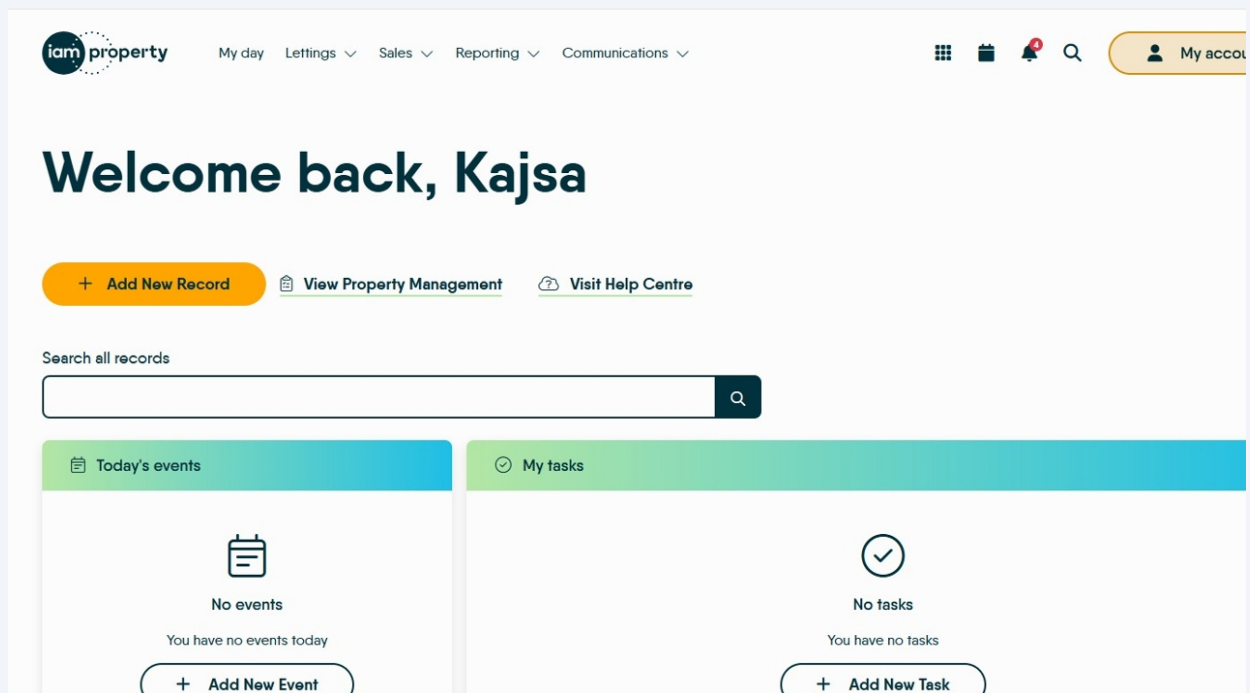


Configuring SMTP Settings in iamproperty CRM

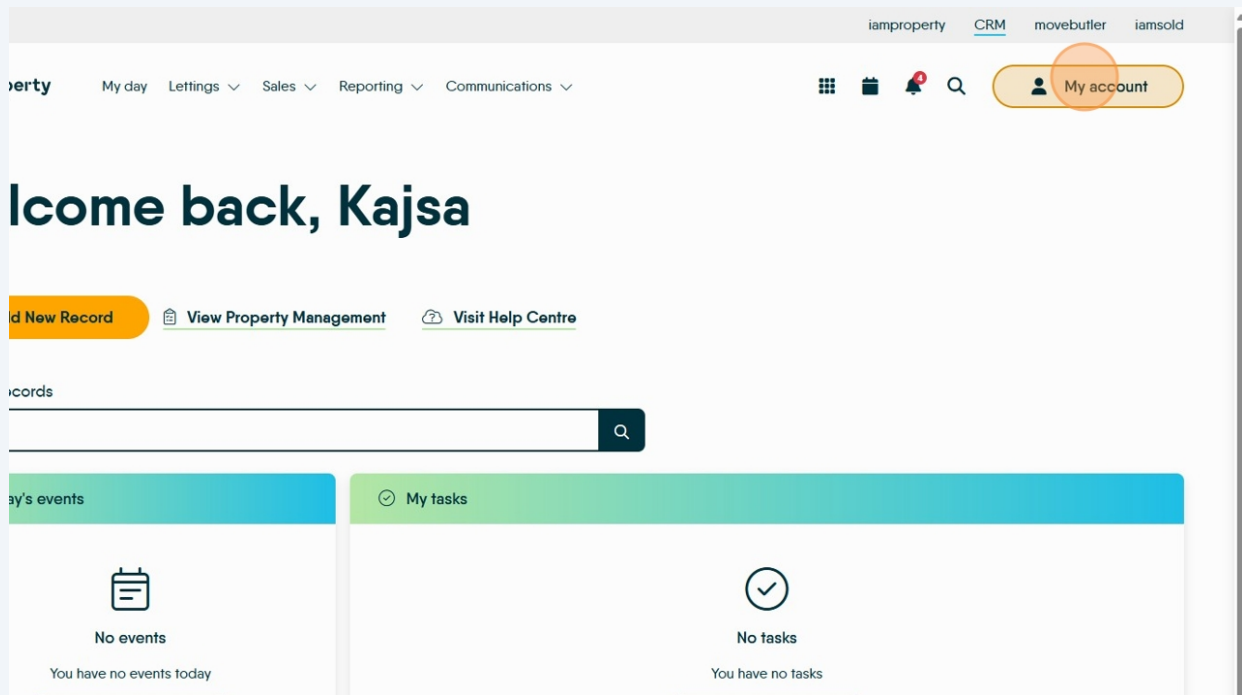


This guide is essential for anyone looking to configure SMTP settings in CRM efficiently. It provides a straightforward, step-by-step approach to ensure your email system is properly integrated, allowing for seamless communication. By following these instructions, users can easily set up their email 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.

