

Property Management - Adding a Maintenance Job



This guide is essential for property managers looking to efficiently add maintenance jobs within the iamproperty CRM system.

It provides a step-by-step process that simplifies the task, of adding Maintenance jobs to CRM and allocating them to a contractor, ensuring that no crucial details are overlooked.

By following the instructions, users can streamline their workflow and improve communication regarding maintenance issues.

To Access Property Management

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

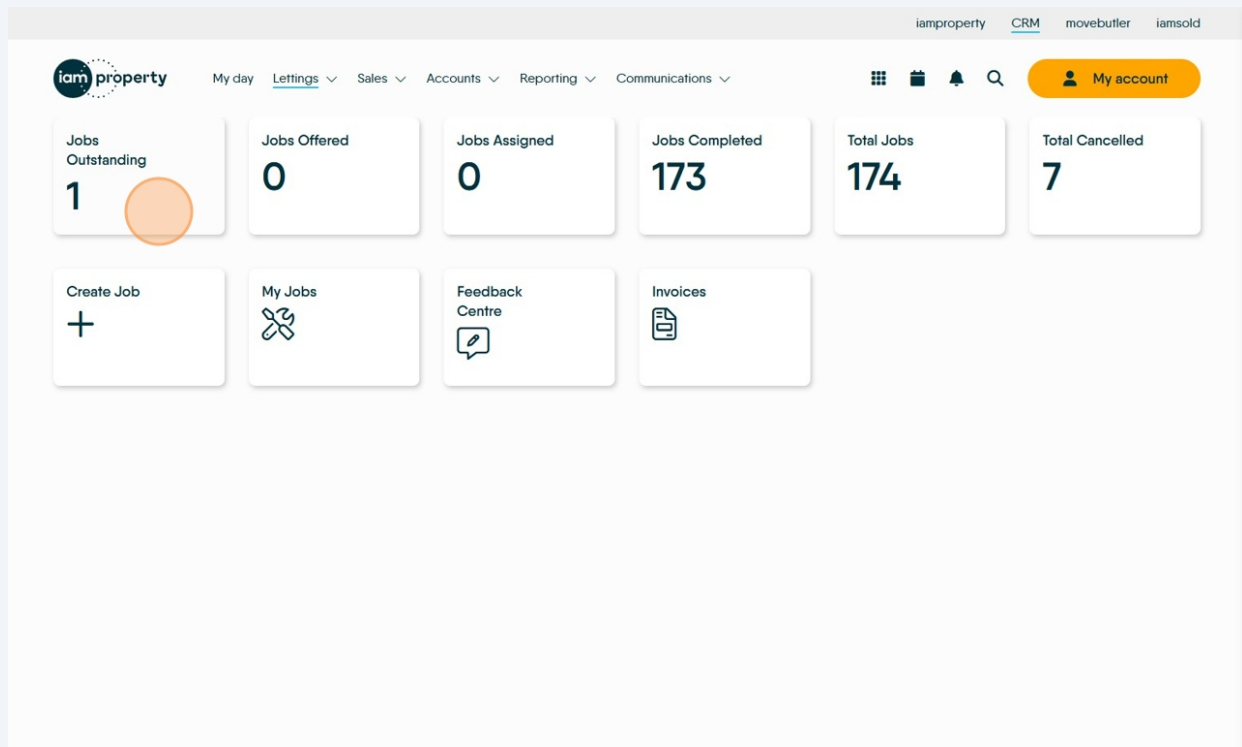
- 2 Click "View property management"

The screenshot displays the iamproperty CRM dashboard. At the top, there's a navigation bar with the iamproperty logo, a menu (My day, Lettings, Sales, Accounts, Reporting, Communications), and user icons (iamproperty, CRM, movebutler). Below the navigation bar, a large heading says "Welcome back, Training". Underneath, there are three buttons: "+ Add New Record", "View Property Management" (which is circled in orange), and "Visit Help Centre". Below these buttons is a search bar labeled "Search all records". At the bottom, there are two panels: "Today's events" and "My tasks". The "My tasks" panel contains a table with columns: Status, Name, Priority, Start date, and Due date. The table lists three tasks, all with a status of "Not Started".

Status	Name	Priority	Start date	Due date
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

3 This will take you to the Property Management Dashboard.

From here you can manage and view a range of information.



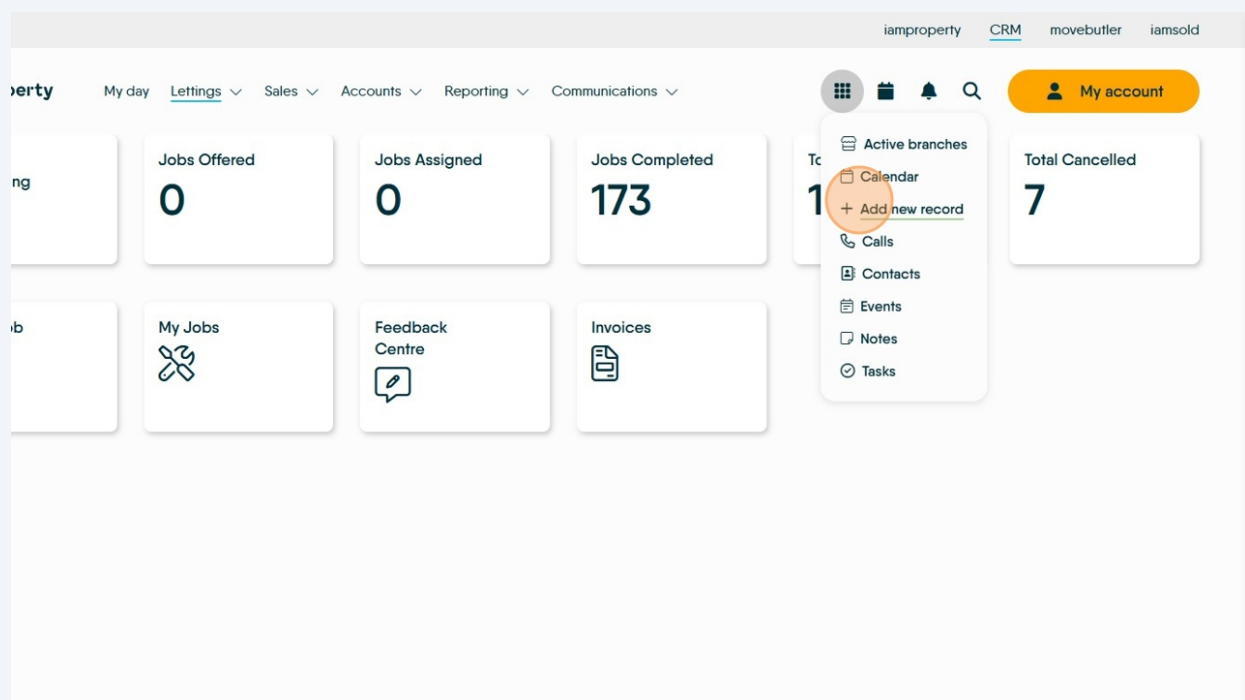
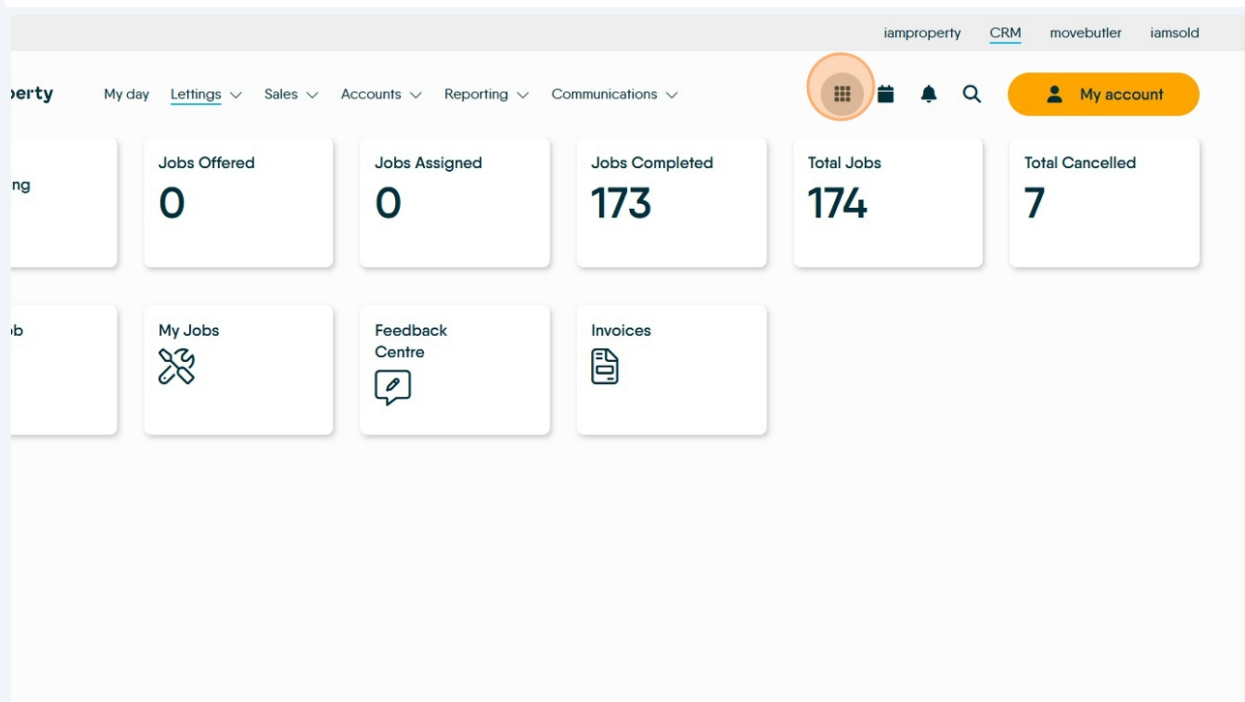
Creating a Maintenance Task

