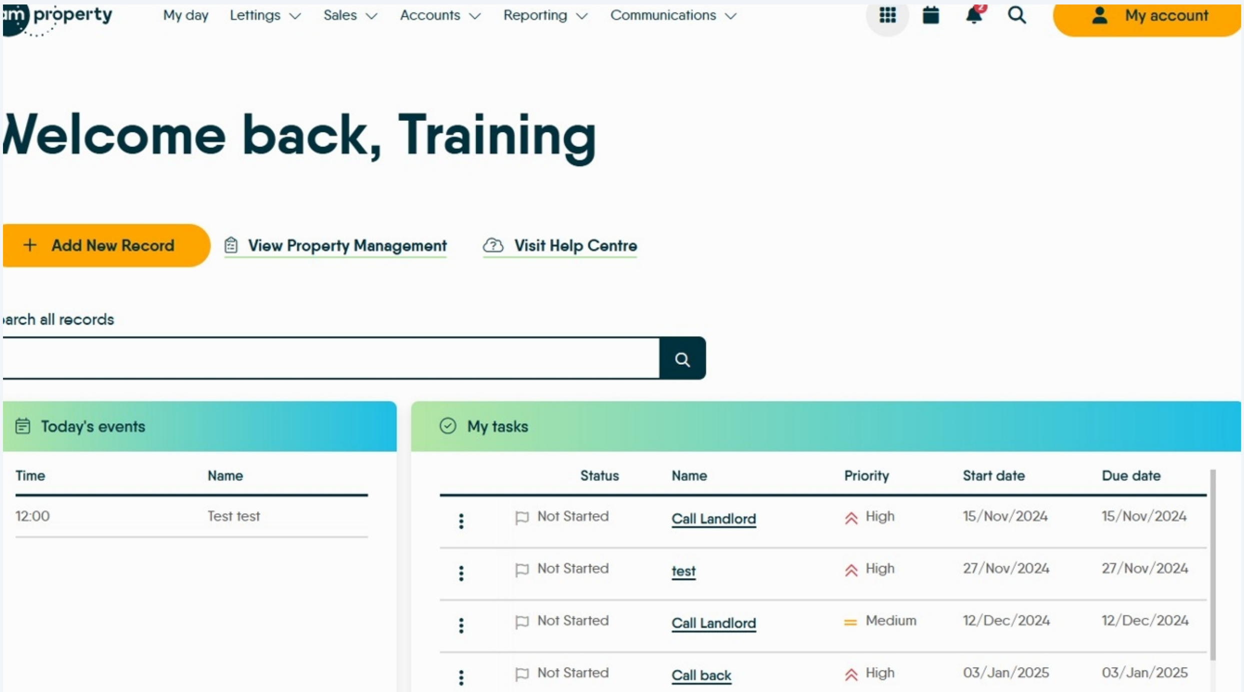
Core Process Simplification - Adding a New Landlord in CRM

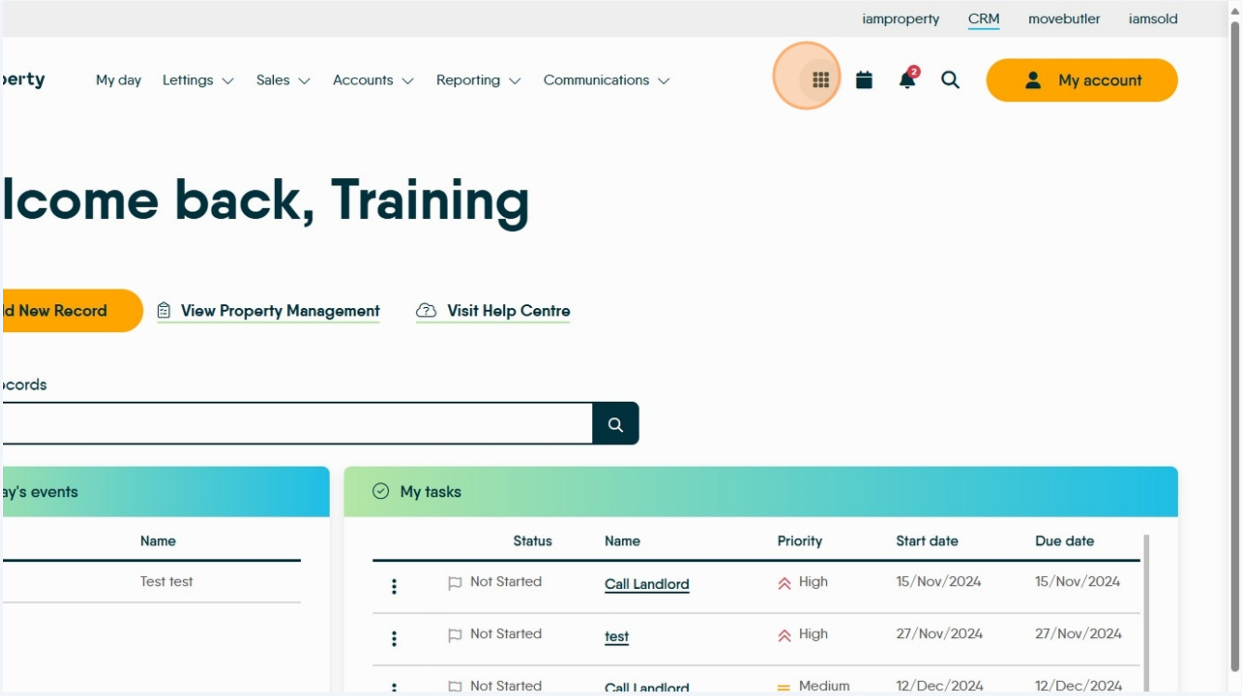
Using the NEW Core Process Simplification screens.

