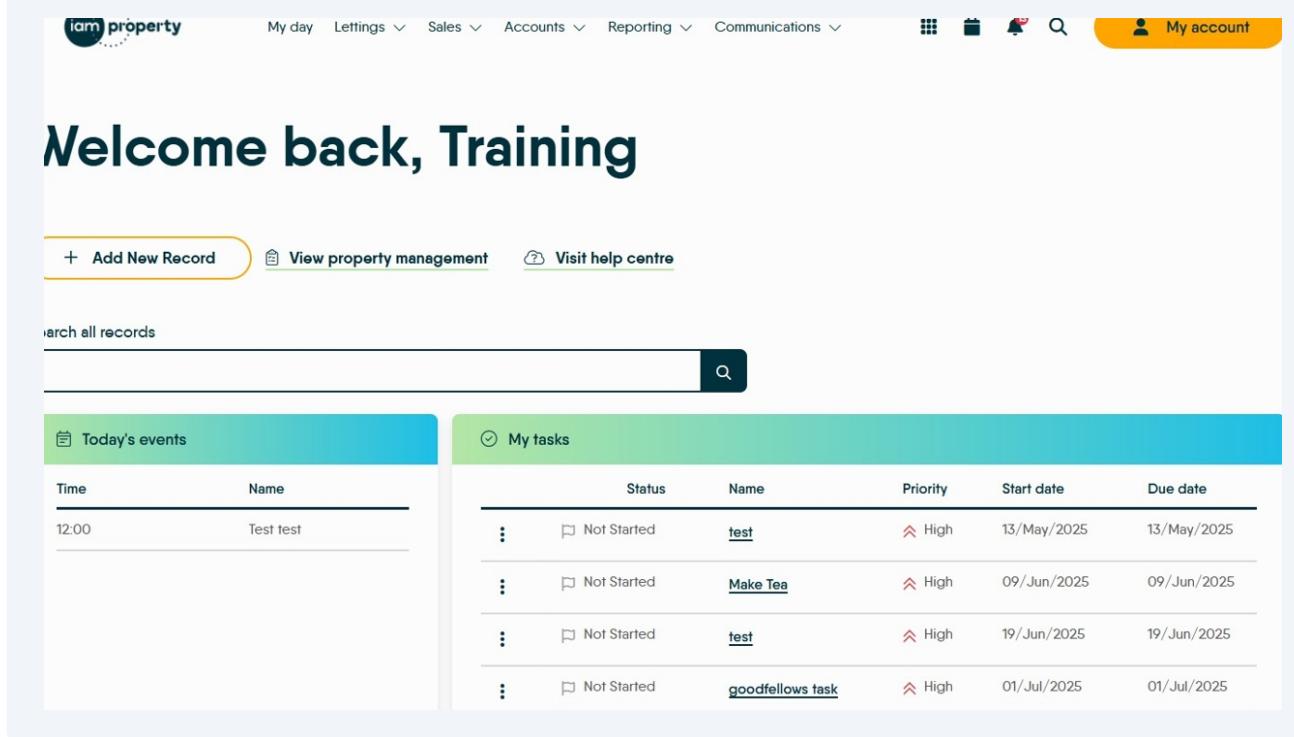


Navigating to the My Day Screen



This guide offers a step-by-step approach to effectively navigate the My Day screen on the iamproperty CRM platform.

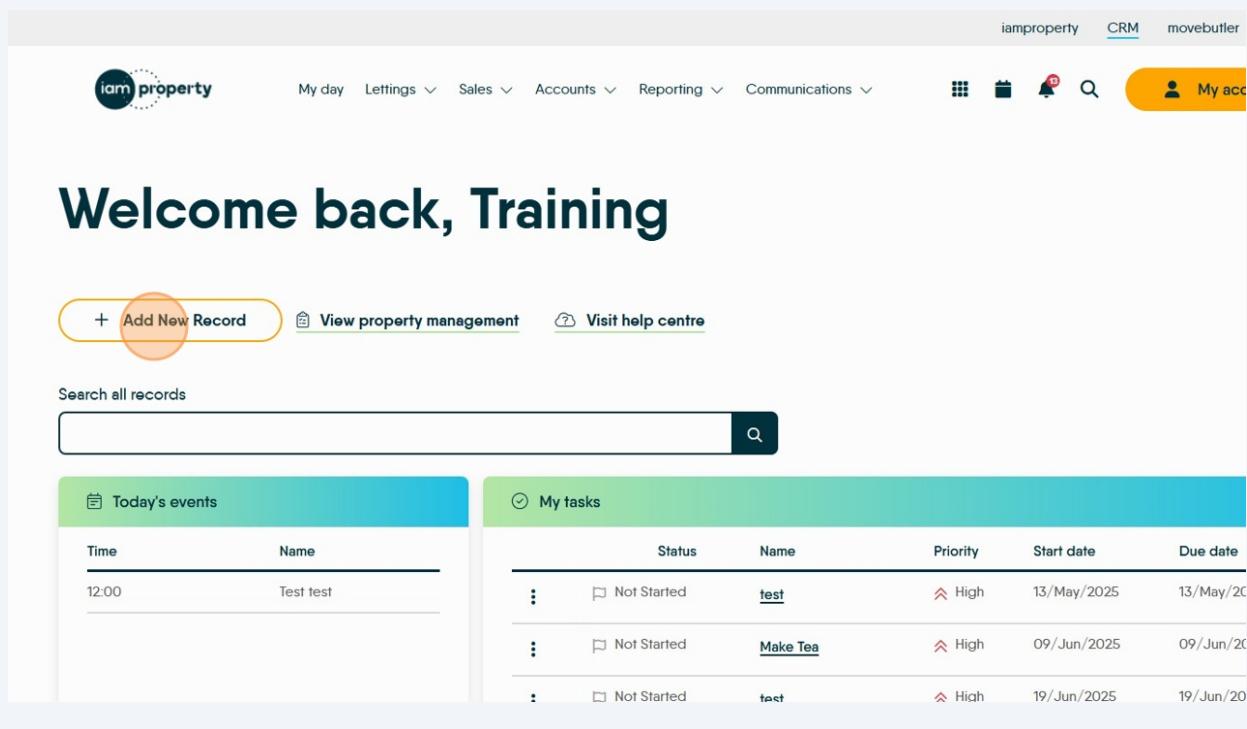
- 1 Navigate to <https://crm.iamproperty.com/MyDay>



