

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"

The screenshot shows the 'Control Centre' interface with the 'Users' menu selected. On the left, there is a sidebar with 'Clear filters' and several dropdowns: 'Branch' (All), 'Filter Status' (All (excluding Archived)), and a list of categories: Contractors (highlighted with an orange circle), Employees (highlighted with a blue box), Landlords, Lettings Applicants, Sales Applicants, Tenants, and Vendors. The main area is a table titled 'Register Portal Users' with columns for Name, Email, and Username. The table lists 10 users, including 'VTUK USER' (selected with a checked checkbox) and others like Ian Henry, David-George Morgan, and Toppsy Turvey. At the bottom of the table, it says '1 to 10 of 21'.

	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"/> Toppsy 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

- 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



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	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	James
⋮	<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	DMElectrics	DM E
⋮	<input type="checkbox"/> Contractor Blenkiron	zagg.dave@gmail.com	Blenkiron	Blenl
⋮	<input type="checkbox"/> Contractor DaMor Gardening	zagg.dave@gmail.com	DaMorGardening	DaMi



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 checked="" type="checkbox"/> Gary Cox Handyman	steve.turvey@iampropert...	GaryCox1	Gary
⋮	<input checked="" type="checkbox"/> Contractor Rob Hart	kft1963@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@iampropert...	JamesBreakfast	James
⋮	<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	DMElectrics	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	DaMi

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To individually add a contractor click this checkbox.

Common Sense / 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**

	<input type="checkbox"/> Name	Email	Username	Com
⋮	<input type="checkbox"/> Gary Cox Handyman	steve.turvey@iamproper...	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@iamproper...	JamesBreakfast	James
⋮	<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	DMElectrics	DM E
⋮	<input type="checkbox"/> Contractor Blenkiron	zagg.dave@gmail.com	Blenkiron	Blenl
⋮	<input type="checkbox"/> Contractor DaMor Gardening	zagg.dave@gmail.com	DaMorGardening	DaMor
⋮	<input type="checkbox"/> Contractor Trotters Independent Traders	Trotters@test.com	TrottersIndependentTrad...	Trott

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Common Sense / Users

Clear filters

Branch: All

Filter Status: All (excluding Archived)

Contractors

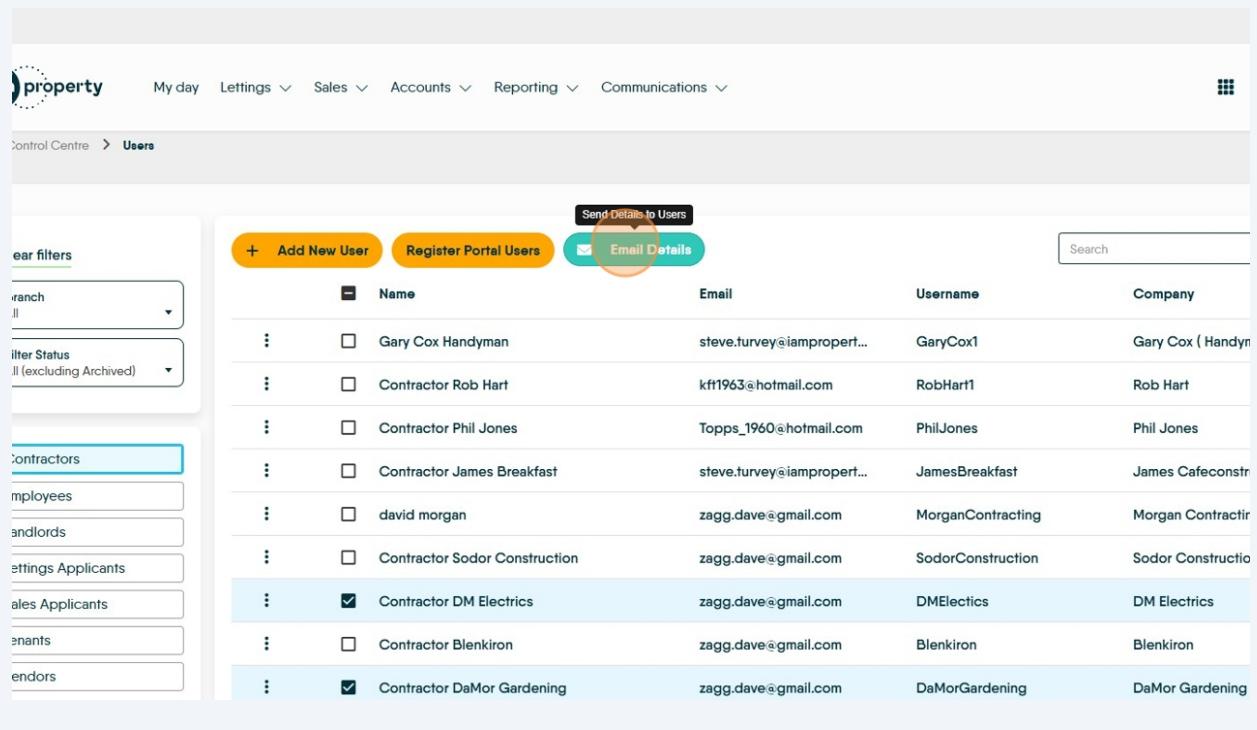
- Employees
- Landlords
- Lettings Applicants
- Sales Applicants
- Tenants
- Vendors

