

Adding a New User to iamproperty CRM

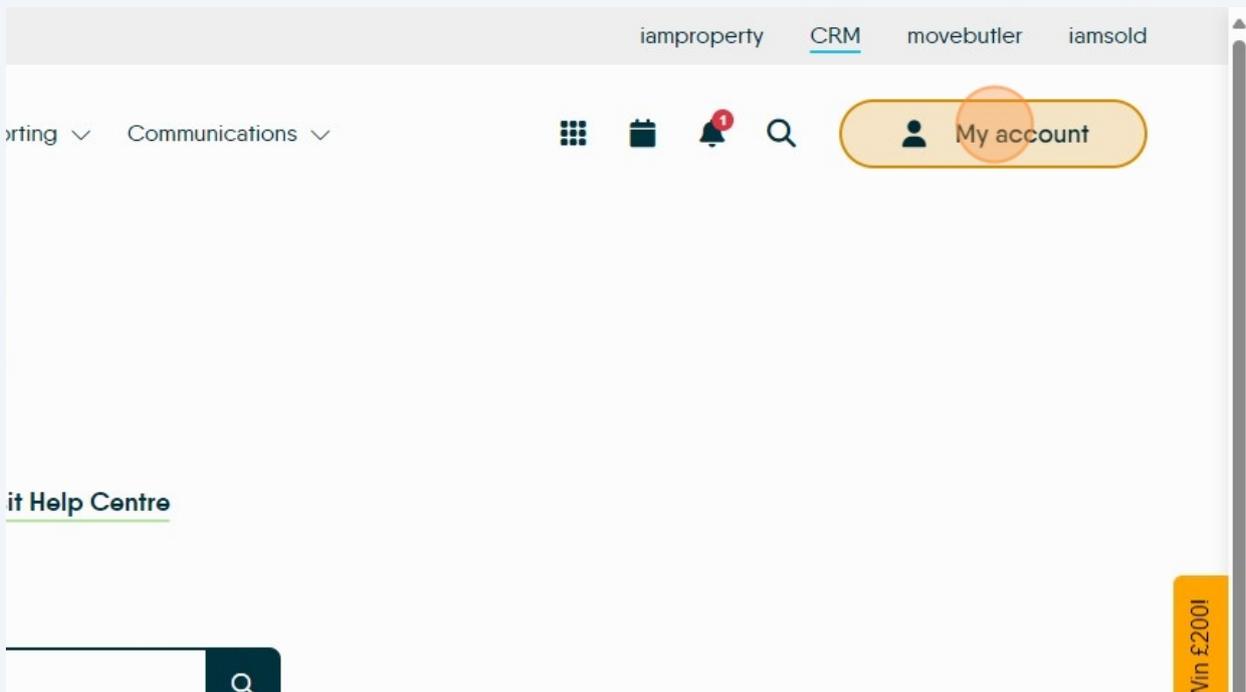


This guide provides a straightforward process for adding new users to the iamproperty CRM, ensuring proper account setup and module access.

