

Property Management - Creating a Maintenance Job



This guide outlines a simple step-by-step process for submitting maintenance job reports in the iamproperty CRM system. It helps property managers log tasks quickly and accurately, improving day-to-day efficiency. Key features like priority levels and photo uploads are highlighted to enhance contractor communication and ensure a faster response to tenant issues. Following this guide will help users navigate the system confidently and streamline property management tasks.

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

There are 2 main ways to create a maintenance job in iamproperty CRM. From the Property Management module or from the '+Add New Record' option on the MyDay screen or in the 'Bento' menu

- 2 Click "View property management" or click '+Add New Record' on the MyDay screen.

Welcome back, Training

[+ Add New Record](#)

[View Property Management](#)

[Visit Help Centre](#)

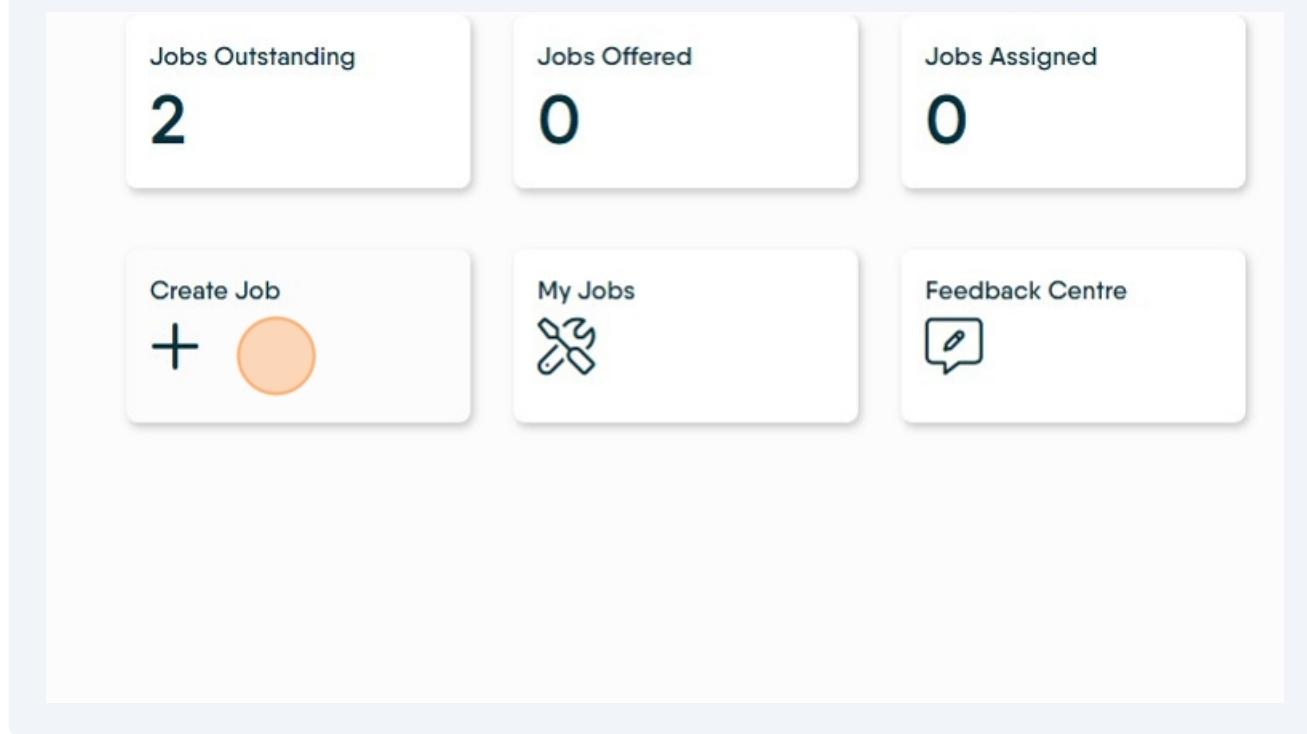
Search all records

A search bar with a magnifying glass icon on the right.

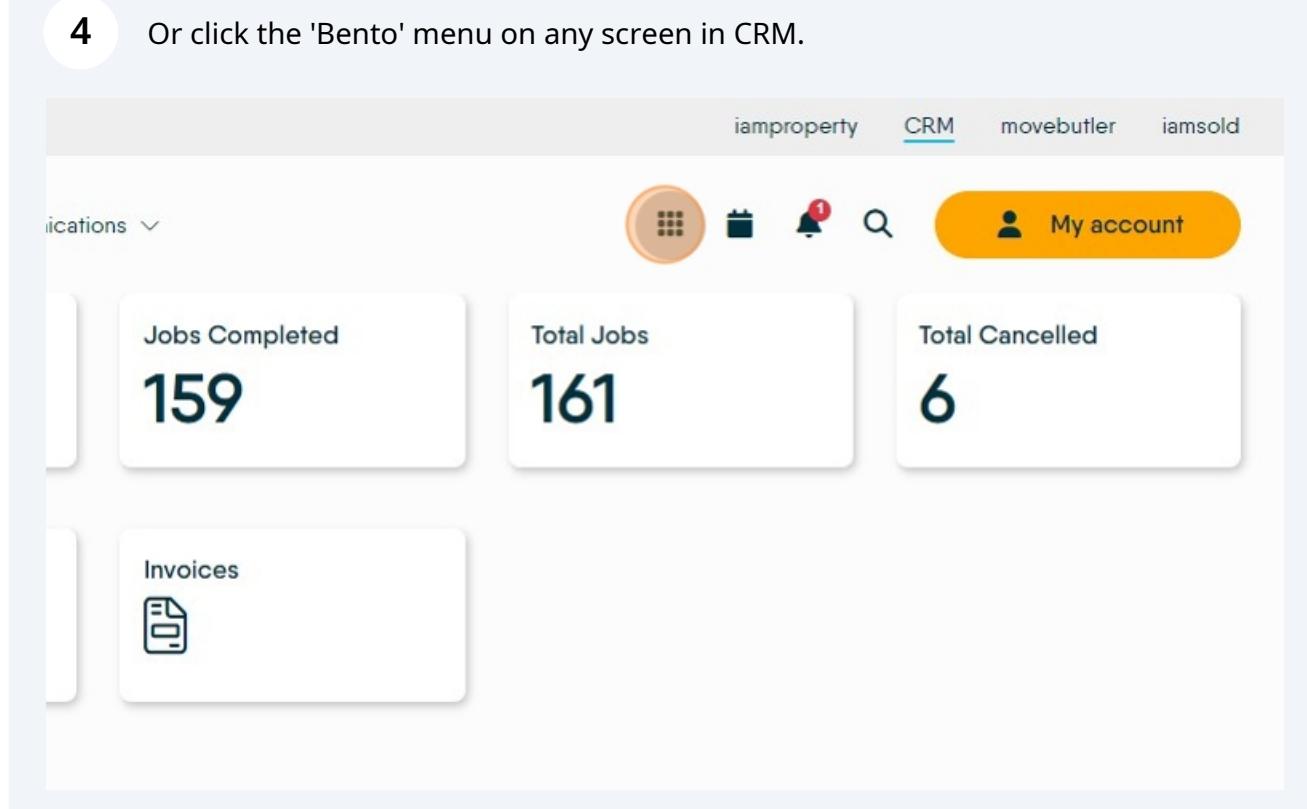
[Today's events](#)

[My tasks](#)

