

# Adding a New Contractor Record in CRM



This guide provides a straightforward method for adding a new contractor record in the CRM system, ensuring that users can efficiently manage contractor information.

By following the step-by-step instructions, users can easily navigate through the CRM interface and input essential details like company name and contact information.

Viewing this guide will streamline the process, saving time and minimising errors when updating contractor records.



There are 2 main ways to add a contractor record. From the My Day screen and from the 'Bento' Menu, adding the record is the same from either way.

1

Navigate to <https://crm.iamproperty.com/MyDay>

## From the MyDay screen

## 2 Click "Add New Record"

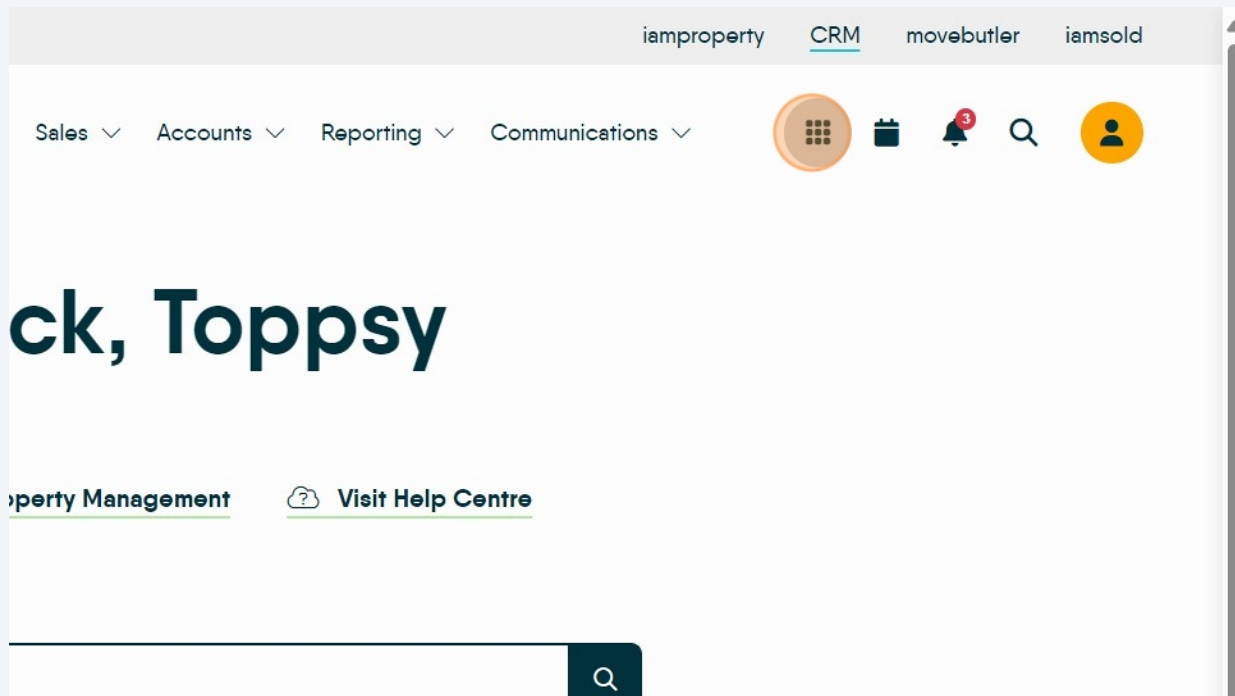
The screenshot shows the ian property CRM dashboard. The top navigation bar includes the ian property logo, a menu with 'My day', 'Lettings', 'Sales', 'Accounts', 'Reporting', and 'Communications', and user links for 'CRM' and 'movebutler'. Below the navigation bar, there are three buttons: '+ Add New Record' (highlighted with an orange circle), 'View Property Management', and 'Visit Help Centre'. A search bar labeled 'Search all records' is positioned below these buttons. The main content area is divided into two sections: 'Today's events' and 'My tasks'. The 'Today's events' section shows a table with columns 'Time' and 'Name', containing one entry: '12:00' and 'Test test'. The 'My tasks' section shows a table with columns 'Status', 'Name', 'Priority', 'Start date', and 'Due date', containing five entries: 'Not Started', 'Call Landlord', 'High', '15/Nov/2024', '15/Nov/2024'; 'Not Started', 'test', 'High', '27/Nov/2024', '27/Nov/2024'; 'Not Started', 'Call Landlord', 'Medium', '12/Dec/2024', '12/Dec/2024'; 'Not Started', 'Call back', 'High', '03/Jan/2025', '03/Jan/2025'; and 'Not Started', 'Make Tea', 'High', '07/Jan/2025', '07/Jan/2025'.

