

Setting a New Password for a User



This guide provides a straightforward process for an Admin user to set a new password for a user in the CRM system, ensuring security and access management.

By following the clear steps outlined, users can efficiently update passwords, enhancing their account protection.



Alert! To use this process you will need access to Control Centre.

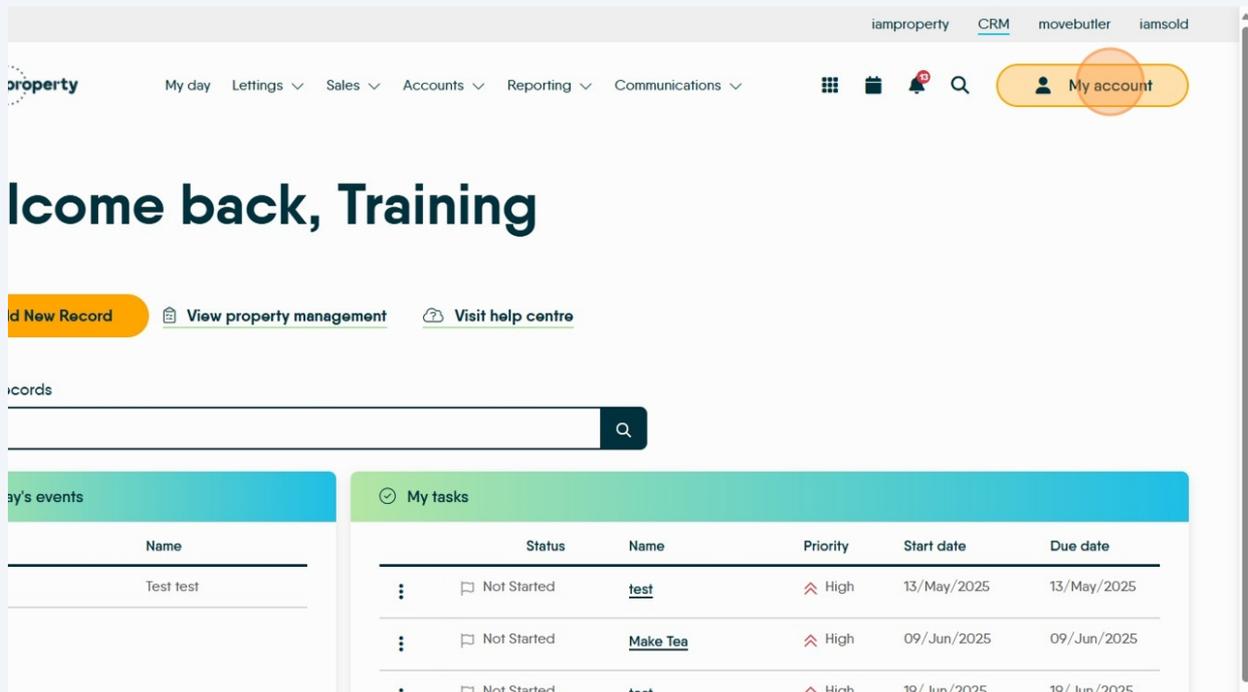
1 Navigate to <https://crm.iamproperty.com/MyDay>

The screenshot shows the CRM MyDay dashboard. At the top, there is a navigation bar with the iam property logo, menu items (My day, Lettings, Sales, Accounts, Reporting, Communications), and utility icons (grid, calendar, notifications, search, and a 'My account' button). Below the navigation bar, a large heading reads 'Welcome back, Training'. Underneath, there are three buttons: '+ Add New Record', 'View property management', and 'Visit help centre'. A search bar labeled 'Search all records' is present. The main content area is divided into two panels: 'Today's events' and 'My tasks'. The 'Today's events' panel shows a table with one event at 12:00 named 'Test test'. The 'My tasks' panel shows a table with three tasks, all with a status of 'Not Started' and a priority of 'High'.

