

New CRM Sales Property Header and Overview Page



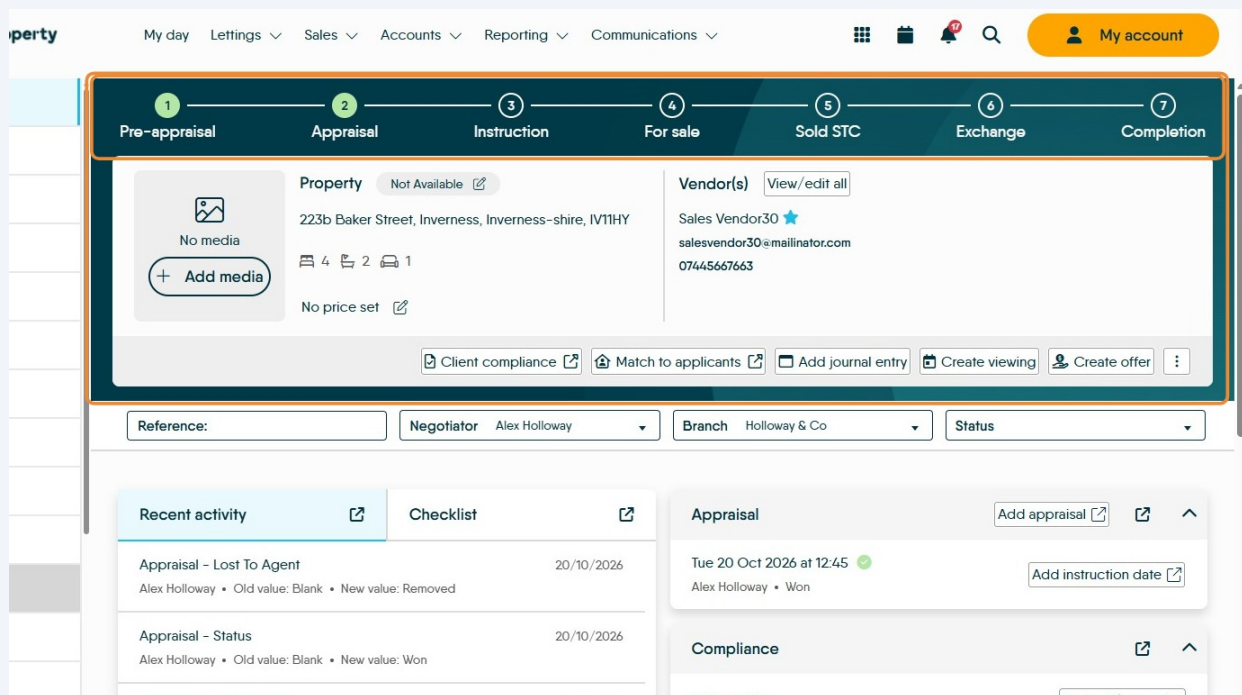
This guide showcases the features of the new CRM Overview screens. The Overview screens consist of 2 parts; - A new details screen and milestones indication - A new 'Overview' screen. Giving quick and easy access to key items that are used during a property sale. Through this guide we will look at each section individually and explain its use and benefits.

Milestones

1

The Milestones are the numbered dots at the top of the page header, these will update as the property progresses through the sale process, illuminating either amber or green. Certain icons will show as amber e.g. Appraisal, once an Appraisal is booked and until the booked date is passed will show amber, once the date is passed the marker turns green.

Hovering the mouse over a milestone will show the date related to that milestone.



My dayLettingsSalesAccountsReportingCommunications

My account

1Pre-appraisal2Appraisal3Instruction4For sale5Sold STC6Exchange7Completion

Appraisal: 20/10/2026 at 12:45

PropertyNot Available

No media

Add media

223b Baker Street, Inverness, Inverness-shire, IV1 1HY

421

No price set

Vendor(s)View/edit all

Sales Vendor30

salesvendor30@mailinator.com

07445667663

Client complianceMatch to applicantsAdd journal entryCreate viewingCreate offer

Reference:NegotiatorAlex HollowayBranchHolloway & CoStatus

Recent activity

Checklist

Compliance

Instruction Received57%

Property Preparation0%

Marketing Launch0%

EPC graphUpload/generate

Vendor(s) complianceView

Buyer(s) compliance

1Pre-appraisal2Appraisal3Instruction4For sale5Sold STC6Exchange7Completion

Instruction date: 27/10/2026

PropertyNot available

No media

Add media

223b Baker Street, Inverness, Inverness-shire, IV1 1HY

421

No price set

Vendor(s)View/edit all

Sales Vendor30

salesvendor30@mailinator.com

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Client complianceMatch to applicantsAdd journal entryCreate viewingCreate offer

Reference:NegotiatorAlex HollowayBranchHolloway & CoStatus

Recent activity

Checklist

Compliance

Instruction Received57%

Property Preparation0%

Marketing Launch0%

EPC graphUpload/generate

Vendor(s) complianceView

Buyer(s) compliance

Page Header

2

The main part of the header shows the property detail and the Vendor details.

From the property side of the screen media can be added, the property price and prefix set. You can also set the property advertising type.

There are also options to start the Client compliance (via movebutler) Match to applicants, Add journal entry, Create a viewing and Create an Offer

The screenshot displays a property management software interface. At the top, a progress bar shows seven stages: 1. Pre-appraisal, 2. Appraisal, 3. Instruction, 4. For sale, 5. Sold STC, 6. Exchange, and 7. Completion. The 'For sale' stage is currently selected.

The main content area is divided into two columns. The left column, labeled 'Property', shows 'Not Available' status, the address '223b Baker Street, Inverness, Inverness-shire, IV1 1HY', and icons for 4 bedrooms, 2 bathrooms, and 1 car. It also indicates 'No price set'. The right column, labeled 'Vendor(s)', shows 'Sales Vendor30' with a star icon, email 'salesvendor30@mailinator.com', and phone '07445667663'. A 'View/edit all' link is present.

Below these columns is a row of action buttons: 'Client compliance', 'Match to applicants', 'Add journal entry', 'Create viewing', 'Create offer', and a dropdown menu. These buttons are highlighted with an orange border in the original image.

Below the action buttons is a section with filters: 'Reference:' (empty), 'Negotiator' (Alex Holloway), 'Branch' (Holloway & Co), and 'Status' (dropdown).

The bottom section is divided into three main areas. On the left, 'Recent activity' shows a list of events: 'Instruction Received' (57%), 'Property Preparation' (0%), 'Marketing Launch' (0%), and 'Viewings' (0%). In the center, a 'Checklist' tab is active, showing a progress bar for 'Instruction Received' at 57%. On the right, there are sections for 'Appraisal' (with 'Add appraisal' button), 'Compliance', 'Prepare for listing', 'Portals' (with 'Remove from all' and 'Upload to all' buttons), and 'Viewings' (with '+ Add viewing' button).