## 3 Click "Contractor"

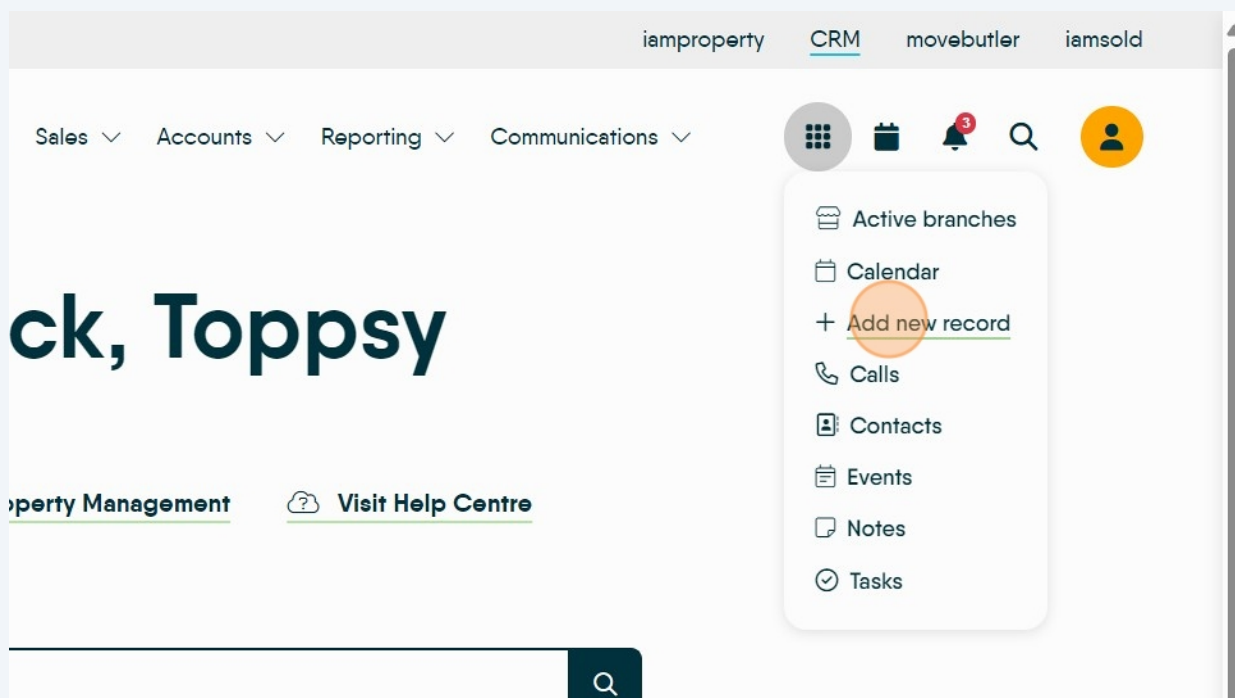
The screenshot shows the 'Add New Record' modal. The modal has a title 'Add New Record' and a close button. Below the title, there is a section 'Select record type' with a grid of options: 'Sales Applicant', 'Lettings Applicant', 'Sales Property', 'Lettings Property', 'Landlord', 'Portfolio', 'Vendor', 'Tenancy', 'Contractor' (highlighted with an orange circle), and 'Maintenance job'. The 'Contractor' option is the only one with a dark blue arrow icon. The modal is overlaid on a blurred background of the dashboard.