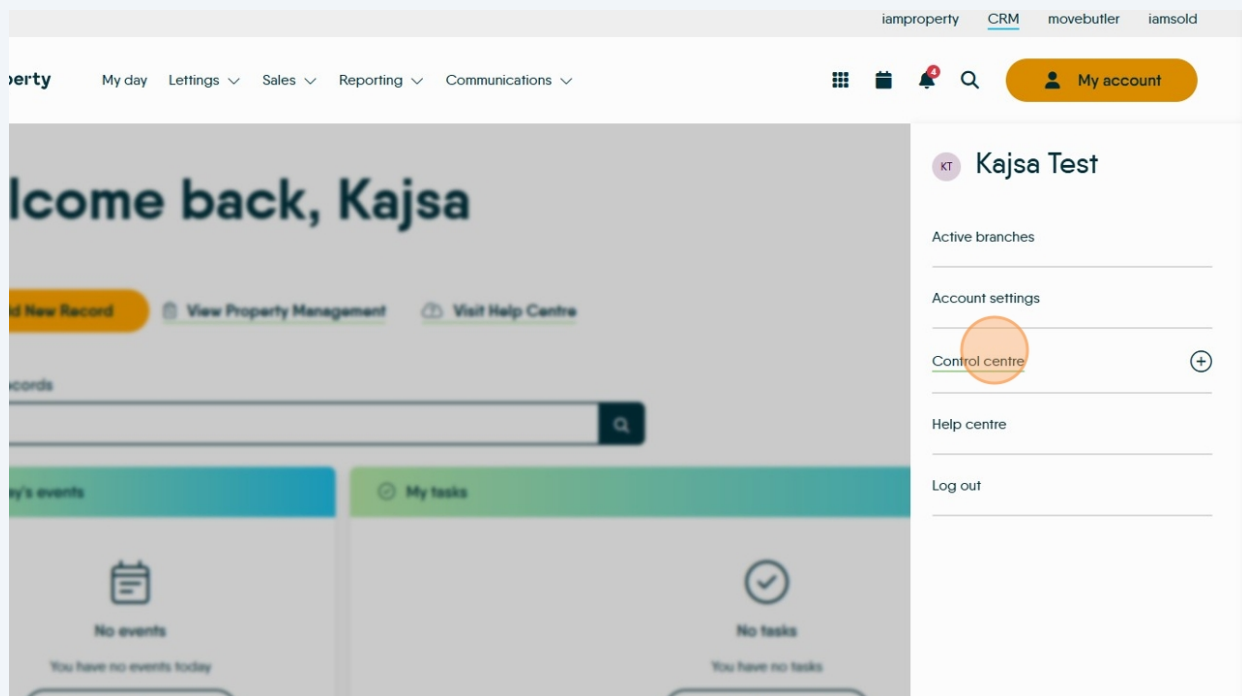
1 Navigate to <https://crm.iamproperty.com/MyDay>



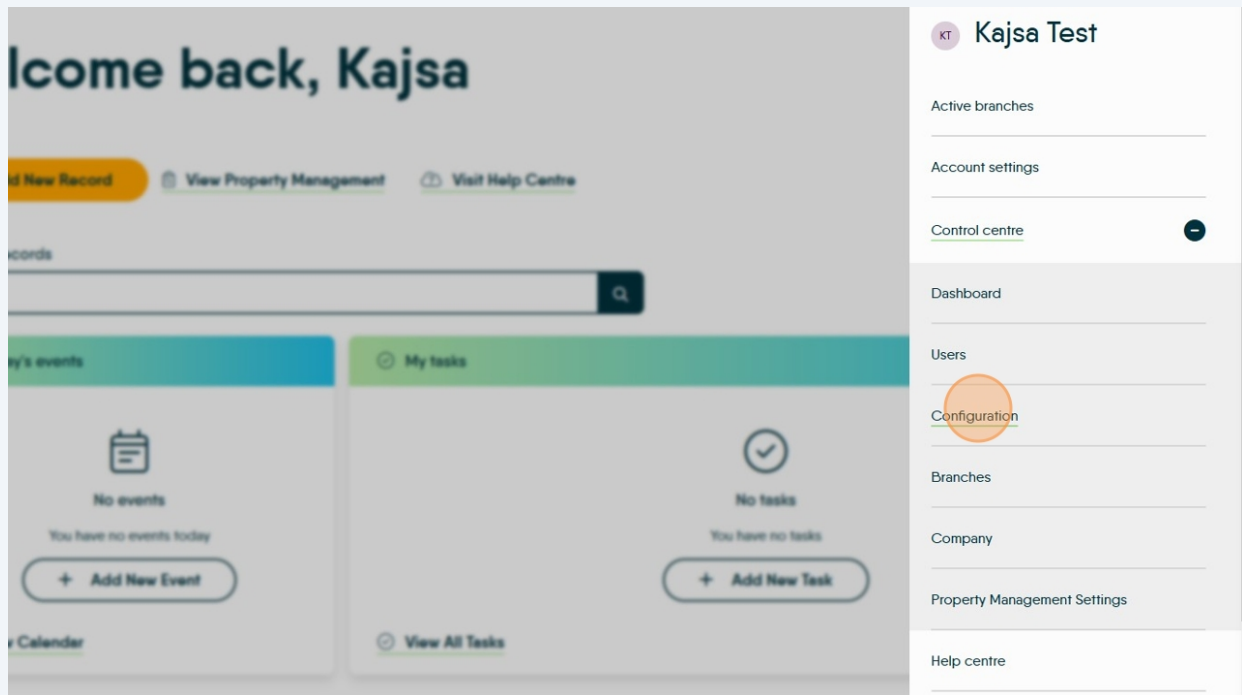
2 Click "My Account"



