

Viewing Sales Progression for a Property in CRM



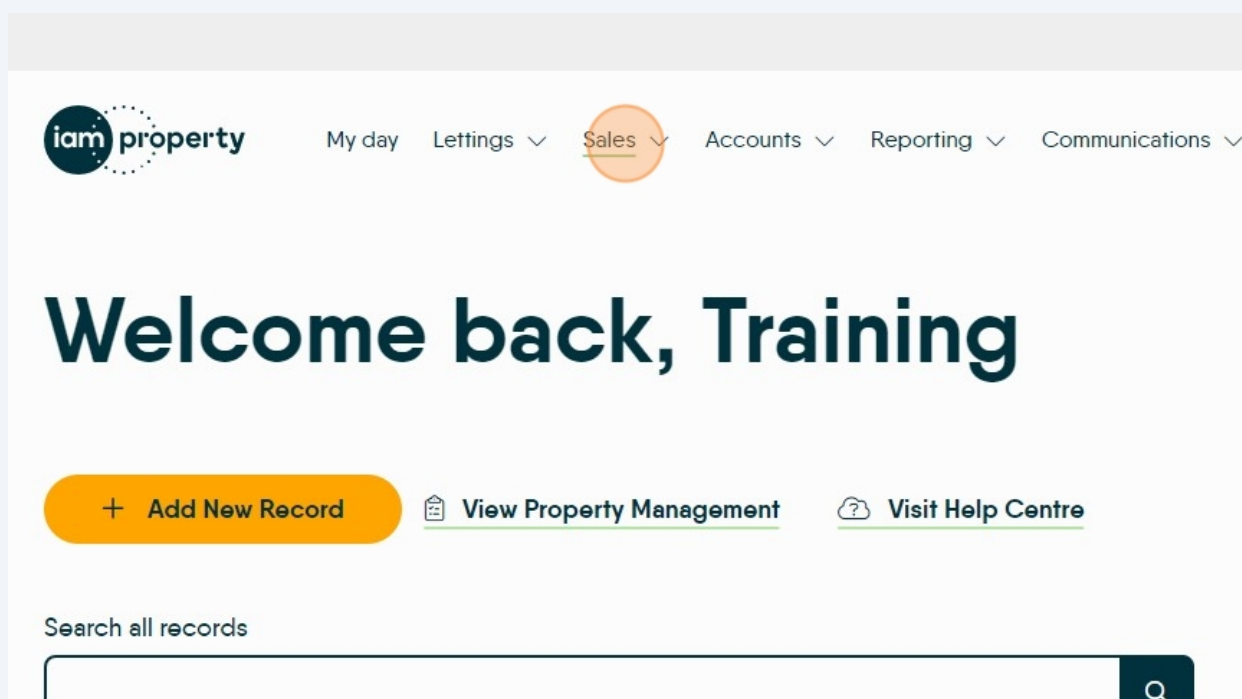
This guide provides a comprehensive overview of how to view and manage sales progression for a property within the CRM system. It outlines multiple methods to access the Sales Progression screen, ensuring users can choose the most convenient option for their needs. Additionally, it details how to complete 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>

