

# Updating User Details in iamproperty CRM



This guide provides a step-by-step approach to updating Internal company user details in the iamproperty CRM, ensuring that Administrators can easily manage and maintain accurate information. To centrally update the details for a users requires access to Control Centre.

Users can update their own details in the 'Account Settings' menu.



Tip! Why is this important?

This information is important as the email and SMS templates created in CRM use this information to complete the tags that show as {user...}, for example {userforename} if the information is incomplete or wrong then these fields don't perform correctly.

1

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

The screenshot shows the 'MyDay' dashboard in the iamproperty CRM. At the top, there is a navigation bar with the iamproperty logo, menu items (My day, Lettings, Sales, Accounts, Reporting, Communications), and utility icons (grid, calendar, notifications, search, and a 'My account' profile button). The main heading is 'Welcome back, Training'. Below this, there 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' shows a calendar view with two entries: 'Test test' at 12:00 and 'Inspection (Property Inspection): 24 Westgarth Terrace, Darlington, DL1 2LA' at 13:55. 'My tasks' is a table with columns for Status, Name, Priority, Start date, and Due date. It lists four tasks: 'test' (High priority, due 27/Nov/2024), 'Call Landlord' (Medium priority, due 12/Dec/2024), 'Call back' (High priority, due 03/Jan/2025), and 'Make Tea' (High priority, due 07/Jan/2025).

Status	Name	Priority	Start date	Due date
Not Started	test	High	27/Nov/2024	27/Nov/2024
Not Started	Call Landlord	Medium	12/Dec/2024	12/Dec/2024
Not Started	Call back	High	03/Jan/2025	03/Jan/2025
Not Started	Make Tea	High	07/Jan/2025	07/Jan/2025

## 2 Click "My account"

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

Navigation: iamproperty CRM movebutler iamsold

My day Lettings Sales Accounts Reporting Communications

My account

# I come back, Training

id New Record View property management Visit help centre

Records

My events

Name
Test test
Inspection (Property Inspection): 24 Westgarth Terrace, Darlington, DL1 2LA

My tasks

Status	Name	Priority	Start date	Due date
Not Started	test	High	27/Nov/2024	27/Nov/2024
Not Started	Call Landlord	Medium	12/Dec/2024	12/Dec/2024
Not Started	Call back	High	03/Jan/2025	03/Jan/2025

## 3 Click "Control centre"

The screenshot shows the CRM dashboard with the 'Control centre' option highlighted in the user profile menu. The dashboard includes a search bar, a 'My tasks' table, and a 'My events' section.

Navigation: iamproperty CRM movebutler iamsold

My day Lettings Sales Accounts Reporting Communications

My account

# I come back, Training

id New Record View property management Visit help centre

Records

My events

Name
Test test
Inspection (Property Inspection): 24 Westgarth Terrace, Darlington, DL1 2LA