This guide provides a straightforward, step-by-step approach to adding a new Landlord 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.

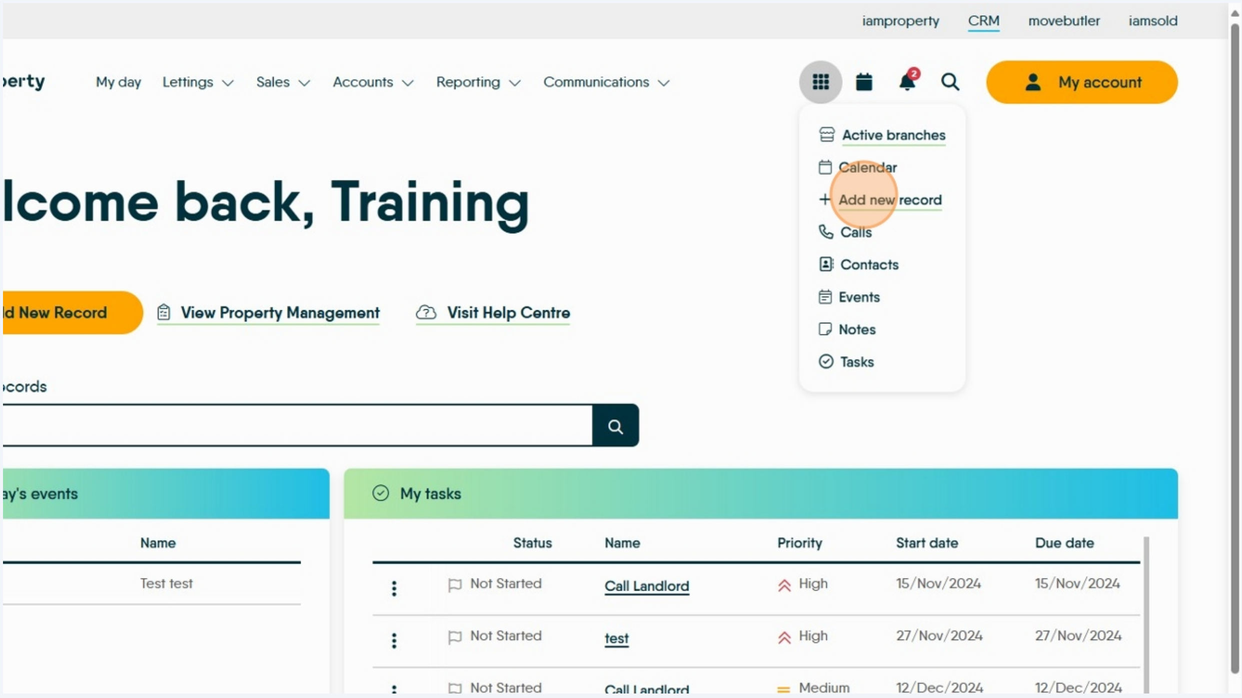
1 Navigate to https://crm.iamproperty.com/MyDay