3

The property price can be set from the header screen, click onto the '**No price set**' icon.

If required property images can be added here, using the +Add media option.

The screenshot shows the 'Pre-appraisal' screen with the following details:

- Property:** 223b Baker Street, Inverness, Inverness-shire, IV1 1HY. Status: Not Available.
- Vendor(s):** Sales Vendor30, salesvendor30@mailinator.com, 07445667663.
- Icons:** 4 (car), 2 (bicycle), 1 (motorcycle).
- Buttons:** + Add media, No price set (highlighted), Client compliance, Match to applicants, Add journal entry, Create viewing, Create offer.
- Form Fields:** Reference, Negotiator (Alex Holloway), Branch (Holloway & Co), Status.
- Recent activity:** Instruction Received (57%), Property Preparation (0%), Marketing Launch (0%), Viewings (0%).
- Checklist:** Appraisal, Compliance, Prepare for listing, Portals, Viewings.

4

To set the advertising status click the (in this case) **Not Advertised** option.

The screenshot shows the 'Instruction' screen with the following details:

- Property:** 223b Baker Street, Inverness, Inverness-shire, IV1 1HY. Status: Not Advertised (highlighted). Fixed Price: £500,000.
- Vendor(s):** Sales Vendor30, salesvendor30@mailinator.com, 07445667663.
- Buttons:** Client compliance, Match to applicants, Add journal entry, Create viewing, Create offer.
- Form Fields:** Reference, Negotiator (Alex Holloway), Branch (Holloway & Co), Status.
- Recent activity:** Asking Price Prefix (Just now), Price (Just now).
- Checklist:** Portals, Viewings.

5

This will open the '**Change advertising status**' screen. From the drop down menu choose your option e.g. Advertised
Select Available as the advertising status.

If, in this screen you set the '**For sale?**' option to yes, the option to upload the property to the online portals will become available.

If the upload to portals option has been selected the next screen you will see is the '**Upload/remove from portals**' screen where you can upload the property to some or all portals you have enabled on your login.

Select either Upload to all or the individual options as required. Then '**Close**' the screen. This screen can be ignored and the up-load performed later.

The screenshot shows a modal dialog titled "Upload/remove from portals" with a close button (X) in the top right corner. At the top, there are two buttons: "Remove from all" (with a trash icon) and "Upload to all" (with an upload icon). Below these, there is a list of portals with corresponding "Upload" buttons:

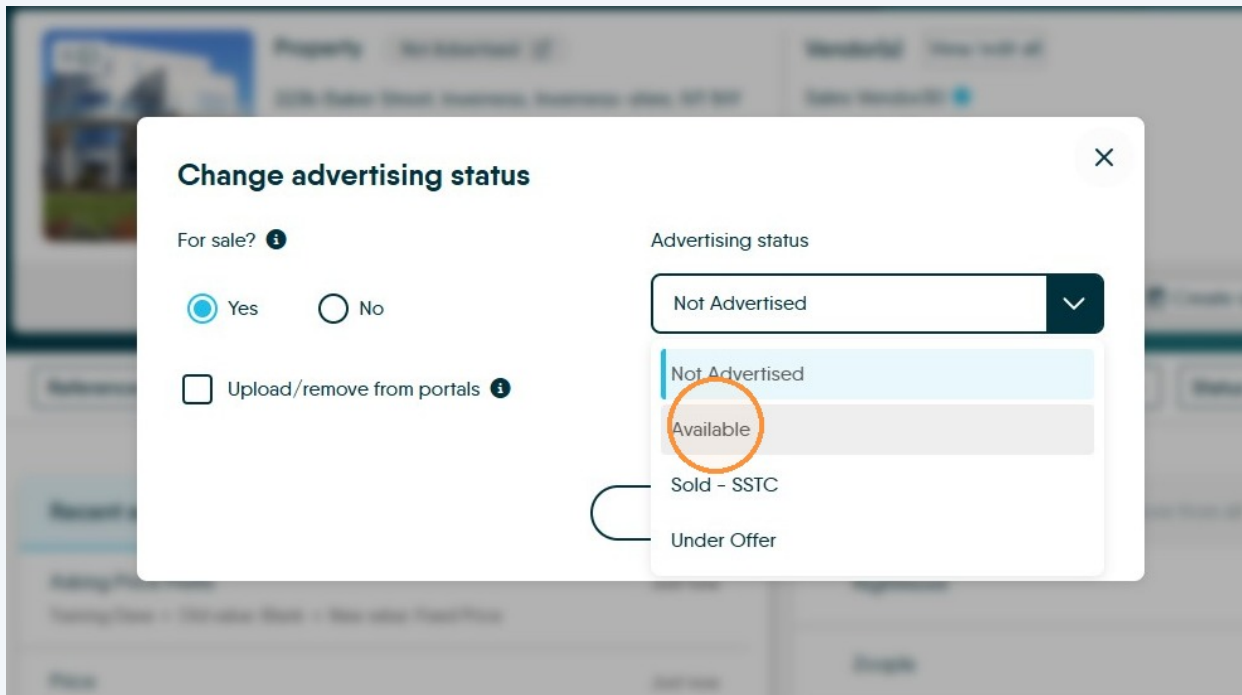
Portal	Action
Rightmove	Upload
Zoopla	Upload
OnTheMarket	Upload

At the bottom of the modal is a large orange "Close" button.

