

Adding 'Non Registered Buyer' Contact Information in Sales Progression Records (Chain)



Learn how to efficiently update details in the Chain for progression contacts not registered with your Company or branch, within the sales progression system. For example the purchaser of the property your purchaser is selling, as well as their details.

This guide provides a quick walk through for modifying contact information to ensure your property records remain accurate and up-to-date.



The chain can be accessed a few ways in CRM, from the Sales Progression menu option, the Offer, or the Sales Dashboard. Once in the Properties Progression record the process is the same.

1

Using the Progressions Menu Option

2 Using the Progressions option in the top (Sales) menu.

Click "Sales".

The screenshot shows the iamproperty CRM dashboard. The top navigation bar includes 'My day', 'Lettings', 'Sales' (highlighted with an orange circle), 'Accounts', 'Reporting', and 'Communications'. Below the navigation bar, the main heading is 'Welcome back, Training'. There are three buttons: '+ Add New Record', 'View property management', and 'Visit help centre'. A search bar is present with the text 'Search all records'. Below the search bar, there are two sections: 'Today's events' and 'My tasks'. The 'Today's events' section shows a list of events with columns 'Time' and 'Name'. The 'My tasks' section shows a table with columns 'Status', 'Name', 'Priority', 'Start date', and 'Due date'.

Time	Name
08:00	Jemmas 8-4.30
08:15	Viewing: 162 Yew Tree Close, Hurworth, Darlington, Durham, DL2 2HX, UK
12:00	Test test

Status	Name	Priority	Start date	Due date
Not Started	Call Audrey	High	08/Oct/2025	08/Oct/2025
Not Started	test	High	24/Oct/2025	24/Oct/2025
Not Started	Visit	High	28/Oct/2025	28/Oct/2025

3 Click "Sales Progression"

The screenshot shows the 'Sales Progression' page in the CRM. The top navigation bar includes 'My day', 'Lettings', 'Sales' (highlighted with an orange circle), 'Accounts', 'Reporting', and 'Communications'. Below the navigation bar, there is a large blue header. The main content area is divided into two columns. The left column contains links for 'Solicitors', 'Property Match', 'Applicant Match', 'Reports', and 'Marketing toolkit'. The right column contains links for 'Sales Progression' (highlighted with an orange circle), 'Upload to portals', 'Sales Compliances', and 'E-sign'. At the bottom, there is a table with columns 'Status', 'Name', 'Priority', 'Start date', and 'Due date'.

Status	Name	Priority	Start date	Due date
Not Started	test	High	24/Oct/2025	24/Oct/2025
Not Started	Visit	High	28/Oct/2025	28/Oct/2025

4

Click the **"Search for property (Press '/' to start searching)"** field and enter the details of the property you are searching for.

The screenshot shows the iamproperty CRM dashboard. The top navigation bar includes links for 'My day', 'Lettings', 'Sales', 'Accounts', 'Reporting', and 'Communications'. A search bar at the top right contains the text 'Search for property (Press '/' to start searching)'. On the left, there is a 'Filters' sidebar with options for 'Sort by' (set to 'Furthest from Completion'), 'Negotiators' (set to 'Negotiator'), and 'Status' (with checkboxes for 'In Progress', 'Completed', 'Pending', and 'Lost/Withdrawn'). An 'Update Results' button is at the bottom of the filters. The main content area displays a list of property records, each with a progress bar showing stages: Offer Date, Solicitors Instructed, Searches Ordered, Mortgage Offer, Searches Back, Contracts Exchanged, and Completion. The first record is dated 04/08/2023 and the second is dated 23/01/2025. The search bar is highlighted with an orange circle.

5

Click on the record to move to the specific progression

This screenshot shows the same iamproperty CRM dashboard as the previous one, but with the 'Searches Ordered' stage of the first record (dated 04/08/2023) highlighted with an orange circle. The interface elements, including the top navigation, filters sidebar, and list of records, are identical to the previous screenshot. The progress bar for the first record shows the following stages: Offer Date (04/08/2023), Solicitors Instructed, Searches Ordered (highlighted), Mortgage Offer, Searches Back, Contracts Exchanged, and Completion.

