

How To Use CRM Across Multiple Browser tabs

Within CRM there are occasion when the ability to use another screen is useful, for example a person rings up to book a viewing but you are in the middle of receipting in rents and cant move from the page you are on. Or, you need to reference between multiple pages.

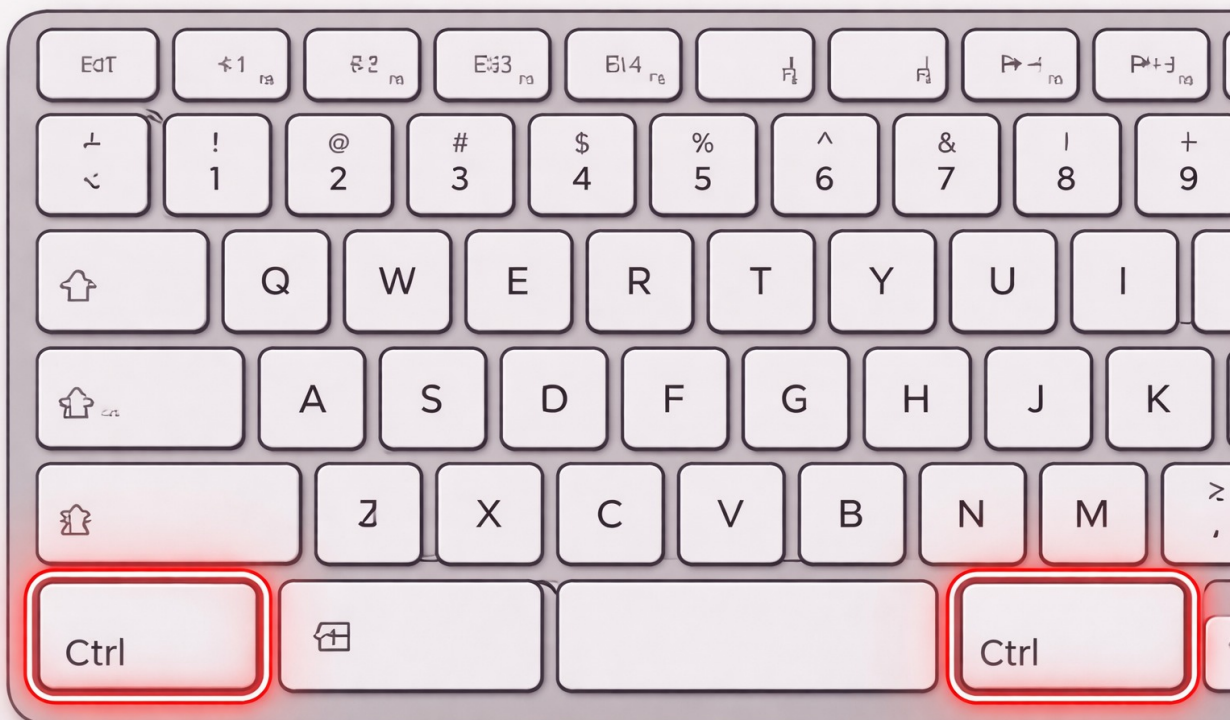
This guide will show how to open another screen easily and quickly allowing you to continue with your work.

