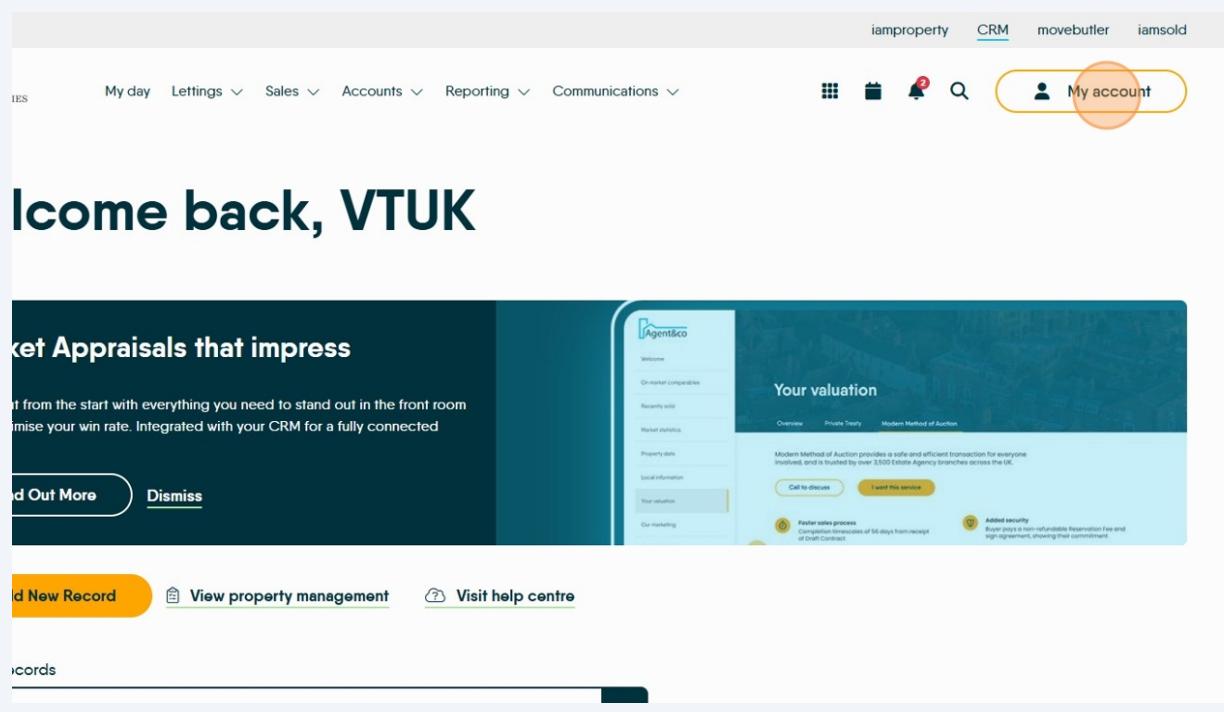


# Updating Property Management Access Settings in CRM



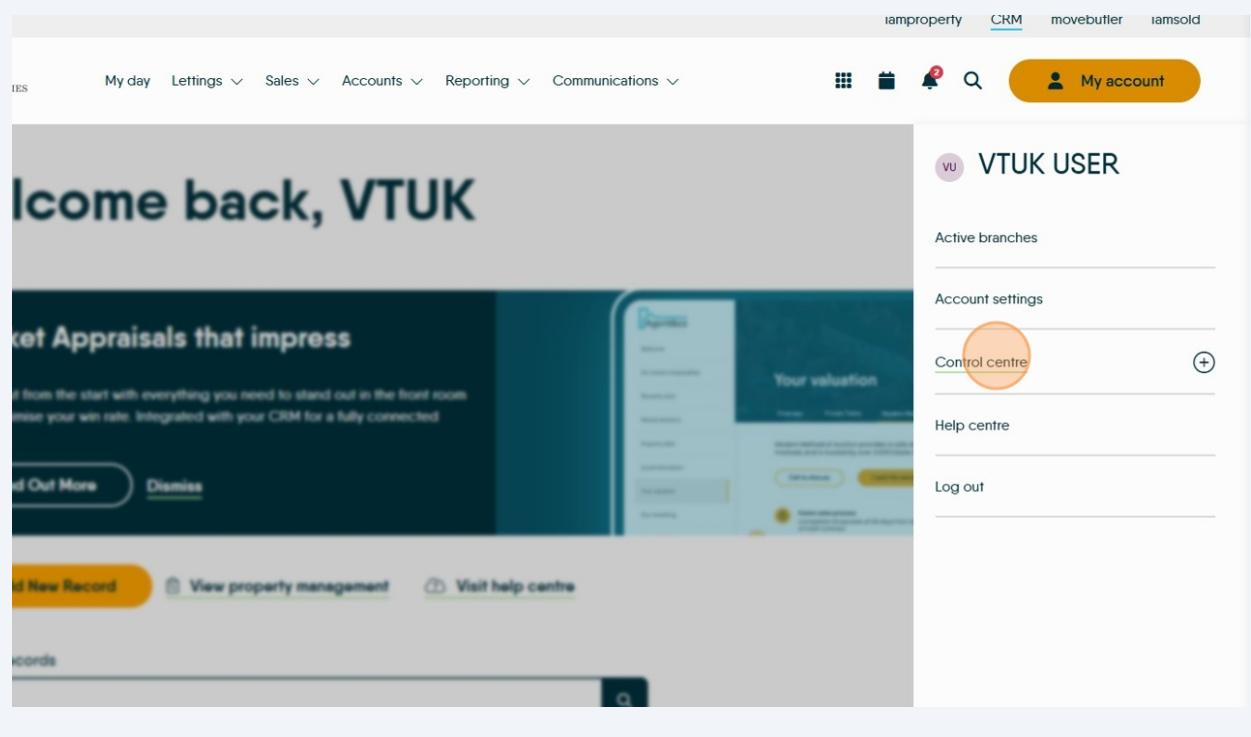
This guide provides essential steps for updating property management access settings in your CRM, ensuring that you can effectively manage permissions and streamline operations. By following the outlined process, you can enhance your team's efficiency and maintain better control over property management tasks. It's a valuable resource for anyone looking to optimize their CRM usage and improve collaboration within their organization.

