

Adding Property Details to a Landlord Record



This guide provides a straightforward process for adding property details to an existing landlord record, ensuring that you can efficiently manage landlords and their listings.

By following the steps outlined, users can easily navigate the system and update essential information, enhancing their property management experience. Whether you're a seasoned agent or new to the platform, this guide simplifies the task, saving time and reducing errors.

1 Navigate to Landlord record you are adding the property to.

The screenshot displays the 'iam property' interface. At the top, there is a navigation bar with 'My day', 'Lettings', 'Sales', 'Accounts', 'Reporting', and 'Communications'. A user profile 'My account' is visible on the right. Below the navigation bar, a header section shows the landlord's name 'Lettings Landlord183', email 'zagg.dave@gmail.com', and phone '078552321254'. The address '4523 Yew Tree Close, Hurworth, Darlington' is displayed. Below the header, there are fields for 'Reference', 'Negotiator: Training Dave', 'Branch: Morgan & Co', and 'Status: Active'. The main form is divided into two columns: 'Personal Information' and 'Financial Information'. The 'Personal Information' section includes fields for Title, Forename (Lettings), Surname (Landlord183), Company Name, Website, Phone Number (0785145165), Work phone, Mobile phone (078552321254), Email Address (zagg.dave@gmail.com), Salutation, Agreement Name, and Source. The 'Financial Information' section includes toggle switches for 'Overseas' and 'Tax Enabled', a toggle for 'Exclude From Payments', and input fields for 'Registration No', 'CNR No', 'CNR Approval Date' (01/01/1900), 'Tax Rate' (0.00), 'VAT Registration No', 'HMRC Due Date' (01/01/1900), 'Statement' (No Statement), and 'Send Statement Via' (Email).

2 Click "Properties"

Properties 1

Identity Confirmed x

Address Confirmed x

Last Contacted

Details

Checklist

Properties

Tenancies

Contacts

Documents

Journal

E-Sign

Audit

Lettings Landord183
zagg.dave@gmail.com
078552321254

PROSPECT

Warning

4523 Yew Tree Close, Hurworth, Darlington

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

Personal Information

Title	Forename Lettings
Surname Landord183	Company Name
Website	Phone Number 0785145165
Work phone	Mobile phone 078552321254
Email Address zagg.dave@gmail.com	Salutation
Agreement Name	Source

Financial Information

Overseas	Tax Enabled
Exclude From Payments	
Registration No	CNR No
CNR Approval Date 01/01/1900	Tax Rate 0.00
VAT Registration No	HMRC Due Date 01/01/1900
Statement No Statement	Send Statement Via Email

3 Click "Add property"

iam property

My day Lettings Sales Accounts Reporting Communications

Properties 1

Identity Confirmed x

Address Confirmed x

Last Contacted

Details

Checklist

Properties

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Contacts

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Lettings Landord183
zagg.dave@gmail.com
078552321254