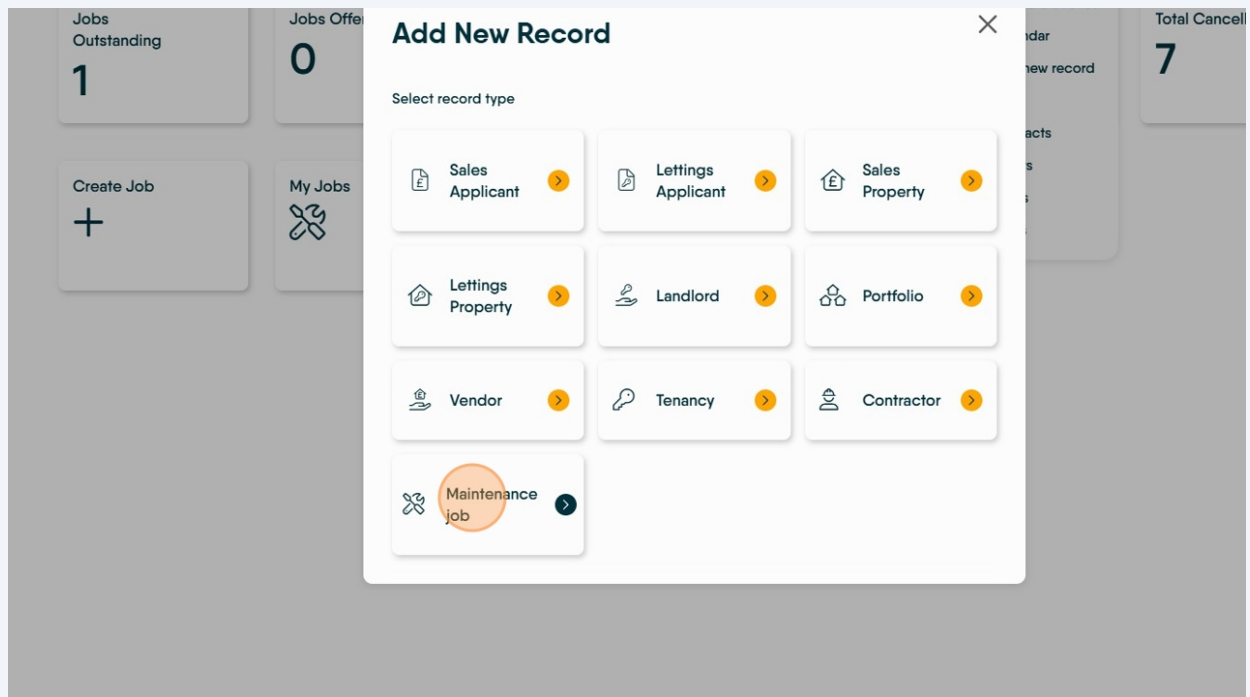


There are a number of ways to create a maintenance task, you do not need to be in the Property Management module to do this, the following slides will show how to create a new maintenance job.

4

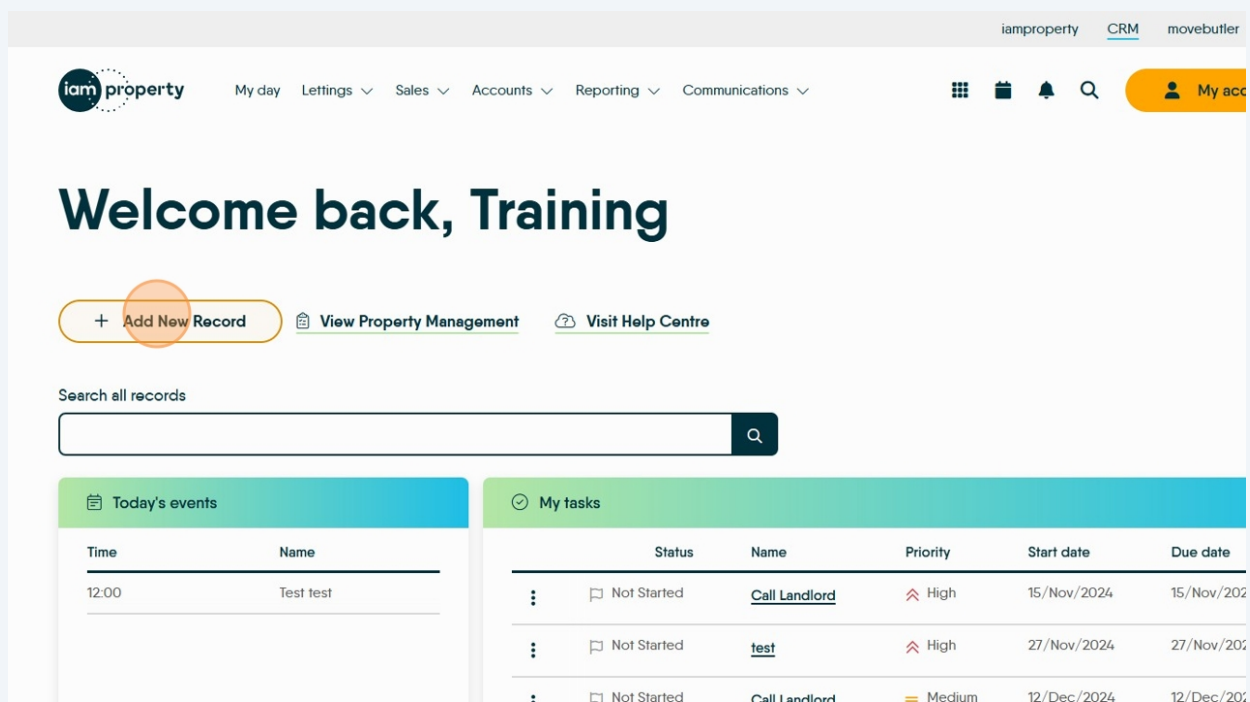
From the 'Bento Menu'
Click "Add new record"
Click "Maintenance job"

