

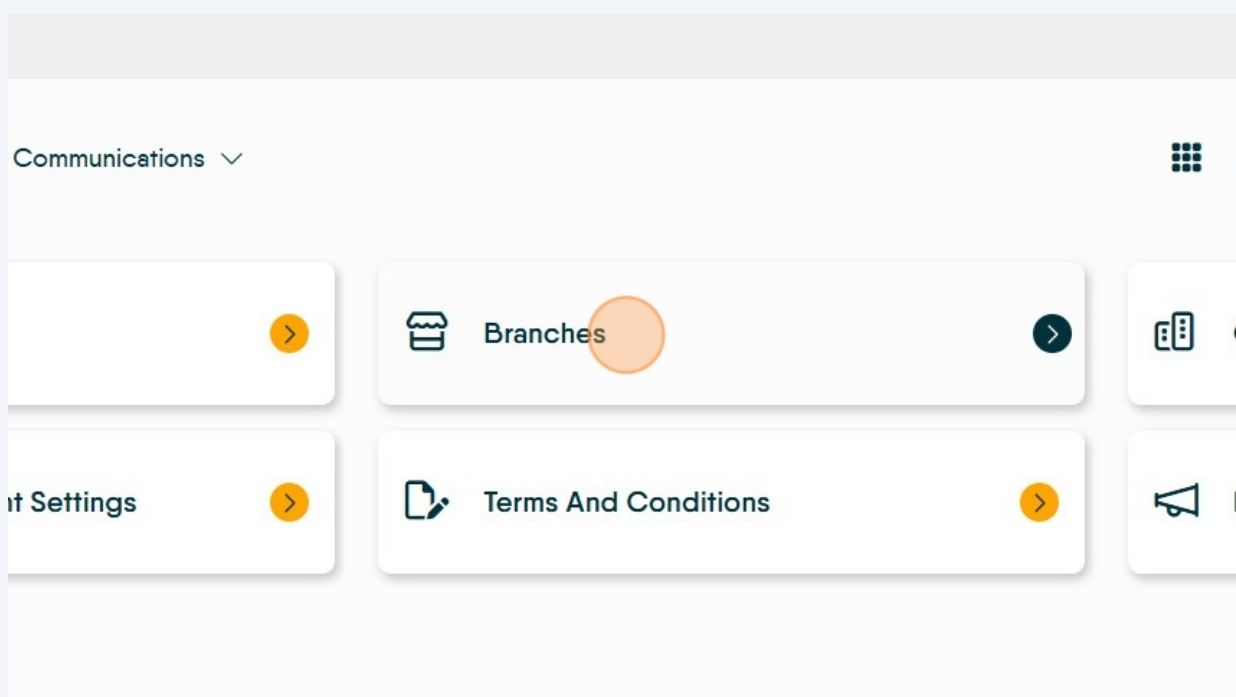
Adding the Reporting Dashboard module to Branches and Users



This guide outlines a clear process for adding the Reporting Dashboard module to specific branches and users within the CRM system. It ensures proper setup to enhance data analysis, support informed decision-making, and improve operational efficiency.

