

# Setting up an Email Signature in iamproperty CRM



This guide provides a straightforward process for setting up your email signature in the iamproperty CRM, ensuring your communications are professional and consistent.

By following the step-by-step instructions, you can enhance your email branding and improve your interactions with clients. It's essential for maintaining a polished image in the property management industry.

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

The screenshot shows the 'MyDay' dashboard in the iamproperty CRM. At the top, there is a navigation bar with the iamproperty logo, menu items (My day, Lettings, Sales, Accounts, Reporting, Communications), utility icons (grid, calendar, notifications, search), and a 'My account' button. Below the navigation bar, a large heading reads 'Welcome back, Training'. Underneath, there are three main action buttons: '+ Add New Record', 'View Property Management', and 'Visit Help Centre'. A search bar labeled 'Search all records' is positioned below these buttons. The dashboard is divided into two main sections: 'Today's events' and 'My tasks'. 'Today's events' is a table with columns for 'Time' and 'Name', showing two entries: '12:00 Test test' and '16:30 Viewing - 1 Park View Road, Witney, Oxfordshire, OX28 1GA'. 'My tasks' is a table with columns for 'Status', 'Name', 'Priority', 'Start date', and 'Due date', listing four tasks: 'Call Landlord' (High priority, due 15/Nov/2024), 'test' (High priority, due 27/Nov/2024), 'Call Landlord' (Medium priority, due 12/Dec/2024), and 'Call back' (High priority, due 03/Jan/2025).

Time	Name
12:00	Test test
16:30	Viewing - 1 Park View Road, Witney, Oxfordshire, OX28 1GA

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

## 2 Click "My account"

The screenshot shows the CRM dashboard with the 'My account' button highlighted in the top right navigation bar. The main content area displays a 'Welcome back, Training' message, 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'.

iamproperty CRM movebutler iamsold

erty My day Lettings Sales Accounts Reporting Communications

My account

# Welcome back, Training

Add New Record View Property Management Visit Help Centre

Records

My events

Name
Test test
Viewing - 1 Park View Road, Witney, Oxfordshire, OX28 1GA

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 CRM dashboard with the 'Control centre' option highlighted in the user profile menu. The main content area is dimmed, showing the 'Welcome back, Training' message and the 'My tasks' table.

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erty My day Lettings Sales Accounts Reporting Communications

My account

# Welcome back, Training

Add New Record View Property Management Visit Help Centre

Records

My events

My tasks

Status	Name	Priority
Not Started	Call Landlord	High
Not Started	test	High
Not Started	Call Landlord	Medium

