

Configuring Vision+ Referencing Checks



This guide provides a straightforward approach to configuring Vision+ Referencing Checks.

It breaks down the configuration steps clearly, ensuring that even those with minimal technical expertise can follow along.

By leveraging this guide, users can enhance their CRM functionality, improve efficiency, and ensure a smoother experience in managing client referencing. Don't miss out on optimising your property management workflow!



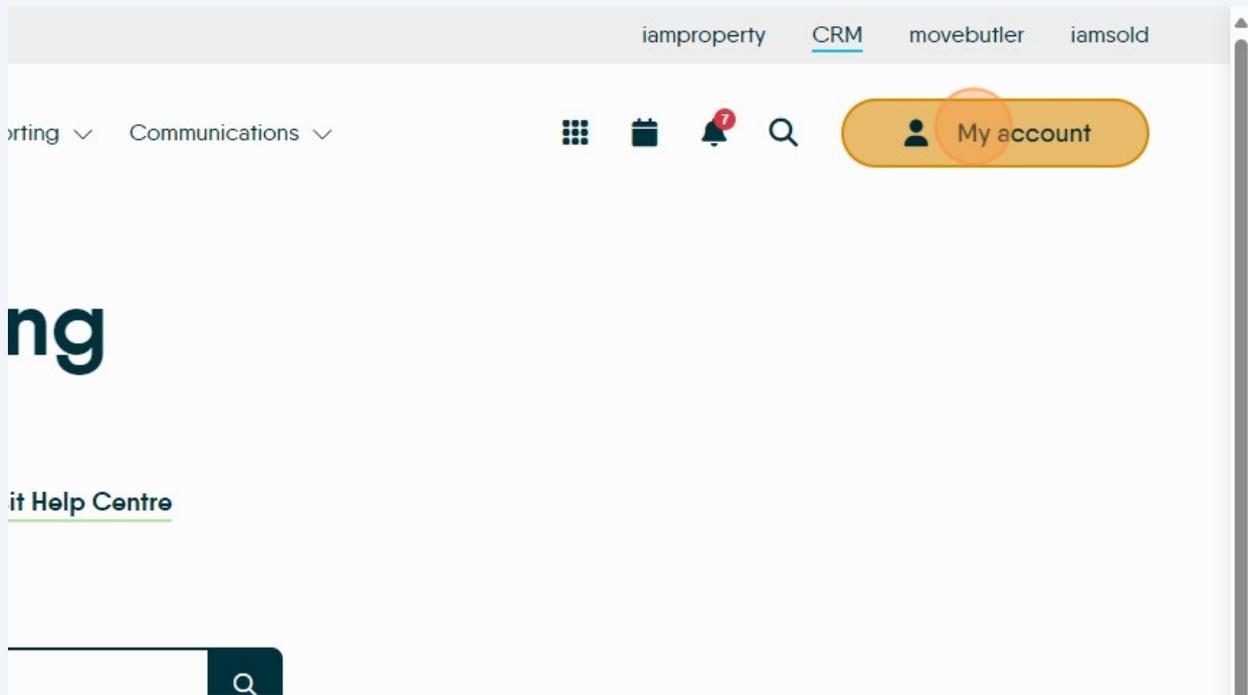
To use Vision+ you will need to have a Vision+ account and the associated Client ID and Secret key.

If you require a contact at Vision+ please ask Support (crm.support@iamproperty.com) or Training (crm.training@iamproperty.com)