## 1 Click "My Account"



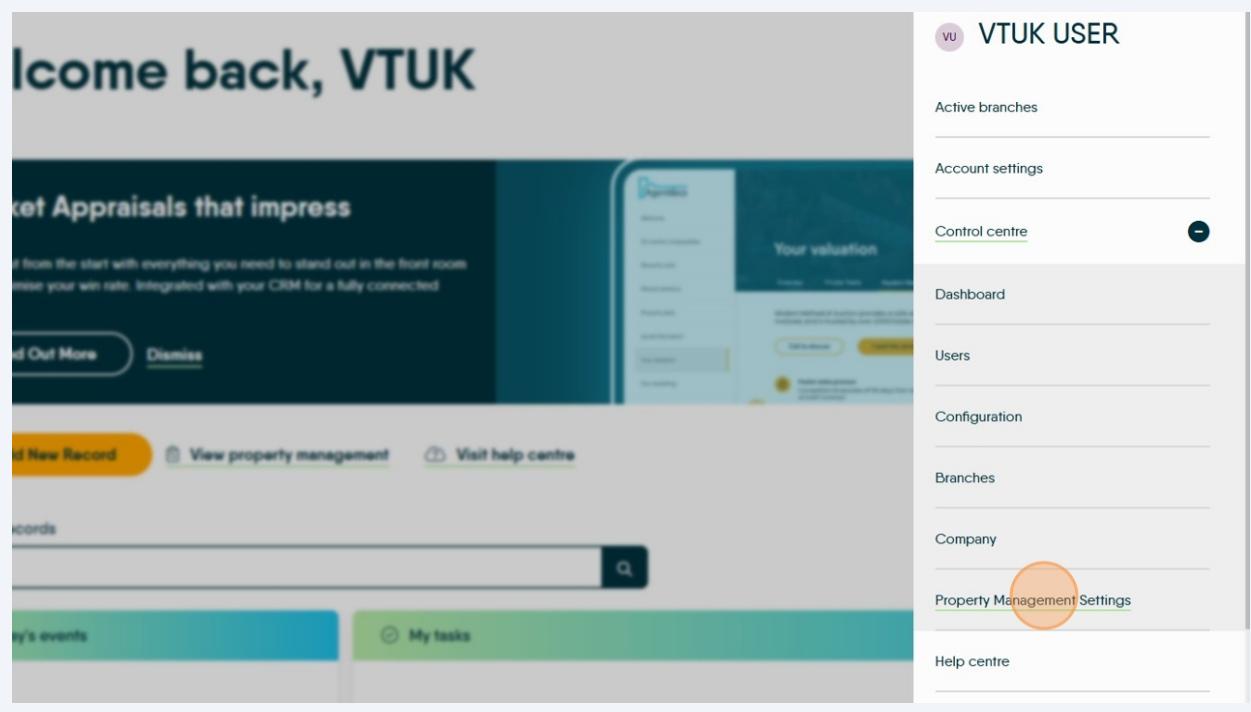
The screenshot shows the Agentico CRM homepage. At the top, there is a navigation bar with links for 'My day', 'Lettings', 'Sales', 'Accounts', 'Reporting', and 'Communications'. On the far right of the top bar are icons for 'iamproperty', 'CRM', 'movebutler', and 'iamsold'. Below the navigation bar, there is a search bar and a 'My account' button, which is highlighted with a yellow circle. The main content area features a dark banner with the text 'Get Appraisals that impress' and a subtext about starting with everything needed for front room success. Below this, there are buttons for 'Read Out More' and 'Dismiss'. To the right, there is a 'Your valuation' section with a 'Call to discuss' button and a 'Learn this service' button. At the bottom of the page, there are buttons for 'Add New Record', 'View property management', and 'Visit help centre'. The footer shows a progress bar with the text '1 records'.