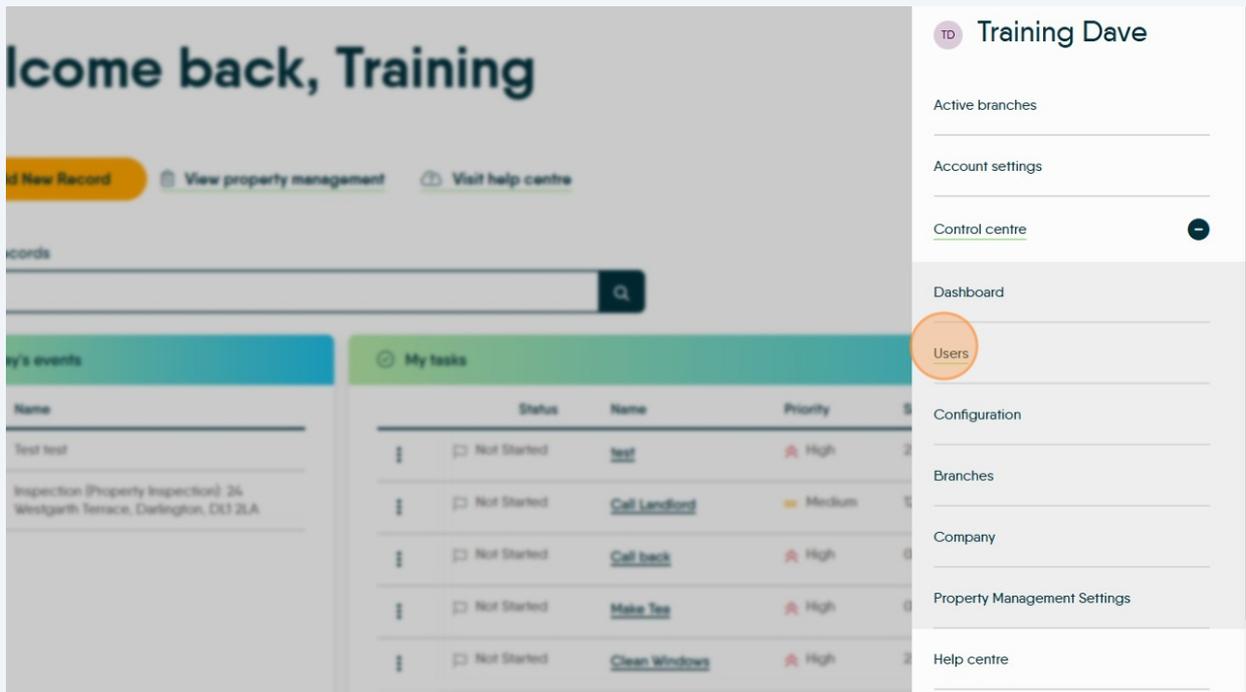
My tasks

Status	Name	Priority	Start date	Due date
Not Started	test	High	27/Nov/2024	27/Nov/2024
Not Started	Call Landlord	Medium	12/Dec/2024	12/Dec/2024
Not Started	Call back	High	03/Jan/2025	03/Jan/2025

