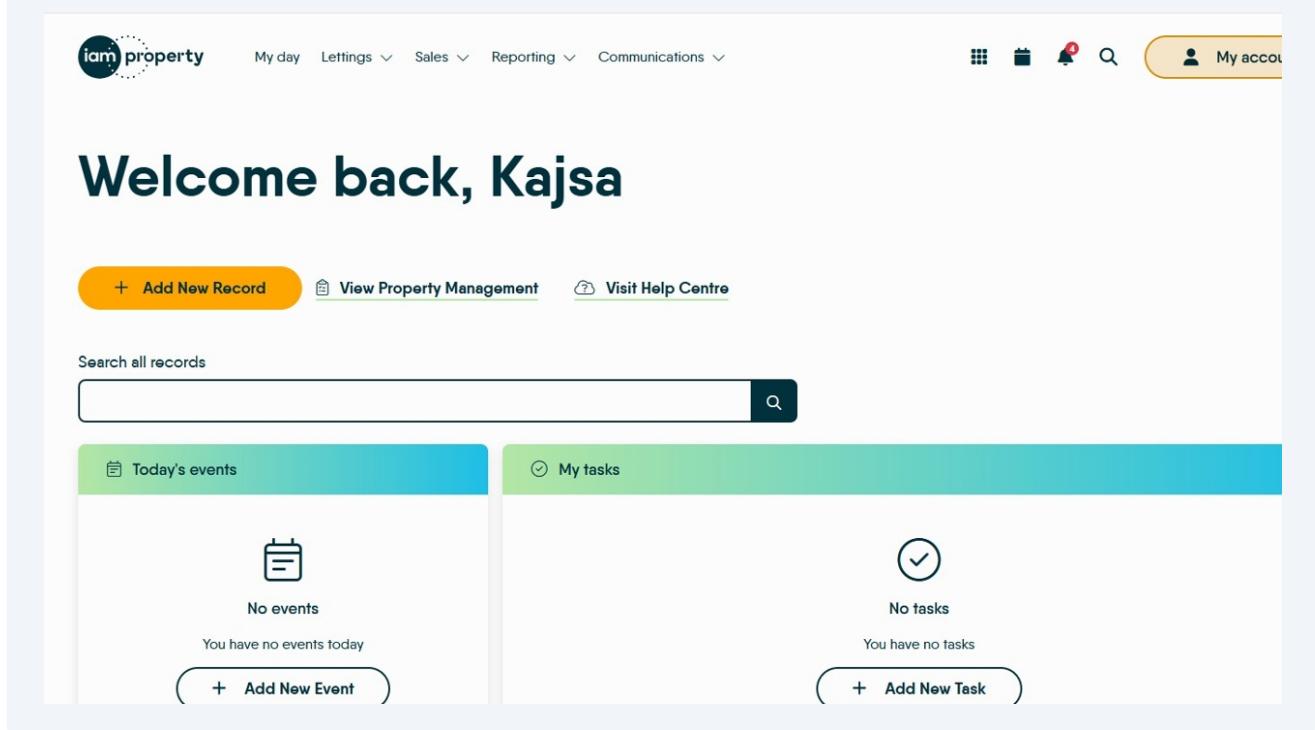


# Configuring SMTP Settings in iamproperty CRM



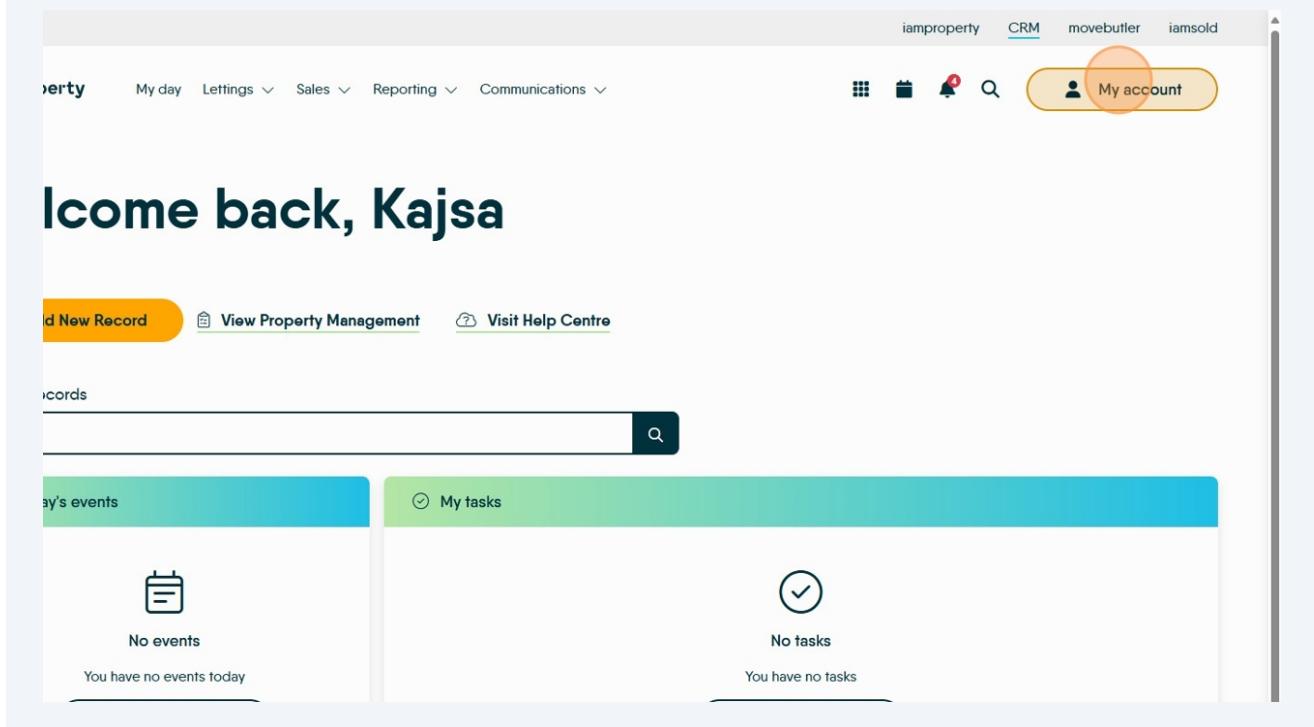
This guide is essential for anyone looking to configure SMTP settings in CRM efficiently. It provides a straightforward, step-by-step approach to ensure your email system is properly integrated, allowing for seamless communication. By following these instructions, users can easily set up their email host, verify configurations, and test functionality, ultimately enhancing their CRM experience. Whether you're an end-user or working with IT, this guide simplifies the process, promoting effective email management.

