# 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.

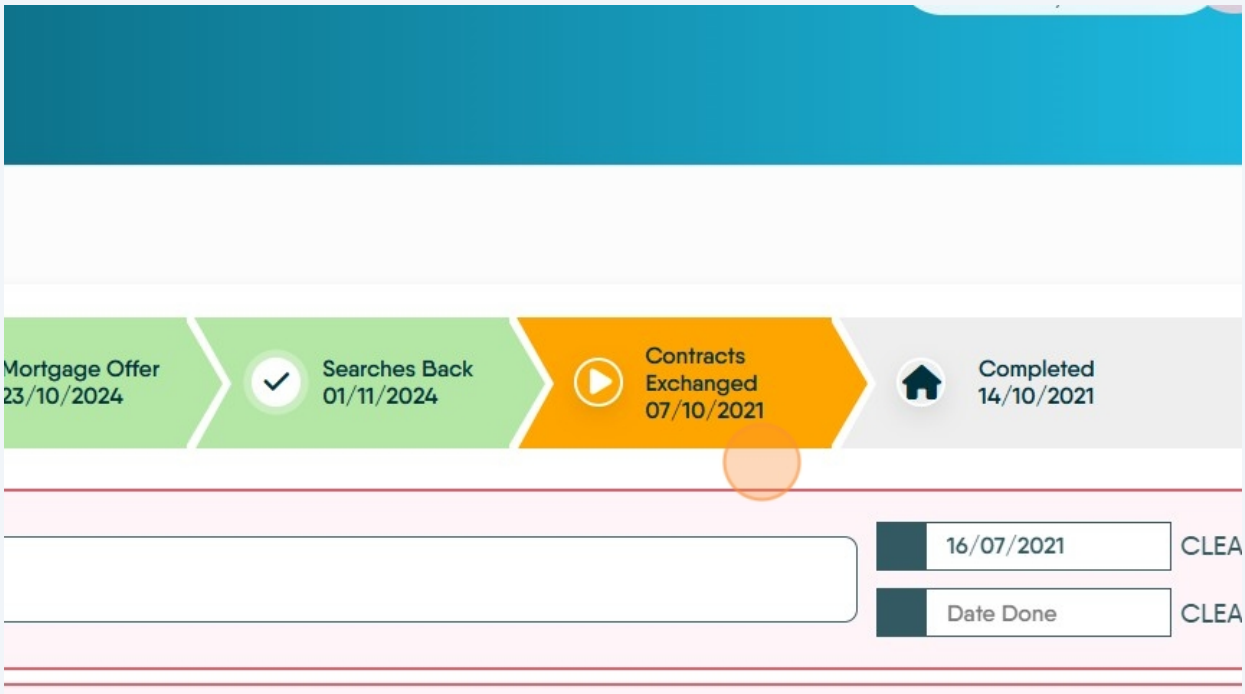
By following this guide, users can enhance their workflow, minimise manual updates, and ensure compliance with their configuration settings.

