

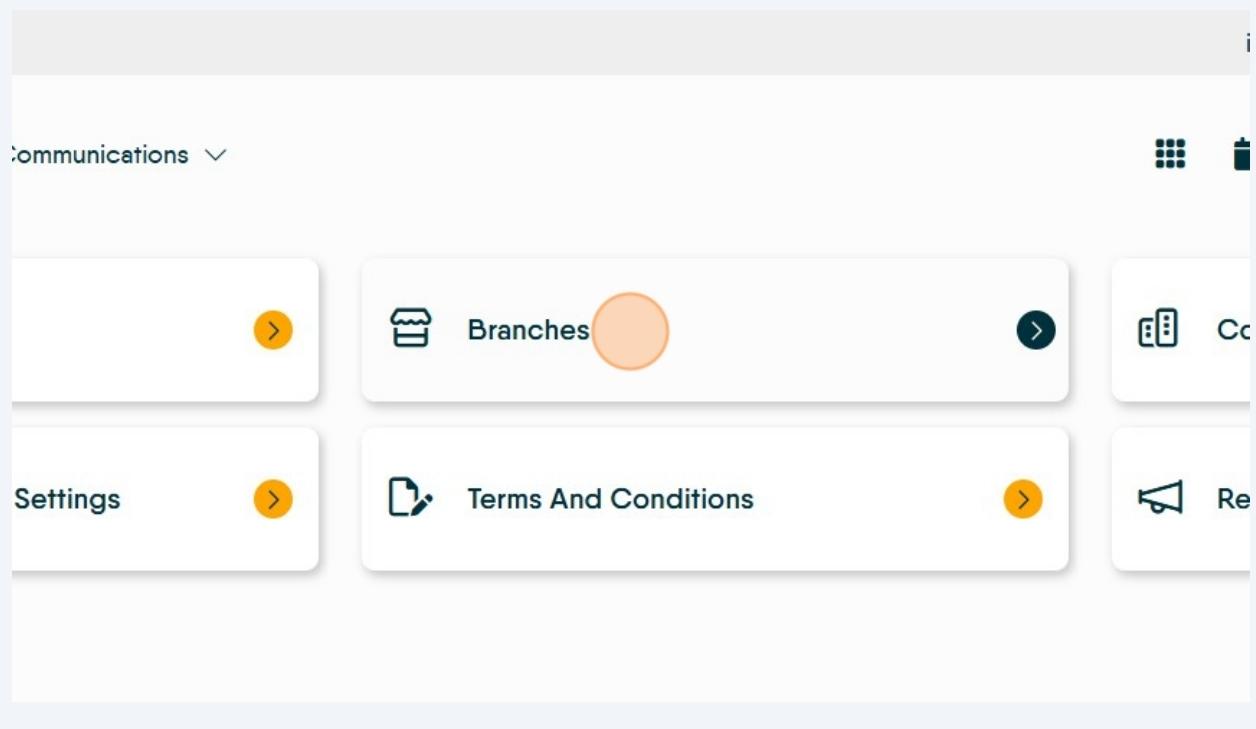
Adding the Sales Progression Automation Module to Branches and Users

This guide provides step-by-step instructions for adding the Sales Progression Automation module to specific branches and users within the CRM system.

By following this guide, users can enhance their sales processes and ensure that key team members have access to valuable automation tools. It simplifies the setup process, ensuring that branches and individual users can quickly benefit from improved sales tracking and efficiency.

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

- 2 Click into "Branches"



- 3 Click the branch you wish to add the Sales Progression Automation to. That Branch will be highlighted in the list.

Click "Sales Automation" in the module list. It will change from Red to Green.

If "Sales Automation" is already green then the branch already has it, so skip this step.

The screenshot shows a software interface with a list of branches on the left and a module list on the right.

Branch List:

Branch	Phone 1
2019 Block	
Barrings Street	01865 860870
Beagle Property Agents	00000000000
Bedford	01865 860870
Brochure Templates	0123012335
Bunce & Co	111111
BunceSYNC	07374938234
Camerons Branch	01865860871

Module List:

- Accounts
- E-Sign
- Inspections
- Management Info
- Sales
- SalesAutomation
- Task Manager

Details for the Bedford branch:

Address: 12 Bedford Lane, Oxford, OX29 6SH

Address: Rowan Court North Leigh Business P...

