

Support Level Users - Navigating Dynamic Agent - Operations Dashboard



Learn how to manage and modify user access settings for staff members within your Dynamic Agent dashboard. This guide provides a clear walkthrough for adjusting operational roles and dashboard visibility for your team.



Alert! If you do not have sufficient user permissions it is possible you will not see the options to change user profiles.

This guide assumes you have full permissions to manage and configure Dynamic Agent.

There are some sections of this guide that are controlled by Dynamic Agent Support, these settings will be discussed as part of the Client Onboarding process and setup by Dynamic Agent Support.

1

Navigate to <https://dynamic-agent.co.uk/>

The screenshot displays the Dynamic Agent Operations Dashboard. The interface includes a sidebar with navigation options: Dashboard, ActivityPanel, Branches, Commission, Operations, and Add... The main content area is divided into several sections:

- Overall Companywide Standings:** This section features three circular gauges for Listings, Sales, and Exchanges. Each gauge shows Gross, Net, and Target values. For Listings, Gross is 0, Net is -13, and Target is 42. For Sales, Gross is 134, Net is 119, and Target is 48. For Exchanges, the values are not fully visible.
- Listings:** A table showing metrics: Total Fees (£0), Average Fee (£0), Average Price (£0), and Withdrawal Rate (100%).
- Sales:** A table showing metrics: Total Fees (£432,500), Average Fee (£3,228), Average Price (£256,011), and Falthrough Rate (11.2%).
- Exchanges:** A table showing metrics: Total Fees (£0), Average Fee (£0), Average Price (£0), and Falthrough Rate (100%).
- Key metrics at-a-glance:** A grid of 12 boxes displaying various metrics: Properties coming to the market (48), Properties with pending offers (26), Predicted to exchange this month (41), Valuations booked this month (7), New applicants last 7 days (0), Price changes this month (0), Valuations booked next 6 months (99), Viewings awaiting feedback last 14 days (0), Vendors with no recent contact (0), Valuations pending last 6 months (203), Applicants with no recent contact (1202), Properties put on notice (6), Valuations test last 12 months (99), Sales calls made this month (0), and Progress journal + 1 week (399).
- Top performers in the last 7 days:** A section at the bottom right showing performance metrics for Kyle Black, including 7 appraisals, 0 listings, 177 viewings, 134 sales, 0 exchanges, 0 legals, and 0 mortgages. The date is set to May 2026.

2

Click "**Operations**" in the side menu. This menu allows various items to be updated within Dynamic Agent such as adding Users, Branches etc.

The screenshot shows the Dynamic Agent dashboard. The left sidebar contains a menu with items: Dashboard, ActivityPanel, Branches, Commission, Operations (highlighted with a blue circle), and Add... The main content area is titled "Overall Companywide Standings" and is divided into sections for Listings, Sales, and Exchanges. The Listings section features a large circular gauge showing Gross (0), Net (-13), and Target (42). To its right are four data boxes: Total Fees (£0), Average Fee (£0), Average Price (£0), and Withdrawal Rate (100%). The Sales section features a large circular gauge showing Gross (134), Net (119), and Target (48). To its right are four data boxes: Total Fees (£432,500), Average Fee (£3,228), Average Price (£256,011), and Fallthrough Rate (11.2%). On the far right, a "Key metrics at-a-glance" sidebar lists: Properties coming to the market (48), Valuations booked month (7), Valuations booked 6 months (99), Valuations pending 6 months (203), and Valuations lost last 6 months (99).

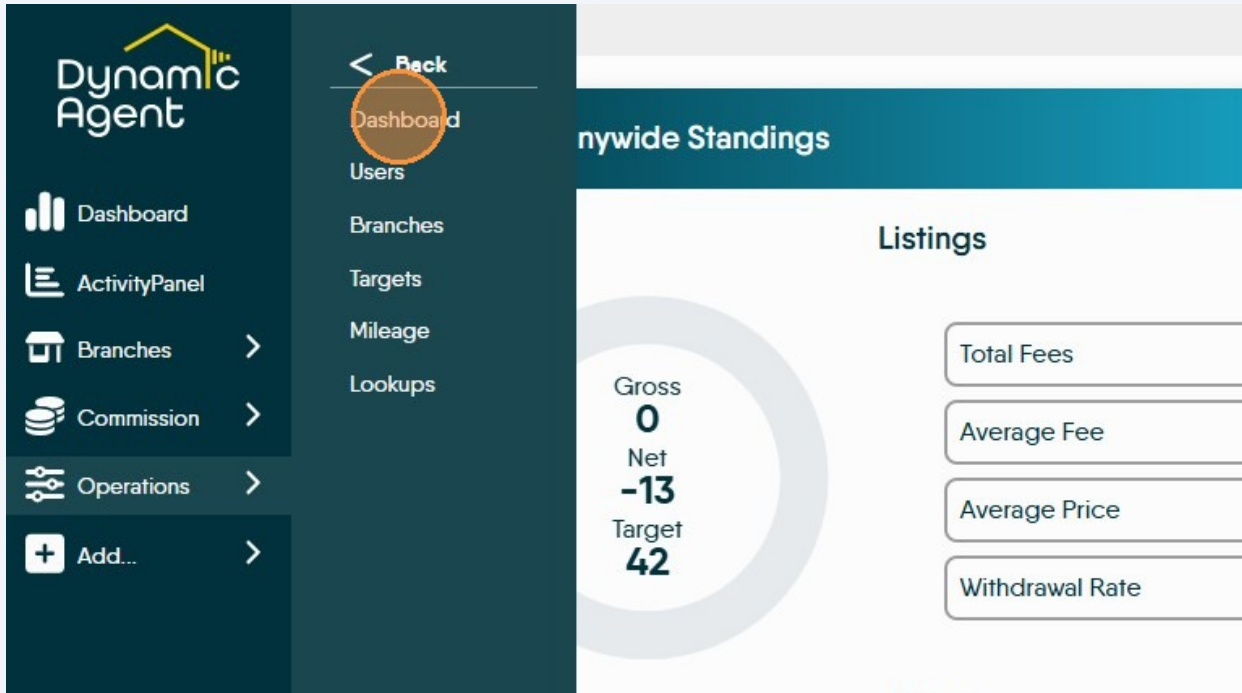
Operations Dashboard

3

Click "**Operations**"

This screenshot is similar to the previous one but highlights the "Operations" menu item in the left sidebar with a blue circle. The main content area shows the "Overall Companywide Standings" section, with the Listings and Sales gauges and their respective data boxes visible. The "Key metrics at-a-glance" sidebar is partially visible on the right.

4 Click "Dashboard"



5 Basic Config.

6

Click "**Basic Config**" in this screen the URL for where your properties are displayed can be added. Along with the URL of your CRM.

Negotiator Points Threshold is the point where staff start to earn commission. Points are set to be earned per activity e.g. Sale. Once this target is reached then commission is earned by the staff member.

Negotiator Applicant Management this allows a minimum/maximum number of Applicants a negotiator can handle, ensuring a high quality service. Outside of these thresholds the Negotiator will show red in the Applicants list.

Mileage form configuration for employees claiming mileage for either a personal or business use vehicle and are set by you. Advisory figures are available from HMRC. The threshold is the point the mileage rate drops, for example using a personal car for business use after 10000 miles the rate drops from 45p per mile to 25p per mile.

The screenshot displays the 'Agent' software configuration interface. On the left is a dark sidebar with navigation options: Dashboard, ActivityPanel, Branches, Commission, Operations, and Add... The main content area is divided into three tabs: 'Basic configuration', 'Journal configuration', and 'Modules and features'. The 'Basic configuration' tab is active and contains the following sections:

- Basic configuration**: General configuration options that will rarely need to be changed. Includes a text input field for 'Negotiator Points Threshold*'. The value '20' is visible in the input field.
- Negotiator applicant management**: Specify the minimum and maximum thresholds for number of applicants managed per negotiator. Outside of these thresholds, the negotiator will appear red in the list. Includes two input fields: 'Minimum*' with the value '20' and 'Maximum*' with the value '100'.
- Mileage form configuration**: Includes three input fields for 'Mileage Pence up to threshold*', 'Mileage Pence over threshold*', and 'Mileage Threshold*'. All fields are currently empty.

A yellow 'Save' button is located at the bottom right of the 'Basic configuration' section.

7

"Journal Configuration" allows you to set which journal types trigger the "last contacted" date for the Applicant, Vendor/Property and Progressions Journals. To do this, specify a comma separated list of Journal IDs (there is a list available from the screen). To trigger this on any journal type, enter "all".

Journal configuration

Journal types to trigger contact updates

Pick which journal types that trigger the "last contacted" date for the below entities. To this, specify a comma separated list of Journal IDs (click [here](#) to see a list of possibilities). To trigger this on any journal type, enter "all".

