

Enabling and Configuring Sales Progression Actions

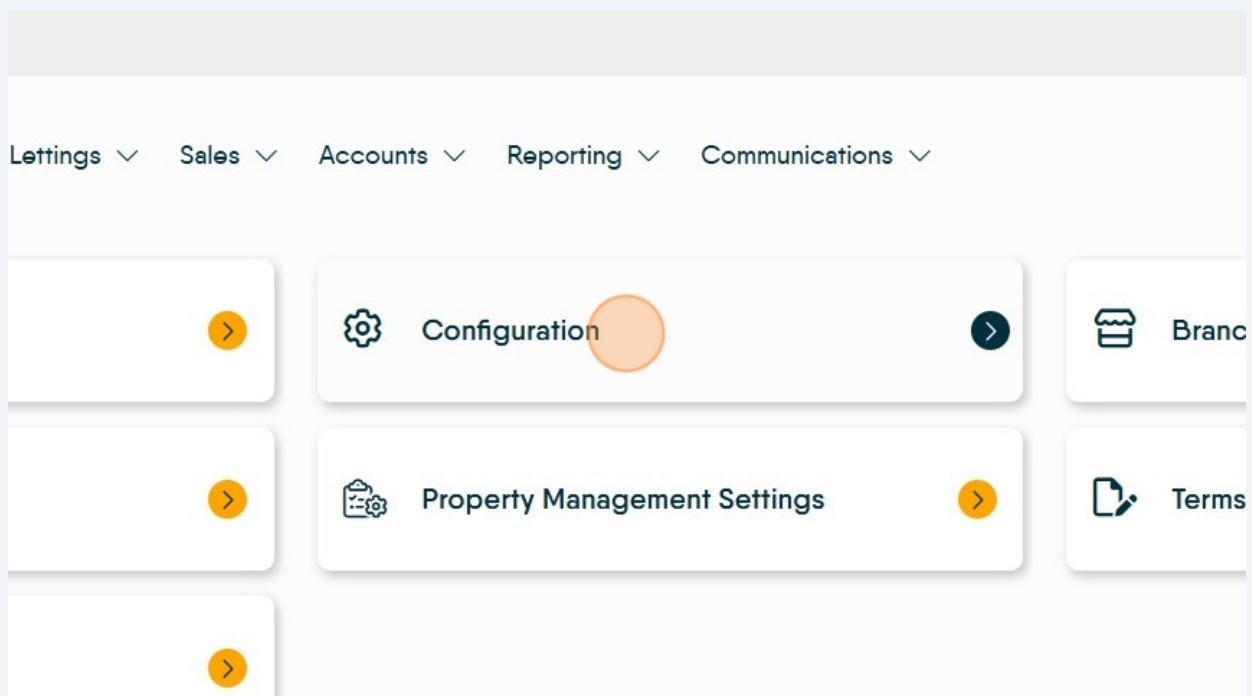


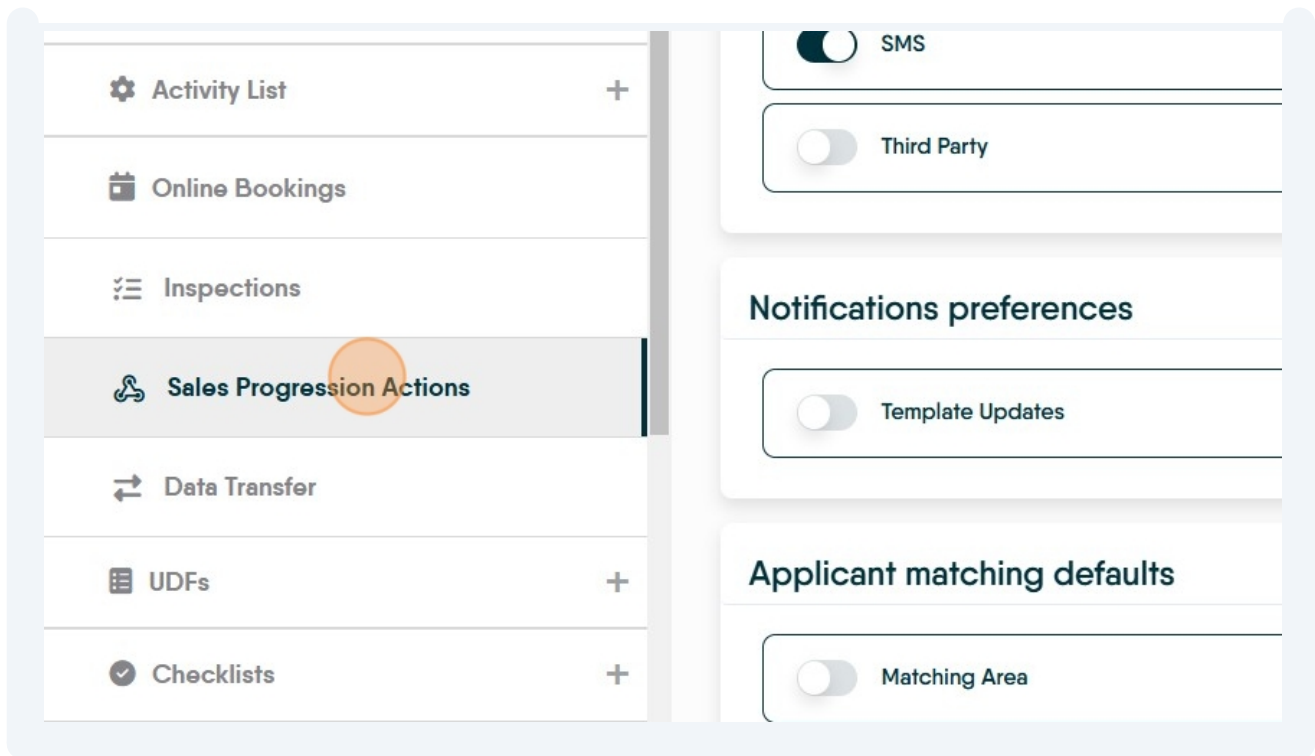
This guide provides a step-by-step approach to enabling and configuring Sales Progression Actions, which streamlines the process of managing