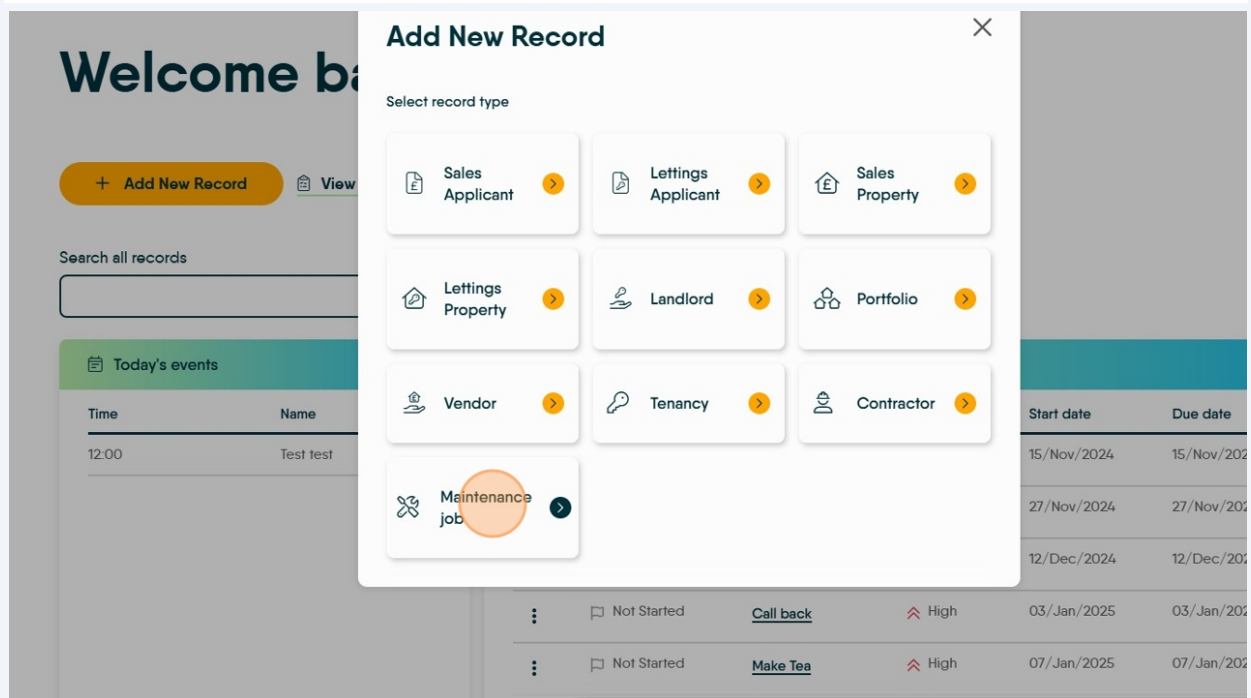




5 The alternate way to add a maintenance job.

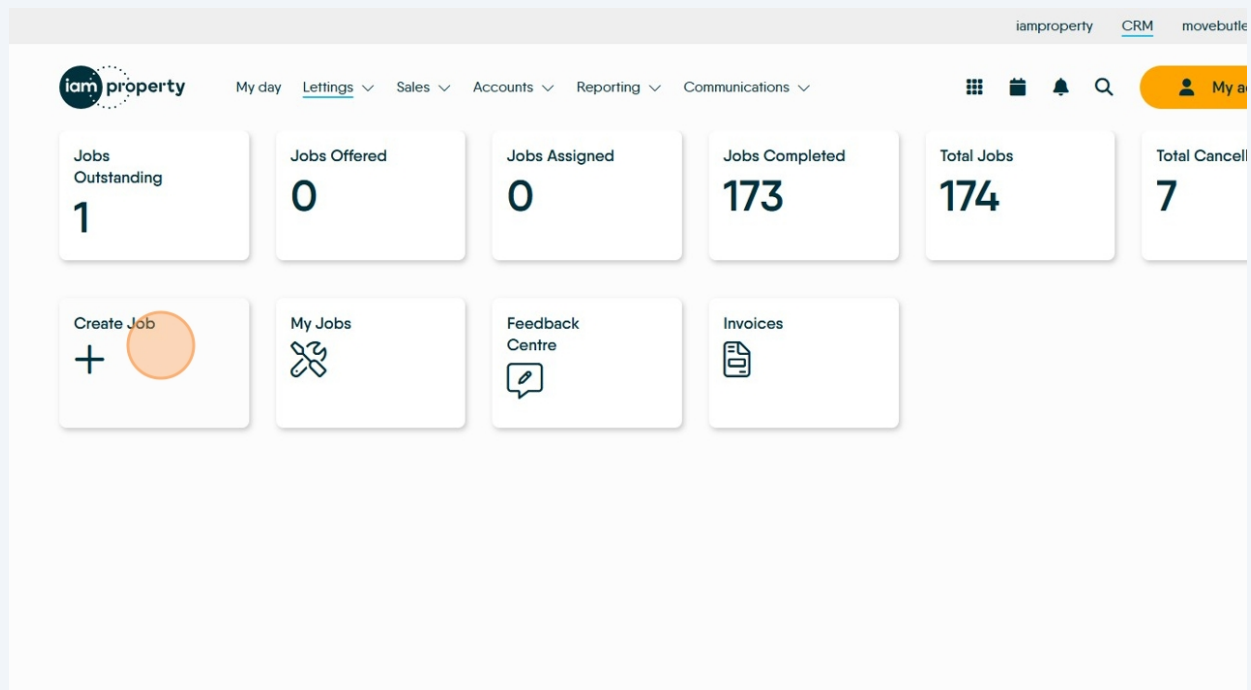
From the 'MyDay' screen. Click "Add New Record"
Click "Maintenance job"





6 or from within the Property Management Dashboard.

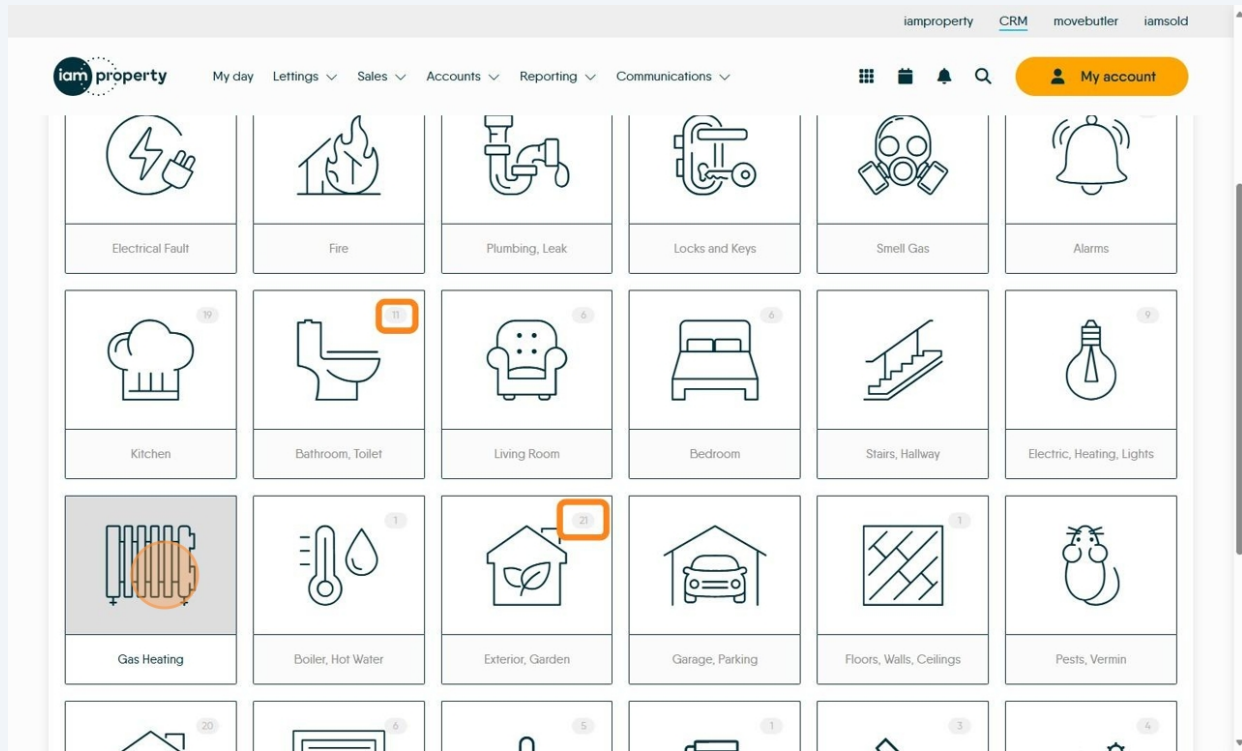
All these options lead to the same screen.



