

# 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.

The screenshot shows a vertical list of form fields with date selection options:

- Mortgage Offer** (No Estimate): Date Estimate: 23/10/2024
- Searches Back** (Searches Ordered +21 days): Date Estimate: 01/01/2025, Date Done: 01/11/2024
- Enquiries Raised** (No Estimate): Date Estimate, Date Done
- Seller Signed** (No Estimate): Date Estimate, Date Done (Calendar pop-up for December 2024)
- Buyer Signed** (No Estimate): Date Estimate, Date Done
- Contracts Exchanged** (Completion -1week): Date Done (Calendar pop-up for December 2024, 6th selected)
- Completion** (Offer Accepted +3 months): Date Done: 14/10/2021

This is a close-up of the 'Contracts Exchanged' field. It shows a text input field, a 'Date Done' button, and a 'CLEAR' button. A calendar pop-up is open, displaying December 2024. The date '6' is circled in orange, indicating it has been selected.

Form with three sections:

- Pink Section:**
  - Text input field
  - Date Estimate: CLEAR
  - Date Done: CLEAR
- Green Section:**
  - Text input field
  - 07/10/2021: CLEAR
  - 06/12/2024: CLEAR
- Yellow Section:**
  - Text input field
  - 14/10/2021: CLEAR
  - Date Done: CLEAR

Save button with lock 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.

## Contracts exchanged

Select the actions you'd like to occur:

Select all
Deselect all

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

Skip
Confirm

## 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

<b>Mortgage Offer</b> No Estimate	<input type="text"/>	📅 Date Estimate	CLEAR
		📅 23/10/2024	CLEAR
<b>Searches Back</b> Searches Ordered +21 days	<input type="text"/>	📅 01/01/2025	CLEAR
		📅 01/11/2024	CLEAR
<b>Enquiries Raised</b> No Estimate	<input type="text"/>	📅 Date Estimate	CLEAR
		📅 Date Done	CLEAR
<b>Seller Signed</b> No Estimate	<input type="text"/>	📅 Date Estimate	CLEAR
		📅 Date Done	CLEAR
<b>Buyer Signed</b> No Estimate	<input type="text"/>	📅 Date Estimate	CLEAR
		📅 Date Done	CLEAR
<b>Contracts Exchanged</b> Completion -2week	<input type="text"/>	📅 07/10/2021	CLEAR
		📅 06/12/2024	CLEAR
<b>Completion</b> Offer Accepted +3 months	<input type="text"/>	📅 14/10/2021	CLEAR
		📅 Date Done	CLEAR



<input type="text"/>	📅 Date Done	CLEAR																																																	
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<input type="text"/>	📅	<div style="border: 1px solid #ccc; padding: 5px;"> <p>← December 2024 →</p> <table border="1"> <thead> <tr> <th>Sun</th> <th>Mon</th> <th>Tue</th> <th>Wed</th> <th>Thu</th> <th>Fri</th> <th>Sat</th> </tr> </thead> <tbody> <tr> <td>24</td> <td>25</td> <td>26</td> <td>27</td> <td>28</td> <td>29</td> <td>30</td> </tr> <tr> <td>1</td> <td>2</td> <td>3</td> <td>4</td> <td>5</td> <td>6</td> <td>7</td> </tr> <tr> <td>8</td> <td>9</td> <td>10</td> <td>11</td> <td>12</td> <td>13</td> <td>14</td> </tr> <tr> <td>15</td> <td>16</td> <td>17</td> <td>18</td> <td>19</td> <td>20</td> <td>21</td> </tr> <tr> <td>22</td> <td>23</td> <td>24</td> <td>25</td> <td>26</td> <td>27</td> <td>28</td> </tr> <tr> <td>29</td> <td>30</td> <td>31</td> <td>1</td> <td>2</td> <td>3</td> <td>4</td> </tr> </tbody> </table> </div>	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
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<input type="text"/>	📅 Date Done	CLEAR																																																	