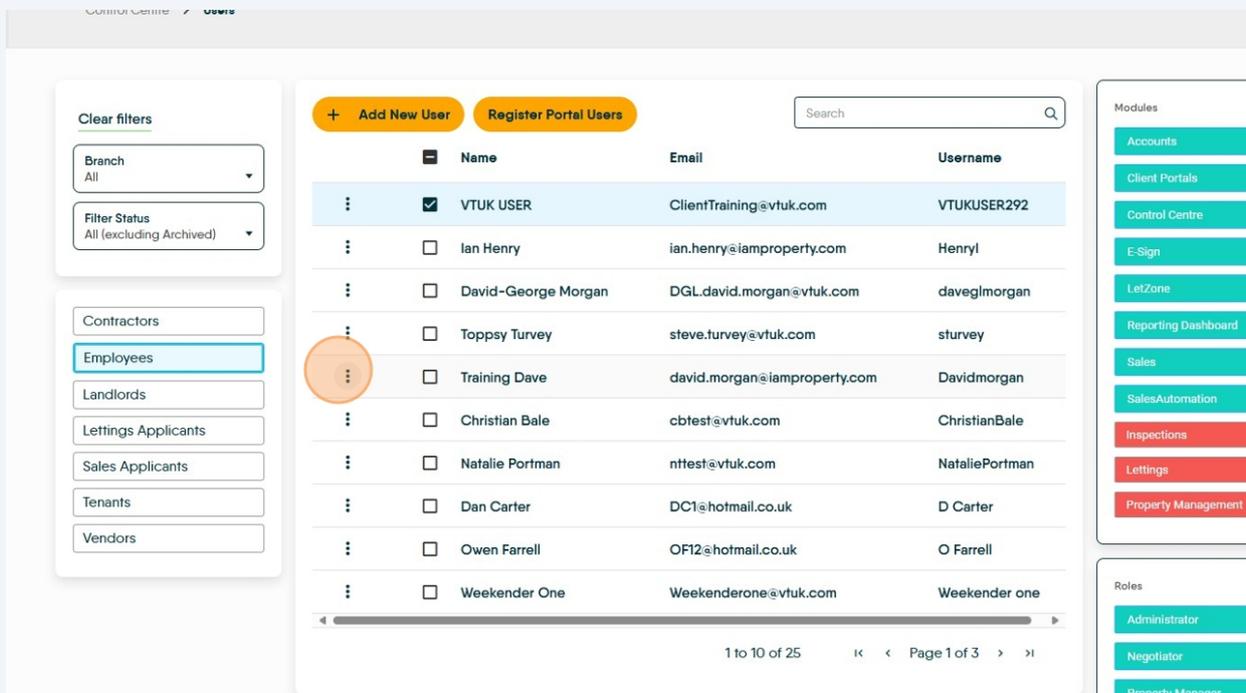
TD Training Dave

- Active branches
- Account settings
- Control centre
- Help centre
- Log out

#### 4 Click "Users"



#### 5 This will take you to the 'Users' section of the CRM and specifically the Employees section. Click here to open the menu..



## 6 Click "View/Edit User"

The screenshot shows a user management interface. On the left, there are filter options for Branch (All) and Filter Status (All (excluding Archived)). Below these are buttons for various 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. A 'View/Edit User' button is highlighted over the 'Training Dave' row. 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 type="checkbox"/>	David-George Morgan	DGL.david.morgan@vtuk.com	daveglmorgan
<input type="checkbox"/>	Toppsy Turvey	steve.turvey@vtuk.com	sturvey
<input checked="" 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 25' and 'Page 1 of 3'. On the right side, there are sections for 'Modules' (Accounts, Client Portals, Control Centre, E-Sign, Inspections, LetZone, Lettings, Property Management, Reporting Dashboard, Sales, SalesAutomation) and 'Roles' (Administrator, Negotiator, Property Manager).

7 From the 'Edit User' field you can update most of the screen options, *with the exception of Username* (this can be updated in the Users Account Settings) E.G. Click the "Email" field to update the email address .

The screenshot shows the 'Edit User' form. The form contains the following fields:

- Company: ovhomes.com
- Branch: Morgan & Co
- Username: Davidmorgan
- Email: david.morgan@iamproperty.com (highlighted)
- Title: Mr
- Forename: Training
- Surname: Dave
- Security Role: Select security role
- Mobile Phone: Enter mobile number
- Phone: 01865 860 873
- Work Phone: 01865 860 873
- Status: Active
- Job Title: Select job title

At the bottom of the form, there are 'Cancel' and 'Save' buttons.

8 Update all the empty fields

The screenshot shows the 'Edit User' form with the following fields and values:

Company ovhomes.com	Branch Morgan & Co
Username Davidmorgan	Email david.morgan@iamproperty.com
Title Mr	Forename Training
Surname Dave	Security Role Select security role
Mobile Phone Enter mobile number	Phone 01865 860 873
Work Phone 01865 860 873	Status Active
Job Title Select job title	

Buttons: Cancel, Save

9 Click "Select job title"

The screenshot shows the 'Edit User' form with the following fields and values:

Mobile Phone 07711223344	Phone 01865 860 873
Work Phone 01865 860 873	Status Active
Job Title Select job title	

