

Emailing Property Management Username Details to Contractors in iamproperty CRM

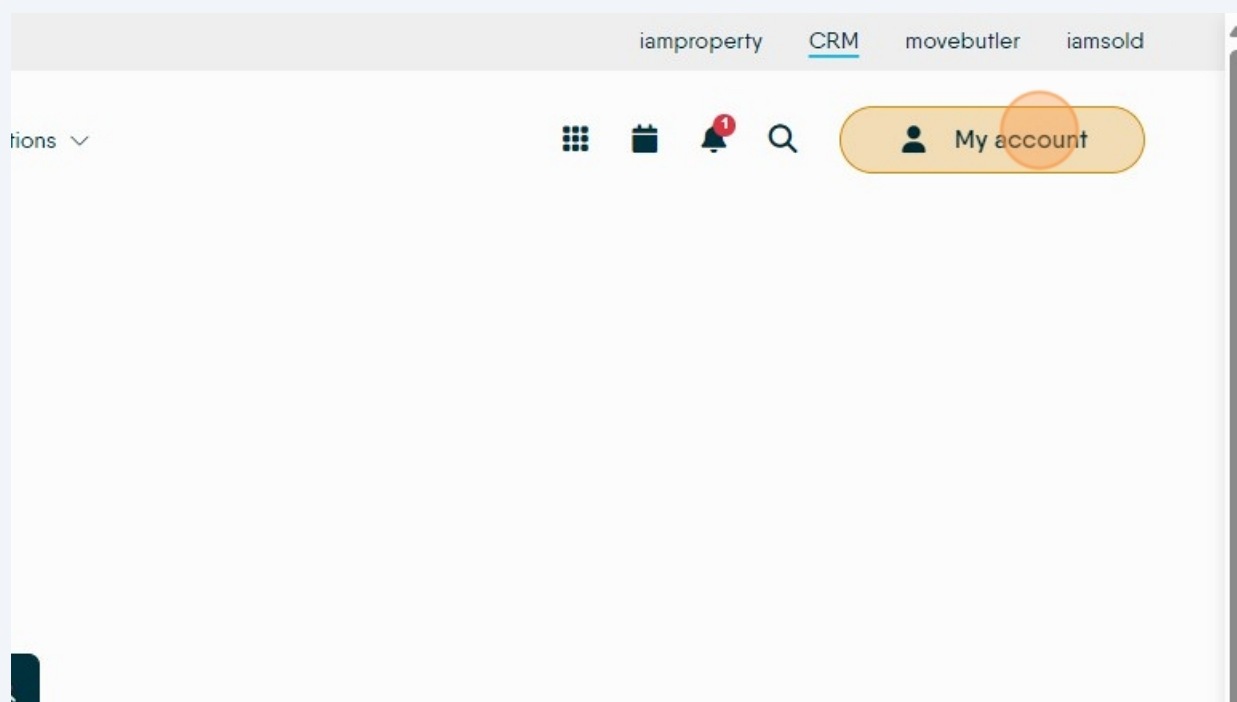


This guide provides a straightforward process for efficiently emailing Property Management login details to contractors within the iamproperty CRM system.

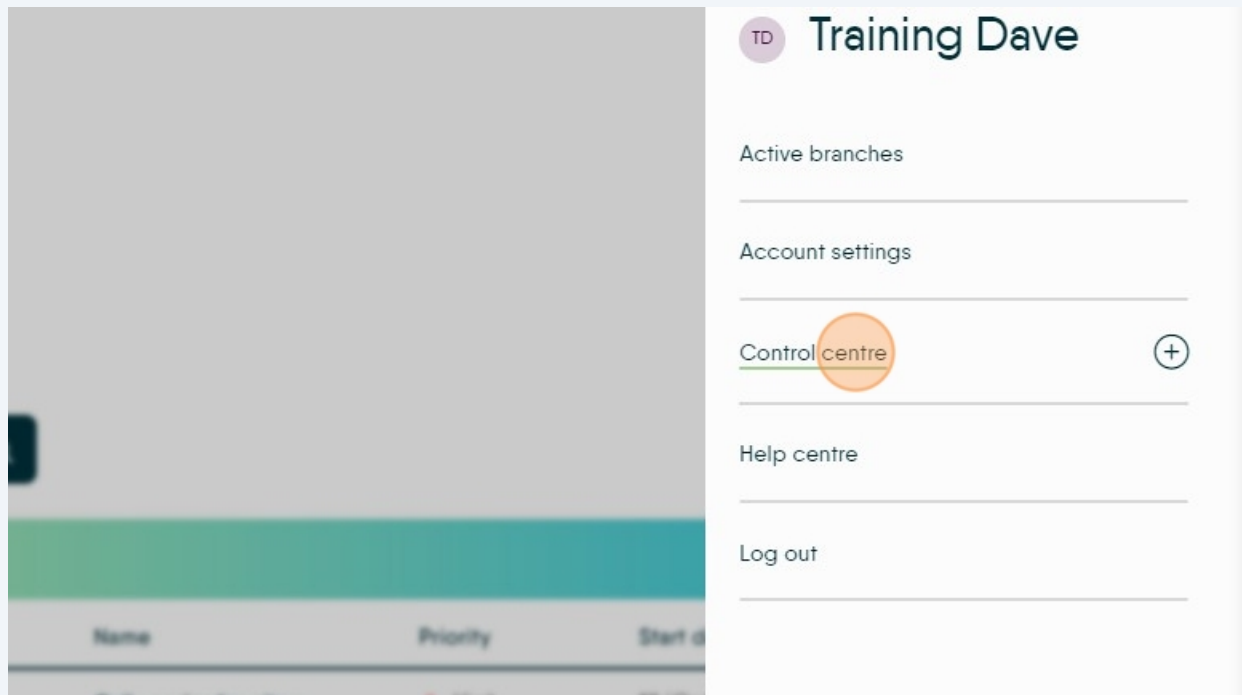
By following the steps outlined, users can quickly ensure the contractors are sent their Usernames. This is essential for maintaining effective relationships and facilitating smooth operations in property management.

