

Accessing Sales Compliance in CRM



This guide provides step-by-step instructions for accessing Sales Compliance within the CRM system, ensuring users can efficiently navigate the platform. By following these clear directions, users can quickly locate and verify necessary sales compliance documents, improving their workflow and ensuring regulatory adherence. It is essential for anyone involved in sales or compliance to understand these processes to maintain accuracy and efficiency in their operations.

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

The screenshot shows the CRM MyDay dashboard. At the top, there is a navigation menu with options: My day, Lettings, Sales, Accounts, Reporting, and Communications. A search icon, a calendar icon, a notification bell, and a magnifying glass are also present. On the right, there is a 'My account' button. Below the navigation, a large heading reads 'Welcome back, Training'. Underneath, there are three buttons: '+ Add New Record', 'View property management', and 'Visit help centre'. A search bar labeled 'Search all records' is positioned below these buttons. The dashboard is divided into two main sections: 'Today's events' and 'My tasks'. 'Today's events' shows a table with one entry: '12:00 Test test'. 'My tasks' shows a table with four tasks, all with a status of 'Not Started' and a priority of 'High'.

Time	Name
12:00	Test test

Status	Name	Priority	Start date	Due date
Not Started	Contact Landlord re renewal	High	12/Jun/2025	14/Jun/2025
Not Started	Call back	High	03/Jan/2025	03/Jan/2025
Not Started	Make Tea	High	07/Jan/2025	07/Jan/2025
Not Started	Clean Windows	High	28/Jan/2025	28/Jan/2025

2 Click "Sales"

The screenshot shows the IAM Property CRM dashboard. The top navigation bar includes the logo, 'My day', 'Lettings', 'Sales' (highlighted with an orange circle), 'Accounts', 'Reporting', and 'Communications'. A search bar and 'My account' are on the right. The main heading is 'Welcome back, Training'. Below it are buttons for '+ Add New Record', 'View property management', and 'Visit help centre'. A search bar for records is present. Two panels are visible: 'Today's events' with a table showing a test record at 12:00, and 'My tasks' with a table of tasks.

Time	Name
12:00	Test test

Status	Name	Priority	Start date	Due date
Not Started	Contact Landlord re renewal	High	12/Jun/2025	14/Jun/2025
Not Started	Call back	High	03/Jan/2025	03/Jan/2025
Not Started	Make Tea	High	07/Jan/2025	07/Jan/2025

3 Click "Sales Compliances"

The screenshot shows the IAM Property CRM dashboard with the 'Sales Compliances' menu item highlighted. The top navigation bar is the same as in the previous screenshot. The main content area is a grid of menu items: 'Solicitors', 'Property Match', 'Applicant Match', 'Reports', 'Marketing toolkit' (with a 'New' button), 'Sales Progression', 'Upload to portals', 'Sales Compliances' (highlighted with an orange circle), and 'E-sign'. A partial view of the 'My tasks' table from the previous screenshot is visible at the bottom.

Not Started	Call back	High	03/Jan/2025	03/Jan/2025
Not Started	Make Tea	High	07/Jan/2025	07/Jan/2025
Not Started	Clean Windows	High	28/Jan/2025	28/Jan/2025

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This will take you to the Compliance screen. This screen will show all properties and Vendors in your CRM and their progress through the movebutler process.

Explore your sales compliances

Search as you type using name or address below. Use the checkboxes to filter the results (archived results are only returned when checked) **all** returns everything

Lettings Properties Landlords Tenants Lettings Applicants Contractors Guarantors Sales Properties Vendors Sales Applicants Solicitors

Sales Compliance 93

Search in Sales Compliances

Search

" returns 93 Records

Property Address	Branch	Negotiator	Contact Name	Contact Type
1 Kingsway, Darlington	Morgan & Co			
1 Kingsway, Darlingtondl3ey	Morgan & Co			
1 Park View Road, Witney, Oxfordshire, OX28 1GA, UK	Henry & Co	Ian Henry		
1 Pelaw Crescent, Chester le Street	Morgan & Co			
1 St. Clare's Court, Darlington	Morgan & Co			
1 Verity Rise, Darlington, County Durham, DL3 0YB, UK	Morgan & Co	David-George Morgan		
1 Verity Rise, Darlington, County Durham, DL3 0YB, UK	Morgan & Co	David-George Morgan		



Tip! if there are multiple Vendors for a Property there will be a line for each vendor.