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

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

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

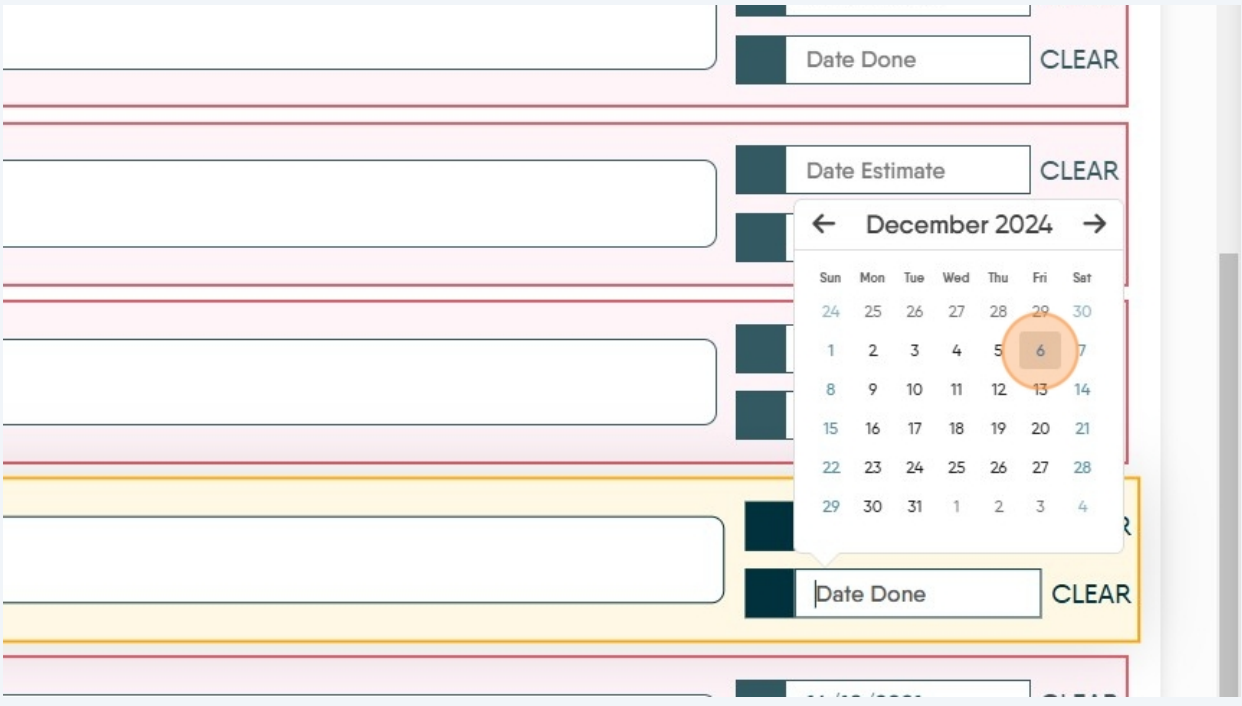
**2** Your offer will need to have progressed to the Contracts Exchanged stage in order to trigger the automation.