+ Add New User **Register Portal Users** **Email Details**

	<input checked="" type="checkbox"/> Name	Email	Username	Com
⋮	<input checked="" type="checkbox"/> Gary Cox Handyman	steve.turvey@iamproper...	GaryCox1	Gary
⋮	<input checked="" type="checkbox"/> Contractor Rob Hart	kft1963@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@iamproper...	JamesBreakfast	James
⋮	<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	DMElectrics	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	DaMor
⋮	<input checked="" type="checkbox"/> Contractor Trotters Independent Traders	Trotters@test.com	TrottersIndependentTrad...	Trott

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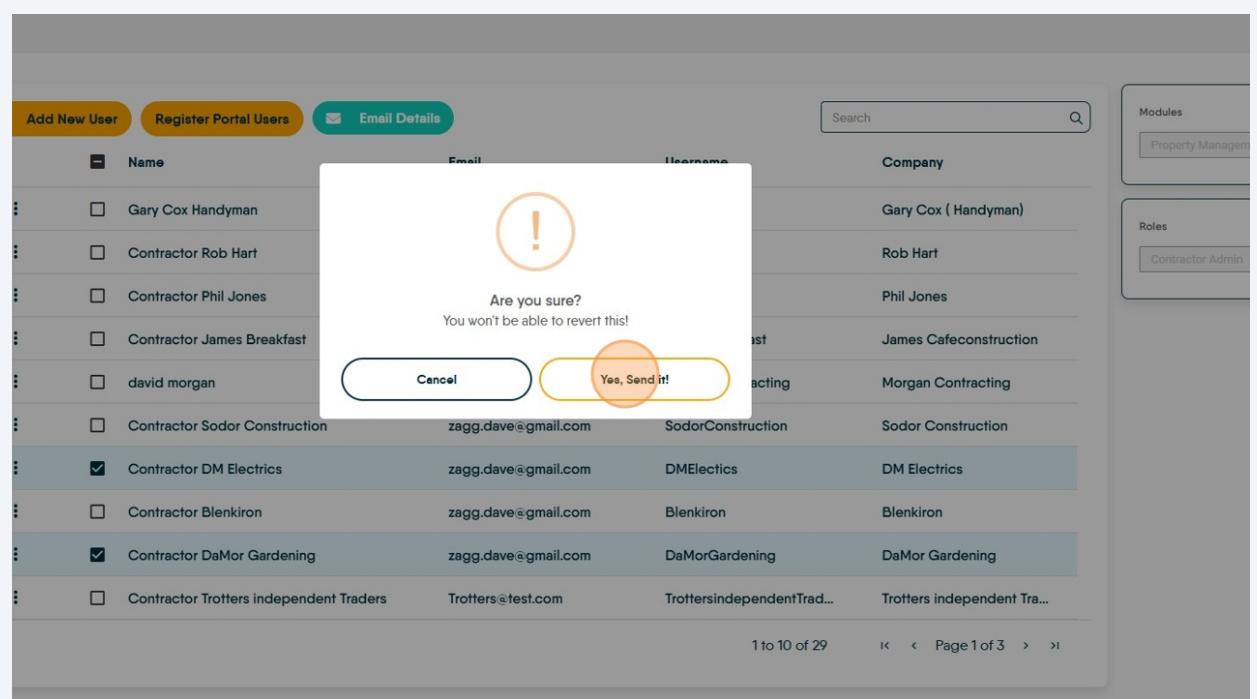
5 Once the recipients are selected, click "Email Details"



