

Managing User Accounts and Settings in iamproperty CRM



Learn how to navigate the Control Centre to update user details, modify security roles, and reset passwords for your team. This guide simplifies the process of managing system access and user permissions effectively.

1

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

iampropertyCRMmovebutleriamsold

property

My dayLettingsSalesAccountsReportingCommunications

My account

I come back, Training

New Record

View property management

Visit help centre

Records

My events

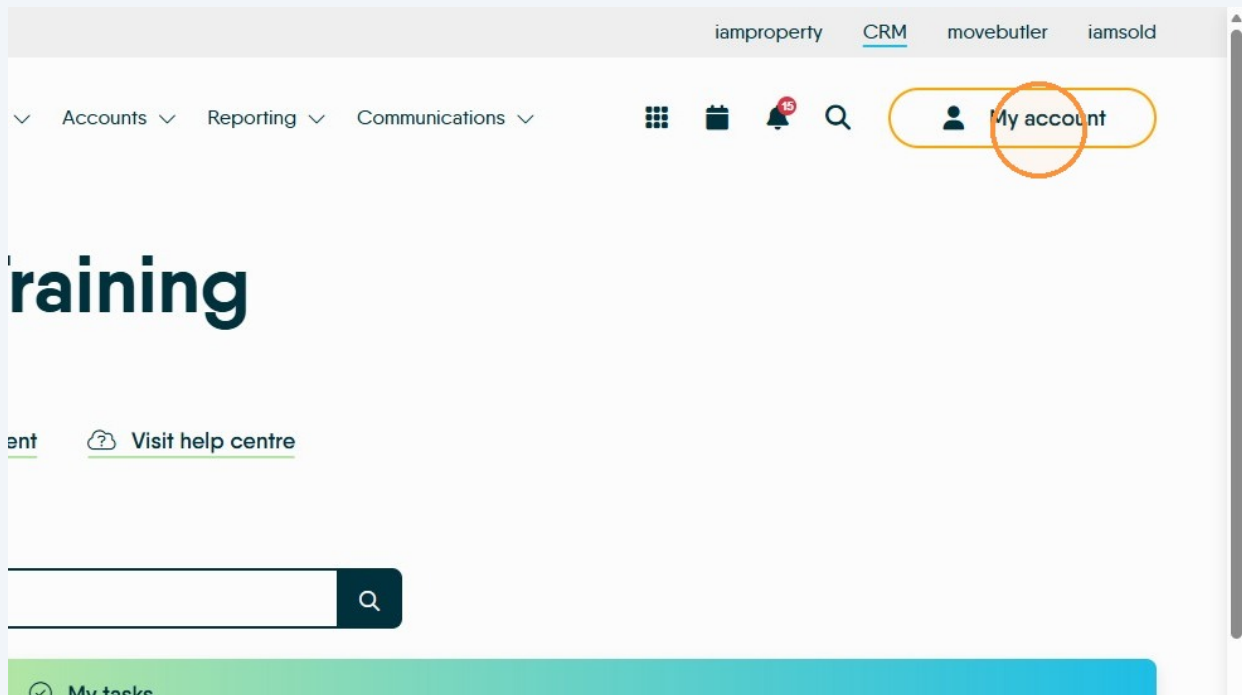
Name
Jemmas 8-4.30
Test test

My tasks

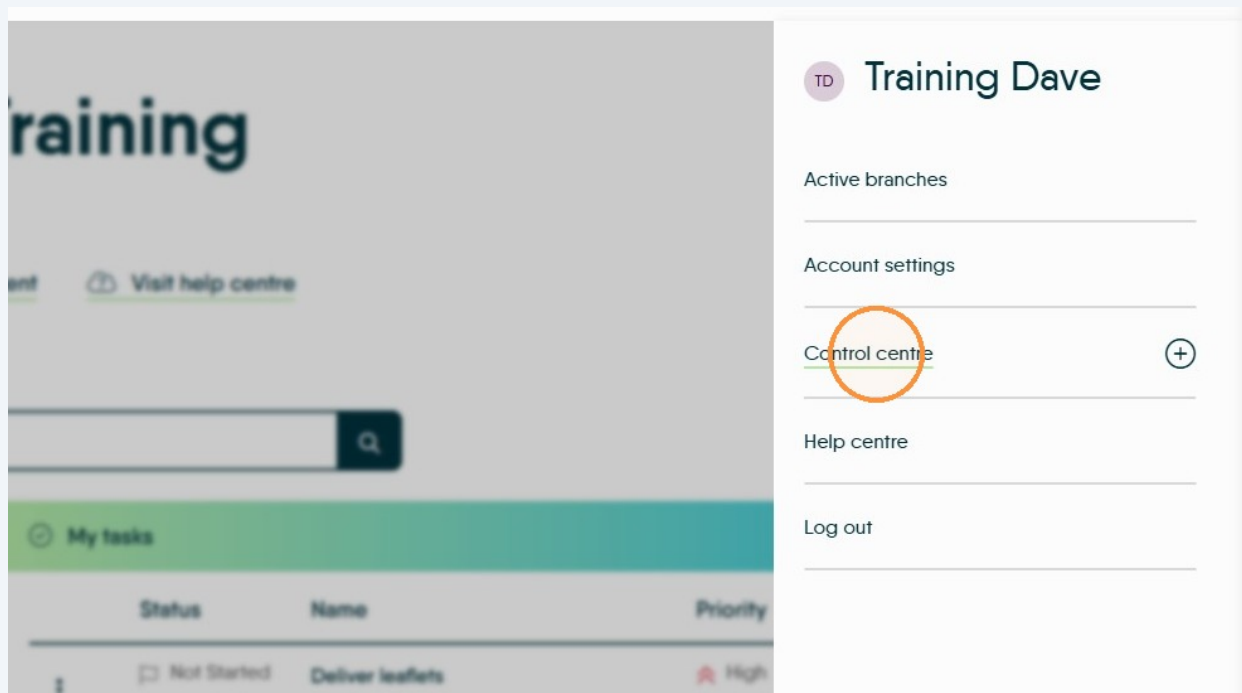
Status	Name	Priority	Start date	Due date
Not Started	Deliver leaflets	High	30/Jan/2026	07/Feb/2026
Not Started	deliver leaflets	High	06/Feb/2026	08/Feb/2026

