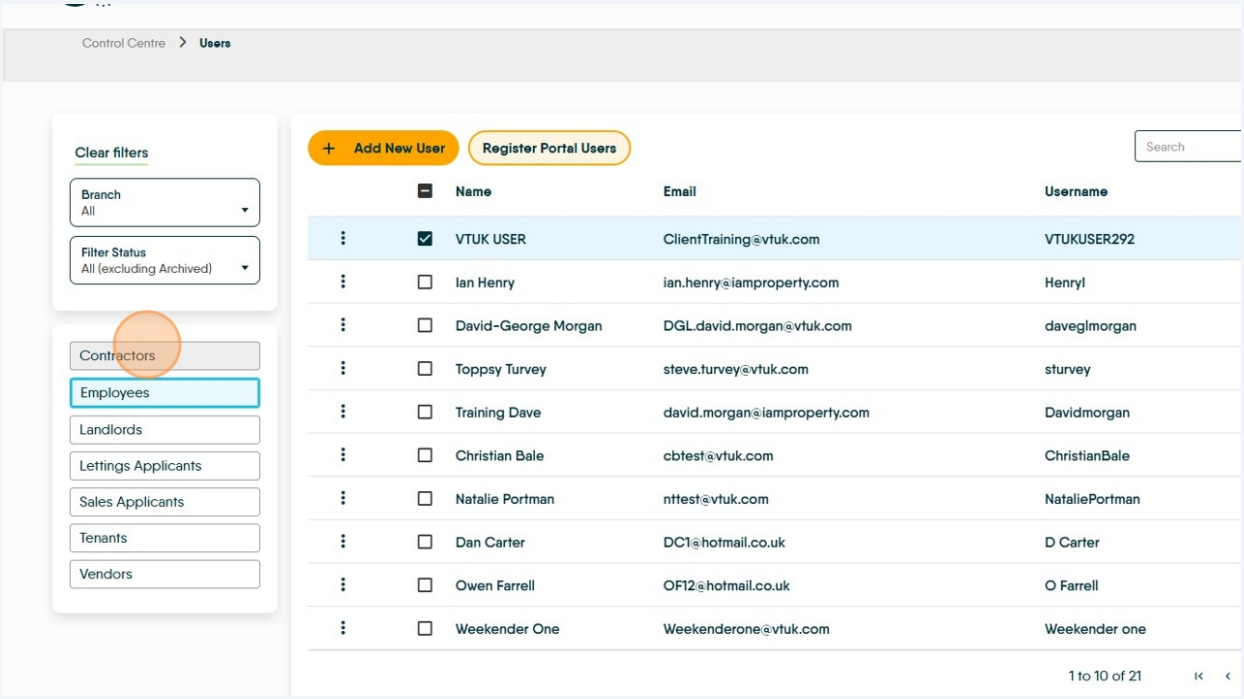
Giving Contractors Access to the Contractor Portal

1 Navigate to https://crm.iamproperty.com/myday

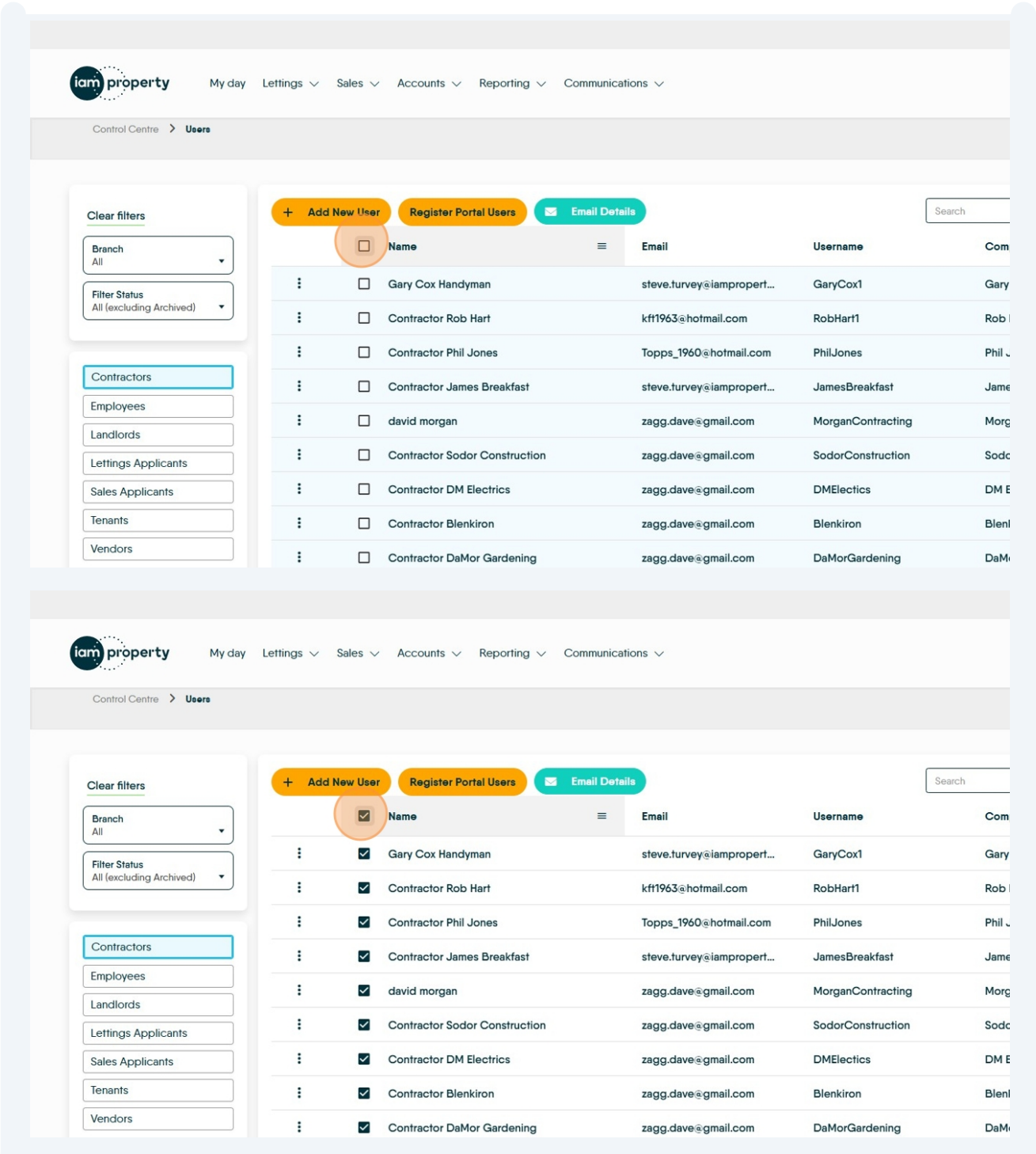
Giving a Contractor access to the Contractor Portal

