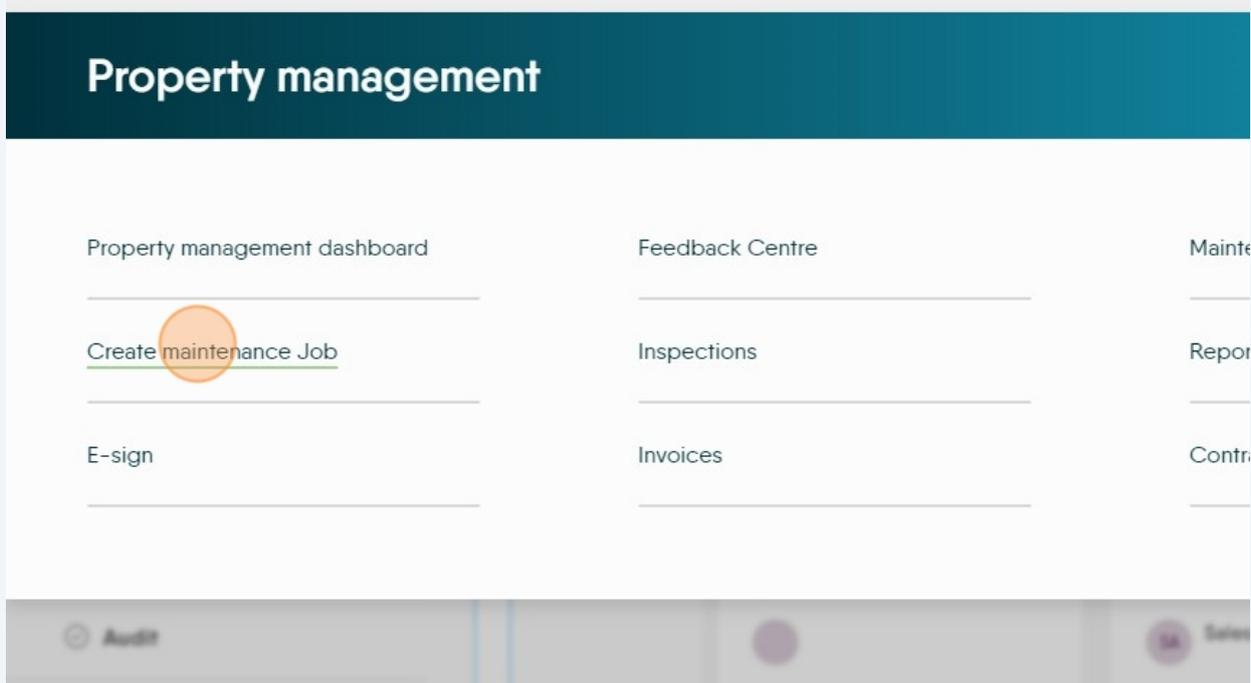# Creating a Maintenance Job and Assigning it to a Contractor
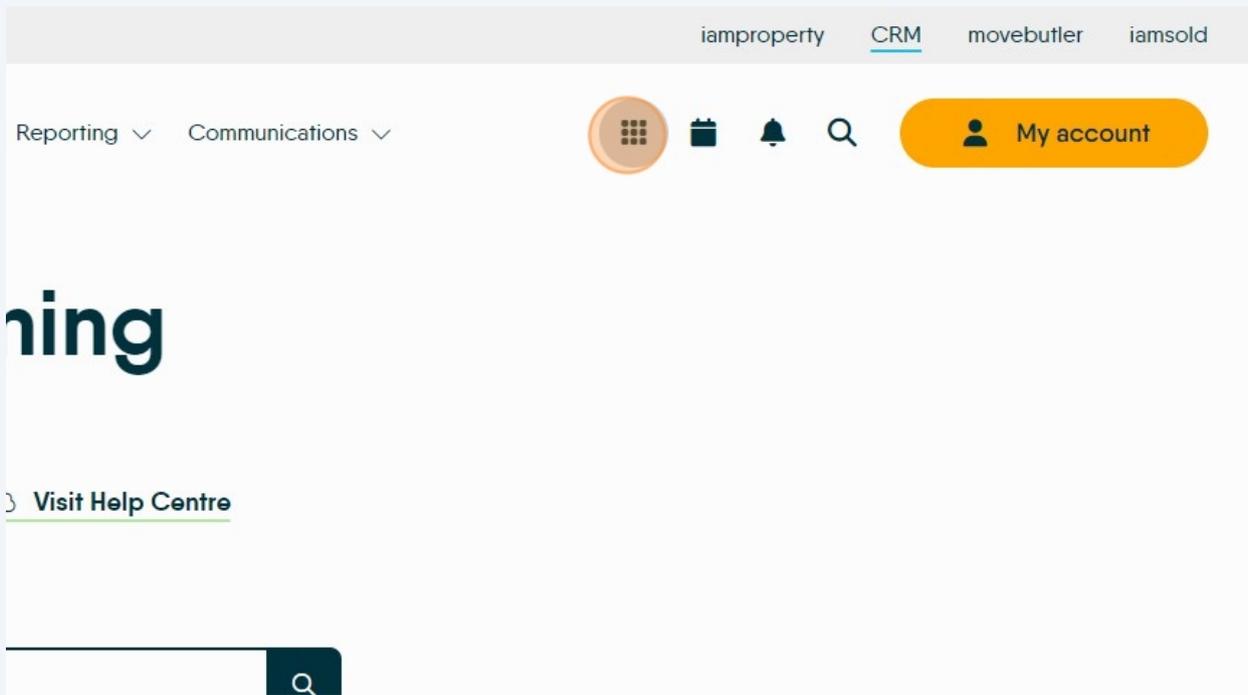
iam property

This guide provides a comprehensive overview of how to efficiently create and assign maintenance jobs to contractors within CRM Property Management module. It outlines multiple methods for job creation, ensuring users can choose the approach that best suits their needs. Additionally, it emphasises the importance of documenting details and communication with contractors, making the process streamlined and effective.