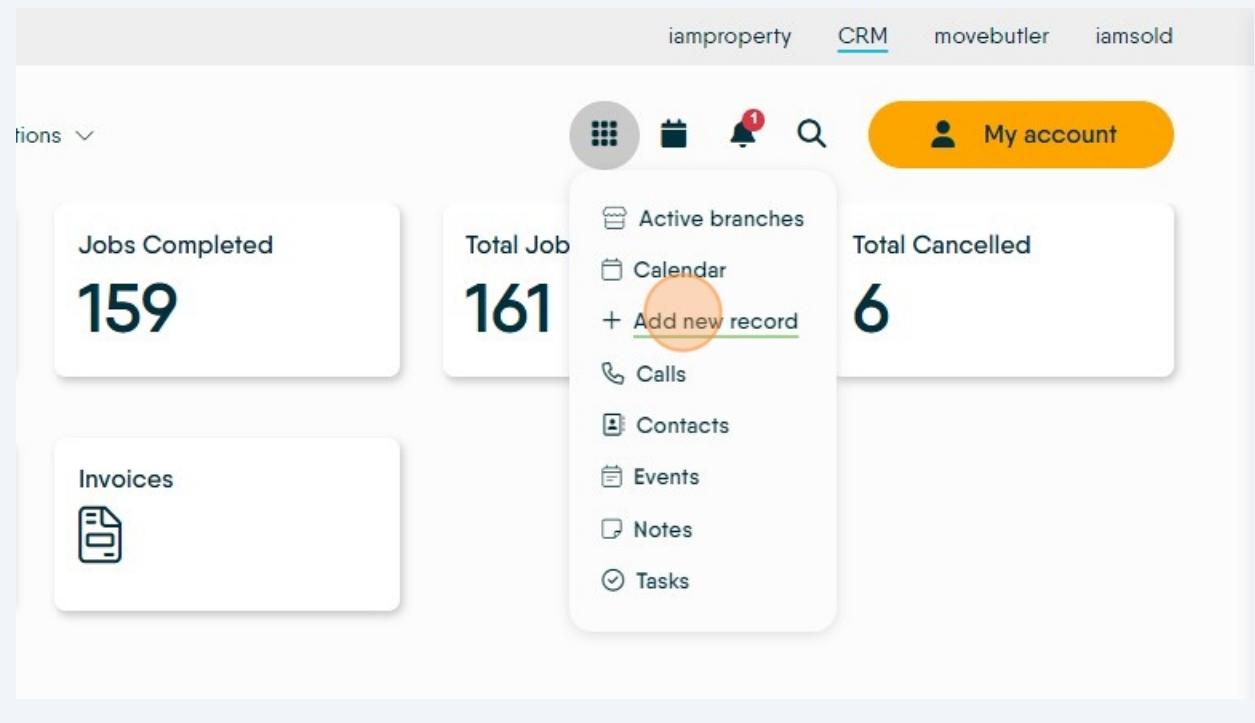
3 Then in Property Management, click here.



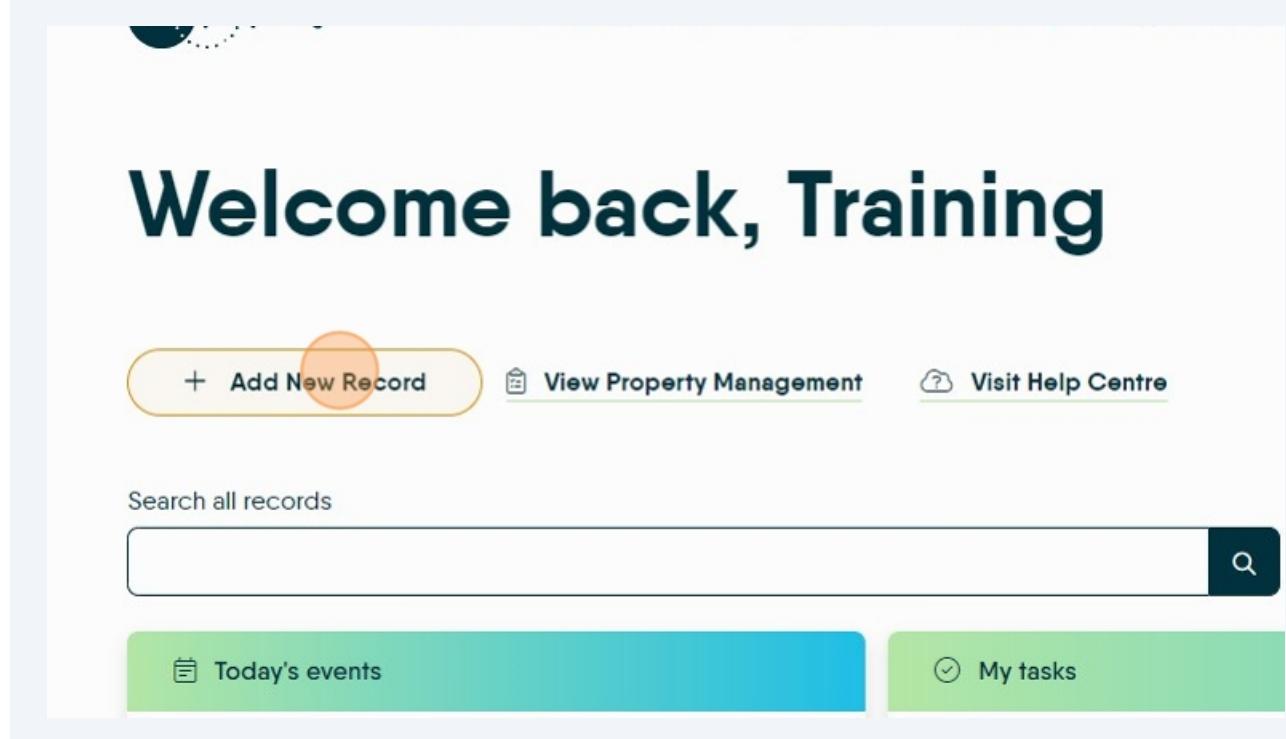
4 Or click the 'Bento' menu on any screen in CRM.



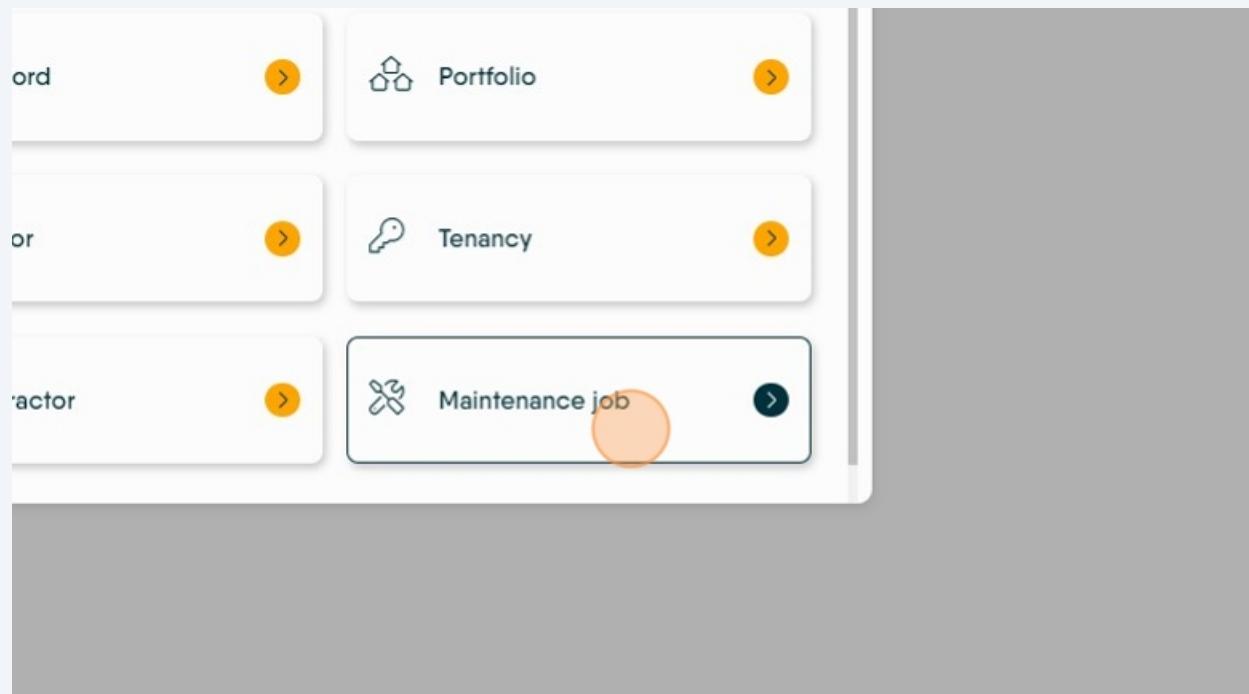
5 Click "Add new record" n.b. this is the same process if you have selected '+Add New Record' on the MyDay screen.



