

Adding the Sales Progression Automation Module to Branches and Users

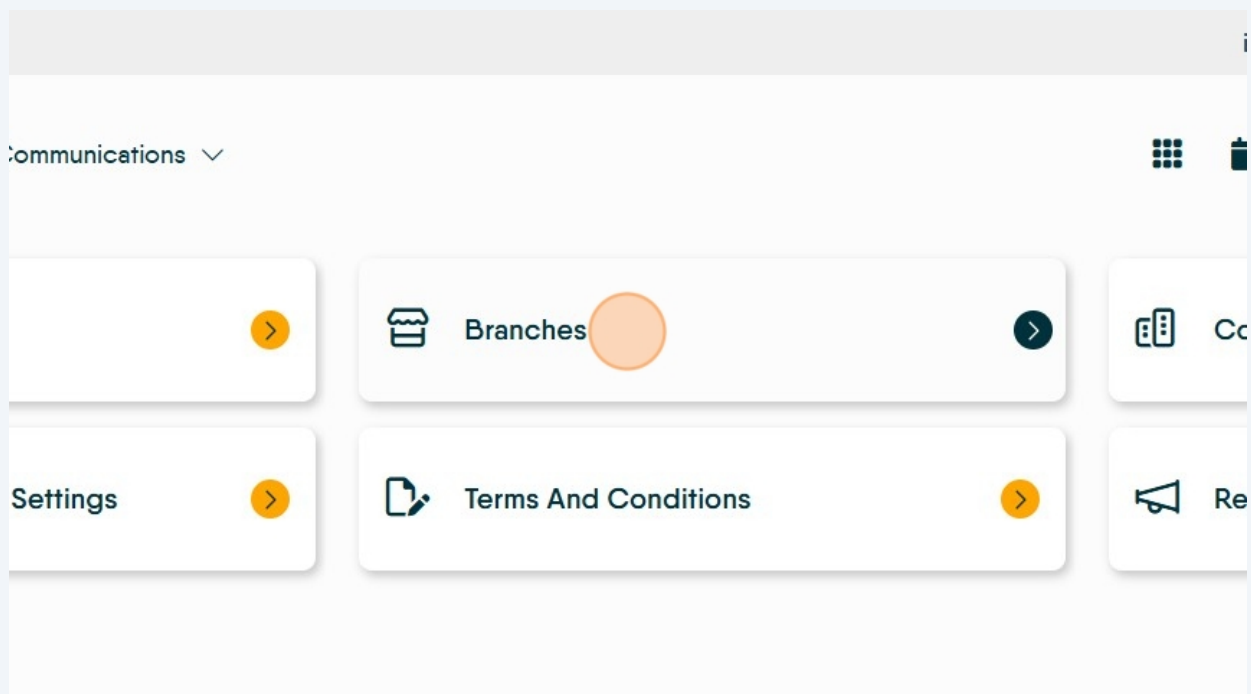


This guide provides step-by-step instructions for adding the Sales Progression Automation module to specific branches and users within the CRM system.

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 displays a software interface with a table of branches and a sidebar menu. The table has two columns: "Branch" and "Phone 1". The "Bedford" branch is highlighted with an orange circle. Below the table, a dropdown menu is open, showing a list of addresses. The "SalesAutomation" option in the sidebar menu is also highlighted with an orange circle.

Branch	Phone 1
2019 Block	
Barringers Street	01865 860870
Beagle Property Agents	000000000000
Bedford	01865 860870
Brochure Templates	0123012335
Bunce & Co	11111
BunceSYNC	07374938234
Camerons Branch	01865860871
Christians Branch	01865 860871

12 Bedford Lane, Oxford, OX29 6SH

Rowan Court North Leigh Business P...

8 Barleyfield Way, Witney, OX28 1AB

Cundall Johnston & Partners L L P H...

VTUK Rowan House, North Leigh Busi...

VTUK Rowan House, North Leigh Busi...