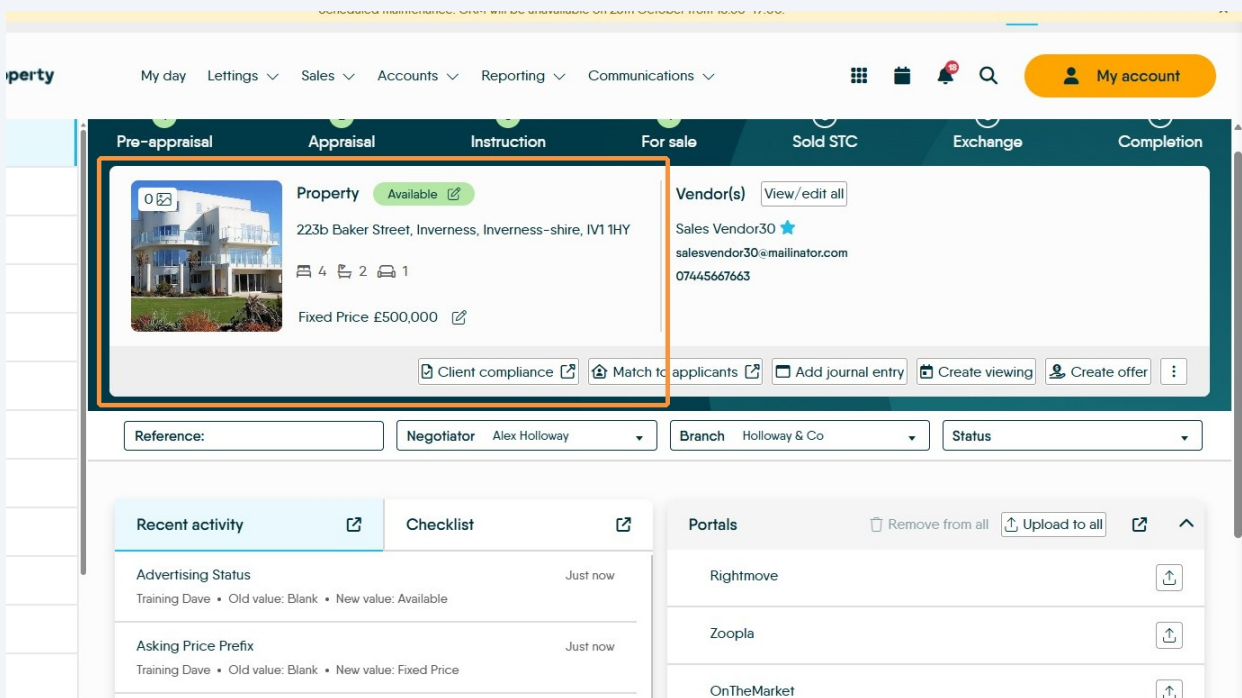
The screenshot shows a modal dialog titled "Change advertising status" with a close button (X) in the top right corner. It contains the following fields and options:

- For sale?** with an information icon (i). It has two radio buttons: "Yes" (selected) and "No".
- Advertising status** with a dropdown menu. The current selection is "Not Advertised". This field is highlighted with an orange border in the image.
- Upload/remove from portals** with an unchecked checkbox and an information icon (i).

At the bottom of the modal are two buttons: "Cancel" and "Save changes" (in orange).



6 The updated information will show on the screen.



7

The 'Vendor(s)' side of the screen will show the details for the first 2 Vendors with an indicator to show there are more than 2 e.g. '+1 more'

To add additional Vendors, click '**View/edit all**'

There are other options available on this screen, there is the option to start the '**Client compliance**' from here there are also the options 'match to applicants', 'add journal entries', 'create viewings' and 'offers'.

Scheduled maintenance: CRM will be unavailable on 28th October from 18:30-19:00.

My day Lettings Sales Accounts Reporting Communications My account



Property Not Available

223b Baker Street, Inverness, Inverness-shire, IV1 1HY

4 2 1

Fixed Price £500,000

Vendor(s) View/edit all

Sales Vendor30 ★
salesvendor30@mailinator.com
07445667663

Mr Vendor Vendor10
zagg.dave@gmail.com

+ 1 more

Client compliance Match to applicants Add journal entry Create viewing Create offer

Reference: Negotiator Alex Holloway Branch Holloway & Co Status

Recent activity

Property Owner Just now
Training Dave • Old value: Sales vENDOR10: False • New value: Sales vENDOR10: True

Property Owner Just now
Training Dave • Old value: Vendor Vendor10: False • New value: Vendor Vendor10: True

Checklist

Sales progression

Agreed price: £450,000

Buyer(s): Mr Sales Applicant11
Buyer(s) solicitor: Rumpole Solicitors
Vendor(s) solicitor: Lawyers4U

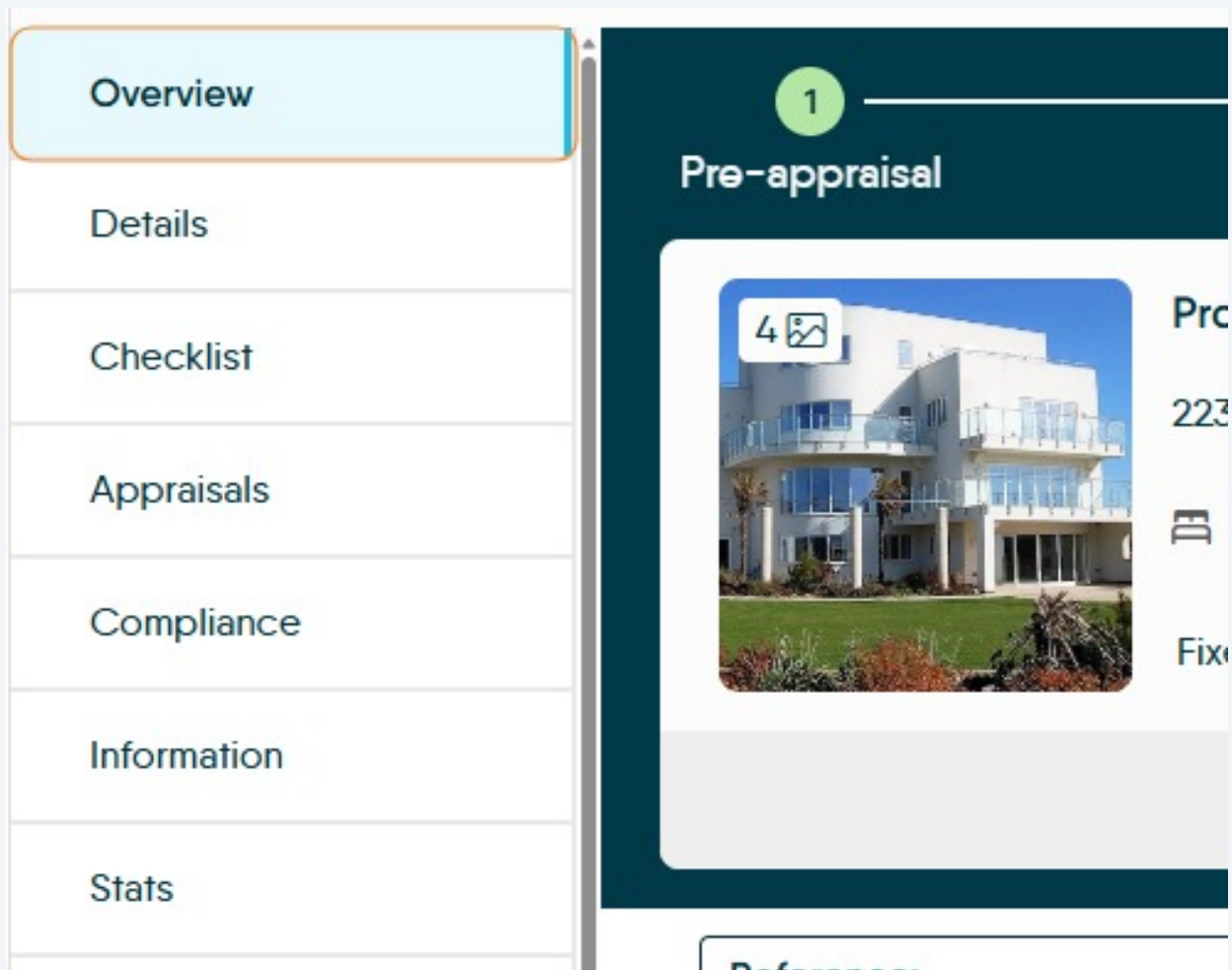
Offer accepted 27/10/2026

Overview Screen

8

This is the first screen you will see when accessing a property record, it can be accessed using the the '**Overview**' menu option in the left menu.

