

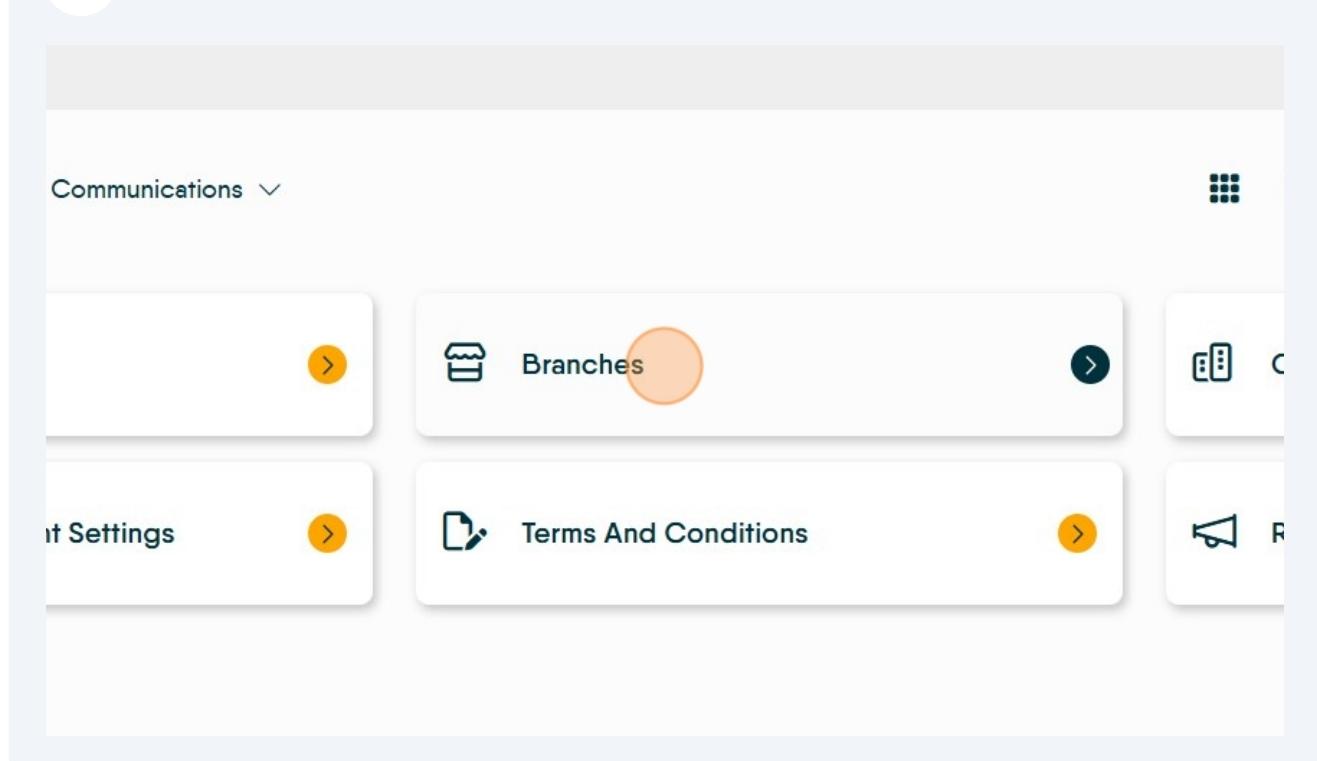
Adding the Reporting Dashboard module to Branches and Users



