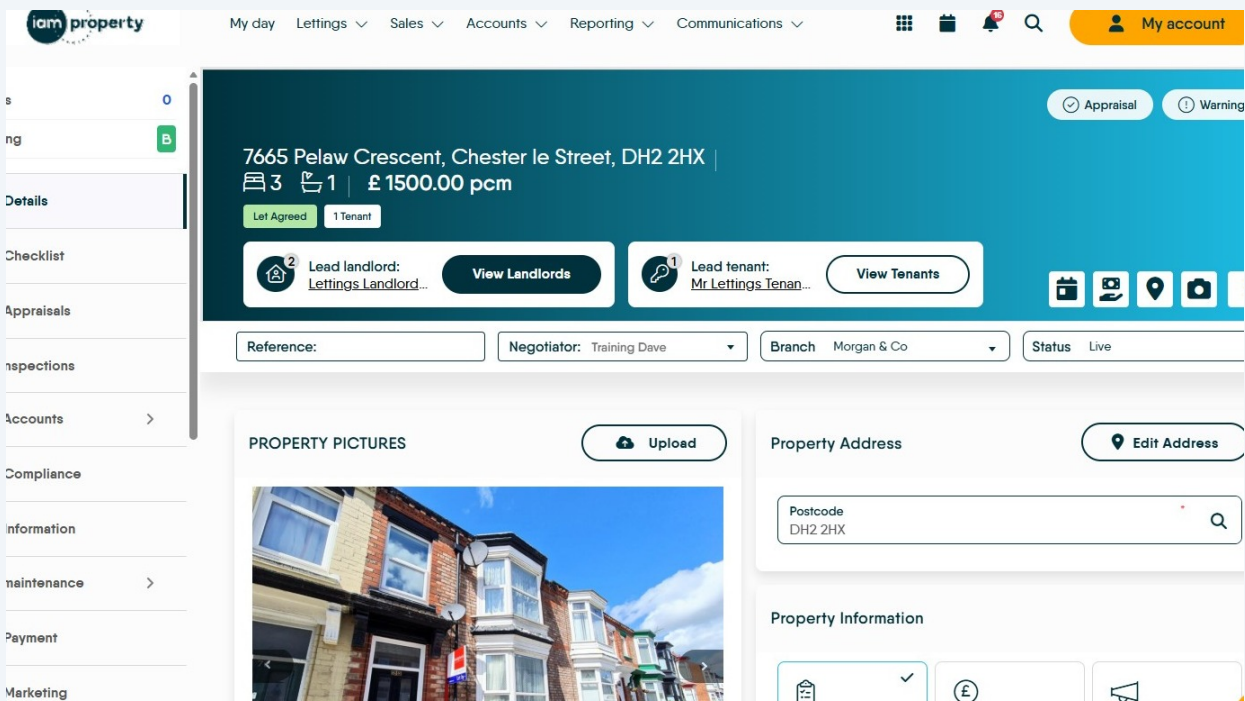


Add and Save New Landlord to an existing Property in CRM



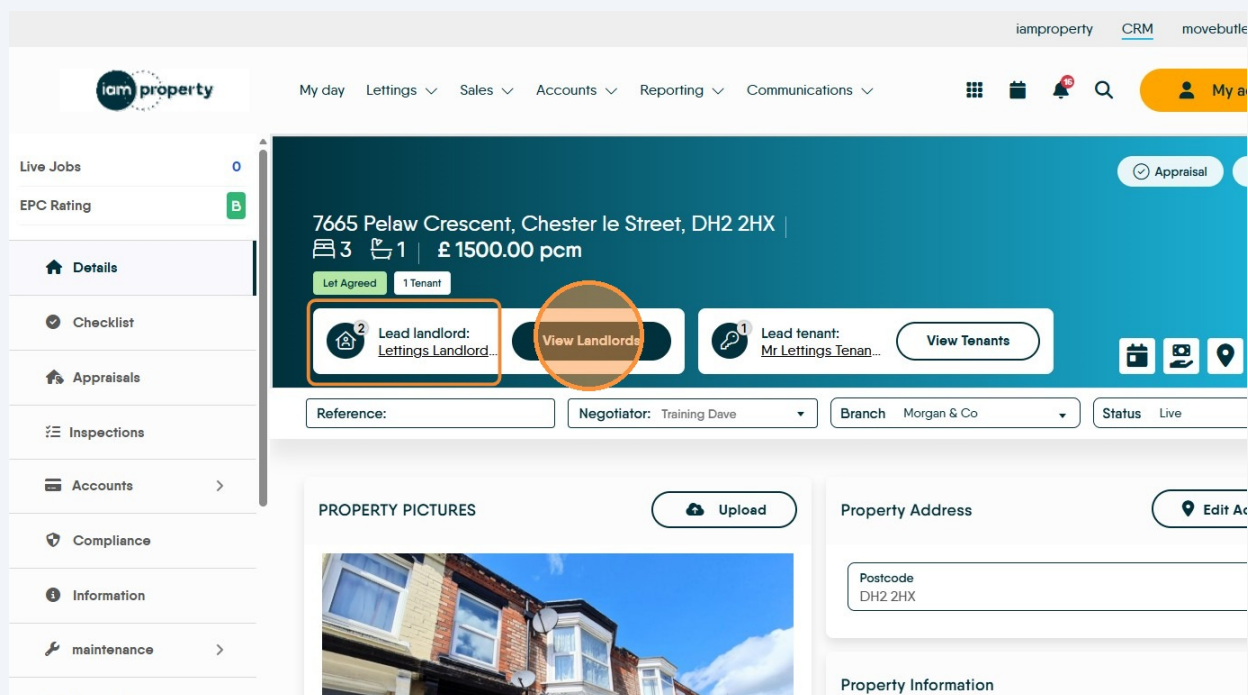
This guide walks you through the process of creating and saving a new landlord record within the property management CRM. It is useful for property managers who need to efficiently add landlord details and link them to a property for streamlined management and communication.

