

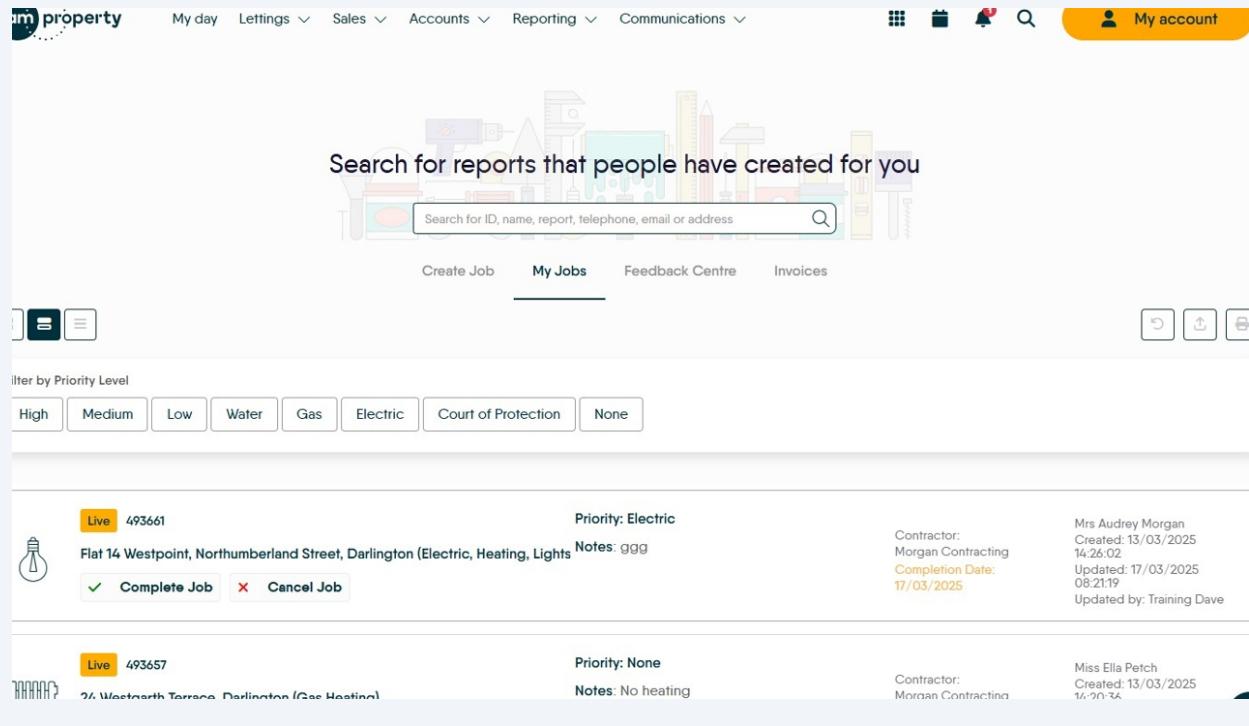
Property Management - Adding an Invoice and Updating Expenses in CRM



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>



The screenshot shows the 'My Jobs' section of the CRM. At the top, there is a search bar with placeholder text 'Search for ID, name, report, telephone, email or address'. Below the search bar are buttons for 'Create Job', 'My Jobs' (which is selected), 'Feedback Centre', and 'Invoices'. There are also filter icons for 'Priority Level' and 'Status'. The main area displays two completed tasks:

- Job 493661:** Priority: Electric. Notes: ggg. Contractor: Morgan Contracting. Completion Date: 17/03/2025. Updated by: Training Dave. Status: Live. Task details: Flat 14 Westpoint, Northumberland Street, Darlington (Electric, Heating, Lights). Actions: Complete Job, Cancel Job.
- Job 493657:** Priority: None. Notes: No heating. Contractor: Morgan Contracting. Status: Live. Task details: 26 Westgate Terrace, Darlington (Gas Heating). Actions: Complete Job, Cancel Job.

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

Job Status	Job ID	Address	Priority	Notes	Contractor	Completion Date	Updated by
Live	493661	Flat 14 Westpoint, Northumberland Street, Darlington (Electric, Heating, Lights)	Electric	Notes: ggg	Morgan Contracting	17/03/2025	Mrs Audrey Morgan
Live	493657	24 Westgarth Terrace, Darlington (Gas Heating)	None	Notes: No heating	Morgan Contracting	13/03/2025	Miss Ella Petch

