

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 Purchasor 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 displays the 'iam property' software interface. The top navigation bar includes 'My day', 'Lettings', 'Sales', 'Accounts', 'Reporting', and 'Communications'. The left sidebar lists various sections: 'Details', 'Checklist', 'Appraisals', 'Compliance', 'Information', 'Stats', 'Marketing', 'Media', 'Rooms', and 'Portals'. The main content area is titled 'PROPERTY PICTURES' and features a large image of a red brick house. Below this, there are smaller thumbnail images. To the right of the main image is a 'Content Approval' section with a green checkmark indicating 'Vendor has approved this content'. Below that is the 'Property Address' section, which includes a 'Postcode' field (DL2 2HX) and an 'Address' field (97 Yew Tree Close, Hurworth, Darlington, Durham, DL2 2HX, UK). Further down is the 'Price/Instructed Date' section, which includes a 'Prefix' dropdown (Default) and a 'Price (GBP)' field (350,000). At the bottom, there is a 'Solicitor/Conveyancing' section with a '+Add Solicitor' button and fields for 'Solicitor Instructed', 'Instructed Date', 'Solicitor', and 'Contact'.

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.

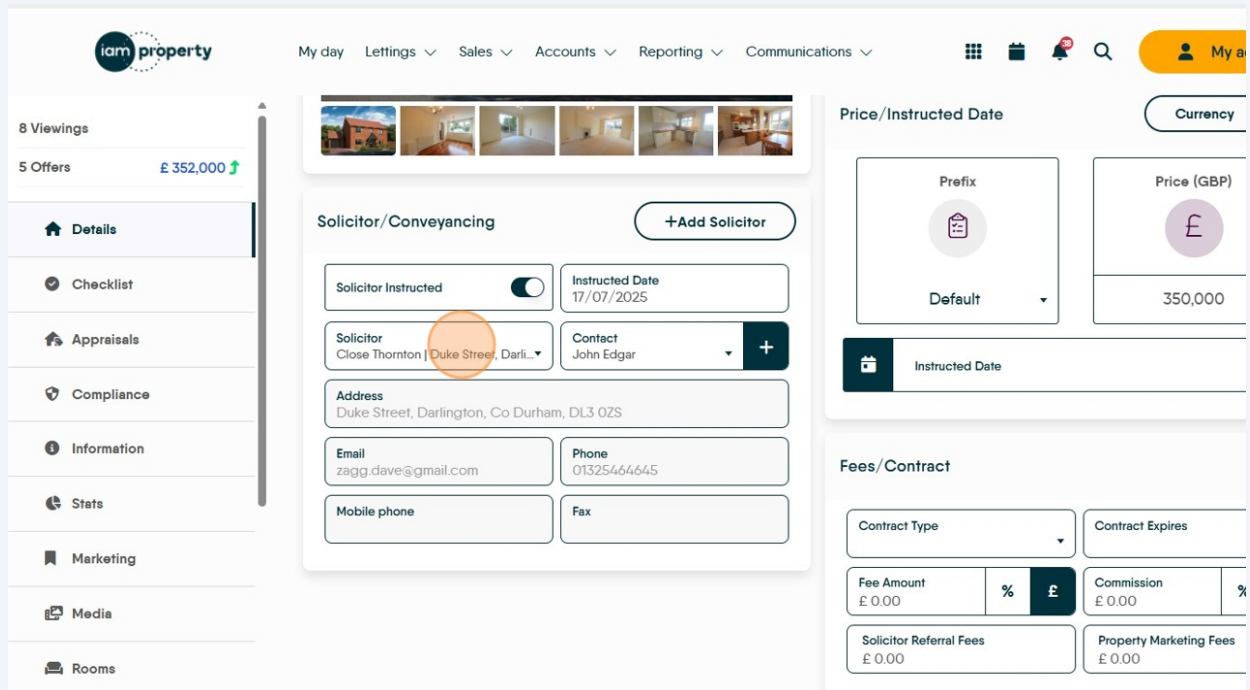
The screenshot shows the IAM Property CRM interface. On the left is a sidebar with navigation links: Details, Checklist, Appraisals, Compliance, Information, Stats, Marketing, and Media. The main content area is divided into several sections. The 'Solicitor/Conveyancing' section is highlighted, showing a toggle for 'Solicitor Instructed' (which is currently off) and an 'Instructed Date' field. Below this are fields for 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, and Fax. To the right, the 'Price/Instructed Date' section shows a 'Prefix' dropdown set to 'Default' and a 'Price (GBP)' of £350,000. Below this is a section for 'Fees/Contract' with fields for Contract Type, Contract Expires, Fee Amount (£0.00), Commission (£0.00), Solicitor Referral Fees (£0.00), and Property Marketing Fees (£0.00). An orange circle highlights the 'Instructed Date' field in the 'Solicitor/Conveyancing' section.

