

Using Portal Enquiries in CRM



This guide walks you through the process of using the Portal Enquiries feature in the Activity List.

In this guide we look creating a new sales applicant record within the CRM Lettings and Sales dashboards. Following these steps will help you to efficiently manage your portal enquiries and streamline your lead tracking.

In this guide we show a Sales enquiry, however the process is the same for Lettings.

1

Navigate to either the Sales or Lettings Dashboard. **Portal Enquiries** will show on the **'Activity List'**.

If there are no Portal Enquiries showing in the Activity List, there are none available to show in the timeframe you have set in the config or any at all.

The screenshot displays the 'iam property' CRM dashboard. The top navigation bar includes 'My day', 'Lettings', 'Sales', 'Accounts', 'Reporting', and 'Communications'. The main dashboard features several widgets: 'Properties' (91), 'Vendors' (92), 'Applicants' (51), 'Sales Progression' (47), 'Pending Offers' (8), 'Portals', and 'Key Control'. The 'Activity List' is visible on the left, and the 'Portal Enquiries' section is highlighted on the right. The 'Portal Enquiries' table shows a single entry for 'Training Dave'.

☐	Negotiator	Name	Portal	Date	Property
☐	Training Dave	Rightmove Tester	Rightmove	11/08/2026 09:51	8599 Pelaw Crescen

2

The information that is shown on a Portal Enquiry screen is;

- **Negotiator;** the person who is shown as the Negotiator on the Property Record
- **Name;** name of the enquirer
- **Portals;** the portal the enquiry is from
- **Date;** date and time of the enquiry

- **Property;** address of the property enquired about.
- **Phone;** contact number of enquirer.
- **Email;** email address of enquirer
- **Comments;** the comments that the enquirer has made on their enquiry.

Portal Enquiries ×







☐	Negotiator	Name	Portal	Date	Property	
	☐	Training Dave	Rightmove Tester	Rightmove	11/08/2026 09:51	8599 Pelaw Crescen

1 to 1 of 1

Page 1 of 1

Portal Enquiries ×





Search



	Phone	Email	Comments
⋮ reet, DH2 2HX	<u>09999 999 999</u> (Day), 09999 999 999 (Eve)	TEST+MC@iamprop...	Lorem ipsum dolor ...

◀▶◀

1 to 1 of 1

⏪ < Page 1 of 1 > ⏩

3 Behind the 3-dot menu are the following options;

- **View Enquiry**
- **Delete Enquiry**
- **View Property**

We will look at each of these options in the following screens.

The screenshot displays a dashboard with several key metrics at the top: Properties (91), Vendors (92), Applicants (51), Sales Progression (47), Pending Offers (8), Portals, and Key Control. Below these is an 'Activity List' on the left and a 'Portal Enquiries' table on the right. The 'Portal Enquiries' table has columns for Negotiator, Name, Portal, Date, and Property. A dropdown menu is open for the first row, showing options: View Enquiry, Delete Enquiry, and View Property.

Negotiator	Name	Portal	Date	Property
Training Dave	Rightmove Tester	Rightmove	11/08/2026 09:51	8599 Pelaw Cr

View Enquiry

4 Click "View Enquiry"

The dashboard features a top navigation bar with several widgets: Properties (91), Vendors (92), Applicants (51), Sales Progression (47), Pending Offers (8), Portals, and Key Control. Below this is an 'Activity List' on the left and a 'Portal Enquiries' table on the right. The 'View Enquiry' button is highlighted in the table's context menu.

Activity List

- Sales Applicant Checklist 4
- Applicants Not Contacted 21
- Appraisal Checklist 3
- Appraisals Requiring Conclusion 41
- Calls Upcoming/Outstanding 56
- EPC Due 2
- Keys Due Back 7

Portal Enquiries

☐	Negotiator	Name	Portal	Date	Property
☐	Training Dave	Rightmove Tester	Rightmove	11/08/2026 09:51	8599 Pelaw Cr

1 to 1 of 1 Page 1 of 1

5 This will show you the full details of the enquiry.

Clicking the **Record Type** dropdown will show the options to Add (Sale/Lettings) Applicant and Add Landlord/Vendor.

The 'Resolve enquiry' modal form displays the following details:

Enquiry

Name: Rightmove Tester
Email: TEST+MC@iamproperty.co.uk
Phone Number: 09999 999 999
Date of Enquiry: 11/08/2026 09:51
Address: 1 Test Road, ZX Land SW1V 2EX
Comment: Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua. Ut enim ad minim veniam, quis nostrud exercitation ullamco laboris nisi ut aliquip ex ea commodo consequat. Duis aute irure dolor in reprehenderit in voluptate velit esse cillum dolore eu fugiat nulla pariatur. Excepteur sint occaecat cupidatat non proident, sunt in culpa qui officia deserunt mollit anim id est laborum.

Record Type
Select Record Type

Create Record

Cancel Close Enquiry

Resolve enquiry [X]

Enquiry Property

Name: Rightmove Tester

Email: TEST+MC@iamproperty.co.uk

Phone Number: 09999 999 999

Date of Enquiry: 11/08/2026 09:51

Address: 1 Test Road, ZX Land SW1V 2EX

Comment: Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua. Ut enim ad minim veniam, quis nostrud exercitation ullamco laboris nisi ut aliquip ex ea commodo consequat. Duis aute irure dolor in reprehenderit in voluptate velit.

Record Type: Select Record Type

Select Record Type

Vendor

Sales Applicant

Create Record

Close Enquiry

6

Click **"Sales Applicant"** and then **"Create Record"** to open a partially completed Sales Applicant Record. If you are speaking to the applicant, continue and complete the record.

