

Importing Clients from CRM to movebutler



This guide offers a comprehensive walk through for importing clients from a CRM to movebutler, ensuring that all necessary information is accurate and complete. It highlights best practices, such as verifying client awareness of data sharing and utilising digital invitations for a smoother process. By following this guide, users can efficiently manage client and property data, maintain compliance, and streamline their workflow in movebutler.



Alert! Before you start on the movebutler process you need to ensure that all of the information on the CRM record is complete and correct. Email address and telephone numbers should not be copied from other users i.e. they need to be unique.

In this guide we will be looking at a Private Treaty sale not Auction.

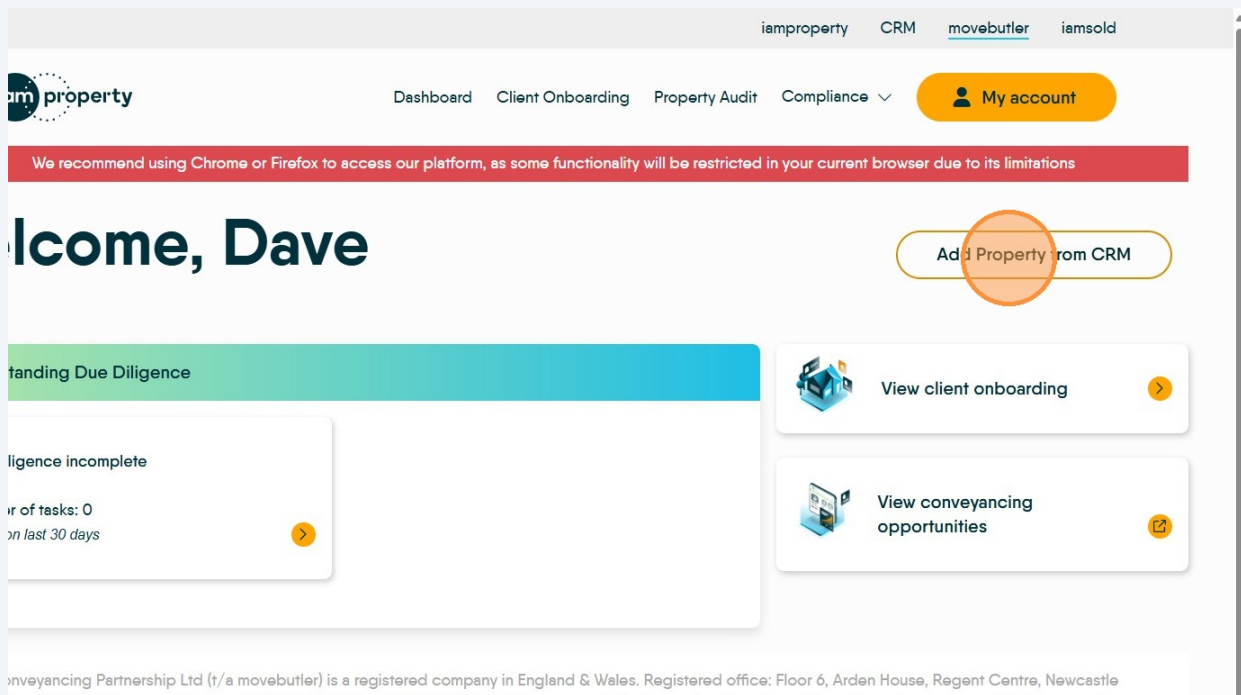
1

Navigate to the property whose Vendors (or purchasers) you are adding to movebutler
Click **"movebutler"**
If required click **"Sign In"**

