

# 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.

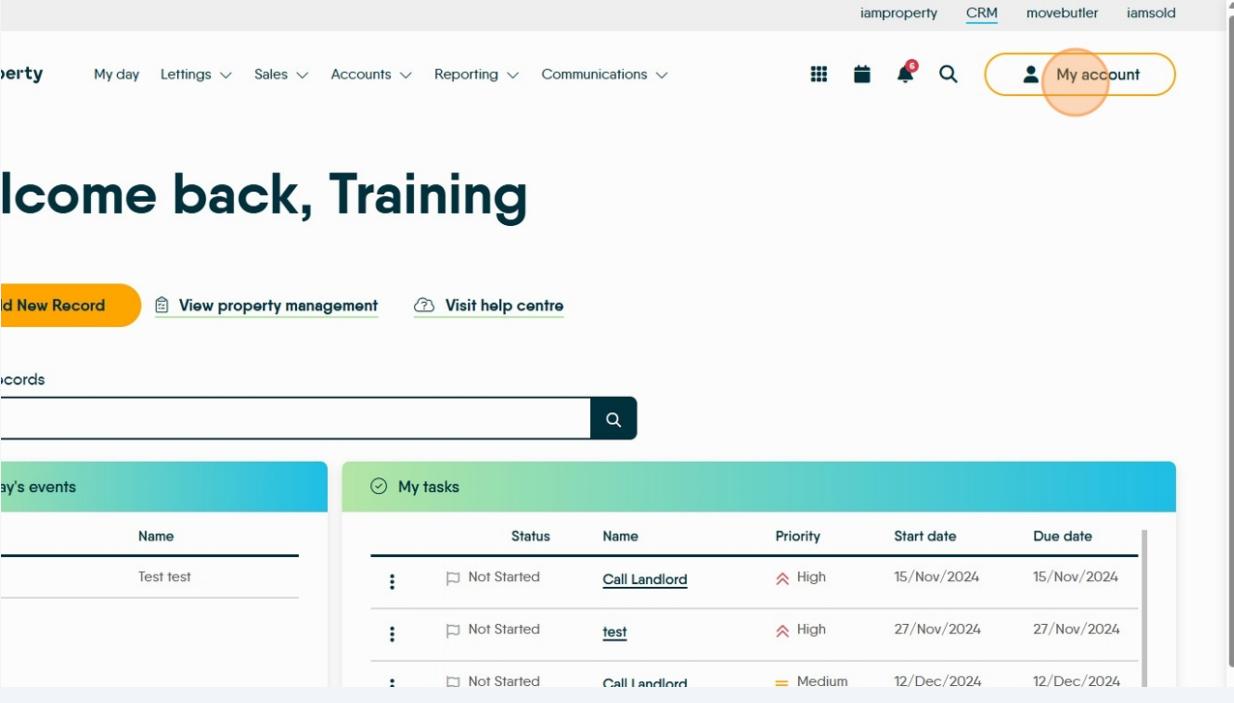
By following the steps outlined, users can efficiently manage their profiles, which is crucial for effective communication allowing accurate use of email and SMS templates created through the CRM.

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

A screenshot of the iamproperty CRM 'My Day' dashboard. At the top, there is a navigation bar with links for 'My day', 'Lettings', 'Sales', 'Accounts', 'Reporting', and 'Communications'. To the right of the navigation bar are icons for a grid view, a calendar, a bell, a search bar, and a user profile labeled 'My account'. Below the navigation bar, a large green header says 'Welcome back, Training'. Underneath the header, there are three buttons: '+ Add New Record', 'View property management', and 'Visit help centre'. A search bar with the placeholder 'Search all records' is followed by a magnifying glass icon. The main content area is divided into two sections: 'Today's events' and 'My tasks'. The 'Today's events' section shows a single event at 12:00 with the name 'Test test'. The 'My tasks' section shows four tasks: 'Call Landlord' (High priority, due 15/Nov/2024), 'test' (High priority, due 27/Nov/2024), 'Call Landlord' (Medium priority, due 12/Dec/2024), and 'Call back' (High priority, due 03/Jan/2025).

