

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"

Control Centre > Users

Clear filters

Branch: All

Filter Status: All (excluding Archived)

Contractors (selected)

Employees

Landlords

Lettings Applicants

Sales Applicants

Tenants

Vendors

+ Add New User Register Portal Users Search

	Name	Email	Username
<input checked="" type="checkbox"/>	VTUK USER	ClientTraining@vtuk.com	VTUKUSER292
<input type="checkbox"/>	Ian Henry	ian.henry@iamproperty.com	HenryI
<input type="checkbox"/>	David-George Morgan	DGL.david.morgan@vtuk.com	daveglmorgan
<input type="checkbox"/>	Topsy Turvey	steve.turvey@vtuk.com	sturvey
<input type="checkbox"/>	Training Dave	david.morgan@iamproperty.com	Davidmorgan
<input type="checkbox"/>	Christian Bale	cbtest@vtuk.com	ChristianBale
<input type="checkbox"/>	Natalie Portman	nttest@vtuk.com	NataliePortman
<input type="checkbox"/>	Dan Carter	DC1@hotmail.co.uk	D Carter
<input type="checkbox"/>	Owen Farrell	OF12@hotmail.co.uk	O Farrell
<input type="checkbox"/>	Weekender One	Weekenderone@vtuk.com	Weekender one

1 to 10 of 21

- 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

My day
Lettings
Sales
Accounts
Reporting
Communications

Control Centre > Users

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

	<input type="checkbox"/>	Name	Email	Username	Com
⋮	<input type="checkbox"/>	Gary Cox Handyman	steve.turvey@iamproperf...	GaryCox1	Gary
⋮	<input type="checkbox"/>	Contractor Rob Hart	kff1963@hotmail.com	RobHart1	Rob
⋮	<input type="checkbox"/>	Contractor Phil Jones	Topps_1960@hotmail.com	PhilJones	Phil
⋮	<input type="checkbox"/>	Contractor James Breakfast	steve.turvey@iamproperf...	JamesBreakfast	Jame
⋮	<input type="checkbox"/>	david morgan	zagg.dave@gmail.com	MorganContracting	Morg
⋮	<input type="checkbox"/>	Contractor Sodor Construction	zagg.dave@gmail.com	SodorConstruction	Sodc
⋮	<input type="checkbox"/>	Contractor DM Electrics	zagg.dave@gmail.com	DMElectics	DM E
⋮	<input type="checkbox"/>	Contractor Blenkiron	zagg.dave@gmail.com	Blenkiron	Blenl
⋮	<input type="checkbox"/>	Contractor DaMor Gardening	zagg.dave@gmail.com	DaMorGardening	DaM

My day
Lettings
Sales
Accounts
Reporting
Communications

Control Centre > Users

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

	<input checked="" type="checkbox"/>	Name	Email	Username	Com
⋮	<input checked="" type="checkbox"/>	Gary Cox Handyman	steve.turvey@iamproperf...	GaryCox1	Gary
⋮	<input checked="" type="checkbox"/>	Contractor Rob Hart	kff1963@hotmail.com	RobHart1	Rob
⋮	<input checked="" type="checkbox"/>	Contractor Phil Jones	Topps_1960@hotmail.com	PhilJones	Phil
⋮	<input checked="" type="checkbox"/>	Contractor James Breakfast	steve.turvey@iamproperf...	JamesBreakfast	Jame
⋮	<input checked="" type="checkbox"/>	david morgan	zagg.dave@gmail.com	MorganContracting	Morg
⋮	<input checked="" type="checkbox"/>	Contractor Sodor Construction	zagg.dave@gmail.com	SodorConstruction	Sodc
⋮	<input checked="" type="checkbox"/>	Contractor DM Electrics	zagg.dave@gmail.com	DMElectics	DM E
⋮	<input checked="" type="checkbox"/>	Contractor Blenkiron	zagg.dave@gmail.com	Blenkiron	Blenl
⋮	<input checked="" type="checkbox"/>	Contractor DaMor Gardening	zagg.dave@gmail.com	DaMorGardening	DaM