To use this, navigate to 'My Account' then 'Control Center' then 'Users'

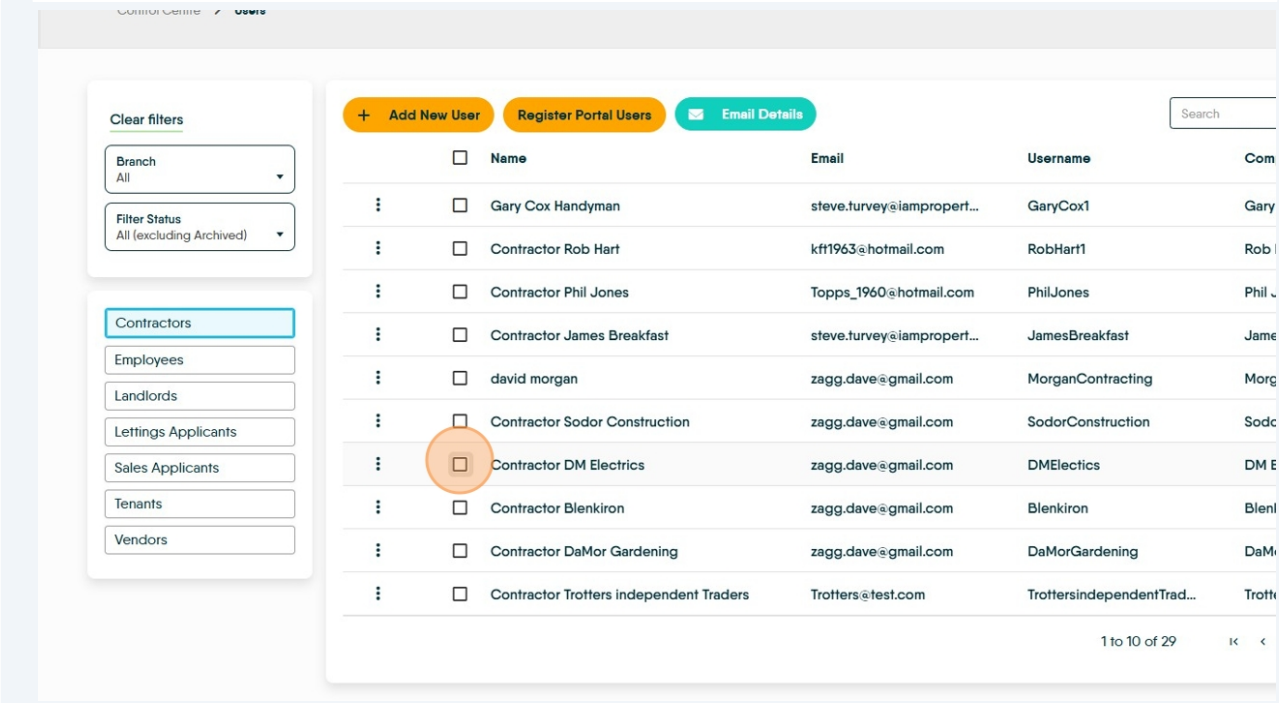
2 In the Users menu. Click "Contractors"



3 Select all the Contractors you want to send the login either click this checkbox to select ALL Contractors or click the checkbox beside each individual Contractors