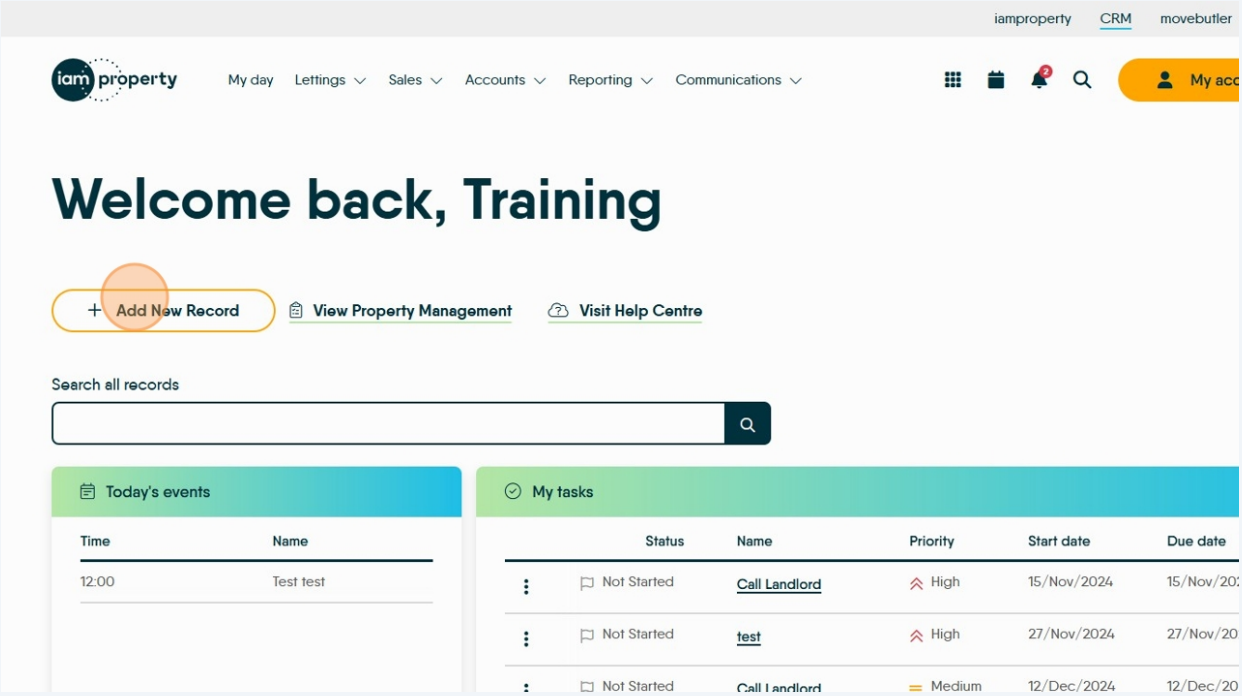
2 Click "Bento" button.



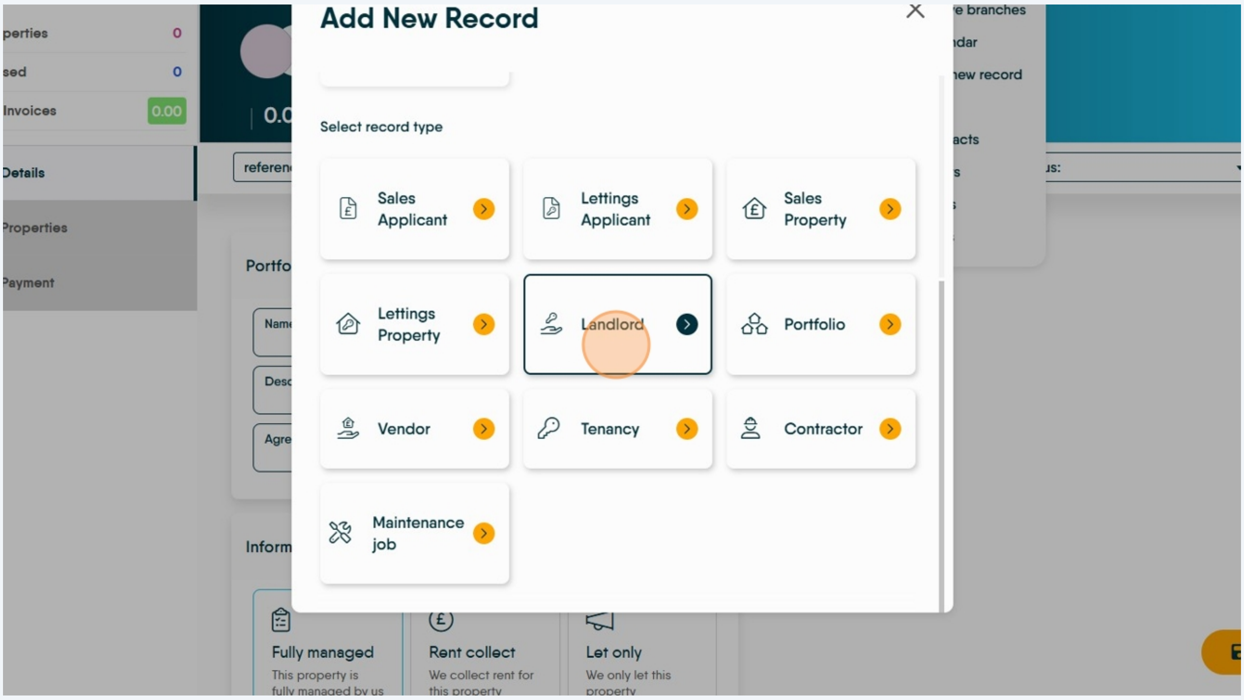
3 From the menu click "Add new record"