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

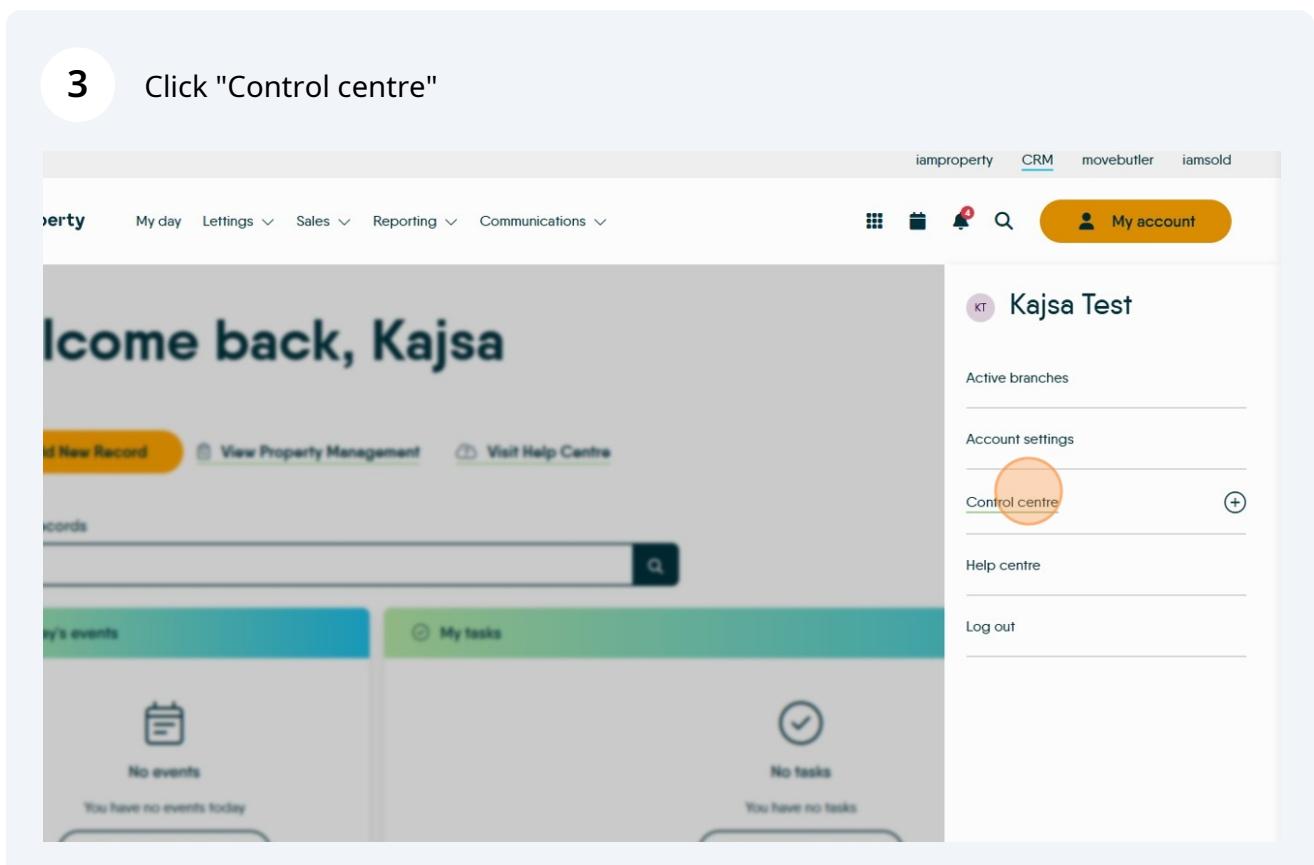


The screenshot shows the 'My Day' dashboard of the iamproperty CRM. At the top, there is a navigation bar with the 'iam property' logo, 'My day', 'Lettings', 'Sales', 'Reporting', 'Communications', and a 'My account' button. Below the navigation bar, a welcome message 'Welcome back, Kajsa' is displayed. There are three main sections: 'Today's events' (No events, Add New Event), 'My tasks' (No tasks, Add New Task), and a search bar. At the bottom, there are links to 'Add New Record', 'View Property Management', and 'Visit Help Centre'.