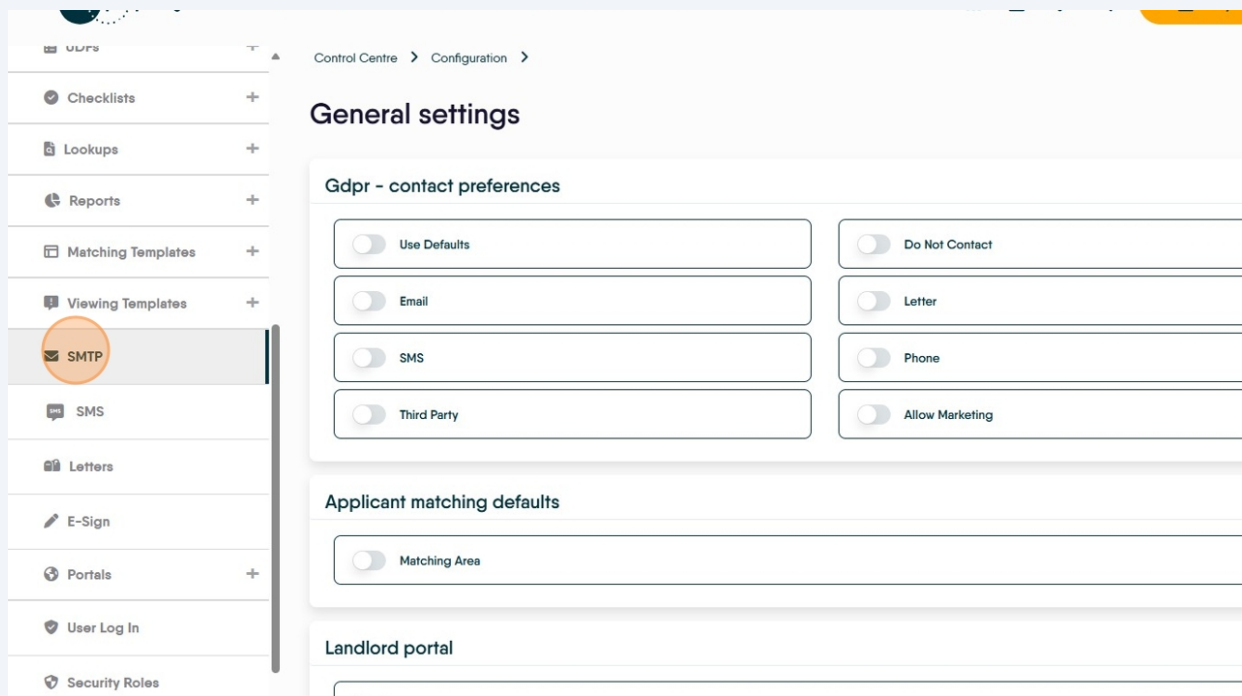
3 Click "Control centre"



4 Click "Configuration"



5 Click "SMTP"



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.

Smtp configuration

Provider: Select provider Apply SMTP Settings

Branch SMTP Configuration

Entry	Host	Port	Username	Active
<input type="checkbox"/> Canterbury ...		0		×

Edit Settings

Branch User SMTP Configuration

Entry	Host	Port	Username	Active
<input type="checkbox"/> Genevieve ...		0	Genevieve.Maste...	×
<input type="checkbox"/> Kajsa Test		0	kajsa@test.com	×
<input type="checkbox"/> Mary Arnold		0	Lettings.canterbu...	×
<input type="checkbox"/> Raphael Me...		0	raphael@clarend...	×

Edit Settings Edit Settings Edit Settings Edit Settings

7

Click "Edit Settings"