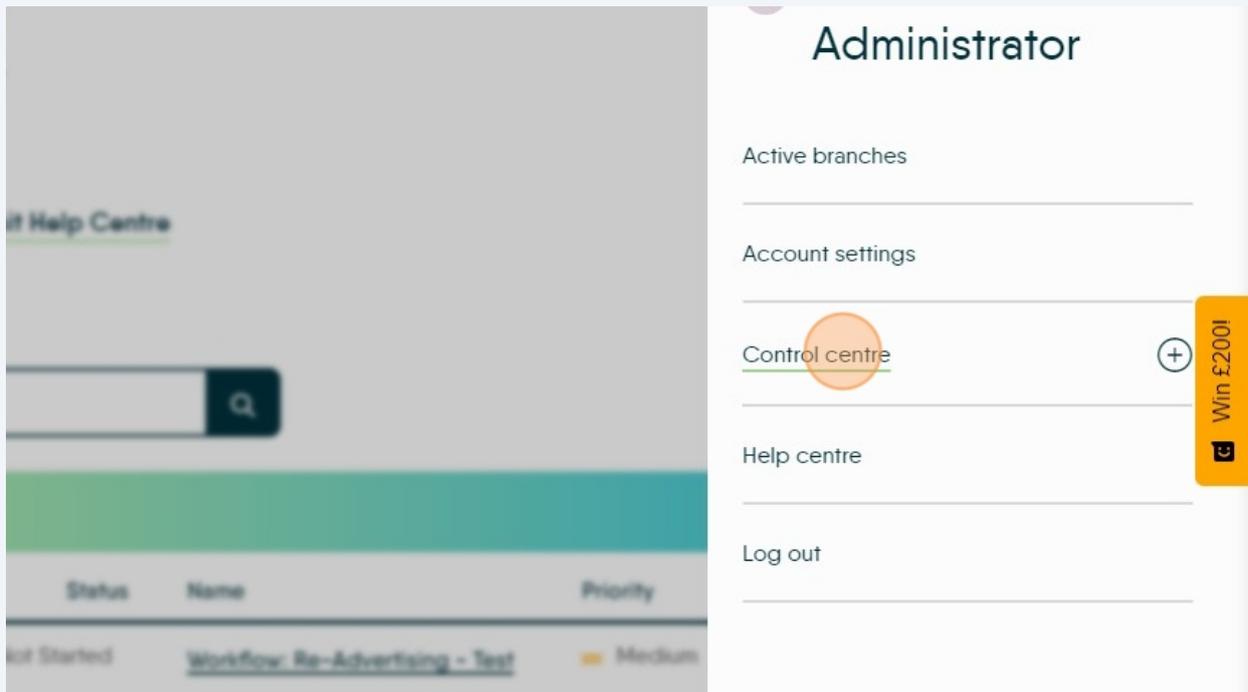
Following these steps helps streamline user management in your organisation, enhancing collaboration and efficiency. It's essential for administrators who want to maintain control over user permissions and optimise the CRM's functionality. By utilising this guide, you can ensure a smooth onboarding experience for new users.