4 To individually add a contractor click this checkbox.


Clear filters
Branch
All
Filter Status
All (excluding Archived)
Contractors
Employees
Landlords
Lettings Applicants
Sales Applicants
Tenants
Vendors
Add New User
Register Portal Users
Email Details
Search
Name
Email
Username
Gary Cox Handyman
steve.turvey@iampropert...
GaryCox1
Contractor Rob Hart
kft1963@hotmail.com
RobHart1
Contractor Phil Jones
Topps_1960@hotmail.com
PhilJones
Contractor James Breakfast
steve.turvey@iampropert...
JamesBreakfast
david morgan
zagg.dave@gmail.com
MorganContracting
Contractor Sodor Construction
zagg.dave@gmail.com
SodorConstruction
Contractor DM Electrics
zagg.dave@gmail.com
DMElectics
Contractor Blenkiron
zagg.dave@gmail.com
Blenkiron
Contractor DaMor Gardening
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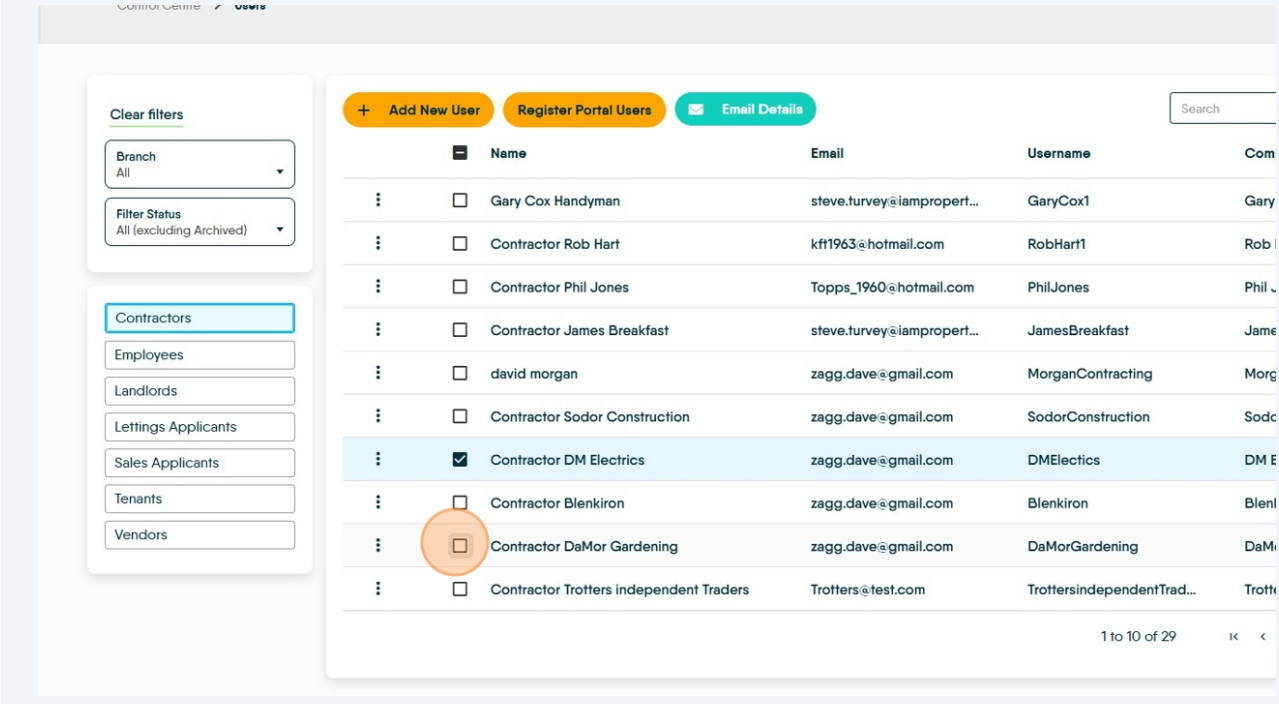
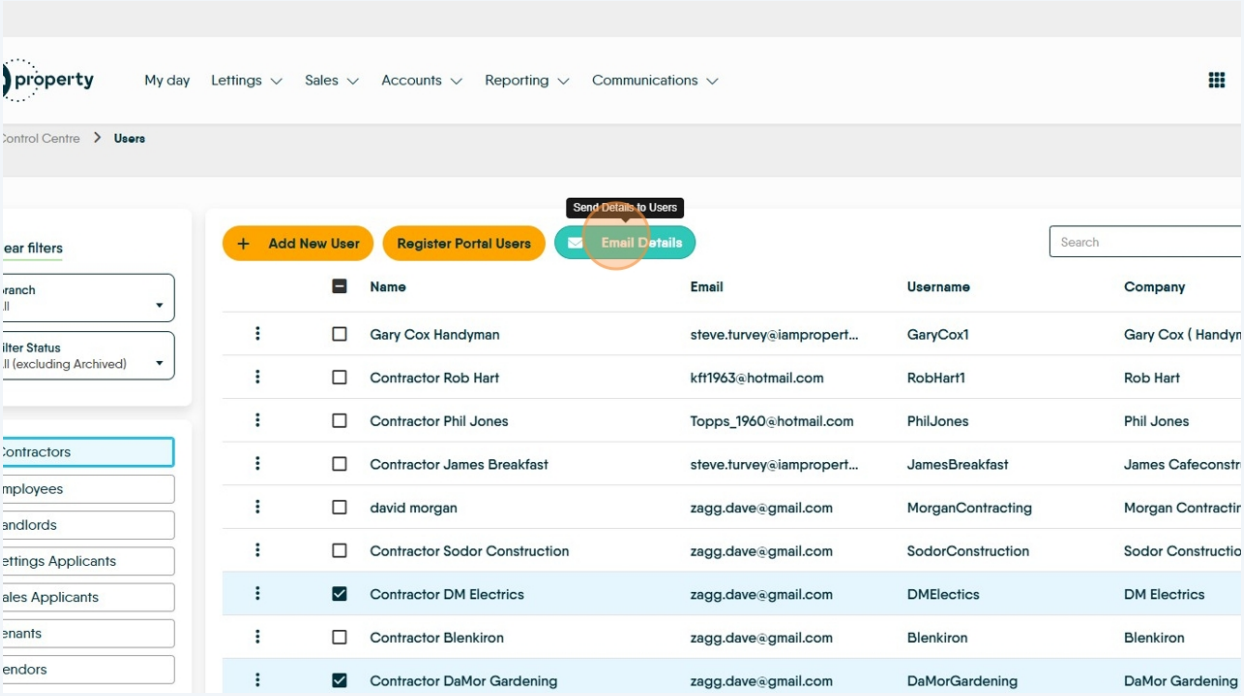
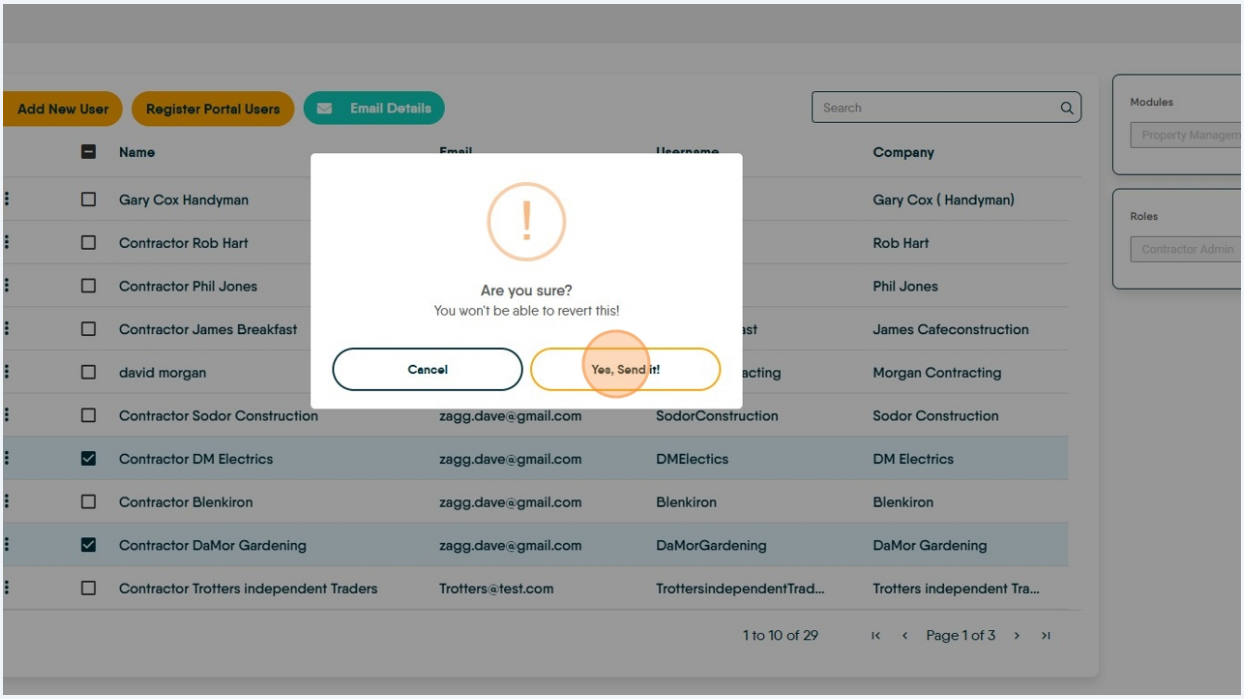
DaMorGardening
Contractor Trotters independent Traders
Trotters@test.com
TrottersindependentTrad...
1 to 10 of 29


