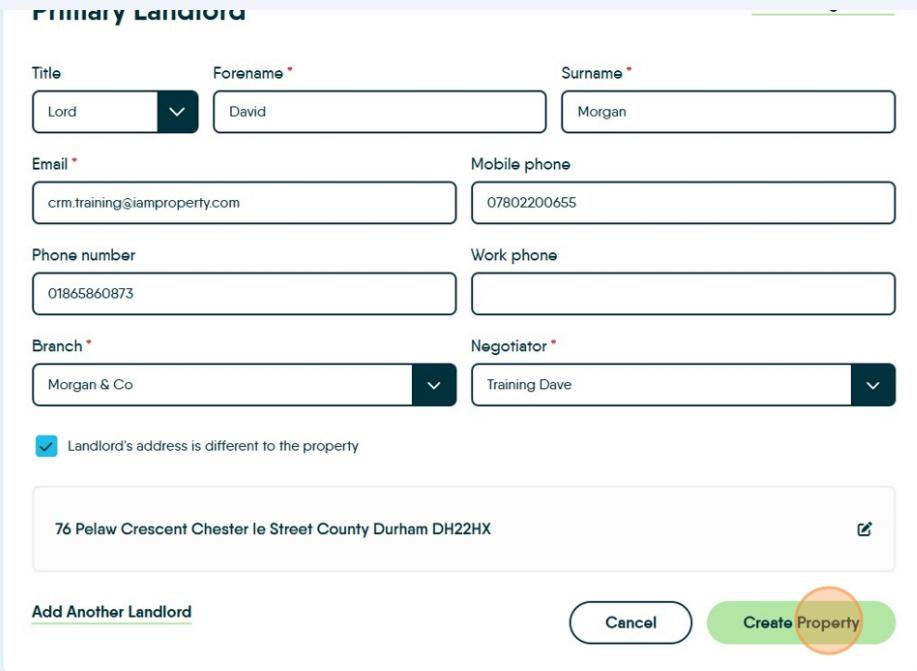
Or Enter Address Manually

Add Another Landlord

15

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

Click "Create property"



1 Property

2 Landlord

Title Forename * Surname *

Lord David Morgan

Email * Mobile phone

crm.training@iamproperty.com 07802200655

Phone number Work phone

01865860873

Branch * Negotiator *

Morgan & Co Training Dave

Landlord's address is different to the property

76 Pelaw Crescent Chester le Street County Durham DH22HX

Add Another Landlord



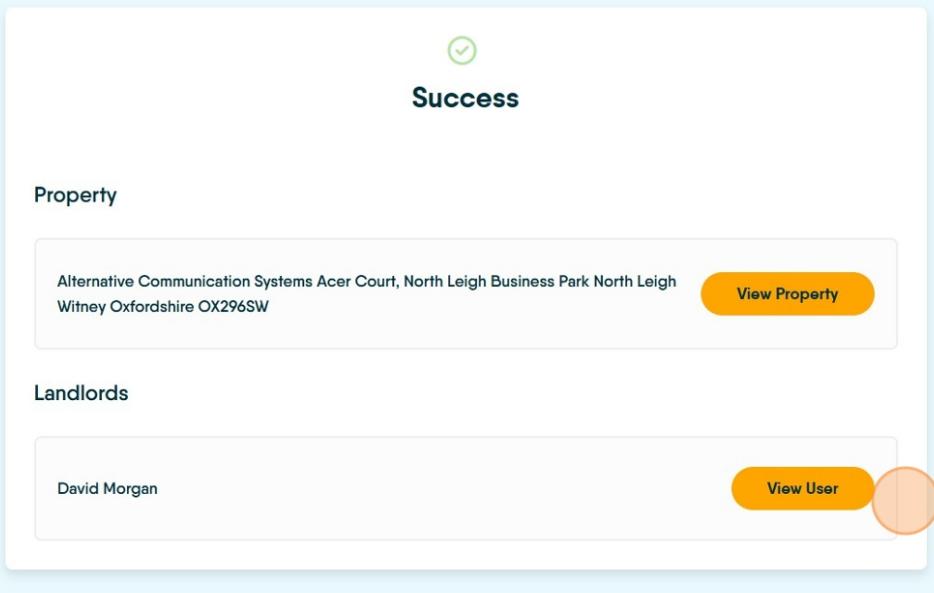
Tip! If there is a second (or more) Landlord then it is good practice to add the second as a new record. EVEN WHEN the client is a married couple.