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

2 Click "My Account"

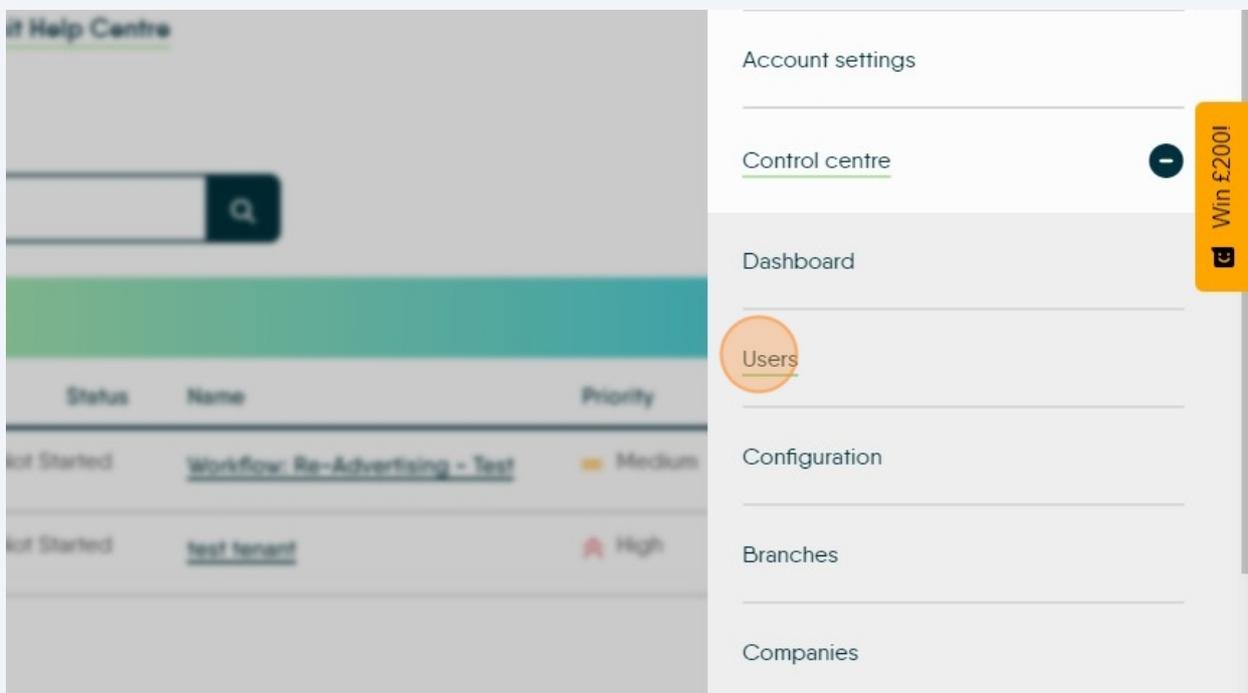


3 Click "Control centre"



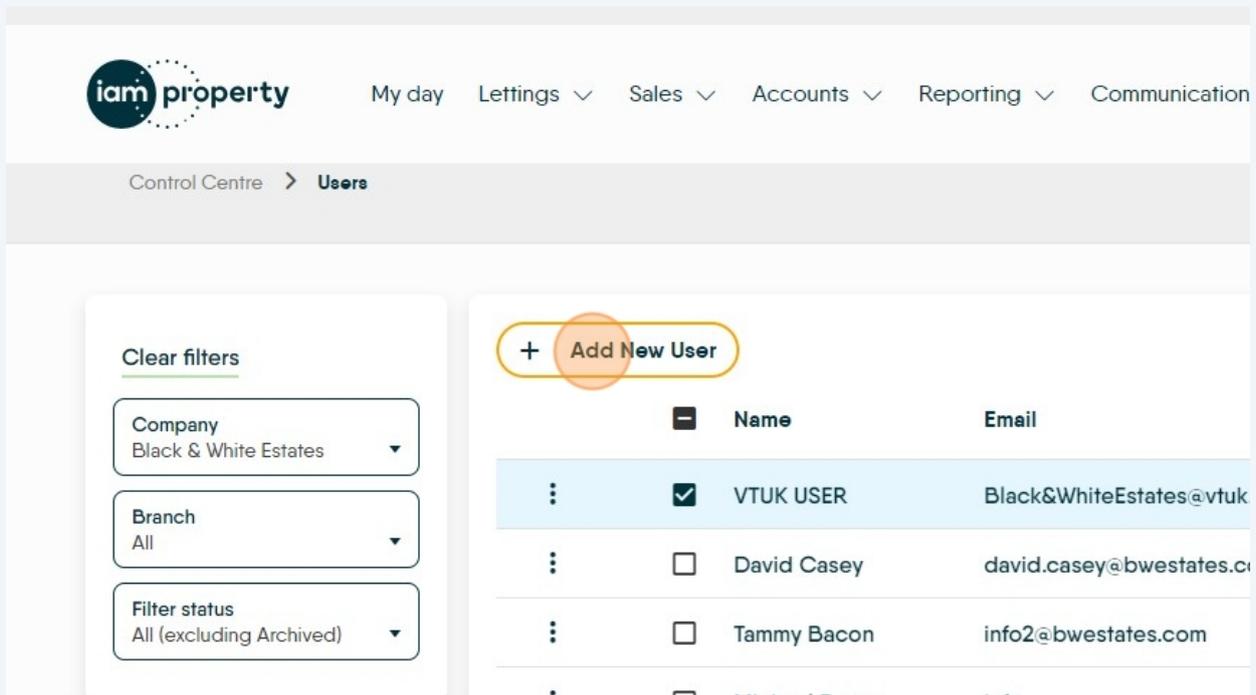
The screenshot shows the Administrator interface. On the left, a blurred view of a help centre page is visible, featuring a search bar and a table with columns for Status, Name, and Priority. The table contains two rows: one for 'Workflow: Re-Advertising - Test' with a Medium priority, and another for 'test tenant' with a High priority. On the right, the Administrator menu is displayed with the title 'Administrator'. The menu items are: Active branches, Account settings, Control centre (highlighted with an orange circle and a plus icon), Help centre, and Log out. A yellow banner on the right side of the menu reads 'Win £200!'.

