

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.

A screenshot of the MyDay screen in the iamproperty CRM system. The screen has a white background with a dark blue header. The main heading is "Welcome back, Training" in a large, bold, dark blue font. Below the heading is a navigation bar with three items: a yellow button with a plus icon and the text "Add New Record", a link with a clipboard icon and the text "View Property Management" (which is circled in orange), and a link with a cloud icon and the text "Visit Help Centre". Below the navigation bar is a search bar with the placeholder text "Search all records" and a magnifying glass icon on the right. At the bottom of the screen are two green buttons: "Today's events" with a calendar icon and "My tasks" with a checkmark icon.

Welcome back, Training

+ Add New Record

View Property Management




Visit Help Centre

Search all records

Today's events





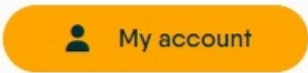
My tasks


3 Then in Property Management, click here.

Jobs Outstanding 2	Jobs Offered 0	Jobs Assigned 0
Create Job + 	My Jobs 	Feedback Centre 

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

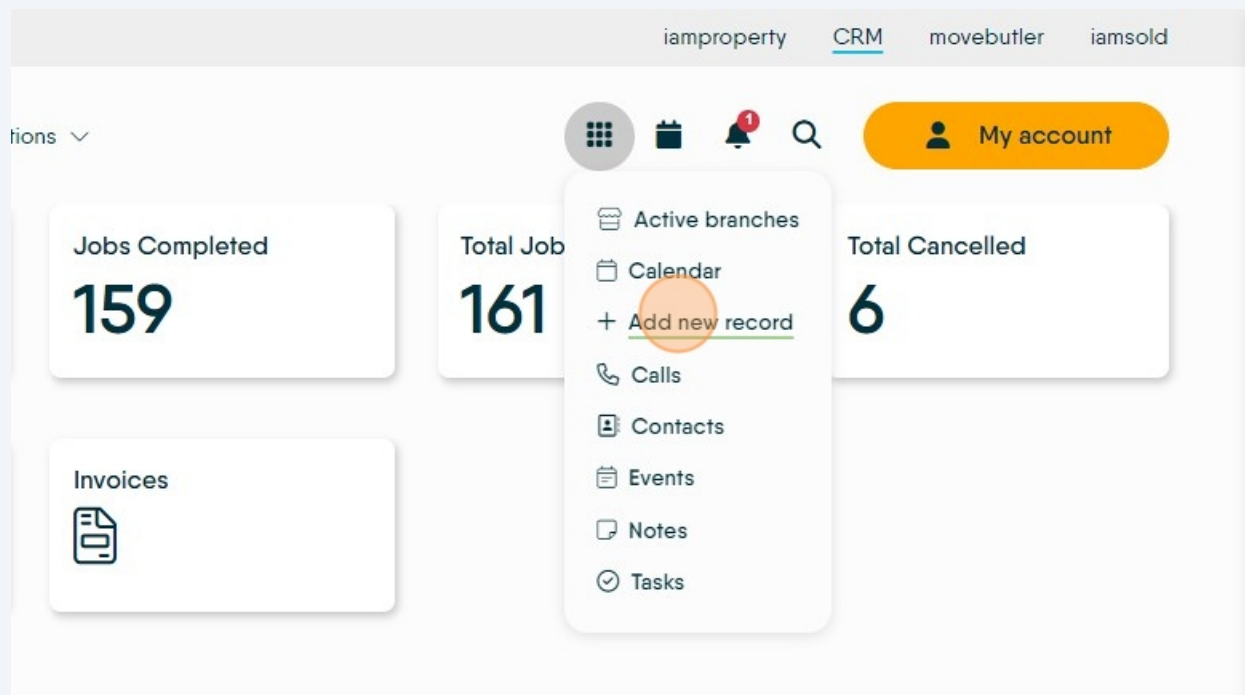
iamproperty CRM movebutler iamsold

ifications ▾     

Jobs Completed 159	Total Jobs 161	Total Cancelled 6
Invoices 		

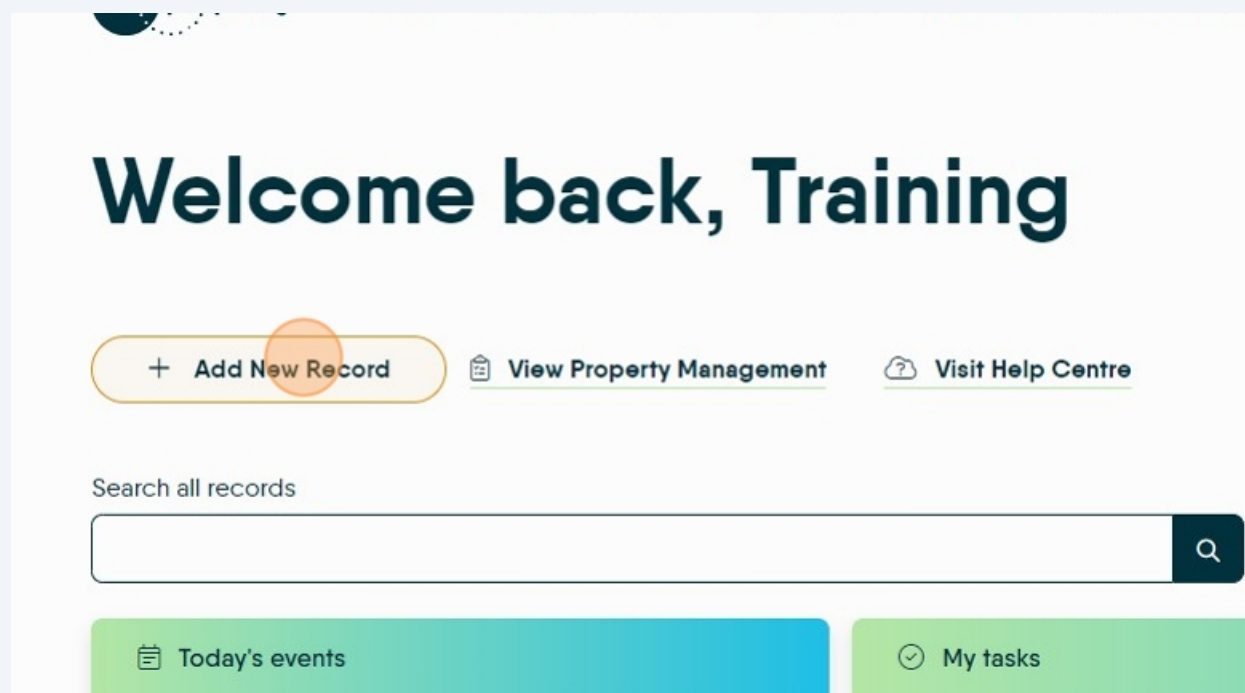
5

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

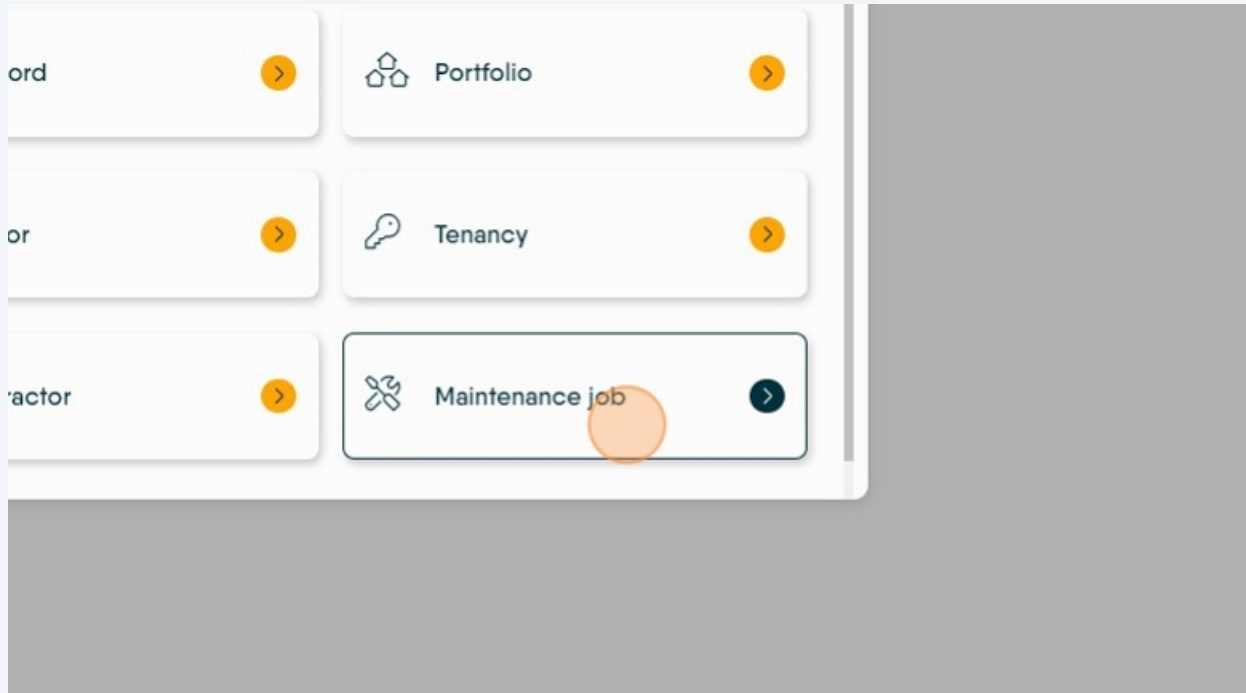


6

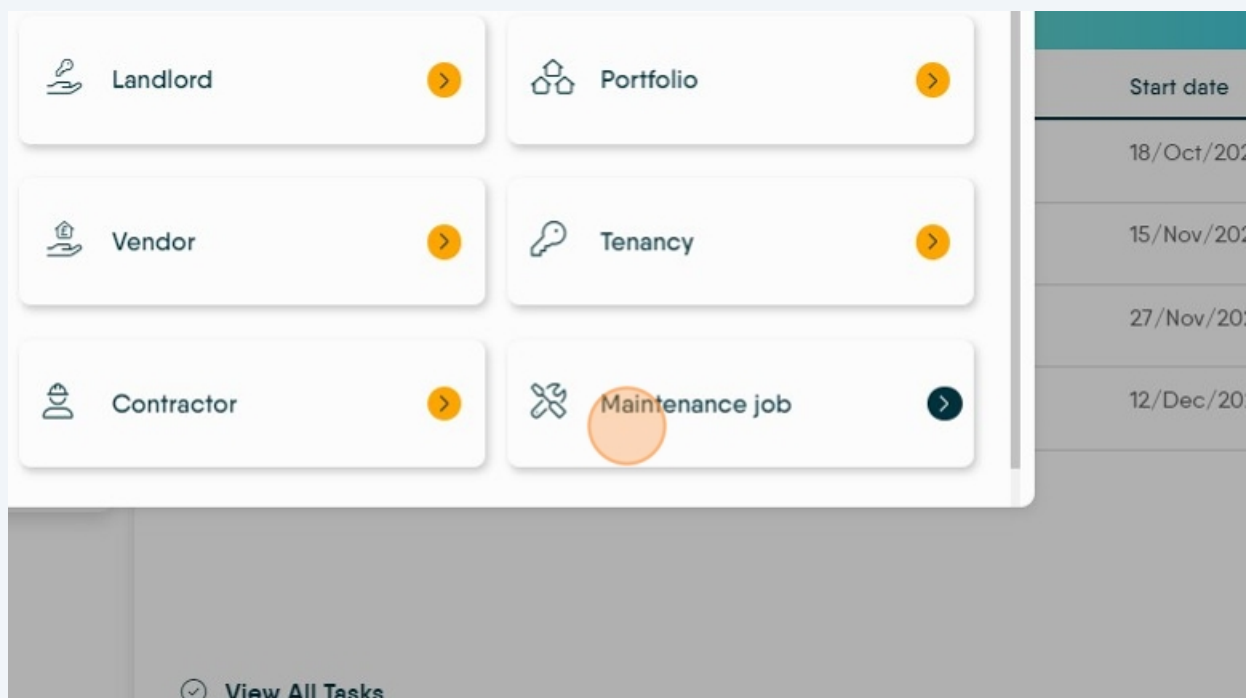
From MyDay screen click "Add New Record"



7 Click "Maintenance job"



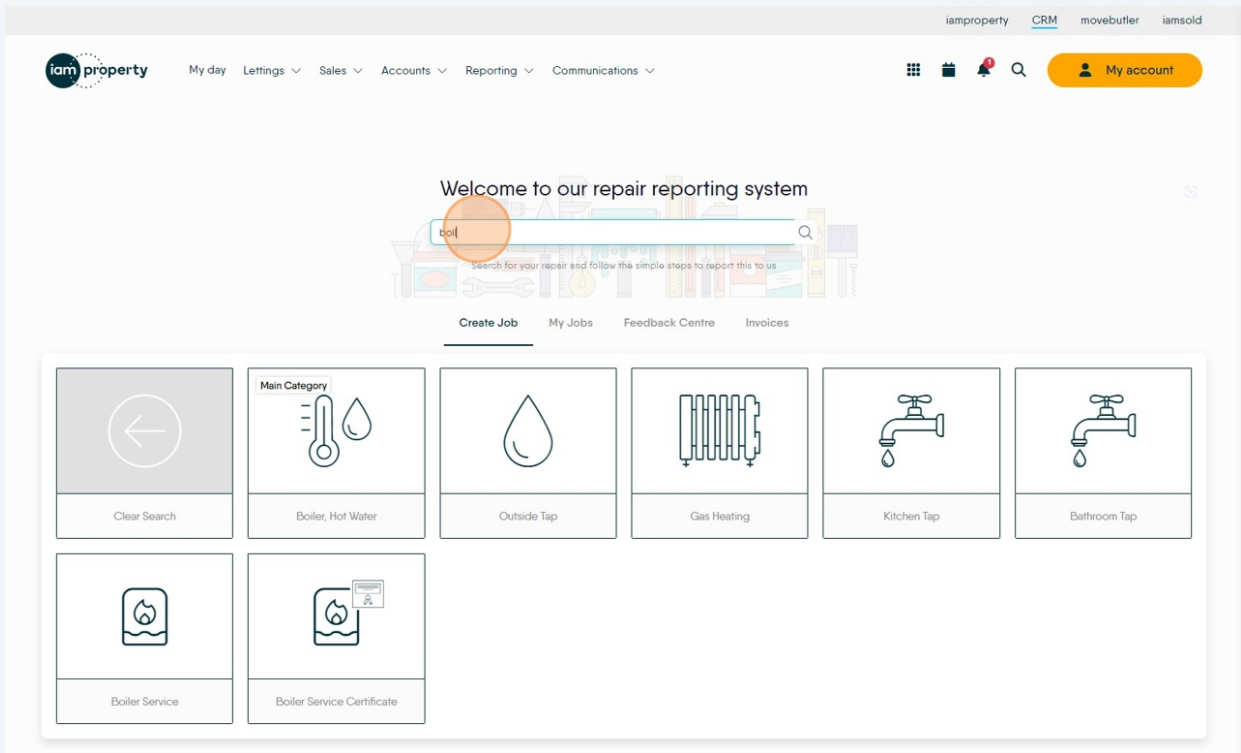
8 Click "Maintenance job"



