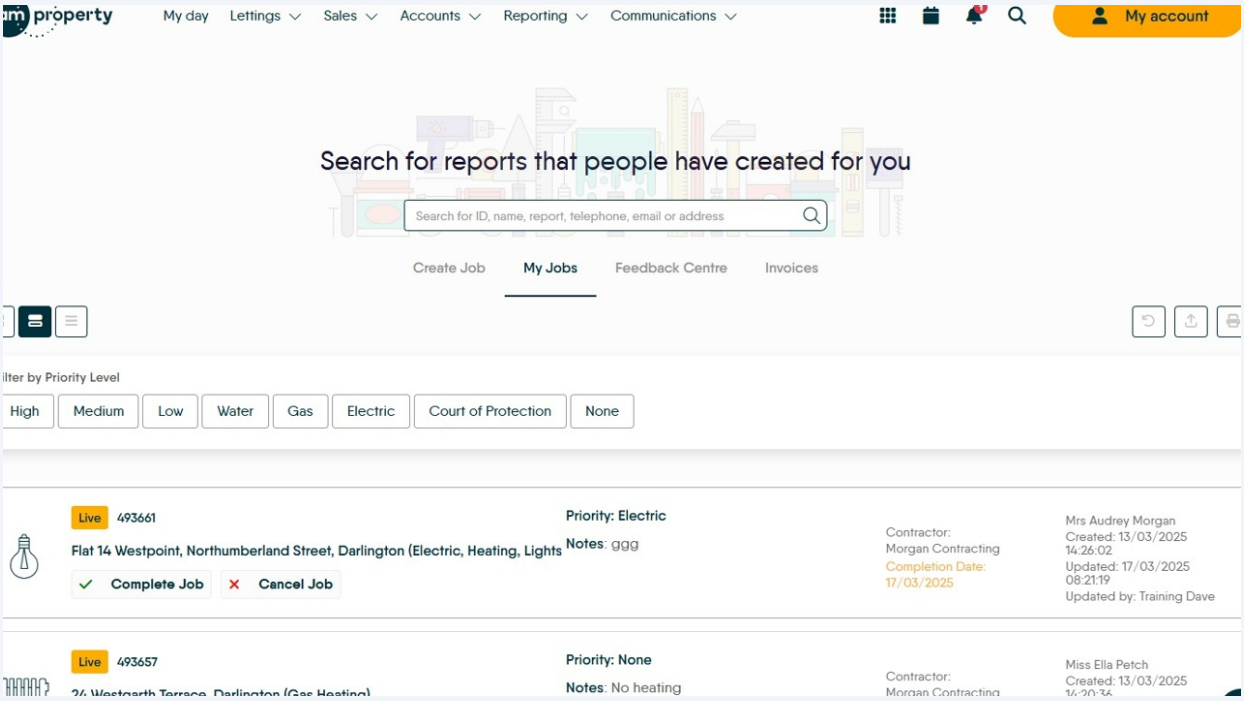
Property Management - Adding an Invoice and Updating Expenses in CRM

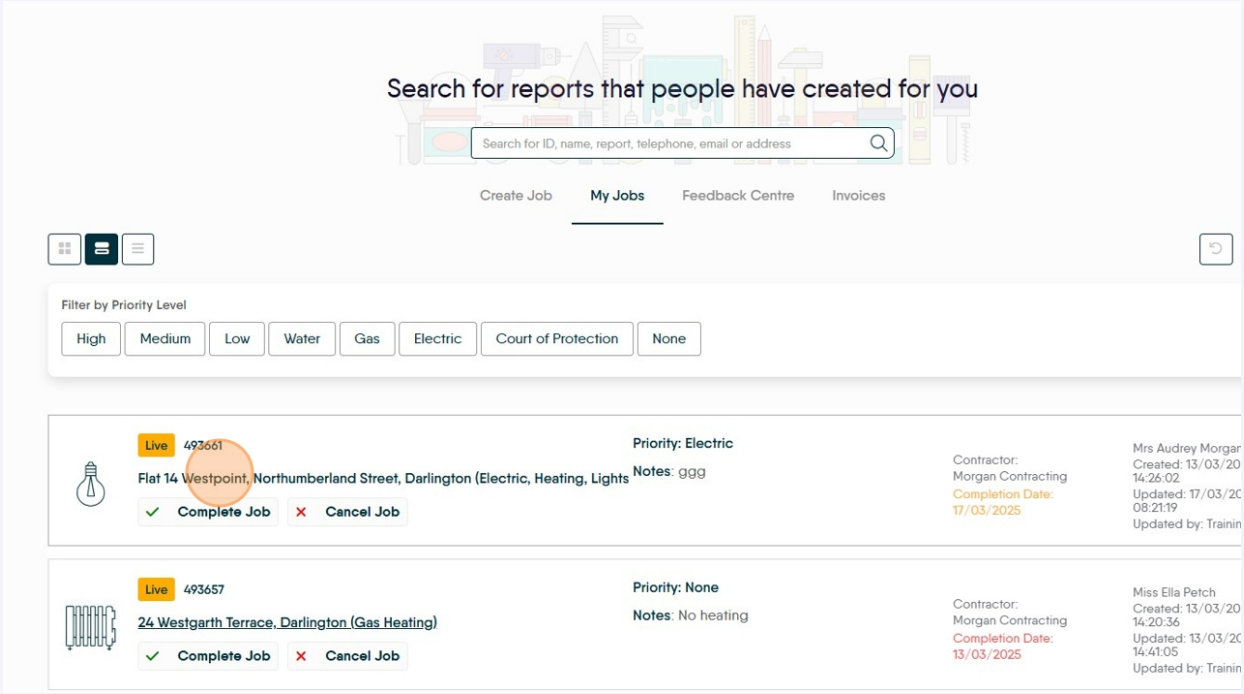
This guide provides essential instructions for effectively managing property-related invoices and tasks within the iamproperty CRM.

