

How To Add an Additional Landlord to a Letting Property



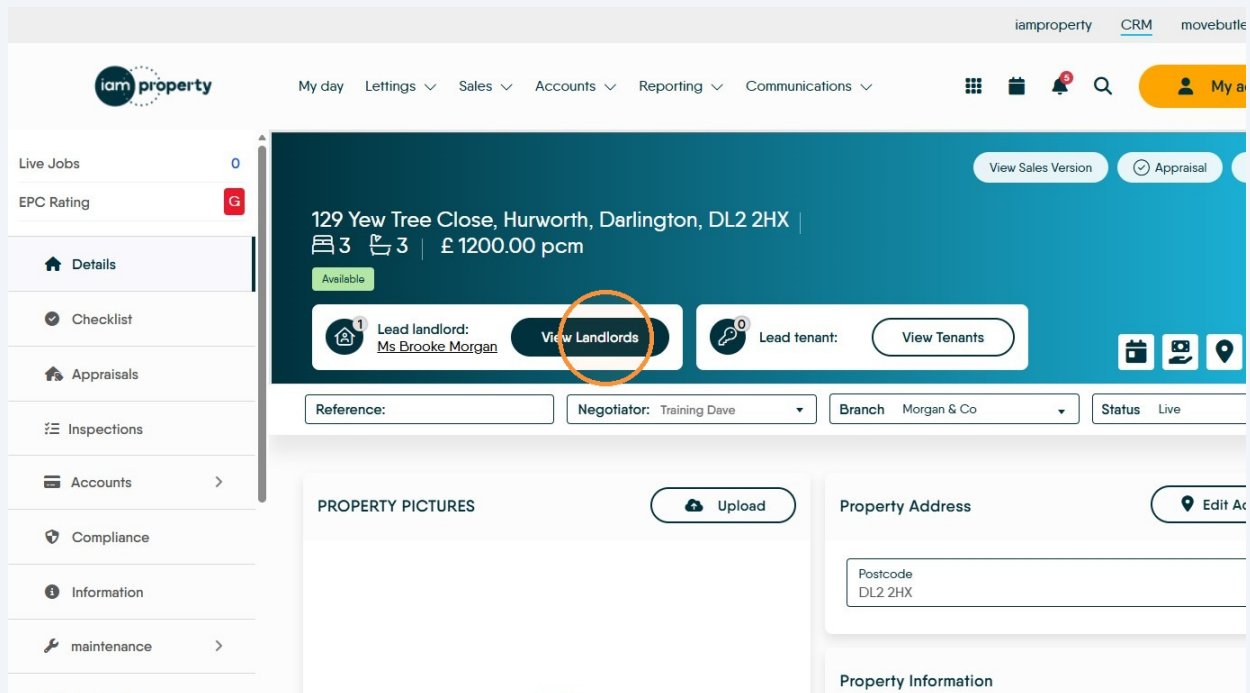
If you have multiple landlords for a property, even if they are a couple e.g. Mr&Mrs, best practice is to add both of them as separate entities to CRM and add both the the property record.

This guide shows how to do that.

- 1 Navigate to the property record you are adding the landlord to.

