

# Adding Vendor and Purchaser Solicitors to Property Record



This guide offers a straightforward walk-through for adding solicitors to property records, via the Progression and the Chain.

By following these steps, users can efficiently manage their property records and maintain accurate information, which is crucial for smooth dealings. Whether you're a real estate professional or a homeowner, this guide simplifies the process, saving you time and reducing potential errors.



**Alert!** To add a solicitor for Purchaser you must have at least an offer marked as Pending or Under Offer. Otherwise you add as a Contact to the Applicant record.

## 1 Navigate to the Property Record.

The screenshot shows the iam property software interface. The top navigation bar includes 'My day', 'Lettings', 'Sales', 'Accounts', 'Reporting', 'Communications', and 'My account'. The main content area displays a property listing with a price of £352,000. The 'PROPERTY PICTURES' section shows a large image of a red brick house and several smaller thumbnail images. The 'Content Approval' section indicates 'Vendor has approved this content'. The 'Property Address' section shows 'Postcode DL2 2HX' and 'Address 97 Yew Tree Close, Hurworth, Darlington, DL2 2HX, UK'. The 'Price/Instructed Date' section shows a price of 350,000 GBP. The left sidebar lists various sections: Details, Checklist, Appraisals, Compliance, Information, Stats, Marketing, Media, Rooms, and Portals. The 'Solicitor/Conveyancing' section at the bottom of the main area has a '+Add Solicitor' button and fields for 'Solicitor Instructed' and 'Instructed Date'.

## Vendor Solicitor

2

If the Vendor Solicitor has been instructed. Click here to mark that the Solicitor has been instructed and the the date instructed.

My day Lettings Sales Accounts Reporting Communications

8 Viewings 5 Offers £ 352,000 ↗

**Details**

**Solicitor/Conveyancing**

Solicitor Instructed  **Instructed Date**

Solicitor Close Thornton | Duke Street, Darli... Contact John Edgar

Address Duke Street, Darlington, Co Durham, DL3 0ZS

Email zagg.dave@gmail.com Phone 01325464645

Mobile phone Fax

**Price/Instructed Date**

Prefix  Price (GBP) £ 350,000

Default

**Fees/Contract**

Contract Type Contract Expires

Fee Amount £ 0.00 %  Commission £ 0.00 %

Solicitor Referral Fees £ 0.00 Property Marketing Fees £ 0.00

3

Click the "Instructed Date" field and set as required.

