

# 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.

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

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	<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

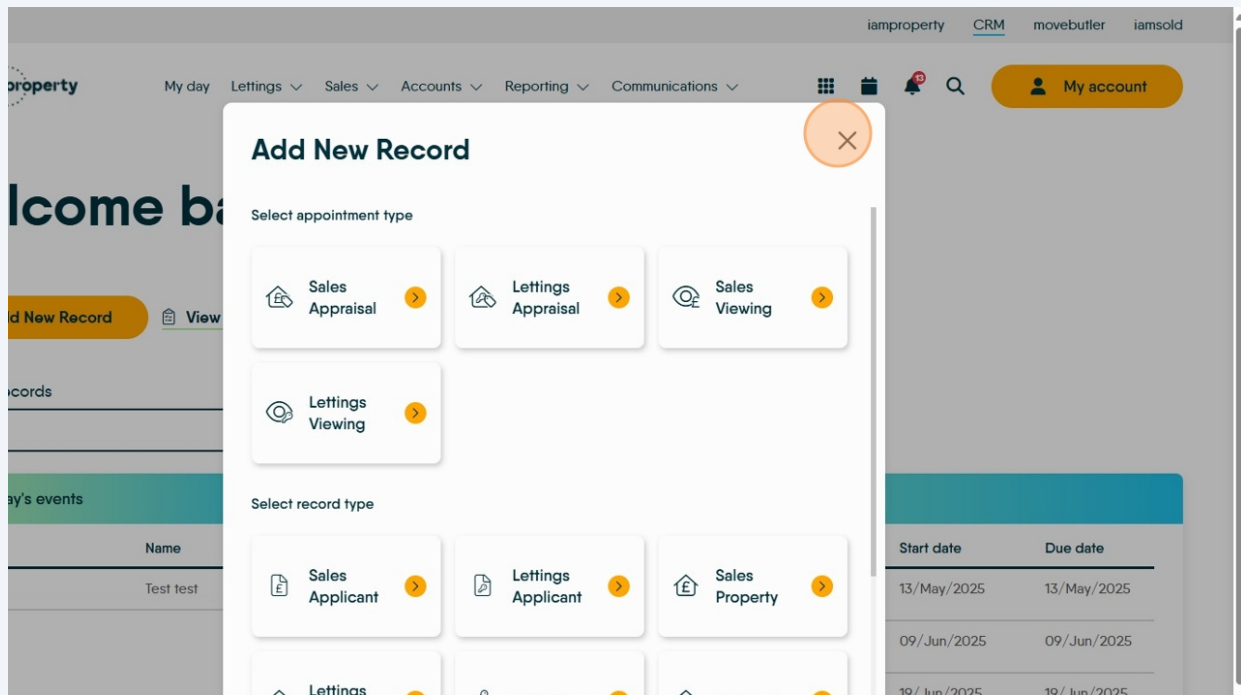
2 To add a new record in CRM. Click "Add New Record"

The screenshot shows the iamproperty CRM dashboard. The top navigation bar includes links for 'My day', 'Lettings', 'Sales', 'Accounts', 'Reporting', and 'Communications'. A search bar is present on the right. The main heading is 'Welcome back, Training'. Below this, there are three buttons: '+ Add New Record' (highlighted with an orange circle), 'View property management', and 'Visit help centre'. A search bar for 'Search all records' is located below these buttons. The dashboard is divided into two main sections: 'Today's events' and 'My tasks'. The 'Today's events' section shows a table with columns 'Time' and 'Name', containing one entry: '12:00' and 'Test test'. The 'My tasks' section shows a table with columns 'Status', 'Name', 'Priority', 'Start date', and 'Due date', containing three entries: 'Not Started', 'test', 'High', '13/May/2025', '13/May/2025'; 'Not Started', 'Make Tea', 'High', '09/Jun/2025', '09/Jun/2025'; and 'Not Started', 'test', 'High', '19/Jun/2025', '19/Jun/2025'.