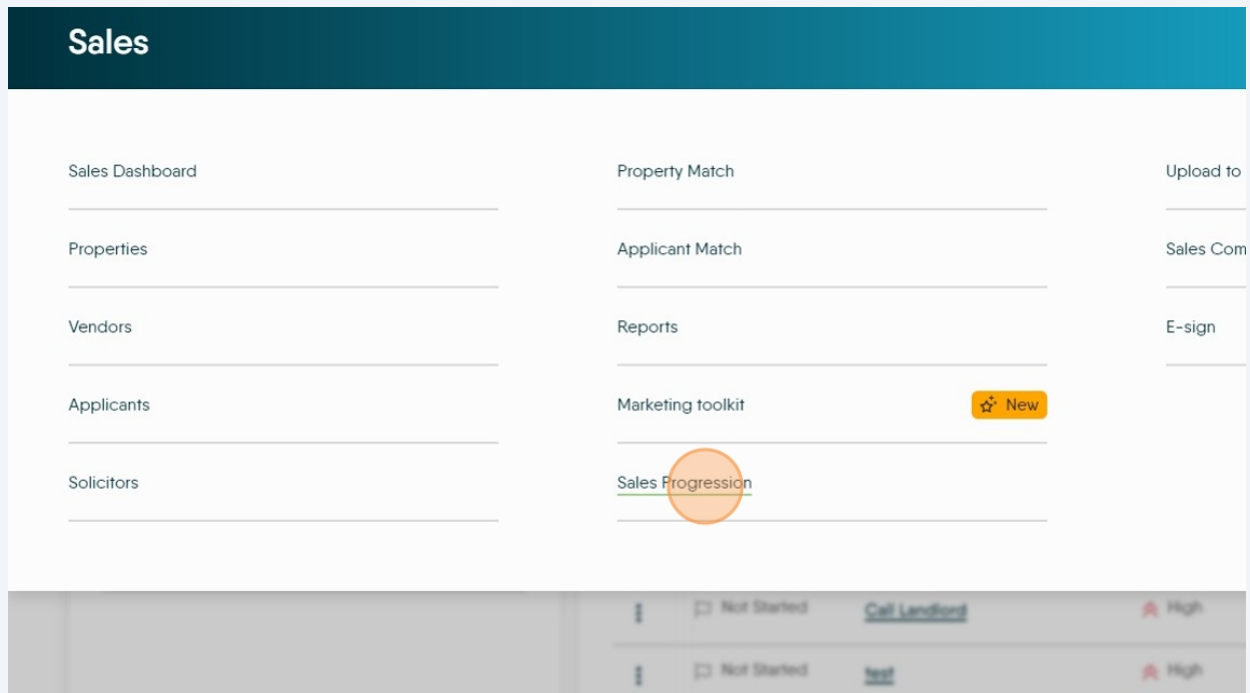
Accessing Sales Progression

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

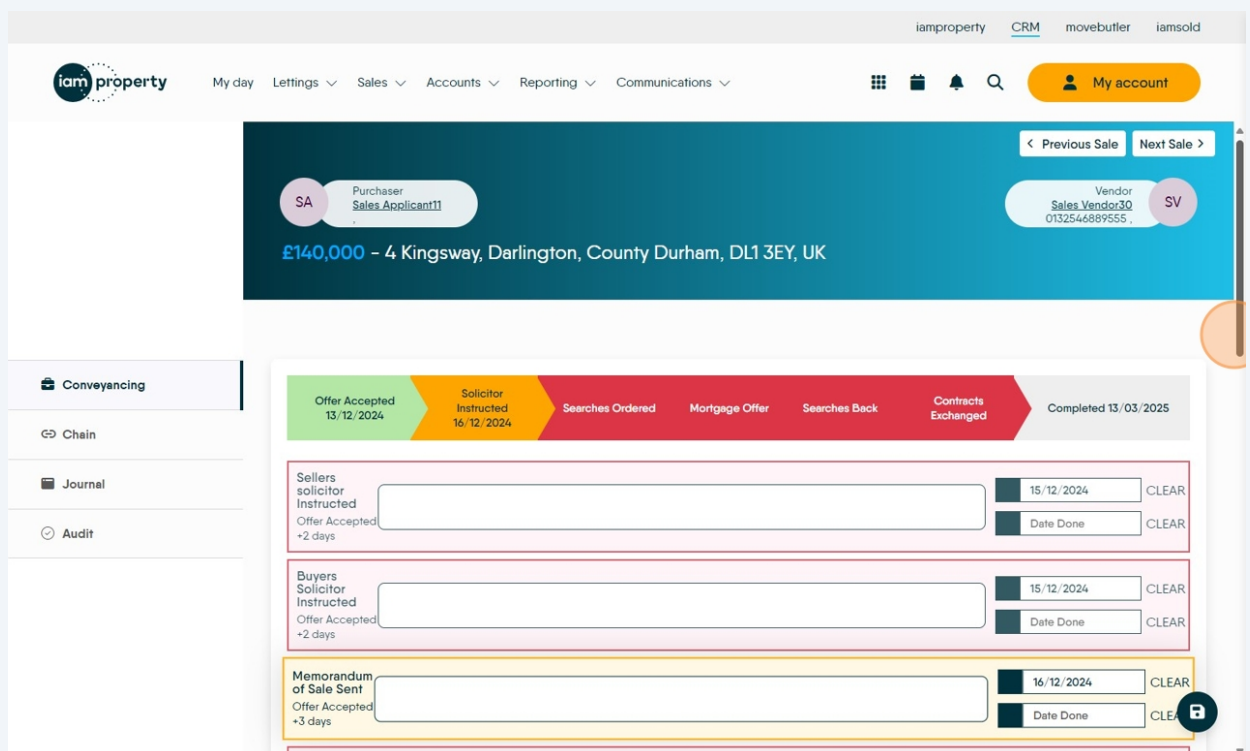
- 2 Click "Sales"