From the Bento Menu

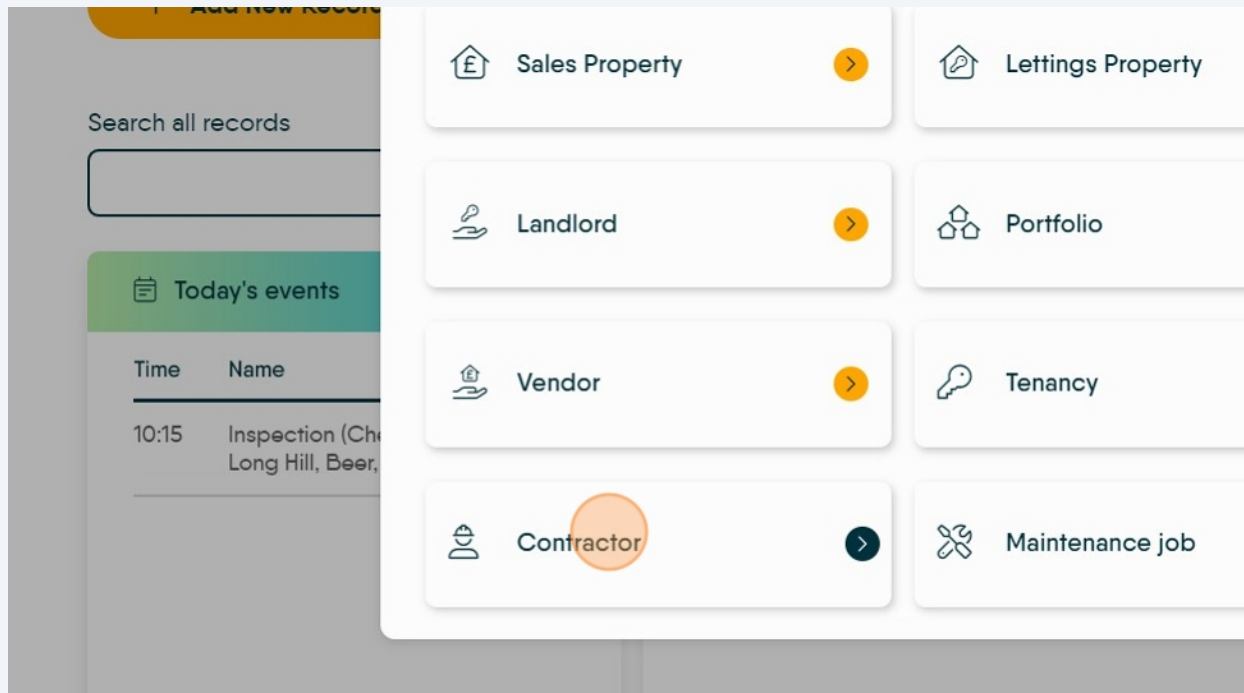
4 Click On the 'Bento' menu



5 Click "Add new record"



6 Scroll down to the "Contractor"



## Creating the Contractor Record

7

Scroll down to the company information area and fill in the info as required (minimum 2 mandatory fields) but fill in as much as you have.

Reference:
Status: Active
Neg

Company information

Company name \*

Website

Phone number

Work phone

Mobile phone

Email address \*

Public liability required? ☐

Expiry date  
02/12/2024

CLEAR

Services provided

Select services

Select branches serviced

Select All

Contact notes

8

Click this search field and fill in the services that they provide

Website

Work phone

Email address  
HC@hotmail.com

Expiry date  
02/12/2024

CLEAR

Services provided

Select services \*

Select branches serviced

Select All

Contact notes

Status: Active
Negotiator: Topsy Turvey

5

Website

Work phone

Email address  
HC@hotmail.com

Expiry date  
02/12/2024

CLEAR

Edit manually

### Services provided

Select services

Electricity

Gas

Water

Handy Man

Gardening

Damp Proofing

Contact Notes

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🔗

9

Click this search field and look at the branch they will be servicing for example Click "Turvey & Co"

Website

Work phone

Email address  
HC@hotmail.com

Expiry date  
02/12/2024

CLEAR

Edit manually

### Services provided

Select services

Damp Proofing X

Select branches serviced

Select All

### Contact notes

Contact Notes

Status: Active      Negotiator: Toppsy Turvey

Website

Work phone

Email address  
HC@hotmail.com

Expiry date  
02/12/2024      CLEAR

henry & Co  
Morgan & Co  
Morgan&Co MB  
Reports & Letters  
Turvey & Co  
Wilton Branch

Select branches serviced

Select All

10

Click this text field and add the contractors address. Add the Postcode and then click the magnifying glass icon.

Then select the address from the menu, or the closest address and use the edit option to edit the address.

HC@hotmail.com

Public liability required? ☐

Expiry date  
02/12/2024      CLEAR

Contractor address      Edit manually

Address type  
Contact

Postcode

Address

Contact notes

Contact Notes

**B** **I** **U**

Enter notes here...