The screenshot shows the 'Users' section of a software interface. On the left, there are various filters and search fields. The main area displays a list of users with columns for Name, Email, Username, and Company. Two users are selected: 'Contractor DM Electrics' and 'Contractor DaMor Gardening'. The 'Email Details' button is highlighted with a yellow circle. The top navigation bar includes 'My day', 'Lettings', 'Sales', 'Accounts', 'Reporting', and 'Communications'.

Name	Email	Username	Company
Gary Cox Handyman	steve.turvey@iamproperty.com	GaryCox1	Gary Cox (Handyman)
Contractor Rob Hart	kft1963@hotmail.com	RobHart1	Rob Hart
Contractor Phil Jones	Topps_1960@hotmail.com	PhilJones	Phil Jones
Contractor James Breakfast	steve.turvey@iamproperty.com	JamesBreakfast	James Cafeconstruction
david morgan	zagg.dave@gmail.com	MorganContracting	Morgan Contracting
Contractor Sodor Construction	zagg.dave@gmail.com	SodorConstruction	Sodor Construction
<input checked="" type="checkbox"/> Contractor DM Electrics	zagg.dave@gmail.com	DMElectrics	DM Electrics
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 a confirmation dialog box in the center of the screen. It contains a large orange exclamation mark icon and the text 'Are you sure? You won't be able to revert this!'. Below the dialog are two buttons: 'Cancel' and 'Yes, Send it!'. The 'Yes, Send it!' button is highlighted with a yellow circle. The background shows the 'Email Details' section of the software, listing users and their details. The right side of the screen shows 'Modules' and 'Roles' sections.

Name	Email	Username	Company
Gary Cox Handyman	steve.turvey@iamproperty.com	GaryCox1	Gary Cox (Handyman)
Contractor Rob Hart	kft1963@hotmail.com	RobHart1	Rob Hart
Contractor Phil Jones	Topps_1960@hotmail.com	PhilJones	Phil Jones
Contractor James Breakfast	steve.turvey@iamproperty.com	JamesBreakfast	James Cafeconstruction
david morgan	zagg.dave@gmail.com	MorganContracting	Morgan Contracting
Contractor Sodor Construction	zagg.dave@gmail.com	SodorConstruction	Sodor Construction
<input checked="" type="checkbox"/> Contractor DM Electrics	zagg.dave@gmail.com	DMElectrics	DM Electrics
Contractor Blenkiron	zagg.dave@gmail.com	Blenkiron	Blenkiron
<input checked="" type="checkbox"/> Contractor DaMor Gardening	zagg.dave@gmail.com	DaMorGardening	DaMor Gardening
Contractor Trotters independent Traders	Trotters@test.com	TrottersindependentTrad...	Trotters independent Tra...