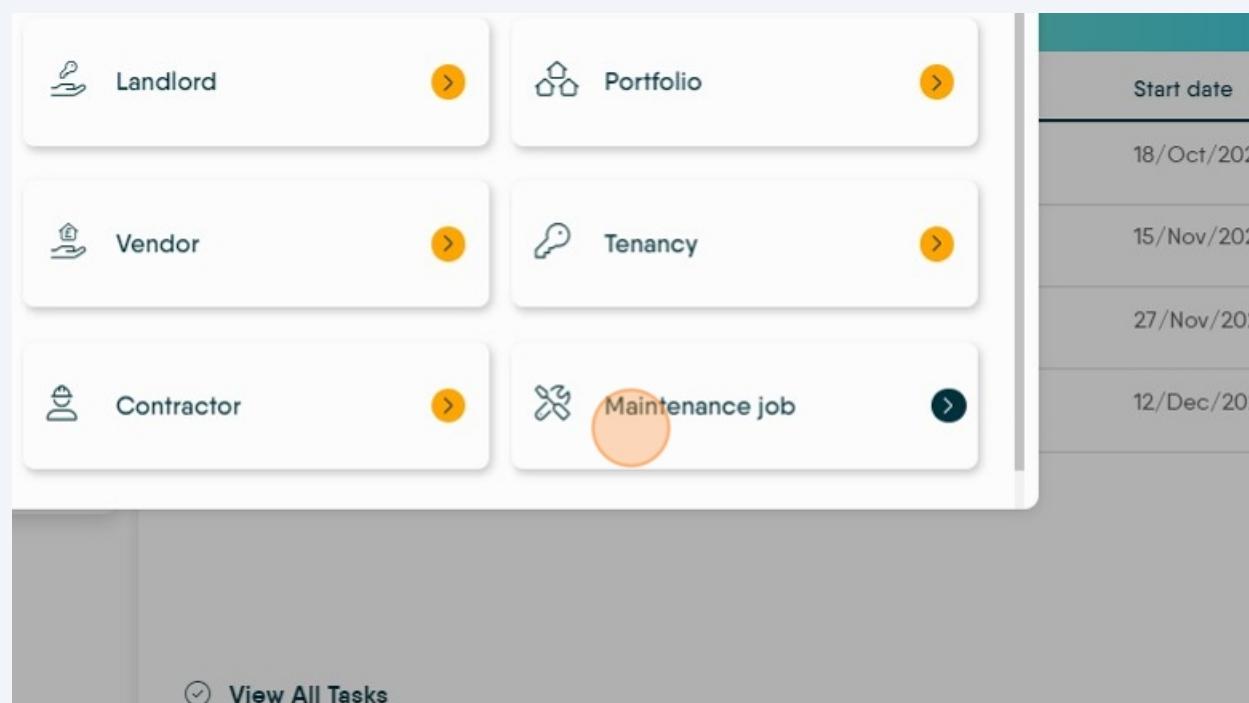
6 From MyDay screen click "Add New Record"



7 Click "Maintenance job"



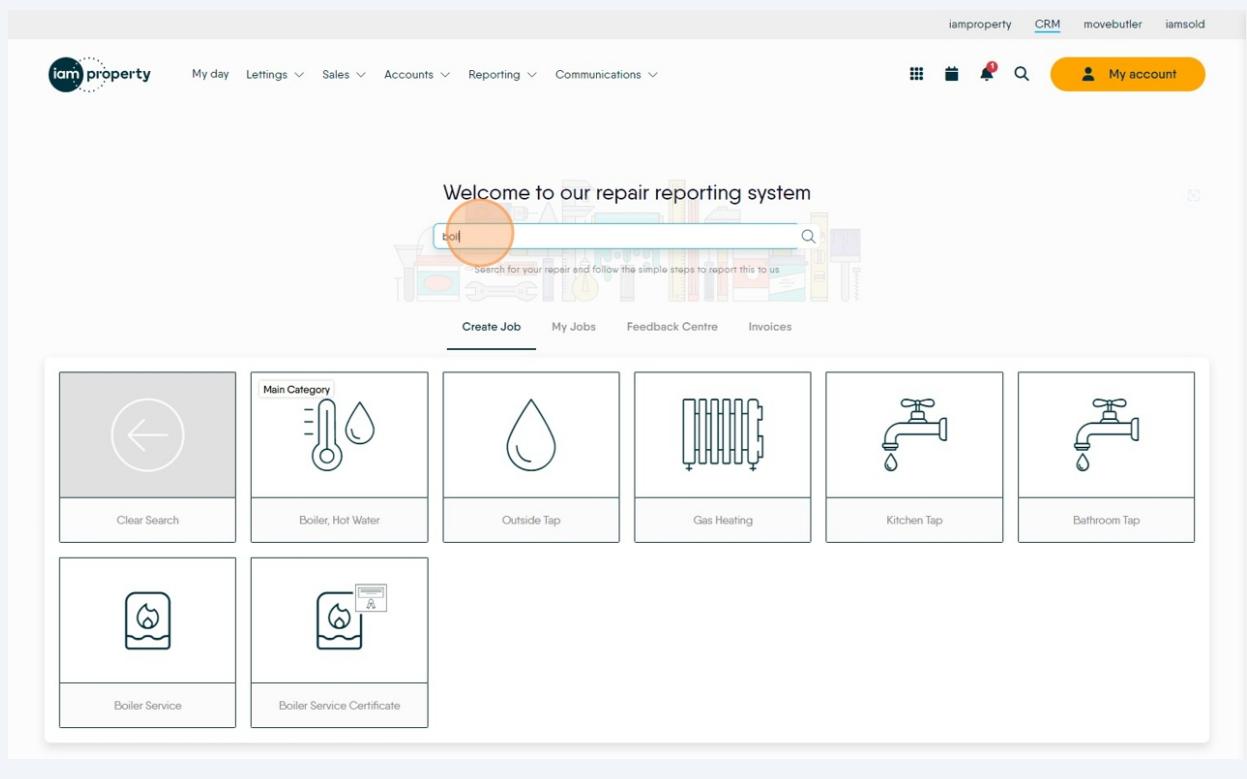
8 Click "Maintenance job"



