

Updating Applicant 'Buyer Position' Details in CRM



This guide provides a step-by-step process for updating applicant details in the CRM, specifically for the 'Buyer Position.'

It streamlines the workflow for managing applicant information, ensuring accuracy and efficiency in your sales operations. By following these instructions, users can easily navigate the CRM and make necessary updates, enhancing their ability to serve clients effectively. This resource is essential for anyone involved in property sales and applicant management.

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

The screenshot shows the CRM MyDay dashboard. At the top, there is a navigation bar with the iam property logo, menu items (My day, Lettings, Sales, Accounts, Reporting, Communications), and utility icons (grid, calendar, notifications, search). A 'My account' button is on the right. Below the navigation bar, a large heading reads 'Welcome back, Training'. Underneath, there are three buttons: '+ Add New Record', 'View property management', and 'Visit help centre'. A search bar is present with the placeholder text 'Search all records'. The main content area is divided into two panels: 'Today's events' and 'My tasks'. The 'Today's events' panel lists three events: 'Client Call' at 10:00, 'Test test' at 12:00, and 'Viewing - 1 Yew Tree Close, Hurworth, Darlington, Durham, DL2 2HX' at 15:30. The 'My tasks' panel displays a table of tasks.

Status	Name	Priority	Start date	Due date
Not Started	test	High	19/Jun/2025	19/Jun/2025
Not Started	goodfellows task	High	01/Jul/2025	01/Jul/2025
Not Started	Onboarding	High	03/Sept/2025	03/Sept/2025
Not Started	Check	High	24/Sept/2025	24/Sept/2025

2 If you know the name of the Applicant, use the search option to search for and find the record, jump to [here](#) to continue. If you want to search all applicants follow the instructions below.

3 Click "Sales"

The screenshot shows the iamproperty CRM dashboard. The top navigation bar includes 'My day', 'Lettings', 'Sales' (highlighted with an orange circle), 'Accounts', 'Reporting', and 'Communications'. The main header says 'Welcome back, Training'. Below this are three buttons: '+ Add New Record', 'View property management', and 'Visit help centre'. A search bar is present with the text 'Search all records'. The dashboard is divided into two main sections: 'Today's events' and 'My tasks'.

Time	Name
10:00	Client Call
12:00	Test test
15:30	Viewing - 1 Yew Tree Close, Hurworth, Darlington, Durham, DL2 2HX

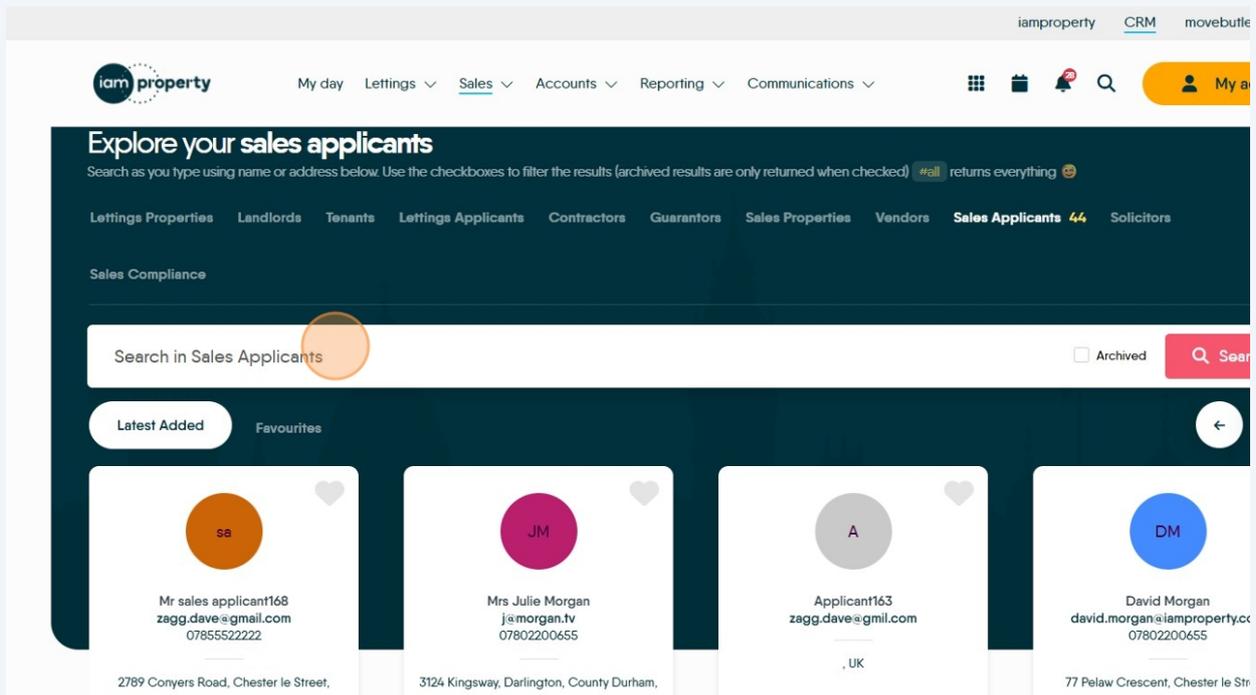
Status	Name	Priority	Start date	Due date
Not Started	test	High	19/Jun/2025	19/Jun/2025
Not Started	goodfellows task	High	01/Jul/2025	01/Jul/2025
Not Started	Onboarding	High	03/Sept/2025	03/Sept/2025