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

	<input type="checkbox"/>	Name	Email	Username	Com
⋮	<input type="checkbox"/>	Gary Cox Handyman	steve.turvey@iampropert...	GaryCox1	Gary
⋮	<input type="checkbox"/>	Contractor Rob Hart	kft1963@hotmail.com	RobHart1	Rob
⋮	<input type="checkbox"/>	Contractor Phil Jones	Topps_1960@hotmail.com	PhilJones	Phil
⋮	<input type="checkbox"/>	Contractor James Breakfast	steve.turvey@iampropert...	JamesBreakfast	Jame
⋮	<input type="checkbox"/>	david morgan	zagg.dave@gmail.com	MorganContracting	Morg
⋮	<input type="checkbox"/>	Contractor Sodor Construction	zagg.dave@gmail.com	SodorConstruction	Sodc
⋮	<input type="checkbox"/>	Contractor DM Electrics	zagg.dave@gmail.com	DMElectics	DM E
⋮	<input type="checkbox"/>	Contractor Blenkiron	zagg.dave@gmail.com	Blenkiron	Blenl
⋮	<input type="checkbox"/>	Contractor DaMor Gardening	zagg.dave@gmail.com	DaMorGardening	DaM
⋮	<input type="checkbox"/>	Contractor Trotters independent Traders	Trotters@test.com	TrottersindependentTrad...	Troth

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

	<input checked="" type="checkbox"/>	Name	Email	Username	Com
⋮	<input type="checkbox"/>	Gary Cox Handyman	steve.turvey@iampropert...	GaryCox1	Gary
⋮	<input type="checkbox"/>	Contractor Rob Hart	kft1963@hotmail.com	RobHart1	Rob
⋮	<input type="checkbox"/>	Contractor Phil Jones	Topps_1960@hotmail.com	PhilJones	Phil
⋮	<input type="checkbox"/>	Contractor James Breakfast	steve.turvey@iampropert...	JamesBreakfast	Jame
⋮	<input type="checkbox"/>	david morgan	zagg.dave@gmail.com	MorganContracting	Morg
⋮	<input type="checkbox"/>	Contractor Sodor Construction	zagg.dave@gmail.com	SodorConstruction	Sodc
⋮	<input checked="" type="checkbox"/>	Contractor DM Electrics	zagg.dave@gmail.com	DMElectics	DM E
⋮	<input type="checkbox"/>	Contractor Blenkiron	zagg.dave@gmail.com	Blenkiron	Blenl
⋮	<input type="checkbox"/>	Contractor DaMor Gardening	zagg.dave@gmail.com	DaMorGardening	DaM
⋮	<input type="checkbox"/>	Contractor Trotters independent Traders	Trotters@test.com	TrottersindependentTrad...	Troth

1 to 10 of 29

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

The screenshot shows the 'Users' management page. On the left, there are filters for 'Branch' and 'Filter Status'. The main area has three buttons: 'Add New User', 'Register Portal Users', and 'Email Details' (highlighted with a red circle). Below these buttons is a table of users. The 'Email Details' button is also highlighted with a red circle in the top right corner of the table area.