Smtp configuration

Provider: Select provider Apply SMTP Settings

Branch SMTP Configuration

Entry	Host	Port	Username	Active
<input type="checkbox"/> Canterbury ...		0		×

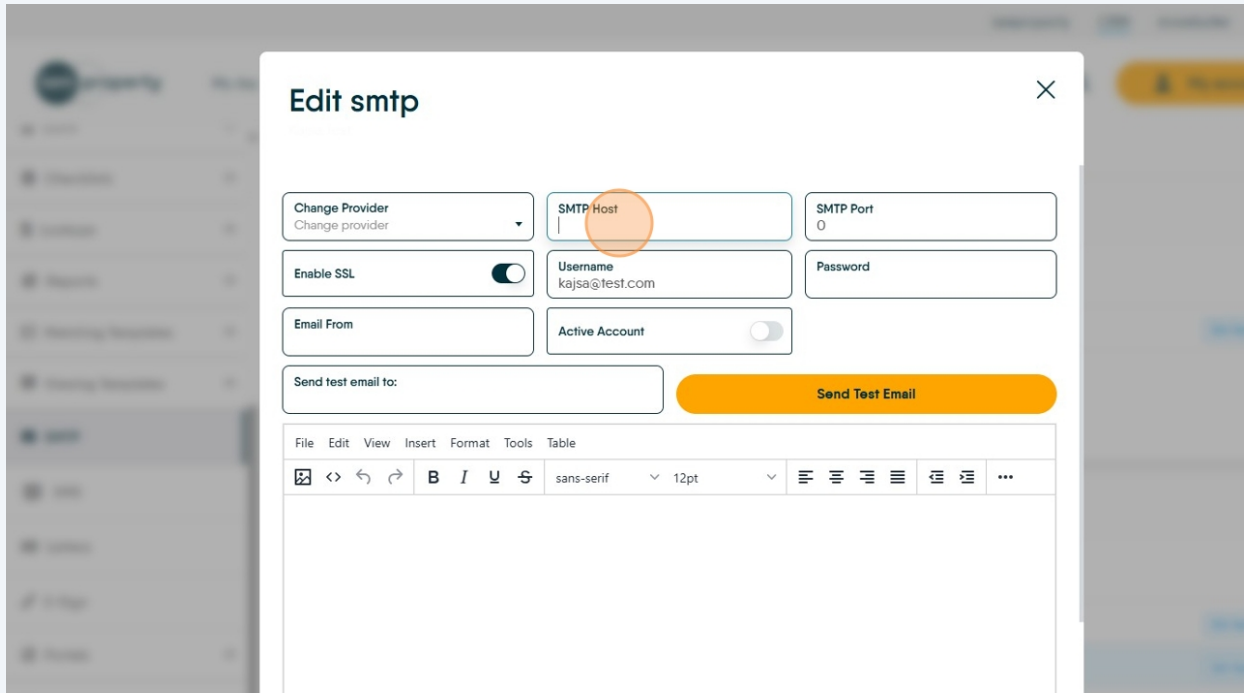
Edit Settings

Branch User SMTP Configuration

Entry	Host	Port	Username	Active
<input type="checkbox"/> Genevieve ...		0	Genevieve.Maste...	×
<input type="checkbox"/> Kajsa Test		0	kajsa@test.com	×
<input type="checkbox"/> Mary Arnold		0	Lettings.canterbu...	×
<input type="checkbox"/> Raphael Me...		0	raphael@clarend...	×