3 Click "Select record type"

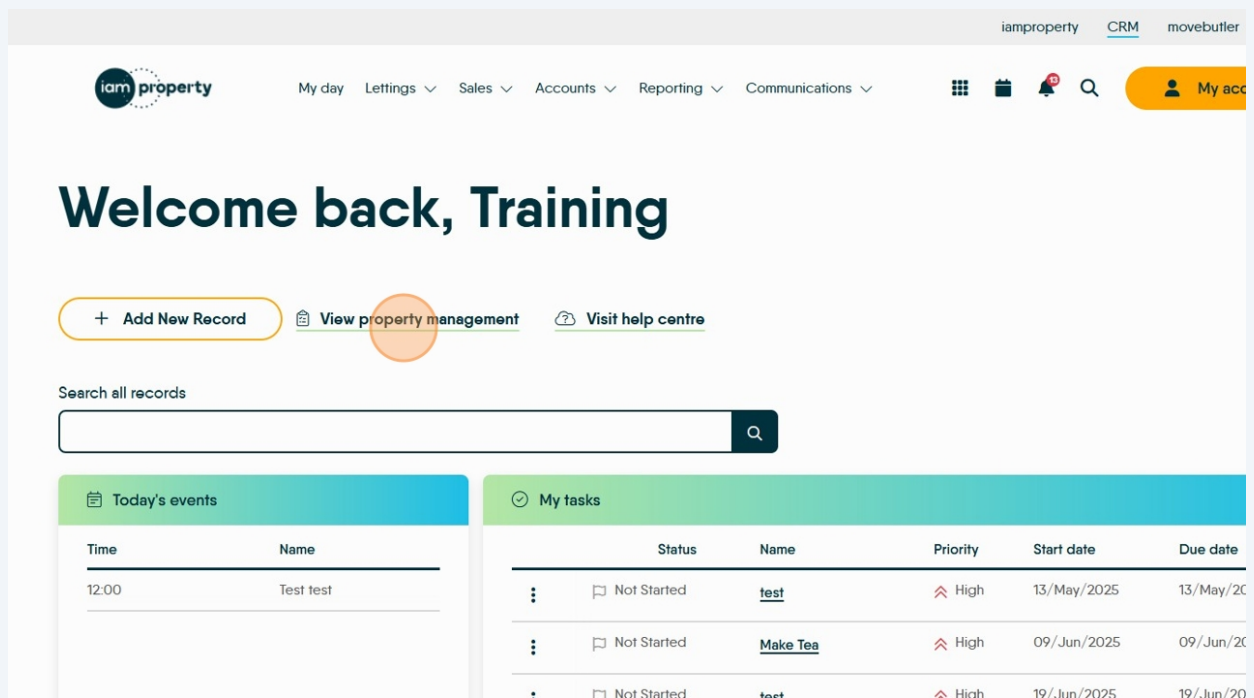
The screenshot shows the 'Add New Record' modal. The modal is titled 'Add New Record' and has a 'Select appointment type' section with three options: 'Sales Appraisal', 'Lettings Appraisal', and 'Sales Viewing'. Below this is a 'Select record type' section with six options: 'Sales Applicant', 'Lettings Applicant', 'Sales Property', 'Lettings Property', 'Landlord', and 'Portfolio'. An orange circle highlights the 'Lettings Viewing' option in the 'Select appointment type' section. The background shows the same dashboard as the previous screenshot, but with a grey overlay.