1 Navigate to the property you are adding the new landlord to.



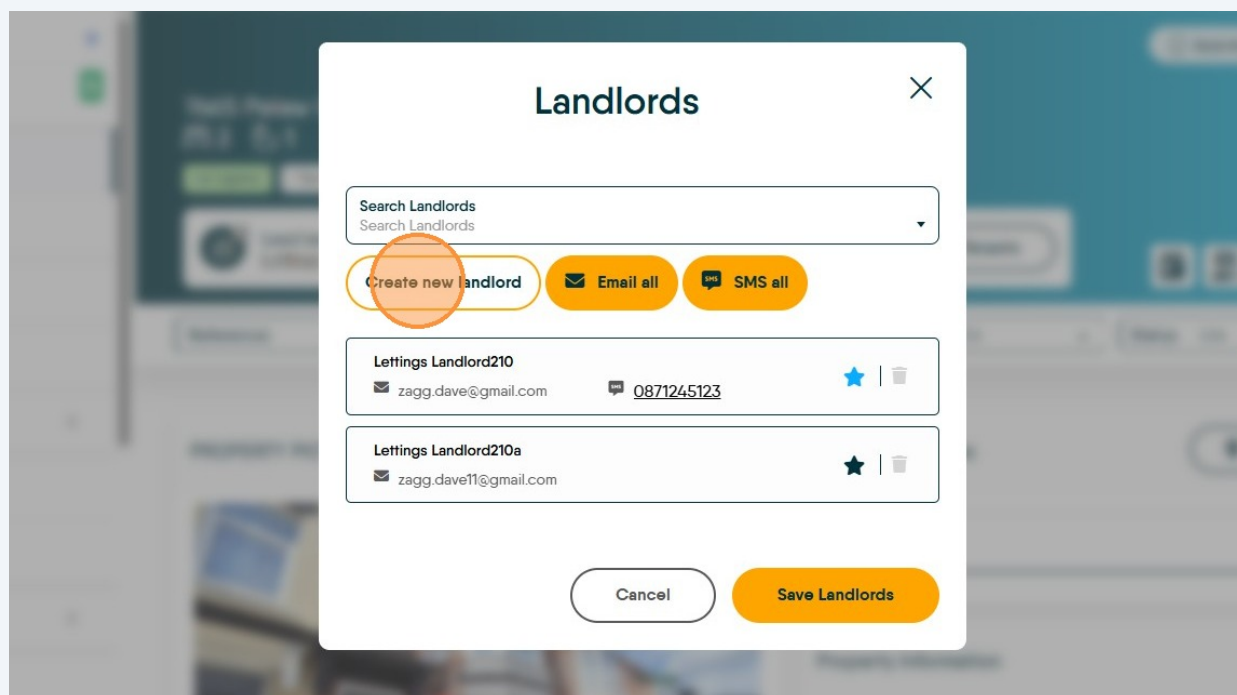
2

Click **"View landlords"** in the area highlighted by the box, you can see the Lead Landlord name and the number of current landlords.