contract exchanges and completions in CRM.

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

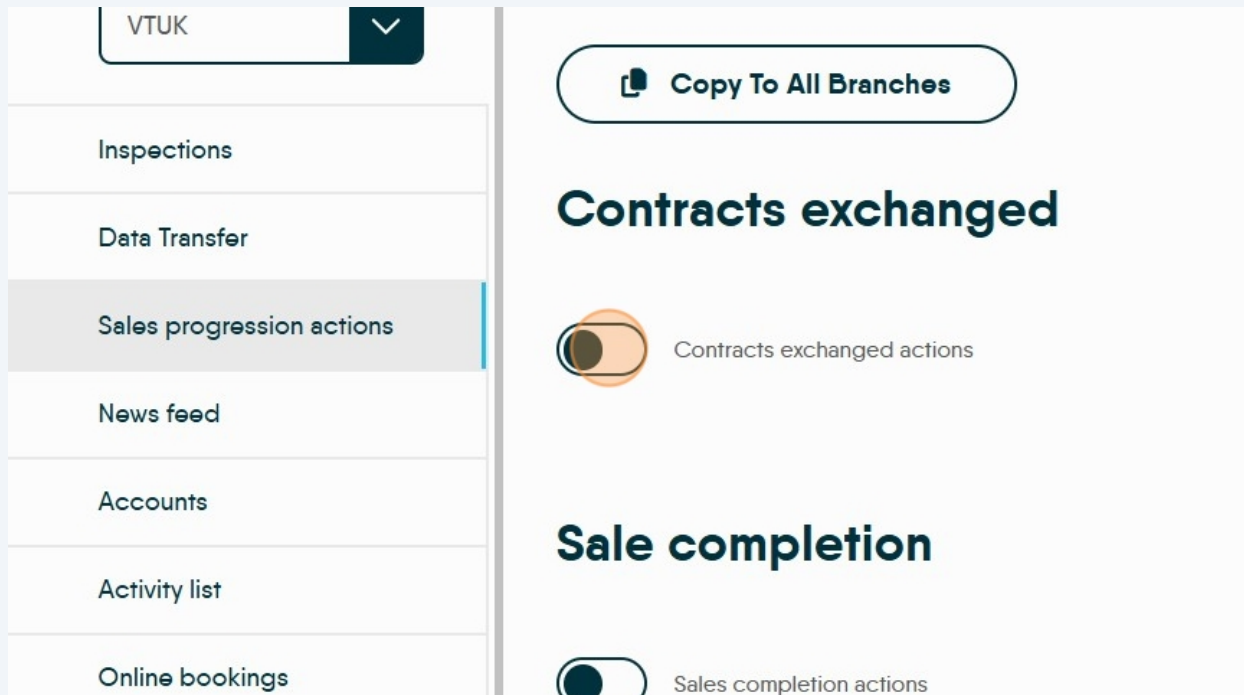




To configure actions to trigger when a date is entered in 'Date Done' on Contract Exchange in Sales Progression, see steps 5 - 7.

