

# Using 'My account' in CRM



This guide provides a step-by-step approach to effectively manage your personal account settings in CRM.

By following these instructions, users can easily update personal information, adjust security settings. As well as access Control Centre and configuration settings.

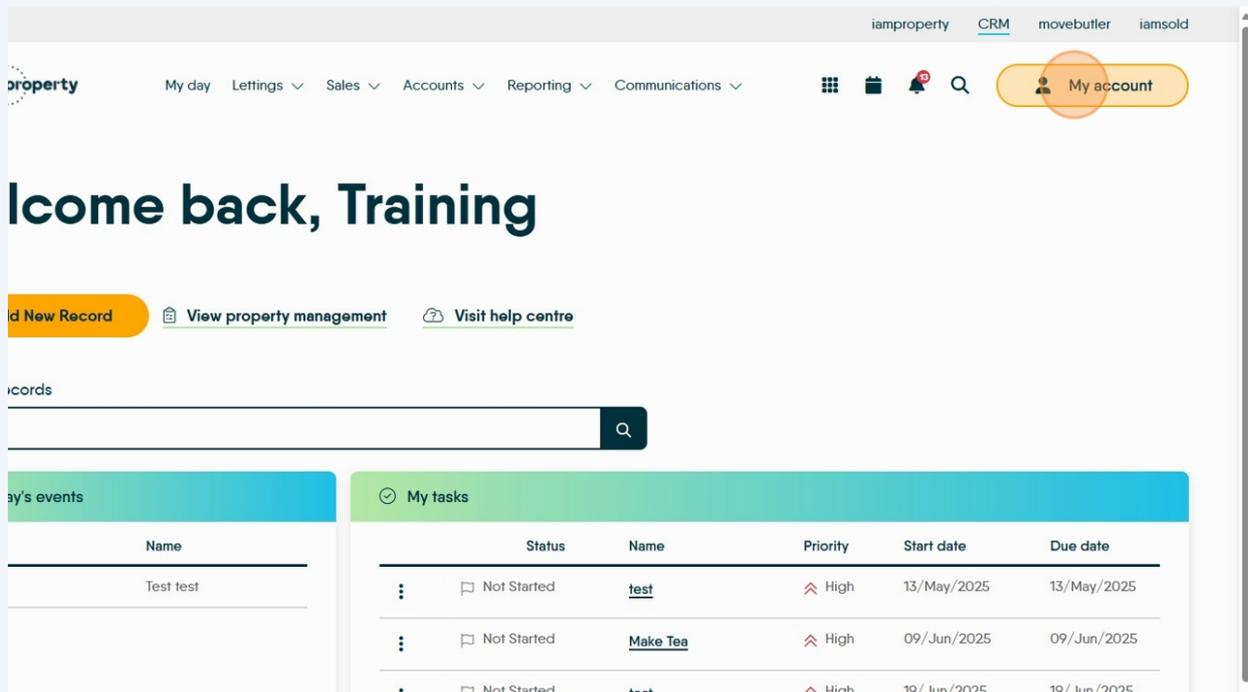
1 Navigate to <https://crm.iamproperty.com/MyDay>

The screenshot shows the CRM interface. At the top, there is a navigation menu with items: My day, Lettings, Sales, Accounts, Reporting, and Communications. On the right, there are icons for a grid, calendar, notifications, and search, along with a 'My account' button. The main heading is 'Welcome back, Training'. Below this are three buttons: '+ Add New Record', 'View property management', and 'Visit help centre'. A search bar is present with the placeholder text 'Search all records'. The dashboard is divided into two main sections: 'Today's events' and 'My tasks'. 'Today's events' has a table with columns 'Time' and 'Name', showing a single event at 12:00 named 'Test test'. 'My tasks' has a table with columns 'Status', 'Name', 'Priority', 'Start date', and 'Due date', listing four tasks: 'test', 'Make Tea', 'test', and 'goodfellows task', all with a status of 'Not Started' and 'High' priority.