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

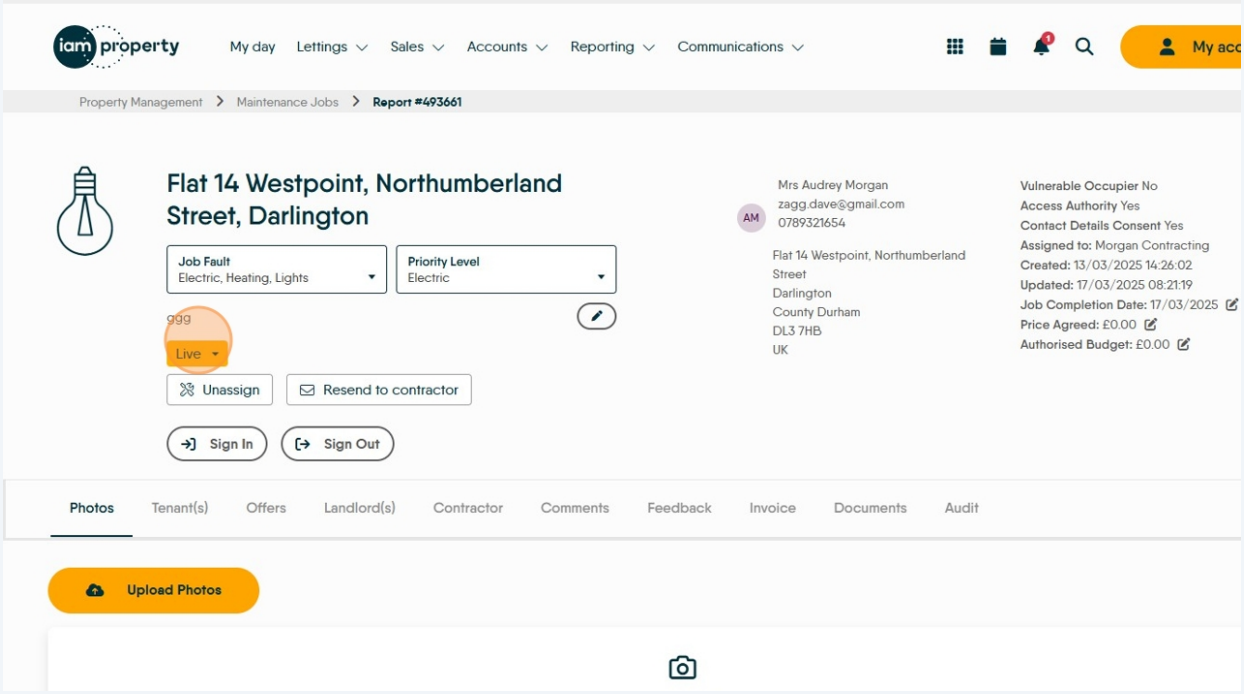
1 Navigate to https://crm.iamproperty.com/Toolbox/TaskList



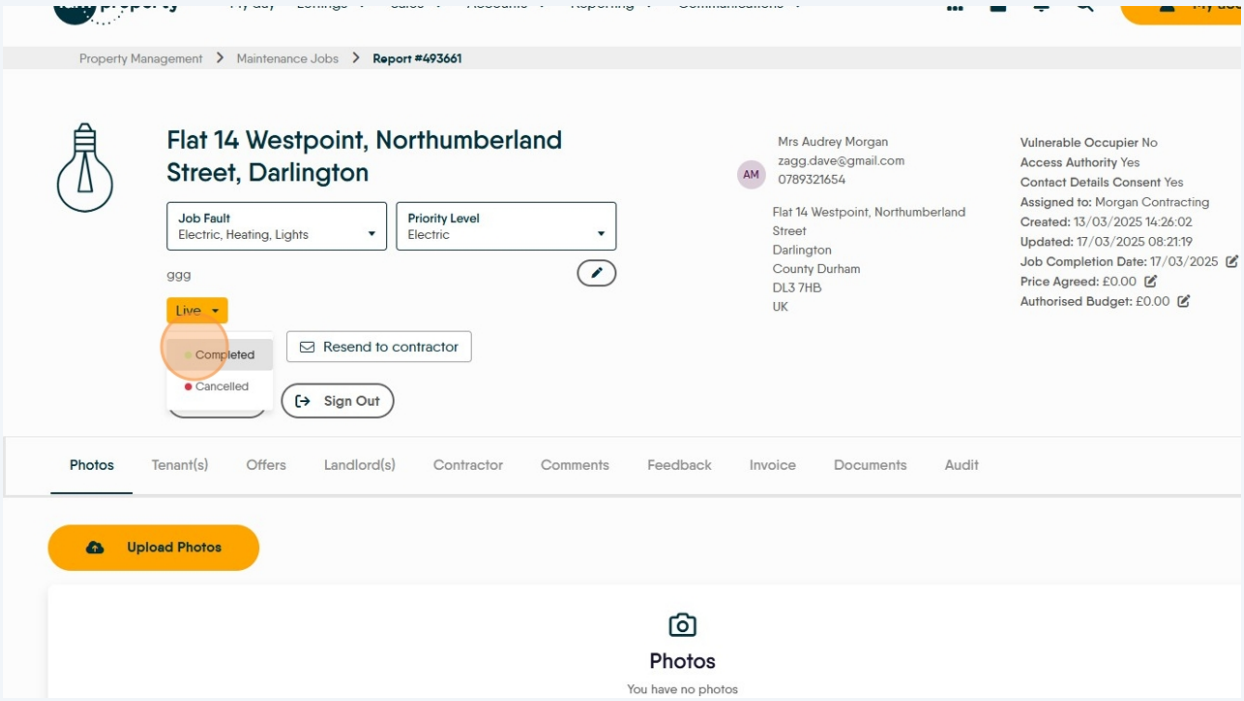
2 Select the Property you are adding the invoice to. Clicking on the Property address will take you into the record.



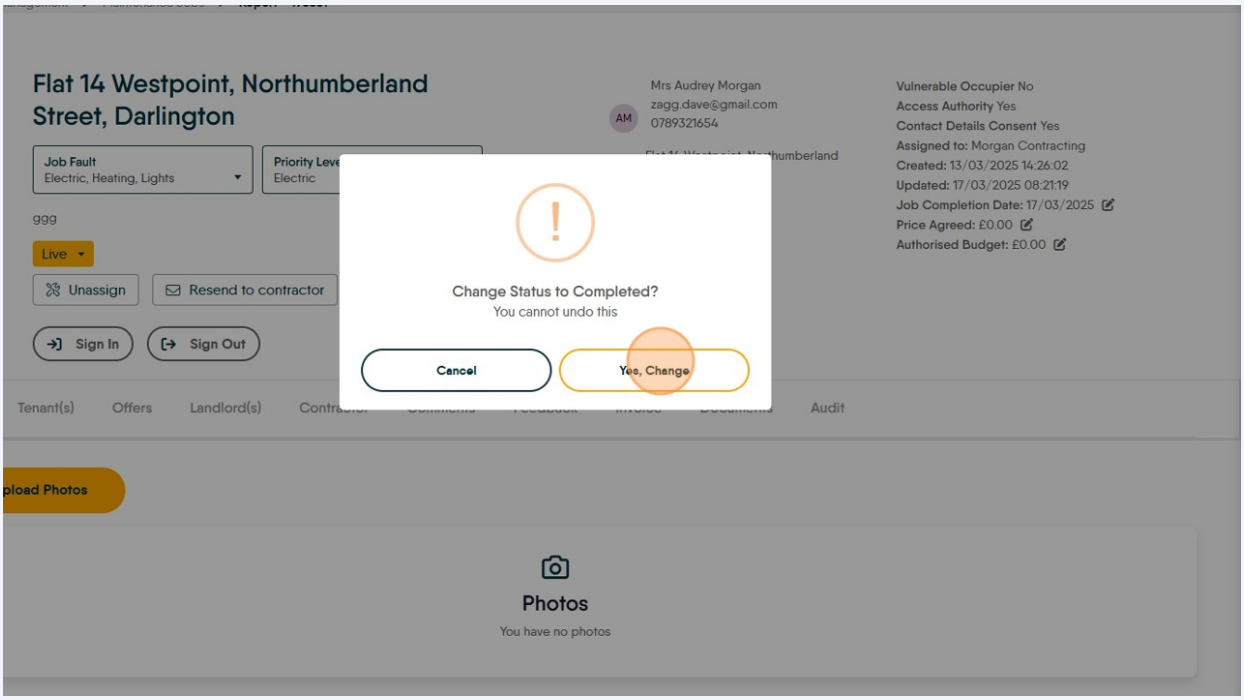
3 Click "Live" and change the option to Completed