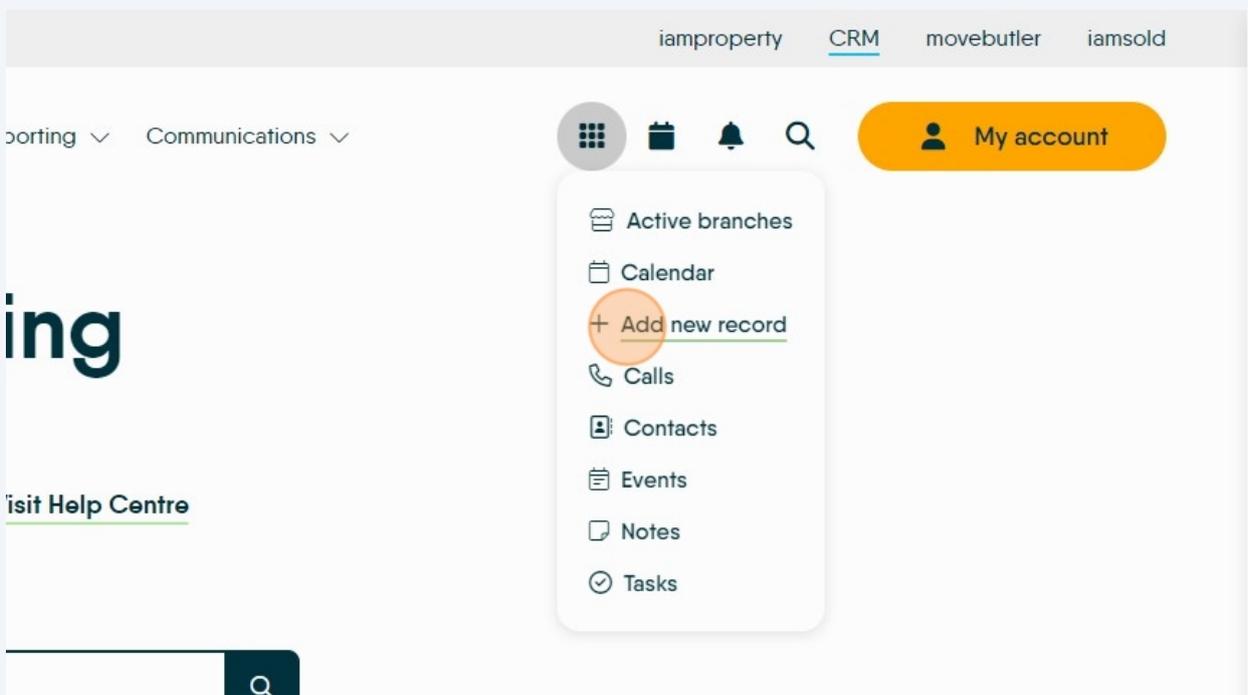ⓘ Tip! there are multiple ways to create a maintenance task.

1 First option is from the Property Management menu. Click "Create maintenance Job"
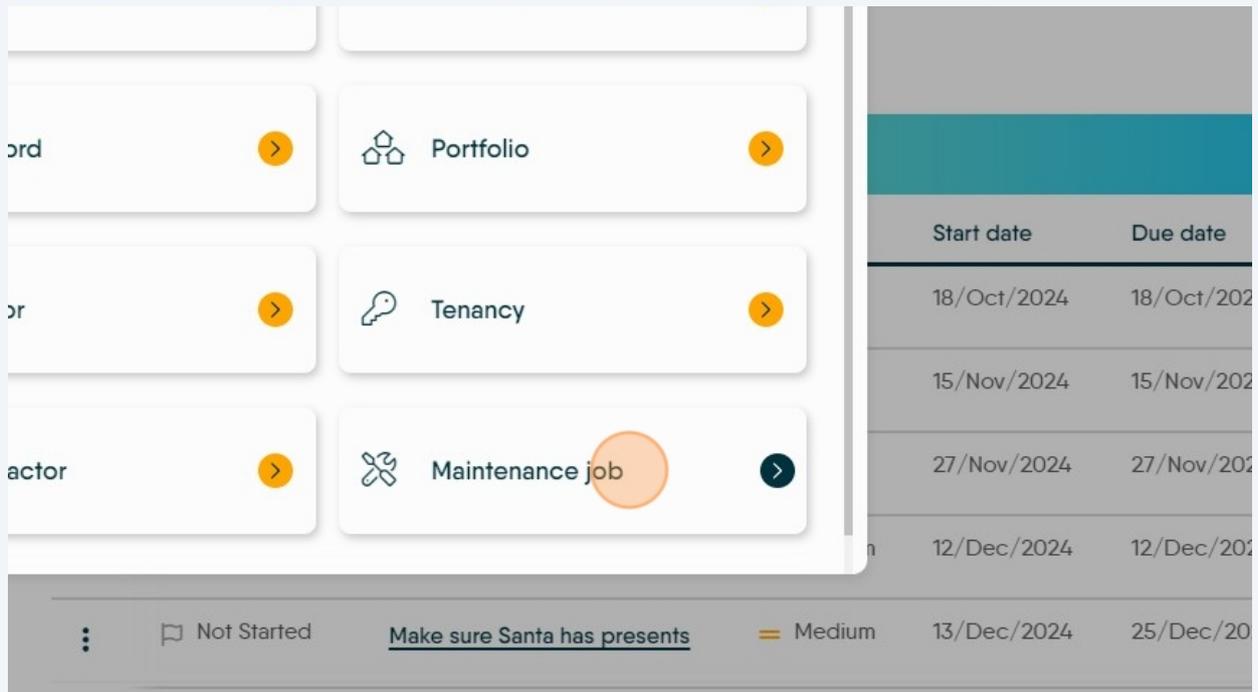
Property management

Property management dashboard	Feedback Centre	Mainte
Create maintenance Job	Inspections	Repor
E-sign	Invoices	Contr：

⊘ Audit   Sale：

2 The second way is to Click "Bento Menu"

3 Click "Add new record"

4 Click "Maintenance job"

				Start date	Due date
ord	Portfolio			18/Oct/2024	18/Oct/202
or	Tenancy			15/Nov/2024	15/Nov/202
actor	Maintenance job			27/Nov/2024	27/Nov/202
			n	12/Dec/2024	12/Dec/202
⋮	⚑ Not Started	Make sure Santa has presents	═ Medium	13/Dec/2024	25/Dec/20