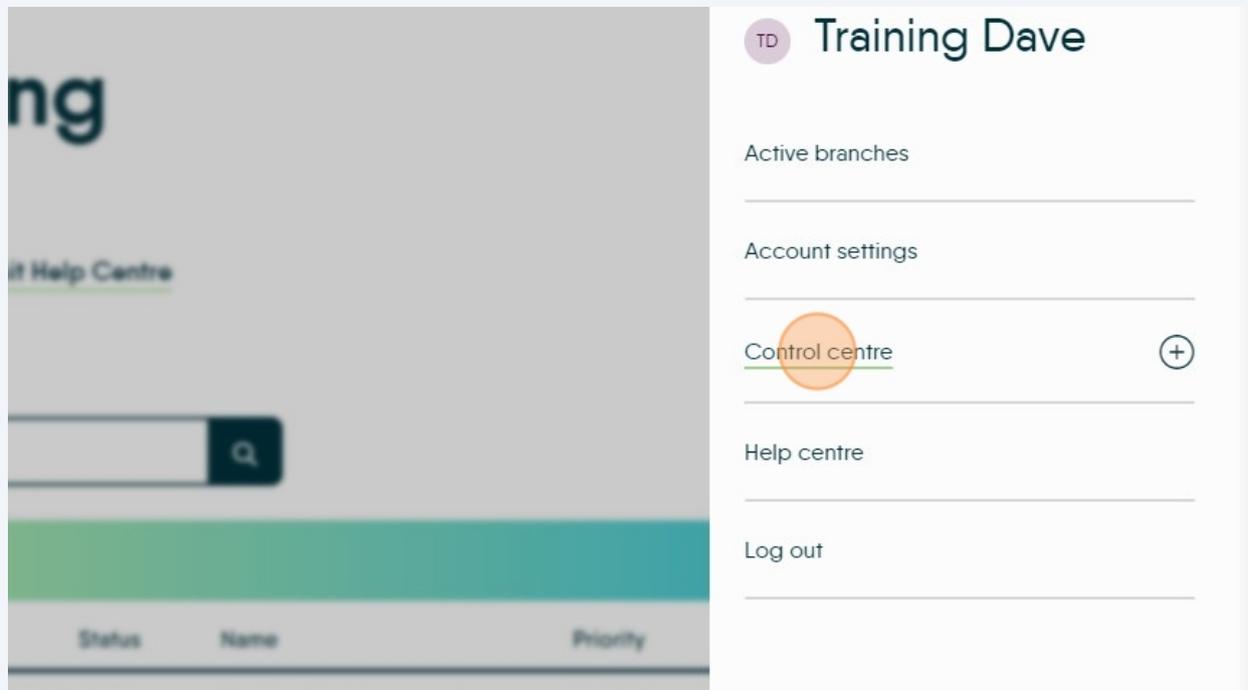
1

Navigate to <https://uat-feature.vtopenview.com/MyDay>

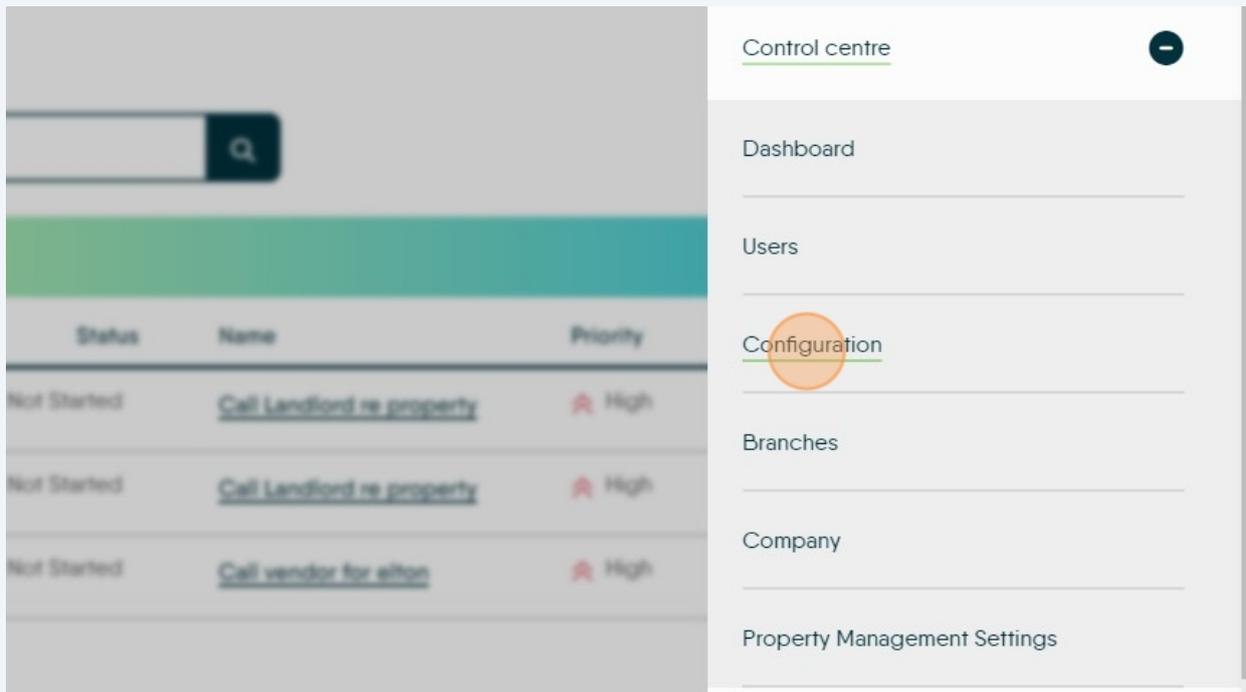
2 Click "My account"