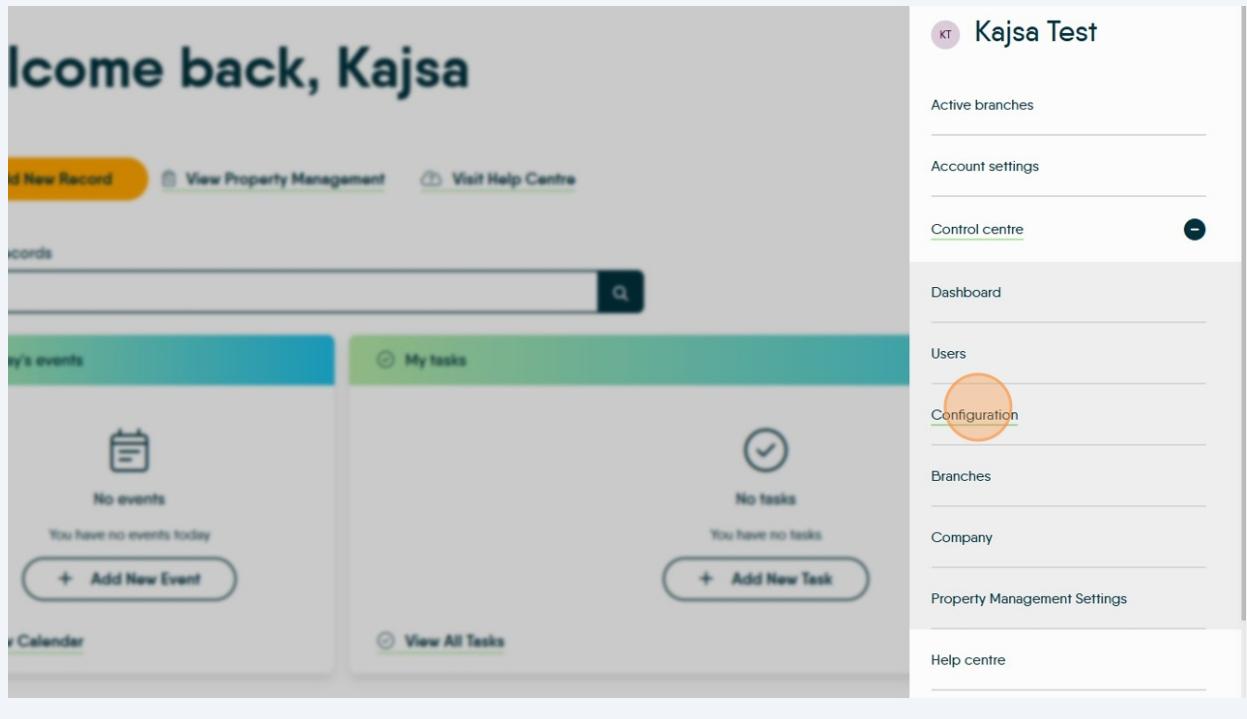
2 Click "My Account"



3 Click "Control centre"

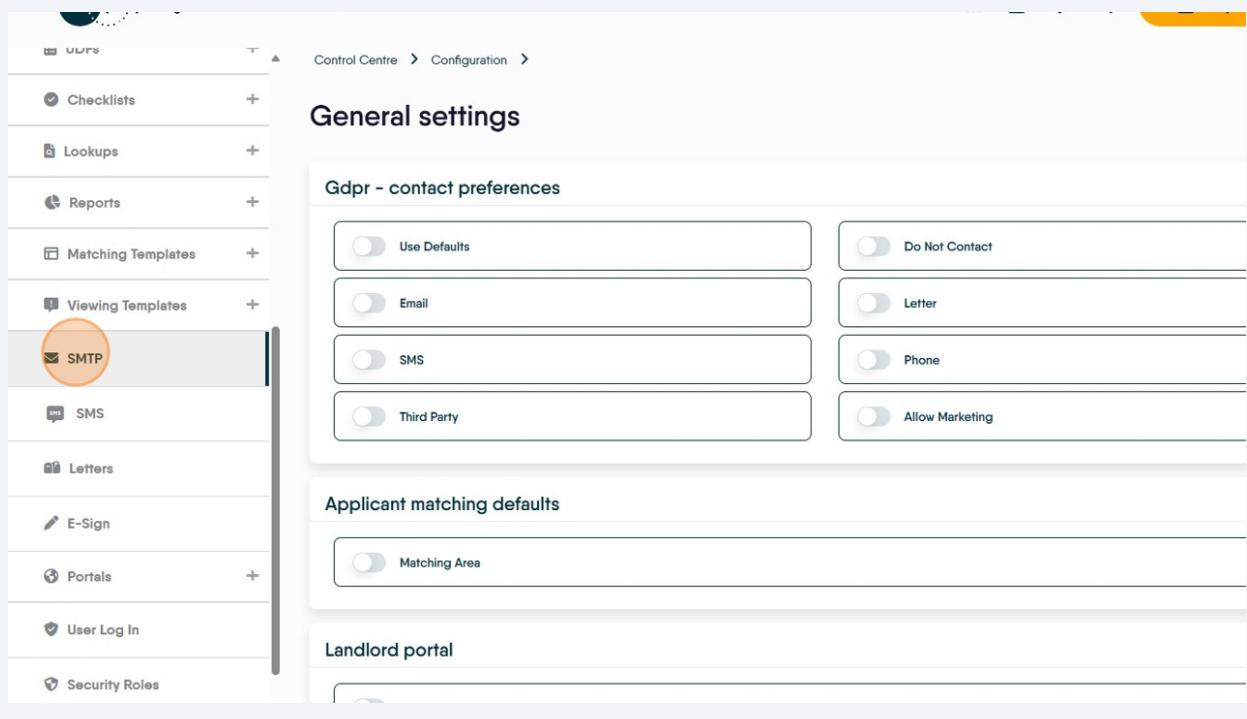


4 Click "Configuration"



The screenshot shows the 'Control centre' section of the dashboard. On the left, there are two main sections: 'My events' (No events, Add New Event) and 'My tasks' (No tasks, Add New Task). On the right, a sidebar lists various options: Active branches, Account settings, Control centre (which is the current section, indicated by a green underline and an orange circle), Dashboard, Users, Branches, Company, Property Management Settings, and Help centre.