The screenshot shows the 'My Day' screen of the iam property CRM. At the top, there is a navigation bar with links for 'My day', 'Lettings', 'Sales', 'Accounts', 'Reporting', and 'Communications'. To the right of these are icons for a grid view, a calendar, a bell, a search bar, and a 'My account' button. Below the navigation bar, a large 'Welcome back, Training' message is displayed. Underneath this, there are two main sections: 'Today's events' and 'My tasks'. The 'Today's events' section shows a single entry: '12:00 Test test'. The 'My tasks' section shows four tasks: 'test' (Status: Not Started, Priority: High, Due date: 13/May/2025), 'Make Tea' (Status: Not Started, Priority: High, Due date: 09/Jun/2025), 'test' (Status: Not Started, Priority: High, Due date: 19/Jun/2025), and 'goodfellows task' (Status: Not Started, Priority: High, Due date: 01/Jul/2025). A search bar is located at the top of the main content area.

Time	Name	Status	Name	Priority	Start date	Due date
12:00	Test test	Not Started	test	High	13/May/2025	13/May/2025
		Not Started	Make Tea	High	09/Jun/2025	09/Jun/2025
		Not Started	test	High	19/Jun/2025	19/Jun/2025
		Not Started	goodfellows task	High	01/Jul/2025	01/Jul/2025

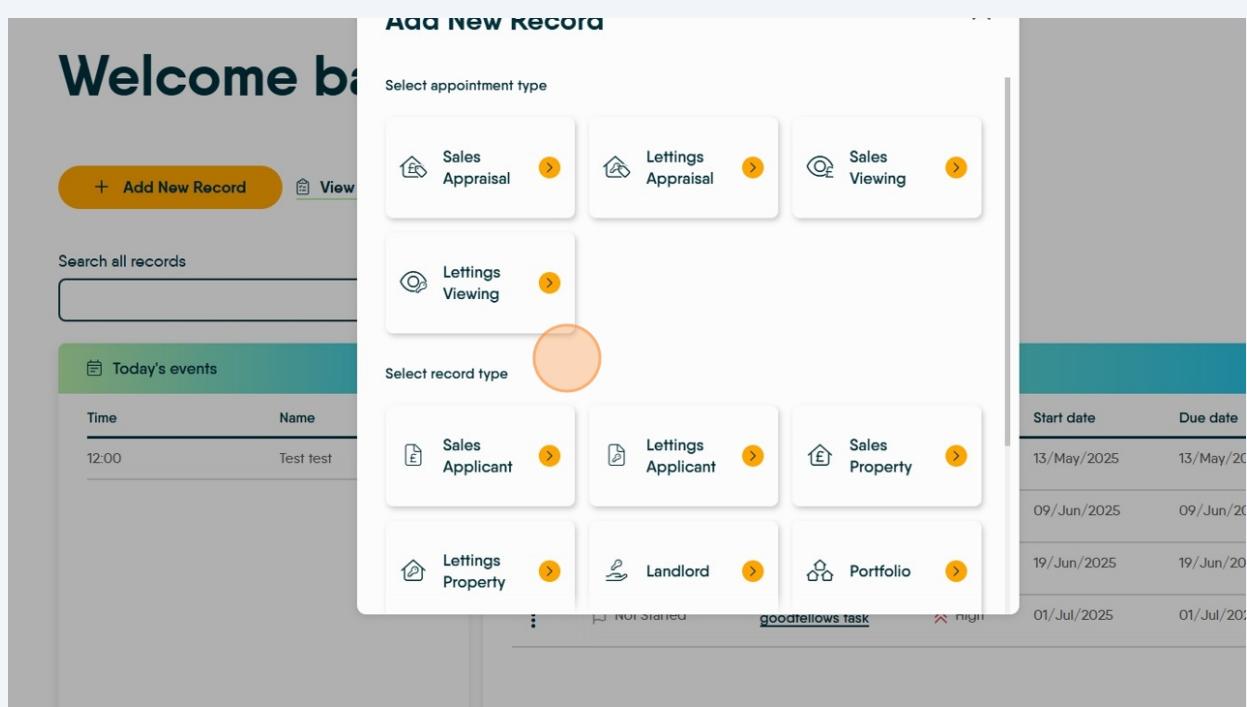
2 To add a new record in CRM. Click "Add New Record"



The screenshot shows the CRM dashboard with the following elements:

- Header:** iamproperty, CRM, movebutler, My day, Lettings, Sales, Accounts, Reporting, Communications.
- Welcome Message:** Welcome back, Training.
- Buttons:** Add New Record (highlighted with a red circle), View property management, Visit help centre.
- Search Bar:** Search all records.
- Today's events:** A table showing an event at 12:00 named "Test test".
- My tasks:** A table showing three tasks: "test" (Not Started, High priority, 13/May/2025), "Make Tea" (Not Started, High priority, 09/Jun/2025), and another "test" (Not Started, High priority, 19/Jun/2025).

