

How To Update And Match A Lettings Applicant



In this guide we follow what is best practice when adding a CRM Applicant record (Sales or Lettings).

Once the basic applicant record has been created and while you have the applicant on the phone, it is best practice to carry on and add in the other details for the customer and try to match them.

This guide walks you through the steps to configure search parameters and link the applicant to matching properties effectively.

1

Once you have created your applicant, there are 2 options at the bottom of the screen. The default is the '**Create & View**' option which is the option we will use, the other option is 'Create & Close' (click the down arrow option for this).

Create Applicant

2

Once you are in the Applicant Record. Update the "**Status**" field, select the (default) "**Active**" option, or use one that your company has added themselves. N.B. at this point you should not be selecting InActive or Archived.

In the Personal Information field you can add any additional information you might want to add.

iampropertyCRMmovebutleriamsold

propertyMy dayLettingsSalesAccountsReportingCommunications

£0.00

LA Lettings Applicant281
applicant281@mailinator.com
07712212223

APWarningSet GDPR

1000 Yew Tree Close, Hurworth, Darlington, DurhamLettings

reference:Negotiator: Training DaveBranch Morgan & CoStatus Active

Personal Information

TitleForename LettingsSurname Applicant281Company Name

WebsitePhone Number 07712212223Work phoneMobile phone 07712212223

Email Address applicant281@mailinator.coiSalutationSourceTemperature

Applicant AddressEdit Manually

£0.00

LA Lettings Applicant281
applicant281@mailinator.com
07712212223

APWarningSet GDPR

1000 Yew Tree Close, Hurworth, Darlington, DurhamLettings

reference:Negotiator: Training DaveBranch Morgan & CoStatus No status

Personal Information

TitleForename LettingsSurname Applicant281Company Name

WebsitePhone Number 07712212223Work phoneMobile phone 07712212223

Email Address applicant281@mailinator.coiSalutationSourceTemperature

Applicant AddressEdit Manually

PostcodeDL22HX

Address1000 Yew Tree Close, Hurworth, Darlington, Durham, DL22HX, UK

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Add any '**Contact Notes**' you would like to add, for example that the applicant works shifts and is only available after a certain time.

The screenshot shows a web form with two main sections. The top section, 'Contact Notes', is highlighted with an orange border and contains a text area with a placeholder 'Type Contact Notes here...'. The bottom section, 'Applicant Criteria', includes a search bar with the placeholder 'Search for area Enter a location', a 'Miles' dropdown menu set to '1/4 Mile', and an 'Add area' button. Below these are fields for 'Min Price' (£0.00), 'Max Price' (£0.00), 'Minimum Bedrooms' (0), and 'Minimum Bathrooms' (0). A small orange icon is visible in the bottom right corner of the form area.

Set ApplicantCriteria

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Click the **Search for area** field. Type the search area (Street, Postcode Town etc) e.g. "Darlington" Select the **Miles** files to select the search radius e.g. "5 Miles" option.
Click "**Add area**" to save the area choice. The selected areas , there can be more than one selected, will show under the 'Search for area' field.

Applicant Criteria

Search for area
Enter a location

Q

Miles
1/4 Mile

Add area

No areas added

Min Price
£ 0.00

Max Price
£ 0.00

Minimum Bedrooms
- 0 +

Minimum Bathrooms
- 0 +

Move In Date
21/09/2026

Property type

Search property type

House ☐

Apartment ☐

Flat ☐

Maisonette ☐

Bungalow ☐

Property style

Search property style

Detached ☐

End Terrace ☐

House Share ☐

Link Detached ☐

Mews ☐

Applicant Criteria

Search for area
darlington

Q

Miles
1/4 Mile

Add area

Darlington UK

Darlington Train Station Princess Road, Darlington, UK

Darlington Memorial Hospital Hollyhurst Road, Darlington, UK

Darlington Hippodrome Parkgate, Darlington, UK

Darlington College Haughton Road, Darlington, UK

powered by Google

Move In Date
21/09/2026

Property type

Search property type

House ☐

Apartment ☐

Flat ☐

Maisonette ☐

Bungalow ☐

Property style

Search property style

Detached ☐

End Terrace ☐

House Share ☐

Link Detached ☐

Mews ☐

Applicant Criteria

Search for area
Darlington, UK



Miles
5 Miles

Add area

No areas added

Min Price £ 0.00

Max Price £ 0.00

Minimum Bedrooms

—

0

+

Minimum Bathrooms

—

0

+

Move In Date
21/09/2026

Property type

Search property type

House



Apartment



Flat



Maisonette



Bungalow



Property style

Search property style

Detached



End Terrace



House Share



Link Detached



Mews



Applicant Criteria

Search for area
Darlington, UK



Miles
5 Miles

Add area

No areas added

Min Price £ 0.00

Max Price £ 0.00

Minimum Bedrooms

—

0

+

Minimum Bathrooms

—

0

+

Move In Date
21/09/2026

Property type

Search property type

House



Apartment



Flat



Maisonette



Bungalow



Property style

Search property style

Detached



End Terrace



House Share



Link Detached



Mews



Applicant Criteria

Search for area
Enter a location

Miles
1/4 Mile

Add area

Darlington, UK + 5 Miles

Min Price

£ 0.00

Max Price

£ 0.00

Minimum Bedrooms

–

0

+

Minimum Bathrooms

–

0

+

Move In Date

21/09/2026

Property type

Search property type

House
Apartment
Flat
Maisonette
Bungalow

Property style

Search property style

Detached
End Terrace
House Share
Link Detached
Mews

5

Add the Minimum and Maximum prices the applicant is looking for. It is important that a value is added to these boxes, no applicant has a £0 budget!