5 Click "SMTP"

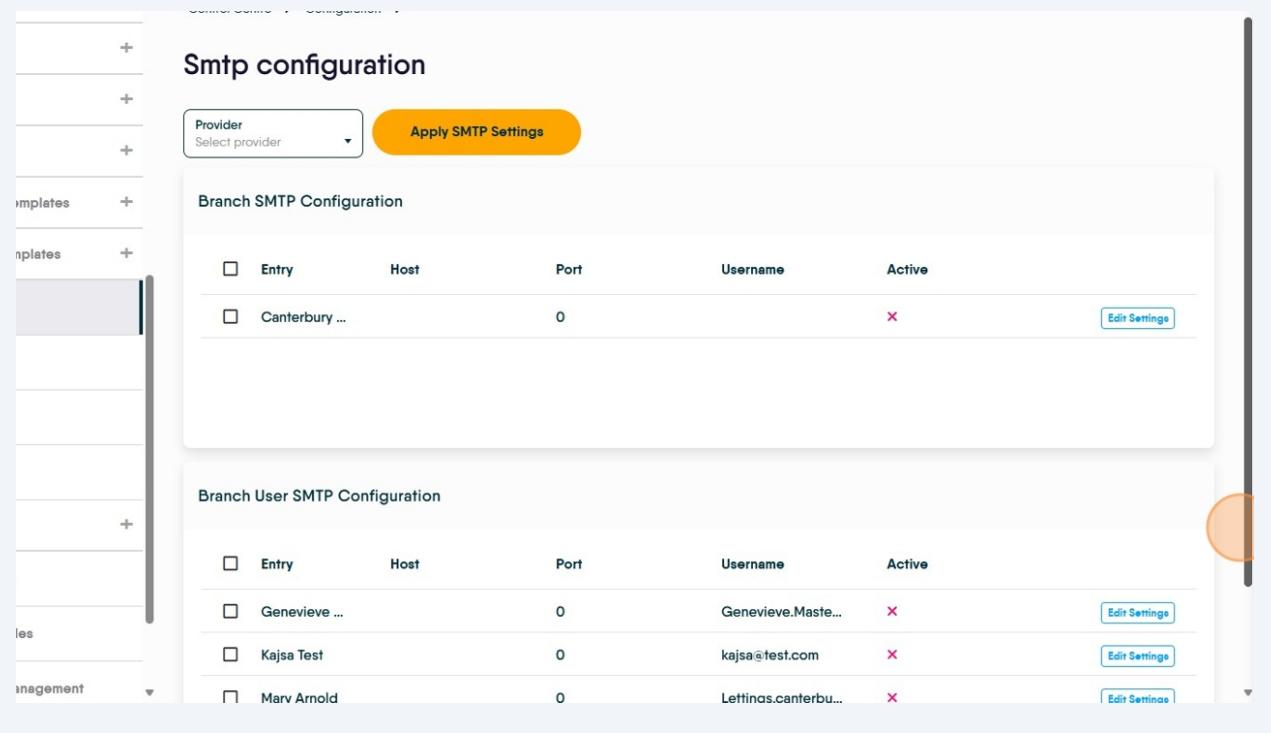


The screenshot shows the 'General settings' page under the 'Configuration' section. On the left, a sidebar lists various configuration categories: Users, Checklists, Lookups, Reports, Matching Templates, Viewing Templates, SMTP (which is highlighted with an orange circle), SMS, Letters, E-Sign, Portals, User Log In, and Security Roles. The main content area is titled 'General settings' and contains sections for 'Gdpr - contact preferences' (with options for Use Defaults, Do Not Contact, Email, Letter, SMS, Phone, Third Party, and Allow Marketing), 'Applicant matching defaults' (with a Matching Area toggle), and 'Landlord portal' (with a dropdown menu).

6

This is the email configuration screen. From this screen you can add the email host you use (e.g. smtp.office365.com) and the port number.

This information is in the configuration of your current email system, alternatively speak with your IT provider/department.

