

Property Management - Adding an Invoice and Updating Expenses in CRM



This guide provides essential instructions for effectively managing property-related invoices and tasks within the iamproperty CRM.

Also shows how to easily see if there is an invoice added to an already completed task.

1 Navigate to <https://crm.iamproperty.com/Toolbox/TaskList>

Search for reports that people have created for you

Search for ID, name, report, telephone, email or address

Create Job My Jobs Feedback Centre Invoices

Filter by Priority Level

High Medium Low Water Gas Electric Court of Protection None

	Live 493661	Priority: Electric Notes: ggg	Contractor: Morgan Contracting Completion Date: 17/03/2025	Mrs Audrey Morgan Created: 13/03/2025 14:26:02 Updated: 17/03/2025 08:21:19 Updated by: Training Dave
	Live 493657	Priority: None Notes: No heating	Contractor: Morgan Contracting	Miss Ella Petch Created: 13/03/2025 14:26:02

2

Select the Property you are adding the invoice to. Clicking on the Property address will take you into the record.



Search for reports that people have created for you

Search for ID, name, report, telephone, email or address

Create Job **My Jobs** Feedback Centre Invoices

Filter by Priority Level

High Medium Low Water Gas Electric Court of Protection None


 <div> <div>Live 493661</div> <div>Flat 14 Westpoint, Northumberland Street, Darlington (Electric, Heating, Lights)</div> <div> <div>✓ Complete Job</div> <div>✗ Cancel Job</div> </div> </div>	<div>Priority: Electric</div> <div>Notes: ggg</div>	<div>Contractor: Morgan Contracting</div> <div>Completion Date: 17/03/2025</div>	<div>Mrs Audrey Morgan</div> <div>Created: 13/03/2025 14:26:02</div> <div>Updated: 17/03/2025 08:21:19</div> <div>Updated by: Trainin</div>
 <div> <div>Live 493657</div> <div>24 Westgarth Terrace, Darlington (Gas Heating)</div> <div> <div>✓ Complete Job</div> <div>✗ Cancel Job</div> </div> </div>	<div>Priority: None</div> <div>Notes: No heating</div>	<div>Contractor: Morgan Contracting</div> <div>Completion Date: 13/03/2025</div>	<div>Miss Ella Petch</div> <div>Created: 13/03/2025 14:26:02</div> <div>Updated: 13/03/2025 14:41:05</div> <div>Updated by: Trainin</div>

3

Click "Live" and change the option to Completed

iam property My day Lettings Sales Accounts Reporting Communications

Property Management > Maintenance Jobs > Report #493661



Flat 14 Westpoint, Northumberland Street, Darlington

Job Fault
Electric, Heating, Lights

Priority Level
Electric

ggg

Live

Unassign Resend to contractor

Sign In Sign Out

Mrs Audrey Morgan
zagg.dave@gmail.com
0789321654

Flat 14 Westpoint, Northumberland Street
Darlington
County Durham
DL3 7HB
UK

Vulnerable Occupier No

Access Authority Yes

Contact Details Consent Yes

Assigned to: Morgan Contracting

Created: 13/03/2025 14:26:02

Updated: 17/03/2025 08:21:19

Job Completion Date: 17/03/2025

Price Agreed: £0.00

Authorised Budget: £0.00

Photos Tenant(s) Offers Landlord(s) Contractor Comments Feedback Invoice Documents Audit

Upload Photos

4 Click "Completed"

Property Management > Maintenance Jobs > Report #493661

Flat 14 Westpoint, Northumberland Street, Darlington

Job Fault: Electric, Heating, Lights | Priority Level: Electric

999

Live | **Completed** | Cancelled

Resend to contractor

Sign Out

Mrs Audrey Morgan
zagg.dave@gmail.com
0789321654

Flat 14 Westpoint, Northumberland Street
Darlington
County Durham
DL3 7HB
UK

Vulnerable Occupier No
Access Authority Yes
Contact Details Consent Yes
Assigned to: Morgan Contracting
Created: 13/03/2025 14:26:02
Updated: 17/03/2025 08:21:19
Job Completion Date: 17/03/2025
Price Agreed: £0.00
Authorised Budget: £0.00