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If there are multiple Vendors for a Property there will be a line for each vendor.

Property Address	Branch	Negotiator	Contact Name	Contact
1 Kingsway, Darlington	Morgan & Co			
1 Kingsway, Darlington/13ey	Morgan & Co			
1 Park View Road, Witney, Oxfordshire, OX28 1GA, UK	Henry & Co	Ian Henry		
1 Pelaw Crescent, Chester le Street	Morgan & Co			
1 St. Clare's Court, Darlington	Morgan & Co			
1 Verity Rise, Darlington, County Durham, DL3 0YB, UK	Morgan & Co	David-George Morgan		
1 Verity Rise, Darlington, County Durham, DL3 0YB, UK	Morgan & Co	David-George Morgan		
1 Woolbrook Meadows, Sidmouth	Turvey & Co			
1 Yellowrattle Way, Philadelphia, Houghton Le Spring	Morgan & Co			
1 Yew Tree Close, Hurworth, Darlington, Durham, DL2 2HX, UK	Morgan & Co	David-George Morgan		
1091 Pelaw Crescent, Chester le Street, County Durham, DH2 2HX, UK	Morgan & Co	Training Dave		
111 Kingsway, Darlington	Morgan & Co			
112 Yew Tree Close, Hurworth on Tees, Darlington	Morgan & Co			
1125 Kingsway, Darlington	Morgan & Co			

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Columns can be sorted by clicking the header for the column, in this case Compliance Status, and the whole list will be sorted by the header subject.

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property My day Lettings Sales Accounts Reporting Communications My account

Property Address	Branch	Negotiator	Contact Name	Contact Type	Compliance Sta... ↓
Yew Tree Close, Hurworth, Darlington	Morgan & Co	Training Dave	Mr David George Morgan	seller	Verified
Seaton Charles Way, Seaton	Turvey & Co		Mr Stephen Turvey	seller	Verified
Seaton Charles Way, Seaton	Turvey & Co		Mr Frank Bruno	buyer	Verified
Silver Street, Lyme Regis	Turvey & Co		Mr Harry Kane	seller	Verified
Silver Street, Lyme Regis	Turvey & Co		Mr Sales 1 Poppy	buyer	Verified
Witney View Road, Witney	Henry & Co	Ian Henry	Mr Robert De Niro	seller	Verified
Witney View Road, Witney	Henry & Co	Ian Henry	Mr Chris Hemsworth	seller	Verified
Witney View Road, Witney	Henry & Co	Ian Henry	Mr Matt Bourne Damon	buyer	Verified
Chester le Street Pelaw Crescent, Chester le Street	Morgan & Co		Ms Sales applicant65	seller	Verified
Hurworth Yew Tree Close, Hurworth, Darlington	Morgan & Co		Mr David-George Morgan	buyer	Incomplete
Darlington Lackthorn Drive, Hurworth, Darlington	Morgan & Co		Miss Brooke Morgan	buyer	Incomplete

7 the additional information that can be viewed.