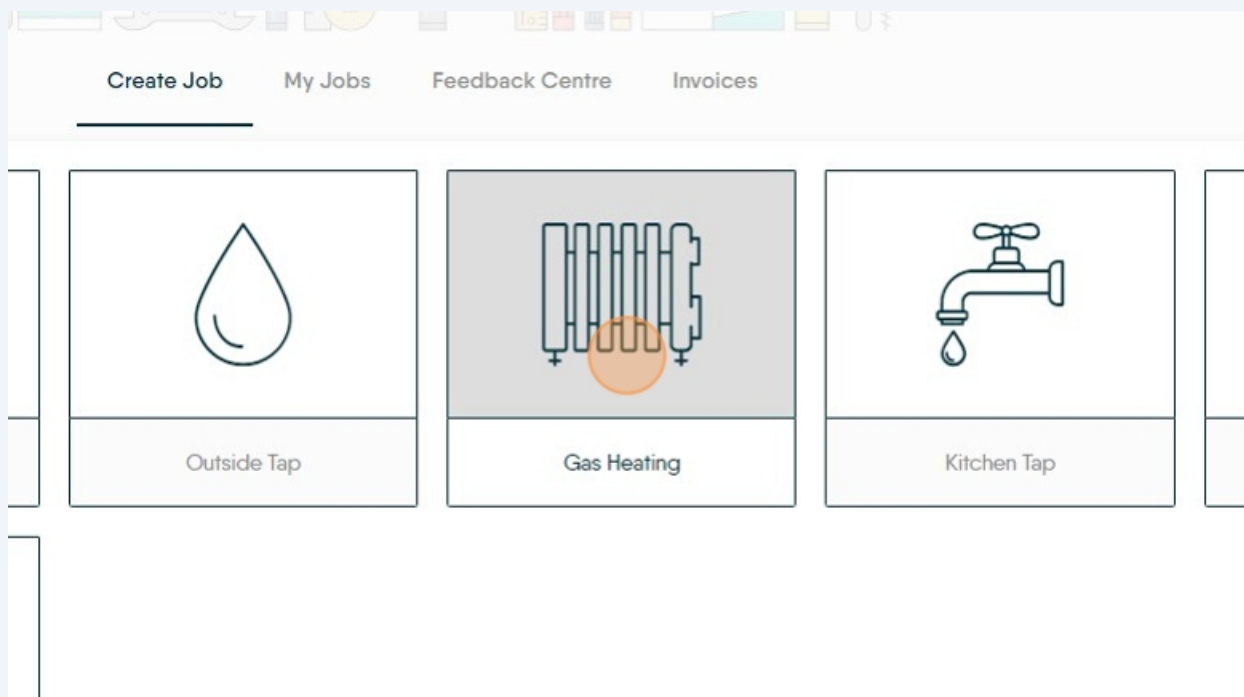
Creating the Maintenance Task

9

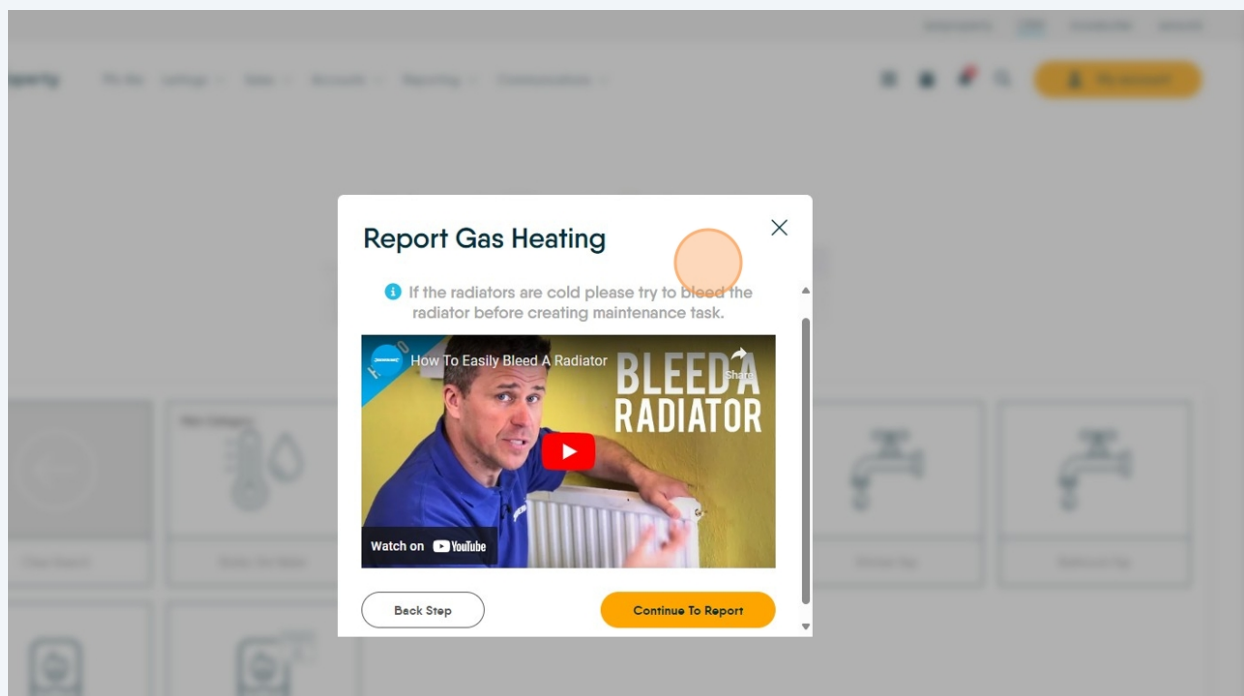
To search for the type of job you are raising click the "Enter a keyword here to get started..." field. Or, scroll through the list of categories (and sub categories) to find what you require.