Time	Name
12:00	Test test

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

## 2 Click "My account"

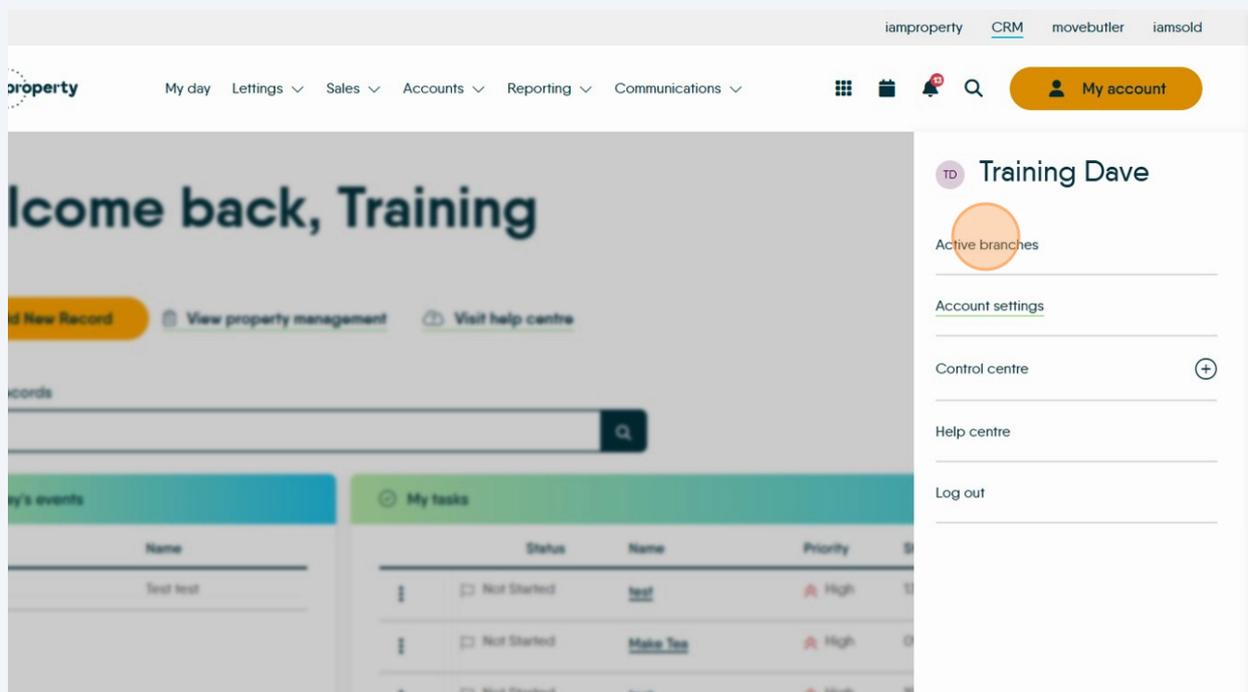


The screenshot shows the CRM dashboard with the 'My account' button highlighted in the top right corner. The dashboard includes a navigation menu, a search bar, and a 'My tasks' table.

Status	Name	Priority	Start date	Due date
<input type="checkbox"/> Not Started	test	High	13/May/2025	13/May/2025
<input type="checkbox"/> Not Started	Make Tea	High	09/Jun/2025	09/Jun/2025
<input type="checkbox"/> Not Started	test	High	19/Jun/2025	19/Jun/2025