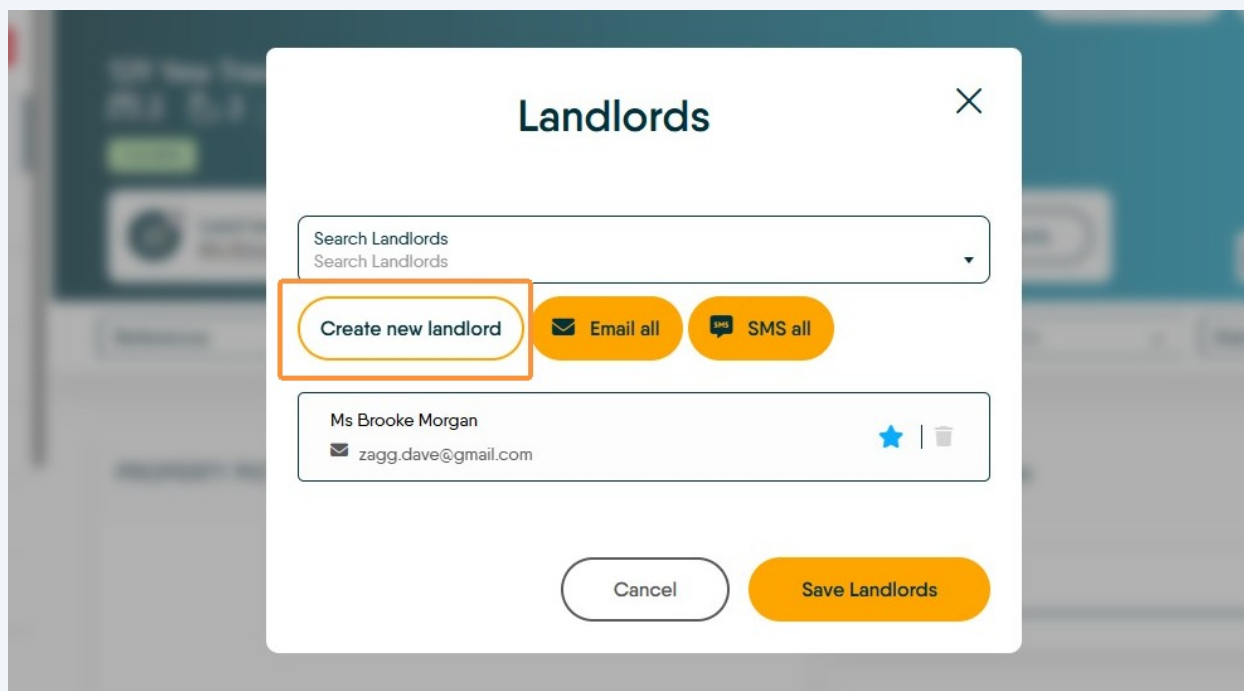
Open Property Record

2 Click "View landlords"



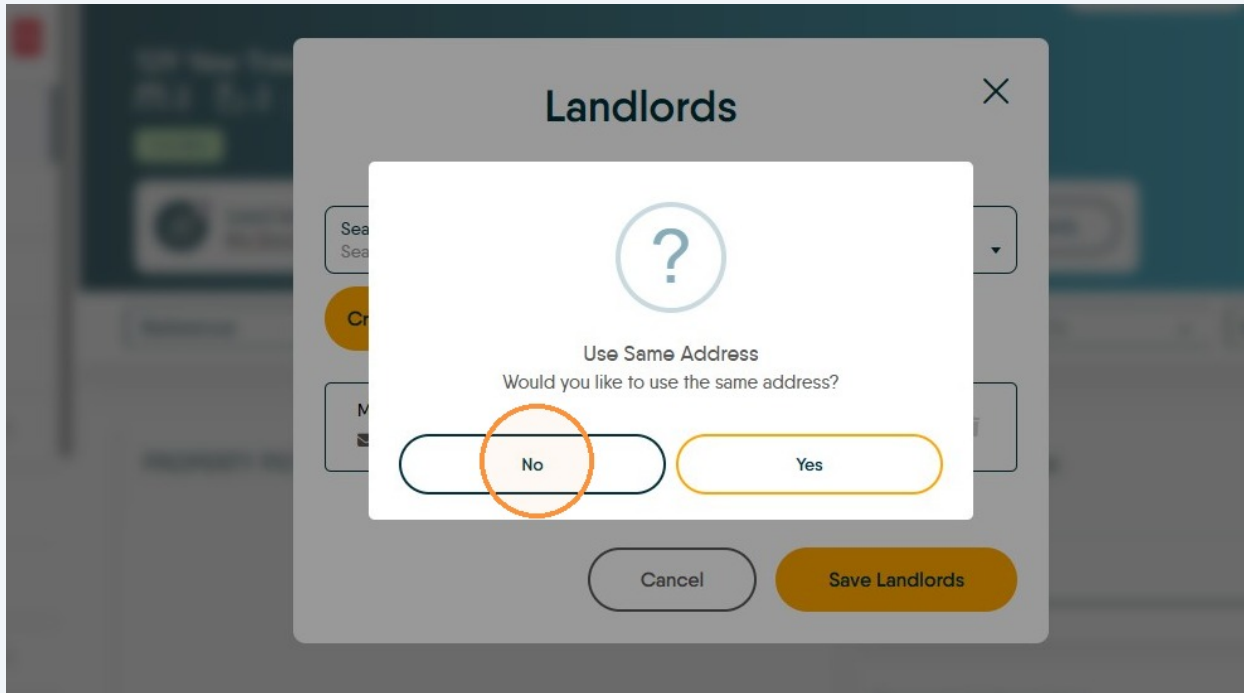
Create Landlord

3 Click "Create new landlord" if you need to create the new landlord record, if the landlord has already been added to the CRM all that is required is to search for the existing Landlord record, jump to [here](#)



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The majority of the time you will select "**No**". If your new Landlord lives at the same address as the property, click Yes to use the property address.



Enter Landlord Details

5

Enter the Landlords "**Forename**" and "**Surname**".

iam property

My day Lettings Sales Accounts Reporting Communications

My account

Properties 0

Confirmed x

Confirmed x

Contacted 01/01/0001 00:00

Details

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

Personal Information Import

Title Forename

Surname Company Name

Website Phone Number

Work phone Mobile phone

Email Address Salutation

Agreement Name Source

Financial Information

Overseas Tax Enabled

Exclude From Payments

Registration No CNR No

CNR Approval Date 21/09/2026 Tax Rate 0

VAT Registration No HMRC Due Date 21/09/2026

Statement No Statement Send Statement Via Email

6 Enter their email in the **Email Address** field.

Properties 0

Identity Confirmed x

Address Confirmed x

Last Contacted 01/01/0001 00:00

Details

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

Personal Information Import

Title Forename Lettings