5 Or from the Property Management Dashboard. Click here.

Jobs Outstanding	Jobs Offered	Jobs Assigned	Jobs Co
4	0	0	160

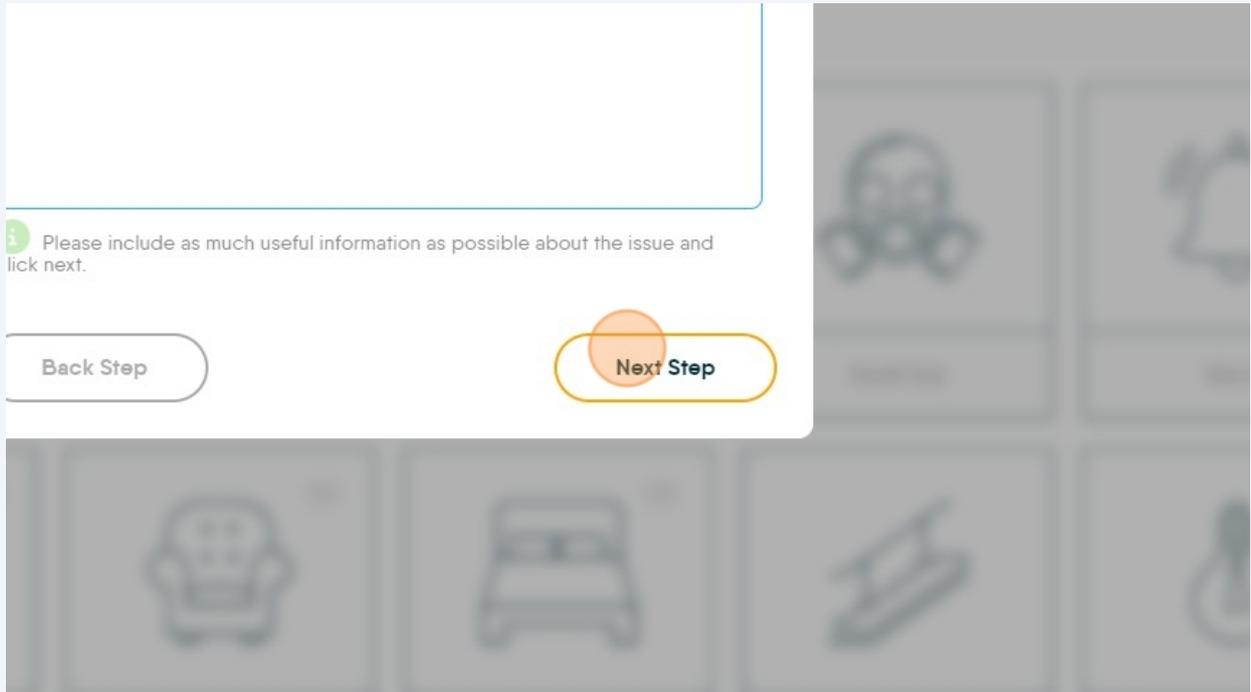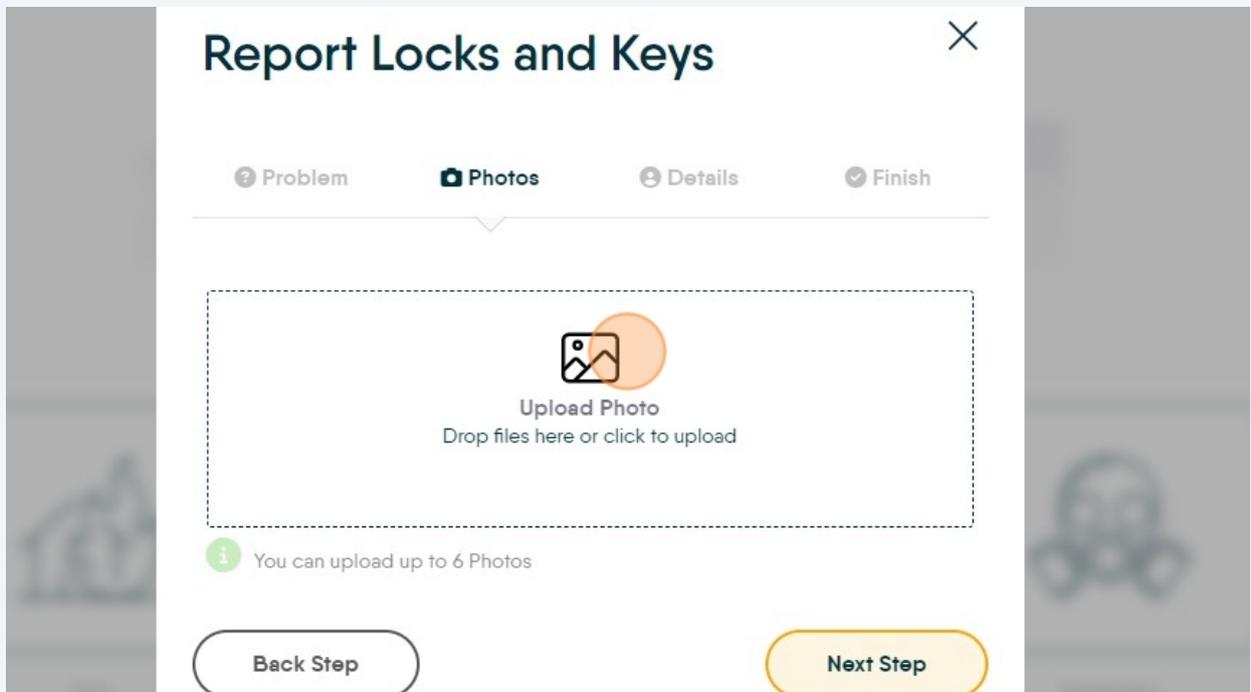| Create Job	My Jobs	Feedback Centre	Invoices
+	⚒	✎	🗎
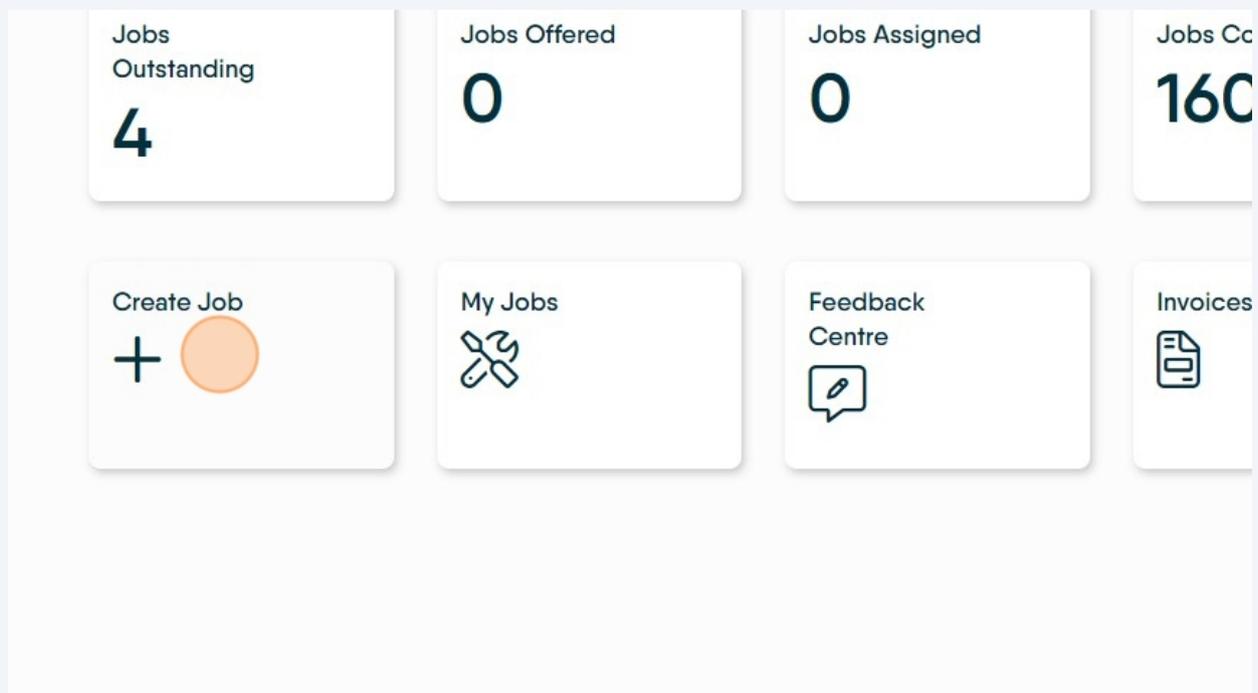
6 Click here to select the type of task you are creating.
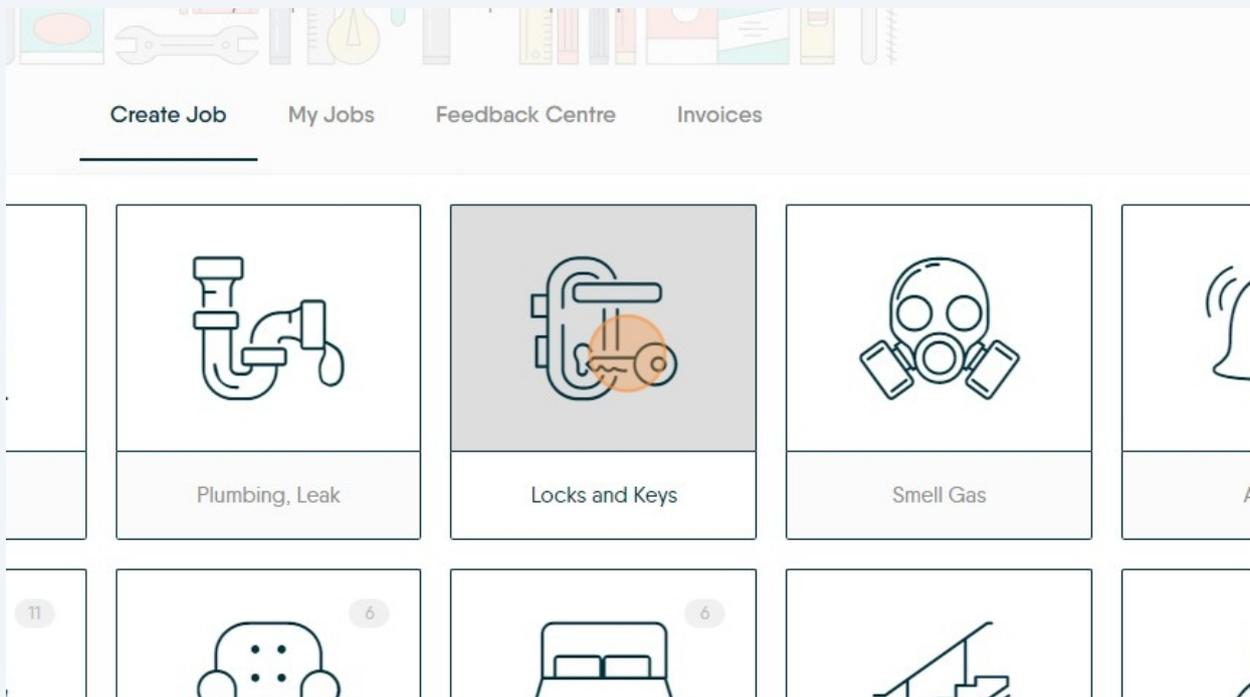
7 Click the "Notes" field. Add the description of the maintenance required.