Applicant Journal IDs* Property Journal IDs (Vendor)*

Sales Progress Journal IDs*

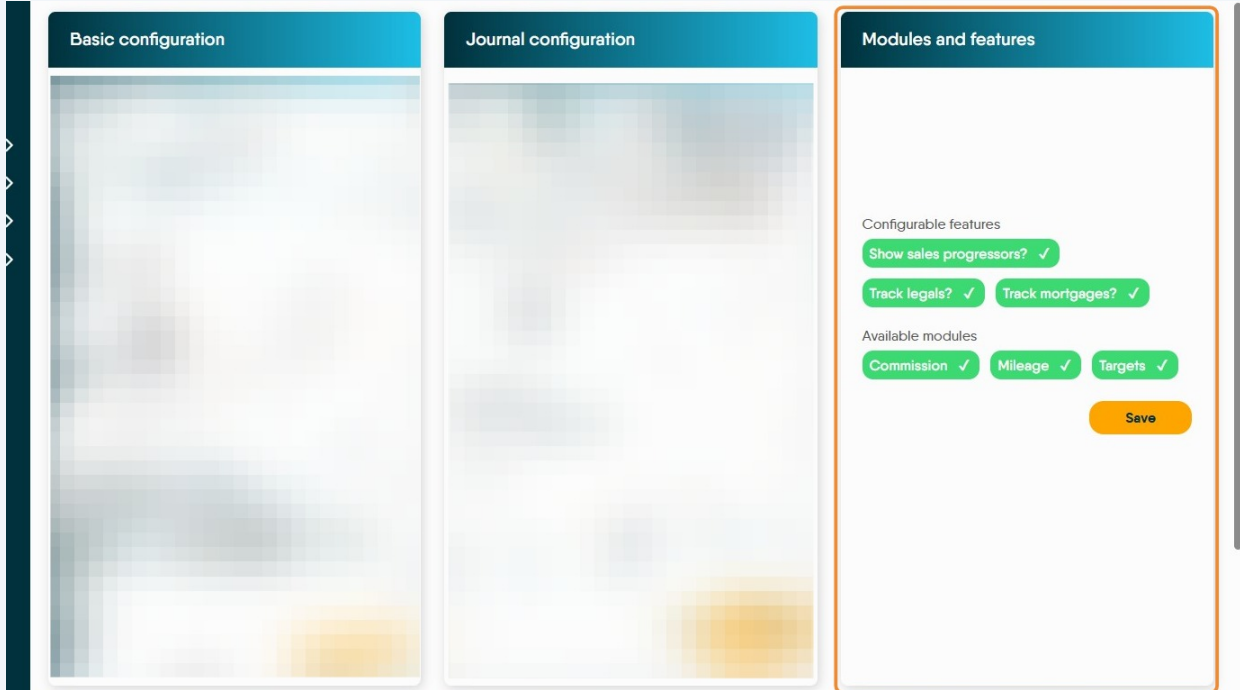
Contact threshold highlighting (in weeks)

Applicants* Vendors* Sales Progress*

8

N.B. This section is only available to users with Support Level Access

"Modules and features" this allows features to be not shown if they are not relevant, for example if you do not track Mortgage this can be deselected. Also allows other modules e.g. Commissions if you don't pay or use Dynamic Agent to track commissions.



9

The "**Mobile Logo**", "**Desktop Logo**" and "**Login Photo**" allow you to add your company logo for the web and mobile Dynamic Agent logins. Also add a personal image for the login.

Mobile Logo

The mobile logo is displayed on a white background, top centre, on screen sizes below 960px. Use a standard PNG logo.

Drag and drop, or tap here

Desktop Logo

The desktop logo is shown at the top left hand corner on screen sizes of 960px and above. This needs to be a transparent PNG, ideally the white variant of the logo.

Drag and drop, or tap here

Login Photo

You may choose an appropriate photo to override the default "river" photo shown on the login and forgot password screens. This enables a degree of personalisation.

Drag and drop, or tap here

Michael Watson
150 Avon Crescent, Overthorpe
Soleo Banbury 30th Mar at 9:38am

0 listings 134 sales 0 exchanges 1 legals 0 mortgages May 2026

Users



Alert! This section is only available to users with Support Level Access or above.

The **Config Dashboard (Permissions), Config-Users & Config Branches** will only be available to support level user access. These settings will be determined as part of Client Onboarding, then set by Dynamic support. If the client then needs settings changes, they will put in a support request.

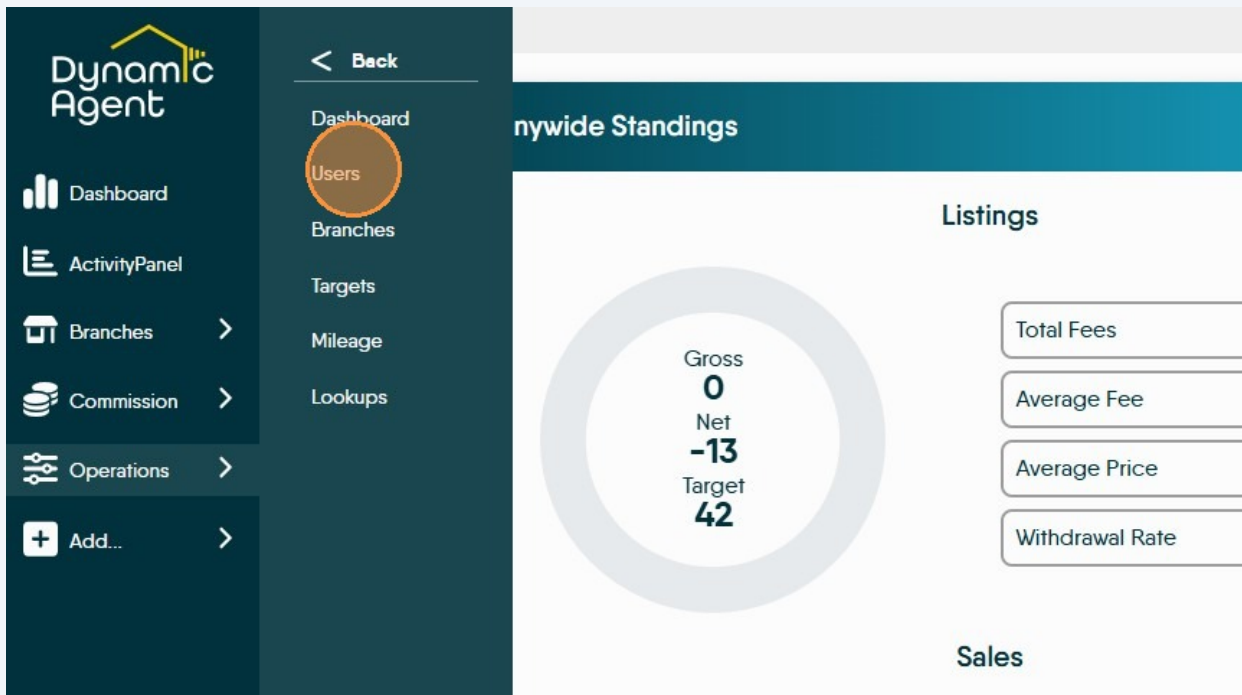
The Config types of Targets, Mileage and Lookups will be available for client use for staff with the appropriate permissions.

10

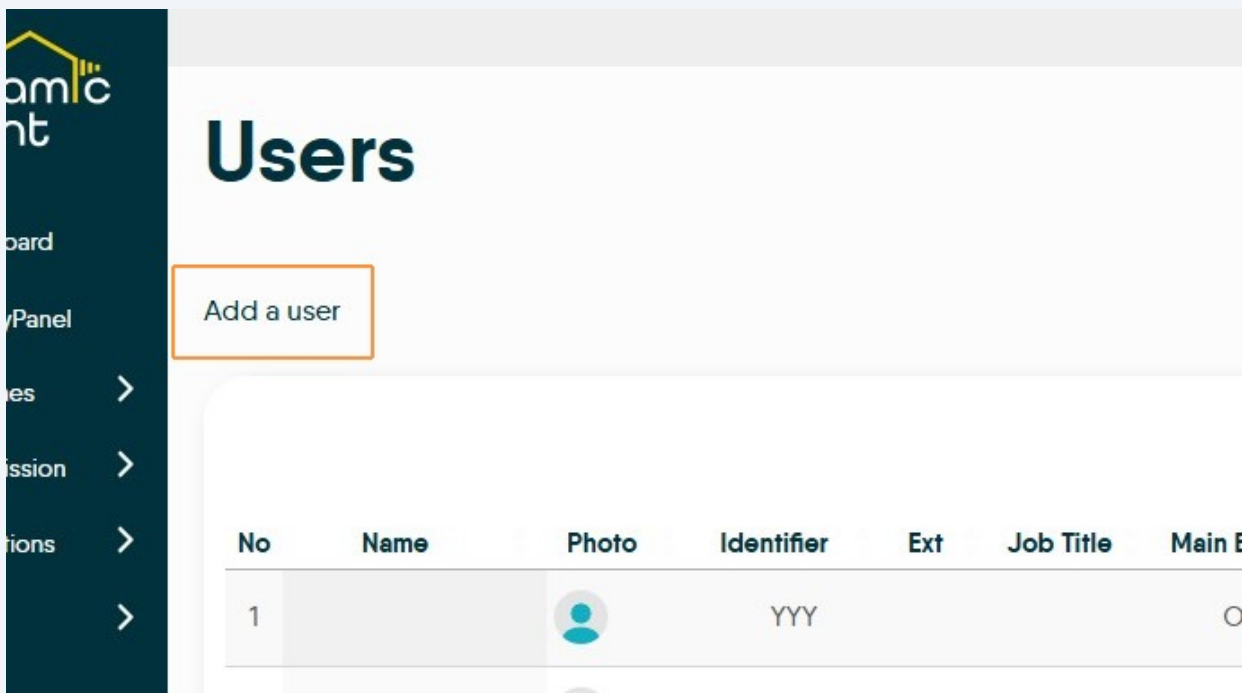
ONLY Available to 'Support' Level users.