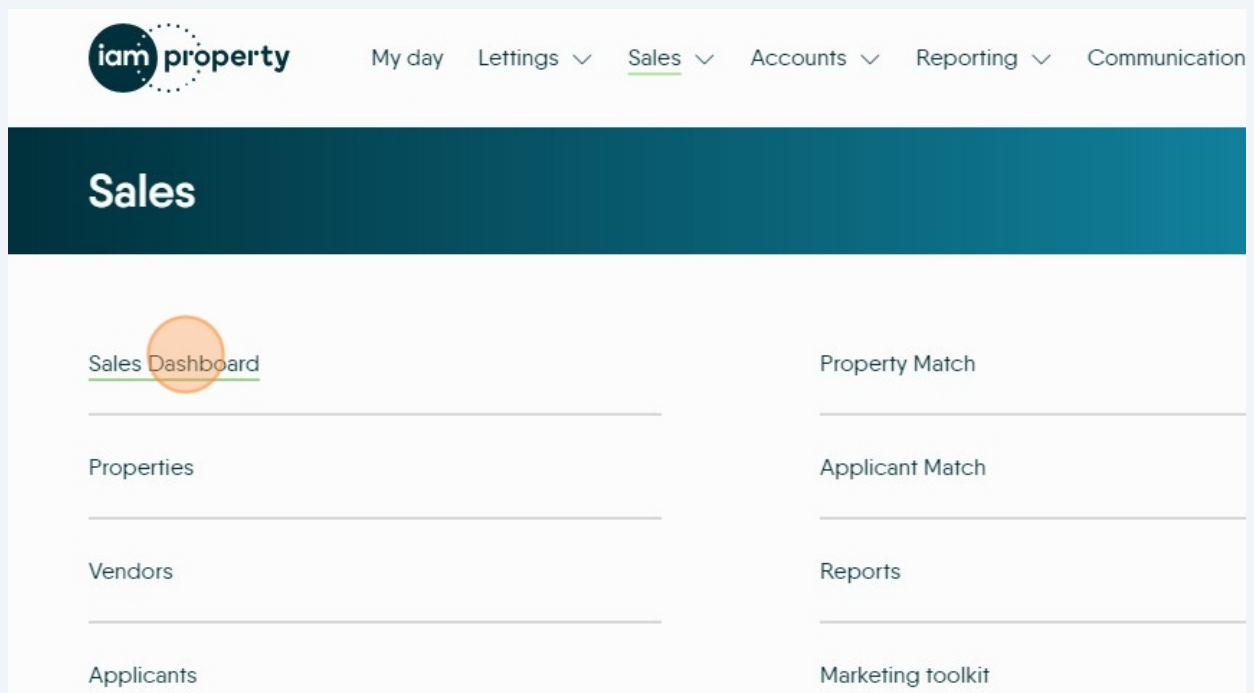
3 Click "Sales Progression"