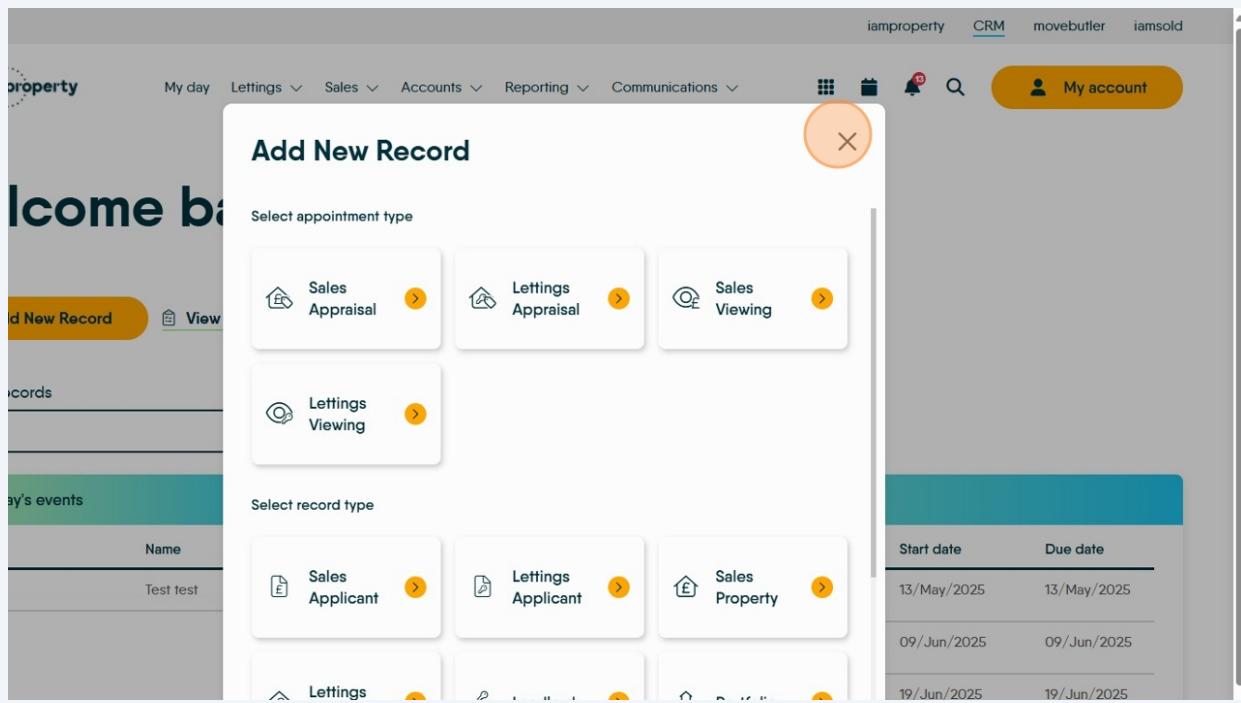
3 Click "Select record type"



The screenshot shows the "Add New Record" modal with the following elements:

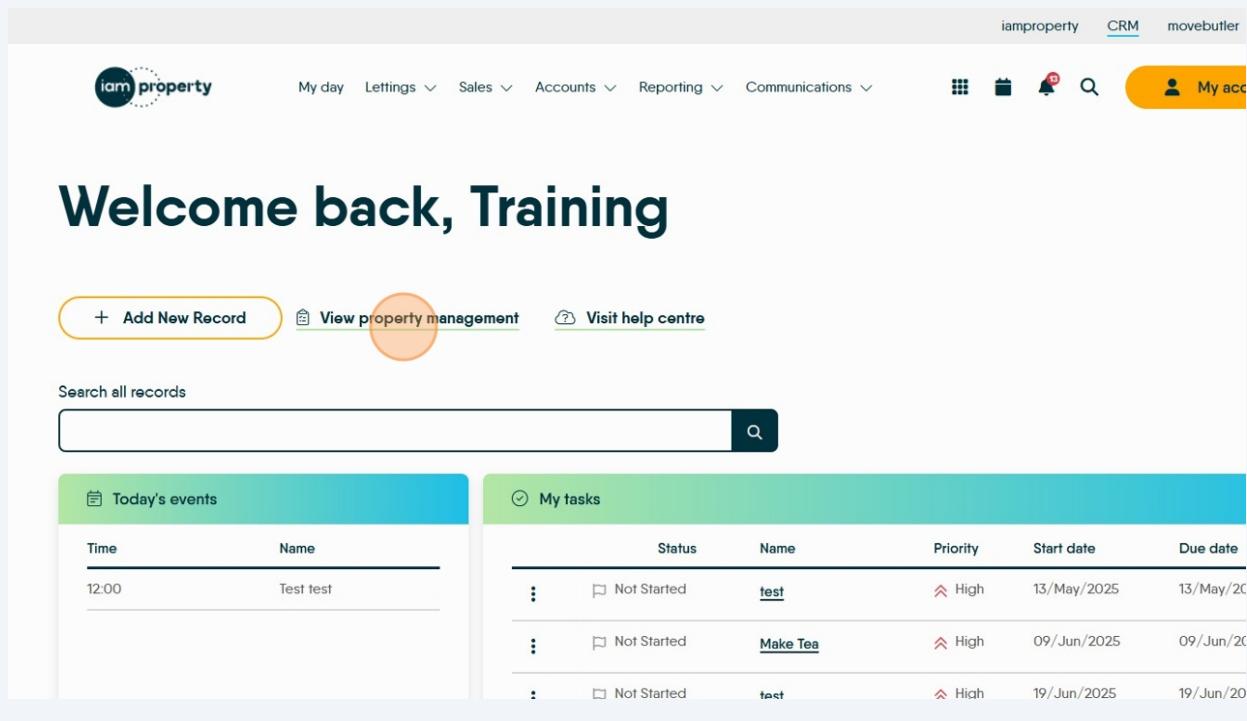
- Header:** Add New Record.
- Section:** Select appointment type (Sales Appraisal, Lettings Appraisal, Sales Viewing).
- Section:** Select record type (Sales Applicant, Lettings Applicant, Sales Property, Lettings Property, Landlord, Portfolio).
- Background:** Shows the CRM dashboard with the "Welcome back, Training" message and the "Add New Record" button highlighted.