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

- 2 Click "My Account"



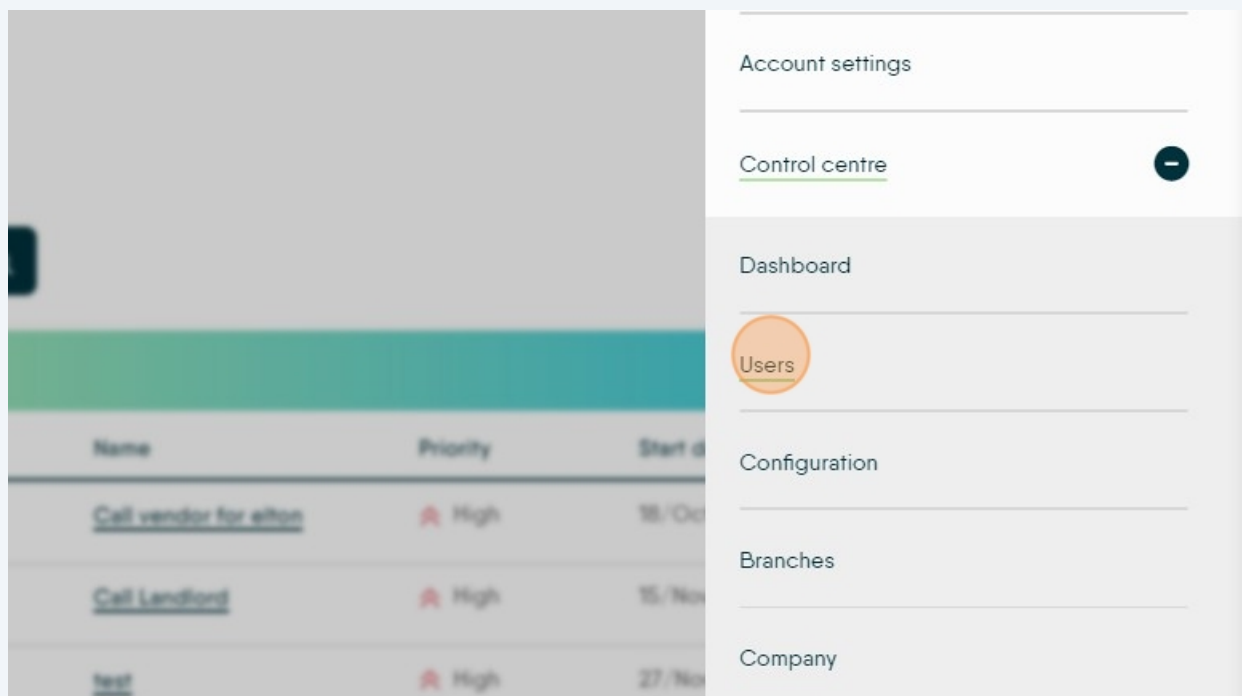
3 Click "Control centre"



The screenshot shows a user profile for 'Training Dave' (TD). The profile page has a sidebar menu on the right with the following items: 'Active branches', 'Account settings', 'Control centre' (highlighted with an orange circle and a plus icon), 'Help centre', and 'Log out'. The main content area on the left is mostly greyed out, but a table header is visible at the bottom with columns 'Name', 'Priority', and 'Start d'.