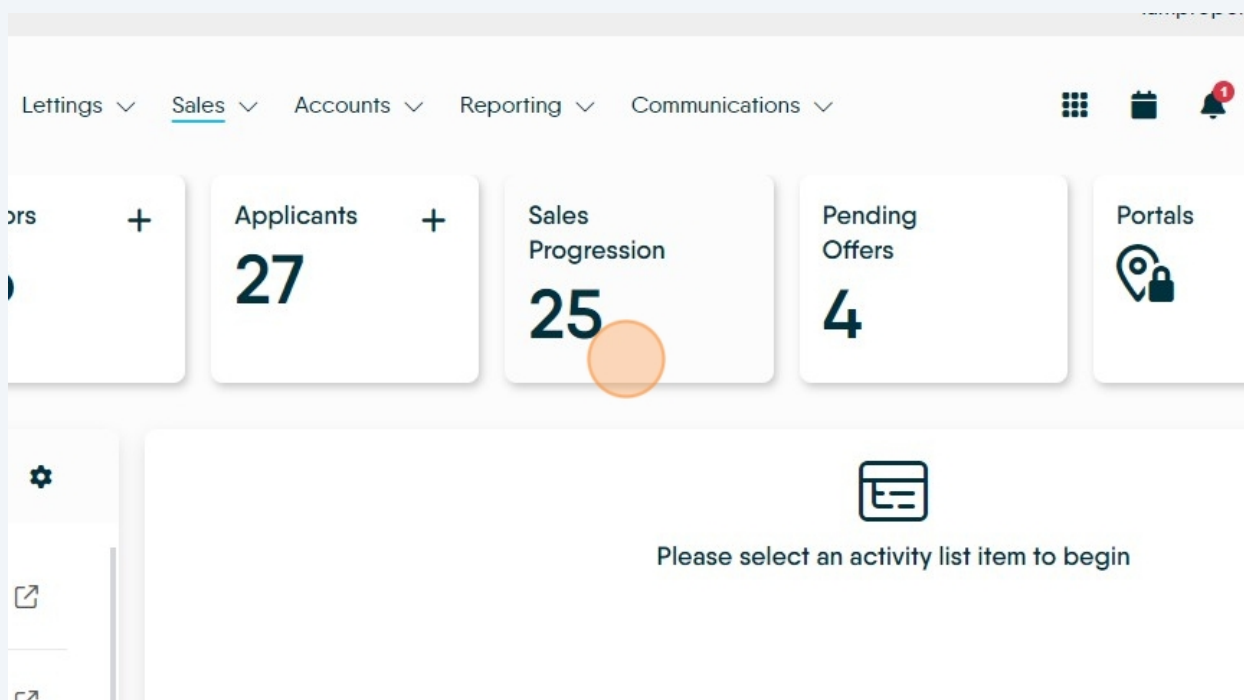
4 This will take you to the progression screen.



5 Click "Sales Dashboard"



6 Click "Sales Progression"



7

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

The screenshot displays the 'iam property' dashboard. At the top, the navigation bar includes 'My day', 'Lettings', 'Sales' (highlighted with an orange circle), 'Accounts', 'Reporting', and 'Communications'. On the left sidebar, under 'Clear filters', there are sections for 'Sort Sales' (a dropdown menu), 'Negotiator' (a button labeled 'Select Negotiators'), and 'Status' (two buttons: '24 In Progress' and '0 Completed'). The main content area features a 'Search for Property' search bar. Below it, a property listing is shown: '14/04/2023 - £200,000 - Mr David-George Morgan - 20 Blackthorn Drive, Hurworth, L'. A progress bar for this property shows three stages: 'Offer Accepted 14/04/2023' (green), 'Solicitors Instructed' (orange), and 'Searches Ordered' (red). Below the progress bar, the text 'M' is visible. At the bottom of the dashboard, a dark blue header reads 'Sales'. Below this header, there are two columns of links. The left column contains 'Sales Dashboard', 'Properties' (highlighted with an orange circle), 'Vendors', 'Applicants', and 'Solicitors'. The right column contains 'Property Match', 'Applicant Match', 'Reports', 'Marketing toolkit', and 'Sales Progression' (underlined).

iam property

My day Lettings Sales Accounts Reporting Communications

Clear filters

Sort Sales

Negotiator
Select Negotiators

Status

24 In Progress

0 Completed

Search for Property

14/04/2023 - £200,000 - Mr David-George Morgan - 20 Blackthorn Drive, Hurworth, L