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

2 Click "My account"

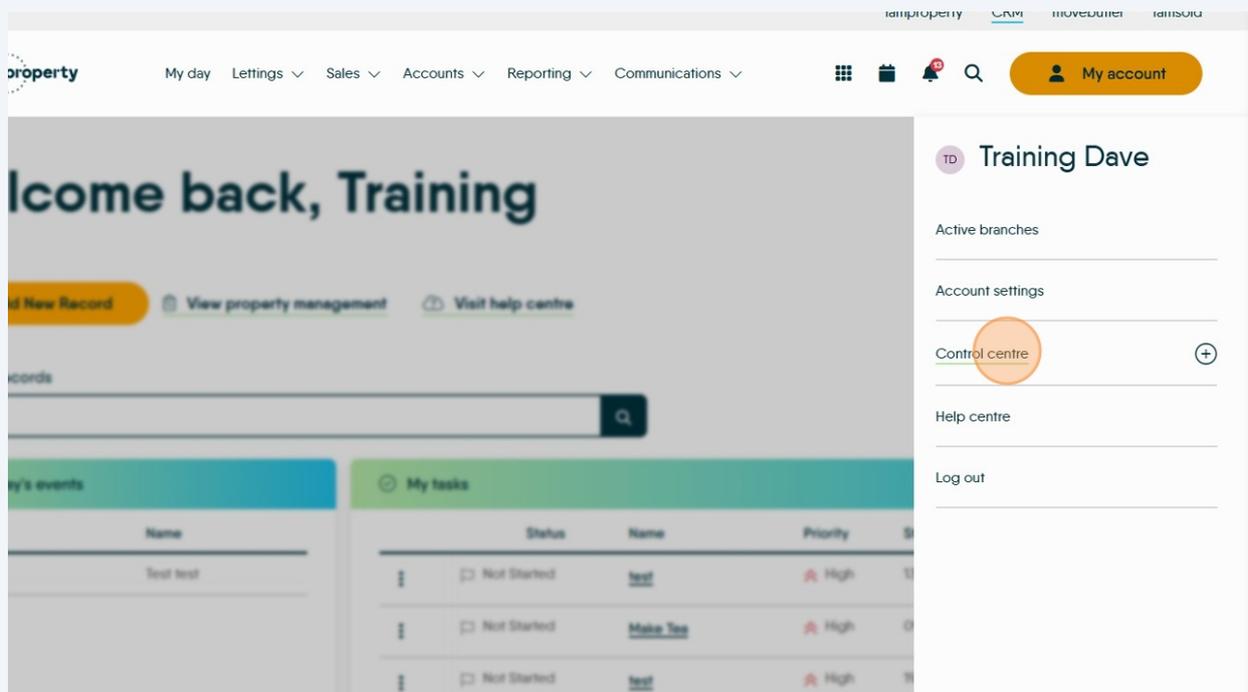


The screenshot shows the CRM dashboard with the 'My account' button highlighted in the top right corner. The dashboard includes a navigation menu, a search bar, and a 'My tasks' table.

Status	Name	Priority	Start date	Due date
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

3 Click "Control centre"

If you cannot see Control Centre, or once accessed you do not see the Users menu, speak to your companies CRM administrator to have this feature enabled.