Training Dave

Active branches

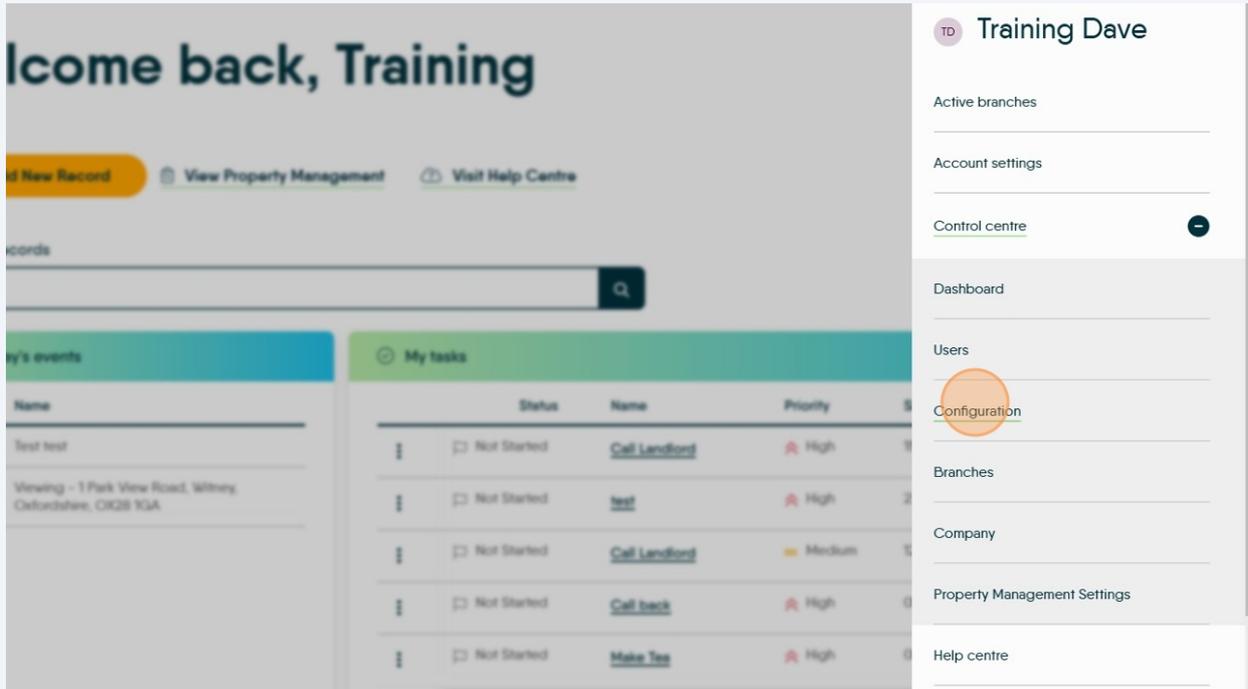
Account settings

Control centre (+)