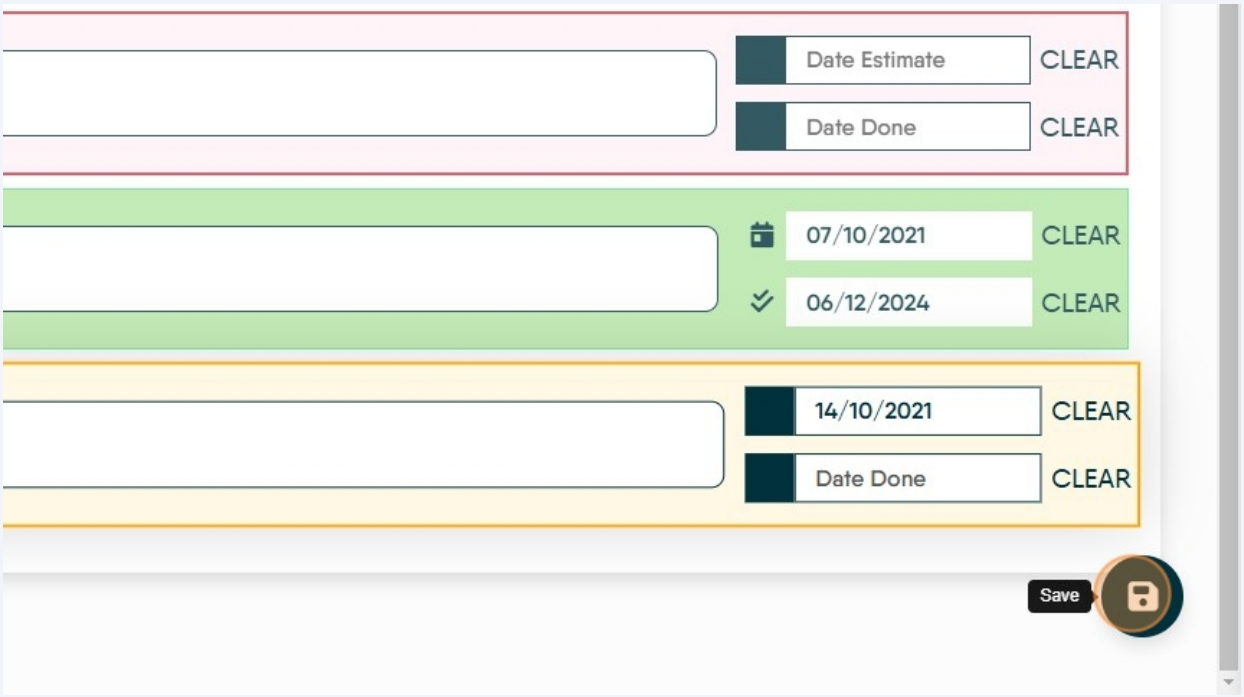


**3**

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.