PROSPECT

Warning

4523 Yew Tree Close, Hurworth, Darlington

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

Add property

Sort Properties

Search

Clear filters

Property Style
Select Multiple Options

Minimum Bedrooms 02

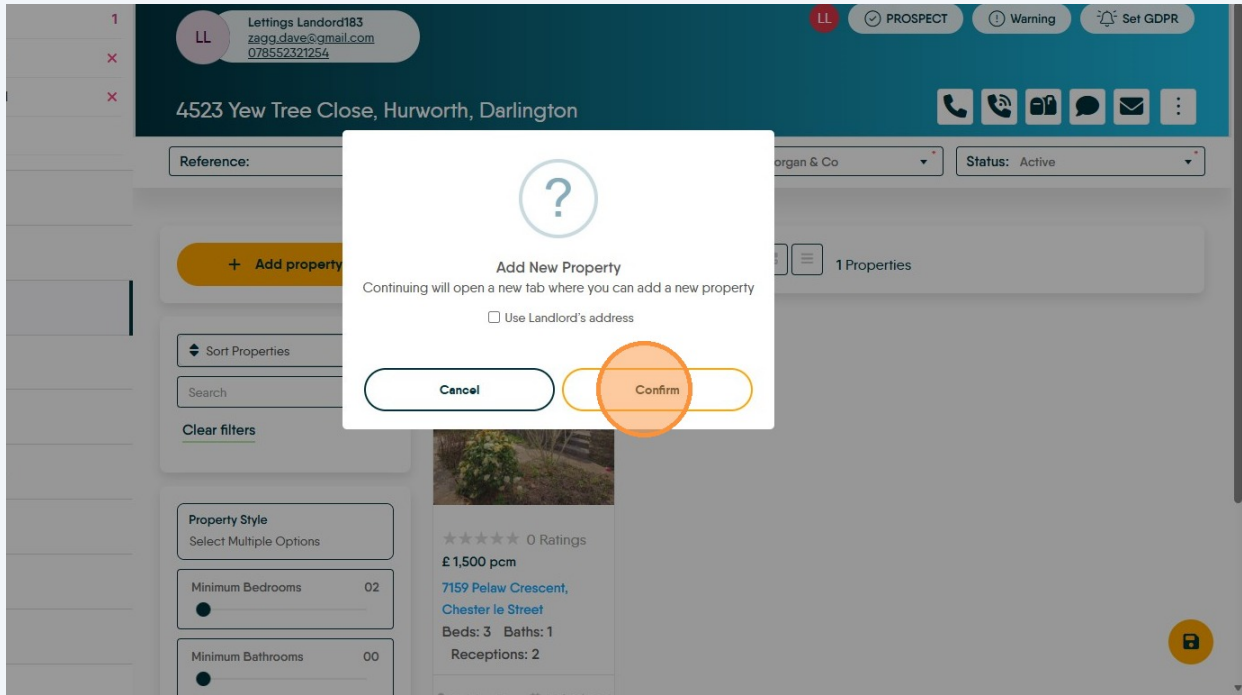
£1,500 pcm

1 Tenant

7159 Pelaw Crescent, Chester-le-Street

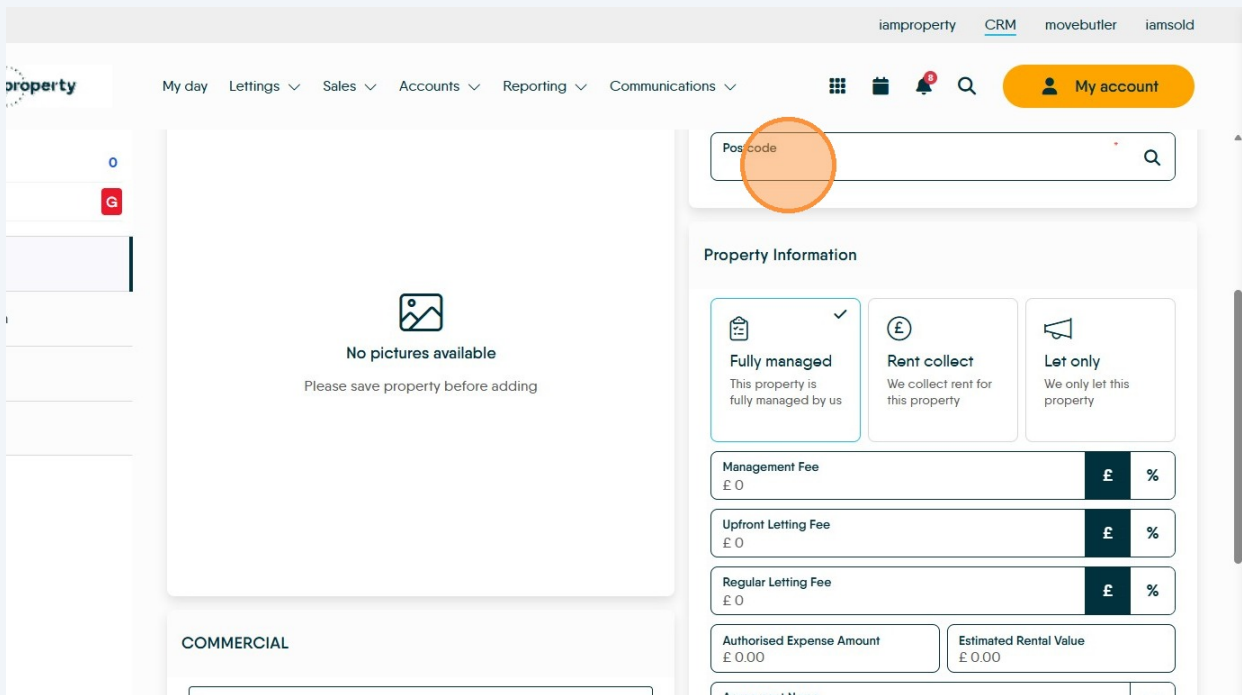
4

If the Landlord is renting the property (or rooms in) the one they live, click the 'Use Landlords address' option. Click **"Confirm"**

