

Updating your Email Password in iamproperty CRM



This guide provides a straightforward process for updating your email password in iamproperty CRM, ensuring your account remains secure. Following these steps will enhance your CRM experience by maintaining proper email functionality. It's essential for users to keep their credentials updated to prevent access issues, making this guide a valuable resource for effective account management.

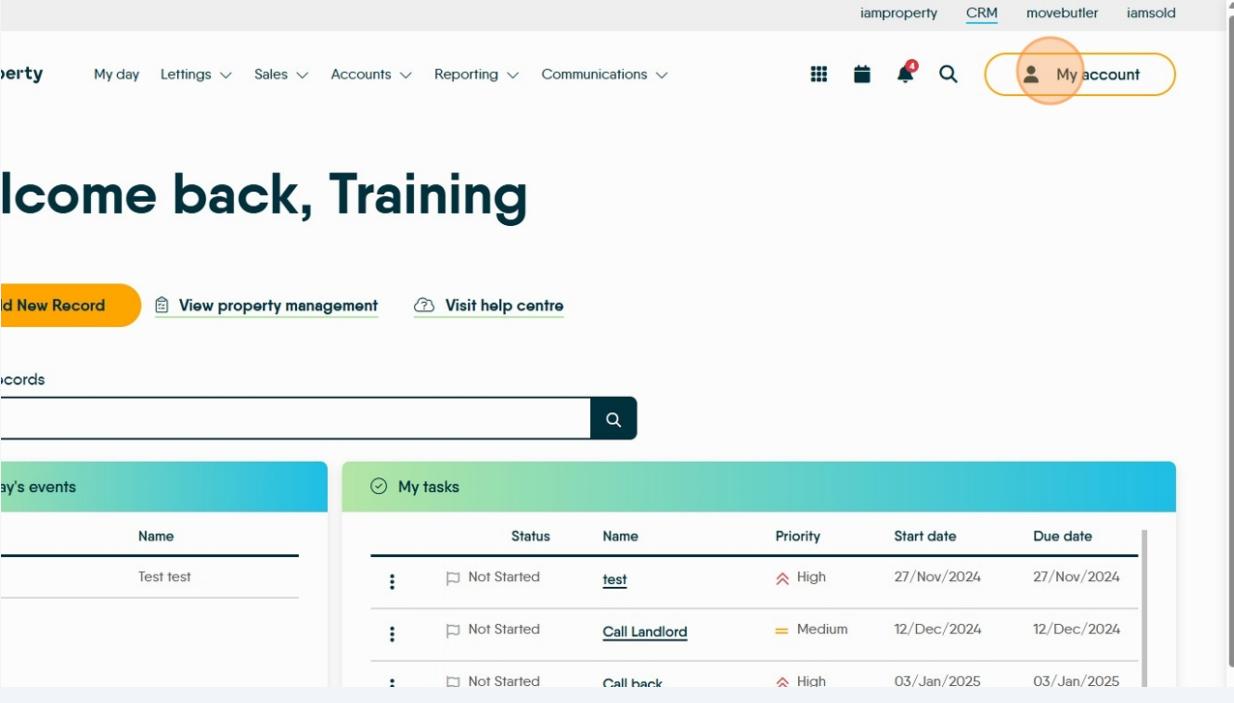
- 1 Navigate to <https://crm.iamproperty.com/MyDay>

A screenshot of the iamproperty CRM 'My Day' dashboard. The top navigation bar includes links for 'My day', 'Lettings', 'Sales', 'Accounts', 'Reporting', 'Communications', and 'My account'. Below the navigation is a search bar with the placeholder 'Search all records' and a magnifying glass icon. On the left, a yellow button says '+ Add New Record'. To the right, there are two main sections: 'Today's events' (listing a single event at 12:00) and 'My tasks' (listing four tasks: 'test', 'Call Landlord', 'Call back', and 'Make Tea').