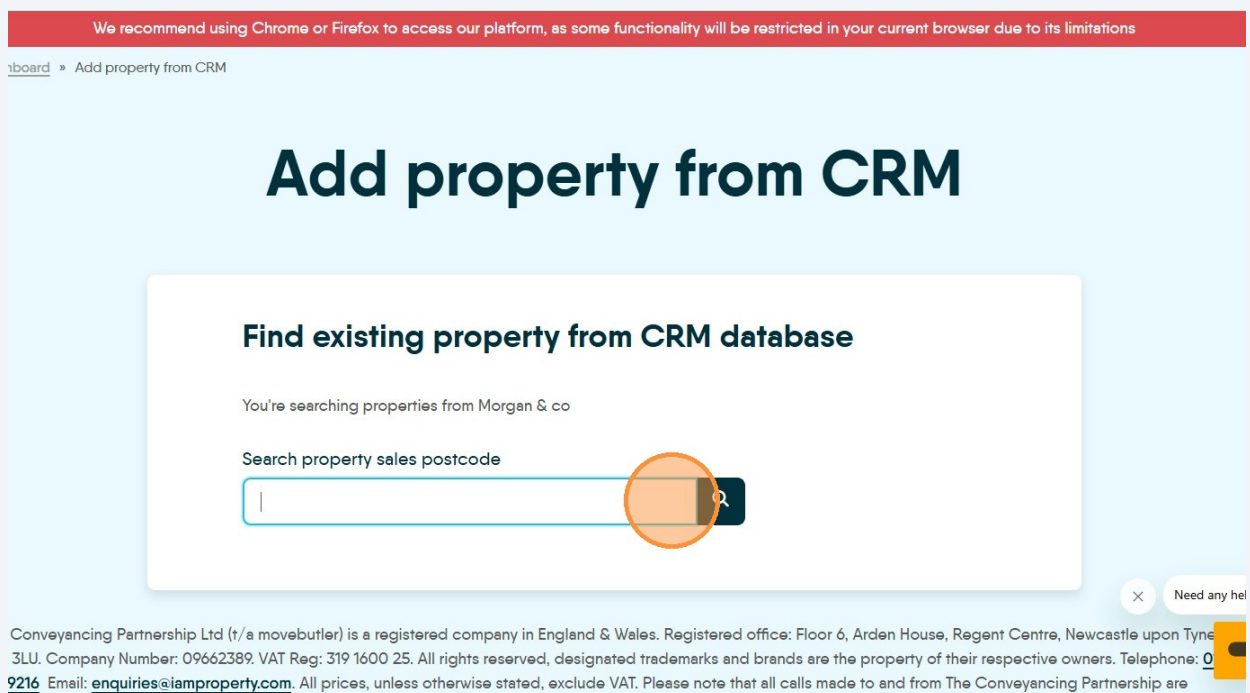
The screenshot displays the movebutler web application interface. The top navigation bar includes the 'iam property' logo, a menu with 'My day', 'Lettings', 'Sales', 'Accounts', 'Reporting', and 'Communications', and a 'My account' button. A left sidebar contains a list of navigation options: 'ps', 'Confirmed', 'Confirmed', 'tacted', 'Details', 'Checklist', 'Properties', 'Contacts', 'Documents', 'Journal', 'Sign', and 'udit'. The main content area is divided into three sections: 'Personal Information', 'Vendor Address', and 'Contact Notes'. The 'Personal Information' section contains fields for Title (Mr), Forename (David), Surname (Vendor32), Company Name, Salutation (Vendor32), Website, Phone Number (01322463256996), Work phone, Mobile phone (07852325002), Email Address (zagg.dave@gmail.com), and Source (Advert). The 'Vendor Address' section includes fields for Address type (Contact), Postcode (DH2 2HX), Address (87 Pelaw Crescent, Chester le Street, County Durham, DH22HX, UK), House (7599), Line1 (Pelaw Crescent), Line2, Town (Chester le Street), County (County Durham), and Country (UK). The 'Contact Notes' section features a text area with a rich text editor toolbar (B, I, U) and a placeholder text 'Enter Contact Notes'.

- 2 Once in movebutler we will be adding a new client and property.