£0.00

31 21/09/2026

licants

Applicant Criteria

Search for area
Enter a location

Miles
1/4 Mile

Add area

Darlington, UK + 5 Miles

Min Price

£ 1,500.00

Max Price

£ 1,600

Minimum Bedrooms

–

0

+

Minimum Bathrooms

–

0

+

Move In Date

21/09/2026

Property type

Search property type

House
Apartment
Flat
Maisonette
Bungalow
Other
Land

Property style

Search property style

Detached
End Terrace
House Share
Link Detached
Mews
Semi-Detached
Terraced

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6

Set the **"Minimum Bedrooms"** and **"Minimum Bathrooms"** the applicant wants. The search will look at this number upwards, so it is possible to put 0, this would look for houses with 0 or more rooms.

The screenshot shows the 'Applicant Criteria' section of the iamproperty CRM. The search area is set to 'Darlington, UK + 5 Miles'. The price range is from £1,500.00 to £1,600. The move-in date is 21/09/2026. The 'Minimum Bedrooms' and 'Minimum Bathrooms' fields are highlighted with an orange box, both set to 0. The property type and style sections are also visible, with various options like House, Apartment, Flat, Maisonette, Bungalow, Detached, End Terrace, House Share, Link Detached, and Mews.

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If the Applicant has specific requirements for a property these can be recorded in the **Property Type**, **Property Style** fields. These will affect the initial property search results and return property types the applicant wants.

The screenshot shows the 'Applicant Criteria' section of the iamproperty CRM. The search area is set to 'Darlington, UK + 5 Miles'. The price range is from £1,500.00 to £1,600. The move-in date is 21/09/2026. The 'Minimum Bedrooms' and 'Minimum Bathrooms' fields are highlighted with an orange box, both set to 3 and 1 respectively. The 'Property type' and 'Property style' sections are also visible, with various options like House, Apartment, Flat, Maisonette, Bungalow, Other, Land, Detached, End Terrace, House Share, Link Detached, Mews, Semi-Detached, and Terraced.

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The **"Property attributes"**, **"Rightmove type"**, **"Property age"**, **"Custom style"** and **"Other criteria"** fields are primarily for information and are set by yourselves. They only change the match if the option to use additional filters is used.

☐ House ☐ Apartment ☐ Flat ☐ Maisonette ☐ Bungalow ☐ Other ☐ Land	☐ Detached ☐ End Terrace ☐ House Share ☐ Link Detached ☐ Mews ☐ Semi-Detached ☐ Terraced
Property attributes ☐ Pets Allowed ☐ Furnished ☐ Part Furnished ☐ Unfurnished ☐ Single Garage	Rightmove type Search Property Type ☐ Apartment ☐ Bar/Nightclub ☐ Barn ☐ Barn Conversion
Property age Search Property Age ☐ Period ☐ Pre-war ☐ Post-war ☐ Modern	Custom style Search Property Style ☐ 30's Semi ☐ Addison Homes ☐ Georgian ☐ Victorian
Other criteria ☐ Potential Vendor ☐ Double Glazing	

9

"Additional information" can be used for anything else you wish to capture.

The **"User Defined Fields"** are set by yourselves and are information required by yourselves.

The screenshot displays a web form interface. On the left, a sidebar contains a list of items, with '£0.00' at the top and '31 21/09/2026' below it. The main content area is divided into several sections. At the top, there is a 'Double Glazing' section with a toggle switch. Below this is the 'Additional Information' section, which features a text area with a placeholder 'Type Additional Information here...' and a rich text editor toolbar with 'B', 'I', and 'U' icons. Underneath is the 'User Defined Fields' section, which contains two input fields: 'Do you have Pets' and 'the home club'. The 'the home club' field has the value '0' entered. A yellow circular icon with a padlock is located at the bottom right of the form.

Quick Applicant Match

10 To match the applicant to your database click here.

Lettings Applicant281
applicant281@mailinator.com
07712212223

1000 Yew Tree Close, Hurworth, Darlington, Durham | Lettings

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

Personal Information

Title	Forename: Lettings	Surname: Applicant281	Company Name
Website	Phone Number: 07712212223	Work phone	Mobile phone: 07712212223
Email Address: applicant281@mailinator.coi	Salutation	Source	Temperature

Applicant Address [Edit Manually](#)

11 Click the **"Match"** option to open the match screen. This will match your new applicant against your current available stock.

£0.00

LA Lettings Applicant281
applicant281@mailinator.com
07712212223

1000 Yew Tree Close, Hurworth, Darlington, Durham | Lettings

reference: Negotiator: Training Dave Branch: Morgan & Co

Personal Information

Title	Forename: Lettings	Surname: Applicant281	Company Name
Website	Phone Number: 07712212223	Work phone	Mobile phone: 07712212223
Email Address: applicant281@mailinator.coi	Salutation	Source	Temperature

Applicant Address [Edit Manually](#)

Postcode: DL22HX Address: 1000 Yew Tree Close, Hurworth, Darlington, Durham, DL22HX, UK

- Add Call
- Log Call
- Create Letter
- Send SMS
- Send Email
- Match**
- Transfer to Tenancy
- archive
- E-Sign