Time	Name
12:00	Test test

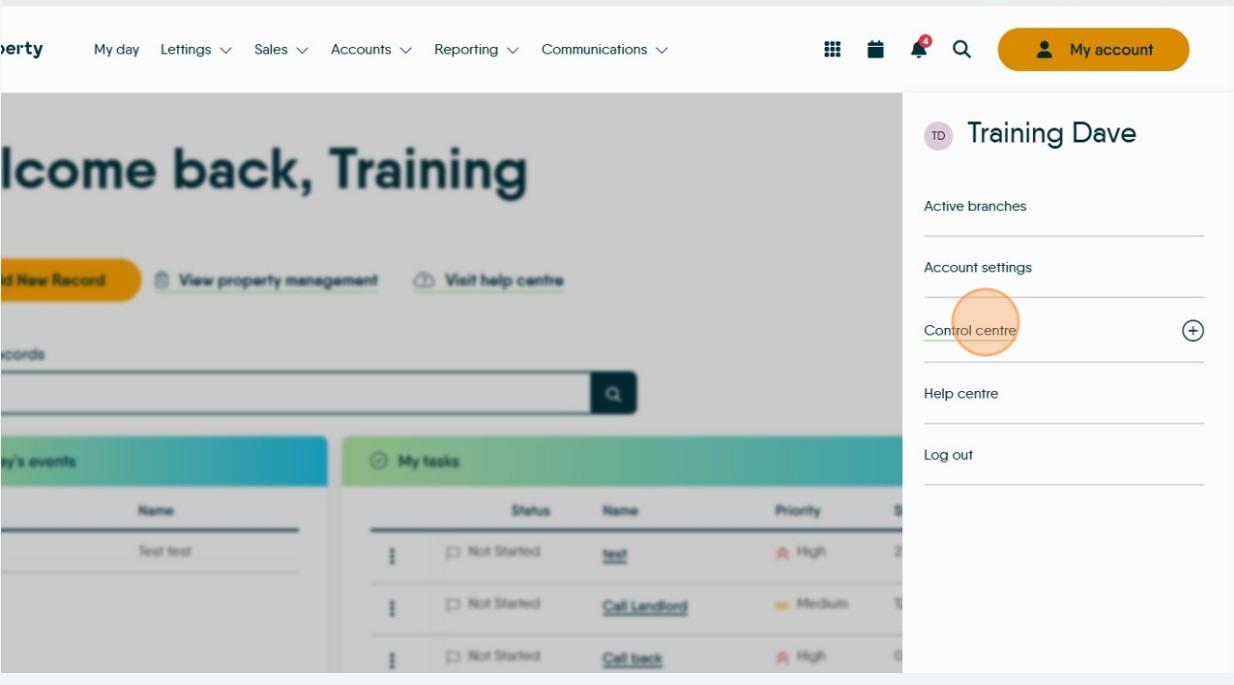
	Status	Name	Priority	Start date	Due date
⋮	Not Started	test	High	27/Nov/2024	27/Nov/2024
⋮	Not Started	Call Landlord	Medium	12/Dec/2024	12/Dec/2024
⋮	Not Started	Call back	High	03/Jan/2025	03/Jan/2025
⋮	Not Started	Make Tea	High	07/Jan/2025	07/Jan/2025