3 Click "Live" and change the option to Completed

Property Management > Maintenance Jobs > Report #493661

Flat 14 Westpoint, Northumberland Street, Darlington

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

Live →

Completed →

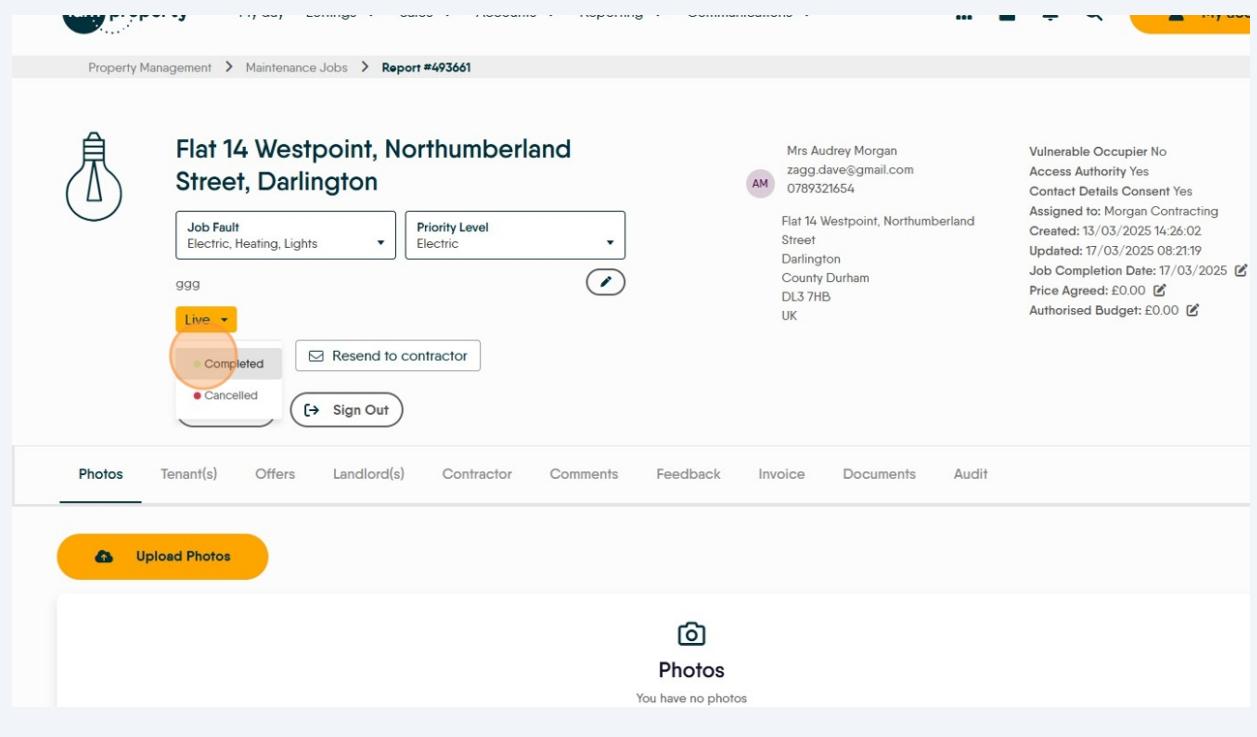
Unassign Resend to contractor

Sign In Sign Out

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 (highlighted with a red circle)

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

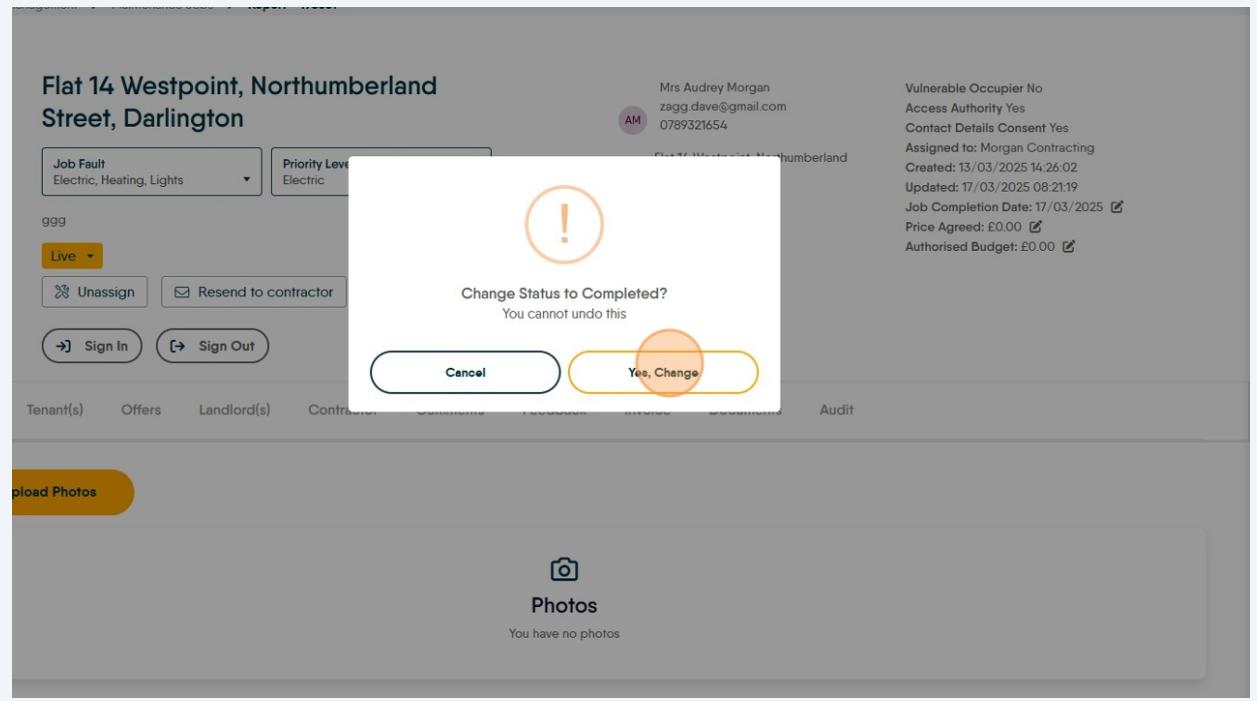
Photos Tenant(s) Offers Landlord(s) Contractor Comments Feedback Invoice Documents Audit

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

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 (highlighted with a red circle)