4 Click "Close"

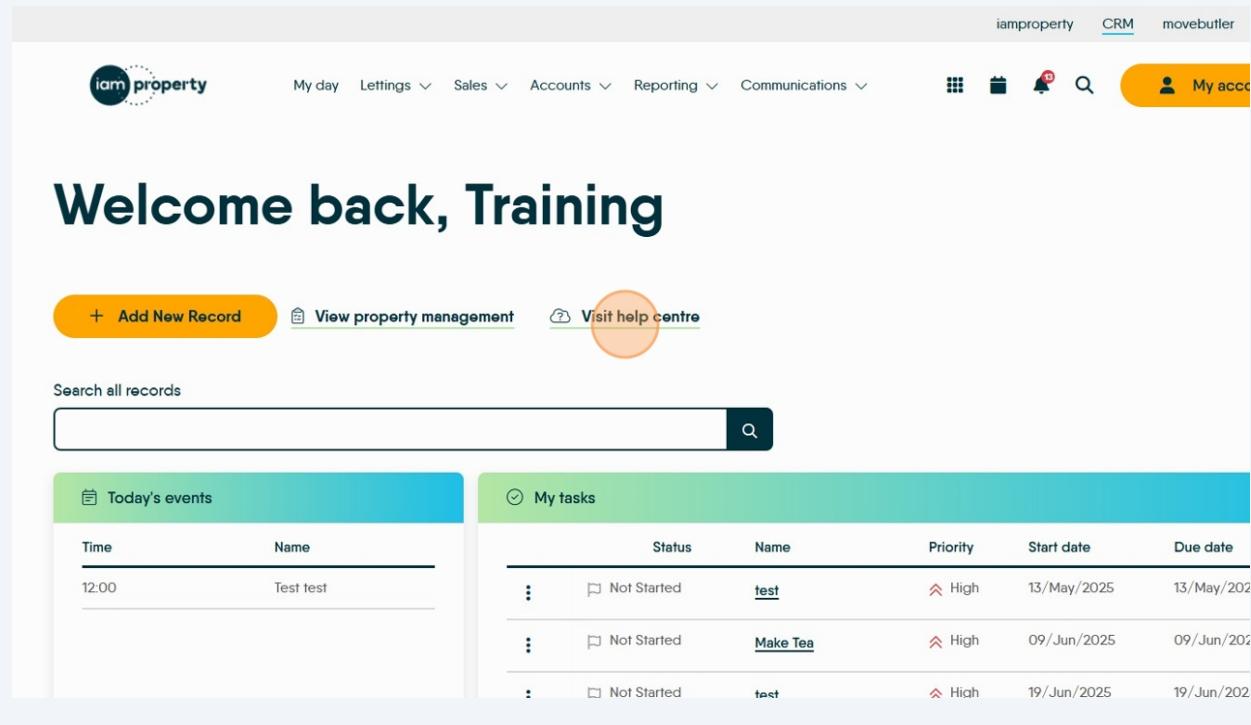


5 By clicking "View property management" you can access the Property Management module and manage your property maintenance tasks

n.b. this will not show if Property Maintenance is not enabled on your account.



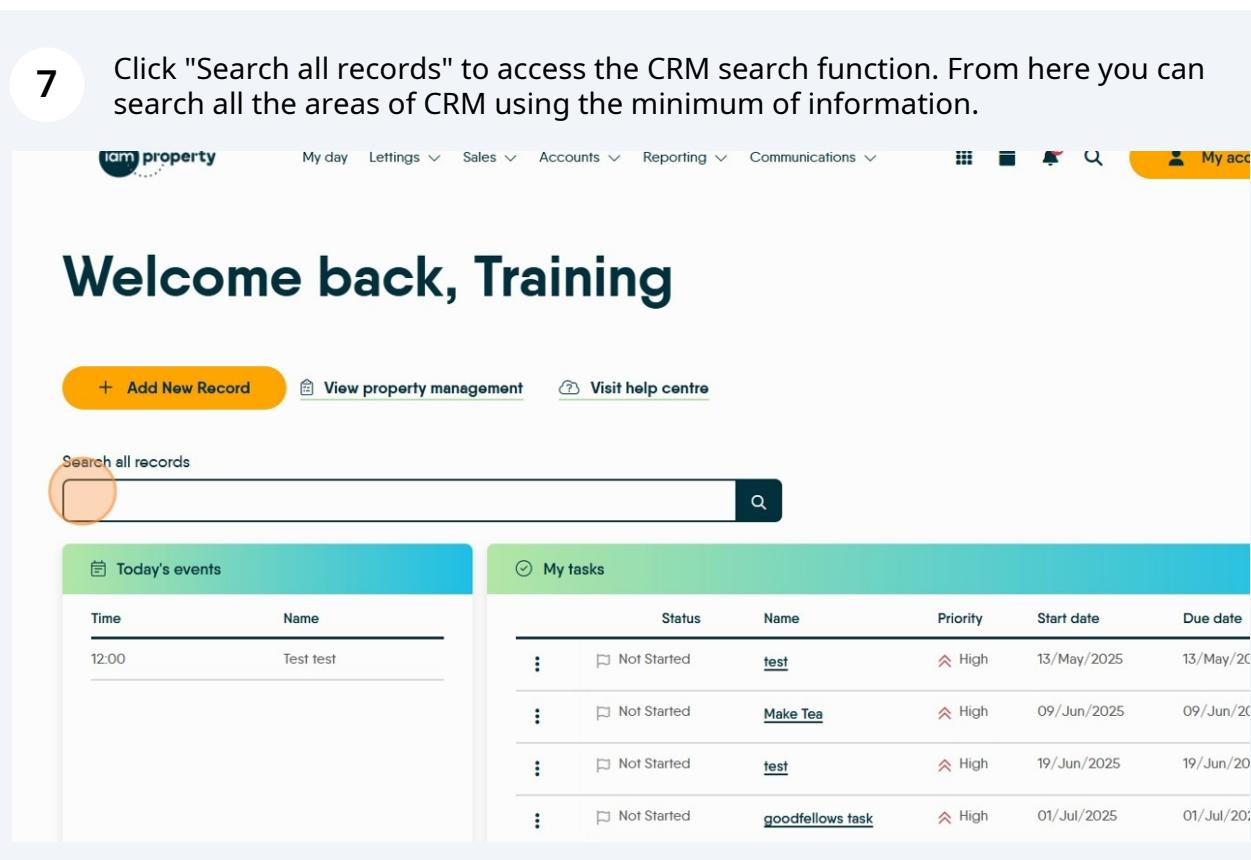
6 Clicking "Visit help centre" will take you to the CRM Help Centre where you will have access to the CRM support documentation and the Support team.



