

Adding or Updating Warning Messages



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Navigate to the record to which you need to add a warning. This example shows a Landlord page but the process is the same on all other records.

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Richard Burton

a@c.soc

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PROSPECT

Warning

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5 The Rise, Ponteland, Newcastle upon Tyne

Reference:

Negotiator: Tim Bunce

Branch: VTUK

Status: Active

Personal Information

Title

Forename Richard

Surname Burton

Company Name

Website

Phone Number

Work phone

Mobile phone

Email Address a@c.soc

Salutation

Agreement Name

Source

Financial Information

Overseas

Tax Enabled

Exclude From Payments

Registration No

CNR No

CNR Approval Date 25/09/2025

Tax Rate 0.00

VAT Registration No

HMRC Due Date 25/09/2025

Statement No Statement

Send Statement Via Email

1

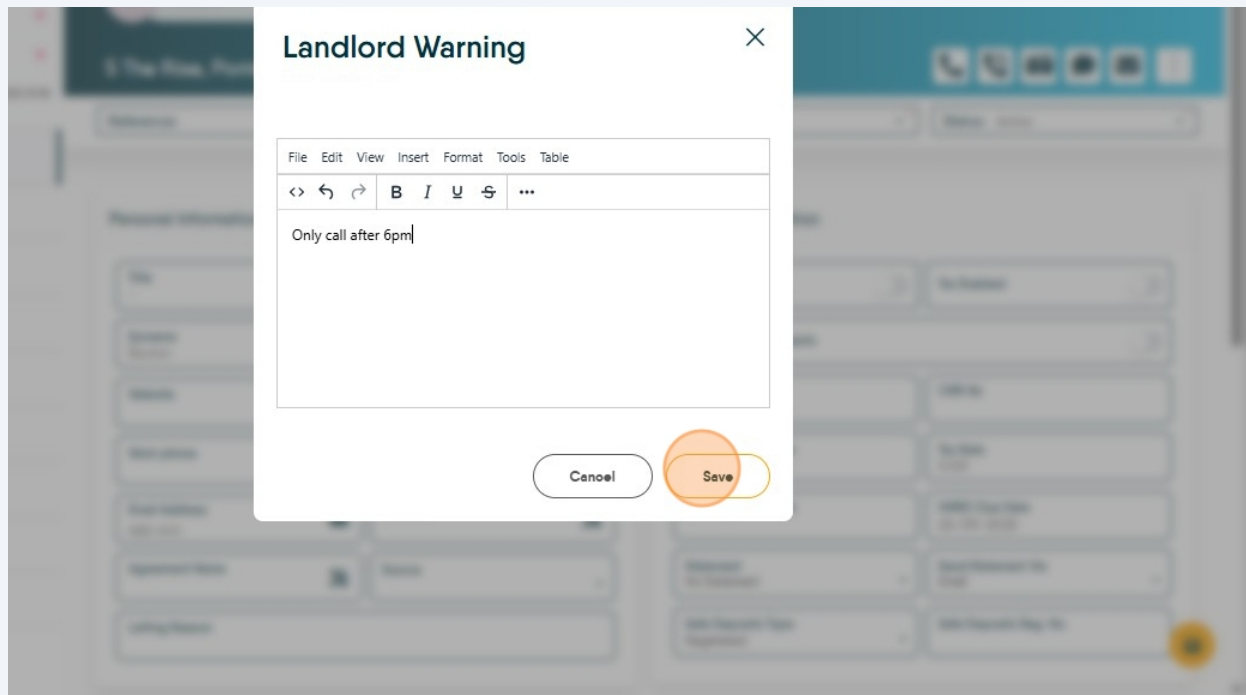
2 Click "Warning"

The screenshot shows a CRM interface with a top navigation bar containing 'iamproperty', 'CRM', 'movebutler', and 'iamsold'. Below this is a secondary navigation bar with 'My day', 'Lettings', 'Sales', 'Accounts', 'Reporting', and 'Communications'. The main header area displays the contact's name 'Richard Burton' with a profile picture, a status 'PROSPECT', and a 'Warning' button circled in red. The address '5 The Rise, Ponteland, Newcastle upon Tyne' is shown. Below the header is a form with fields for 'Reference:', 'Negotiator: Tim Bunce', 'Branch: VTUK', and 'Status: Active'. The main content area is divided into 'Personal Information' and 'Financial Information' sections, each with various input fields and toggle switches.