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



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

Completed

Sign In | Sign Out | Add Invoice

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

Upload Photos

Photos
You have no photos

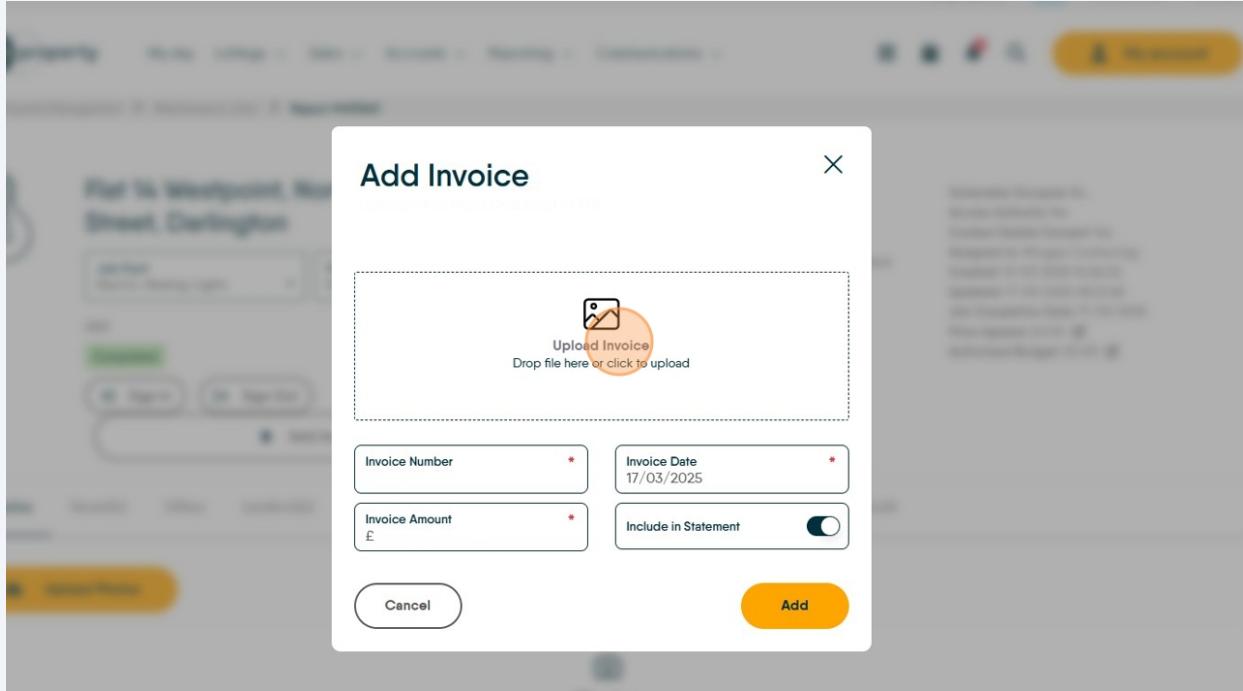
Mrs Audrey Morgan
zagg.dave@gmail.com
0789321654

AM

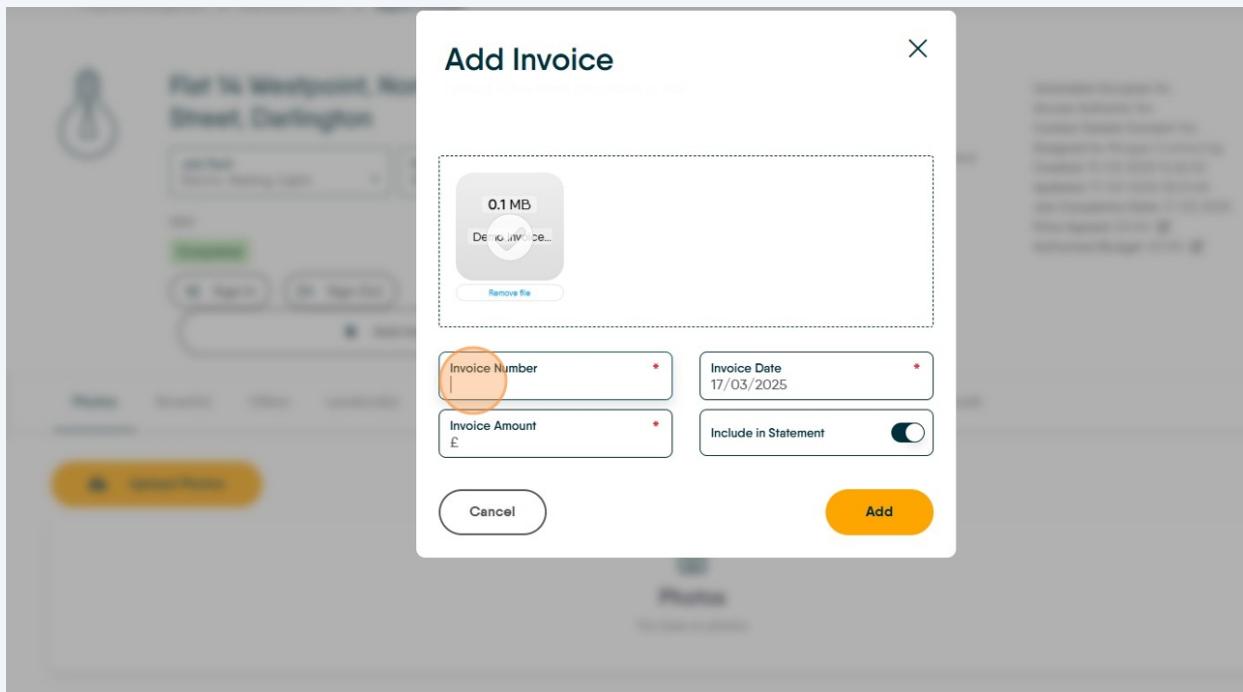
Flat 14 Westpoint, Northumberland Street
Darlington
County Durham
DL3 7HB
UK

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

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)