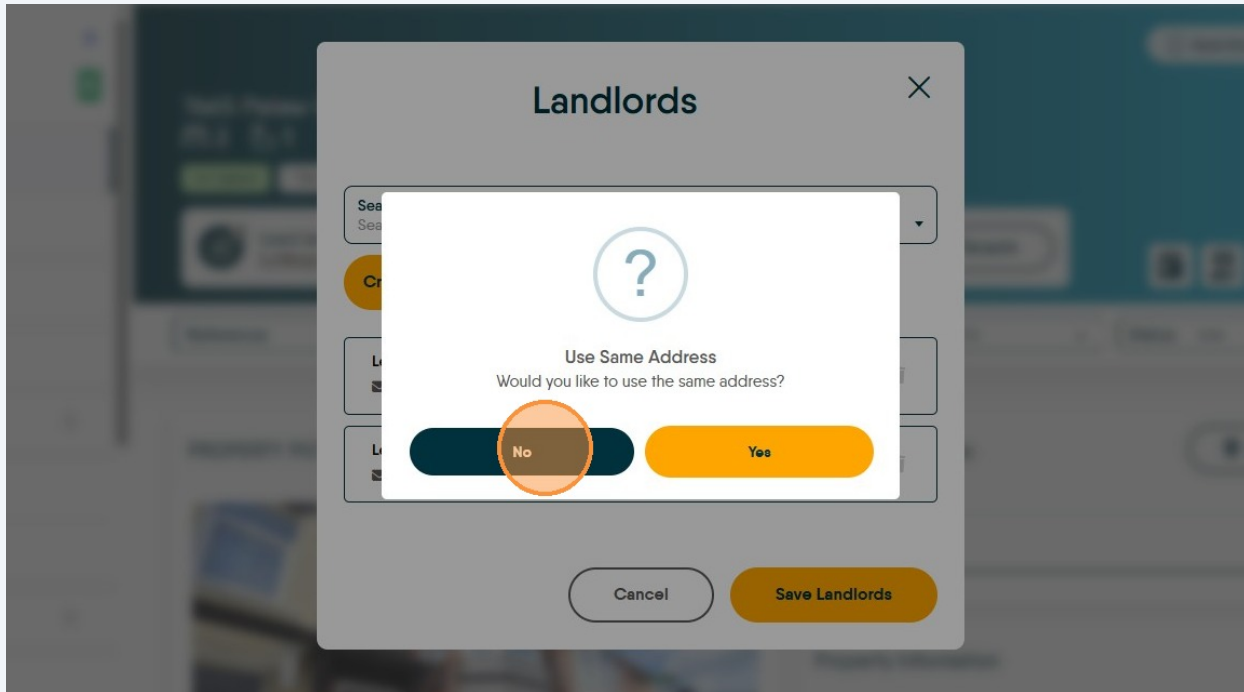
3

Click **"Create new landlord"** or click into the **"Search Landlords"** field and search for an existing Landlord.



4

Unless the Landlord lives at the same address as the property being rented. Click **"No"**



5

The minimum data that is required to be added to the record is Surname and Email Address, the more information you add the better.

6 Click the **"Surname"** field.

ed 01/01/0001 00:00

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

Personal Information Import

Title	Forename
Surname	Company Name
Website	Phone Number
Work phone	Mobile phone SMS
Email Address * ✉	Salutation ✕
Agreement Name ✕	Source
Letting Reason	

Financial Information

Overseas ☐	Tax Enable
Exclude From Payments	
Registration No	CNR No
CNR Approval Date 03/03/2026	Tax Rate 0
VAT Registration No	HMRC 03/03/2026
Statement No Statement	Send S Email
Safe Deposits Type	Safe D

7 Click the **"Email Address"** field.

01/01/0001 00:00

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

Personal Information Import

Title	Forename
Surname	Company Name
Website	Phone Number
Work phone	Mobile phone SMS
Email Address * ✉	Salutation ✕
Agreement Name ✕	Source
Letting Reason	

Financial Information

Overseas ☐	Tax Enable
Exclude From Payments	
Registration No	CNR No
CNR Approval Date 03/03/2026	Tax Rate 0
VAT Registration No	HMRC Du 03/03/2026
Statement No Statement	Send Stat Email
Safe Deposits Type	Safe Dep

8

It is good practice to add as much data as you have to any record that is being created.

9

Click the "**Forename**" field.

