

# Vendor - Client Portals in iamproperty CRM



This guide will show the Vendor Portals. Giving a comprehensive walk-through of the client portals within the iamproperty CRM, making it an essential resource for users looking to enhance their Clients property management experience.

By following the detailed steps, users can efficiently access vendor functionalities, manage properties, view feedback, and handle compliance documents.

## Vendor Portal

### 1 Type your Username and Password Click "Sign In"

**1** Still getting used to new-look CRM?  
If so, you can still use the previous CRM by clicking the link on the right. [Click here](#)

### Sign in

Username  
PGreen10

Password  
.....

Remember me

[Forgot your password?](#)

**Your partner for today and tomorrow**

At iamproperty we're developing everything you need under one roof, one supplier relationship. With an ecosystem that will continue to grow and evolve with your agency, and freeing you up to do what you do best.

[Find out more](#)

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The first screen is the News Feed, this is set from the Configuration screen and is created by you.

Welcome Back, Pamela Green

### LATEST NEWS FROM OVHOMES.COM

**LATEST HOUSE PRICES REPORT - OXFORD** 20/06/2023

Please find below a link to the latest Oxford House Prices Report from Home.co.uk

[Home.co.uk: House Prices Report for Oxford - January 1995 to March 2023](#)

3

Click "Vendor Portal"