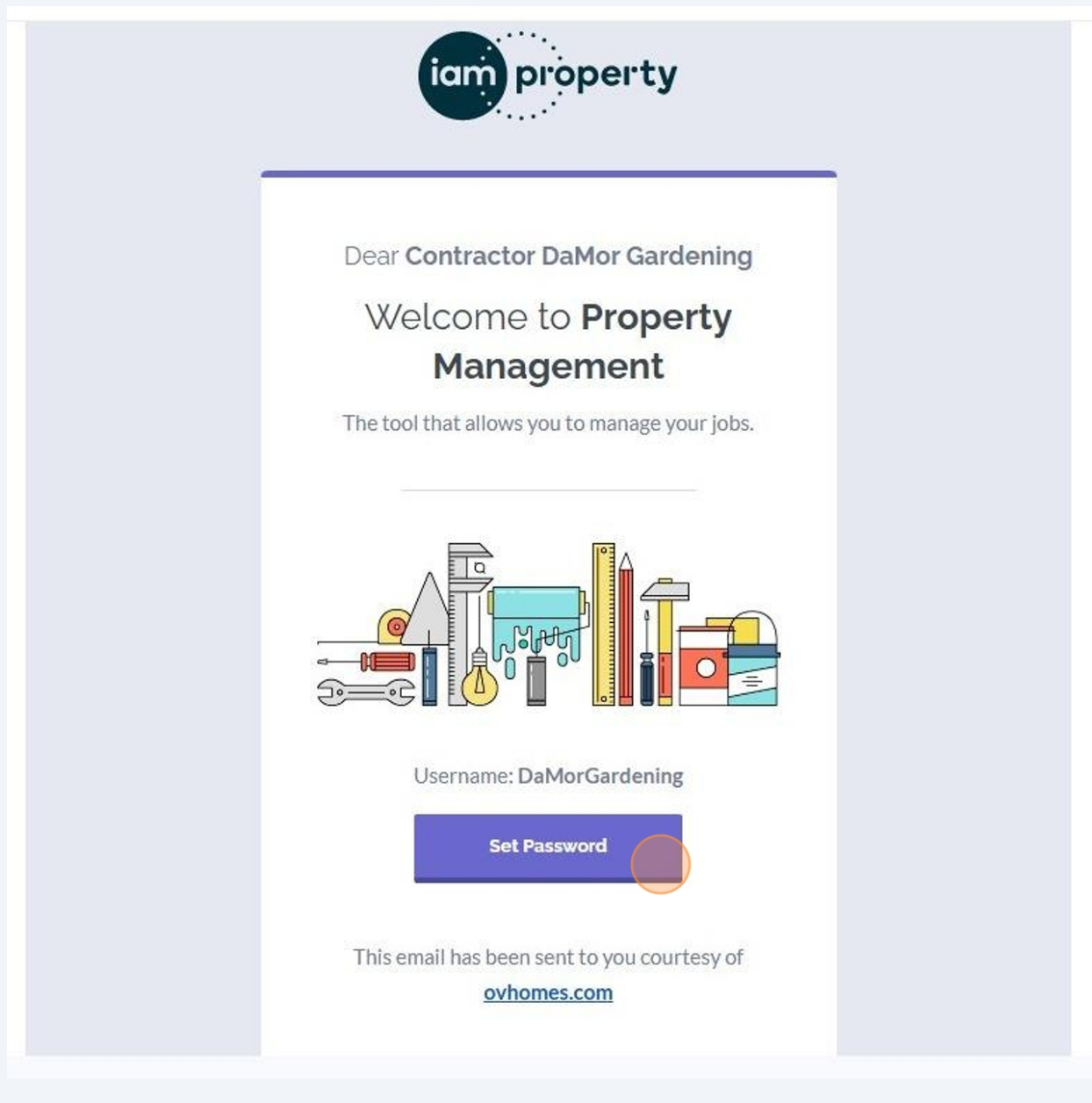
	Name	Email	Username	Company
<input type="checkbox"/>	Gary Cox Handyman	steve.turvey@iamproperf...	GaryCox1	Gary Cox (Handyn
<input type="checkbox"/>	Contractor Rob Hart	kft1963@hotmail.com	RobHart1	Rob Hart
<input type="checkbox"/>	Contractor Phil Jones	Topps_1960@hotmail.com	PhilJones	Phil Jones
<input type="checkbox"/>	Contractor James Breakfast	steve.turvey@iamproperf...	JamesBreakfast	James Cafeconstr
<input type="checkbox"/>	david morgan	zagg.dave@gmail.com	MorganContracting	Morgan Contractir
<input type="checkbox"/>	Contractor Sodor Construction	zagg.dave@gmail.com	SodorConstruction	Sodor Constructio
<input checked="" type="checkbox"/>	Contractor DM Electrics	zagg.dave@gmail.com	DMElectrics	DM Electrics
<input type="checkbox"/>	Contractor Blenkiron	zagg.dave@gmail.com	Blenkiron	Blenkiron
<input checked="" type="checkbox"/>	Contractor DaMor Gardening	zagg.dave@gmail.com	DaMorGardening	DaMor Gardening