Filter Branches: Morgan & Co, Morgan&Co MB, Reports & Letters

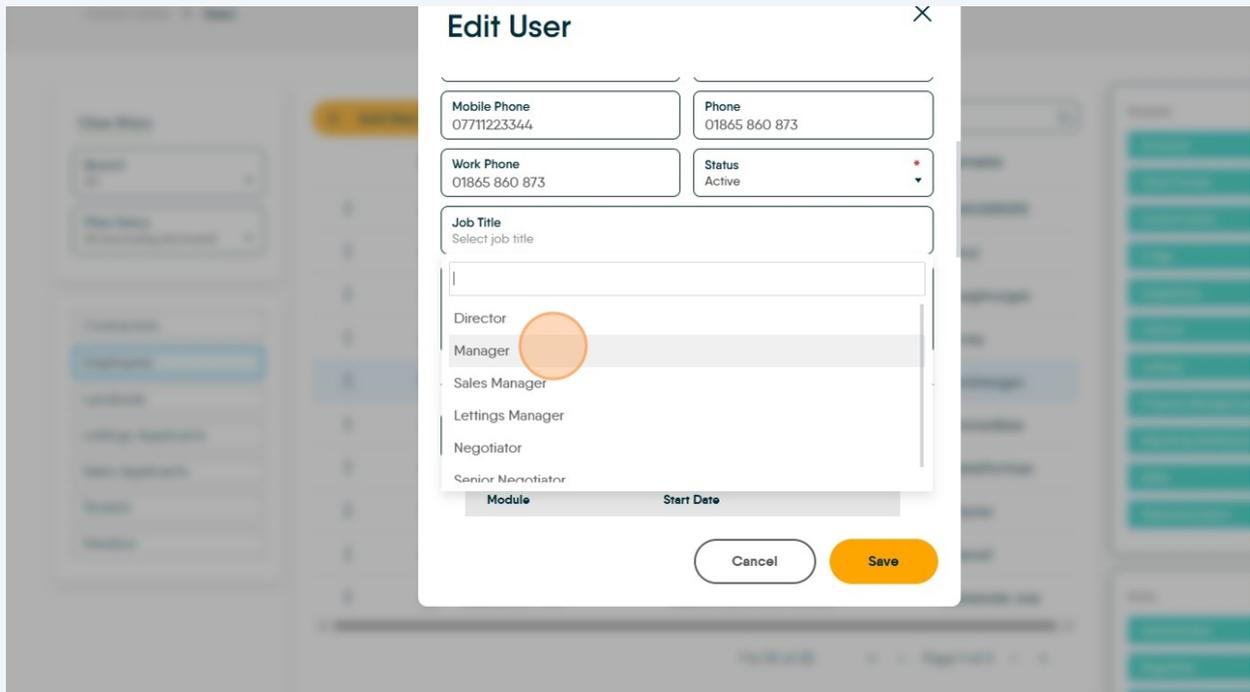
Module Access:

Module Control Centre	Start Date 22/05/2025	Add
--------------------------	--------------------------	-----