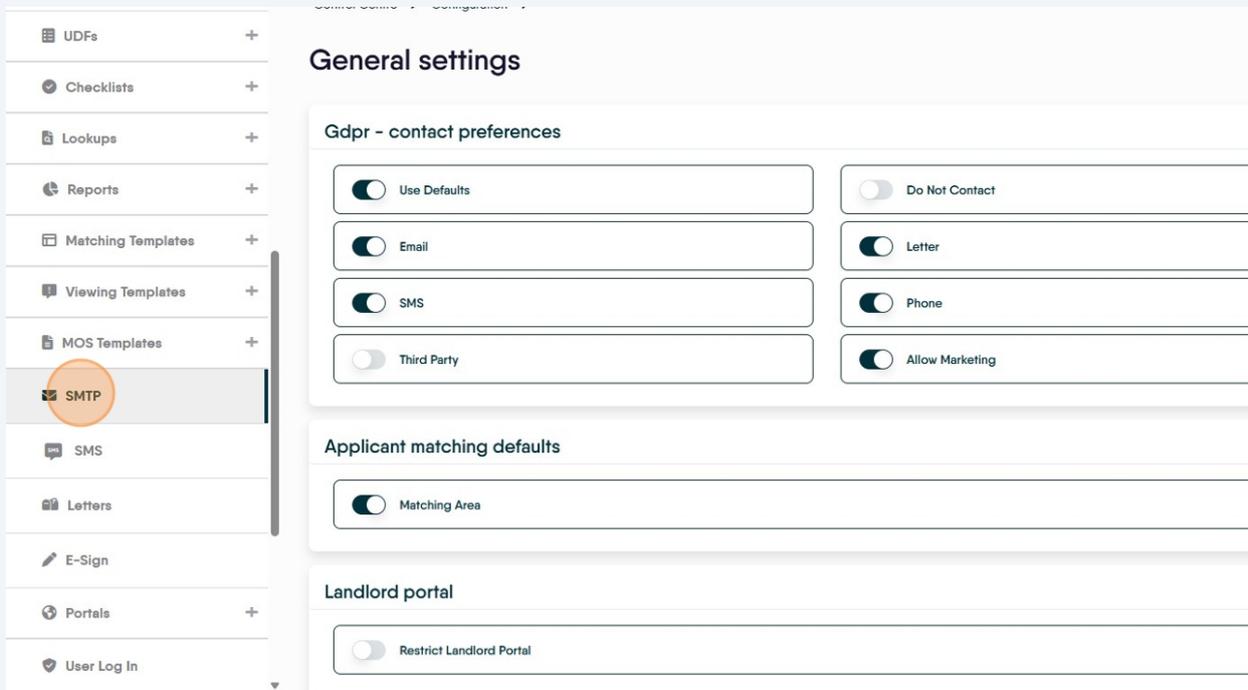
Help centre

Log out

4 Click "Configuration"



5 Click "SMTP"



## 6 Click "Edit Settings"

**Smtp configuration**

Provider: Select provider Apply SMTP Settings

**Branch SMTP Configuration**

<input type="checkbox"/>	Entry	Host	Port	Username	Active	
<input type="checkbox"/>	Morgan & Co	smtp.office365.c...	587	david.morgan@ia...	✓	<a href="#">Edit Settings</a>

**Branch User SMTP Configuration**

<input type="checkbox"/>	Entry	Host	Port	Username	Active	
<input type="checkbox"/>	David-Geo...	smtp.office365.c...	587	david.morgan@ia...	✓	<a href="#">Edit Settings</a>
<input type="checkbox"/>	Ian Johnson		0	ian.johnson@iam...	✗	<a href="#">Edit Settings</a>
<input type="checkbox"/>	James Mor...		0	iames@morgan.tc	✗	<a href="#">Edit Settings</a>

## 7 Click here into the area where the email text would be.

Account ☾

Send Test Email

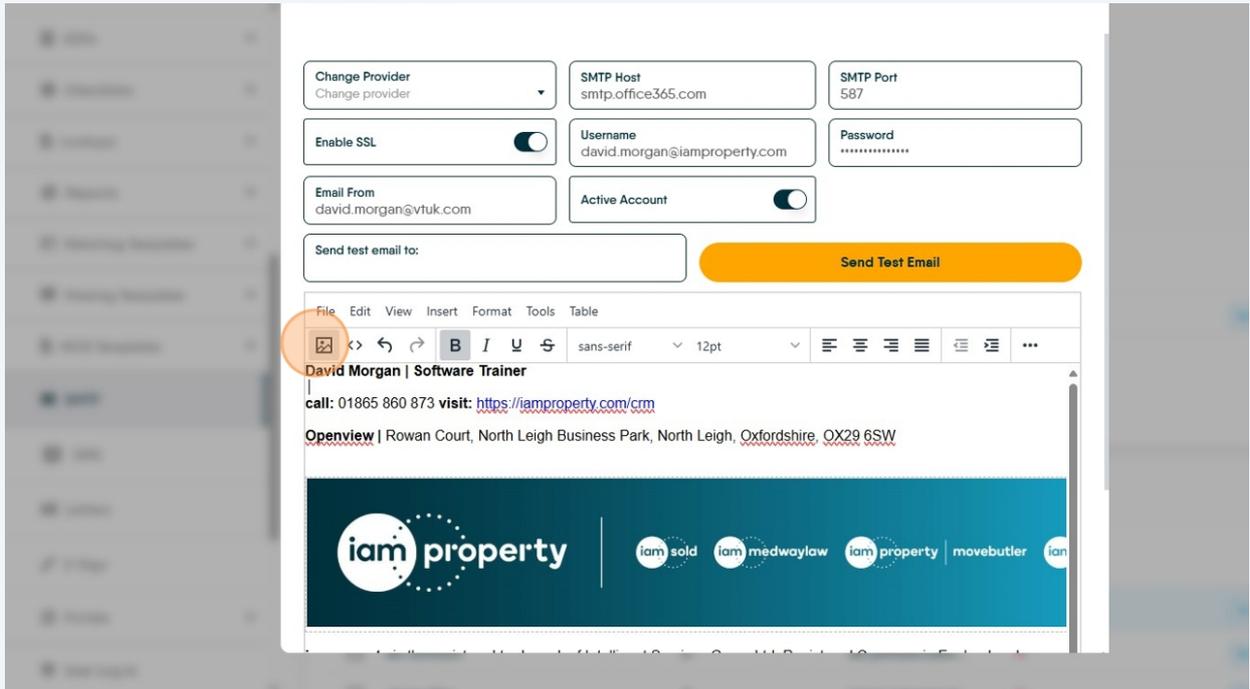
if 12pt

[/crm](#)