Creating the Job

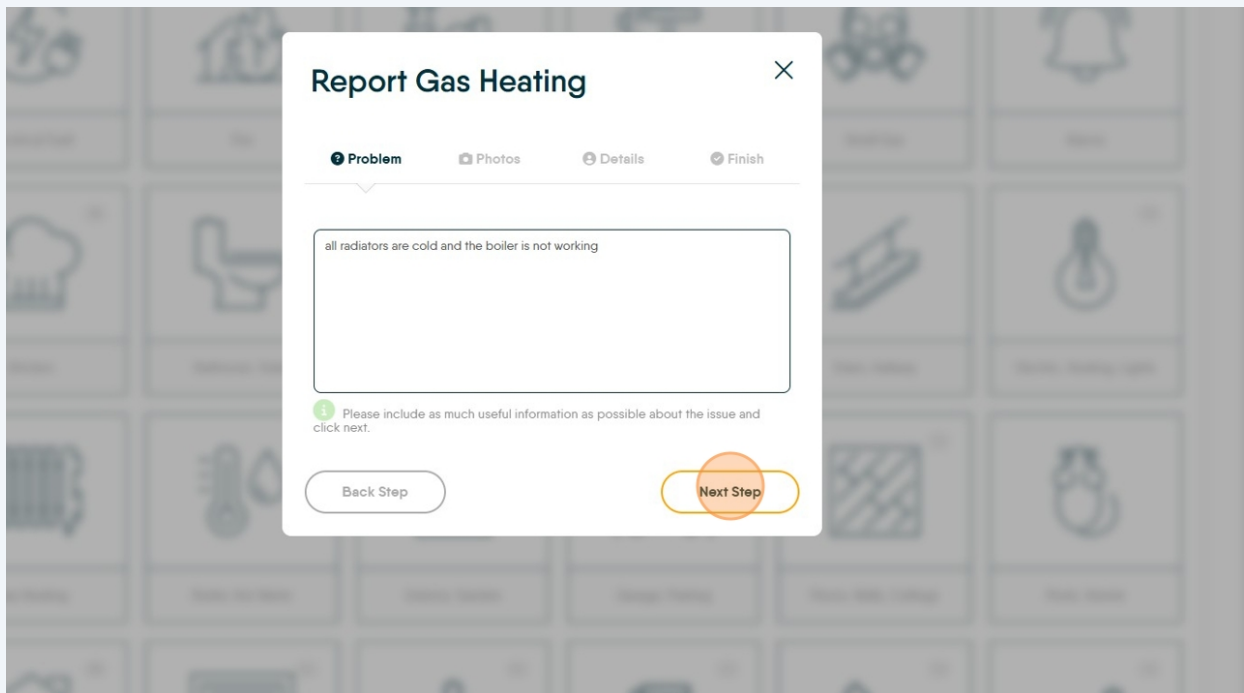
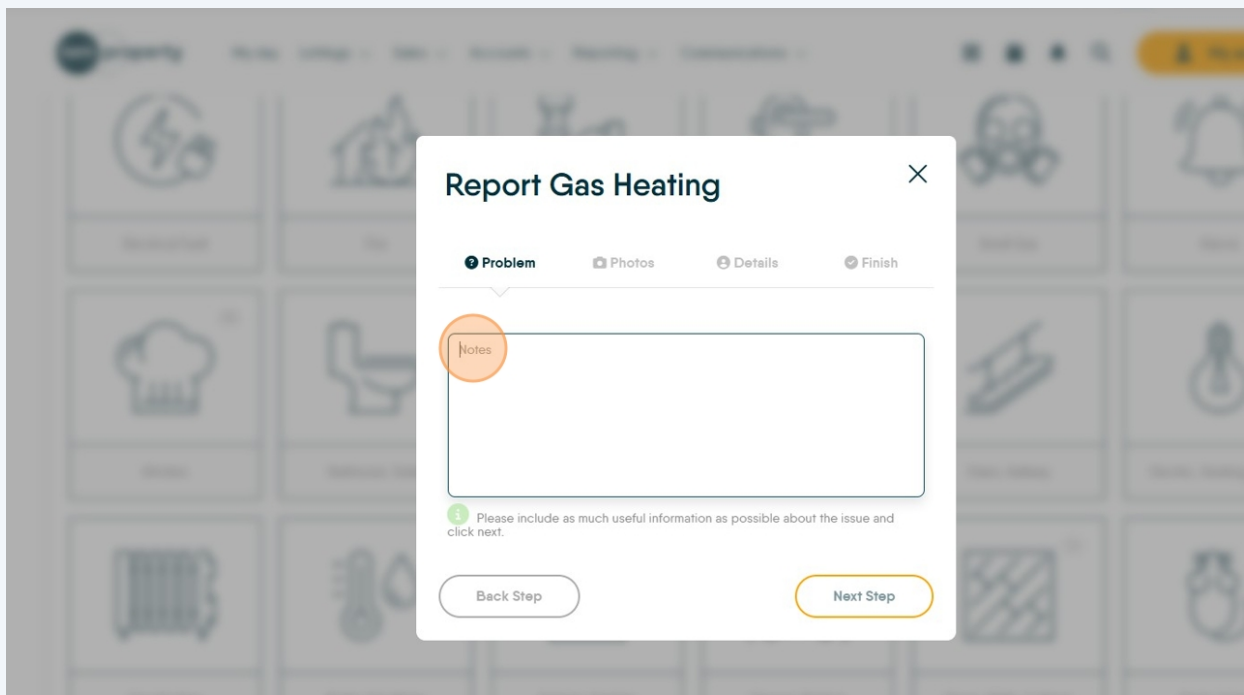
7

From the first screen shown select the task type that fits your issue the best. Some tiles have sub categories, these have a number in the top right corner (as highlighted).



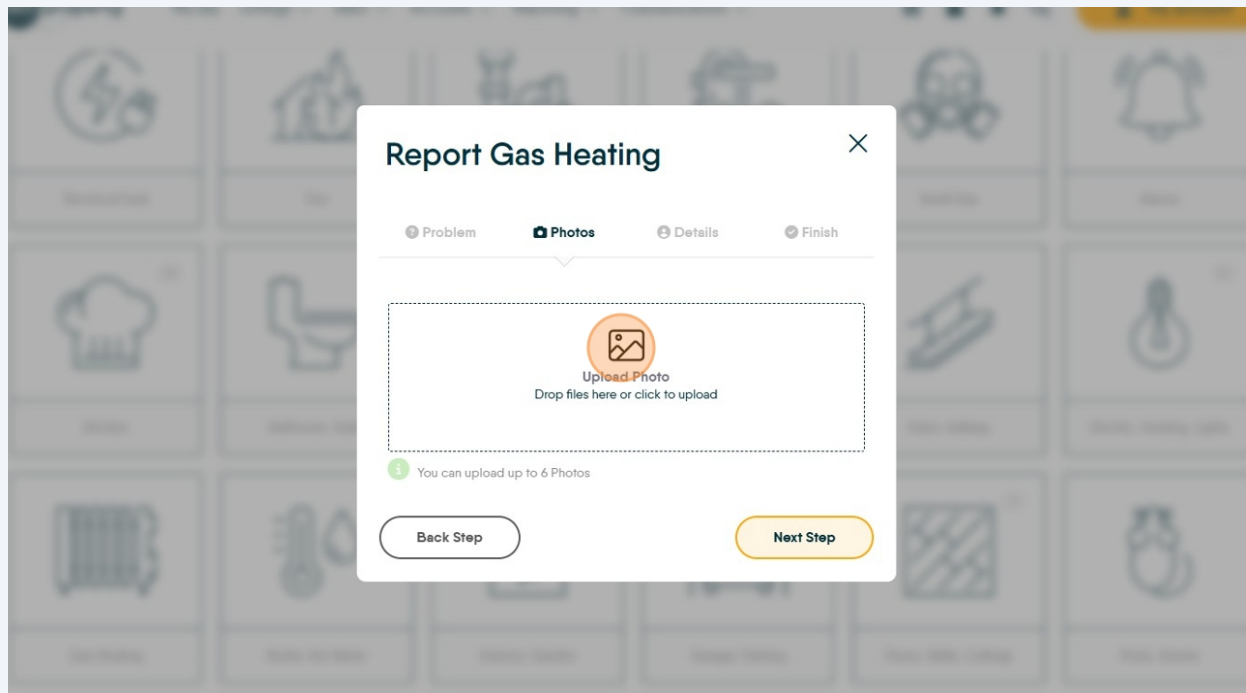
8

Once the task category has been selected you may see an information/warning video if you have set one, then add the job information. Click the "Notes" field, this should be a brief description of the task. Anything added here will be shown on the Landlord Statement and can be visible to the Contractor and Tenant. Click "Next Step".