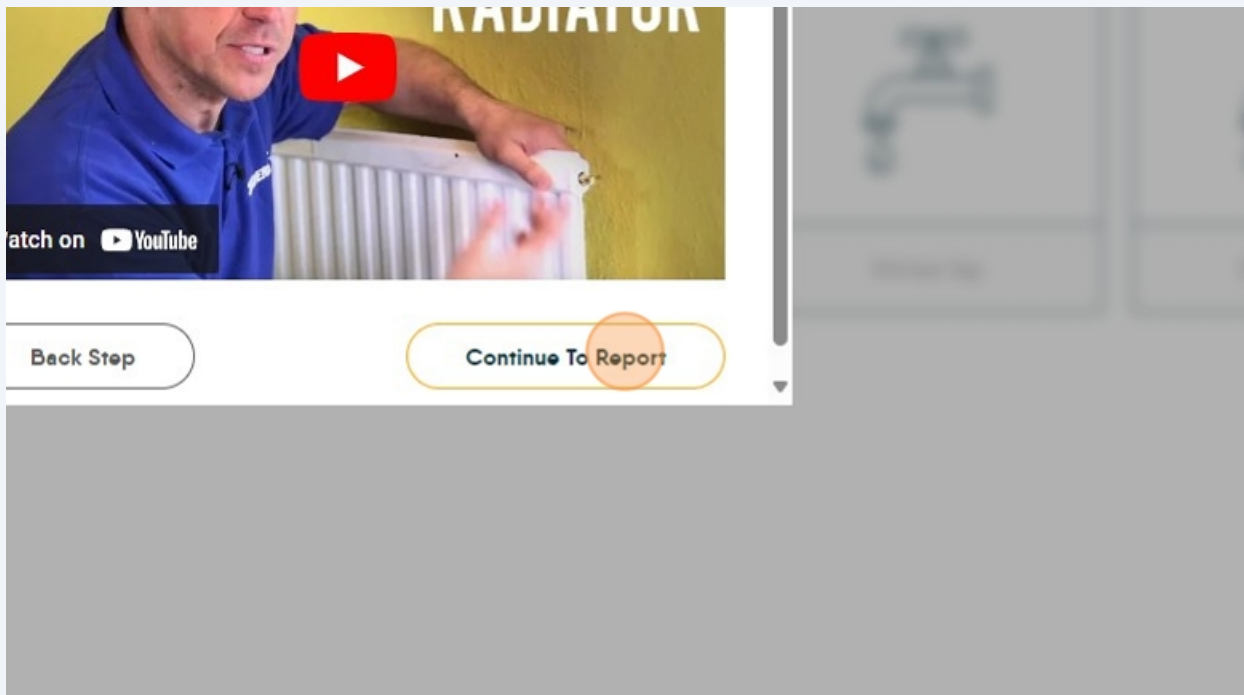
10 Click on to the category.