Clear filters
Branch
All
Filter Status
All (excluding Archived)
Contractors
Employees
Landlords
Lettings Applicants
Sales Applicants
Tenants
Vendors
Add New User
Register Portal Users
Email Details
Search
Name
Email
Username
Gary Cox Handyman
steve.turvey@iampropert...
GaryCox1
Contractor Rob Hart
kft1963@hotmail.com
RobHart1
Contractor Phil Jones
Topps_1960@hotmail.com
PhilJones
Contractor James Breakfast
steve.turvey@iampropert...
JamesBreakfast
david morgan
zagg.dave@gmail.com
MorganContracting
Contractor Sodor Construction
zagg.dave@gmail.com
SodorConstruction
Contractor DM Electrics
zagg.dave@gmail.com
DMElectics
Contractor Blenkiron
zagg.dave@gmail.com
Blenkiron
Contractor DaMor Gardening
zagg.dave@gmail.com
DaMorGardening
Contractor Trotters independent Traders
Trotters@test.com
TrottersindependentTrad...
1 to 10 of 29

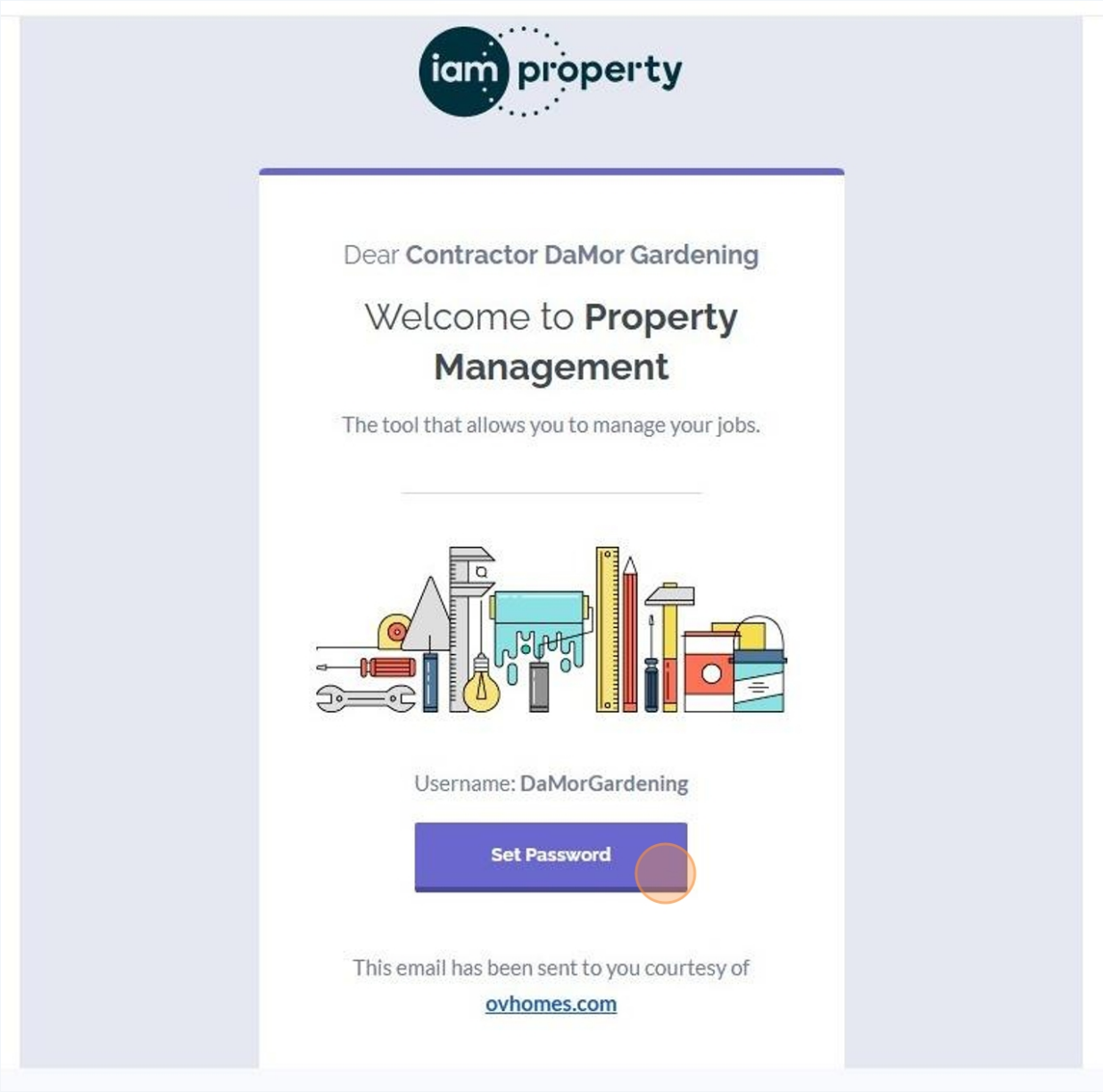
5 Once the recipients are selected, click "Email Details"