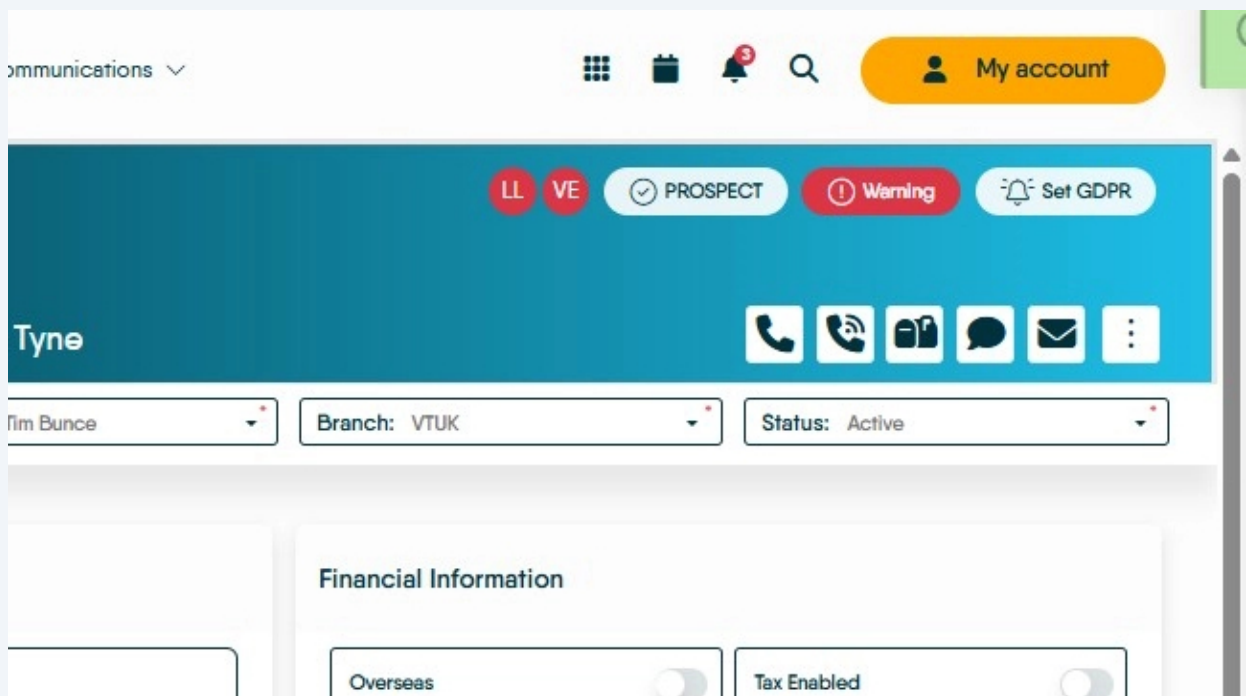
3 Add the required warning. If you are pasting from elsewhere, make sure to paste as plain text.

The screenshot shows a 'Landlord Warning' dialog box. The title bar has a close button (X). Below the title bar is a menu bar with 'File', 'Edit', 'View', 'Insert', 'Format', 'Tools', and 'Table'. Below the menu bar is a toolbar with icons for undo, redo, bold, italic, underline, and a list icon. The main text area contains the text 'Only call after 6pm'. At the bottom of the dialog are two buttons: 'Cancel' and 'Save'.

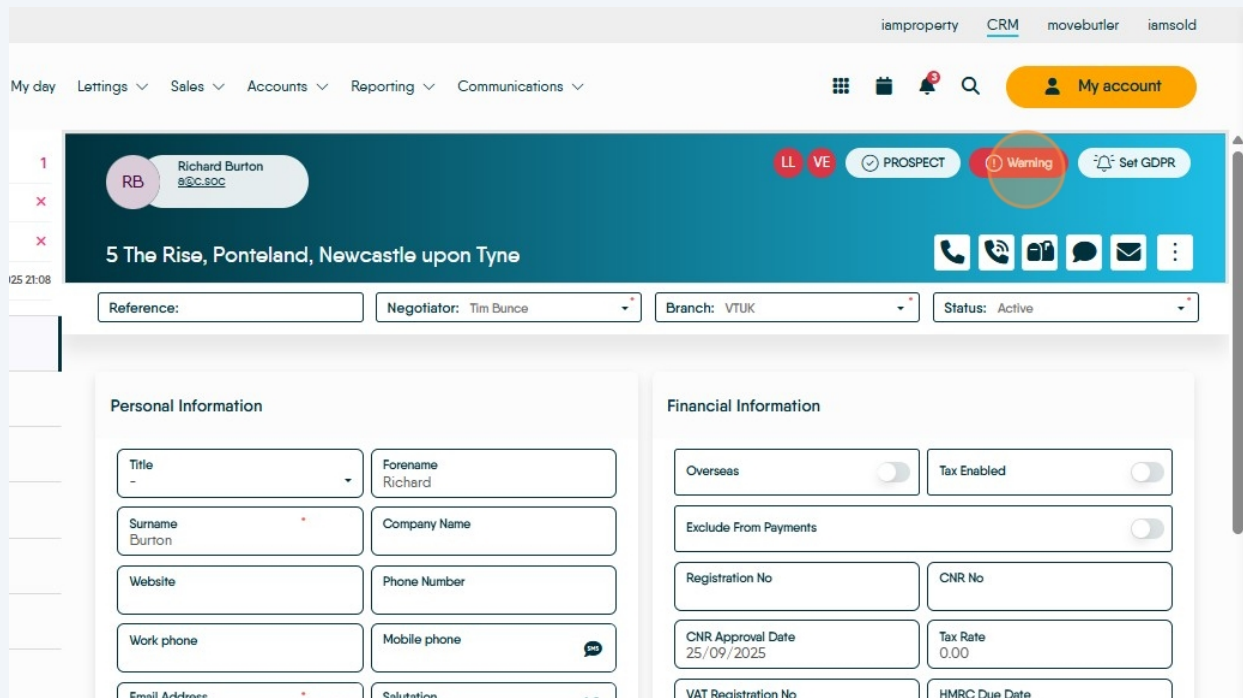
4 Click "Save"