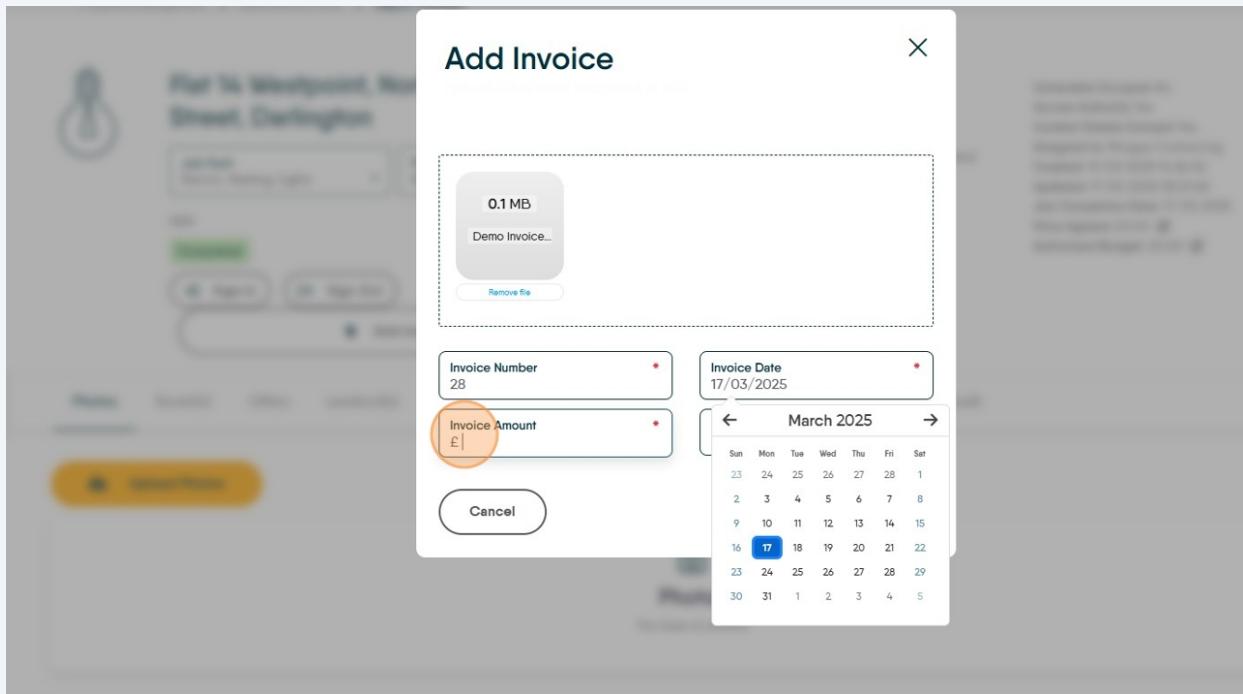


8 Click this text field. Add the Contractor Invoice Number



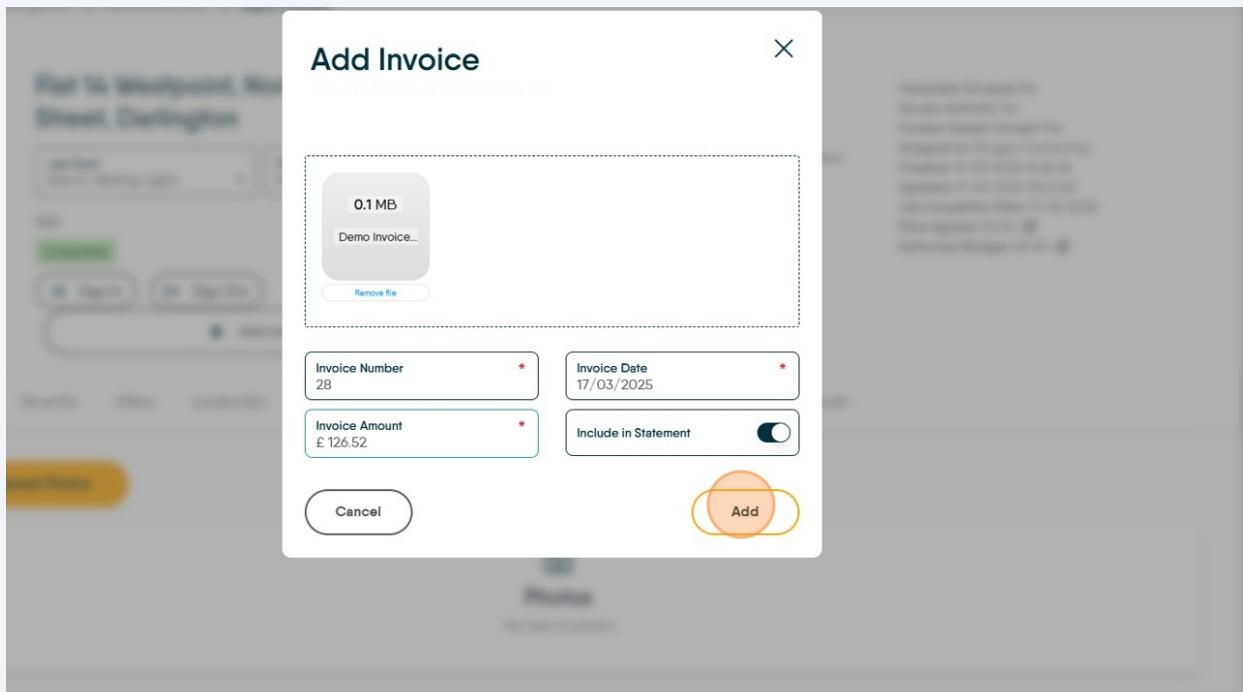
9

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