Address: 8 Barleyfield Way, Witney, OX28 1AB

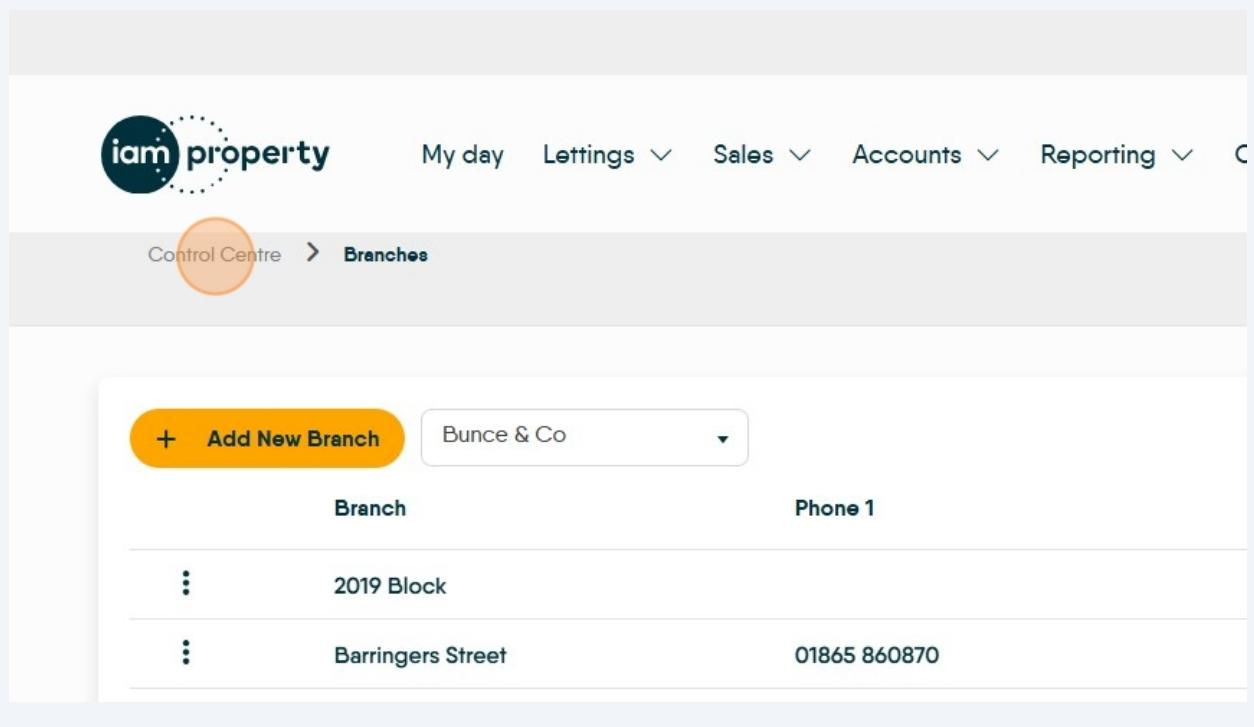
Address: Cundall Johnston & Partners L L P H...

Address: VTUK Rowan House, North Leigh Busi...

Address: VTUK Rowan House, North Leigh Busi...