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

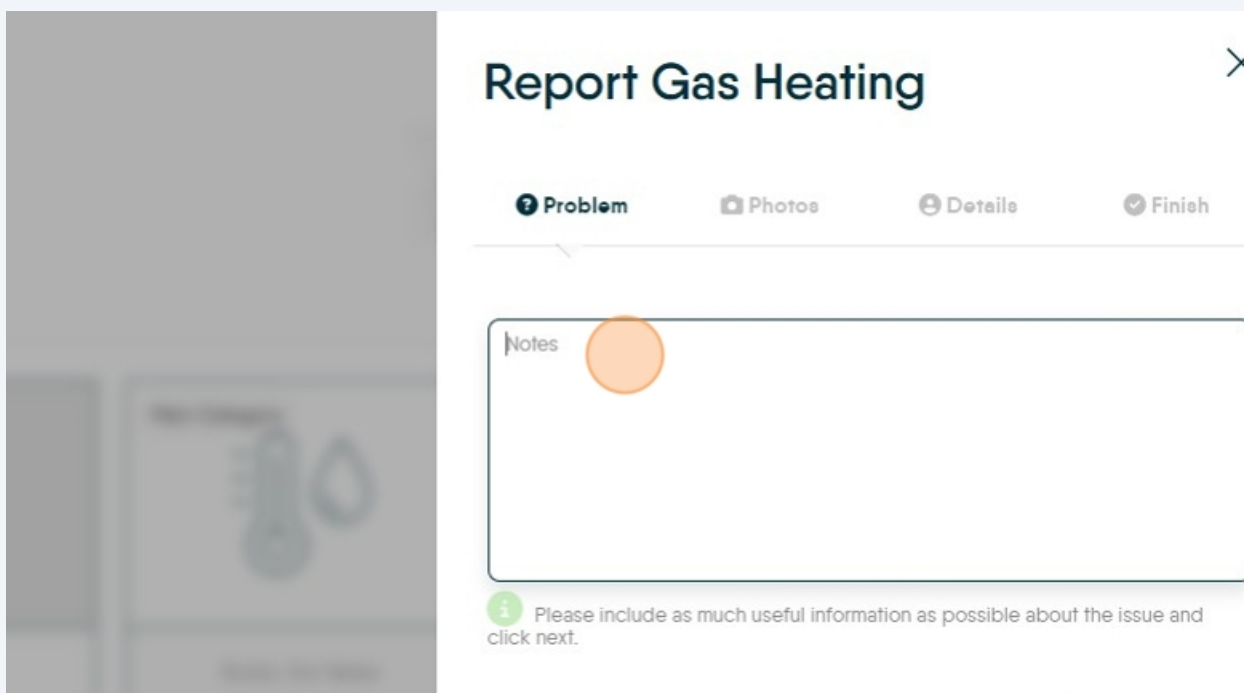


12 Click "Continue To Report"

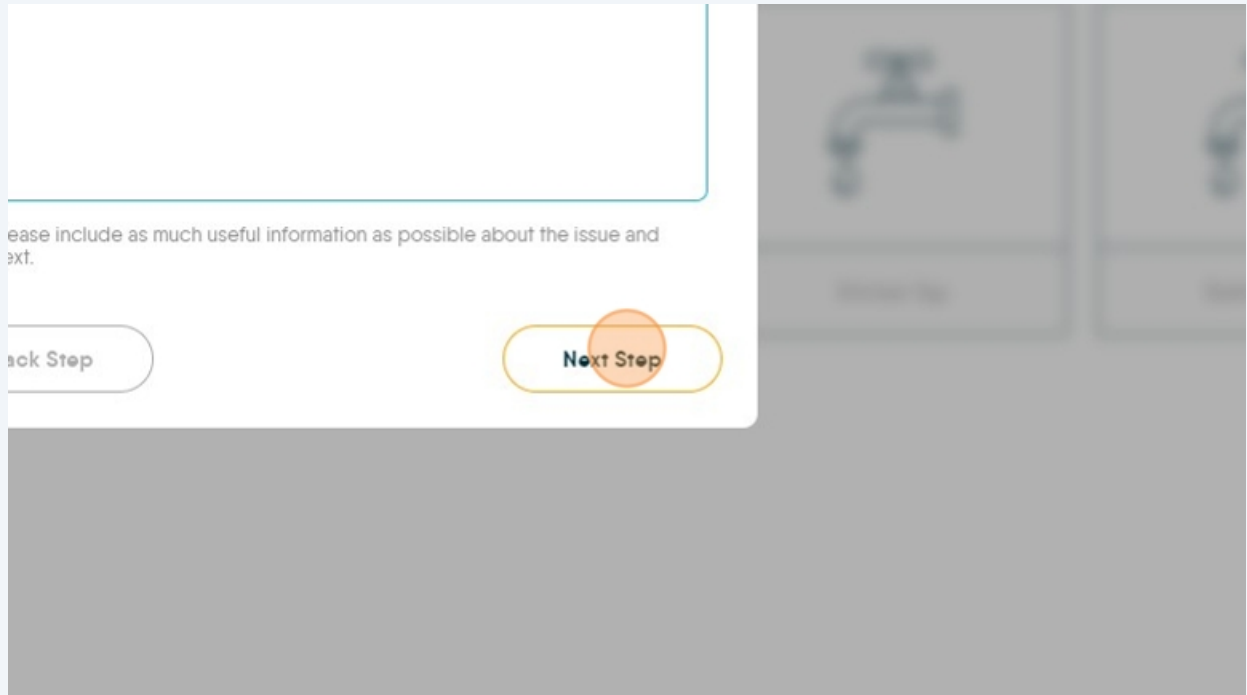


13 Click the "Notes" field. These notes are also shown on the Landlords statement as part of the maintenance task charging.

We advise keeping these notes brief and to the point.