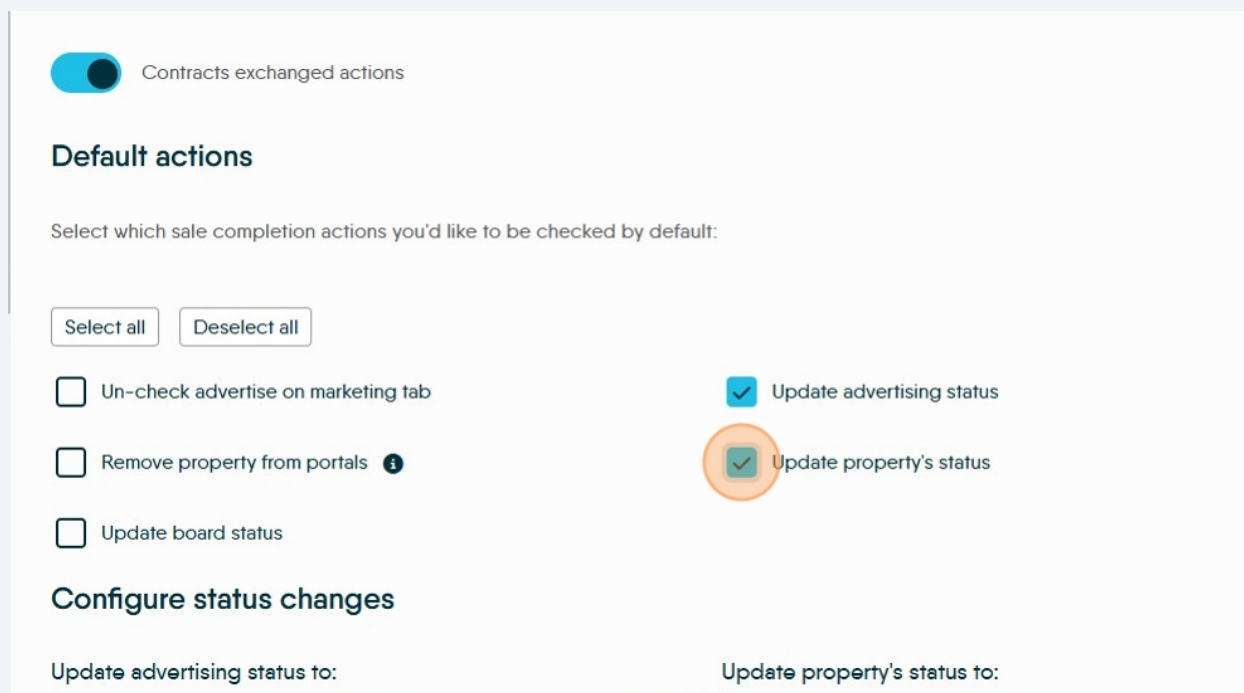
To configure actions to trigger when a date is entered in 'Date Done' on Completion in Sales Progression, see steps 8 - 10.

- 3 Click to enable the 'Contracts Exchanged Actions' toggle



- 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.



