

# Core Process Simplification - Adding a New Landlord in CRM



Using the NEW Core Process Simplification screens.

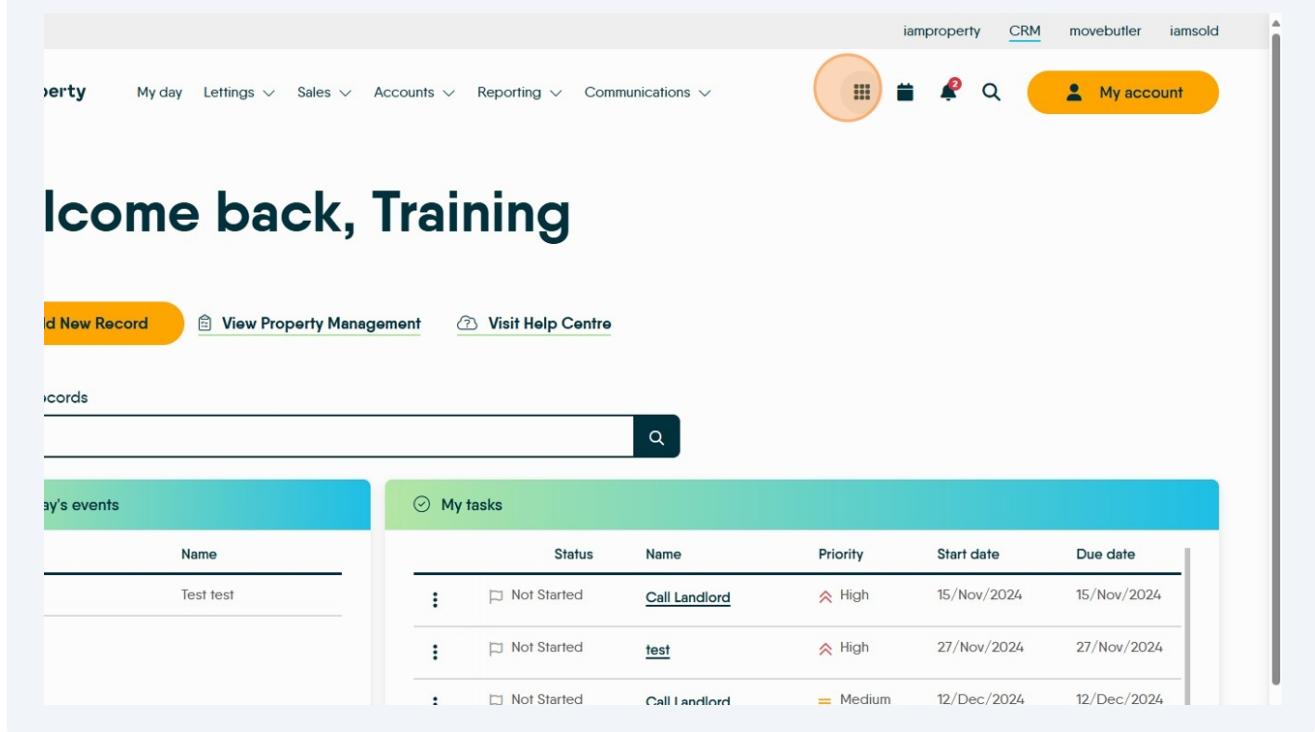
This guide provides a straightforward, step-by-step approach to adding a new Landlord in the CRM system. It simplifies what can be a complex task into manageable actions, ensuring users can efficiently navigate the CRM platform. By following these steps, users can save time, reduce errors, and enhance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

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

The screenshot shows the 'My Day' dashboard of the iam property CRM. At the top, there is a navigation bar with links for 'My day', 'Lettings', 'Sales', 'Accounts', 'Reporting', 'Communications', and a 'My account' dropdown. Below the navigation bar, a large 'Welcome back, Training' message is displayed. On the left, there is a 'Today's events' section with a table showing a single event at 12:00 with the name 'Test test'. On the right, there is a 'My tasks' section with a table showing four tasks. The tasks are:

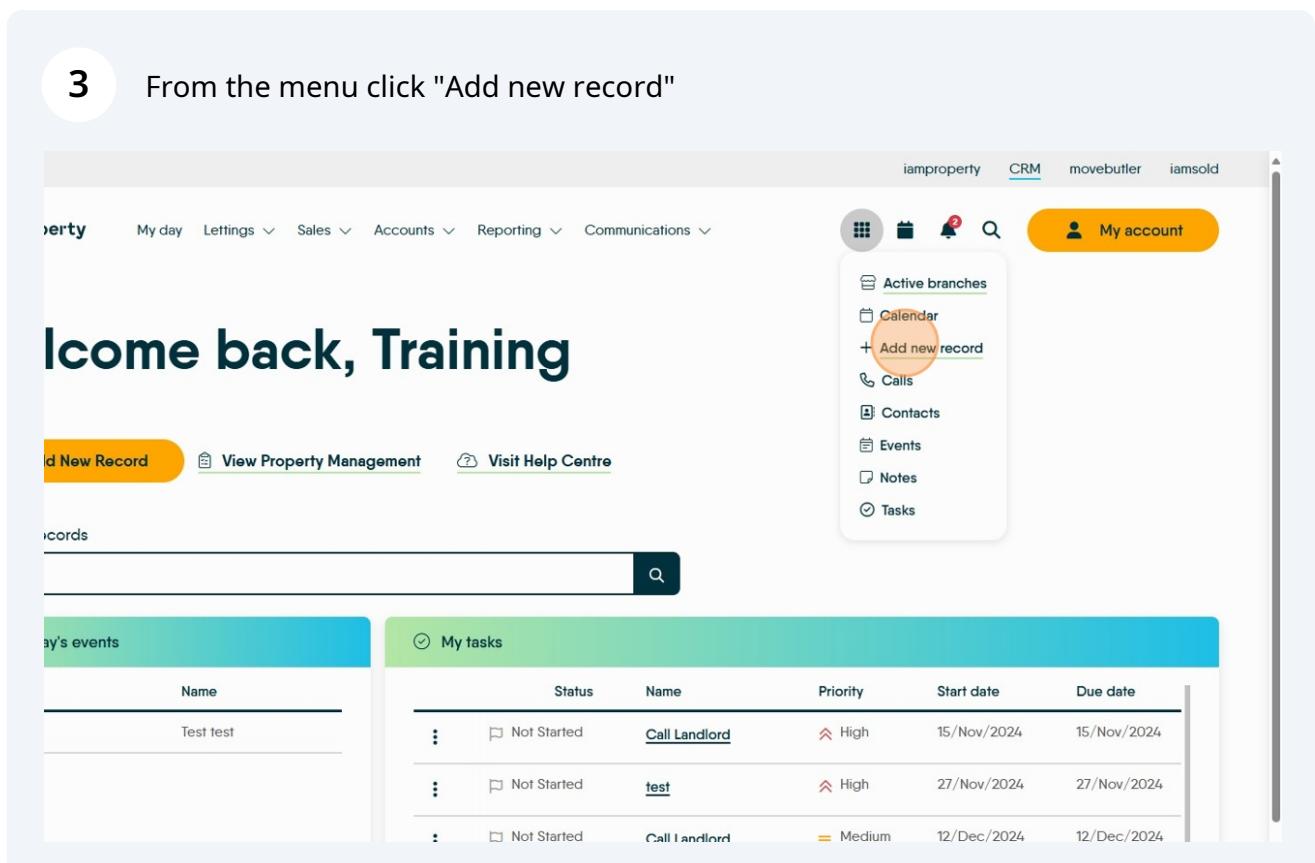
	Status	Name	Priority	Start date	Due date
⋮	Not Started	<a href="#">Call Landlord</a>	High	15/Nov/2024	15/Nov/2024
⋮	Not Started	<a href="#">test</a>	High	27/Nov/2024	27/Nov/2024
⋮	Not Started	<a href="#">Call Landlord</a>	Medium	12/Dec/2024	12/Dec/2024
⋮	Not Started	<a href="#">Call back</a>	High	03/Jan/2025	03/Jan/2025