#### 4 Click "Close"



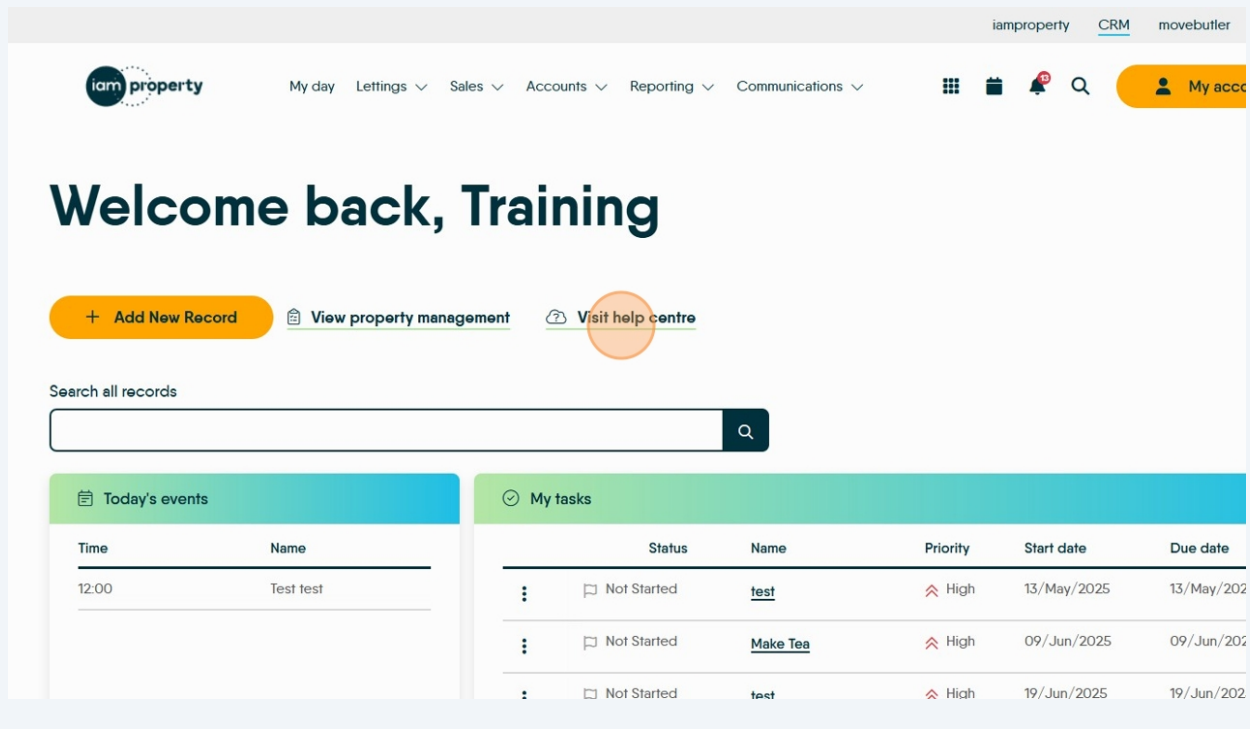
#### 5 By clicking "View property management" you can access the Property Management module and manage your property maintenance tasks

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



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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.



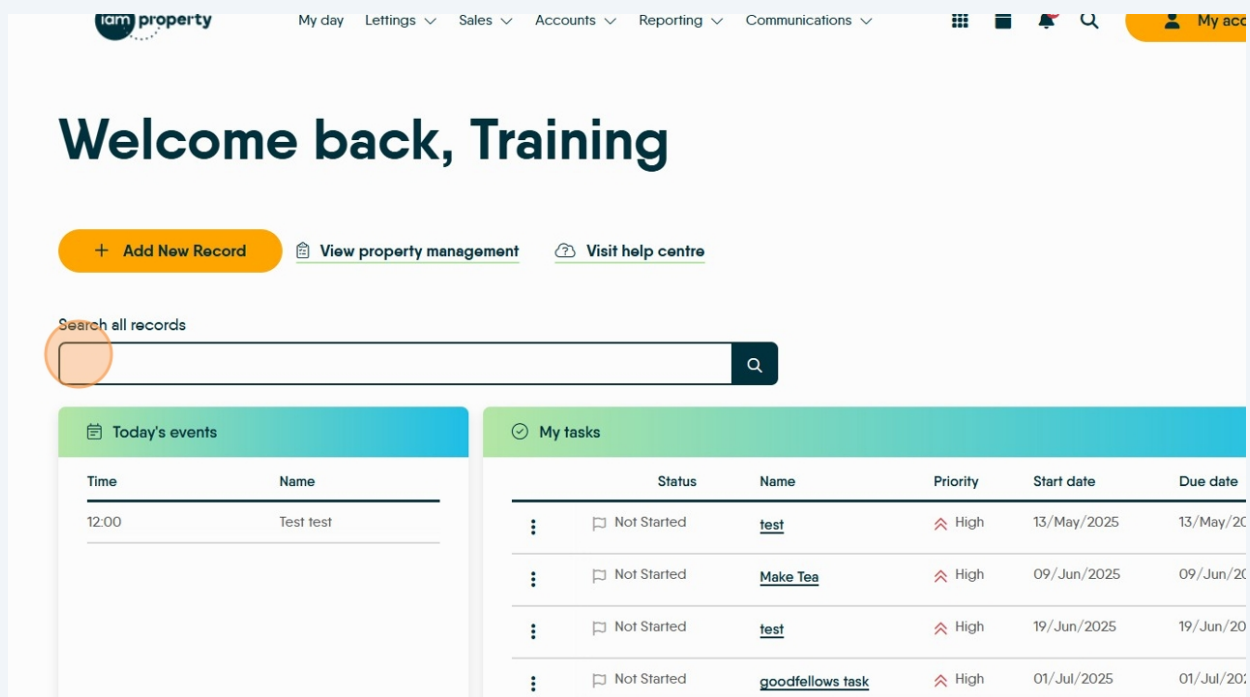
The screenshot shows the CRM dashboard with the following elements:

- Header:** iam property logo, navigation menu (My day, Lettings, Sales, Accounts, Reporting, Communications), and user profile (My account).
- Main Content:**
  - Welcome back, Training** header.
  - Buttons:** "+ Add New Record" (orange), "View property management" (blue), and "Visit help centre" (blue, highlighted with an orange circle).
  - Search bar:** "Search all records" with a search icon.
  - Today's events:** A table with columns Time and Name. One event is listed: 12:00, Test test.
  - My tasks:** A table with columns Status, Name, Priority, Start date, and Due date. Three tasks are listed:
 

Status	Name	Priority	Start date	Due date
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

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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 dashboard with the following elements:

- Header:** iam property logo, navigation menu (My day, Lettings, Sales, Accounts, Reporting, Communications), and user profile (My account).
- Main Content:**
  - Welcome back, Training** header.
  - Buttons:** "+ Add New Record" (orange), "View property management" (blue), and "Visit help centre" (blue).
  - Search bar:** "Search all records" with a search icon. The search bar is highlighted with an orange circle.
  - Today's events:** A table with columns Time and Name. One event is listed: 12:00, Test test.
  - My tasks:** A table with columns Status, Name, Priority, Start date, and Due date. Four tasks are listed:
 


Status	Name	Priority	Start date	Due date
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

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"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	<a href="#">test</a>
⋮ Not Started	<a href="#">Make Tea</a>
⋮ Not Started	<a href="#">test</a>
⋮ Not Started	<a href="#">goodfellows task</a>

 [View all tasks](#)


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"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

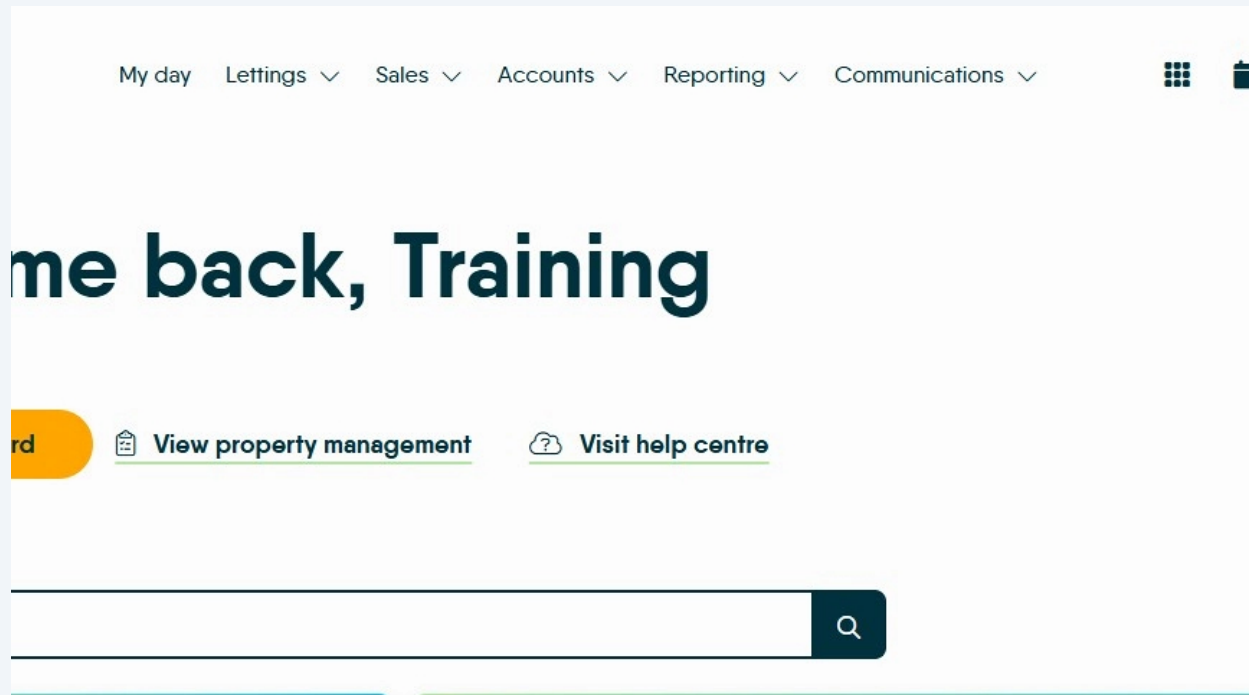
Status	Name	Priority	Start date	Due date
⋮ Not Started	<a href="#">test</a>	⬆ High	13/May/2025	13/May/2025
⋮ Not Started	<a href="#">Make Tea</a>	⬆ High	09/Jun/2025	09/Jun/2025
⋮ Not Started	<a href="#">test</a>	⬆ High	19/Jun/2025	19/Jun/2025
⋮ Not Started	<a href="#">goodfellows task</a>	⬆ High	01/Jul/2025	01/Jul/2025