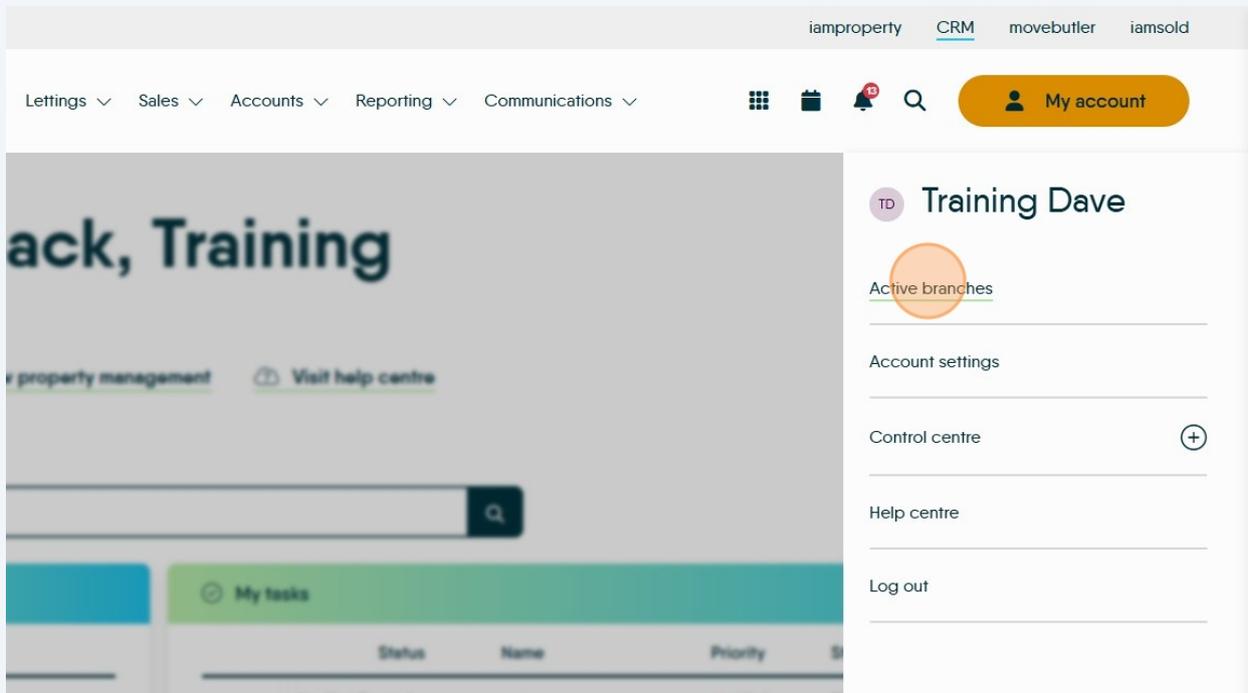
## 3 This will show a menu with a number of items.

Active Branches will show all the branches that are currently active on the logged in users account. Branches can be selected or deselected here.

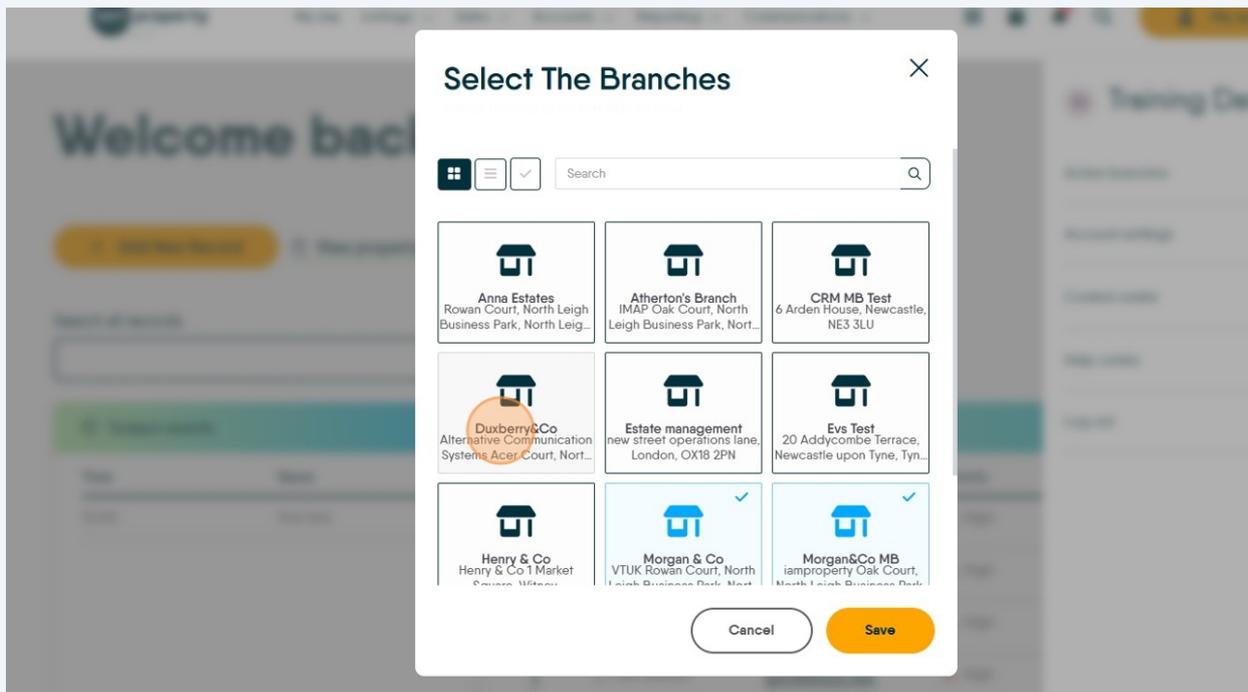


The screenshot shows the CRM dashboard with the 'My account' menu open on the right side. The menu items are: Training Dave, Active branches, Account settings, Control centre, Help centre, and Log out.