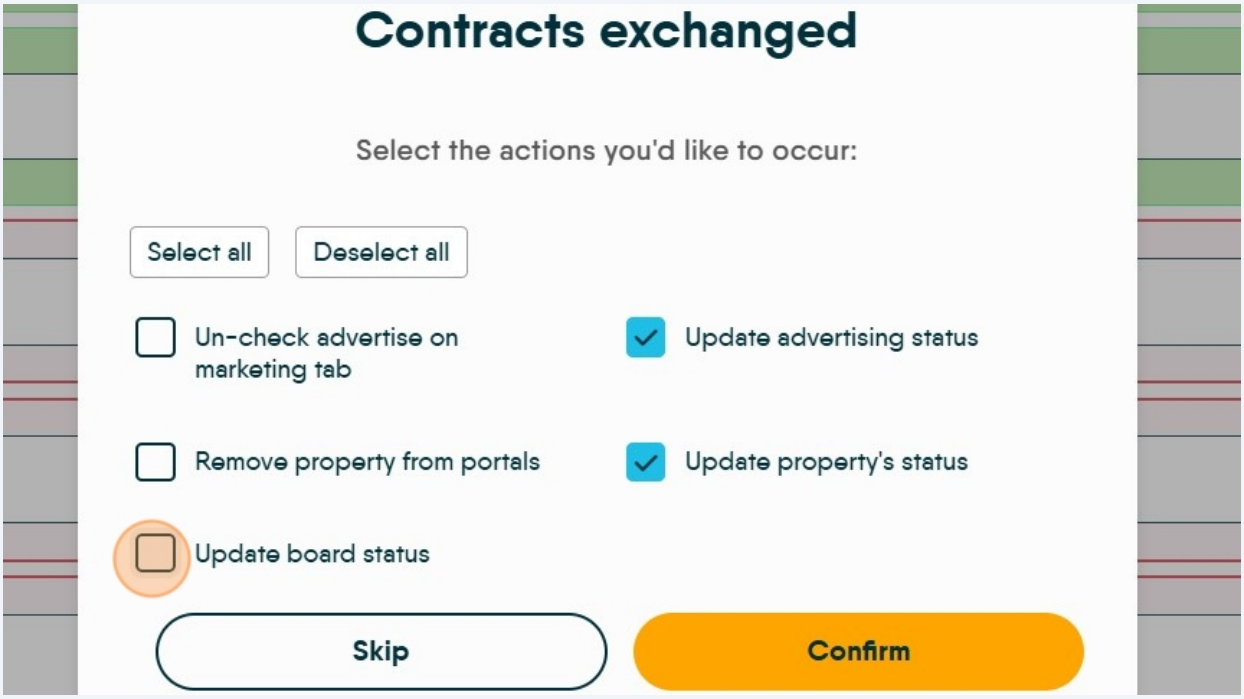


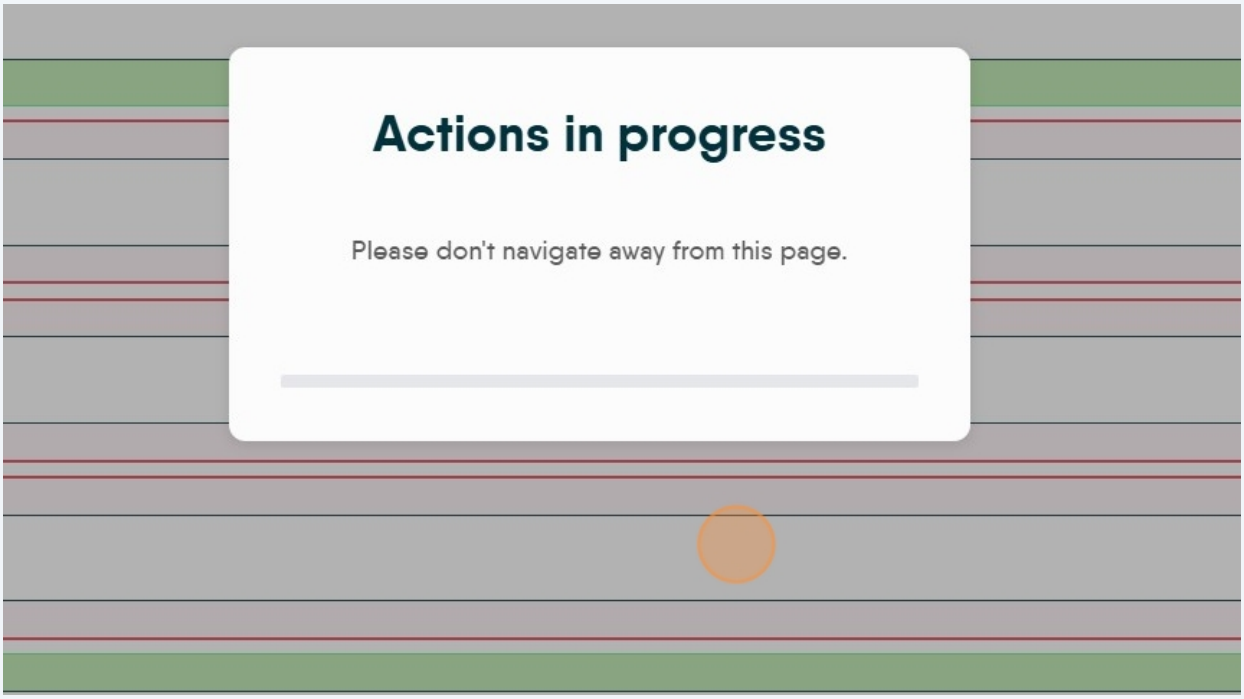



**4** In the Contracts Exchanged window, the actions will be ticked in