 [View all tasks](#)

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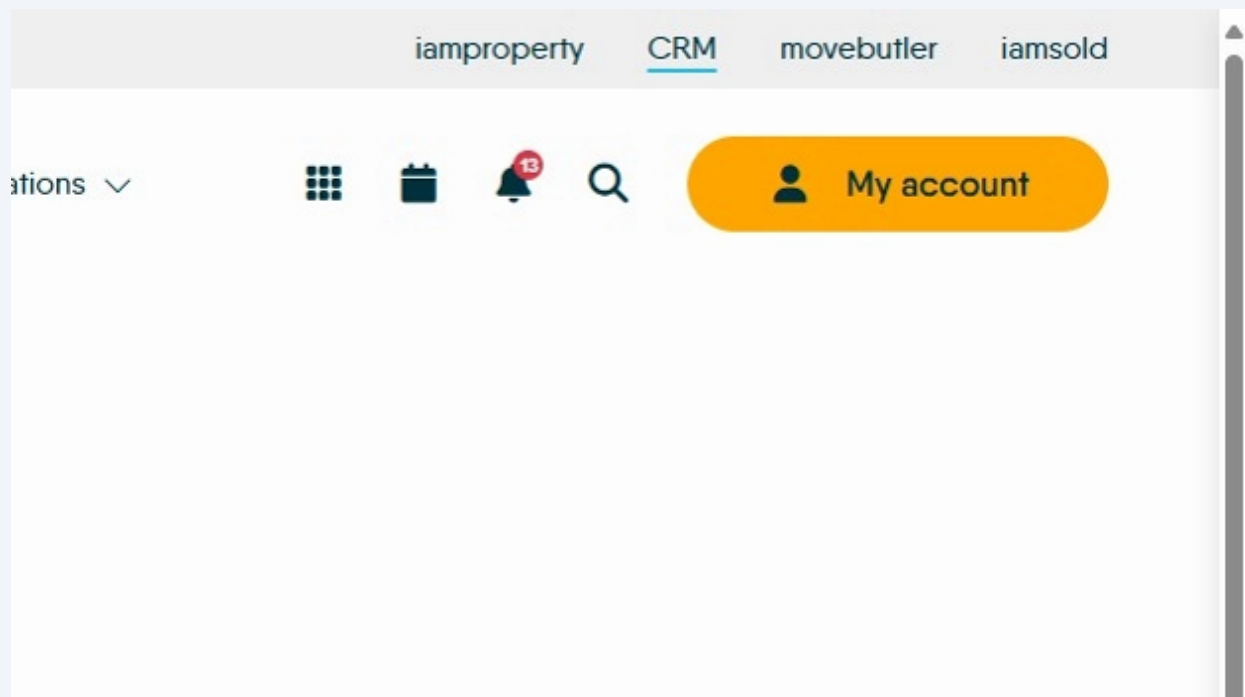
At the top of the My Day screen you will see all the menu tabs to access the modules you have enabled in CRM. These menu options are always available, regardless of where you are in CRM. Click 'My Day' to come back to this screen if you have moved away.