01/01/0001 00:00

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

Personal Information  Import

Title	Forename
Surname	Company Name
Website	Phone Number
Work phone	Mobile phone
Email Address	Salutation
Agreement Name	Source
Letting Reason	

Financial Information

Overseas	Tax Enabled
Exclude From Payments	
Registration No	CNR No
CNR Approval Date 03/03/2026	Tax Rate 0
VAT Registration No	HMRC Due 03/03/2026
Statement No Statement	Send State Email
Safe Deposits Type	Safe Deposits

10 Click the **"Email Address"** field.

The screenshot shows a user profile form with a teal header. At the top, there are fields for 'Reference:', 'Negotiator: Training Dave', 'Branch: Morgan & Co', and 'Status'. Below this, the form is divided into two main sections: 'Personal Information' and 'Financial Information'. In the 'Personal Information' section, the 'Email Address' field is highlighted with an orange circle. Other fields in this section include Title, Forename (Lettings), Surname (Landlord213), Company Name, Website, Phone Number, Work phone, Mobile phone, Salutation, Agreement Name, and Source. The 'Financial Information' section includes fields for Overseas, Tax Enab, Exclude From Payments, Registration No, CNR No, CNR Approval Date (03/03/2026), Tax Rate (0), VAT Registration No, HMRC D (03/03/), Statement (No Statement), Send Sta Email, Safe Deposits Type, and Safe Dep.

11 If the email address has been used before, either select the existing user from the list or if you are using the same email for both Landlords click **'Continue with New Record'**

The screenshot shows a 'Possible Duplicate Records' dialog box. It contains a list of records with the same email address, each with a 'Use/Merge' button. The records are: AC Lettings Applicant [Tenant], Lettings Applicant [Sales Applicant,Tenant], Lettings Applicant [Tenant], lettings applicant [Tenant], Test Applicant [Lettings Applicant,Tenant], and applicant 79 [Lettings Applicant,Tenant]. At the bottom of the dialog, there is a button labeled 'Continue with new record', which is highlighted with an orange circle.

12

Click here to create a **'Salutation'** this is the last name and the title combined. If you have a Mr & Mrs record, you could use Mr & Mrs in the title for the lead Landlord to create the correct Salutation. n.b. you should still add 2 landlord records one for Mr and the other for Mrs.

The screenshot shows the 'Personal Information' section of a form. A callout box labeled 'Build Salutation' points to the 'Salutation' field, which currently contains 'Landlord213'. The 'Email Address' field contains 'zagq.dave@gmail.com'. The 'Financial Information' section is also visible on the right.

Personal Information		Financial Information	
Title	Forename Lettings	Overseas	Tax Enabled
Surname Landlord213	Company Name	Exclude From Payments	
Website	Phone Number	Registration No	CNR No
Work phone	Mobile phone	CNR Approval Date 03/03/2026	Tax Rate 0
Email Address zagq.dave@gmail.com	Salutation Landlord213	VAT Registration No	HMRC Due Date 03/03/2026
Agreement Name	Source	Statement No Statement	Send Statement Via Email
Letting Reason		Safe Deposits Type	Safe Deposits Reg. No.