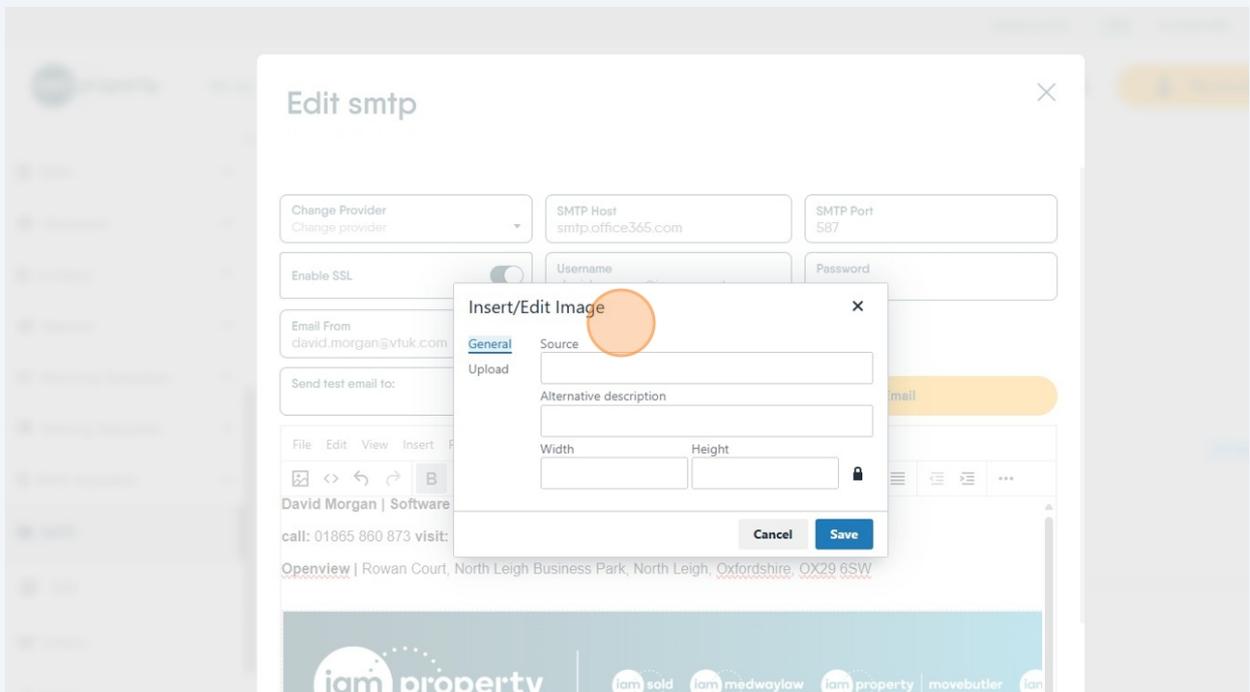
Park, North Leigh, [Oxfordshire](#), [OX29 6SW](#)