4 Click "Applicants"

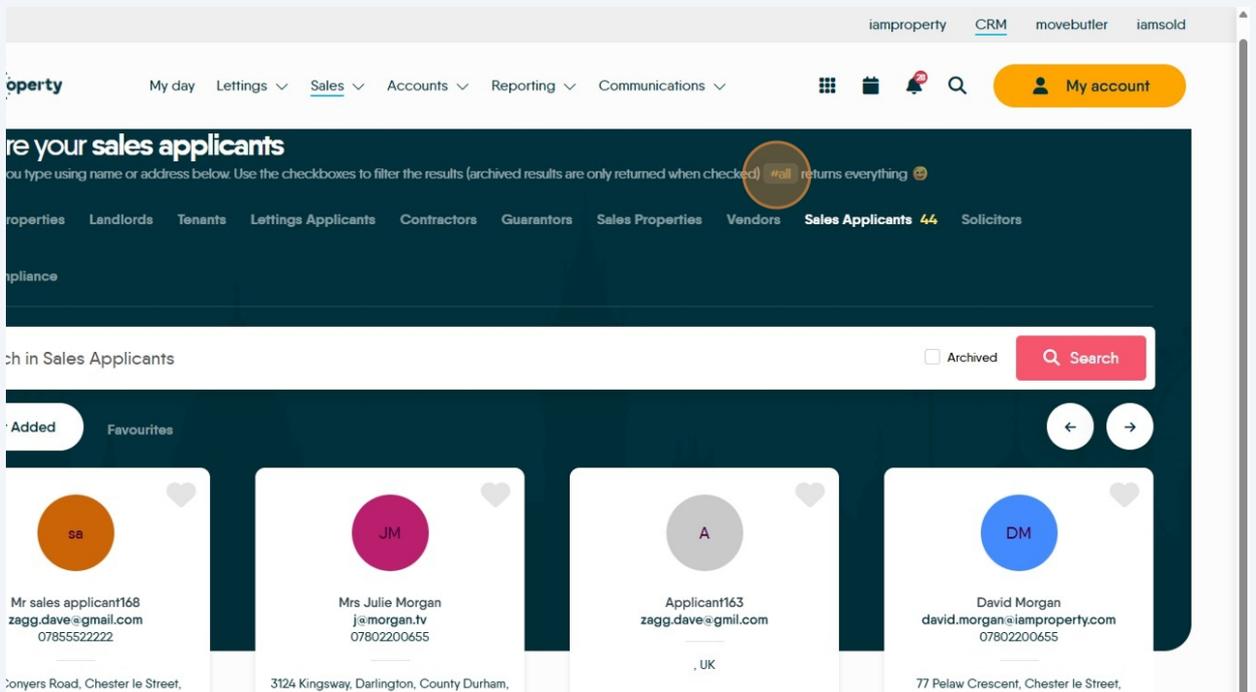
The screenshot shows the 'Sales' dashboard. The top navigation bar includes 'Sales Dashboard', 'Properties', 'Vendors', 'Applicants' (highlighted with an orange circle), 'Solicitors', 'Property Match', 'Applicant Match', 'Reports', 'Marketing toolkit', 'Sales Progression', 'Upload to portals', 'Sales Compliances', and 'E-sign'. The 'Marketing toolkit' item has a 'New' button next to it. Below the dashboard is a table of tasks.

