

Completing a Sales Property Details screen.



Learn the necessary steps to successfully complete the 'Details'; screen for your property and start the process of adding it to the sales property stock. This guide will help you manage vendor details, instructed dates, and conveyancing information efficiently.

1

If the 'Appraisal' tag is on (green) click **"Appraisal"** to turn it off to show the property has been appraised.

The screenshot shows the 'Details' screen for a property. The top navigation bar includes 'iamproperty', 'CRM', 'movebutler', and 'iamsold'. The main header has 'My day', 'Lettings', 'Sales', 'Accounts', 'Reporting', and 'Communications'. The property details section shows the address '72999 Pelaw Crescent, Chester le Street, DH2 2HX' and a price of '£ 0'. The 'Appraisal' tag is highlighted with a red circle. Below the property details, there are sections for 'PROPERTY PICTURES' and 'Property Address'. The 'Property Address' section includes fields for 'Postcode' (DH2 2HX) and 'Address' (72999 Pelaw Crescent, Chester le Street, County Durham, DH2 2HX, UK).

2 Select **"Price/Instructed Date"** section and set the prefix and the property price.

The screenshot shows a web form for listing a property. On the left is a 'PROPERTY PICTURES' section with an 'Upload' button and a 'Start' button. On the right is a 'Property Address' section with fields for 'Postcode' (DH2 2HX) and 'Address' (72999 Pelaw Crescent, Chester le Street, County Durham, DH2 2HX, U). Below the address is the 'Price/Instructed Date' section, which is highlighted with an orange box. This section includes a 'Currency' dropdown set to 'GBP', a 'Prefix' dropdown with a document icon, and a 'Price (GBP)' field with a pound symbol and the number '0'. Below these are two more fields: 'Instructed Date' and 'Date Notice to Withdraw Given', both with calendar icons. At the bottom left is a 'Solicitor/Conveyancing' section with an '+Add Solicitor' button.

3 Click **"Instructed Date"** to add the date the property was instructed.

This screenshot is identical to the one above, but with an orange box highlighting the 'Instructed Date' field in the 'Price/Instructed Date' section. The field has a calendar icon on the left and is currently empty. The rest of the form, including the 'Property Address', 'Price/Instructed Date' controls, and 'Solicitor/Conveyancing' section, remains the same.

4

Click **"Fees/Contract"** and add in all the details for the selling fees and contract type. If you add an expiry date for the sales contract a reminder will show in the sales activity list.

The screenshot shows the 'property' dashboard with a navigation bar at the top containing 'My day', 'Lettings', 'Sales', 'Accounts', 'Reporting', and 'Communications'. On the left, there is a sidebar with a price range of '£ 500,000' and a list of items. The main content area is divided into two panels. The left panel is titled 'Solicitor/Conveyancing' and contains a '+Add Solicitor' button, a 'Solicitor Instructed' toggle, an 'Instructed Date' field, a 'Solicitor' dropdown, a 'Contact' dropdown with a '+' button, an 'Address' field, an 'Email' field, a 'Phone' field, a 'Mobile phone' field, and a 'Fax' field. The right panel is titled 'Fees/Contract' and is highlighted with an orange box. It contains a 'Contract Type' dropdown, a 'Contract Expires' field, a 'Fee Amount' field with '£ 0.00', a '%' sign, a '£' sign, a 'Commission' field with '£ 0.00', a '%' sign, a '£' sign, a 'Solicitor Referral Fees' field with '£ 0.00', and a 'Property Marketing Fees' field with '£ 0.00'. Below this, there is a 'COMMERCIAL' section with a 'Commercial Unit' field and a toggle switch.

5

If you have the information for the Vendors Solicitor. Click "+Add Solicitor" button and add the details here. This will be copied into the Progression when required.

The screenshot shows the 'iam property' dashboard with a navigation bar at the top containing 'My day', 'Lettings', 'Sales', 'Accounts', 'Reporting', and 'Communications'. On the left, there is a sidebar with a price range of '£ 500,000' and a list of items. The main content area is divided into two panels. The left panel is titled 'Solicitor/Conveyancing' and is highlighted with an orange box. It contains a '+Add Solicitor' button, a 'Solicitor Instructed' toggle, an 'Instructed Date' field, a 'Solicitor' dropdown, a 'Contact' dropdown with a '+' button, an 'Address' field, an 'Email' field, a 'Phone' field, a 'Mobile phone' field, and a 'Fax' field. The right panel is titled 'Fees/Contract' and contains a 'Contract Type' dropdown, a 'Contract Expires' field, a 'Fee Amount' field with '£ 0.00', a '%' sign, a '£' sign, a 'Commission' field with '£ 0.00', a '%' sign, a '£' sign, a 'Solicitor Referral Fees' field with '£ 0.00', and a 'Property Marketing Fees' field with '£ 0.00'. Below this, there is a 'COMMERCIAL' section with a 'Commercial Unit' field and a toggle switch.