17 Oakfield Avenue, Witney, OX28 1AB

Accounts

E-Sign

Inspections

Management Info

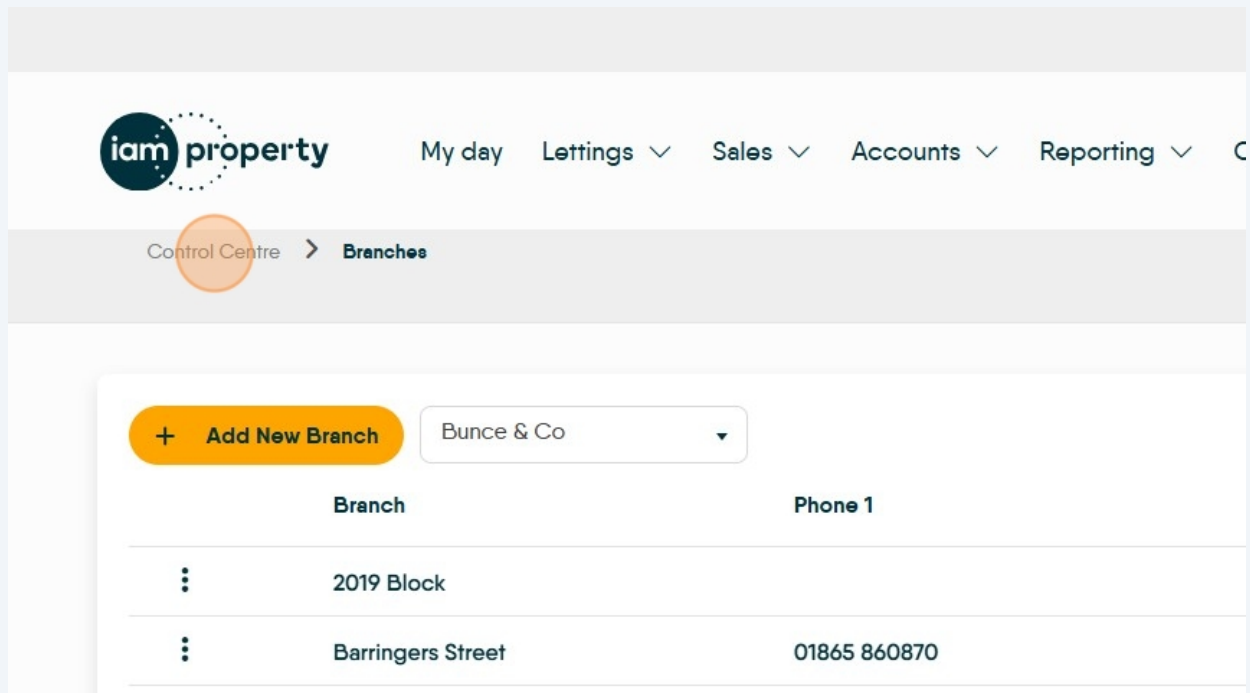
Sales

SalesAutomation

Task Manager

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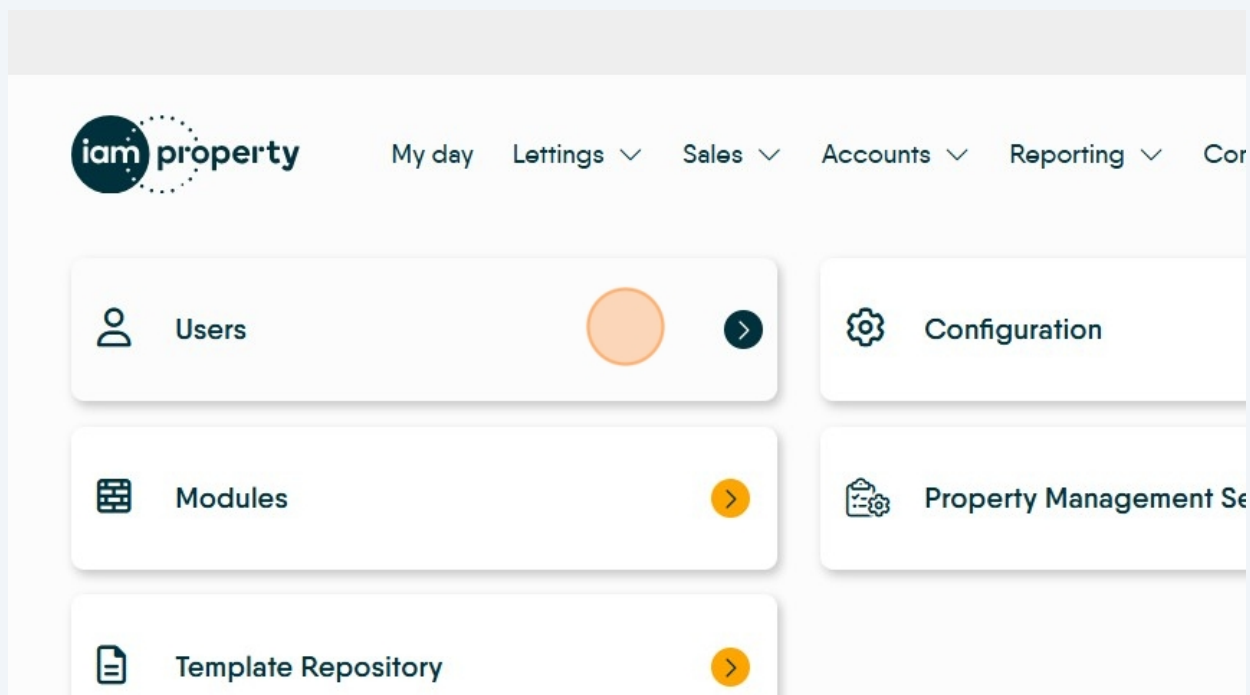
4 Return to "Control Centre"