## 2 Click "Control centre"



The screenshot shows the iamsold CRM interface. At the top, there are navigation links: My day, Lettings, Sales, Accounts, Reporting, and Communications. On the right, there are icons for CRM, movebutler, and iamsold, along with a 'My account' button. The main content area features a banner with the text 'Income back, VTUK' and 'Get Appraisals that impress'. Below the banner, there is a message about starting with everything needed for front room success and improving win rates. A 'Read More' button and a 'Dismiss' button are present. At the bottom, there are buttons for 'Add New Record', 'View property management', and 'Visit help centre'. On the right side, a sidebar for 'VTUK USER' shows a list of account settings: Active branches, Control centre (which is highlighted with an orange circle), Help centre, and Log out. The 'Control centre' item has a '+' sign next to it.

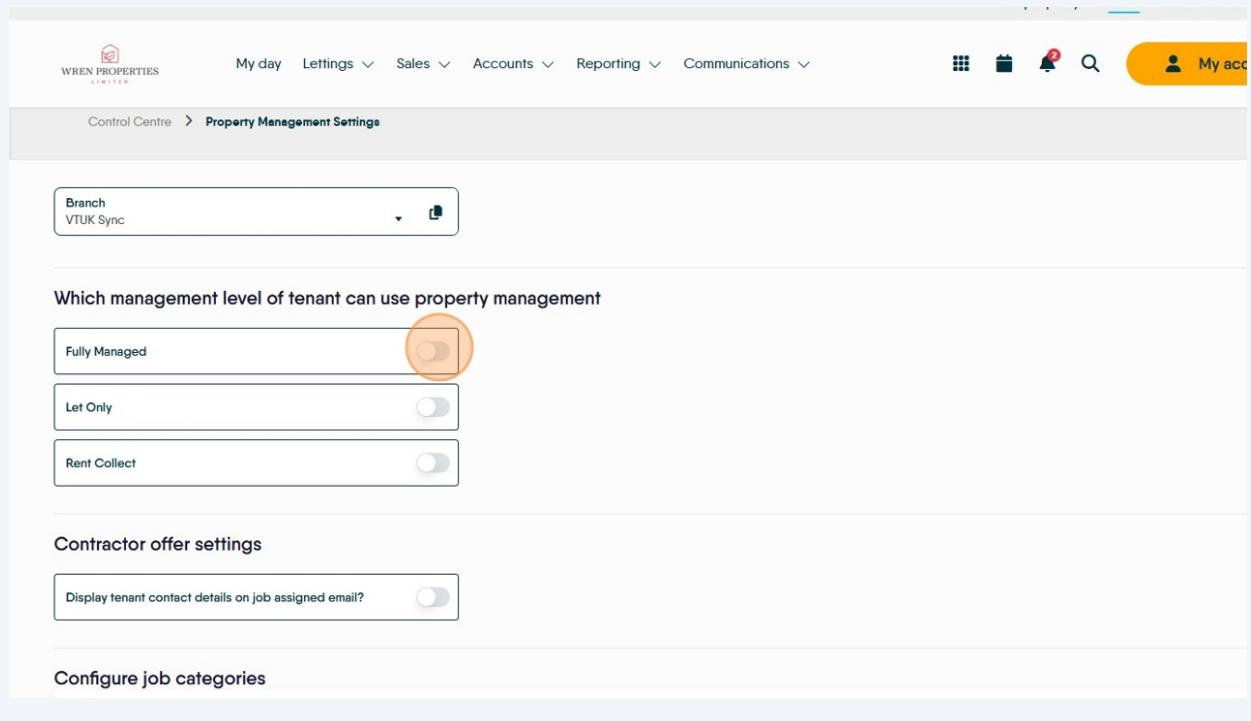
## 3 Click "Property Management Settings"



The screenshot shows the iamsold CRM interface, similar to the previous one but with a different sidebar navigation. The sidebar for 'VTUK USER' includes: Active branches, Control centre (which is highlighted with a minus sign), Dashboard, Users, Configuration, Branches, Company, Property Management Settings (which is highlighted with an orange circle), and Help centre.

