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# Manage Active Branches in CRM

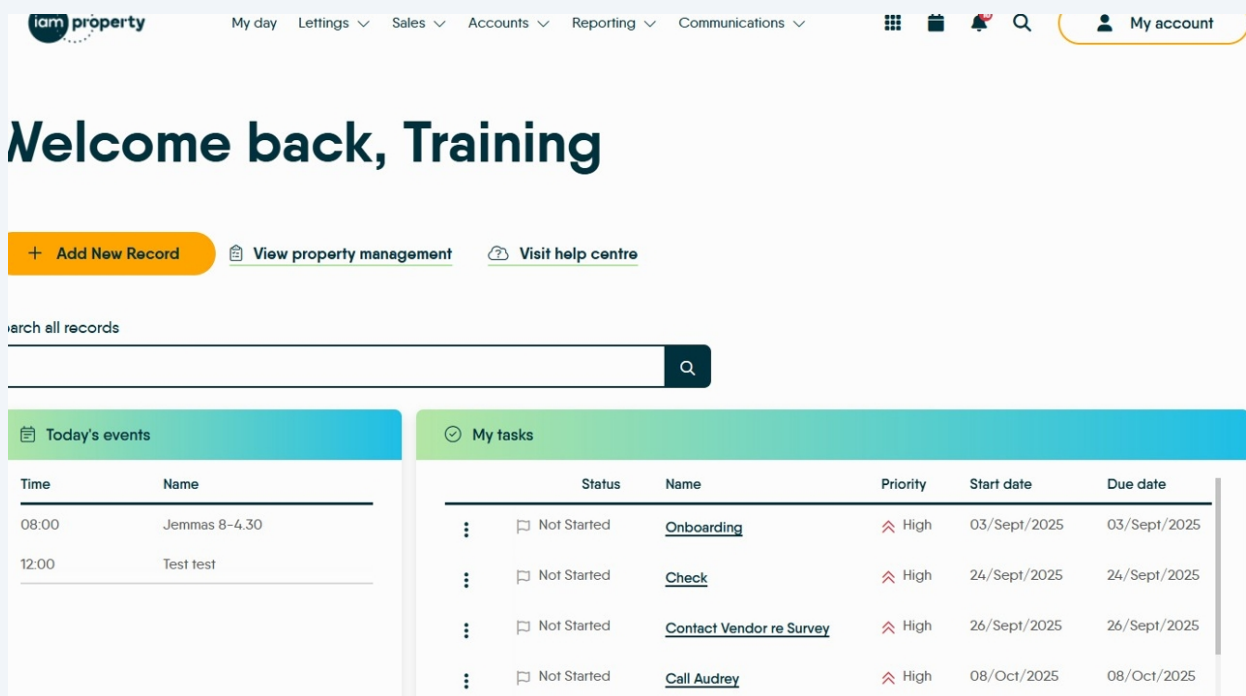


This guide provides a straightforward approach to managing active branches in your CRM system, ensuring you can efficiently oversee your operations.

By following the steps outlined, users can easily navigate the platform and make necessary adjustments to their branch settings. This is essential for maintaining accurate records and optimizing your workflow. Viewing this guide will enhance your CRM management skills and improve overall productivity.

 You will only need to do this once, if at all.