Open User Management

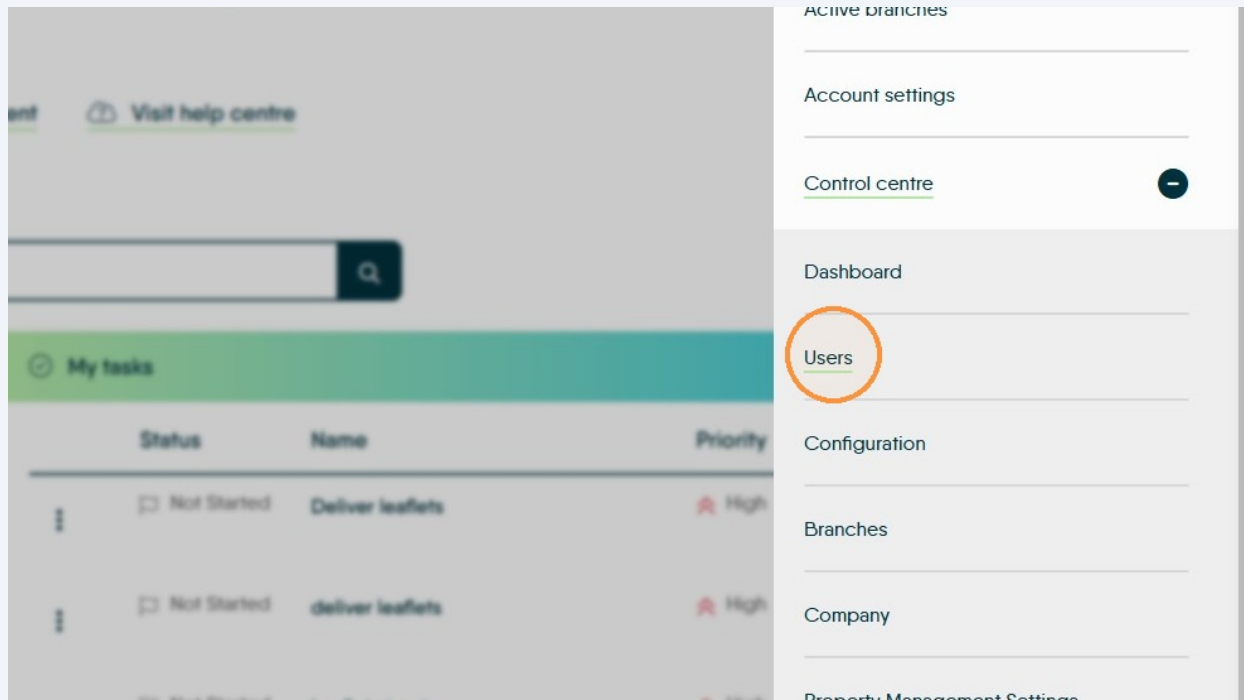
2 Click **"My account"**



3 Click **"Control centre"**



4 Click "Users"



Select Users

- 5 Select the checkbox for the user you wish to edit, make sure only one user is selected.
The modules in the right side of the screen will be those enabled for that user, green is active, red is inactive.

+ Add New User

Register Portal Users

Search

Q

	Name	Email	Username
⋮	☒ VTUK USER	ClientTraining@vtuk.com	VTUKUSER292
⋮	☐ David-George Morgan	DGL.david.morgan@vtuk.com	daveglmorgan
⋮	☐ Training Dave	david.morgan@iamproperty.com	Davidmorgan
⋮	☐ Christian Bale	cbtest@vtuk.com	ChristianBale
⋮	☐ Natalie Portman	nttest@vtuk.com	NataliePortman
⋮	☐ Dan Carter	DC1@hotmail.co.uk	D Carter
⋮	☐ Owen Farrell	OF12@hotmail.co.uk	O Farrell
⋮	☐ Weekender One	Weekenderone@vtuk.com	Weekender one
⋮	☐ David Wilton	David.wilton@iamproperty.com	DavidWilton7845
⋮	☐ James Morgan	james@morgan.tc	jamesmorgan

Modules

Accounts

Auction Triggers

Client Portals

Control Centre

E-Sign

Inspections

LetZone

Lettings

Property Management

Reporting Dashboard

Sales

SalesAutomation

Roles

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⋮	☒ Christian Bale	cbtest@vtuk.com	ChristianBale
⋮	☐ Natalie Portman	nttest@vtuk.com	NataliePortman
⋮	☐ Dan Carter	DC1@hotmail.co.uk	D Carter
⋮	☐ Owen Farrell	OF12@hotmail.co.uk	O Farrell
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Modules

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For example. Click **"Sales"** and the sales option will show red in the list and that user will not have access to that feature.