6 Click "Yes, Send it!"

The screenshot shows the 'Email Details' dialog box. The dialog box has a title bar with a red exclamation mark icon. The text inside the dialog box says 'Are you sure? You won't be able to revert this!'. There are two buttons: 'Cancel' and 'Yes, Send it!' (highlighted with a red circle). The background shows the 'Users' management page with the 'Email Details' button highlighted.

7

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



To Edit a Contractor User

8 Click here.

Control Centre / Users

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

<input type="checkbox"/>	Name	Email	User
<input type="checkbox"/>	Gary Cox Handyman	steve.turvey@iamproperty.com	Gary
<input type="checkbox"/>	Contractor Rob Hart	kf11963@hotmail.com	Robi
<input type="checkbox"/>	Contractor Phil Jones	Topps_1960@hotmail.com	PhilL
<input type="checkbox"/>	Contractor James Breakfast	steve.turvey@iamproperty.com	Jami
<input type="checkbox"/>	david morgan	zagg.dave@gmail.com	Morq
<input type="checkbox"/>	Contractor Sodor Construction	zagg.dave@gmail.com	Sodr
<input type="checkbox"/>	Contractor DM Electrics	zagg.dave@gmail.com	DME
<input type="checkbox"/>	Contractor Blenkiron	zagg.dave@gmail.com	Blen
<input type="checkbox"/>	Contractor DaMor Gardening	zagg.dave@gmail.com	DaM
<input type="checkbox"/>	Contractor Trotters independent Traders	Trotters@test.com	Trott

1 to 10 of 29 Page 1 of 3

Modules: Accounts, Client Portals, Control Centre, E-Sign, Inspections, LetZone, Lettings, Property Management, Reporting Dashboard, Sales, SalesAutomation

Roles: Administrator, Negotiator, Property Manager

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

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

Control Centre / Users

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

<input type="checkbox"/>	Name	Email	User
<input type="checkbox"/>	Gary Cox Handyman	steve.turvey@iamproperty.com	Gary
<input type="checkbox"/>	Contractor Rob Hart	kf11963@hotmail.com	Robi
<input type="checkbox"/>	Contractor Phil Jones	Topps_1960@hotmail.com	PhilL
<input type="checkbox"/>	Contractor James Breakfast	steve.turvey@iamproperty.com	Jami
<input type="checkbox"/>	david morgan	zagg.dave@gmail.com	Morq
<input checked="" type="checkbox"/>	Contractor Sodor Construction	zagg.dave@gmail.com	Sodr
<input type="checkbox"/>	Contractor DM Electrics	zagg.dave@gmail.com	DME
<input type="checkbox"/>	Contractor Blenkiron	zagg.dave@gmail.com	Blen
<input type="checkbox"/>	Contractor DaMor Gardening	zagg.dave@gmail.com	DaM
<input type="checkbox"/>	Contractor Trotters independent Traders	Trotters@test.com	Trott

1 to 10 of 29 Page 1 of 3

Modules: Property Management

Roles: Contractor Admin

View/Edit User Set Password

The screenshot shows a 'Set New Password' dialog box with a close button (X) in the top right corner. It contains three input fields: 'Name' with the value 'Contractor Sodor Construction', 'Password' with the placeholder 'Enter new password', and 'Confirm Password' with the placeholder 'Re-enter new password'. Each of the last two fields has a red asterisk on the right. At the bottom are 'Cancel' and 'Save' buttons. An orange circle highlights the 'Password' input field.

This screenshot shows the same 'Set New Password' dialog box. In this version, an orange circle highlights the 'Save' button at the bottom right.

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.

