

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.



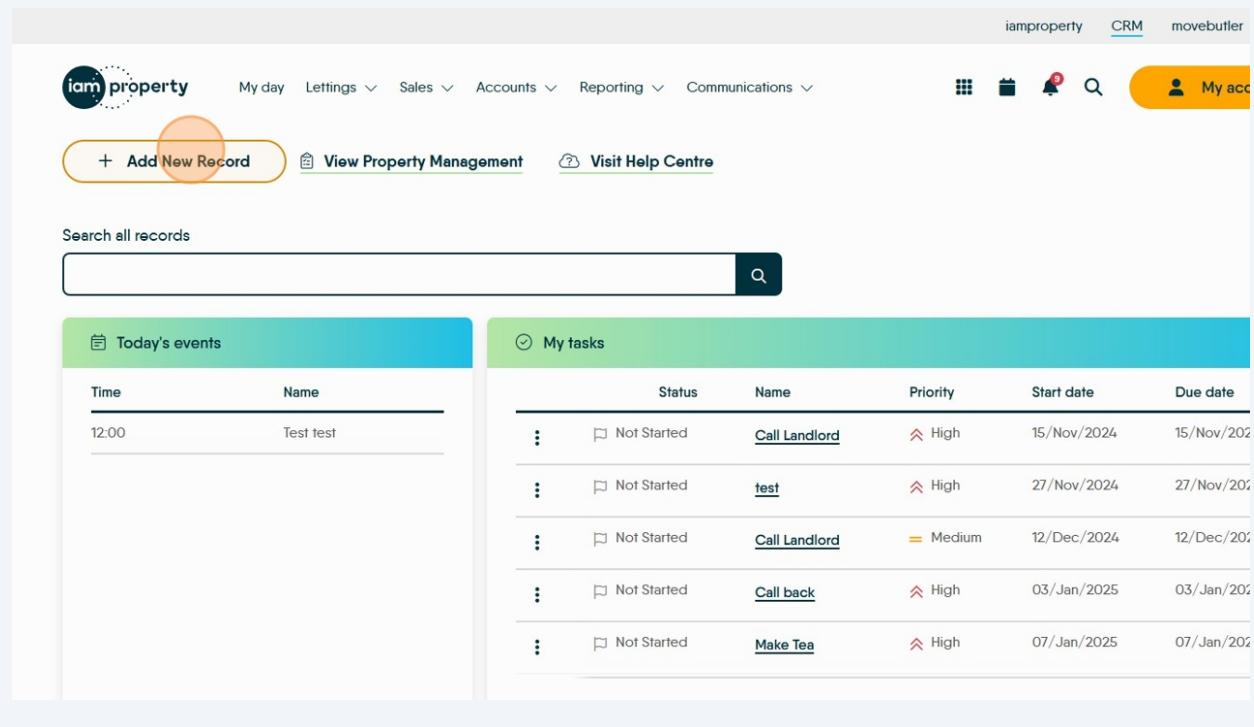
There are 2 main ways to add a contractor record. From the My Day screen and from the 'Bento' Menu, adding the record is the same from either way.