6 To Access from 'Offers'

7 Click "Offers"

The screenshot displays the 'iam property' web application. The top navigation bar includes links for 'My day', 'Lettings', 'Sales', 'Accounts', 'Reporting', and 'Communications'. A sidebar on the left lists various features: Marketing, Media, Rooms, Portals, Viewings, Offers (highlighted with an orange circle), NOI, Enquiries, Key Control, Sub-Agent, Contacts, and Documents. The main content area shows a property listing for 'The Green, Newsham, Richmond, DL11 7RD' with a price of 'Offers In Excess Of £ 274,950'. It also displays a lead vendor 'Mr. James Morgan' and a 'View Vendors' button. Below the listing, there are sections for 'PROPERTY PICTURES' with an 'Upload' button, 'Content Approval' with a status 'Vendor has approved this content', and 'Property Address' with fields for 'Postcode' (DL11 7RD) and 'Address' (The Green, Newsham, Richmond, North Yorkshire, DL11 7RD).

8 Click the "i" icon, marked as 'Progress Info'.

The screenshot displays a web application interface for managing offers. On the left is a sidebar with navigation options: Marketing, Media, Rooms, Portals, Viewings, Offers (highlighted), NOI, Enquiries, Key Control, Sub-Agent, Contacts, Documents, and Journal. The main area is divided into three sections. The top section has a '+ Add Offer' button and a '2 offer(s)' indicator. The middle section contains a 'Sort Offers' dropdown, a 'Date Range' filter (01/04/2023 - 01/10/2023), a search bar, and a 'Clear filters' link. The bottom section shows a 'Status' filter with options: Accepted (1), Declined (1), Fallen Through (0), Pending (0), Under Offer (0), and Withdrawn (0). The right section displays two offer cards. The first card, 'Offer Accepted', shows a date of 16 Nov 2023 @ 13:40, a value of £ 300000.00, and an offer made on 01 Sep 2023 @ 16:49. The second card, 'Offer Declined', shows a date of 01 Sep 2023 @ 16:48, a value of £ 20000.00, and an offer made on 04 Aug 2023 @ 10:52. Both cards list the contact 'Mr John Alfred Morgan' with email 'zagg.dave@gmail.com' and phone '07123456789'. Each card has a 'View John Alfred Morgan' button and a 'View Offer History' button. An orange circle highlights the 'i' icon in the 'Progress Info' tooltip on the first offer card.

9 From here onward all processes are the same.

10 Click "Chain"

Conveyancing

Chain

Journal

Audit

< Previous Sale

Purchaser
John Alfred Morgan
 07123456789, 07123456789

Vendor
James Morgan
 07711225566, 07711225566

£300,000 - The Green, Newsham, Richmond, North Yorkshire, DL11 7RD, UK

Offer Accepted 16/11/2023	Solicitor Instructed 16/11/2023	Searches Ordered 24/09/2025	Mortgage Offer 22/07/2025	Searches Back 15/10/2025	Contracts Exchanged 24/11/2023	Completed 01
Sellers Solicitor Instructed Offer Accepted +2 days 03/09/2023 16/11/2023						
Buyers Solicitor Instructed Offer Accepted +2 days 03/09/2023 16/11/2023						
Memorandum of Sale Sent Offer Accepted +3 days 04/09/2023 16/11/2023						

11 Click here to add the detail for the purchasers chain. .

Conveyancing

Chain

Journal

Audit

Property Address

33333 Kingsway, Darlington, County Durham, DL1 3EY, UK

Vendor

Jame Gray
012222

Purchaser

Pamela Green
123456789

Property Address

97 Yew Tree Close, Hurworth, Darlington, Durham, DL2 2H...

Vendor

Pamela Green
123456789

Purchaser

David Morgan

Vendor

Jame Gray
012222

Purchaser

Pamela Green
123456789

Property Address

33333 Kingsway, Darlington, County Durham, DL1 3EY, UK

Vendor

Jame Gray
012222

Purchaser

Pamela Green
123456789

Property Address

97 Yew Tree Close, Hurworth, Darlington, Durham, DL2 2H...

Vendor

Pamela Green
123456789

Purchaser

David Morgan

Vendor

Jame Gray
012222

Purchaser

Pamela Green
123456789

12

There is an identical option to the right side to add a record to the Vendor side of the chain.

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My day Lettings Sales Accounts Reporting Communications

My account

97 Yew Tree Close, Hurworth, Darlington, Durham, DL2 2H...

Vendor: Pamela Green 123456789 (PG)

Purchaser: David Morgan (DM)

This denotes the main record in the chain

Vendor: Jame Gray 012222 (JG)

Purchaser: Pamela Green 123456789 (PG)

Property Address

Postcode: DL2 2HX

Address: [Empty]

Vendor Estate Agent

Agent: ovhomes.com (Morgan & ...)