Surname Landlord282 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 21/09/2026 Tax Rate 0

VAT Registration No HMRC Due Date 21/09/2026

Statement No Statement Send Statement Via Email

Safe Deposits Type Registered Safe Deposits Reg. No.

7

This is the absolute minimum of detail you need to add to a Landlord record, it is Best Practice to add all the detail that you have as soon as you have it. Click **'Save'** changes.

The screenshot shows a web form for adding a Landlord record. It is divided into three main sections: Personal Information, Financial Information, and Address. The Personal Information section includes fields for Title (Mr), Forename (Lettings), Surname (Landlord282), Company Name, Website, Phone Number (07712222324), Mobile phone, Work phone (07712222324), Email Address (landlord2828@mailinator.cc), Salutation (Mr Landlord282), Agreement Name (Mr Lettings Landlord282), Source, and Letting Reason. The Financial Information section includes toggle switches for Overseas, Tax Enabled, and Exclude From Payments, as well as fields for Registration No, CNR No, CNR Approval Date (21/09/2026), Tax Rate (0), VAT Registration No, HMRC Due Date (21/09/2026), Statement (No Statement), Send Statement Via (Email), Safe Deposits Type (Registered), and Safe Deposits Reg. No. The Address section includes fields for Address type (Contact), Postcode (DL2 2HX), and Address (129 Yew Tree Close, Hurworth, Darlington, Durham, DL2 2HX, UK). At the bottom right, there is a 'Save Changes' button and a lock icon, both of which are circled in orange.