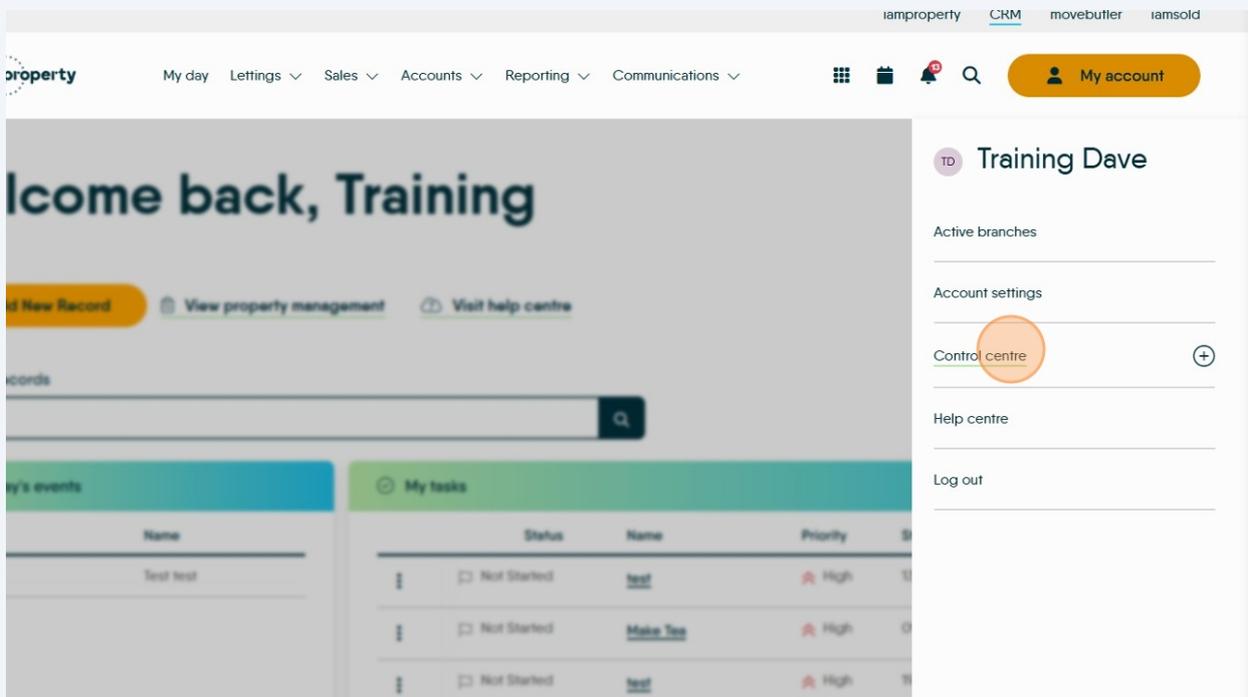


The screenshot shows the CRM dashboard with the 'My account' button highlighted in the top right corner. The 'My account' dropdown menu is open, showing the 'Control centre' option highlighted.

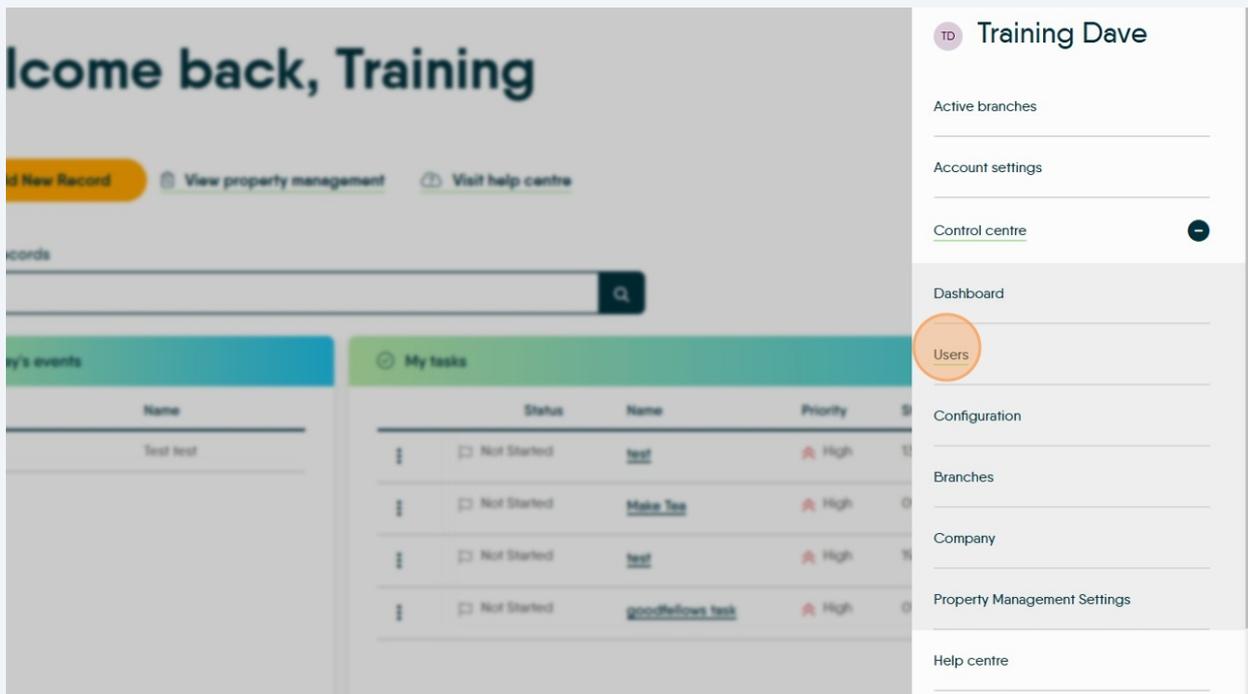
My account

- Training Dave
- Active branches
- Account settings
- Control centre (+)
- Help centre
- Log out

