

# 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>

The screenshot shows the 'MyDay' dashboard in the iamproperty CRM. The top navigation bar includes 'My day', 'Lettings', 'Sales', 'Accounts', 'Reporting', and 'Communications'. A search bar is present on the right. The main heading is 'Welcome back, Training'. Below this are three buttons: '+ Add New Record', 'View Property Management', and 'Visit Help Centre'. A search bar for 'Search all records' is located below the buttons. The dashboard is divided into two main sections: 'Today's events' and 'My tasks'.

| Time  | Name      |
|-------|-----------|
| 12:00 | Test test |

| Status      | Name                          | Priority | Start date  | Due date    |
|-------------|-------------------------------|----------|-------------|-------------|
| Not Started | <a href="#">Call Landlord</a> | High     | 15/Nov/2024 | 15/Nov/2024 |
| Not Started | <a href="#">test</a>          | High     | 27/Nov/2024 | 27/Nov/2024 |
| Not Started | <a href="#">Call Landlord</a> | Medium   | 12/Dec/2024 | 12/Dec/2024 |
| Not Started | <a href="#">Call back</a>     | 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 navigation links, a main content area with a 'Welcome back, Training' message, and a sidebar with a search bar and a 'My tasks' section.

iamproperty CRM movebutler iamsold

erty My day Lettings Sales Accounts Reporting Communications

elcome back, Training

id New Record View Property Management Visit Help Centre

records

ay's 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 dashboard includes a header with navigation links, a main content area with a 'Welcome back, Training' message, and a sidebar with a search bar and a 'My tasks' section.

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erty My day Lettings Sales Accounts Reporting Communications

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records

ay's 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 |

Active branches  
Calendar  
Add new record  
Calls  
Contacts  
Events  
Notes  
Tasks

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

The screenshot shows the 'My Day' screen in the ian property CRM. The top navigation bar includes links for 'My day', 'Lettings', 'Sales', 'Accounts', 'Reporting', and 'Communications'. The 'Add New Record' button is highlighted with an orange circle. Below the navigation bar, there is a search bar and two main sections: 'Today's events' and 'My tasks'.

**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 "Landlord"

The screenshot shows the 'Add New Record' modal in the ian property CRM. The modal is titled 'Add New Record' and contains a grid of record types. The 'Landlord' record type is highlighted with an orange circle.

**Add New Record**

Select record type

|                   |                    |                |
|-------------------|--------------------|----------------|
| Sales Applicant   | Lettings Applicant | Sales Property |
| Lettings Property | Landlord           | Portfolio      |
| Vendor            | Tenancy            | Contractor     |
| Maintenance job   |                    |                |



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

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

## Create Landlord

### Landlord

|                               |              |               |
|-------------------------------|--------------|---------------|
| Title                         | Forename *   | Surname *     |
| Dr                            |              |               |
|                               |              |               |
| Email *                       | Mobile phone |               |
|                               |              |               |
| Phone number                  |              | Work phone    |
|                               |              |               |
| Branch *                      |              | Negotiator *  |
| Morgan & Co                   |              | Training Dave |
| Landlord's address (optional) |              |               |

iam property My day Lettings Sales Accounts Reporting Communications My acc

< Back to my day >> Create Landlord

## Create Landlord

### Landlord

Title Forename \* Surname \*

Dr [ ] [ ]

Email \* Mobile phone

[ ] [ ]

Phone number Work phone

[ ] [ ]

Branch \* Negotiator \*

Morgan & Co Training Dave

Landlord's address (optional)

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.

iam >> Create Landlord

## Create Landlord

### Landlord

Title Forename \* Surname \*

Dr David Morgan

Email \* Mobile phone

crm.training@iamproperty.com [ ]

Phone number Work phone

[ ] [ ]

Branch \* Negotiator \*

Morgan & Co Training Dave

Landlord's address (optional)

Address type



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.