14 Click "Next Step"

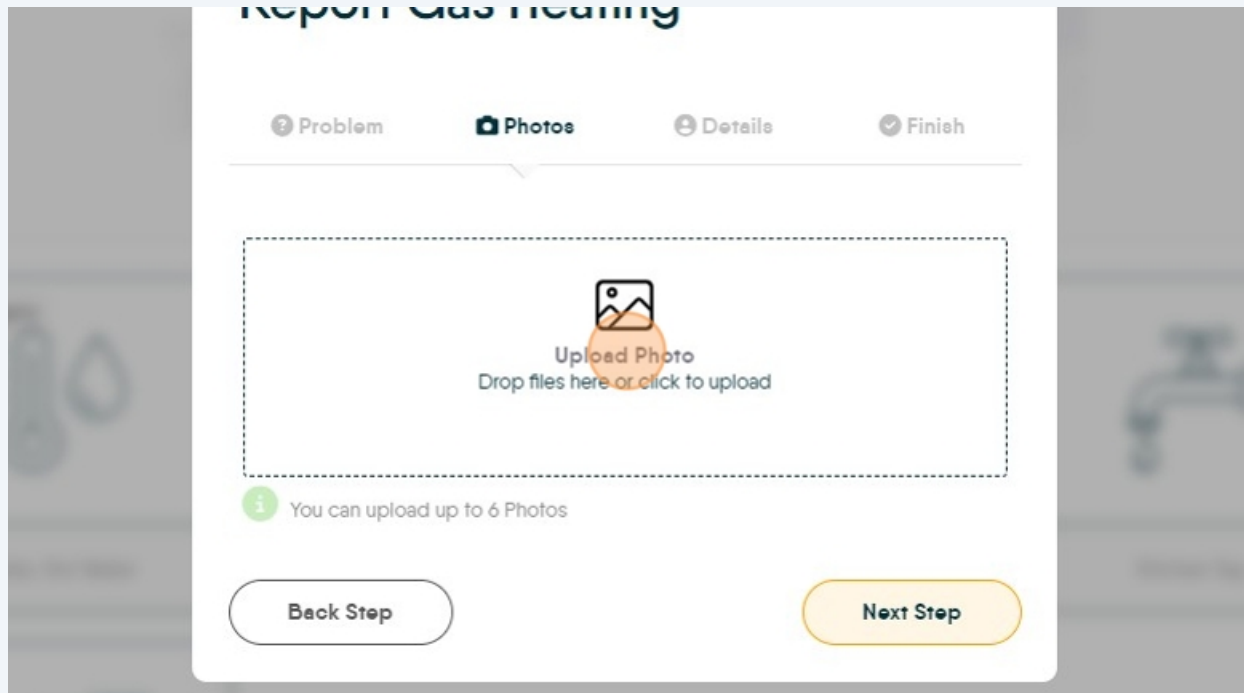


A screenshot of a web form. At the top, there is a large, empty rectangular text input field. Below this field, there is a line of instructional text: "Please include as much useful information as possible about the issue and next steps." At the bottom of the form, there are two buttons: "Back Step" on the left and "Next Step" on the right. The "Next Step" button is highlighted with a yellow border and a small orange circle above the text. The background of the form is light gray, and the entire form is set against a white background.

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



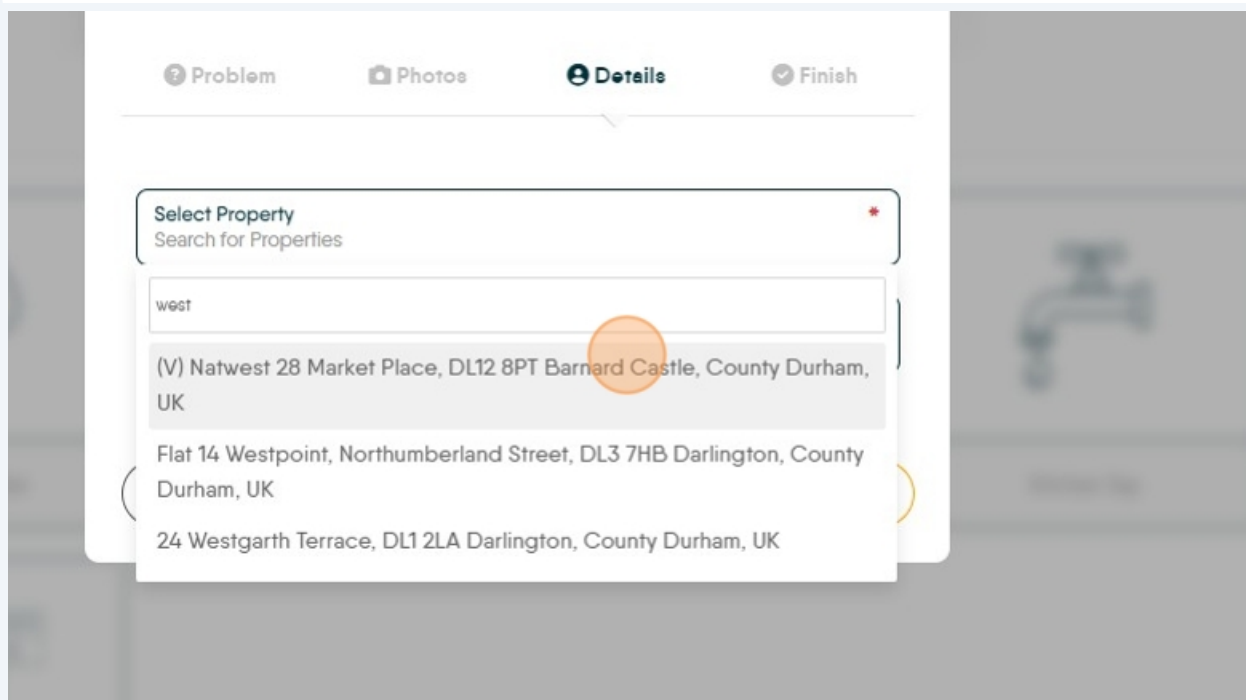
The screenshot shows a web form titled "Report Gas Reading". At the top, there are four tabs: "Problem" (with a question mark icon), "Photos" (with a camera icon and highlighted by an orange circle), "Details" (with a person icon), and "Finish" (with a checkmark icon). Below the tabs is a large dashed rectangular box for photo uploads. Inside this box is a camera icon, the text "Upload Photo", and "Drop files here or click to upload". An orange circle highlights the text "or click to upload". Below the box is a green information icon followed by the text "You can upload up to 6 Photos". At the bottom of the form are two buttons: "Back Step" and "Next Step".