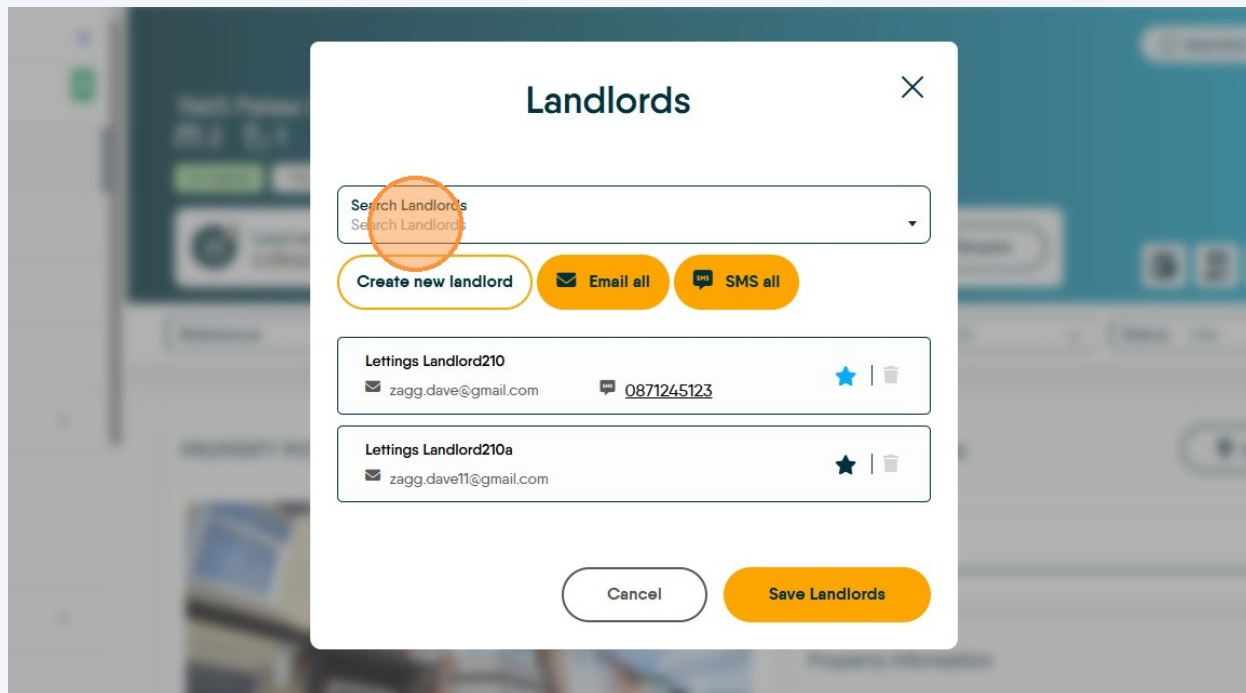
13

Click here to **"Save"**

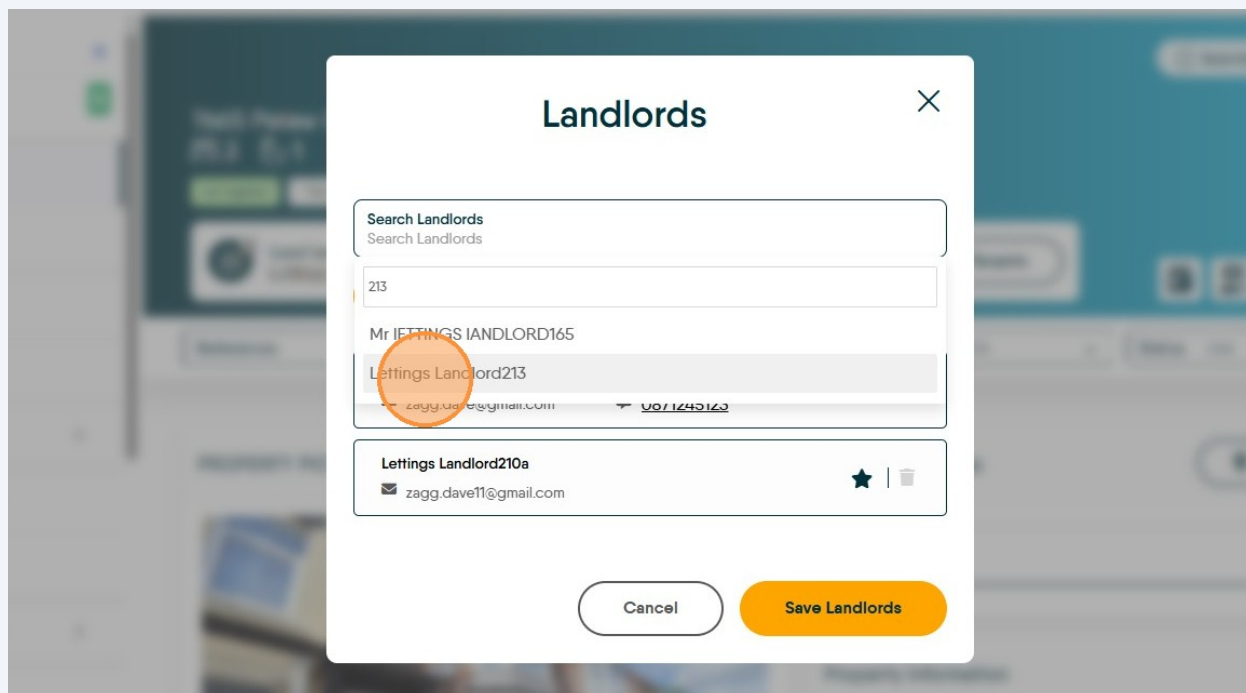
The screenshot shows the same 'Personal Information' form as in the previous image. A callout box labeled 'Save Changes' points to the 'Save' button in the bottom right corner of the form. The 'Salutation' field now contains 'Landlord213'.

Personal Information		Financial Information	
Title	Forename Lettings	Overseas	Tax Enabled
Surname Landlord213	Company Name	Exclude From Payments	
Website	Phone Number	Registration No	CNR No
Work phone	Mobile phone	CNR Approval Date 03/03/2026	Tax Rate 0
Email Address zagq.dave@gmail.com	Salutation Landlord213	VAT Registration No	HMRC Due Date 03/03/2026
Agreement Name	Source	Statement No Statement	Send Statement Via Email
Letting Reason		Safe Deposits Type	Safe Deposits Reg. No.

