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.
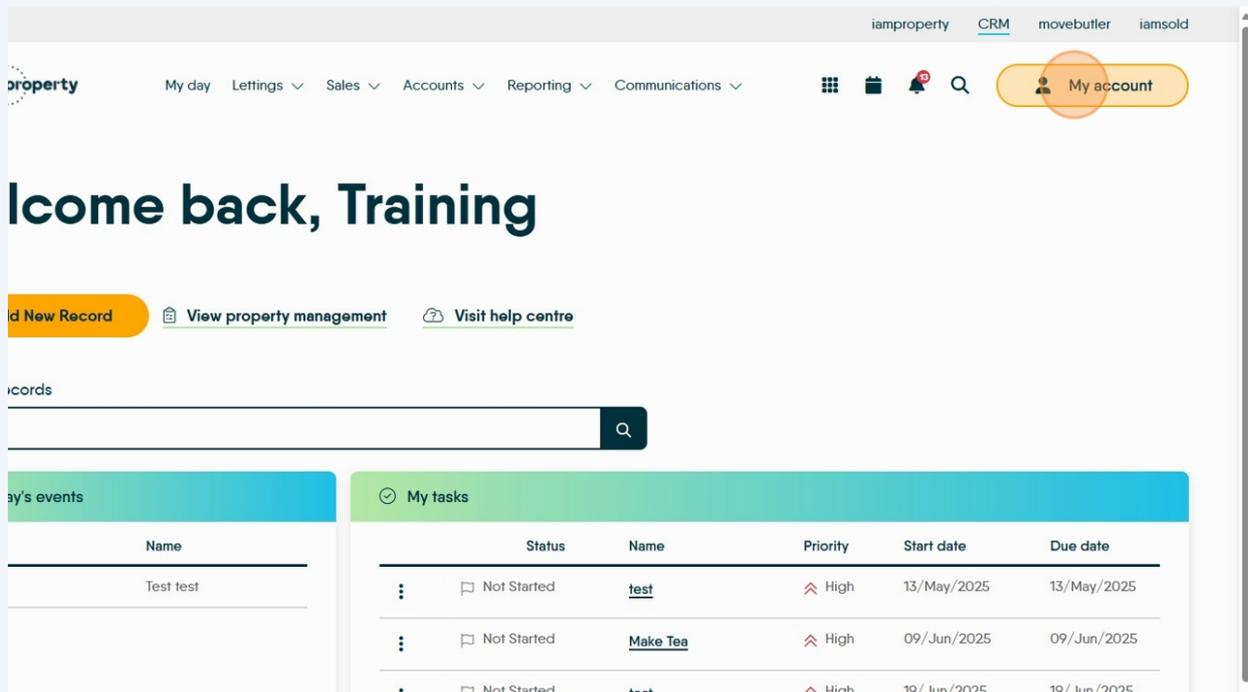
1   Navigate to **https://crm.iamproperty.com/MyDay**