Name	Priority	Start d
Call vendor for elton	High	18/Oct
Call Landlord	High	15/Nov
test	High	27/Nov

4 Click "Users"



The screenshot shows the 'Control centre' dropdown menu. The menu is open, showing a list of options: 'Account settings', 'Control centre' (with a minus icon), 'Dashboard', 'Users' (highlighted with an orange circle), 'Configuration', 'Branches', and 'Company'. The main content area on the left is mostly greyed out, but a table header is visible at the bottom with columns 'Name', 'Priority', and 'Start d'.

Name	Priority	Start d
Call vendor for elton	High	18/Oct
Call Landlord	High	15/Nov
test	High	27/Nov

5 Click "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

	Name	Email
<input checked="" type="checkbox"/>	VTUK USER	ClientTraining@vtuk.com
<input type="checkbox"/>	Ian Henry	ian.henry@iamproperty.co.uk
<input type="checkbox"/>	David-George Morgan	DGL.david.morgan@iamproperty.co.uk
<input type="checkbox"/>	Topsy Turvey	steve.turvey@vtuk.com
<input type="checkbox"/>	Training Dave	david.morgan@iamproperty.co.uk
<input type="checkbox"/>	Christian Bale	cbtest@vtuk.com
<input type="checkbox"/>	Natalie Portman	nttest@vtuk.com
<input type="checkbox"/>	Dan Carter	DC1@hotmail.co.uk
<input type="checkbox"/>	Owen Farrell	O512@hotmail.co.uk

6 Once in the Contractors screen you can either, click the checkbox at the top of the screen to select all Contractor records. Or, click this checkbox to select an individual Contractor record.

iam property

My day Lettings Sales Accounts Reporting Communications

Control Centre > Users

Clear filters

Branch
All

Filter Status
All (excluding Archived)

Contractors

Employees

+ Add New User Register Portal Users Email Details

<input checked="" type="checkbox"/>	Name	Email
<input type="checkbox"/>	Gary Cox Handyman	steve@iamproperty.co.uk
<input type="checkbox"/>	Contractor Rob Hart	kft19@iamproperty.co.uk
<input type="checkbox"/>	Contractor Phil Jones	Topsy@iamproperty.co.uk
<input type="checkbox"/>	Contractor James Breakfast	steve@iamproperty.co.uk
<input type="checkbox"/>	David Morgan	dmorgan@iamproperty.co.uk

Contractors

Employees

Landlords

Lettings Applicants

Sales Applicants

Tenants

Vendors

⋮	<input type="checkbox"/>	Contractor Rob Hart	kft1963
⋮	<input type="checkbox"/>	Contractor Phil Jones	Topps
⋮	<input type="checkbox"/>	Contractor James Breakfast	steve.t
⋮	<input type="checkbox"/>	david morgan	zagg.c
⋮	<input type="checkbox"/>	Contractor Sodor Construction	zagg.c
⋮	<input checked="" type="checkbox"/>	Contractor DM Electrics	zagg.c
⋮	<input type="checkbox"/>	Contractor Blenkiron	zagg.c
⋮	<input type="checkbox"/>	Contractor DaMor Gardening	zagg.c
⋮	<input type="checkbox"/>	Contractor Trotters independent Traders	Trotter

7

Then click "Email Details" this will send all Contractors an email with their Username.