iam property

News

Landlord Portal

Statements

Vendor Portal



Welcome Back, Pamela Green

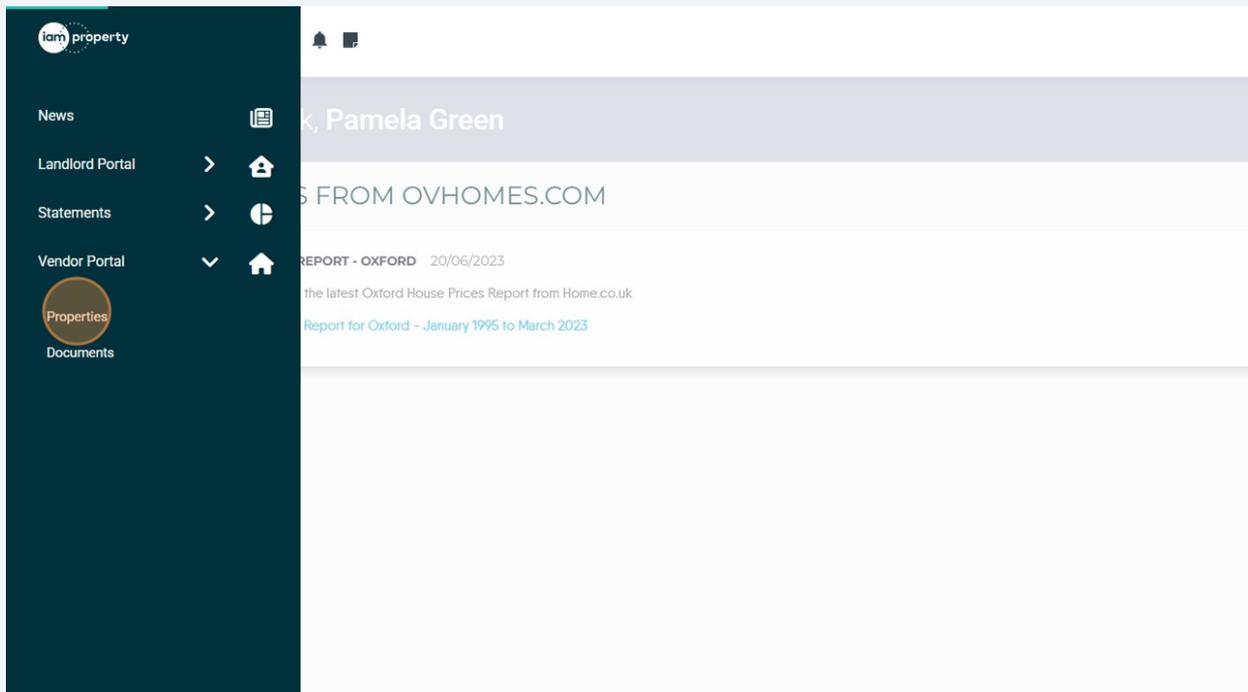
### LATEST NEWS FROM OVHOMES.COM

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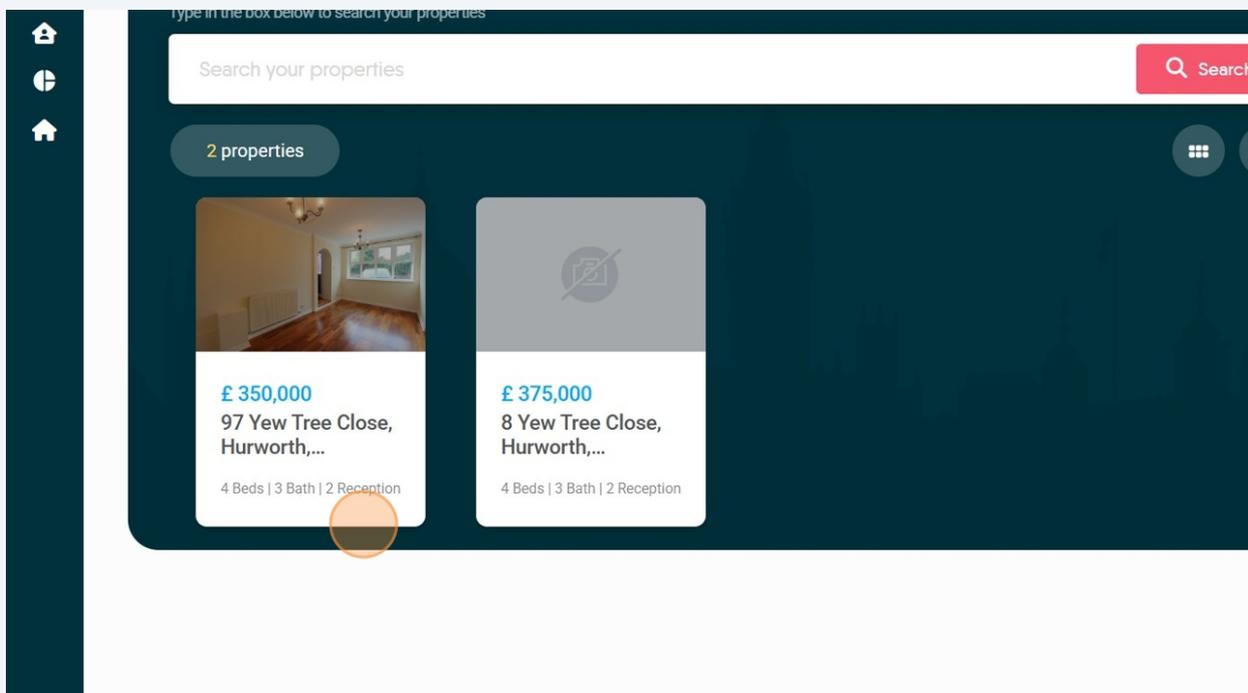
Please find below a link to the latest Oxford House Prices Report from Home.co.uk

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4 Click "Properties" this will display all properties controlled by the Landlord.



5 Click the property you want to view.



## Explore Your Properties

Type in the box below to search your properties

Search your properties

2 properties



£ 350,000

97 Yew Tree Close, Hurworth, Darlington, Durham, DL2 2HX

4 Beds | 3 Bath | 2 Reception



£ 375,000

8 Yew Tree Close, Hurworth, Darlington, Durham, DL2 2HX

4 Beds | 3 Bath | 2 Reception

6 This will take you to the Property screen.

This screen will show all the details that have been added to the Marketing screen in the Property record. There is also an option (highlighted) for the Vendor to toggle that they accept the details which will show on the Property record in CRM.