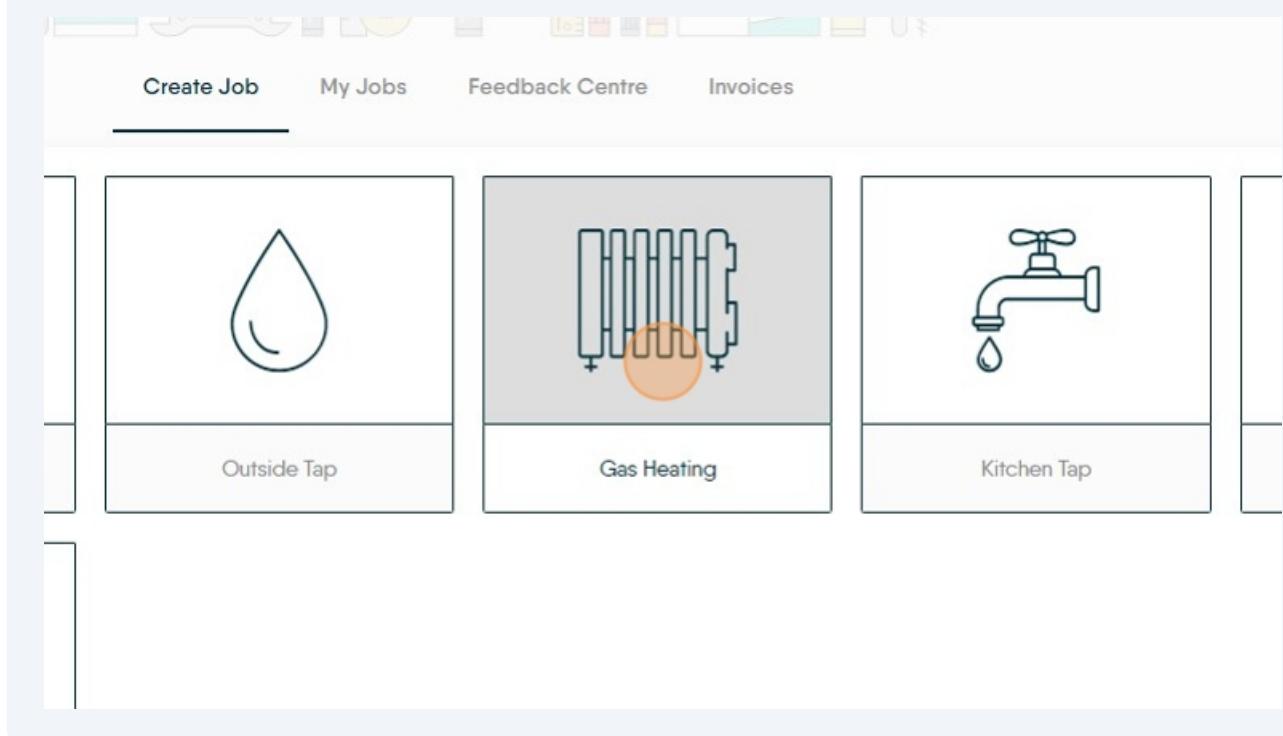
Creating the Maintenance Task

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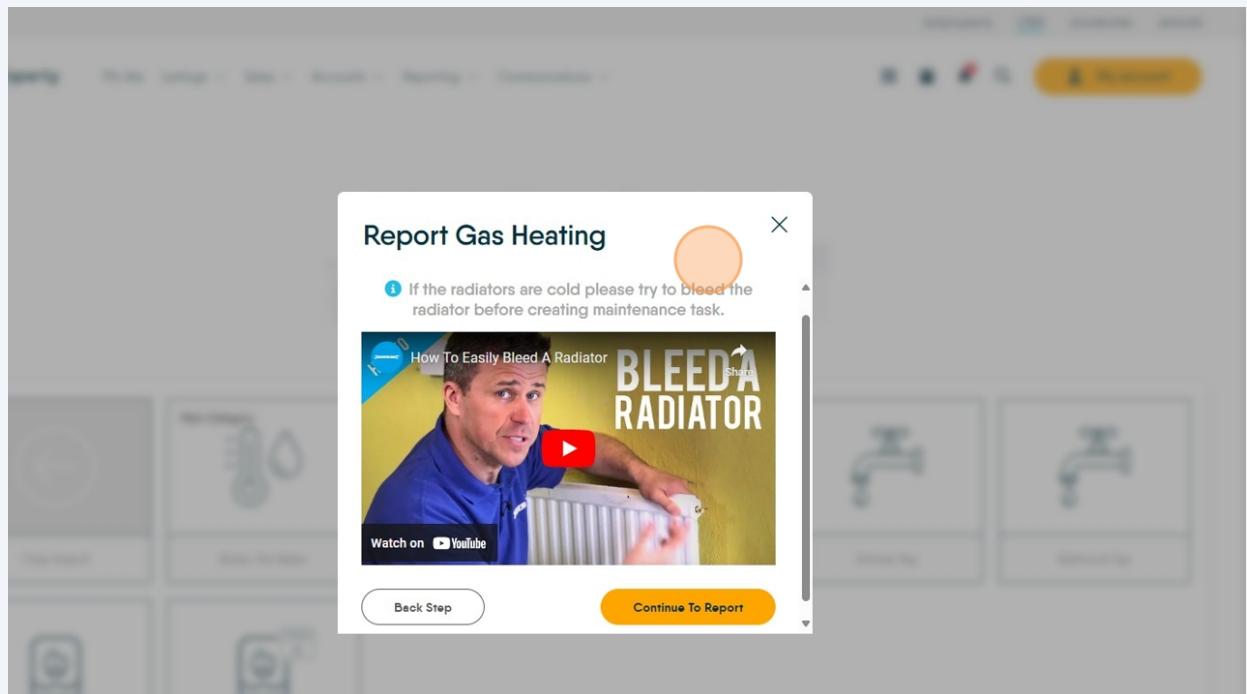
To search for the type of job you are raising click the "Enter a keyword here to get started..." field. Or, scroll through the list of categories (and sub categories) to find what you require.



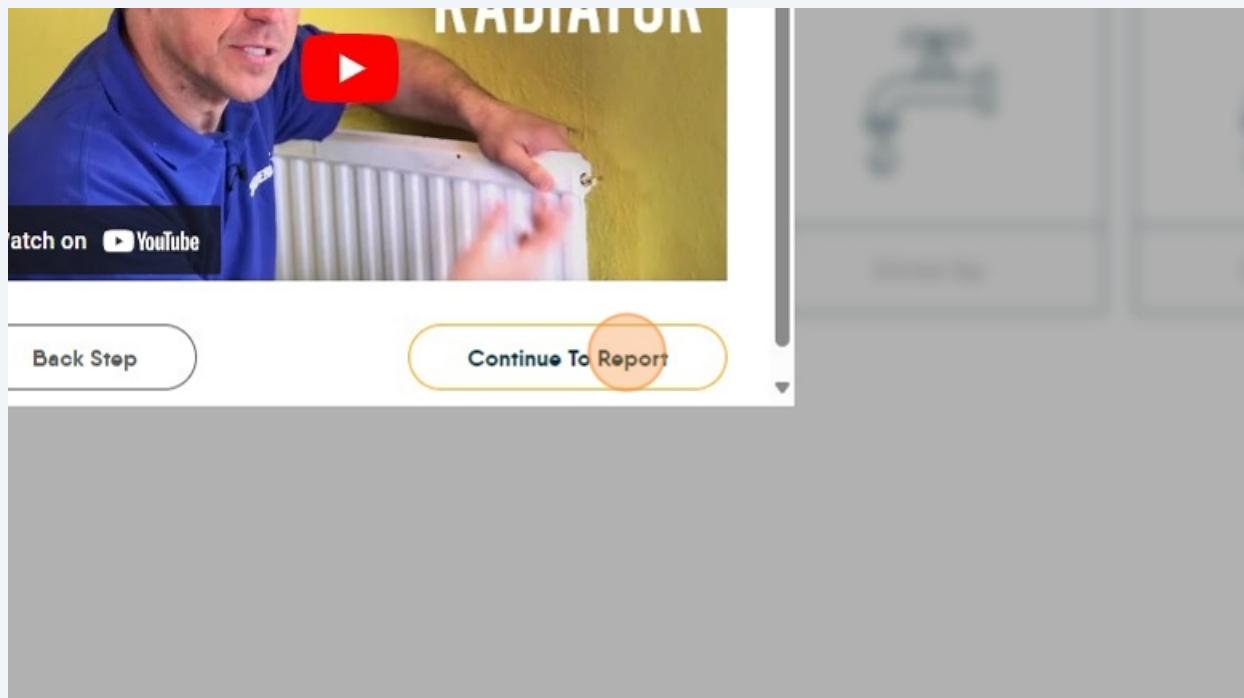
10 Click on to the category.



11 You may see a warning/informational message. These are set up by yourselves.
(Please ask if you want assistance doing this)