1

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

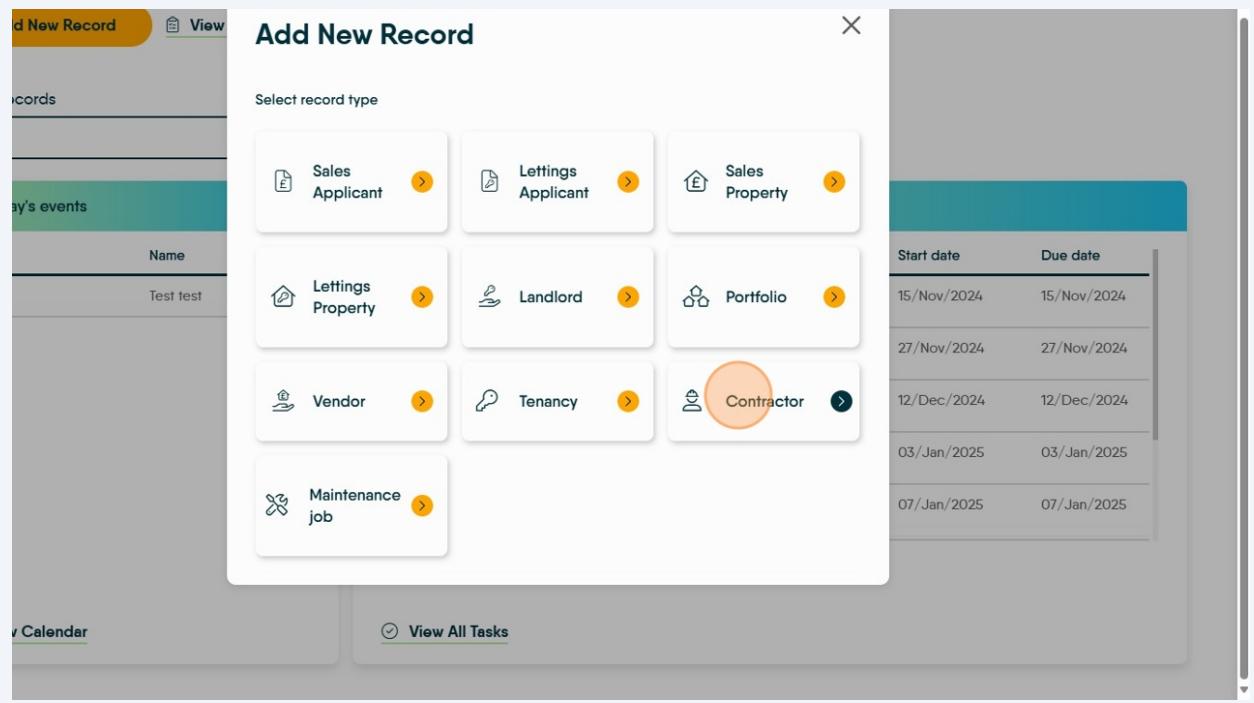
From the MyDay screen

2 Click "Add New Record"



The screenshot shows the iamproperty CRM interface. At the top, there are navigation links: My day, Lettings, Sales, Accounts, Reporting, and Communications. On the right, there are icons for CRM, movebutler, and a user profile. Below the navigation, there are two buttons: '+ Add New Record' (highlighted with an orange circle) and 'View Property Management'. A search bar with the placeholder 'Search all records' is also present. The main area is divided into two sections: 'Today's events' and 'My tasks'. The 'My tasks' section is highlighted with a green bar and contains a table with columns: Status, Name, Priority, Start date, and Due date. The table lists several tasks, including 'Call Landlord', 'test', 'Call Landlord', 'Call back', and 'Make Tea', all marked as 'Not Started'.

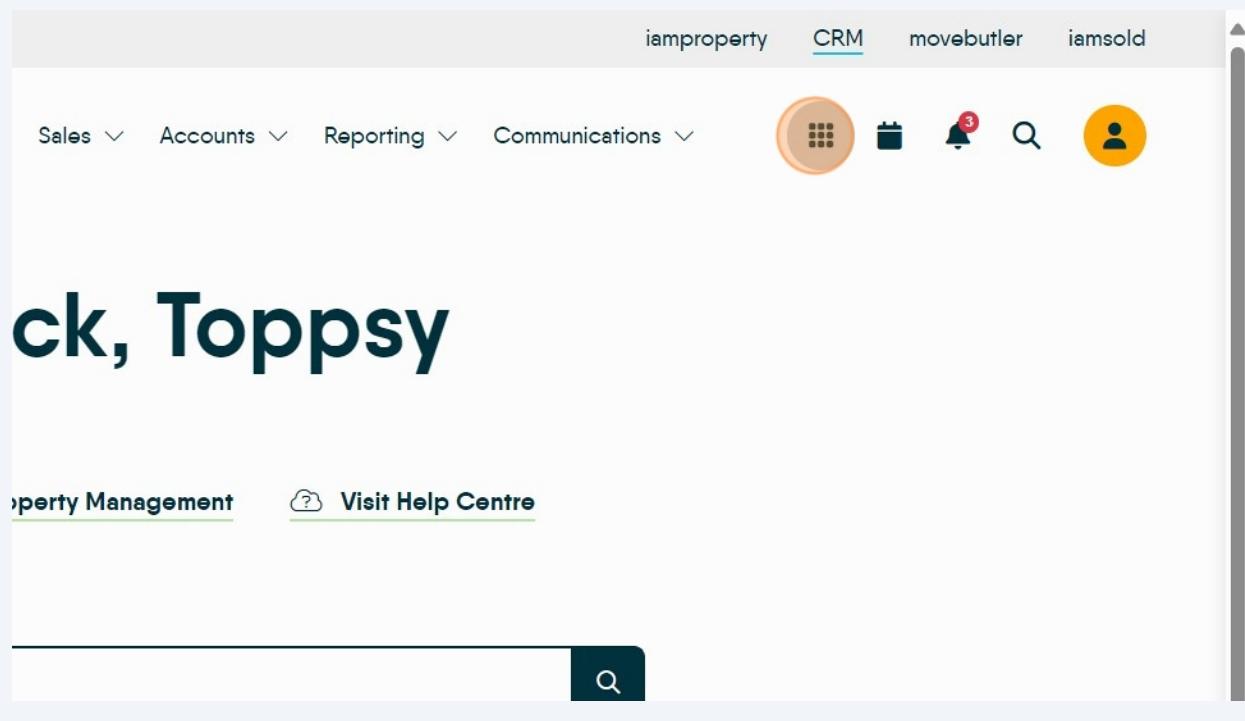
3 Click "Contractor"