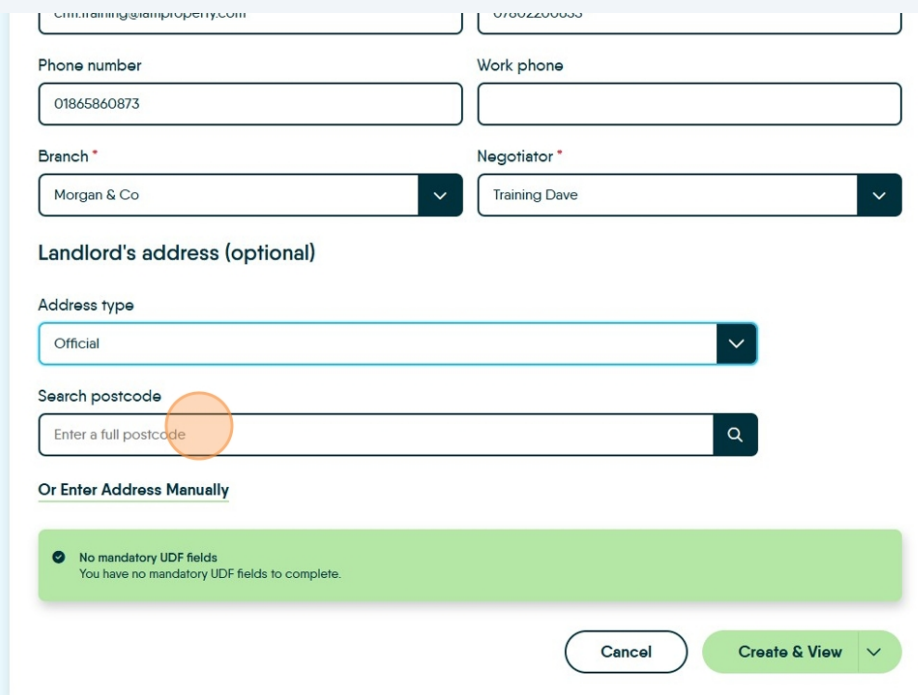
8

Select the "Address Type" option for the Landlord.

The screenshot shows a form for adding a landlord. At the top, there are two input fields: 'crm.training@iamproperty.com' and '07802200655'. Below these are 'Phone number' (01865860873) and 'Work phone' (empty). Then, 'Branch' (Morgan & Co) and 'Negotiator' (Training Dave) are shown as dropdown menus. The 'Landlord's address (optional)' section contains an 'Address type' dropdown menu with 'Official' selected, which is highlighted by an orange circle. Below this is a 'Search postcode' field with the placeholder 'Enter a full postcode' and a search icon. A section titled 'Or Enter Address Manually' contains a green box with the text: 'No mandatory UDF fields. You have no mandatory UDF fields to complete.' At the bottom right, there are 'Cancel' and 'Create & View' buttons.

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



Phone number: 
 Work phone:

Branch \*: 
 Negotiator \*:

**Landlord's address (optional)**

Address type:

Search postcode:

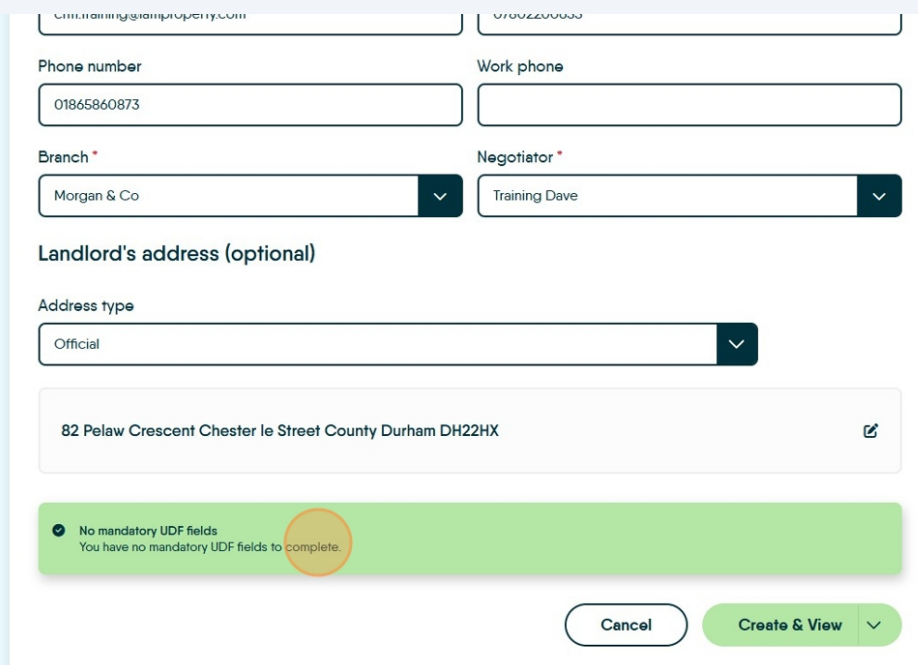
Or Enter Address Manually

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

Cancel Create & View

10

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



Phone number: 
 Work phone:

Branch \*: 
 Negotiator \*:

**Landlord's address (optional)**

Address type:

82 Pelaw Crescent Chester le Street County Durham DH22HX

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

Cancel Create & View

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

CRM training@iamproperty.com 07002200000

Phone number 01865860873 Work phone

Branch \* Morgan & Co ▼ Negotiator \* Training Dave ▼

Landlord's address (optional)

Address type Official ▼

82 Pelaw Crescent Chester le Street County Durham DH22HX

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

Create & Close

Cancel Create & View ^

**i** 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.

**i** 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.