4 Click "Control centre"



5 Click "Users"



6 Click "Employees"

The screenshot shows a user management interface. On the left, there is a sidebar with a 'Clear filters' section containing 'Branch' (All) and 'Filter Status' (All (excluding Archived)). Below this is a list of user categories: Contractors, Employees (highlighted with an orange circle), Landlords, Lettings Applicants, Sales Applicants, Tenants, and Vendors. The main area features a table with columns for Name, Email, and Username. The first row is 'VTUK USER' with email 'ClientTraining@vtuk.com' and username 'VTUKUSER292'. Other rows include 'Ian Henry', 'David-George Morgan', 'Topsy Turvey', 'Training Dave', 'Christian Bale', 'Natalie Portman', 'Dan Carter', 'Owen Farrell', and 'Weekender One'. At the top of the table are buttons for '+ Add New User' and 'Register Portal Users', and a search bar. On the right, there are 'Modules' (Accounts, Client Portals, Control Centre, E-Sign, Inspections, LetZone, Lettings, Reporting Dashboard, Sales, SalesAutomation, Property Management) and 'Roles' (Administrator, Negotiator, Property Manager). The bottom of the table shows '1 to 10 of 36' and 'Page 1 of 4'.

7 Click here to see the menu.

The screenshot shows the same user management interface as in step 6, but with the 'Users' menu item in the top navigation bar highlighted with an orange circle. The top navigation bar includes the 'iam property' logo, 'My day', 'Lettings', 'Sales', 'Accounts', 'Reporting', 'Communications', and 'My acc'. The sidebar and table content are identical to the previous screenshot.

8 Click "Set Password"

The screenshot shows a user management interface. On the left, there are filter options for Branch (All), Filter Status (All (excluding Archived)), and a list of user roles: Contractors, Employees (highlighted), Landlords, Lettings Applicants, Sales Applicants, Tenants, and Vendors. The main area displays a table of users with columns for Name, Email, and Username. The user 'David-George Morgan' is selected, and a context menu is open over his row, with the 'Set Password' option highlighted. The table data is as follows:

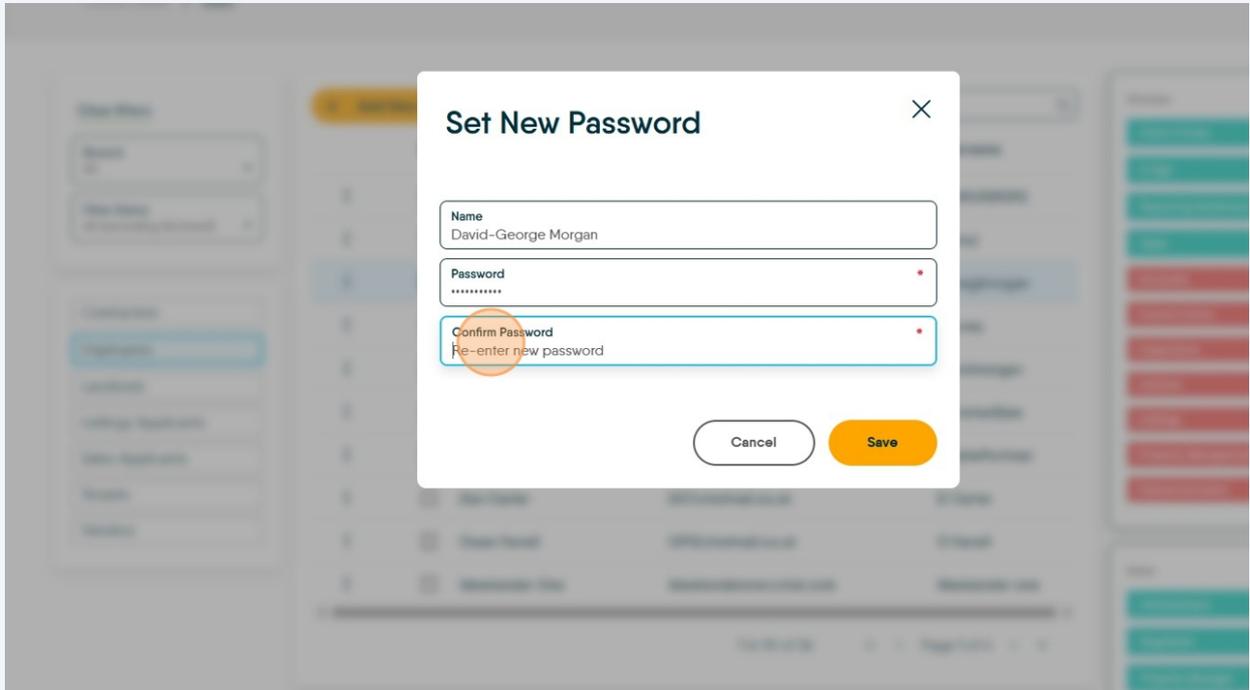
	Name	Email	Username
<input type="checkbox"/>	VTUK USER	ClientTraining@vtuk.com	VTUKUSER292
<input type="checkbox"/>	Ian Henry	ian.henry@iamproperty.com	HenryI
<input checked="" type="checkbox"/>	David-George Morgan	DGL.david.morgan@vtuk.com	daveglmorgan
<input type="checkbox"/>	Stacey Turvey	steve.turvey@vtuk.com	sturvey
<input type="checkbox"/>	Training Dave	david.morgan@iamproperty.com	Davidmorgan
<input type="checkbox"/>	Christian Bale	cbtest@vtuk.com	ChristianBale
<input type="checkbox"/>	Natalie Portman	nttest@vtuk.com	NataliePortman
<input type="checkbox"/>	Dan Carter	DC1@hotmail.co.uk	D Carter
<input type="checkbox"/>	Owen Farrell	OF12@hotmail.co.uk	O Farrell
<input type="checkbox"/>	Weekender One	Weekenderone@vtuk.com	Weekender one

At the bottom of the table, it shows '1 to 10 of 36' and 'Page 1 of 4'. On the right side, there are sections for 'Modules' (Client Portals, E-Sign, Reporting Dashboard, Sales, Accounts, Control Centre, Inspections, LetZone, Lettings, Property Management, SalesAutomation) and 'Roles' (Administrator, Negotiator, Property Manager).

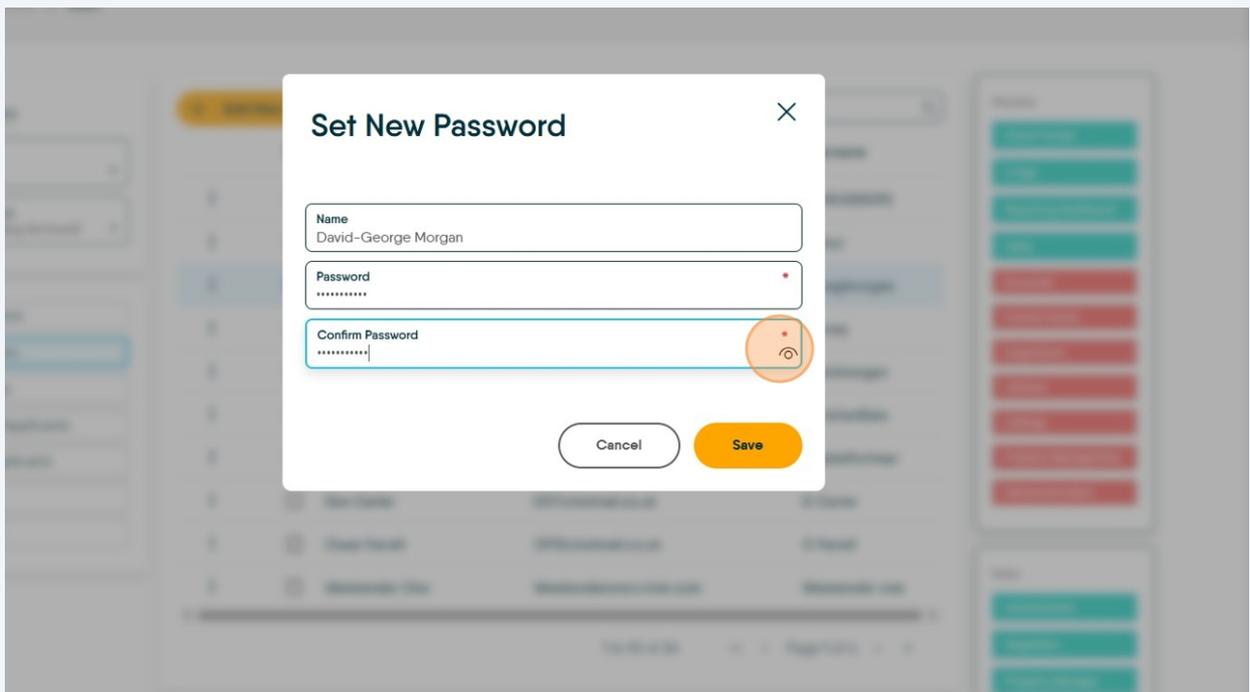
9 Click the "Password" field. Enter the new password.