The **Users** screen allows all users of Dynamic Agent to be managed, permissions granted and removed and new users added to the system.

11 Select "Users".



12 Once in the Users screen to add a new user to Dynamic Agent click "Add a user" you will be diverted to a screen where a new user can be added.



13 User Profile

14 Find the User whose details you want to update. Click on the users name e.g. "Jake Martin"

ID	First Name	Initials	Branch	Region	Role	Other Roles	Other Regions	Actions
19	Fatima Lloyd	FLL	Warwick	-	Valuer	-	-	+ Actions
20	Grace Walton	GWA	Didcot	-	Negotiator	-	-	+ Actions
21	Henry Greenwood	HGR	Oxford	-	Negotiator	-	-	+ Actions
22	Jack Bradshaw	JBR	Banbury	-	Negotiator	-	-	+ Actions
23	Jake Martin	JMA	Aylesbury	All branches	Director	-	-	+ Actions
24	Jake Martin	JMA	Aylesbury	All branches	Director	-	-	+ Actions
25	James Burton	JBU	Banbury	All branches	Director	-	-	+ Actions
26	Jasmine Wells	JWE	Aylesbury	-	Negotiator	-	-	+ Actions
27	Jordan Morley	JMO	Oxford	All branches	Director	-	-	+ Actions
28	Julia Dickinson	JDI	Didcot	-	Valuer	-	-	+ Actions
29	Kyle Black	KBL	Didcot	-	Negotiator	-	-	+ Actions
30	Kyle Wood	KWO	Aylesbury	-	Valuer	-	-	+ Actions
31	Lucy Gilbert	LGI	Didcot	-	Negotiator	-	-	+ Actions
32	Matthew Rowe	MRO	Banbury	-	Negotiator	-	-	+ Actions
33	Michael Tucker	MTU	Oxford	-	Valuer	-	-	+ Actions

Kyle Black 65 Cherrwood Avenue, Steventon
7 appraisals 0 listings 177 viewings 134 sales 0 exchanges 0 legals 0 mortgages May 2026

15 The "Actions" option allows the main branch of a user to be changed easily and quickly.

Enter a search term

Ext	Job Title	Main Branch	Extra Branches	User Level	Extra Privileges	Last Activity	
		Oxford	All branches	Administrator	-	-	+ Actions
		Warwick	All branches	Director	-	-	+ Actions
		Oxford	-	Negotiator	-	-	+ Actions
		Warwick	-	Negotiator	-	-	+ Actions
		Banbury	-	Valuer	-	-	+ Actions
		Aylesbury	-	Negotiator	-	-	+ Actions
		Banbury	-	Manager	-	-	+ Actions

Enter a search term

Ext	Job Title	Main Branch	Extra Branches	User Level	Extra Privileges	Last Activity	
		Oxford	All branches	Administrator	-	-	+ Actions
				Change main branch	Warwick		Hide
		Oxford	-	Negotiator	-	-	+ Actions
		Warwick	-	Negotiator	-	-	+ Actions
		Banbury	-	Valuer	-	-	+ Actions
		Aylesbury	-	Negotiator	-	-	+ Actions
		Banbury	-	Manager	-	-	+ Actions

16

Clicking onto the users name will take you to this screen. **User Profile**. In this section you can add a photo to the users record.

User Profile

You can update a user's core data, assign branches, privileges etc.

Profile Photo

Drag and drop, or tap here

Password

Login Type* Login Redirect*

Password Confirm Password

Strength Default Sector*

Save

Email Signature

Basic information

First Name* Last Name*

Short Name* Email*

Role* Job Title

CRM User ID Date Joined

Phone Extension Number Company Gr

Branches

Main Branch* Extra Branch

Role & Privileges

17

By clicking into the **Login Redirect** field you can select where the user id directed to on login. Dashboard, Activity Panel or Branch Panel

Profile Photo

Drag and drop, or tap here

Password

Login Type* Login Redirect*

Password Confirm Password

Strength Default Sector*

Short Name*

Role*

CRM User ID

Phone Extension Number

Branches

Main Branch*

18

The user can update their **Password** by clicking the "Password" field and also ensure the passwords strength via the 'strength' indicator.

The screenshot shows a user profile update form. On the left, a dark sidebar contains navigation items: 'Branches', 'Permissions', 'Operations', and '...'. The main content area is divided into two columns. The left column is titled 'Profile Photo' and contains a circular profile picture placeholder with the text 'Drag and drop, or tap here'. Below this is the 'Password' section, which includes 'Login Type*' (Standard) and 'Login Redirect*' (Dashboard) dropdowns. The 'Password' and 'Confirm Password' input fields are highlighted with an orange border. Below these is a 'Strength' indicator showing 'Weak' and a 'Default Sector*' dropdown set to 'Sales'. A yellow 'Save' button is at the bottom of this section. The right column contains fields for 'Short Name*', 'Role*' (Director), 'CRM User ID', 'Phone Extension Number', and 'Branches' (Main Branch* set to Aylesbury).

The screenshot shows a user profile update form with two main sections: 'User Profile' and 'Basic information'. The 'User Profile' section on the left is identical to the previous screenshot, but the 'Strength' indicator now shows 'Weak' in a red box. The 'Basic information' section on the right contains the following fields: 'First Name*' (Jake), 'Last Name*' (Martin), 'Short Name*', 'Email*' (jakemartin@example.com), 'Role*' (Manager), 'Job Title' (Director), 'CRM User ID', 'Date Joined' (dd/mm/yyyy), 'Phone Extension Number', and 'Company Group Code' (Choose...). Below these is the 'Branches' section with 'Main Branch*' (Aylesbury) and 'Extra Branches' (Oxford, Banbury, Warwick, Didcot). At the bottom, there is a 'Role & Privileges' section.

19

User 'Basic Information'

20

"Basic Information" screen allows data to be added or updated in a User record.

Add/Edit the users First Name, Last Name and Email. A 'Short Name' is a required field. Choose the users 'Role' from the drop down menu

The screenshot shows the 'Basic information' section of the 'User Profile' screen. The 'Role' dropdown menu is highlighted with an orange box, showing 'Administrator' selected. The form includes fields for First Name (David), Last Name (Morgan), Short Name (Dave), Email (david.morgan@iamproperty.com), and CRM User ID (david.morgan@iamproperty.com). There are also sections for Branches (Main Branch: Oxford, Extra Branches: Banbury, Warwick, Aylesbury, Didcot) and Role & Privileges (Add exchange, Claim/add business for anyone in your branch, Claim/add negotiator business, Claim/add sales progressor business, Claim/add valuer business, Delete branch business, Delete business companywide, Edit branch business, Edit business companywide, View fees).

21

Roles controls the information users can see on screen e.g. Administrator will have more access than a Negotiator.

The screenshot shows the 'Basic information' section of the 'User Profile' screen. The 'Role' dropdown menu is highlighted with an orange box, showing a list of roles including Administrator, Director, Company Admin, Manager, Valuer, Negotiator, Viewings Co-ordinator, Basic User, Sales Progressor, iamproperty Sales, and iamproperty Support. The form includes fields for First Name (David), Last Name (Morgan), Short Name (Dave), Email (david.morgan@iamproperty.com), and CRM User ID (david.morgan@iamproperty.com). There are also sections for Branches (Main Branch: Oxford, Extra Branches: Banbury, Warwick, Aylesbury, Didcot) and Role & Privileges (Add exchange, Claim/add business for anyone in your branch, Claim/add negotiator business, Claim/add sales progressor business, Claim/add valuer business, Delete branch business, Delete business companywide, Edit branch business, Edit business companywide, View fees).

22

Branches. Select the users 'Main Branch' from the drop down menu. If the user works across multiple branches, select those in the 'Extra Branches' section.

User Profile

You can update a user's core data, assign branches, privileges etc.