My day Lettings Sales Accounts Reporting Communications

8 Viewings 5 Offers £ 352,000 ↗

**Details**

**Solicitor/Conveyancing**

Solicitor Instructed  **Instructed Date**

Solicitor Close Thornton | Duke Street, Darli... Contact John Edgar

Address Duke Street, Darlington, Co Durham, DL3 0ZS

Email zagg.dave@gmail.com Phone 01325464645

Mobile phone Fax

**Price/Instructed Date**

Prefix  Price (GBP) £ 350,000

Default

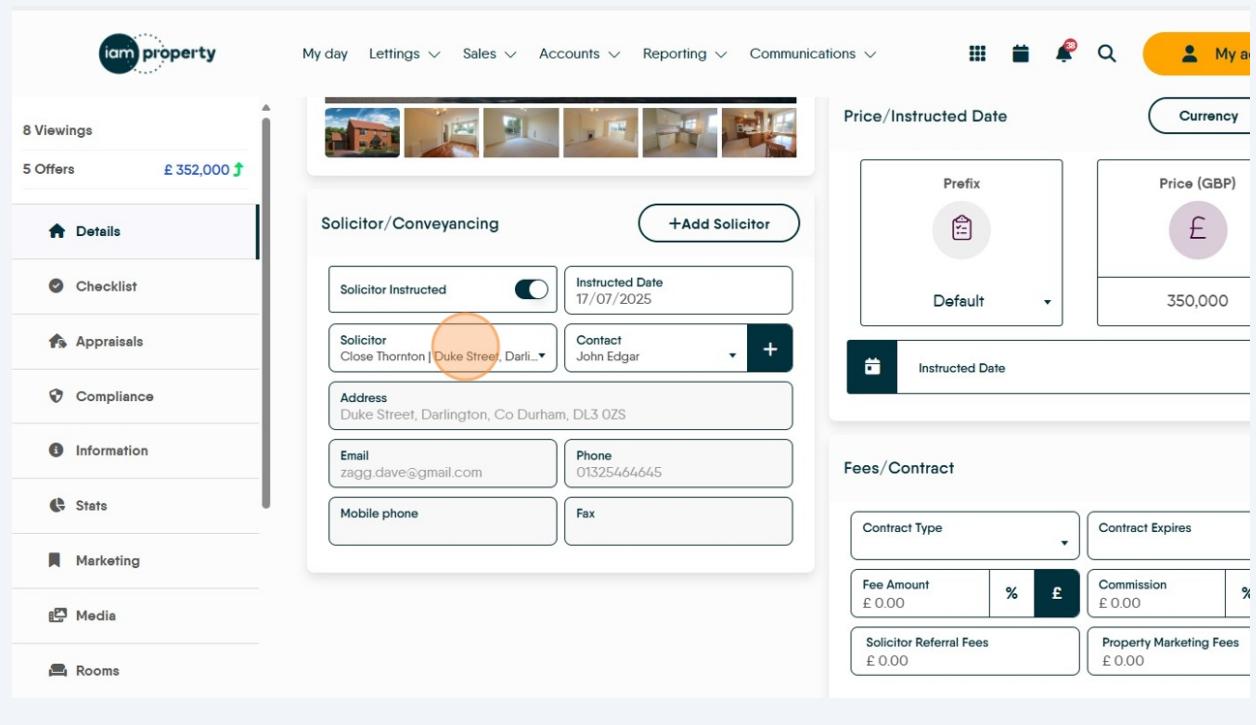
**Fees/Contract**

Contract Type Contract Expires

Fee Amount £ 0.00 %  Commission £ 0.00 %

Solicitor Referral Fees £ 0.00 Property Marketing Fees £ 0.00

4 Click Solicitor and select from your pre set solicitors.



8 Viewings

5 Offers £ 352,000

**Solicitor/Conveyancing**

Solicitor Instructed  Instructed Date 17/07/2025

Solicitor Close Thornton | Duke Street, Darli... Contact John Edgar

Address Duke Street, Darlington, Co Durham, DL3 0ZS

Email zagg.dave@gmail.com Phone 01325464645

Mobile phone Fax

**Price/Instructed Date**

Prefix Default

Price (GBP) £ 350,000

Instructed Date

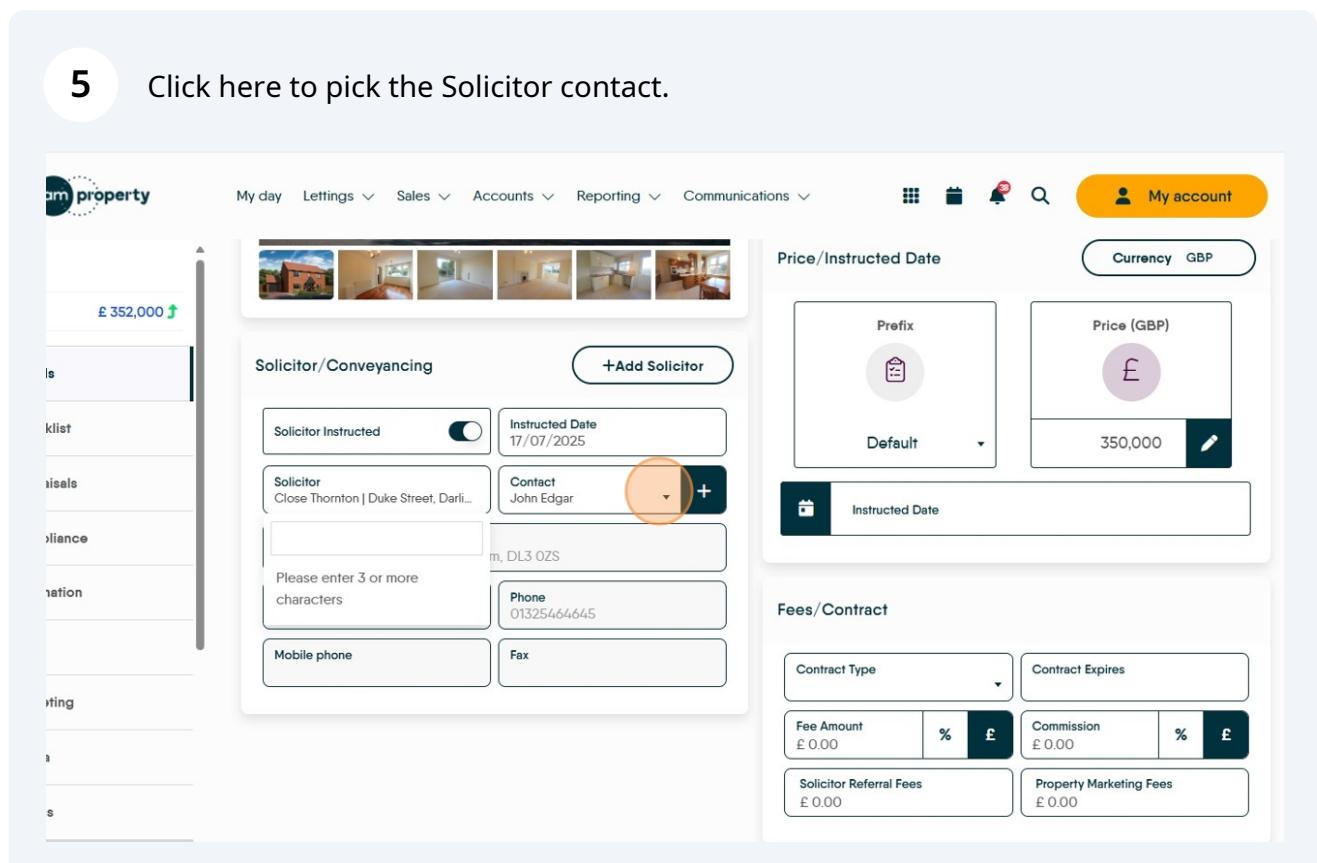
**Fees/Contract**

Contract Type Contract Expires

Fee Amount £ 0.00 % £ Commission £ 0.00 %

Solicitor Referral Fees £ 0.00 Property Marketing Fees £ 0.00

5 Click here to pick the Solicitor contact.



8 Viewings

5 Offers £ 352,000

**Solicitor/Conveyancing**

Solicitor Instructed  Instructed Date 17/07/2025

