

Enabling and Configuring Sales Progression Actions

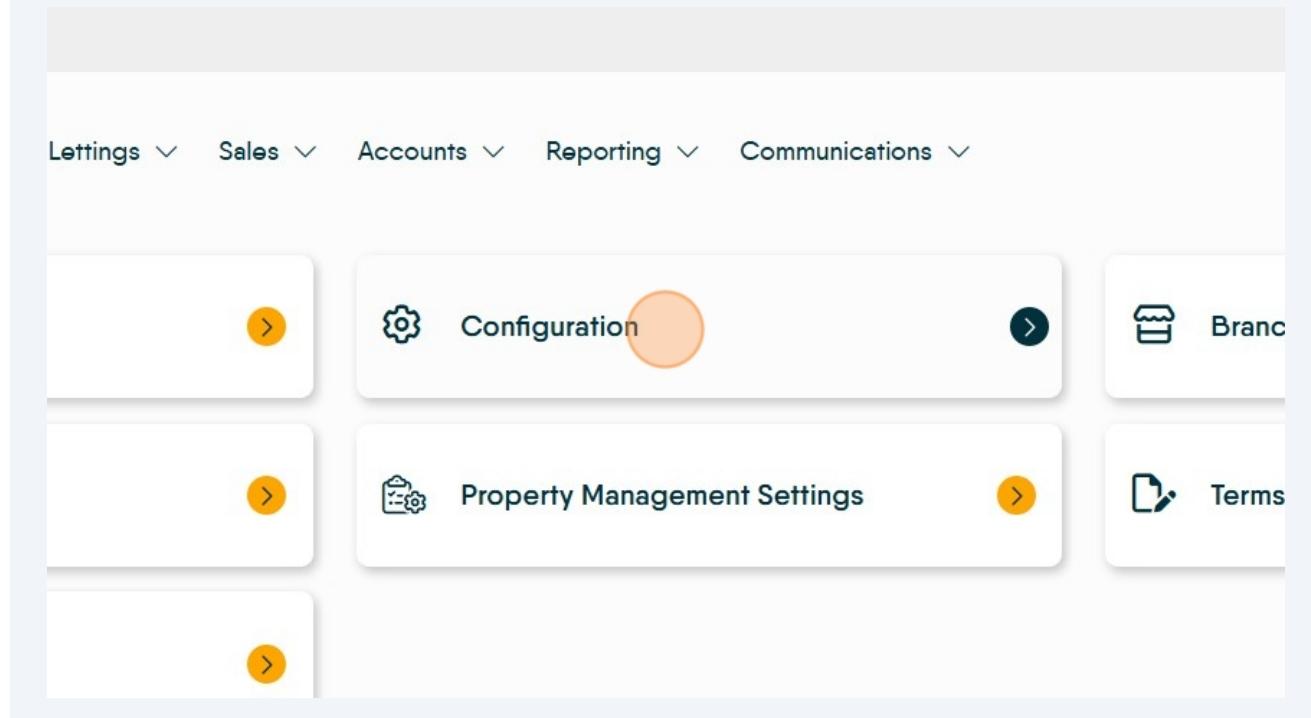


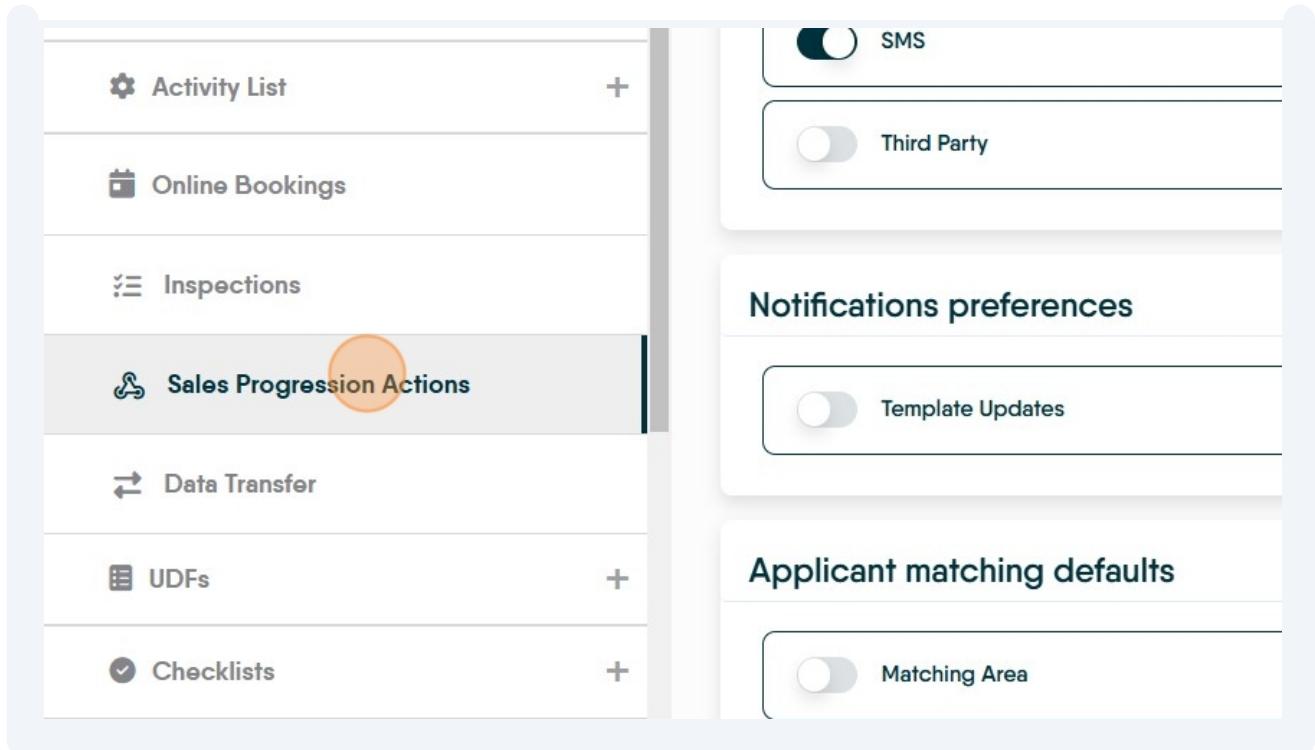
This guide provides a step-by-step approach to enabling and configuring Sales Progression Actions, which streamlines the process of managing contract exchanges and completions in CRM.

By automating actions based on specific triggers, users can improve efficiency and ensure timely updates, ultimately enhancing workflow and productivity. Additionally, the option to apply the same configurations across multiple branches simplifies management for larger organisations.

