

Using the Sales Progression Actions



This guide how to use the Sales Progression Actions feature, specifically for managing the 'Contracts Exchanged' and 'Completion' stages of property sales.

It provides step-by-step instructions for triggering and customising automation actions, ensuring that users can efficiently track their sales processes.

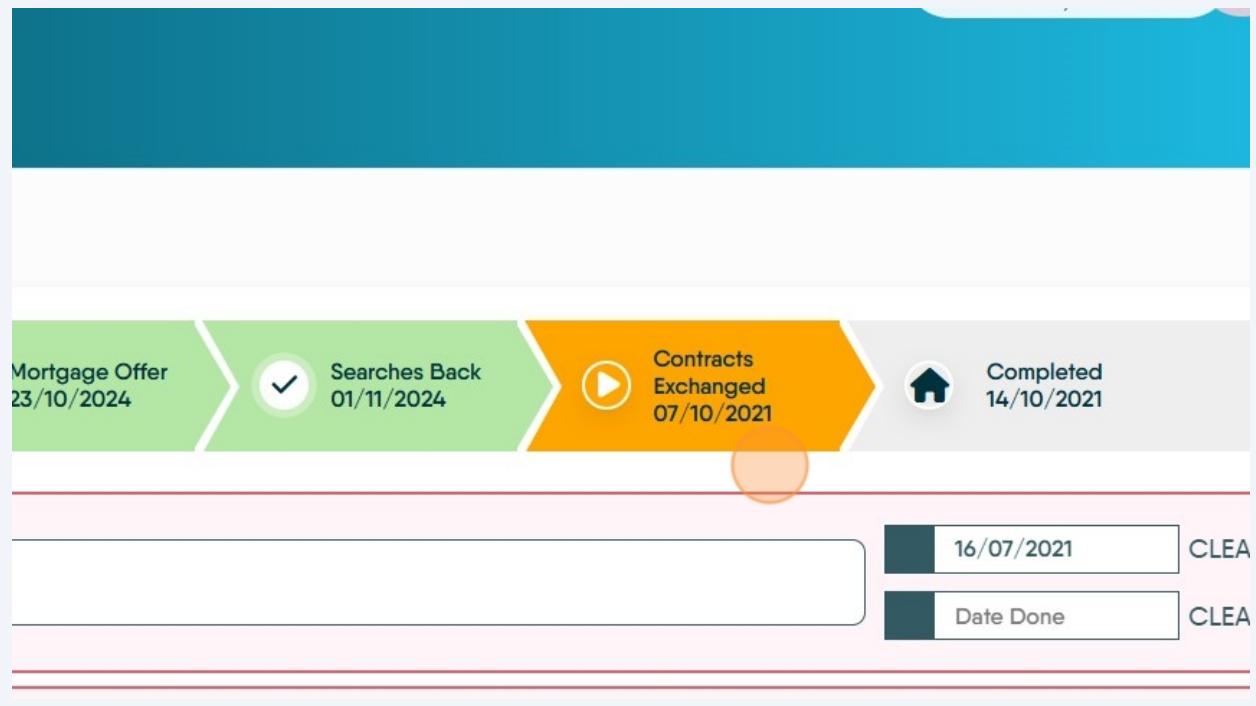
By following this guide, users can enhance their workflow, minimise manual updates, and ensure compliance with their configuration settings.

- 1 The automations are triggered on the Sales Progression 'Conveyancing' tab.

Navigate to the offer you wish to perform the automation on via Sales Progression, or the Property Offer tab.

<https://crm.iamproperty.com/Sales/SalesProgression/>

- 2 Your offer will need to have progressed to the Contracts Exchanged stage in order to trigger the automation.



3

To trigger the Exchange actions, against 'Contracts Exchanged', click the "Date Done" field.
Select your date of exchange in the pop-up calendar
Click 'Save'.

This will trigger the 'Contracts Exchanged' window, if it is enabled in configuration.

Mortgage Offer
No Estimate

Searches Back
Searches Ordered +21 days

Enquiries Raised
No Estimate

Seller Signed
No Estimate

Buyer Signed
No Estimate

Contracts Exchanged
Completion -2 weeks

Completion Offer Accepted +3 months

Date Estimate CLEAR
23/10/2024 CLEAR

Date Estimate CLEAR
01/01/2025 CLEAR
01/11/2024 CLEAR

Date Estimate CLEAR
Date Done CLEAR

Date Estimate CLEAR
← December 2024 →
Sun Mon Tue Wed Thu Fri Sat
24 25 26 27 28 29 30
1 2 3 4 5 6 7
8 9 10 11 12 13 14
15 16 17 18 19 20 21
22 23 24 25 26 27 28
29 30 31 1 2 3 4

Date Done CLEAR

Date Estimate CLEAR
← December 2024 →
Sun Mon Tue Wed Thu Fri Sat
24 25 26 27 28 29 30
1 2 3 4 5 6 7
8 9 10 11 12 13 14
15 16 17 18 19 20 21
22 23 24 25 26 27 28
29 30 31 1 2 3 4

Date Done CLEAR

The screenshot shows a software interface with several date input fields and a save button. At the top, there are two fields: 'Date Estimate' (containing 'CLEAR') and 'Date Done' (containing 'CLEAR'). Below these are two green-highlighted fields: '07/10/2021' (containing 'CLEAR') and '06/12/2024' (containing 'CLEAR'). Further down, there are two yellow-highlighted fields: '14/10/2021' (containing 'CLEAR') and 'Date Done' (containing 'CLEAR'). At the bottom right is a 'Save' button with a circular icon.