Offer Accepted
14/04/2023

Solicitors
Instructed

Searches Ordered

M

Sales

Sales Dashboard

Properties

Vendors

Applicants

Solicitors

Property Match

Applicant Match

Reports

Marketing toolkit

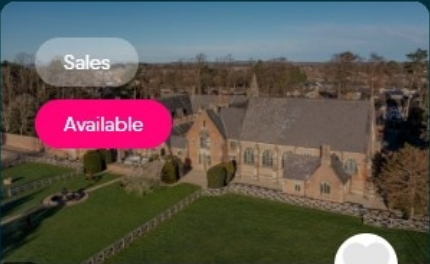
Sales Progression

Latest Added

Favourites

Sales

Available



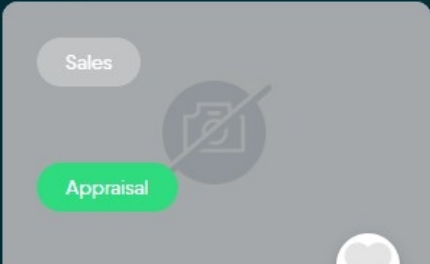
145,000

4 Kingsway, Darlington, County Durham, DL1 3EY

3 Beds | 1 Bath | 2 Reception

Sales

Appraisal



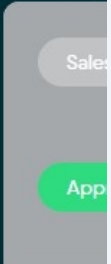
0

1 Kingsway, Darlington, County Durham, DL13EY

0 Beds | 0 Bath | 0 Reception

Sales

App



0

27 Kir Coun

0 Beds

- Rooms
- Rooms
- Portals
- Viewings
- Offers
- NOI
- Enquiries
- Key Control

4 Kingsway, Darlington, DL1 3EY

Fixed Price £145,000

3

1

Available

Lead vendor:

Mr Sales Vendor30

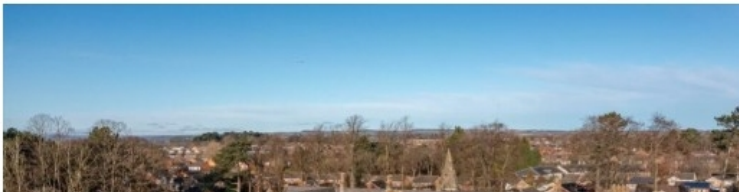
View Vendors

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](tel:078546469)

[View Sales Applicant2](#)

Progress
Info

aining Dave



[View Offer History](#)

8

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

iamproperty

CRM

movebutler

iamsold

iamproperty

My day

Lettings

Sales

Accounts

Reporting

Communications

My account

SA

Purchaser

Sales Applicant11

Vendor

Sales Vendor30

0132546889555

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

Conveyancing

Chain

Journal

Audit

Offer Accepted
13/12/2024

Solicitor Instructed
16/12/2024

Searches Ordered

Mortgage Offer

Searches Back

Contracts Exchanged

Completed 13/03/2025

Sellers solicitor Instructed

Offer Accepted +2 days

15/12/2024

CLEAR

Date Done

CLEAR

Buyers Solicitor Instructed

Offer Accepted +2 days

15/12/2024

CLEAR

Date Done

CLEAR

Memorandum of Sale Sent

Offer Accepted +3 days

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	<input type="text"/>	16/12/2024	CLEAR
		Date Done	CLEAR
Solicitor pack sent No Estimate	<input type="text"/>	Date Estimate	CLEAR
		Date Done	CLEAR
Solicitor pack complete No Estimate	<input type="text"/>	Date Estimate	CLEAR
		Date Done	CLEAR
Mortgage Survey Offer Accepted +9 days	<input type="text"/>	22/12/2024	CLEAR
		Date Done	CLEAR
Buildings Survey No Estimate	<input type="text"/>	Date Estimate	CLEAR
		Date Done	CLEAR
Searches Ordered No Estimate	<input type="text"/>	Date Estimate	CLEAR
		Date Done	CLEAR
Mortgage Offer No Estimate	<input type="text"/>	Date Estimate	CLEAR
		Date Done	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.