6 Click "Yes, Send it!"

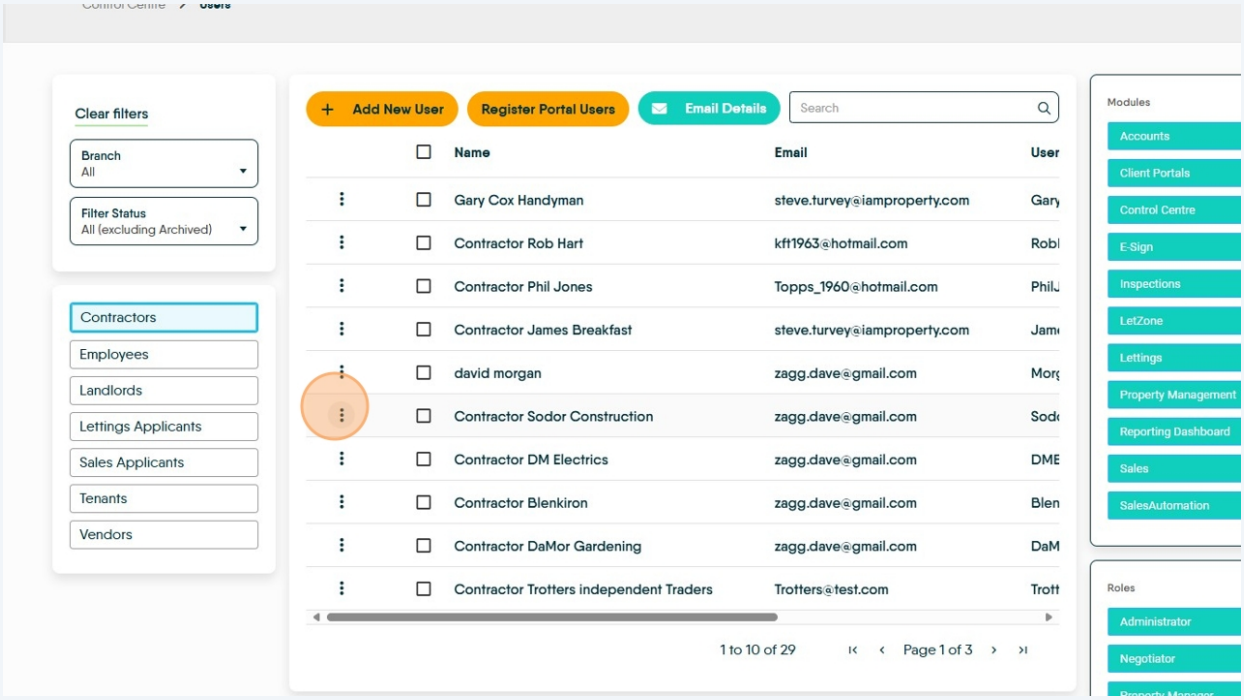


7 The Contractor will receive this email, personalised to your company.



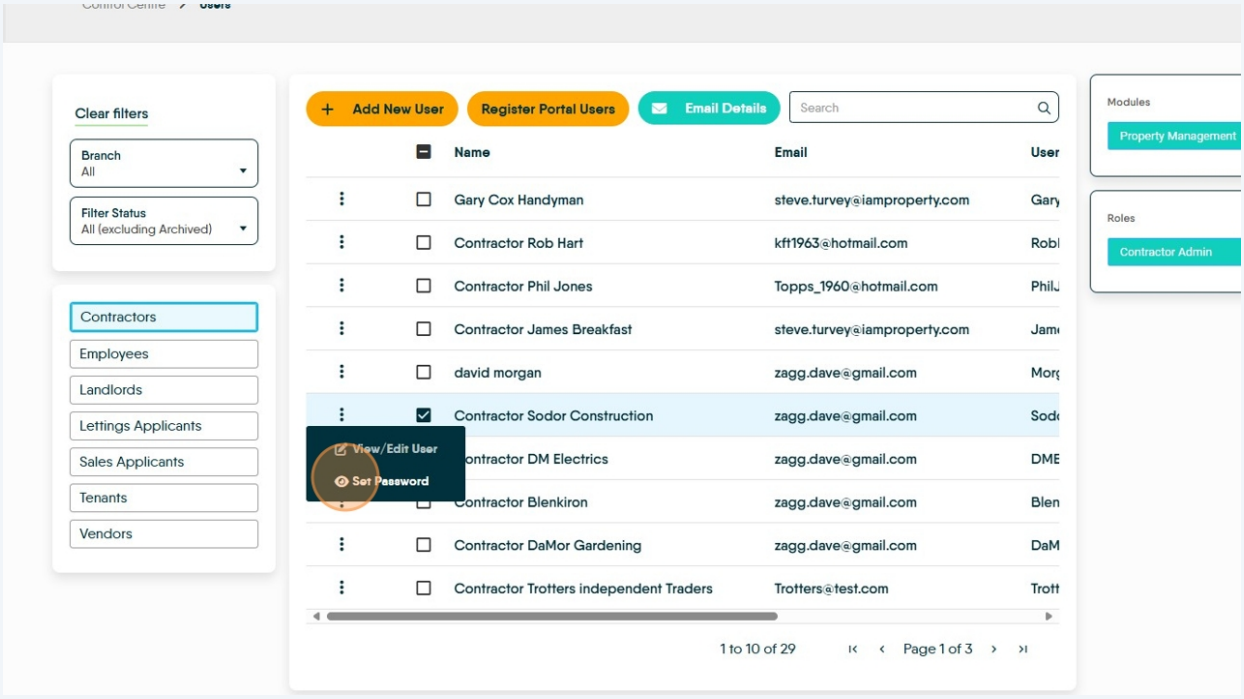
To Edit a Contractor User