Buttons: Cancel, Save

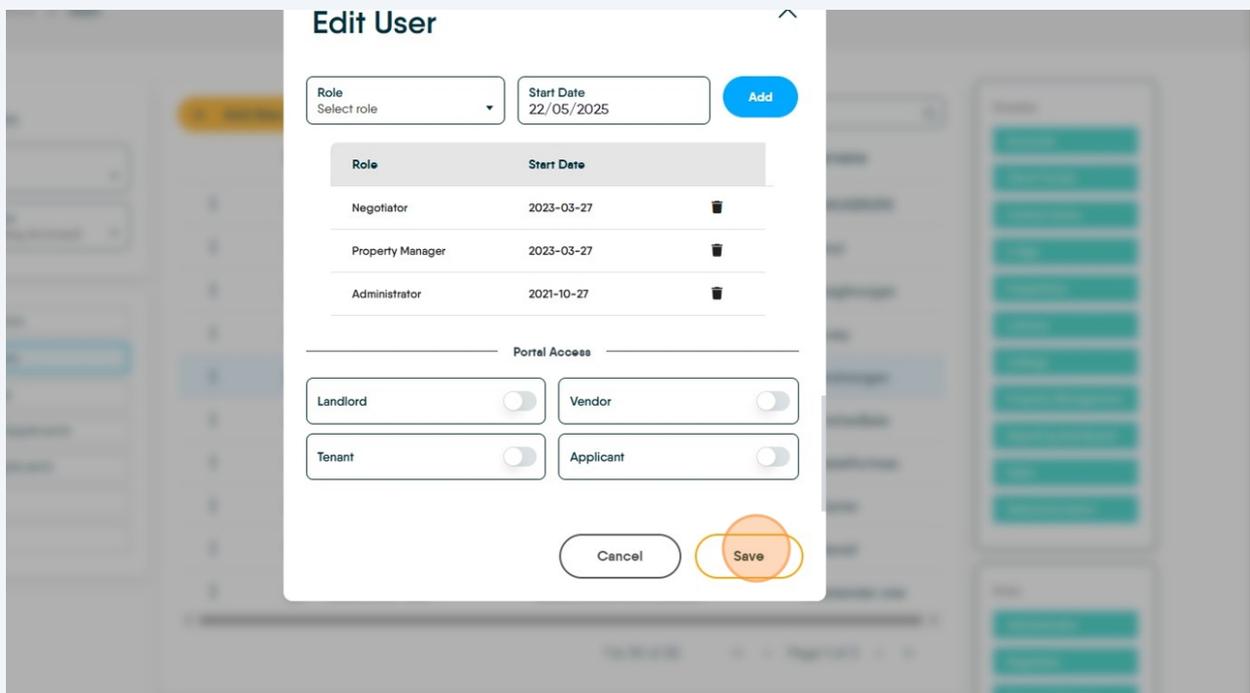
10

If new job types are required they can be added in Configuration using the Lookups option.



11

Once complete, scroll down the screen and click "Save"



## Account Settings

12

An individual User, without access to Control Center, can update their own personal information from the 'Account Settings' menu.

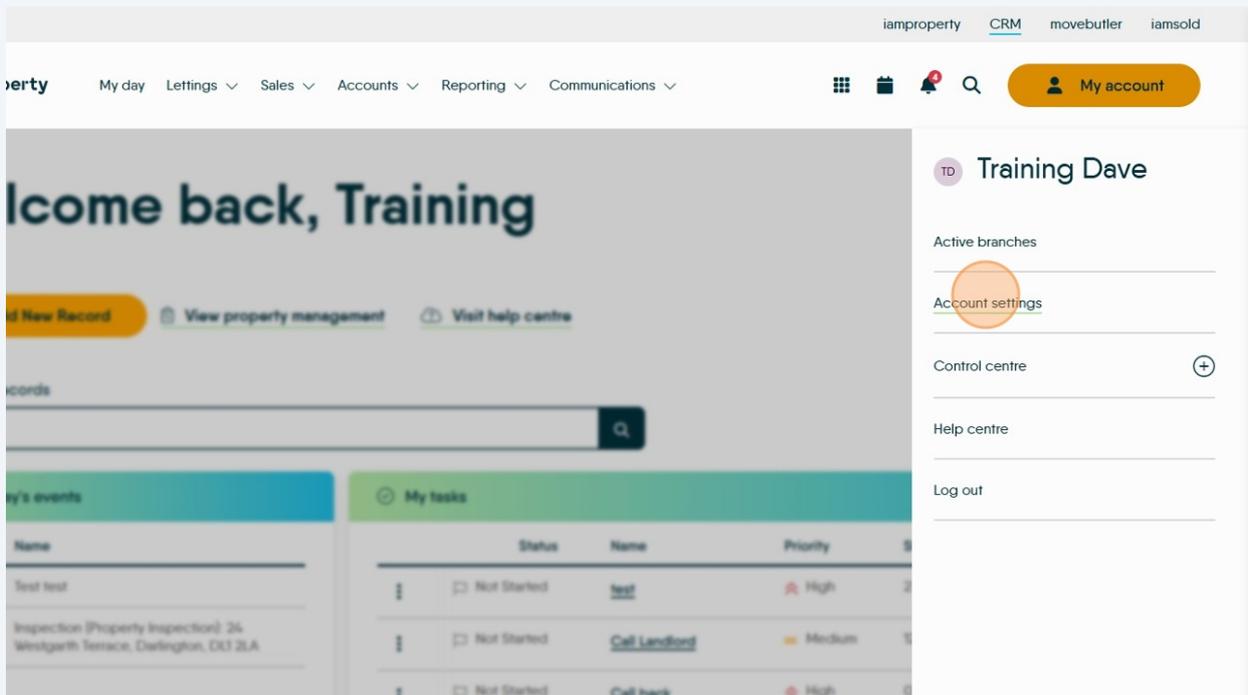
13

To update the 'Username'. Click "My account"