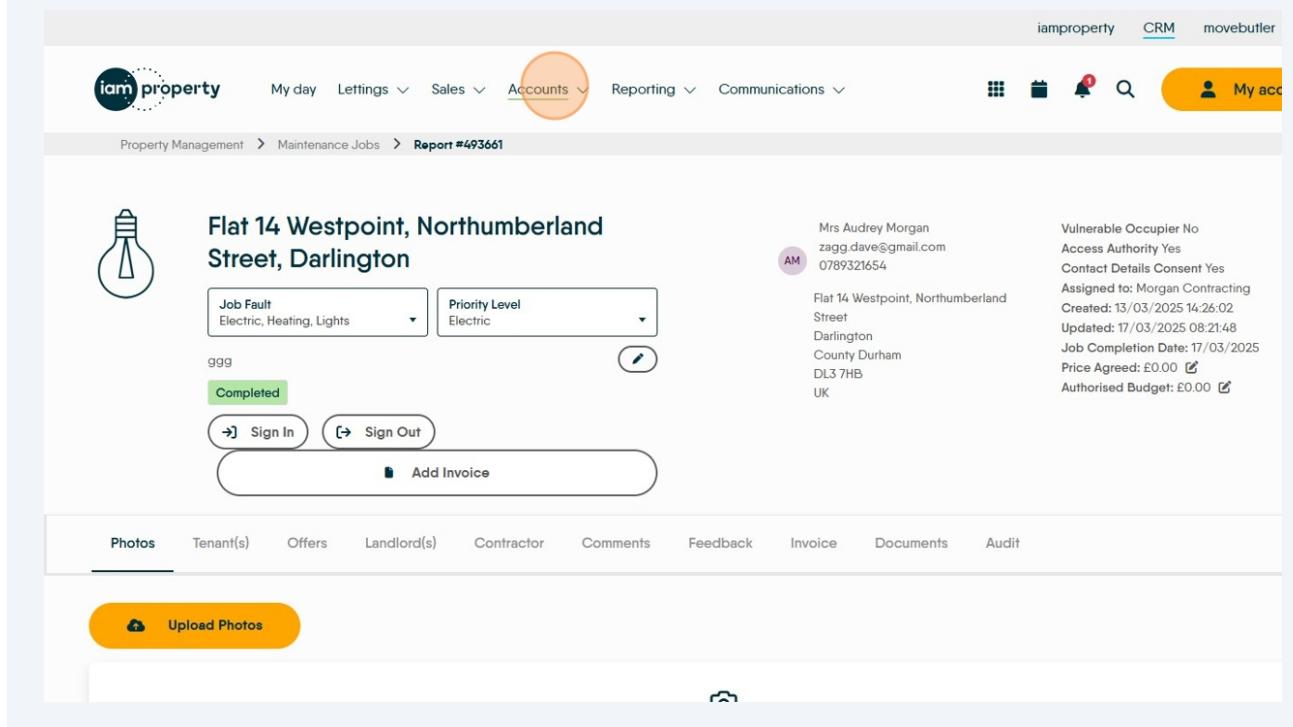


10

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



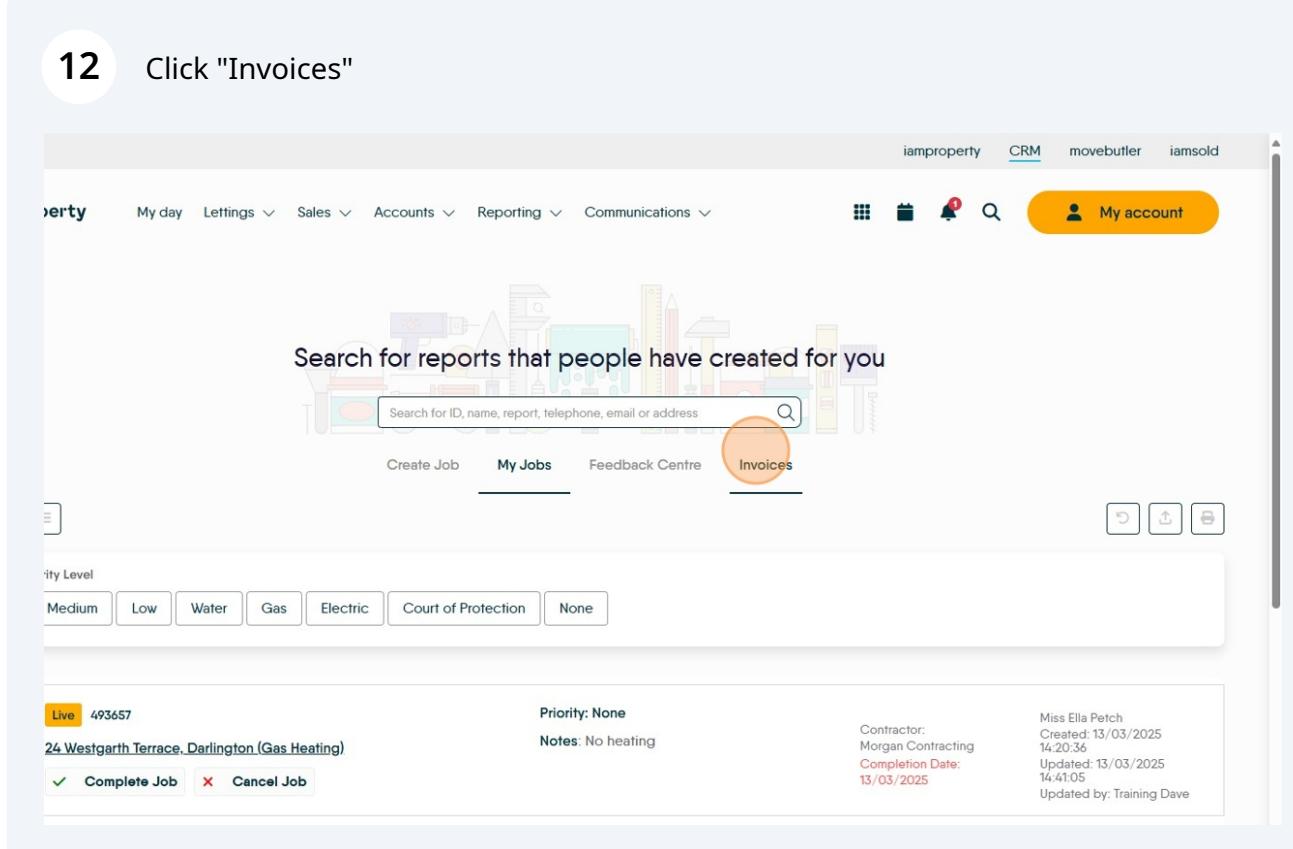
11 Click "Accounts"