4 Click "Completed"

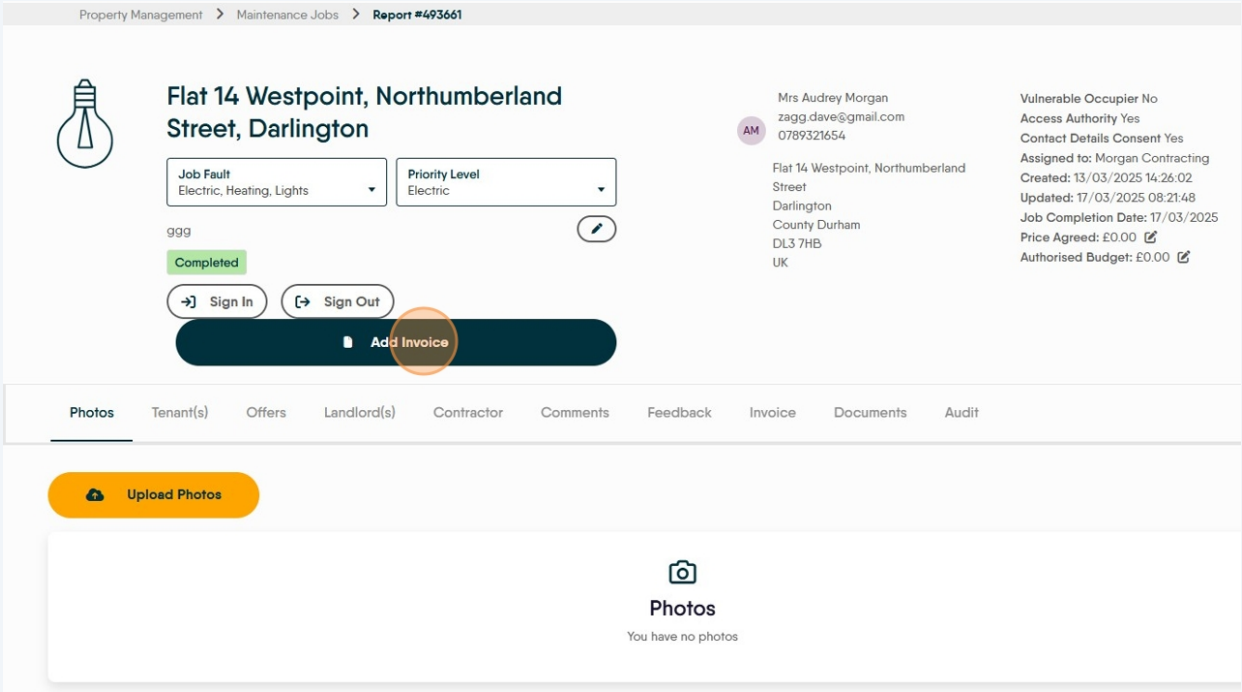


5 Click "Yes, Change"

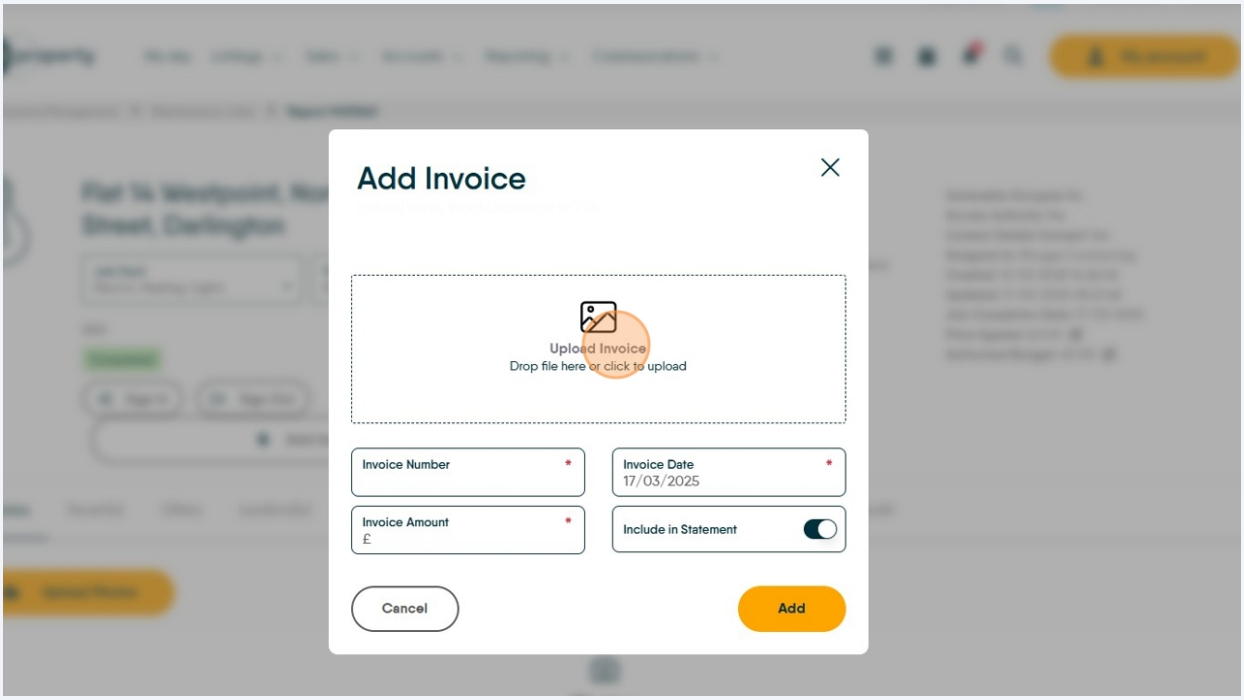


Tip! You may need to refresh the screen at this point to show the 'Add Invoice' option