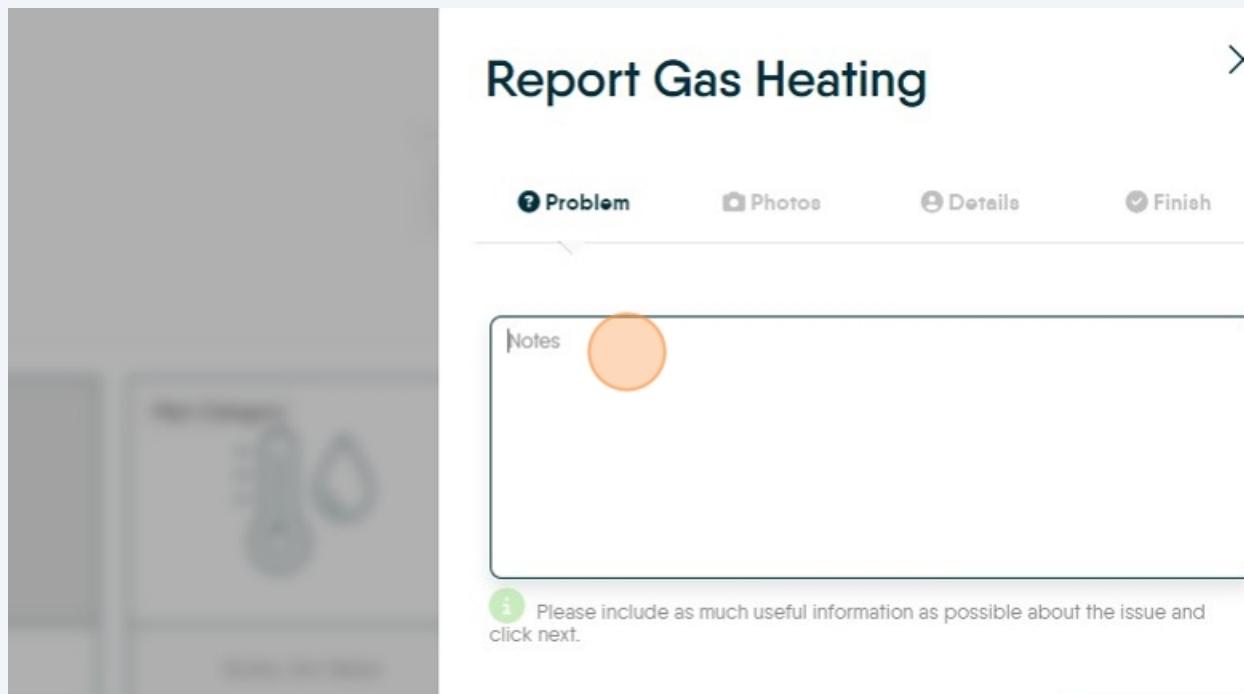


12 Click "Continue To Report"

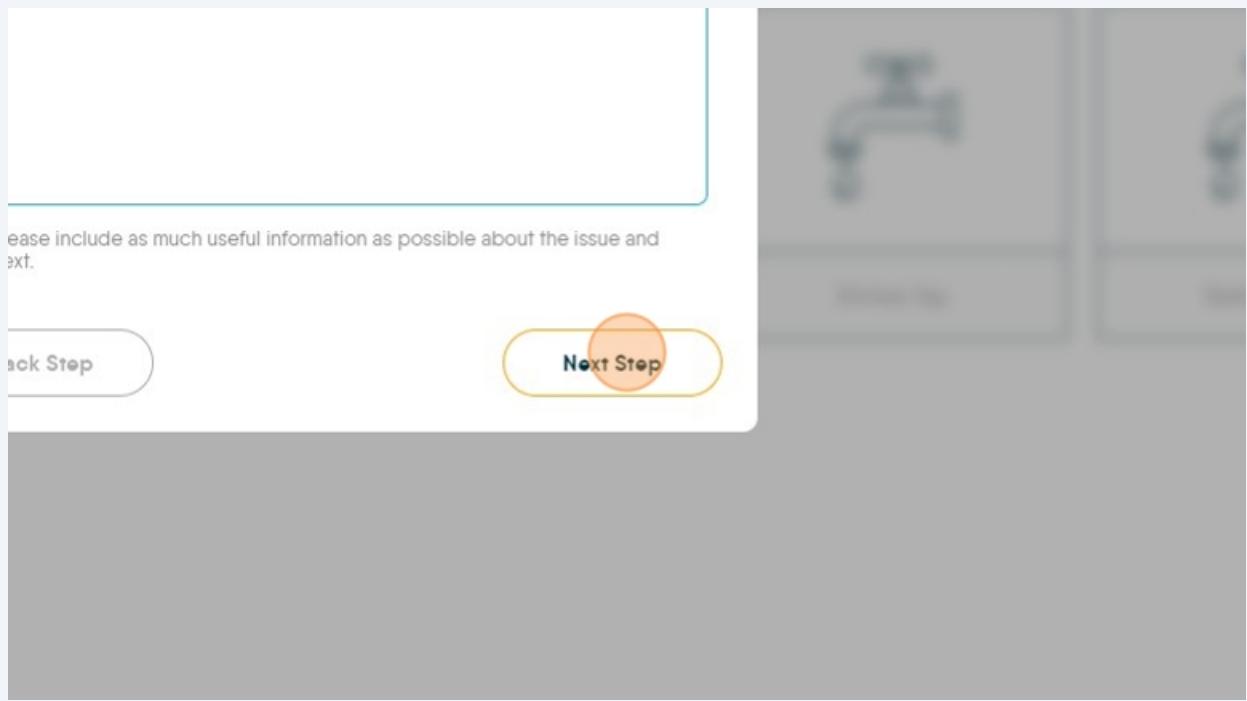


13 Click the "Notes" field. These notes are also shown on the Landlords statement as part of the maintenance task charging.

We advise keeping these notes brief and to the point.



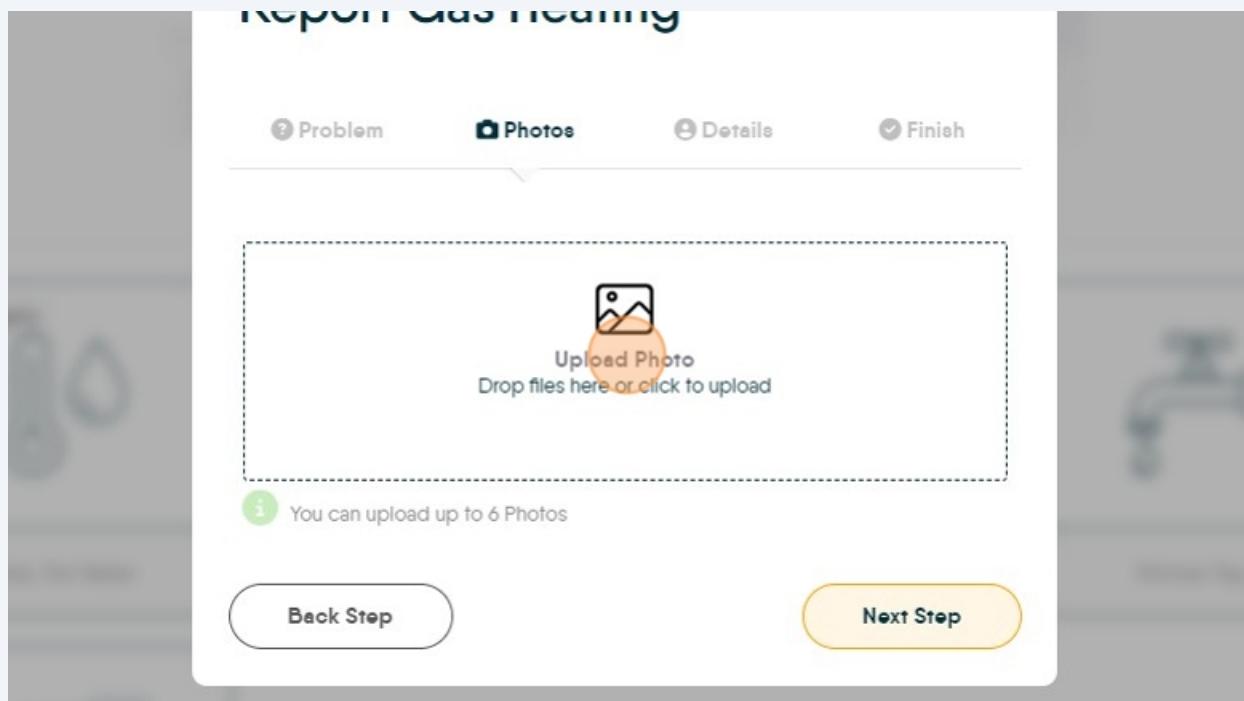
14 Click "Next Step"