4 OR Click "Add New Record" on the 'My Day' screen



5 Click "Landlord"



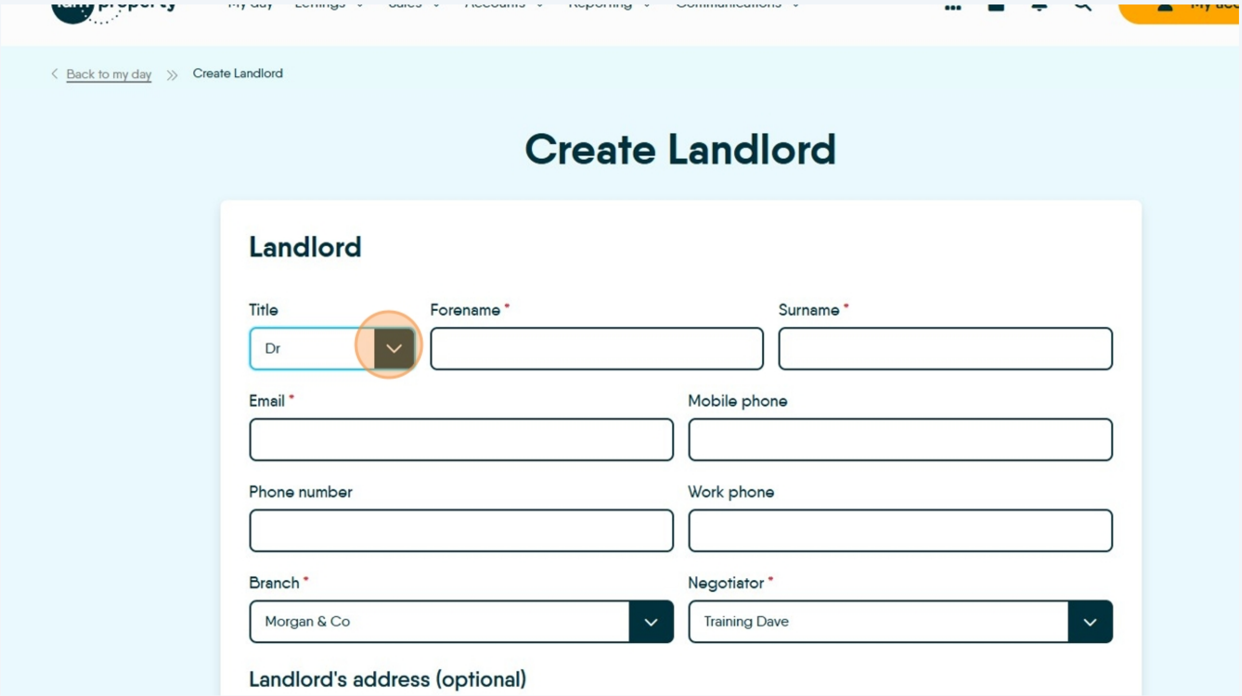
Tip! This process only creates a Landlord record, no Lettings properties are added at this point.