Edit Settings Edit Settings Edit Settings Edit Settings

8 Click the "SMTP Host" field.

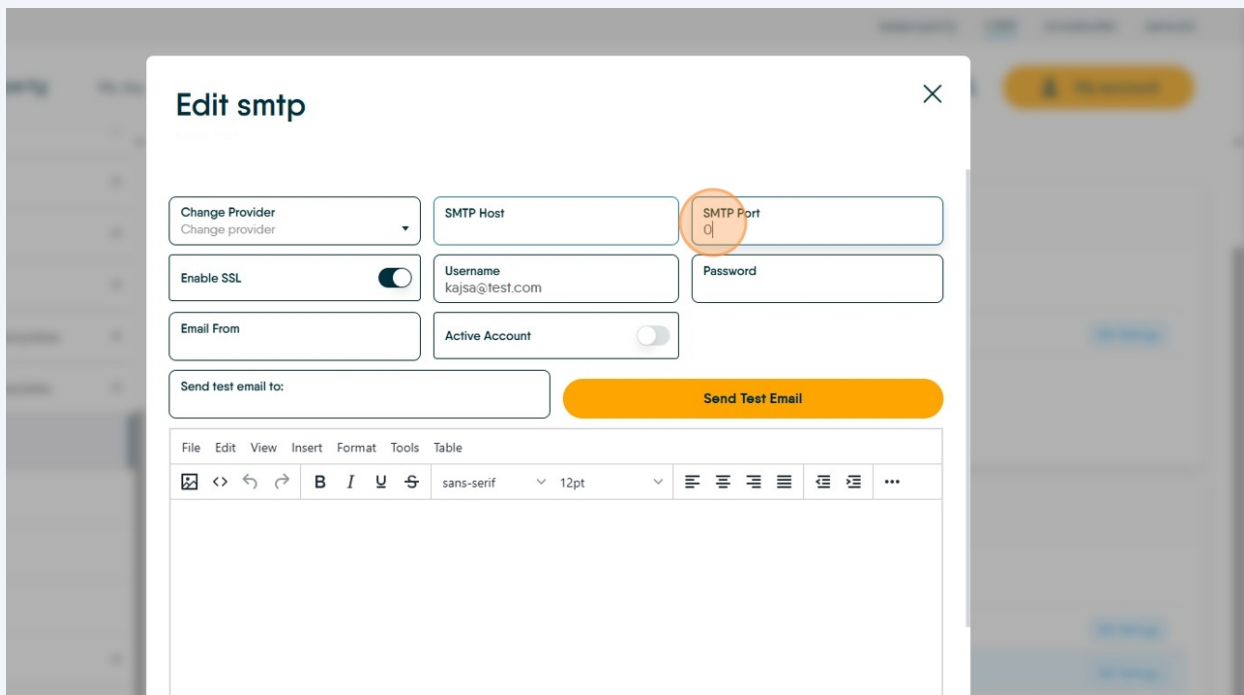


The screenshot shows the 'Edit smtp' dialog box. The 'SMTP Host' field is highlighted with an orange circle. The dialog box contains the following fields and controls:

- Change Provider:** A dropdown menu with the text 'Change provider' below it.
- SMTP Host:** A text input field, currently empty, highlighted with an orange circle.
- SMTP Port:** A text input field containing the value '0'.
- Enable SSL:** A toggle switch that is currently turned on.
- Username:** A text input field containing the value 'kajsa@test.com'.
- Password:** A text input field, currently empty.
- Email From:** A text input field, currently empty.
- Active Account:** A toggle switch that is currently turned off.
- Send test email to:** A text input field, currently empty.
- Send Test Email:** A yellow button.

Below the form fields is a rich text editor with a menu bar (File, Edit, View, Insert, Format, Tools, Table) and a toolbar with various formatting options. The editor is currently empty.

9 Click the "SMTP Port" field.

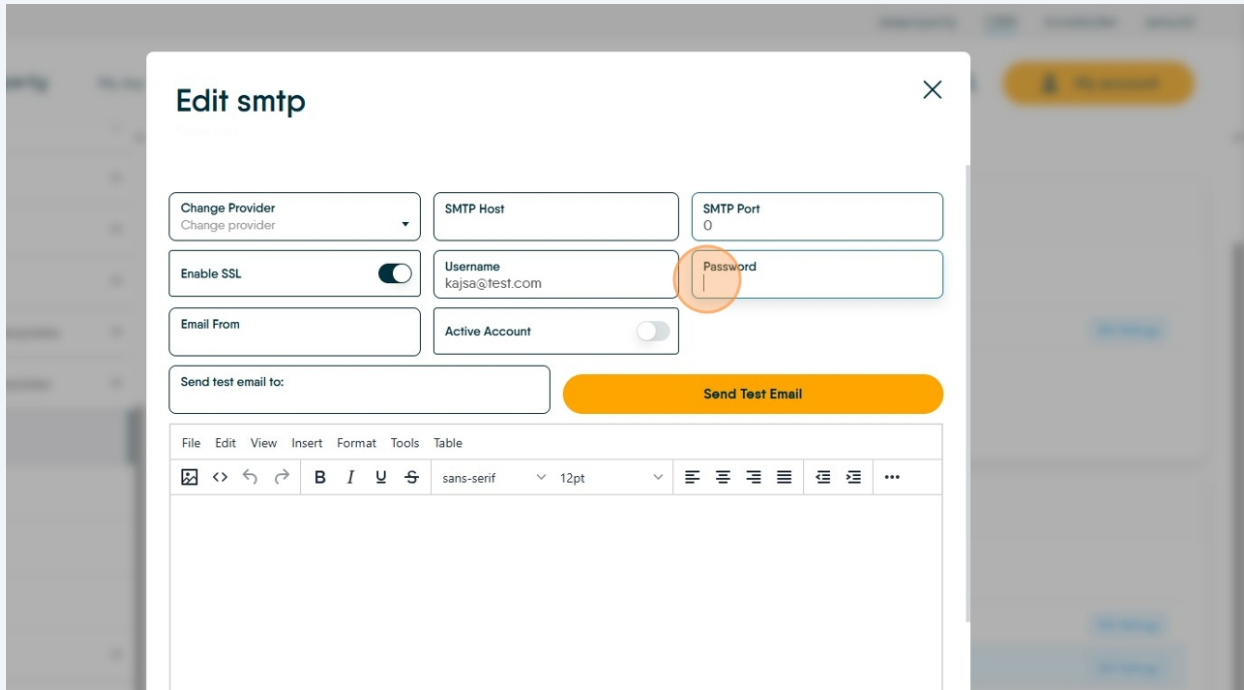


The screenshot shows the 'Edit smtp' dialog box. The 'SMTP Port' field is highlighted with an orange circle. The dialog box contains the following fields and controls:

- Change Provider:** A dropdown menu with the text 'Change provider' below it.
- SMTP Host:** A text input field, currently empty.
- SMTP Port:** A text input field containing the value '0', highlighted with an orange circle.
- Enable SSL:** A toggle switch that is currently turned on.
- Username:** A text input field containing the value 'kajsa@test.com'.
- Password:** A text input field, currently empty.
- Email From:** A text input field, currently empty.
- Active Account:** A toggle switch that is currently turned off.
- Send test email to:** A text input field, currently empty.
- Send Test Email:** A yellow button.