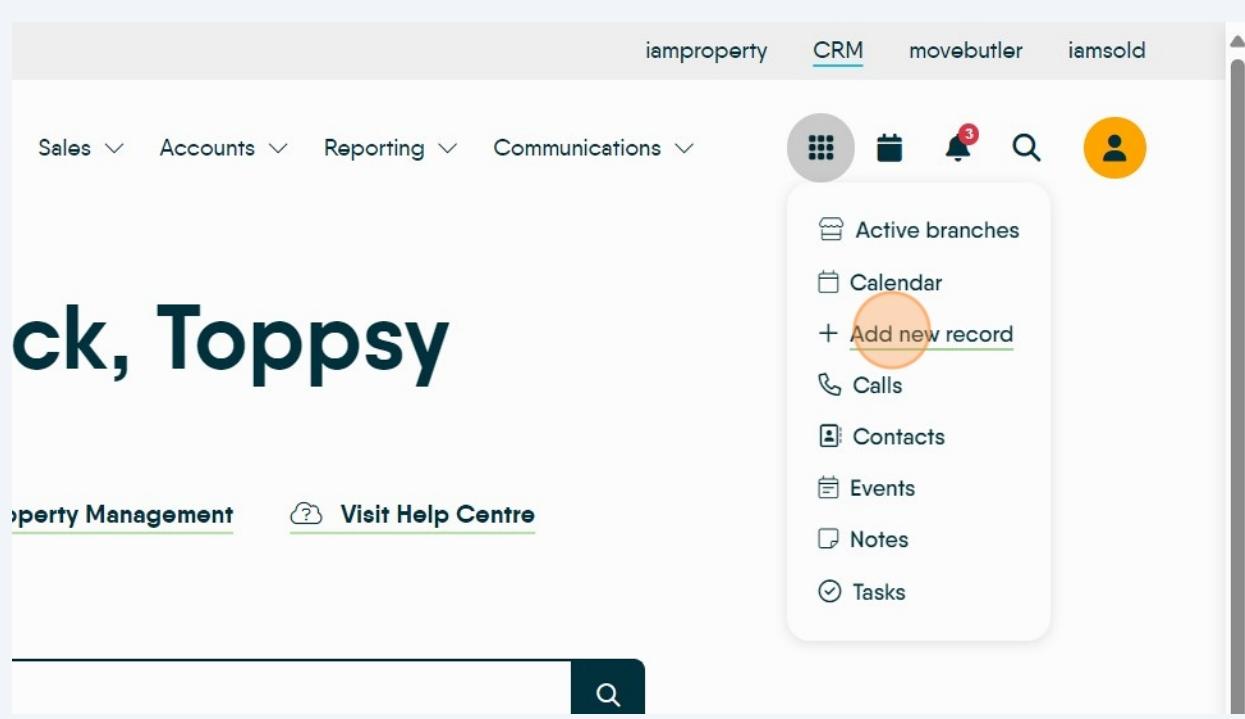
The screenshot shows the 'Add New Record' dialog box. At the top, there is a 'Select record type' section with a grid of nine options. The 'Contractor' option is highlighted with an orange circle. To the right of the grid, there is a table with columns: Start date and Due date. The table lists five rows of data: 15/Nov/2024, 15/Nov/2024; 27/Nov/2024, 27/Nov/2024; 12/Dec/2024, 12/Dec/2024; 03/Jan/2025, 03/Jan/2025; and 07/Jan/2025, 07/Jan/2025.

From the Bento Menu

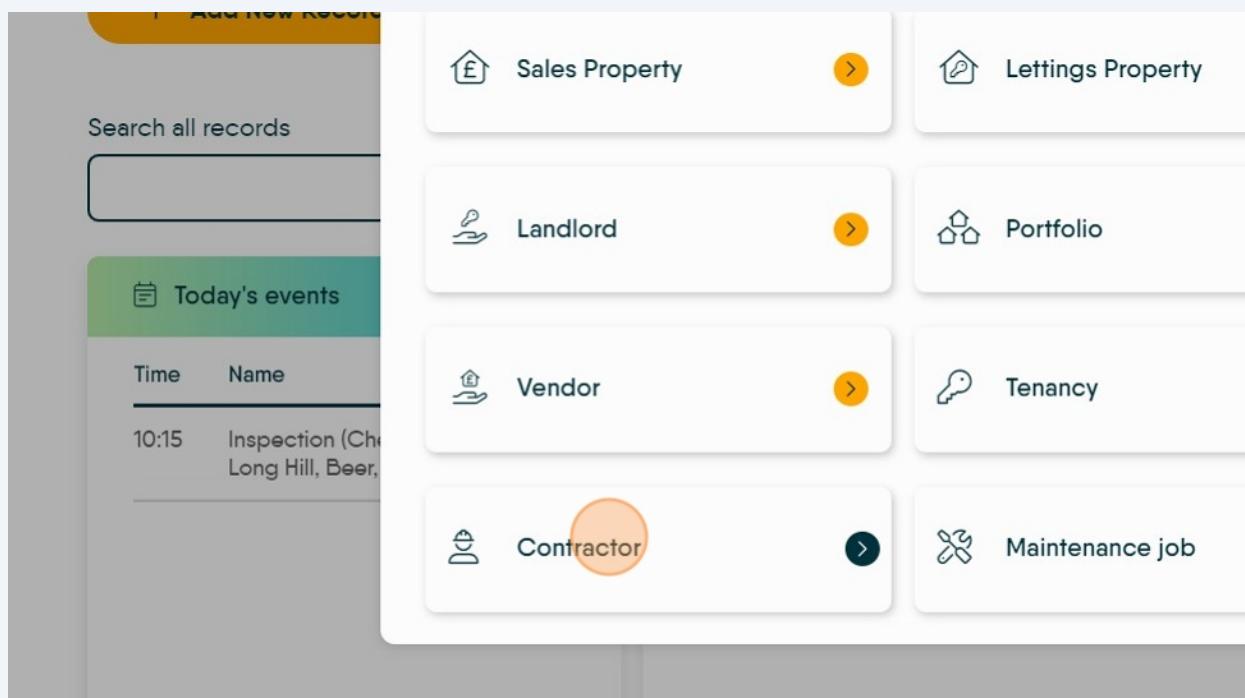
4 Click On the 'Bento' menu



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 <input type="text"/>	Website <input type="text"/>
Phone number <input type="text"/>	Work phone <input type="text"/>
Mobile phone <input type="text"/>	Email address <input type="text"/>
Public liability required? <input type="checkbox"/>	Expiry date <input type="text" value="02/12/2024"/> <input type="button" value="CLEAR"/>

Services provided

Select services <input type="text"/>
Select branches serviced <input type="text"/>
<input type="button" value="Select All"/>

