

Viewing Sales Progression for a Property in CRM

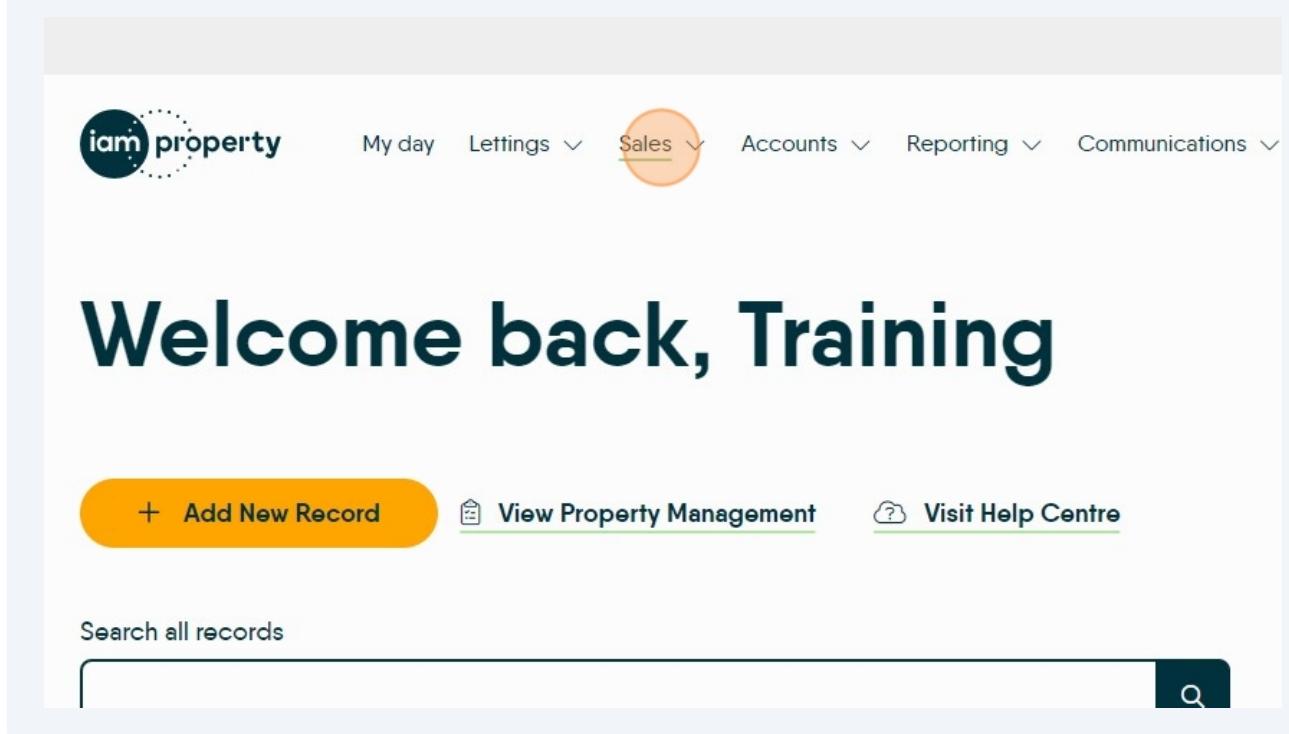
This guide provides a comprehensive overview of how to view and manage sales progression for a property within the CRM system. It outlines multiple methods to access the Sales Progression screen, ensuring users can choose the most convenient option for their needs. Additionally, it details how to complete necessary fields and manage chains for both purchasers and vendors, making it a valuable resource for effectively tracking property sales.

- 1 Navigate to <https://crm.iamproperty.com/MyDay>

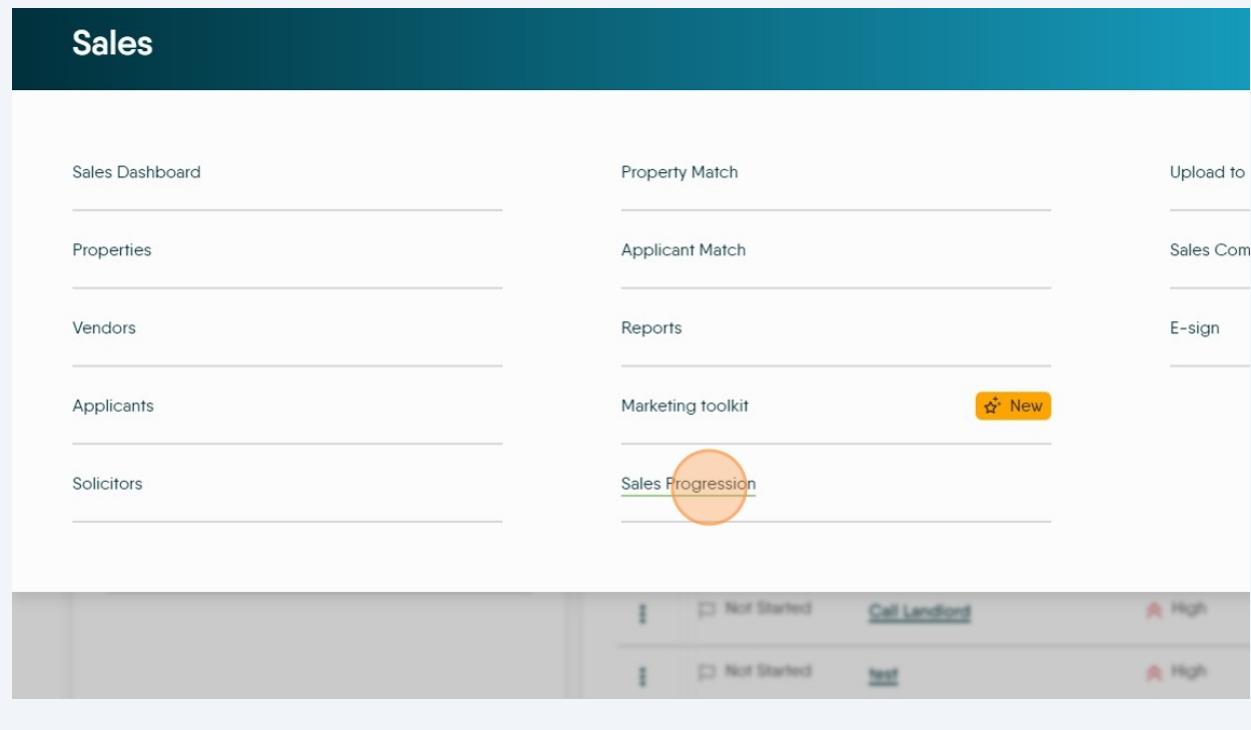
Accessing Sales Progression

 Tip! There are 3 ways to access the Sales Progression screen.