4 Click "Users"

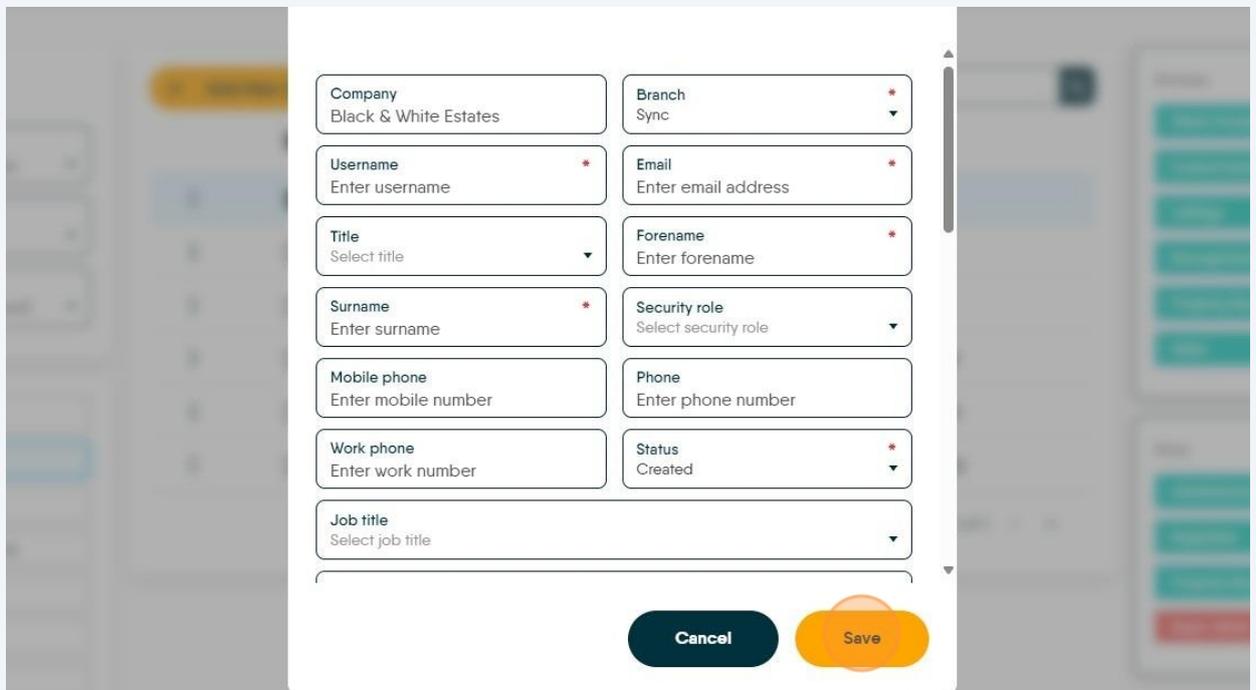


The screenshot shows the Administrator interface. On the left, a blurred view of a help centre page is visible, featuring a search bar and a table with columns for Status, Name, and Priority. The table contains two rows: one for 'Workflow: Re-Advertising - Test' with a Medium priority, and another for 'test tenant' with a High priority. On the right, the Administrator menu is displayed with the title 'Administrator'. The menu items are: Account settings, Control centre (with a minus icon), Dashboard, Users (highlighted with an orange circle), Configuration, Branches, and Companies. A yellow banner on the right side of the menu reads 'Win £200!'.

5 Click "Add New User"



6 Complete the fields, minimum required are the fields with a red star. It is good practice to add as much detail as possible.



7 Click here.

The screenshot shows a user management interface. On the left, there are filter sections. The first section, titled "Clear filters", contains three dropdown menus: "Company" (set to "Black & White Estates"), "Branch" (set to "All"), and "Filter status" (set to "All (excluding Archived)"). Below this is a list of user categories: "Contractors", "Employees" (highlighted with a blue border), and "Landlords". On the right, there is a table with a header "Add New User" and columns for "Name" and "Email". The table lists several users, with "VTUK USER" selected (checkbox checked). The user "David Casey" is highlighted with a blue background, and its menu icon (three vertical dots) is circled in orange.