Photos | Tenant(s) | Offers | Landlord(s) | Contractor | Comments | Feedback | Invoice | Documents | Audit

Upload Photos

Photos
You have no photos

5 Click "Yes, Change"

Flat 14 Westpoint, Northumberland Street, Darlington

Job Fault: Electric, Heating, Lights | Priority Level: Electric

999

Live | Unassign | Resend to contractor

Sign In | Sign Out

Mrs Audrey Morgan
zagg.dave@gmail.com
0789321654

Flat 14 Westpoint, Northumberland Street
Darlington
County Durham
DL3 7HB
UK

Vulnerable Occupier No
Access Authority Yes
Contact Details Consent Yes
Assigned to: Morgan Contracting
Created: 13/03/2025 14:26:02
Updated: 17/03/2025 08:21:19
Job Completion Date: 17/03/2025
Price Agreed: £0.00
Authorised Budget: £0.00

Tenant(s) | Offers | Landlord(s) | Contractor | Comments | Feedback | Invoice | Documents | Audit

Upload Photos

Photos
You have no photos

Change Status to Completed?
You cannot undo this

Cancel | **Yes, Change**




Tip! You may need to refresh the screen at this point to show the 'Add Invoice' option

6

Click "Add Invoice"

Property Management > Maintenance Jobs > Report #493661



Flat 14 Westpoint, Northumberland Street, Darlington

Job Fault
Electric, Heating, Lights

Priority Level
Electric

999

Completed

[→ Sign In](#) [↔ Sign Out](#)

[Add Invoice](#)

AM


Mrs Audrey Morgan
zagg.dave@gmail.com
0789321654

Flat 14 Westpoint, Northumberland Street
Darlington
County Durham
DL3 7HB
UK

Vulnerable Occupier No
Access Authority Yes
Contact Details Consent Yes
Assigned to: Morgan Contracting
Created: 13/03/2025 14:26:02
Updated: 17/03/2025 08:21:48
Job Completion Date: 17/03/2025
Price Agreed: £0.00 [✎](#)
Authorised Budget: £0.00 [✎](#)

[Photos](#) [Tenant\(s\)](#) [Offers](#) [Landlord\(s\)](#) [Contractor](#) [Comments](#) [Feedback](#) [Invoice](#) [Documents](#) [Audit](#)

[Upload Photos](#)