accordance with your configuration.

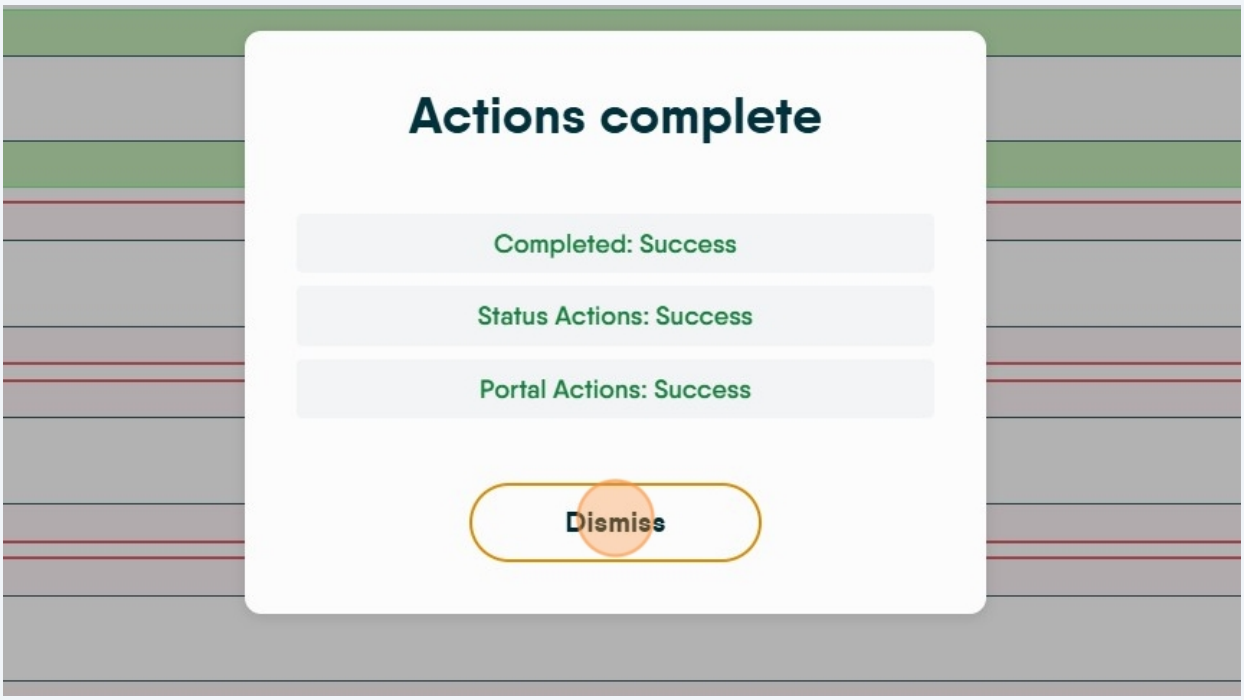
You can tick or untick any actions that you would or would not like to complete.