iam sold | iam medwaylaw | iam property | movebutler | iam

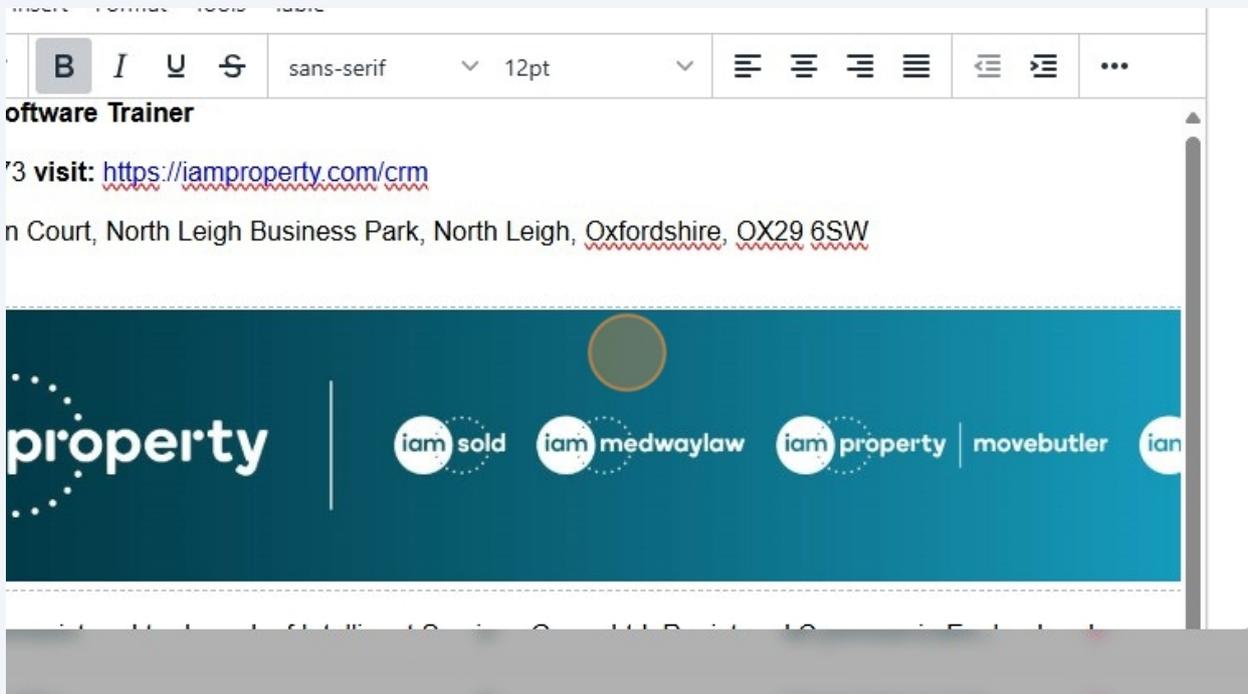
8 Click this icon.