The Overview screen is dynamic, the order of the screen will change as items are updated and increase in priority.



9

On the left side there are 2 options, **Recent activity** and **Checklist**

Recent Activity shows all the changes and updates that have happened to this record in CRM. Showing the change, who made the change and what the change was. (This is the current CRM Audit screen.)

The '**Checklist**' screen will show any Property checklists that you have created and the process through those checklists.

Clicking the down arrow will show you the current Checklists and the completion status, clicking onto the checklist name will open the checklist for review and updating

Recent activity	Checklist
Appraisal - Lost To Agent Alex Holloway • Old value: Blank • New value: Removed	20/10/2026
Appraisal - Status Alex Holloway • Old value: Blank • New value: Won	20/10/2026
Appraisal - Fee Amount Alex Holloway • Old value: 0.00 • New value: 2.00	20/10/2026
Appraisal - Suggested Alex Holloway • Old value: 0.00 • New value: 360000.00	20/10/2026
Appraisal - Vendor Alex Holloway • Old value: 0.00 • New value: 370000.00	20/10/2026
Appraisal - Price To Alex Holloway • Old value: 0.00 • New value: 375000.00	20/10/2026
Appraisal - Price From Alex Holloway • Old value: 0.00 • New value: 300000.00	20/10/2026
Property Owner Alex Holloway • Old value: Sales Vendor30: False • New value: Sales Vendor30: True	20/10/2026

Appraisal Add appraisal

Compliance

Prepare for listing

Portals Remove from all Upload to all

Viewings + Add viewing

Offers + Add offer

 Fixed Price £500,000 + 1 more

Client compliance Match to applicants Add journal entry

Reference: Negotiator Alex Holloway ▼ Branch Holloway & Co

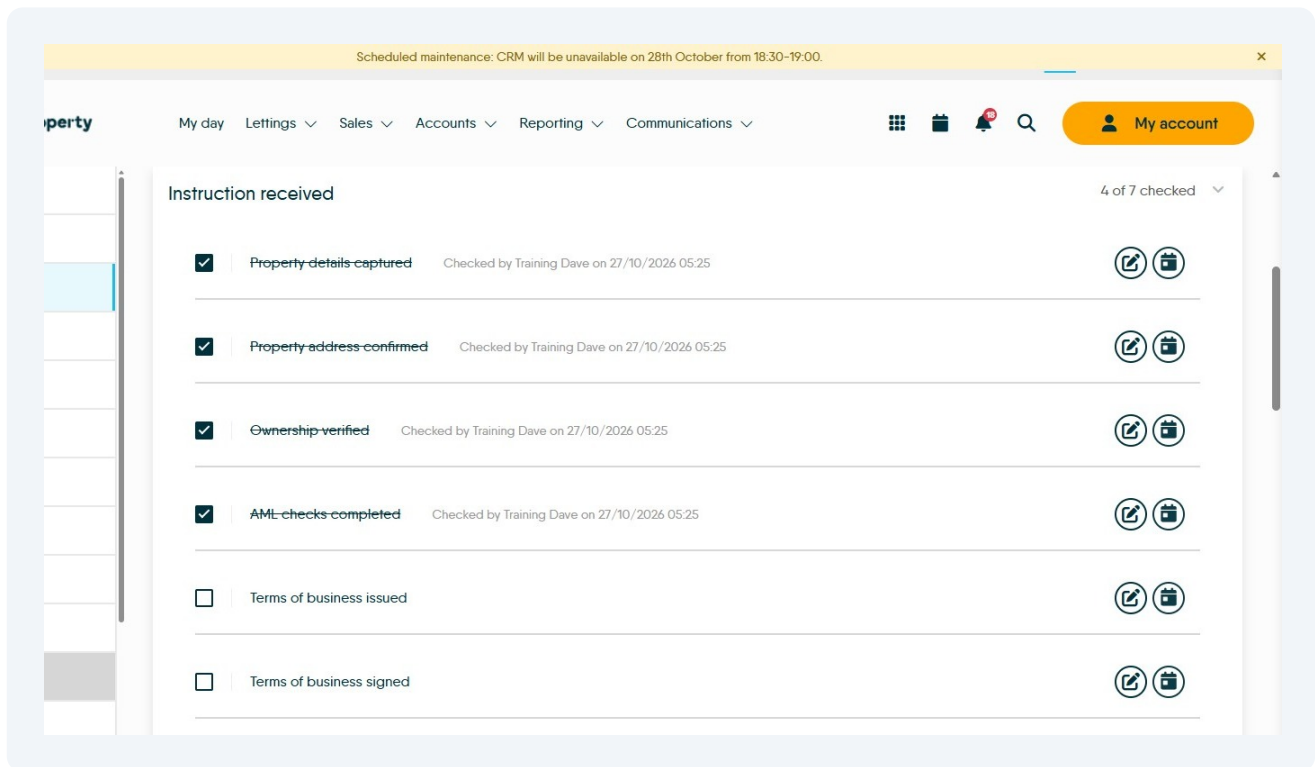
Recent activity	Checklist
Instruction Received	<div><div></div></div> 57%
Property Preparation	<div><div></div></div> 0%
Marketing Launch	<div><div></div></div> 0%
Viewings	<div><div></div></div> 0%

Sales progression

Agreed price: **£450,000**

Buyer(s):
Buyer(s) solicitor:
Vendor(s) solicitor:

- Offer accepted
- Solicitor instructed
- Searches ordered



10

To the right side of the overview screen are a set of steps

These steps are dynamic and will move up/down the list as they become a priority, new options may appear e.g. Progression as you move through the sale process. Some items may disappear e.g. once an offer is accepted all other offers will no longer show in the offers section.

11

Appraisal, this will allow you to add an appraisal if one isn't already set via the 'Add appraisal' option.