Profile Photo

Drag and drop, or tap here

Password

Login Type* Login Redirect*

Standard Dashboard

Password Confirm Password

Strength Default Sector*

Sales

Save

Basic information

First Name* Last Name*

David Morgan

Short Name* Email*

Dave david.morgan@iamproperty.com

Role* CRM User ID

Administrator david.morgan@iamproperty.com

Branches

Main Branch*

Oxford

Extra Branches

Banbury - Warwick - Aylesbury -

Didcot -

Role & Privileges

Privileges concerned with adding business

Add exchange ✓ Claim/add business for anyone in your branch ✓ Claim/add negotiator business ✓

Claim/add sales progressor business ✓ Claim/add valuer business ✓ Delete branch business ✓

Delete business companywide ✓ Edit branch business ✓ Edit business companywide ✓ View fees ✓

23

Roles and Privileges. This section allows user permissions to be granted/removed as required. These are enabled by clicking on the options and clicking 'Save'

Click "View operations dashboard✓"

Click "View mortgage dashboard-

Privileges concerned with adding business

- Add exchange ✓
- Claim/add business for anyone in your branch ✓
- Claim/add negotiator business ✓
- Claim/add sales progressor business ✓
- Claim/add valuer business ✓
- Delete branch business ✓
- Delete business companywide ✓
- Edit branch business ✓
- Edit business companywide ✓
- View fees ✓

Commission-based privileges

- Can claim mileage ✓
- Review branch commission ✓
- Review figures/commission companywide ✓
- Set up commission structure ✓
- Set up mileage forms ✓
- Set up targets companywide ✓
- Set up targets for own branch ✓
- User is not included in commission structure ✓
- User is not included in targets ✓
- View staff commission sheet ✓
- View staff commission totals ✓

Dashboard access

- View all sectors ✓
- View mortgage dashboard ✓
- View multiple branch dashboards -
- View operations dashboard ✓
- View residential activity panel ✓
- View user management dashboard ✓

Admin-based privileges

- Override listed negotiator or valuer for a property ✓
- Review and pay commission companywide ✓
- View mileage forms ✓

Configuration-based privileges

- Edit branches -
- Edit users -
- Setup branches ✓
- Setup lookups ✓
- Setup modules -
- Setup points ✓
- View configuration ✓

Privileges concerned with adding business

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- Setup modules -
- Setup points ✓
- View configuration ✓

Save

Branches



Alert! ONLY Available to 'Support' Level users.

24 Click "Operations"

Users

Add a user

No	Name	Photo	Identifier	Ext	Job Title	Main
1			YYY			
2	Abigail Johnson		AJO			V
3	Alexander Lambert		ALA			
4	Alfie Banks		ABA			V

25 Click "Branches"

Dynamic Agent

< Back

- Dashboard
- Users
- Branches
- Targets
- Mileage
- Lookups

Photo	Identifier	Ext	Job Title	Main
	YYY			
	AJO			V

26 Click **Branch "Name."** to edit the branch details

Branches

Click on a branch name to edit

Enter a search term

No	Name	Identifier	Postcodes	CRM ID	Invoice Prefix	
1	Aylesbury	AYL	HP19, HP20, HP21	1645678		+ Actions
2	Banbury	BAN	OX15, OX16, OX17	1623456		+ Actions
3	Didcot	DID	OX10, OX11	1656789		+ Actions
4	Oxford	OXF	OX1, OX2, OX3, OX4	1612345		+ Actions
5	Warwick	WAR	CV31, CV32, CV34, CV35	1634567		+ Actions

< 1

27 Here you can edit the branch name and the postcodes that the branch works in. Click **"Save"**

Branch

When entering a set of postcodes, separate them with commas.

Branch Name*

Postcodes*

Save

28 Click "< Back to Branches"

The screenshot shows the 'Dynamic Agent' interface. On the left is a dark sidebar with navigation items: Dashboard, ActivityPanel, Branches, Commission, Operations, and Add... The main content area is titled 'Branch' and contains a form. At the top left of the form area, there is a '< Back to Branches' link, which is circled in orange. Below this link is a green notification banner that says 'You have successfully updated'. The form itself has a heading 'Branch' and a note: 'When entering a set of postcodes, separate them with commas.' There are two input fields: 'Branch Name*' with the value 'Aylesbury' and 'Postcodes*' with the value 'HP19, HP20, HP21'. A yellow 'Save' button is located at the bottom right of the form.

Targets

29 Available to any user with suitable permissions.

30 Click "Operations"

The screenshot shows a dark sidebar on the left with the following menu items: Dashboard, ActivityPanel, Branches, Commission, Operations (highlighted with an orange circle), and Add... The main content area displays a table with the following data:

	Identifier	Postcodes
y	AYL	HP19, HP20,
y	BAN	OX15, OX16,
	DID	OX10, OX
	OXF	OX1, OX2, OX

31 Click "Targets"

The screenshot shows a dark sidebar on the left with the following menu items: Dashboard, ActivityPanel, Branches, Commission, Operations, and Add... The 'Targets' menu item is highlighted with an orange circle. The main content area displays a table with the following data:

	Identifier	Postcodes
y	AYL	HP19, HP20, HP21
y	BAN	OX15, OX16, OX17
	DID	OX10, OX11

32

This screen allows you to set targets for each metric, on a per-role or per-user basis. Start by specifying default targets for each role; and these can be altered on an individual basis if you have a part-time member of staff.

The default targets you create are then used in the monthly Target Matrix. You then have the option of setting precise targets for particular months, in line with your expected staffing and business processes. If you do not do this, then the default targets will be used for every month.

Targets are used to display progress charts in the companywide, branch and individual statistics; and also in the various higher level reports.

33

Target Matrix allows you to select a branch and a set a monthly target that is default for Valuer, Negotiator or Individual users this is then the target moving forward.

The screenshot displays the 'Target Matrix' interface. On the left, there are two dropdown menus: 'Change branch' set to 'Oxford' and 'Change month' set to 'May 2026'. Below these are two paragraphs of instructional text. The main area on the right is titled 'Targets for selected month' and contains a table with columns for metrics (List, Sale, Exch, Instr, Lgl, Mort, With, Canx, Disin) and rows for users and a 'TOTAL' row. Each cell in the table contains a numeric input field with the value '0'.

		List.	Sale	Exch.	Instr.	Lgl.	Mort.	With.	Canx	Disin.
TOTAL		0	0	0	0	0	0	0	0	0
Sofia Richards	Manager	0	0	0	0	0	0	0	0	0
Daniel Vaughan	Valuer	0	0	0	0	0	0	0	0	0
Michael Tucker	Valuer	0	0	0	0	0	0	0	0	0
Alexander Lambert	Negotiator	0	0	0	0	0	0	0	0	0
Emily O'Brien	Negotiator	0	0	0	0	0	0	0	0	0
Erin Kirk	Negotiator	0	0	0	0	0	0	0	0	0
Henry Greenwood	Negotiator	0	0	0	0	0	0	0	0	0
BALANCE		0	0	0	0	0	0	0	0	0

34

This screen is where you can set all the targets for each of the user types. If required individual user targets can be added as required.

Default Targets - Valuer	Default Targets - Negotiator	Default Targets - Individual
<p>If you add a new valuer to the system they will automatically be assigned the below targets</p> <p>Listings <input type="text" value="0"/></p> <p>Sales <input type="text" value="0"/></p> <p>Exchanges <input type="text" value="0"/></p> <p>Instructions <input type="text" value="0"/></p> <p>Legals <input type="text" value="0"/></p> <p>Mortgages <input type="text" value="0"/></p> <p>Withdrawals <input type="text" value="0"/></p> <p>Cancellations <input type="text" value="0"/></p> <p>Disinstructions <input type="text" value="0"/></p>	<p>If you add a new negotiator to the system they will automatically be assigned the below targets</p> <p>Listings <input type="text" value="0"/></p> <p>Sales <input type="text" value="0"/></p> <p>Exchanges <input type="text" value="0"/></p> <p>Instructions <input type="text" value="0"/></p> <p>Legals <input type="text" value="0"/></p> <p>Mortgages <input type="text" value="0"/></p> <p>Withdrawals <input type="text" value="0"/></p> <p>Cancellations <input type="text" value="0"/></p> <p>Disinstructions <input type="text" value="0"/></p>	<p>Use this if you want to set a different default target for a particular member of staff e.g. if they are part-time</p> <p><input type="text" value="Choose"/></p> <p>Listings <input type="text"/></p> <p>Sales <input type="text"/></p> <p>Exchanges <input type="text"/></p> <p>Instructions <input type="text"/></p> <p>Legals <input type="text"/></p> <p>Mortgages <input type="text"/></p> <p>Withdrawals <input type="text"/></p> <p>Cancellations <input type="text"/></p>

35 Once set the targets will show in the **"Targets for the selected month"** screen.

The **'Total'** are shown at the top of the screen, showing the total number of (for example) Sales targeted for that month. If required, the figures can be edited on this screen and the totals will update.

The **Balance** option at the bottom of the screen allows additional targets to be set which are over and above the individual targets eg the 'Sale' column has a target of 25 for all the users and a 'Balance' of 300 making the total 325.

Change branch

Change month

This will auto-populate once you have set default targets below, and will auto-calculate the branch target for each metric. You can make a change to any target and it will recalculate. Once you are happy with the targets for a given month, click Save (default targets save automatically).

If you have a higher target in mind but do not want to increase individual targets, use the Balance option to increase your branch target.