4

Click here to change the access setting for Tenants to be able to report their own maintenance. As it shows below, no tenant could use the reporting portal. Toggle will be black when allowed.



WREN PROPERTIES LIMITED

My day Lettings Sales Accounts Reporting Communications

Control Centre > **Property Management Settings**

Branch: VTUK Sync

Which management level of tenant can use property management

- Fully Managed
- Let Only
- Rent Collect

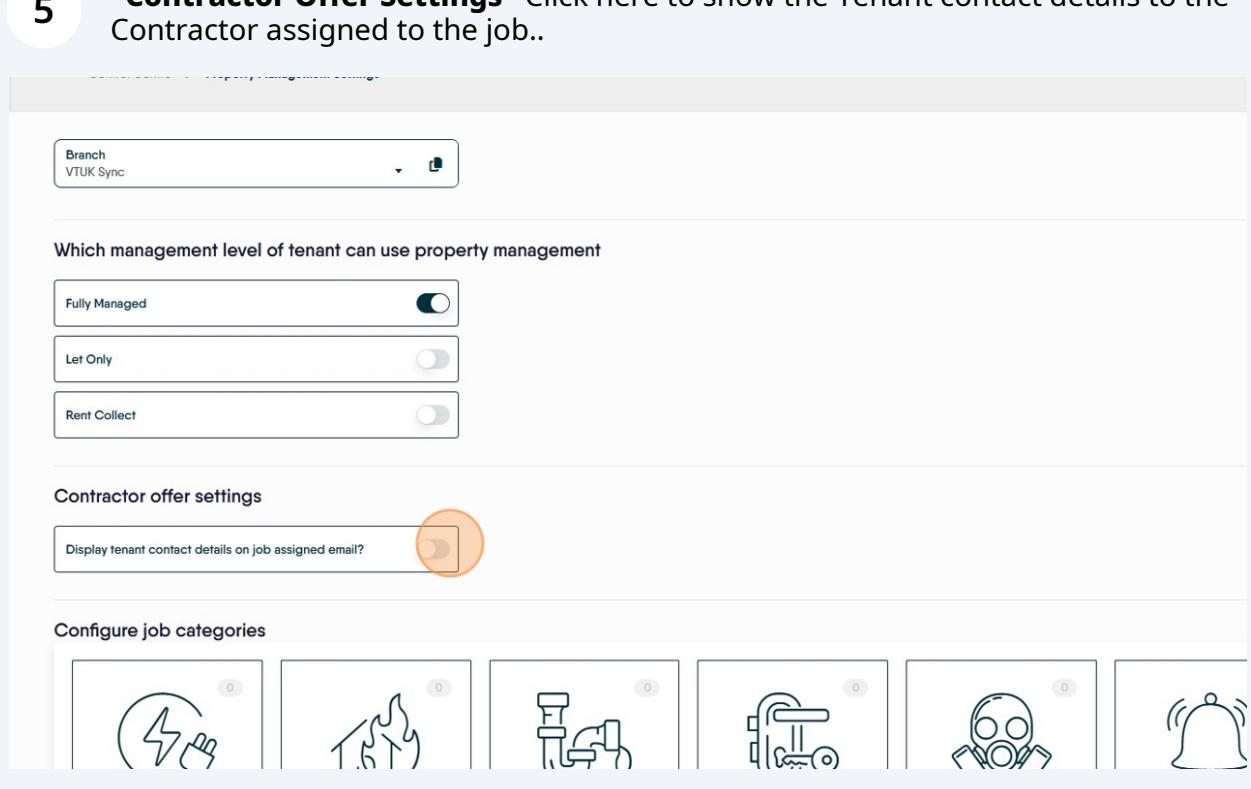
Contractor offer settings

Display tenant contact details on job assigned email?

Configure job categories

5

**"Contractor Offer Settings"** Click here to show the Tenant contact details to the Contractor assigned to the job..



Branch: VTUK Sync

Which management level of tenant can use property management

- Fully Managed
- Let Only
- Rent Collect

Contractor offer settings

Display tenant contact details on job assigned email?

Configure job categories

Icons for job categories: Lightning bolt, Flame, Pipe, Lock, Gas mask, Bell.

6

Click here to "Save"

agent level of tenant can use property management

offer settings

contact details on job assigned email?

job categories