7

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



To Edit a Contractor User

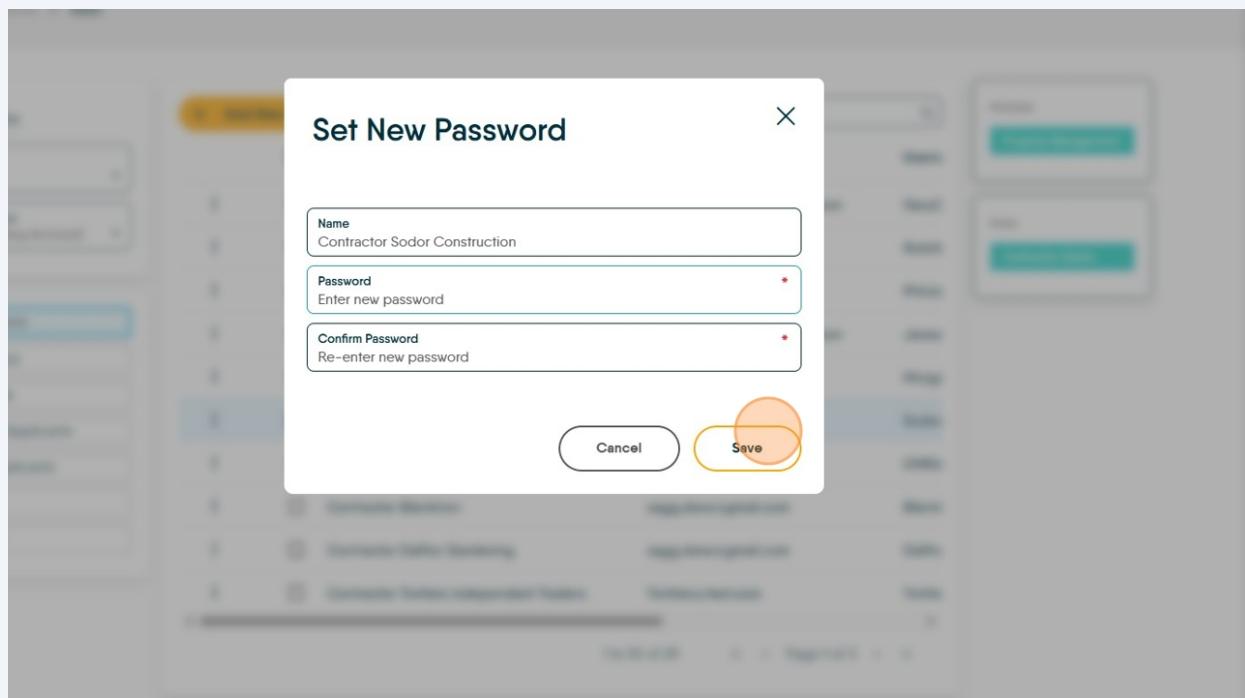
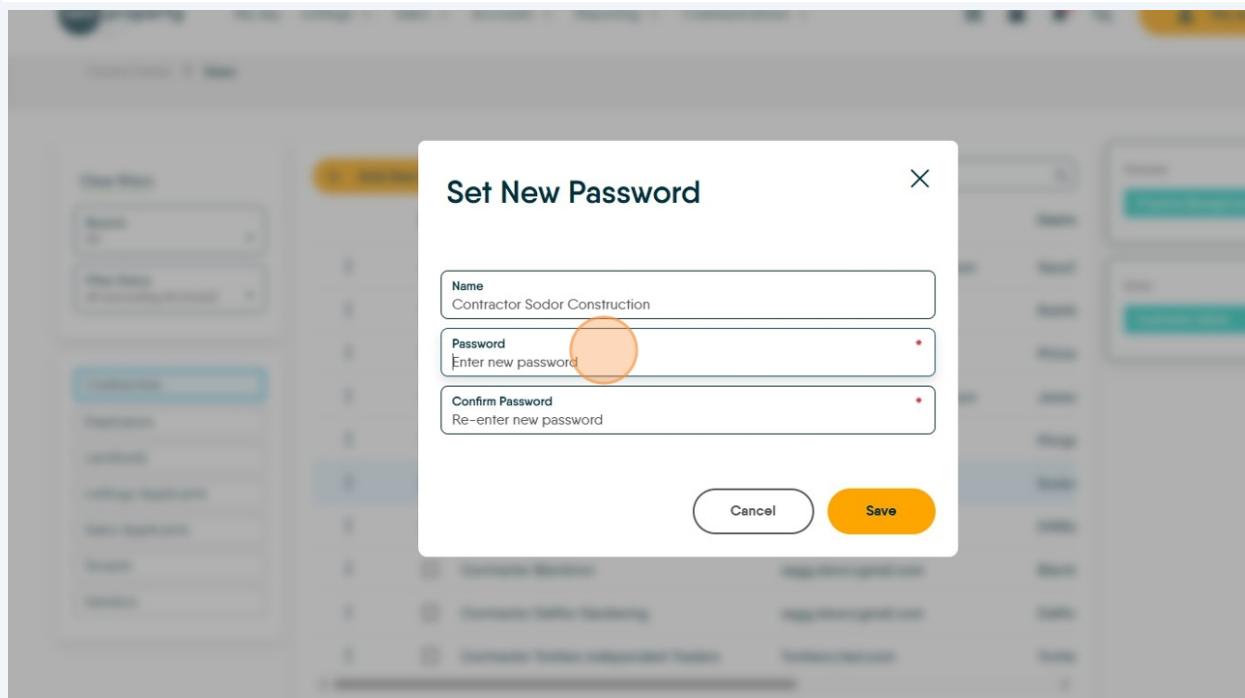
8 Click here.