	List.	Sale	Exch.	Instr.	Lgl.	Mort.	With.	Canx	Disin.
TOTAL	30	325	25	3	15	13	4	2	0
Brooke Rowley - Manager	10	0	0	0	0	0	0	0	0
Edward Davis - Valuer	20	0	0	0	0	4	4	0	0
Kyle Wood - Valuer	0	8	0	0	5	1	0	0	0
Amelia James - Negotiator	0	12	0	0	8	5	0	2	0
Benjamin Kemp - Negotiator	0	0	0	0	0	0	0	0	0
Jasmine Wells - Negotiator	0	5	0	3	2	1	0	0	0
Scarlett Stone - Negotiator	0	0	25	0	0	2	0	0	0
BALANCE	0	300	0	0	0	0	0	0	0

Save

Mileage

36 Available to any user with suitable permissions.

37 Click "Operations"

May 2026

This will auto-populate once you have set default targets below, and will auto-calculate the branch target for each metric. You can make a change to any target and it will recalculate. Once you are happy with the targets for a given month, click Save (default targets save automatically).

If you have a higher target in mind but do not want to increase individual targets, use the Balance option to increase your branch target.

Brooke Rowley	Manager
Edward Davis	Valuer
Kyle Wood	Valuer
Amelia James	Negotiator
Benjamin Kemp	Negotiator
Jasmine Wells	Negotiator

38 Click "Mileage"

Dynamic Agent

< Back

Dashboard

Users

Branches

Targets

Mileage

Lookups

May 2026

TOTAL

Brooke Rowley	Manager
Edward Davis	Valuer
Kyle Wood	Valuer
Amelia James	Negotiator
Benjamin Kemp	Negotiator

39

Mileage Form Management this screen allows you to review mileage claims and give users the ability to claim mileage.

Mileage Form Management

Total
1

Submitted
0

No	Name	Mileage Group Code	Brought Forward	This Month	Total	Payable	Expenses	Uploads	Total Payout	Status	Last Updated	Checked?	
1	Jake Martin	Default	125.0	10.0	135	£0.00	0	0	£0.00	Pending	Wednesday 20th May at 2.32pm	<input type="checkbox"/>	+ Actions

<

1

>

Mileage Form Setup

This screen allows you to set up and review mileage forms.

To allow a member of staff to complete a mileage form, you must first grant them the "claim mileage" privilege through their user profile. They will then appear in the list, and then you should assign them an initial mileage figure. This will often be zero, but if you are migrating from another mileage

No	Name	Branch	Mileage Group Code	Total Forms	Initial Mileage	
1	Abigail Johnson	Warwick	Default	0	Not set up	+ Actions
2	Amber Smith	Banbury	Default	0	Not set up	+ Actions
3	Anthony Martin	Banbury	Default	0	Not set up	+ Actions
4	Brandon Roberts	Warwick	Default	0	Not set up	+ Actions
5	Brooke Rowley	Aylesbury	Default	0	Not set up	+ Actions
6	Daniel Vaughan	Oxford	Default	0	Not set up	+ Actions

40

The **Mileage Form Setup** screen. To claim mileage a user must be given permission to claim mileage in their User Profile. They will then appear in this list, once they show in this list click the '+Actions' button. If the User has 'Added' in their row they have been set up to claim mileage, if 'Not Setup' shows, they are not.

Mileage Form Setup

This screen allows you to set up and review mileage forms.

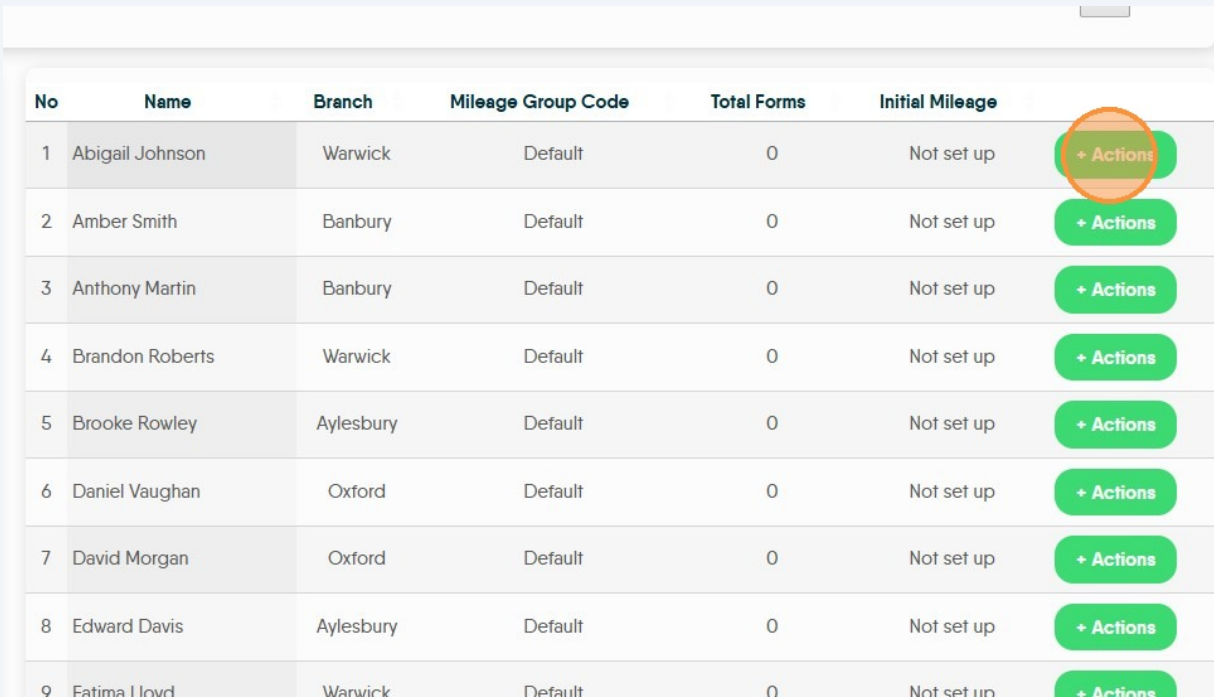
To allow a member of staff to complete a mileage form, you must first grant them the "claim mileage" privilege through their user profile. They will then appear in the list, and then you should assign them an initial mileage figure. This will often be zero, but if you are migrating from another mileage

No	Name	Branch	Mileage Group Code	Total Forms	Initial Mileage	
1	Abigail Johnson	Warwick	Default	0	Not set up	+ Actions
2	Amber Smith	Banbury	Default	0	Not set up	+ Actions
3	Anthony Martin	Banbury	Default	0	Not set up	+ Actions
4	Brandon Roberts	Warwick	Default	0	Not set up	+ Actions
5	Brooke Rowley	Aylesbury	Default	0	Not set up	+ Actions
6	Daniel Vaughan	Oxford	Default	0	Not set up	+ Actions
7	David Morgan	Oxford	Default	0	Not set up	+ Actions
8	Edward Davis	Aylesbury	Default	0	Not set up	+ Actions
9	Fatima Lloyd	Warwick	Default	0	Not set up	+ Actions
10	Jack O'Connor	Didcot	Default	0	Not set up	+ Actions
11	Jake Martin	Aylesbury	Default	1	Added	+ Actions

41

To set up/enable the user to claim mileage an initial starting mileage needs to be added. This helps to track the users business mileage for any thresholds they might hit. If you are moving from another platform this enables you to keep continuity of records.

Click "+ Actions"



No	Name	Branch	Mileage Group Code	Total Forms	Initial Mileage	
1	Abigail Johnson	Warwick	Default	0	Not set up	+ Actions
2	Amber Smith	Banbury	Default	0	Not set up	+ Actions
3	Anthony Martin	Banbury	Default	0	Not set up	+ Actions
4	Brandon Roberts	Warwick	Default	0	Not set up	+ Actions
5	Brooke Rowley	Aylesbury	Default	0	Not set up	+ Actions
6	Daniel Vaughan	Oxford	Default	0	Not set up	+ Actions
7	David Morgan	Oxford	Default	0	Not set up	+ Actions
8	Edward Davis	Aylesbury	Default	0	Not set up	+ Actions
9	Fatima I Lovel	Warwick	Default	0	Not set up	+ Actions

42

Complete the option shown on screen, if applicable. To set initial mileage, click this text field and add the initial mileage. This will most likely be 0 to start

Click "Save"

There will now be a number 1 in the Forms column.