Click **"Add Property from CRM"**



- 3 Click the "Search property sales postcode" enter and search for the property in the drop down list.



iamproperty CRM movebutler iamsold

iam property

Dashboard Client Onboarding Property Audit Compliance

My account

We recommend using Chrome or Firefox to access our platform, as some functionality will be restricted in your current browser due to its limitations

Add property from CRM

Add property from CRM

Find existing property from CRM database

You're searching properties from Morgan & co

Search property sales postcode

7599, Pelaw Crescent, Chester le Street, County Durham, DI

4 Next set the Transaction Type and Method of Sale options. For example click 'Sale'

If the price is set in the property record it will copy over

Property address

7599 Pelaw Crescent, Chester le Street, England, DH2 2HX

Property value

£ GBP 140000

Property type

☒ Residential ☐ Commercial

Transaction type

☒ Sale ☐ Purchase

Method of sale

☐ Private treaty ☐ Auction

Continue

5

Then click **"Private treaty"** or **"Auction"** as required

Property address

7599 Pelaw Crescent, Chester le Street, England, DH2 2HX  

Property value

£ GBP

140000

Property type

☒ Residential

☐ Commercial

Transaction type

☒ Sale

☐ Purchase

Method of sale

☐ Private treaty

☐ Auction

Continue

6

Click **"Continue"**

Property address

7599 Pelaw Crescent, Chester le Street, England, DH2 2HX  

Property value

£ GBP

140000

Property type

☒ Residential

☐ Commercial

Transaction type

☒ Sale

☐ Purchase

Method of sale

☒ Private treaty

☐ Auction

Continue

×

Need any help?



7

Import the client (Vendor) details by selecting from the drop down menu. This menu will show all the Vendors attached to this property

Transaction Address: 7599 Pelaw Crescent, DH2 2HX

Import clients from the CRM into movebutler

You're currently importing client from Morgan & co

Please select any remaining CRM client(s) associated with this transaction address to import their details into movebutler. Please note, you must import the client continue to move on to the next onboarding steps and add them to this transaction.

Select client

David Vendor32



Import selected

All Imported clients

There are currently 0 clients in movebutler's database that have been imported from CRM.

Please select a client from the list above and click 'Import Selected Client'. Once imported they will display in this table and you will be able to continue to add transaction in the following screens.

8

Click "Import selected client"