Conveyancing

Chain

Journal

Audit

Solicitor pack sent
No Estimate

Solicitor pack complete
No Estimate

Mortgage Survey
Offer Accepted
+9 days

Buildings Survey
No Estimate

Searches Ordered

11

From this screen you can complete the fields as required.

iam property CRM movebutler iamsold

My day Lettings Sales Accounts Reporting Communications

My account

Purchaser Sales Applicant11

Vendor Sales Vendor30 013254689555

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

4 Kingsway, Darlington, County Durham, DL1 3EY, UK

Vendor Sales Vendor30 013254689555

Purchaser Sales Applicant11

Property Address Edit Address

Postcode DL1 3EY

Vendor Estate Agent

Agent ovhomes.com (Morgan & ...) Contact Training Dave

12 To add to the purchasers chain Click here.

The screenshot shows a mobile application interface. On the left is a sidebar menu with four items: 'Conveyancing' (briefcase icon), 'Chain' (link icon, highlighted with a purple bar), 'Journal' (book icon), and 'Audit' (checkmark icon). In the center of the screen is a vertical dashed rectangular box containing an orange circle with a white plus sign. On the right is a card titled '4 Kingsway County Du' with a blue bookmark icon at the top. The card has three sections: 'Vendor' with a blank line, 'Purchaser' with a blank line, and 'Sales' with a purple circle containing 'SA'.

13 To add to the Vendor chain Click here.

The screenshot shows a mobile application interface with two cards side-by-side. Both cards have the address '4 Kingsway, Darlington, County Durham, DL1 3EY, UK' at the top. The left card has a blue bookmark icon and fields for 'Vendor' (Sales Applicant11, SA) and 'Purchaser' (blank). The right card has a blue bookmark icon and fields for 'Vendor' (Sales Vendor30, 0132546889555, SV) and 'Purchaser' (Sales Applicant11, SA). In the center of the screen is a vertical dashed rectangular box containing an orange circle with a white plus sign.

Journal

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

Conveyancing

Chain

Journal

Audit

RH

Purchaser
Robert Hick
07894123123

Vendc
Pamela Gree
0712324567898, 071232456789

£310,000 - 97 Yew Tree Close, Hurworth, Darlington, Durham, DL2 2HX, UK

Offer Accepted
26/07/2023

Solicitor Instructed
09/08/2023

Searches Ordered
09/08/2023

Mortgage Offer

Searches Back

Contracts Exchanged

Conveyancing

Sellers solicitor Instructed
Offer Accepted +2 days

hhhsfhs

23/07/2023

09/08/2023

Buyers Solicitor Instructed
Offer Accepted +2 days

23/07/2023

Date Done

Memorandum of Sale Sent
Offer Accepted +3 days

24/07/2023

09/08/2023

Solicitor pack

Date Estimate

15 Click "New Journal"

iam property

My day Lettings Sales Accounts Reporting Communications

Grid

Calendar

Notifications

Search

My account

< Previous Sale

RH

Purchaser
Robert Hick
07894123123

Vendc
Pamela Gree
0712324567898, 071232456789

£310,000 - 97 Yew Tree Close, Hurworth, Darlington, Durham, DL2 2HX, UK

+ New Journal

Sort Journal

Start
18/11/2024

End
18/02/2025

Search

Clear filters

No journals available

Please click the button to add.