Name	Branch	Mileage Group Code	Total Forms	Initial Mileage	
Assign group code	Default	First mileage month	May 2026	Set initial mileage	Hide
			<input type="text" value="0"/>	Save	
nith	Banbury	Default	0	Not set up	+ Actions
Martin	Banbury	Default	0	Not set up	+ Actions
Roberts	Warwick	Default	0	Not set up	+ Actions
Rowley	Aylesbury	Default	0	Not set up	+ Actions
Roughan	Oxford	Default	0	Not set up	+ Actions
Morgan	Oxford	Default	0	Not set up	+ Actions
Javis	Aylesbury	Default	0	Not set up	+ Actions

Name	Branch	Mileage Group Code	Total Forms	Initial Mileage	
Assign group code	Default	First mileage month	May 2026	Set initial mileage	Hide
			<input type="text" value="0"/>	Save	
Smith	Banbury	Default	0	Not set up	+ Actions
My Martin	Banbury	Default	0	Not set up	+ Actions
Robertson	Warwick	Default	0	Not set up	+ Actions
Rowley	Aylesbury	Default	0	Not set up	+ Actions
Roughan	Oxford	Default	0	Not set up	+ Actions
Morgan	Oxford	Default	0	Not set up	+ Actions

< 1 >

Name	Branch	Mileage Group Code	Total Forms	Initial Mileage	
Rigail Johnson	Warwick	Default	1	Added	+ Actions
Robert Smith	Banbury	Default	0	Not set up	+ Actions
Anthony Martin	Banbury	Default	0	Not set up	+ Actions
Brandon Roberts	Warwick	Default	0	Not set up	+ Actions
Bob Rowley	Aylesbury	Default	0	Not set up	+ Actions
Daniel Vaughan	Oxford	Default	0	Not set up	+ Actions
David Morgan	Oxford	Default	0	Not set up	+ Actions

43 To review a mileage form. Click "+Actions"

Submitted
0

Total	Payable	Expenses	Uploads	Total Payout	Status	Last Updated	Checked?	
0	£0.00	0	0	£0.00	Not started	Friday 22nd May at 1.46pm	<input type="checkbox"/>	+ Actions
135	£0.00	0	0	£0.00	Pending	Wednesday 20th May at 2.32pm	<input type="checkbox"/>	+ Actions

< 1 >

Name	Branch	Mileage Group Code	Total Forms	Initial Mileage	
Johnson	Warwick	Default	1	Added	+ Actions
Smith	Banbury	Default	0	Not set up	+ Actions

44

Click **"View form"** This will show the mileage form and allow you to review all the entries for mileage and if enabled expenses, including any receipts uploaded.

This is not where the mileage form is approved from.

Total	Payable	Expenses	Uploads	Total Payout	Status	Last Updated	Checked?	
0	£0.00	0	0	£0.00	Not started	Friday 22nd May at 1.46pm	<input type="checkbox"/>	+ Actions
					View form	Edit form on behalf	Hide	

Name	Branch	Mileage Group Code	Total Forms	Initial Mileage	
Johnson	Warwick	Default	1	Added	+ Actions
Smith	Banbury	Default	0	Not set up	+ Actions

45

Click **"Edit form on behalf"** to edit the form for the User.

This allows you to add mileage to a users form, as well as adding expenses.

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Mileage Form Management

Total 2 Submitted 0

No	Name	Mileage Group Code	Brought Forward	This Month	Total	Payable	Expenses	Uploads	Total Payout	Status	Last Updated	Checked?	
1	Abigail Johnson	Default	0.0	0.0	0	£0.00	0	0	£0.00	Not started	Friday 22nd May at 1.46pm	<input type="checkbox"/>	+ Actions
											View form	Edit form on behalf	Hide

Mileage Form Setup

This screen allows you to set up and review mileage forms.

To allow a member of staff to complete a mileage form, you must first grant them the "claim mileage" privilege through their user profile. They will then appear in the list and then you should

No	Name	Branch	Mileage Group Code	Total Forms	Initial Mileage	
1	Abigail Johnson	Warwick	Default	1	Added	+ Actions
2	Amber Smith	Banbury	Default	0	Not set up	+ Actions
3	Anthony Martin	Banbury	Default	0	Not set up	+ Actions
4	Brandon Roberts	Warwick	Default	0	Not set up	+ Actions

46 The form shows any mileage brought forward, total this month so far and total.

To add a mileage claim, click into the journey details and add your journey, add the mileage to the 'Miles' field. Add 1 leg of the trip per line. Click the "Journey Details (one location per line)" field.

Jake Martin's mileage form for May 2026

Date Miles

Journey Details (one location per line)

Open Google Maps (0 locations added)

125 brought forward	£0.00 expenses	10 this month	£0.00 mileage	135 total
<input type="button" value="Show expenses (0)"/>		<input type="button" value="Show uploads (0)"/>		<input type="button" value="Finish and send"/>

Diary

Jake Martin's mileage form for May 2026

Date Miles

Journey Details (one location per line)

Open Google Maps (0 locations added)

125 brought forward	£0.00 expenses	10 this month	£0.00
<input type="button" value="Show expenses (0)"/>		<input type="button" value="Show uploads (0)"/>	

Diary

47

At this point if you know the distance travelled, click into the 'Miles' field and add the distance. If not, or you want to check, click **"Open Google Maps..."** This will take you to a screen showing the trip on google maps, where you can get the mileage.
Click here.

Jake Martin's mileage form for May 2026

Date Miles

Journey Details (one location per line)

dl22hx
tf11dd
gosforth
hurworth

Open Google Maps (5 locations added)

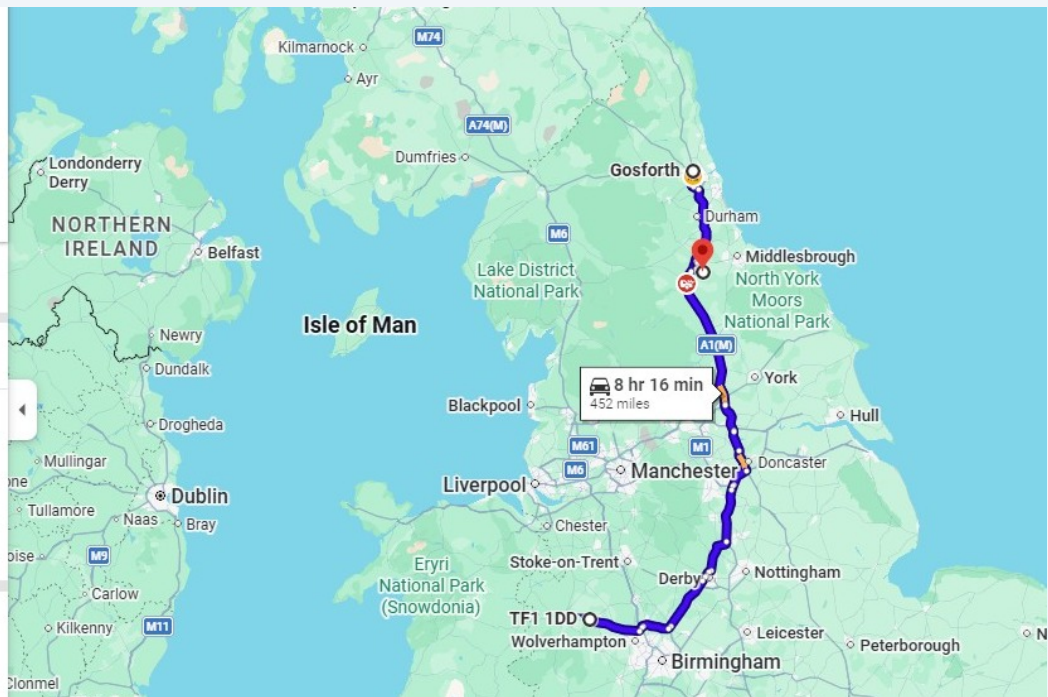
125 brought forward
£1.00 expenses

Diary

on, Telford
yne

Options

el
8 hr 16 min
ffic 452 miles



48

To claim 'Expenses' click '**Show Expenses**' this will show any expense currently claimed, this could be parking, coffee, milk etc it is not mileage.

To add an expense record

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ke Martin's mileage form for May 2026

te Miles

ourney Details (one location per line)

en Google Maps (0 locations added)

Show your location picker

125 brought forward	544 this month	669 total
£1.00 expenses	£0.00 mileage	

Diary

49

Click "**Show expenses**"

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Martin's mileage form for May 2026

mm/yyyy Miles

y Details (one location per line)

oogle Maps (0 locations added)

Show your location picker

125 brought forward	544 this month	669 total
£1.00 expenses	£0.00 mileage	

Diary

50

Add the details of the expense into the 'Details' field and the amount into the '£' field then click '**Add**'

tin's mileage form for May 2026

yyyy Miles

tails (one location per line)

gle Maps (0 locations added)

Add

Show your location picker

125 brought forward £1.00 expenses 544 this month £0.00 mileage 669 total

Hide expenses (1) Show uploads (0) Finish and send

Expenses (1)

If you have an expense to claim, add it here (scroll if you have lots of expenses).