The screenshot shows the 'iam property' dashboard. The top navigation bar includes 'My day', 'Lettings', 'Sales', 'Accounts', 'Reporting', and 'Control Centre'. The 'Control Centre' is highlighted with an orange circle. Below it, the breadcrumb trail shows 'Control Centre > Branches'. The main content area features a table with columns 'Branch' and 'Phone 1'. The table lists two branches: '2019 Block' and 'Barringers Street' (with phone number '01865 860870'). An orange circle highlights the 'Add New Branch' button and the 'Bunce & Co' dropdown menu.

Branch	Phone 1
2019 Block	
Barringers Street	01865 860870

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 'iam property' dashboard. The top navigation bar includes 'My day', 'Lettings', 'Sales', 'Accounts', 'Reporting', and 'Control Centre'. The 'Control Centre' is highlighted with an orange circle. Below it, the breadcrumb trail shows 'Control Centre > Users'. The main content area features a grid of cards. The 'Users' card is highlighted with an orange circle and a right arrow. The 'Configuration' card is also visible. The 'Modules' card has a right arrow. The 'Template Repository' card has a right arrow. The 'Property Management System' card is partially visible.

Users	Configuration
2019 Block	
Barringers Street	01865 860870

Clear filtersCompany
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 Herzig	thomas.herzig@iamproperty.com
⋮	<input type="checkbox"/>	Oliver M...	oliver.m...@vtuk.com