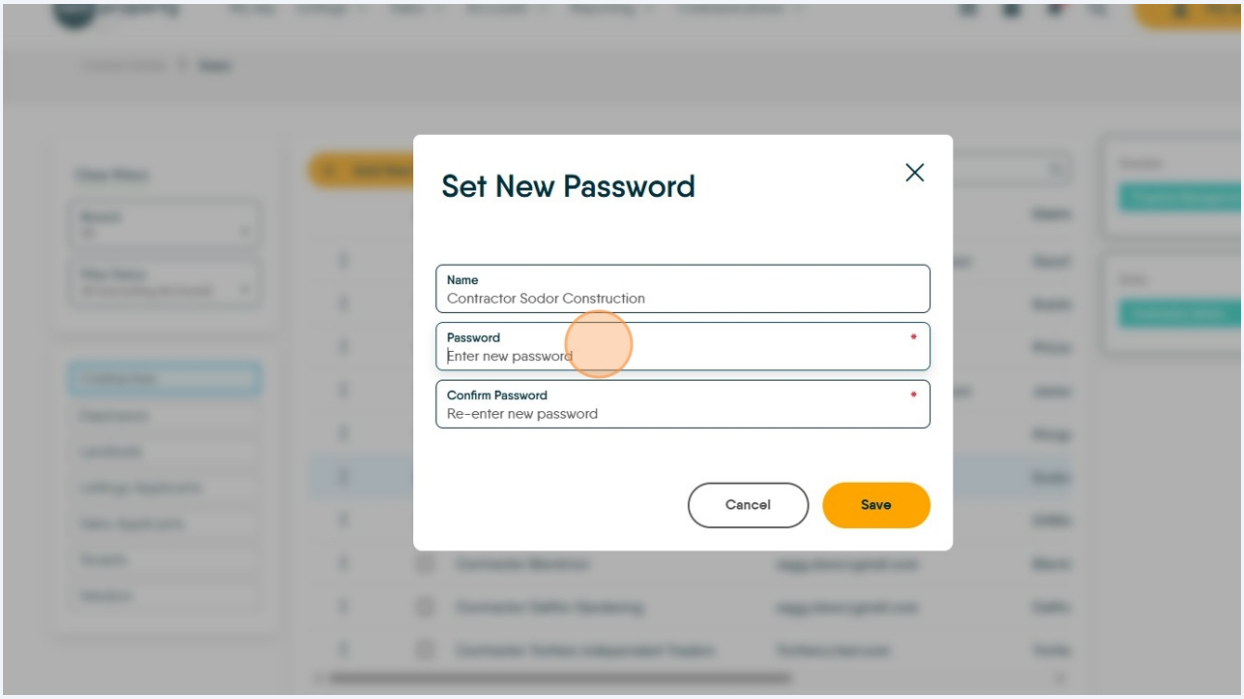
8 Click here.

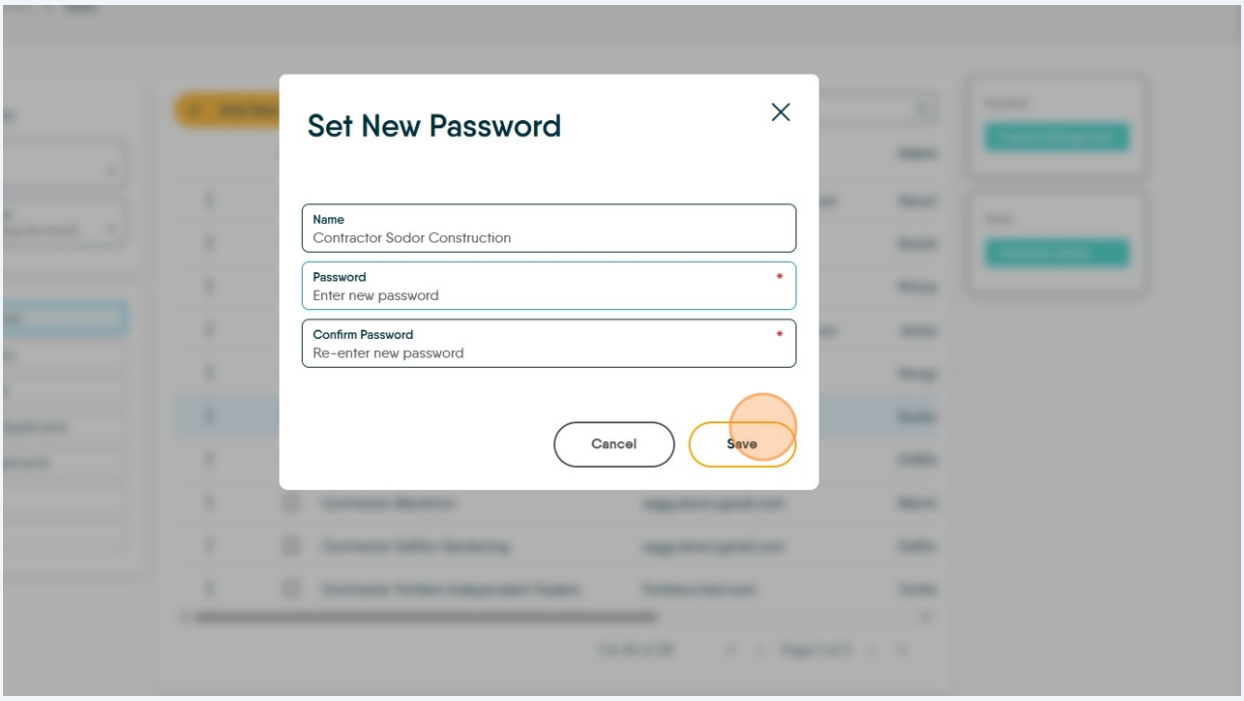


9 To reset the password click here. Click the "Password" field.
Click "Save"

The Contractor can reset their own password from their login screen.