Contact notes

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

Status: Active Negotiator: Topsy Turvey

Services provided

Website <input type="text"/>
Work phone <input type="text"/>
Email address <input type="text" value="HC@hotmail.com"/> <input type="button" value="CLEAR"/>
Expiry date <input type="text" value="02/12/2024"/> <input type="button" value="CLEAR"/>

Select services

Select branches serviced

Contact notes

Services provided

Website

Work phone

Email address HC@hotmail.com

Expiry date 02/12/2024

Edit manually

Select services

Electricity

Gas

Water

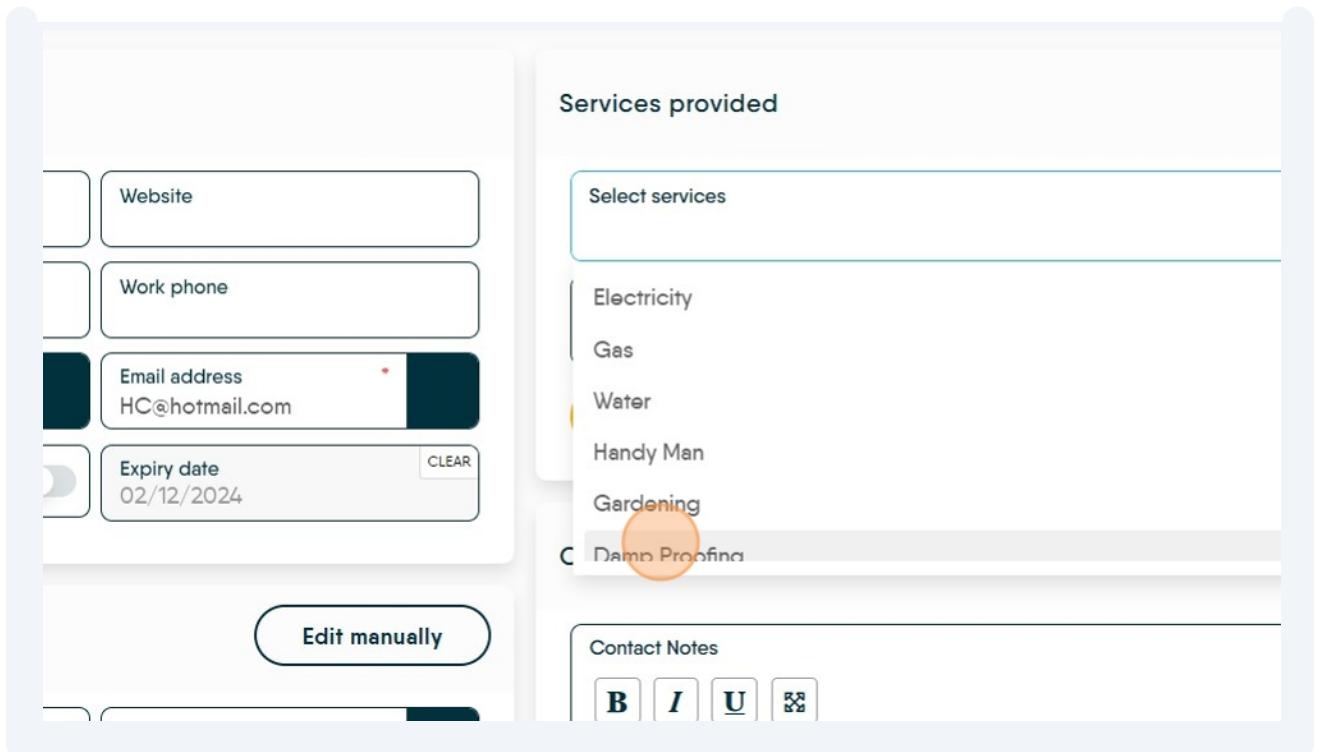
Handy Man

Gardening

Damp Proofing

Contact Notes

B **I** **U** **☒**



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

Services provided

Website

Work phone

Email address HC@hotmail.com

Expiry date 02/12/2024

Edit manually

Select services

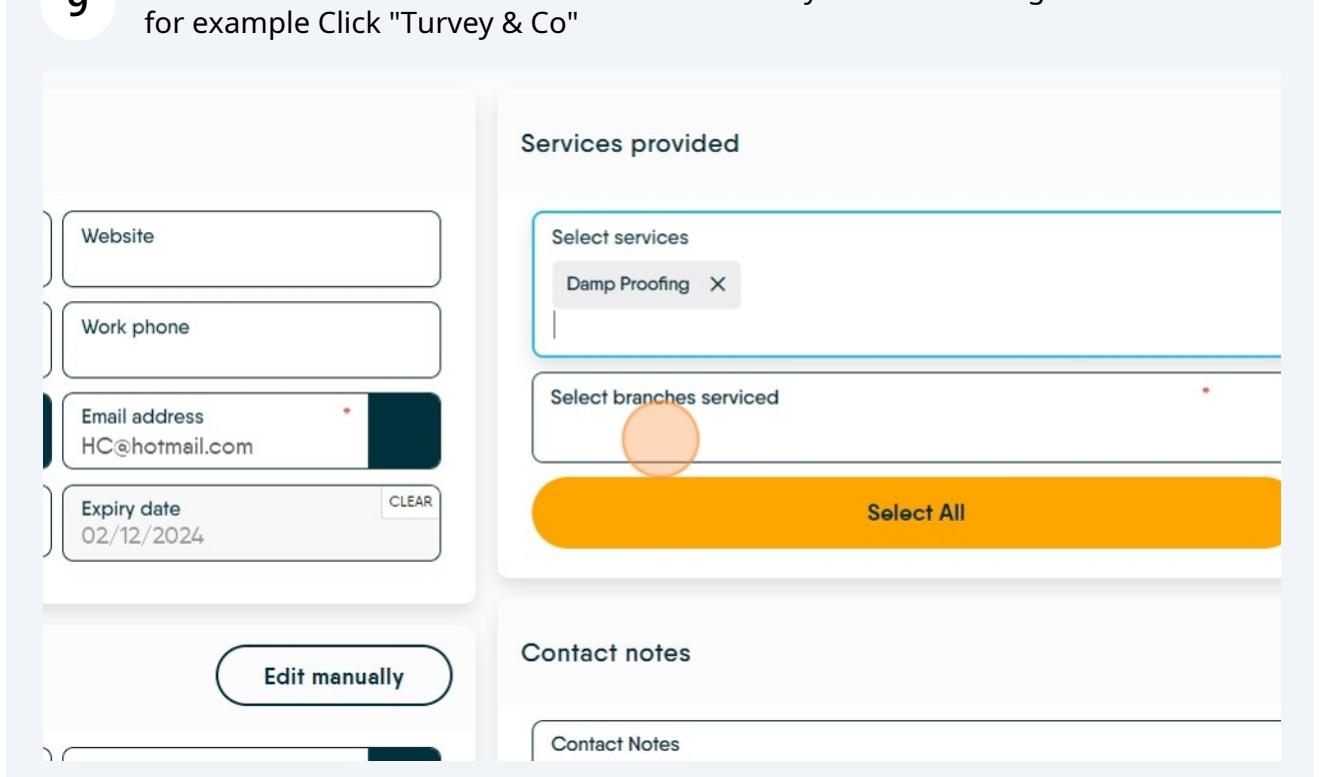
Damp Proofing **X**

Select branches serviced

Select All

Contact notes

Contact Notes



Status: Active
Negotiator: Topsy Turvey

Website

Work phone

Email address

HC@hotmail.com

Expiry date

02/12/2024

CLEAR

S

- 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.

Public liability required?

Expiry date

02/12/2024

CLEAR