2 Click "My account"



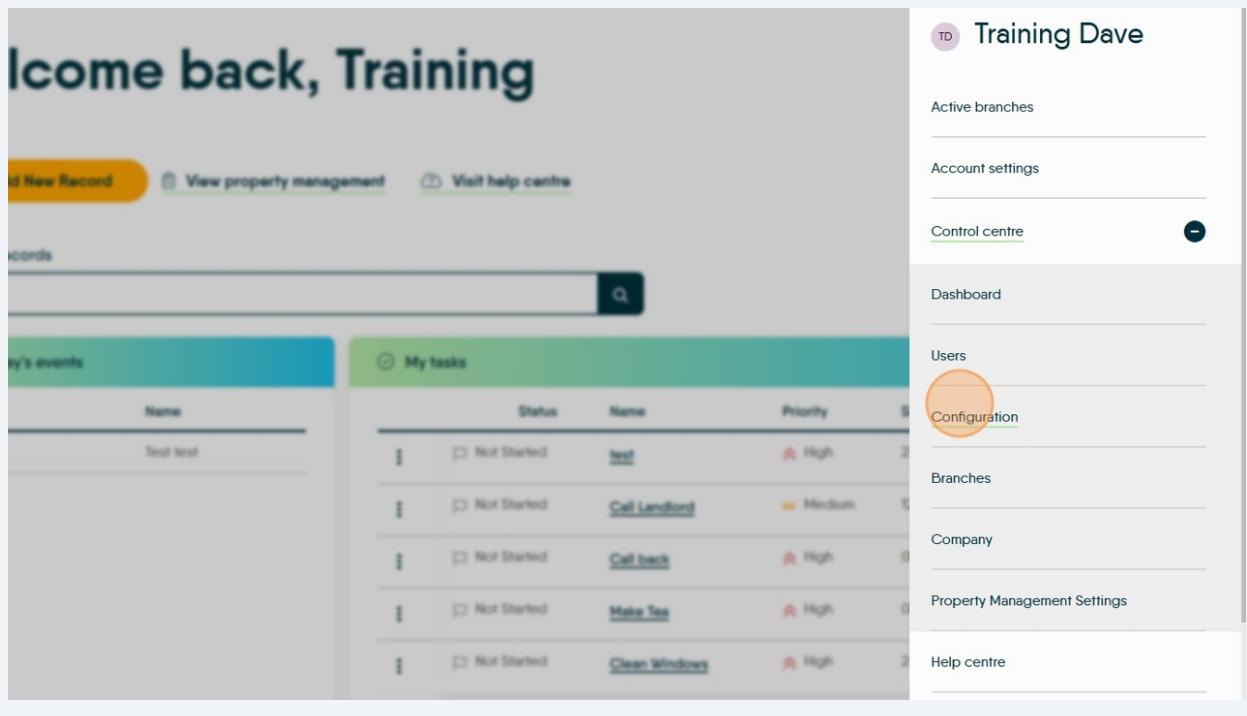
The screenshot shows the software's main navigation bar with links for 'My day', 'Lettings', 'Sales', 'Accounts', 'Reporting', and 'Communications'. Below the navigation is a toolbar with icons for 'New Record', 'View property management', and 'Visit help centre'. The main content area features a title 'Income back, Training' and two sections: 'My events' (listing 'Test test') and 'My tasks' (listing three tasks: 'test' (High priority, due 27/Nov/2024), 'Call Landlord' (Medium priority, due 12/Dec/2024), and 'Call back' (High priority, due 03/Jan/2025)). The 'My account' button in the top right corner is highlighted with a red circle.

3 Click "Control centre"



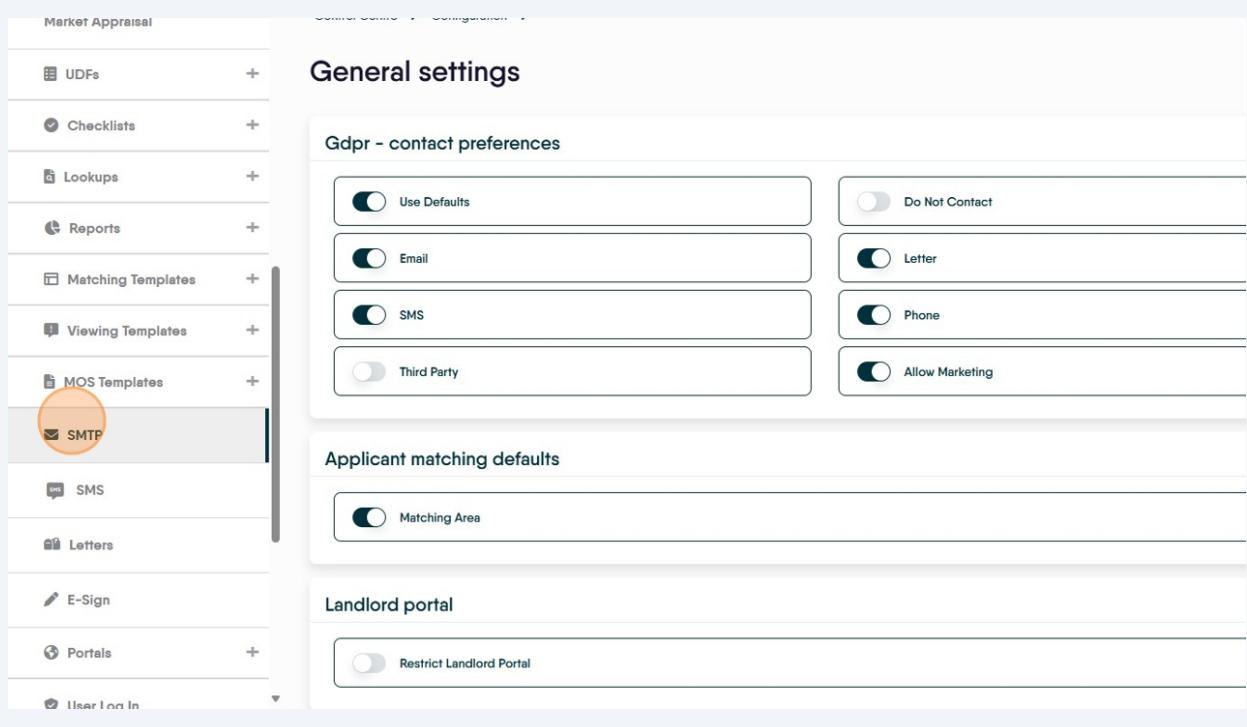
The screenshot shows the same software interface as the previous step, but the 'Control centre' button in the top right corner is highlighted with a red circle. The rest of the interface, including the navigation bar, toolbar, and main content sections, remains the same.