(x) lunch - £1.00

Details... £ 0.00 ADD

Diary

51

To add receipts for expenses or mileage. Click "**Show uploads**" click into the field that shows and either drag and drop or search your device for the images. If you are using a mobile device, an option to use the camera will show. Click "Tap here to add your photos (or drag & drop)"

tin's mileage form for May 2026

yyyy Miles

tails (one location per line)

gle Maps (0 locations added)

Add

Show your location picker

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125 brought forward £1.00 expenses 544 this month £0.00 mileage 669 total

Hide expenses (1) Show uploads (0) Finish and send

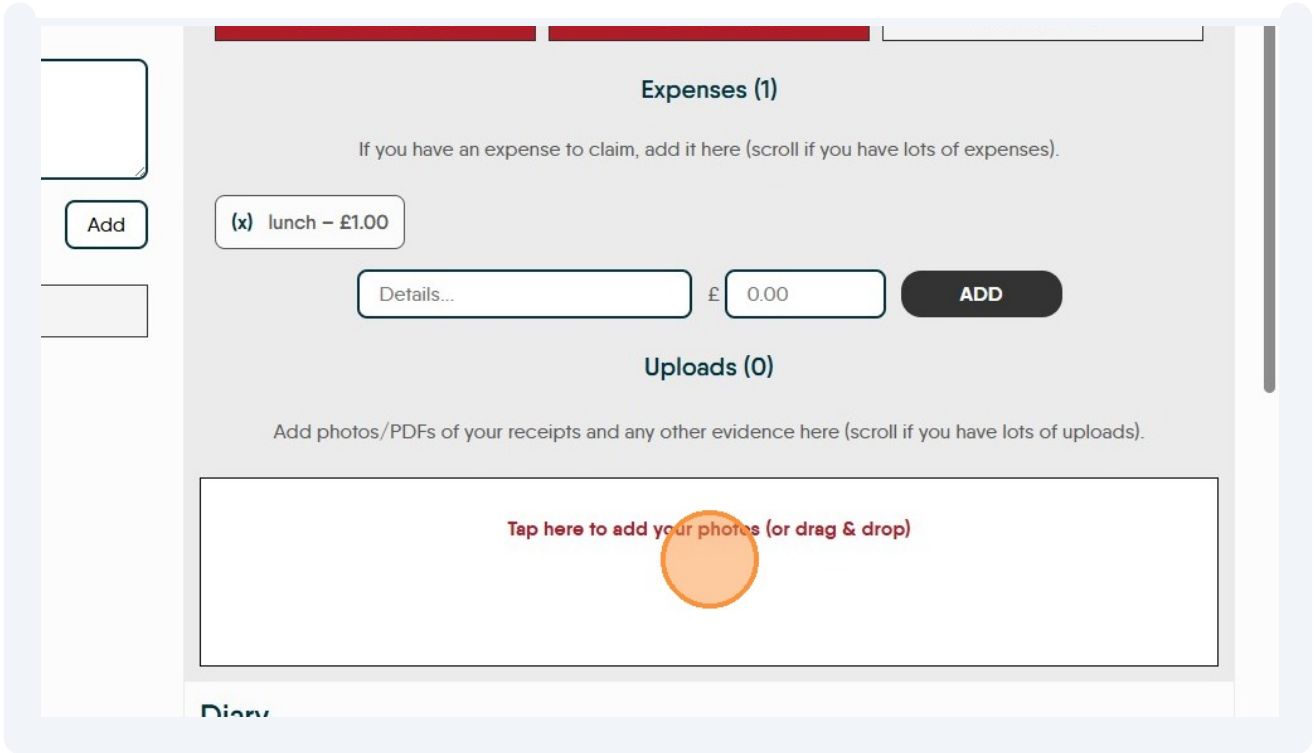
Expenses (1)

If you have an expense to claim, add it here (scroll if you have lots of expenses).

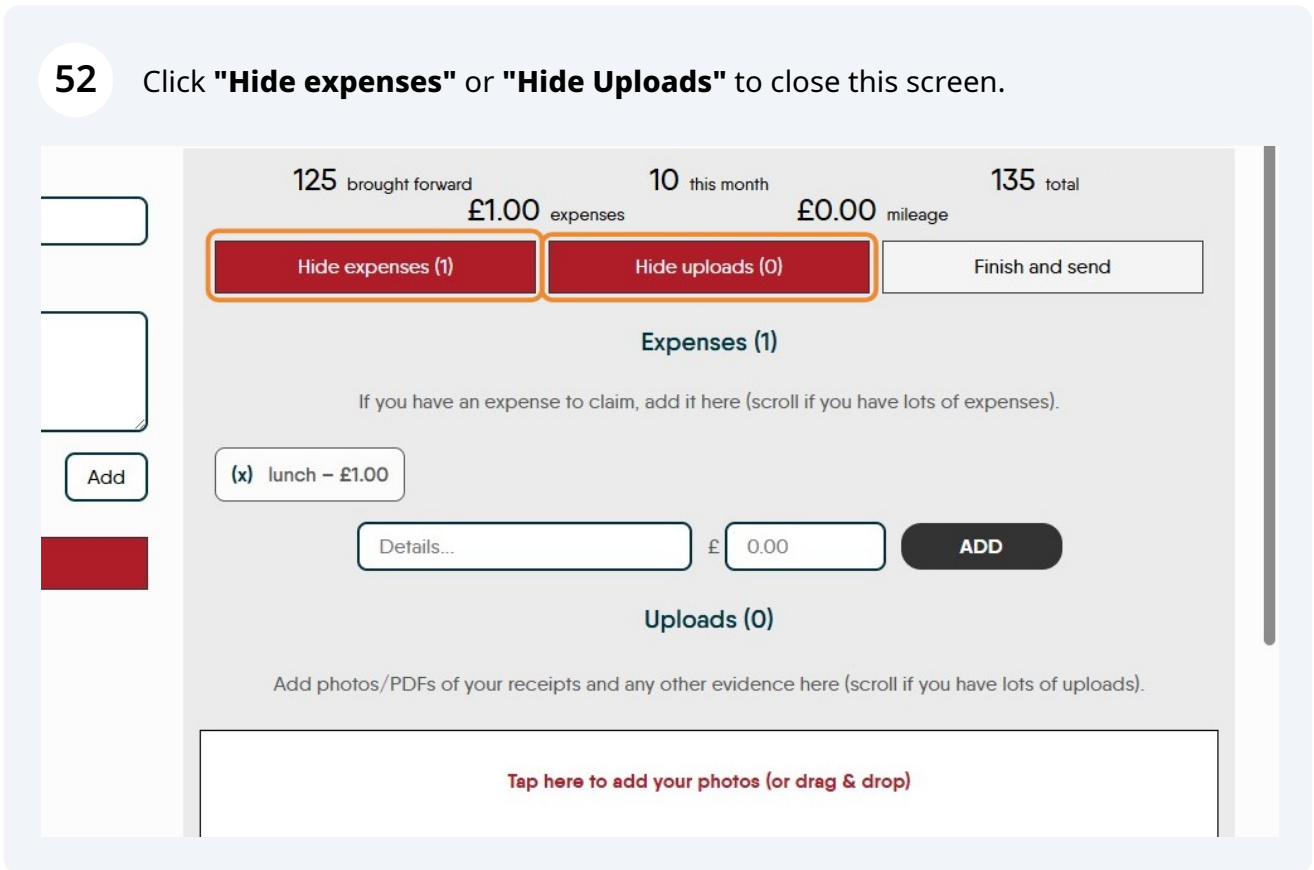
(x) lunch - £1.00

Details... £ 0.00 ADD

Diary



52 Click **"Hide expenses"** or **"Hide Uploads"** to close this screen.



53

If you need to complete and submit the expenses on behalf of your user. Click **"Finish and send"**

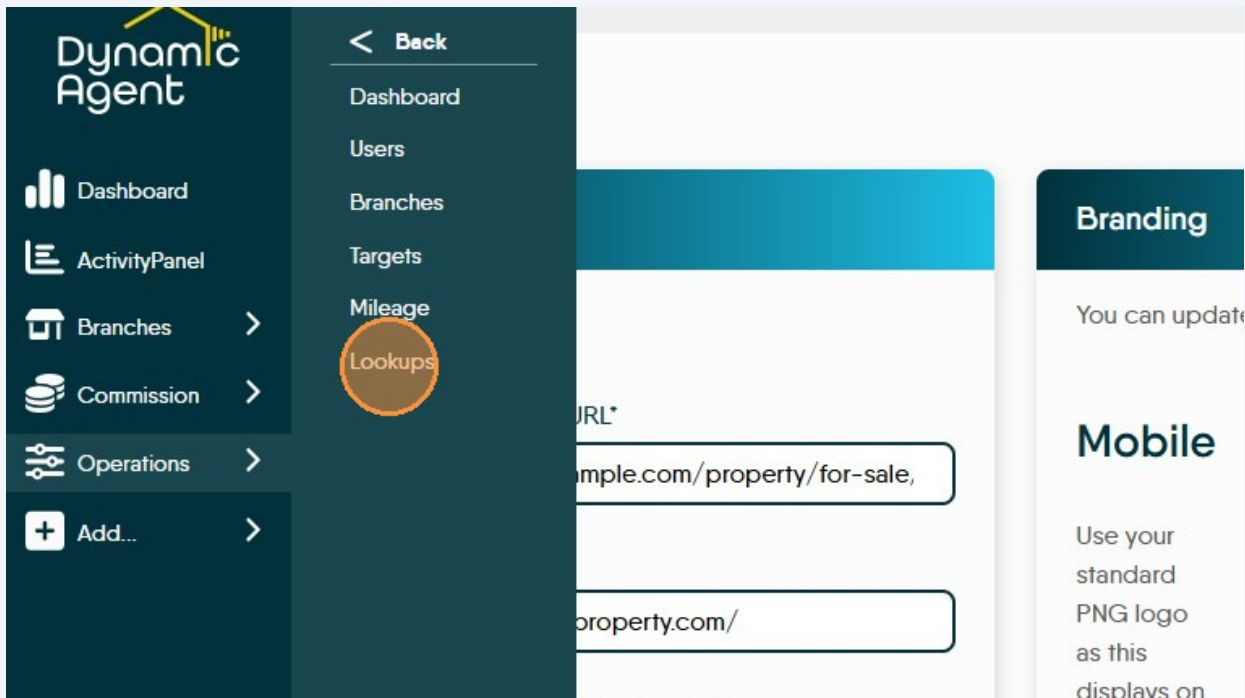
The screenshot shows a web interface for a mileage form. At the top right, there are navigation links: iamproperty, crm, movebutler, iamsold, and dynamicagent. The main heading is "tin's mileage form for May 2026". On the left, there are input fields for "Miles" (with a calendar icon) and "tails (one location per line)". Below these is a "Google Maps (0 locations added)" section with an "Add" button and a "Show your location picker" button. On the right, a summary box displays: "125 brought forward", "£1.00 expenses", "544 this month", "£0.00 mileage", and "669 total". Below the summary are three buttons: "Hide expenses (1)", "Hide uploads (0)", and "Finish and send" (which is circled in orange). Underneath is the "Expenses (1)" section, containing a list item "(x) lunch - £1.00" and a form to add a new expense with a "Details..." field, a "£ 0.00" amount field, and an "ADD" button. Below that is the "Uploads (0)" section with a "Tap here to add your photos (or drag & drop)" instruction. At the bottom, there is a "Diary" section.