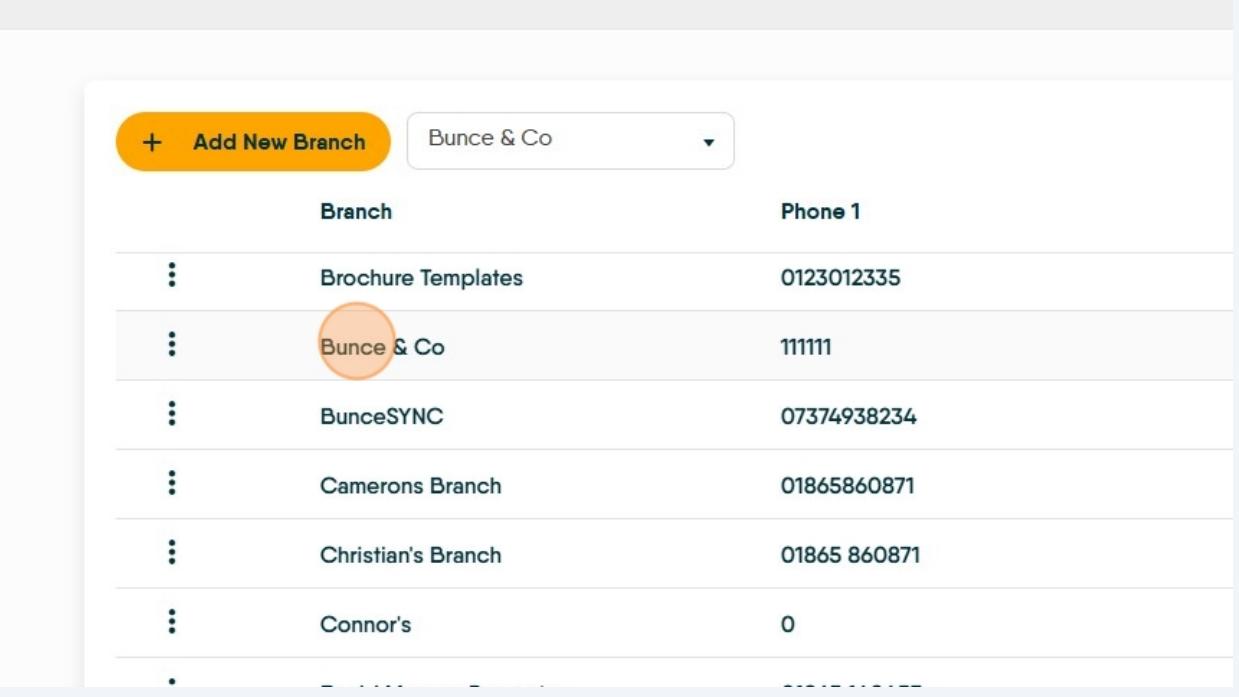
This guide outlines a clear process for adding the Reporting Dashboard module to specific branches and users within the CRM system. It ensures proper setup to enhance data analysis, support informed decision-making, and improve operational efficiency.

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

- 2 Click into "Branches"



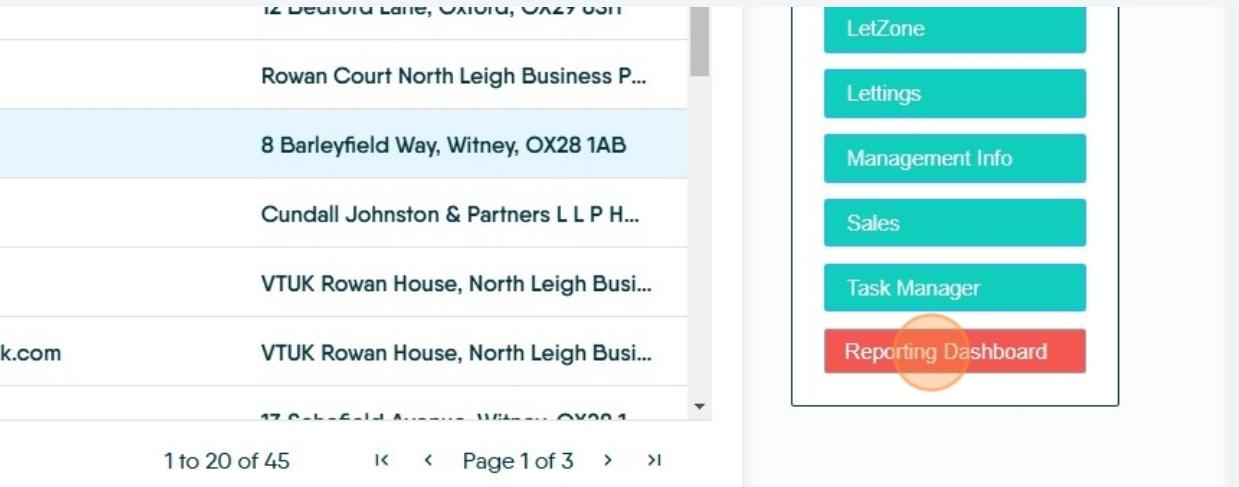
3 Click the branch you wish to add the Reporting Dashboard to. It will become highlighted in the list



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, Witney, OX27 0SH

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...

ik.com VTUK Rowan House, North Leigh Busi...