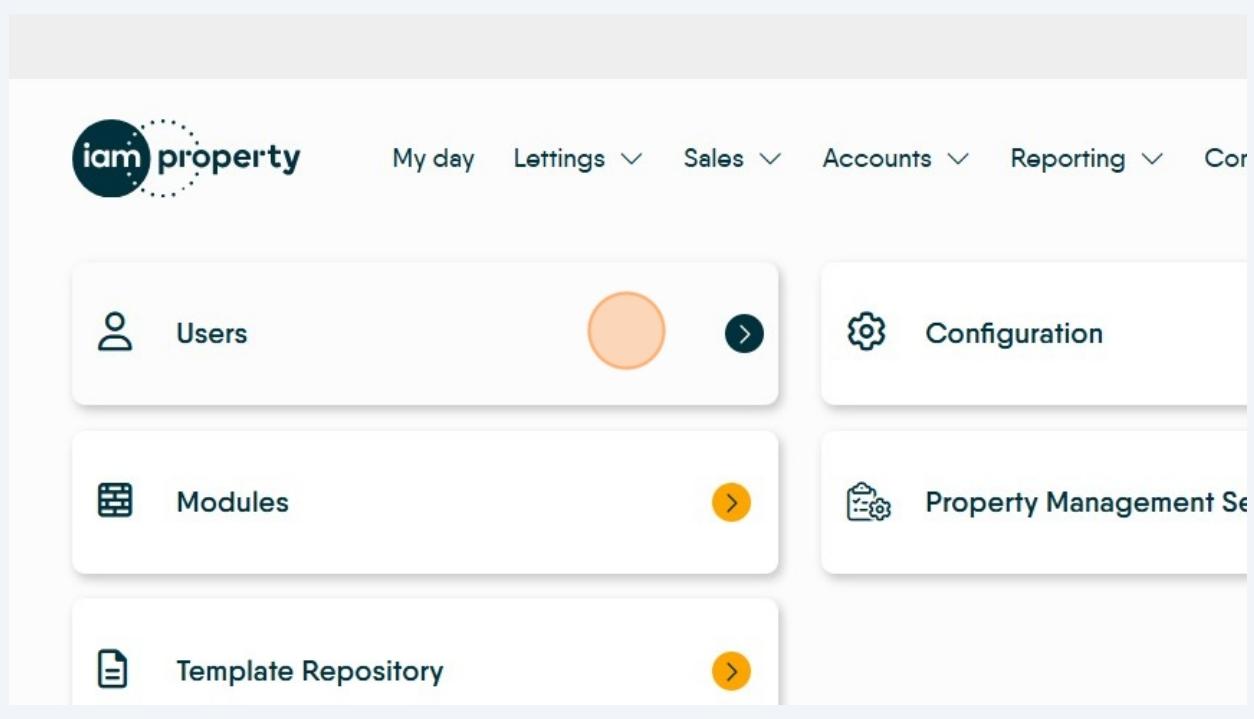
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4 Return to "Control Centre"



The screenshot shows the 'Control Centre' section of the iam property software. At the top, there is a navigation bar with links for 'My day', 'Lettings', 'Sales', 'Accounts', 'Reporting', and 'Control Centre'. Below this, a breadcrumb navigation shows 'Control Centre > Branches'. A yellow button labeled '+ Add New Branch' is visible. A dropdown menu is open, showing 'Bunce & Co' as the selected branch. The main content area displays a table with two rows of branch information. The columns are 'Branch' and 'Phone 1'. The first row shows '2019 Block' and '01865 860870'. The second row shows 'Barringers Street' and '01865 860870'. Each row has a three-dot menu icon on the left.

5 Click into "Users"
Uncheck the top listed user
Search for, or locate in the list, the user you wish to update
Tick the checkbox against the user you wish to give access to the Sales Progression Automation



The screenshot shows the main navigation menu of the iam property software. At the top, there is a navigation bar with links for 'My day', 'Lettings', 'Sales', 'Accounts', 'Reporting', and 'Control Centre'. Below this, there are four main menu items: 'Users' (with a person icon), 'Configuration' (with a gear icon), 'Modules' (with a grid icon), and 'Property Management Services' (with a gear and document icon). Each menu item has a yellow circular icon with a right-pointing arrow to its right.

Clear filters

Company
Bunce & CoBranch
AllFilter Status
All (excluding Archived)

Contractors

+ Add New User

Register Portal Users

	Name	Email
⋮	<input checked="" type="checkbox"/> sync user	tb+propman@vtuk.com
⋮	<input type="checkbox"/> Tim Bunce	tb+user@vtuk.com
⋮	<input type="checkbox"/> David Wiltron	david.wilton@vtuk.com
⋮	<input type="checkbox"/> Zack Ryall	zack.ryall@vtuk.com
⋮	<input type="checkbox"/> Tom Herzog	thomas.herzig@iamproperty.com
⋮	<input type="checkbox"/> Other users	Other users



M

Search



Username

syncuser34

TB&Co

DavidWiltron

Modules

Accounts

Client Portals

Control Centre

E-Sign

Inspections

Clear filters

Company: Bunce & Co

Branch: All

Filter Status: All (excluding Archived)

Contractors

+ Add New User **Register Portal Users**

<input type="checkbox"/>	Name	Email
<input checked="" type="checkbox"/>	Sam Fender	tb+user2@vtuk.com

6 Click "Sales Automation" in the module list. It will change from Red to Green.

id	Username
user2@vtuk.com	SamFender

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- Accounts
- Client Portals
- Control Centre
- E-Sign
- Inspections
- LetZone
- Lettings
- Management Info
- Property Management
- Reporting Dashboard
- Sales
- SalesAutomation**

Roles

- Super Admin
- Administrator
- Neutralator



Tip! It's recommended the user logs out and back in in order for the change to take effect.