2 Click "My account"

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.
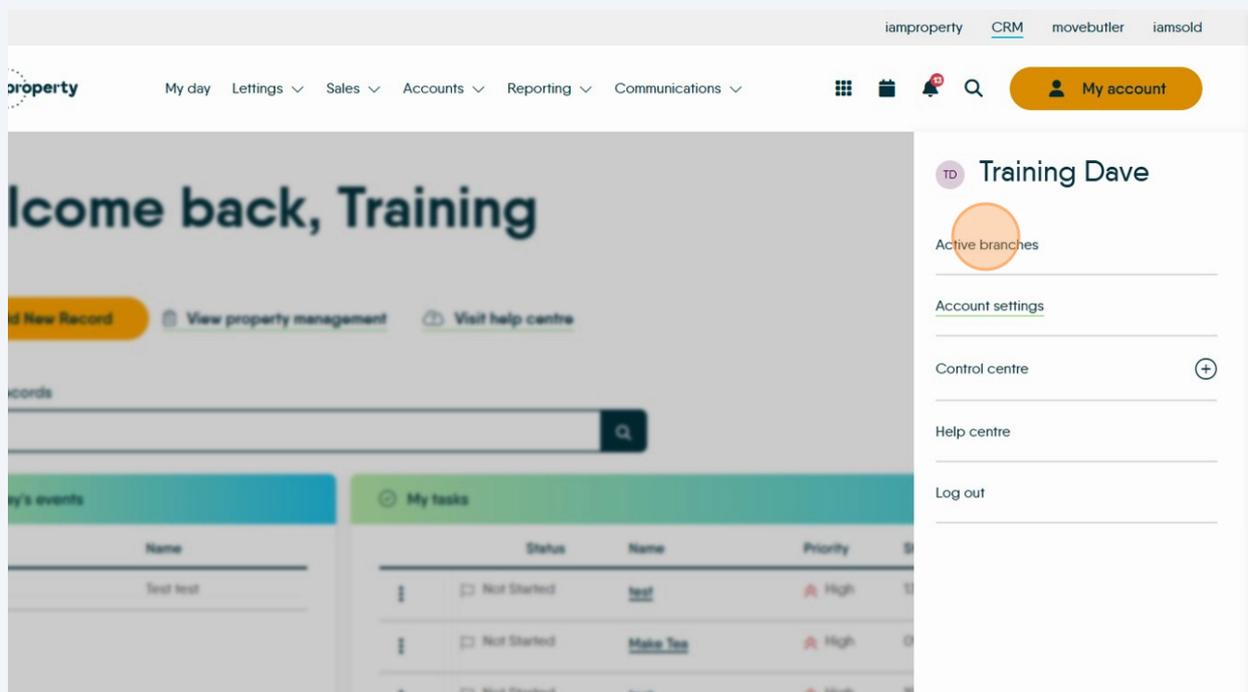
4 Click "Active branches"