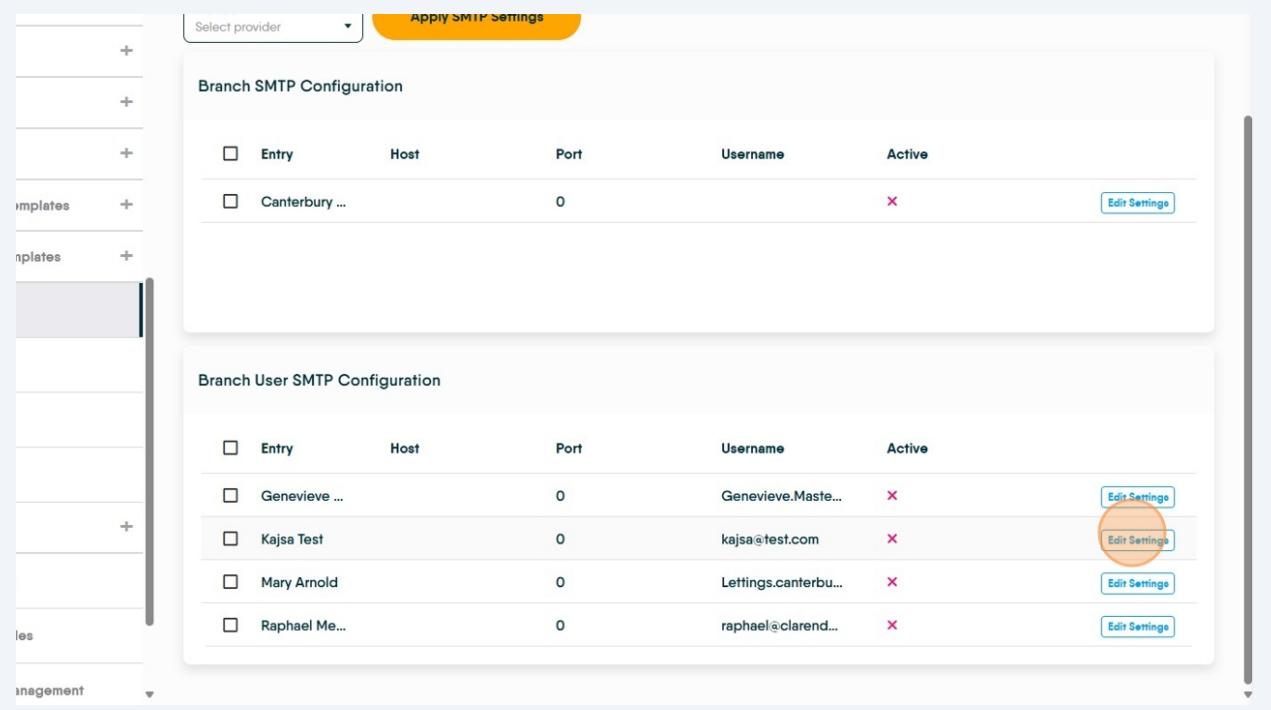


The screenshot shows the 'Smtp configuration' screen with the following interface elements:

- Header:** 'Smtp configuration' with a 'Provider' dropdown set to 'Select provider' and an 'Apply SMTP Settings' button.
- Branch SMTP Configuration:** A table with columns: Entry, Host, Port, Username, and Active. It shows one entry: 'Canterbury ...' with Host '0' and Active status marked with an 'X'. An 'Edit Settings' button is to the right.
- Branch User SMTP Configuration:** A table with columns: Entry, Host, Port, Username, and Active. It shows four entries: 'Genevieve ...' (Host 0, Active X, Edit Settings), 'Kajsa Test' (Host 0, Active X, Edit Settings), 'Marv Arnold' (Host 0, Active X, Edit Settings), and 'Letfinas.canterbu...' (Host 0, Active X, Edit Settings). The 'Edit Settings' button for the fourth entry is highlighted with an orange circle.

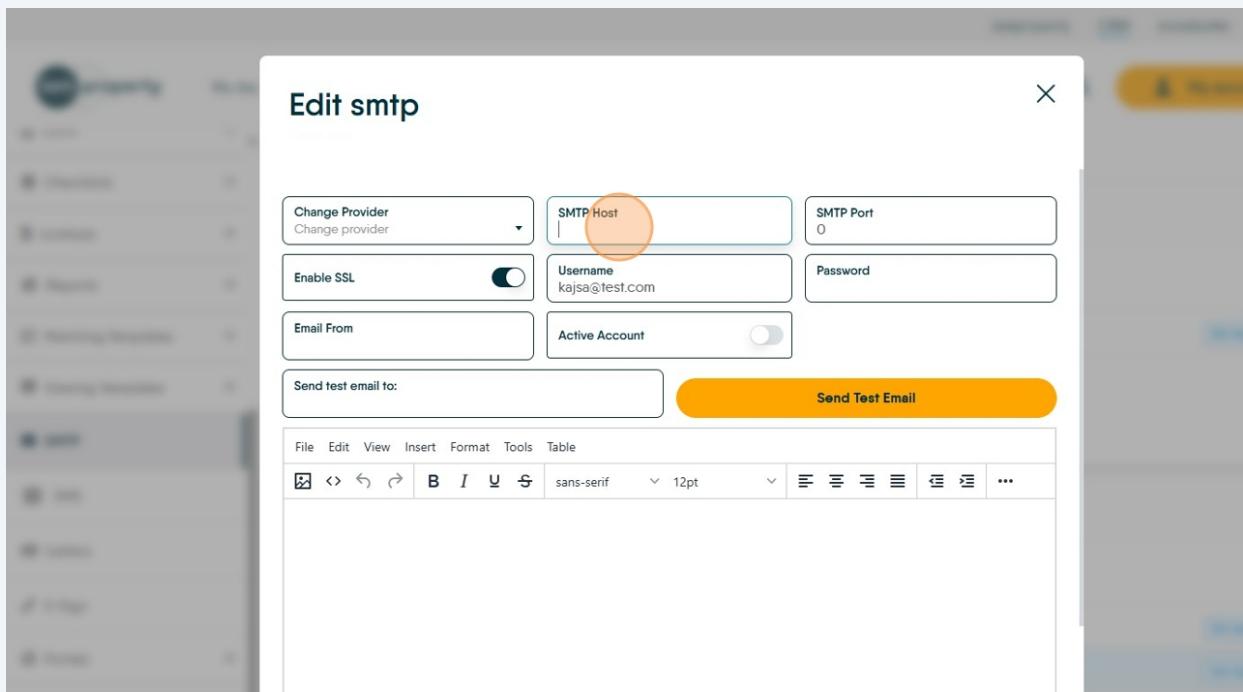
7

Click "Edit Settings"