4 Click "Configuration"



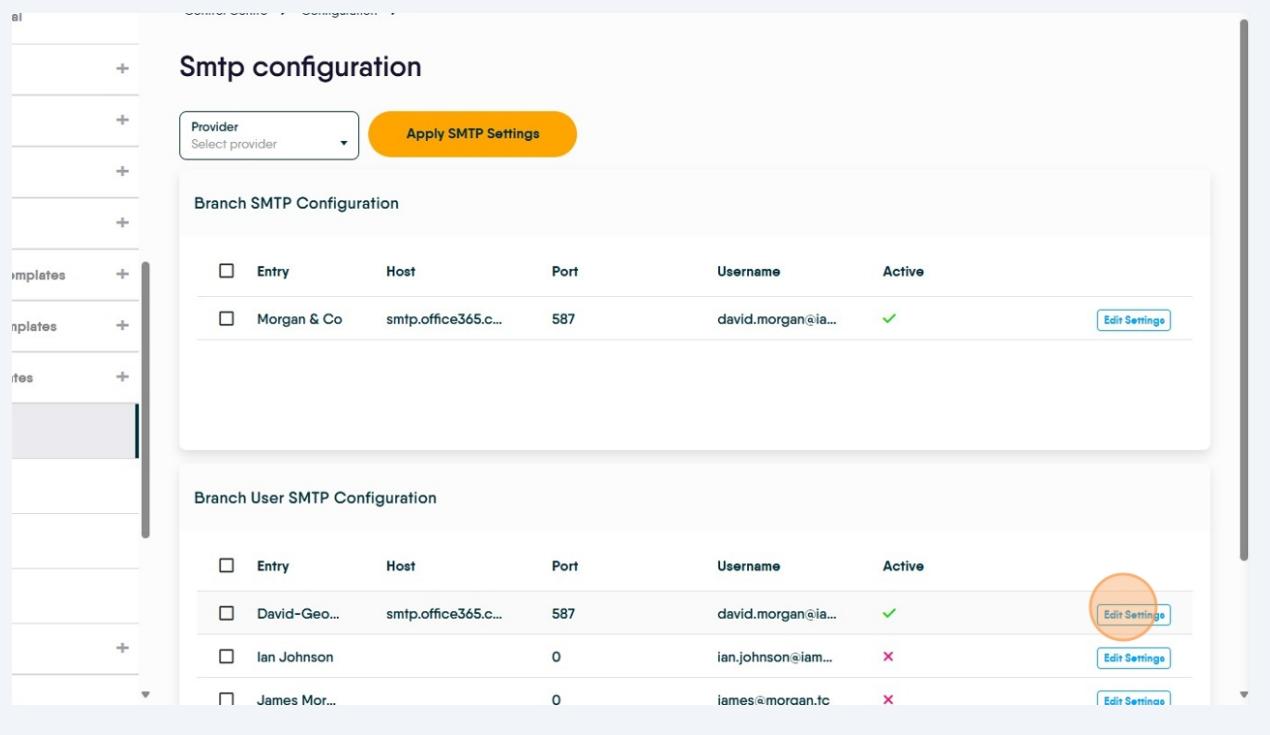
The screenshot shows a software interface with a top navigation bar and a sidebar on the right. The top bar includes 'New Record', 'View property management', and 'Visit help centre'. The sidebar, titled 'Training Dave', contains sections for 'Active branches', 'Account settings', 'Control centre' (which is underlined and has a minus sign), 'Dashboard', 'Users' (with 'Configuration' highlighted by an orange circle), 'Branches', 'Company', 'Property Management Settings', and 'Help centre'. The main area displays a 'My tasks' list with several items: 'Test test' (Status: Not Started, Priority: High), 'Call Landlord' (Status: Not Started, Priority: Medium), 'Call back' (Status: Not Started, Priority: High), 'Make Tee' (Status: Not Started, Priority: High), and 'Clean Windows' (Status: Not Started, Priority: High).