The screenshot shows the CRM interface with the following elements:

- Header:** iamproperty, CRM, movebutler, My day, Lettings, Sales, Accounts, Reporting, Communications.
- Top Buttons:** + Add New Record, View property management, Visit help centre (highlighted with a red circle).
- Search Bar:** Search all records with a magnifying glass icon.
- Today's events:** A table with columns Time and Name, showing 12:00 and Test test.
- My tasks:** A table with columns Status, Name, Priority, Start date, and Due date, showing three tasks: test (Not Started, High, 13/May/2025, 13/May/2025), Make Tea (Not Started, High, 09/Jun/2025, 09/Jun/2025), and another test (Not Started, High, 19/Jun/2025, 19/Jun/2025).

7 Click "Search all records" to access the CRM search function. From here you can search all the areas of CRM using the minimum of information.



The screenshot shows the CRM interface with the following elements:

- Header:** iamproperty, My day, Lettings, Sales, Accounts, Reporting, Communications.
- Top Buttons:** + Add New Record, View property management, Visit help centre.
- Search Bar:** Search all records with a magnifying glass icon (highlighted with a red circle).
- Today's events:** A table with columns Time and Name, showing 12:00 and Test test.
- My tasks:** A table with columns Status, Name, Priority, Start date, and Due date, showing four tasks: test (Not Started, High, 13/May/2025, 13/May/2025), Make Tea (Not Started, High, 09/Jun/2025, 09/Jun/2025), test (Not Started, High, 19/Jun/2025, 19/Jun/2025), and goodfellows task (Not Started, High, 01/Jul/2025, 01/Jul/2025).

8

"Today's events" is a list of all the CRM calendar events you have for the day. You can also easily access the Calendar from here.

Today's events	
Time	Name
12:00	Test test

 [View calendar](#)

My tasks	
Status	Name
Not Started	<u>test</u>
Not Started	<u>Make Tea</u>
Not Started	<u>test</u>
Not Started	<u>goodfellows task</u>

 [View all tasks](#)

9

"My tasks" will show you all your currently due and overdue tasks. Click "View all tasks" to see current, overdue and future dated tasks.

Tasks are flexible 'to do' items that can be created for your self or colleagues and linked to client records in the CRM for reporting purposes.

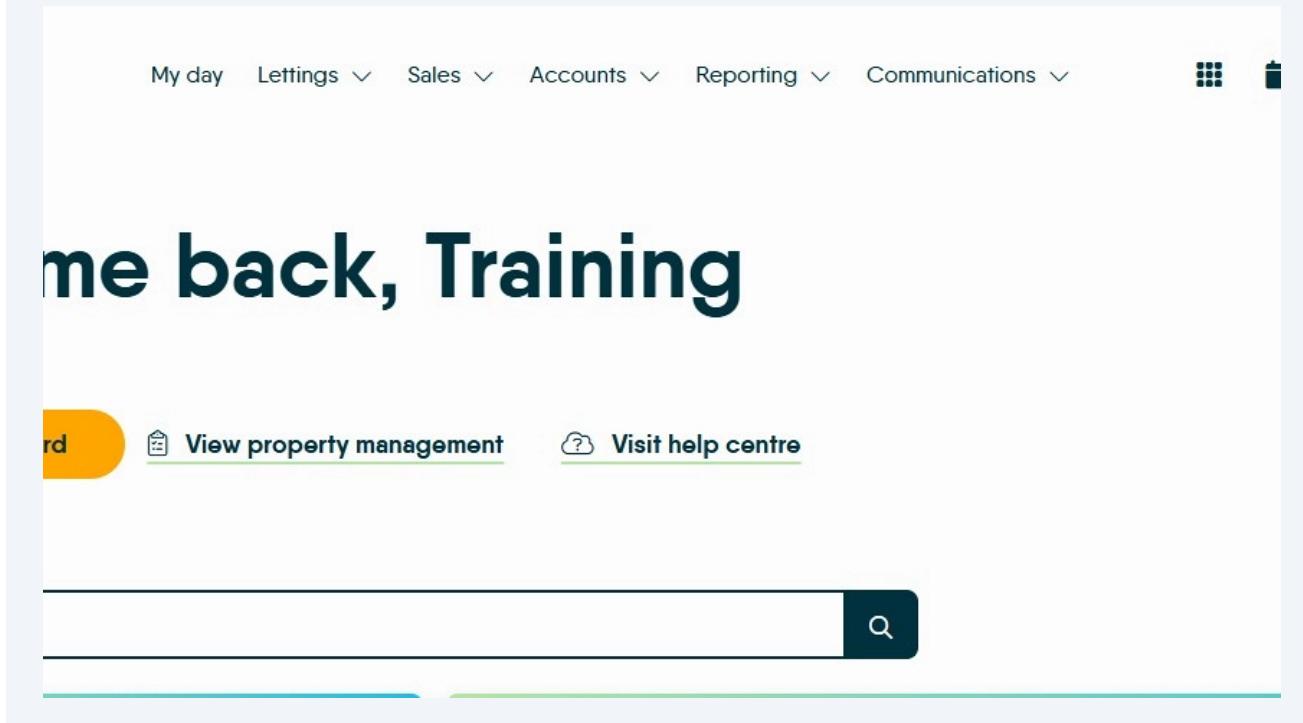
My tasks					
	Status	Name	Priority	Start date	Due date
⋮	Not Started	<u>test</u>	High	13/May/2025	13/May/2025
⋮	Not Started	<u>Make Tea</u>	High	09/Jun/2025	09/Jun/2025
⋮	Not Started	<u>test</u>	High	19/Jun/2025	19/Jun/2025
⋮	Not Started	<u>goodfellows task</u>	High	01/Jul/2025	01/Jul/2025