Control Centre / Users

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	User
⋮	<input type="checkbox"/> Gary Cox Handyman	steve.turvey@iamproperty.com	Gary
⋮	<input type="checkbox"/> Contractor Rob Hart	kft1963@hotmail.com	Robl
⋮	<input type="checkbox"/> Contractor Phil Jones	Topps_1960@hotmail.com	PhilJ
⋮	<input type="checkbox"/> Contractor James Breakfast	steve.turvey@iamproperty.com	Jamv
⋮	<input type="checkbox"/> david morgan	zagg.dave@gmail.com	Morg
⋮	<input checked="" type="checkbox"/> Contractor Sodor Construction	zagg.dave@gmail.com	Sodr
⋮	<input type="checkbox"/> Contractor DM Electrics	zagg.dave@gmail.com	DME
⋮	<input type="checkbox"/> Contractor Blenkiron	zagg.dave@gmail.com	Blen
⋮	<input type="checkbox"/> Contractor DaMor Gardening	zagg.dave@gmail.com	DaM
⋮	<input type="checkbox"/> Contractor Trotters independent Traders	Trotters@test.com	Trott

1 to 10 of 29 < > Page 1 of 3 > >

Modules

Property Management

Roles

Contractor Admin

Control Centre / Users

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	User
⋮	<input type="checkbox"/> Gary Cox Handyman	steve.turvey@iamproperty.com	Gary
⋮	<input type="checkbox"/> Contractor Rob Hart	kft1963@hotmail.com	Robl
⋮	<input type="checkbox"/> Contractor Phil Jones	Topps_1960@hotmail.com	PhilJ
⋮	<input type="checkbox"/> Contractor James Breakfast	steve.turvey@iamproperty.com	Jamv
⋮	<input type="checkbox"/> david morgan	zagg.dave@gmail.com	Morg
⋮	<input checked="" type="checkbox"/> Contractor Sodor Construction	zagg.dave@gmail.com	Sodr
⋮	<input type="checkbox"/> Contractor DM Electrics	zagg.dave@gmail.com	DME
⋮	<input type="checkbox"/> Contractor Blenkiron	zagg.dave@gmail.com	Blen
⋮	<input type="checkbox"/> Contractor DaMor Gardening	zagg.dave@gmail.com	DaM
⋮	<input type="checkbox"/> Contractor Trotters independent Traders	Trotters@test.com	Trott

1 to 10 of 29 < > Page 1 of 3 > >

Modules

Property Management

Roles

Contractor Admin

Edit User

Company Sodor Construction	Branch Morgan & Co
Username SodorConstruction	Email zagg.dave@gmail.com
Title	Forename Contractor
Surname Sodor Construction	Security Role Select security role
Mobile Phone 07411123456	Phone Enter phone number
Work Phone Enter work number	Status Pending

Module Access

Module	Start Date
--------	------------

Cancel Save

11 Click "View/Edit User"

Control Centre / Users

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	Com
⋮	<input type="checkbox"/> Gary Cox Handyman	steve.turvey@iampropert...	GaryCox1	Gary
⋮	<input type="checkbox"/> Contractor Rob Hart	kff1963@hotmail.com	RobHart1	Rob
⋮	<input type="checkbox"/> Contractor Phil Jones	Topps_1960@hotmail.com	PhilJones	Phil
⋮	<input type="checkbox"/> Contractor James Breakfast	steve.turvey@iampropert...	JamesBreakfast	Jame
⋮	<input type="checkbox"/> david morgan	zagg.dave@gmail.com	MorganContracting	Morg
⋮	<input type="checkbox"/> Contractor Sodor Construction	zagg.dave@gmail.com	SodorConstruction	Sodc
⋮	<input checked="" type="checkbox"/> Contractor DM Electrics	zagg.dave@gmail.com	DMElectics	DM E
⋮	<input type="checkbox"/> Contractor Blenkiron	zagg.dave@gmail.com	Blenkiron	Blen
⋮	<input type="checkbox"/> Contractor DaMor Gardening	zagg.dave@gmail.com	DaMorGardening	DaM
⋮	<input type="checkbox"/> Contractor Trotters independent Traders	Trotters@test.com	TrottersindependentTrad...	Trott

1 to 10 of 29