Start

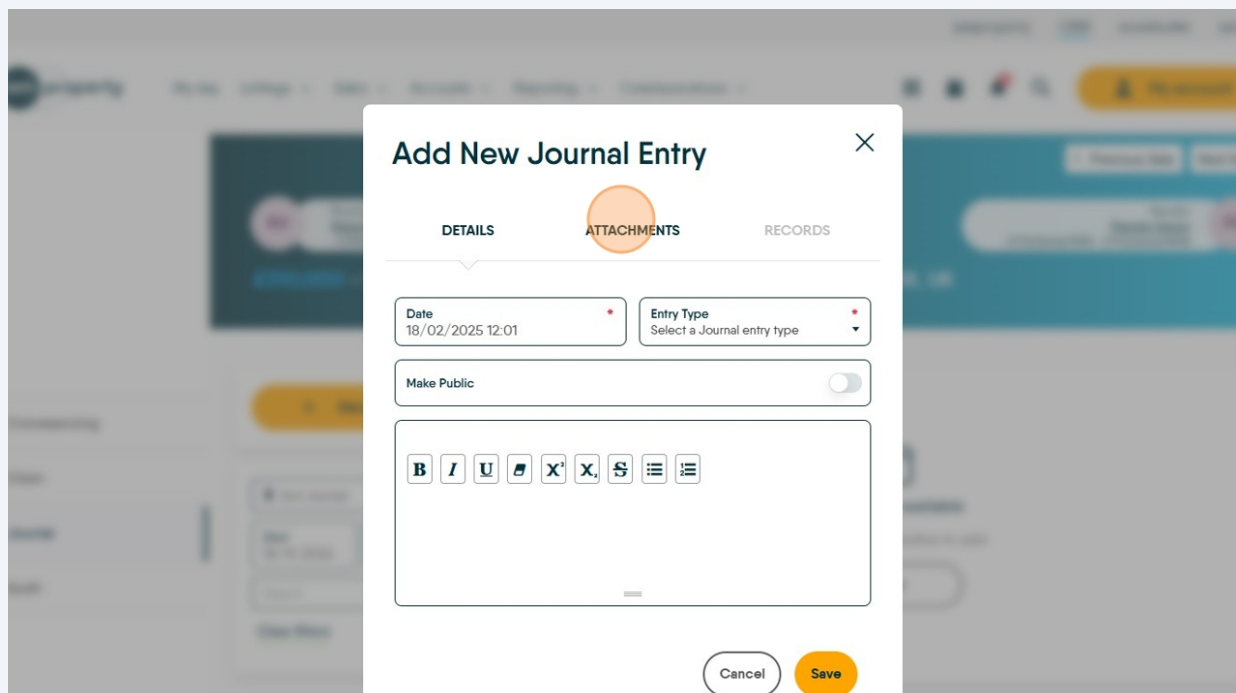
- 16 Click "Select a Journal entry type" from the drop down menu.

The screenshot shows a modal window titled "Add New Journal Entry" with a close button (X) in the top right corner. The modal has three tabs: "DETAILS", "ATTACHMENTS", and "RECORDS", with "DETAILS" being the active tab. Inside the "DETAILS" tab, there are three main sections: a "Date" field with the value "18/02/2025 12:01", an "Entry Type" dropdown menu with the placeholder text "Select a Journal entry type", and a "Make Public" toggle switch. Below these is a rich text editor with a toolbar containing icons for bold (B), italic (I), underline (U), link (chain), unlink (chain with slash), strikethrough (ABC), bulleted list (list), and numbered list (list). The "Entry Type" dropdown menu is highlighted with an orange circle, indicating the next step in the process.