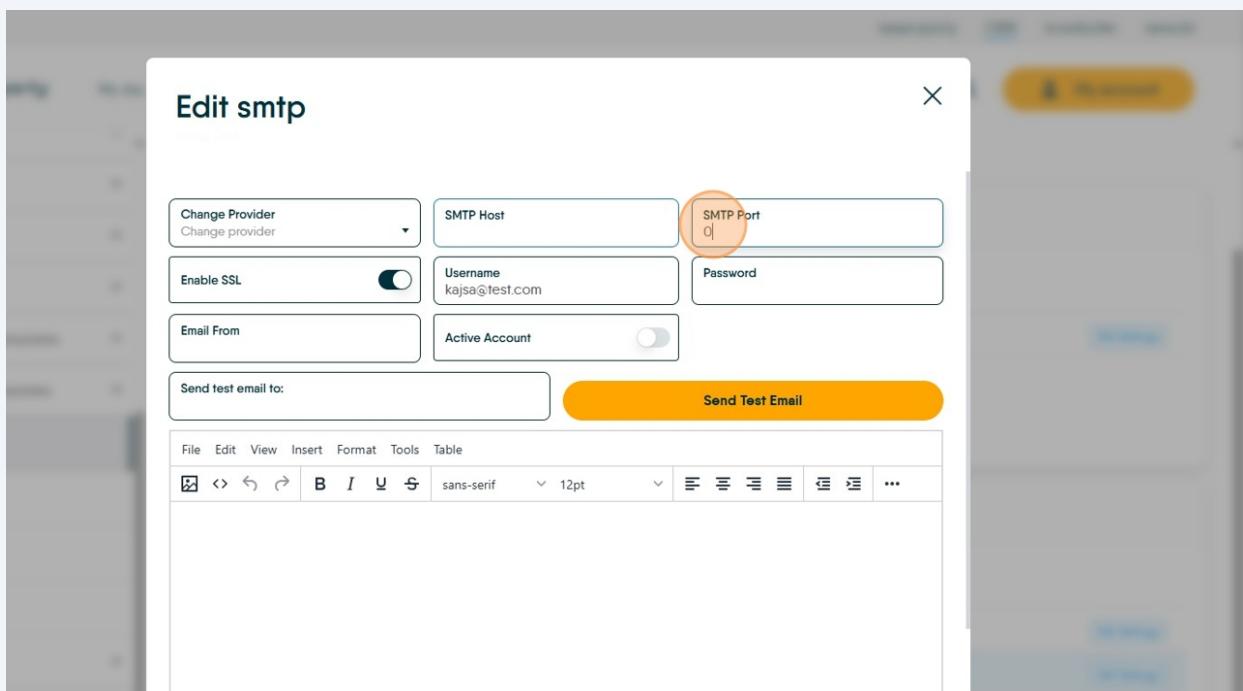


The screenshot shows the 'Smtp configuration' screen with the 'Edit Settings' button for the fourth user entry highlighted with an orange circle. The interface is identical to the previous screenshot, but the 'Edit Settings' button for the fourth entry in the 'Branch User SMTP Configuration' table is circled in orange.

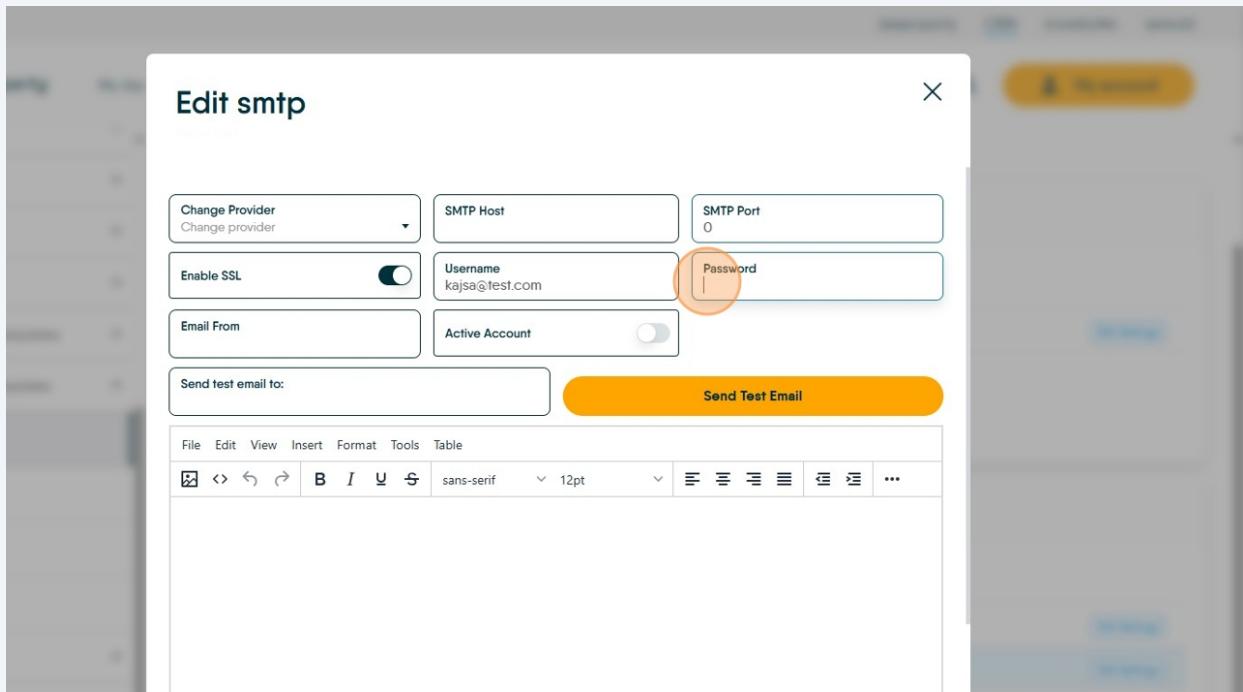
8 Click the "SMTP Host" field.