Transaction Address: 7599 Pelaw Crescent, DH2 2HX

Import clients from the CRM into movebutler

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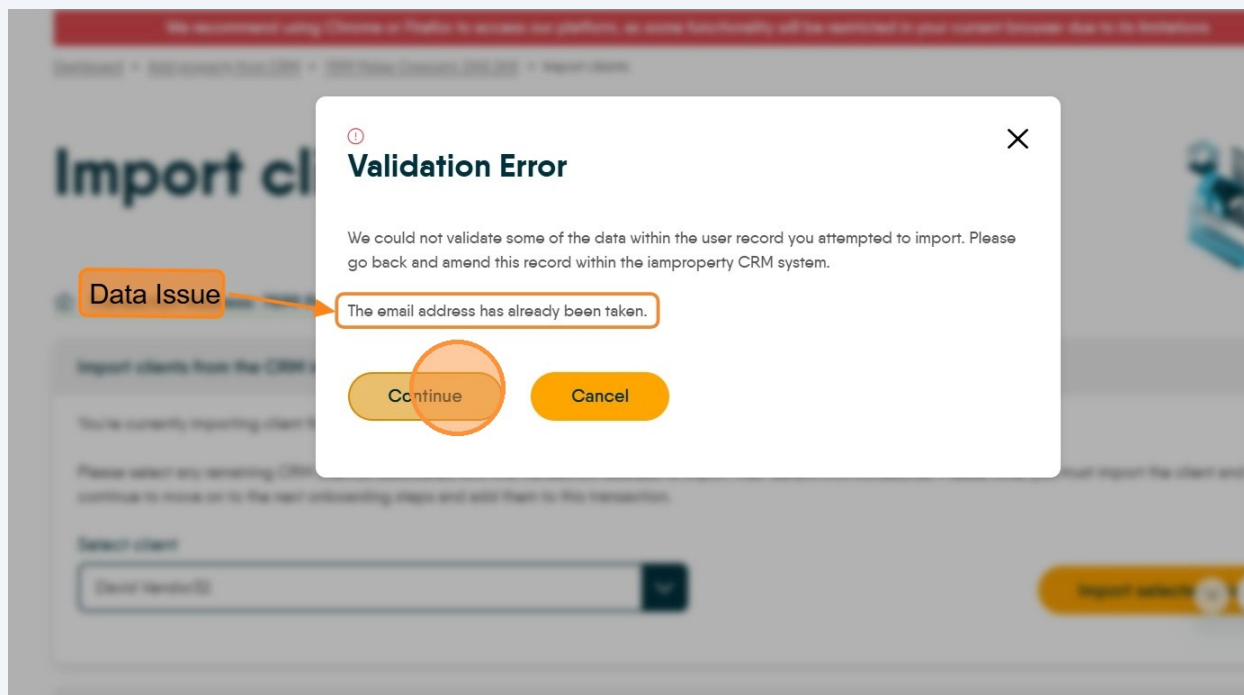
Please select a client from the list above and click 'Import Selected Client'. Once imported they will display in this table and you will be able to continue to add them to this transaction in the following screens.

Need any help?