Compliance Sta... ↓	Contact Risk Level	Date Property Added	Date Instructed	Status	Advertising Status
Verified	low	11/01/2024		For Sale	
Verified	low	01/05/2025			
Verified	low	01/05/2025			
Verified	low	27/03/2023		Under Offer	Available
Verified	low	27/03/2023		Under Offer	Available
Verified	low	11/05/2023	22/05/2023	Agent can use this ...	Under Offer
Verified	low	11/05/2023	22/05/2023	Agent can use this ...	Under Offer
Verified	low	11/05/2023	22/05/2023	Agent can use this ...	Under Offer
Verified	low	07/03/2025	07/03/2025		
Incomplete	Incomplete	31/10/2023		For Sale	
Incomplete	low	27/03/2023	01/06/2023	Sold	Available
Incomplete	medium	27/03/2023		For Sale	Available
Incomplete	low	27/03/2023			Sold - SSTC
Incomplete	low	25/04/2025			

Property Record

8 The compliance status can also be seen in the Property Record. In the compliance screen and Contacts Click "Compliance"

The screenshot displays the 'Property Record' interface. On the left, a sidebar menu includes 'Details', 'Checklist', 'Appraisals', 'Compliance' (highlighted with an orange circle), 'Information', 'Stats', 'Marketing', 'Media', 'Rooms', and 'Portals'. The main content area is divided into several sections: 'PROPERTY PICTURES' with an 'Upload' button and a photo of a brick house; 'Property Address' with fields for 'Postcode' (DL2 2HX) and 'Address' (16 Yew Tree Close, Hurworth, Darlington, Durham, DL2 2HX, UK); 'Price/Instructed Date' with a 'Prefix' dropdown set to 'Fixed Price' and a 'Price (GBP)' field set to '380,000'; 'Solicitor/Conveyancing' with a '+Add Solicitor' button and fields for 'Solicitor Instructed' (a toggle switch), 'Instructed Date', 'Solicitor', and 'Contact'; and 'Fees/Contract' with an 'Instructed Date' field.

9 You can see the documents created in movebutler and view these.

The screenshot displays a property portal interface. On the left is a navigation menu with options: 1 Viewings, 0 Offers, Details, Checklist, Appraisals, Compliance, Information, Stats, Marketing, Media, Rooms, Portals, and Viewings. The main content area features two energy efficiency rating cards: a green card for 'Potential B (81-91)' with a score of 85, and a grey card for 'Potential G (1-20)' with a score of 0. To the right is an 'Additional EPC Information' section with fields for 'RRN Number' and 'Expiry date'. Below this is a 'Movebutler Compliance Documents' table:

	File Name	Contact	File Type	Date Added
View	david-morgan-280...	Mr David George M...	full_aml_search	2025-04-15 17:48
View	David_Morgan_274...	Mr David George M...	client_risk_assessm...	2025-04-15 17:26

10 Click "Contacts"

The screenshot shows a property portal interface for a specific property: '16 Yew Tree Close, Hurworth, Darlington, DL2 2HX | Fixed Price £380,000 | 4 beds | 3 baths'. The 'Contacts' menu item is highlighted in the left sidebar. The main content area displays document management options, including a '+ Add Document' button, a 'Sort Documents' dropdown, a search bar, and a 'Clear filters' link. Below these are two rows of document cards, each representing a 'LandlordStatement-Landlord4-...' PDF file with its size and date added. The 'Documents' section also includes 'Upload to Portals' and 'Statement' buttons.

11 The contact card will show the current status of the Vendor and applicant.

The screenshot shows a vendor contact card within a real estate application. The card is displayed in a list view, with a filter overlay on the left. The card itself features a purple circular profile picture with the initials 'DM'. Above the name, there are two green status tags: 'Compliance Verified' with a checkmark and 'Low Risk' with a minus sign. The card displays the name 'David morgan', the email address 'david.morgan10@iampr...', and the phone number '07885464639'. The background of the application is a teal-to-blue gradient. At the top, there is a header with the address '16 Yew Tree Close, Hurworth, Darlington, DL2 2HX', a fixed price of '£ 380,000', and icons for a calendar, a list, and a location pin. A 'Lead vendor: Mr. David Morgan' section is also visible, along with a 'View Vendors' button. The bottom of the card has a blue bar with a white minus sign. The filter overlay on the left includes a 'Sort Contacts' dropdown, a search bar, and a 'Clear filters' link.