The screenshot shows the 'Appraisal' stage of a process. At the top, a progress bar indicates stages: 1 Pre-appraisal, 2 Appraisal (current), 3 Instruction, 4 For sale, 5 Sold STC, 6 Exchange, and 7 Completion. The main header area contains property details: 'Property' (Not Available), address '223b Baker Street, Inverness, Inverness-shire, IV1 1HY', and 'Vendor(s)' (Sales Vendor30). Below this is a 'Checklist' section with items like 'Instruction Received' (57%), 'Property Preparation' (0%), 'Marketing Launch' (0%), and 'Viewings' (0%). On the right, there's an 'Appraisal' section with a circled 'Add appraisal' button and a dropdown arrow. Other buttons include 'Add media', 'Client compliance', 'Match to applicants', 'Add journal entry', 'Create viewing', and 'Create offer'.

12

Click the down arrow and the Appraisal status (won or lost) will show with the valuers name. Once an appraisal has been won you can add the instruction date using the button. The instruction notification in the milestones will turn green and will show the date.

This screenshot shows the same interface as the previous one, but with an appraisal added. The 'Appraisal' section now displays 'Tue 20 Oct 2026 at 12:45' with a green status indicator and 'Alex Holloway • Won'. A circled 'Add instruction date' button is visible next to the appraisal details. The 'Checklist' and other interface elements remain the same.

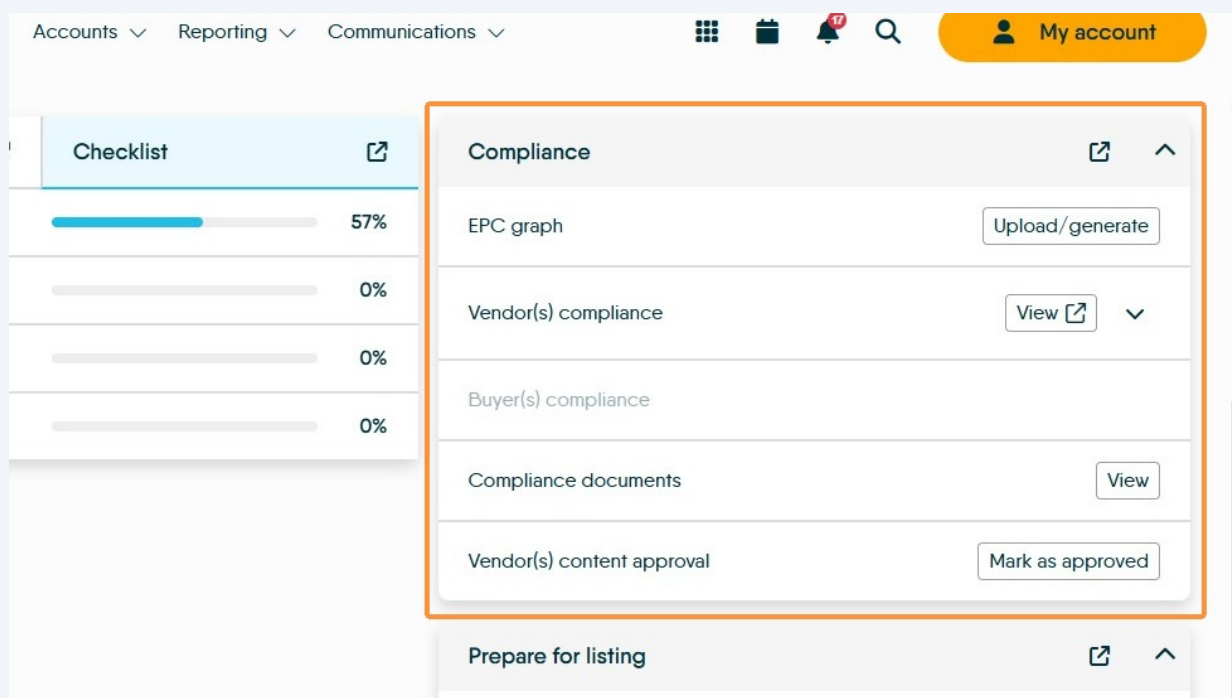
13

The next step is **Compliance**.

Expanding the Compliance section allows the EPC graph to be generated easily. Click '**Upload/generate**' to access the screen to add the EPC.

Vendors Compliance allows review of the access to the movebutler section of iamproperty CRM to start the customers AML checking n.b. the CRM might not allow the property record to be updated until this is started.

If our Vendor has confirmed the property details are as they would like, **Mark vendor content approval** as approved.



Accounts ▾ Reporting ▾ Communications ▾

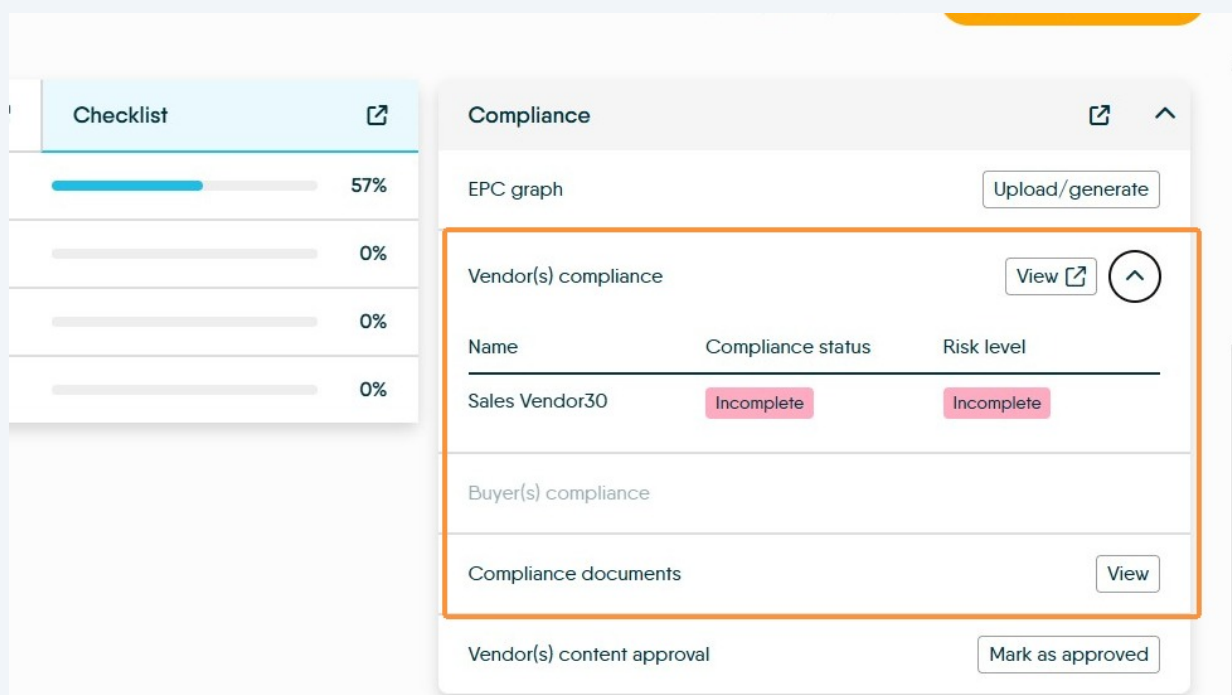
My account

Checklist 57%

Compliance

- EPC graph [Upload/generate](#)
- Vendor(s) compliance [View](#) ▾
- Buyer(s) compliance
- Compliance documents [View](#)
- Vendor(s) content approval [Mark as approved](#)