- 2 Click "Sales"

A screenshot of a web-based CRM application. At the top, there is a navigation bar with the "iam property" logo, followed by menu items: "My day", "Lettings", "Sales" (which is highlighted with a yellow circle), "Accounts", "Reporting", and "Communications". Below the navigation bar, a large, bold, dark teal text "Welcome back, Training" is displayed. At the bottom of the screen, there is a yellow button with a plus sign and the text "Add New Record", a green button with a clipboard icon and the text "View Property Management", and a blue button with a cloud icon and the text "Visit Help Centre". A search bar with the placeholder "Search all records" and a magnifying glass icon is located at the very bottom.

3 Click "Sales Progression"



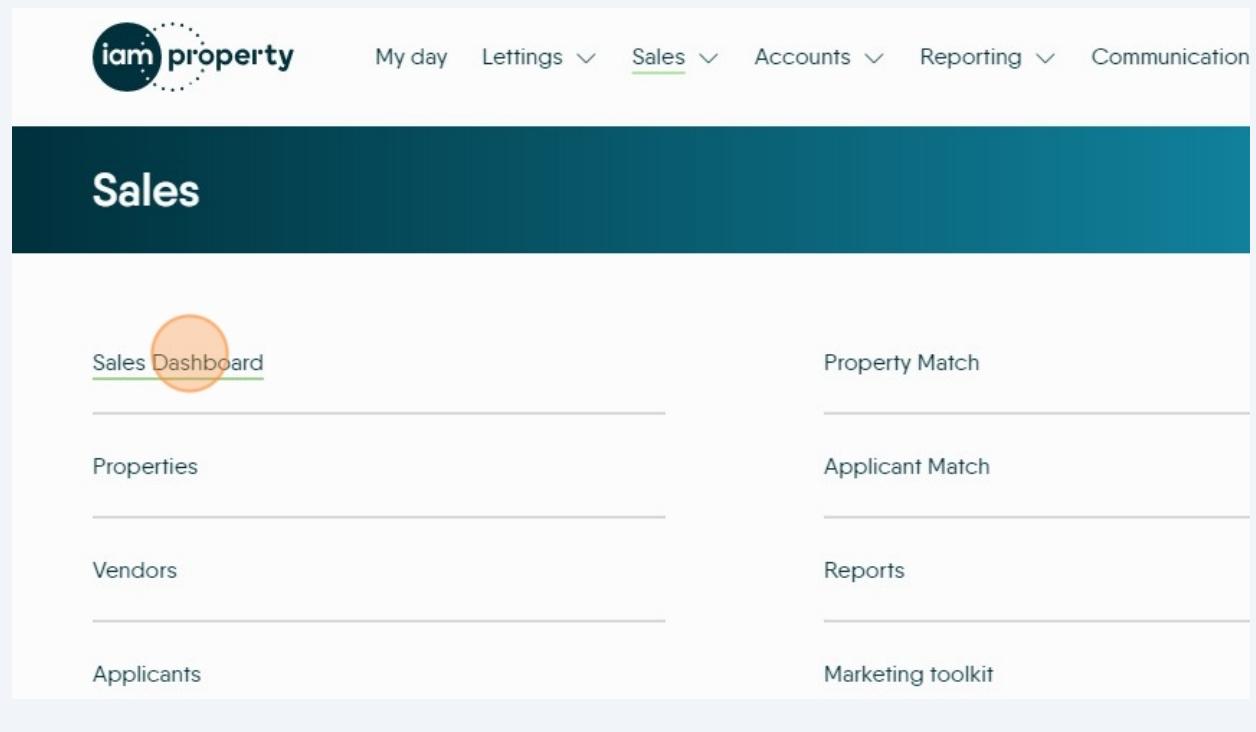
4 This will take you to the progression screen.

The screenshot shows the "Sales Progression" screen for a property transaction. The top bar includes links for iamproperty, CRM, movebutler, and iamsold, and a "My account" button.

The main area displays the following information:

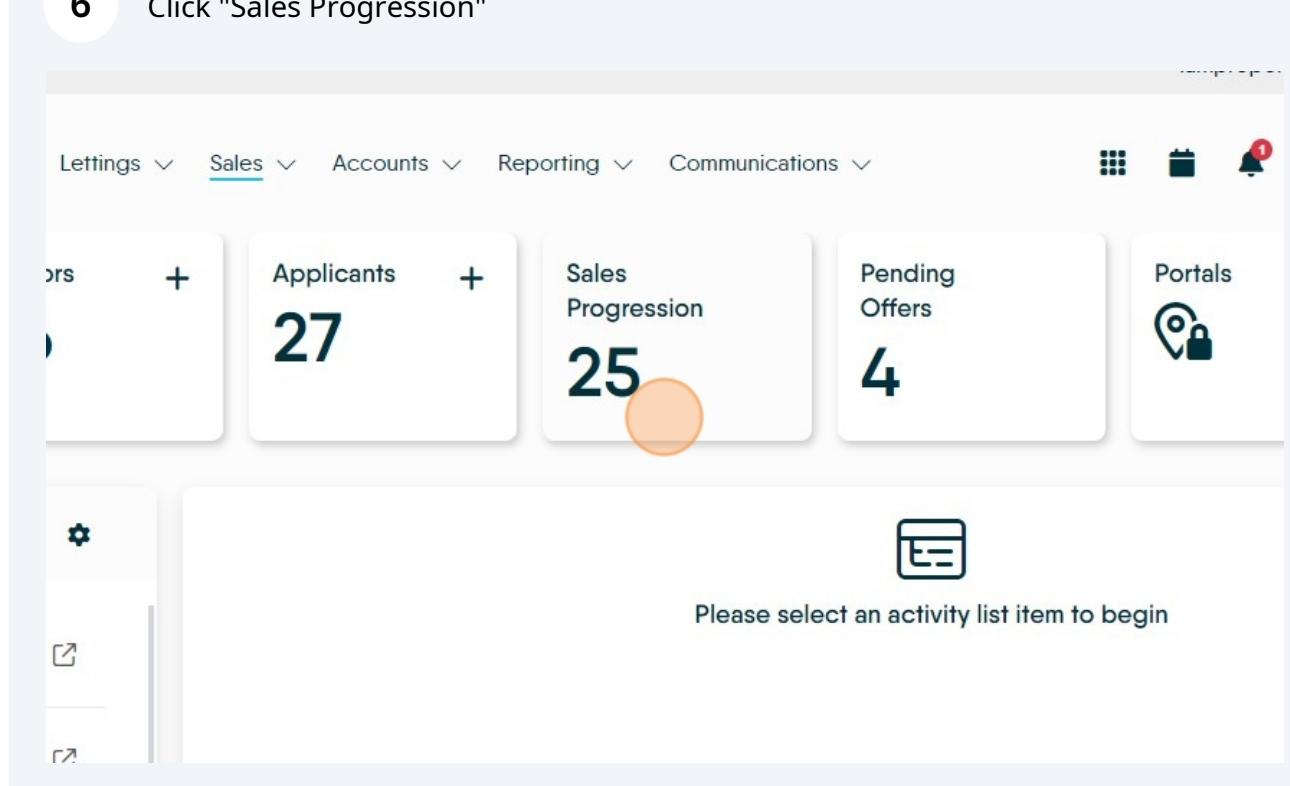
- SA Purchaser Sales Applicant11** and **SV Vendor Sales Vendor30 0132546889555**
- £140,000 - 4 Kingsway, Darlington, County Durham, DL1 3EY, UK**
- Timeline:** Offer Accepted 13/12/2024, Solicitor Instructed 16/12/2024, Searches Ordered, Mortgage Offer, Searches Back, Contracts Exchanged, Completed 13/03/2025.
- Conveyancing Journal Audit:** A list of tasks with dates and status (e.g., 15/12/2024, Date Done, CLEAR).
- Memorandum of Sale Sent:** Offer Accepted +3 days, 16/12/2024, Date Done, CLEAR.

5 Click "Sales Dashboard"



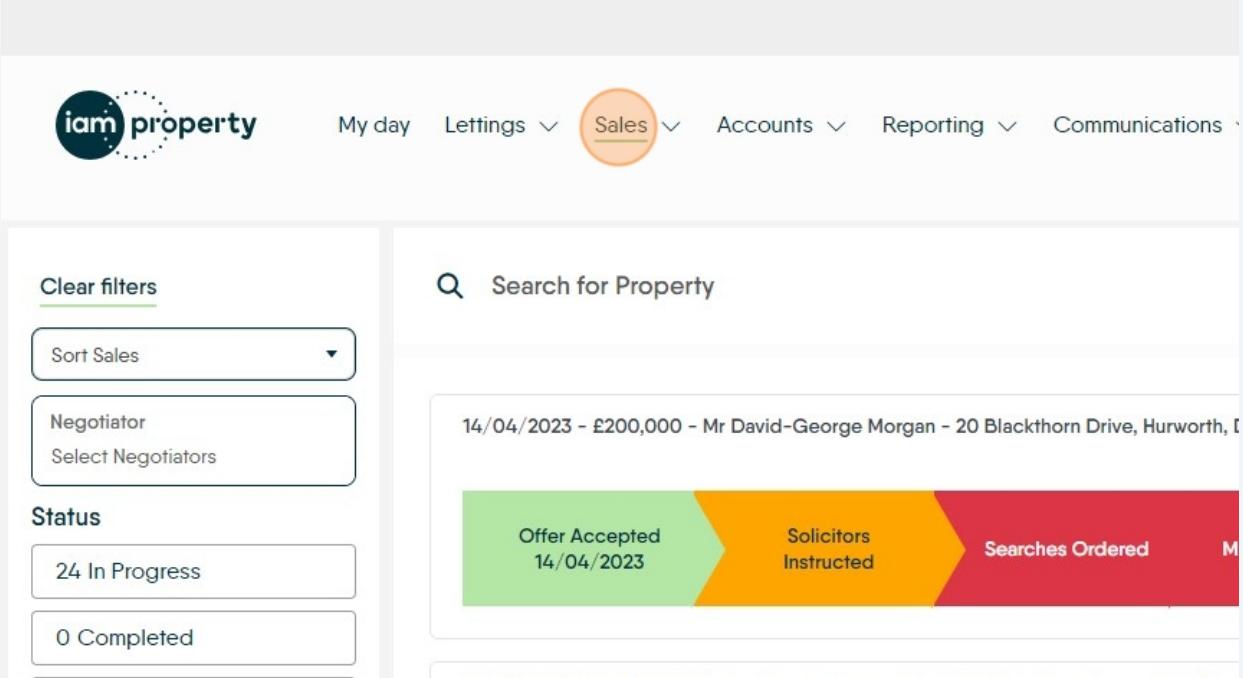
The screenshot shows the 'Sales' dashboard of the iam property platform. The top navigation bar includes links for 'My day', 'Lettings', 'Sales' (which is underlined and highlighted with an orange circle), 'Accounts', 'Reporting', and 'Communication'. The main content area has two columns. The left column contains links for 'Properties', 'Vendors', and 'Applicants'. The right column contains links for 'Property Match', 'Applicant Match', 'Reports', and 'Marketing toolkit'.

6 Click "Sales Progression"



The screenshot shows the 'Sales Progression' section of the dashboard. The top navigation bar includes links for 'Lettings', 'Sales' (underlined), 'Accounts', 'Reporting', and 'Communications'. Below the navigation are five cards: 'Leads' (2), 'Applicants' (27), 'Sales Progression' (25, highlighted with an orange circle), 'Pending Offers' (4), and 'Portals'. A message at the bottom of the section says 'Please select an activity list item to begin'. On the left side, there are three small icons: a gear, a magnifying glass, and a double arrow.