5 The button will then display in red to show a warning is active.

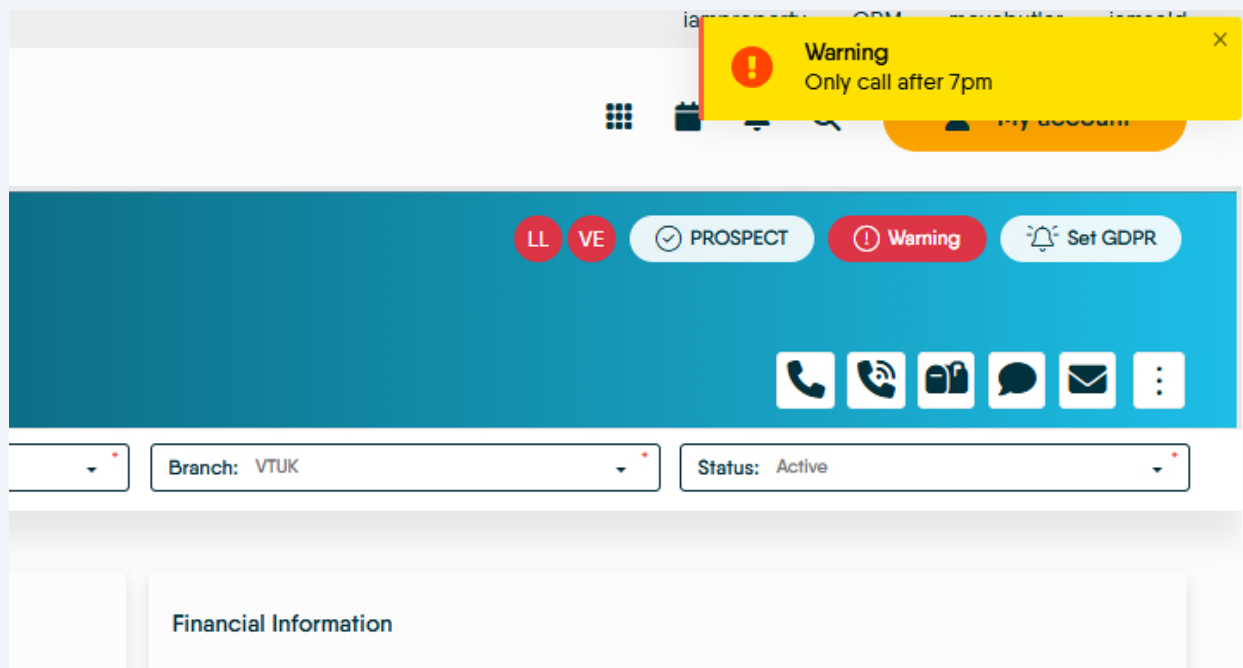


- 6 To edit the warning, click the button as before, make your changes, and save.



The screenshot shows the CRM interface for a contact named Richard Burton. The top navigation bar includes links for iamproperty, CRM, movebutler, and iamsold. Below this is a menu with options like My day, Lettings, Sales, Accounts, Reporting, and Communications. The contact's profile card displays the name Richard Burton, email address, and address: 5 The Rise, Ponteland, Newcastle upon Tyne. A red 'Warning' button is highlighted with a green circle. Below the profile card are fields for Reference, Negotiator (Tim Bunce), Branch (VTUK), and Status (Active). The main content area is divided into Personal Information and Financial Information sections. The Personal Information section includes fields for Title, Forename (Richard), Surname (Burton), Company Name, Website, Phone Number, Work phone, Mobile phone, Email Address, and Salutation. The Financial Information section includes fields for Overseas, Tax Enabled, Exclude From Payments, Registration No, CNR No, CNR Approval Date (25/09/2025), Tax Rate (0.00), VAT Registration No, and HMRC Due Date.

- 7 The next time the record is accessed, the warning will display in the top-right of the page.



The screenshot shows the CRM interface with a yellow warning message displayed in the top-right corner. The message reads: "Warning Only call after 7pm". The warning button is now red and displays the word "Warning". The rest of the interface is the same as in the previous screenshot, showing the contact's profile card and the Personal Information and Financial Information sections.