8 Click "Next Step"

Please include as much useful information as possible about the issue and
lick next.

Back Step
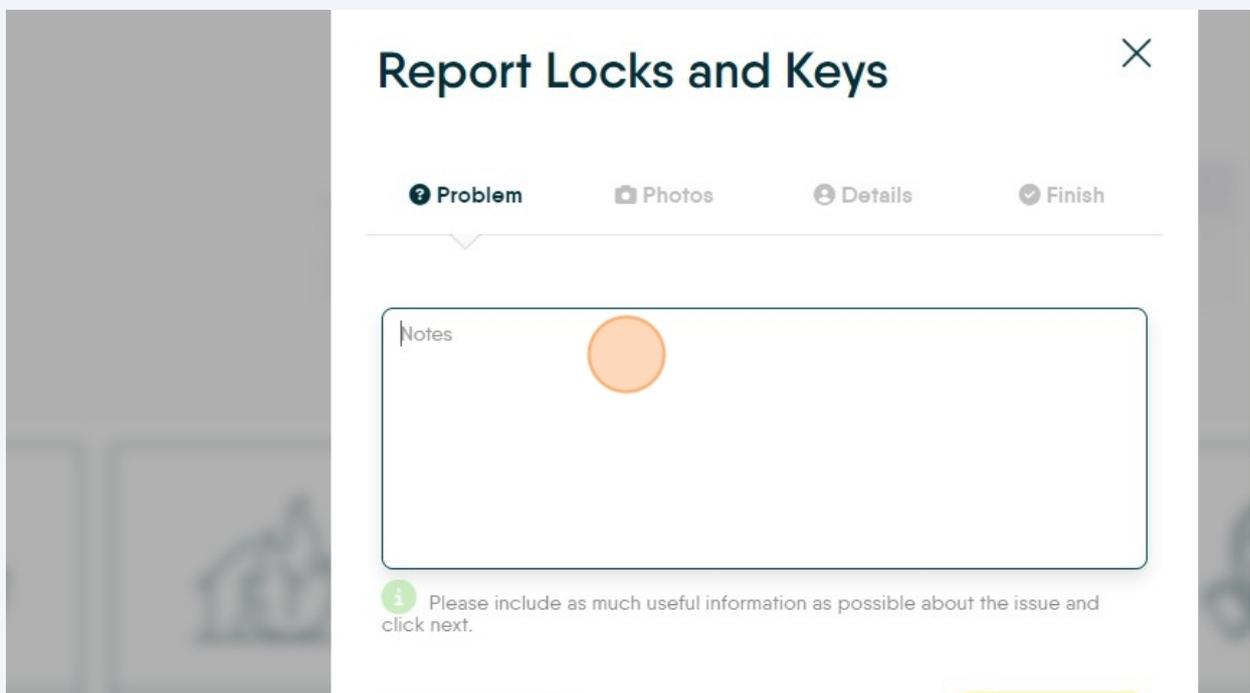
Next Step

9 Click here to add any images.

Report Locks and Keys

❓ Problem   📷 **Photos**   👤 Details   ✔ Finish

Upload Photo
Drop files here or click to upload

ℹ You can upload up to 6 Photos

Back Step   Next Step