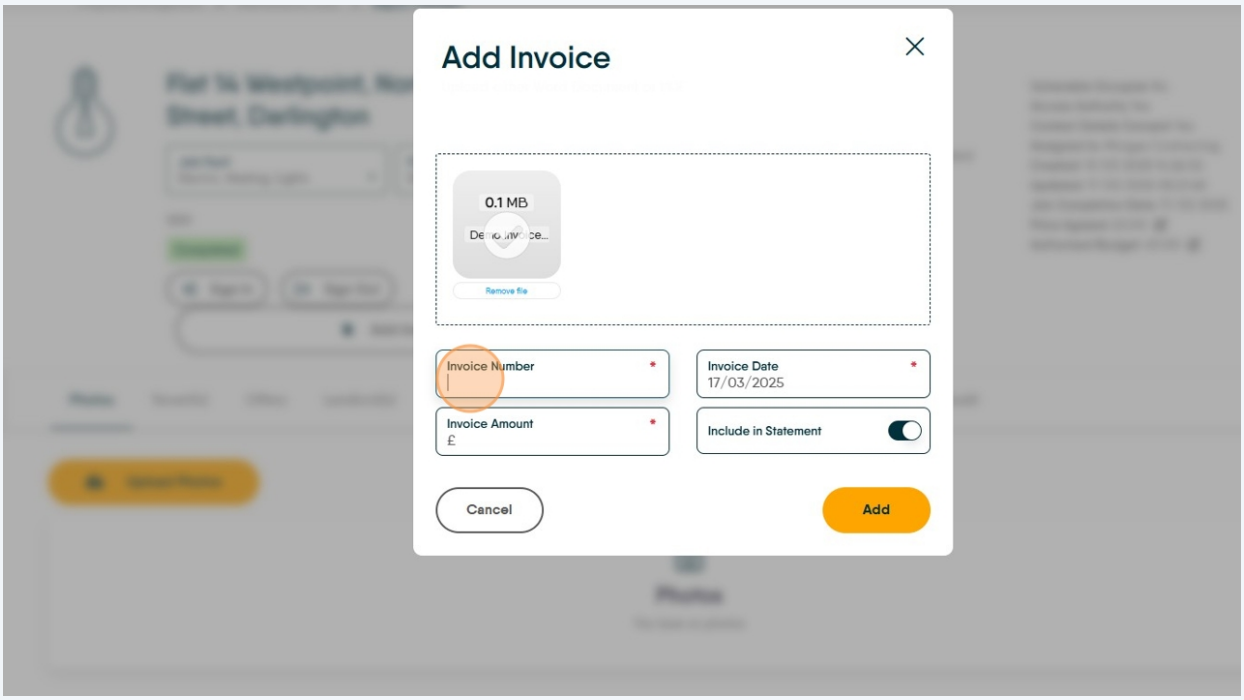
6 Click "Add Invoice"



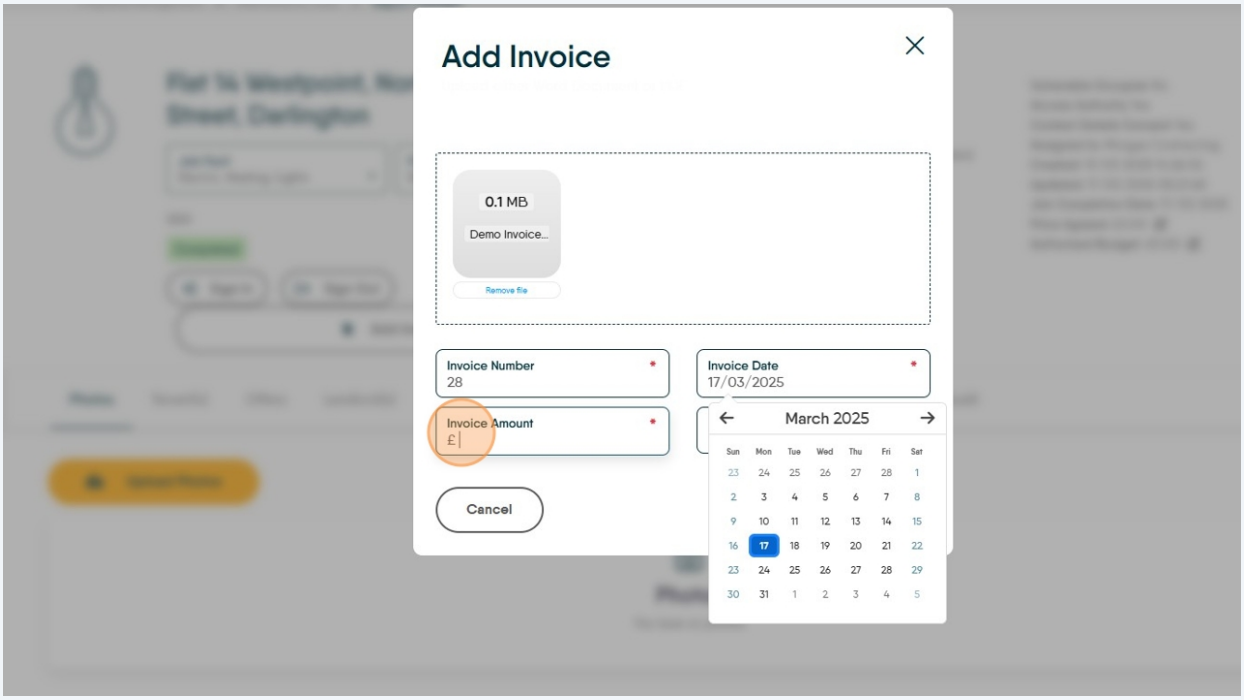
7 Click "Upload Invoice" and find the invoice to add. You can also drag the invoice document directly from your email (if the invoice was emailed to you)