Solicitor Close Thornton | Duke Street, Darli... Contact John Edgar

Address Duke Street, Darlington, Co Durham, DL3 0ZS

Please enter 3 or more characters

Phone 01325464645

Mobile phone Fax

**Price/Instructed Date**

Prefix Default

Price (GBP) £ 350,000

Instructed Date

**Fees/Contract**

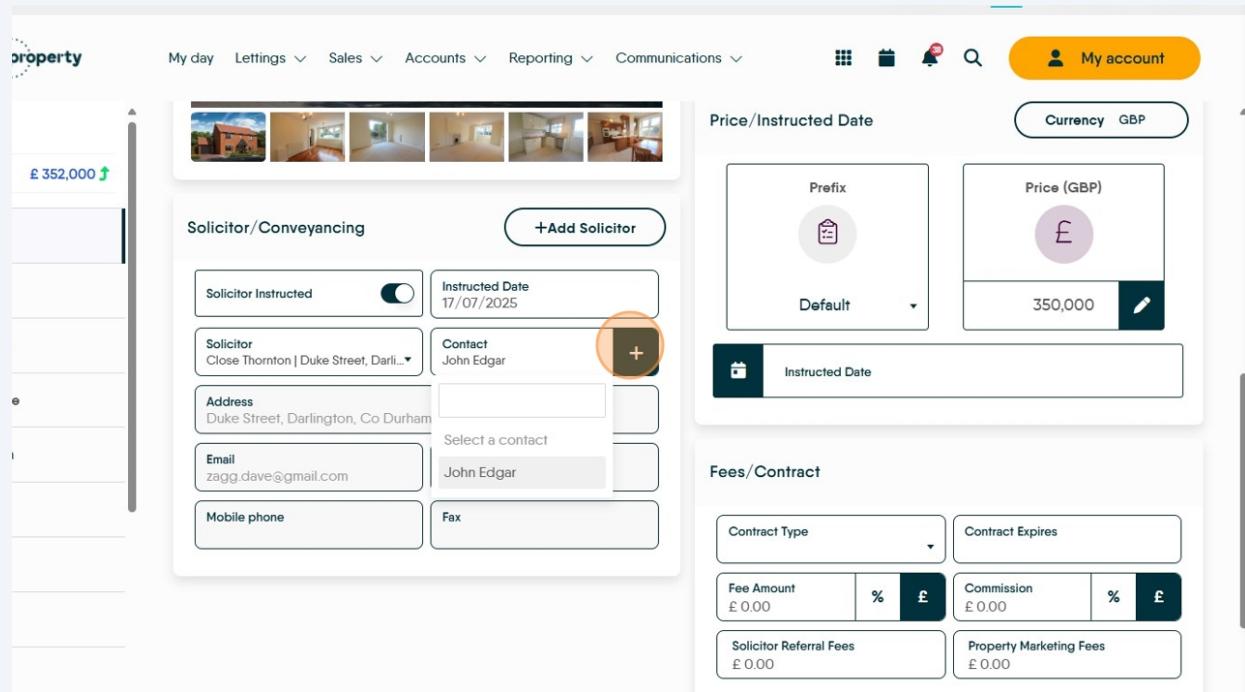
Contract Type Contract Expires

Fee Amount £ 0.00 % £ Commission £ 0.00 %

Solicitor Referral Fees £ 0.00 Property Marketing Fees £ 0.00

6

If the contact is not in the list click the + and add the new contact.  
Click and add all the required information.  
Click "Add Contact"



My day Lettings Sales Accounts Reporting Communications

Price/Instructed Date

Currency GBP

Solicitor/Conveyancing

+Add Solicitor

Solicitor Instructed (Switch)

Instructed Date: 17/07/2025

Solicitor: Close Thornton | Duke Street, Darli...

Contact: John Edgar

+ (highlighted with a red circle)

Address: Duke Street, Darlington, Co Durham

Email: zagg.dave@gmail.com

Mobile phone

Fax

Prefix

Default

Price (GBP)

£ 350,000

Instructed Date

Fees/Contract

Contract Type

Contract Expires

Fee Amount: £ 0.00

%: %

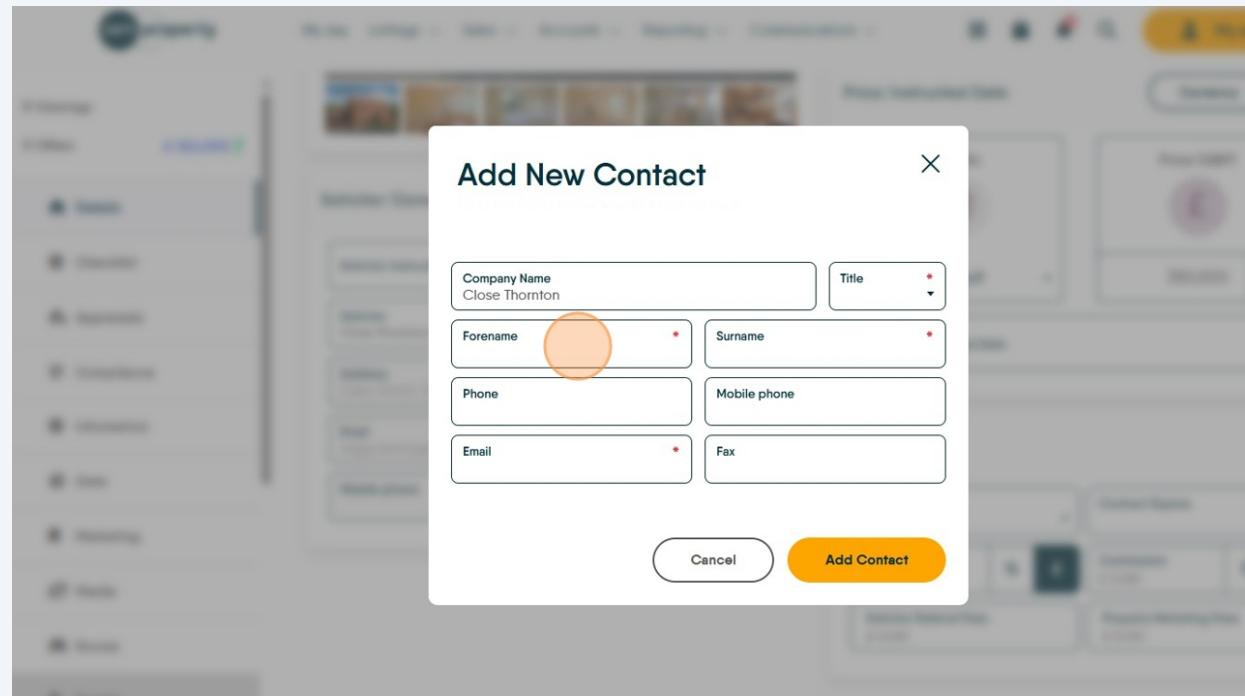
Commission: £ 0.00

%: %

£ (highlighted with a red circle)

Solicitor Referral Fees: £ 0.00

Property Marketing Fees: £ 0.00



Add New Contact

Company Name: Close Thornton

Title:

Forename: (highlighted with a red circle)

Surname: \*

Phone:

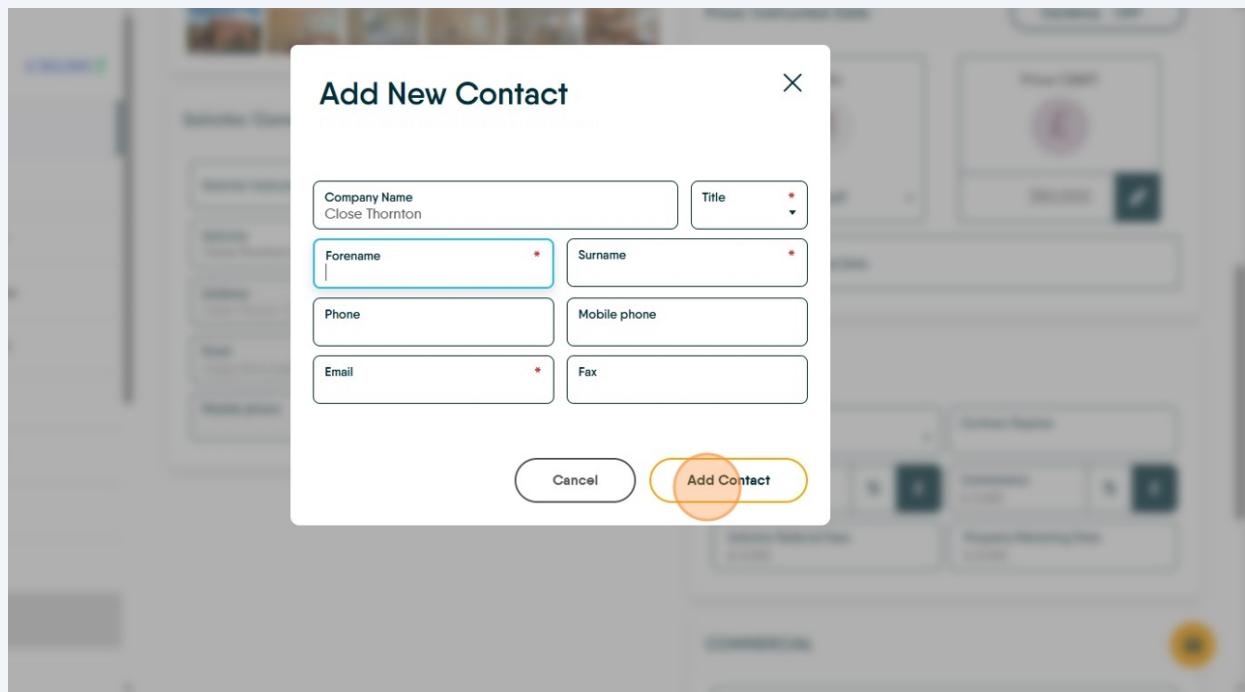
Mobile phone:

Email: \*

Fax:

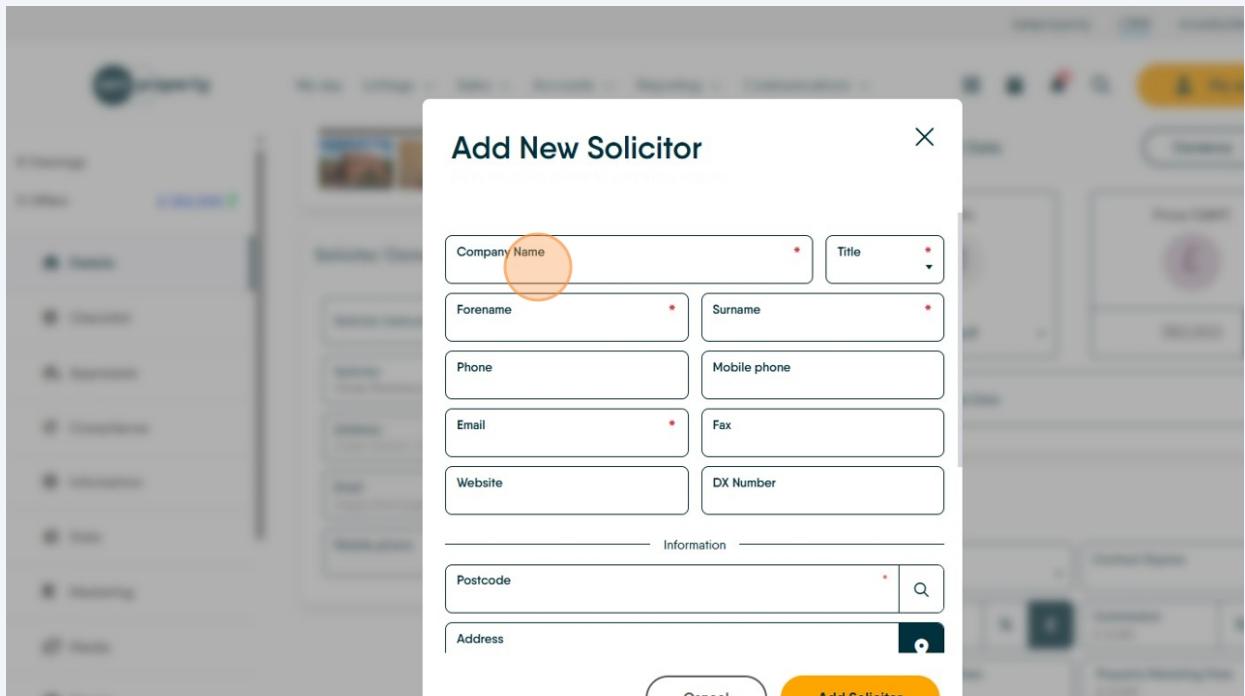
Cancel

Add Contact

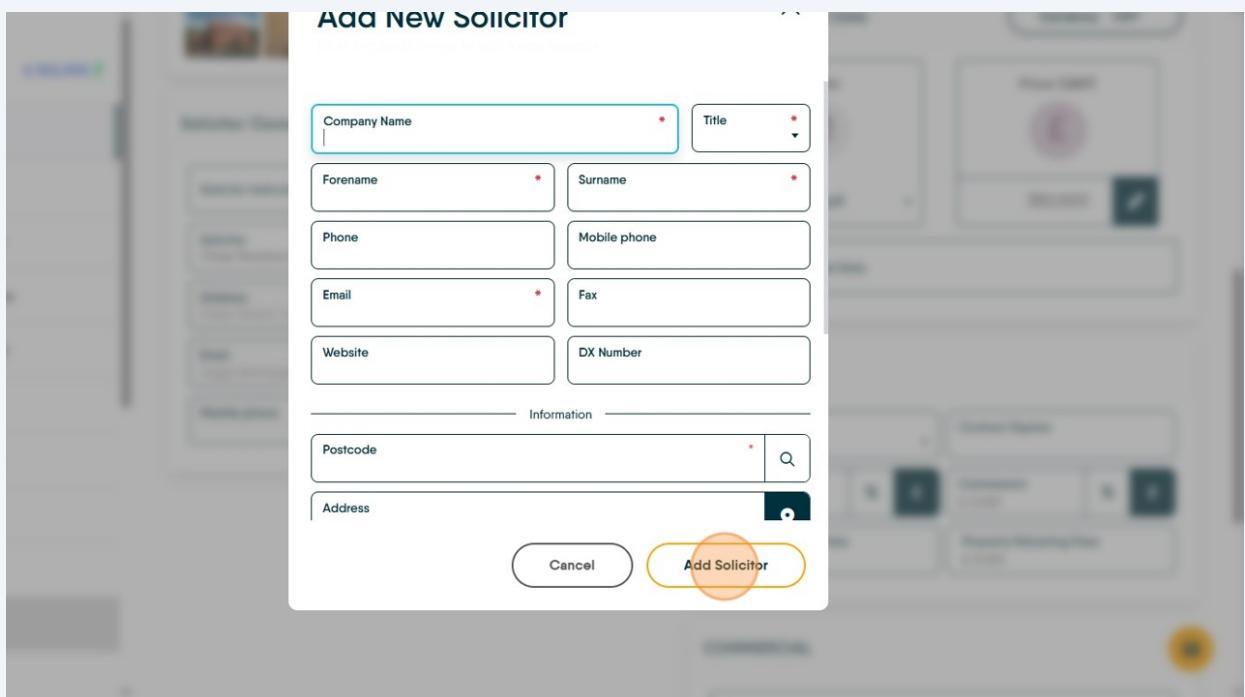


7 If the Solicitor practice is not in your CRM click "Add Solicitor"

8 Click the "Company Name" field and continue to complete all the information..



9 Click "Add Solicitor"



## Adding Purchasers Solicitor

10

Once there has been an offer made that is Pending or Under offer then the Solicitors for the Purchaser can be added to the Progression Chain. Before this they can be added as a Contact in the Purchasers 'Applicant' record.

11

Click "Offers"

PROPERTY PICTURES Upload

Content Approval

✓ Vendor has approved this content

Property Address Edit Address

Postcode: DL2 2HX

Address: 97 Yew Tree Close, Hurworth, Darlington, Durham, DL2 2HX, UK

Price/Instructed Date Currency

Prefix: Default

Price (GBP): £ 350,000

Instructed Date

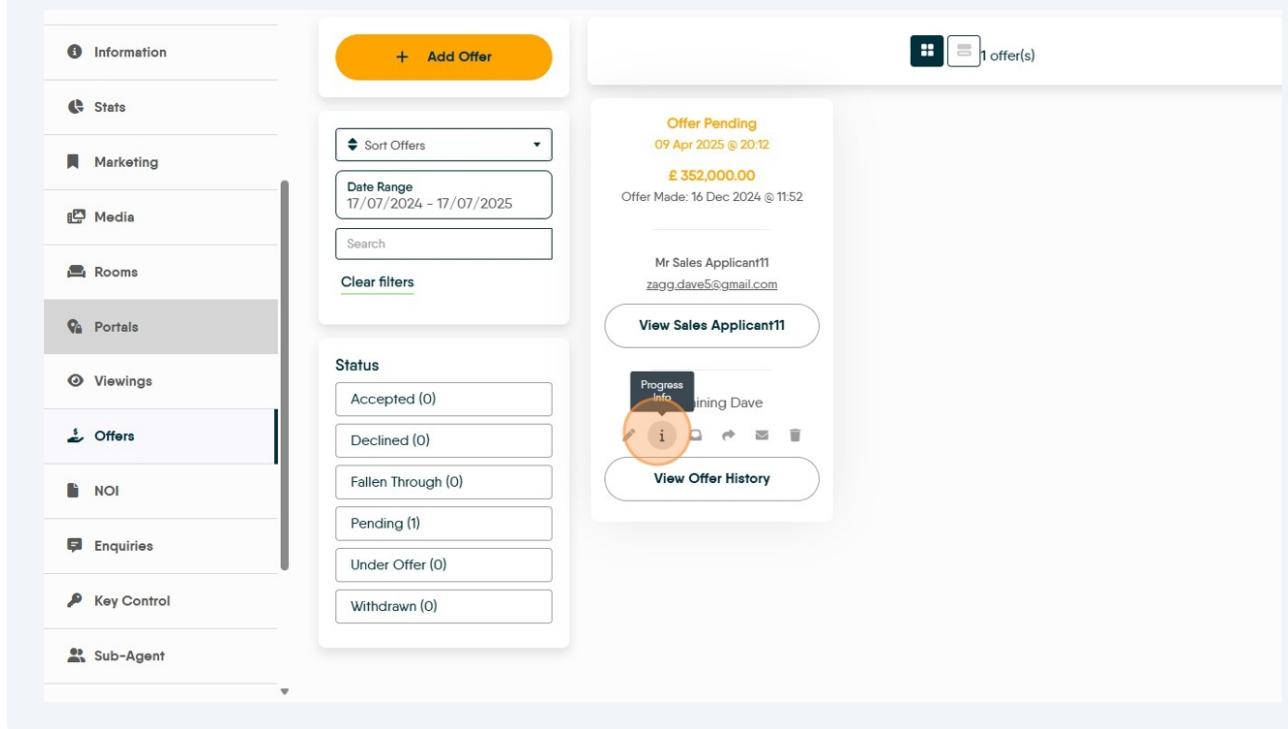
Solicitor/Conveyancing +Add Solicitor

Solicitor Instructed:  Instructed Date:

Solicitor: Close Thornton | Duke Street, Darli... Contact: John Edgar + Add

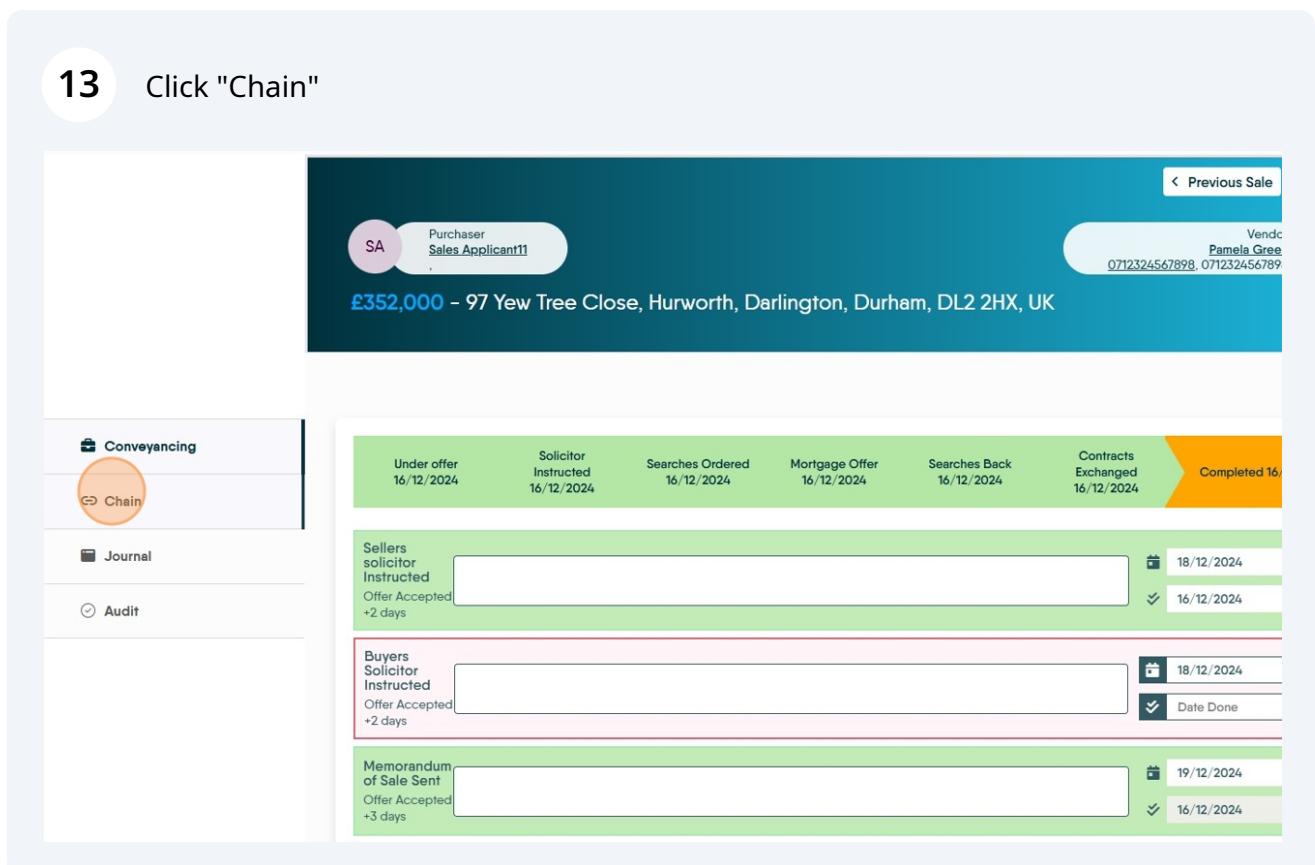
Address: Duke Street, Darlington, Co Durham, DL3 0ZS

## 12 Click here.



The screenshot shows the 'Offers' section of a software interface. On the left, a sidebar lists various categories: Information, Stats, Marketing, Media, Rooms, Portals (which is selected and highlighted in grey), Viewings, Offers (which is also highlighted in grey), NOI, Enquiries, Key Control, and Sub-Agent. The main content area shows a single offer entry. At the top right, there are icons for a grid and a list, with the text '1 offer(s)'. Below this, the offer details are listed: 'Offer Pending' (highlighted in yellow), '09 Apr 2025 @ 20:12', '£ 352,000.00' (highlighted in yellow), and 'Offer Made: 16 Dec 2024 @ 11:52'. The offer is made by 'Mr Sales Applicant11' with the email 'zagg.dave5@gmail.com'. A 'View Sales Applicant11' button is below this. In the center, there is a 'Progress' section with a status bar showing 'Chain Dave' and a small 'i' icon, which is circled in orange. Below the progress bar is a 'View Offer History' button. On the left, there is a 'Status' section with buttons for Accepted (0), Declined (0), Fallen Through (0), Pending (1), Under Offer (0), and Withdrawn (0). At the top center, there is a yellow 'Add Offer' button.

## 13 Click "Chain"



The screenshot shows the 'Conveyancing' section of the software. On the left, a sidebar lists: Conveyancing (which is selected and highlighted in orange), Chain (which is also highlighted in orange), Journal, and Audit. The main content area displays a summary of the transaction: 'Purchaser Sales Applicant11' (SA), 'Vender Pamela Green', and the address '£352,000 - 97 Yew Tree Close, Hurworth, Darlington, Durham, DL2 2HX, UK'. Below this, a timeline shows the following events: 'Under offer 16/12/2024', 'Solicitor Instructed 16/12/2024', 'Searches Ordered 16/12/2024', 'Mortgage Offer 16/12/2024', 'Searches Back 16/12/2024', 'Contracts Exchanged 16/12/2024', and 'Completed 16/12/2024'. The timeline is color-coded with green for completed steps and orange for the current step ('Chain'). Below the timeline, there are three sections: 'Sellers solicitor Instructed' (Offer Accepted +2 days), 'Buyers Solicitor Instructed' (Offer Accepted +2 days), and 'Memorandum of Sale Sent' (Offer Accepted +3 days). Each section has a date field (18/12/2024) and a status field (16/12/2024).

14

If it is a Solicitor that has been used before click here. Type the name and select from the drop down list.