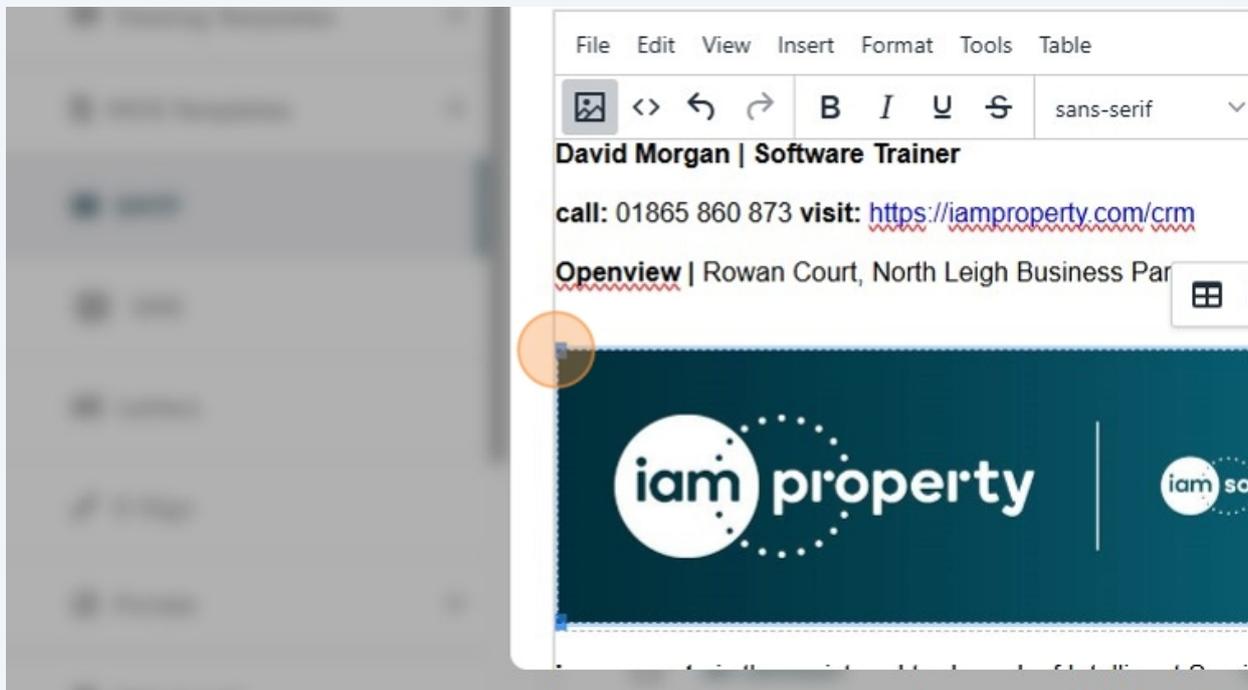
9 Click here. You can link to a source on the internet for your image or use the Upload option and upload one from your computer.



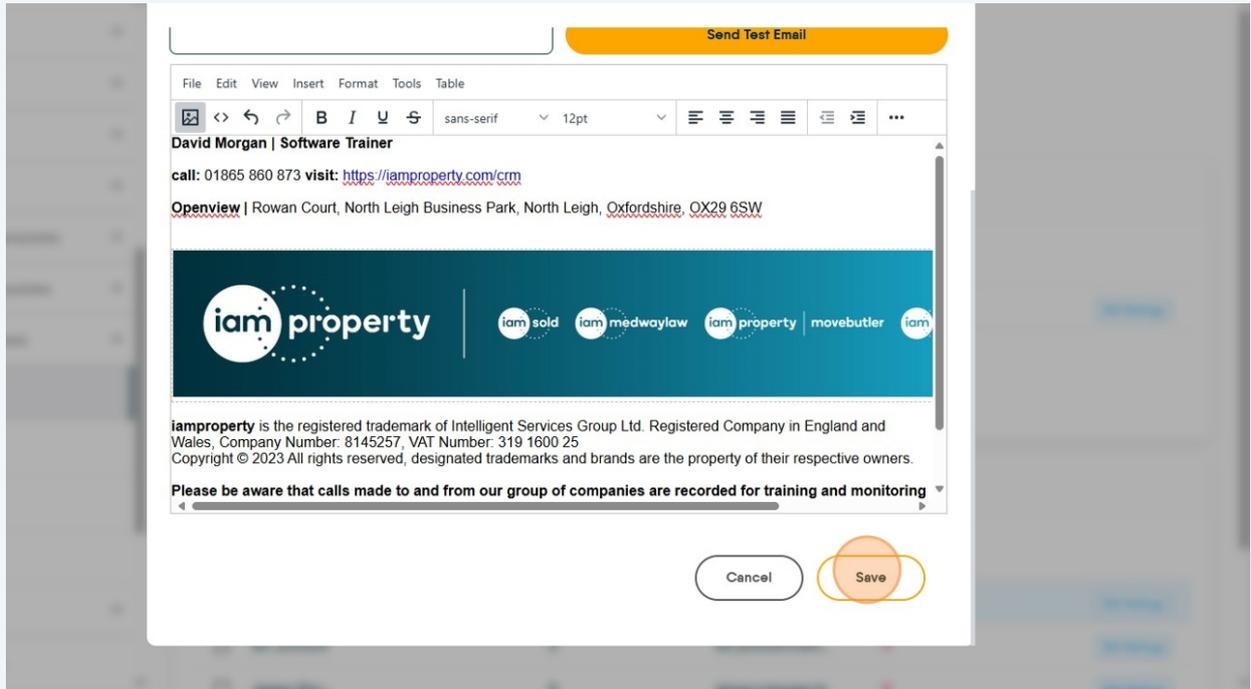
10 Click this image.