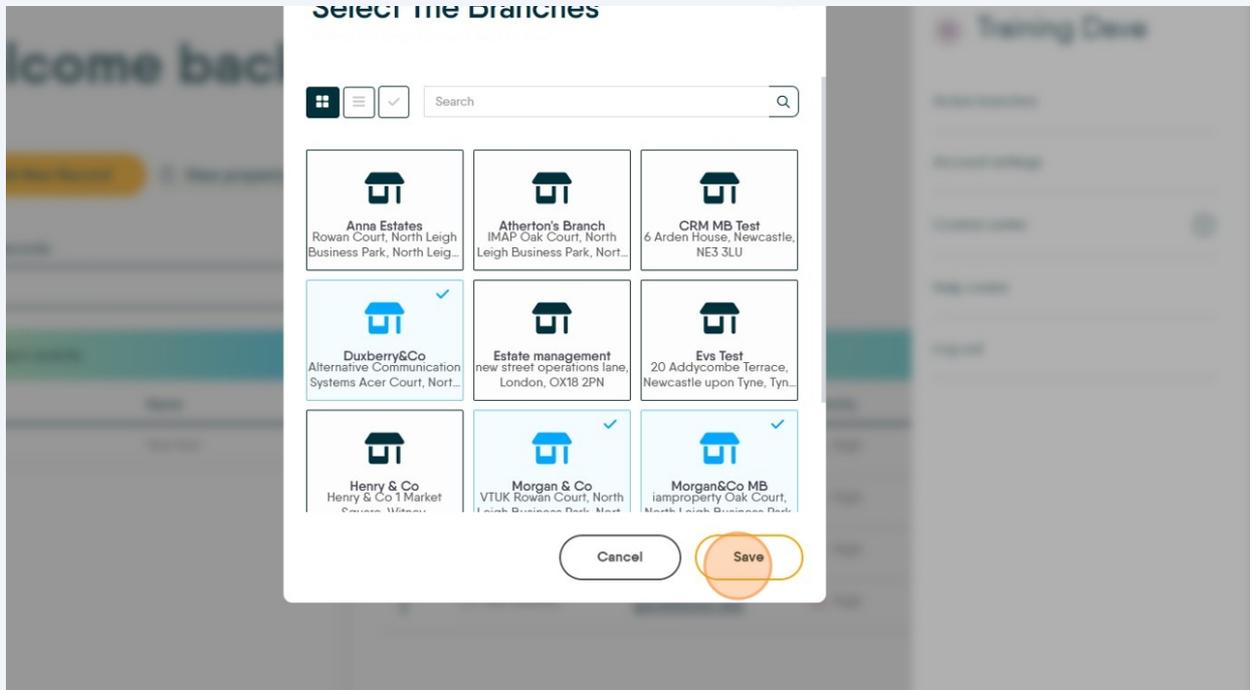
4 Click "Active branches"