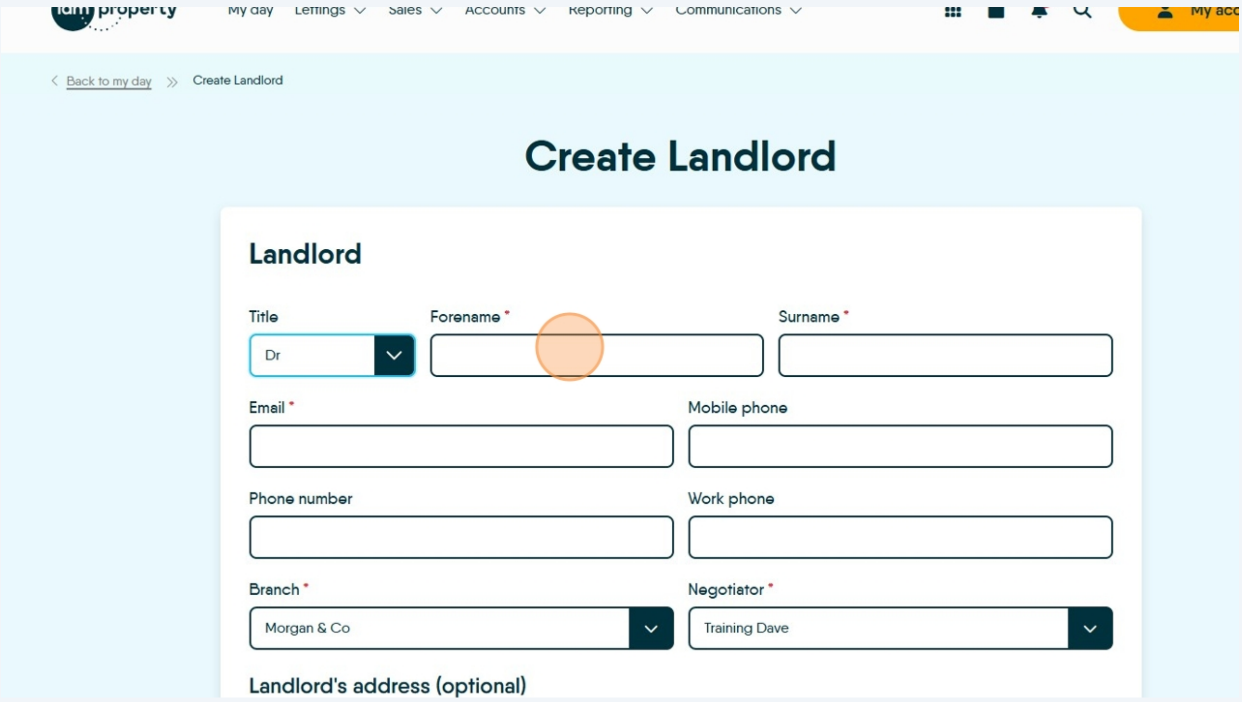
6

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.

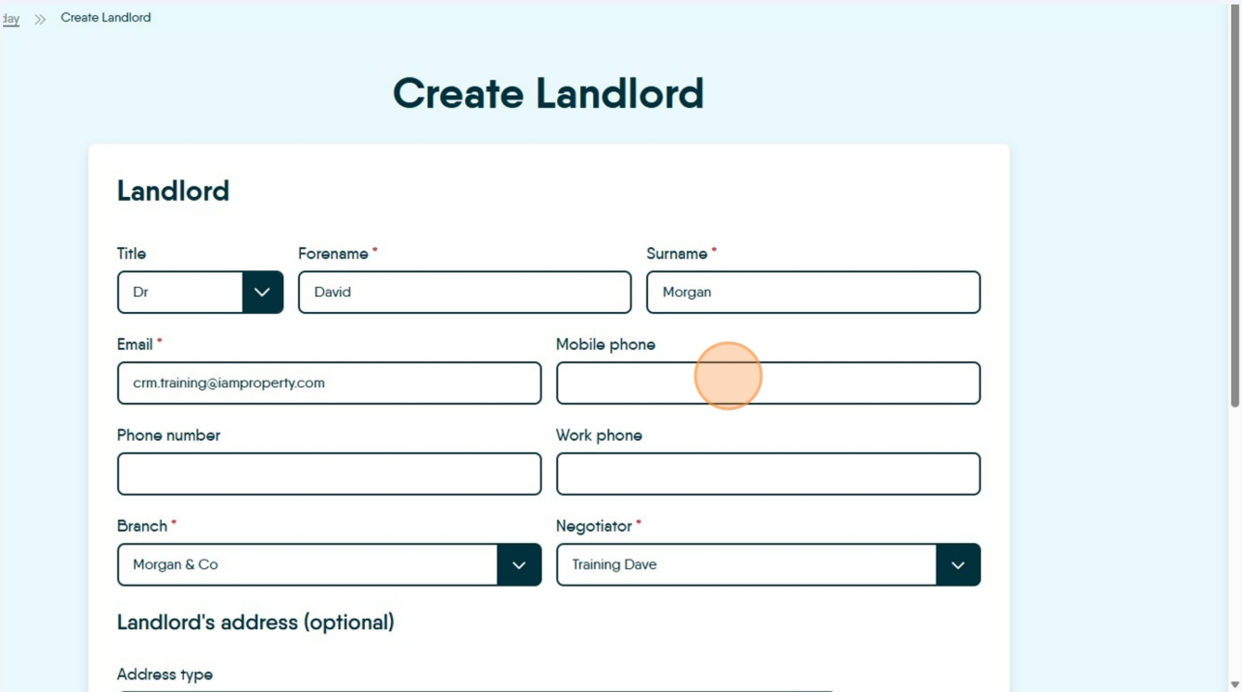
Click "Create new record" if you want to manually create a new client record with the duplicate email address