Continue to next step

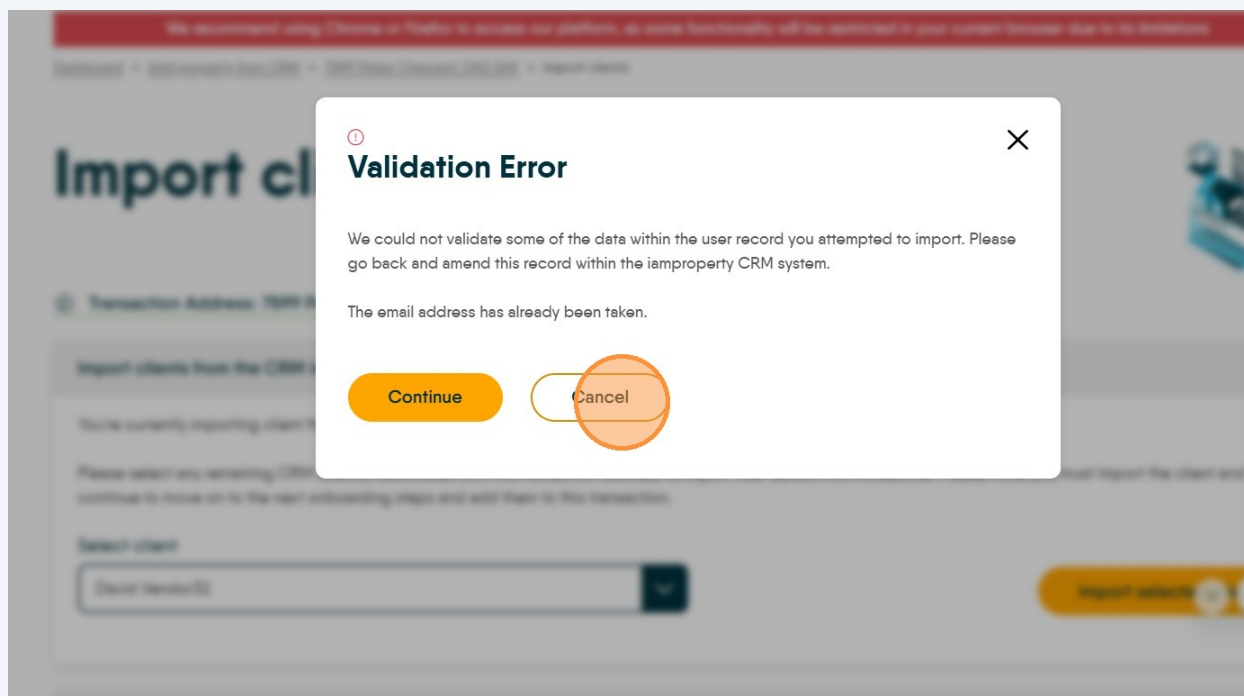
9

If there are any errors in the data within CRM then you will see a 'Validation Error' message, fix the issue and click "Continue". This screen will identify the data issue.



10

or click "Cancel" and return to CRM to fix the issue.



11 If successful you will see "**Success Client imported successfully.**"

The screenshot shows the 'Import clients from CRM' page in the 'movebutler' tab. A green success message box at the top right states 'Success Client imported successfully.' The page title is 'Import clients from CRM'. Below the title, the transaction address is '7599 Pelaw Crescent, DH2 2HX'. A section titled 'Import clients from the CRM into movebutler' contains the text: 'Currently importing client from Morgan & co'. Below this, it says: 'Select any remaining CRM client(s) associated with this transaction address to import their details into movebutler. Please note, you must import the client and click to move on to the next onboarding steps and add them to this transaction.' A table with one row is partially visible, showing a client name.

12 To **Import multiple clients** use the dropdown as many times as you need to import all clients associated with the property.

The screenshot shows the 'Import multiple clients' page in the 'movebutler' tab. A dropdown menu is labeled 'Select a client from CRM...'. A green success message box at the top right states 'Success Client imported successfully.' Below the dropdown, a section titled 'All Imported clients' contains a blue information box: 'Import multiple clients: You can use the dropdown above as many times as you need to import all clients associated with this property.' Below this, it says: 'Here are a list of the CRM imported clients for this property.' A table with two columns, 'Client name' and 'Client type', is shown with one row: 'David Vendor32' and 'Vendor'. A 'Continue to next' button is at the bottom right.

13 Once all Vendors are added to movebutler Click "Continue to next step"

a client from CRM...

Import selected client

Success
Client imported successfully.

Imported clients

Import multiple clients: You can use the dropdown above as many times as you need to import all clients associated with this property.

a list of the CRM imported clients for this property.

Name	Client type
Vendor32	Vendor

Continue to next step

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14 Check the Address details are correct. Click "Next"

Please note: You are entitled to one Free Title Register per transaction. Any additional Title Register requests will be billed at the usual charge of £7.00 per Title as set by the Land Registry.

Confirm Address

Transaction Address
7599 Pelaw Crescent, Chester le Street, County Durham, DH2 2HX, England

Confirm Address

Please confirm below the building name/number and postcode for this address:

Building Name/Number*	Postcode*
7599	DH2 2HX

Next

[Can't find the Title you're looking for? Skip this step](#)

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15 If there is no title registered for the property you will see this warning message.

The screenshot shows the 'iam property' dashboard. The top navigation bar includes 'Dashboard', 'Client Onboarding', 'Property Audit', 'Compliance', and a 'My account' button. Below the navigation bar, the address 'Law Crescent, Chester le Street, County Durham, DH2 2HX, England' is displayed. A large orange warning box contains the following text: 'No title number has been identified from the data supplied. This does not necessarily mean that a register of a title does not exist but only that insufficient data has matched. Where the property is unregistered, request the vendor provides a copy of the conveyance or assignment and right to sell documents.' Below the warning box, there is a form with a 'Value' field containing '140000.00', a 'Price or purchase price of sale' section with 'Private treaty' and 'Auction' options, and a 'Need any' button at the bottom right.