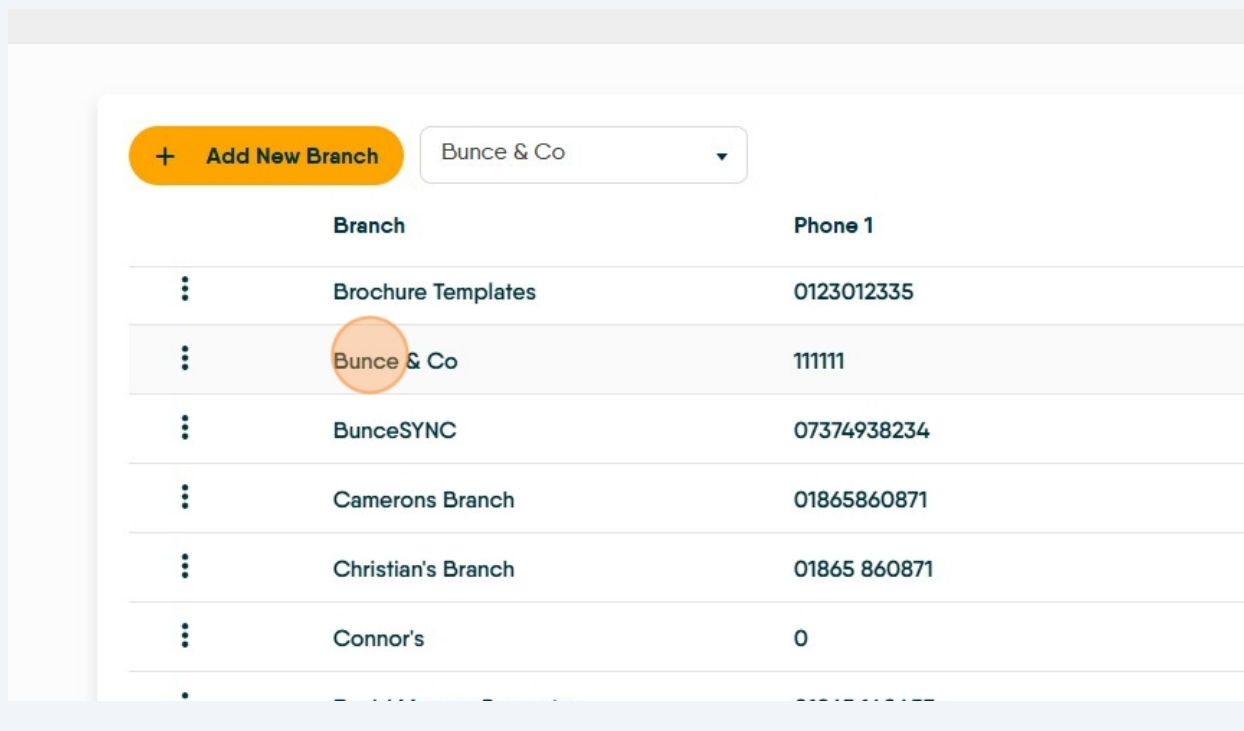
- 1 Navigate to <https://crm.iamproperty.com/Dashboards/ControlCentre>

- 2 Click into "Branches"



3

Click the branch you wish to add the Reporting Dashboard to. It will become highlighted in the list