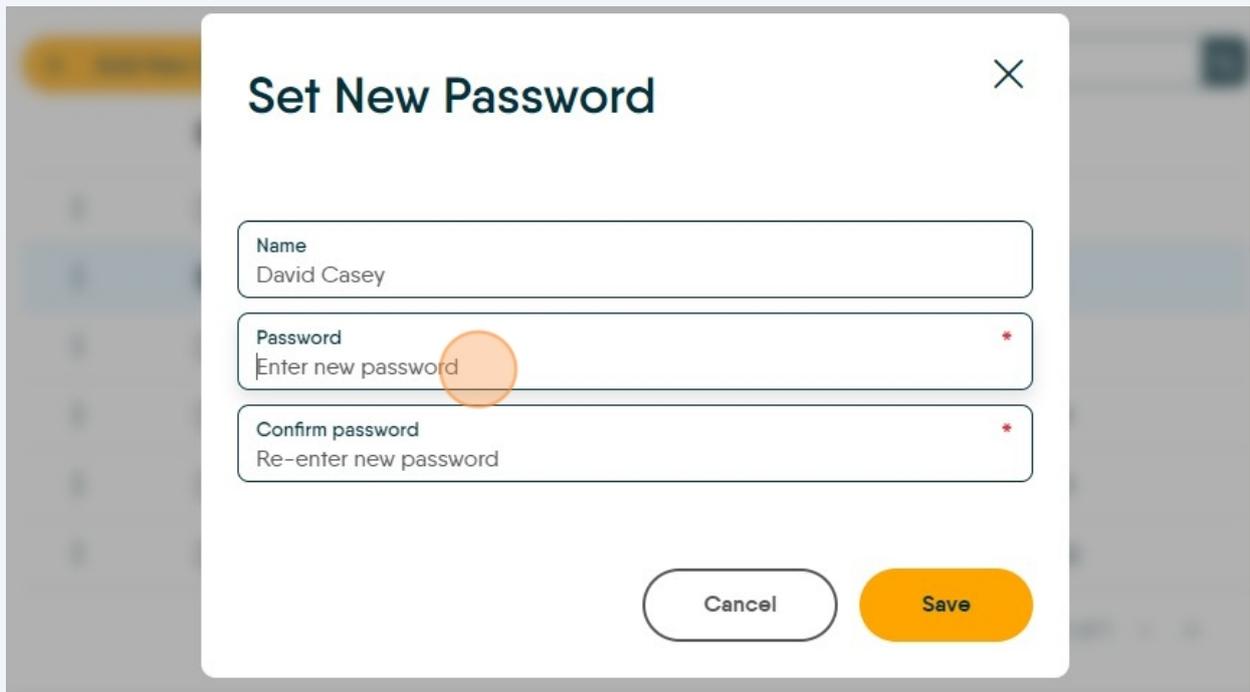
	Name	Email
<input checked="" type="checkbox"/>	VTUK USER	Black&WhiteEstates@vtuk
<input type="checkbox"/>	David Casey	david.casey@bwestates.co
<input type="checkbox"/>	Tammy Bacon	info2@bwestates.com
<input type="checkbox"/>	Michael Bacon	info
<input type="checkbox"/>	Vicky Funnell	info@bwestates5
<input type="checkbox"/>	Ronald Willcox	Info6@bwestates.com

8 Click "Set Password"

This screenshot is similar to the previous one, but the "Employees" category is no longer highlighted. The user "David Casey" is now selected (checkbox checked). A context menu is open over the "Set Password" option, which is circled in orange. The menu also includes "Login As" and "View/Edit User".