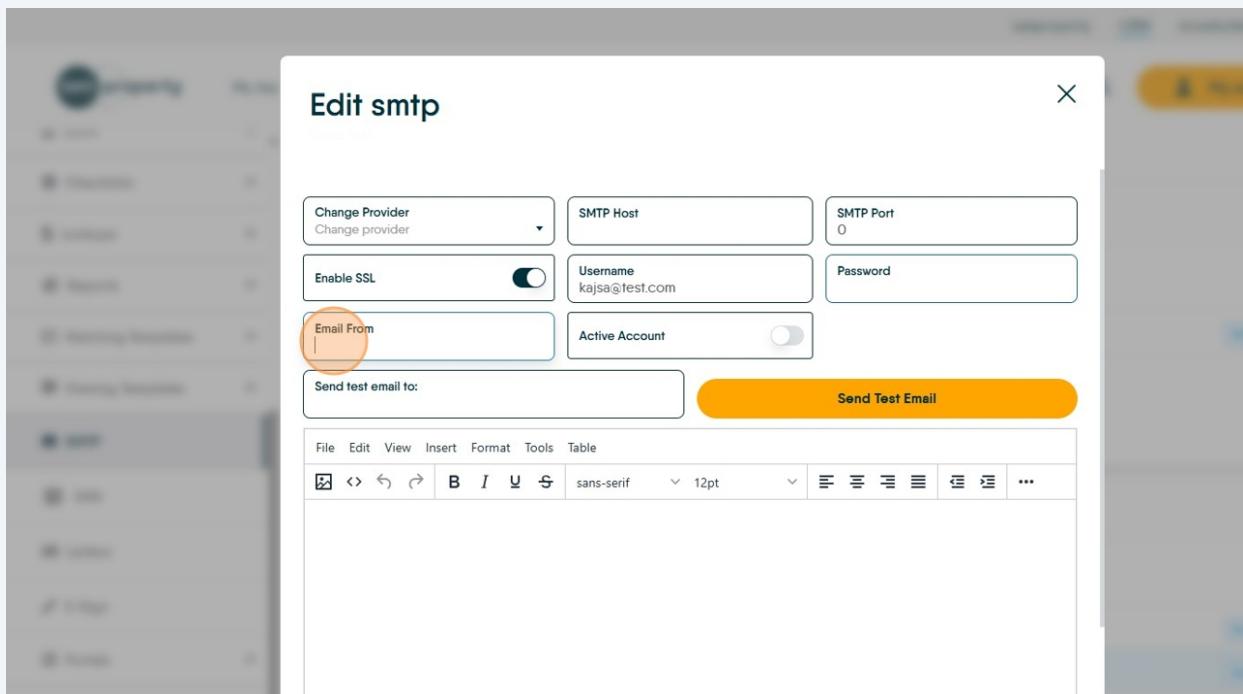
9 Click the "SMTP Port" field.



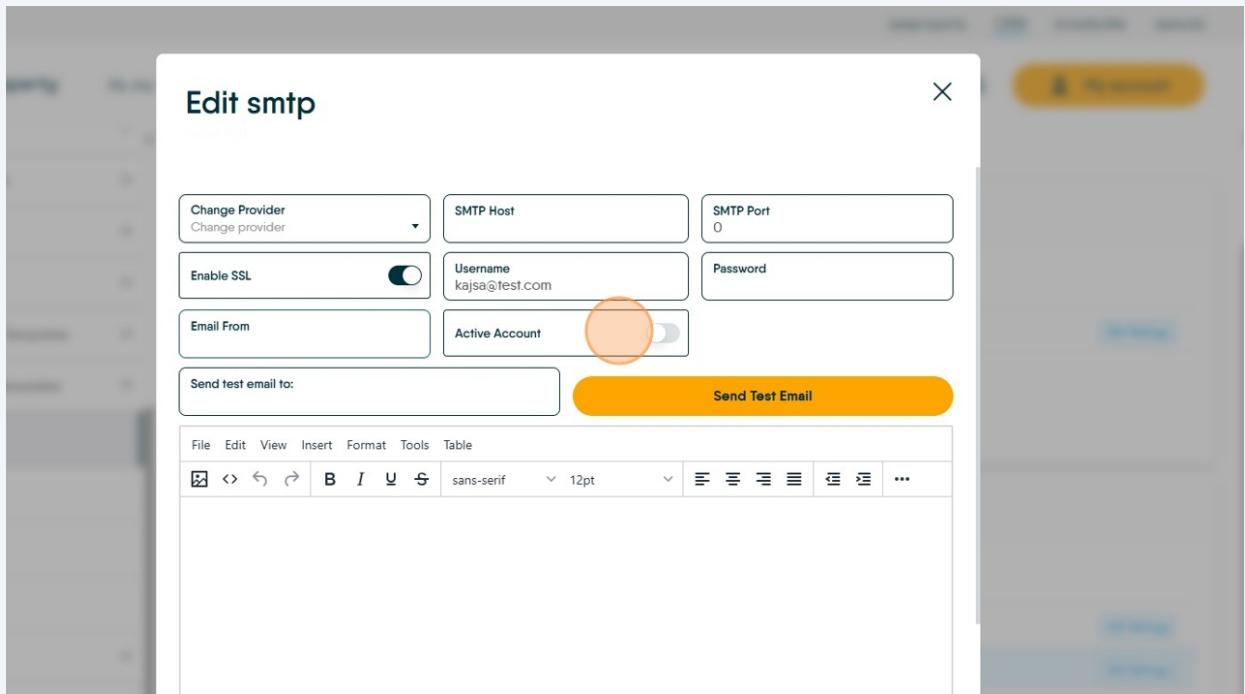
10 Click the "Password" field.



11 Click the "Email From" field and add the email address replies are to be sent to, usually this would be your own email address.