*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.



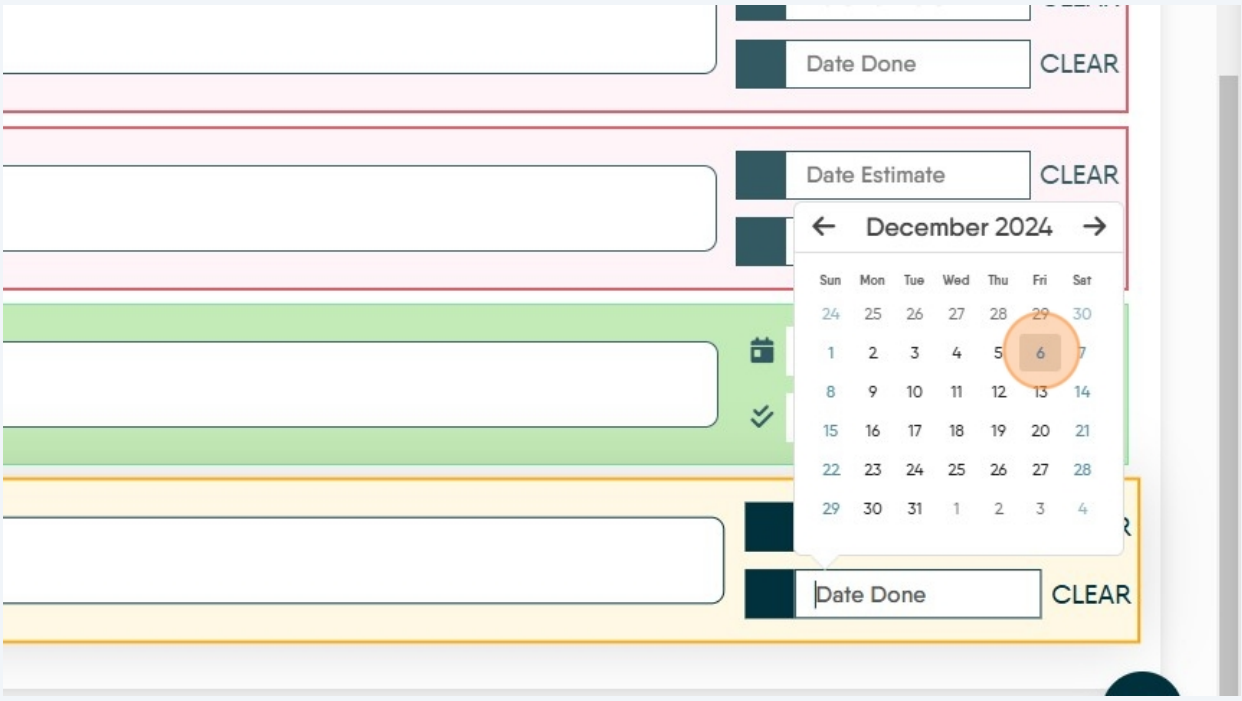



5 Click "Dismiss" to close the confirmation.



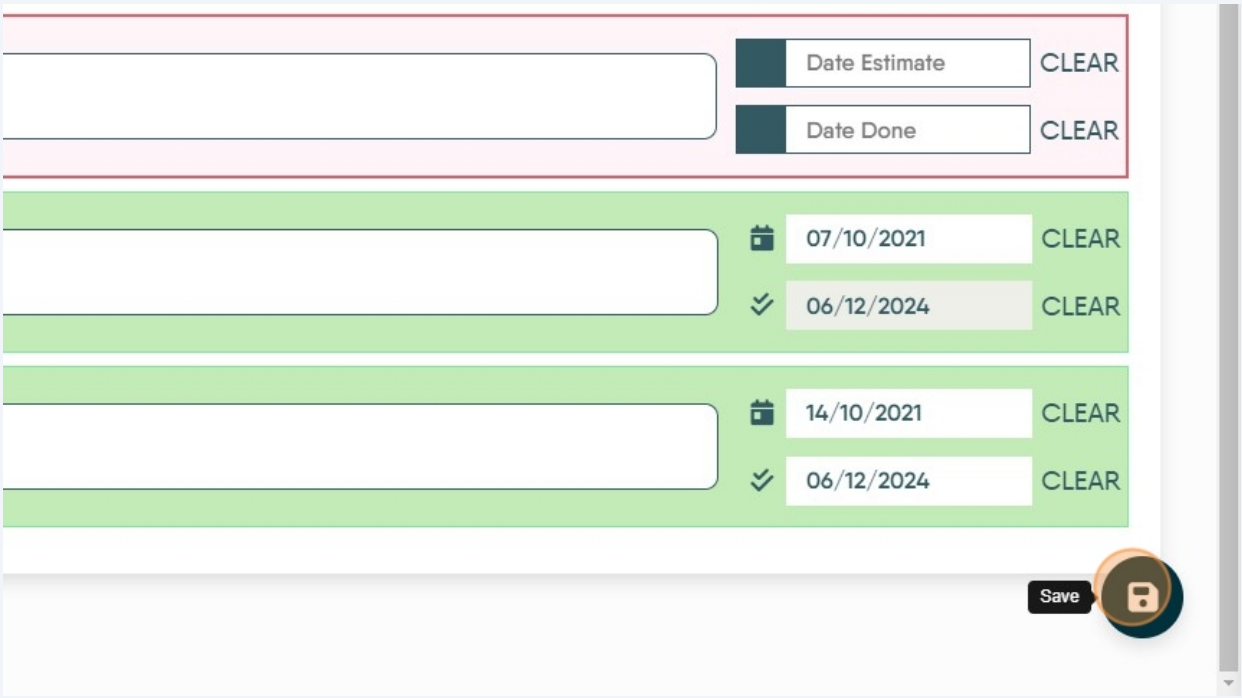

6 To trigger the Completion actions, against "Completion", click the "Date Done" field.
Select your date of completion in the pop-up calendar

Mortgage Offer
No Estimate
Date Estimate
CLEAR
23/10/2024
CLEAR
Searches Back
Searches Ordered +21 days
01/01/2025
CLEAR
01/11/2024
CLEAR
Enquiries Raised
No Estimate
Date Estimate
CLEAR
Date Done
CLEAR
Seller Signed
No Estimate
Date Estimate
CLEAR
Date Done
CLEAR
Buyer Signed
No Estimate
Date Estimate
CLEAR
Date Done
CLEAR
Contracts Exchanged
Completion -1week
07/10/2021
CLEAR
06/12/2024
CLEAR
Completion
Offer Accepted +3 months
14/10/2021
CLEAR
Date Done
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

