

Sending Contractor Portal Login Email to Contractors in CRM



1

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

iam property

My day Lettings Sales Accounts Reporting Communications

My account

Welcome back, Training

+ Add New Record

View Property Management

Visit Help Centre

Search all records

Today's events

Time	Name
12:00	Test test

My tasks

Status	Name	Priority	Start date	Due date
Not Started	Call Landlord	High	15/Nov/2024	15/Nov/2024
Not Started	test	High	27/Nov/2024	27/Nov/2024
Not Started	Call Landlord	Medium	12/Dec/2024	12/Dec/2024
Not Started	Call back	High	03/Jan/2025	03/Jan/2025

2 Click "My Account"

The screenshot shows the 'My account' dropdown menu open. The menu contains the following items:

- Active branches
- Account settings
- Control centre** (highlighted with an orange circle)
- Help centre
- Log out

The background of the page shows the 'Welcome back, Training' header, a 'Add New Record' button, and links for 'View Property Management' and 'Visit Help Centre'. Below these are sections for 'My events' and 'My tasks'.

Status	Name	Priority	Start date	Due date
Not Started	Call Landlord	High	15/Nov/2024	15/Nov/2024
Not Started	test	High	27/Nov/2024	27/Nov/2024
Not Started	Call Landlord	Medium	12/Dec/2024	12/Dec/2024

3 Click "Control centre"

The screenshot shows the 'Control centre' page. The page has a header with 'Welcome back, Training' and a navigation bar with 'My day', 'Lettings', 'Sales', 'Accounts', 'Reporting', and 'Communications'. The main content area is divided into two sections: 'My events' and 'My tasks'.

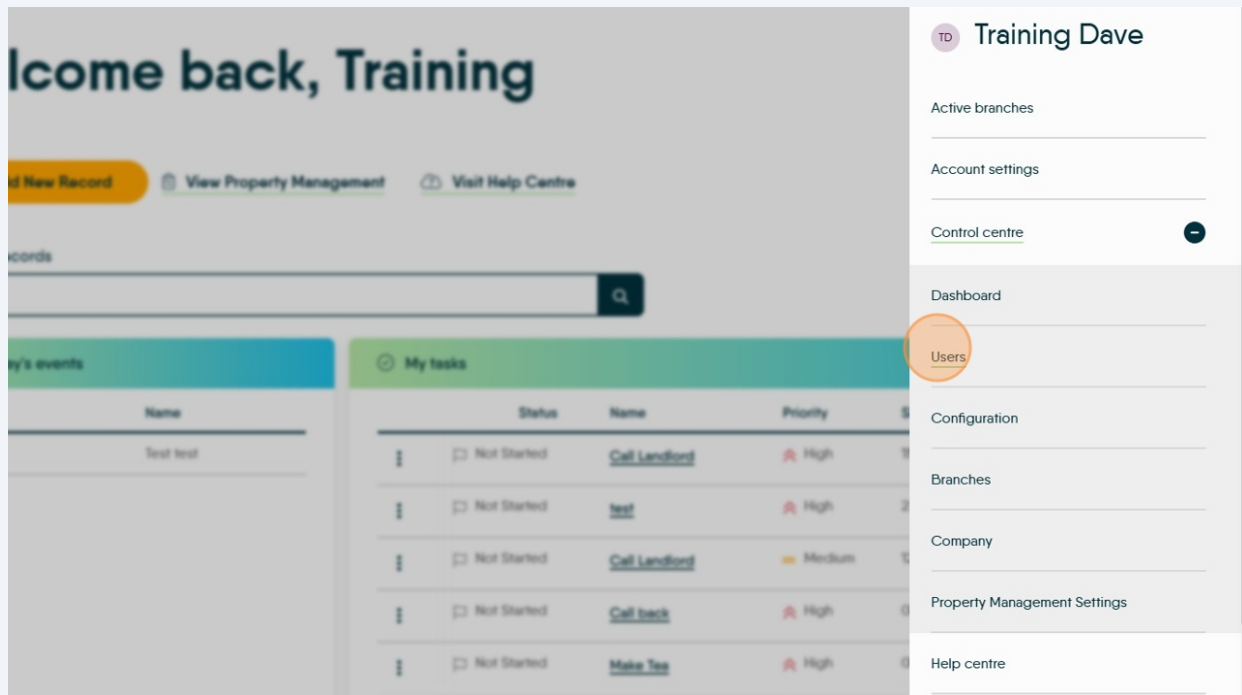
The 'My events' section contains a table with the following data:

Name
Test test

The 'My tasks' section contains a table with the following data:

Status	Name	Priority	Start date	Due date
Not Started	Call Landlord	High	15/Nov/2024	15/Nov/2024
Not Started	test	High	27/Nov/2024	27/Nov/2024
Not Started	Call Landlord	Medium	12/Dec/2024	12/Dec/2024

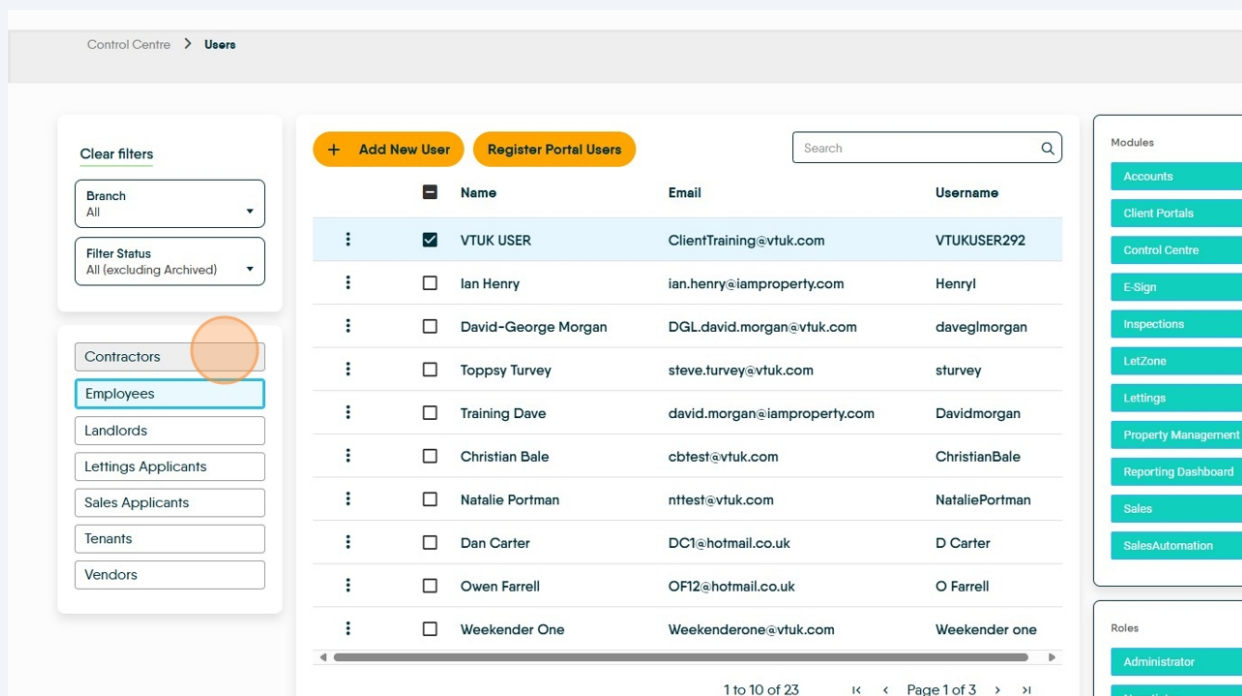
4 Click "Users"



The screenshot shows a dashboard for 'Training Dave'. The sidebar on the right contains the following menu items: Active branches, Account settings, Control centre, Dashboard, **Users** (highlighted with an orange circle), Configuration, Branches, Company, Property Management Settings, and Help centre. The main content area shows a 'Welcome back, Training' message and a 'My tasks' table.