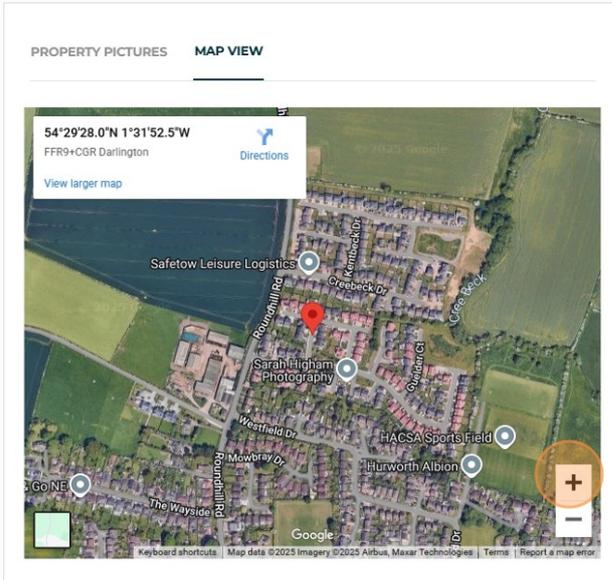
The screenshot shows the 'Property screen' in the CRM system. The top navigation bar includes the 'iam property' logo, a notification bell, and the user's name 'Pamela Green' with a profile icon. Below the navigation bar, there are tabs for 'VIEWINGS' and 'OFFERS', with the current offer price set at '£ 350,000'. The main header area displays the property address '97 Yew Tree Close, Hurworth, Darlington, Durham, DL2 2HX', along with icons for 4 bedrooms and 3 bathrooms, and the price '£ 350,000' with a 'Default' label and an 'Available' status. A left-hand sidebar contains navigation options: 'DETAILS' (highlighted), 'VIEWINGS', 'OFFERS', 'STATS', and 'JOURNAL'. The main content area is divided into two sections: 'PROPERTY PICTURES' and 'MAP VIEW'. The 'PROPERTY PICTURES' section shows a large image of the property's interior, with a smaller thumbnail strip below it. The 'MAP VIEW' section is currently empty. On the right side, there is an 'APPROVE CONTENT' section with a toggle switch set to 'ON' and the text 'Flag this property's content as approved'. Below this is a 'KEY FEATURES' section listing 'Garden', 'Garage', and 'windows'.

## 7 Click "Map View"

The screenshot shows the iarn property website interface. At the top, the address "97 Yew Tree Close, Hurworth, Darlington, Durham, DL2 2HX" is displayed along with icons for 4 bedrooms, 3 bathrooms, and a price of £35. On the left, a navigation menu includes "DETAILS", "VIEWINGS", "OFFERS", "STATS", and "JOURNAL". The main content area has two tabs: "PROPERTY PICTURES" and "MAP VIEW", with "MAP VIEW" highlighted in a red circle. Below the tabs is a large photo of an empty room with wooden floors and a window. To the right, there are sections for "APPROVE CONTENT" and "KEY FEATURES" which lists "Garden", "Garage", and "windows".

## 8 The vendor will be shown a map of where their property is, which can be a satellite view for added detail. Double-click this button.

The screenshot shows the iarn property website interface with the "MAP VIEW" tab selected. The map displays the property location in Darlington, with a red pin and a callout box showing coordinates: "54°29'28.0"N 1°31'52.5"W" and "FFR9+CGR Darlington". A red circle highlights a "satellite" button in the bottom left corner of the map. The map also shows nearby locations like "Safetow Leisure Logistics", "Sarah Higham Photography", "HACSA Sports Field", and "Hurworth Albion". The right-hand side of the page remains the same as in the previous screenshot, with "APPROVE CONTENT" and "KEY FEATURES" sections.