- 14 Navigate back to the original property record and click **"Search Landlords"**

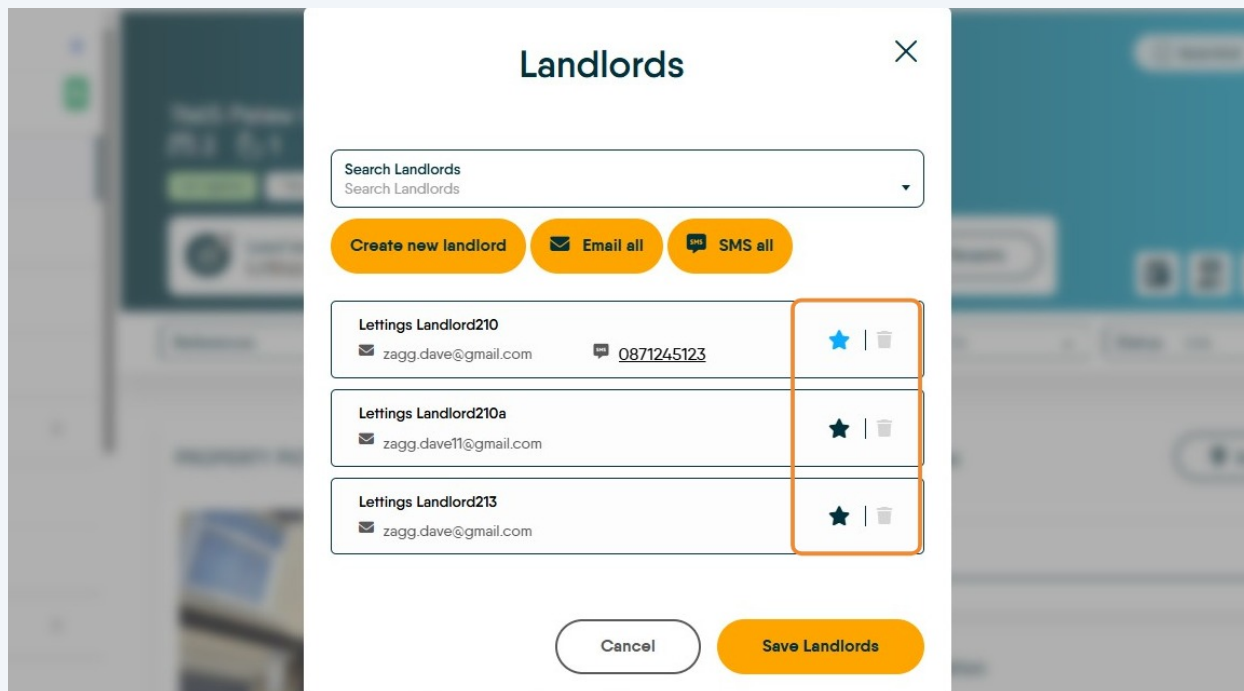


- 15 Search for and select your new landlord, in this case click "Lettings Landlord213"