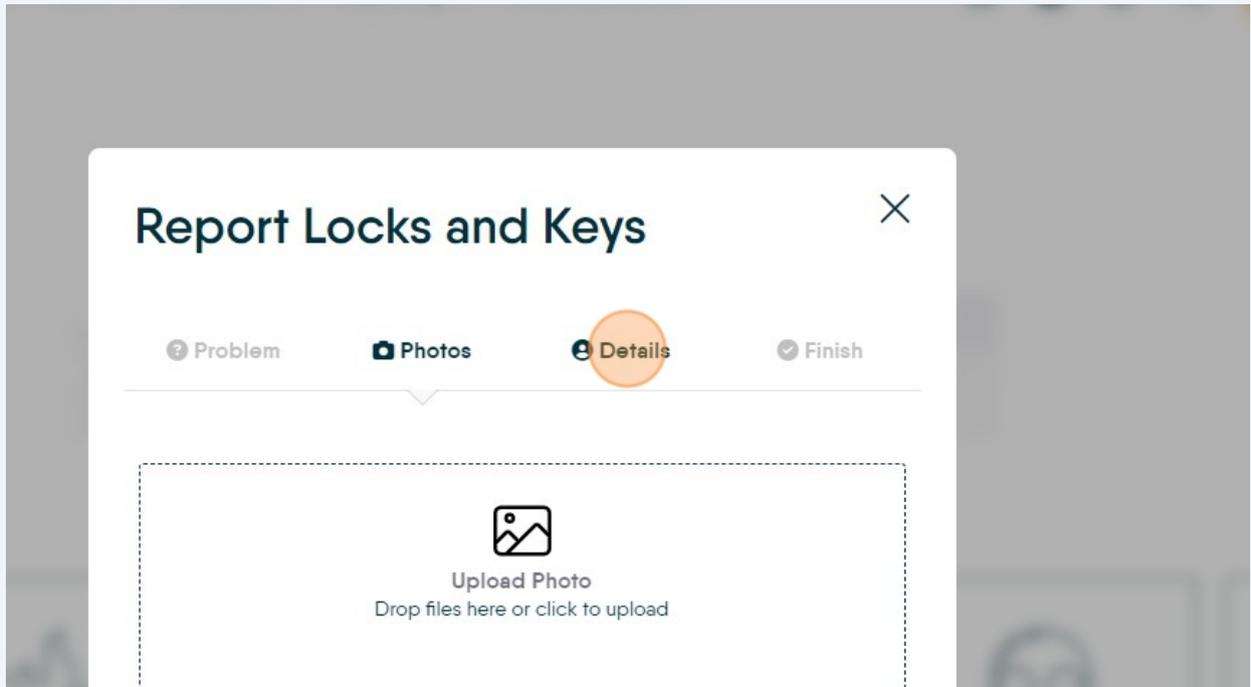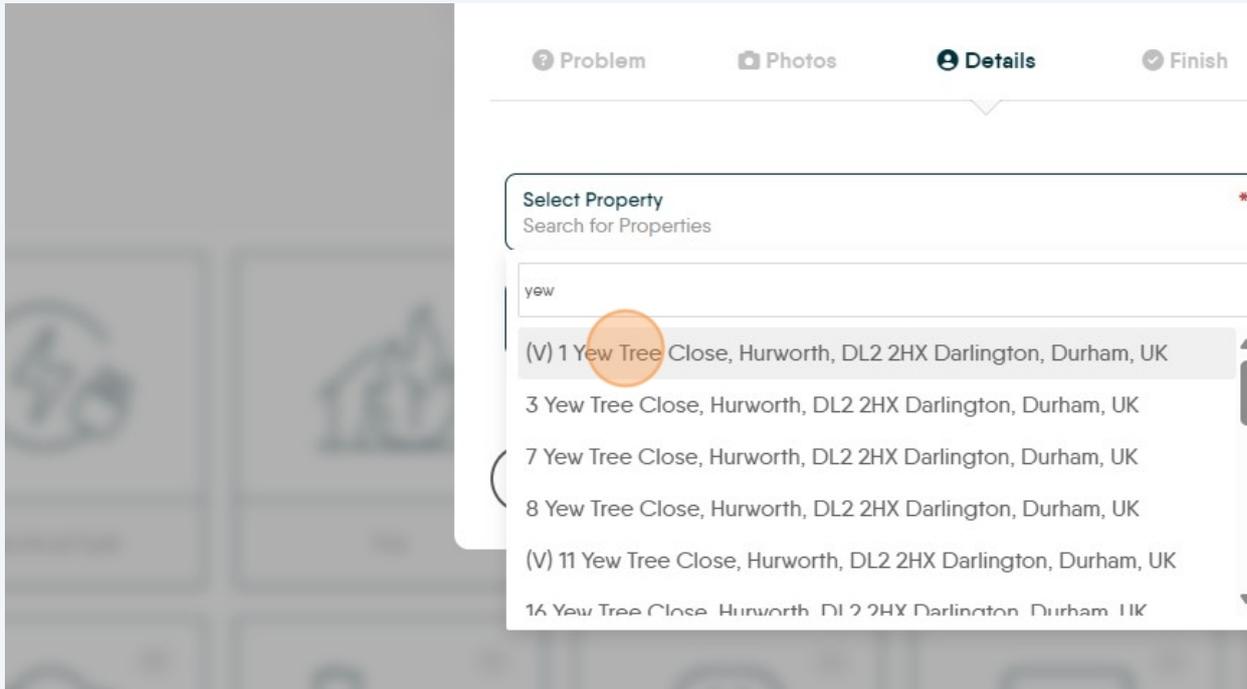
10 Click "Details"
then Click "Search for Properties" to find and add the property the maintenance is for.
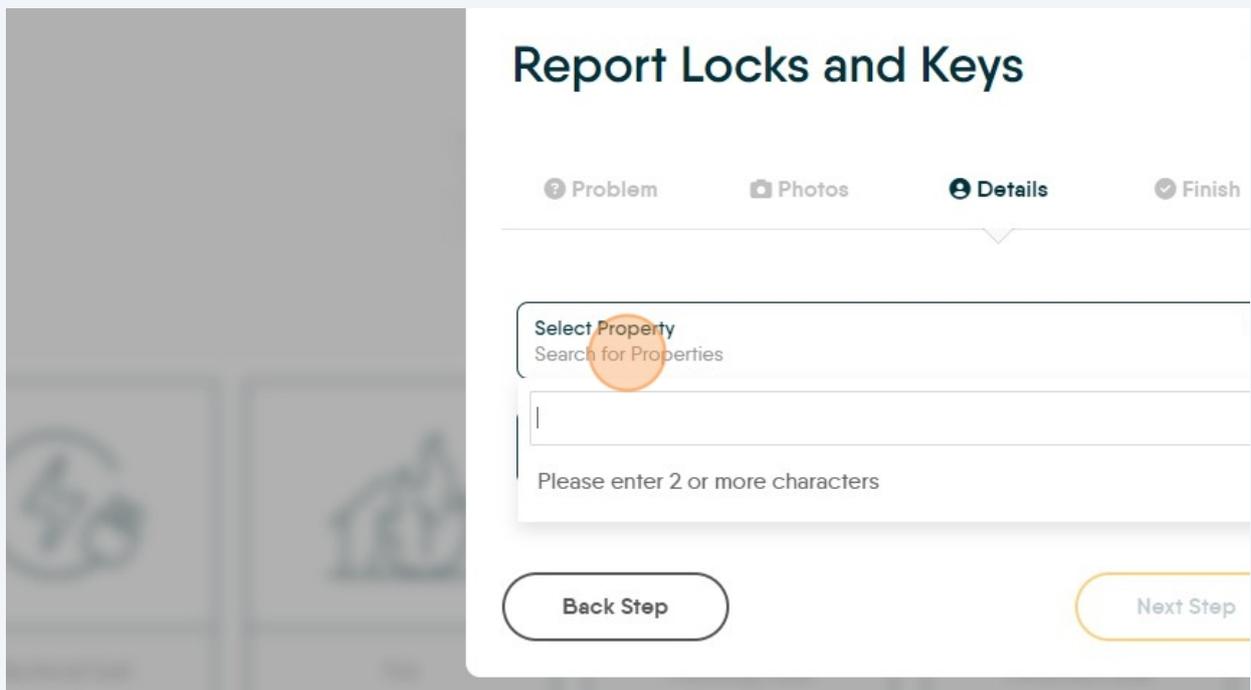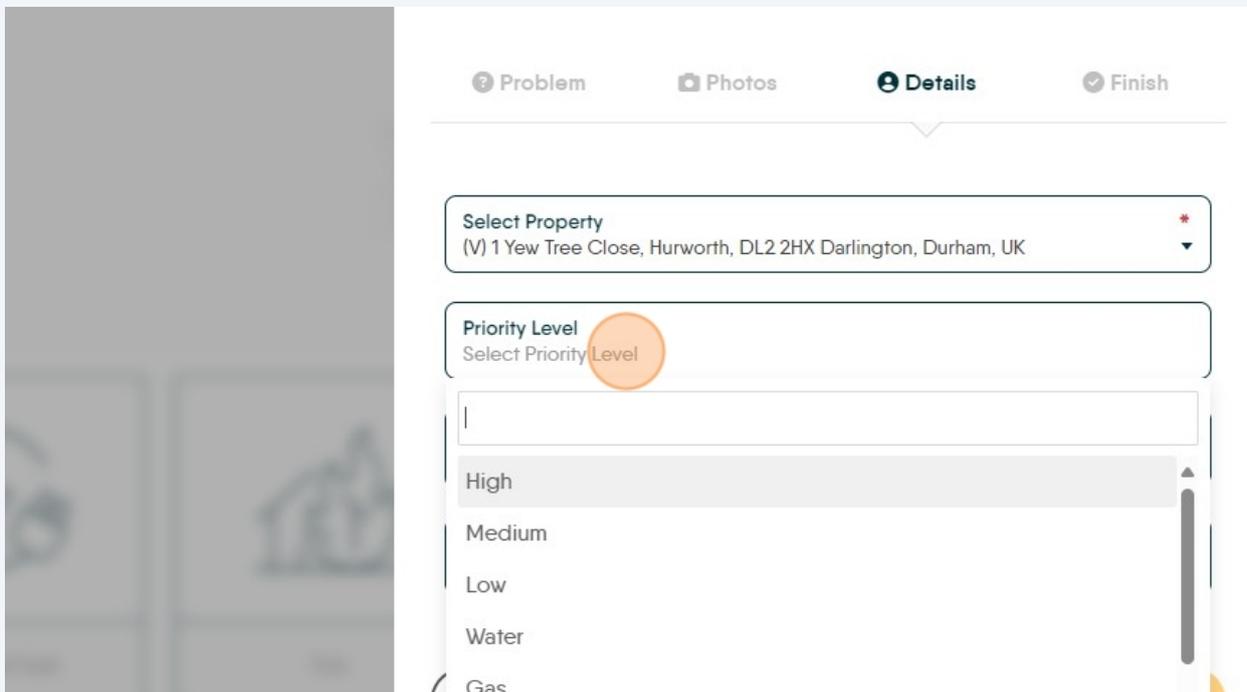
11 Click "(V) 1 Yew Tree Close, Hurworth, DL2 2HX Darlington, Durham, UK" n.b. the 'V' indicates the property is vacant.