7 Alternatively, Click "Sales"
 Click "Properties"
 Click to select your property.
 Click "Offers"
 Click this link.



The screenshot shows the iam property software interface. At the top, there is a navigation bar with the logo 'iam property' and links for 'My day', 'Lettings', 'Sales' (which is highlighted with an orange circle), 'Accounts', 'Reporting', and 'Communications'. Below the navigation bar, there is a search bar labeled 'Search for Property' with a magnifying glass icon. To the left of the search bar, there are filter options: 'Clear filters', 'Sort Sales' (with a dropdown arrow), 'Negotiator' (with a 'Select Negotiators' button), and 'Status' (with buttons for '24 In Progress' and '0 Completed'). To the right of the search bar, there is a 'Sales Progression' bar showing the status of a transaction: 'Offer Accepted 14/04/2023' (green), 'Solicitors Instructed' (yellow), 'Searches Ordered' (red), and 'Marketing Toolkit' (purple). The main title 'Sales' is displayed in a large, bold, dark blue header. Below the header, there are several links: 'Properties' (underlined and highlighted with an orange circle), 'Vendors', 'Applicants', 'Solicitors', 'Property Match', 'Applicant Match', 'Reports', 'Marketing toolkit', and 'Sales Progression'.

Latest Added Favourites

Sales

Available



145,000
4 Kingsway, Darlington,
County Durham, DL13EY

3 Beds | 1 Bath | 2 Reception

Sales

Appraisal



0
1 Kingsway, Darlington,
County Durham, DL13EY

0 Beds | 0 Bath | 0 Reception

Sales

Appraisal



0
27 Kir
Coun

0 Beds

Rooms

Portals

Viewings

Offers

NOI

Enquiries

Key Control

4 Kingsway, Darlington, DL13EY | **Fixed Price £145,000**

3 | **1** **Available**

 Lead vendor:
[Mr Sales Vendor30](#)

View Vendors

Reference **Negotiator Training Dave**

PROPERTY PICTURES **Upload**



Status

- Accepted (1)
- Declined (0)
- Fallen Through (0)
- Pending (0)
- Under Offer (0)
- Withdrawn (0)

Mr Sales Applicant2
zagg.dave@gmail.com
078546469

View Sales Applicant2

Progress Info Lining Dave

i

View Offer History

8 This will take you to the Progression screen (as above)

iamproperty CRM movebutler iamsold

My day Lettings Sales Accounts Reporting Communications

My account

SA Purchaser Sales Applicant11

£140,000 - 4 Kingsway, Darlington, County Durham, DL1 3EY, UK

Vendor Sales Vendor30 SV

← Previous Sale Next Sale →

Conveyancing

Offer Accepted 13/12/2024

Solicitor Instructed 16/12/2024

Searches Ordered

Mortgage Offer

Searches Back

Contracts Exchanged

Completed 13/03/2025

Sellers
Seller's solicitor Instructed
Offer Accepted
+2 days

Buyers
Buyers' solicitor Instructed
Offer Accepted
+2 days

Memorandum of Sale Sent
Offer Accepted
+3 days

15/12/2024 CLEAR

Date Done CLEAR

15/12/2024 CLEAR

Date Done CLEAR

16/12/2024 CLEAR

Date Done CLEAR

9

Once in the Progression screen, complete all the fields as required. There are some of the progression items that cannot be completed until a previous option is completed. These are the Yellow fields, as an example if the screen shown, the 'Memorandum of Sale Sent' field needs to be completed before the 'Searches Ordered' field can be completed. You can add notes to these fields and the estimated date.

| | | |
|--|---------------|-------|
| Memorandum of Sale Sent Offer Accepted +3 days | 16/12/2024 | CLEAR |
| Solicitor pack sent No Estimate | Date Estimate | CLEAR |
| Solicitor pack complete No Estimate | Date Estimate | CLEAR |
| Mortgage Survey Offer Accepted +9 days | 22/12/2024 | CLEAR |
| Buildings Survey No Estimate | Date Estimate | CLEAR |
| Searches Ordered No Estimate | Date Estimate | CLEAR |
| Mortgage Offer No Estimate | Date Estimate | CLEAR |