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

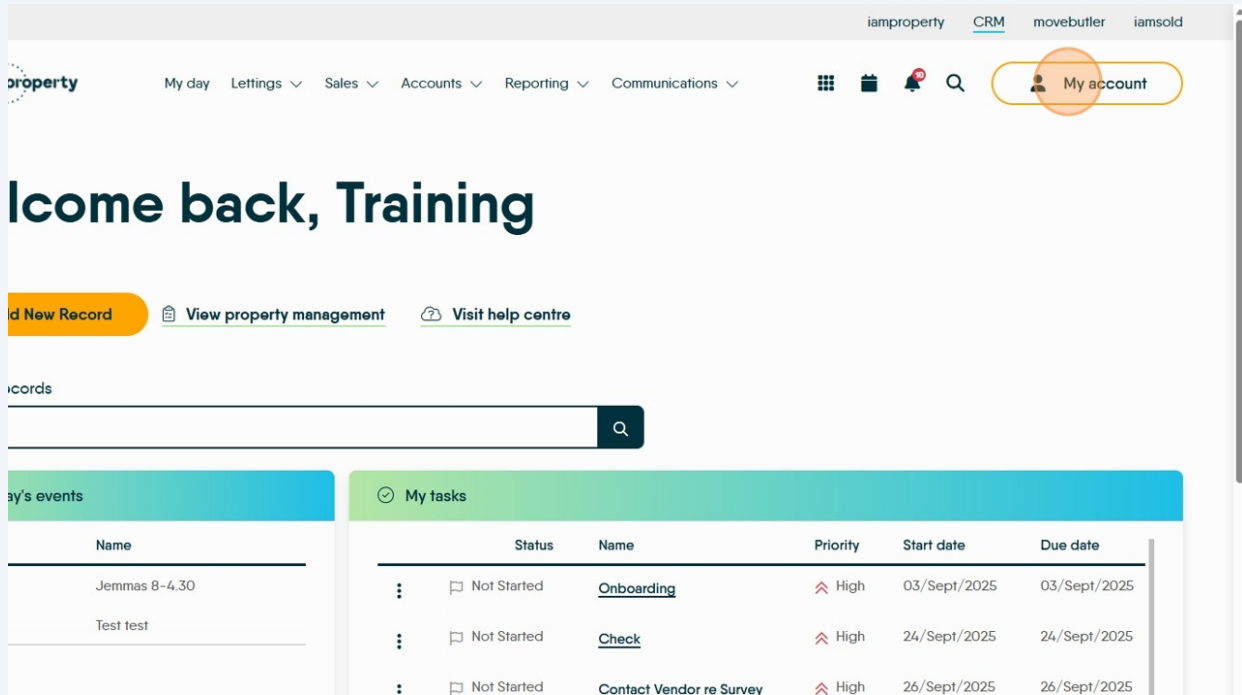


The screenshot shows the 'iam property' CRM Control Centre Users page. The header includes navigation links: My day, Lettings, Sales, Accounts, Reporting, and Communications. A search bar and 'My account' link are on the right. The main heading is 'Welcome back, Training'. Below this are three buttons: '+ Add New Record', 'View property management', and 'Visit help centre'. A search bar labeled 'Search all records' is present. The page is divided into two main sections: 'Today's events' and 'My tasks'.

| Time  | Name          |
|-------|---------------|
| 08:00 | Jemmas 8-4.30 |
| 12:00 | Test test     |

| Status      | Name                                     | Priority | Start date   | Due date     |
|-------------|------------------------------------------|----------|--------------|--------------|
| Not Started | <a href="#">Onboarding</a>               | High     | 03/Sept/2025 | 03/Sept/2025 |
| Not Started | <a href="#">Check</a>                    | High     | 24/Sept/2025 | 24/Sept/2025 |
| Not Started | <a href="#">Contact Vendor re Survey</a> | High     | 26/Sept/2025 | 26/Sept/2025 |
| Not Started | <a href="#">Call Audrey</a>              | High     | 08/Oct/2025  | 08/Oct/2025  |

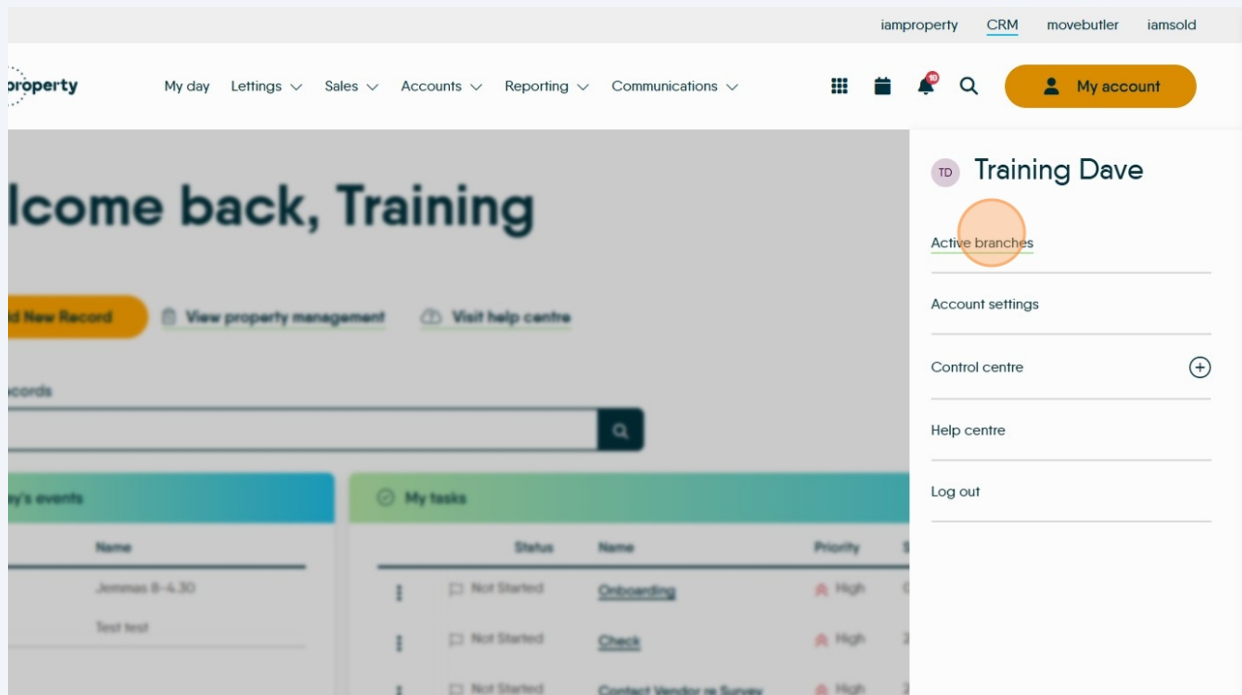
## 2 Click "My account"