17 Colleagues Avenue, Witney, OX28 1

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LetZone

Lettings

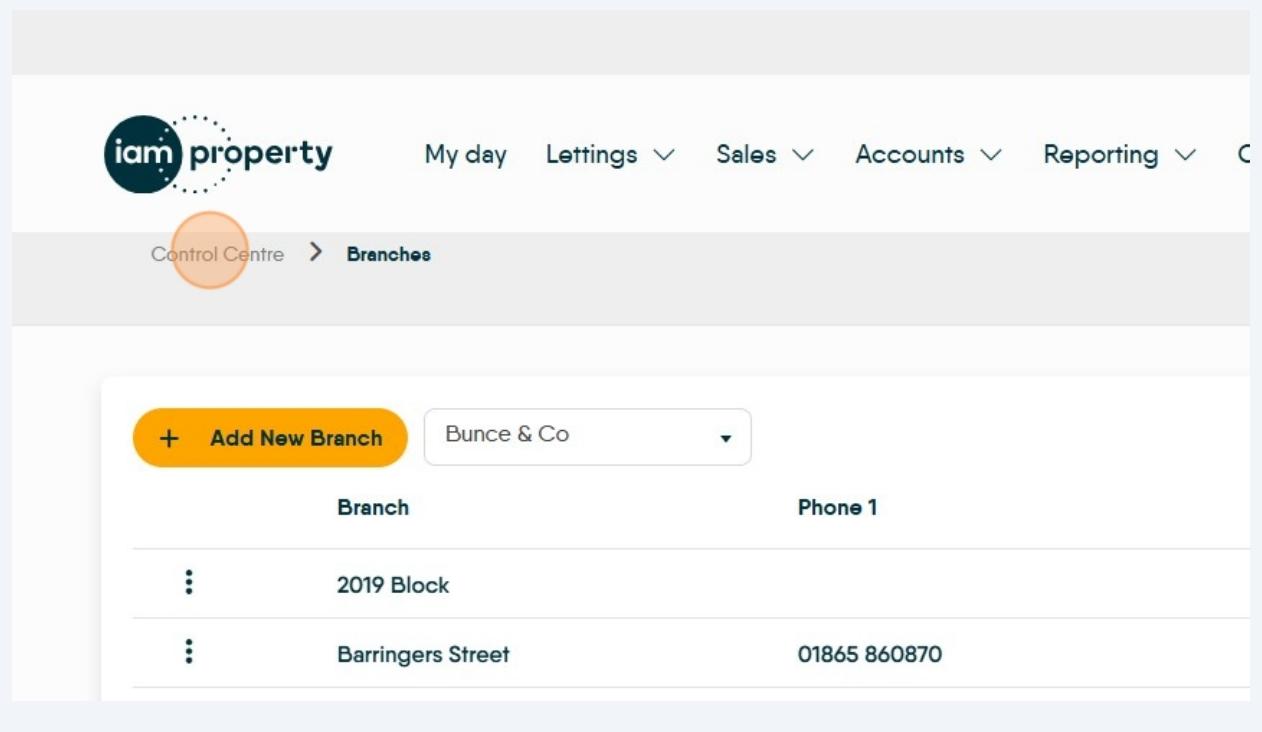
Management Info

Sales

Task Manager

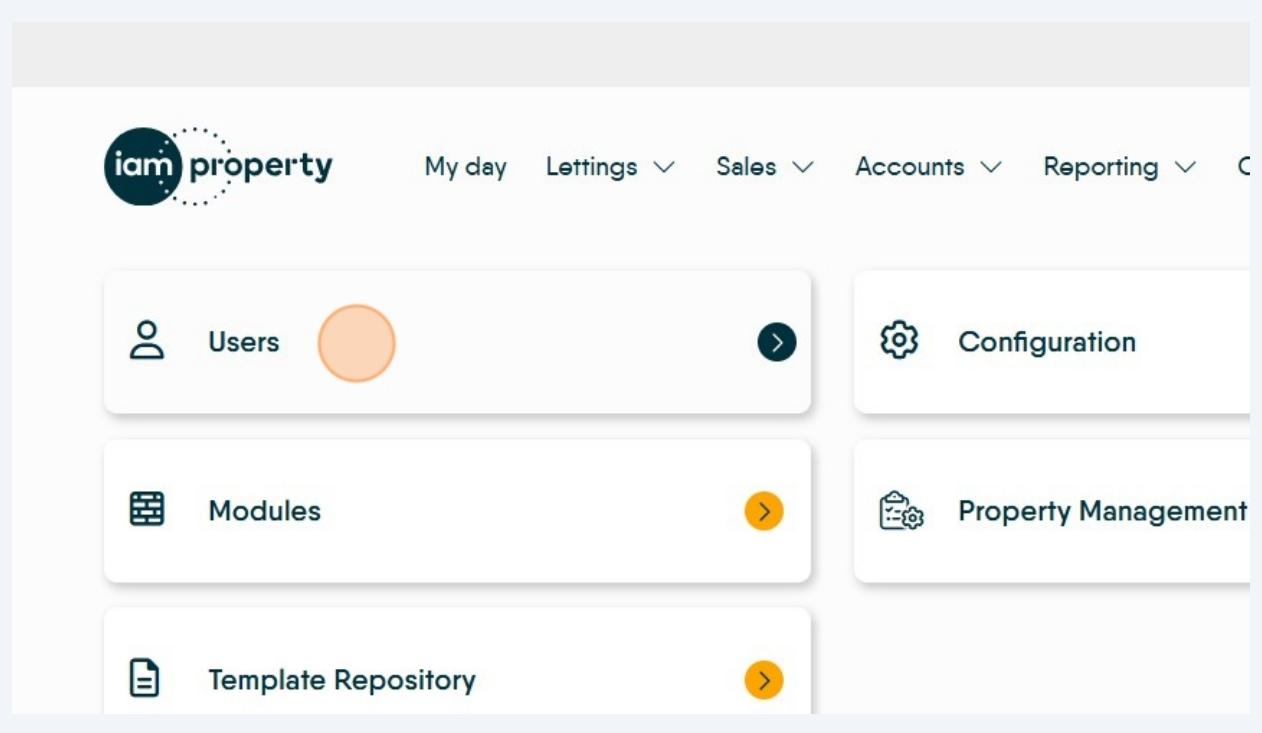
Reporting Dashboard

5 Return to "Control Centre"



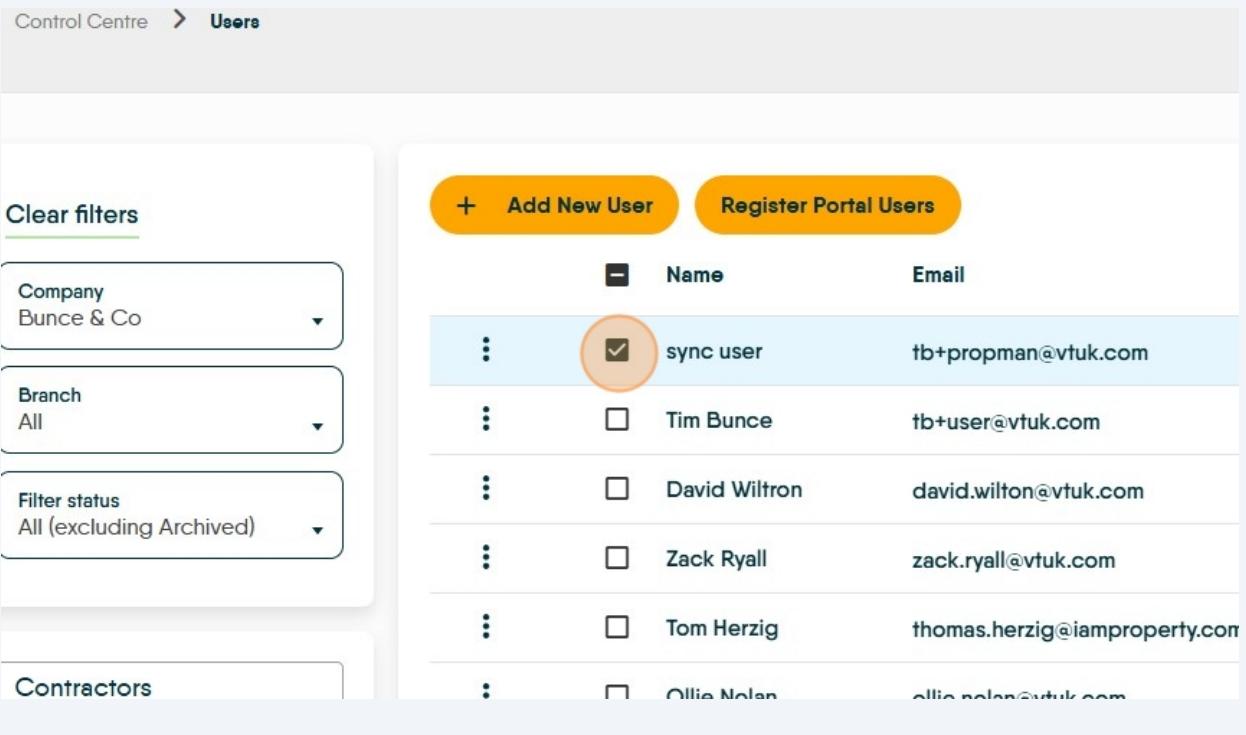
The screenshot shows the 'Control Centre' section of the iam property software. At the top, there is a navigation bar with the 'Control Centre' link highlighted with an orange circle. Below the navigation bar, there is a search bar with the text 'Bunce & Co' and a dropdown arrow. To the left of the search bar is a button labeled '+ Add New Branch'. The main content area displays a table with two rows of branch information. The first row shows 'Branch' as '2019 Block' and 'Phone 1' as '01865 860870'. The second row shows 'Branch' as 'Barrings Street' and 'Phone 1' as '01865 860870'. The table has a light gray background with thin horizontal and vertical grid lines.