Assign Landlord

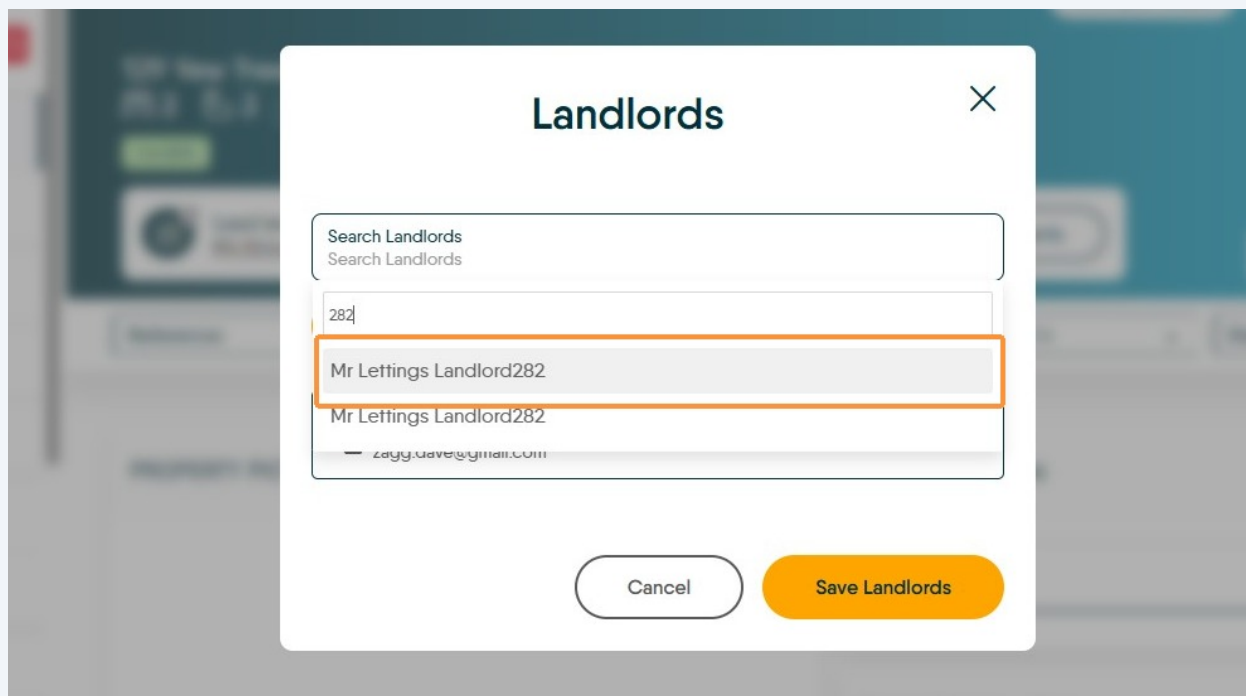
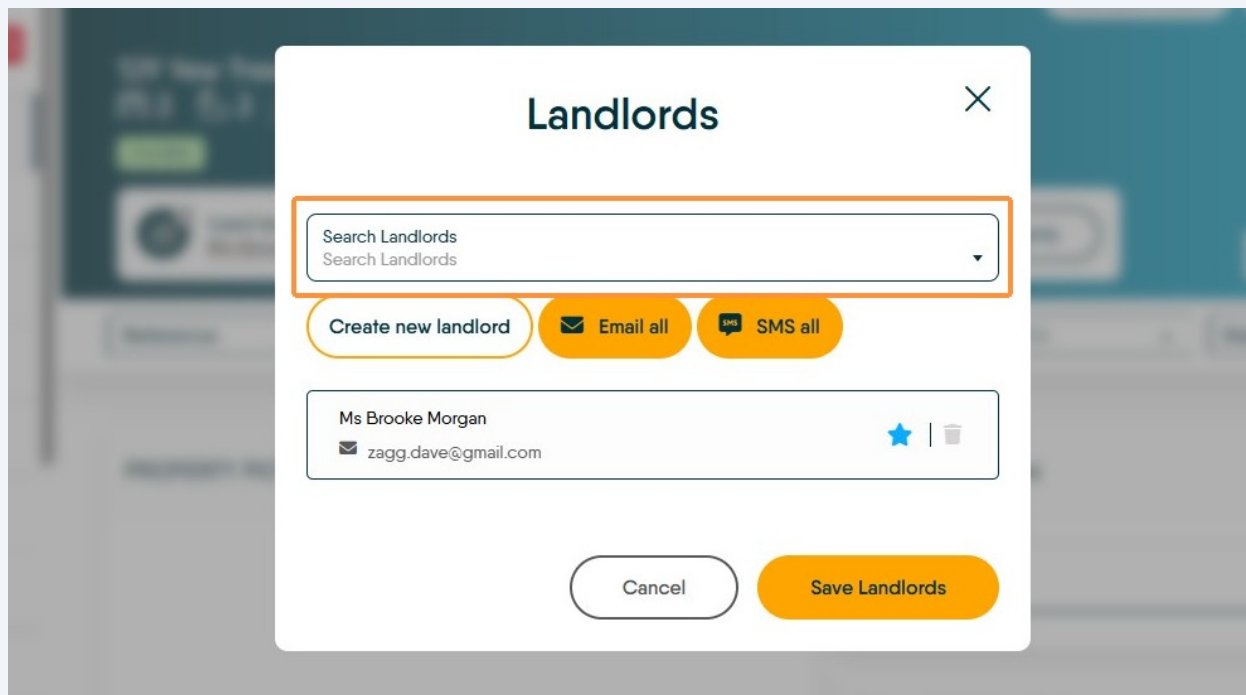
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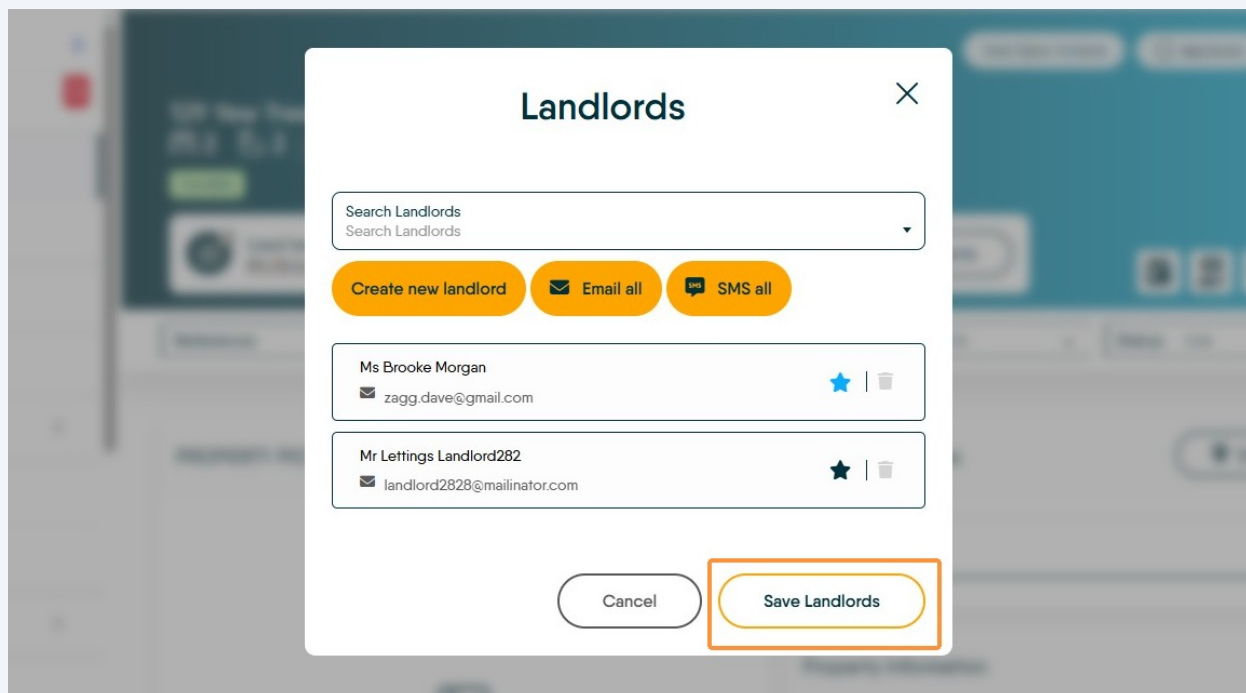
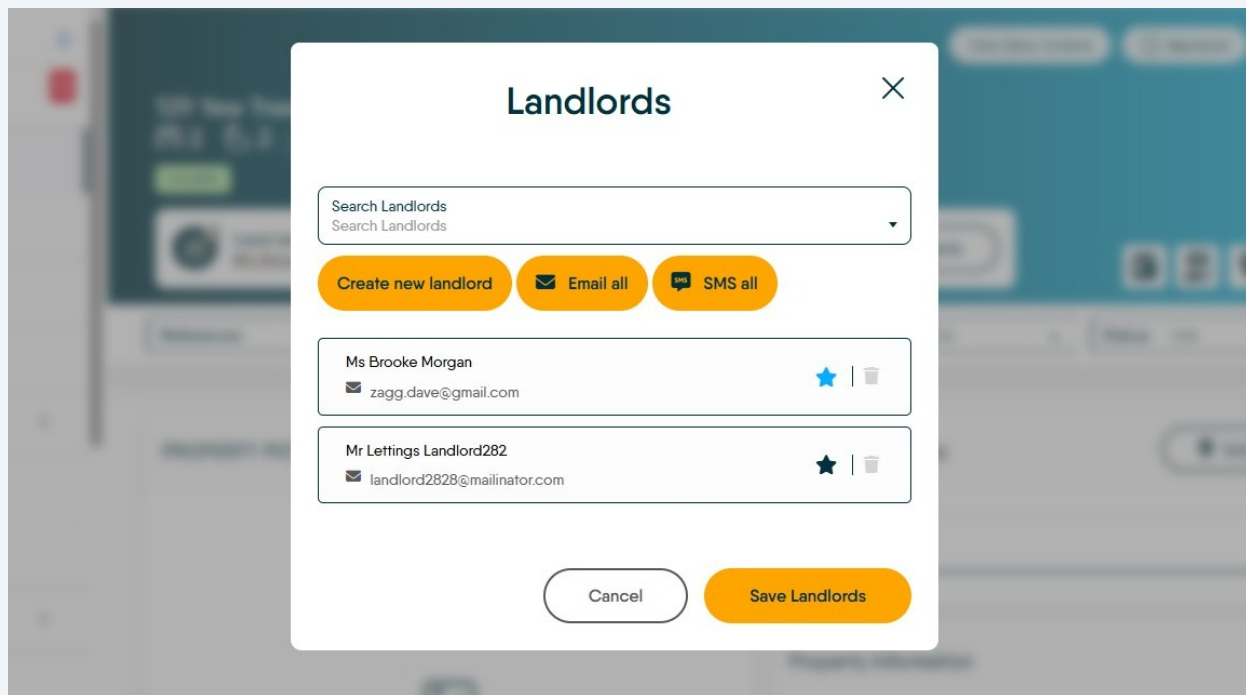
Click **"Search Landlords"** and search for either the existing record or the record that has just been created. From the drop-down menu select the Landlord name you want to use.

Click **"Save Landlords"**

Select the landlord name, in this case 'Mr Lettings Landlord282.'

Click **"Save Landlords"**





9

In the field showing the **"Lead Landlord"** name you will now see a number, in this case 2, which shows how many landlords there are total.

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View Sales

129 Yew Tree Close, Hurworth, Darlington, DL2 2HX |
🛏 3 🚿 3 | £ 1200.00 pcm
Available

1

🏠

Lead landlord:
Ms Brooke Morgan

View Landlords

0

🔑

Lead tenant:

View Tenants

Reference:

Negotiator: Training Dave

Branch Morgan & Co

PROPERTY PICTURES

Upload

Property Address

Postcode

0

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View Sales

129 Yew Tree Close, Hurworth, Darlington, DL2 2HX |
🛏 3 🚿 3 | £ 1200.00 pcm
Available

2

🏠

Lead landlord:
Ms Brooke Morgan

View Landlords

0

🔑

Lead tenant:

View Tenants

Reference:

Negotiator: Training Dave

Branch Morgan & Co

PROPERTY PICTURES

Upload

Property Address

Postcode