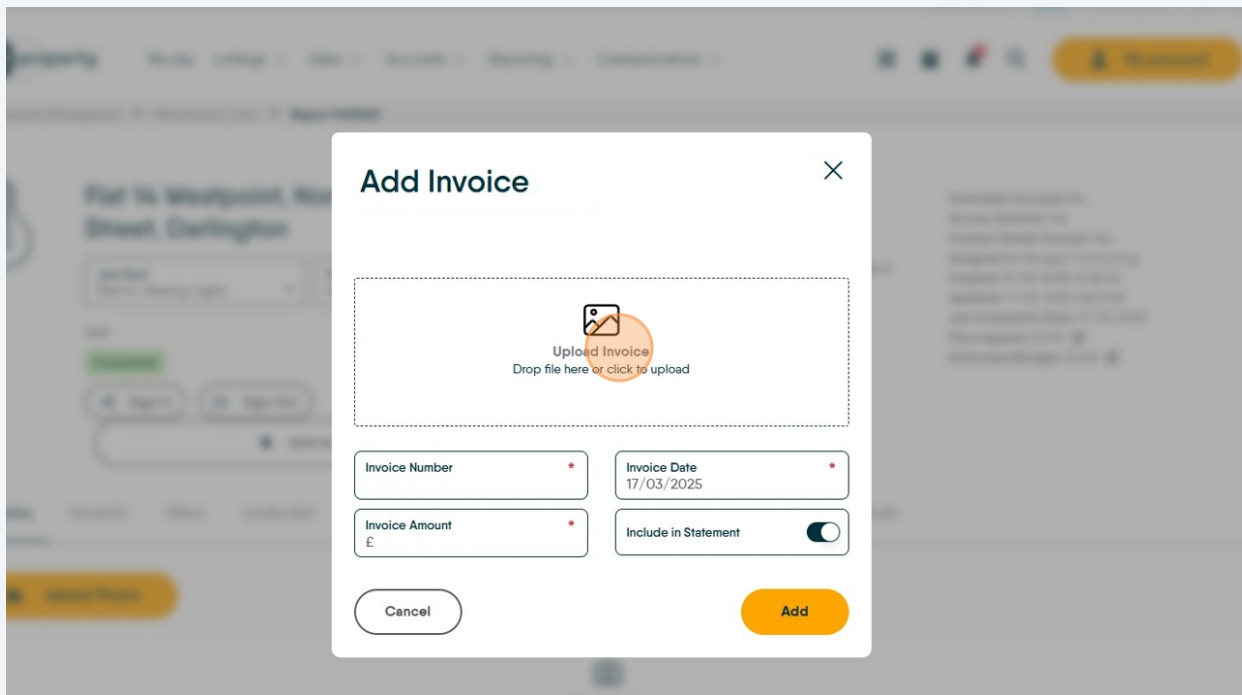


Photos

You have no photos

7

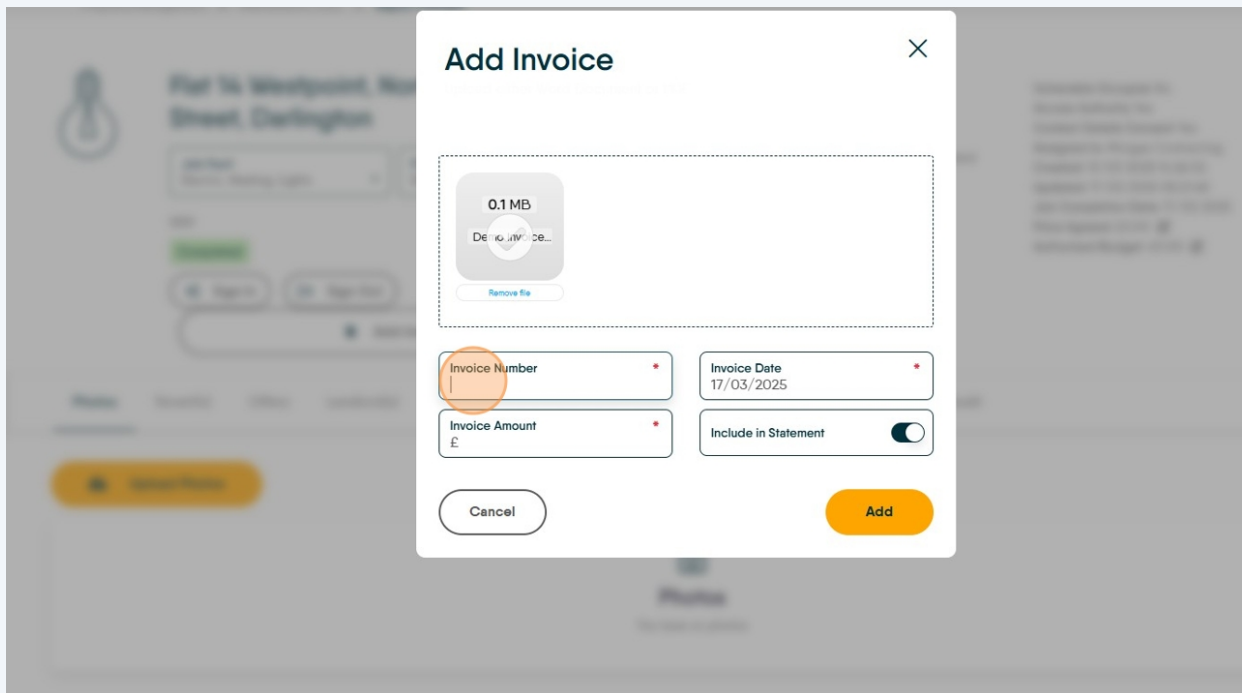
Click "Upload Invoice" and find the invoice to add. You can also drag the invoice document directly from your email (if the invoice was emailed to you)



The screenshot shows a web application interface with a modal titled "Add Invoice". The modal has a close button (X) in the top right corner. Inside the modal, there is a dashed box containing an "Upload Invoice" icon and the text "Drop file here or click to upload". Below this, there are four input fields: "Invoice Number" (with a red asterisk), "Invoice Date" (with a red asterisk and the value "17/03/2025"), "Invoice Amount" (with a red asterisk and the value "£"), and "Include in Statement" (a toggle switch). At the bottom of the modal, there are two buttons: "Cancel" and "Add".