Below the form fields is a rich text editor with a menu bar (File, Edit, View, Insert, Format, Tools, Table) and a toolbar with various formatting options. The editor is currently empty.

- 10 Click the "Password" field.

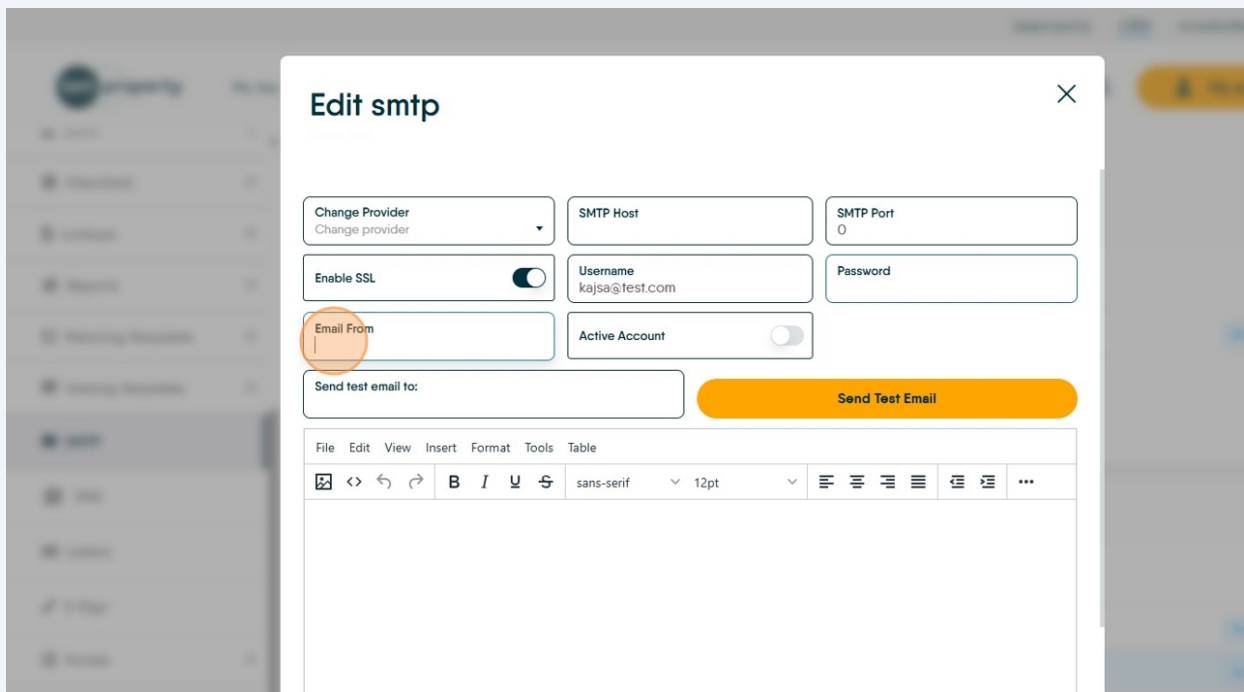


The screenshot shows the 'Edit smtp' dialog box. The 'Password' field is highlighted with an orange circle. The dialog box contains the following fields and controls:

- Change Provider (dropdown menu)
- SMTP Host (text input)
- SMTP Port (text input, value: 0)
- Enable SSL (toggle switch, currently on)
- Username (text input, value: kajsa@test.com)
- Password (text input, highlighted with an orange circle)
- Email From (text input)
- Active Account (toggle switch, currently off)
- Send test email to: (text input)
- Send Test Email (orange button)

Below the form fields is a rich text editor with a menu bar (File, Edit, View, Insert, Format, Tools, Table) and a toolbar with various formatting options.

- 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.