Adding a Chain

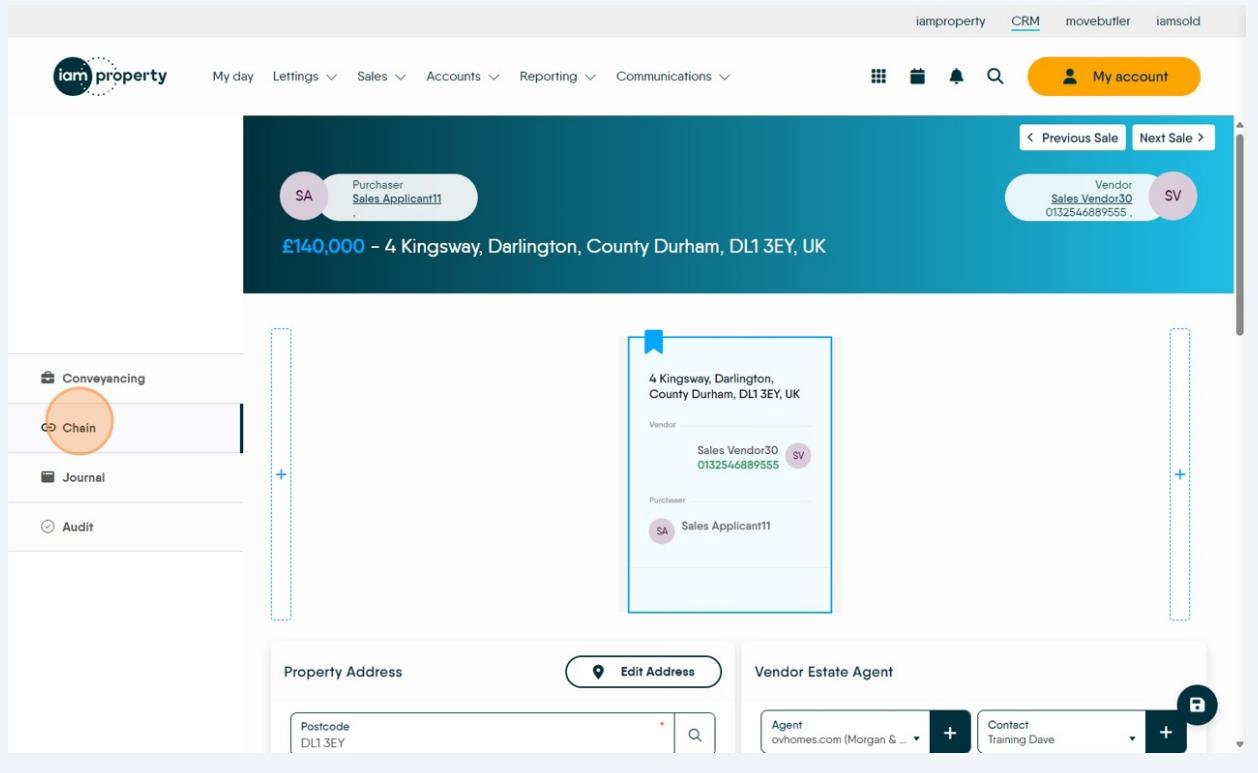
10

To add to the chain, Click "Chain". The chains can be as long as you require and have the information to complete.