 [View all tasks](#)

10

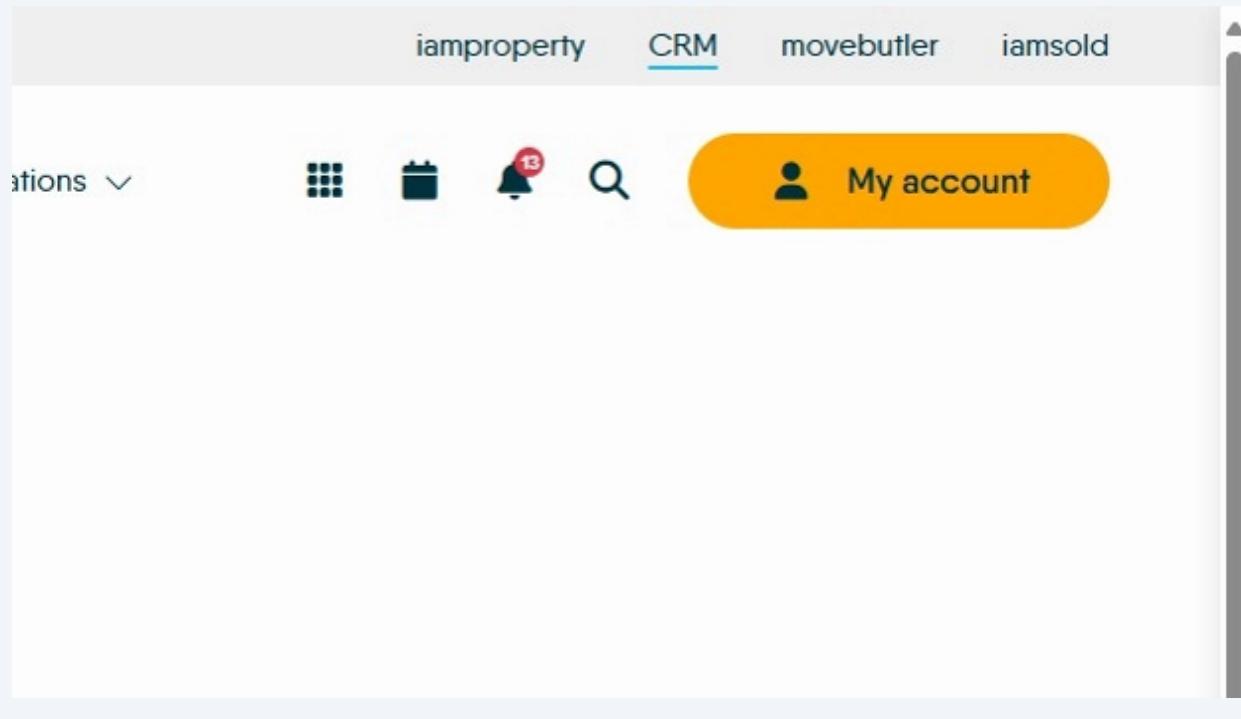
At the top of the My Day screen you will see all the menu tabs to access the modules you have enabled in CRM. These menu options are always available, regardless of where you are in CRM. Click 'My Day' to come back to this screen if you have moved away.

You may see the same as shown or fewer icons depending on your personal setup.