Lookups

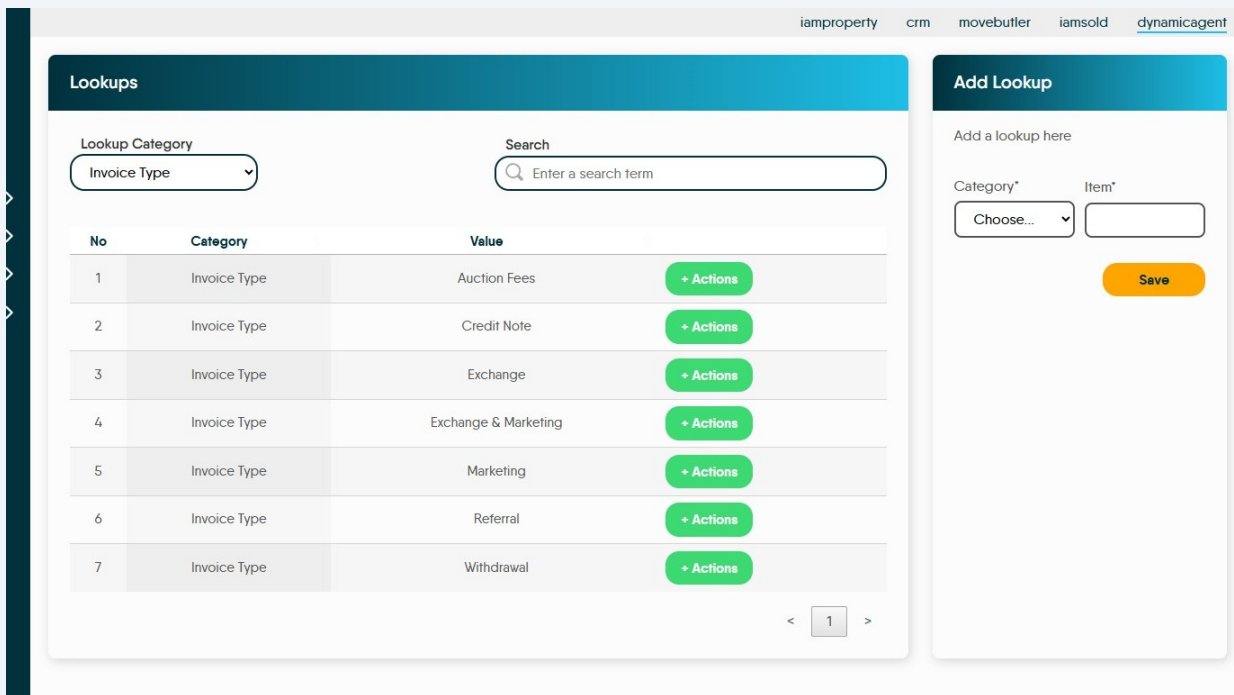
54

Available to any user with suitable permissions.

55 Click "Lookups"



56 This screen allows new 'Lookups' to be added



57

To review the Lookups that are already in Dynamic Agent. Click '**Lookup Category**' and from the drop down menu select the option e.g. 'Conveyancer'

There are 3 options Conveyancer, Mortgage Provider and Surveyor

Click "**Category**" to see the categories.

The screenshot shows the 'Lookups' interface. At the top, there is a 'Lookup Category' dropdown menu with 'Conveyancer' selected, and a search bar with the placeholder text 'Enter a search term'. Below this is a table with the following data:

No	Category	Value	
1	Conveyancer	Acme Conveyancing	+ Actions
2	Conveyancer	British Conveyancers	+ Actions
3	Conveyancer	Gamma	+ Actions

The screenshot shows the 'Lookups' interface with the 'Lookup Category' dropdown menu open. The dropdown menu is highlighted with an orange box and contains the following options: 'Show all', 'Conveyancer', 'Mortgage Provider', and 'Surveyor'. The table below the dropdown menu is partially visible, showing the same data as the previous screenshot.

58

Click "**+Actions**" to delete the lookup from Dynamic Agent.

Click **"Delete Lookup"** to remove the lookup from the list.

Lookups

Lookup Category: Invoice Type

Search: Enter a search term

No	Category	Value	
1	Invoice Type	Auction Fees	+ Actions
2	Invoice Type	Credit Note	+ Actions
3	Invoice Type	Exchange	+ Actions
4	Invoice Type	Exchange & Marketing	+ Actions
5	Invoice Type	Marketing	+ Actions
6	Invoice Type	Referral	+ Actions

Lookups

Lookup Category: Invoice Type

Search: Enter a search term

No	Category	Value	
			Delete Lookup Hide
2	Invoice Type	Credit Note	+ Actions
3	Invoice Type	Exchange	+ Actions
4	Invoice Type	Exchange & Marketing	+ Actions
5	Invoice Type	Marketing	+ Actions
6	Invoice Type	Referral	+ Actions

59 Add Lookup

i Tip! Lookups are the drop down menus in Dynamic Agent.

60 The **'Add Lookup'** screen allows new lookup items to be added.

The screenshot displays two parts of a user interface. On the left is a search table with a header 'Value' and three rows: 'Acme Conveyancing', 'British Conveyancers', and 'Gamma'. Each row has a green '+ Actions' button. Below the table is a pagination control showing '< 1 >'. On the right is a form titled 'Add Lookup' with a blue header. Below the title is the text 'Add a lookup here'. There are two input fields: 'Category*' with a dropdown menu showing 'Choose...' and 'Item*' with an empty text box. A yellow 'Save' button is located below these fields.

61 Click **"Category"** Choose from Conveyancer, Mortgage Provider, Surveyor.

Click the **"Item*"** field and add the detail of the new lookup, in this case a new 'Mortgage Provider'

Click **"Save"**

Search

Enter a search term

Value

Acme Conveyancing	+ Actions
British Conveyancers	+ Actions
Gamma	+ Actions

< 1 >

Add Lookup

Add a lookup here

Category*

Item*

Save

Search

Enter a search term

Value

Acme Conveyancing	+ Actions
British Conveyancers	+ Actions
Gamma	+ Actions

< 1 >

Add Lookup

Add a lookup here

Category*

Item*

Choose...
 Conveyancer
 Mortgage Provider
 Surveyor

Save

Search

Enter a search term

Value

No matching records found

< >

Add Lookup

Add a lookup here

Category*

Item*

Save

iamproperty crm movebutler iamsold dynamicagent

Search

Enter a search term

Value

No matching records found

< >

Add Lookup

Add a lookup here

Category*

Item*

Save

62 The new lookup will show in the '**Lookup Category**' field.

In this case select the "**Mortgage Provider**" option and the new option shows.

The screenshot shows a 'Lookups' interface. At the top, there is a dark blue header with the word 'Lookups' in white. Below the header, there are two main sections. The first section is a 'Lookup Category' field with a dropdown menu. The dropdown menu is open, showing 'Mortgage Provider' as the selected option, which is highlighted with an orange circle. To the right of the dropdown is a 'Search' field with a magnifying glass icon and the placeholder text 'Enter a search term'. Below these fields is a table with three columns: 'No', 'Category', and 'Value'. The table has one row with the following data: '1' in the 'No' column, 'Mortgage Provider' in the 'Category' column, and 'Santander' in the 'Value' column. To the right of the 'Value' column, there is a green button with the text '+ Actions'. The table is enclosed in an orange border, and there is a small pagination control at the bottom right of the table showing the number '1'.

No	Category	Value	
1	Mortgage Provider	Santander	+ Actions