3

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

This screenshot is identical to the one above, but the 'Solicitor Instructed' toggle is now turned on. The 'Instructed Date' field remains empty and is highlighted with an orange circle. All other fields and sections are the same as in the previous screenshot.

4 Click Solicitor and select from your pre set solicitors.



8 Viewings
5 Offers £ 352,000 ↑

Details
Checklist
Appraisals
Compliance
Information
Stats
Marketing
Media
Rooms

Solicitor/Conveyancing +Add Solicitor

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 zaggy.dave@gmail.com Phone 01325464645

Mobile phone Fax

Price/Instructed Date Currency

Prefix Default Price (GBP) £ 350,000

Instructed Date

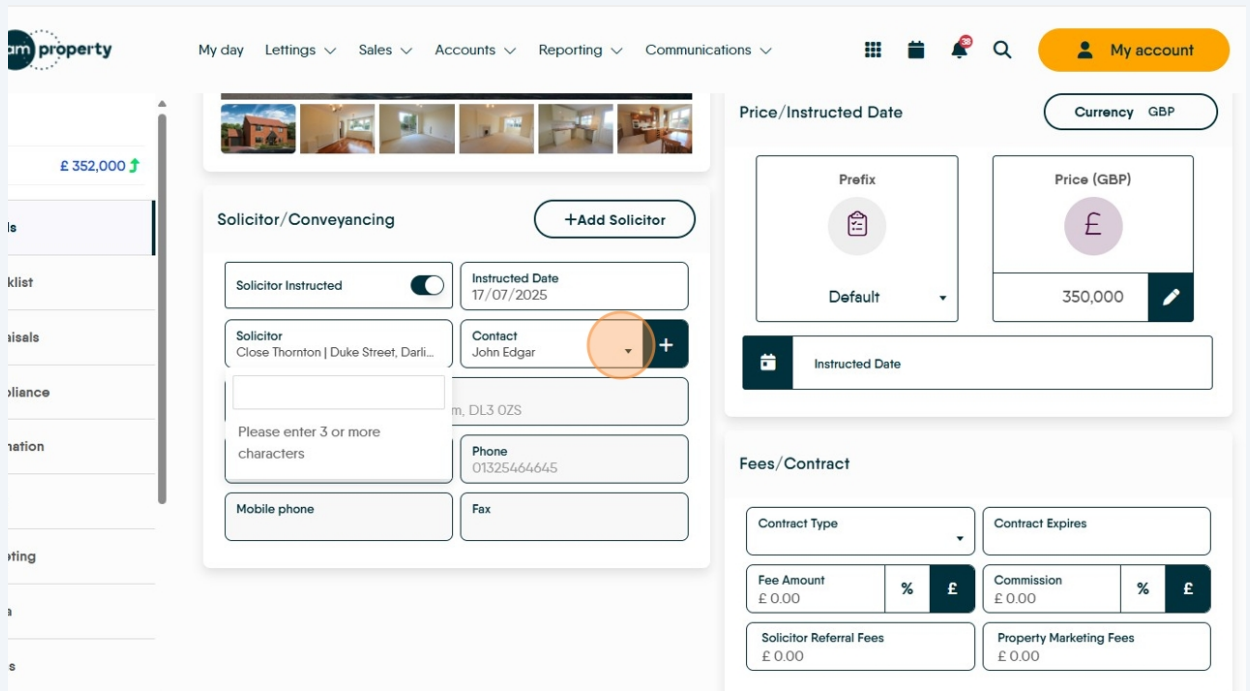
Fees/Contract

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.



iam property My day Lettings Sales Accounts Reporting Communications My account

£ 352,000 ↑

Solicitor/Conveyancing +Add Solicitor

Solicitor Instructed ☒ Instructed Date 17/07/2025

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

Please enter 3 or more characters m, DL3 0ZS

Phone 01325464645

Mobile phone Fax

Price/Instructed Date Currency GBP

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"

The screenshot shows the 'property' software interface. The top navigation bar includes 'My day', 'Lettings', 'Sales', 'Accounts', 'Reporting', and 'Communications'. The main content area is divided into sections. On the left, there's a sidebar with a price indicator of £ 352,000. The central