Turvey & Co

Select All

Contractor address

Address type

Postcode

Edit manually

Contact notes

Contact Notes

B
I
U
X

Enter notes here...

Expiry date

02/12/2024
CLEAR

Ability required?
Edit manually

Select All

Contact notes

Contact Notes

B
I
U

Enter notes here...

Turvey & Co
X

Contact notes

Contact Notes

B
I
U

Enter notes here...

Search

type
Edit manually

or address

Mobile phone

X

-- 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

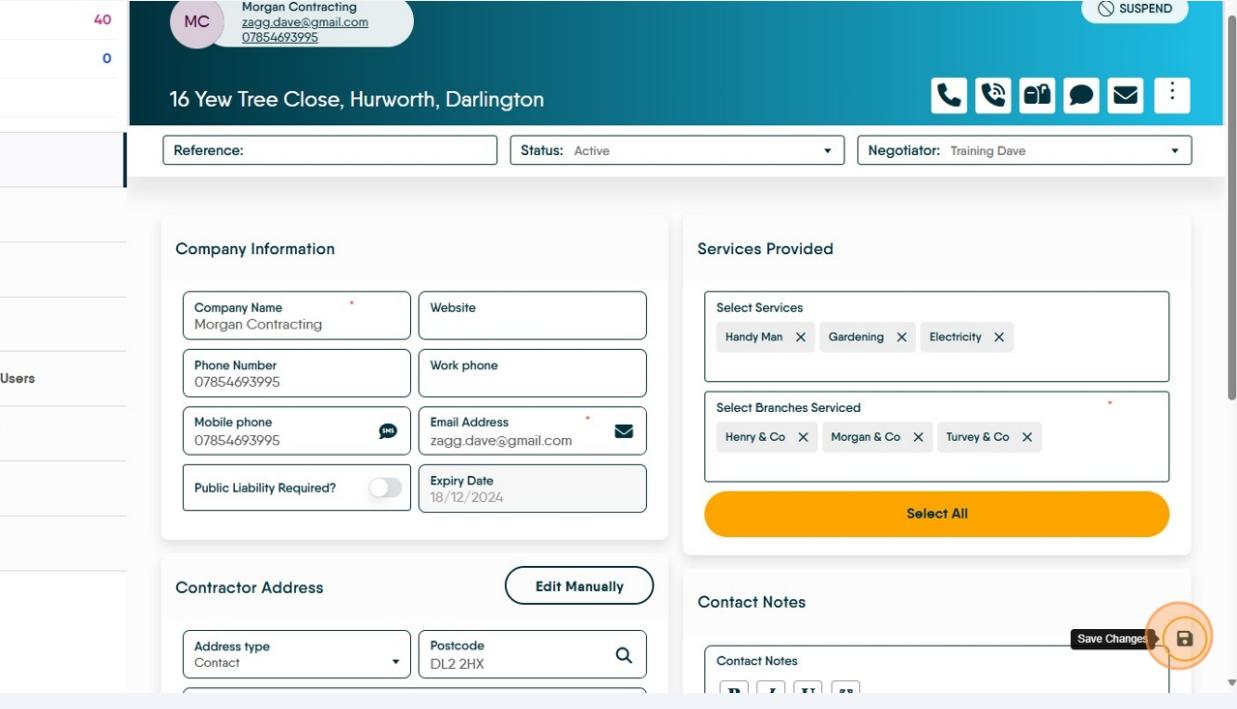
4 Franklin Avenue, Cheshunt, Waltham Cross, Hertfordshire, EN75DX, UK

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

Address

-- Select Address --

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



The screenshot shows the 'Contractor' setup screen. At the top, there is a header with 'MC' (Morgan Contracting), an email address (zagg.dave@gmail.com), and a phone number (07854693995). A 'SUSPEND' button is in the top right. Below the header, the address '16 Yew Tree Close, Hurworth, Darlington' is displayed. A toolbar with icons for phone, fax, lock, message, and email is at the top right. Below the address, there are dropdowns for 'Reference:' (set to ''), 'Status:' (set to 'Active'), and 'Negotiator:' (set to 'Training Dave')).