Clicking the Vendor option in 'Record Type' will create a Vendor record.

The same will happen if you are in a Lettings Portal Enquiry although creating a Lettings Applicant or Landlord.

Resolve enquiry [X]

Enquiry Property

Name: Rightmove Tester

Email: TEST+MC@iamproperty.co.uk

Phone Number: 09999 999 999

Date of Enquiry: 11/08/2026 09:51

Address: 1 Test Road, ZX Land SW1V 2EX

Comment: Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua. Ut enim ad minim veniam, quis nostrud exercitation ullamco laboris nisi ut aliquip ex ea commodo consequat. Duis aute irure dolor in reprehenderit in voluptate velit.

Record Type: Sales Applicant

Create Record

Cancel

Close Enquiry

Applicant Record

7

Click **"Sales Applicant"** then **'Create Record'** to create the applicant record. Click 'Save' to save the record.

Resolve enquiry

Enquiry

Property

Name

Rightmove Tester

Email

TEST+MC@iamproperty.co.uk

Phone Number

09999 999 999

Date of Enquiry

11/08/2026 09:51

Address

1 Test Road, ZX Land SWTV 2EX

Comment

Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua. Ut enim ad minim veniam, quis nostrud exercitation ullamco laboris nisi ut aliquip ex ea commodo consequat. Duis aute irure dolor in reprehenderit in voluptate velit.

Record Type

Sales Applicant

Create Record

Cancel

Close Enquiry

£0.00

44 08/09/2026

licants

RT

Rightmove Tester

TEST+MC@iamproperty.co.uk

09999 999 999

AP

Warning

Set GDPR

1 Test Road ZX Land,

📞

📠

🔒

💬

✉️

🏠

⋮

Reference:

Negotiator: Training Dave

Branch Morgan & Co

Status Active

Personal Information

Title

Forename Rightmove11

Surname Tester

Company Name

Website

Phone Number 09999 999 999

Work phone

Mobile phone 09999 999 999

Email Address TEST+MC@iamproperty.co.uk

Salutation

Source Rightmove

Temperature Hot

Applicant Address

Postcode SWTV 2EX

Address 1 Test Road ZX Land, , SWTV 2EX, UK

Edit manually

Vendor Record

8

Click **"Vendor"** then **'Create Record'** to create the Vendor (or Landlord) record

Resolve enquiry ✕

Enquiry Property

Name
Rightmove Tester

Email
TEST+MC@iamproperty.co.uk

Phone Number
09999 999 999

Date of Enquiry
11/08/2026 09:51

Address
1 Test Road, ZX Land SW1V 2EX

Comment
Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua. Ut enim ad minim veniam, quis nostrud exercitation ullamco laboris nisi ut aliquip ex ea commodo consequat. Duis aute irure dolor in reprehenderit in voluptate velit.

Record Type
Sales Applicant

Create Record

Select Record Type

Vendor

Sales Applicant

Close Enquiry

RT Rightmove Tester
TEST+MC@iamproperty.co.uk
09999 999 999

VE Warning Set GDPR

1 Test Road ZX Land

Reference: Negotiator: Training Dave Branch: Morgan & Co Status: Active

Personal Information

Title Forename Rightmove

Surname Tester Company Name

Salutation

Website Phone Number 09999 999 999

Work phone Mobile phone 09999 999 999

Email Address TEST+MC@iamproperty.co.uk Source Rightmove

Vendor Address

Address type Contact Postcode SW1V 2EX

Address
1 Test Road ZX Land, SW1V 2EX, UK

House 1 Test Road Line1 ZX Land

Line2 Town

County Country UK

9

Click **"Sales Applicant"** and then **"Create Record"** to open a partially completed Sales Applicant Record.

Clicking the Vendor option in 'Record Type' will create a Vendor record.

The same will happen if you are in a Lettings Portal Enquiry although creating a Lettings Applicant or Landlord.

Resolve enquiry ✕

Enquiry Property

Name
Rightmove Tester

Email
TEST+MC@iamproperty.co.uk

Phone Number
09999 999 999

Date of Enquiry
11/08/2026 09:51

Address
1 Test Road, ZX Land SW1V 2EX

Comment
Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua.
Ut enim ad minim veniam, quis nostrud exercitation ullamco laboris nisi ut aliquip ex ea commodo consequat. Duis aute irure dolor in reprehenderit in voluptate velit

Record Type
Sales Applicant ▼ **Create Record**

Cancel Close Enquiry

Property

10

Clicking the **"Property"** tab will show the details of the property the enquiry is related to.

Clicking on the blue icons will take you to the related property and owner records.

Resolve enquiry

Enquiry Property

Address
8599 Pelaw Crescent, Chester le Street

Price
£160000

Owner
Mr David Morgan

Beds
3

Baths
1

Description

Cancel Close Enquiry

Other Options

11

The other 2 options in the 3-dot menu are "**Delete Enquiry**" which will remove the enquiry from the 'Portals Enquiry' list and "**View Property**" which will open the property record.

The screenshot displays a web interface with a sidebar on the left containing a list of items with numbers and external link icons. The main area features a table with columns for 'Property' and 'Phone'. A 3-dot menu is open over the first row of the table, showing three options: 'View Enquiry', 'Delete Enquiry' (highlighted with an orange border), and 'View Property'. The table row shows the address '8599 Pelaw Crescent, Chester le Street, DH2 2HX' and a phone number '09999 999 999(Da...'. A pagination bar at the bottom right indicates '1 to 1 c'.

	Property	Phone
⋮	8599 Pelaw Crescent, Chester le Street, DH2 2HX	09999 999 999(Da...