16 Click "Next Step"

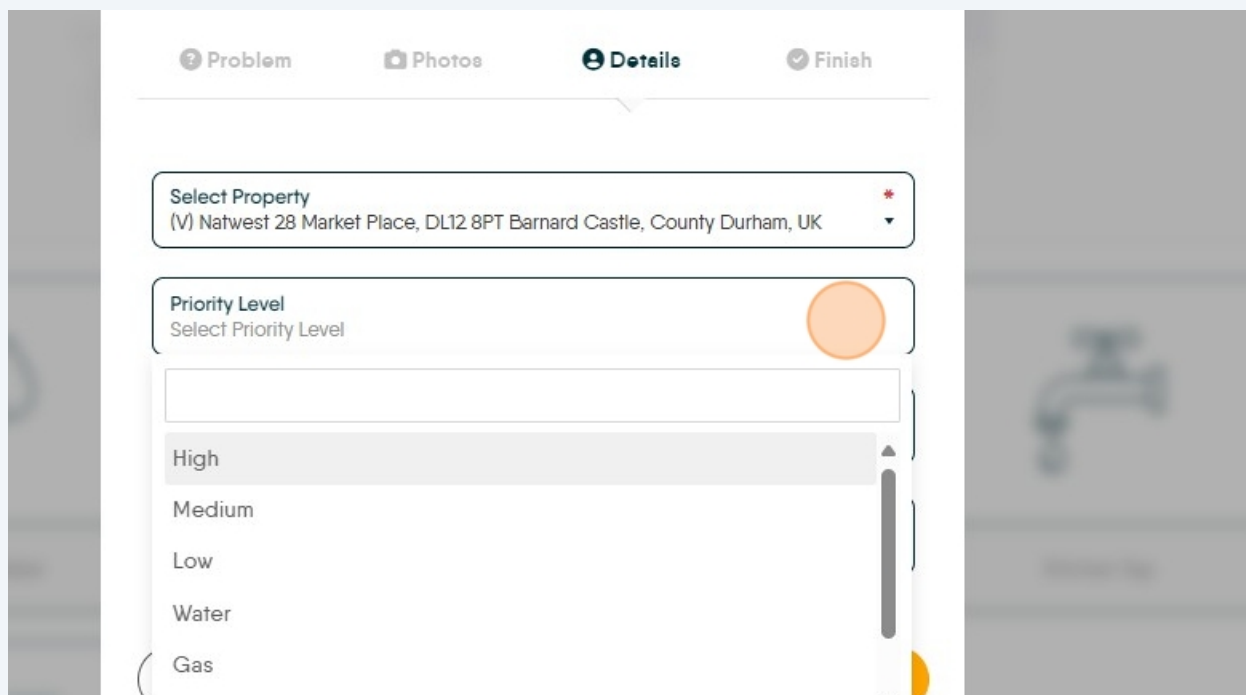
The screenshot shows a mobile application interface for reporting a problem. At the top, there is a progress bar with four steps: 'Problem' (with a question mark icon), 'Photos' (with a camera icon and currently selected), 'Details' (with a person icon), and 'Finish' (with a checkmark icon). Below the progress bar, there is a dashed rectangular box containing a photo of a gas furnace. Underneath the photo is a 'Remove file' button. Below the dashed box, there is a green information icon followed by the text 'You can upload up to 6 Photos'. At the bottom of the form, there are two buttons: 'Back Step' on the left and 'Next Step' on the right. The 'Next Step' button is highlighted with an orange circle.

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

The screenshot shows a mobile application interface for reporting a problem, specifically the 'Details' step. The title of the form is 'Report Gas Heating'. At the top, there is a progress bar with four steps: 'Problem' (with a question mark icon), 'Photos' (with a camera icon), 'Details' (with a person icon and currently selected), and 'Finish' (with a checkmark icon). Below the progress bar, there are two input fields. The first field is labeled 'Select Property' and has a placeholder text 'Search for Properties'. The second field is labeled 'Priority Level' and has a placeholder text 'Select Priority Level'. Both fields have a dropdown arrow on the right. At the bottom of the form, there are two buttons: 'Back Step' on the left and 'Next Step' on the right. The 'Next Step' button is highlighted with an orange circle.



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



i 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.

A screenshot of a web form with the following fields and buttons:

- Select Property**: A dropdown menu showing "(V) Natwest 28 Market Place, DL12 8PT Barnard Castle, County Durham, UK" with a red asterisk and a downward arrow.
- Priority Level**: A dropdown menu showing "Gas" with a downward arrow.
- Select Tenant**: A dropdown menu showing "N/A" with a downward arrow. An orange circle highlights this field.
- Email Address**: A text input field.
- Telephone**: A text input field.
- Mobile**: A text input field.
- Back Step**: A button with a rounded rectangle border.
- Next Step**: A button with a rounded rectangle border and an orange gradient.

20

Click "Next Step"

A screenshot of the same web form as in step 19, but with the **Next Step** button highlighted by an orange circle. The **Select Tenant** dropdown is also highlighted with a blue border. The **Back Step** button is visible on the left.

21

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

If necessary, we may contact our Contractors to resolve the issue. Please confirm your preferences below

Allow property access without Tenant's presence ☒

Is there a vulnerable occupier at this property? ☐

Allow contractors to contact the Tenant ☒

Further Notes - eg parking restrictions etc..

Back Step Finish Report

22

Click "No"

?

Do you want to add another job?

Yes No

Outside Tap Gas Heating Kitchen Tap

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