The screenshot shows a software interface for managing property details. At the top, there is a navigation bar with links: My day, Lettings, Sales, Accounts, Reporting, Communications, and a yellow 'My account' button. Below the navigation bar, there are two main sections: 'Vendor's Solicitor' and 'Purchaser's Solicitor'. Each section contains fields for 'Solicitor' (a dropdown menu), 'Contact' (a dropdown menu with a '+' button to add a new contact), 'Address' (text input), and various phone and email fields. Below these sections is a 'Notes' area with a text input field and a save button. The 'Purchaser's Solicitor' section has a 'Solicitor' field that is currently empty and highlighted with a red circle, indicating it is the focus of the instruction.

15

Click here to select the Solicitor Contact. If the Contact isn't in the list, click the + and add the new details.

Email	Phone
Work phone	Mobile phone

Email	Phone
Work phone	Mobile phone

**Vendor's Solicitor** **+ Add Solicitor**

**Solicitor**  
Close Thornton | Duke Street, Darlington, Co Durham, DL3 0ZS, ...

**Contact**  
John Edgar

**Address**  
Duke Street, Darlington, Co Durham, DL3 0ZS

Email  
zagg.dave@gmail.com

Phone  
01325464645

Mobile phone

Fax

**Purchaser's Solicitor** **+ Add Solicitor**

**Solicitor**  
LymeBay Solicitors - Bakery Flat Pitt House, Broad Street, Lyme Regis, Dorset, ...

**Contact**  
Select a contact

**Address**  
Bakery Flat Pitt House, Broad Street, Lyme Regis, Dorset, DT7 3QF

Email

Phone

Mobile phone

Fax

**Notes**  
Type your notes here

**+ Add Solicitor**

Email	Phone
Work phone	Mobile phone

Email	Phone
Work phone	Mobile phone

**Vendor's Solicitor** **+ Add Solicitor**

**Solicitor**  
Close Thornton | Duke Street, Darlington, Co Durham, DL3 0ZS, ...

**Contact**  
John Edgar