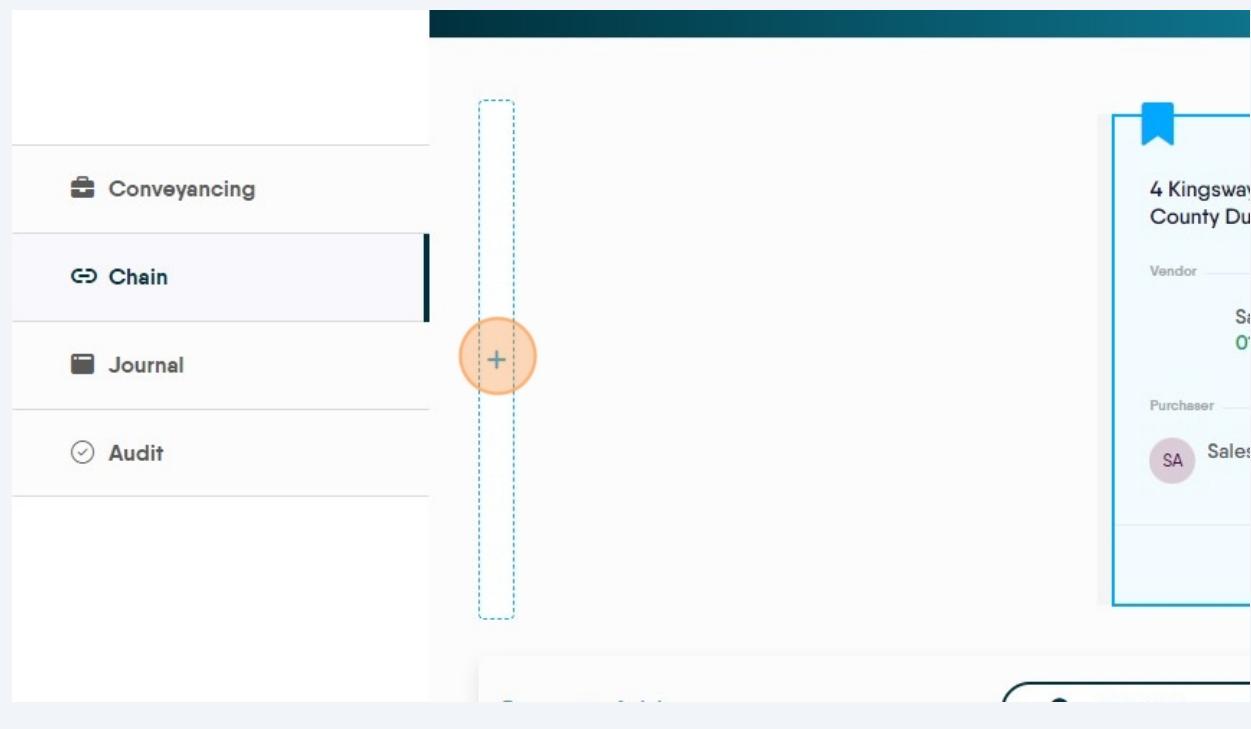


11

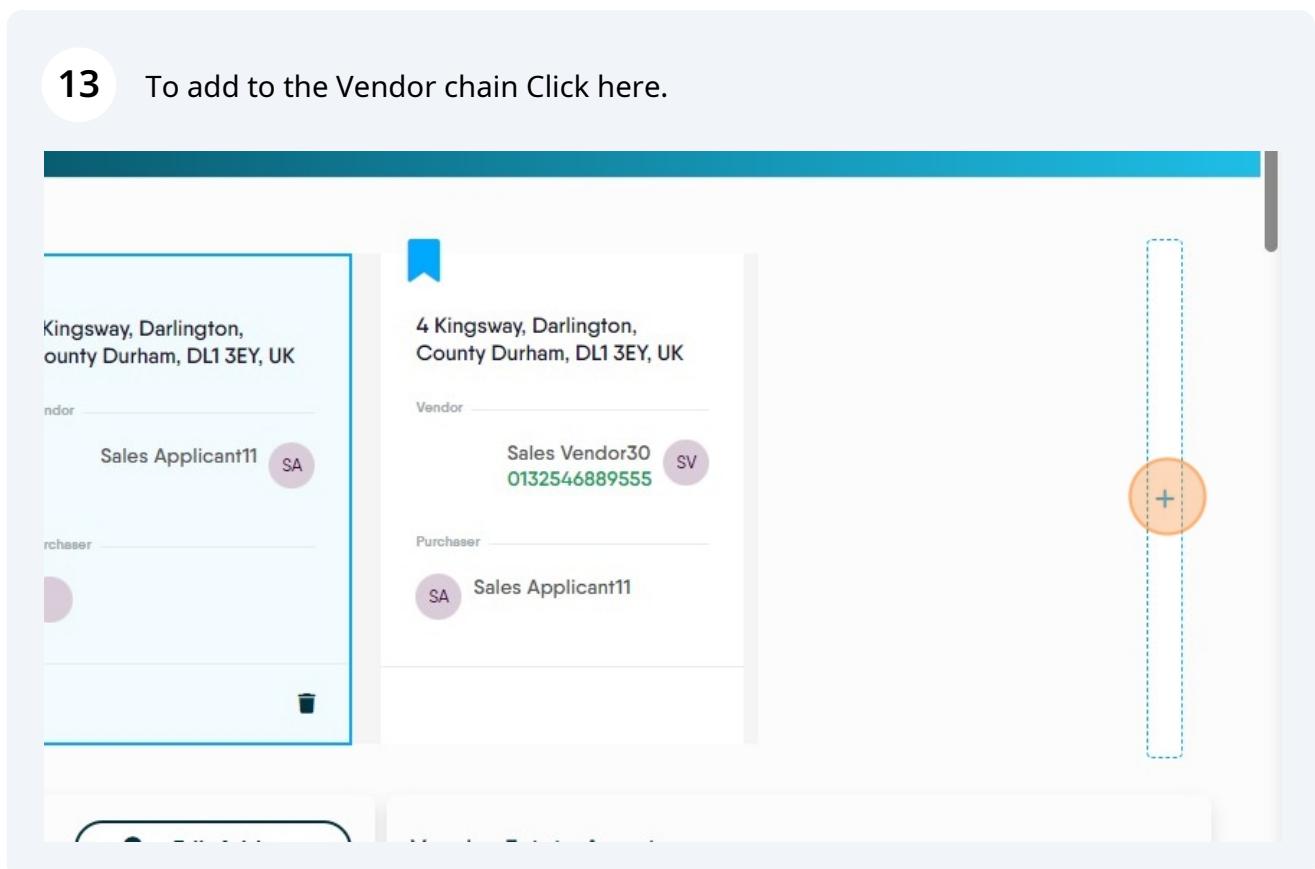
From this screen you can complete the fields as required.



12 To add to the purchasers chain Click here.



13 To add to the Vendor chain Click here.



Journal

14 The progression has its own journal. Click "Journal"

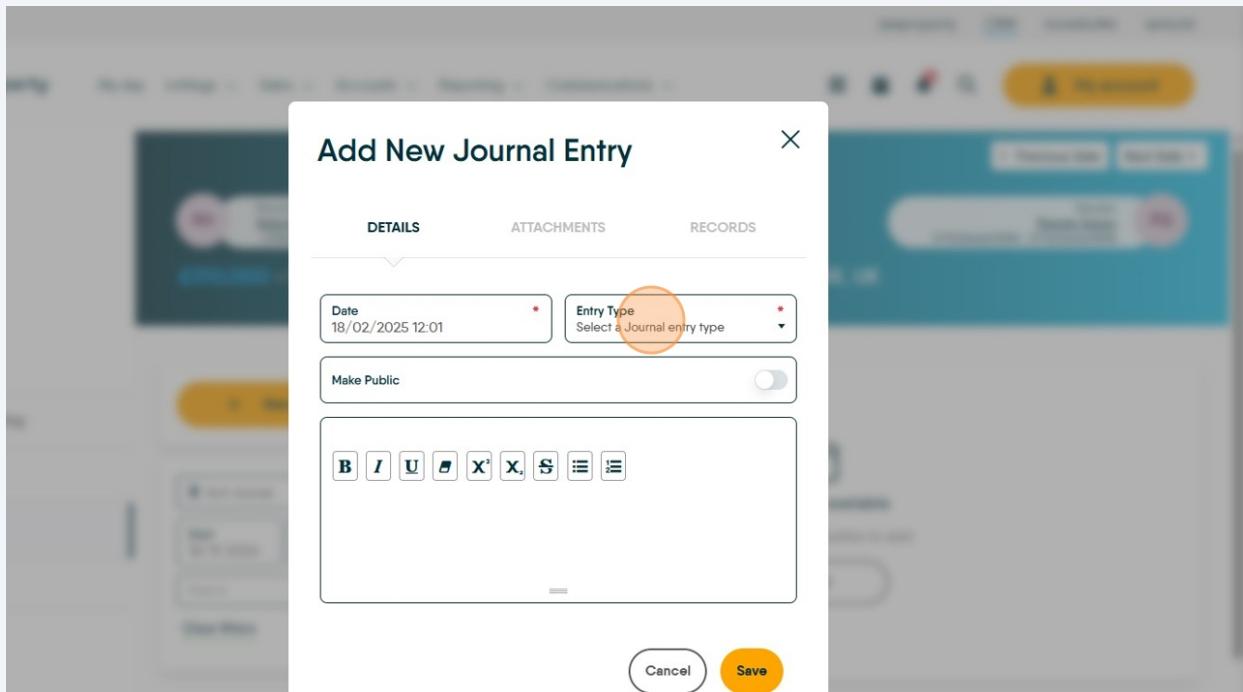
The screenshot shows a software interface for a conveyancing matter. At the top, it displays the property details: "£310,000 - 97 Yew Tree Close, Hurworth, Darlington, Durham, DL2 2HX, UK". Below this, the "Conveyancing" tab is selected. A "Journal" button is highlighted with a yellow circle. The journal table shows the following entries:

| Event | Details | Date |
|------------------------------|------------|---------------|
| Offer Accepted | 26/07/2023 | |
| Solicitor Instructed | 09/08/2023 | |
| Searches Ordered | 09/08/2023 | |
| Mortgage Offer | | |
| Searches Back | | |
| Contracts Exchanged | | |
| Sellers solicitor Instructed | hhbsfhs | 23/07/2023 |
| Offer Accepted | +2 days | 09/08/2023 |
| Buyers Solicitor Instructed | | 23/07/2023 |
| Offer Accepted | +2 days | Date Done |
| Memorandum of Sale Sent | | 24/07/2023 |
| Offer Accepted | +3 days | 09/08/2023 |
| Solicitor pack | | Date Estimate |