Prepare for listing

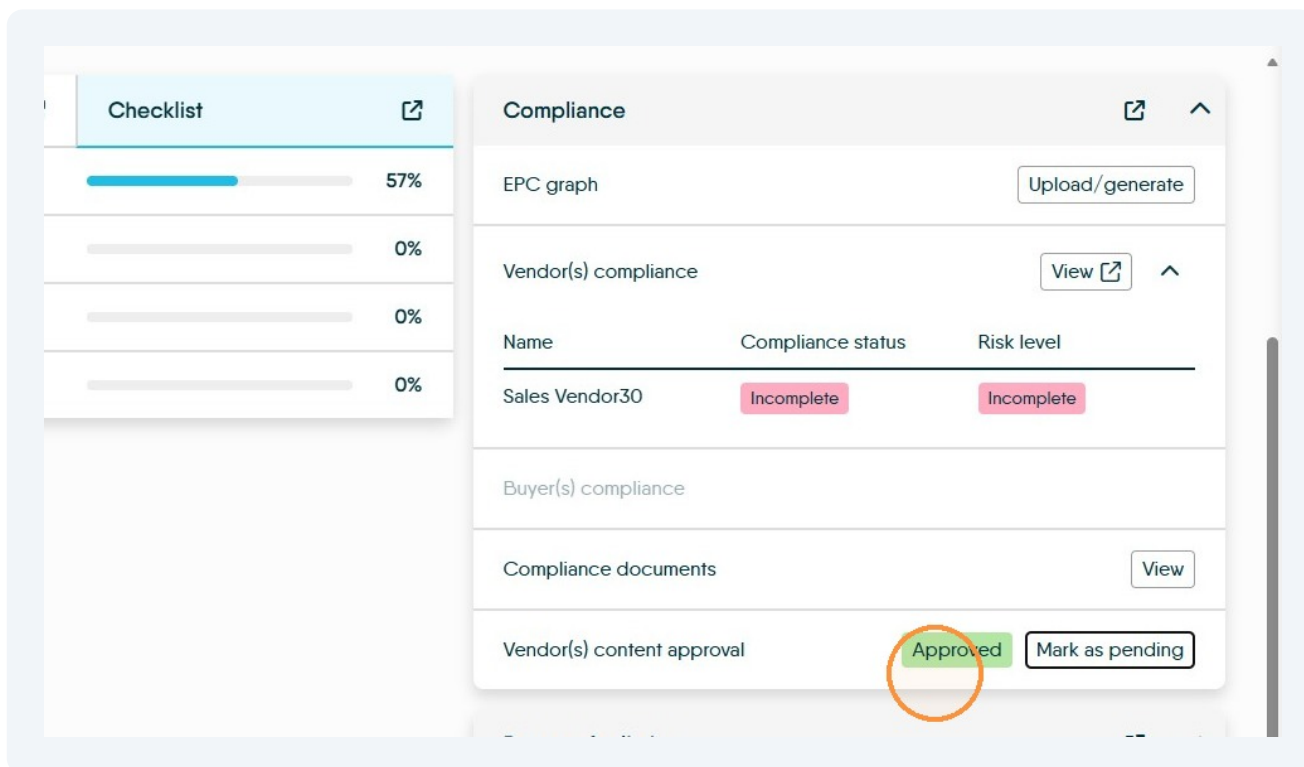


Checklist 57%

Compliance

- EPC graph [Upload/generate](#)
- Vendor(s) compliance [View](#) [^](#)

Name	Compliance status	Risk level
Sales Vendor30	Incomplete	Incomplete
- Buyer(s) compliance
- Compliance documents [View](#)
- Vendor(s) content approval [Mark as approved](#)