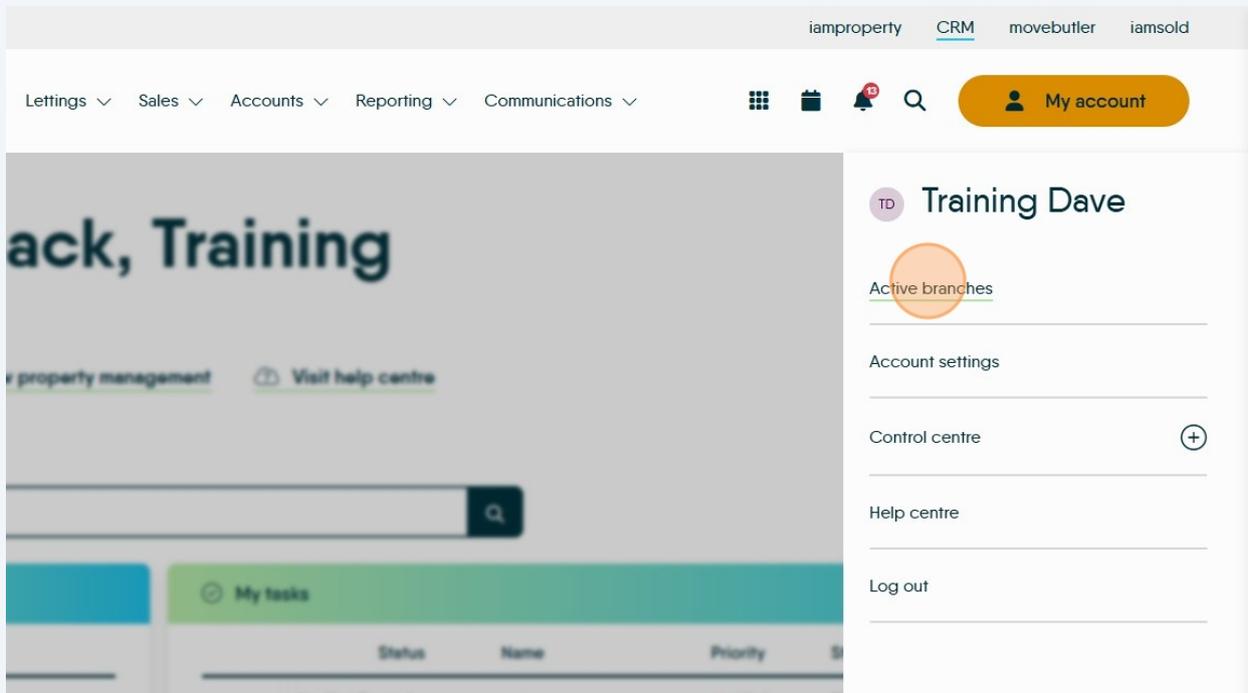**5** Click the branch you want to enable or disable . Enabled are blue with a tick in the right corner, disabled are black.
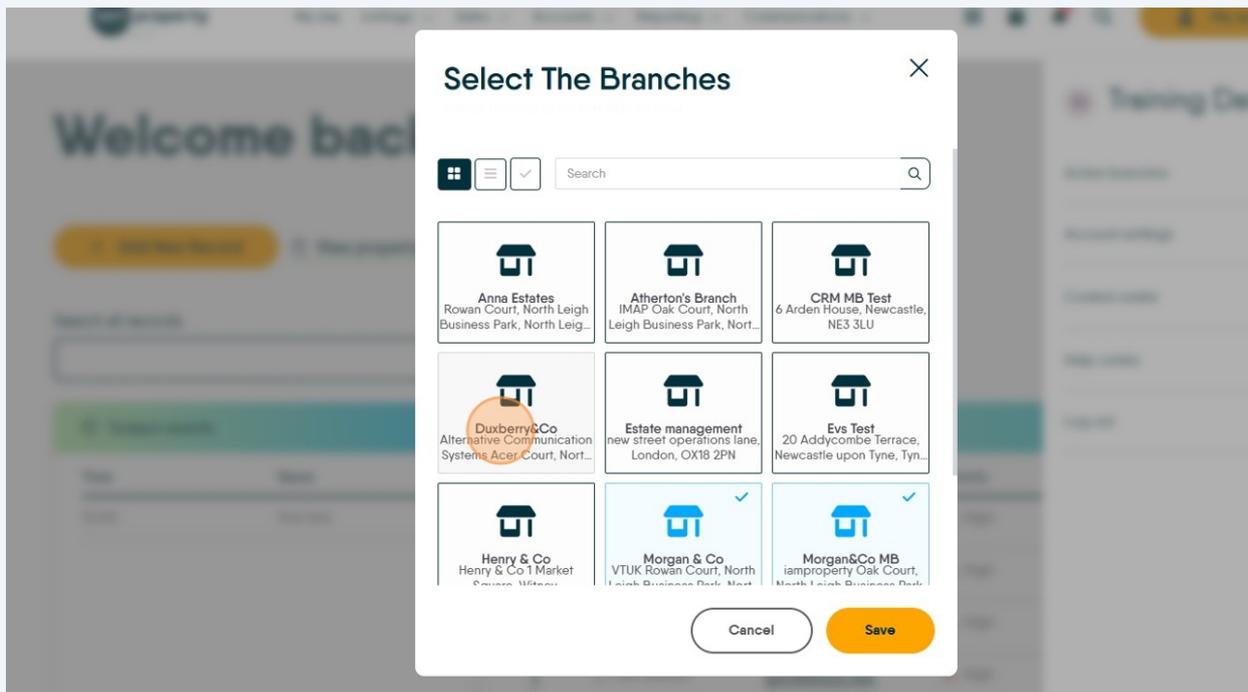
6 Click "Save". The user will now be able to see the data for the selected branches.

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.