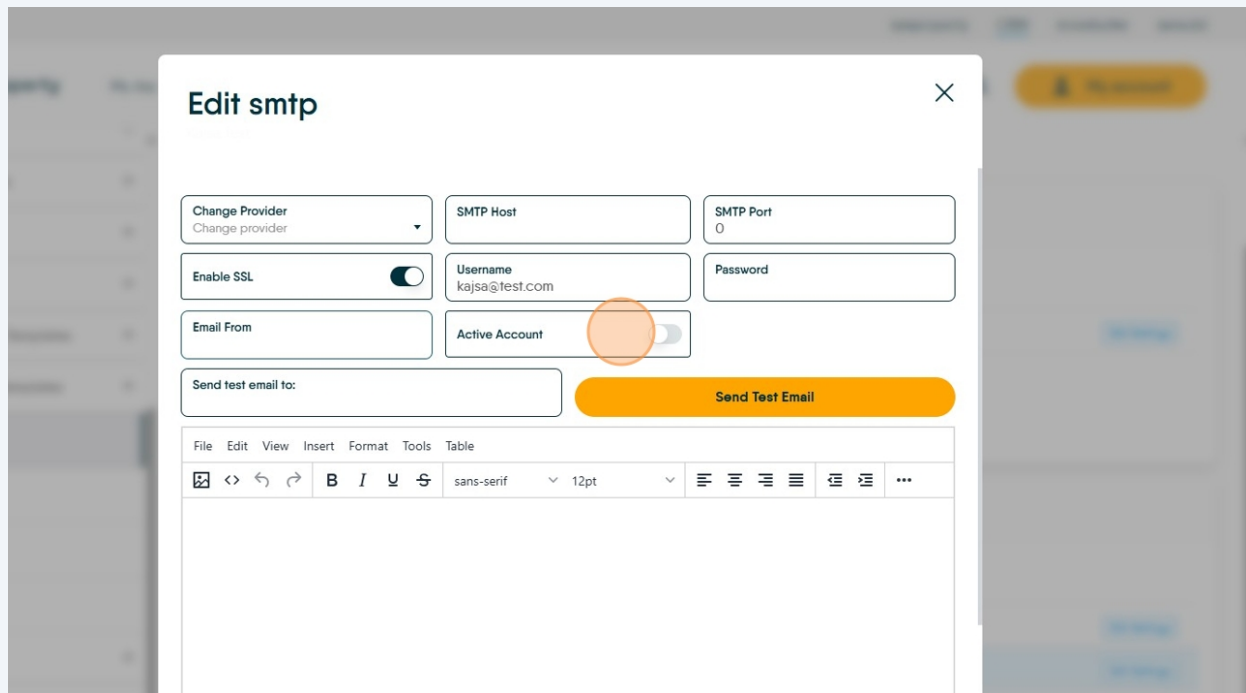


The screenshot shows the 'Edit smtp' dialog box. The 'Email From' field is highlighted with an orange circle. The dialog box contains the following fields and controls:

- Change Provider (dropdown menu)
- SMTP Host (text input)
- SMTP Port (text input, value: 0)
- Enable SSL (toggle switch, currently on)
- Username (text input, value: kajsa@test.com)
- Password (text input)
- Email From (text input, highlighted with an orange circle)
- Active Account (toggle switch, currently off)
- Send test email to: (text input)
- Send Test Email (orange button)

Below the form fields is a rich text editor with a menu bar (File, Edit, View, Insert, Format, Tools, Table) and a toolbar with various formatting options.

12 Click here.

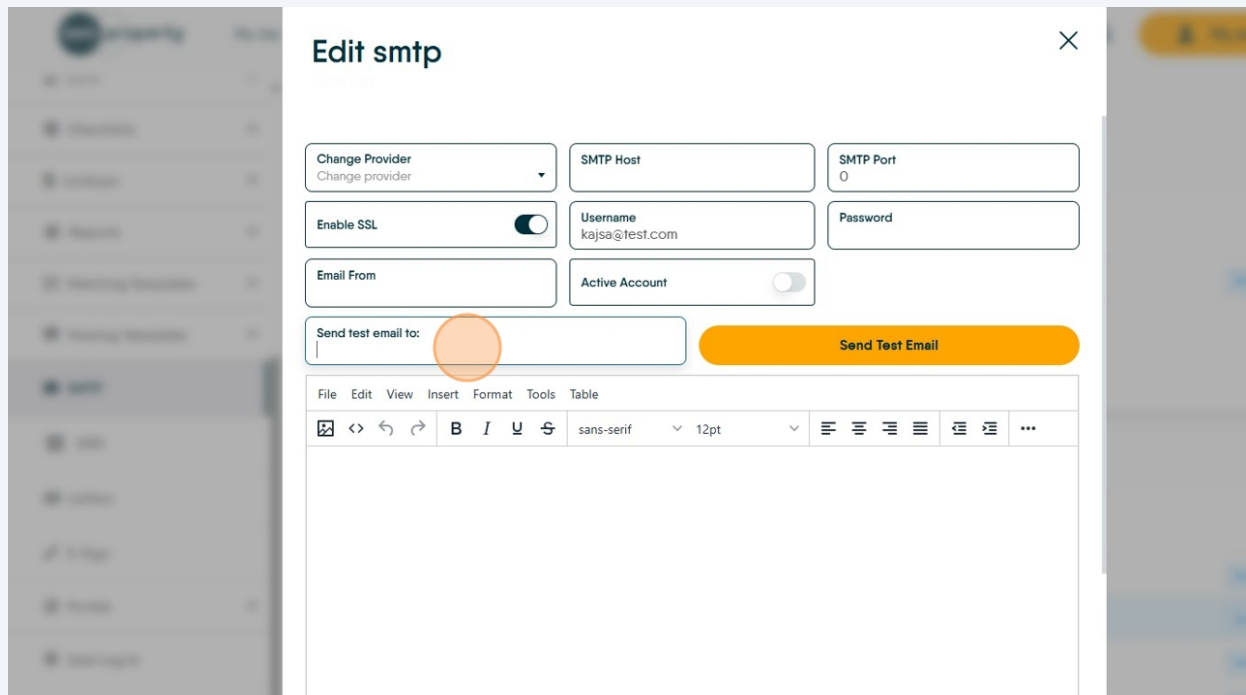


The screenshot shows a web application interface with a modal dialog titled "Edit smtp". The dialog contains several configuration fields: a "Change Provider" dropdown menu, "SMTP Host" and "SMTP Port" text inputs, an "Enable SSL" toggle switch, a "Username" field with the value "kajsa@test.com", a "Password" field, an "Email From" field, and an "Active Account" toggle switch. An orange circle is drawn around the "Active Account" toggle switch, which is currently in the "off" position. Below these fields is a "Send test email to:" text input and a prominent orange "Send Test Email" button. At the bottom of the dialog is a rich text editor with a menu bar (File, Edit, View, Insert, Format, Tools, Table) and a toolbar containing icons for undo, redo, bold, italic, underline, link, text color, background color, bulleted list, numbered list, and more options. The editor's font is set to "sans-serif" and "12pt".