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



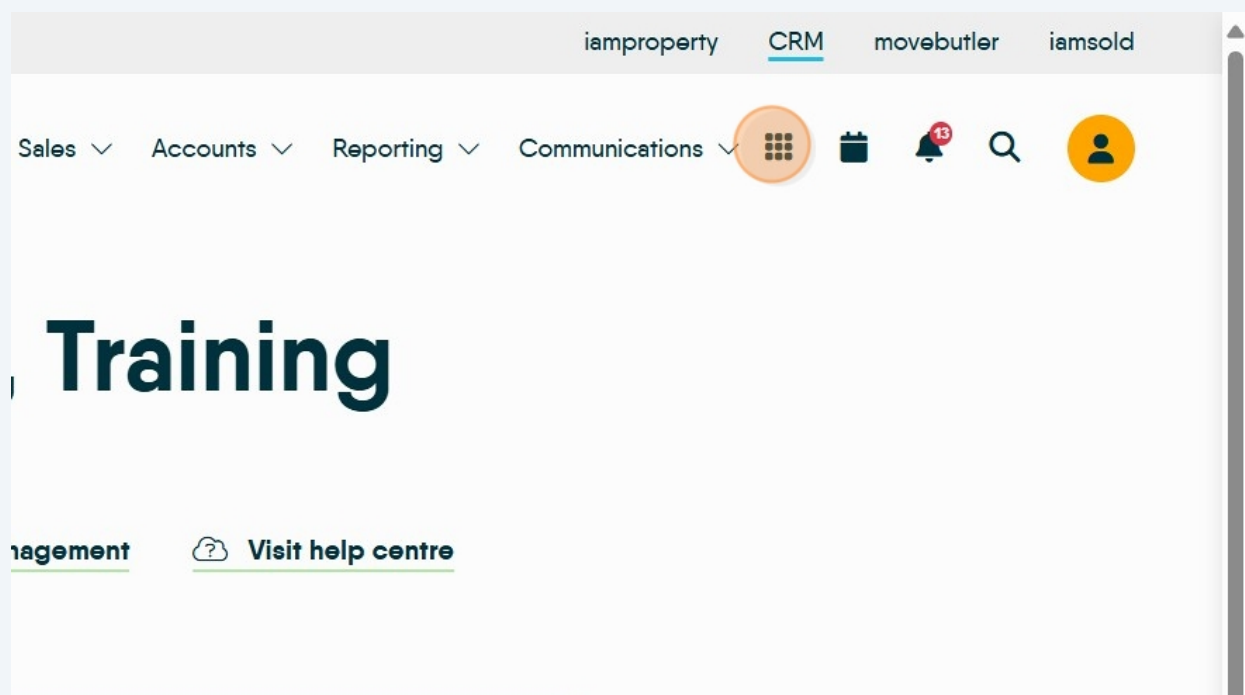
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To the right side of the screen you have the 'Bento' menu, Calendar, Notifications and search icons plus 'My Account'