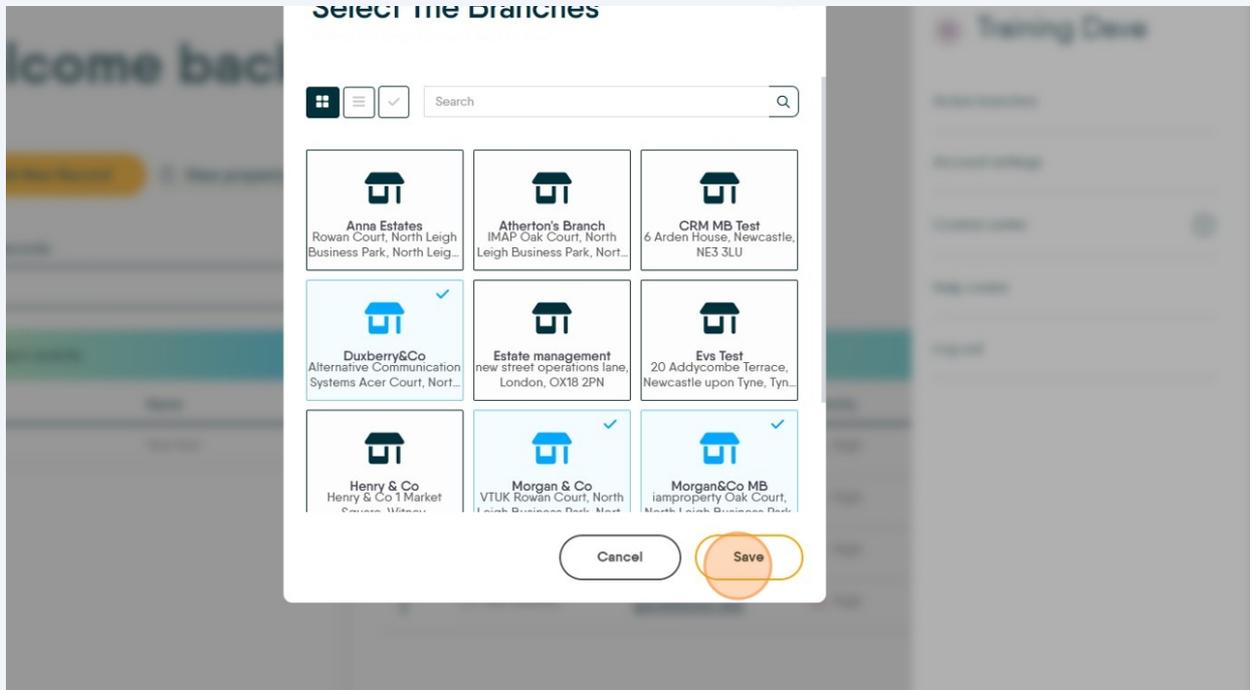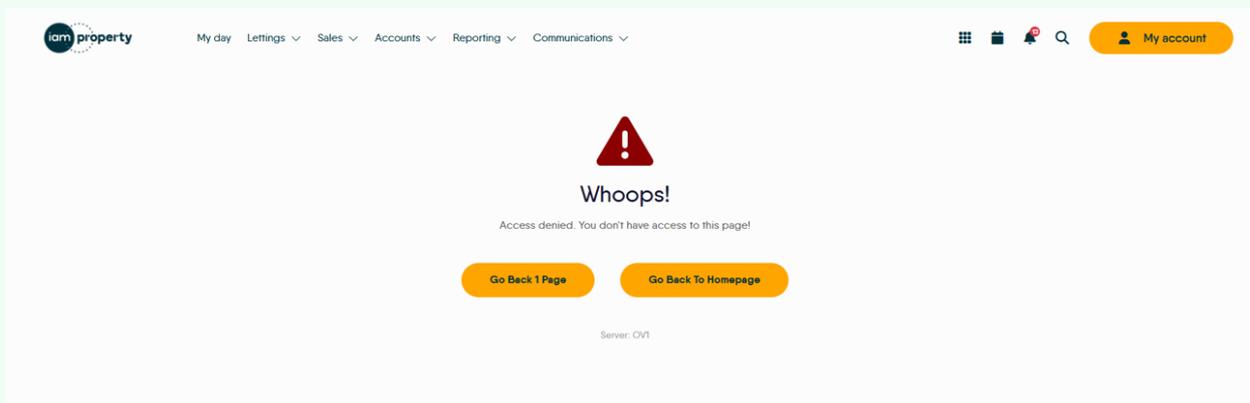**7** Click "Account settings" this option will allow you to update your personal details in CRM. This is important to do as there are parts of CRM that look at this information to complete merge fields in message or letter templates.
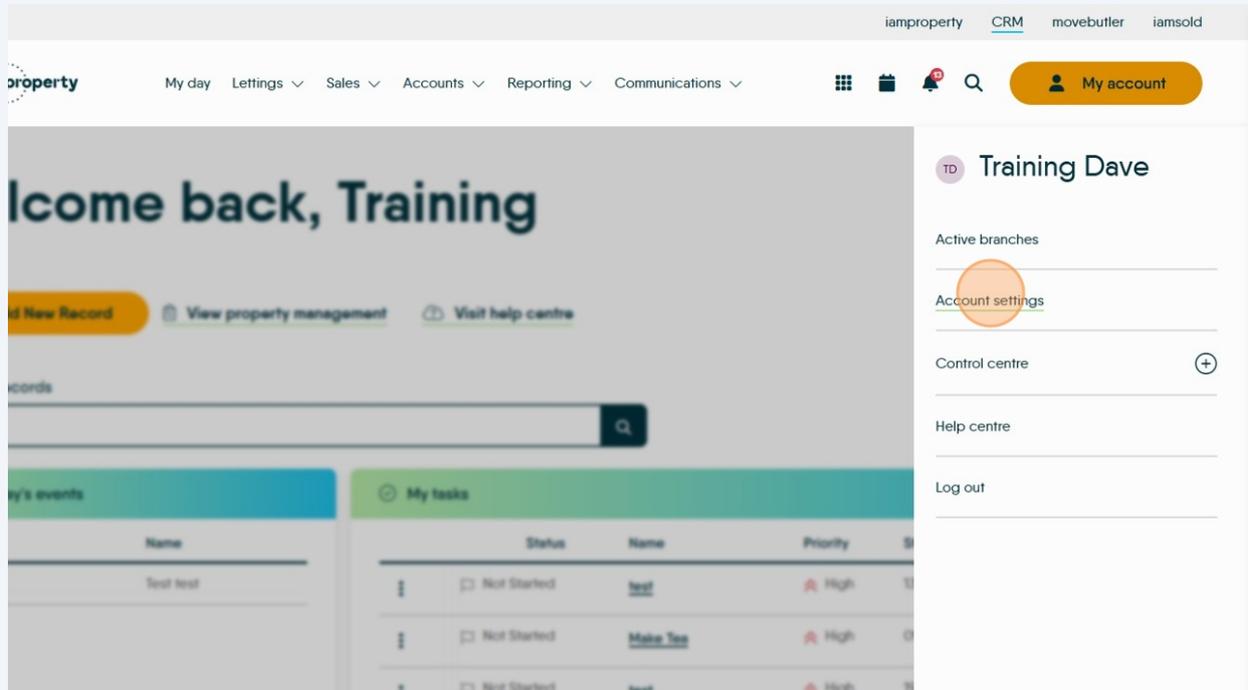
8 Click this dropdown.