Testing the Settings

13

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



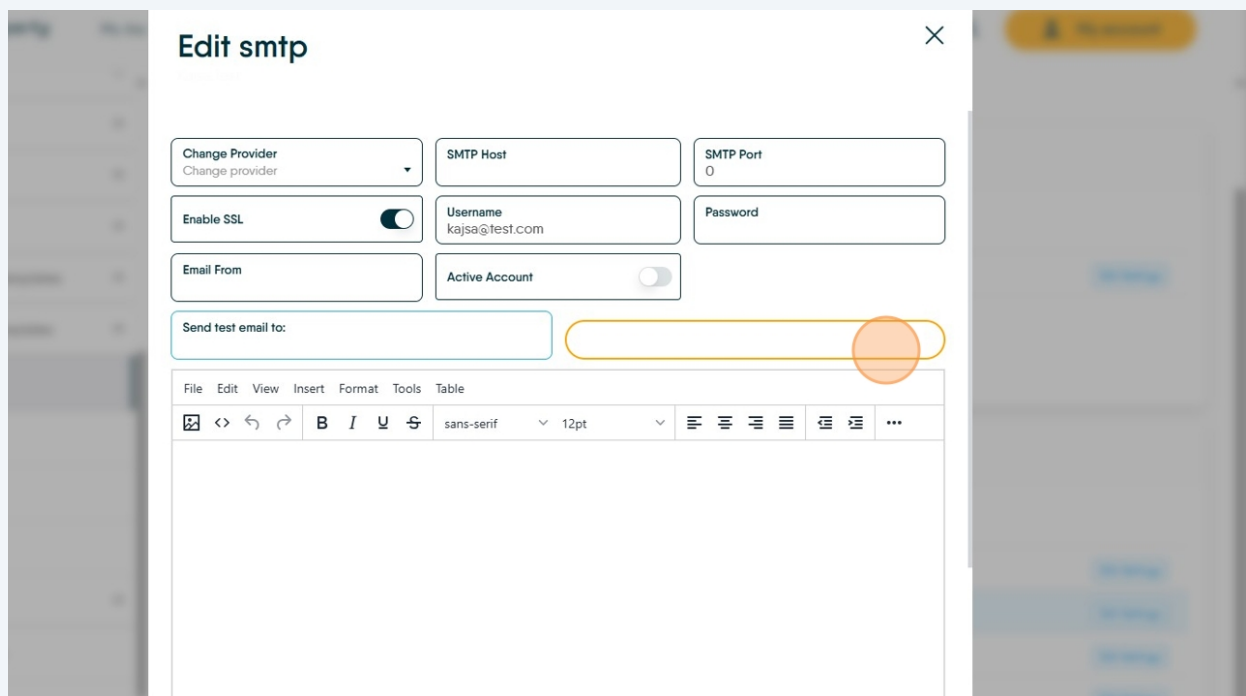
The screenshot shows the 'Edit smtp' dialog box. The 'Send test email to:' field is highlighted with an orange circle. The dialog box contains the following fields and controls:

- Change Provider (dropdown menu)
- SMTP Host (text input)
- SMTP Port (text input, value 0)
- Enable SSL (toggle switch, currently off)
- Username (text input, value kajsa@test.com)
- Password (text input)
- Email From (text input)
- Active Account (toggle switch, currently off)
- Send test email to: (text input, highlighted with an orange circle)
- Send Test Email (orange button)

Below the fields is a rich text editor with a menu bar (File, Edit, View, Insert, Format, Tools, Table) and a toolbar with icons for bold, italic, underline, strikethrough, text color, background color, bulleted list, numbered list, link, unlink, and more options. The text area is currently empty.

14

Click "Send Test Email"



The screenshot shows the 'Edit smtp' dialog box. The 'Send Test Email' button is highlighted with an orange circle. The dialog box contains the following fields and controls:

- Change Provider (dropdown menu)
- SMTP Host (text input)
- SMTP Port (text input, value 0)
- Enable SSL (toggle switch, currently off)
- Username (text input, value kajsa@test.com)
- Password (text input)
- Email From (text input)
- Active Account (toggle switch, currently off)
- Send test email to: (text input)
- Send Test Email (orange button, highlighted with an orange circle)

Below the fields is a rich text editor with a menu bar (File, Edit, View, Insert, Format, Tools, Table) and a toolbar with icons for bold, italic, underline, strikethrough, text color, background color, bulleted list, numbered list, link, unlink, and more options. The text area is currently empty.

15 Click here.

Edit smtp ✕

Change Provider
Change provider

SMTP Host

SMTP Port
0

Enable SSL ☐

Username
kajsa@test.com

Password

Email From

Active Account ☐

Send test email to:

Send Test Email

Cancel **Save**