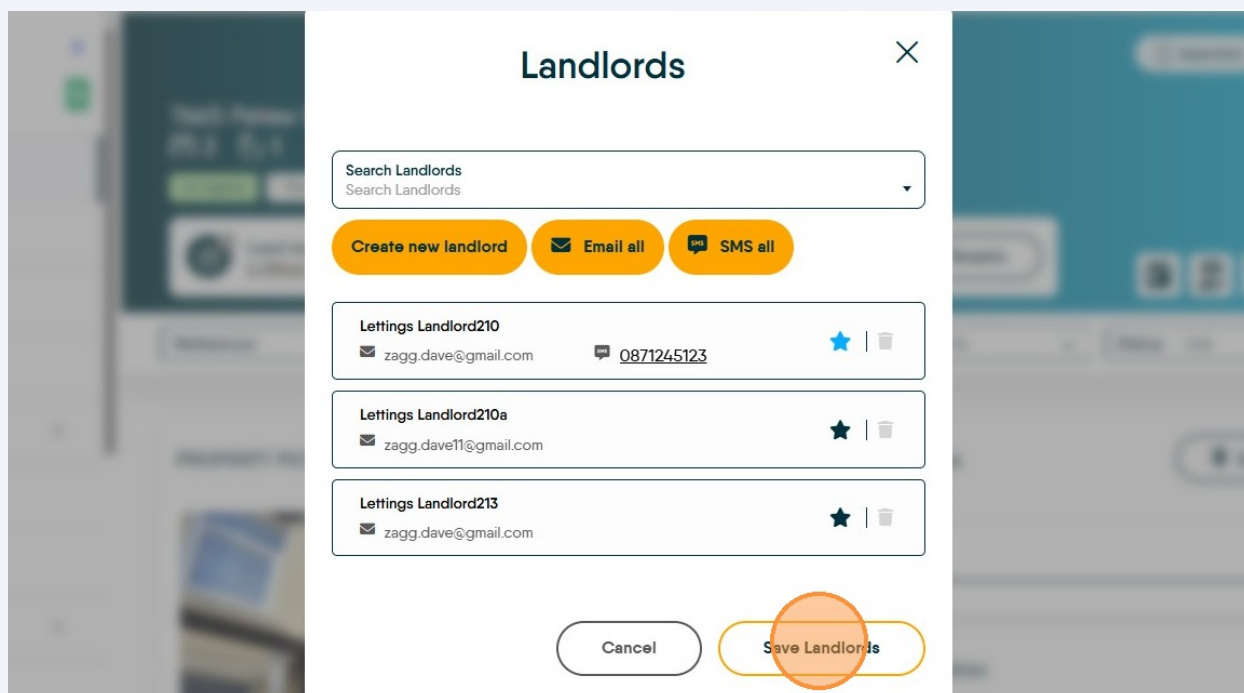
16

The new landlord will show in the list. The lead landlord is the one with the blue star, the change the lead landlord, just click on the star next to the person to be lead.