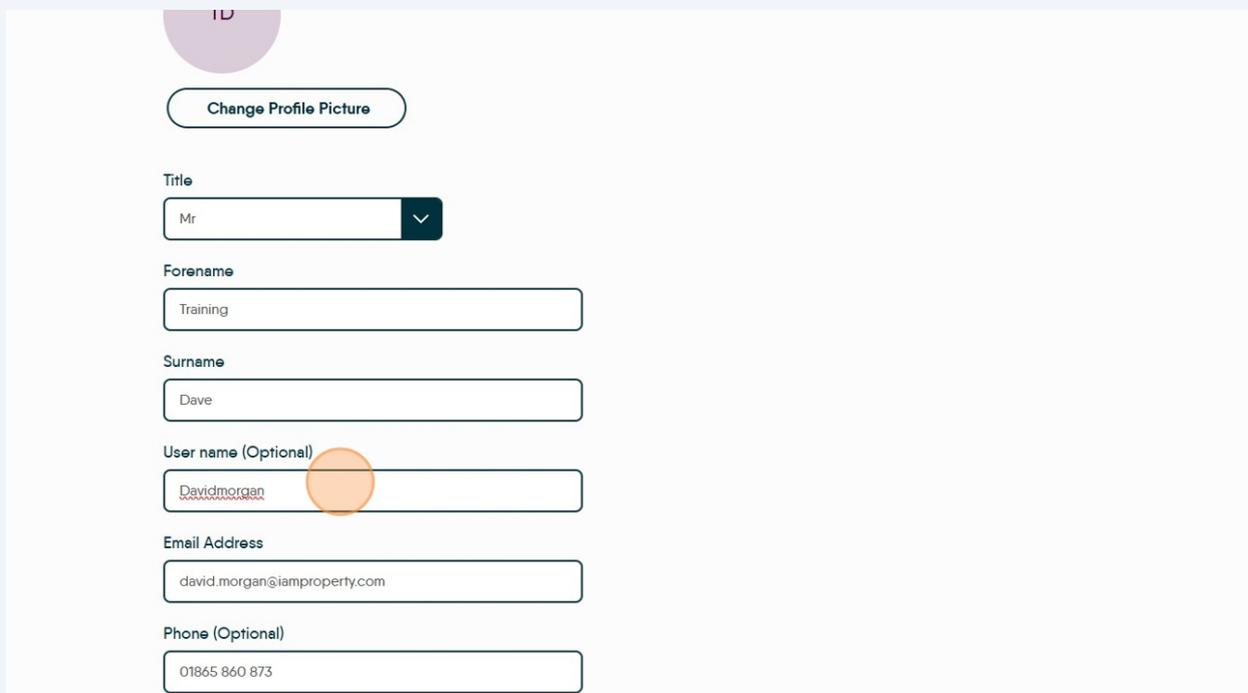
The screenshot shows a web application interface. At the top right, there are links for 'iamproperty', 'CRM', 'movebutler', and 'iamsold'. Below these, a navigation menu includes 'My day', 'Lettings', 'Sales', 'Accounts', 'Reporting', and 'Communications'. A 'My account' button is highlighted with a yellow circle. The main content area features a large heading 'I come back, Training' and three buttons: 'Add New Record', 'View property management', and 'Visit help centre'. Below this is a search bar with the text 'Records' and a search icon. The interface is divided into two main sections: 'My events' and 'My tasks'. The 'My tasks' section contains a table with the following data:

Status	Name	Priority	Start date	Due date
Not Started	test	High	27/Nov/2024	27/Nov/2024
Not Started	Call Landlord	Medium	12/Dec/2024	12/Dec/2024
Not Started	Call back	High	03/Jan/2025	03/Jan/2025

14 Click "Account settings"



15 Click the "User name" field and enter the new user name. Then click 'Save'.



**16**

The User can continue to update their personal business contact details in the other fields in the screen. Scroll to the bottom of the screen for a User to reset their password.