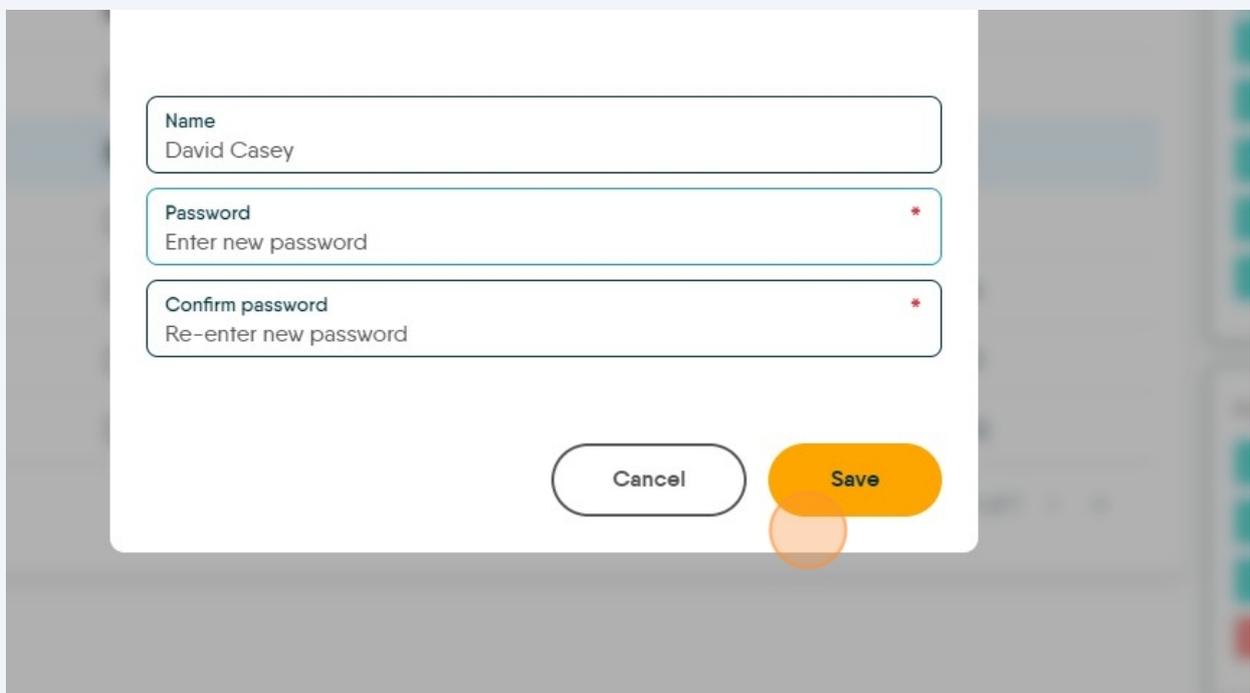
	Name	Email
<input type="checkbox"/>	VTUK USER	Black&WhiteEstates@vtuk
<input checked="" type="checkbox"/>	David Casey	david.casey@bwestates.co
<input type="checkbox"/>	Tammy Bacon	info2@bwestates.com
<input type="checkbox"/>	Michael Bacon	info
<input type="checkbox"/>	Vicky Funnell	info@bwestates5
<input type="checkbox"/>	Ronald Willcox	Info6@bwestates.com

9 Click the "Password" field.



The screenshot shows a white dialog box titled "Set New Password" with a close button (X) in the top right corner. It contains three input fields: "Name" with the value "David Casey", "Password" with the placeholder "Enter new password" and a red asterisk, and "Confirm password" with the placeholder "Re-enter new password" and a red asterisk. Below the fields are two buttons: "Cancel" and "Save". An orange circle highlights the "Password" input field.

10 Click here to save the password.



This screenshot is identical to the previous one, showing the "Set New Password" dialog box. In this view, an orange circle highlights the "Save" button at the bottom right of the dialog.



Once the User account is created, ensure that the correct CRM modules are enabled on the account.

11

Click here. Green modules are enabled, click on the Red modules to enable them. The enabled option will be green, click these to disable (the option turns red).

The screenshot displays a user management interface. At the top, there are two orange buttons: '+ Add New User' and 'Register Portal Users', followed by a search bar. Below this is a table of users with columns for Name, Email, and Username. The user 'David-George Morgan' is selected, indicated by a blue highlight and a checked checkbox. To the right of the table is a 'Modules' sidebar with a list of options: Client Portals, E-Sign, Inspections, LetZone, Lettings, Property Management, Reporting Dashboard, Sales, Accounts, Control Centre, and SalesAutomation. The first seven modules are green, while the last four are red. An orange circle highlights the 'Reporting Dashboard' module. Below the modules is a 'Roles' sidebar with options: Administrator, Negotiator, and Property Manager. The bottom of the interface shows pagination: '1 to 10 of 23' and 'Page 1 of 3'.

	Name	Email	Username
⋮	<input type="checkbox"/> VTUK USER	ClientTraining@vtuk.com	VTUKUSER292
⋮	<input type="checkbox"/> Ian Henry	ian.henry@iamproperty.com	HenryI
⋮	<input checked="" 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