entre > Users

+ Add New User

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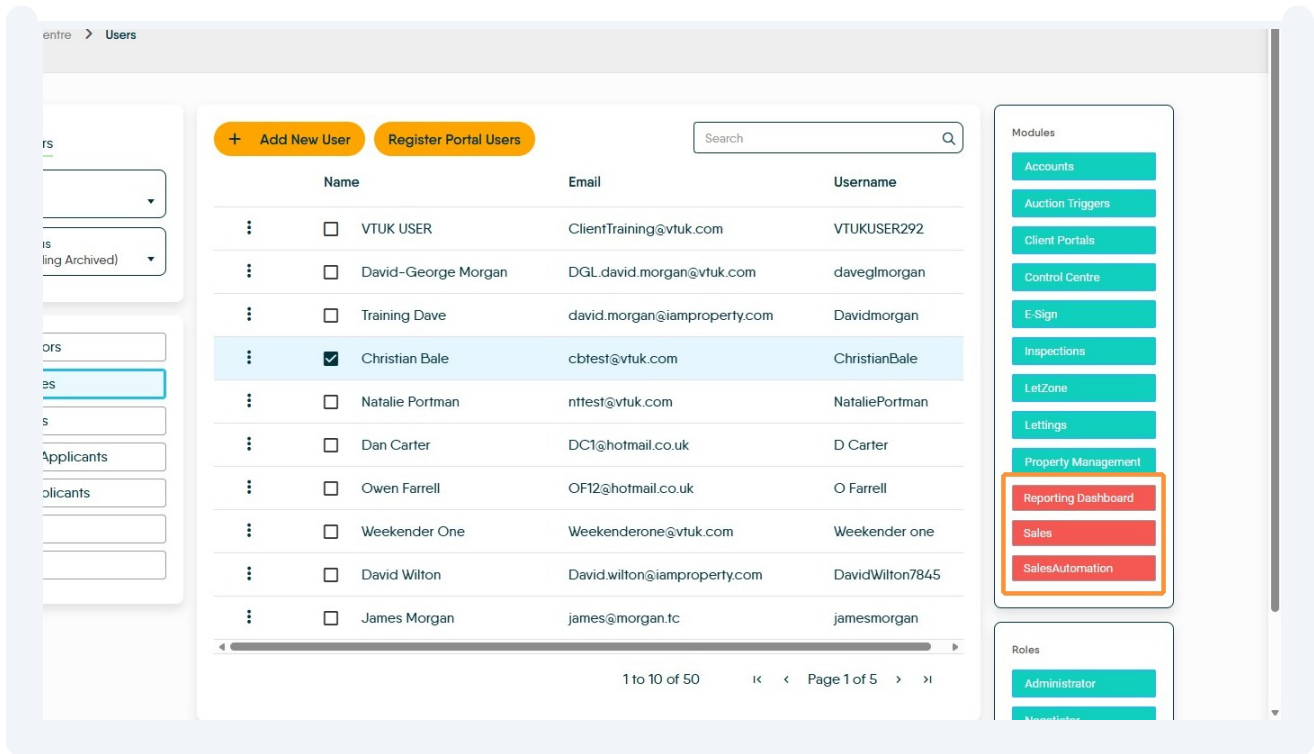
Sales