7 Click "Save".

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

The screenshot shows a software interface with a light blue background. At the top left, there is a circular icon with the number '7' and the text 'Click "Save".'. Below this, a text box explains that clicking 'Save' will trigger a 'Completion' window if enabled in configuration. The main part of the interface is a form with a light green background. It contains three rows of input fields. The first row is highlighted in pink and contains two input fields: 'Date Estimate' and 'Date Done', each with a 'CLEAR' button. The second and third rows are highlighted in green and each contains two input fields: a date field with a calendar icon and a 'CLEAR' button, and a checkmark field with a 'CLEAR' button. The dates shown are '07/10/2021' and '14/10/2021' for the date fields, and '06/12/2024' for the checkmark fields. At the bottom right of the form, there is a 'Save' button and a circular icon with a lock symbol.

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.

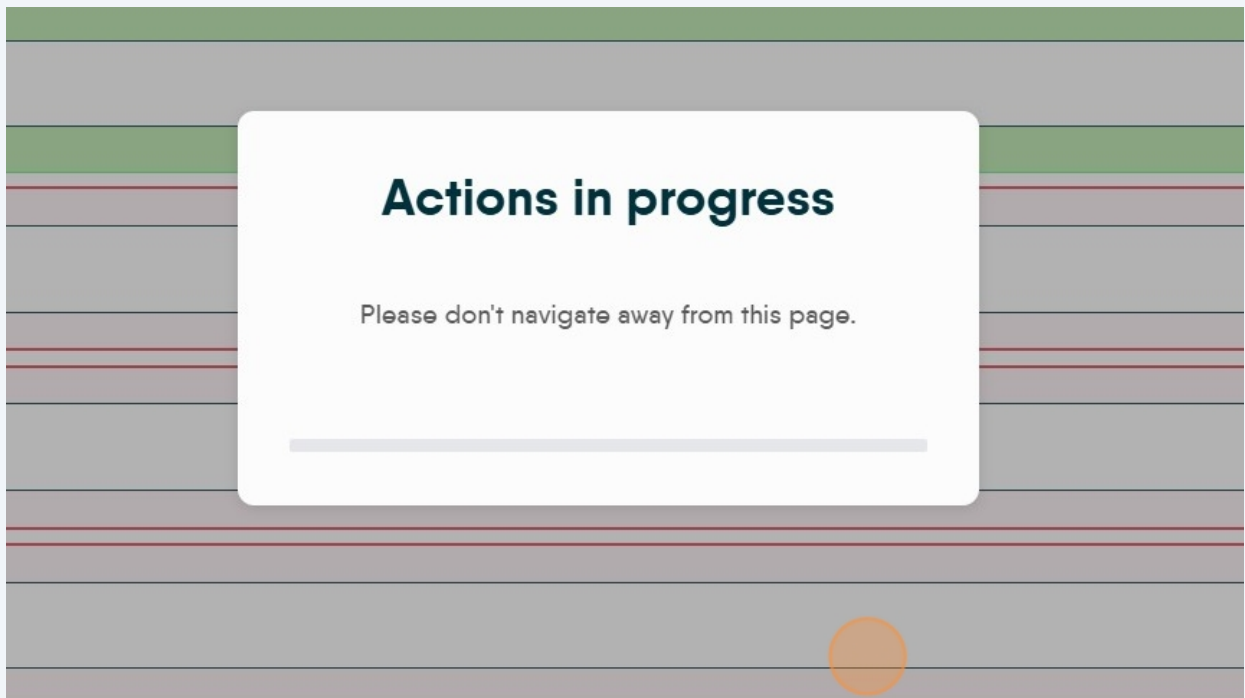
If you opt to archive the vendor, the property must also be archived.

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

Select the actions you'd like to occur:

<input checked="" type="checkbox"/> Un-check advertise on marketing tab	<input type="checkbox"/> Update advertising status
<input checked="" type="checkbox"/> Remove property from portals	<input checked="" type="checkbox"/> Update property's status
<input type="checkbox"/> Update board status	<input checked="" type="checkbox"/> Archive applicant(s)
<input checked="" type="checkbox"/> Archive Vendor(s)	<input type="checkbox"/> Archive Property

9 Click "Confirm" to complete the actions.



10 Click "Dismiss" to close the confirmation.