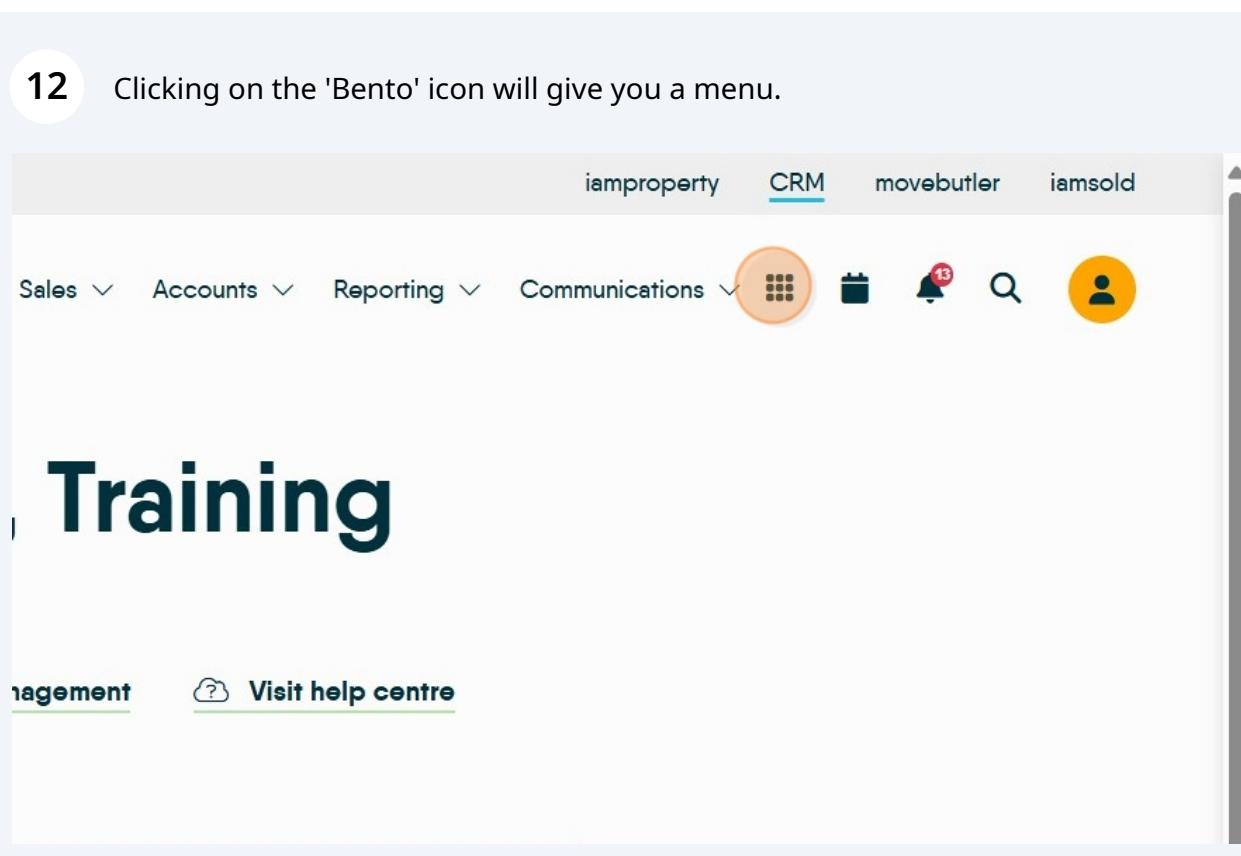
11

To the right side of the screen you have the 'Bento' menu, Calendar, Notifications and search icons plus 'My Account'



12

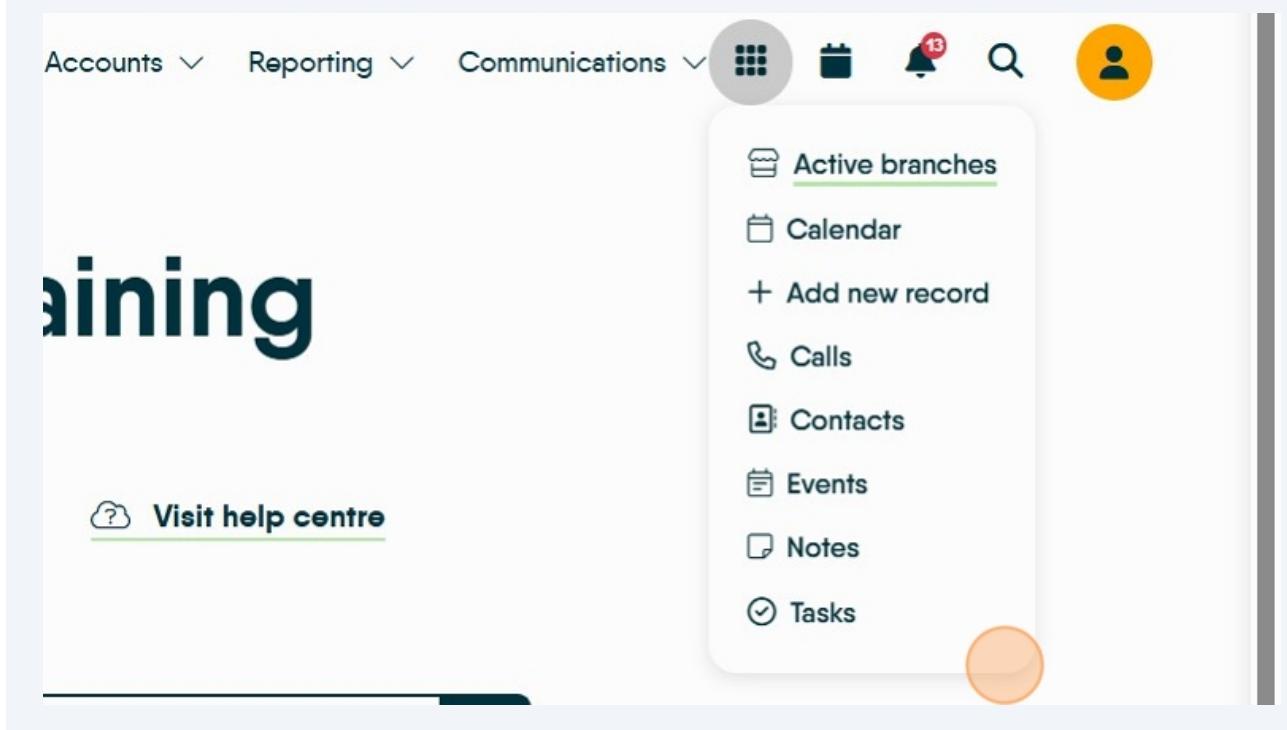
Clicking on the 'Bento' icon will give you a menu.



