

Updating Personal Details in iamproperty CRM



This guide provides a straightforward process for updating personal details in iamproperty CRM, ensuring your information remains current and accurate.

By following the steps outlined, users can efficiently manage their profiles, which is crucial for effective communication allowing accurate use of email and SMS templates created through the CRM.

1

Navigate to <https://crm.iamproperty.com/MyDay>

iamproperty

My dayLettingsSalesAccountsReportingCommunications

My account

Welcome back, Training

+ Add New Record

View property management

Visit help centre

Search all records

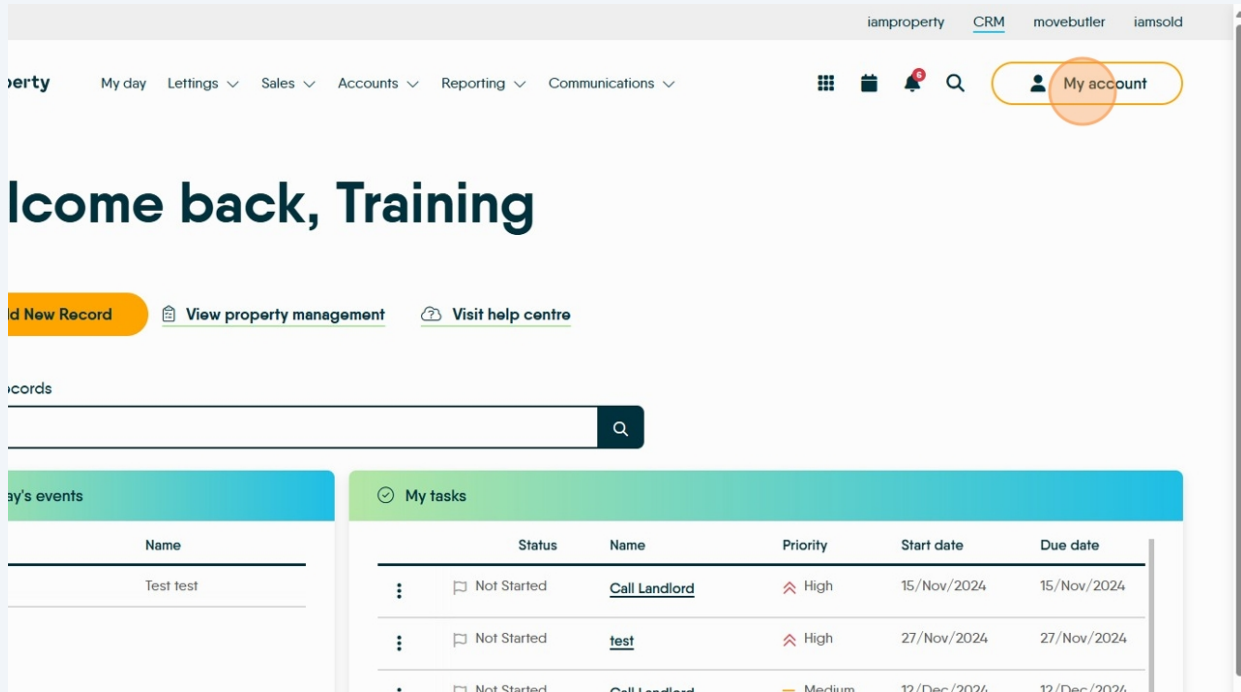
Today's events

Time	Name
12:00	Test test

My tasks

Status	Name	Priority	Start date	Due date
Not Started	Call Landlord	High	15/Nov/2024	15/Nov/2024
Not Started	test	High	27/Nov/2024	27/Nov/2024
Not Started	Call Landlord	Medium	12/Dec/2024	12/Dec/2024
Not Started	Call back	High	03/Jan/2025	03/Jan/2025