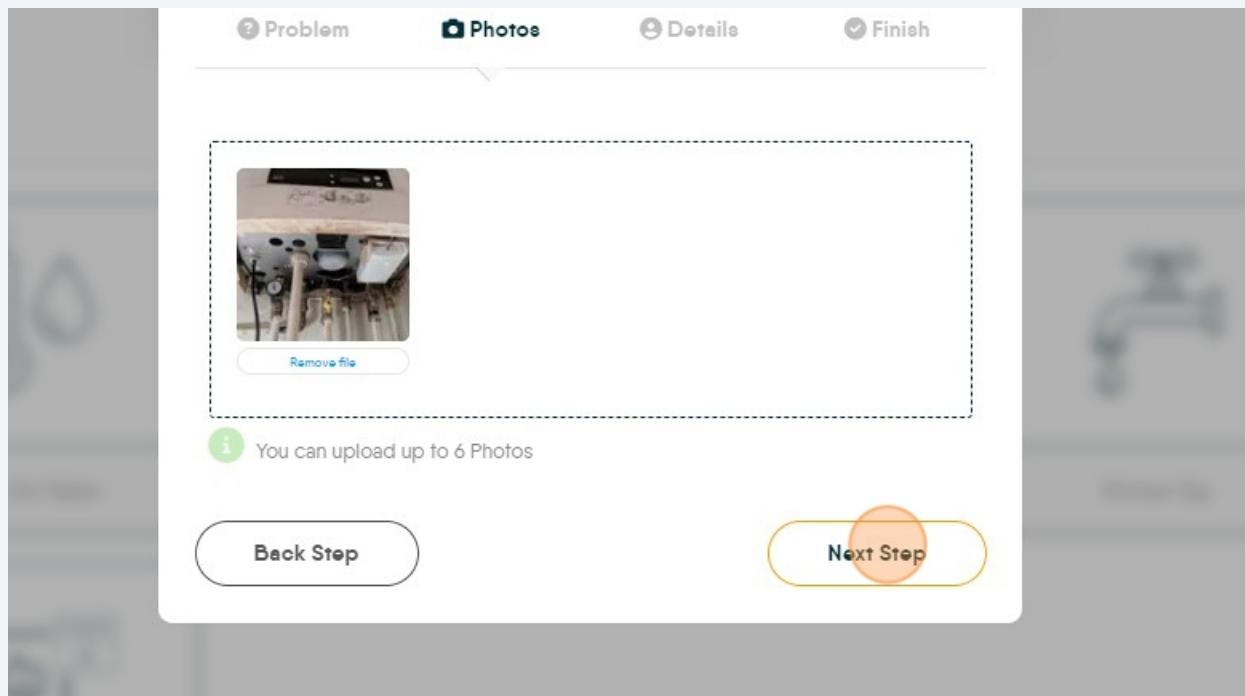
15 Up to 6 photographs can be uploaded from here.

The images are shown on the Contractor email, in the Contractor portal and in the job record as well.

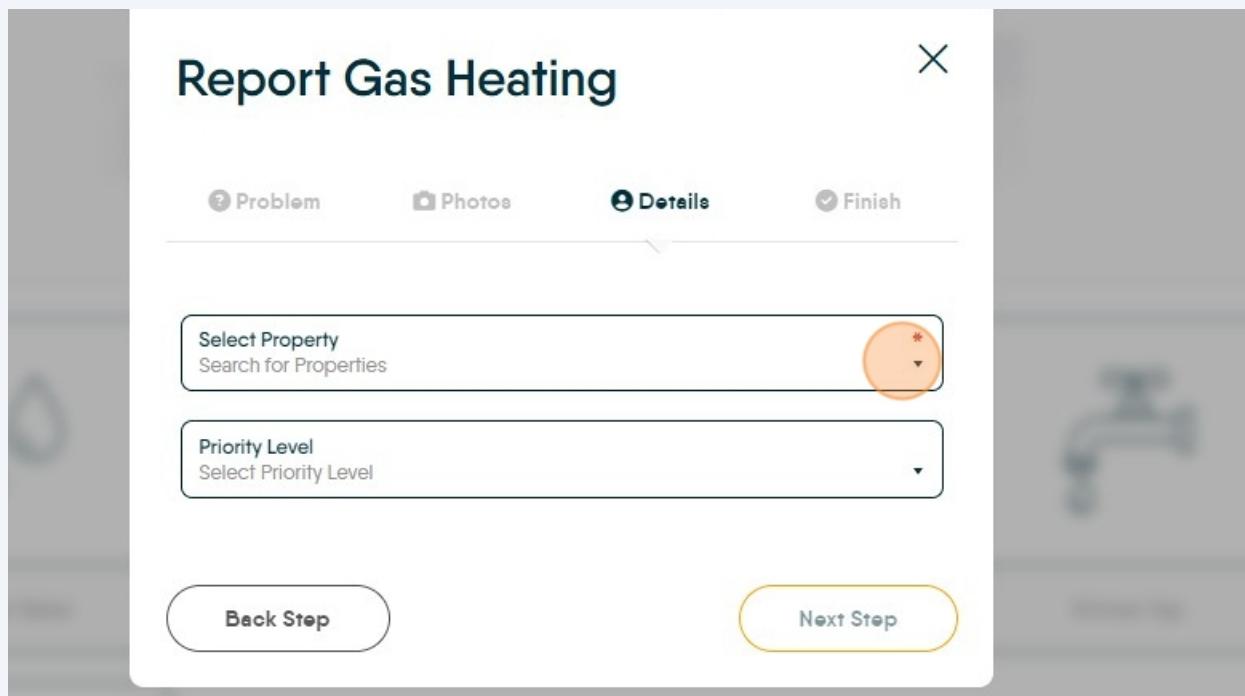
Click "Upload Photo". Find the images on your computer, phone or drag from the email