The screenshot shows the iamproperty software interface. The top navigation bar includes links for 'My day', 'Lettings', 'Sales', 'Accounts' (which is highlighted with an orange circle), 'Reporting', 'Communications', and user account options. The main content area displays a maintenance job for 'Flat 14 Westpoint, Northumberland Street, Darlington'. The job details include a lightbulb icon, a dropdown for 'Job Fault' (selected: 'Electric, Heating, Lights'), a dropdown for 'Priority Level' (selected: 'Electric'), and a status of 'Completed'. Buttons for 'Sign In' and 'Sign Out' are present, along with a 'Add Invoice' button. To the right, the occupier details are listed: Mrs Audrey Morgan, address: Flat 14 Westpoint, Northumberland Street, Darlington, County Durham, DL3 7HB, UK. The contact information is: zagg.dave@gmail.com, 0789321654. The job is assigned to 'Morgan Contracting'. The creation and update dates are 13/03/2025 14:26:02 and 17/03/2025 08:21:48 respectively. The completion date is 17/03/2025. The price agreed is £0.00, and the authorised budget is £0.00. Below the job details, there are tabs for 'Photos', 'Tenant(s)', 'Offers', 'Landlord(s)', 'Contractor', 'Comments', 'Feedback', 'Invoice', 'Documents', and 'Audit'. A 'Upload Photos' button is also visible.

To View/Check Invoice

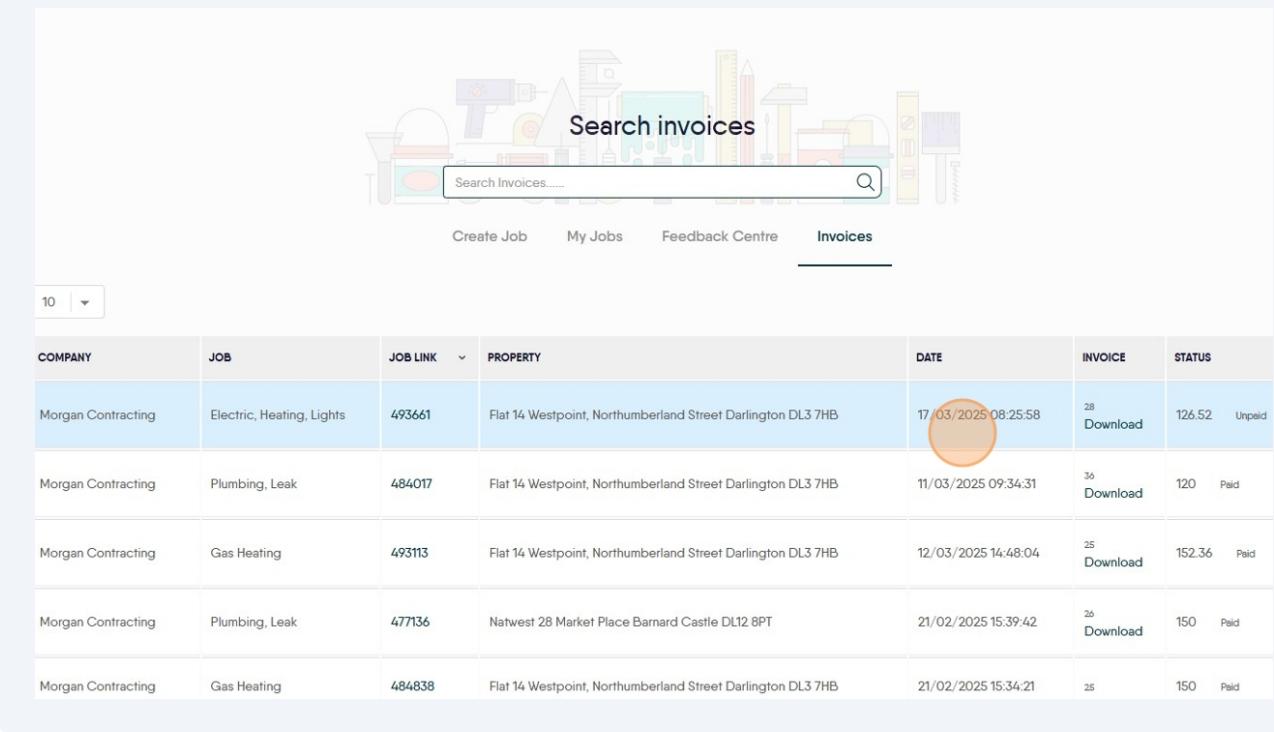
12 Click "Invoices"



The screenshot shows the iamproperty software interface. The top navigation bar includes links for 'My day', 'Lettings', 'Sales', 'Accounts', 'Reporting', 'Communications', and user account options. The main content area features a search bar with the placeholder 'Search for ID, name, report, telephone, email or address'. Below the search bar, there are buttons for 'Create Job', 'My Jobs' (which is highlighted with an orange circle), 'Feedback Centre', and 'Invoices' (which is also highlighted with an orange circle). The interface includes a sidebar with a 'Priority Level' filter showing 'Medium', 'Low', 'Water', 'Gas', 'Electric', 'Court of Protection', and 'None'. At the bottom, a job card is displayed for '24 Westgarth Terrace, Darlington (Gas Heating)'. The job status is 'Live' (493657). The notes indicate 'Priority: None' and 'Notes: No heating'. The contractor is 'Morgan Contracting' (Contractor ID: 13/03/2025 14:20:36, Updated: 13/03/2025 14:41:05, Updated by: Training Dave). There are buttons for 'Complete Job' and 'Cancel Job'.

