

HeroPM-When an Owner Email Address Changes

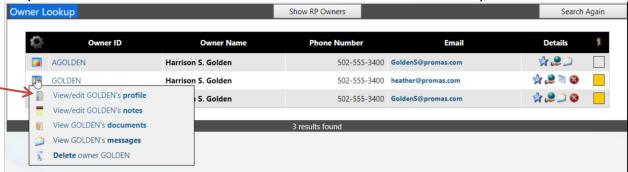
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Overview

An owner's email address becomes his Username when he creates a PROMAS Central account. The email address username cannot be changed in the system, so if the owner has a new email address and their old email account is inaccessible, it is best for your owner to create a new logon account. Password reminders are sent to the email address username, so it's important that the email address that is used as the account username is accessible.

Here are directions to update the owner's email address, and create a new account:

Update the owner's email address in their HeroPM Control Panel profile.



(Note: PROMAS Users should update the email in PROMAS and complete a sync.)

• Send a new welcome letter to the client by clicking on the envelope. This will include the information for establishing their new account and linking their profile.



• The client can then create a new logon with their new email address, and link it to their profile so they have access to their information/statements etc.

If the client still has access to their old email account, we would suggest that they delete their old logon account, once they've established their new one. They can delete it by logging on to their old account, and clicking the Delete button.