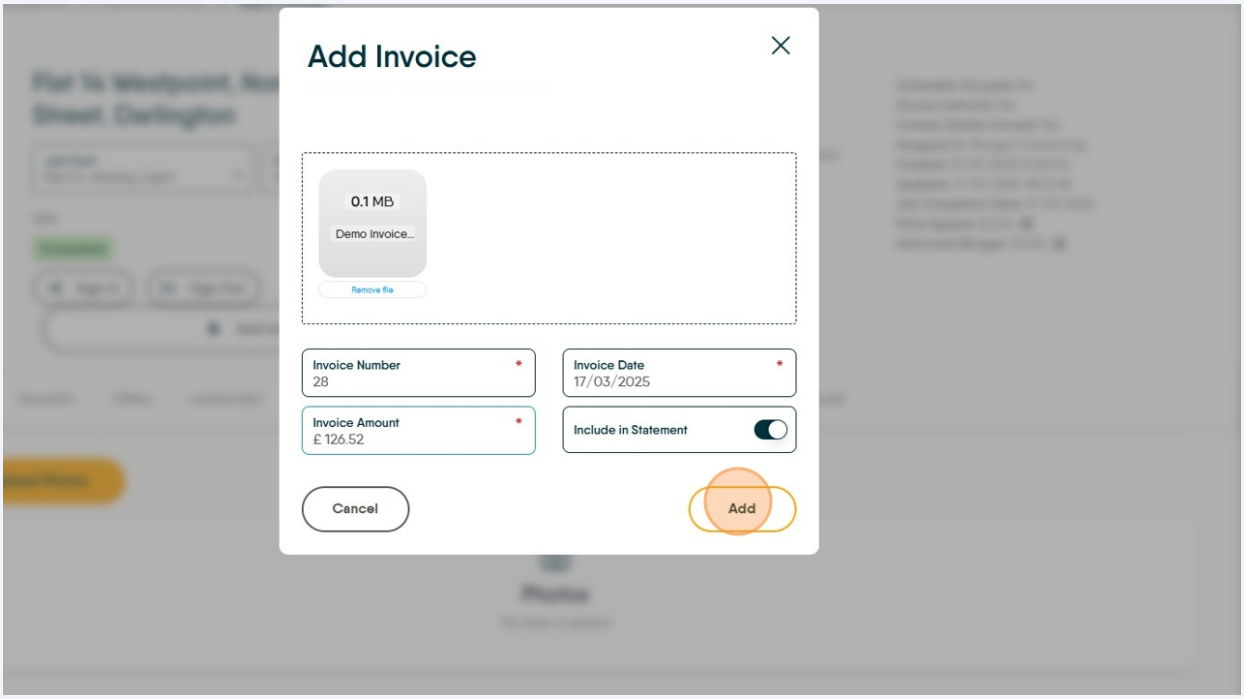
8 Click this text field. Add the Contractor Invoice Number



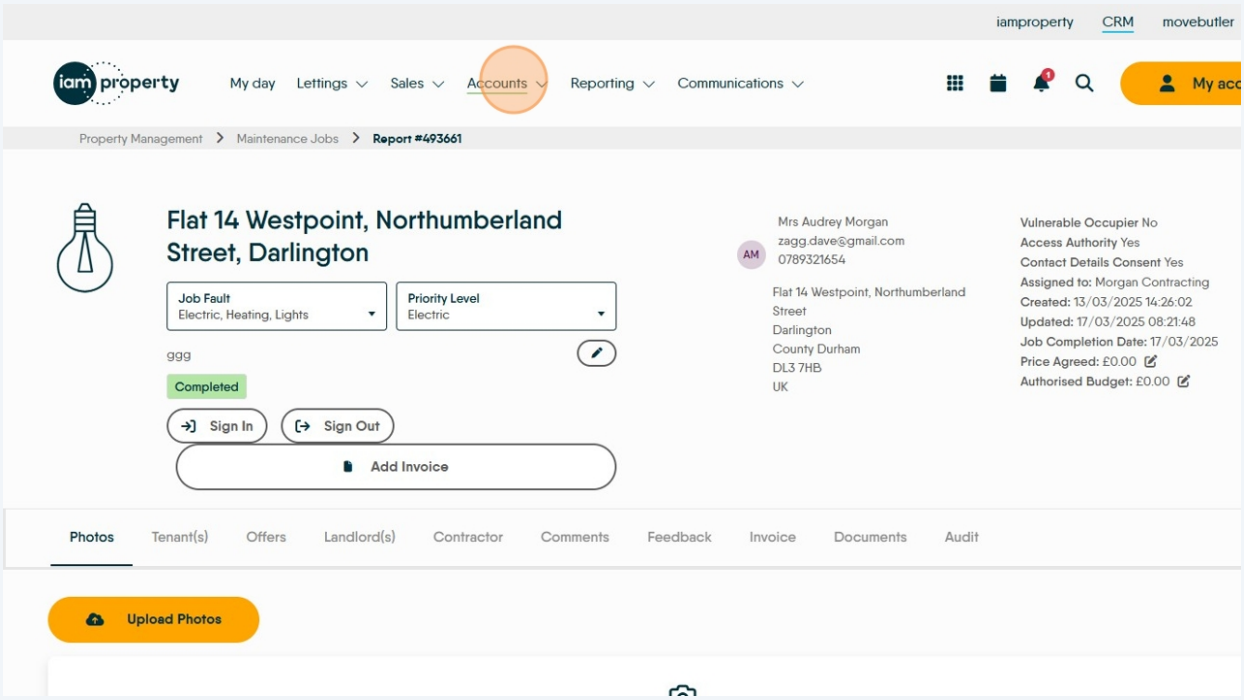
9 Click this text field and add the Invoice amount, check the date in 'Invoice Date' is correct.