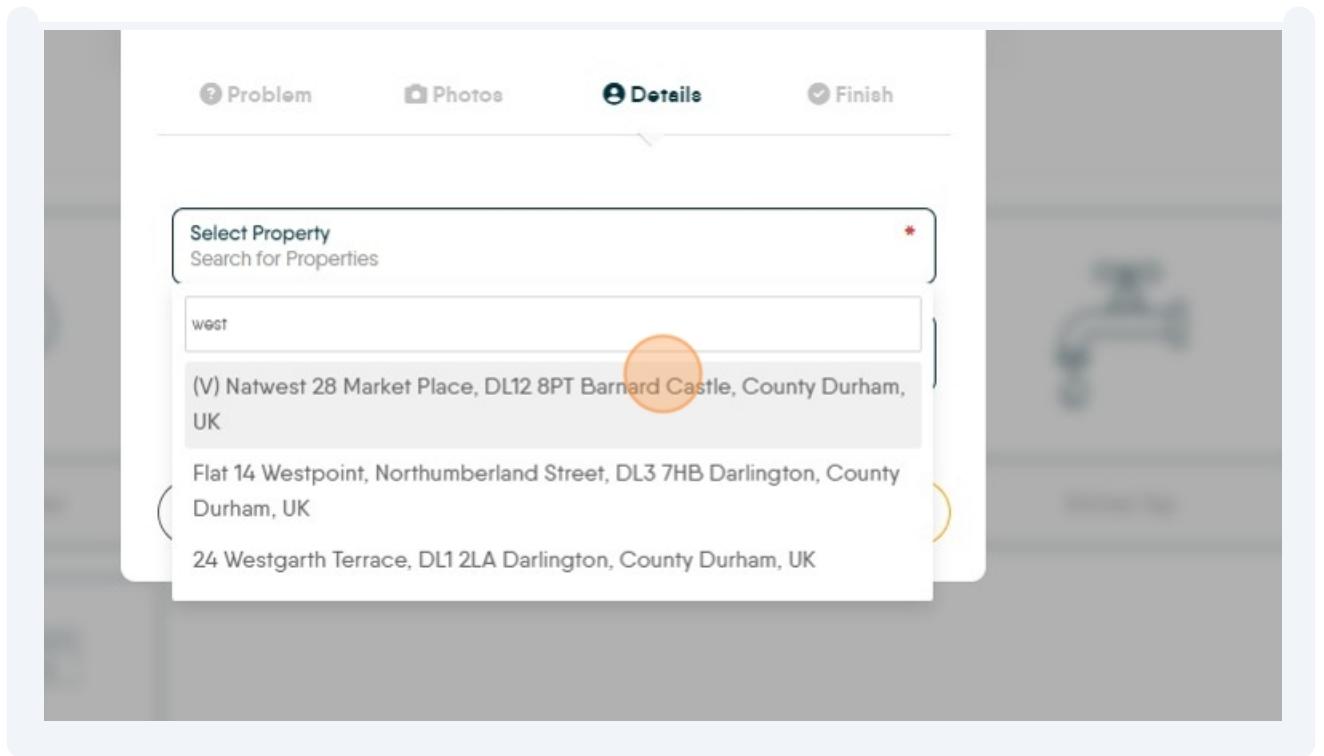


16 Click "Next Step"

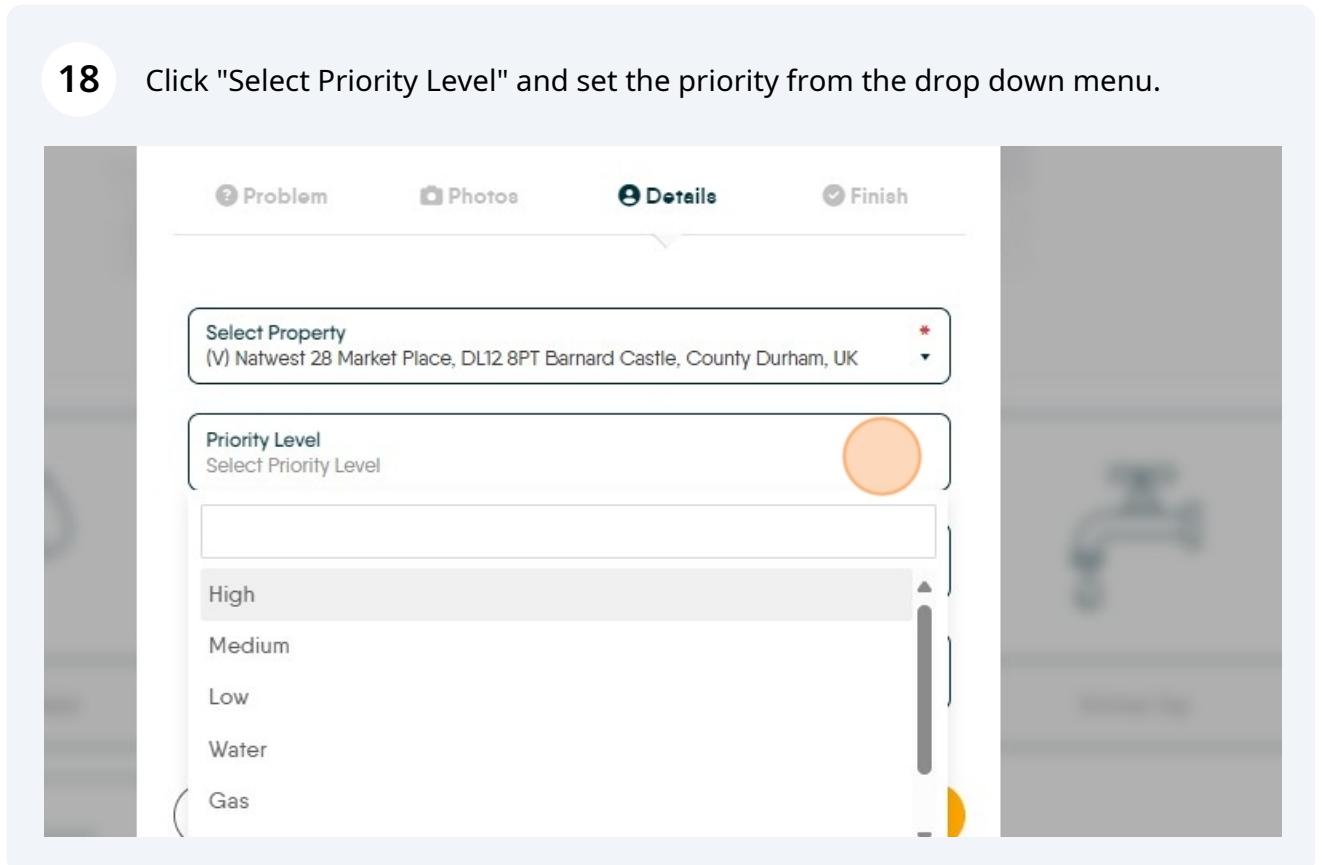


17 Click here to search for and select the property the maintenance is on





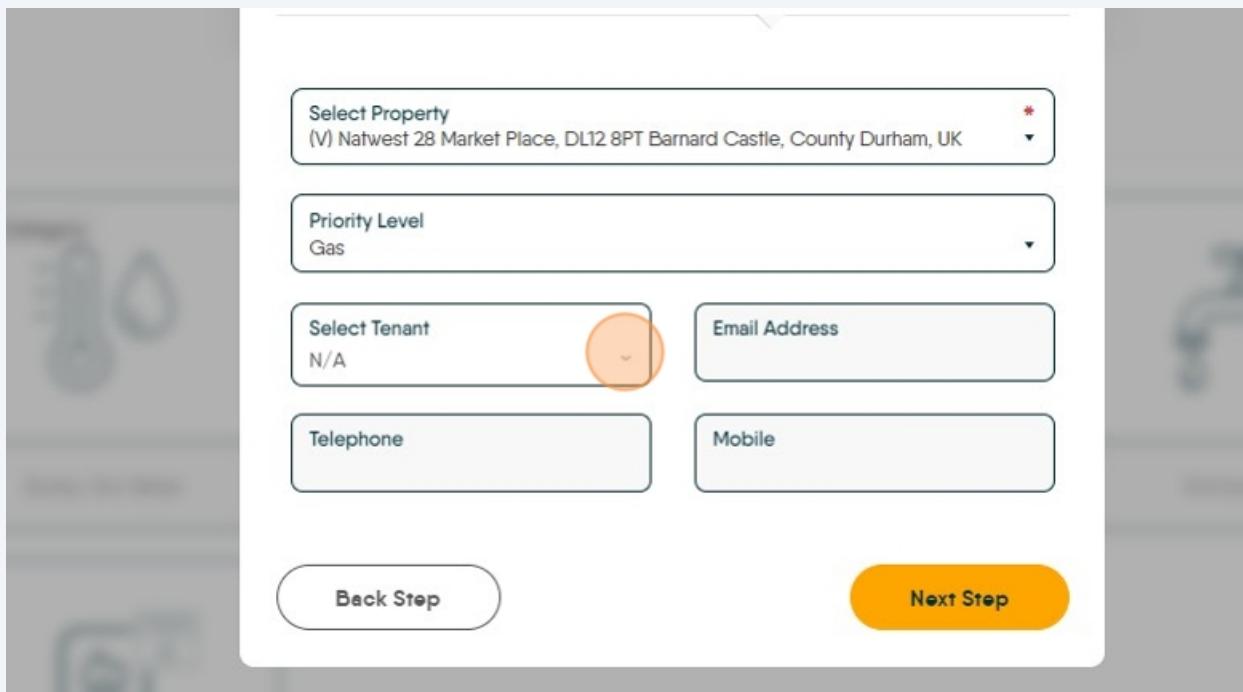
18 Click "Select Priority Level" and set the priority from the drop down menu.



Tip! Priority levels are useful as they are set in configuration and can be added to and edited to suit. Priority levels can be used for sorting job types easily and quickly.