7 Add in the Mobile Phone, Phone Number and if required Work Phone numbers for the Landlord.

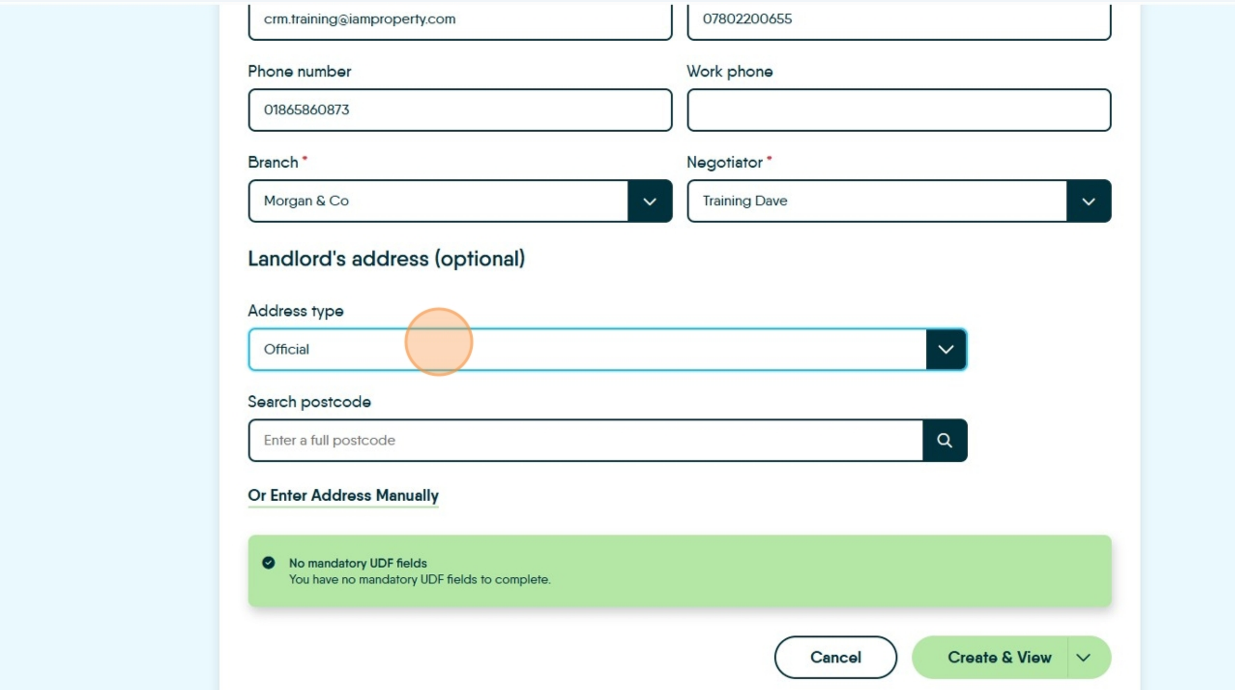
If the main contact number is a Mobile Number copy this number into the Phone Number field. This allows phone calls to be logged and SMS to be sent correctly from CRM.



