

Deleting a User or Editing Account Information



Learn how to access your user management dashboard to review and modify account settings. This guide provides simple instructions for navigating to your user list and managing account status effectively.



Alert! In this guide we are assuming that we are removing Employees, however the process is very similar for other records in this list.

1

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

My day

Lettings

Sales

Accounts

Reporting

Communications

My account

Welcome back, Training

+ Add New Record

View property management

Visit help centre

Search all records

Today's events

Time	Name
08:00	Jemmas 8-4.30
12:00	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
⋮	Not Started	Leaflet streets	High	06/Feb/2026	06/Feb/2026

Account Navigation

2 Click "My account"

The screenshot shows the iamproperty CRM dashboard. The top navigation bar includes links for iamproperty, CRM, movebutler, and iamsold. Below this, a secondary navigation bar contains 'My day', 'Lettings', 'Sales', 'Accounts', 'Reporting', and 'Communications'. On the right side of this bar, there are icons for a grid, calendar, notifications, and search. The 'My account' button, featuring a user icon, is circled in orange. The main content area displays a welcome message 'I come back, Training' and a 'Add New Record' button. Below these are links for 'View property management' and 'Visit help centre'. A search bar is present, and the page is divided into two main sections: 'My events' and 'My tasks'.

Name
Jemmas 8-4.30
Test test

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

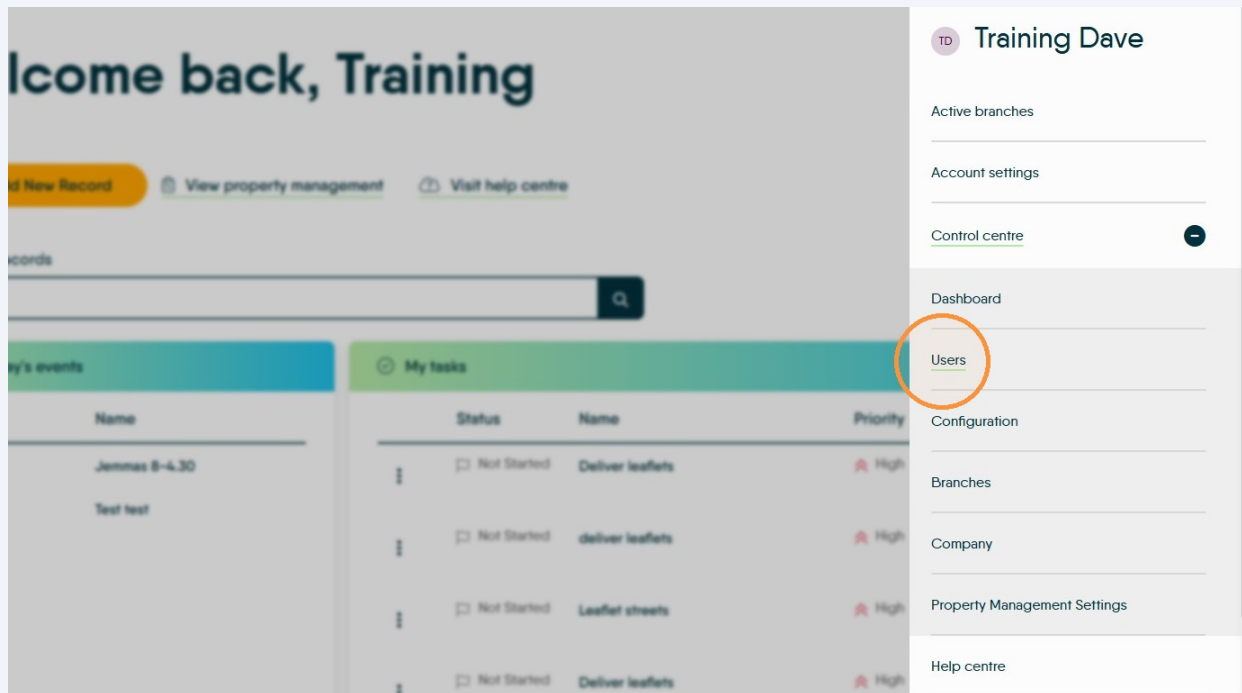
3 Click "Control centre"

This screenshot shows the same iamproperty CRM dashboard as the previous one, but with the 'My account' button clicked. A user profile menu is now visible on the right side of the screen. The menu is for 'Training Dave' and includes options for 'Active branches', 'Account settings', 'Control centre' (which is circled in orange), 'Help centre', and 'Log out'. The background content of the dashboard is slightly faded.