8

Click this text field. Add the Contractor Invoice Number



This screenshot shows the same "Add Invoice" modal as in the previous image, but with a file upload area at the top. The file area shows a file named "0.1 MB" with a "Remove file" button below it. The "Invoice Number" field is now highlighted with an orange circle, indicating it is the next step in the process. The other fields and buttons remain the same.

9

Click this text field and add the Invoice amount, check the date in 'Invoice Date' is correct.

The screenshot shows the 'Add Invoice' modal form. At the top, there is a file upload section with a placeholder image labeled '0.1 MB' and 'Demo Invoice...'. Below this are four input fields: 'Invoice Number' (28), 'Invoice Date' (17/03/2025), 'Invoice Amount' (£), and a 'Cancel' button. A calendar overlay is visible, showing the month of March 2025, with the 17th selected. The background is a blurred view of a CRM interface.

10

Click "Add" this will add the completed job to 'Jobs Outstanding' in the Expenses section of CRM Accounts.

The screenshot shows the 'Add Invoice' modal form. The 'Invoice Amount' field now contains '£126.52'. The 'Include in Statement' toggle switch is turned on. The 'Add' button is highlighted with an orange circle. The background is a blurred view of a CRM interface.

11 Click "Accounts"

ianproperty CRM movebutler

My day Lettings Sales **Accounts** Reporting Communications

Property Management > Maintenance Jobs > Report #493661

Flat 14 Westpoint, Northumberland Street, Darlington

Job Fault: Electric, Heating, Lights Priority Level: Electric

999

Completed

Sign In Sign Out

Add Invoice

Photos Tenant(s) Offers Landlord(s) Contractor Comments Feedback Invoice Documents Audit

Upload Photos

Mrs Audrey Morgan
zagg.dave@gmail.com
0789321654

Flat 14 Westpoint, Northumberland Street
Darlington
County Durham
DL3 7HB
UK

Vulnerable Occupier No
Access Authority Yes
Contact Details Consent Yes
Assigned to: Morgan Contracting
Created: 13/03/2025 14:26:02
Updated: 17/03/2025 08:21:48
Job Completion Date: 17/03/2025
Price Agreed: £0.00
Authorised Budget: £0.00