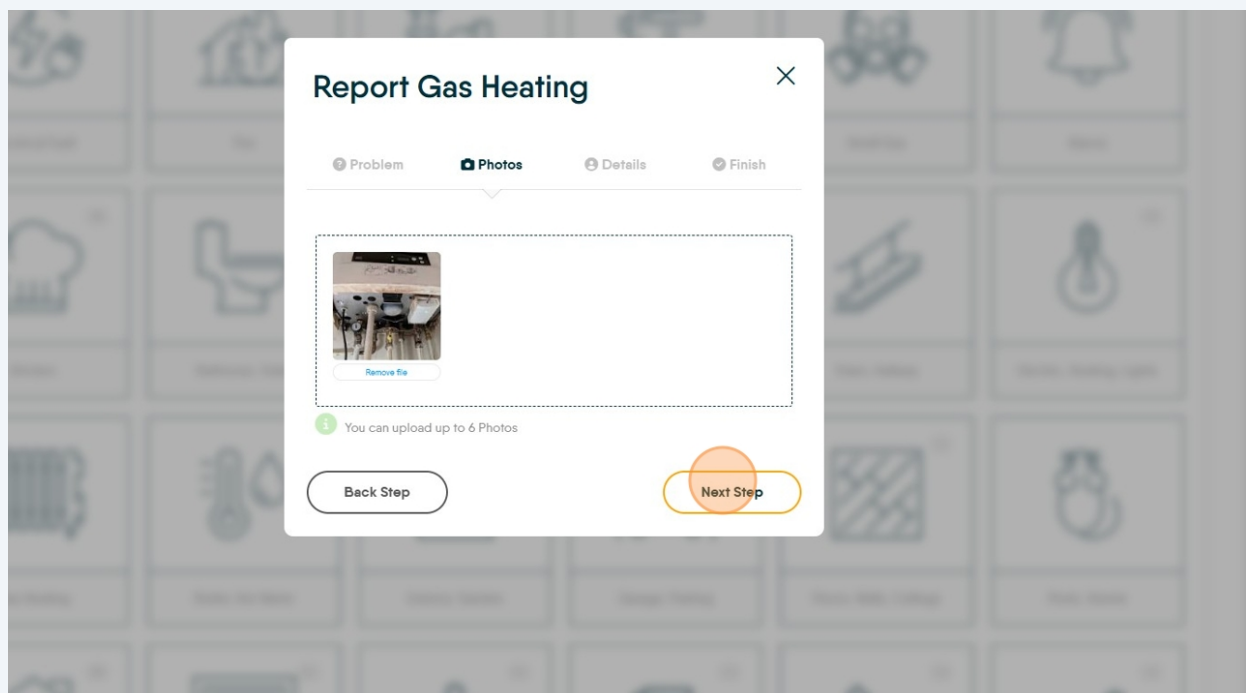
9

Then click here to add any images (upto 6) to support the contractor in diagnosing and repair of the issue.

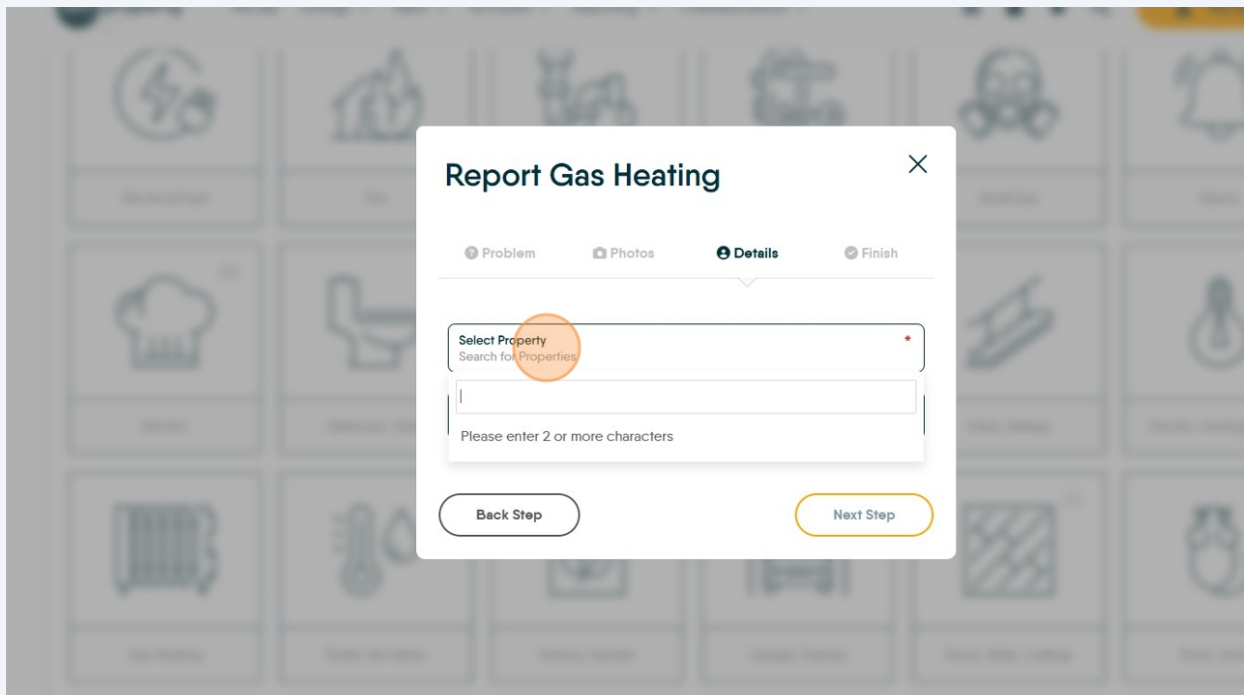


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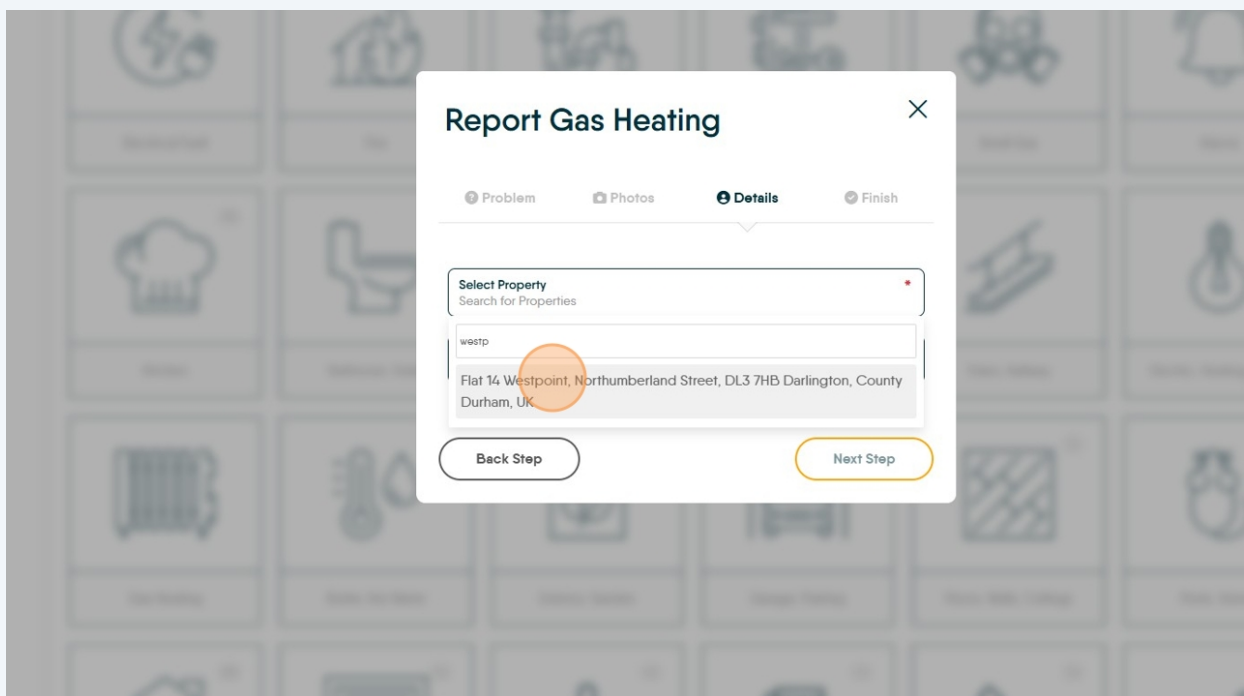
Once the images are added Click "Next Step"