ngs

Sales

Accounts

Reporting

Communications

Send Details to Users

Add New User

Register Portal Users

Email Details

Search

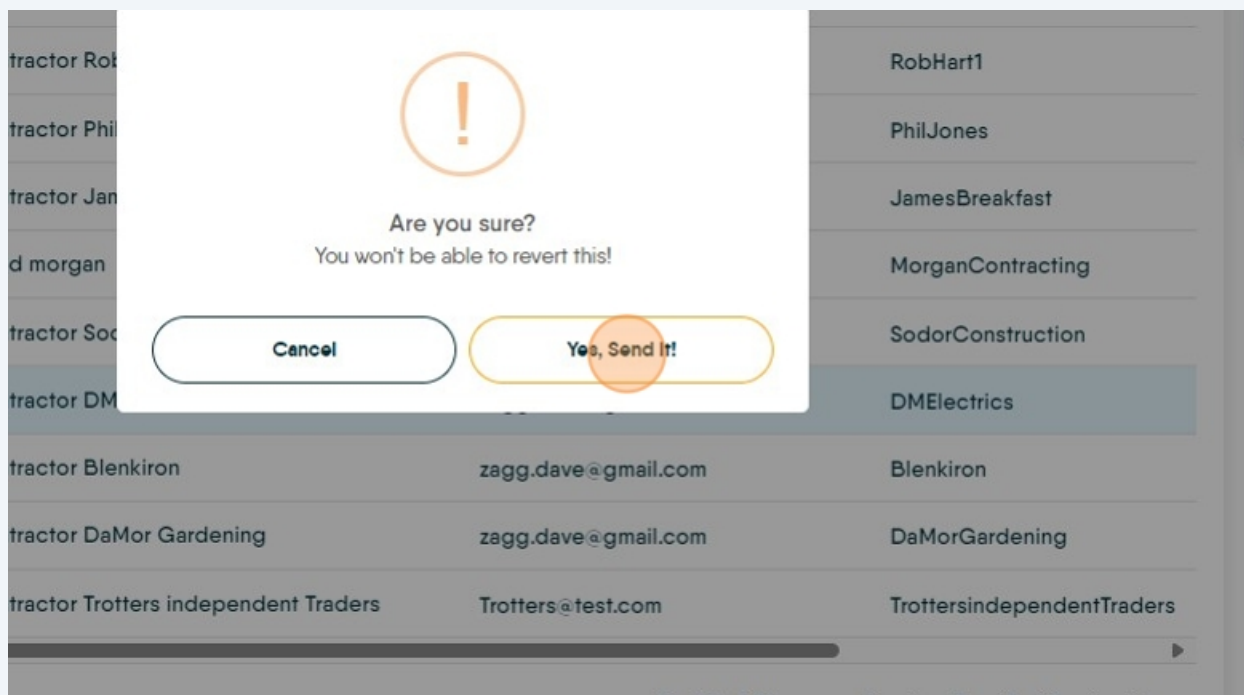
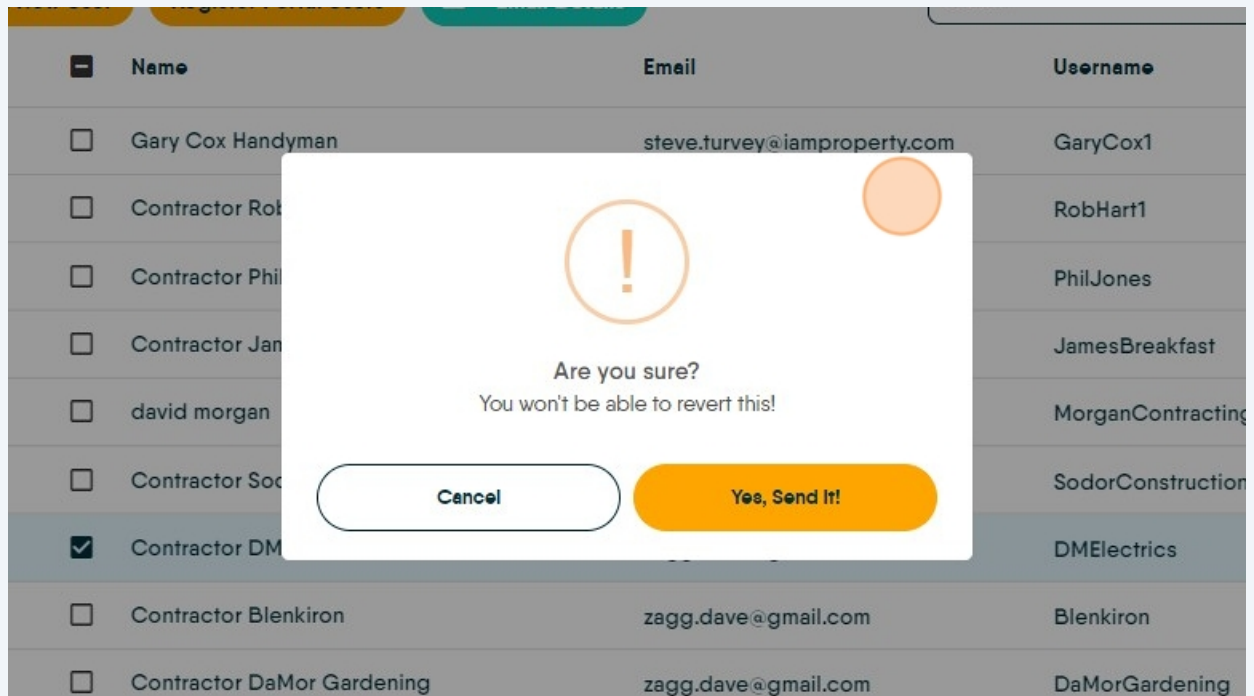
	Name	Email	Username
⋮	<input type="checkbox"/> Gary Cox Handyman	steve.turvey@iamproperty.com	GaryCox1
⋮	<input type="checkbox"/> Contractor Rob Hart	kft1963@hotmail.com	RobHart1
⋮	<input type="checkbox"/> Contractor Phil Jones	Topps_1960@hotmail.com	PhilJones
⋮	<input type="checkbox"/> Contractor James Breakfast	steve.turvey@iamproperty.com	JamesBro



Alert! If the Contractor already has a login for the Property Management Contractor Portal sending this message will override the existing login.

8

Click here to send the email.
Click "Yes, Send it!"



9

The Email received by your Contractor will look like this.