2 Click "Bento" button.



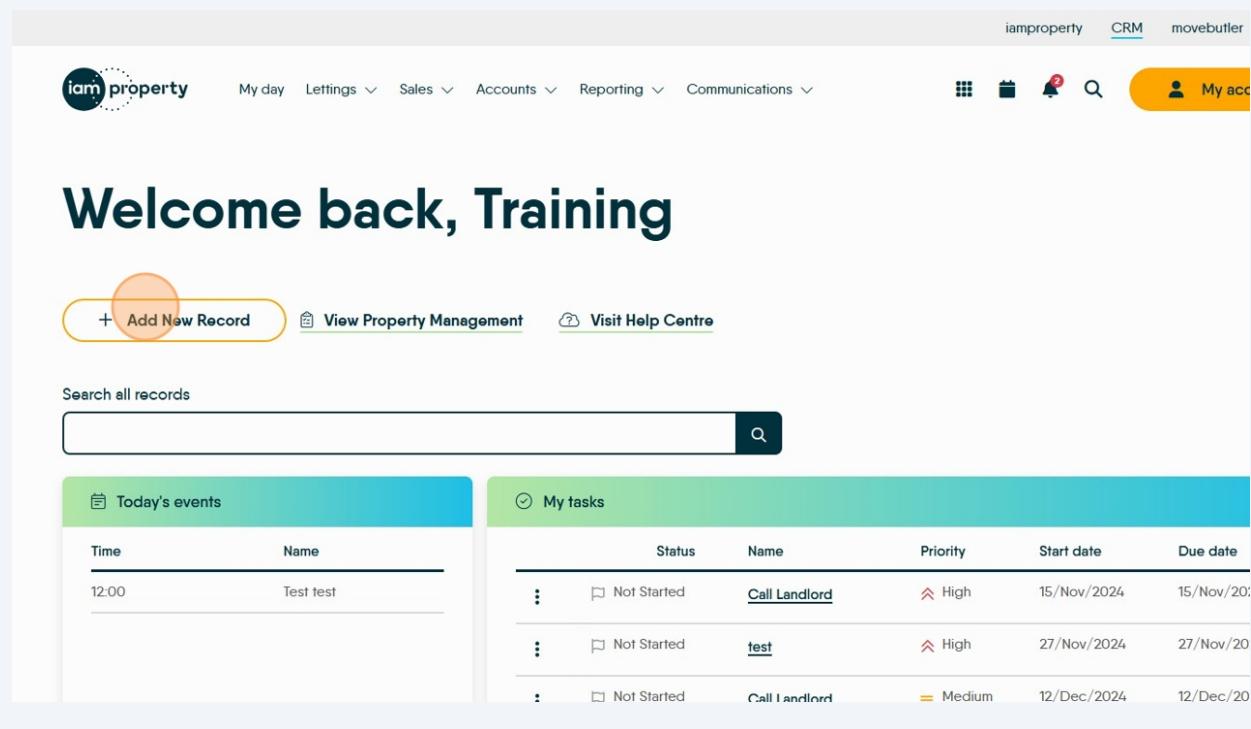
The screenshot shows the iProperty software interface. At the top, there is a navigation bar with links: 'My day', 'Lettings', 'Sales', 'Accounts', 'Reporting', and 'Communications'. On the right side of the top bar are icons for 'iamproperty', 'CRM', 'movebutler', and 'iamsold'. Below the top bar, there is a search bar and a 'My account' button. The main content area features a large title 'Icome back, Training'. 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). The 'Bento' button, which is orange and highlighted with a red circle, is located in the top right corner of the interface.