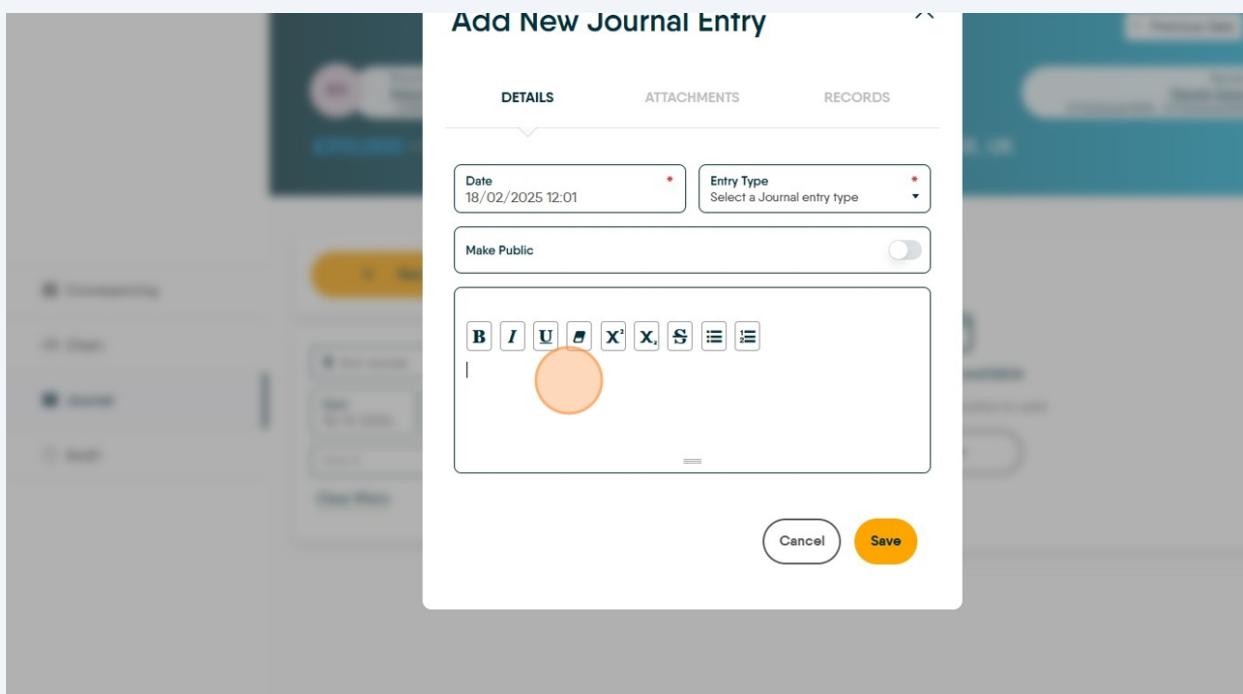
15 Click "New Journal"

The screenshot shows the same software interface as the previous one, but the "Journal" button is now highlighted with a yellow circle. The "New Journal" button is also highlighted with a yellow circle. The journal table on the right shows the message: "No journals available. Please click the button to add." A "Start" button is visible below the message.