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	²⁸ Download	126.52 Unpaid
Morgan Contracting	Plumbing, Leak	484017	Flat 14 Westpoint, Northumberland Street Darlington DL3 7HB	11/03/2025 09:34:31	³⁰ Download	120 Paid
Morgan Contracting	Gas Heating	493113	Flat 14 Westpoint, Northumberland Street Darlington DL3 7HB	12/03/2025 14:48:04	²⁵ Download	152.36 Paid
Morgan Contracting	Plumbing, Leak	477136	Natwest 28 Market Place Barnard Castle DL12 8PT	21/02/2025 15:39:42	²⁶ Download	150 Paid
Morgan Contracting	Gas Heating	484838	Flat 14 Westpoint, Northumberland Street Darlington DL3 7HB	21/02/2025 15:34:21	²⁵	150 Paid

Expenses in Accounts

14 Click "Accounts dashboard"

15 Click here.

Invoices 17/02/2025 - 17/03/2025

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

Liabilities

Category	Amount
Reconciled	£ 326,844.92
Unreconciled	£ 30,352.65
Total	£ 313,960.43

Expenses 01/12/2024 - 17/03/2025

Category	Amount
Electric	£ 1,738.90
Gas	£ 6,135.00
Total	£ 8,299.90

16 Click "Jobs Outstanding"

Funds

& Co Client Account
1234567

& Co Held Deposits
5685263

Balance Sheet

Expenses

Invoices

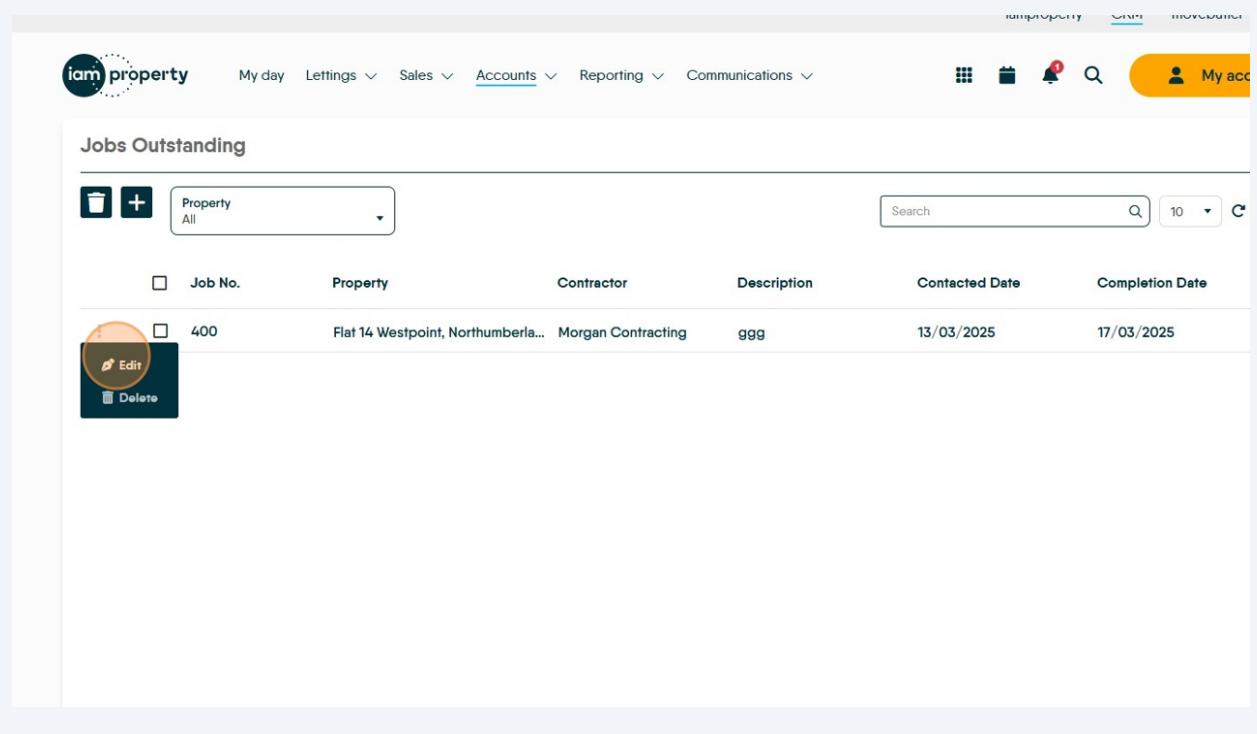
Service Charge Invoice

17 In Jobs Outstanding Click here.

Jobs Outstanding

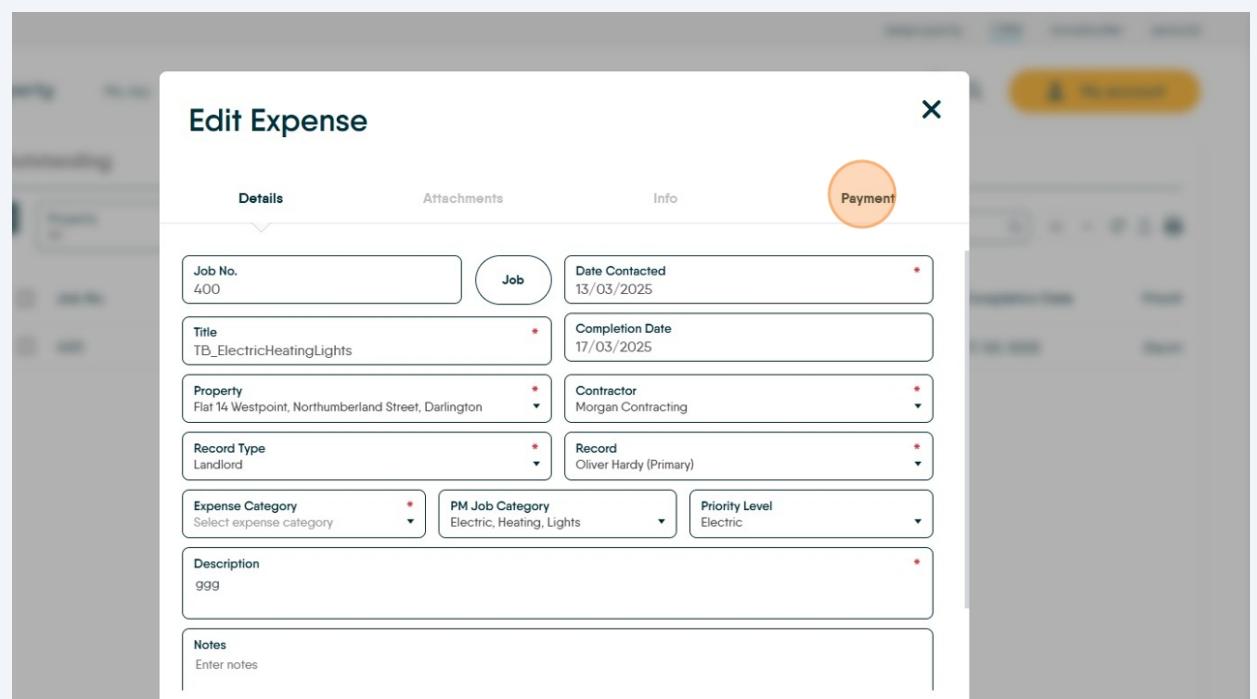
Job No.	Property	Contractor	Description	Contacted Date	Completion Date
400	Flat 14 Westpoint, Northumberland...	Morgan Contracting	999	13/03/2025	17/03/2025