3 From the menu click "Add new record"



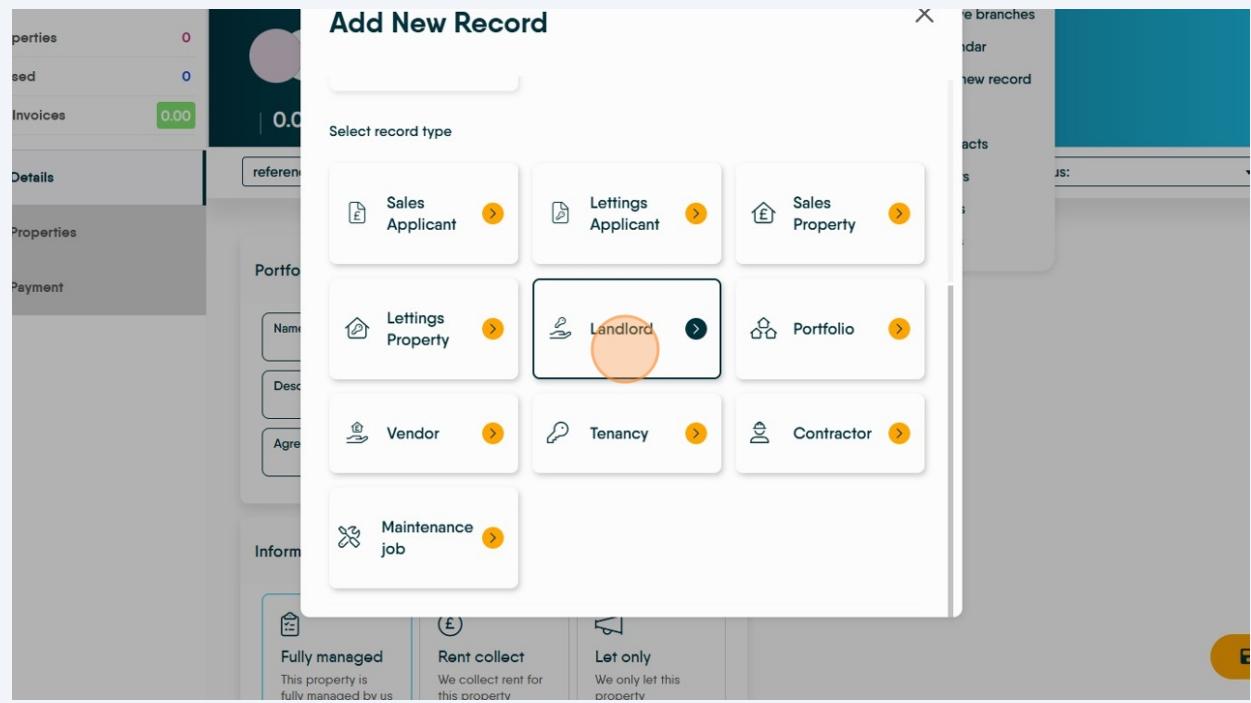
The screenshot shows the iProperty software interface, similar to the previous one but with a different view. The 'My tasks' section is visible, showing the same table with three tasks: 'Call Landlord', 'test', and 'Call Landlord'. The 'Bento' button is still present in the top right. A context menu is open, listing options: 'Active branches', 'Calendar', 'Add new record' (which is highlighted with a red circle), 'Calls', 'Contacts', 'Events', 'Notes', and 'Tasks'. The 'Add new record' option is the focal point of this step.

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



The screenshot shows the iamproperty 'My Day' screen. At the top, there are navigation links: 'My day', 'Lettings', 'Sales', 'Accounts', 'Reporting', and 'Communications'. On the right, there are icons for 'CRM' and 'movebutler', and a 'My acc' button. Below the navigation, the text 'Welcome back, Training' is displayed. There are three buttons: '+ Add New Record' (circled in orange), 'View Property Management', and 'Visit Help Centre'. A search bar with the placeholder 'Search all records' and a magnifying glass icon is present. The main area 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 shows three tasks: '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).