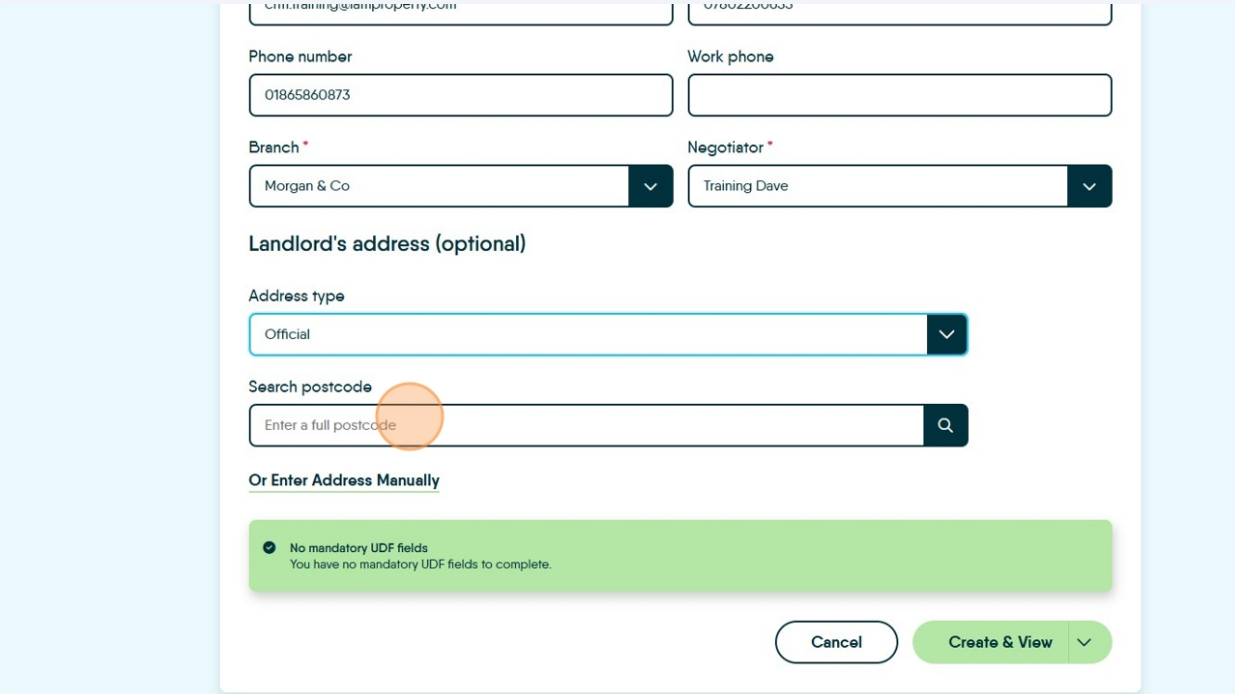
Tip! If the main contact number is a mobile phone number then add the number to both the Mobile Phone and the Phone Number fields. This applies to all Landlords.

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

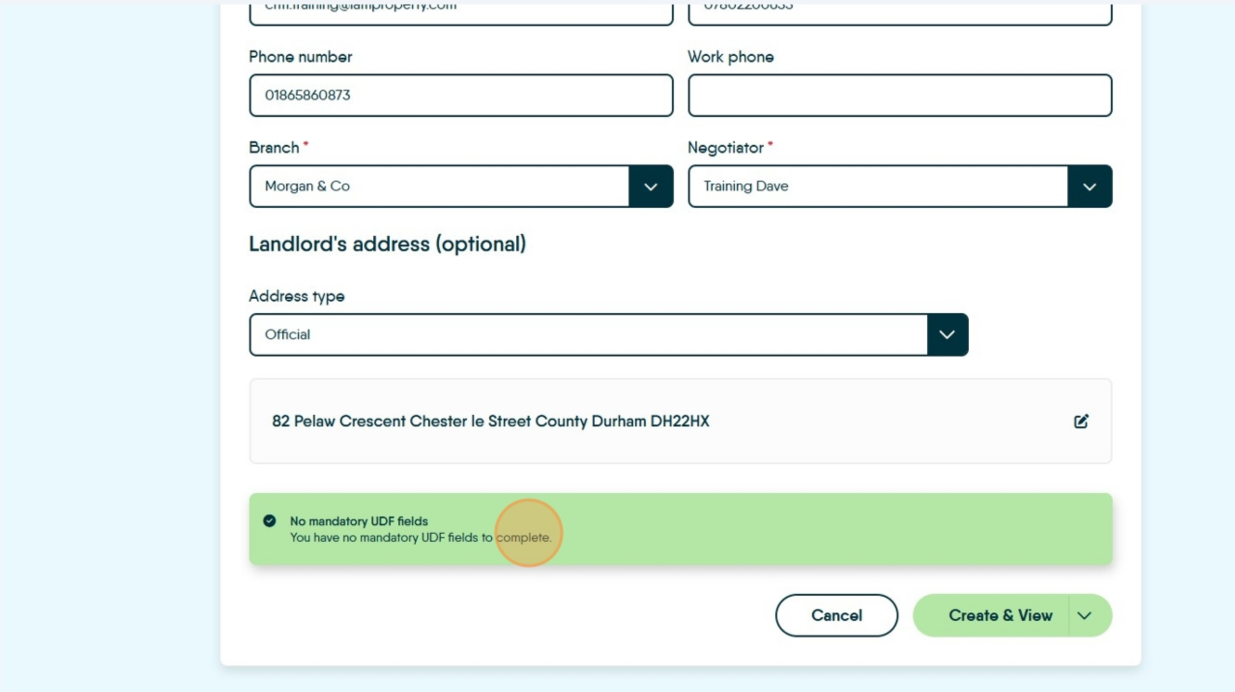
8 Select the "Address Type" option for the Landlord.