Contact: Natalie Portman

Email: [Empty]

Phone: [Empty]

13

This will create this new screen, which has the purchaser of your property shown as the Vendor of their own property.

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My day Lettings Sales Accounts Reporting Communications

My account

158 Yew Tree Close, Hurworth, Darlington, Durham, DL22HX...

Vendor: David Morgan (DM)

Purchaser: [Empty]

97 Yew Tree Close, Hurworth, Darlington, Durham, DL2 2HX...

Vendor: Pamela Green 123456789 (PG)

Purchaser: David Morgan (DM)

33333 Kingsway, Darlington, County Durham, DL1 3EY, UK

Vendor: Jame Gray 012222 (JG)

Purchaser: Pamela Green 123456789 (PG)

Conveyancing

Chain

Journal

Audit

Property Address

Postcode: DL22HX

Address: 158 Yew Tree Close, Hurworth, Darlington, Durham, DL22HX

Vendor Estate Agent

Agent: [Empty]

Contact: [Empty]

Email: [Empty]

Phone: [Empty]

14

If known the details of the Agent for your Purchaser (now shown as Vendor) can be entered.

The screenshot shows the 'property' app interface. At the top, there's a navigation bar with 'My day', 'Lettings', 'Sales', 'Accounts', 'Reporting', and 'Communications'. Below this, there are two agent cards: 'David Morgan' (DM) and 'Pamela Green' (PG) with a phone number '123456789'. The main form has several sections: 'Property Address' with 'Postcode' (DL22HX) and 'Address' (158 Yew Tree Close, Hurworth, Darlington, Durham, DL22HX); 'Vendor Estate Agent' (highlighted with an orange box) with 'Agent' and 'Contact' dropdowns, and 'Email' and 'Phone' text fields; 'Vendor' with 'Title' (Mr), 'Forename' (David), 'Surname' (Morgan), 'Company Name', 'Email' (david.morgan@iamproperty.com), and 'Phone'; and 'Purchaser' with 'Title' (Lord), 'Forename' (James), 'Surname' (Ropner), 'Company Name', 'Email' (test@test.com), and 'Phone' (01325412365). A 'Find' button is next to the 'Purchaser' section.

15

Scroll down the screen and in the 'Purchaser' side of the screen, add their details. Select purchaser's title and enter full name, email address, and phone numbers. Up to two purchasers can be added.

If you wish to email the new contact, then click on the email icon just above the purchaser details.

Scrolling further down the screen will allow the Solicitor details to be added as well as any notes that are required.

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property

My dayLettingsSalesAccountsReportingCommunications

My account

DL22HX

Address158 Yew Tree Close, Hurworth, Darlington, Durham, DL22HX

EmailPhone

VendorLinked Record

TitleMrForenameDavid

SurnameMorganCompany Name

Emaildavid.morgan@iamproperty.comPhone

Work phone01865860873Mobile phone0711123456

PurchaserManually EnteredFind

TitleForename

SurnameCompany Name

EmailPhone

Work phoneMobile phone

Vendor 2Manually EnteredFind

TitleForename

SurnameCompany Name

EmailPhone

Work phoneMobile phone

Purchaser 2Manually EnteredFind

TitleForename

SurnameCompany Name

EmailPhone

Work phoneMobile phone

DL22HX

Address158 Yew Tree Close, Hurworth, Darlington, Durham, DL22HX

EmailPhone

VendorLinked Record

TitleMrForenameDavid

SurnameMorganCompany Name

Emaildavid.morgan@iamproperty.comPhone

Work phone01865860873Mobile phone0711123456

PurchaserManually EnteredFind

TitleForename

SurnameCompany Name

EmailPhone

Work phoneMobile phone

Vendor 2Manually EnteredFind

TitleForename

SurnameCompany Name

EmailPhone

Work phoneMobile phone

Purchaser 2Manually EnteredFind

TitleForename

SurnameCompany Name

EmailPhone

Work phoneMobile phone

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property My day Lettings Sales Accounts Reporting Communications

DL22HX

Address
158 Yew Tree Close, Hurworth, Darlington, Durham, DL22HX

Email Phone

Vendor Linked Record

Title Mr Forename David

Surname Morgan Company Name

Email david.morgan@iamproperty.com Phone

Work phone 01865860873 Mobile phone 0711123456

Purchaser Manually Entered Find

Title Lord Forename

Surname Company Name

Email Phone

Work phone Mobile phone

Vendor 2 Manually Entered Find

Title Forename

Purchaser 2 Manually Entered Find

Title Forename

16 Click 'Save' to save the data and update the chain details.