**APPROVE CONTENT**  
 Flag this property's content as approved

**KEY FEATURES**

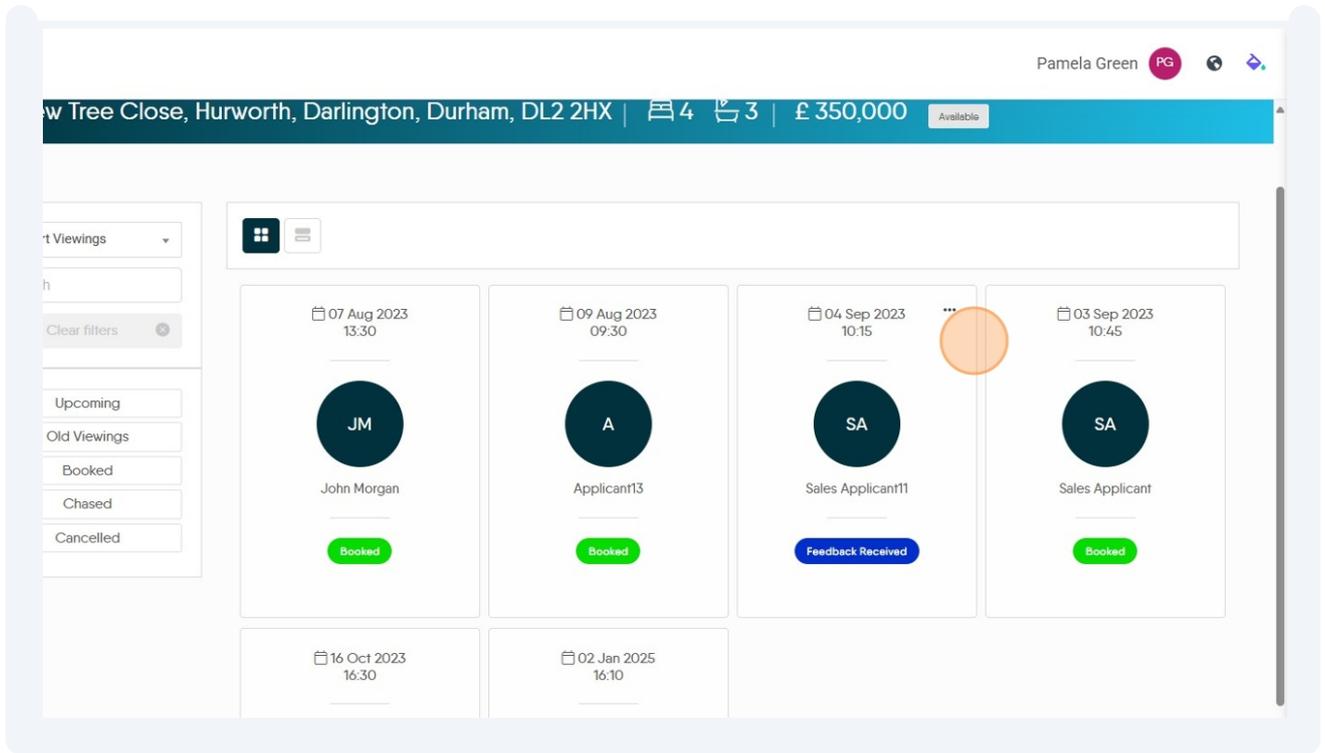
- Garden
- Garage
- windows

9 If feedback has been left for the viewing then this will be noted on the viewing and can be viewed.  
 Click "View Feedback"