HC@hotmail.com

ability required? ☐

Expiry date  
02/12/2024 CLEAR

or address

type

Postcode  
EN7 5DX 

Edit manually

Turvey & Co X

Select All


Contact notes

Contact Notes

B

I

U



Enter notes here...

mobile phone

Email address  
HC@hotmail.com

-- Select Address --

1 Franklin Avenue, Cheshunt, Waltham Cross, Hertfordshire, EN75DX, UK

2 Franklin Avenue, Cheshunt, Waltham Cross, Hertfordshire, EN75DX, UK

3 Franklin Avenue, Cheshunt, Waltham Cross, Hertfordshire, EN75DX, UK

4 Franklin Avenue, Cheshunt, Waltham Cross, Hertfordshire, EN75DX, UK

5 Franklin Avenue, Cheshunt, Waltham Cross, Hertfordshire, EN75DX, UK

Address

-- Select Address --

Turvey & Co X


Contact notes

Contact Notes

B

I

U



Enter notes here...



- 11 Click here to save the data and move on with the Contractor setup.

The screenshot shows a web application interface for contractor management. At the top, a blue header bar contains the contractor's name 'Morgan Contracting', email 'zagg.dave@gmail.com', phone '07854693995', and a 'SUSPEND' button. Below the header, the address '16 Yew Tree Close, Hurworth, Darlington' is displayed. A navigation sidebar on the left shows '40' and '0' next to 'Users'. The main form area is divided into several sections: 'Reference:' and 'Status: Active' at the top; 'Company Information' with fields for Company Name, Website, Phone Number, Work phone, Mobile phone, Email Address, Public Liability Required?, and Expiry Date; 'Services Provided' with 'Select Services' (Handy Man, Gardening, Electricity) and 'Select Branches Serviced' (Henry & Co, Morgan & Co, Turvey & Co); 'Contractor Address' with 'Address type' (Contact) and 'Postcode' (DL2 2HX); and 'Contact Notes' with a 'Save Changes' button and a lock icon. An orange 'Select All' button is located below the 'Select Branches Serviced' section.



Tip! to the left side of the screen you will now see more menu options, work down and complete as much of these as possible.

- 12 Click "Checklist". If enabled this will show the checklist for a Contractor record. Click here.

iam property

My day Lettings Sales Accounts Reporting Communications

iamproperty CRM movebutle

Jobs Paid 40

Live Jobs 0

Last Contacted

Details

Checklist

My Jobs

Financial

Contractor Users

Documents

Journal

AUDIT

Company Information

Company Name Morgan Contracting Website

Phone Number 07854693995 Work phone

Mobile phone 07854693995 Email Address zagg.dave@gmail.com

Public Liability Required? Expiry Date 18/12/2024

Services Provided

Select Services

Handy Man Gardening Electricity

Select Branches Serviced

Henry & Co Morgan & Co Turvey & Co

Select All

Contractor Address

Address type Contact Postcode DL2 2HX

Address 16 Yew Tree Close, Hurworth, Darlington, Durham, DL2 2HX, UK

Edit Manually

Contact Notes

Contact Notes

B I U

Enter notes here...

iam property

My day Lettings Sales Accounts Reporting Communications

iamproperty CRM movebutle

Jobs Paid 40

Live Jobs 0

Last Contacted

Details

Checklist

My Jobs

Financial

Contractor Users

Documents

Journal

AUDIT

MC

Morgan Contracting

zagg.dave@gmail.com

07854693995

SUSP

16 Yew Tree Close, Hurworth, Darlington

Phone

WhatsApp

Calendar

Messages

Email

Reference:

Status: Active

Negotiator: Training Dave

New contractor setup

✓

VAT Registration Seen- Copy on Record

Checked by David-George Morgan on 02/11/2023 09:51

Add note

6 of 6 checked

✓

Contract Signed

Checked by David-George Morgan on 02/11/2023 09:51

Add note

6 of 6 checked

✓

Commission Agreed

Checked by David-George Morgan on 02/11/2023 09:51

Add note

6 of 6 checked

✓

Financial Details set-up?

Checked by David-George Morgan on 02/11/2023 09:51

Add note

6 of 6 checked

10

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Click "My Jobs" this will display a list of the Jobs allocated to that contractor, the details and if they have been paid or not.