12 Click "Select Priority Level" if required.
Click "High"

Select Property
(V) 1 Yew Tree Close, Hurworth, DL2 2HX Darlington, Durham, UK

Priority Level
Select Priority Level

High

Medium

Low

Water

Gas

Electric

---

13 Select the name of the tenant reporting the task

Select Property *
(V) 1 Yew Tree Close, Hurworth, DL2 2HX Darlington, Durham, UK

Priority Level
High

Select Tenant
N/A

Email Address

Telephone

Mobile

N/A

Back Step

Next Step

14   Click "Next Step"

15   Set any access restrictions and notes. Click "Finish Report"

16 If you have finished adding jobs Click "No"
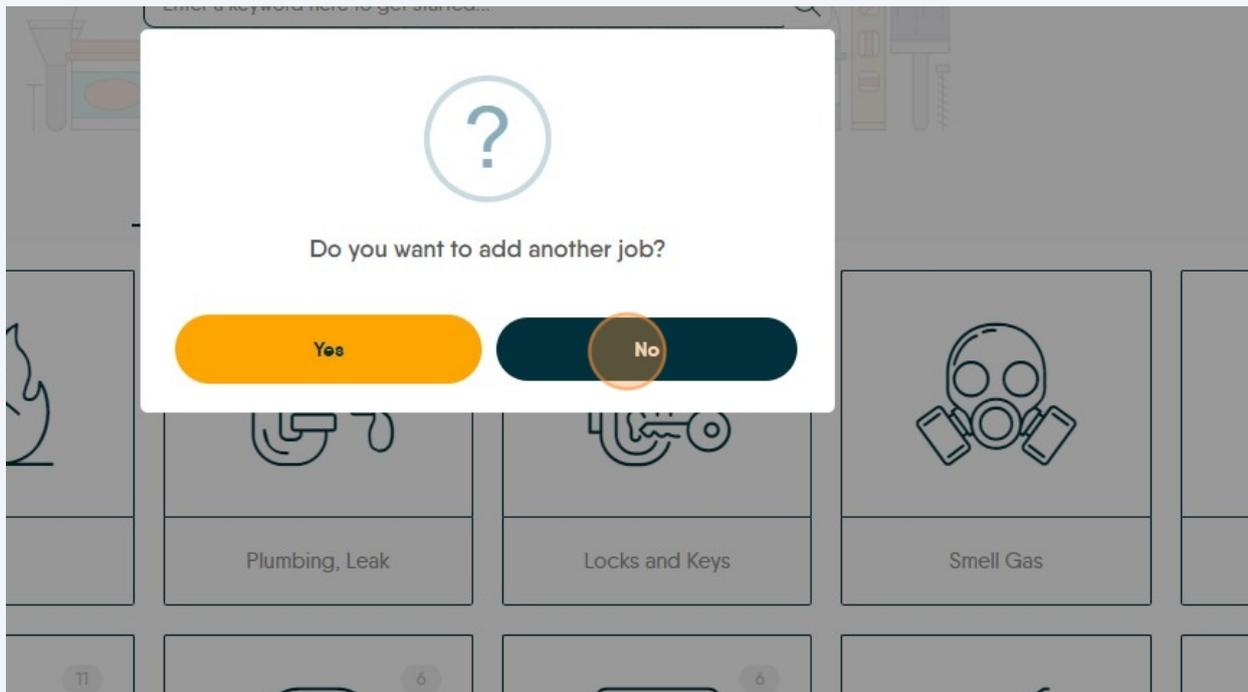
Assign to a Contractor

17 Click here to select the job.

Water | Gas | Electric | Court of Protection | None

Priority: High

Notes: add the problem description

Hurworth, Darlington (Locks and Keys)