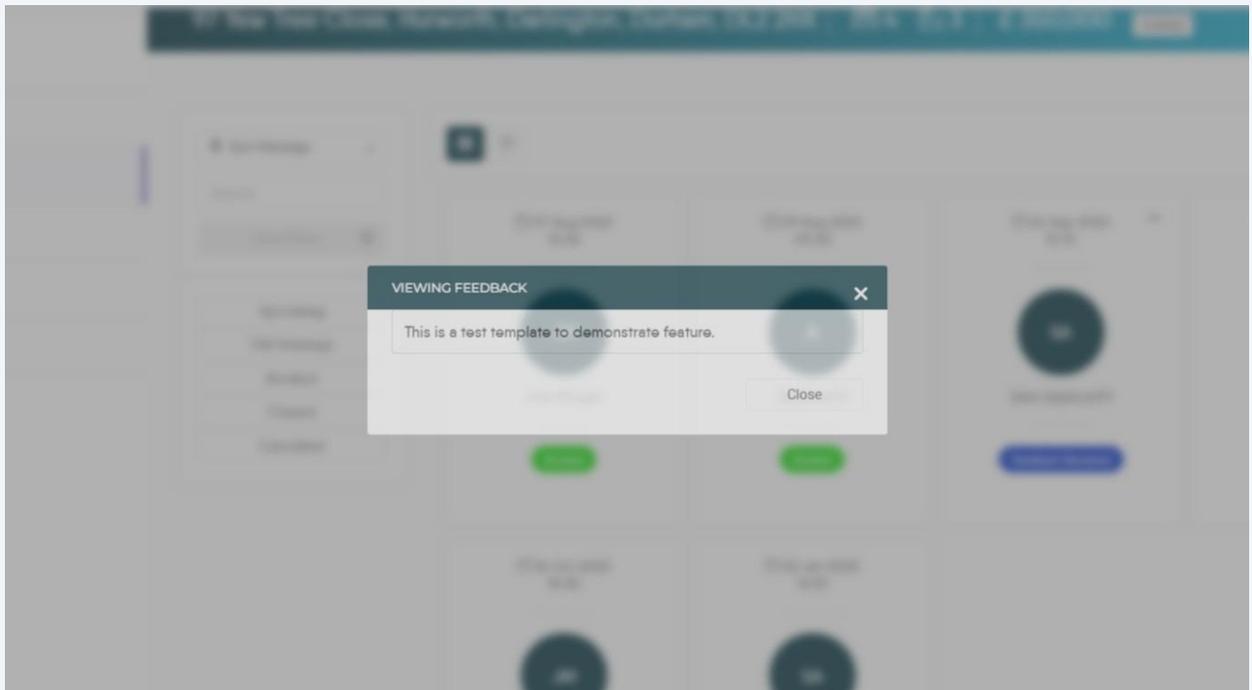
Pamela Green PG

w Tree Close, Hurworth, Darlington, Durham, DL2 2HX | 4 | 3 | £ 350,000 Available

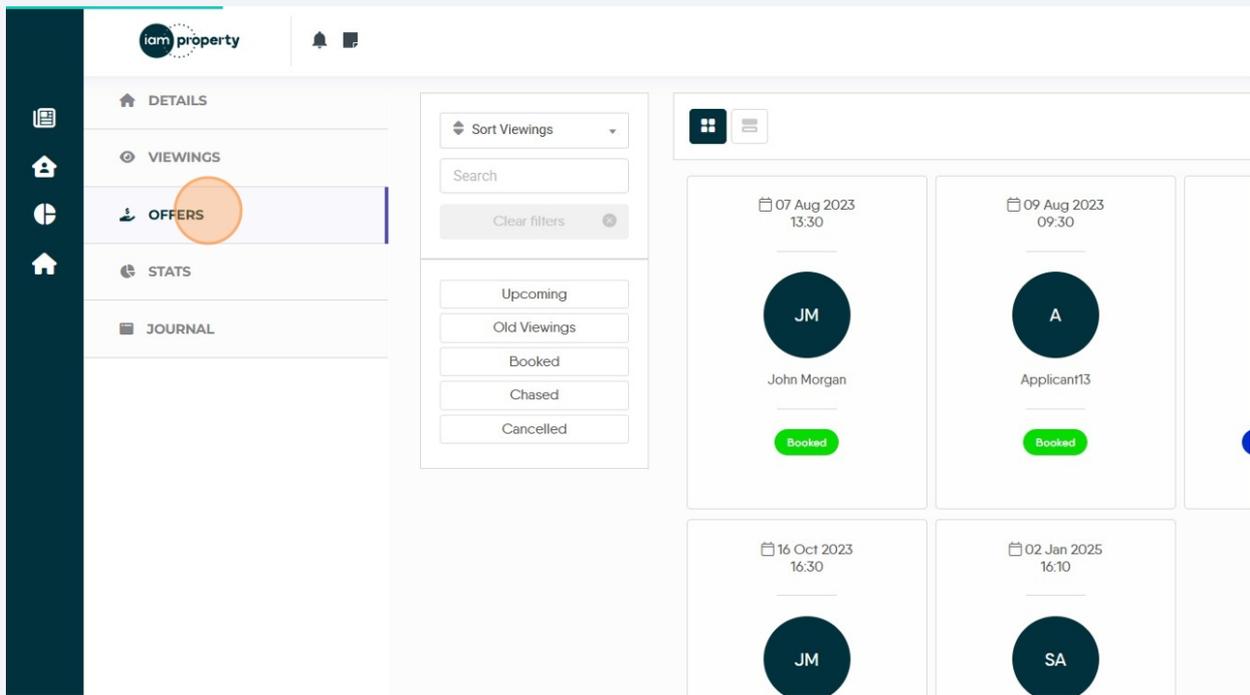
<p>07 Aug 2023 13:30</p> <p><b>JM</b> John Morgan</p> <p><span>Booked</span></p>	<p>09 Aug 2023 09:30</p> <p><b>A</b> Applicant13</p> <p><span>Booked</span></p>	<p>04 Sep 2023 10:15</p> <p><b>SA</b> Sales Applicant11</p> <p><span>Feedback Received</span></p>	<p>03 Sep 2023 10:45</p> <p><b>SA</b> Sales Applicant</p> <p><span>Booked</span></p>
<p>16 Oct 2023 16:30</p>	<p>02 Jan 2025 16:10</p>		