At the top left of the screen you can also see how many jobs have been paid and how many live jobs the contractor currently has assigned.

The screenshot displays the 'My Jobs' page in the iamproperty CRM. The top navigation bar includes links for 'My day', 'Lettings', 'Sales', 'Accounts', 'Reporting', and 'Communications'. The left sidebar contains various menu items, with 'My Jobs' highlighted. The main content area shows a summary of '134 Jobs' and a table of job details. The table has columns for Status, Job Type, Property, and Amount. A summary box on the left indicates 'Jobs Paid: 40' and 'Live Jobs: 0'. A filter sidebar on the left allows users to sort and filter jobs by transaction range, period, status, and type.

Status	Job Type	Property	Amount
Awaiting Payment	Bathroom Door	7 Yew Tree Close, Hurworth, Darlington	£31.90
<b>JOB NO</b> 479214 <b>INVOICE NO</b> CRM - 513 <b>COMPLETION DATE</b> 11/02/2025 <b>PAYMENT DATE</b> 11/02/2025 <b>DESCRIPTION</b> Bathroom door broken			
Paid	Smell Gas	8 Carlton Moor Crescent, Darlington	£14.83
Paid	Plumbing, Leak	63 Woodland Road, Darlington	£300.00
Paid	Gas Heating	24 Westgarth Terrace, Darlington	£53.54
Paid	Gas Heating	Flat 14 Westpoint, Northumberland Street, Darlington	£148.22

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Click "Financial" this will allow you to add the payment details for your contractors

The screenshot displays the 'Financial' page in the iamproperty CRM. The top navigation bar includes links for 'My day', 'Lettings', 'Sales', 'Accounts', 'Reporting', and 'Communications'. The left sidebar contains various menu items, with 'Financial' highlighted. The main content area shows a 'New contractor setup' form. The form has fields for Reference, Status, and Negotiator. A summary box on the left indicates 'Jobs Paid: 40' and 'Live Jobs: 0'. A filter sidebar on the left allows users to sort and filter jobs by transaction range, period, status, and type.

Reference	Status	Negotiator
	Active	Training Dave

**New contractor setup**

- ☒ VAT-Registration Seen: Copy on Record Checked by David-George Morgan on 02/11/2023 09:51
- ☒ Contract Signed Checked by David-George Morgan on 02/11/2023 09:51
- ☒ Commission Agreed Checked by David-George Morgan on 02/11/2023 09:51
- ☒ Financial Details set up? Checked by David-George Morgan on 02/11/2023 09:51
- ☒ Public Liability Insurance Copy on Record Checked by David-George Morgan on 02/11/2023 09:51

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In the Financial screen add the "Account Name", the "Bank Name", the "Account Number", the "Sort Code", the "Payment Method" e.g. "BACS", the "Bank reference" adding <INV> into this field adds the Contractor invoice number to the payment for easy identification of payments.

If you are NOT paying your contractor via BACS select the appropriate method e.g. cheque, bank transfer etc as this will create the correct payment method in the CRM Accounts module.

The screenshot shows the 'Financial' screen in the 'iam property' CRM. The left sidebar includes links for 'Jobs Paid' (40), 'Live Jobs' (0), 'Last Contacted', 'Details', 'Checklist', 'My Jobs', 'Financial' (selected), 'Contractor Users', 'Documents', 'Journal', and 'AUDIT'. The main content area is titled 'Bank Information' and contains six fields arranged in a 2x3 grid:

- Account Name:** Morgan Contracting
- Bank:** Backhouse Bank
- Account Number:** 12345678
- Sort Code:** 01-02-03
- Payment Method:** BACS
- Bank Reference:** <INV>

Below the grid, there is a toggle for 'Do you receive commission carried out by this contractor?' (turned on). To the right, the 'Financial Notes' section includes a text area for notes and a 'My account' button.

This is a second screenshot of the same 'Financial' screen. The layout is identical to the first, showing the 'Bank Information' grid with the same values: Account Name (Morgan Contracting), Bank (Backhouse Bank), Account Number (12345678), Sort Code (01-02-03), Payment Method (BACS), and Bank Reference (<INV>). The 'Financial Notes' section and the 'My account' button are also visible.

iampropertyCRMmovebutleriamsold

My dayLettingsSalesAccountsReportingCommunications

My account

400

Bank Information

Account Name

Morgan Contracting

Bank

Backhouse Bank

Account Number

12345678

Sort Code

01-02-03

Payment Method

BACS

Bank Reference

<INV>

Do you receive commission carried out by this contractor?