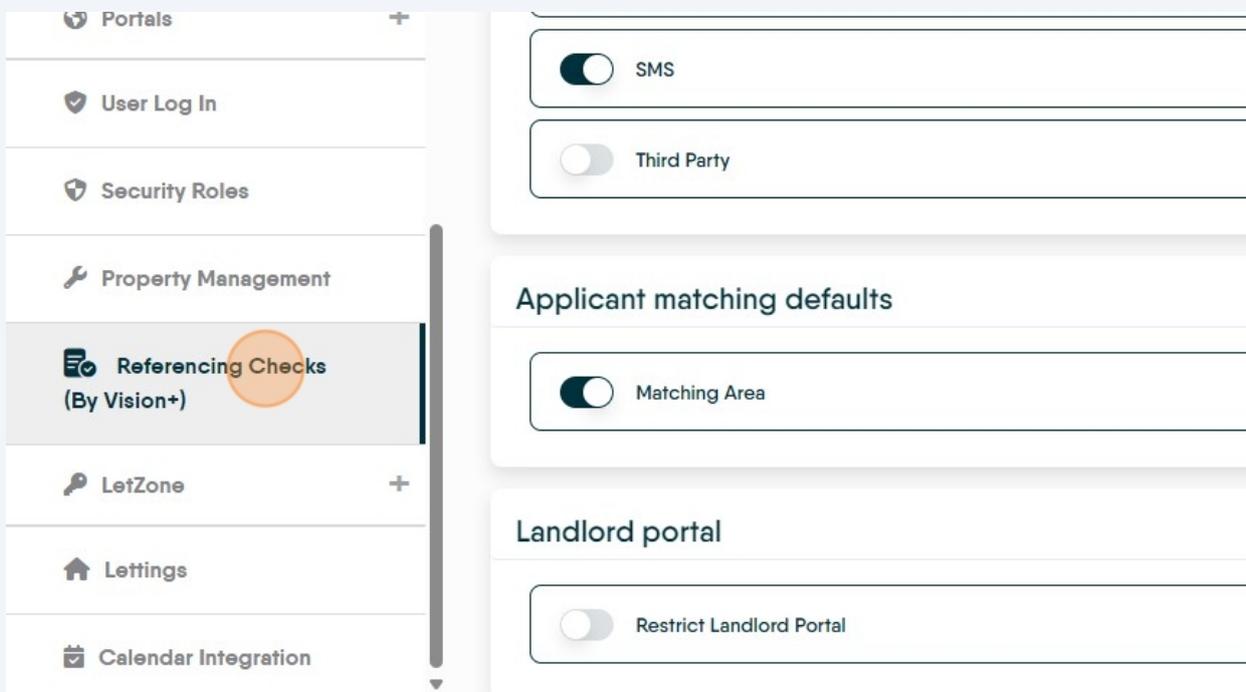
3 Click "Control centre"



4 Click "Configuration"



5 From the Configuration menu click "Referencing Checks(by Vision+)"



6 Click the "Client ID" field and enter your Client ID. (These are supplied by Vision+)

Control Centre > Configuration >

Vision+

General settings

Client ID: 2023000772_iamproperty

Client Secret: JXNhtmlAKewo8okPpl3RTsnOanitbhmF

Notification settings

Enable Notifications:

Send Notifications to Negotiator:

7 Click the "Client Secret" field and enter your code. (These are supplied by Vision+)

Client Secret: JXNhtmlAKewo8okPpl3RTsnOanitbhmF

Enable Vision+: Yes

Send Notifications to Negotiator:

Notification Email: Notification Email Address

8 Click "Enable Vision+"

The screenshot shows a settings panel with two sections. The top section contains a 'Client Secret' field with the value 'JXNhtmlAKewo8okPpl3RTsnOanitbhmF' and an 'Enable Vision+' toggle switch that is currently turned on. The bottom section contains a 'Send Notifications to Negotiator' toggle switch that is turned on and a 'Notification Email' field with the placeholder text 'Notification Email Address'.