**7** Click "Save".

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

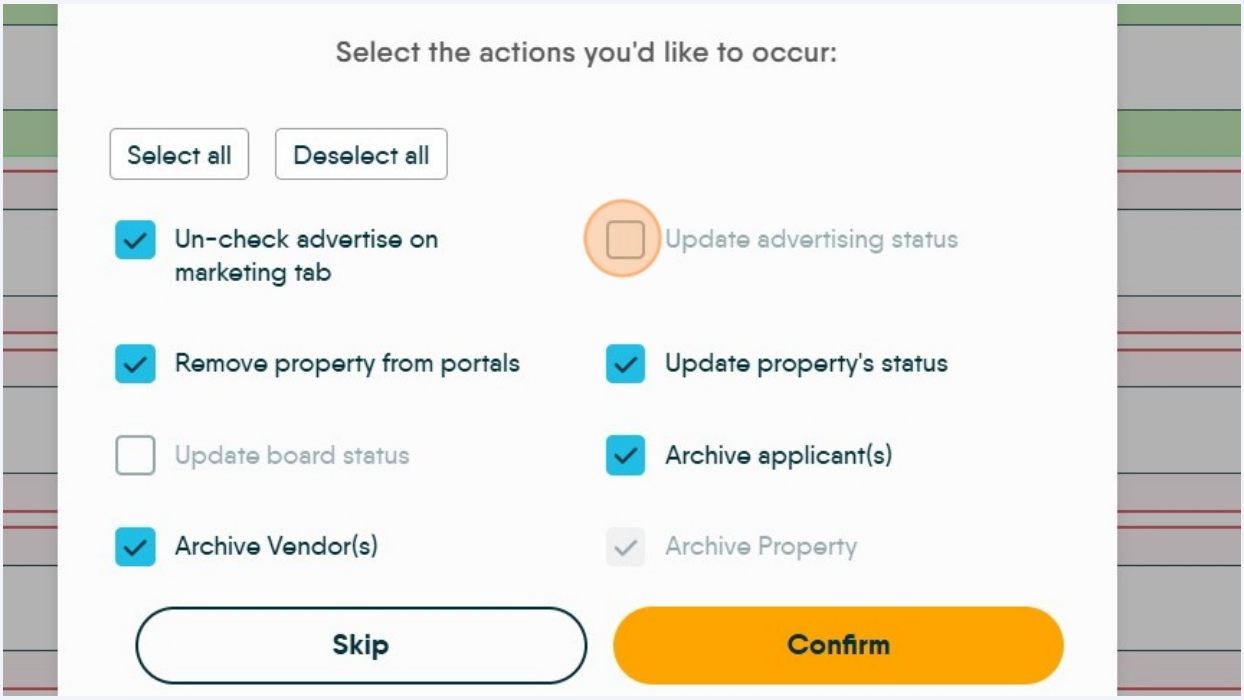


**8** In the Completion window, the actions will be ticked in accordance with your configuration.

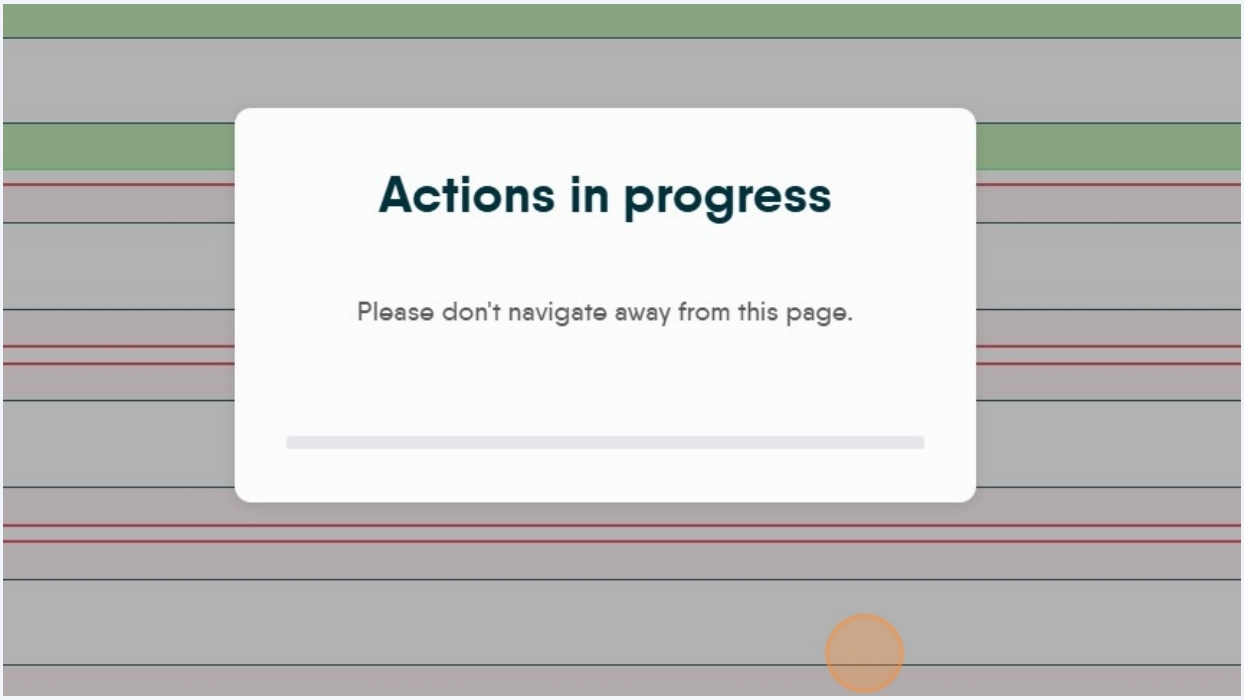
You can tick or untick any actions that you would or would not like to complete.