Time	Name	Status	Name	Priority	Start date	Due date
12:00	Test test	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

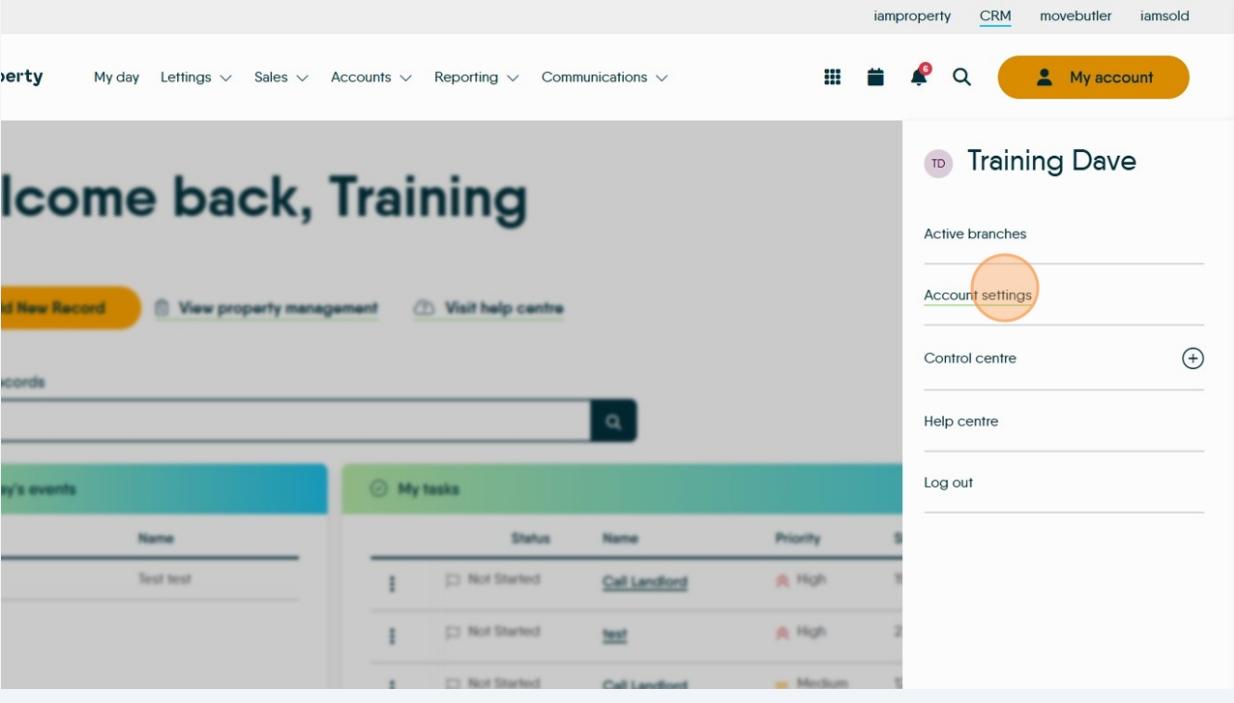
2 Click "My Account"



The screenshot shows the software's main dashboard. At the top, there are navigation links: 'My day', 'Lettings', 'Sales', 'Accounts', 'Reporting', and 'Communications'. On the right side, there are icons for 'iamproperty', 'CRM', 'movebutler', and 'iamsold'. Below these, there are buttons for 'Add New Record', 'View property management', and 'Visit help centre'. A search bar is also present. The main content area features a section titled 'My events' and 'My tasks'. The 'My tasks' section is highlighted with a green gradient background and contains a table with the following data:

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

3 Click "Account settings"



The screenshot shows the same software interface as the previous one, but with a different view. The 'My account' button is now highlighted with an orange circle. On the right side, there is a sidebar with the following options: 'Active branches', 'Account settings' (which is highlighted with an orange circle), 'Control centre', 'Help centre', and 'Log out'. The main content area is identical to the previous screenshot, showing the 'My events' and 'My tasks' sections with the same data as the first screenshot.