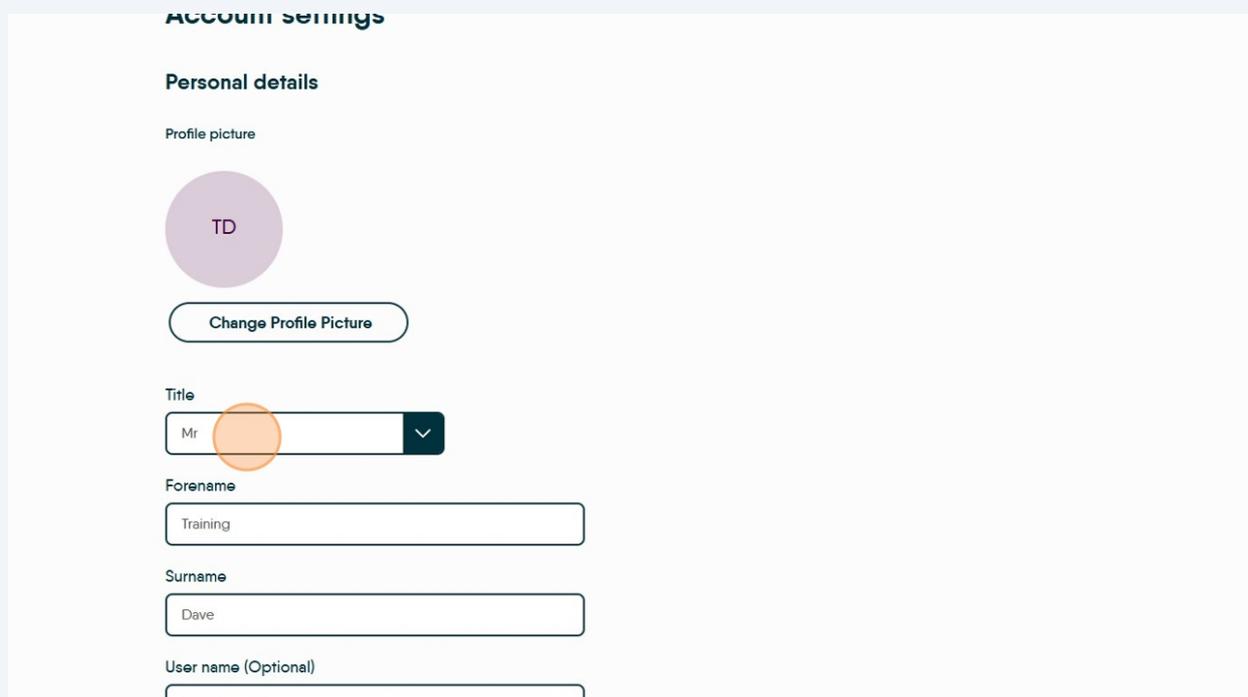**9** Click the "Forename" field and set the forename to be what you want CRM to call you.