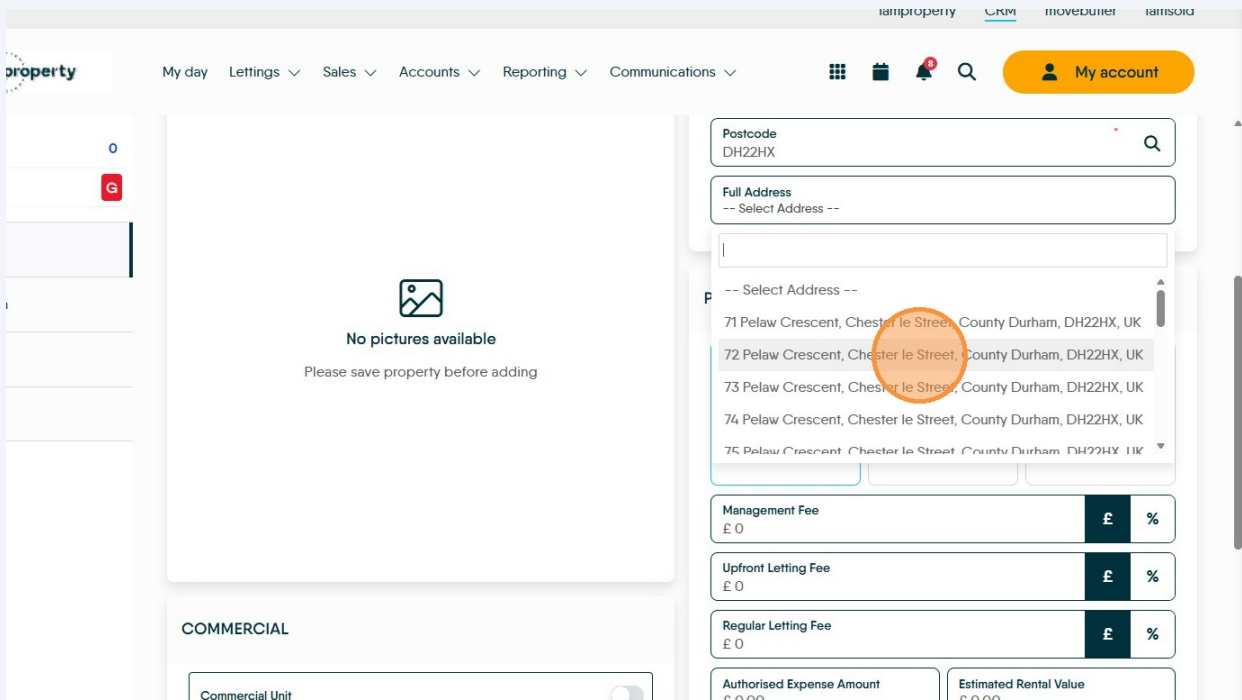


5

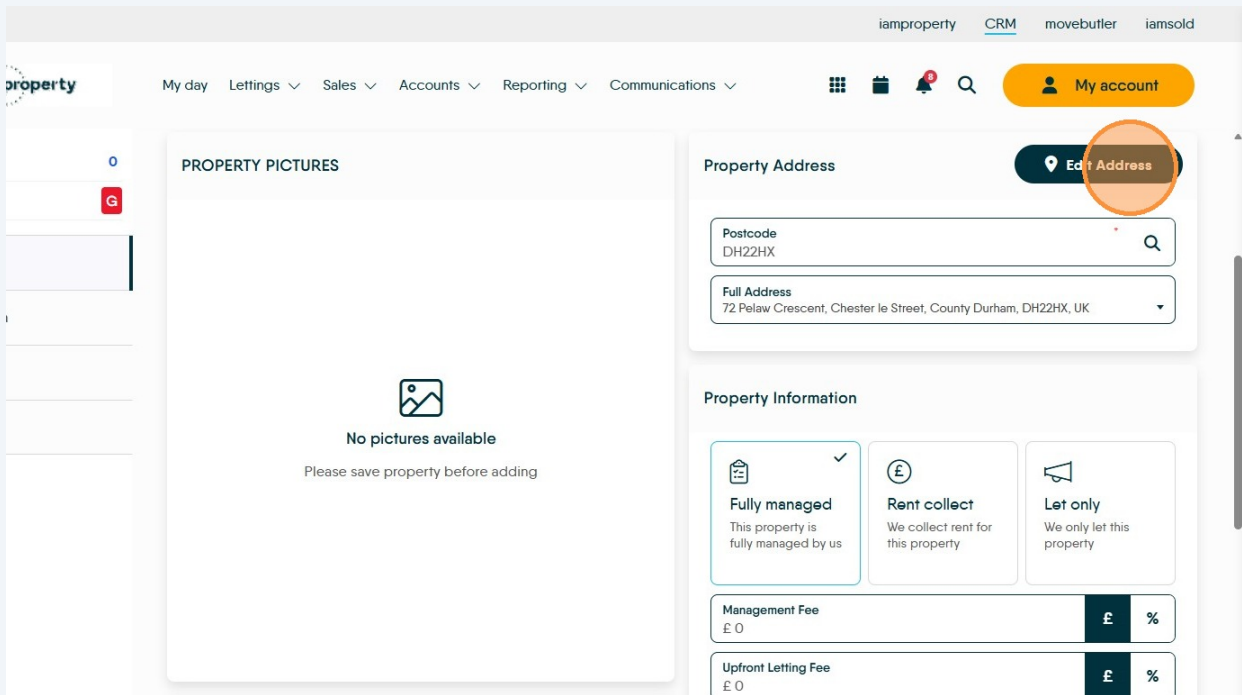
This will take you to the new property screen. Click the **"Postcode"** field.



6 Type the postcode and select from the drop down menu.



7 If you need to edit the address or if you need to add an address. Click "Edit Address"



8 Once the property details are added, click "Save"

PROPERTY PICTURES

No pictures available
Please save property before adding

Property Address [Edit Address](#)

Postcode: DH22HX

Full Address: 72 Pelaw Crescent, Chester le Street, County Durham, DH22HX, UK

House No: 7240 | Address Line 1: Pelaw Crescent | Address Line 2: |

Town: Chester le Street | County: County Durham | Country: UK

Latitude: 54.865362 | Longitude: -1.585946

Property Information

Fully managed
This property is fully managed by us

Rent collect
We collect rent for this property

Let only
We only let this property

Management Fee: £ 0

Save Changes

9 Then continue to add all of additional information, clicking save as you go so information isn't lost.

PROPERTY PICTURES

No pictures available
Please click the button to add

Start

COMMERCIAL

Commercial Unit

Exempt
Rent amount is exempt from VAT

Inclusive
Rent amount is inclusive of VAT

Exclusive
Rent amount is exclusive of VAT

Property Information

Postcode: DH2 2HX

Fully managed
This property is fully managed by us

Rent collect
We collect rent for this property

Let only
We only let this property

Management Fee: £ 0

Upfront Letting Fee: £ 0

Regular Letting Fee: £ 0

Authorised Expense Amount: £ 0.00 | Estimated Rental Value: £ 0.00

Agreement Name: Lettings Landord183

Scheduled Management Fee ⓘ

Save Changes