**Address**  
Duke Street, Darlington, Co Durham, DL3 0ZS

Email  
zagg.dave@gmail.com

Phone  
01325464645

Mobile phone

Fax

**Purchaser's Solicitor** **+ Add Solicitor**

**Solicitor**  
LymeBay Solicitors - Bakery Flat Pitt House, Broad Street, Lyme Regis, Dorset, ...

**Contact**  
Select a contact

**Address**  
Bakery Flat Pitt House, Broad Street, Lyme Regis, Dorset, DT7 3QF

Email

Phone

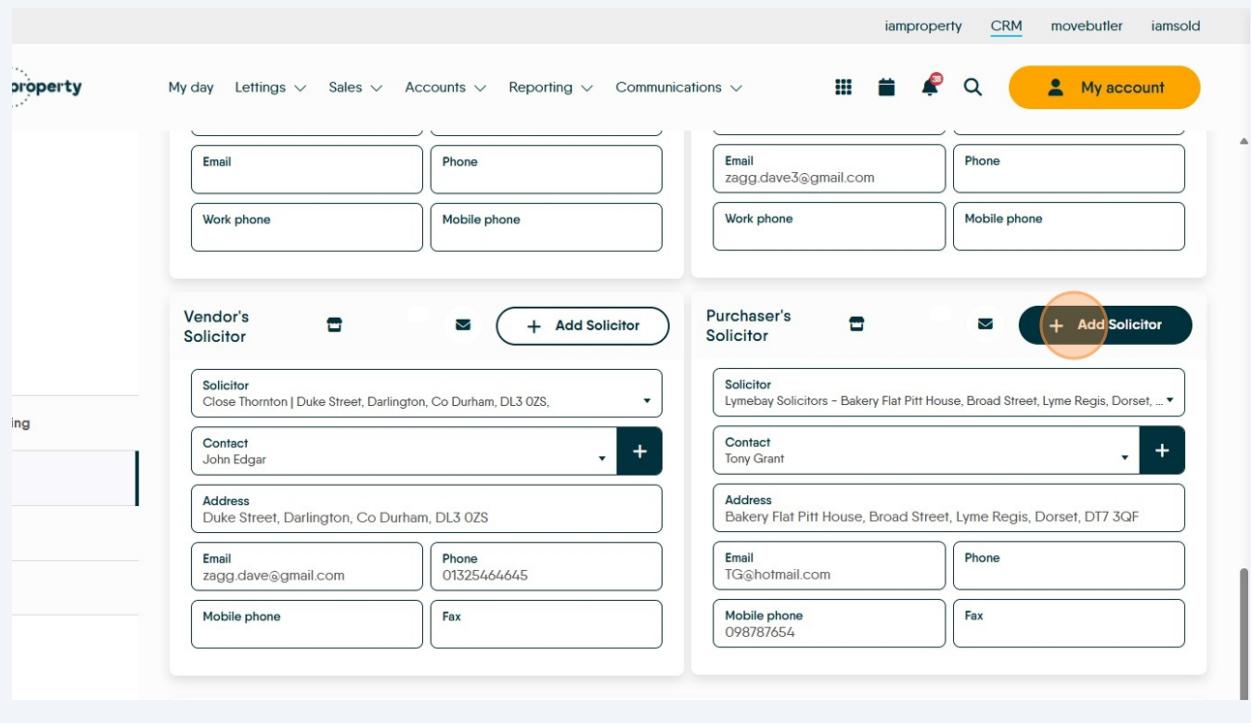
Mobile phone

Fax

**Notes**  
Type your notes here

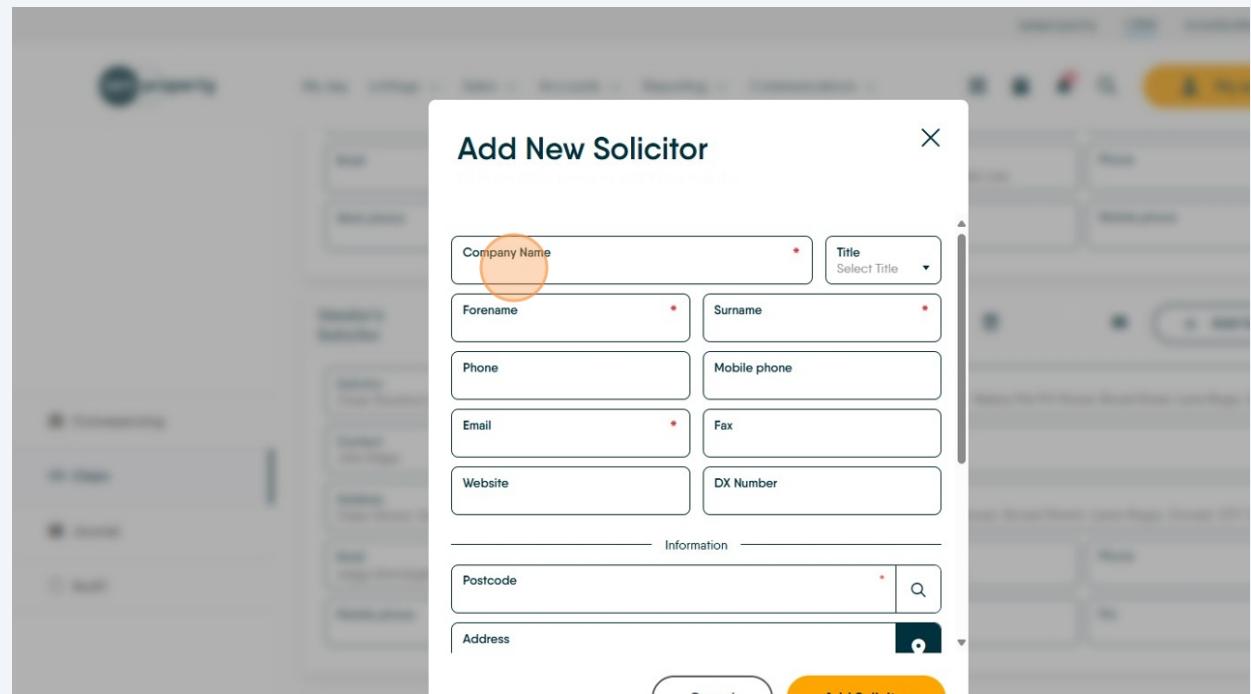
**+ Add Solicitor**

16 If it is a new solicitor practice click "Add Solicitor"



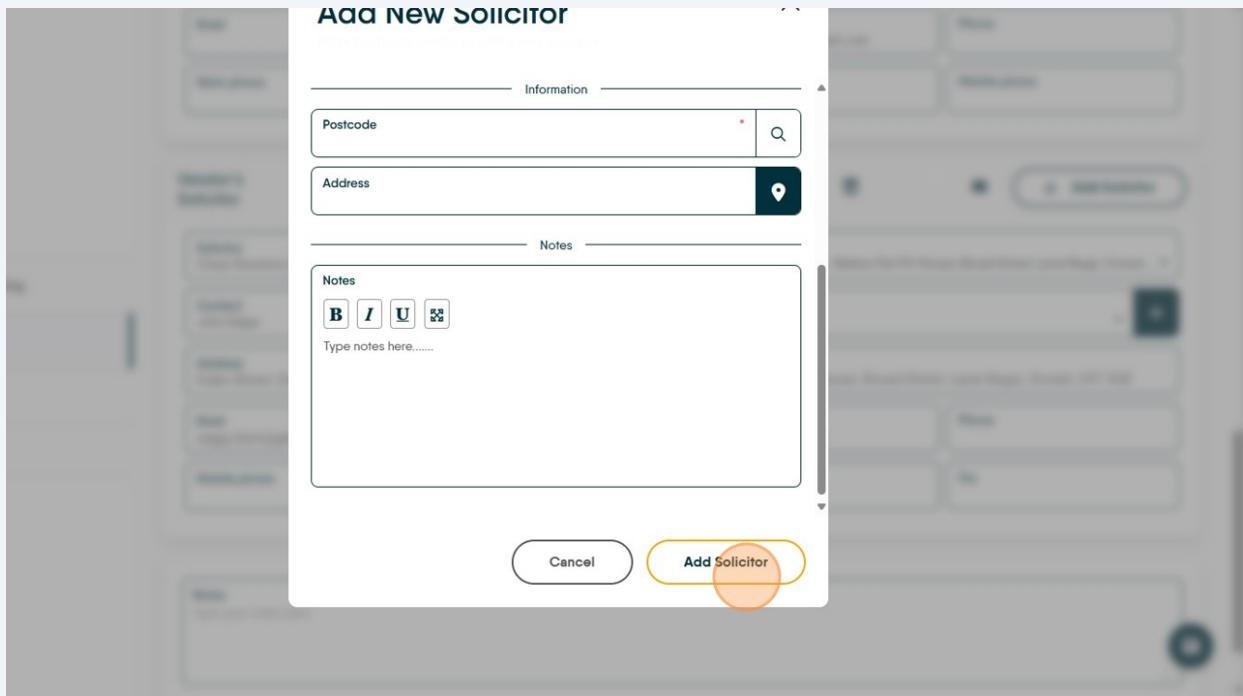
The screenshot shows the iamproperty software interface. At the top, there are navigation links: 'My day', 'Lettings', 'Sales', 'Accounts', 'Reporting', 'Communications', 'CRM', 'movebutler', and 'iamsold'. Below the navigation, there are sections for 'Vendor's Solicitor' and 'Purchaser's Solicitor'. Each section contains fields for 'Solicitor' (with dropdown menus), 'Contact' (with dropdown menus), 'Address' (text input), and 'Email', 'Phone', 'Mobile phone', 'Fax' (input fields). The 'Purchaser's Solicitor' section has an orange circle around the '+ Add Solicitor' button.

17 Click the "Company Name" field, and continue to complete all the fields you have information for.



The screenshot shows the 'Add New Solicitor' modal window. It contains fields for 'Company Name', 'Title', 'Forename', 'Surname', 'Phone', 'Mobile phone', 'Email', 'Fax', 'Website', 'DX Number', 'Postcode', and 'Address'. The 'Company Name' field is highlighted with an orange circle. At the bottom of the modal are 'Cancel' and 'Add Solicitor' buttons.

18 Click "Add Solicitor"



19 Click here to add a new Contact.  
Click the "Forename" field and continue to complete all the fields.  
Click "Add Contact"