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

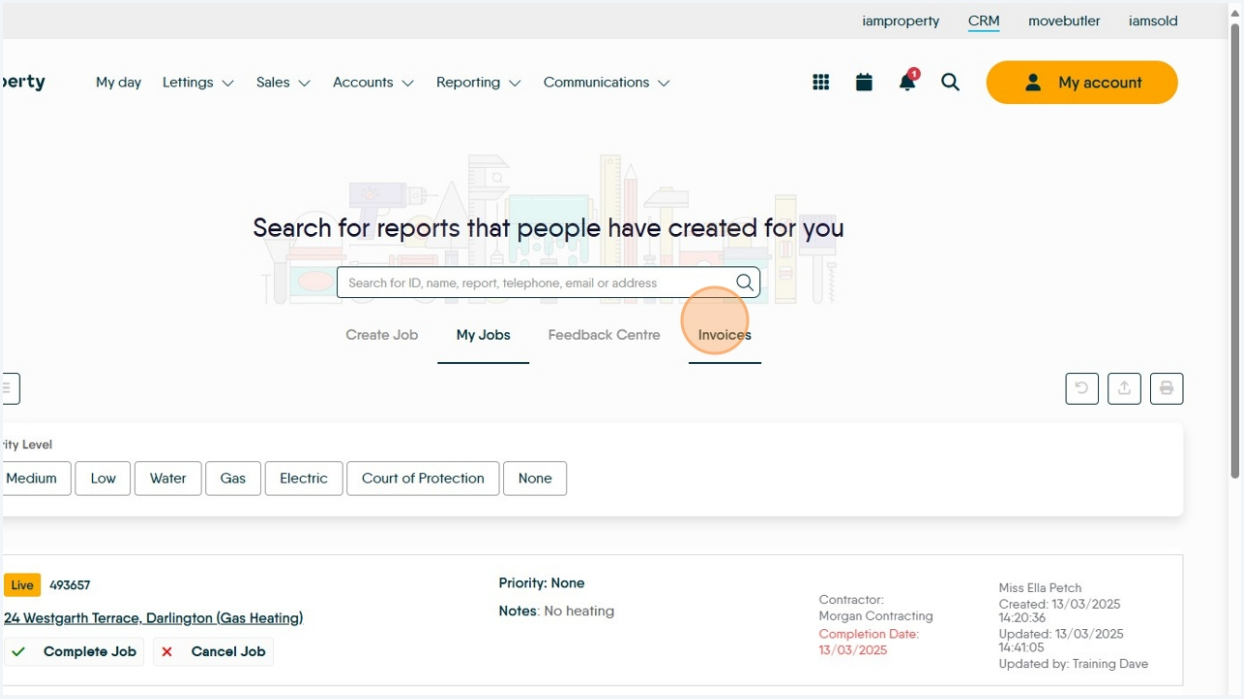


11 Click "Accounts"

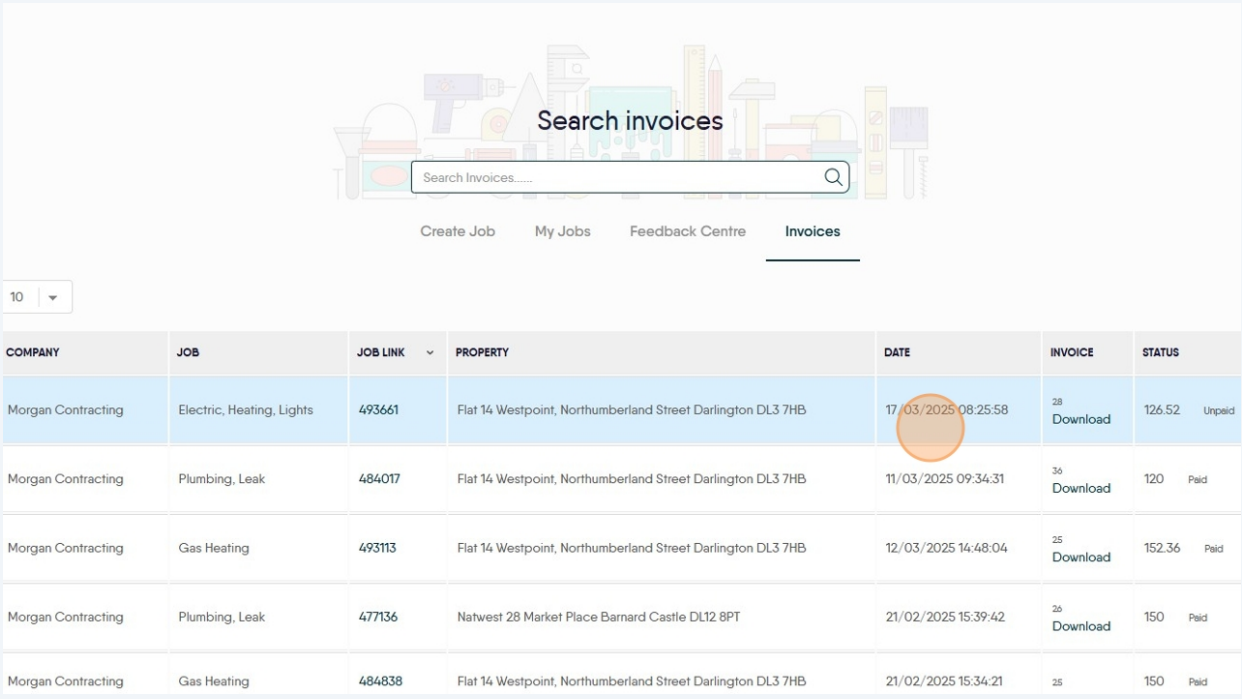


To View/Check Invoice

12 Click "Invoices"

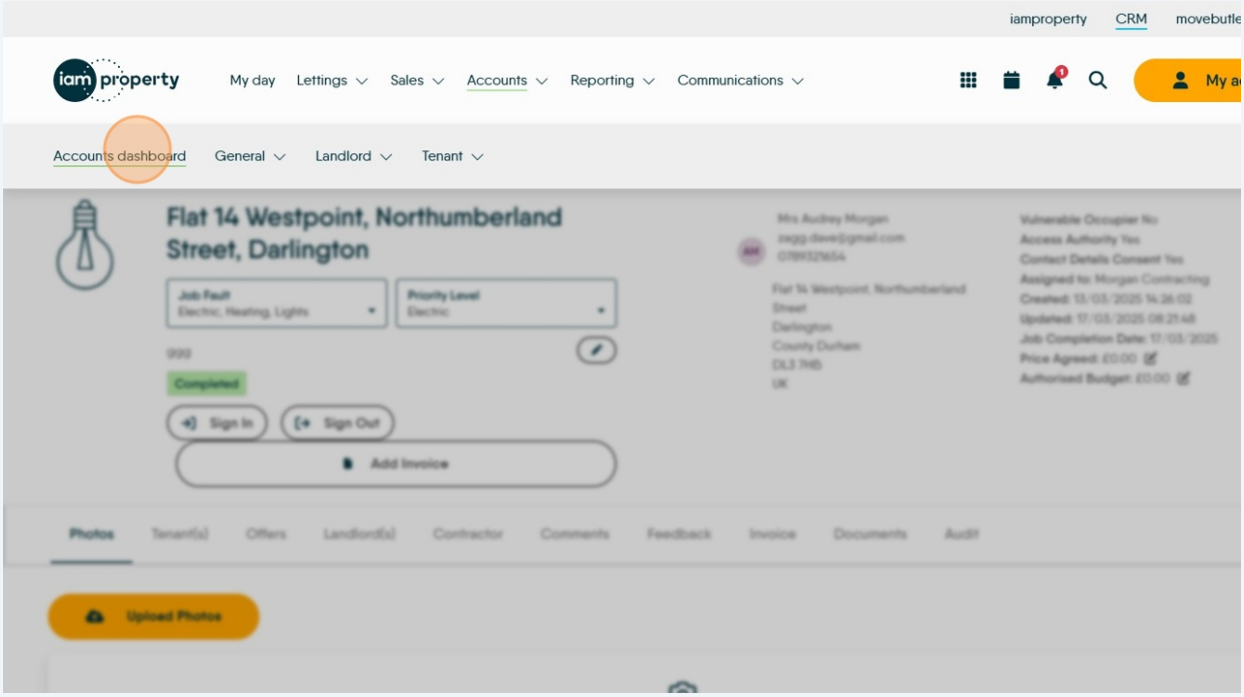


13 This screen shows all the completed jobs in Property Management. If 'Download' is shown then an invoice is added and can be viewed/downloaded.