section is titled 'Solicitor/Conveyancing' and features a '+ Add Solicitor' button highlighted with a red circle. Below this, there are fields for 'Solicitor Instructed' (a toggle switch), 'Instructed Date' (17/07/2025), 'Solicitor' (Close Thornton | Duke Street, Darli...), 'Contact' (John Edgar), 'Address' (Duke Street, Darlington, Co Durham), 'Email' (zaggg.dave@gmail.com), 'Mobile phone', and 'Fax'. To the right, there's a 'Price/Instructed Date' section with a 'Currency' dropdown set to 'GBP' and a 'Price (GBP)' field showing £ 350,000. Below that is a 'Fees/Contract' section with fields for 'Contract Type', 'Contract Expires', 'Fee Amount' (£ 0.00), 'Commission' (£ 0.00), 'Solicitor Referral Fees' (£ 0.00), and 'Property Marketing Fees' (£ 0.00).

The screenshot shows a modal form titled 'Add New Contact' with a close button (X) in the top right corner. The form contains several input fields: 'Company Name' (with 'Close Thornton' entered), 'Title' (a dropdown menu), 'Forename' (with a red circle highlighting it), 'Surname', 'Phone', 'Mobile phone', 'Email', and 'Fax'. At the bottom of the modal, there are two buttons: 'Cancel' and 'Add Contact'.

Add New Contact

Company Name
Close Thornton

Title ▼

Forename *

Surname *

Phone

Mobile phone

Email *

Fax

Cancel

Add Contact

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

My day
Lettings
Sales
Accounts
Reporting
Communications

My account

Solicitor/Conveyancing

Solicitor Instructed

Instructed Date
17/07/2025

Solicitor
Close Thornton | Duke Street, Darl...