Reporting Dashboard

SalesAutomation

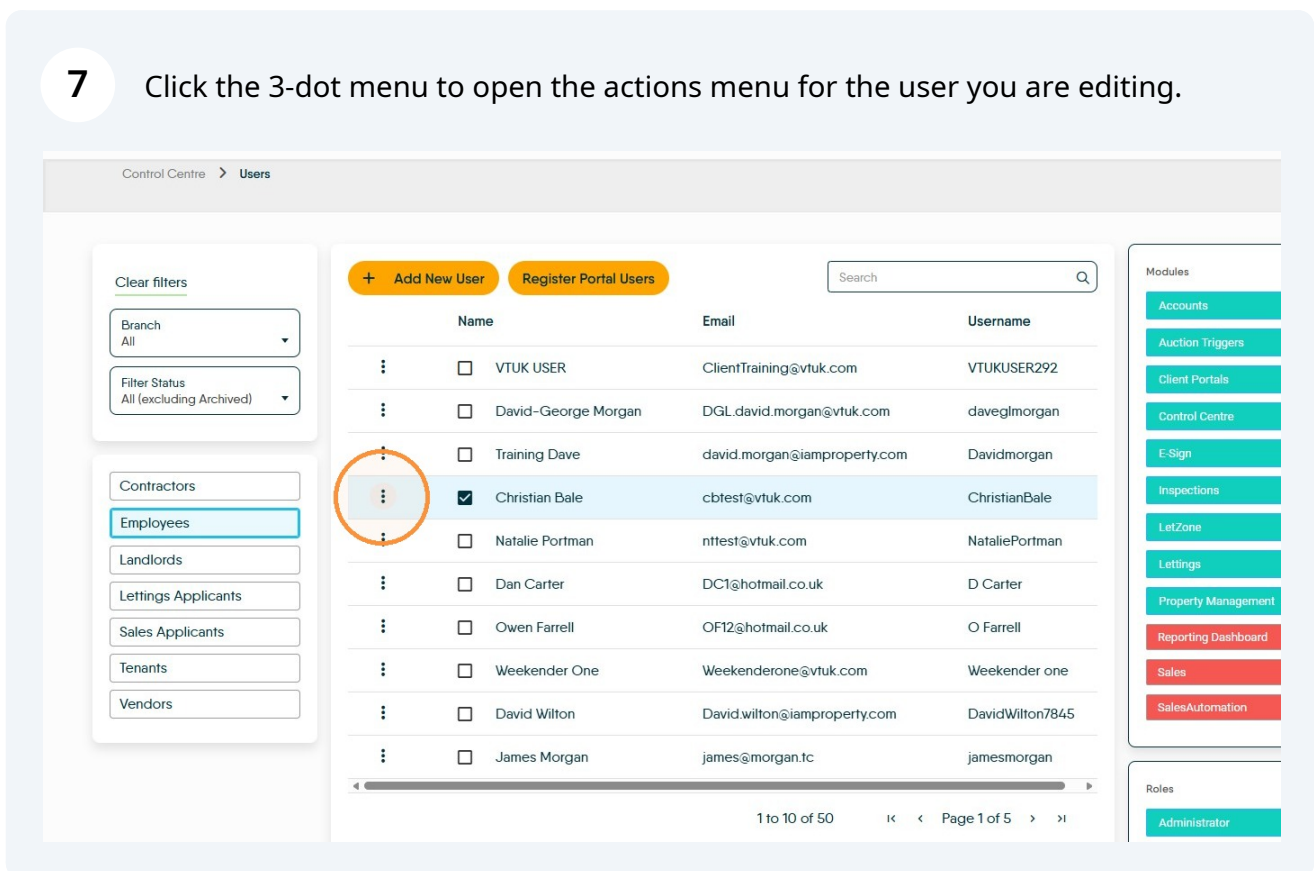
Roles

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Manage User Access

- Click the 3-dot menu to open the actions menu for the user you are editing.



8

Click **"Set Password"** to update their password.
Click the "Password" field.

Control Centre > Users

Clear filters

Branch
All

Filter Status
All (excluding Archived)

Contractors

Employees

Landlords

Lettings Applicants

Sales Applicants

Tenants

Vendors

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Modules

- Accounts
- Auction Triggers
- Client Portals
- Control Centre
- E-Sign
- Inspections
- LetZone
- Lettings
- Property Management
- Reporting Dashboard
- Sales
- SalesAutomation

Roles

- Administrator
- Needlefish

Set New Password

Name
Christian Bale

Password
Enter new password

Confirm Password
Re-enter new password

Cancel Save

Edit User Details

9 Click "View/Edit User"

Control Centre > Users

Clear filters

Branch
All

Filter Status
All (excluding Archived)

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Administrator

Non-Admin

View/Edit User

10

There are a number of options. **'Status'** will allow you to remove a user, by selecting 'Archived' from the list.

To give users default access to certain branches, in the **'Filter branches'** screen select the branches from your company list.

Edit User

Company: ovhomes.com

Branch: Swindon

Username: ChristianBale

Email: cbtest@vtuk.com

Title: Select title

Forename: Christian

Surname: Bale

Security Role: Select security role

Mobile Phone: Enter mobile number

Phone: Enter phone number

Work Phone: Enter work number

Status: Created

Job Title: Manager

Cancel Save

Edit User [Close]

Job Title
Manager

Filter Branches
Swindon X

Module Access

Module: Control Centre Start Date: 14/08/2026 [Add]

Module	Start Date	
Control Centre	2024-12-16	[Delete]
Lettings	2024-12-16	[Delete]
Property Management	2023-03-28	[Delete]

[Cancel] [Save]

11 Click "Cancel Save"

Edit User [Close]

Role: Select role Start Date: 14/08/2026 [Add]

Role	Start Date	
Negotiator	2023-03-28	[Delete]
Property Manager	2023-03-28	[Delete]
Administrator	2021-10-27	[Delete]

Portal Access

Landlord [Toggle] Vendor [Toggle]

Tenant [Toggle] Applicant [Toggle]

[Cancel] [Save]