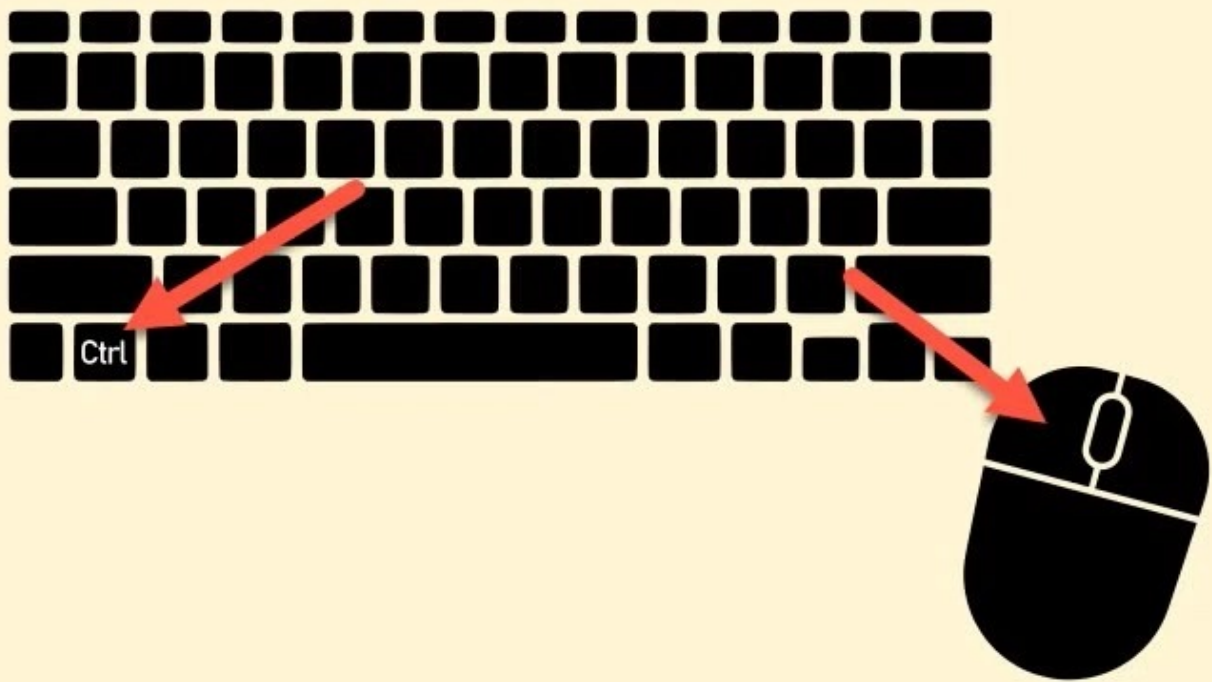
Where is the CTRL Key?

1 Position of CTRL/Control keys on a standard keyboard?

The CTRL or control key is bottom left and right of a standard UK keyboard layout. On an Apple MAC keyboard the key is in the same place, just called the CMD key.

You need to press and hold the Ctrl key and click the left mouse button at the same time.





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You can do this action from any screen in CRM and from most clickable links, we are using the My Day screen as an example.

On the **My Day** screen there are a few places where you might want to open a new screen. For example to view the Calendar, if you click on the calendar icon it will open over the screen you are in. However, if you press the CTRL keys on a your (windows) pc keyboard the calendar screen will open in a new screen so you can flip between screens and check calendars.

My day
Lettings ▾
Sales ▾
Accounts ▾
Reporting ▾
Communications ▾

 My account

Welcome back, Training

+ Add New Record
 View property management
 Visit help centre

Search all records

Today's events

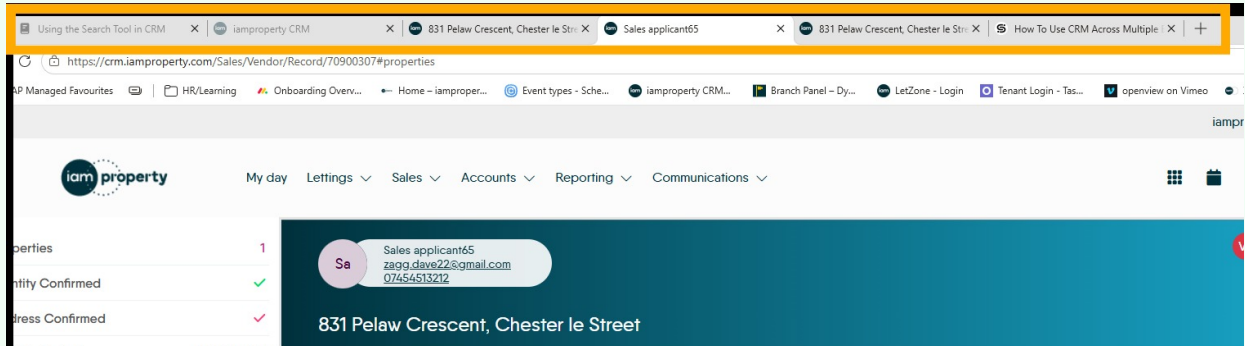
Time	Name
08:00	Jemmas 8-4.30
12:00	Test test
12:00	Test test
13:00	Viewing @ 88001 Pelaw Crescent DH2 2HX

My tasks

Status	Name	Priority	Start date	Due date
Not Started	Deliver leaflets	High	30/Jan/2026	07/Feb/2026
Not Started	deliver leaflets	High	06/Feb/2026	08/Feb/2026



Tip! These new new browser screens will open in the background, you wont automatically jump to the new screen the tab will show at the top of your CRM browser screen.