- 11 Click "Search for Properties" and select the property from the drop down menu

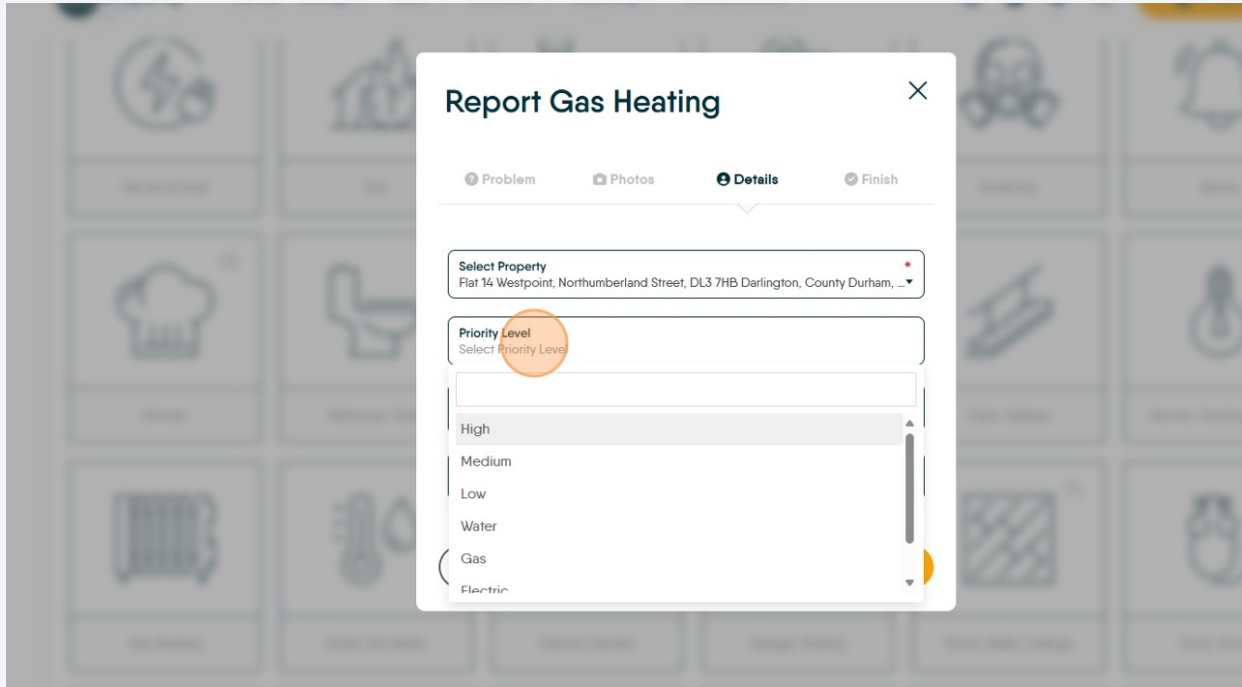


- 12 Click the property address from the list

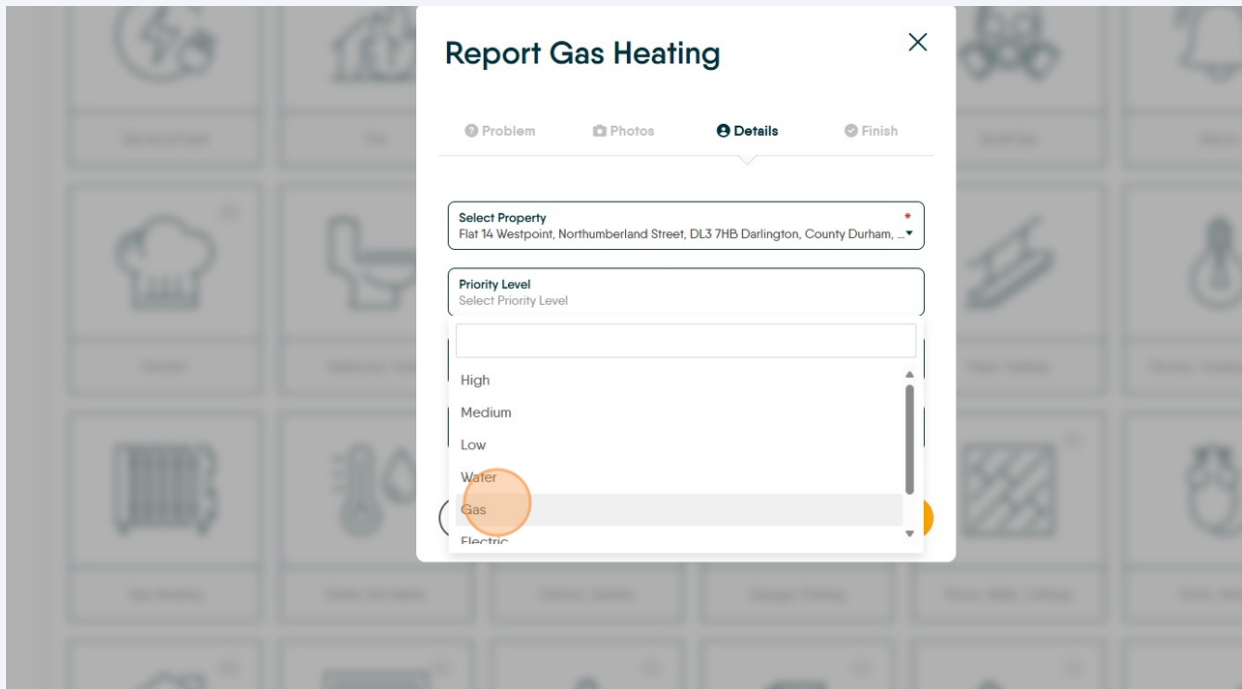


- 13 If required click "Select Priority Level" this allows you to set a priority to the job.

A priority can be anything that helps you manage the tasks, in our example we have High, Medium, Low, Water, Gas, Electric.
Click "Gas"