Contact
John Edgar

+ Add Solicitor

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

Email
zaggdave@gmail.com

Phone
01325464645

Mobile phone

Fax

Price/Instructed Date

Prefix
Default

Instructed Date

Price (GBP)
£

350,000

Fees/Contract

Contract Type

Contract Expires

Fee Amount
£ 0.00

%

£

Commission
£ 0.00

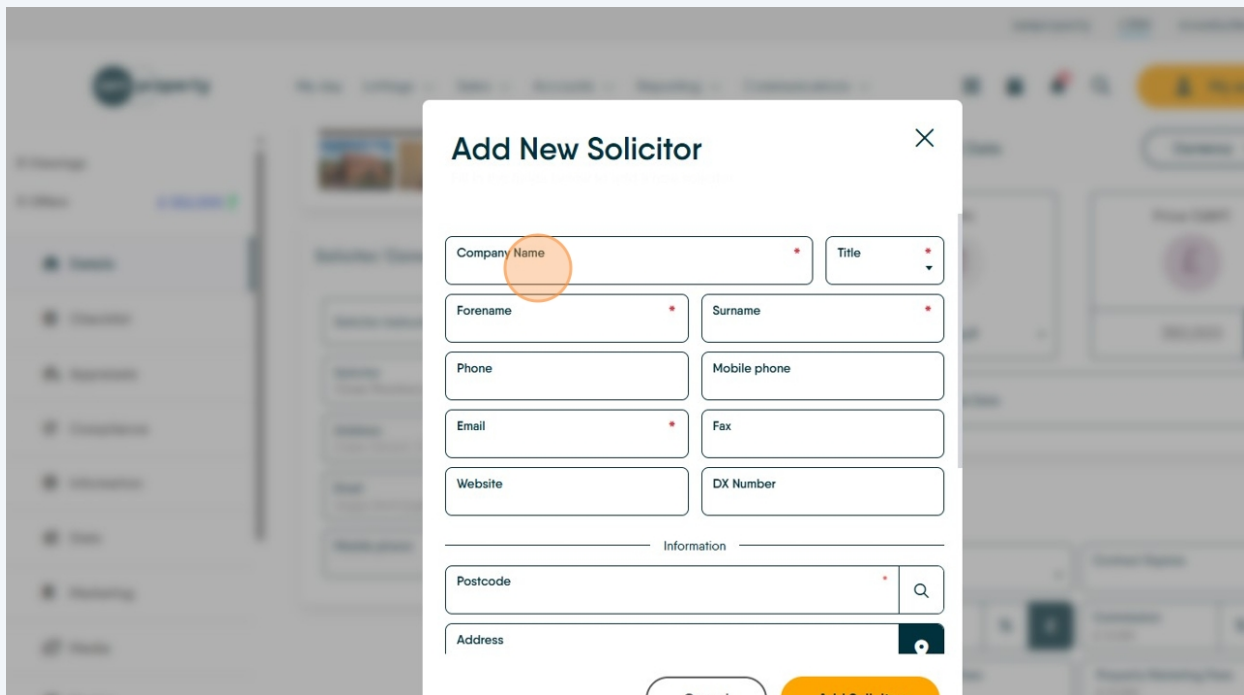
%

£

Solicitor Referral Fees
£ 0.00

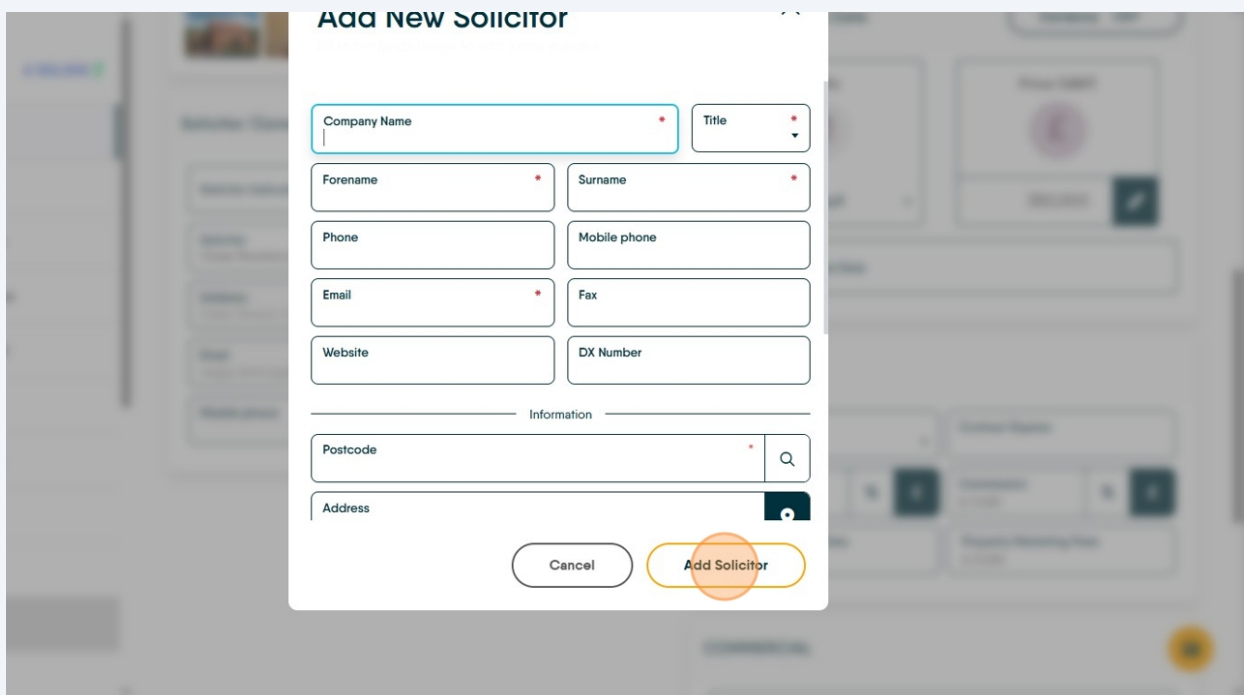
Property Marketing Fees
£ 0.00

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



The screenshot shows a modal window titled "Add New Solicitor" with a close button (X) in the top right corner. The form contains several input fields: "Company Name" (highlighted with an orange circle), "Title" (a dropdown menu), "Forename", "Surname", "Phone", "Mobile phone", "Email", "Fax", "Website", and "DX Number". Below these fields is a section labeled "Information" containing "Postcode" and "Address" fields. At the bottom of the form are two buttons: "Cancel" and "Add Solicitor".

- 9 Click "Add Solicitor"