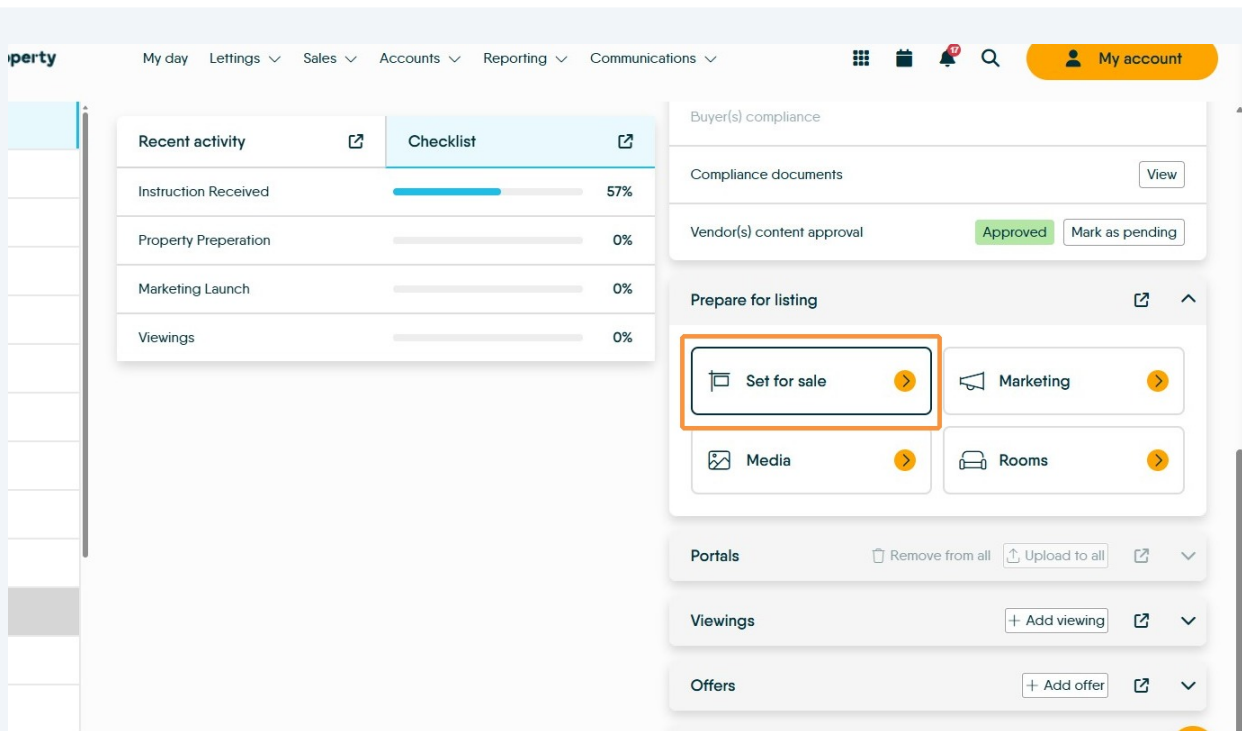
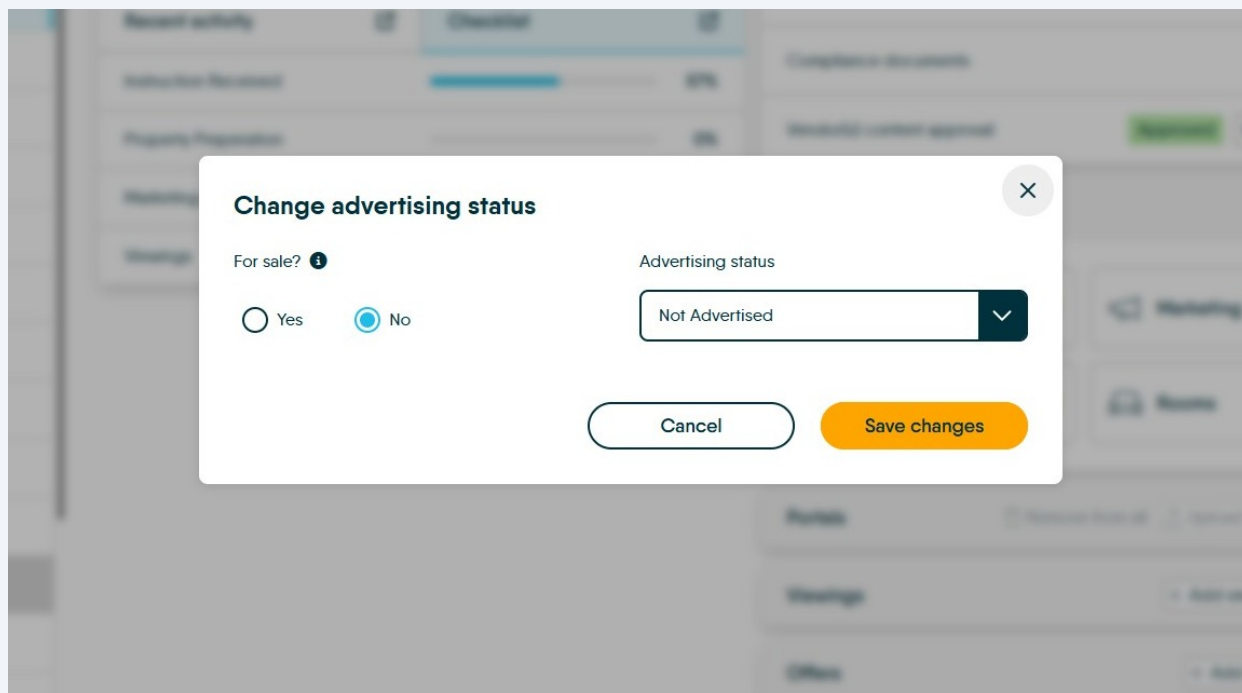
14

The **Prepare for listing** step has 4 sections and allows all of the key data to be added to be able to make a property live on the portals. The 4 sections are; Set for sale, Marketing, Media and Rooms.

15

Set for sale. This option acts the same way as the option you get in the main screen. You can set the Advertising status for the property, Mark it 'For Sale' and if you have enabled for sale, enable the upload to Portals.

This might be one of the last options you would update, after all the property details and images are added and the details accepted by the Vendor.



16 Marketing. This takes you to the marketing screen in the property record, allowing you to add and update all the details you would need for a property record.

The **Marketing** screen also gives you the opportunity to set the property for sale and make it available to upload to portals.

Once the property is marked as For sale the appropriate icon on the milestone (at the top of the screen) will illuminate green.

Checklist

57%

0%

0%

0%

Compliance documents

View

Vendor(s) content approval

Approved

Mark as pending

Prepare for listing

Set for sale

Marketing

Media

Rooms

Portals

Remove from all

Upload to all

Viewings

Add viewing

Prices and Matching

Currency GBP

Prefix

Select prefix

Price (GBP)

0

Bedrooms

4

Bathrooms

2

Receptions

1

Property Advertising

For sale

Yes No

New build

Yes No

Board Status

No Board

Advertising Address

Advertising Status

Not Advertised

Advertising Uri

Virtual Tour Uri 1

Virtual Tour Uri 2

Premium Listing

Please select a premium listing

Coming to market

Date coming to market

Auction

17 **Media** section to add any property images that you will want to add.

The screenshot displays a real estate management dashboard. On the left, there are three progress bars, each at 0%. The main section is titled 'Prepare for listing' and contains several action buttons: 'Set for sale', 'Marketing', 'Media' (circled in orange), and 'Rooms'. Below these are sections for 'Portals', 'Viewings', and 'Offers', each with a '+ Add' button. The 'Add Media' section on the left includes a search bar, a 'Sort Media Default' dropdown, and a 'Media type' list with options: Image, Floorplan, EPC, and 360. The main content area shows a message 'No pictures available' with a 'Start' button circled in orange.

- 18** Open the **Rooms** section.
Click Add Room, this will allow you to add individual rooms detail - sizes and descriptions and if required, images.

Recent activity

Instruction Received

57%

Property Preparation

0%

Marketing Launch

0%

Viewings

0%

Buyer(s) compliance

Compliance documents

View

Vendor(s) content approval

Approved

Mark as pending

Prepare for listing

Set for sale

Marketing

Media

Rooms

Portals

Remove from all

Upload to all

Viewings

+ Add viewing

Offers

+ Add offer

Appraisal

Add appraisal

Client compliance

Match to applicants

Add journal entry

Create viewing

Create offer

Reference:

Negotiator Alex Holloway

Branch Holloway & Co

Status

+ Add Room

Sort Rooms

Search

Clear filters

No rooms available

Please click the button to add

Add Room

17

19

The **Portals** option will be available once the property is marked as available for sale.

The screenshot shows the CRM interface with a top navigation bar containing links: Client compliance, Match to applicants, Add journal entry, Create viewing, and Create offer. Below this is a filter bar with dropdowns for Negotiator (Alex Holloway), Branch (Holloway & Co), and Status. The main content area is divided into two sections: Checklist on the left and Portals on the right. The Portals section is highlighted with an orange box and contains a list of portals: Rightmove, Zoopla, and OnTheMarket, each with an upload icon. Below the Portals section is a Viewings section with an 'Add viewing' button and a calendar icon.