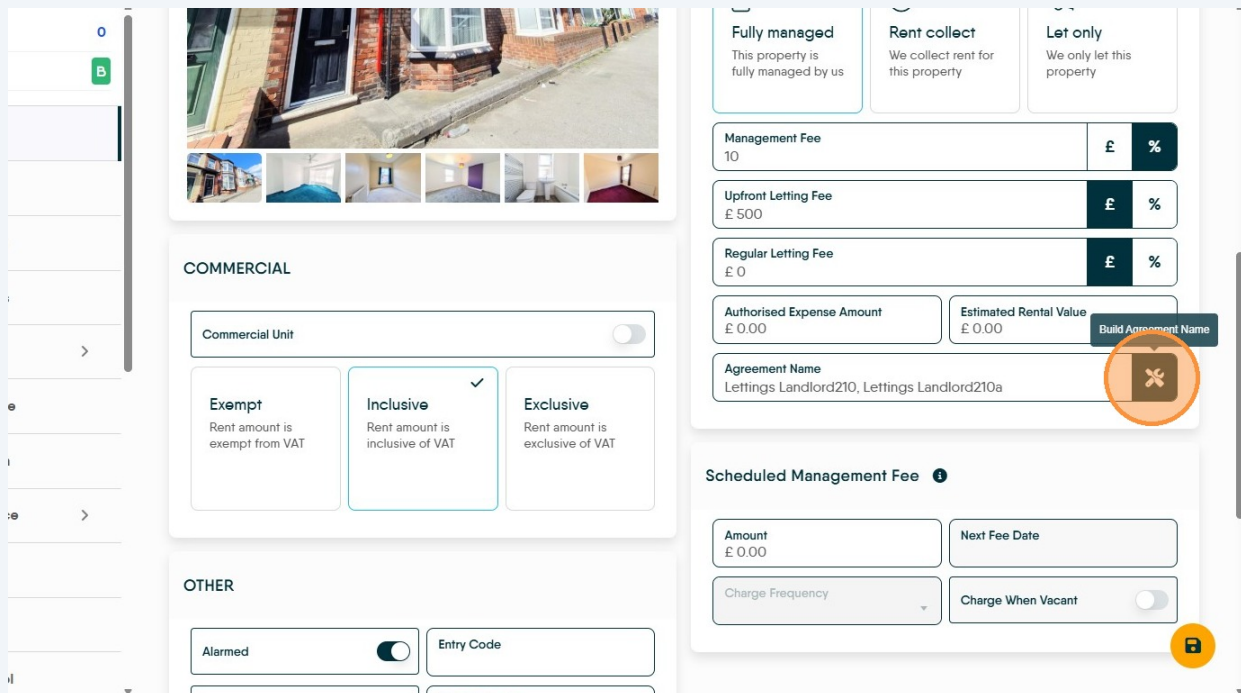
17

Click **"Save Landlords"**

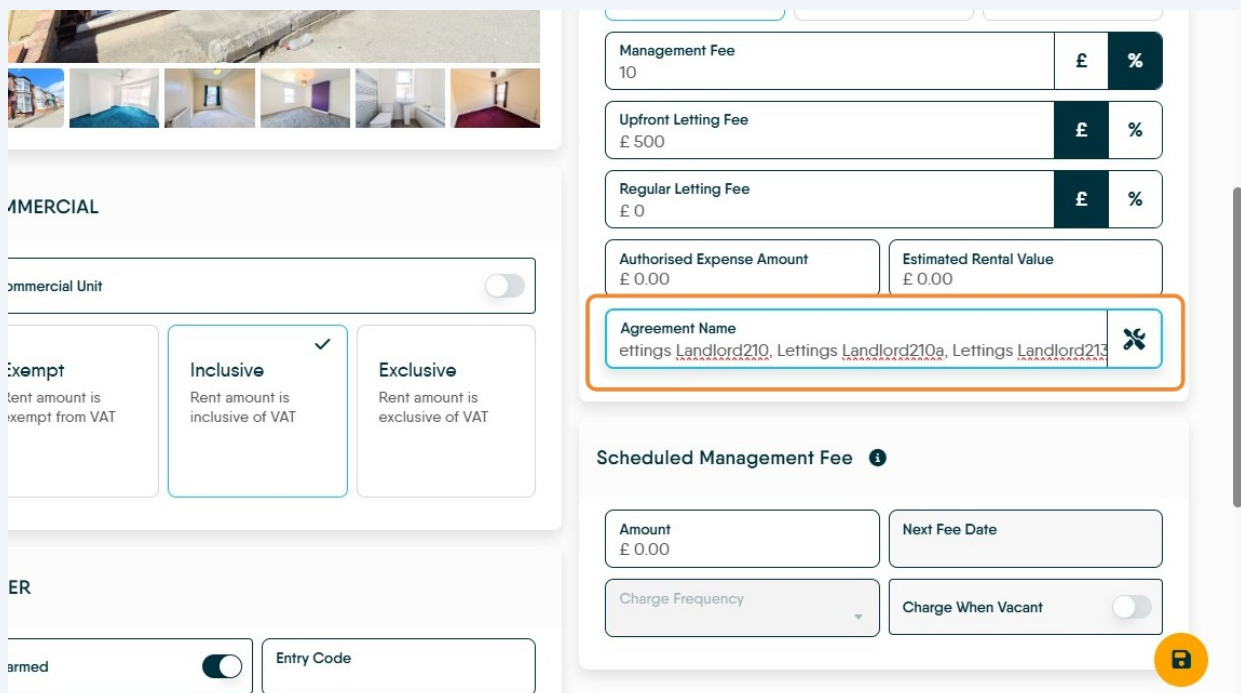


18

Once the new landlord is added, click here to update the '**Agreement Name**' to be shown on any AST that are sent out or wherever the Agreement Name is shown..



The screenshot shows a property management interface. On the left, there's a sidebar with a search bar and a list of properties. The main area is divided into two sections: 'COMMERCIAL' and 'OTHER'. The 'COMMERCIAL' section has a toggle for 'Commercial Unit' and three options: 'Exempt', 'Inclusive' (selected), and 'Exclusive'. The 'OTHER' section has a toggle for 'Alarmed' and an 'Entry Code' field. On the right, there's a 'Fully managed' section with a 'Management Fee' of 10, an 'Upfront Letting Fee' of £ 500, and a 'Regular Letting Fee' of £ 0. Below this, there's an 'Agreement Name' field with the text 'Lettings Landlord210, Lettings Landlord210a'. An orange circle highlights this field, and a 'Build Agreement Name' button is visible next to it. The 'Scheduled Management Fee' section is also visible, with fields for 'Amount', 'Next Fee Date', 'Charge Frequency', and 'Charge When Vacant'.



This screenshot is similar to the one above, but the 'Agreement Name' field is highlighted with an orange circle, and the 'Build Agreement Name' button is more prominent. The 'COMMERCIAL' section shows the 'Inclusive' option selected. The 'OTHER' section shows the 'Alarmed' toggle turned on. The 'Scheduled Management Fee' section is also visible, with fields for 'Amount', 'Next Fee Date', 'Charge Frequency', and 'Charge When Vacant'.

19

In the Landlord field it will now show the increased number of Landlords in this case "3". Also make sure that you go into the **'Payments'** tab and update the Landlord banks details and the payment split between the Landlords. To see how to do this [click here](#)

The screenshot displays a property management software interface. On the left is a sidebar with navigation tabs: Details, Checklist, Appraisals, Inspections, Accounts, Compliance, Information, maintenance, **Payment** (highlighted with an orange box), Marketing, and Key Control. The main content area shows a property listing for a 3-bedroom house with a rent of £1500.00 pcm. At the top, it indicates 'Let Agreed' and '1 Tenant'. Below this, there are two sections: 'Lead landlord: Lettings Landlord...' with a 'View Landlords' button, and 'Lead tenant: Mr Lettings Tenant...' with a 'View Tenants' button. The 'Lead landlord' section has a house icon with a '3' next to it, indicating three landlords. Below these sections are fields for 'Reference:', 'Negotiator: Training Dave', and 'Branch: Morgan & Co'. The main content area is divided into three sections: 'PROPERTY PICTURES' with an 'Upload' button and a photo of a brick house, 'Property Address' with a 'Postcode: DH2 2HX' field, and 'Property Information' with a 'Fully managed' checkbox checked and a 'Re' field.