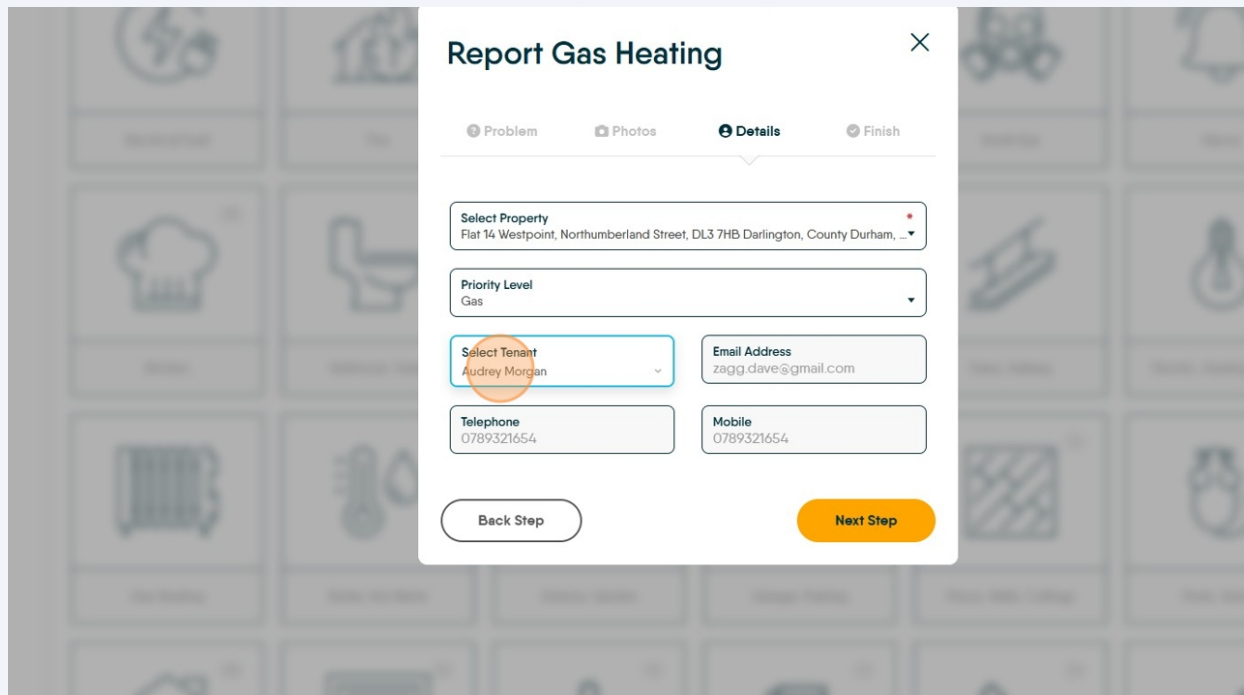
The screenshot shows a mobile app interface for reporting a gas heating issue. The form is titled "Report Gas Heating" and has a close button (X) in the top right corner. Below the title are four tabs: "Problem", "Photos", "Details", and "Finish". The "Details" tab is currently active. Under the "Details" tab, there is a "Select Property" section with a dropdown menu showing "Flat 14 Westpoint, Northumberland Street, DL3 7HB Darlington, County Durham, ...". Below this is a "Priority Level" section with a dropdown menu. The dropdown menu is open, showing a list of options: "High", "Medium", "Low", "Water", "Gas", and "Electric". The "High" option is currently selected and highlighted with a grey background. An orange circle is drawn around the "Priority Level" dropdown menu.



The screenshot shows the same mobile app interface as the previous one, but with the "Priority Level" dropdown menu open and the "Gas" option selected. The "Gas" option is highlighted with a grey background. An orange circle is drawn around the "Gas" option in the dropdown menu.

14

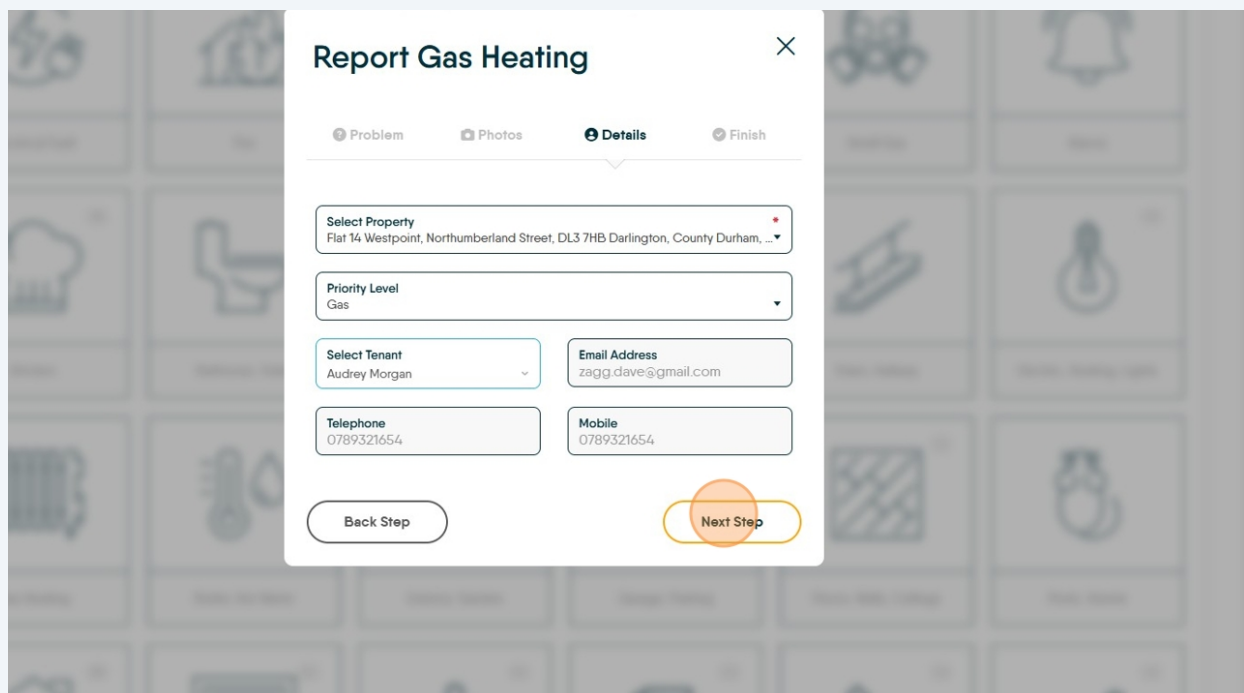
Then select the tenant who reported the task from the menu. All tenants in a tenancy will show in the list.



The screenshot shows a mobile app interface for reporting a gas heating issue. The form is titled "Report Gas Heating" and has a close button (X) in the top right corner. Below the title, there are four tabs: "Problem", "Photos", "Details", and "Finish". The "Details" tab is currently selected. The form contains several input fields: "Select Property" (with a dropdown menu showing "Flat 14 Westpoint, Northumberland Street, DL3 7HB Darlington, County Durham, ..."), "Priority Level" (with a dropdown menu showing "Gas"), "Select Tenant" (with a dropdown menu showing "Audrey Morgan" and a blue highlight around it), "Email Address" (with a text field showing "zagg.dave@gmail.com"), "Telephone" (with a text field showing "0789321654"), and "Mobile" (with a text field showing "0789321654"). At the bottom of the form, there are two buttons: "Back Step" and "Next Step".

15

Click "Next Step"



The screenshot shows the same "Report Gas Heating" form as in the previous image. The "Select Tenant" dropdown menu is still highlighted with a blue border. The "Next Step" button at the bottom right is now highlighted with an orange circle, indicating it is the next action to be taken.

16

Click the "Further Notes - eg parking restrictions etc.." field. to add any note, these notes will show in the Contractor email

Report Gas Heating [Close]

Problem Photos Details **Finish**

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

17

The last screen, complete the contact preferences and click "Finish Report" there will be an option to create another job select the appropriate option.

Report Gas Heating [Close]

Problem Photos Details **Finish**

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 ☒

On street

Back Step Finish Report

18 The job will then show in the jobs list.

im property My day Lettings Sales Accounts Reporting Communications My account

Search for reports that people have created for you

Search for ID, name, report, telephone, email or address

Create Job My Jobs Feedback Centre Invoices

filter by Priority Level

High Medium Low Water Gas Electric Court of Protection None

Created 476875

Flat 14 Westpoint, Northumberland Street, Darlington (Gas Heating)

ASSIGN Complete Job Cancel Job

Priority: Gas

Notes: all radiators are cold and the boiler is not working

Mrs Audrey Morgan
Created: 05/02/2025 16:20:36
Updated: 05/02/2025 16:20:36
Updated by: Training Dave

Created 476542

24 Westmoor Terrace, Darlington (Gas Heating)

Priority: None

Notes: no heat

Miss Ella Petch
Created: 05/02/2025 11:17:58

Colour shows Priority Level set.

To Assign the job to a Contractor



Tip! There are a couple of ways to allocate the task to a contractor, this is the most straightforward.

19 On the Task List, on the job you are assigning click "ASSIGN"









Search for reports that people have created for you

Search for ID, name, report, telephone, email or address

Create Job My Jobs Feedback Centre Invoices

Filter by Priority Level

High Medium Low Water Gas Electric Court of Protection None

	Created 476875 Flat 14 Westpoint, Northumberland Street, Darlington (Gas Heating)  ASSIGN  Complete Job  Cancel Job	Priority: Gas Notes: all radiators are cold and the boiler is not working	Mrs Audrey Morgar Created: 05/02/2016 20:36 Updated: 05/02/2016 20:36 Updated by: Trainin
	Created 476542 24 Westgarth Terrace, Darlington (Gas Heating)  ASSIGN  Complete Job  Cancel Job	Priority: None Notes: no heat	Miss Ella Petch Created: 05/02/2016 22:20 Updated: 05/02/2016 22:20 Updated by: Ella Pe

20

There are 3 options to assign a task to a contractor, Offer Task and Email, Assign Task and Email, Assign Task and Dont Email.