To View/Check Invoice

12 Click "Invoices"

ianproperty CRM movebutler iamsold

My day Lettings Sales Accounts Reporting Communications

Create Job **My Jobs** Feedback Centre **Invoices**

Search for reports that people have created for you

Search for ID, name, report, telephone, email or address

Priority Level: Medium Low Water Gas Electric Court of Protection None

Live 493657

24 Westgarth Terrace, Darlington (Gas Heating)

Complete Job Cancel Job

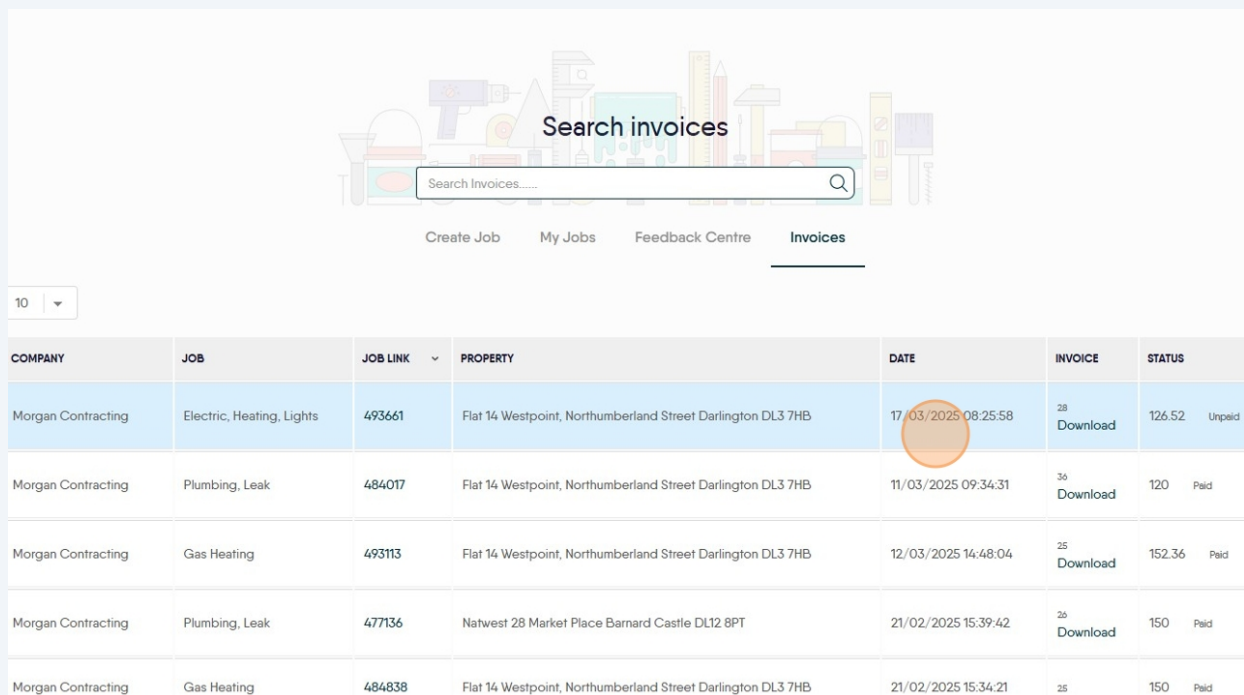
Priority: None
Notes: No heating

Contractor: Morgan Contracting
Completion Date: 13/03/2025

Miss Ella Petch
Created: 13/03/2025 14:20:36
Updated: 13/03/2025 14:41:05
Updated by: Training Dave

13

This screen shows all the completed jobs in Property Management. If 'Download' is shown then an invoice is added and can be viewed/downloaded.



COMPANY	JOB	JOB LINK	PROPERTY	DATE	INVOICE	STATUS
Morgan Contracting	Electric, Heating, Lights	493661	Flat 14 Westpoint, Northumberland Street Darlington DL3 7HB	17/03/2025 08:25:58	Download	126.52 Unpaid
Morgan Contracting	Plumbing, Leak	484017	Flat 14 Westpoint, Northumberland Street Darlington DL3 7HB	11/03/2025 09:34:31	Download	120 Paid
Morgan Contracting	Gas Heating	493113	Flat 14 Westpoint, Northumberland Street Darlington DL3 7HB	12/03/2025 14:48:04	Download	152.36 Paid
Morgan Contracting	Plumbing, Leak	477136	Natwest 28 Market Place Barnard Castle DL12 8PT	21/02/2025 15:39:42	Download	150 Paid
Morgan Contracting	Gas Heating	484838	Flat 14 Westpoint, Northumberland Street Darlington DL3 7HB	21/02/2025 15:34:21	Download	150 Paid

Expenses in Accounts

14 Click "Accounts dashboard"

The screenshot shows the ian property CRM interface. The top navigation bar includes links for My day, Lettings, Sales, Accounts (highlighted with an orange circle), Reporting, and Communications. Below this, the Accounts dashboard is displayed for Flat 14 Westpoint, Northumberland Street, Darlington. The dashboard includes a job status section with a lightbulb icon, a dropdown for Job Fault (Electric, Heating, Lights), a dropdown for Priority Level (Electric), and a status indicator (Completed). There are buttons for Sign In, Sign Out, and Add Invoice. The right side of the dashboard shows tenant details for Mrs Audrey Morgan, including contact information and a vulnerable occupier status. The bottom navigation bar includes links for Photos, Tenants, Offers, Landlords, Contractor, Comments, Feedback, Invoice, Documents, and Audit. An Upload Photos button is also visible.