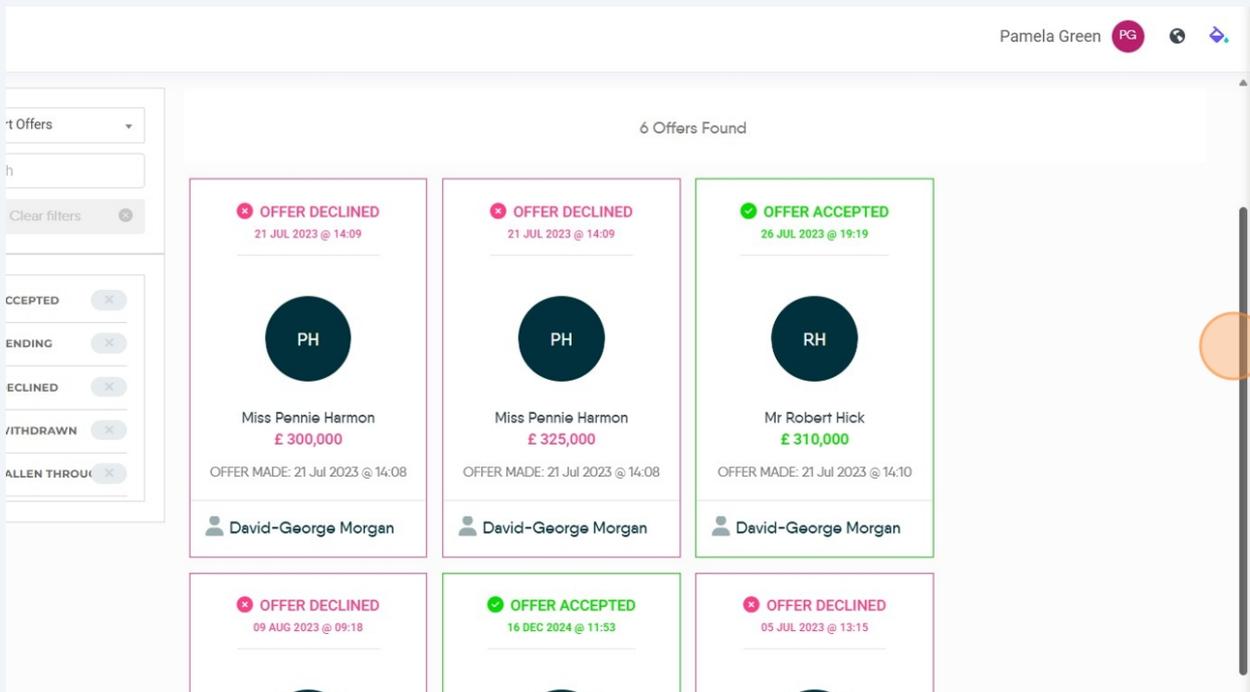
10 The feedback will then show on the screen