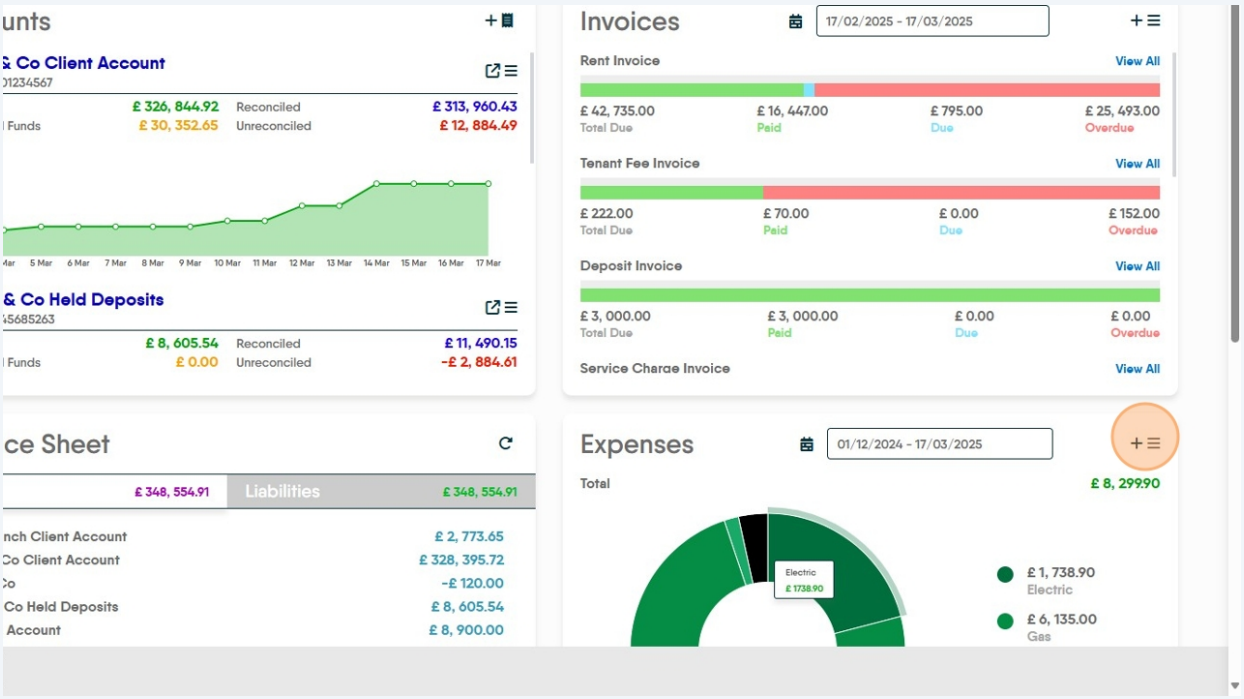


Expenses in Accounts

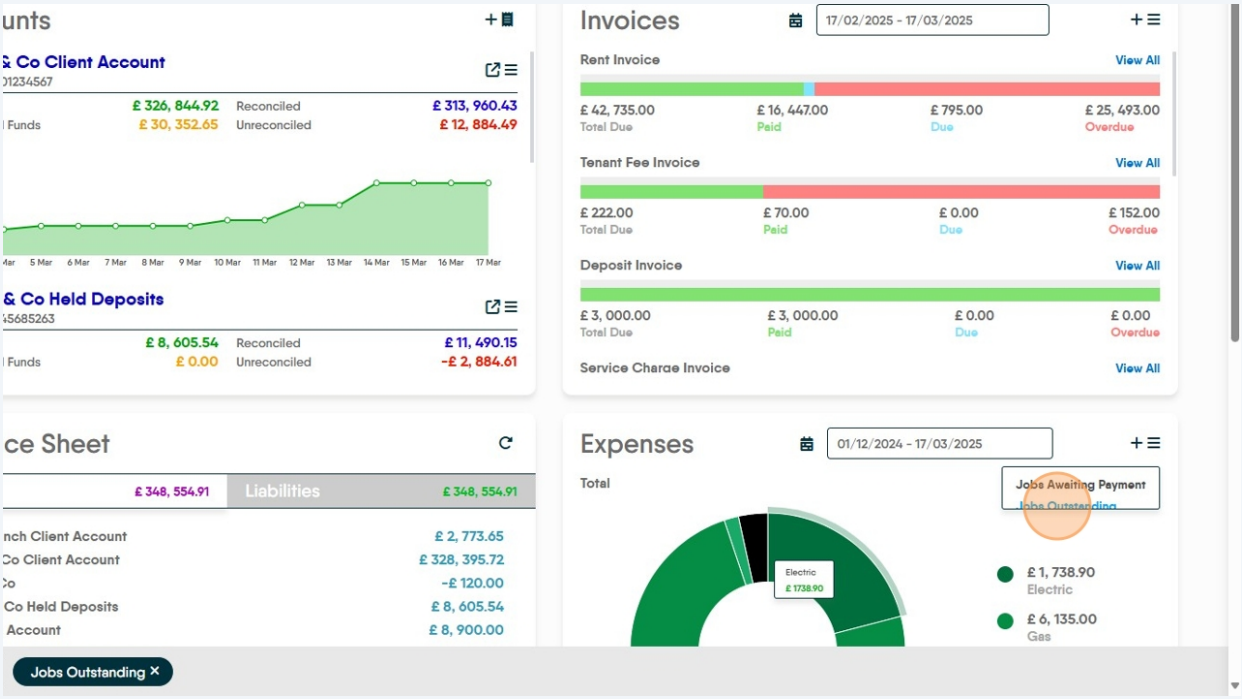
14 Click "Accounts dashboard"



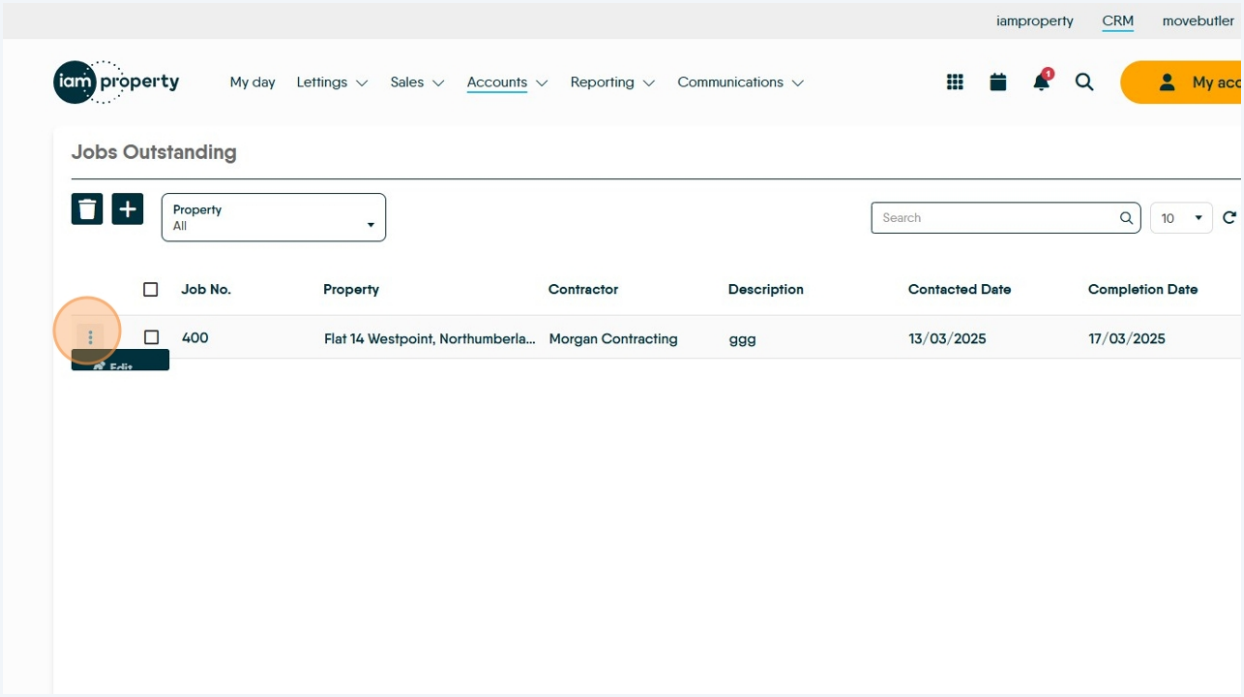
15 Click here.