5 Scroll down and click "SMTP"



The screenshot shows the 'General settings' page. On the left, a sidebar lists various configuration options: 'Market Appraisal', 'UDFs', 'Checklists', 'Lookups', 'Reports', 'Matching Templates', 'Viewing Templates', 'MOS Templates', 'SMTP' (highlighted with an orange circle), 'SMS', 'Letters', 'E-Sign', 'Portals', and 'User Log In'. The main content area is titled 'General settings' and contains the following sections: 'Gdpr - contact preferences' (with options for 'Use Defaults', 'Email', 'SMS', 'Third Party', 'Do Not Contact', 'Letter', 'Phone', and 'Allow Marketing'), 'Applicant matching defaults' (with a 'Matching Area' toggle), and 'Landlord portal' (with a 'Restrict Landlord Portal' toggle).

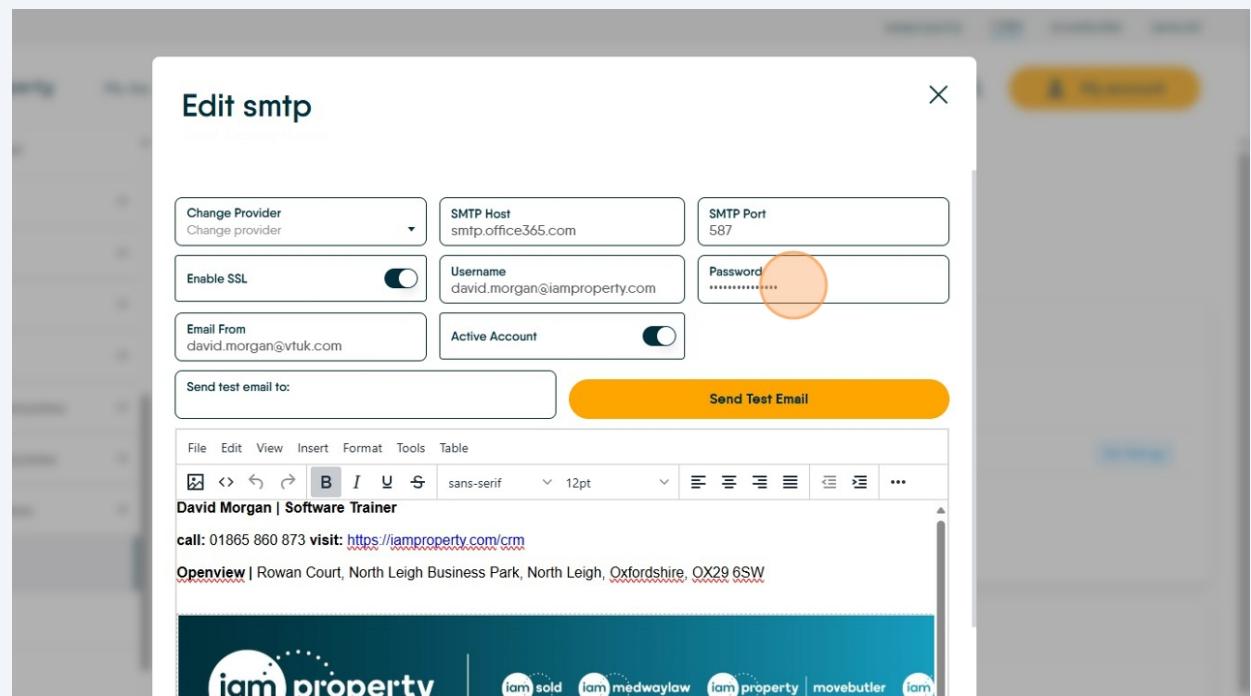
6 Find YOUR email details and click "Edit Settings" option next to your entry.