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

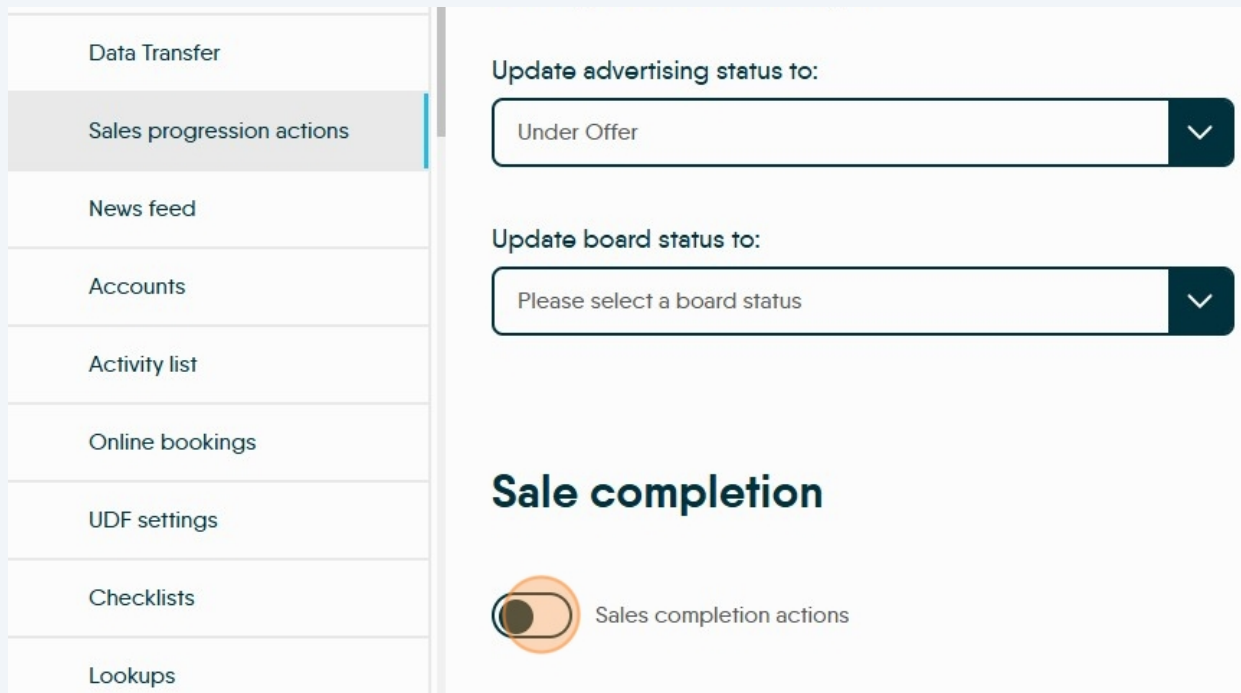
Update board status to:

Please select a board status



Sales Completions

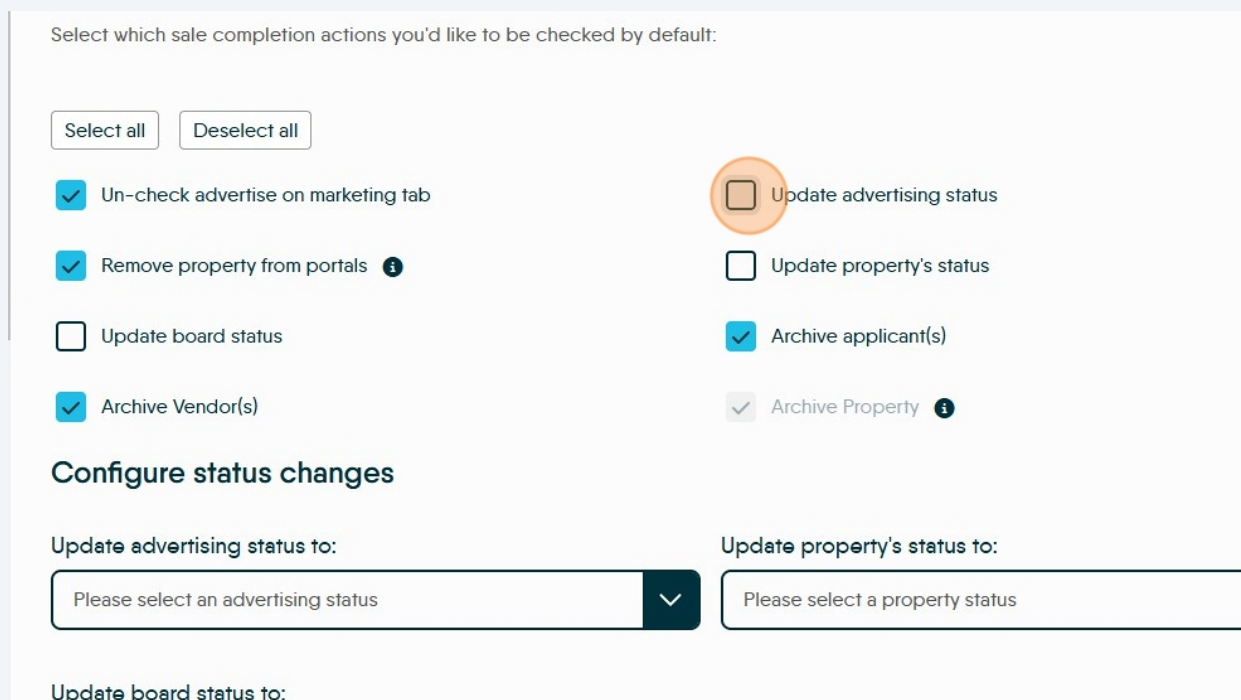
6 Click to enable the 'Sales Completion Actions' toggle



The screenshot shows a sidebar menu on the left with the following items: Data Transfer, Sales progression actions (highlighted), News feed, Accounts, Activity list, Online bookings, UDF settings, Checklists, and Lookups. The main content area on the right has two dropdown menus: 'Update advertising status to:' with 'Under Offer' selected, and 'Update board status to:' with 'Please select a board status' selected. Below these is a section titled 'Sale completion' with a toggle switch labeled 'Sales completion actions' that is currently turned off.