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 X, Gardening X, Electricity X

Select Branches Serviced: Henry & Co X, Morgan & Co X, Turvey & Co X

Contractor Address

Address type: Contact, Postcode: DL2 2HX

Contact Notes

Save Changes 



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.



My day Lettings Sales Accounts Reporting Communications



Jobs Paid

40

Live Jobs

0

Last Contacted

Details**Checklist****My Jobs****Financial****Contractor Users****Documents****Journal****AUDIT****Company Information**Company Name *
Morgan ContractingPhone Number
07854693995Mobile phone
07854693995Public Liability Required?

Website

Work phone

Email Address
zagg.dave@gmail.comExpiry Date
18/12/2024**Services Provided****Select Services**

Handy Man X Gardening X Electricity X

Select Branches Serviced

Henry & Co X Morgan & Co X Turvey & Co X

Select All**Contact Notes****Contact Notes****B** **I** **U** **W**

Enter notes here...

40 0

Morgan Contracting
zagg.dave@gmail.com
07854693995

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

Reference: **Status:** Active **Negotiator:** Training Dave

Add note 6 of 6 checked

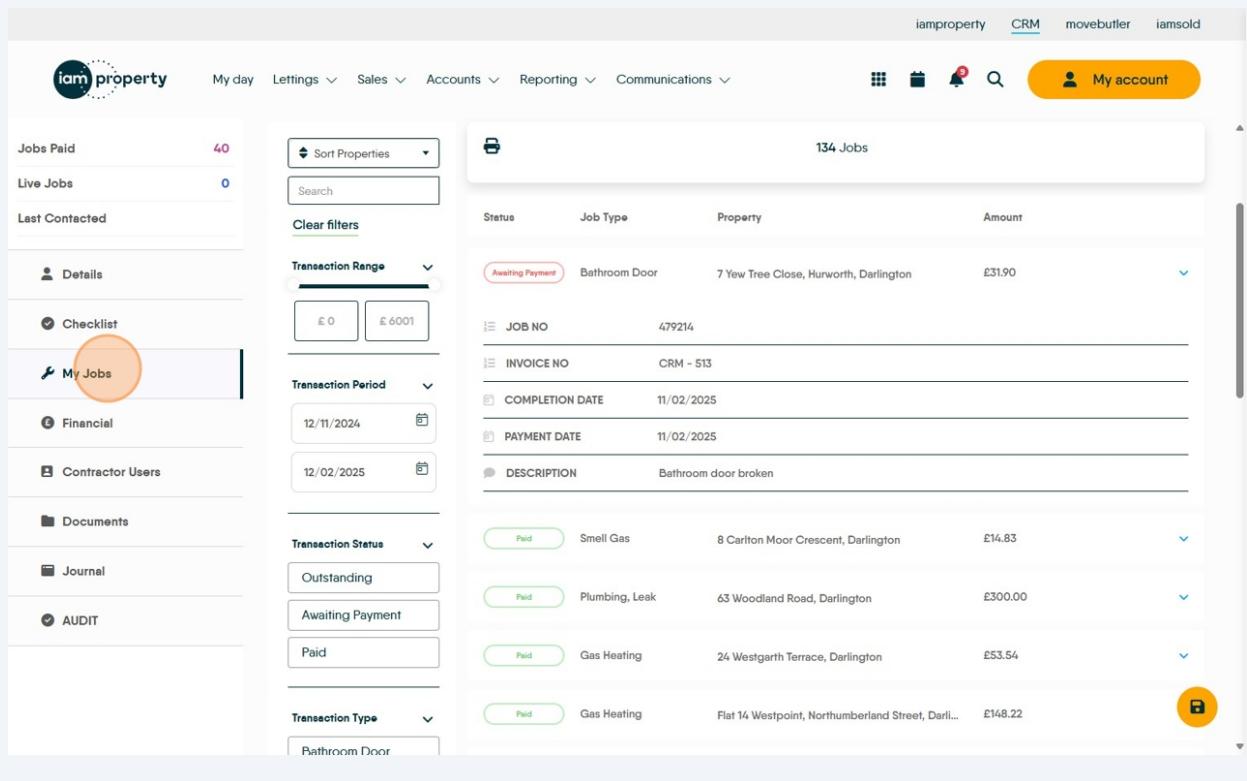
New contractor setup

- 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

13

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.