M

Search



Username

syncuser34

TB&Co

DavidWilton

Modules

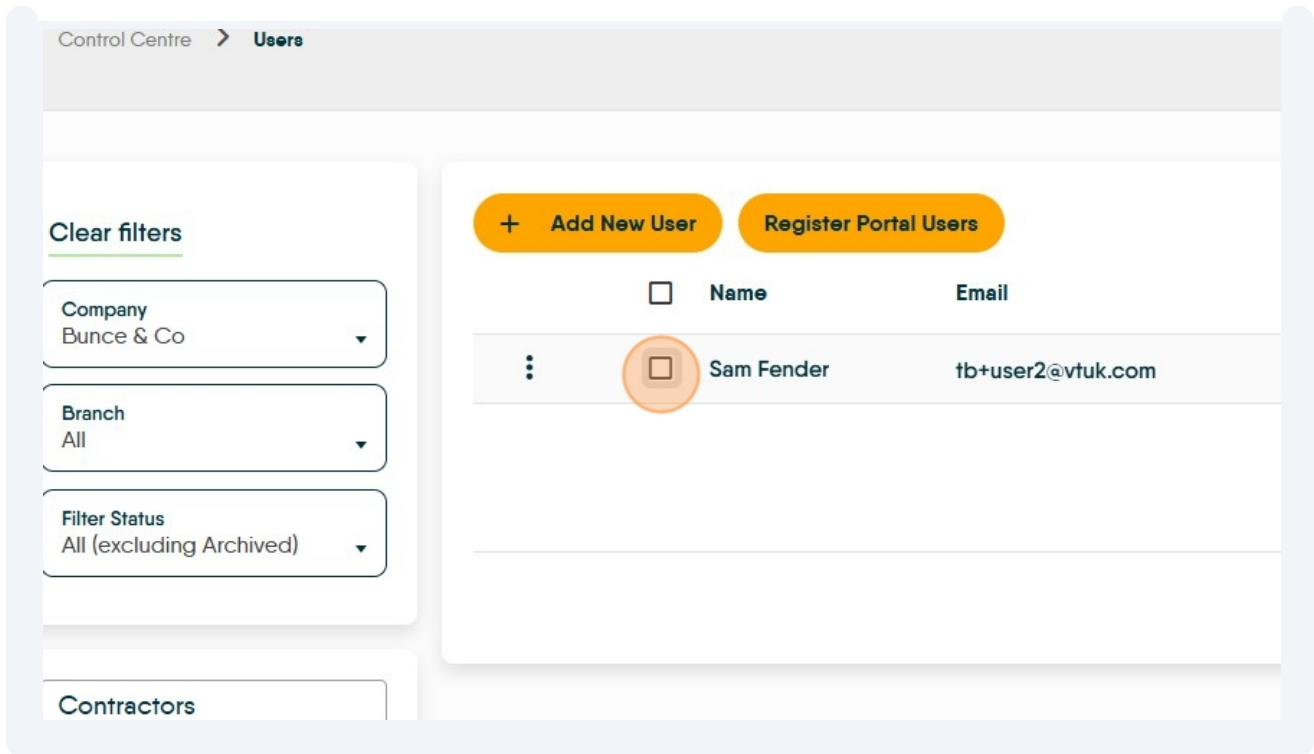
Accounts

Client Portals

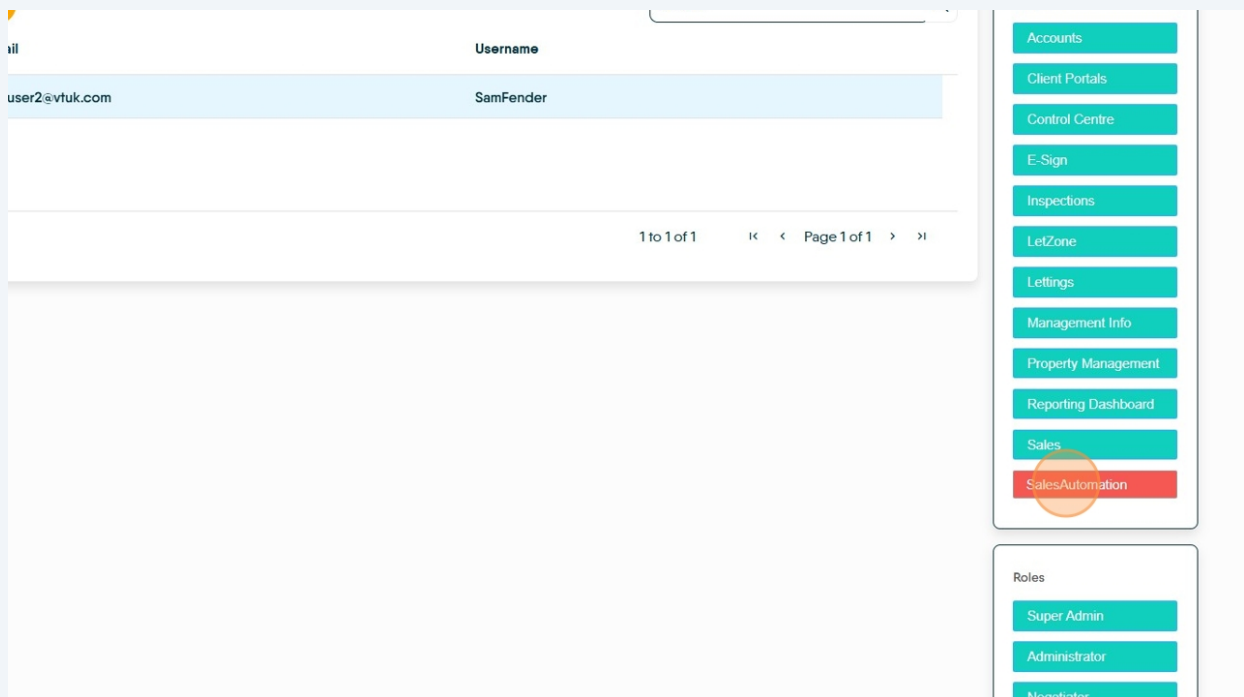
Control Centre

E-Sign

Inspections



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



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