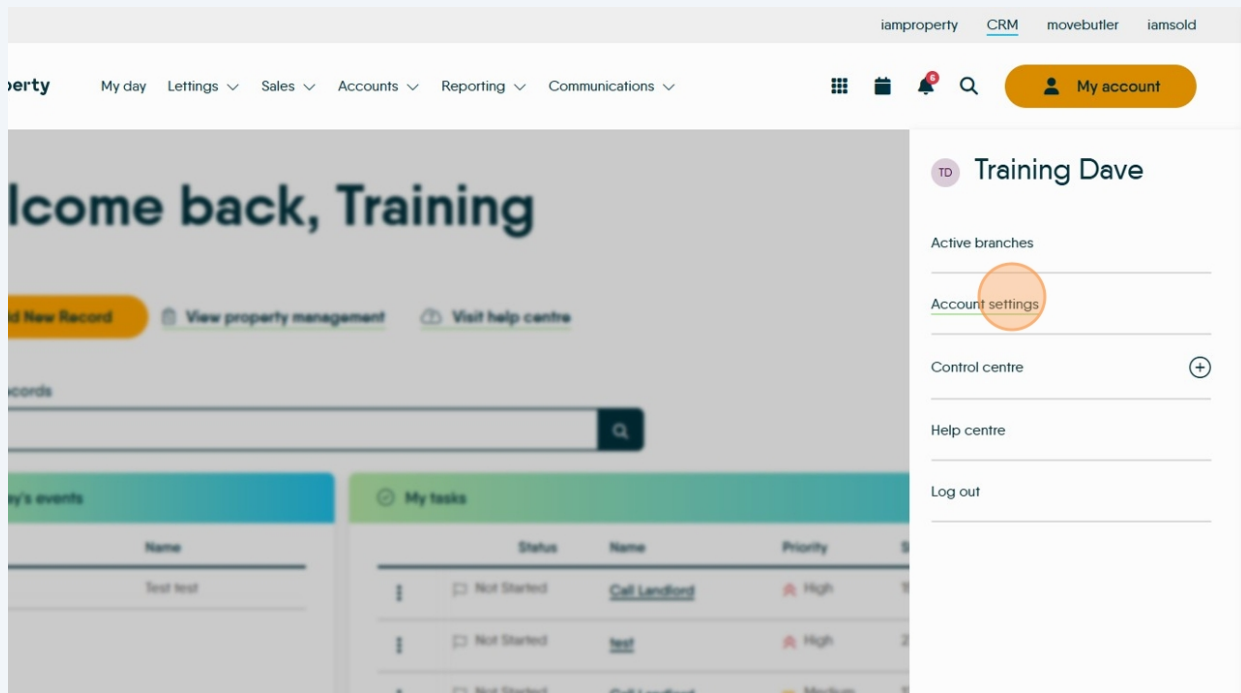
2 Click "My Account"



The screenshot shows the CRM dashboard with the 'My account' button highlighted in the top right corner. The dashboard includes a navigation bar with links to 'My day', 'Lettings', 'Sales', 'Accounts', 'Reporting', and 'Communications'. The main content area displays a welcome message 'Welcome back, Training' and a search bar. Below the search bar, there are two sections: 'My events' and 'My tasks'. The 'My tasks' section contains a table with columns for Status, Name, Priority, Start date, and Due date.

Status	Name	Priority	Start date	Due date
Not Started	Call Landlord	High	15/Nov/2024	15/Nov/2024
Not Started	test	High	27/Nov/2024	27/Nov/2024
Not Started	Call Landlord	Medium	12/Dec/2024	12/Dec/2024

3 Click "Account settings"



The screenshot shows the CRM dashboard with the 'Account settings' link highlighted in the user profile menu. The dashboard includes a navigation bar with links to 'My day', 'Lettings', 'Sales', 'Accounts', 'Reporting', and 'Communications'. The main content area displays a welcome message 'Welcome back, Training' and a search bar. Below the search bar, there are two sections: 'My events' and 'My tasks'. The 'My tasks' section contains a table with columns for Status, Name, Priority, Start date, and Due date.

Status	Name	Priority	Start date	Due date
Not Started	Call Landlord	High	15/Nov/2024	15/Nov/2024
Not Started	test	High	27/Nov/2024	27/Nov/2024
Not Started	Call Landlord	Medium	12/Dec/2024	12/Dec/2024

- 4 Click here to set your "Title" from the drop down menu.