Any additional vendors can be added in the Property Record via the Landlord tab at the top of the Property Record Screen.

16

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

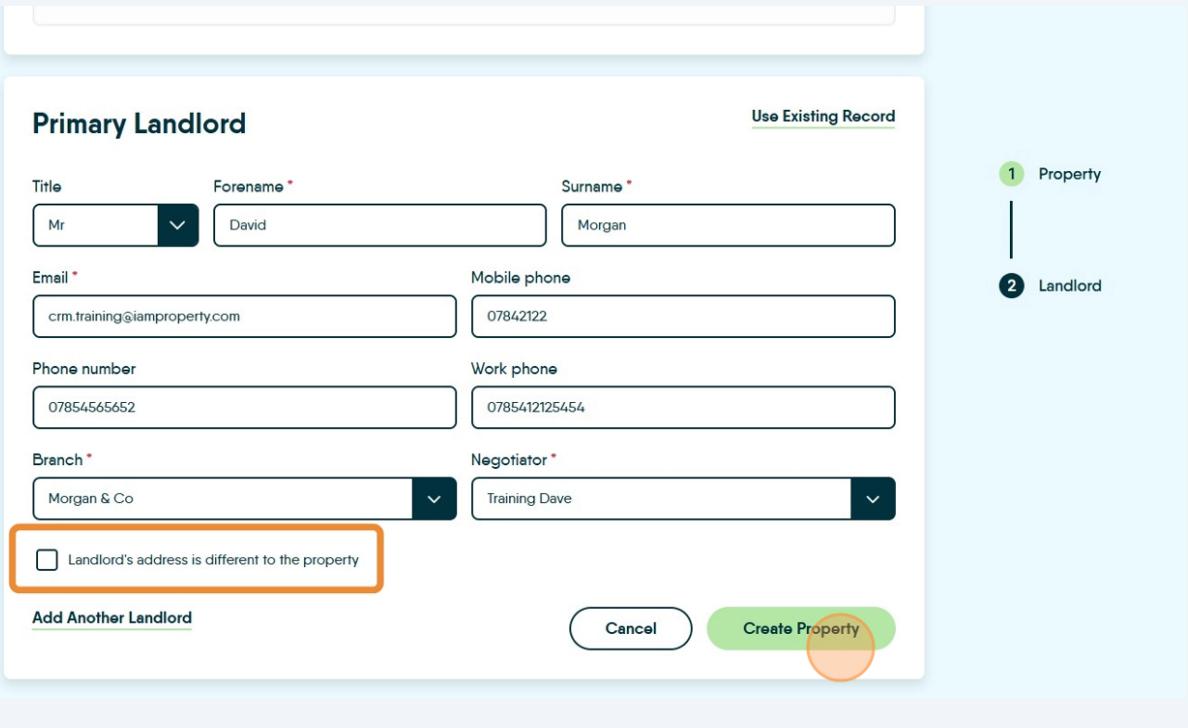
Create Lettings Property



If the Lettings Property is Same Address to Landlord

17

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



Primary Landlord

[Use Existing Record](#)

1 Property

2 Landlord

Title	Forename *	Surname *
Mr	David	Morgan
Email *	Mobile phone	
crm.training@iamproperty.com	07842122	
Phone number	Work phone	
07854565652	0785412125454	
Branch *	Negotiator *	
Morgan & Co	Training Dave	

Landlord's address is different to the property

[Add Another Landlord](#)

[Cancel](#) [Create Property](#)



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.