The screenshot shows the 'Smtp configuration' page with the following sections:

- Branch SMTP Configuration:** A table with columns: Entry, Host, Port, Username, Active. One entry is listed: Morgan & Co (Host: smtp.office365.com, Port: 587, Username: david.morgan@ia..., Active: checked, Edit Settings button).
- Branch User SMTP Configuration:** A table with columns: Entry, Host, Port, Username, Active. Four entries are listed: David-Geo... (Host: smtp.office365.com, Port: 587, Username: david.morgan@ia..., Active: checked, Edit Settings button), Ian Johnson (Host: 0, Port: 0, Username: ian.johnson@iam..., Active: checked, Edit Settings button), James Mor... (Host: 0, Port: 0, Username: iames@morgan.tc, Active: checked, Edit Settings button), and another entry with Host 0, Port 0, and Username iames@morgan.tc.

7 Click the "Password" field and add/update your password.



The screenshot shows the 'Edit smtp' dialog box with the following fields:

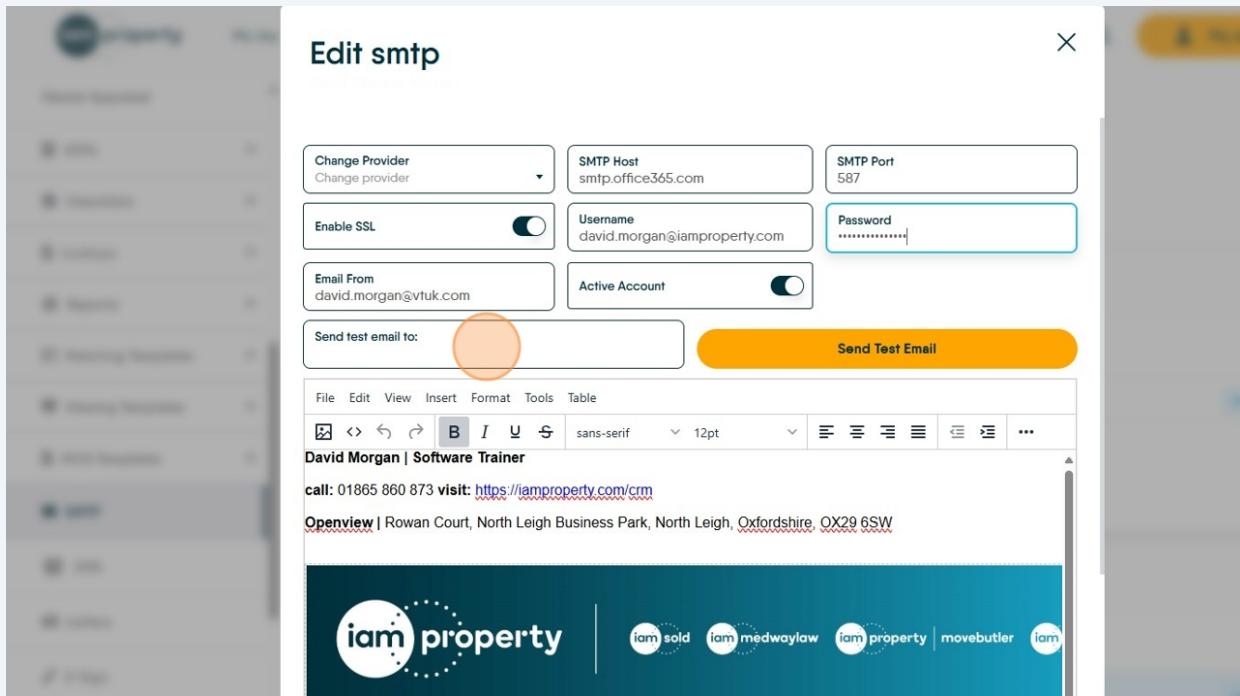
- Change Provider: Change provider (dropdown)
- SMTP Host: smtp.office365.com
- SMTP Port: 587
- Enable SSL: On (toggle switch)
- Username: david.morgan@iamproperty.com
- Password: (field containing '*****', highlighted with an orange circle)
- Email From: david.morgan@vtuk.com
- Active Account: On (toggle switch)
- Send test email to: (input field)
- Send Test Email: (button)