19

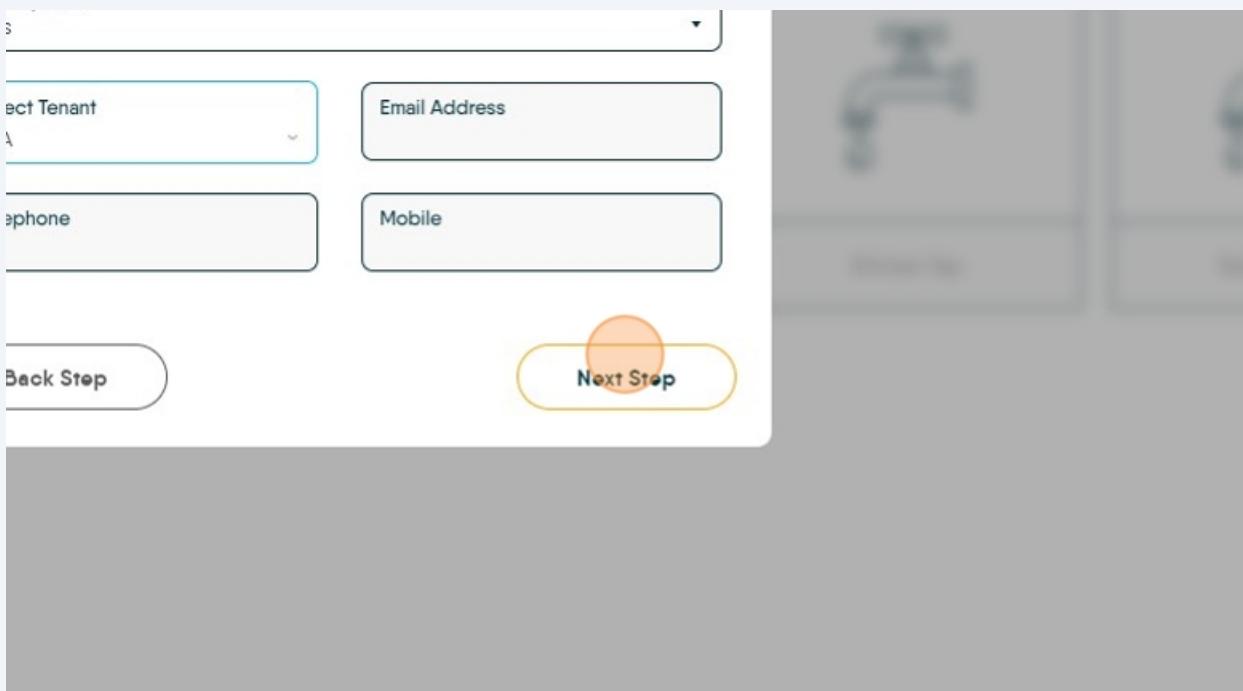
Click this dropdown to select the tenant report the task. This will populate the fields with the contact details for the tenant.



The screenshot shows a mobile application interface with a white background. At the top, there is a dropdown menu labeled "Select Property" with the value "(V) Natwest 28 Market Place, DL12 8PT Barnard Castle, County Durham, UK". Below this is a "Priority Level" dropdown set to "Gas". The next section is titled "Select Tenant" with the value "N/A", which is highlighted with an orange circle. To the right of this is an "Email Address" field. Below these are "Telephone" and "Mobile" fields. At the bottom are two buttons: "Back Step" on the left and "Next Step" on the right, with "Next Step" highlighted by an orange circle.

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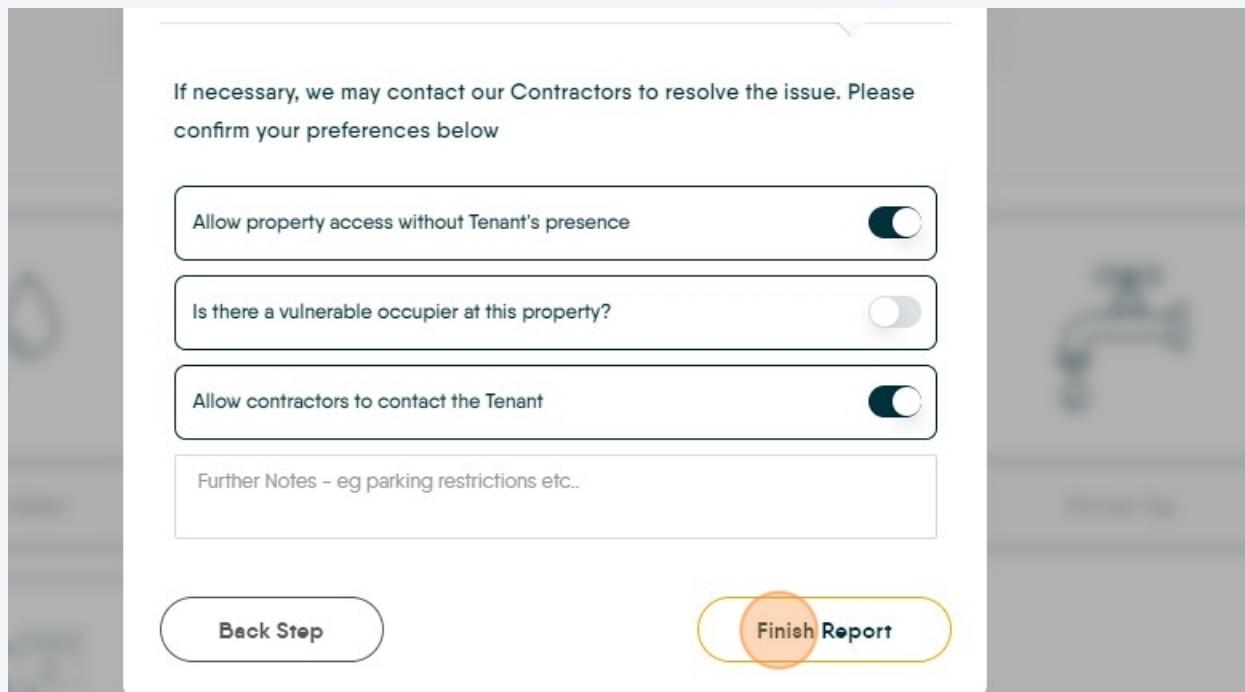
Click "Next Step"



The screenshot shows the same mobile application interface after the "Next Step" button was clicked. The "Select Tenant" dropdown is now empty. The "Email Address", "Telephone", and "Mobile" fields remain the same as in the previous step. The "Back Step" button is on the left, and the "Next Step" button is on the right, both within their respective rounded rectangular buttons. The "Next Step" button is highlighted with an orange circle.

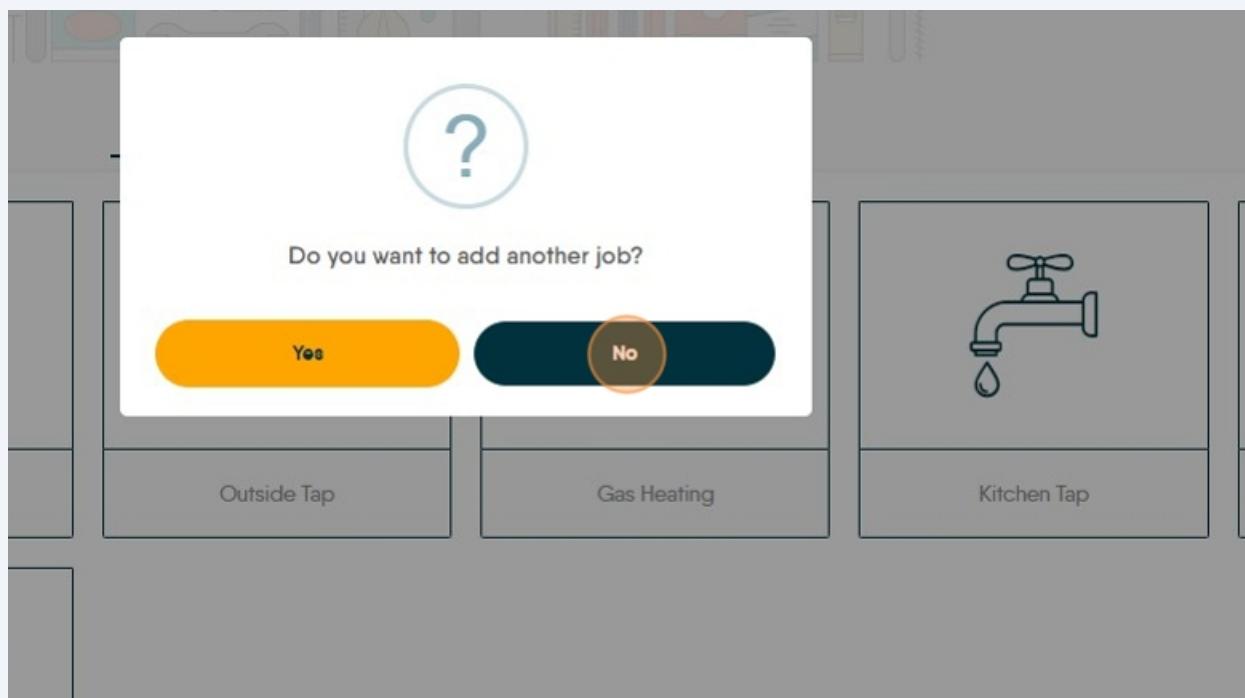
21

The final screen allows contact preferences to be set, also further notes to be added for the contractor. Click "Finish Report"



22

Click "No"



This is the job created, all that is required is for the job to be assigned to a contractor.