1 Navigate to <https://crm.iamproperty.com/Dashboards/ControlCentre>

2 Click into "Configuration"
Click "Sales Progression Actions" from the left side menu

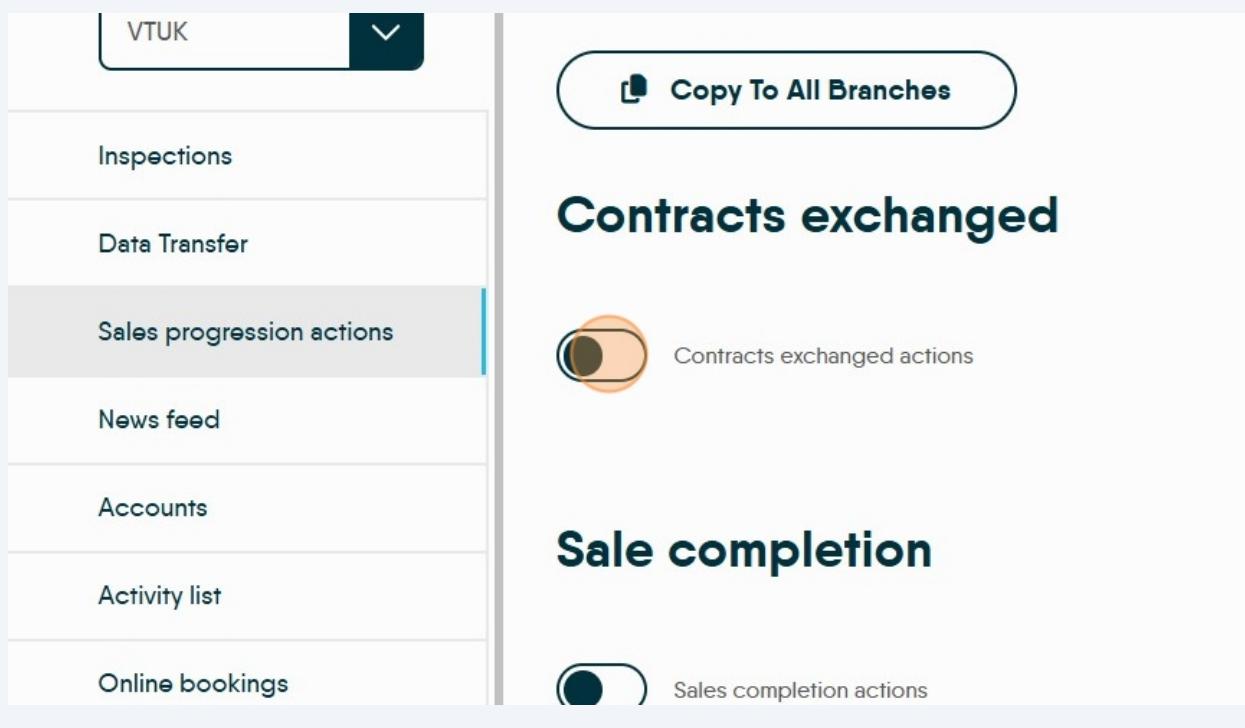




To configure actions to trigger when a date is entered in 'Date Done' on Contract Exchange in Sales Progression, see steps 5 - 7.

To configure actions to trigger when a date is entered in 'Date Done' on Completion in Sales Progression, see steps 8 - 10.

3 Click to enable the 'Contracts Exchanged Actions' toggle



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Copy To All Branches

Contracts exchanged

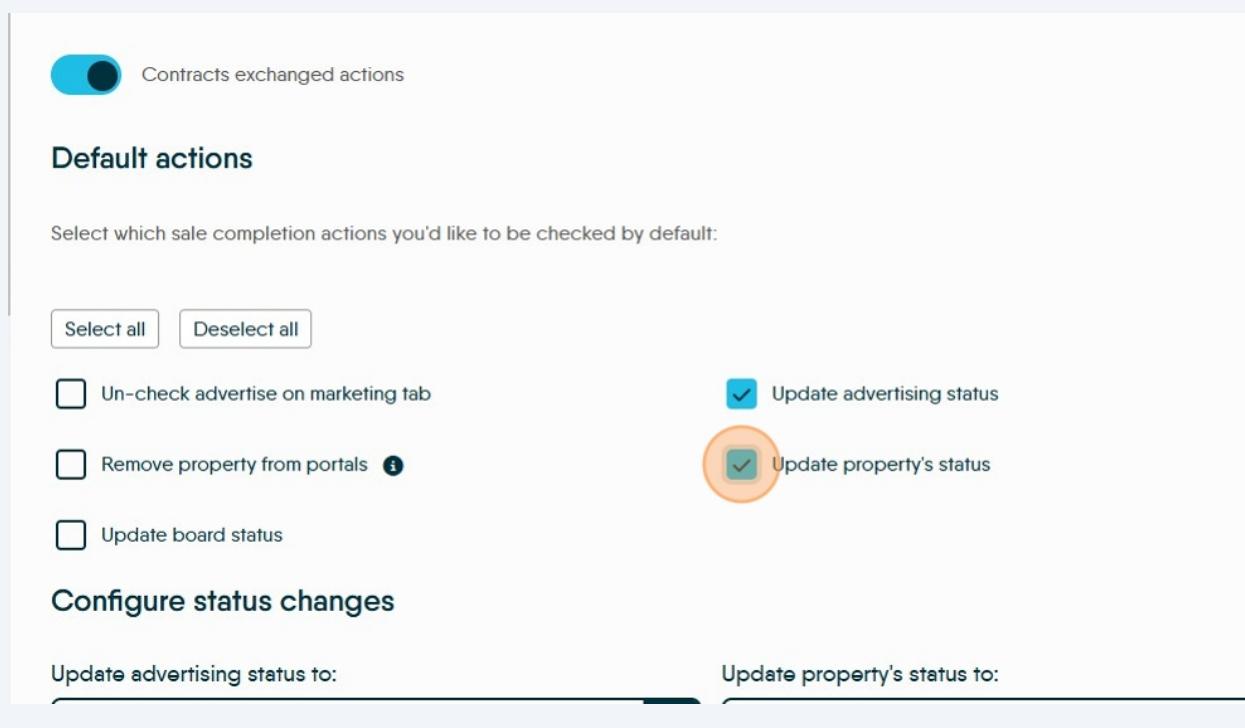
Contracts exchanged actions

Sale completion

Sales completion actions

4 Select all the actions you would like to happen on Contract Exchange.

You can use 'Select all' if you would like all actions to occur.



Contracts exchanged actions

Default actions

Select which sale completion actions you'd like to be checked by default:

Un-check advertise on marketing tab Update advertising status

Remove property from portals ⓘ Update property's status

Update board status

Configure status changes

Update advertising status to:

Update property's status to:

5

Select which status options you would like the automation to use.

For example, if you have selected 'Update Advertising Status', select which Advertising Status you would like it to be updated to.