20

Viewings Any Viewings added to CRM either by the best practice route linked below or from this screen will show here for easy quick visibility. [Core Process Simplification - Adding a New Lettings Viewing Appointment – iamproperty](#)

Once a viewing is added it is tracked in this screen, the screen will show how many upcoming appointments there are and how many require feedback, there is also an add feedback option next to the appropriate viewings.

The screenshot shows the CRM interface with a top navigation bar containing links: Client compliance, Match to applicants, Add journal entry, Create viewing, and Create offer. Below this is a filter bar with dropdowns for Negotiator (Alex Holloway), Branch (Holloway & Co), and Status. The main content area is divided into two sections: Checklist on the left and Viewings on the right. The Viewings section is highlighted with an orange box and contains a list of viewings: OnTheMarket, with an upload icon. Below the Viewings section is a Viewings section with an 'Add viewing' button and a calendar icon. Below the Viewings section is an Offers section with an 'Add offer' button and a dollar sign icon.

Checklist

Just now

value: 223b Baker Street, Inverness

1 minute ago

value: No Board

1 minute ago

value: Yes

1 minute ago

value: USN_foot

1 minute ago

value: No

6 minutes ago

value: Yes

10 minutes ago

Zoopla

OnTheMarket

Viewings

+ Add viewing

Upcoming (0)

Requiring feedback (1)

All (1)

✓

Tue 27 Oct 2026 at 17:36

Sales Applicant11

Add feedback

Offers

+ Add offer

\$

No offers

Offers can be added here and also tracked from this menu.

Once an offer is added it will show on the screen alongside any other offer that is not marked as Accepted. Once an offer is marked as Accepted, the only visible offer will be the accepted one and a progression screen will show.

Once the offer is accepted it will show and a progression screen will show in the list.

ue: Yes	1 minute ago
value: USN_feet	1 minute ago
ue: No	1 minute ago
ue: Yes	6 minutes ago
value: 27/10/2026 00:00	10 minutes ago
checked	12 minutes ago
ue: Yes	12 minutes ago
checked	12 minutes ago

value: notes added	Just now
value: 27/10/2026 17:38	Just now
value: Pending	Just now
value: 300000.00	Just now
value: Training Dave	Just now
value: Sales Applicant11 - j.dave5@gmail.com	Just now
value: 223b Baker Street, Inverness,	Just now

Upcoming (0)
Requiring feedback (1)
All (1)

✓ Tue 27 Oct 2026 at 17:36
Sales Applicant11
Add feedback

Offers
+ Add offer

No offers
+ Add offer

Appraisal
Add appraisal

Compliance

Viewings
+ Add viewing

Upcoming (0)
Requiring feedback (1)
All (1)

✓ Tue 27 Oct 2026 at 17:36
Sales Applicant11
Add feedback

Offers
+ Add offer

Pending (1)
Accepted (0)
All (1)

Mr Sales Applicant11
£300,000 • Offer added: Tue 27 Oct 2026 • Pending
View

Appraisal
Add appraisal

Compliance

Prepare for listing

Checklist

Just now

ew value: Accepted

Just now

inf11 • New value: Sales Applicant11 – zagg.dave5@gmail.com

Just now

value: 223b Baker Street, , Inverness, nness-shire, IV1 1HY

Just now

• New value: 450000.00

Just now

inf11 • New value: Sales Applicant11 – zagg.dave5@gmail.com

Offers

+ Add offer

Pending (0)

Accepted (1)

All (1)

Mr Sales Applicant11

£450,000 • Offer added: Tue 27 Oct 2026 • Accepted

View

Sales progression

Agreed price: £450,000

Buyer(s):

Buyer(s) solicitor:

Vendor(s) solicitor:

Mr Sales Applicant11

Not set

Not set

Offer accepted

Solicitor instructed

Searches ordered

27/10/2026

22

The **Sales progression** section follows the entries in the the progression and chain. As items are added or marked as completed the appropriate icon turns green.

The Buyers and Sellers Solicitor details are added in the 'chain' menu of the property progression.

As the Sale moves through progression the icons will turn green.

Checklist

1 minute ago

ew value: Accepted

1 minute ago

inf11 • New value: Sales Applicant11 – zagg.dave5@gmail.com

1 minute ago

value: 223b Baker Street, , Inverness, nness-shire, IV1 1HY

1 minute ago

• New value: 450000.00

1 minute ago

inf11 • New value: Sales Applicant11 – zagg.dave5@gmail.com

£450,000 • Offer added: Tue 27 Oct 2026 • Accepted

Sales progression

Agreed price: £450,000

Buyer(s):

Buyer(s) solicitor:

Vendor(s) solicitor:

Mr Sales Applicant11

Not set

Not set

Offer accepted

Solicitor instructed

Searches ordered

Mortgage offer

Searches back

Exchange

Completion

27/10/2026

27/10/2026

21

2 minutes ago

ew value: Accepted

2 minutes ago

intf11 • New value: Sales Applicant11 –
zagg.dave5@gmail.com

2 minutes ago

value: 223b Baker Street, , Inverness,
ness-shire, IV1 1HY

2 minutes ago

• New value: 450000.00

2 minutes ago

intf11 • New value: Sales Applicant11 –
zagg.dave5@gmail.com

2 minutes ago

value: 223b Baker Street, , Inverness,
ness-shire, IV1 1HY

£450,000 • Offer added: Tue 27 Oct 2026 • Accepted

Sales progression

Agreed price: **£450,000**

Buyer(s):	Mr Sales Applicant11
Buyer(s) solicitor:	Rumpole Solicitors
Vendor(s) solicitor:	Lawyers4U

- ☒ Offer accepted 27/10/2026
- ☒ Solicitor instructed 27/10/2026
- ☐ Searches ordered
- ☐ Mortgage offer
- ☐ Searches back
- ☐ Exchange
- ☐ Completion

Accounts ▾ Reporting ▾ Communications ▾



My account

Checklist

7 minutes ago

ew value: Accepted

7 minutes ago

intf11 • New value: Sales Applicant11 –
zagg.dave5@gmail.com

7 minutes ago

value: 223b Baker Street, , Inverness,
ness-shire, IV1 1HY

7 minutes ago

• New value: 450000.00

Agreed price: **£450,000**

Buyer(s):	Mr Sales Applicant11
Buyer(s) solicitor:	Rumpole Solicitors
Vendor(s) solicitor:	Lawyers4U

- ☒ Offer accepted 27/10/2026
- ☒ Solicitor instructed 27/10/2026
- ☒ Searches ordered 28/10/2026
- ☒ Mortgage offer 28/10/2026
- ☒ Searches back 06/11/2026
- ☒ Exchange 18/11/2026
- ☒ Completion 19/11/2026

Portals

Remove from all

Upload to all