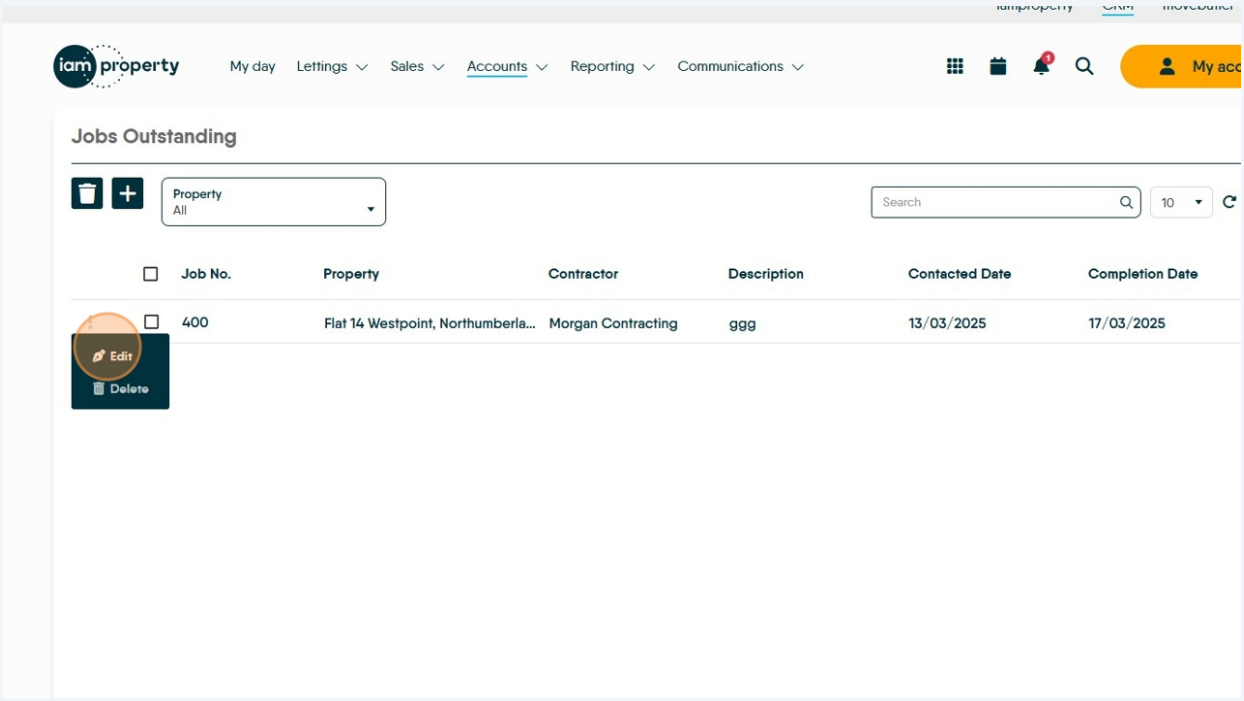
16 Click "Jobs Outstanding"



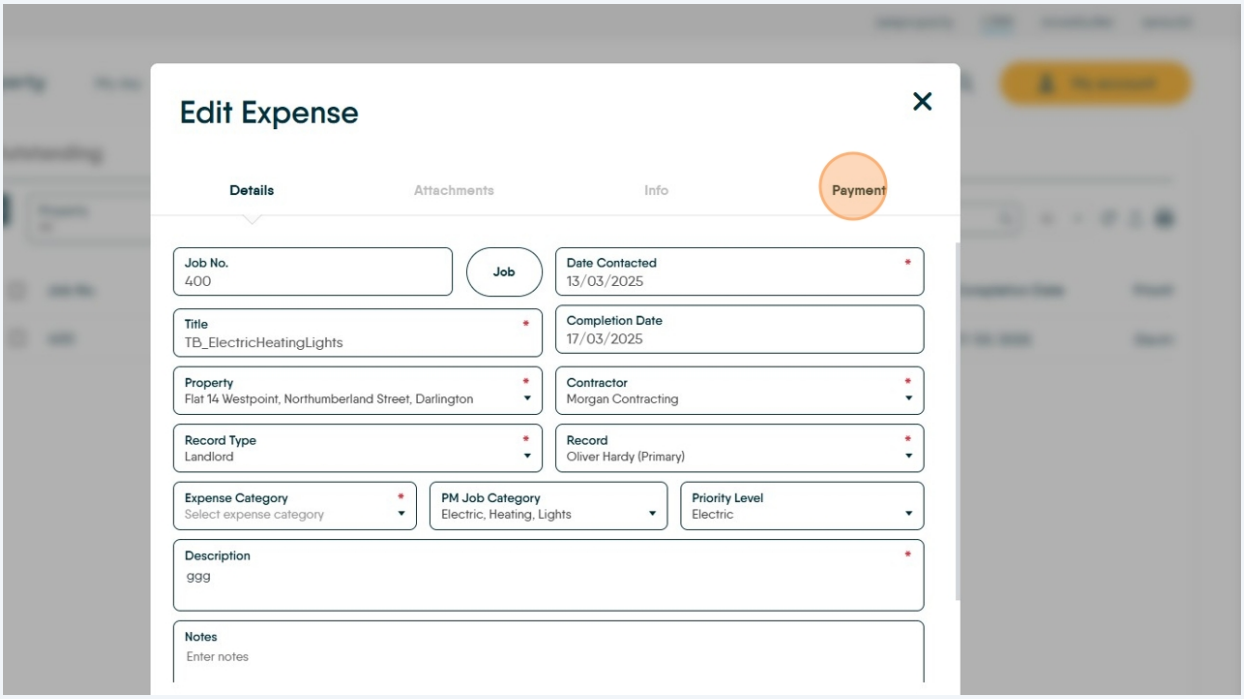
17 In Jobs Outstanding Click here.



18 Click "Edit"



19 In the Edit Expense screen. Click "Payment"



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.