16 Click here and select the (previously added clients) clients from the drop down.

The screenshot shows the 'About your clients' page in the 'iam property' dashboard. The top navigation bar includes 'Dashboard', 'Client Onboarding', 'Property Audit', 'Compliance', and a 'My account' button. Below the navigation bar, the page title 'About your clients' is displayed. A light blue banner contains the text: 'Clients imported from CRM: No need to create a new client, imported clients can be found by searching for the client name.' Below the banner, there is a 'Find existing client...' section with a 'Search...' input field. An orange circle highlights the search input field. Below the search field, there is a section titled 'Or use the form below to create a new client'. This section includes a 'Client type' section with 'Vendor only' and 'Buyer only' options, and a 'Legal type' section with 'Individual' and 'Company' options. To the right of the 'Client type' and 'Legal type' sections, there is a 'Correspondence address' section with a checkbox labeled 'Same as transaction address', a 'Postcode Search' input field, and a link 'Or enter address manually'.

About your clients

Clients imported from CRM: No need to create a new client, imported clients can be found by searching for the client name.

Find existing client...

Search...

David Vendor32 (7599)

Chris Hemsworth (19)

Robert De Niro (4)

Jones Smith (2)

Sales Applicant12 Applicant12 (1)

Sales Applicant17 (12 Yew Tree Close)

Correspondence address

☐ Same as transaction address

Postcode Search

[Or enter address manually](#)

Title *

Please select a title

First Name *

Capacity *

17

Complete all the fields, it is good practice to set the date of birth and sex at this point. Select the "Legal Owner / Beneficial Owner" option.

Use the form below to create a new client

Client type

Vendor only

Buyer only

Client type

Individual

Company

Title *

Mr.

First Name *

David

Middle Name (optional)

Surname *

Vendor32

Email Address

zaggy.dave1@gmail.com

Date of Birth (optional)

dd/mm/yyyy

Sex (optional)

Select...

Correspondence address

☐ Same as transaction address[Use postcode lookup](#)

Address Line 1

7599

Address Line 2

Pelaw Crescent

Address Line 3

Town/City

Chester le Street

County

County Durham

Postcode

DH2 2HX

Country

England

Capacity *

Legal Owner / Beneficial Owner

Need any help?



Alert! Before you complete and move on from this screen make sure ALL legal owners are added to this check and individual risk assessments are raised.

Also make sure your clients are aware that movebutler is being used.

18 Click "Save and Continue"

Name (optional) Surname * Vendor32

Address Date of Birth (optional) dd/mm/yyyy

Email .clavel@gmail.com

Country England

County County Durham

Postcode DH2 2HX

Capacity * Legal Owner / Beneficial Owner

You must add all legal owners and conduct individual Risk assessments.

Save and Continue

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19 Click "Please confirm you have made your client(s) aware that their data is being shared with movebutler."

Onboarding Clients

Name	Client Type
David Vendor32	Vendor

☐ Please confirm you have made your client(s) aware that their data is being shared with movebutler.

How would you like to onboard your client? Please select:

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The best practice is to use the online process. So the customer can complete and add their own information. Click **"Send customer a digital invitation"**.

Onboarding Clients

Name	Client Type
David Vendor32	Vendor

☒ Please confirm you have made your client(s) aware that their data is being shared with movebutler.

How would you like to onboard your client? Please select:

Send customer a digital invitation I will continue in platform

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If your customer cannot use the digital route. Click "I will continue in platform"

Onboarding Clients

Name	Client Type
David Vendor32	Vendor

☒ Please confirm you have made your client(s) aware that their data is being shared with movebutler.

How would you like to onboard your client? Please select:

Send customer a digital invitation I will continue in platform

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Click "**Continue**" This will send an electronic invite to the client for them to complete the movebutler checks, or allow you to continue in platform to run the checks alongside the customer.

Onboarding Clients

Name	Client Type
David Vendor32	Vendor

☒ Please confirm you have made your client(s) aware that their data is being shared with movebutler.

How would you like to onboard your client? Please select:

Send customer a digital invitation

I will continue in platform

Continue

X

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