Account settings
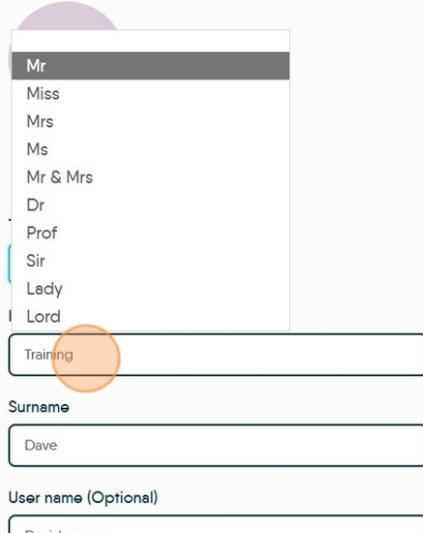
Personal details

Profile picture

| Mr |
| Miss |
| Mrs |
| Ms |
| Mr & Mrs |
| Dr |
| Prof |
| Sir |
| Lady |
| Lord |

Training

Surname

Dave

User name (Optional)

10 Click the "Surname" field.

Account settings
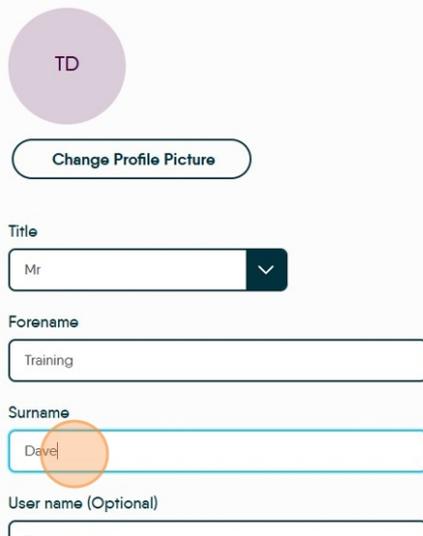
Personal details

Profile picture

TD

Change Profile Picture

Title

Mr

Forename

Training

Surname

Dave

User name (Optional)

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

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

iam property

My day   Lettings ⌄   Sales ⌄   Accounts ⌄   Reporting ⌄   Communications ⌄

User name (Optional)

Davidmorgan

Email Address

david.morgan@iamproperty.com

Phone (Optional)

01865 860 873

13 / 15

Mobile Phone (Optional)

07711223344

11 / 15

Work phone (Optional)

01865 860 873

13 / 15

Company

ovhomes.com 🔒

Main branch

User name (Optional)

Davidmorgan

Email Address

david.morgan@iamproperty.com

Phone (Optional)

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Mobile Phone (Optional)

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Main branch

Morgan & Co 🔒

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13 / 15

Company

ovhomes.com 🔒

Main branch

Morgan & Co 🔒

Save Personal Details

13 Click "here to update your personal GDPR on CRM

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

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14 Click here to change your password for CRM.

☑ Allow Marketing

Select Agent

Training Dave ⌄

Date Checked (Optional)

11/12/2023

Update GDPR Preferences

Security

Password

Change Password