15 Click here.

The screenshot shows the ian property CRM interface with various financial reports and invoices. The top navigation bar includes links for My day, Lettings, Sales, Accounts (highlighted with an orange circle), Reporting, and Communications. Below this, the Accounts dashboard is displayed for Flat 14 Westpoint, Northumberland Street, Darlington. The dashboard includes a job status section with a lightbulb icon, a dropdown for Job Fault (Electric, Heating, Lights), a dropdown for Priority Level (Electric), and a status indicator (Completed). There are buttons for Sign In, Sign Out, and Add Invoice. The right side of the dashboard shows tenant details for Mrs Audrey Morgan, including contact information and a vulnerable occupier status. The bottom navigation bar includes links for Photos, Tenants, Offers, Landlords, Contractor, Comments, Feedback, Invoice, Documents, and Audit. An Upload Photos button is also visible.

Accounts Dashboard Summary:

- Client Account:** £ 326,844.92 Reconciled, £ 313,960.43 Unreconciled
- Held Deposits:** £ 8,605.54 Reconciled, £ 11,490.15 Unreconciled
- Balance Sheet:** £ 348,554.91 Liabilities, £ 348,554.91

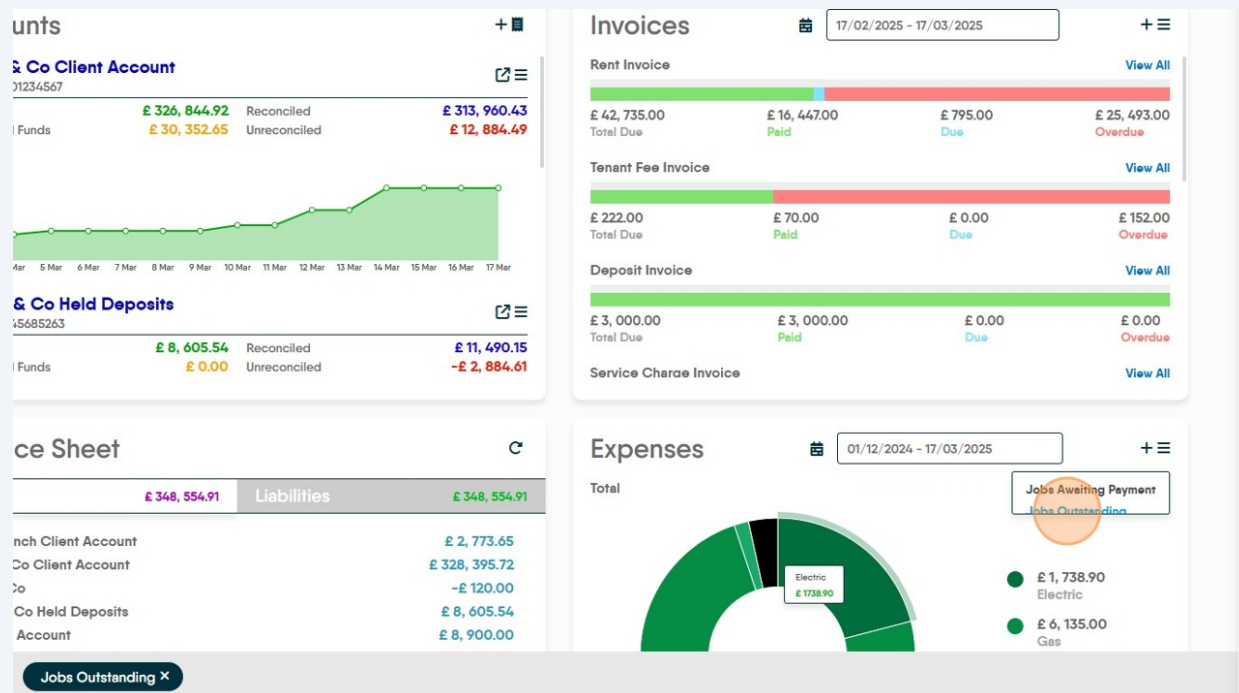
Invoices:

- Rent Invoice:** £ 42,735.00 Total Due, £ 16,447.00 Paid, £ 795.00 Due, £ 25,493.00 Overdue
- Tenant Fee Invoice:** £ 222.00 Total Due, £ 70.00 Paid, £ 0.00 Due, £ 152.00 Overdue
- Deposit Invoice:** £ 3,000.00 Total Due, £ 3,000.00 Paid, £ 0.00 Due, £ 0.00 Overdue
- Service Charge Invoice:** £ 0.00 Total Due, £ 0.00 Paid, £ 0.00 Due, £ 0.00 Overdue

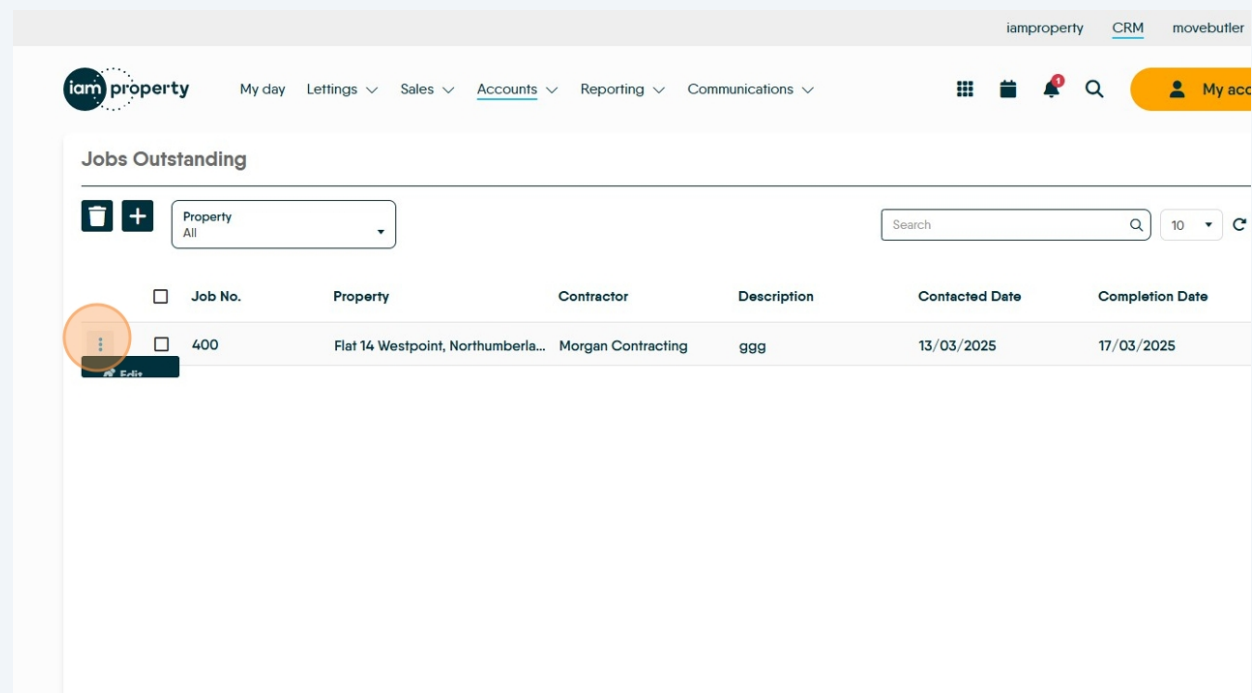
Expenses:

- Total:** £ 8,299.90
- Electric:** £ 1,738.90
- Gas:** £ 6,135.00

16 Click "Jobs Outstanding"



17 In Jobs Outstanding Click here.



18 Click "Edit"

iam property

My day Lettings Sales Accounts Reporting Communications

Jobs Outstanding

Property All

Search 10

Job No.	Property	Contractor	Description	Contacted Date	Completion Date
400	Flat 14 Westpoint, Northumberla...	Morgan Contracting	ggg	13/03/2025	17/03/2025