The screenshot shows a software interface for managing users. On the left, there are filters for 'Branch' (All) and 'Filter Status' (All (excluding Archived)). Below these are buttons for 'Contractors', 'Employees', 'Landlords', 'Lettings Applicants', 'Sales Applicants', 'Tenants', and 'Vendors'. The main area displays a list of users with columns for 'Name', 'Email', and 'User'. A user named 'Contractor Sodor Construction' is highlighted with a red circle. The right sidebar lists 'Modules' including Accounts, Client Portals, Control Centre, E-Sign, Inspections, LetZone, Lettings, Property Management, Reporting Dashboard, Sales, and Sales Automation. It also lists 'Roles' including Administrator, Negotiator, and Branch 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.

The screenshot shows the same software interface as the previous one, but with a user named 'Contractor Sodor Construction' selected. A red circle highlights the 'View/Edit User' and 'Set Password' buttons for this user. The rest of the interface is identical to the previous screenshot, including the filters, toolbar, and sidebar.



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.

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	Rob
⋮	<input type="checkbox"/> Contractor Phil Jones	Topps_1960@hotmail.com	Phil
⋮	<input type="checkbox"/> Contractor James Breakfast	steve.turvey@iamproperty.com	Jam
⋮	<input type="checkbox"/> david morgan	zagg.dave@gmail.com	Mor
⋮	<input checked="" type="checkbox"/> Contractor Sodor Construction	zagg.dave@gmail.com	Sod
⋮	<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

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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	Rob
⋮	<input type="checkbox"/> Contractor Phil Jones	Topps_1960@hotmail.com	Phil
⋮	<input type="checkbox"/> Contractor James Breakfast	steve.turvey@iamproperty.com	Jam
⋮	<input type="checkbox"/> david morgan	zagg.dave@gmail.com	Mor
⋮	<input checked="" type="checkbox"/> Contractor Sodor Construction	zagg.dave@gmail.com	Sod
⋮	<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

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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"

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

View/Edit User Set Password

	Name	Email	Username	Com
⋮	□ Gary Cox Handyman	steve.turvey@iamproperty...	GaryCox1	Gary
⋮	□ Contractor Rob Hart	kft1963@hotmail.com	RobHart1	Rob
⋮	□ Contractor Phil Jones	Topps_1960@hotmail.com	PhilJones	Phil
⋮	□ Contractor James Breakfast	steve.turvey@iamproperty...	JamesBreakfast	James
⋮	□ david morgan	zagg.dave@gmail.com	MorganContracting	Morg
⋮	□ Contractor Sodor Construction	zagg.dave@gmail.com	SodorConstruction	Sodc
⋮	□ Contractor DM Electrics	zagg.dave@gmail.com	DMElectrics	DM E
⋮	□ Contractor Blenkiron	zagg.dave@gmail.com	Blenkiron	Blenl
⋮	□ Contractor DaMor Gardening	zagg.dave@gmail.com	DaMorGardening	DaM
⋮	□ Contractor Trotters independent Traders	Trotters@test.com	TrottersindependentTrad...	Trott

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