Below the dialog, a rich text editor shows the following content:

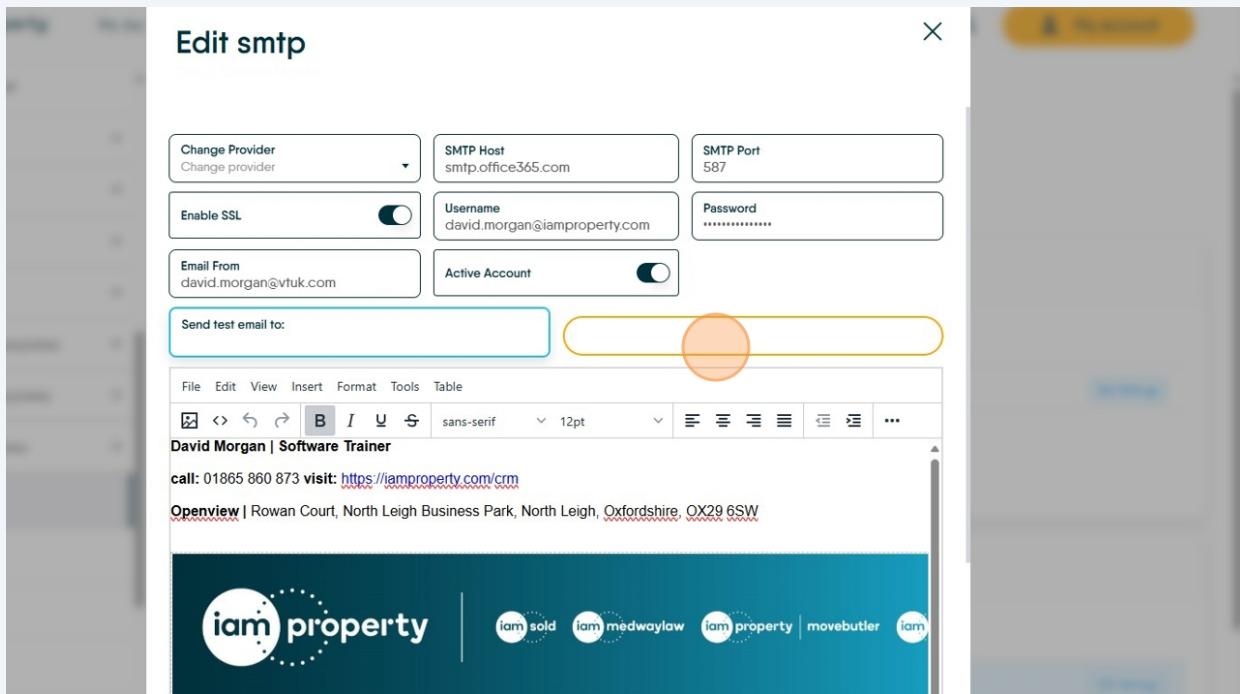
David Morgan | Software Trainer
call: 01865 860 873 visit: <https://iamproperty.com/crm>
Openview | Rowan Court, North Leigh Business Park, North Leigh, Oxfordshire, OX29 6SW

At the bottom, there is a footer with the 'iam property' logo and links to 'iam sold', 'iam medwaylaw', 'iam property', 'movebutler', and 'iam'.

8 The check this is working. Click the "Send test email to:" field.



9 Click "Send Test Email"



10

If all works as expected, that is done, if not check the password is entered correctly. If email still does not work check the other settings shown on screen with your IT provider as we do not necessarily know your setup.

Still not working, contact CRM support