My day Lettings Sales Accounts Reporting Communications

My account

Jobs Paid 40

Live Jobs 0

Last Contacted

Details

Checklist

My Jobs

Financial

Contractor Users

Documents

Journal

AUDIT

Sort Properties

Search

Clear filters

Transaction Range £ 0 £ 6001

Transaction Period 12/11/2024 12/02/2025

Transaction Status Outstanding Awaiting Payment Paid

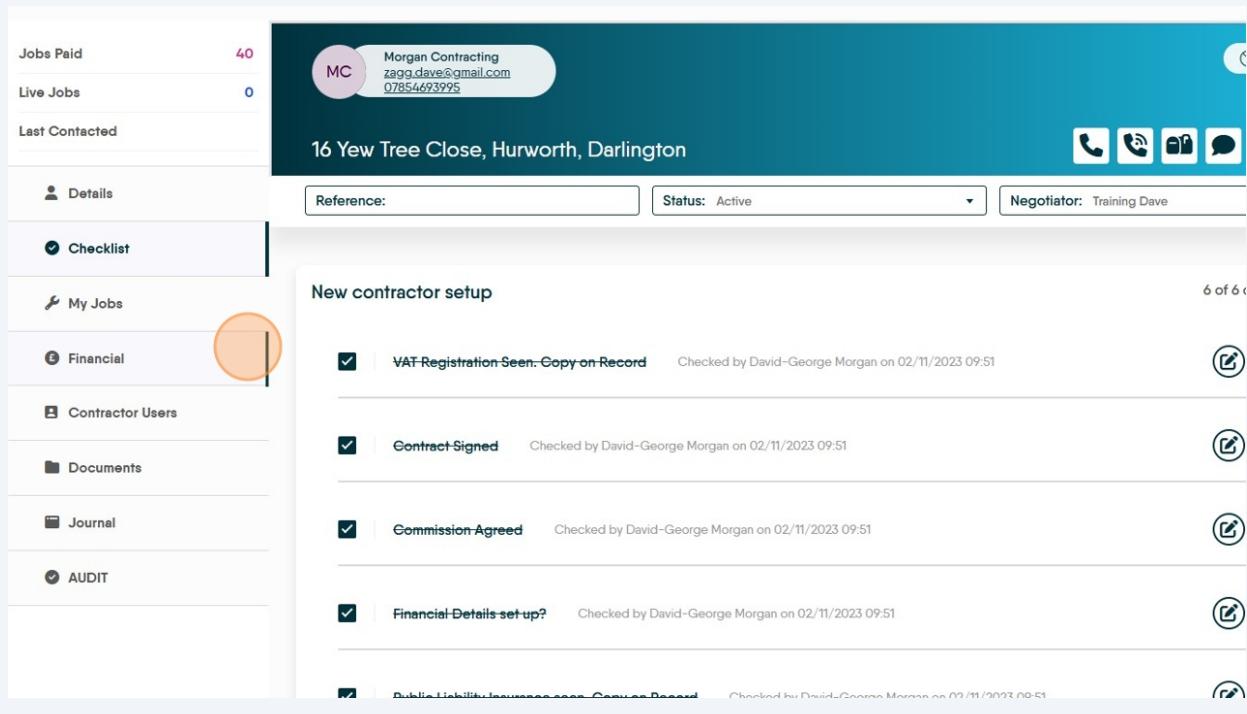
Transaction Type Bathroom Door

134 Jobs

Status	Job Type	Property	Amount
Awaiting Payment	Bathroom Door	7 Yew Tree Close, Hurworth, Darlington	£31.90
JOB NO	479214		
INVOICE NO	CRM - 513		
COMPLETION DATE	11/02/2025		
PAYMENT DATE	11/02/2025		
DESCRIPTION	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