4 In the Contracts Exchanged window, the actions will be ticked in accordance with your configuration.

You can tick or untick any actions that you would or would not like to complete.

Note: If any of the 'update status' options are greyed out, you will need to set which status to update to, via configuration.

Click "Confirm" to complete the actions.

The screenshot shows the 'Contracts exchanged' window with the title 'Contracts exchanged'. Below the title, it says 'Select the actions you'd like to occur:'. There are two buttons at the top left: 'Select all' and 'Deselect all'. Below these are three action options, each with a checkbox and a label. The first two options have blue checkmarks, while the third has an orange outline. At the bottom are two buttons: 'Skip' and 'Confirm'.

Action	Status
Un-check advertise on marketing tab	<input checked="" type="checkbox"/>
Remove property from portals	<input checked="" type="checkbox"/>
Update board status	<input type="checkbox"/>

Actions in progress

Please don't navigate away from this page.

- 5 Click "Dismiss" to close the confirmation.

Actions complete

Completed: Success

Status Actions: Success

Portal Actions: Success

Dismiss

- 6 To trigger the Completion actions, against "Completion", click the "Date Done" field.
Select your date of completion in the pop-up calendar

Mortgage Offer No Estimate	<input type="text"/>	Date Estimate <input type="button" value="CLEAR"/>
Searches Back Searches Ordered +21 days	<input type="text"/>	Date <input type="button" value="01/01/2025"/> CLEAR Date <input type="button" value="01/11/2024"/> CLEAR
Enquiries Raised No Estimate	<input type="text"/>	Date Estimate <input type="button" value="CLEAR"/> Date Done <input type="button" value="CLEAR"/>
Seller Signed No Estimate	<input type="text"/>	Date Estimate <input type="button" value="CLEAR"/> Date Done <input type="button" value="CLEAR"/>
Buyer Signed No Estimate	<input type="text"/>	Date Estimate <input type="button" value="CLEAR"/> Date Done <input type="button" value="CLEAR"/>
Contracts Exchanged Completion -1week	<input type="text"/>	Date <input type="button" value="07/10/2021"/> CLEAR Date <input type="button" value="06/12/2024"/> CLEAR
Completion Offer Accepted +3 months	<input type="text"/>	Date <input type="button" value="14/10/2021"/> CLEAR Date Done <input type="button" value="CLEAR"/>



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<input type="text"/>	← December 2024 →																																																	
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29	30	31	1	2	3	4																																												
<input type="text"/>	Date Done <input type="button" value="CLEAR"/>																																																	

7

Click "Save".

This will trigger the 'Completion' window, if it is enabled in configuration.

The image shows a 'Completion' window with three rows of date fields. Each row contains a text input field, a date picker icon, a date value, and a 'CLEAR' button. The first row has a red background and contains 'Date Estimate' and 'Date Done'. The second and third rows have a green background and contain '07/10/2021' and '06/12/2024' respectively. The fourth row is a dark grey footer bar with a 'Save' button and a circular icon containing a save symbol.

Date Estimate	CLEAR
Date Done	CLEAR
07/10/2021	CLEAR
06/12/2024	CLEAR
14/10/2021	CLEAR
06/12/2024	CLEAR