5 Click "Landlord"



The screenshot shows the 'Add New Record' dialog box. On the left, there is a sidebar with various property management categories: 'Properties', 'Tenants', 'Invoices', 'Details', 'Properties', 'Payment', 'Portfolio', 'Information', 'Fully managed', 'Rent collect', and 'Let only'. The main area is titled 'Add New Record' and has a sub-section 'Select record type'. It lists several options: 'Sales Applicant', 'Lettings Applicant', 'Sales Property', 'Lettings Property', 'Landlord' (circled in orange), 'Vendor', 'Tenancy', 'Portfolio', 'Contractor', and 'Maintenance job'. The 'Landlord' option is highlighted with a yellow circle.



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

The screenshot shows the 'Create Landlord' form in a CRM application. The 'Title' dropdown is highlighted with an orange circle. The form includes fields for Forename, Surname, Email, Mobile phone, Phone number, Work phone, Branch, Negotiator, and Landlord's address (optional).

Landlord	
Title	Forename *
Dr	<input type="text"/>
	<input type="text"/>
Email *	Mobile phone
<input type="text"/>	<input type="text"/>
Phone number	Work phone
<input type="text"/>	<input type="text"/>
Branch *	Negotiator *
Morgan & Co	Training Dave
Landlord's address (optional)	

&lt; Back to my day &gt;&gt; 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.

day &gt;&gt; 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.

crm.training@iamproperty.com 07802200655

Phone number Work phone

01865860873

Branch \* Negotiator \*

Morgan & Co Training Dave

Landlord's address (optional)

Address type

Official

Search postcode

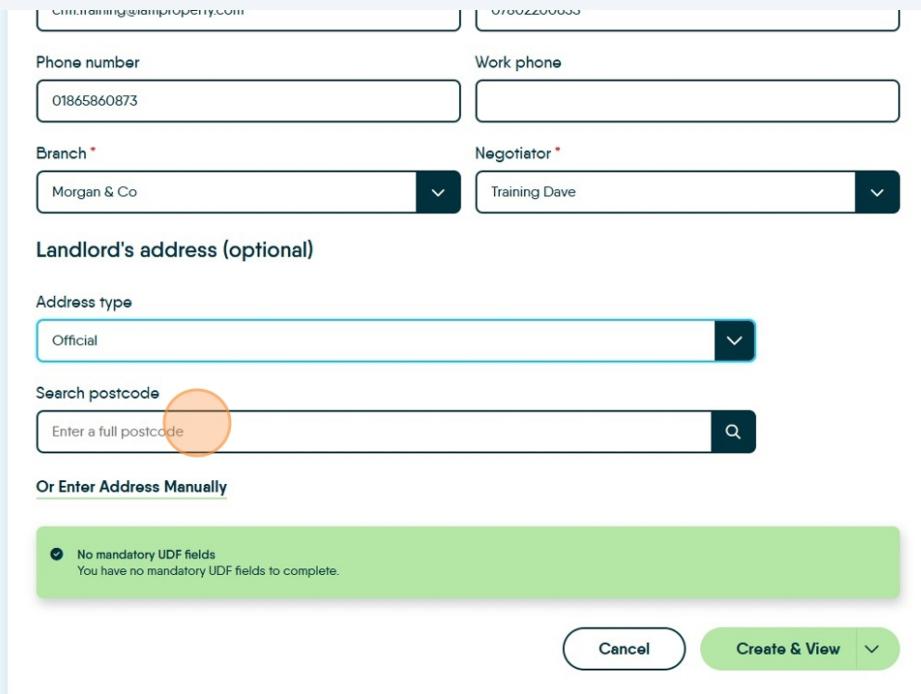
Enter a full postcode

Or Enter Address Manually

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

Cancel Create & View

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



Charnhury@ampproperty.com 07802200000

Phone number Work phone

01865860873

Branch \* Negotiator \*

Morgan & Co Training Dave

Landlord's address (optional)