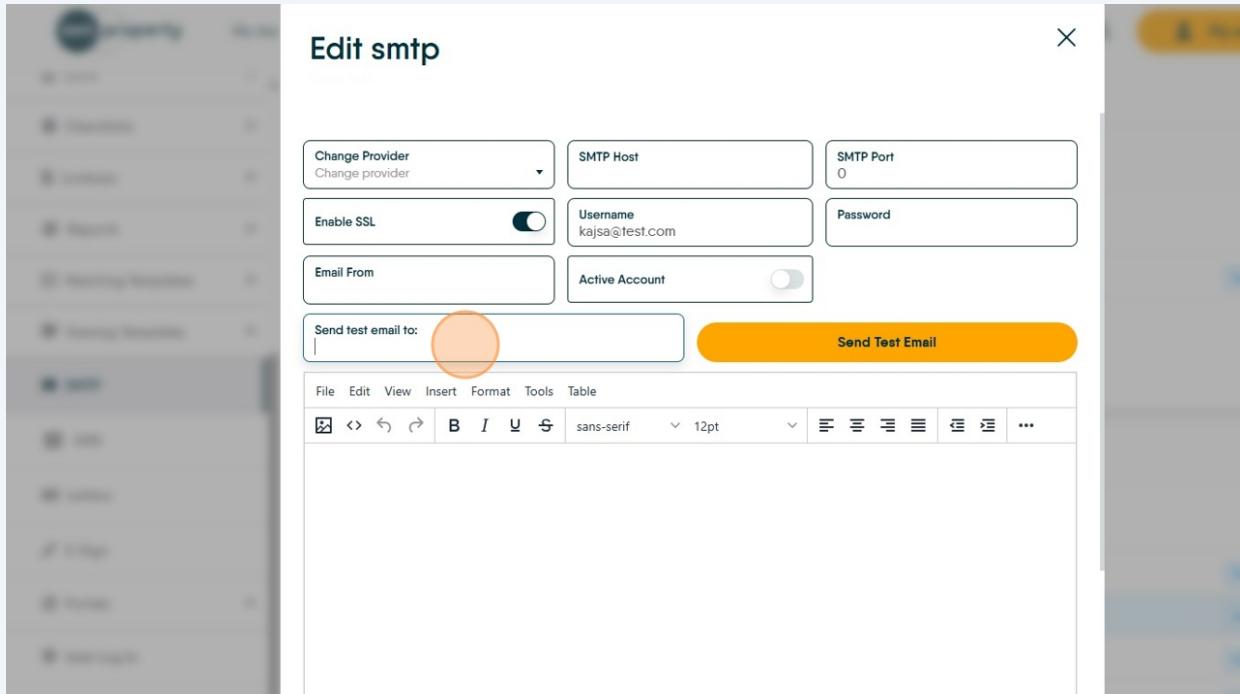


12 Click here.

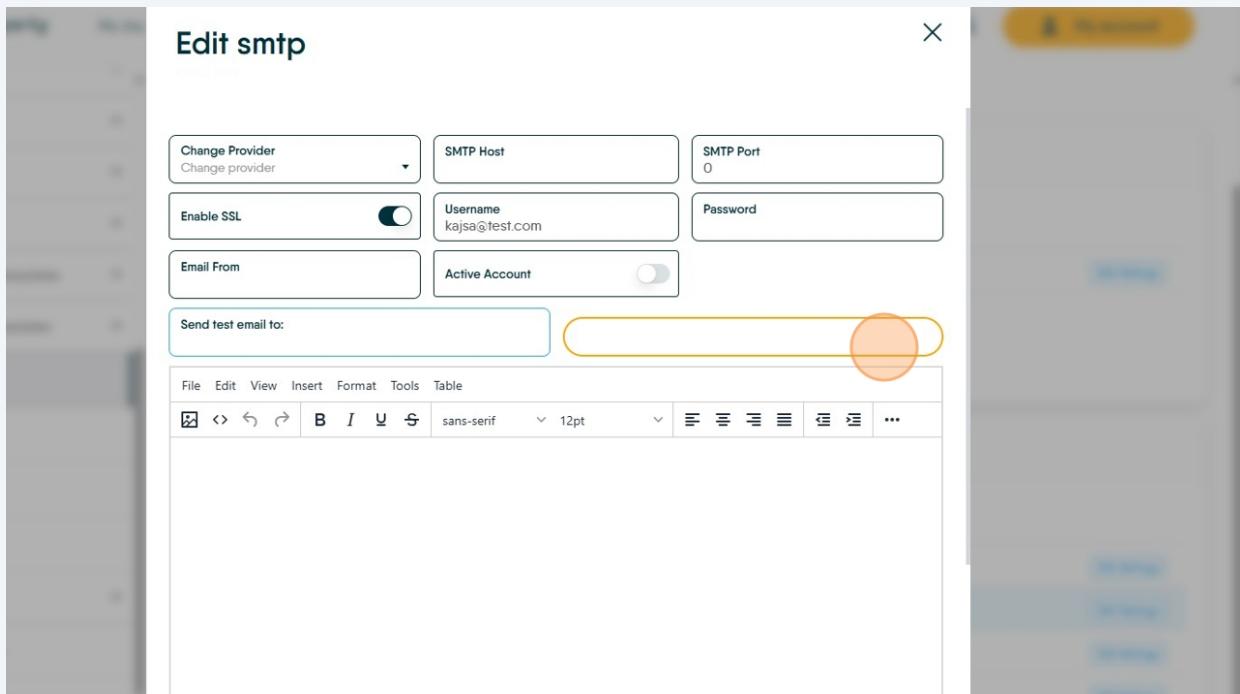


## Testing the Settings

13 Click the "Send test email to:" field. Type in an email address for the test email to be sent to.



14 Click "Send Test Email"



15 Click here.