This screenshot shows the same "Add New Solicitor" modal window. In this view, the "Add Solicitor" button at the bottom right is highlighted with an orange circle, indicating the next step in the process.

Adding Purchasers Solicitor

10


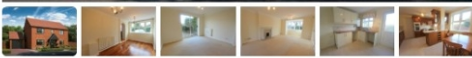
Once there has been an offer made that is Pending or Under offer then the Solicitors for the Purchaser can be added to the Progression Chain. Before this they can be added as a Contact in the Purchasors 'Applicant' record.

11

Click "Offers"

- Information
- Stats
- Marketing
- Media
- Rooms
- Portals
- Viewings
- Offers**
- NOI
- Enquiries
- Key Control
- Sub-Agent

PROPERTY PICTURES Upload

Solicitor/Conveyancing +Add Solicitor

☐ Solicitor Instructed

+

Content Approval

✓ Vendor has approved this content

Property Address Edit Address

Price/Instructed Date Currency

Prefix

Default

Price (GBP)

£

350,000

☐ Instructed Date

12 Click here.

Information

Stats

Marketing

Media

Rooms

Portals

Viewings

Offers

NOI

Enquiries

Key Control

Sub-Agent

+ Add Offer

Sort Offers

Date Range
17/07/2024 - 17/07/2025

Search

Clear filters

Status

Accepted (0)

Declined (0)

Fallen Through (0)

Pending (1)

Under Offer (0)

Withdrawn (0)

1 offer(s)