✓ Complete Job   ✗ Cancel Job

Priority: Water

Notes: leak

Hurworth, Darlington (Plumbing, Leak)

ob   ✗ Cancel Job

Contractor:
Morgan Cont
Completion [
02/01/2025
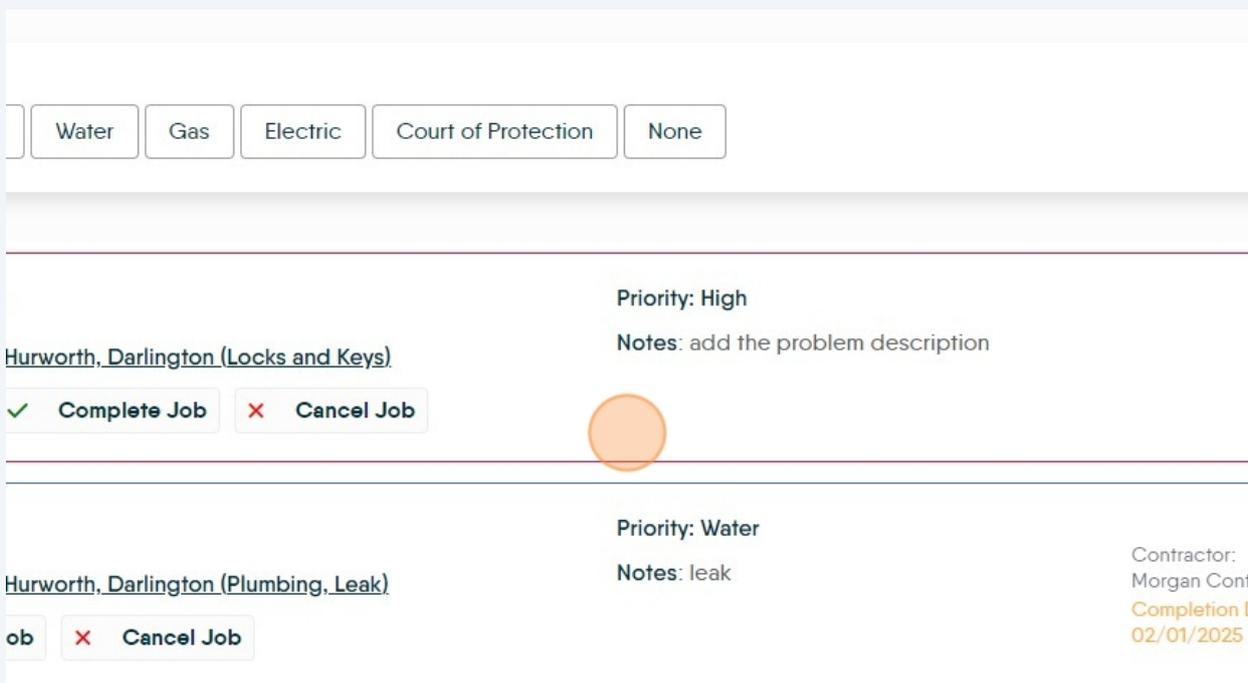
18 Click "ASSIGN"

Filter by Priority Level

| High | Medium | Low | Water | Gas | Electric | Court of Protection | None |

Created 460101

1 Yew Tree Close, Hurworth, Darlington (Locks and Keys)

Priority: High

Notes: add the proble

⚒ ASSIGN   ✓ Complete Job   ✗ Cancel Job

Live 459652

1 Yew Tree Close, Hurworth, Darlington (Plumbing, Leak)

Priority: Water

Notes: leak

✓ Complete Job   ✗ Cancel Job

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19 or Click "the property details"

Filter by Priority Level

| High | Medium | Low | Water | Gas | Electric | Court of Protection | None |

Created 460101

1 Yew Tree Close, Hurworth, Darlington (Locks and Keys)

Priority: High

Notes: add the proble

⚒ ASSIGN   ✓ Complete Job   ✗ Cancel Job

Live 459652

1 Yew Tree Close, Hurworth, Darlington (Plumbing, Leak)

Priority: Water

Notes: leak

✓ Complete Job   ✗ Cancel Job

20 from the record Click "Assign"

1 Yew Tree Close, Hurworth, Darlington

Job Fault
Locks and Keys

Priority Level
High

TD

add the problem description

Created ▾

⚒ Assign

Photos   Tenant(s)   Offers   Landlord(s)   Contractor   Comments   Feedback   Invoi

☁ Upload Photos

⚠ Alert! There are 3 options, to allocate the job to 1 contractor to get the work completed use either 'assign task and email...' or 'assign task and don't email...'. To give multiple Contractors the option to quote for the task before allocating, use the 'Offer task and email Contractor' option.

21 Click "Assign to contractors and don't send notification email"

Assign To Contractors   ×

Offer Task & Email Contractor	Assign Task & Email Contractor	Assign Task & Don't Email Contractor
Offer task to contractors and send notification email	Assign to contractors and send notification email	Assign to contractors and don't send notification email

Offer Duration   *
02/01/2025

Quote Required   *
No

Filter Contractor by   All Branches ⬤

Select Contractors ⍰   *
Select Contractor

---

22 Click this search field. Search for and select the contractor.
Click "contractor name"

Offer Task & Email Contractor	Assign Task & Email Contractor	Assign Task & Don't Email Contractor
Offer task to contractors and send notification email	Assign to contractors and send notification email	Assign to contractors and don't send notification email