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 ▾

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

Mr

Forename

Training

Surname

Dave

User name (Optional)



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

**iamproperty** CRM movebutler

User name (Optional)

Davidmorgan

Email Address

david.morgan@iamproperty.com

Phone (Optional)

01865 860 873

Mobile Phone (Optional)

0 / 15

Work phone (Optional)

01865 860 873

13 / 15

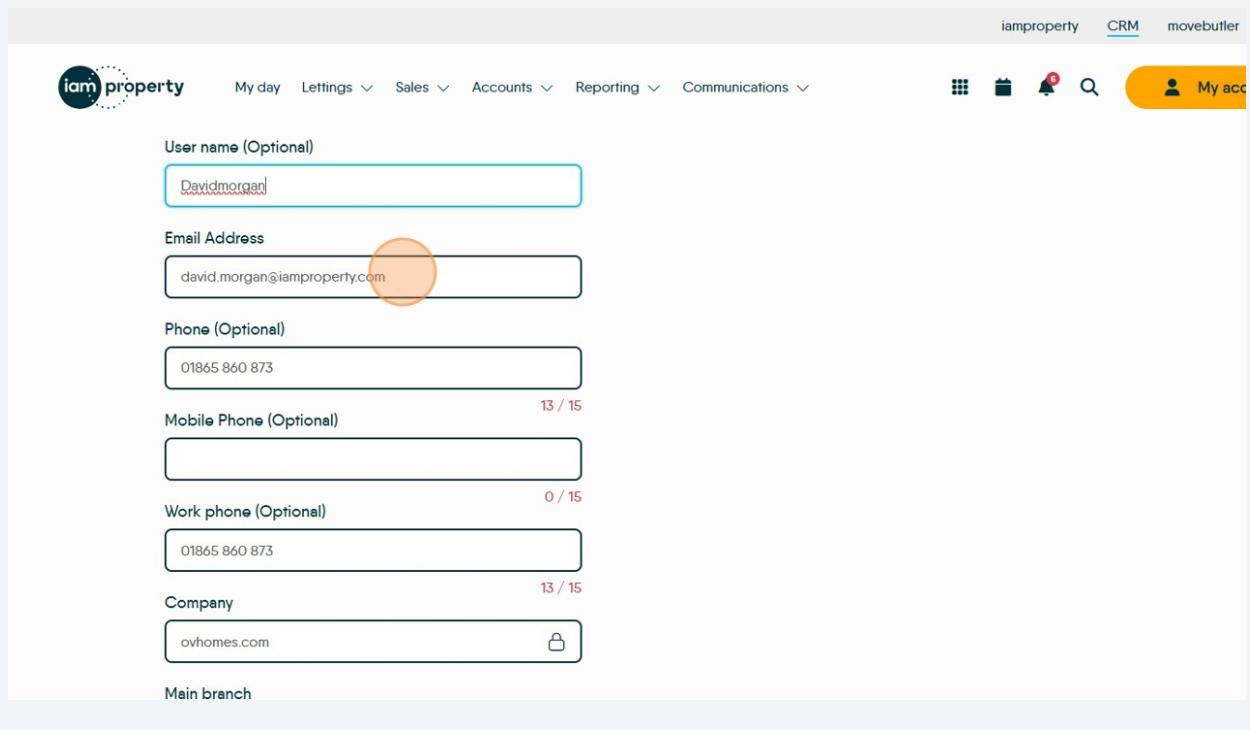
Company

ovhomes.com

>Main branch



8 Click the "Email Address" field.



User name (Optional)  
Davidmorgan

Email Address  
david.morgan@iamproperty.com

Phone (Optional)  
01865 860 873  
13 / 15

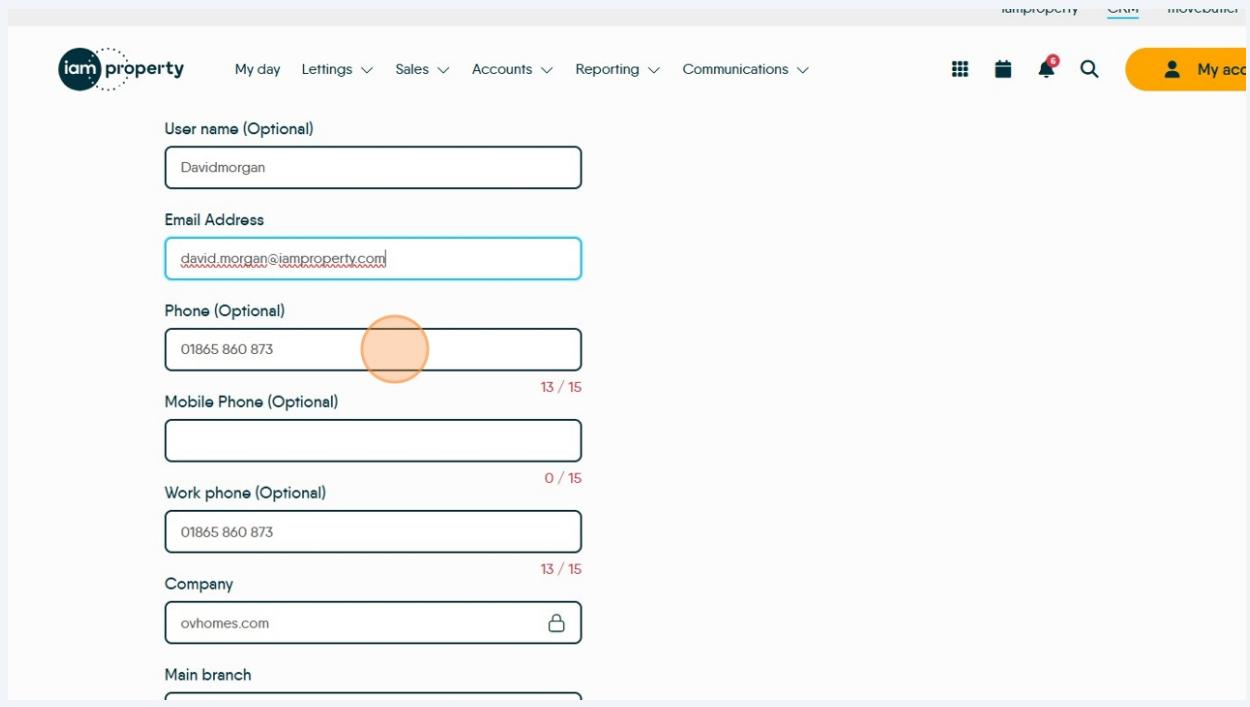
Mobile Phone (Optional)  
   
0 / 15

Work phone (Optional)  
01865 860 873  
13 / 15

Company  
ovhomes.com 

Main branch

9 Click the "Phone" field.



User name (Optional)  
Davidmorgan

Email Address  
david.morgan@iamproperty.com

Phone (Optional)  
01865 860 873

Mobile Phone (Optional)  
   
0 / 15

Work phone (Optional)  
01865 860 873  
13 / 15

Company  
ovhomes.com 

Main branch

10 Click the "Mobile Phone" field.

User name (Optional)  
Davidmorgan

Email Address  
david.morgan@iamproperty.com

Phone (Optional)  
01865 860 873 13 / 15

Mobile Phone (Optional)  
0 / 15

Work phone (Optional)  
01865 860 873 13 / 15

Company  
ovhomes.com

Main branch  
Morgan & Co

11 Click the "Work phone" field.

User name (Optional)  
Davidmorgan

Email Address  
david.morgan@iamproperty.com

Phone (Optional)  
01865 860 873 13 / 15

Mobile Phone (Optional)  
0 / 15

Work phone (Optional)  
01865 860 873 13 / 15

Company  
ovhomes.com

Main branch  
Morgan & Co

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 13 / 15

Mobile Phone (Optional)  
01865 860 873 0 / 15

Work phone (Optional)  
01865 860 873 13 / 15

Company  
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 13 / 15

Mobile Phone (Optional)  
01865 860 873 0 / 15

Work phone (Optional)  
01865 860 873 13 / 15

Company  
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  
13 / 15

Mobile Phone (Optional)

Work phone (Optional)  
01865 860 873  
13 / 15

Company  
ovhomes.com

Main branch  
Morgan & Co

**Save Personal Details**