Offer Task.. allows a job to be offered to multiple contractors and be allocated once the Contractors have responded. It is the least used option.

Click "Assign Task & Email Contractor, will email the contractor with the information on the job. This and the 'Dont email...' option will be the most used.

If we click 'Assign task and email contractors'.

The screenshot shows a web application interface with a modal window titled "Assign To Contractors". The modal has a close button (X) in the top right corner. It contains three selectable options at the top, each with a description: "Offer Task & Email Contractor" (Offer task to contractors and send notification email), "Assign Task & Email Contractor" (Assign to contractors and send notification email), and "Assign Task & Don't Email Contractor" (Assign to contractors and don't send notification email). Below these are two dropdown menus: "Offer Duration" (set to 05/02/2025) and "Quote Required" (set to No). There is a "Filter Contractor by" section with a toggle for "All Branches". Below that is a "Select Contractors" section with a green plus icon and a red asterisk, and a "Note..." text area. At the bottom, there are two input fields: "Property Occupied" and "Job Completion Date". At the very bottom are two buttons: "Cancel Assign" and "Finish Assign". An orange circle highlights the "Assign Task & Email Contractor" option.

- 21 Click this search field search for the contractor.

The screenshot shows the 'Assign To Contractors' modal. At the top, there are three tabs: 'Offer Task & Email Contractor', 'Assign Task & Email Contractor' (which is selected and highlighted with a blue border), and 'Assign Task & Don't Email Contractor'. Below the tabs, there is a 'Filter Contractor by' section with a dropdown menu set to 'All Branches'. Underneath is a 'Select Contractors' search field, which is highlighted with an orange circle. Below the search field is a 'Note.....' text area. Further down, there are two input fields: 'Property Occupied' (with 'Yes' selected) and 'Job Completion Date' (with '05/02/2025' entered). At the bottom, there is an 'Authorised Budget' field and two buttons: 'Cancel Assign' and 'Finish Assign'.

- 22 Click the name of the Contractor you are using. Any Contractor with 'Assoc.' next to their name is a preferred contractor for that property. You may also see 'Warranty', this indicates the Property has a warranty on it.

This screenshot shows the 'Assign To Contractors' modal with the 'Select Contractors' search field expanded. The search field is highlighted with an orange circle. Below the search field, a list of contractors is displayed. Each contractor's name is preceded by a blue box containing the text 'Assoc.'. The contractors listed are: Gary Cox (Handyman), James Cafeconstruction, and Morgan Contracting. Below the list, there are several lines of text: 'Auf Wiedersehen, Pet Property Services', 'Best Plumbing & Heating', and 'Blankinn'. The 'Cancel Assign' and 'Finish Assign' buttons are visible at the bottom of the modal.

23

Click the "Note....." field and add the detailed notes for the Contractor, only the Contractor sees these notes and as such this field should be used for the full detailed instructions to your contractor.

Assign To Contractors [X]

Offer Task & Email Contractor

Offer task to contractors and send notification email

Assign Task & Email Contractor

Assign to contractors and send notification email

Assign Task & Don't Email Contractor

Assign to contractors and don't send notification email

Filter Contractor by All Branches

Select Contractors +

Morgan Contracting X

Note.....

Property Occupied Yes

Job Completion Date 05/02/2025

Cancel Assign Finish Assign

Assign To Contractors [X]

Offer Task & Email Contractor

Offer task to contractors and send notification email

Assign Task & Email Contractor

Assign to contractors and send notification email

Assign Task & Don't Email Contractor

Assign to contractors and don't send notification email

Filter Contractor by All Branches

Select Contractors +

Morgan Contracting X

add the detailed instructions to the landlord in this field. This is visible to the contractor and your self

Property Occupied Yes

Job Completion Date 05/02/2025

Cancel Assign Finish Assign

24

Click the "Select the Date" field to add a job completion date. This date drives the Activity List notification to show overdue maintenance jobs.

The screenshot shows the 'Assign To Contractors' modal form. At the top, there are three radio button options: 'Assign task to contractors and send notification email' (selected), 'Assign to contractors and send notification email', and 'Assign to contractors and don't send notification email'. Below these is a 'Filter Contractor by' section with a toggle for 'All Branches'. The 'Select Contractors' section shows 'Morgan Contracting' as the selected contractor. A text field for instructions is present. The 'Property Occupied' section has a 'Yes' selection. The 'Job Completion Date' field is highlighted with an orange circle and contains the date '05/02/2025'. The 'Authorised Budget' field contains '£ 0'. At the bottom are 'Cancel Assign' and 'Finish Assign' buttons.

25

To add an authorised budget click here

This screenshot is identical to the previous one, showing the 'Assign To Contractors' modal form. In this instance, the 'Authorised Budget' field, which contains '£ 0', is highlighted with an orange circle. The 'Job Completion Date' field now shows '08/02/2025'. All other elements, including the contractor selection and buttons, remain the same.

26

Click "Finish Assign" and your contractor will receive an email with the details for the job.

Assign To Contractors

View task to contractors and send notification email | Assign to contractors and send notification email | Assign to contractors and don't send notification email

Filter Contractor by: All Branches

Select Contractors: Morgan Contracting

add the detailed instructions to the landlord in this field. This is visible to the contractor and your self

Property Occupied: Yes

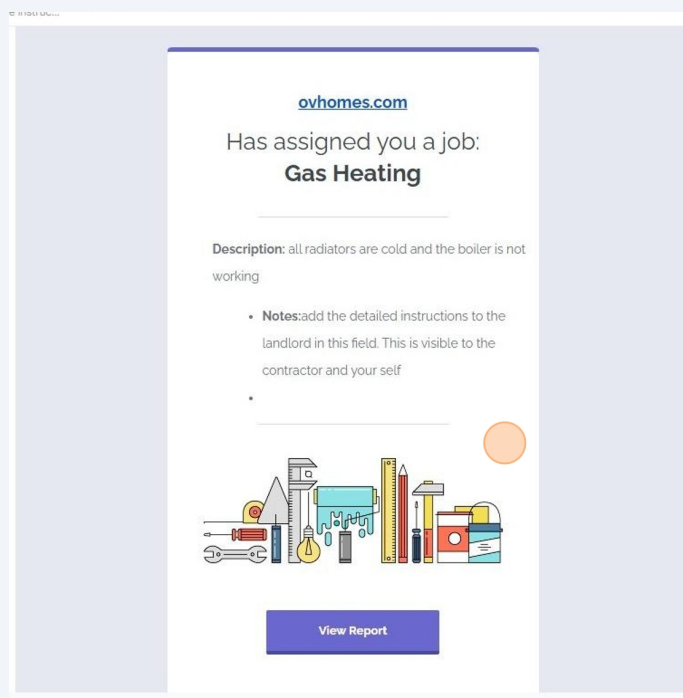
Job Completion Date: 08/02/2025

Authorised Budget: £100

Cancel Assign | **Finish Assign**

27

The Contractor email will look like this. The email includes your branding and all of the detail that is added during the creation process, including pictures.



28

Once the job has been assigned, return to the task list and the updated information will show on the screen.

Search for reports that people have created for you

Search for ID, name, report, telephone, email or address

Create Job **My Jobs** Feedback Centre Invoices

ity Level

Medium Low Water Gas Electric Court of Protection None

Live 476875

Flat 14 Westpoint, Northumberland Street, Darlington (Gas Heating)

✓ Complete Job ✗ Cancel Job

Priority: Gas

Notes: all radiators are cold and the boiler is not working

Completion Date → 08/02/2025

Contractor: Morgan Contracting
Completion Date: 08/02/2025

Mrs Audrey Morgan
Created: 05/02/2025 16:20:36
Updated: 05/02/2025 17:15:13
Updated by: Training Dave

Created 476542

24 Westgarth Terrace, Darlington (Gas Heating)

⚙️ ASSIGN ✓ Complete Job ✗ Cancel Job

Priority: None

Notes: no heat

Miss Ella Petch
Created: 05/02/2025 11:17:58
Updated: 05/02/2025 11:22:20
Updated by: Ella Petch



Tip! If the task reaches the Completion Date (if set) the Contractor details and date will show Orange, once past the date they will show Red.