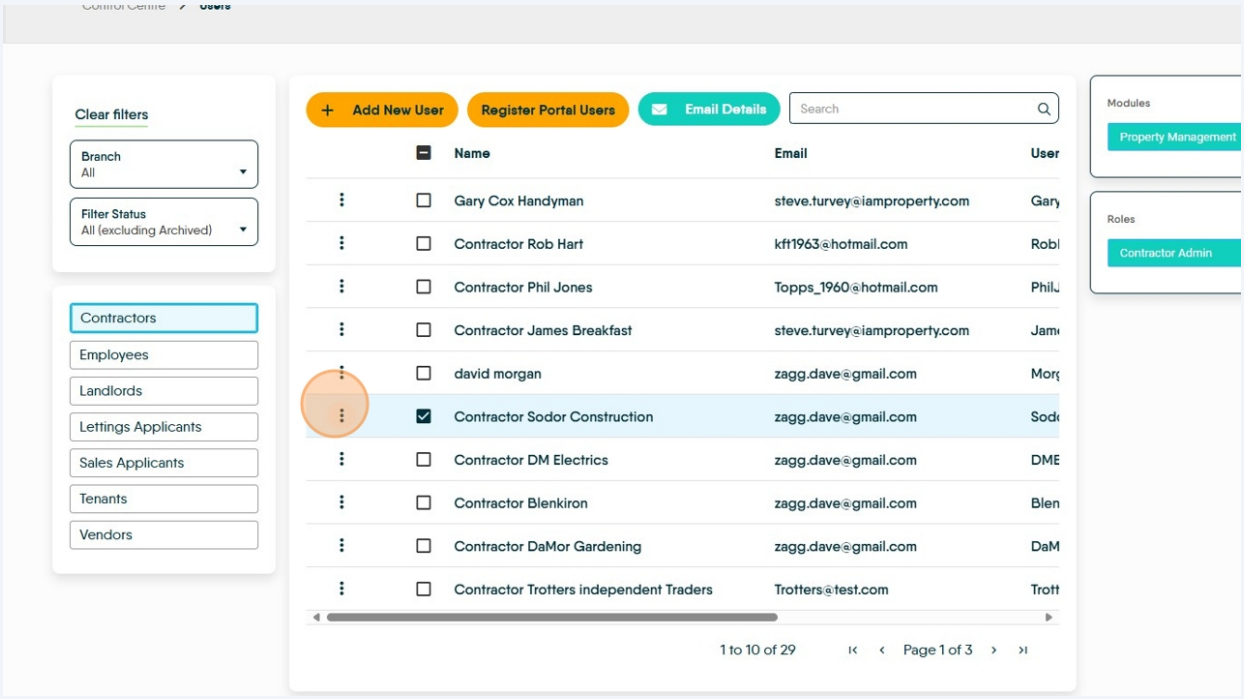


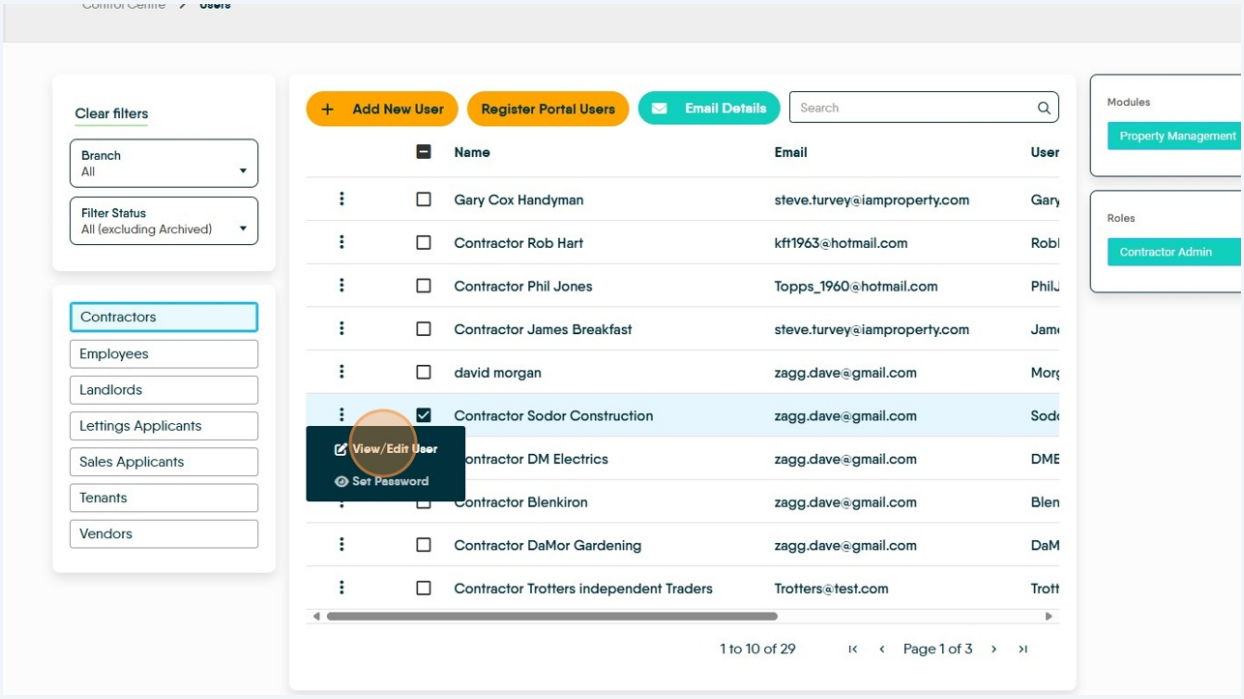


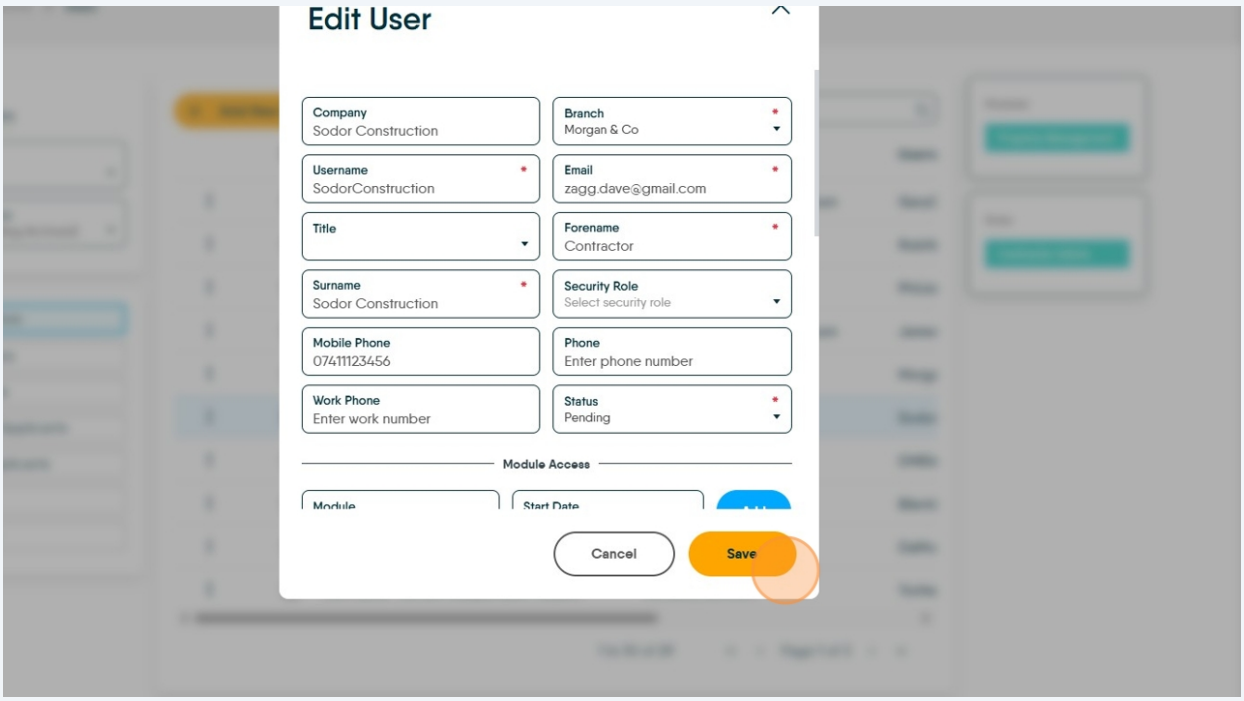
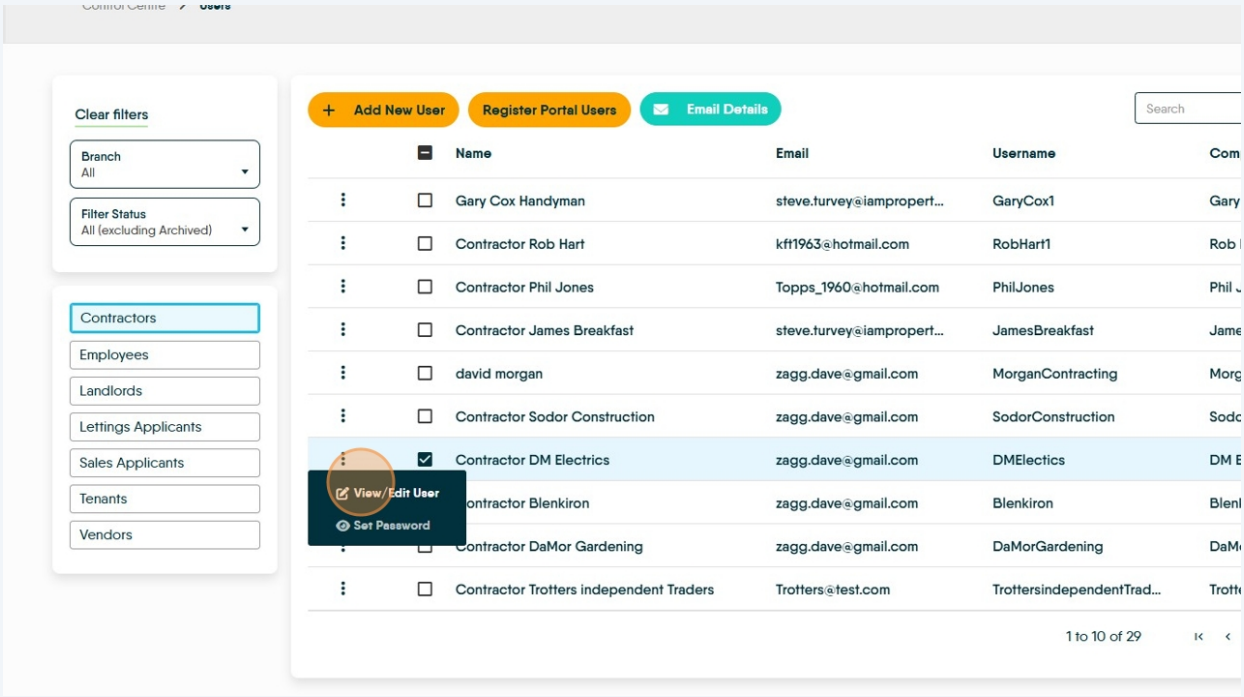
To Edit the User Details

⚠ Alert! The best place to edit the data for a Contractor is in the Contractor record on CRM.

10 Click here.
Click "View/Edit User"
Edit the details and click here to save.







11 Click "View/Edit User"