- 17 Add in the details for the journal entry

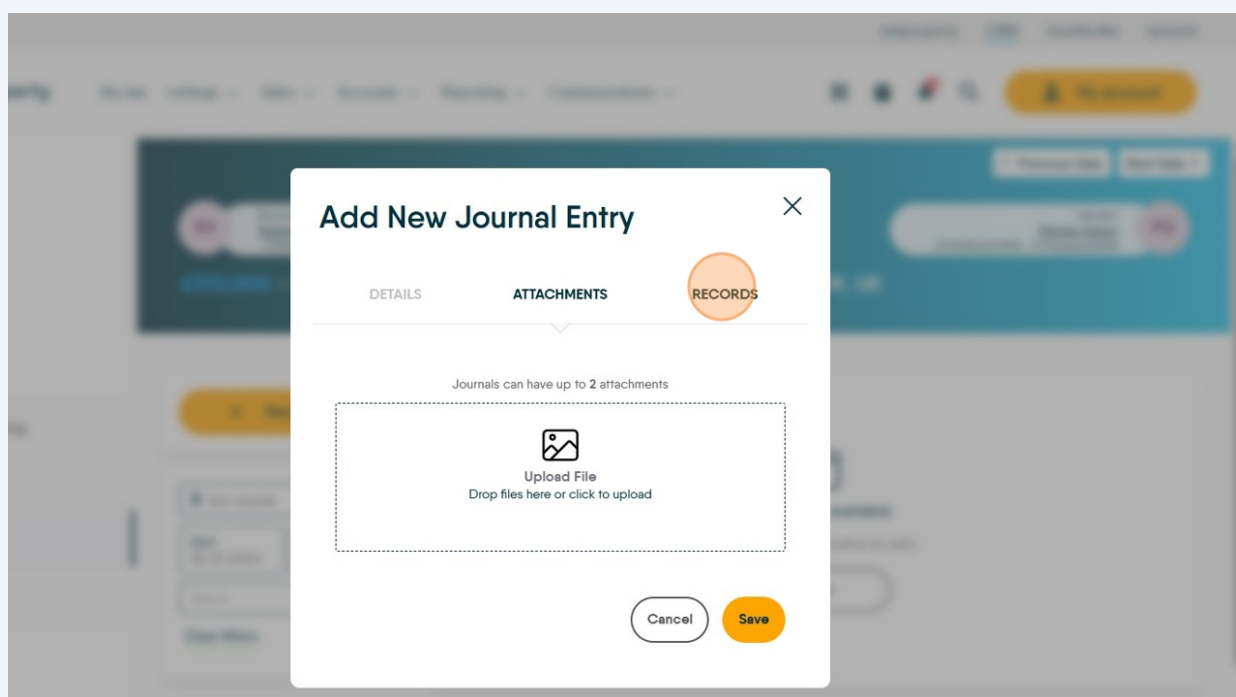
The screenshot shows the same "Add New Journal Entry" modal window. In this step, the rich text editor is highlighted with an orange circle, indicating where the user should add details for the journal entry. The "Date" field still shows "18/02/2025 12:01", and the "Entry Type" dropdown menu remains unchanged. The "Make Public" toggle switch is also visible. The rich text editor's toolbar and content area are clearly visible, with the orange circle placed at the beginning of the text area.

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



The screenshot shows a modal window titled "Add New Journal Entry" with a close button (X) in the top right corner. The modal has three tabs: "DETAILS", "ATTACHMENTS", and "RECORDS". The "ATTACHMENTS" tab is currently selected and highlighted with an orange circle. Below the tabs, there are two input fields: "Date" with the value "18/02/2025 12:01" and "Entry Type" with a dropdown menu showing "Select a Journal entry type". Below these fields is a "Make Public" toggle switch. Underneath is a rich text editor with various formatting icons (bold, italic, underline, link, unlink, bulleted list, numbered list, indent, outdent). At the bottom of the modal are "Cancel" and "Save" buttons.

- 19 Click "RECORDS"



The screenshot shows the same "Add New Journal Entry" modal window, but now the "RECORDS" tab is selected and highlighted with an orange circle. The "DETAILS" and "ATTACHMENTS" tabs are visible but not selected. The content area of the modal displays the text "Journals can have up to 2 attachments" above a dashed rectangular box. Inside this box is an "Upload File" icon (a picture of a document) and the text "Upload File" and "Drop files here or click to upload". At the bottom of the modal are "Cancel" and "Save" buttons.

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.

The screenshot shows a web application interface with a modal dialog titled "Add New Journal Entry". The dialog has three tabs: "DETAILS", "ATTACHMENTS", and "RECORDS". The "RECORDS" tab is selected. Inside the dialog, there is a text input field with a green border, which is highlighted by an orange circle. To the right of this field is a button labeled "Link Record". Below the text field, the word "Offer" is displayed, followed by the address "97 Yew Tree Close, Hurworth, D...". There is a "Private" toggle switch and a trash icon. At the bottom right of the dialog are "Cancel" and "Save" buttons. The background is a blurred view of the application's main interface.

21

Click "Save"

This screenshot shows the same "Add New Journal Entry" dialog box as in the previous step. In this view, the "Link Record" text field is no longer highlighted. Instead, the "Save" button at the bottom right of the dialog is highlighted with an orange circle. The rest of the dialog's content, including the "RECORDS" tab and the address "97 Yew Tree Close, Hurworth, D...", remains the same.