18 Click "Edit"



The screenshot shows the 'Jobs Outstanding' page in the iam property software. At the top, there are navigation links: My day, Lettings, Sales, Accounts (which is underlined, indicating it's the active page), Reporting, and Communications. On the right, there are icons for dashboard, calendar, notifications, search, and account management. The main area is titled 'Jobs Outstanding' and shows a table with columns: Job No., Property, Contractor, Description, Contacted Date, and Completion Date. One row is selected, showing Job No. 400, Property 'Flat 14 Westpoint, Northumberland Street, Darlington', Contractor 'Morgan Contracting', Description '999', Contacted Date '13/03/2025', and Completion Date '17/03/2025'. The 'Edit' button for this row is highlighted with a red circle.

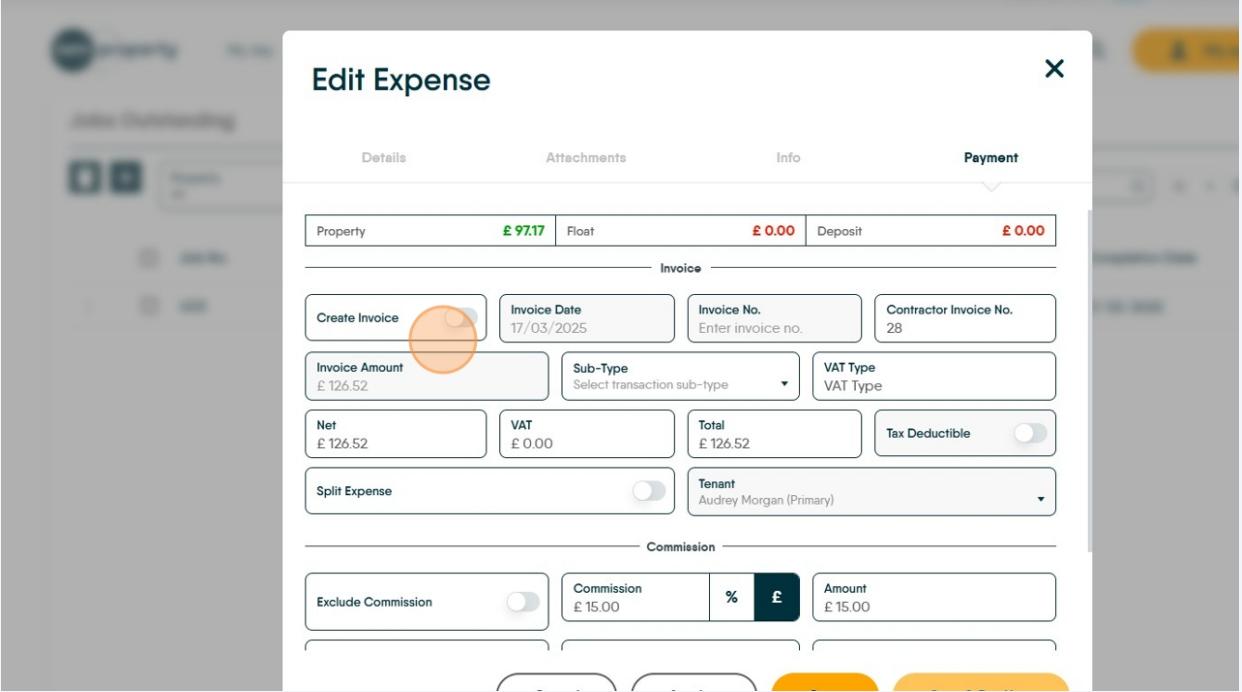
19 In the Edit Expense screen. Click "Payment"



The screenshot shows the 'Edit Expense' dialog box. The top navigation tabs are 'Details', 'Attachments', 'Info', and 'Payment' (which is highlighted with a red circle). The 'Details' tab is active and displays the following fields: Job No. (400), 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 (999), and 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.



The screenshot shows the 'Edit Expense' modal with the 'Invoice' tab selected. The top navigation bar includes 'Details', 'Attachments', 'Info', and 'Payment'. The 'Invoice' section contains the following fields:

- Property:** £ 97.17
- Float:** £ 0.00
- Deposit:** £ 0.00
- Create Invoice:** (button with a circular icon)
- 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:** (toggle switch)
- Split Expense:** (toggle switch)
- Tenant:** Audrey Morgan (Primary)
- Commission:** (group of fields)
 - Exclude Commission:** (toggle switch)
 - Commission:** £ 15.00
 - Commission Type:** % (selected)
 - Amount:** £ 15.00