The screenshot shows the CRM dashboard with the 'My account' button highlighted in the top right navigation bar. The dashboard includes a header with the 'property' logo and navigation links: My day, Lettings, Sales, Accounts, Reporting, and Communications. A search bar and a 'My account' button are also present. The main content area displays a welcome message 'I come back, Training' and a 'New Record' button. Below this, there are links for 'View property management' and 'Visit help centre'. A search bar for records is visible. The 'My tasks' section shows a table with tasks: Onboarding, Check, and Contact Vendor re Survey.

| Status      | Name                       | Priority | Start date   | Due date     |
|-------------|----------------------------|----------|--------------|--------------|
| Not Started | <a href="#">Onboarding</a> | High     | 03/Sept/2025 | 03/Sept/2025 |
| Not Started | <a href="#">Check</a>      | High     | 24/Sept/2025 | 24/Sept/2025 |
| Not Started | Contact Vendor re Survey   | High     | 26/Sept/2025 | 26/Sept/2025 |

## 3 From the menu select "Active branches"

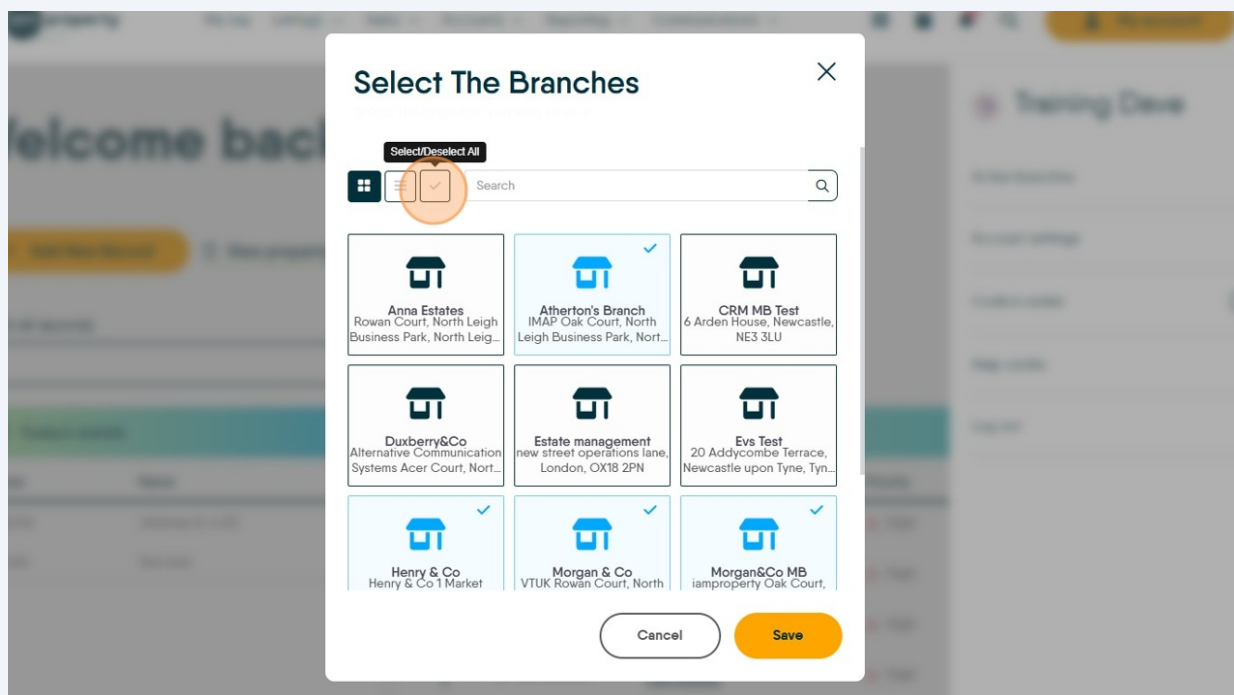


The screenshot shows the CRM dashboard with the 'Active branches' menu item highlighted in the right-hand sidebar. The sidebar includes a user profile for 'Training Dave' and a list of menu items: Active branches, Account settings, Control centre, Help centre, and Log out. The main content area is partially visible, showing the 'My tasks' table.

| Status      | Name                       | Priority |
|-------------|----------------------------|----------|
| Not Started | <a href="#">Onboarding</a> | High     |
| Not Started | <a href="#">Check</a>      | High     |
| Not Started | Contact Vendor re Survey   | High     |

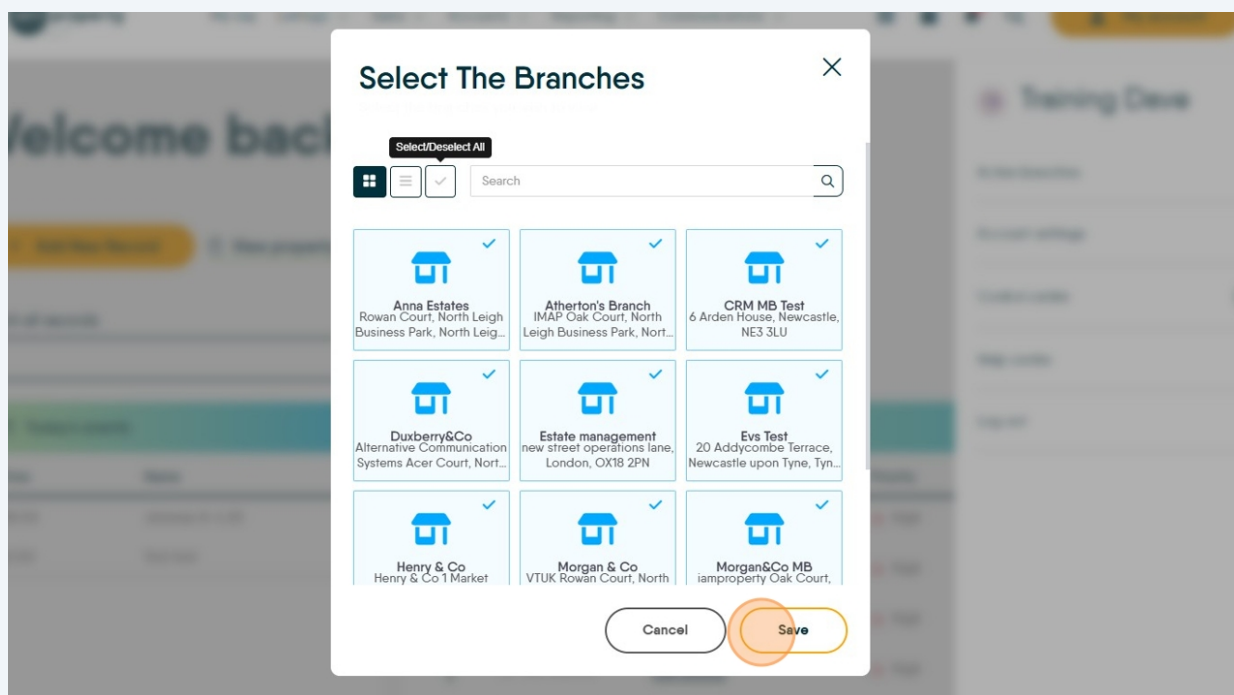
4

Click this checkbox to select ALL the branches. If you only require a selection, just click onto the branches you require, which will turn blue as in the image below.



5

Once the branches are selected click "Save"



**6**

This is all, or some of your branches, selected and available to use.