Status	Name	Priority	Start date	Due date
Not Started	goodfellows test	High	01/Jul/2025	01/Jul/2025
Not Started	Onboarding	High	03/Sept/2025	03/Sept/2025
Not Started	Check	High	24/Sept/2025	24/Sept/2025
Not Started	Contact Vendor re Survey	High	26/Sept/2025	26/Sept/2025

5 Click the "Search in Sales Applicants" field.



6 Click "#all" to show all records.



7 Click here to select the "list view".

My day Lettings Sales Accounts Reporting Communications My account

Filter your sales applicants

Search by name or address below. Use the checkboxes to filter the results (archived results are only returned when checked) #all returns everything

Properties Landlords Tenants Lettings Applicants Contractors Guarantors Sales Properties Vendors **Sales Applicants 44** Solicitors

returns 44 applicants

Archived Search

sa
Mr sales applicant168
zagg.dave@gmail.com
07855522222
9 Conyers Road, Chester le Street,
County Durham, DH2 2HD, UK

JM
Mrs Julie Morgan
j@morgan.tv
07802200655
3124 Kingsway, Darlington, County
Durham, DL1 3EY, UK

A
Applicant163
zagg.dave@gmail.com
, UK

DM
David Morgan
david.morgan@iamproperty.com
07802200655
77 Pelaw Crescent, Chester le Street,
County Durham, DH2 2HX, UK

8 To export this list, click the "Export to CSV" option

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My day Lettings Sales Accounts Reporting Communications My account

returns 44 applicants

Applicant Name	Address	Max Budget	Min Bedroom
Mr sales applicant168	2789 Conyers Road, Chester le Street, County Durham, DH2 2HD, UK	0	0
Mrs Julie Morgan	3124 Kingsway, Darlington, County Durham, DL1 3EY, UK	0	0
Applicant163	, UK	150,000	3
David Morgan	77 Pelaw Crescent, Chester le Street, County Durham, DH2 2HX, UK	0	0
Mr David Morgan	, UK	0	0
Mr james smith	, UK	0	0
Dionne Davenport	, UK	0	0
Mr David Morgan	158 Yew Tree Close, Hurworth, Darlington, Durham, DL22HX, UK	0	0
Mr David Morgan	198 Yew Tree Close, Hurworth, Darlington, Durham, DL2 2HX, UK	0	0
Mr David 47 Andrews	12 Oakes Lane, Brockholes, Holmfirth, West Yorkshire, HD9 7AR, UK	0	0
Mr sales applicant165	77 Pelaw Crescent, Chester le Street, County Durham, DH2 2HX, UK	500,000	0

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Scroll across the screen. Click "**Buyer Position**" this will show all the currently set Buyer Positions in one screen. To export click the export icon.

The screenshot shows a CRM interface with a table of Buyer Positions. The 'Buyer Position' column is highlighted with a red circle. The table has columns for 'Phone', 'Mobile', 'Email', 'Buyer Position', 'Branch', and 'Date Added'.