## 11 Click "Offers"



## 12 This will show all the offers made on a property. If an offer is clicked on.



Pamela Green PG

Clear filters

ACCEPTED X  
ENDING X  
DECLINED X  
WITHDRAWN X  
ALLEN THROUGH X

<p><b>OFFER DECLINED</b> 21 JUL 2023 @ 14:09</p> <p>PH</p> <p>Miss Pennie Harmon £ 300,000</p> <p>OFFER MADE: 21 Jul 2023 @ 14:08</p> <p>David-George Morgan</p>	<p><b>OFFER DECLINED</b> 21 JUL 2023 @ 14:09</p> <p>PH</p> <p>Miss Pennie Harmon £ 325,000</p> <p>OFFER MADE: 21 Jul 2023 @ 14:08</p> <p>David-George Morgan</p>	<p><b>OFFER ACCEPTED</b> 26 JUL 2023 @ 19:19</p> <p>RH</p> <p>Mr Robert Hick £ 310,000</p> <p>OFFER MADE: 21 Jul 2023 @ 14:10</p> <p>David-George Morgan</p>
<p><b>OFFER DECLINED</b> 09 AUG 2023 @ 09:18</p> <p>A</p> <p>Applicant13 £ 100,000</p> <p>OFFER MADE: 09 Aug 2023 @ 09:17</p>	<p><b>OFFER ACCEPTED</b> 16 DEC 2024 @ 11:53</p> <p>SA</p> <p>Mr Sales Applicant11 £ 350,000</p> <p>OFFER MADE: 16 Dec 2024 @ 11:52</p>	<p><b>OFFER DECLINED</b> 05 JUL 2023 @ 13:15</p> <p>LN</p> <p>Mr Luca Nugent £ 10</p> <p>OFFER MADE: 29 Jun 2023 @ 11:22</p>

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The Vendor will be taken to the Compliance for their property, where they can see the dates that items are completed. **This is only for Accepted Offers**

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Purchaser  
Robert Hick

,000 – 97 Yew Tree Close, Hurworth, Darlington, Durham, DL2 2HX

PROGRESS

OFFER ACCEPTED 21/07/2023

SOLICITOR INSTRUCTED 09/08/2023

SEARCHES ORDERED 09/08/2023

SEARCHES BACK

5 MORTGAGE OFFER

6 CONTRACTS EXCHANGED

COMPLETED

Sellers solicitor Instructed	✓ 09/08/2023
Buyers Solicitor Instructed	✗ Date Done
Memorandum of Sale Sent	✓ 09/08/2023

14 Click "Stats" to see the Rightmove Click Statistics for the Property.

1 VIEWINGS

1 OFFERS £ 350,000 ↑

97 Yew Tree Close, Hurworth, Darlington, Durham, DL2 2HX | 4 3 | £ 350,000

Available

DETAILS

VIEWINGS

OFFERS

**STATS**

JOURNAL

RIGHTMOVE CLICK STATISTICS

No clickstats available

LAST 7 DAYS	LAST 28 DAYS	TOTAL
VIEWED: 0	VIEWED: 0	VIEWED: 0
SEARCHED: 0	SEARCHED: 0	SEARCHED: 0
0.00%	0.00%	0.00%

15 Click here to access the Journal for the Property

1 OFFERS £ 350,000 ↑

97 Yew Tree Close, Hurworth, Darlington, Durham, DL2 2HX | 4 3 | £ 350,000

Available

DETAILS

VIEWINGS

OFFERS

STATS

**JOURNAL**

Sort Journal

DATE RANGE: 30/07/2023 - 09/09

Search

Clear filters

David-George Morgan

Feedback

1 Journals

DM David-George Morgan 04/09/2023 Feedback

97 Yew Tree Clos..

Feedback Received - Applicant11 - Public Feedback: This is a test template to demonstrate feature.

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Click "Documents" to show all the Documents uploaded to the Property record that have been made visible to the client portals.