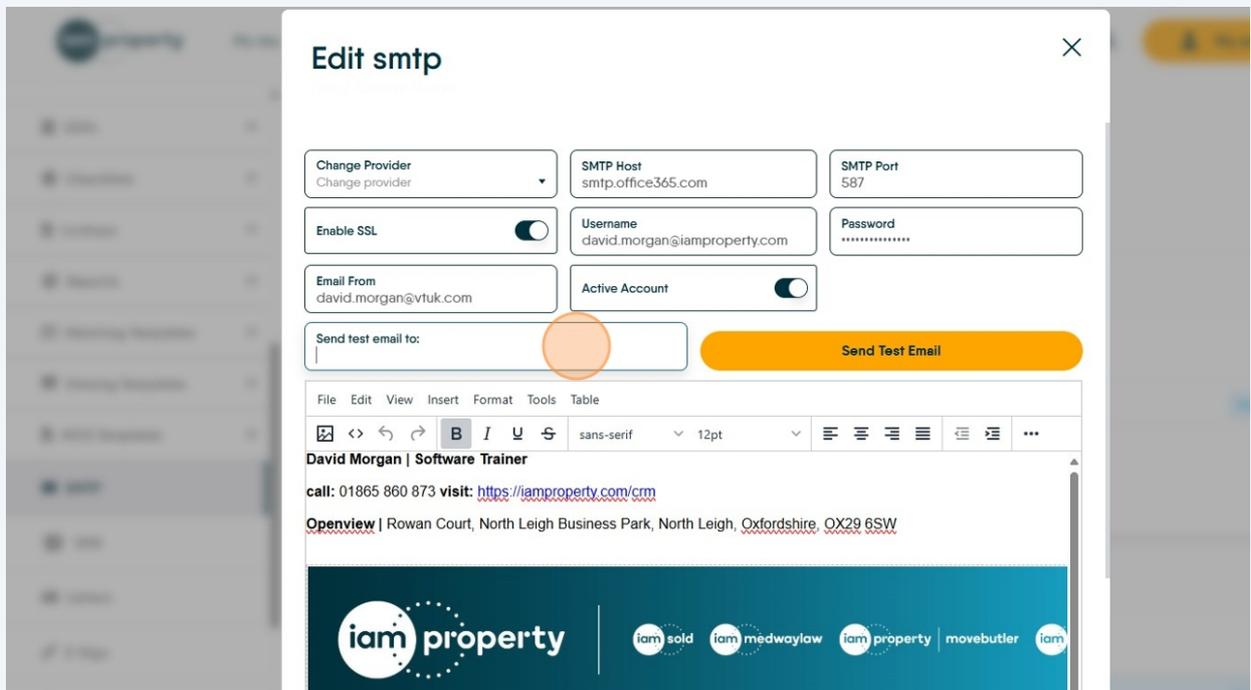
11 Click here. Use the tabs to resize the image.



12 Click "Save"



13 Click the "Send test email to:" field.



14 Click "Send Test Email"

**Edit smtp**

Change Provider: Change provider

SMTP Host: smtp.office365.com

SMTP Port: 587

Enable SSL:

Username: david.morgan@iamproperty.com

Password: .....

Email From: david.morgan@vtuk.com

Active Account:

Send test email to: david.morgan@iamproperty.com

File Edit View Insert Format Tools Table

Rich text editor toolbar: **B** *I* U ...

David Morgan | Software Trainer

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