16 Click "Select a Journal entry type" from the drop down menu.

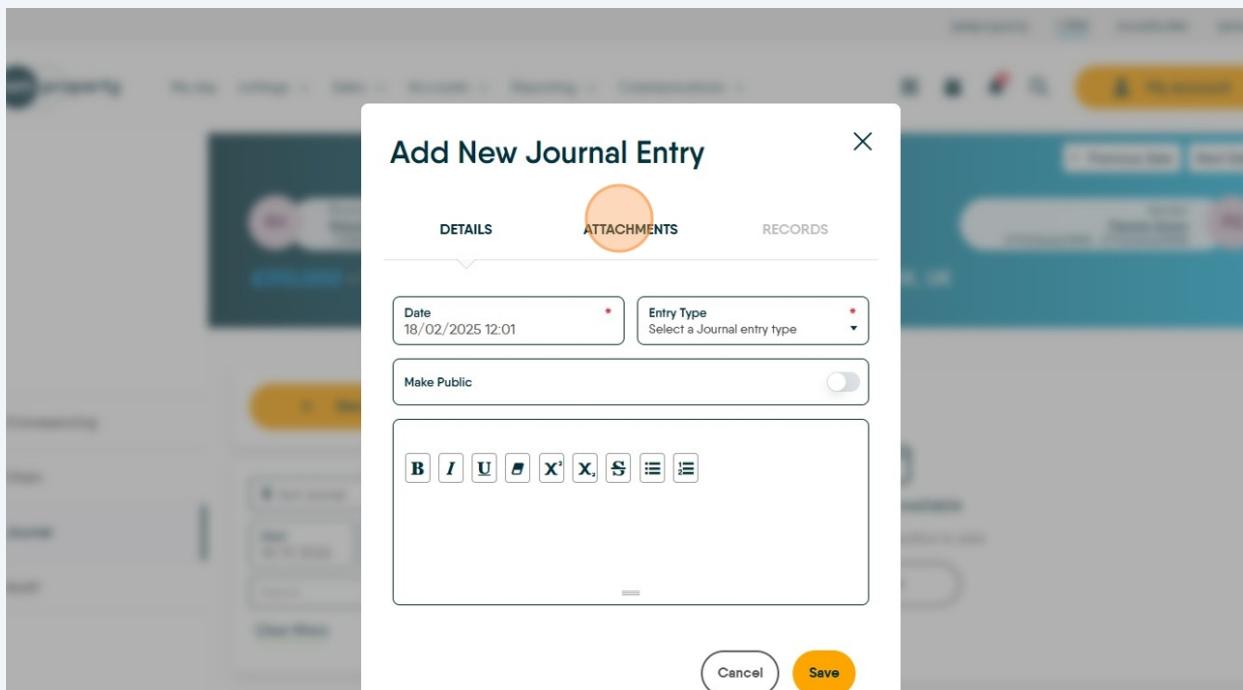


17 Add in the details for the journal entry



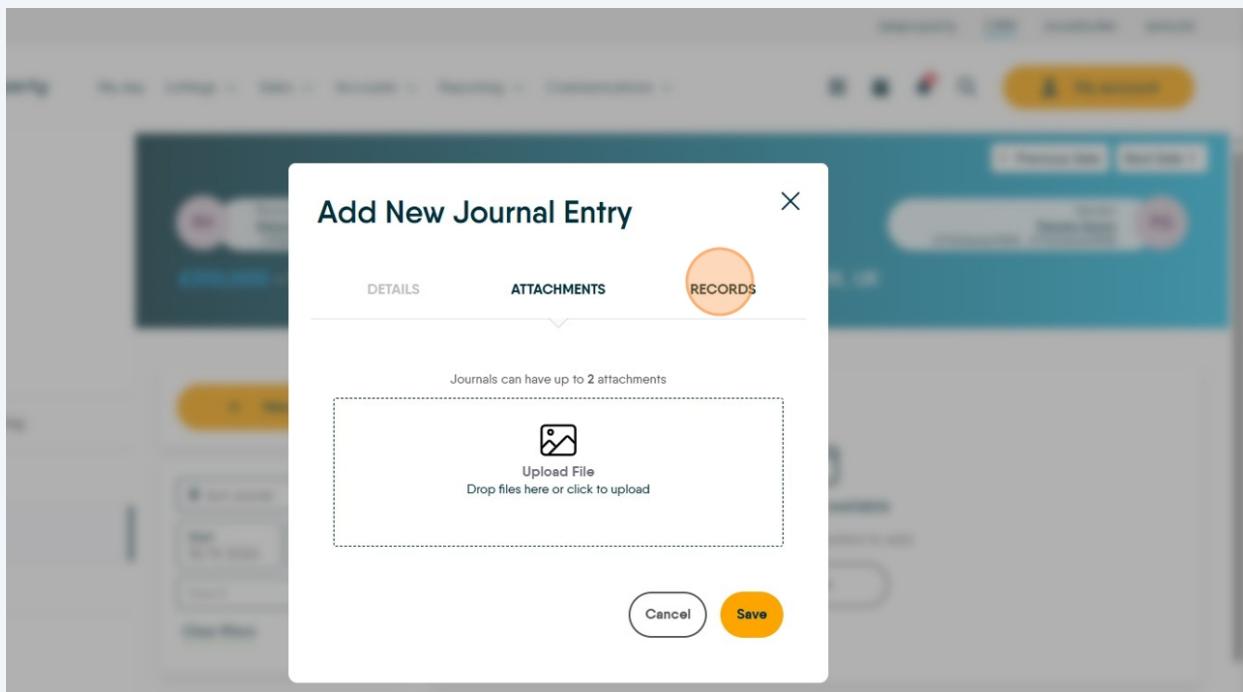
18

Click "ATTACHMENTS" this will allow you to add 2 additional documents to the journal entry.



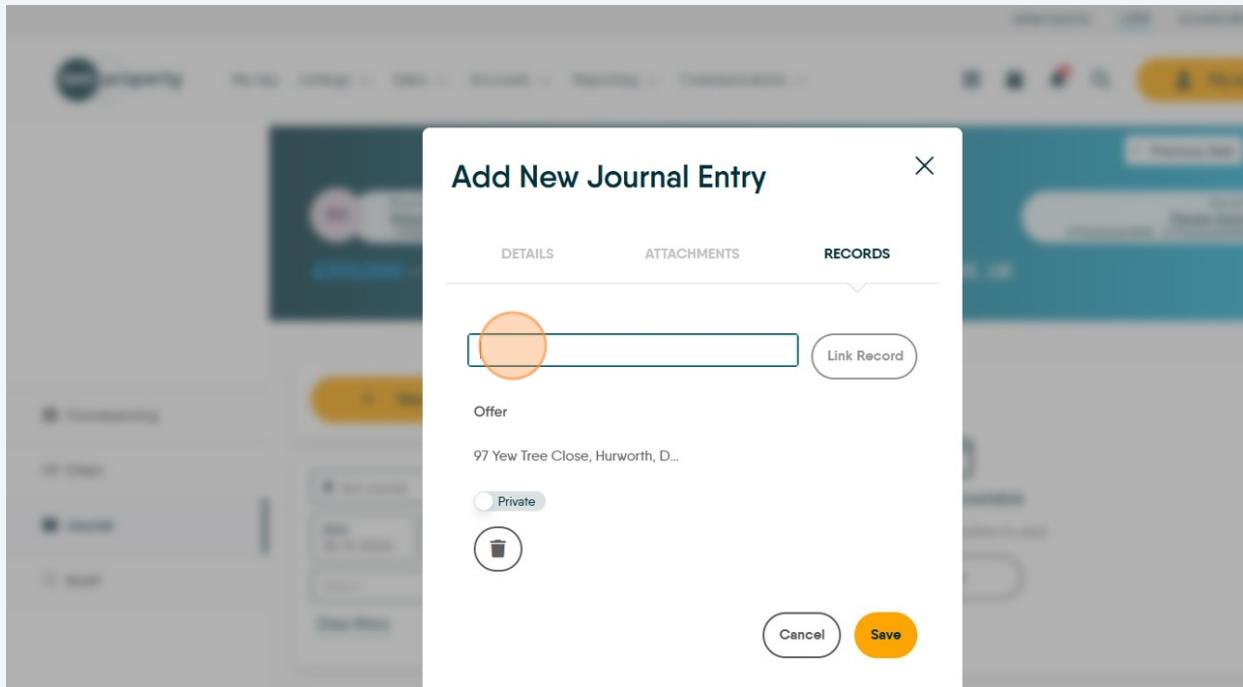
19

Click "RECORDS"



20

Click this text field. This will allow you to see which records the journal is linked to and also to link this journal to other records e.g. you might want to link a record in a journal to a Vendor, this means the journal entry will show in the Vendor journal.



21

Click "Save"