The screenshot shows a 'Set New Password' dialog box. The 'Name' field contains 'David-George Morgan'. The 'Password' field is highlighted with an orange circle and contains the text 'Enter new password'. The 'Confirm Password' field contains 'Re-enter new password'. At the bottom, there are 'Cancel' and 'Save' buttons.

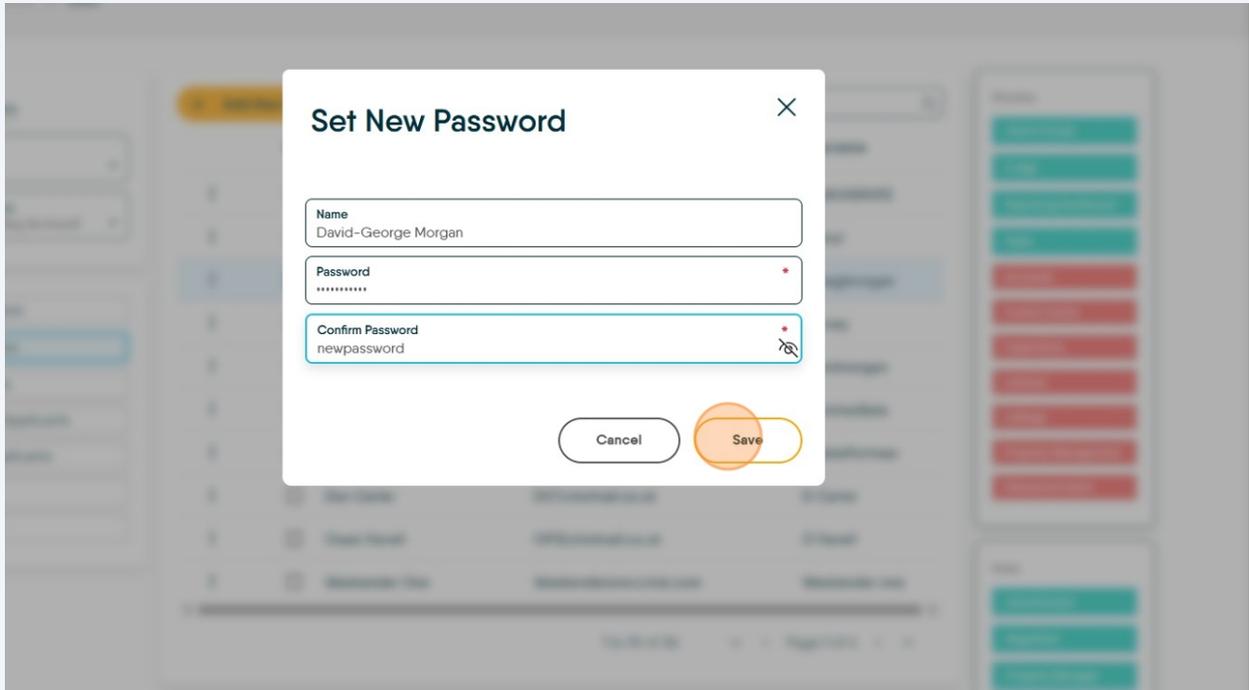
10 Click the "Confirm Password" field. Confirm the new password



11 Click there to view the password as typed.



12 Click "Save"



13 This will change the user password, however it will not notify the user the password has been changed or what the new password is.