Examples of Supported Areas

3

Virtually every screen link supports this feature, where a clicked link doesn't open in a new screen and the link opens over the current screen you can use the browsers back arrow to move back to the original screen.

None of the menu options at the top of the CRM screen will open in a new screen if you 'ctrl+click'.

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Some of the areas that support Ctrl+click

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Click "Add New Record"

Ctrl + Click on any of the option on this screen and they will open in a new browser window/tab.

The screenshot displays the iamproperty CRM interface. At the top, the navigation bar includes the iamproperty logo, a menu with 'My day', 'Lettings', 'Sales', 'Accounts', 'Reporting', and 'Communications', and a user profile section with 'My account'. The main header area says 'Welcome back, Training'. Below this, there's a '+ Add New Record' button (highlighted with an orange box), a 'View property management' link, and a 'Visit help centre' link. A search bar labeled 'Search all records' is present. The interface is divided into two main sections: 'Today's events' and 'My tasks'. The 'Today's events' section shows a table with columns 'Time' and 'Name', listing events like 'Jemmas 8-4.30' and 'Test test'. The 'My tasks' section shows a table with columns 'Status', 'Name', 'Priority', 'Start date', and 'Due date', listing tasks like 'Deliver leaflets'. An 'Add New Record' modal is open in the center, showing options for 'Select appointment type' (Sales Appraisal, Lettings Appraisal, Sales Viewing, Lettings Viewing) and 'Select record type' (Sales Applicant, Lettings Applicant, Sales Property, Lettings Property, Landlord, Portfolio). The modal is also highlighted with an orange box.

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"Search" for a record using either the My Day screen or the 'magnifying glass icon' top right. Any of the results can be Ctrl+clicked to open in a new browser screen. E.G. Click "View Sales Property"

iamproperty
CRM
movebutler

iam property
My day
Lettings
Sales
Accounts
Reporting
Communications

+ Add New Record
View property management
Visit help centre

Search all records

Today's events

My tasks

iam property
pelaw

Sales Applicant 11
Lettings Applicant 1
Business 4
Contact 5
Landlord 21
Sales Property 42
Lettings Property 67
Tenancy 42
Tenant 37
Vendor 45

Show archived in results

Eddie Harlot
ed@charlotte.co
null

Fred Seller
fs@dmdm.tc
null

7683 Pelaw Crescent, DH2 2HX
Chester le Street, County Durham
£249000.00

831 Pelaw Crescent, DH2 2HX
Chester le Street, County Durham
£248999.00

Pelaw Crescent, DH22HX Chester le Street

Pelaw Crescent, DH22HX Chester le Street

View Contact

View Contact

View Sales Property

View Sales Property

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From the Property record. Click **"View Vendors"**
Ctrl + click on the **Vendor** name e.g. "Ms Sales applicant65"

property

My day Lettings Sales Accounts Reporting Communications

Refer for Auction

£ 248,000 ↑

831 Pelaw Crescent, Chester le Street, DH2 2HX |
Default £ 248,999 | 3 | 2

Lead vendor: Ms Sales applicant65

View Vendors

Reference Negotiator Training Dave Branch Morgan & Co

PROPERTY PICTURES Upload

Content Approval

Vendor has not approved this co

Search Vendors

CREATE NEW VENDOR EMAIL ALL SMS ALL

VIEW ALL

Ms Sales applicant65

zagg.dave22@gmail.com 07454513212

Cancel Save Vendor

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From the Vendor record, you can click the **"Properties"** menu. Then Ctrl + click on the blue highlighted part of the property tile to open the property record "831 Pelaw Crescent, Chester le Street"

Address Confirmed

Last Contacted 07/03/2025 11:19

831 Pelaw Crescent, Chester le Street

Reference:

Negotiator: Weekender One

Branch:

Details

Checklist

Properties

Contacts

Documents

Journal

E-Sign

Personal Information

Title Ms

Forename Sales

Surname applicant65

Company Name

Salutation Ms applicant65

Website

Phone Number 07454513212

Work phone

Mobile phone

Vendor

Address

Address 831 P

House 831

Line2

New Property

Sort Properties

Search

Clear filters

Bedrooms 0

Bathrooms 0

Receptions 0

Default £248,999.00



★★★★★ 0 Ratings

£248,999.00

831 Pelaw Crescent,...

Beds: 3 Baths: 2

Receptions: 2

Training Dave

10/09/2025

9 There are lots of other areas that support the Ctrl+click function