14

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



Jobs Paid 40

Live Jobs 0

Last Contacted

Details

Checklist

My Jobs

Financial

Contractor Users

Documents

Journal

AUDIT

Morgan Contracting
zagg.dave@gmail.com
07854693995

16 Yew Tree Close, Hurworth, Darlington

Reference: Status: Active Negotiator: Training Dave

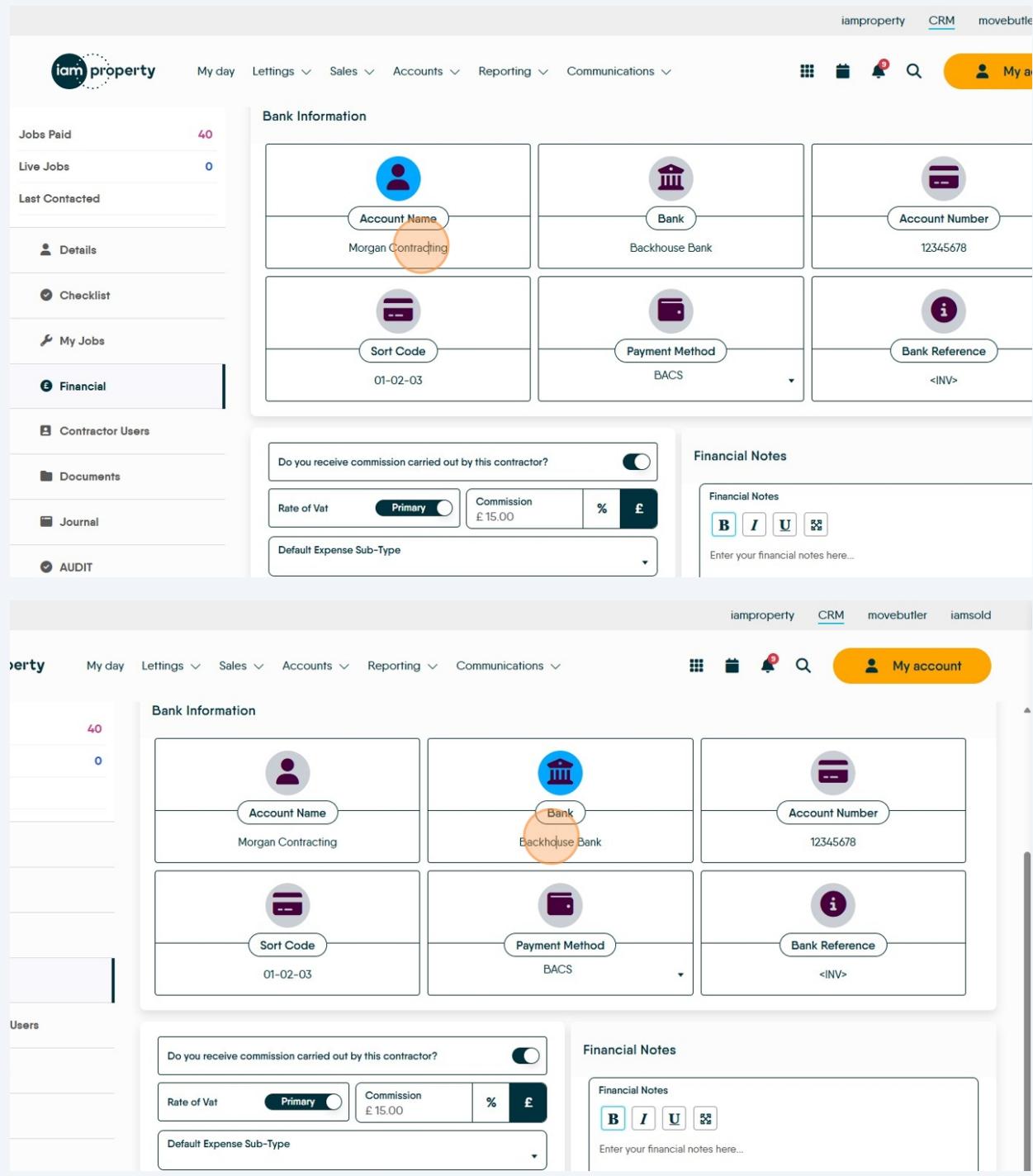
New contractor setup

<input checked="" type="checkbox"/> VAT Registration Seen. Copy on Record	Checked by David-George Morgan on 02/11/2023 09:51	
<input checked="" type="checkbox"/> Contract Signed	Checked by David-George Morgan on 02/11/2023 09:51	
<input checked="" type="checkbox"/> Commission Agreed	Checked by David-George Morgan on 02/11/2023 09:51	
<input checked="" type="checkbox"/> Financial Details set up?	Checked by David-George Morgan on 02/11/2023 09:51	
<input checked="" type="checkbox"/> Public Liability Insurance Cover Required	Checked by David-George Morgan on 02/11/2023 09:51	

15

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.



Bank Information

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

Financial Notes

Do you receive commission carried out by this contractor?

Rate of Vat Primary Commission £15.00 % £

Default Expense Sub-Type

Financial Notes

B I U

Enter your financial notes here...

Users

Do you receive commission carried out by this contractor?

Rate of Vat Primary Commission £15.00 % £

Default Expense Sub-Type

Morty

My day Lettings Sales Accounts Reporting Communications



My account

Bank Information

40

0

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

Users

Do you receive commission carried out by this contractor?



Rate of Vat

Primary

Commission

£ 15.00

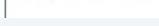
%

£

Default Expense Sub-Type

Financial Notes

Financial Notes



Enter your financial notes here...

Jobs Paid

40

Live Jobs

0

Last Contacted

Details

Checklist

My Jobs

Financial

Contractor Users

Documents

Journal

AUDIT

Bank Information

Jobs Paid

40

Live Jobs

0

Last Contacted

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

Financial Notes

Financial Notes



Enter your financial notes here...

40
0

Bank Information

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

Users

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

Enter your financial notes here... 

40
0

Bank Information

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

Users

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 

Enter your financial notes here... 

16

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.

The screenshot shows the 'Financial' section of the software. On the left, a sidebar lists 'Jobs Paid' (40), 'Live Jobs' (0), 'Last Contacted', 'Details', 'Checklist', 'My Jobs', and 'Financial' (selected). The main area displays financial information for 'Morgan Contracting' including: Account Name (Morgan Contracting), Bank (Backhouse Bank), Account Number (12345678), Sort Code (01-02-03), Payment Method (BACS), and Bank Reference (<INV>). Below this, a section asks 'Do you receive commission carried out by this contractor?' with a toggle switch. It also shows 'Rate of Vat' (Primary), 'Commission' (£15.00), and 'Default Expense Sub-Type' (Inclusive). A 'Financial Notes' section on the right contains buttons for B, I, U, and a file icon, with a placeholder 'Enter your financial notes here...'.

17

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

The screenshot shows the 'Documents' section of the software. On the left, a sidebar lists 'Jobs Paid' (40), 'Live Jobs' (0), 'Last Contacted', 'Details', 'Checklist', 'My Jobs', 'Financial' (selected), and 'Documents' (selected). The main area displays financial information for 'Morgan Contracting' including: Account Name (Morgan Contracting), Bank (Backhouse Bank), Account Number (12345678), Sort Code (01-02-03), Payment Method (BACS), and Bank Reference (<INV>). Below this, a section asks 'Do you receive commission carried out by this contractor?' with a toggle switch. It also shows 'Rate of Vat' (Primary), 'Commission' (£15.00), and 'Default Expense Sub-Type' (Inclusive). A 'Financial Notes' section on the right contains buttons for B, I, U, and a file icon, with a placeholder 'Enter your financial notes here...'.