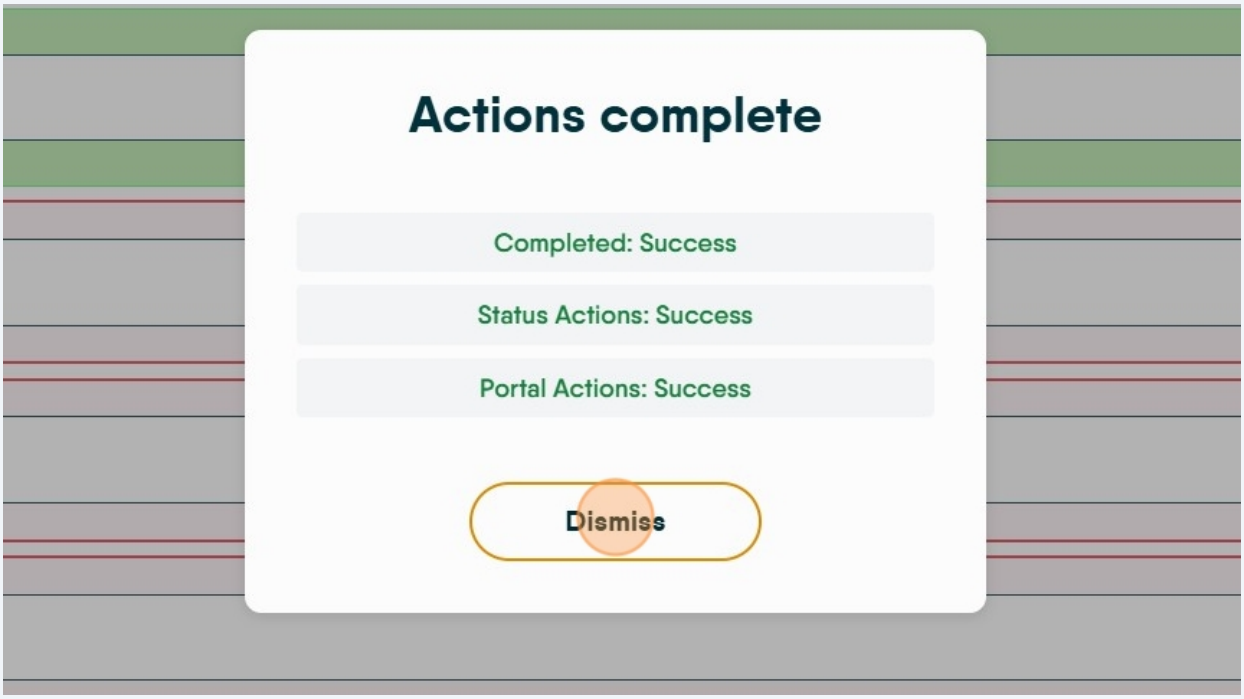
If you opt to archive the vendor, the property must also be archived.

*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.