Name
Jemmas 8-4.30
Test test

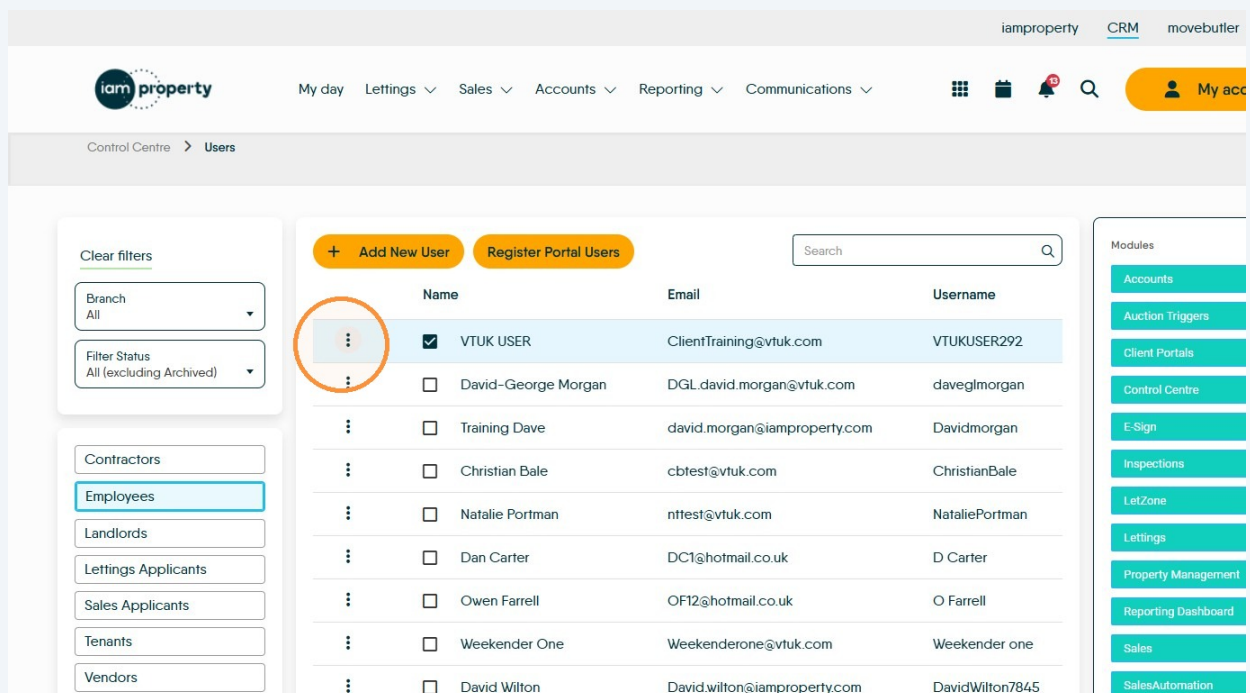
Status	Name	Priority
Not Started	Deliver leaflets	High
Not Started	deliver leaflets	High

4 Click "Users"



User Management

5 Open the **actions (3 dot) menu** for the selected user.



6 Click "Set Password" and change the Users password to restrict access to CRM.

The screenshot shows the 'iamproperty' Users management interface. On the left, there are filter options for Branch (All) and Filter Status (All (excluding Archived)). Below these are buttons for Contractors, Employees (selected), Landlords, Lettings Applicants, Sales Applicants, Tenants, and Vendors. The main area displays a table of users with columns for Name, Email, and Username. The first user, 'VTUK USER', is selected. A context menu is open over this user, with the 'Set Password' option circled in orange. The table lists several other users, including David-George Morgan, Training Dave, Christian Bale, Natalie Portman, Dan Carter, Owen Farrell, Weekender One, and David Wilton. On the right, there is a 'Modules' sidebar with buttons for Accounts, Auction Triggers, Client Portals, Control Centre, E-Sign, Inspections, LetZone, Lettings, Property Management, Reporting Dashboard, Sales, and SalesAutomation.

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

7 Then click "View/Edit User"

This screenshot is identical to the one above, showing the 'iamproperty' Users management interface. The 'Set Password' option in the context menu for the 'VTUK USER' is circled in orange. The table of users and the sidebar modules are the same as in the previous screenshot.