Training

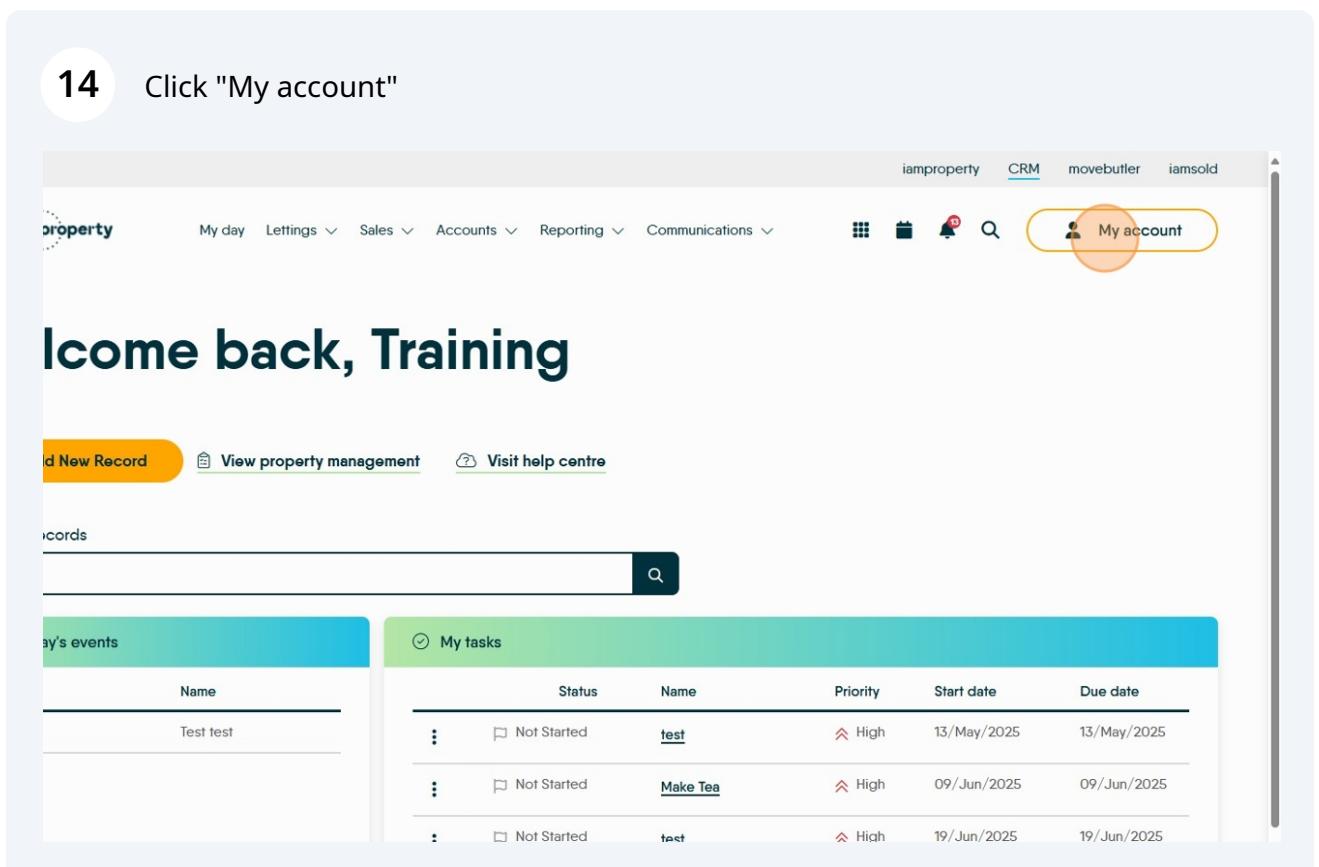
13

This menu gives you quick access to various features from anywhere in the CRM. From here, calls can be logged, tasks created etc.



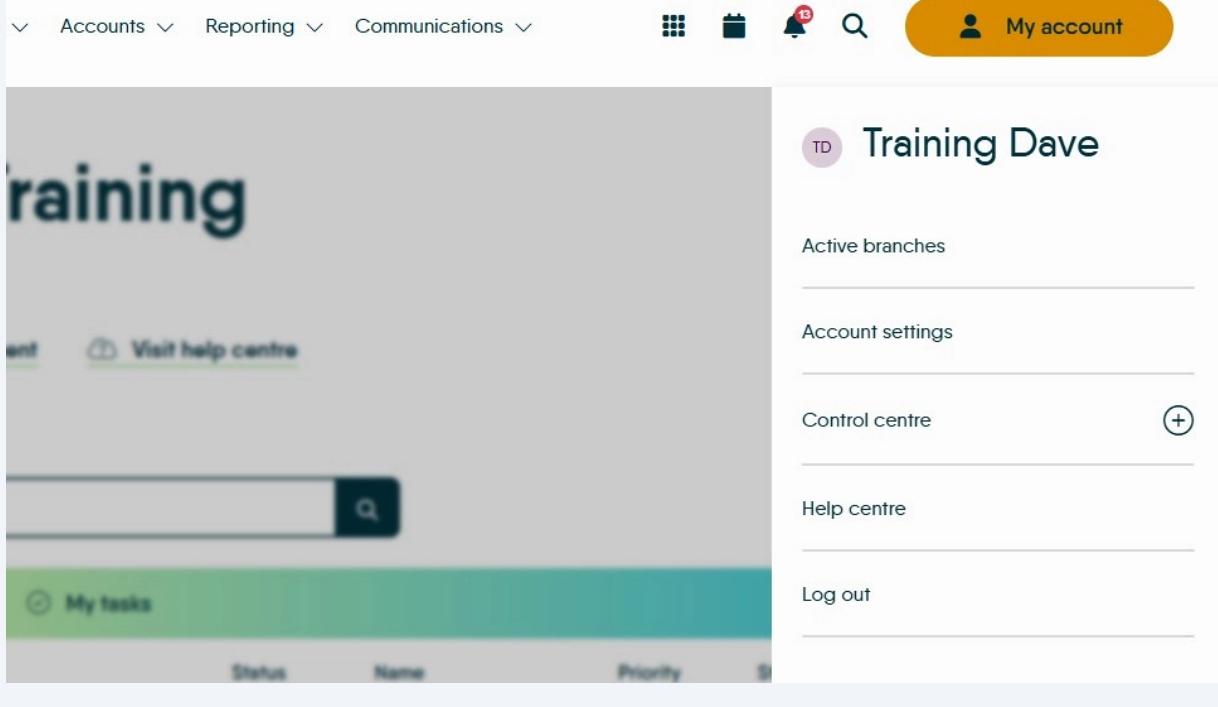
14

Click "My account"



15

A menu will display. Branches, allows visibility of the currently active branches. Account settings will allow the user to edit their own name and contact detail for use in CRM. Control Centre will, if enabled show the user the 'Control Centre' and Configuration functions.



The screenshot shows a CRM application interface. At the top, there is a navigation bar with 'Accounts', 'Reporting', and 'Communications' dropdowns, followed by icons for grid, calendar, notifications (with 13 notifications), search, and 'My account'. The main area has a large 'Training' logo and a 'Visit help centre' button. Below is a search bar and a 'My tasks' section with columns for 'Status', 'Name', and 'Priority'. On the right, a sidebar for 'Training Dave' includes 'Active branches', 'Account settings', 'Control centre' (with a plus sign), 'Help centre', and 'Log out'.