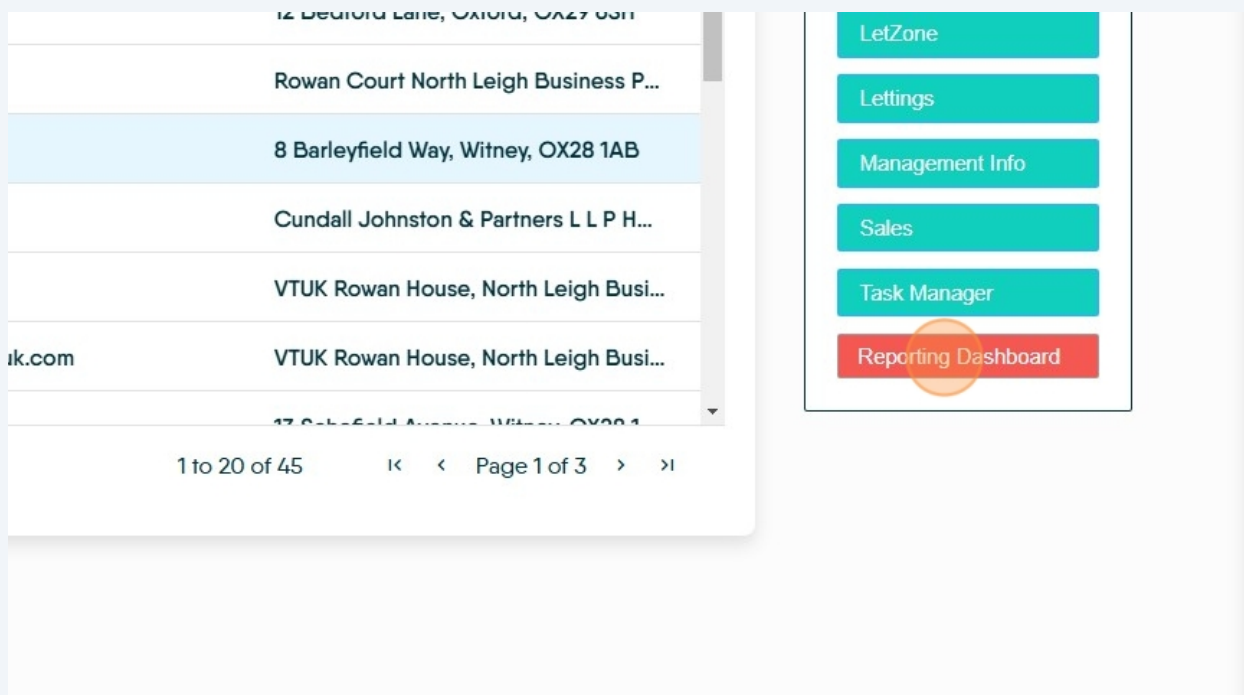


	Branch	Phone 1
⋮	Brochure Templates	0123012335
⋮	Bunce & Co	111111
⋮	BunceSYNC	07374938234
⋮	Camerons Branch	01865860871
⋮	Christian's Branch	01865 860871
⋮	Connor's	0

4

Click "Reporting Dashboard" in the module list. It will change from Red to Green.

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



12 Bedford Lane, Oxford, OX27 0SN	LetZone
Rowan Court North Leigh Business P...	Lettings
8 Barleyfield Way, Witney, OX28 1AB	Management Info
Cundall Johnston & Partners L L P H...	Sales
VTUK Rowan House, North Leigh Busi...	Task Manager
VTUK Rowan House, North Leigh Busi...	Reporting Dashboard
17 Oakfield Avenue, Witney, OX28 1...	

5 Return to "Control Centre"

The screenshot shows the 'iam property' logo on the left. To its right is a navigation bar with links: 'My day', 'Lettings' (with a dropdown arrow), 'Sales' (with a dropdown arrow), 'Accounts' (with a dropdown arrow), 'Reporting' (with a dropdown arrow), and a partially visible 'C'. Below the navigation bar is a breadcrumb trail: 'Control Centre' followed by a right-pointing chevron and 'Branches'. An orange circle highlights the 'Control Centre' link. Below the breadcrumb is a white box containing an orange button with a plus icon and the text 'Add New Branch', followed by a dropdown menu currently showing 'Bunce & Co'. Below this is a table with two columns: 'Branch' and 'Phone 1'. The table has two data rows. Each row starts with a vertical ellipsis icon. The first row shows '2019 Block' in the 'Branch' column. The second row shows 'Barringers Street' in the 'Branch' column and '01865 860870' in the 'Phone 1' column.

	Branch	Phone 1
⋮	2019 Block	
⋮	Barringers Street	01865 860870

6 Click into "Users"

The screenshot shows the 'iam property' logo on the left. To its right is a navigation bar with links: 'My day', 'Lettings' (with a dropdown arrow), 'Sales' (with a dropdown arrow), 'Accounts' (with a dropdown arrow), 'Reporting' (with a dropdown arrow), and a partially visible 'C'. Below the navigation bar is a grid of six white cards. The first card in the top row is labeled 'Users' with a person icon on the left, an orange circle in the middle, and a dark blue right-pointing chevron on the right. The second card in the top row is labeled 'Configuration' with a gear icon on the left. The third card in the middle row is labeled 'Modules' with a calendar icon on the left and an orange right-pointing chevron on the right. The fourth card in the middle row is labeled 'Property Management' with a folder and gear icon on the left. The fifth card in the bottom row is labeled 'Template Repository' with a document icon on the left and an orange right-pointing chevron on the right.

7 Uncheck the top listed user

Control Centre > Users

Clear filters

Company
Bunce & Co







Branch
All

Filter 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"/> Ollie Nolan	ollie.nolan@vtuk.com

8 Search for, or locate in the list, the user you wish to update

iamproperty

CRM

movebu



My

Search



Username

syncuser34

TB&Co

David Wiltron

Modules

Accounts

Client Portals

Control Centre

E-Sign

9

Tick the checkbox against the user you wish to give access to the Reporting Dashboard

Control Centre > Users

Clear filters

Company
Bunce & Co

Branch
All

Filter status
All (excluding Archived)

Contractors

+ Add New User

Register Portal Users



Name

Email



Sam Fender

tb+user2@vtuk.com

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Click "Reporting Dashboard" in the module list. It will change from Red to Green.

1 to 1 of 1



Page 1 of 1



LetZone

Lettings

Management Info

Property Management

Sales

Reporting Dashboard

Roles

Super Admin

Administrator

Negotiator

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It's recommended the user logs out and back in before navigating to the Reporting Dashboard, here:

<https://crm.iamproperty.com/Reporting/Sales-Reporting/>