Save

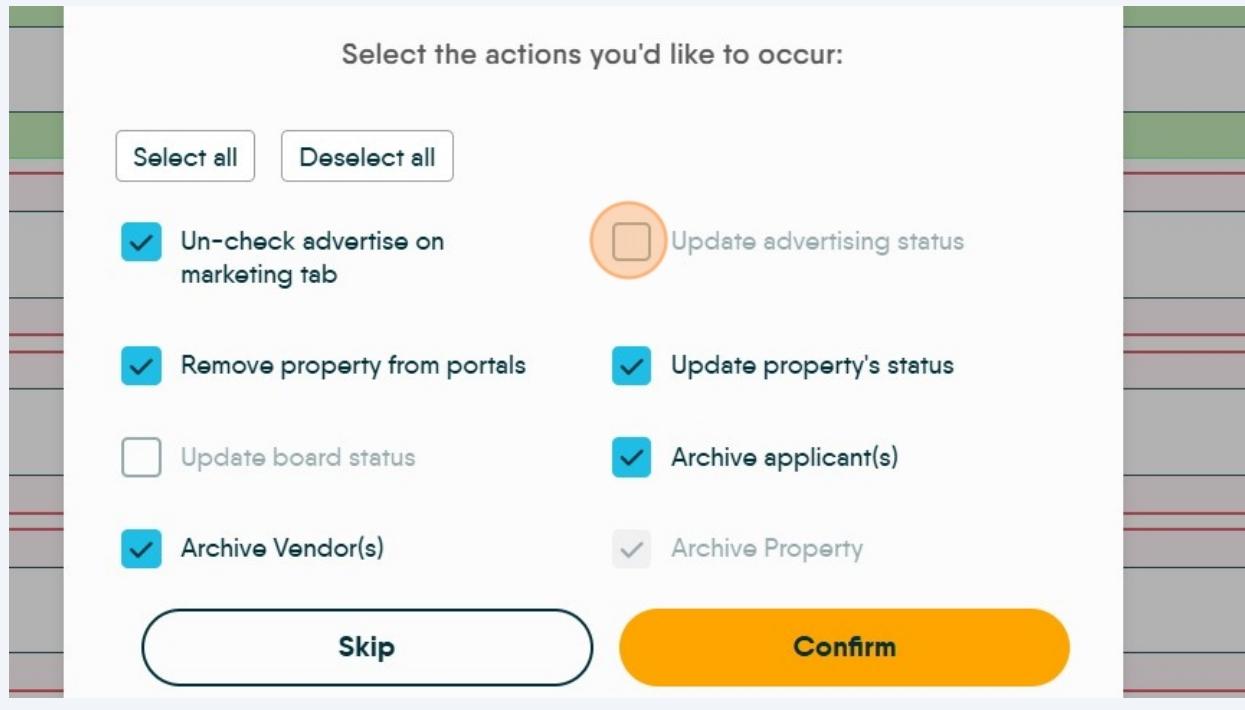
8

In the Completion window, the actions will be ticked in accordance with your configuration.

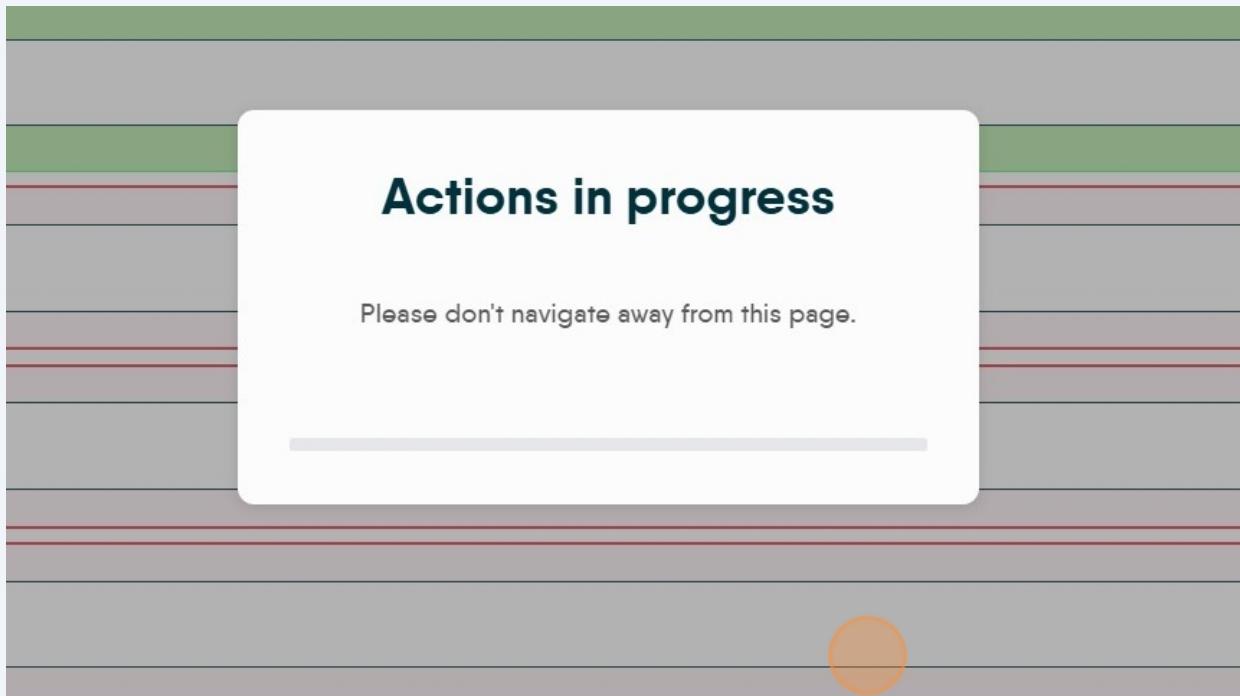
You can tick or untick any actions that you would or would not like to complete.

If you opt to archive the vendor, the property must also be archived.

Note: If any of the 'update status' options are greyed out, you will need to set which status to update to, via configuration.



9 Click "Confirm" to complete the actions.



10 Click "Dismiss" to close the confirmation.