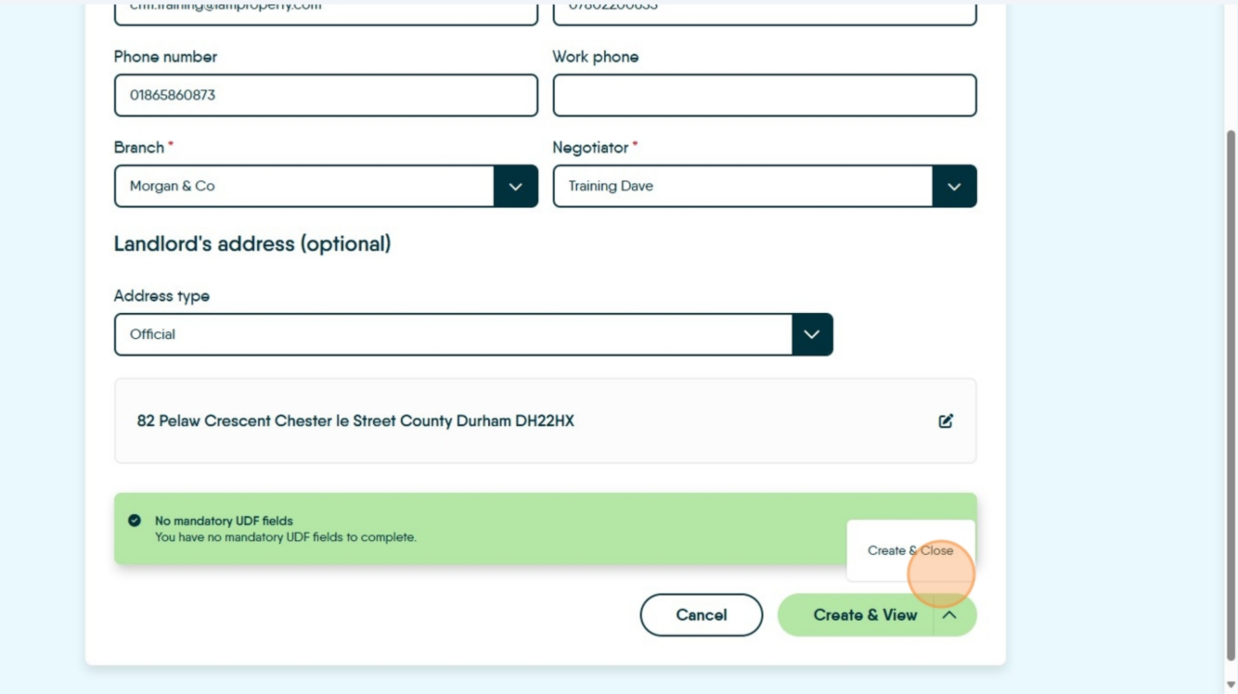
9 Click the "Search postcode" field select the Landlords address from the drop down menu.



10 If there are any UDF created relating to Landlord records they will show here..



11 Click "Create & View" or "Create & close" to complete the new record.



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.

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.