Filter Contractor by   All Branches ⬤
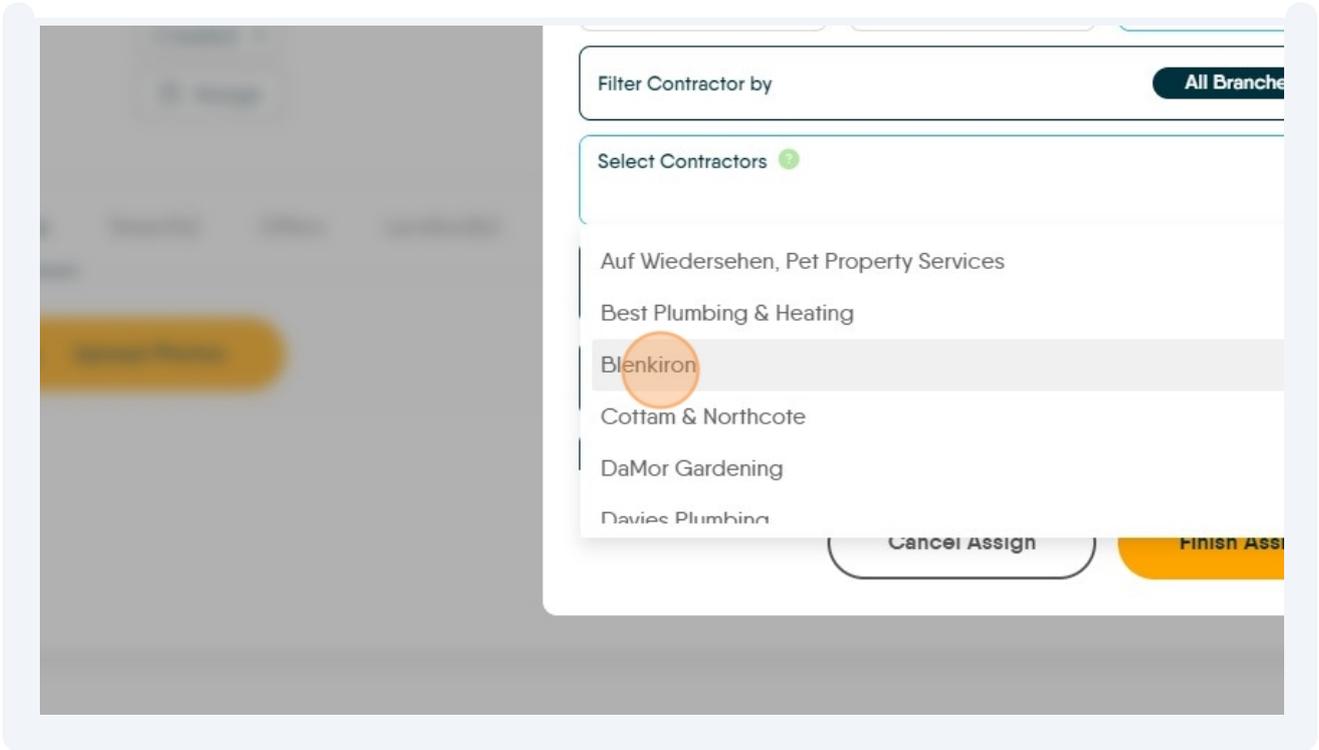
Select Contractors ⍰   *

Note.....

Property Occupied   Job Completion Date
No   02/01/2025

Authorised Budget

Filter Contractor by   All Branche

Select Contractors ⓘ

Auf Wiedersehen, Pet Property Services

Best Plumbing & Heating

Blenkiron

Cottam & Northcote

DaMor Gardening

Davies Plumbing

Cancel Assign   Finish Assi

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23 Click the "Note....." field. Add the job description for the Contractor, usually more detailed that the first job description

email   email   notification email

Filter Contractor by   All Branches

Select Contractors ⓘ

Blenkiron ✕

Note.....

Property Occupied   Job Completion Date
No   02/01/2025

Cancel Assign   Finish Assig
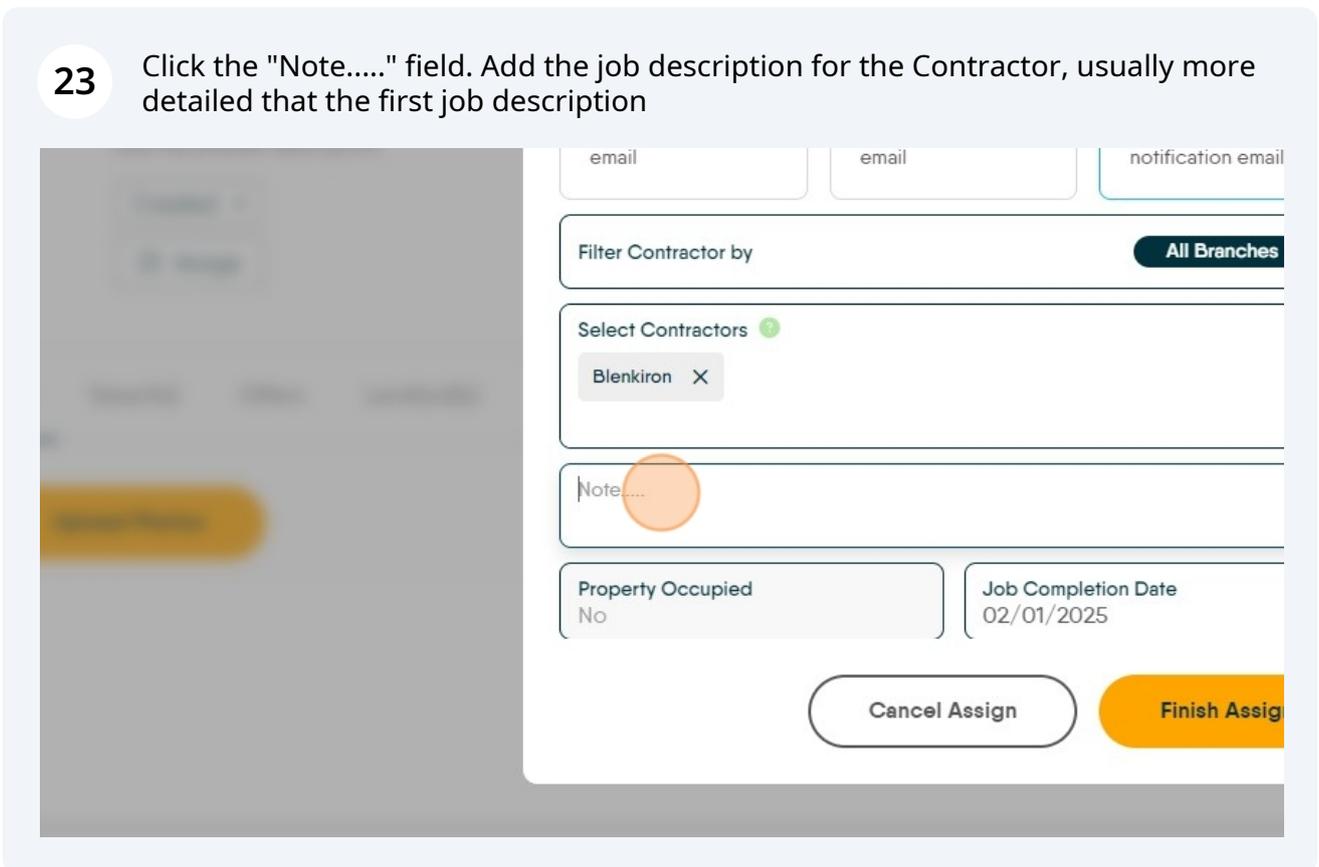
24 Click the "Select the Date" field add a completion date.

Select Contractors ❓ *

Blenkiron ✕ ✕

add job details for contractor

Property Occupied
No

Job Completion Date
02/01/2025

Authorised Budget
£ 0

Cancel Assign   Finish Assign

25 Click "Finish Assign" to send the job to the contractor.

dd job details for contractor

roperty Occupied
No

Job Completion Date
24/01/2025

uthorised Budget
0

Cancel Assign   Finish Assign