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

User Status

8 Set the user **status** to **Archived**

Edit User

Company
ovhomes.com

Branch
Morgan & Co

Username
VTUKUSER292

Email
ClientTraining@vtuk.com

Title

Forename
VTUK

Surname
USER

Security Role
Select security role

Mobile Phone
Enter mobile number

Phone
Enter phone number

Work Phone
Enter work number

Status
Created

Job Title
Select job title

Cancel

Save

Edit User

Company
ovhomes.com

Branch
Morgan & Co

Username
VTUKUSER292

Email
ClientTraining@vtuk.com

Title

Forename
VTUK

Surname
USER

Security Role
Select security role

Mobile Phone
Enter mobile number

Phone
Enter phone number

Work Phone
Enter work number

Status
Created

Job Title
Select job title

Created

Pending

Active

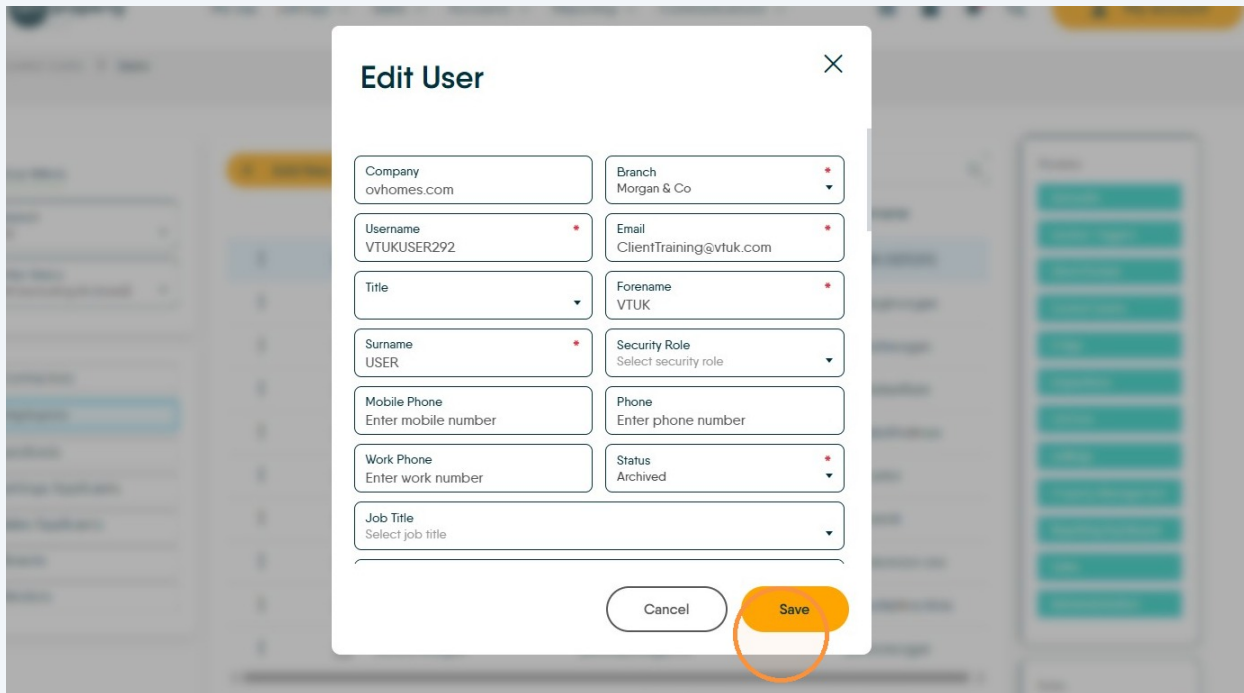
Inactive

Archived

9

Click Save

The user will now be removed from the 'Employees' list in the Users menu.



The screenshot shows a modal window titled "Edit User" with a close button (X) in the top right corner. The form contains the following fields:

Company ovhomes.com	Branch Morgan & Co
Username VTUKUSER292	Email ClientTraining@vtuk.com
Title	Forename VTUK
Surname USER	Security Role Select security role
Mobile Phone Enter mobile number	Phone Enter phone number
Work Phone Enter work number	Status Archived
Job Title Select job title	

At the bottom of the form are two buttons: "Cancel" and "Save". The "Save" button is highlighted with an orange circle.