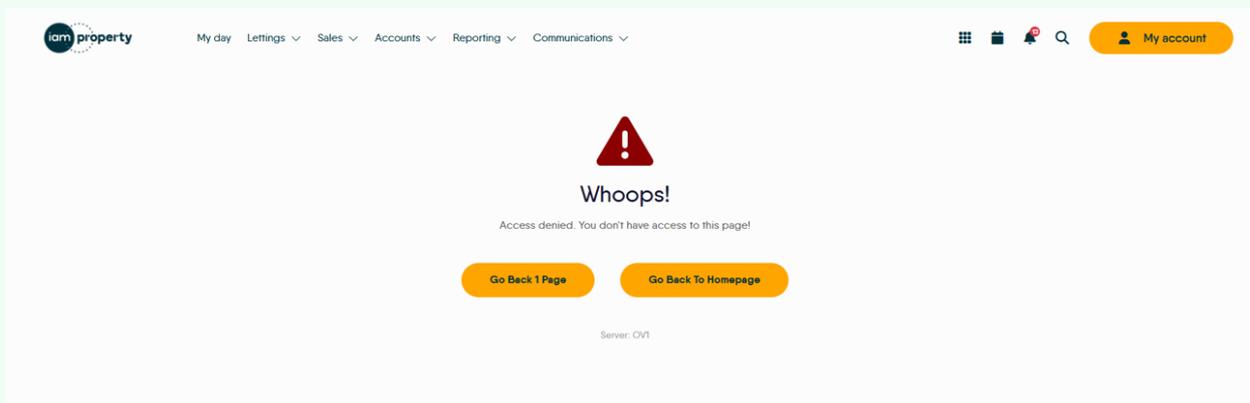
5 Click the branch you want to enable or disable . Enabled are blue with a tick in the right corner, disabled are black.



6 Click "Save". The user will now be able to see the data for the selected branches.

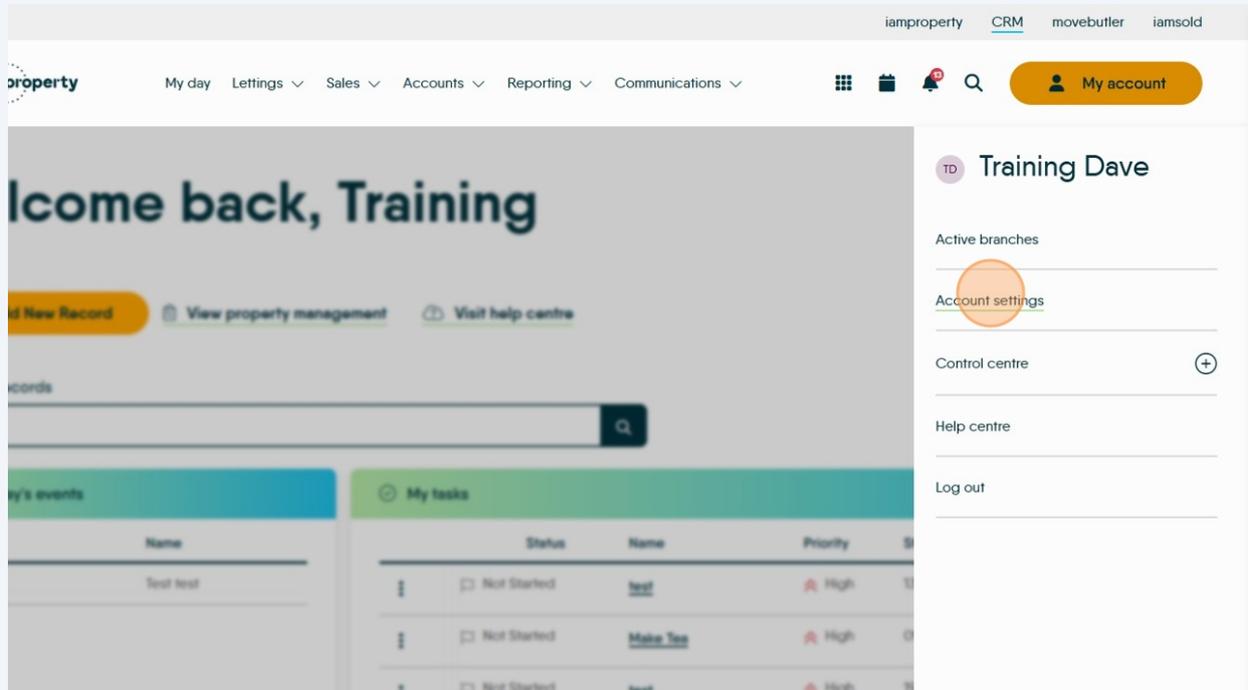


**i** Tip! If you see an error message informing that access is denied, it is possible this is due to not having a particular branch enabled. Enable your other branches and retry.