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.



The screenshot shows the 'Configure status changes' section. At the top, it says 'Select which sale completion actions you'd like to be checked by default:'. Below this are two buttons: 'Select all' and 'Deselect all'. There are two columns of checkboxes. The left column has: 'Un-check advertise on marketing tab' (checked), 'Remove property from portals' (checked with an info icon), 'Update board status' (unchecked), and 'Archive Vendor(s)' (checked). The right column has: 'Update advertising status' (unchecked, highlighted with an orange circle), 'Update property's status' (unchecked), 'Archive applicant(s)' (checked), and 'Archive Property' (checked with an info icon). Below the checkboxes is a section titled 'Configure status changes' with two dropdown menus: 'Update advertising status to:' with 'Please select an advertising status' selected, and 'Update property's status to:' with 'Please select a property status' selected. At the bottom, there is a label '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 property's status

☐ Update board status ☒ Archive applicant(s)

☒ Archive Vendor(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"

iamproperty CRM movebutler iamsold

Reporting Communications

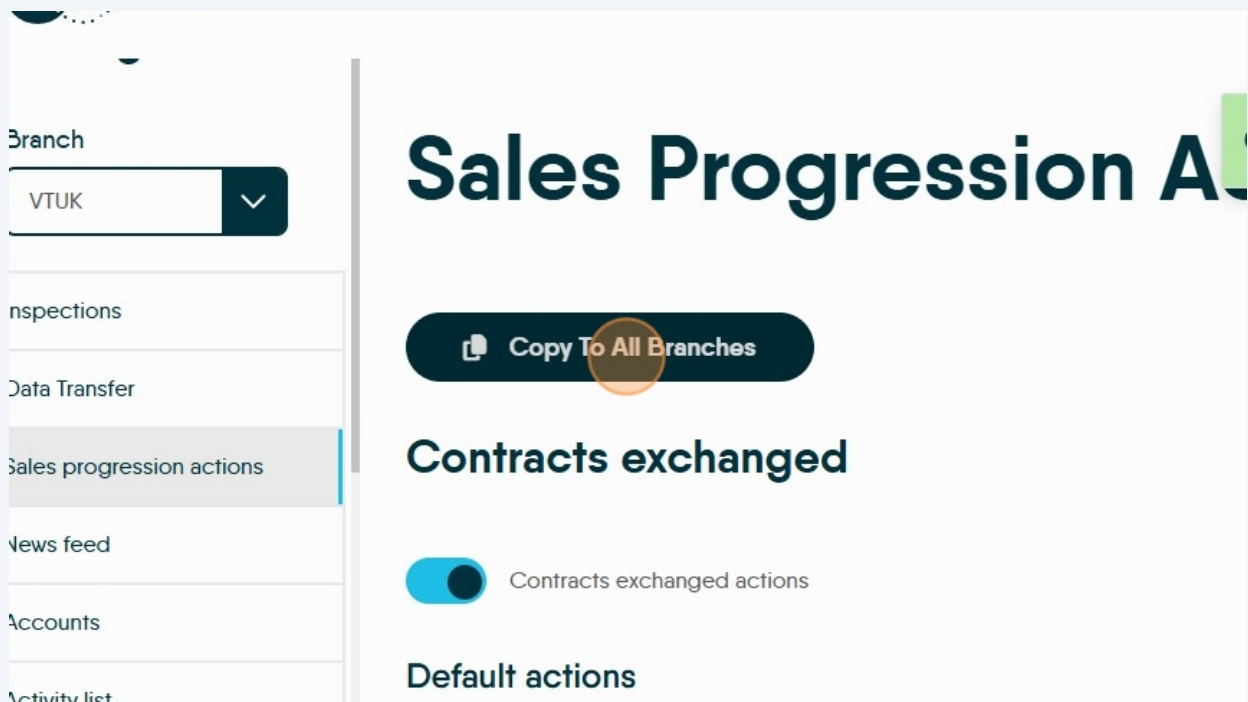
My account

Progression Actions

Save Changes

10

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



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Click "Yes, copy to all" to confirm.