Phone	Mobile	Email	Buyer Position	Branch	Date Added
'855522222	07855522222	zagg.dave@gmail.com	Not Specified	Morgan & Co	24/10/2025
'802200655	07802200655	j@morgan.tv	Cash Buyer	Morgan & Co	01/10/2025
		zagg.dave@gmail.com	Not Specified	Morgan & Co	01/10/2025
865860873	07802200655	david.morgan@iamproperty.com	Not Specified	Morgan & Co	12/09/2025
865860871	078022200655	crm.training@iamproperty.com	Not Specified	Morgan & Co	11/09/2025
	07970891019	brian.mason@gmail.com	Not Specified	Morgan & Co	29/08/2025
		david.morgan@iamproperty.com	Not Specified	Morgan & Co	23/07/2025
	0711123456	david.morgan@iamproperty.com	Not Specified	Morgan & Co	27/05/2025
	0771123456	david.morgan@iamproperty.com	Not Specified	Morgan & Co	27/05/2025
'777777777	0777777777	dgewsad@jksme.co.uk	Not Specified	Morgan & Co	25/04/2025
'8522364	074525522	zagg.dave@gmail.com	Not Specified	Morgan & Co	07/03/2025

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To Update the "**Buyer Position**"

11 Click "View Applicant"

Explore your sales applicants
Search as you type using name or address below. Use the checkboxes to filter the results (archived results are only returned when checked) #all returns everything 😊

Lettings Properties Landlords Tenants Lettings Applicants Contractors Guarantors Sales Properties Vendors **Sales Applicants 44** Solicitors

Sales Compliance

#all Archived

'#all' returns 44 applicants

- Mr sales applicant168
zaggdave@gmail.com
07855522222
2789 Conyers Road, Chester le Street,
County Durham, DH2 2HD, UK
[View Applicant](#)
- Mrs Julie Morgan**
j@morgan.tv
07802200655
3124 Kingsway, Darlington, County
Durham, DL1 3EY, UK
[View Applicant](#)
- Applicant163
zaggdave@gmail.com
. UK
[View Applicant](#)
- David Morgan
david.morgan@iamproperty.com
07802200655
77 Pelaw Crescent, Chester le Street
County Durham, DH2 2HX, UK
[View Applicant](#)

12 In the applicant screen, scroll down the screen.

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My day Lettings Sales Accounts Reporting Communications My account

97 New Tree Close, Hurworth, Darlington, Durham, DL2 2HX

Accepted

3 01/10/2025

Mrs Julie Morgan
j@morgan.tv
07802200655

Warning Set GDPR

3124 Kingsway, Darlington, County Durham

Reference: Negotiator: Training Dave Branch: Morgan & Co Status: Active

Personal Information

Title: Mrs	Forename: Julie	Surname: Morgan	Company Name
Website	Phone Number: 07802200655	Work phone	Mobile phone: 07802200655
Email Address: j@morgan.tv	Salutation	Source	Temperature: Hot

Applicant Address [Edit Manually](#)

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Select the **"Buyer Position"** option and from the drop down menu select the appropriate option.

The screenshot shows a property search interface. On the left, there is a sidebar with a search bar containing '97 New Tree Close, Hurworth, Darlington, Durham, DL2 2HX', a green 'Accepted' status, a checkmark, an orange 'H' icon, and the date '3 01/10/2025'. The main form area is titled 'Applicant Criteria' and includes several sections: a search bar for 'Search for Area...' with a 'Miles' dropdown set to '1/4 Mile' and an 'Add Area' button; price filters for 'Min Price' and 'Max Price' both set to '£ 0.00'; 'Move In Date' set to '01/10/2025'; 'Minimum Bedrooms' and 'Minimum Bathrooms' both set to '0'; 'Property Attributes' with toggle switches for 'Single Garage', 'Parking', and 'Garden'; and 'Property Type' with a search bar and toggle switches for 'Apartment', 'Bar/Nightclub', 'Barn', and 'Barn Conversion'. The 'Buyer Position' dropdown menu is open, showing 'Cash Buyer' as the selected option, and is highlighted with an orange circle. A 'Save Changes' button with a lock icon is visible in the bottom right corner of the form.

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Click here to **"Save"**

This screenshot is identical to the one above, showing the same property search interface. The 'Buyer Position' dropdown menu is still open and highlighted with an orange circle. In this version, the 'Save Changes' button with a lock icon in the bottom right corner of the form is also highlighted with an orange circle, indicating the next step in the process.