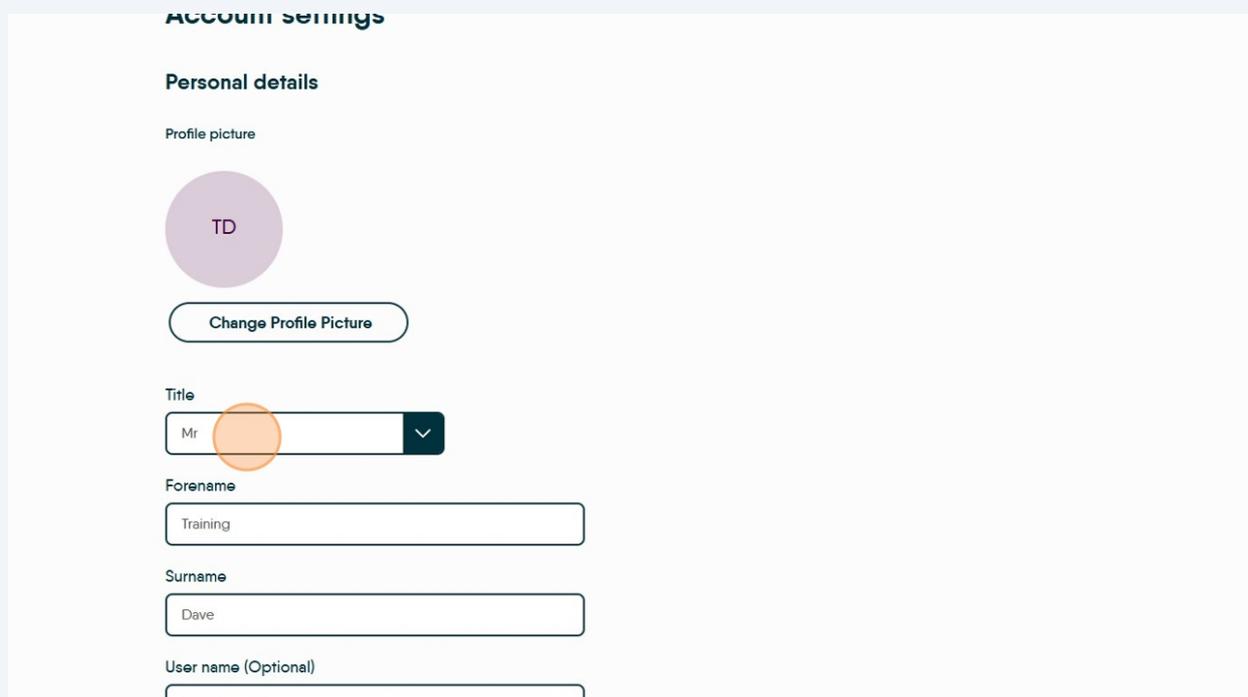
7

Click "Account settings" this option will allow you to update your personal details in CRM. This is important to do as there are parts of CRM that look at this information to complete merge fields in message or letter templates.



8

Click this dropdown.



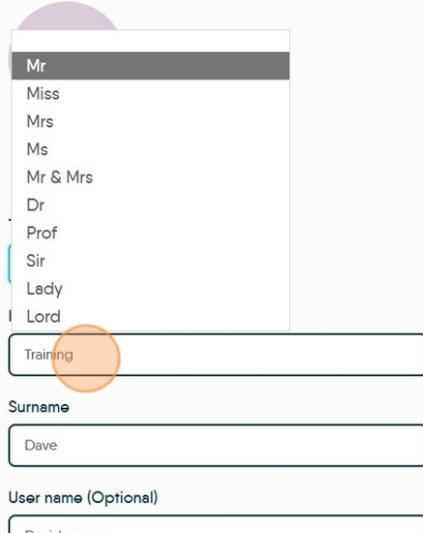
9

Click the "Forename" field and set the forename to be what you want CRM to call you.

### Account settings

#### Personal details

Profile picture



A screenshot of the 'Personal details' section in account settings. A dropdown menu is open, showing a list of titles: Mr, Miss, Mrs, Ms, Mr & Mrs, Dr, Prof, Sir, Lady, and Lord. The 'Mr' option is highlighted. Below the dropdown is a text input field containing the text 'Training', which is circled in orange. Below this field are other input fields for 'Surname' (containing 'Dave') and 'User name (Optional)' (containing 'D...').