Status	Name	Priority
Not Started	Call Landlord	High
Not Started	test	High
Not Started	Call Landlord	Medium
Not Started	Call back	High
Not Started	Make Tea	High

5 Click "Contractors"



The screenshot shows the 'Users' page. The left sidebar has a 'Clear filters' section with 'Branch' set to 'All' and 'Filter Status' set to 'All (excluding Archived)'. Below this, a list of user categories is shown: Contractors (highlighted with an orange circle), Employees, Landlords, Lettings Applicants, Sales Applicants, Tenants, and Vendors. The main content area displays a table of users with columns for Name, Email, and Username. The first row, 'VTUK USER', is selected.

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

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6 Click the checkbox next to the contractor you wish to send the email to.

The screenshot shows the iamproperty CRM interface. The top navigation bar includes 'iamproperty', 'CRM', and 'movebutler'. The main header has 'Control Centre > Users'. On the left, there are filter options 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 contains three buttons: '+ Add New User', 'Register Portal Users', and 'Email Details' (highlighted with an orange circle). A search bar is next to these buttons. Below the buttons is a table with columns: Name, Email, and User. The table lists several contractors, including Gary Cox Handyman, Contractor Rob Hart, Contractor Phil Jones, Contractor James Breakfast, david morgan, Contractor Sodor Construction, Contractor DM Electrics, Contractor Blenkiron, and Contractor DaMor Gardening. Each row has a checkbox in the 'Name' column. The 'Email Details' button is highlighted with an orange circle.

Name	Email	User
☐ Gary Cox Handyman	steve.turvey@iamproperty.com	Gary
☐ Contractor Rob Hart	kft1963@hotmail.com	Robl
☐ Contractor Phil Jones	Topps_1960@hotmail.com	PhilJ
☐ Contractor James Breakfast	steve.turvey@iamproperty.com	Jam
☐ david morgan	zagg.dave@gmail.com	Mor
☐ Contractor Sodor Construction	zagg.dave@gmail.com	Sodr
☐ Contractor DM Electrics	zagg.dave@gmail.com	DME
☐ Contractor Blenkiron	zagg.dave@gmail.com	Blen
☐ Contractor DaMor Gardening	zagg.dave@gmail.com	DaM

7 Click "Email Details"

The screenshot shows the iamproperty CRM interface. The top navigation bar includes 'iamproperty', 'CRM', 'movebutler', and 'iamsold'. The main header has 'Control Centre > Users'. On the left, there are filter options 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 contains three buttons: '+ Add New User', 'Register Portal Users', and 'Email Details' (highlighted with an orange circle). A search bar is next to these buttons. Below the buttons is a table with columns: Name, Email, and User. The table lists several contractors, including Gary Cox Handyman, Contractor Rob Hart, Contractor Phil Jones, Contractor James Breakfast, david morgan, Contractor Sodor Construction, Contractor DM Electrics, Contractor Blenkiron, and Contractor DaMor Gardening. Each row has a checkbox in the 'Name' column. The 'Email Details' button is highlighted with an orange circle. The 'david morgan' row is selected, and the 'Email Details' button is highlighted with an orange circle.

Name	Email	User
☐ Gary Cox Handyman	steve.turvey@iamproperty.com	Gary
☐ Contractor Rob Hart	kft1963@hotmail.com	Robl
☐ Contractor Phil Jones	Topps_1960@hotmail.com	PhilJ
☐ Contractor James Breakfast	steve.turvey@iamproperty.com	Jam
☒ david morgan	zagg.dave@gmail.com	Mor
☐ Contractor Sodor Construction	zagg.dave@gmail.com	Sodr
☐ Contractor DM Electrics	zagg.dave@gmail.com	DME
☐ Contractor Blenkiron	zagg.dave@gmail.com	Blen
☐ Contractor DaMor Gardening	zagg.dave@gmail.com	DaM

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Click "Yes, Send it!"