Offer Pending

09 Apr 2025 @ 20:12

£ 352,000.00

Offer Made: 16 Dec 2024 @ 11:52

Mr Sales Applicant11

zagg.dave5@gmail.com

View Sales Applicant11

Progress Info

ining Dave

View Offer History

13 Click "Chain"

SA

Purchaser
Sales Applicant11

Vendc
Pamela.Gree

0712324567898 071232456789

£352,000 - 97 Yew Tree Close, Hurworth, Darlington, Durham, DL2 2HX, UK

Conveyancing

Chain

Journal

Audit

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

Completed 16/12/2024

Sellers
solicitor
Instructed

Offer Accepted
+2 days

18/12/2024

16/12/2024

Buyers
Solicitor
Instructed

Offer Accepted
+2 days

18/12/2024

Date Done

Memorandum
of Sale Sent

Offer Accepted
+3 days

19/12/2024

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 web application interface for managing property transactions. The top navigation bar includes links for 'My day', 'Lettings', 'Sales', 'Accounts', 'Reporting', and 'Communications', along with a 'My account' button. The main content area is divided into two columns: 'Vendor's Solicitor' and 'Purchaser's Solicitor'. Each column has a header with a '+ Add Solicitor' button. Below the header, there are input fields for 'Solicitor', 'Contact', 'Address', 'Email', 'Phone', 'Work phone', 'Mobile phone', and 'Fax'. The 'Solicitor' field in the 'Purchaser's Solicitor' column is highlighted with an orange circle. Below the input fields, there is a 'Notes' section with a text area and a '+ Add Note' button. The interface also includes a top navigation bar with 'My day', 'Lettings', 'Sales', 'Accounts', 'Reporting', and 'Communications' tabs, and a 'My account' button in the top right corner.

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 zagg.dave3@gmail.com	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



Email	Phone
Work phone	Mobile phone

Email zagg.dave3@gmail.com	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 ▼ +

Select a contact

Tony Grant

Mobile phone	Fax
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Notes
Type your notes here



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

The screenshot shows the iamproperty CRM interface. At the top, there's a navigation bar with 'iamproperty', 'CRM', 'movebutler', and 'iamsold'. Below this is a sidebar with 'My day', 'Lettings', 'Sales', 'Accounts', 'Reporting', and 'Communications'. The main area is divided into two sections: 'Vendor's Solicitor' and 'Purchaser's Solicitor'. Each section has a '+ Add Solicitor' button. In the 'Purchaser's Solicitor' section, the '+ Add Solicitor' button is highlighted with an orange circle. The 'Vendor's Solicitor' section shows a form with fields for Solicitor, Contact, Address, Email, Phone, Mobile phone, and Fax. The 'Purchaser's Solicitor' section shows a similar form with fields for Solicitor, Contact, Address, Email, Phone, Mobile phone, and Fax.

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

The screenshot shows a modal form titled 'Add New Solicitor'. The form has a close button (X) in the top right corner. The fields are: 'Company Name' (highlighted with an orange circle), 'Title' (a dropdown menu with 'Select Title' as the placeholder), 'Forename', 'Surname', 'Phone', 'Mobile phone', 'Email', 'Fax', 'Website', and 'DX Number'. Below these fields is a section labeled 'Information' containing 'Postcode' and 'Address' fields. At the bottom of the modal, there are 'Cancel' and 'Add Solicitor' buttons.

18 Click "Add Solicitor"

Add New Solicitor

Information

Postcode

Address

Notes

B **I** **U** **•**

Type notes here.....

Cancel Add Solicitor

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

ing

Vendor's Solicitor

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

Contact
John Edgar

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

Email
zaggg.dave@gmail.com

Phone
01325464645

Mobile phone

Fax

Purchaser's Solicitor

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

Contact
Tony Grant

Address
Bakery Flat Pitt House, Broad Street, Lyme Regis, Dorset, DT17 3QF

Email
TG@hotmail.com

Phone

Mobile phone
098787654

Fax

Notes
Type your notes here

+

Add New Contact ✕

Company Name
Lymeby Solicitors - Bakery Flat Pitt House, Broad Stre

Title
Select Title ▼

Forename * **Surname** *

Phone **Mobile phone**

Email * **Fax**

Cancel Add Contact

Add New Contact ✕

Company Name
Lymeby Solicitors - Bakery Flat Pitt House, Broad Stre

Title
Select Title ▼

Forename * **Surname** *

Phone **Mobile phone**

Email * **Fax**

Cancel Add Contact