<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	

Configure status changes

Update advertising status to:

Under Offer

Update property's status to:

Please select a property status

Update board status to:

Please select a board status

Sales Completions

6 Click to enable the 'Sales Completion Actions' toggle

Data Transfer

Sales progression actions

News feed

Accounts

Activity list

Online bookings

UDF settings

Checklists

Lookups

Update advertising status to:

Under Offer

Update board status to:

Please select a board status

Sale completion

 Sales completion actions

7 Select all the actions you would like to happen on Completion.

You can use 'Select all' if you would like all actions to occur.

Select which sale completion actions you'd like to be checked by default:

Un-check advertise on marketing tab

Remove property from portals (i)

Update board status

Archive Vendor(s)

Update advertising status

Update property's status

Archive applicant(s)

Archive Property (i)

Configure status changes

Update advertising status to:

Please select an advertising status

Update property's status to:

Please select a property status

Update board status to:

8

Select which status options you would like the automation to use.

For example, if you have selected 'Update Advertising Status', select which Advertising Status you would like it to be updated to.

Remove property from portals

Update board status

Archive Vendor(s)

Archive applicant(s)

Archive Property

Configure status changes

Update advertising status to:

Sold - SSTC

Update property's status to:

Please select a property status

Update board status to:

Please select a board status

9

Click "Save changes"

Reporting ▾ Communications ▾

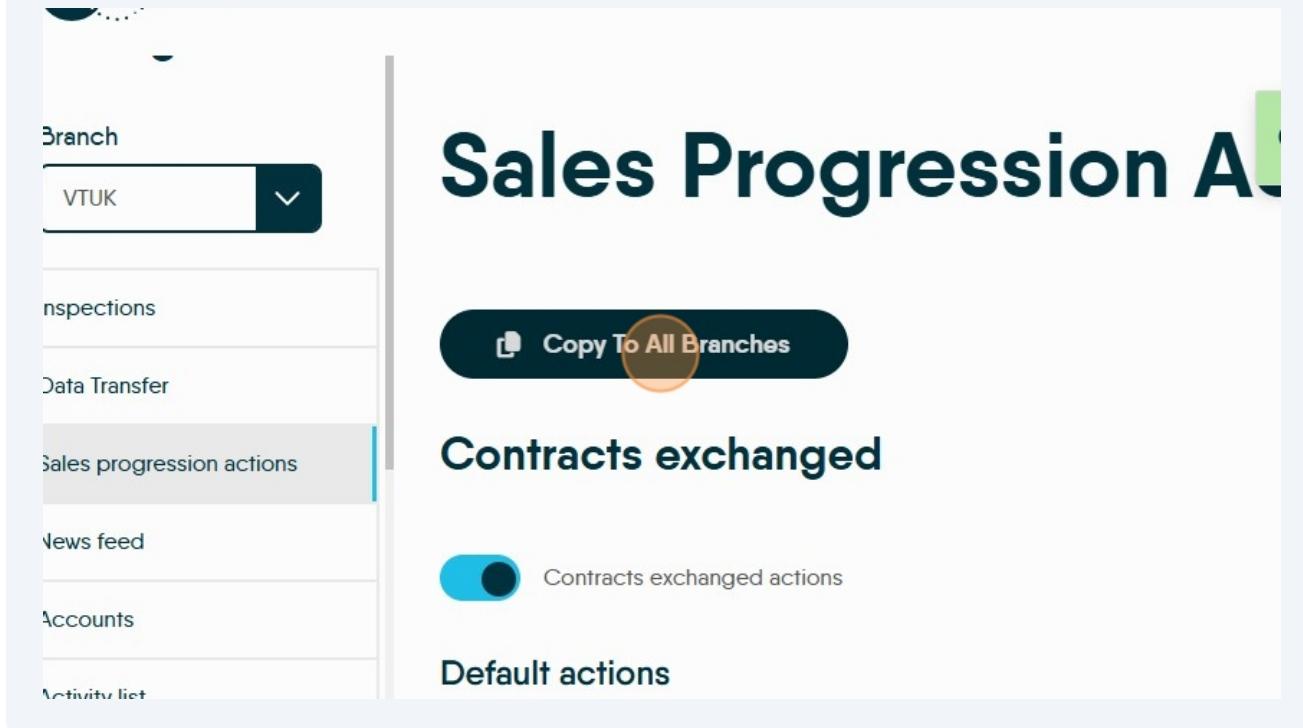
iamproperty CRM movebutler iamsold

My account

Save Changes

Progression Actions

10 If you would like all your branches to have the same Actions set, click "Copy to all branches"



11 Click "Yes, copy to all" to confirm.