Account settings

Personal details

Profile picture



Change Profile Picture

Title

Mr



Forename

Training

Surname

Dave

User name (Optional)

- 5 Click the "Forename" field.

iam property

My day Lettings Sales Accounts Reporting Communications



My acc



Change Profile Picture

Title

Mr



Forename

Training

Surname

Dave

User name (Optional)

Davidmorgan

Email Address

david.morgan@iamproperty.com


Phone (Optional)

6 Click the "Surname" field.

Account settings

Personal details

Profile picture



[Change Profile Picture](#)

Title

▼

Forename


Surname

User name (Optional)

7 Click the "User name" field, this can be used as your login instead of your email address.

iamproperty CRM movebutler

iamproperty My day Lettings Sales Accounts Reporting Communications



User name (Optional)

Email Address

Phone (Optional)

13 / 15


Mobile Phone (Optional)

0 / 15

Work phone (Optional)

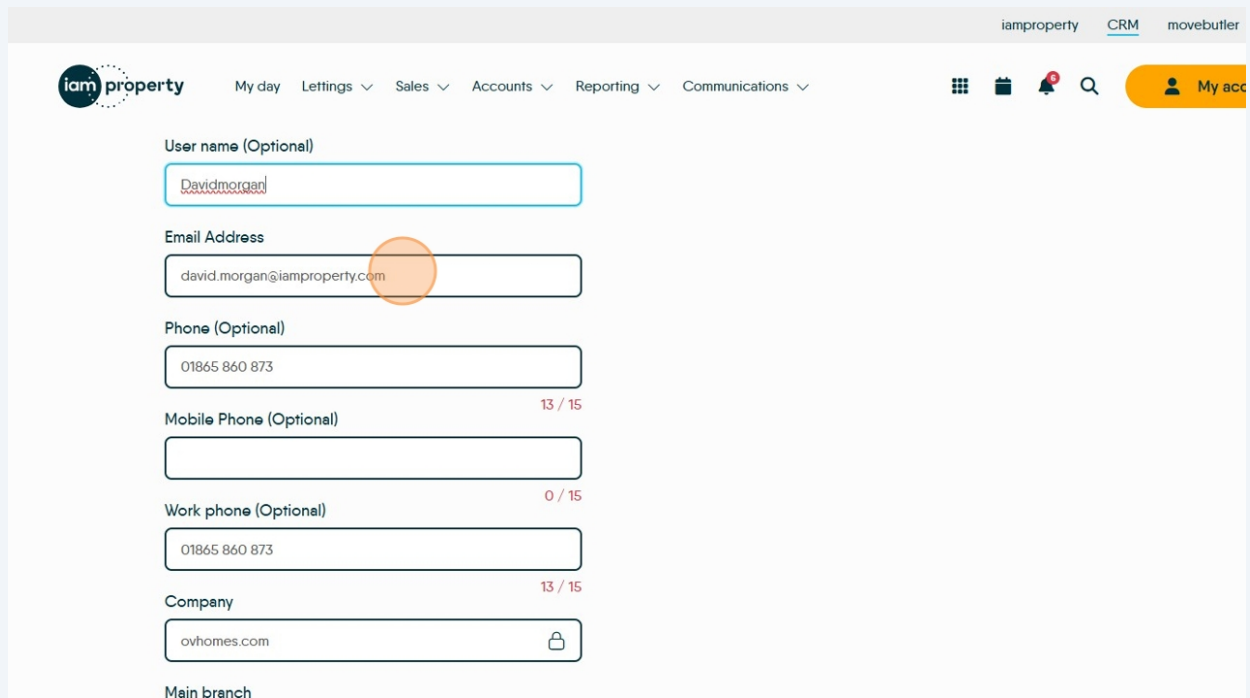
13 / 15

Company



Main branch

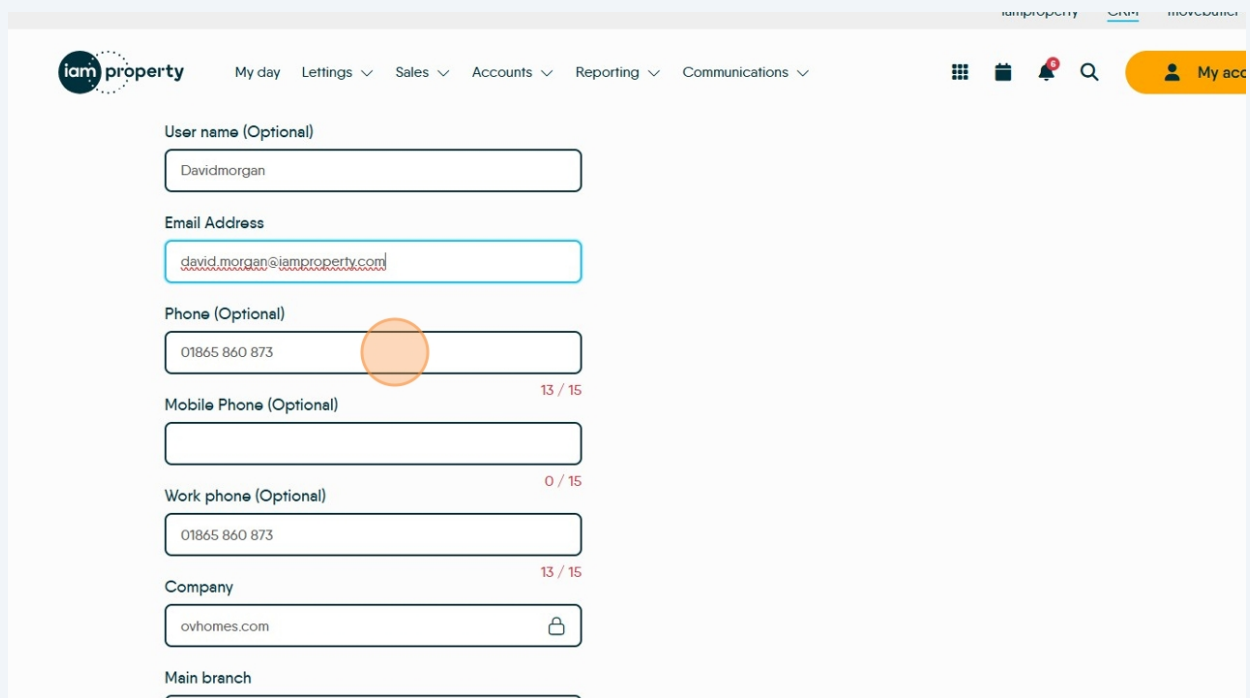
8 Click the "Email Address" field.



The screenshot shows the 'ian property' CRM interface. The top navigation bar includes 'My day', 'Lettings', 'Sales', 'Accounts', 'Reporting', and 'Communications'. The user profile 'My acc' is visible in the top right. The profile form contains the following fields:

- User name (Optional)**: Davidmorgan
- Email Address**: david.morgan@iamproperty.com (highlighted with an orange circle)
- Phone (Optional)**: 01865 860 873
- Mobile Phone (Optional)**: 13 / 15
- Work phone (Optional)**: 0 / 15
- Company**: ovhomes.com (13 / 15)
- Main branch**: (empty)

9 Click the "Phone" field.



The screenshot shows the same 'ian property' CRM profile page, but with the 'Phone (Optional)' field highlighted by an orange circle. The form fields are:

- User name (Optional)**: Davidmorgan
- Email Address**: david.morgan@iamproperty.com
- Phone (Optional)**: 01865 860 873 (highlighted)
- Mobile Phone (Optional)**: 13 / 15
- Work phone (Optional)**: 0 / 15
- Company**: ovhomes.com (13 / 15)
- Main branch**: (empty)

10 Click the "Mobile Phone" field.

User name (Optional)

Email Address

Phone (Optional)
 13 / 15

Mobile Phone (Optional)
 0 / 15

Work phone (Optional)
 13 / 15

Company

Main branch

11 Click the "Work phone" field.

User name (Optional)

Email Address

Phone (Optional)
 13 / 15

Mobile Phone (Optional)
 0 / 15

Work phone (Optional)
 13 / 15

Company

Main branch

Save Personal Details

12 Click here and check the company name is correct.

user name (Optional)
Davidmorgan

Email Address
david.morgan@iamproperty.com

Phone (Optional)
01865 860 873

Mobile Phone (Optional) 13 / 15

Work phone (Optional) 0 / 15
01865 860 873

Company 13 / 15
ovhomes.com

Main branch
Morgan & Co

Save Personal Details

13 Click here and check the correct branch is selected as the 'Main Branch' you work from

user name (Optional)
Davidmorgan

Email Address
david.morgan@iamproperty.com

Phone (Optional)
01865 860 873

Mobile Phone (Optional) 13 / 15

Work phone (Optional) 0 / 15
01865 860 873

Company 13 / 15
ovhomes.com

Main branch
Morgan & Co

Save Personal Details



Tip! This controls what properties you can access without having multiple branches enabled from the 'Active Branches' option in the menu.

14 Click "Save personal details"

user name (Optional)

Davidmorgan

Email Address

david.morgan@iamproperty.com

Phone (Optional)

01865 860 873

Mobile Phone (Optional)

13 / 15

Work phone (Optional)

0 / 15

01865 860 873

Company

13 / 15

ovhomes.com

Main branch

Morgan & Co

Save Personal Details