9 Click here to enable notifications to be sent.

The screenshot shows a settings panel with two sections. The 'General settings' section contains a 'Client ID' field with the value '2023000772_iamproperty' and a 'Client Secret' field with the value 'JXNhtmlAKewo8okPpl3RTsnOanitbhmF'. The 'Notification settings' section contains an 'Enable Notifications' toggle switch that is currently turned on and a 'Send Notifications to Negotiator' toggle switch that is turned off.

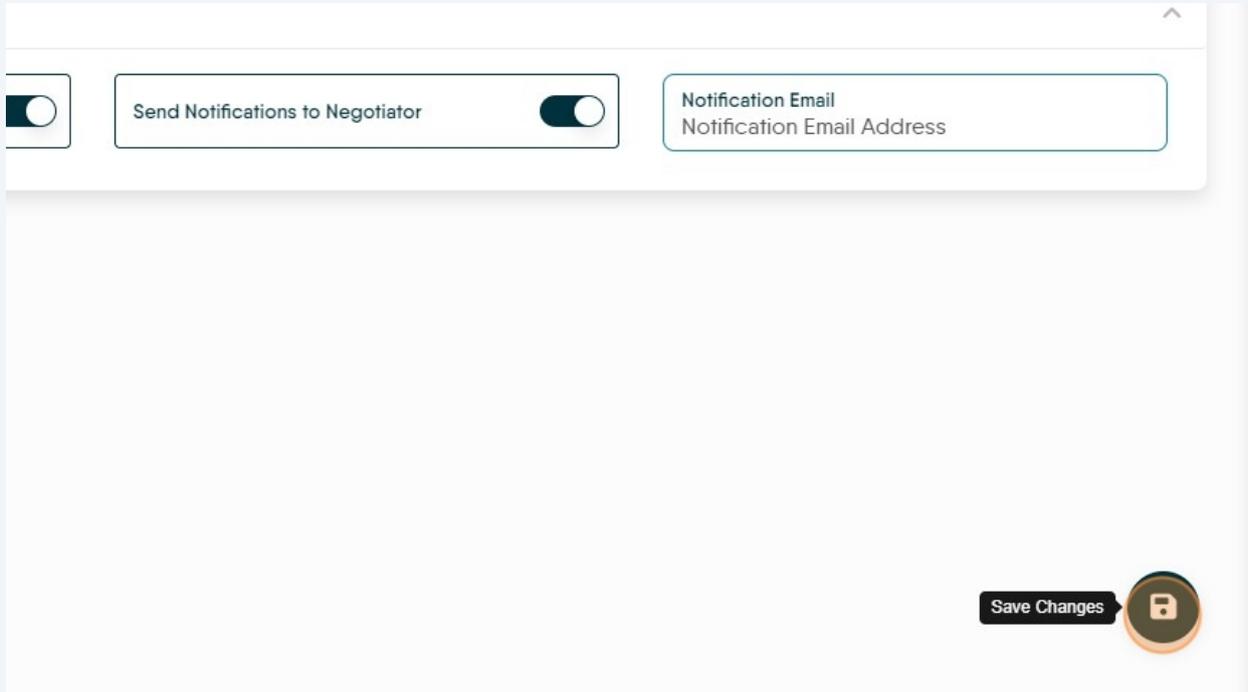
10 Click here and enable if you want the Property Negotiator to get the notifications.

The screenshot shows a settings interface with two rows of controls. The top row contains a red asterisk in a box, a 'Client Secret' field with the value 'JXNhtmlAKewo8okPpl3RTsnOanitbhmF' and a red asterisk, and an 'Enable Vision+' toggle switch set to 'Yes'. The bottom row contains a toggle switch set to 'Off', a 'Send Notifications to Negotiator' field with an orange circle highlighting the toggle, and a 'Notification Email' field with the placeholder text 'Notification Email Address'.

11 Click the "Notification Email" field.

This screenshot is identical to the one above, but with an orange circle highlighting the 'Notification Email' field, which contains the text 'Notification Email Address'.

12 Click here to save the settings.



The image shows a settings panel with a light blue border. At the top left, there is a small square icon with a white circle. To its right is a toggle switch labeled "Send Notifications to Negotiator", which is currently turned on. Further right is a text input field labeled "Notification Email" with the placeholder text "Notification Email Address". At the bottom right of the panel, there is a "Save Changes" button with a circular icon containing a save symbol.