Rate of Vat

Primary

Commission

£ 15.00

%

£

Default Expense Sub-Type

Financial Notes

Financial Notes

B

I

U

Enter your financial notes here...

Jobs Paid40

Live Jobs0

Last Contacted

Details

Checklist

My Jobs

Financial

Contractor Users

Documents

Journal

AUDIT

Bank Information

Account Name

Morgan Contracting

Bank

Backhouse Bank

Account Number

12345678

Sort Code

01-02-03

Payment Method

BACS

Bank Reference

<INV>

Do you receive commission carried out by this contractor?

Rate of Vat

Primary

Commission

£ 15.00

%

£

Default Expense Sub-Type

Exempt

Exempt

Expenditures should be exempt from VAT

Inclusive

Inclusive

Expenditures should be inclusive of VAT

Exclusive

Exclusive

Expenditures should be exclusive of VAT

Financial Notes

Financial Notes

B

I







U

Enter your financial notes here...

40  
0

Users

Bank Information

 <b>Account Name</b> Morgan Contracting	 <b>Bank</b> Backhouse Bank	 <b>Account Number</b> 12345678
 <b>Sort Code</b> 01-02-03	 <b>Payment Method</b> BACS	 <b>Bank Reference</b> <INV>

Do you receive commission carried out by this contractor?

Rate of Vat **Primary** Commission £ 15.00

Default Expense Sub-Type


**Exempt**  
Expenses should be exempt from VAT

**Inclusive** ✓  
Expenses should be inclusive of VAT

**Exclusive**  
Expenses should be exclusive of VAT

Payment Method  
BACS  
Bank Transfer  
Credit Card  
Direct Debit  
H & P







Enter your financial notes here...



40  
0

Users

Bank Information

 <b>Account Name</b> Morgan Contracting	 <b>Bank</b> Backhouse Bank	 <b>Account Number</b> 12345678
 <b>Sort Code</b> 01-02-03	 <b>Payment Method</b> BACS	 <b>Bank Reference</b> <INV>

Do you receive commission carried out by this contractor?

Rate of Vat **Primary** Commission £ 15.00 % £


Default Expense Sub-Type


**Exempt**  
Expenses should be exempt from VAT

**Inclusive** ✓  
Expenses should be inclusive of VAT

**Exclusive**  
Expenses should be exclusive of VAT

Financial Notes

Financial Notes  
**B I U**   
Enter your financial notes here...





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If you receive a commission, or a payment for allocating work to your contractor. Click here and note the amounts, this will link to the Expenses module in accounts and then ensure that the correct amounts are taken and paid to the Contractor and yourselves.

**Contractor Information**

<b>Account Name</b> Morgan Contracting	<b>Bank</b> Backhouse Bank	<b>Account Number</b> 12345678
<b>Sort Code</b> 01-02-03	<b>Payment Method</b> BACS	<b>Bank Reference</b> <INV>

Do you receive commission carried out by this contractor? ☒

Rate of Vat: **Primary** | Commission: £ 15.00 | % | £

Default Expense Sub-Type: **Inclusive** (checked)

**Exempt**: Expenses should be exempt from VAT  
**Inclusive**: Expenses should be inclusive of VAT  
**Exclusive**: Expenses should be exclusive of VAT

**Financial Notes**

Financial Notes: **B** *I* U

Enter your financial notes here...

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Click "Documents" to add any documents, e.g. qualifications, Insurances etc.

**Contractor Information**

<b>Account Name</b> Morgan Contracting	<b>Bank</b> Backhouse Bank	<b>Account Number</b> 12345678
<b>Sort Code</b> 01-02-03	<b>Payment Method</b> BACS	<b>Bank Reference</b> <INV>

Do you receive commission carried out by this contractor? ☒

Rate of Vat: **Primary** | Commission: £ 15.00 | % | £

Default Expense Sub-Type: **Inclusive** (checked)

**Exempt**: Expenses should be exempt from VAT  
**Inclusive**: Expenses should be inclusive of VAT  
**Exclusive**: Expenses should be exclusive of VAT

**Financial Notes**

Financial Notes: **B** *I* U

Enter your financial notes here...