Edit Delete

19 In the Edit Expense screen. Click "Payment"

Edit Expense

Details Attachments Info Payment

Job No. 400 Job Date Contacted 13/03/2025

Title TB_ElectricHeatingLights Completion Date 17/03/2025

Property Flat 14 Westpoint, Northumberland Street, Darlington Contractor Morgan Contracting

Record Type Landlord Record Oliver Hardy (Primary)

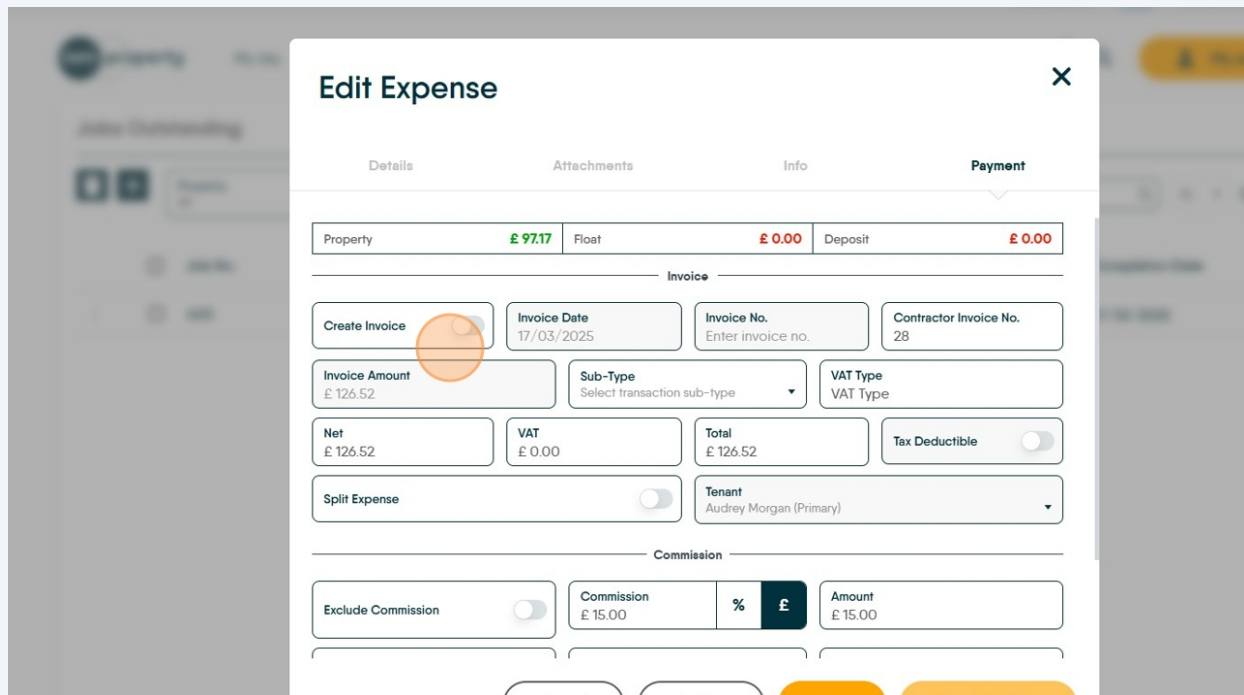
Expense Category Select expense category PM Job Category Electric, Heating, Lights Priority Level Electric

Description ggg

Notes Enter notes

20

This will show you the Invoice details if one has been added. An Invoice can be added here if required, into the Attachments tab.



Edit Expense

Details Attachments Info Payment

Property	£ 97.17	Float	£ 0.00	Deposit	£ 0.00
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Invoice

Create Invoice

Invoice Date
17/03/2025

Invoice No.
Enter invoice no.

Contractor Invoice No.
28

Invoice Amount
£ 126.52

Sub-Type
Select transaction sub-type

VAT Type
VAT Type

Net
£ 126.52

VAT
£ 0.00

Total
£ 126.52

Tax Deductible

Split Expense

Tenant
Audrey Morgan (Primary)

Commission

Exclude Commission

Commission
£ 15.00

% £

Amount
£ 15.00