Address type

Official

Search postcode

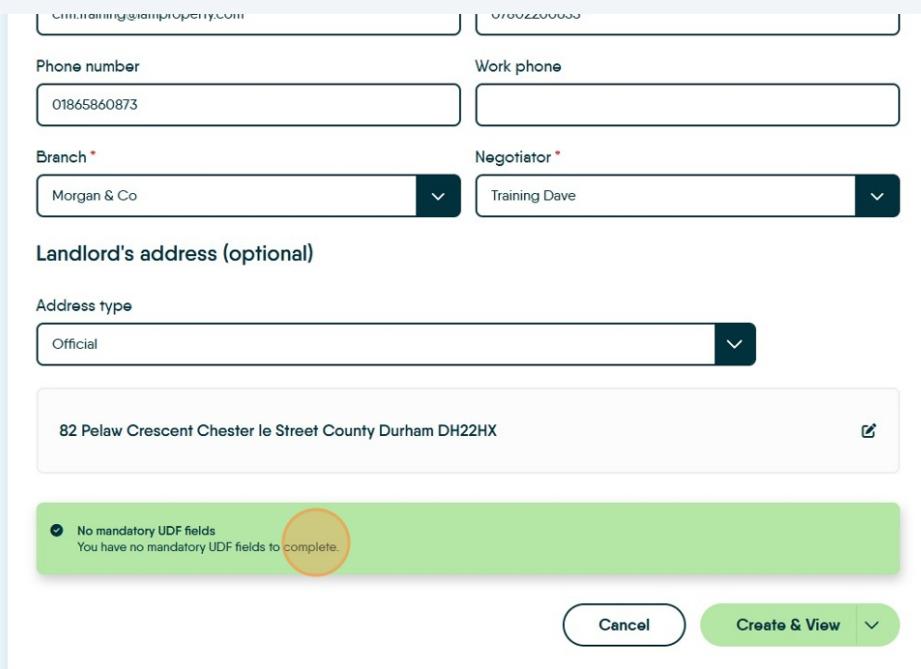
Enter a full postcode

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..



Charnhury@ampproperty.com 07802200000

Phone number Work phone

01865860873

Branch \* Negotiator \*

Morgan & Co Training Dave

Landlord's address (optional)

Address type

Official

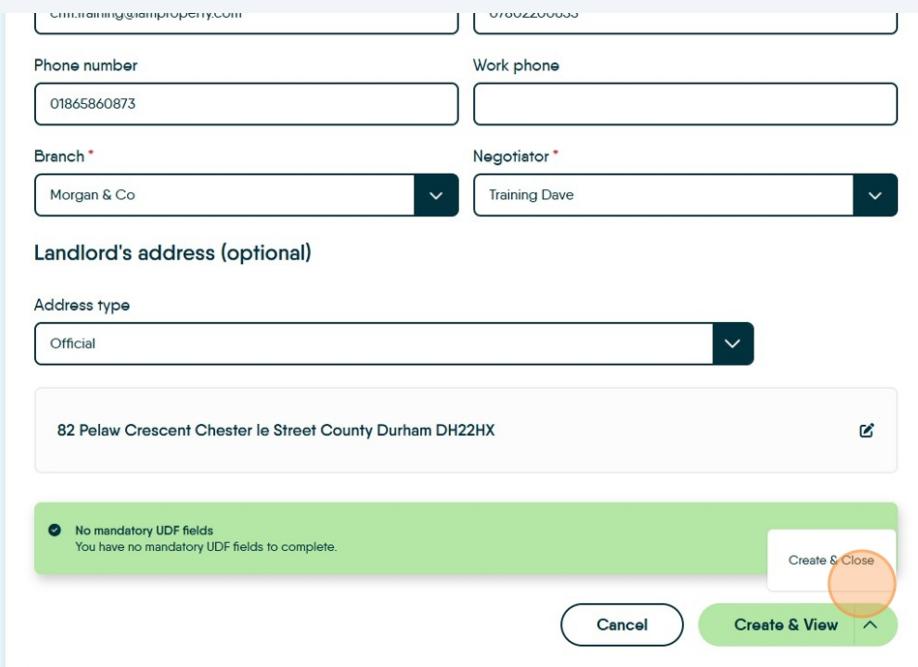
82 Pelaw Crescent Chester le Street County Durham DH22HX

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

Cancel Create & View

11

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



01865860873

07002200000

Phone number Work phone

01865860873

Branch \* Negotiator \*

Morgan & Co 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

Create & View



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.