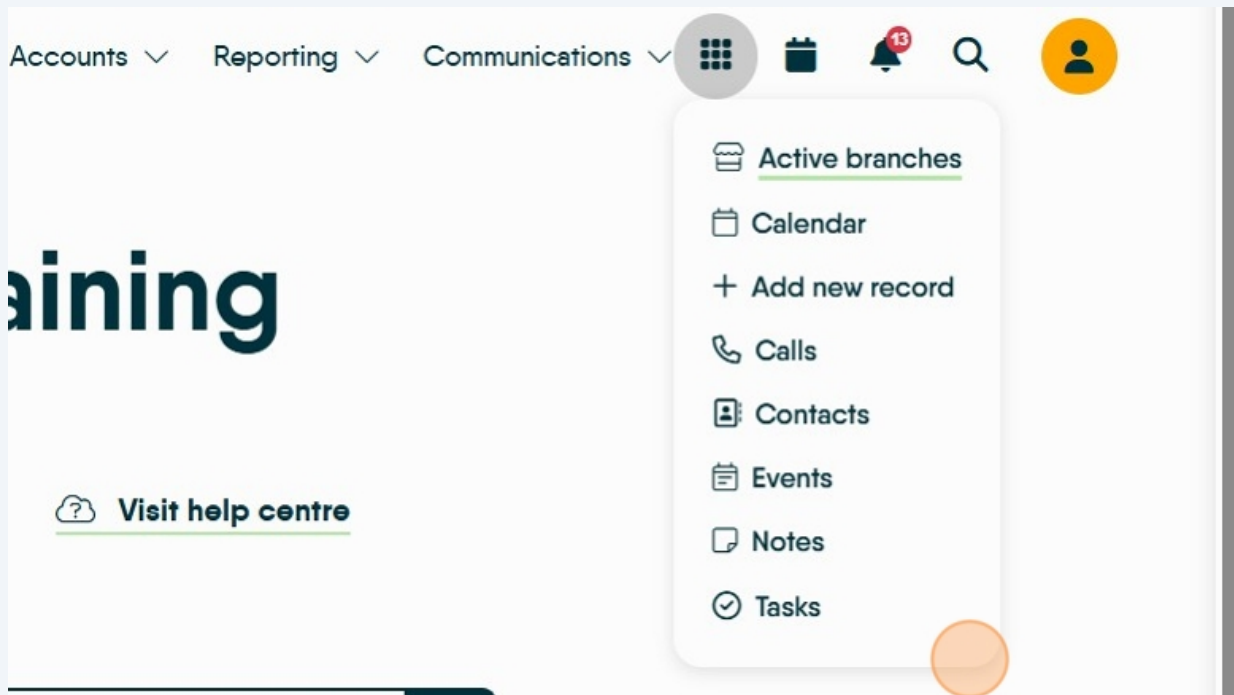
12

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



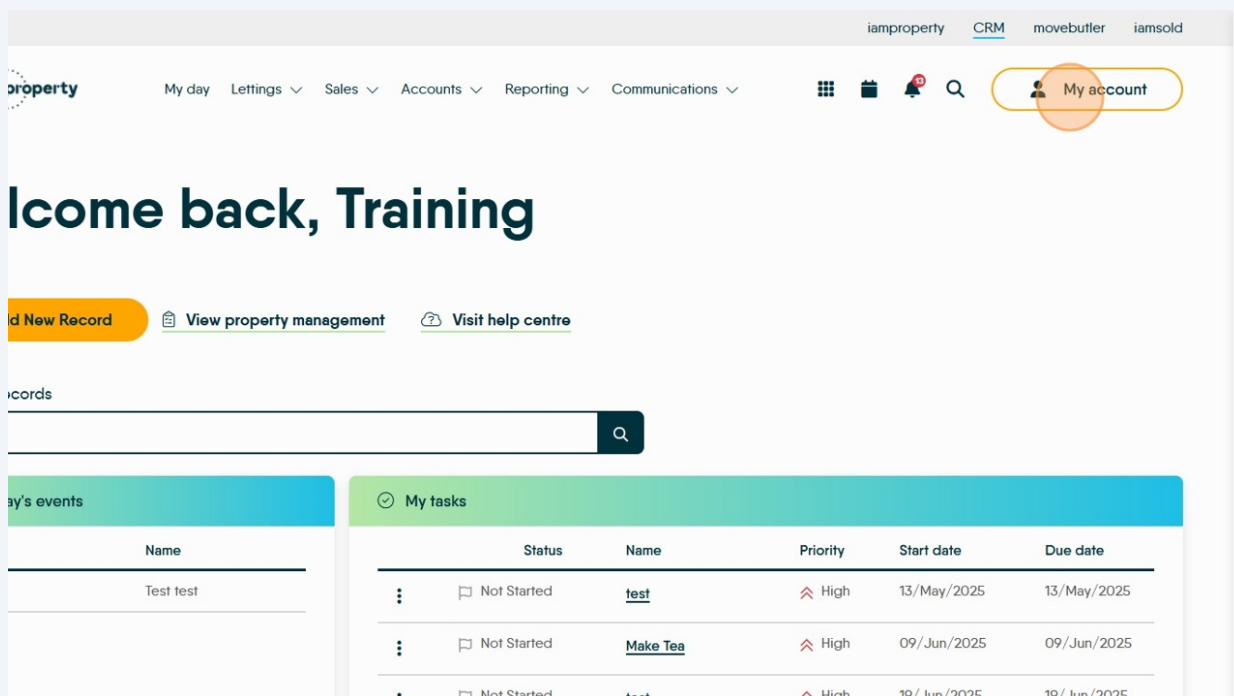
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This menu gives you quick access to various features from anywhere in the CRM. From here, calls can be logged, tasks created etc.



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Click "My account"





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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.