6 Click into "Users"



The screenshot shows the main navigation menu of the iam property software. The menu items are arranged in a grid. The first item, 'Users', is highlighted with an orange circle. The other items are 'Configuration', 'Modules', 'Property Management', and 'Template Repository'. Each item has a small icon to its left and a right-pointing arrow to its right, indicating they are clickable links.

7 Uncheck the top listed user



Control Centre > **Users**

Clear filters

Company: Bunce & Co

Branch: All

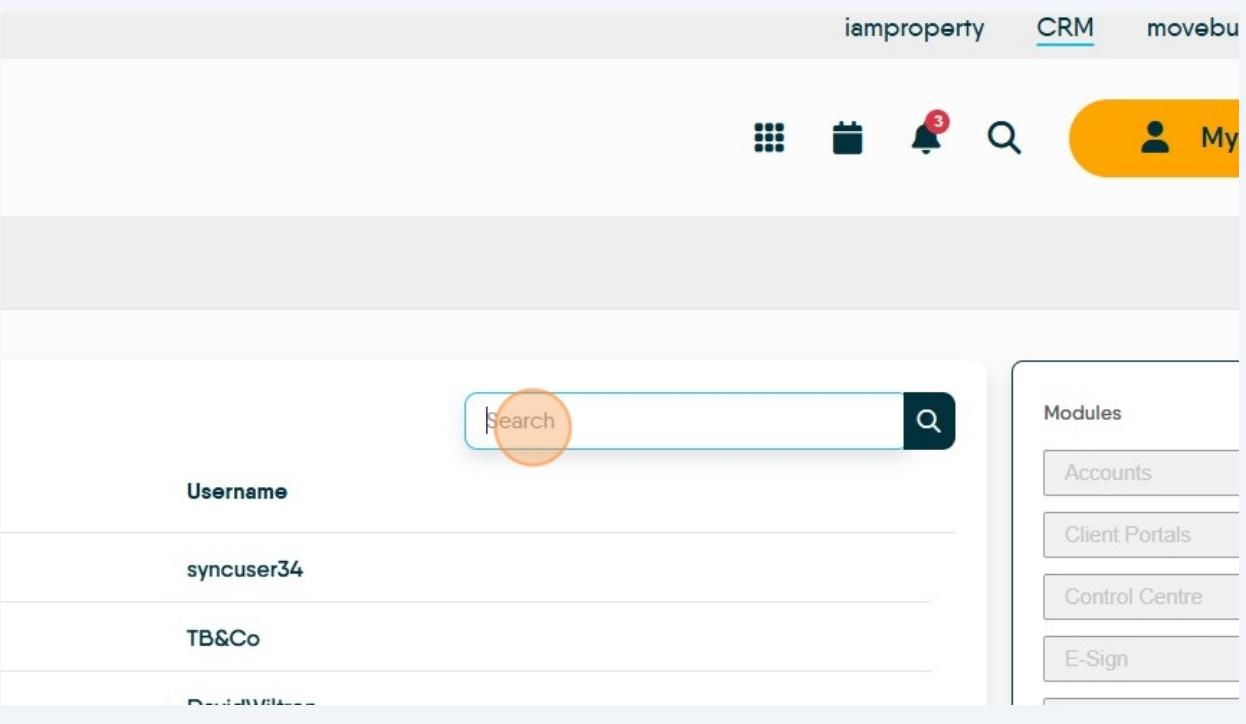
Filter status: All (excluding Archived)

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

Control Centre

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

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

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LetZone
Lettings
Management Info
Property Management
Sales
Reporting Dashboard

Roles

Super Admin
Administrator
Negotiator

11

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

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