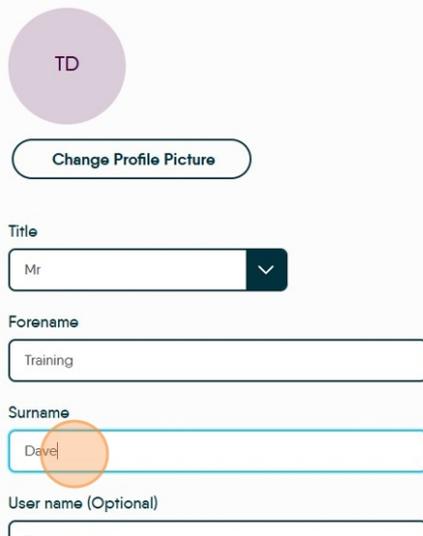
10

Click the "Surname" field.

### Account settings

#### Personal details

Profile picture



A screenshot of the 'Personal details' section in account settings. A circular profile picture with the initials 'TD' is shown. Below it is a button labeled 'Change Profile Picture'. Below the button is a 'Title' dropdown menu with 'Mr' selected. Below the title dropdown is a 'Forename' text input field containing 'Training'. Below the forename field is a 'Surname' text input field containing 'Dave', which is circled in orange. Below the surname field is a 'User name (Optional)' text input field containing 'D...'. There is also a 'Change Profile Picture' button below the profile picture.

11

Click the "User name" field to update your username. You can use this to log into CRM rather than your email address.

The screenshot shows the CRM user profile page. The header includes the 'iam property' logo, navigation menus for 'My day', 'Lettings', 'Sales', 'Accounts', 'Reporting', and 'Communications', and a top right area with 'iamproperty', 'CRM', 'movebutler', and a 'My acc' button. The profile form contains the following fields: 'User name (Optional)' with the value 'Davidmorgan' (highlighted with an orange circle), 'Email Address' with 'david.morgan@iamproperty.com', 'Phone (Optional)' with '01865 860 873', 'Mobile Phone (Optional)' with '07711223344' (13 / 15 characters), 'Work phone (Optional)' with '01865 860 873' (11 / 15 characters), and 'Company' with 'ovhomes.com' (13 / 15 characters). A 'Main branch' label is visible at the bottom left.

12

Click the "Email Address" field.  
Click the "Phone" field.  
Click the "Mobile Phone" field.  
Click the "Work phone" field.  
Click "Save personal details"

This screenshot is identical to the one above, showing the CRM user profile page. In this instance, the 'Email Address' field, containing 'david.morgan@iamproperty.com', is highlighted with an orange circle. All other elements, including the header, navigation, and other form fields, remain the same.



User name (Optional)

Email Address

Phone (Optional)

13 / 15

Mobile Phone (Optional)

11 / 15

Work phone (Optional)

13 / 15

Company

Main branch

User name (Optional)

Email Address

Phone (Optional)

13 / 15

Mobile Phone (Optional)

11 / 15

Work phone (Optional)

13 / 15

Company

Main branch

User name (Optional)

Davidmorgan

Email Address

david.morgan@iamproperty.com

Phone (Optional)

01865 860 873

Mobile Phone (Optional)

07711223344

13 / 15

Work phone (Optional)

01865 860 873

11 / 15

Company

ovhomes.com



13 / 15

Main branch

Morgan & Co



Save Personal Details

User name (Optional)

Davidmorgan

Email Address

david.morgan@iamproperty.com

Phone (Optional)

01865 860 873

Mobile Phone (Optional)

07711223344

13 / 15

Work phone (Optional)

01865 860 873

11 / 15

Company

ovhomes.com



13 / 15

Main branch

Morgan & Co



Save Personal Details

**13** Click "here to update your personal GDPR on CRM

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**GDPR preferences**

Do not contact this user

Email

Letter

SMS

Allow Third Party

Allow Marketing

Select Agent

Training Dave 

Date Checked (Optional)

11/12/2023

[Update GDPR Preferences](#)

**14** Click here to change your password for CRM.

Allow Marketing

Select Agent

Training Dave 

Date Checked (Optional)

11/12/2023

[Update GDPR Preferences](#)

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**Security**

Password

[Change Password](#)

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