

# 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 shows the iamproperty CRM interface. At the top, there is a navigation bar with links for 'My day', 'Lettings', 'Sales', 'Accounts', 'Reporting', 'Communications', and a search bar. Below the navigation bar, a large banner says 'Welcome back, Training'. Underneath the banner, there are two main sections: 'Today's events' and 'My tasks'. The 'Today's events' section shows a single event at 12:00 with the name 'Test test'. The 'My tasks' section shows three tasks: one for 'Call Landlord' (High priority, due 15/Nov/2024), one for 'test' (High priority, due 27/Nov/2024), and one for 'Call Landlord' (Medium priority, due 12/Dec/2024). At the bottom of the interface, there are buttons for '+ Add New Record', 'View Property Management' (which is circled in orange), and 'Visit Help Centre'.

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"

Dashboard metrics:

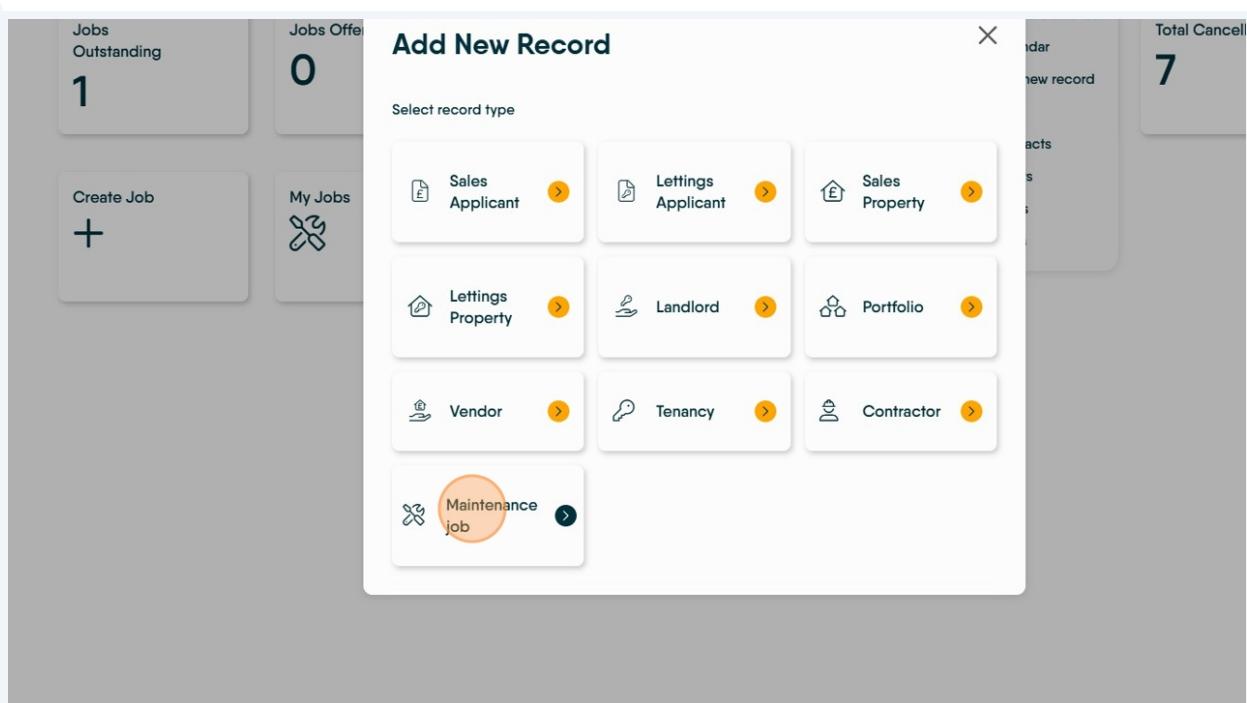
- Jobs Offered: 0
- Jobs Assigned: 0
- Jobs Completed: 173
- Total Jobs: 174
- Total Cancelled: 7

Navigation links:

- My day
- Lettings
- Sales
- Accounts
- Reporting
- Communications
- My account

Context menu options (visible over the 'Total Jobs' box):

- Active branches
- Calendar
- + Add new record
- Calls
- Contacts
- Events
- Notes
- Tasks

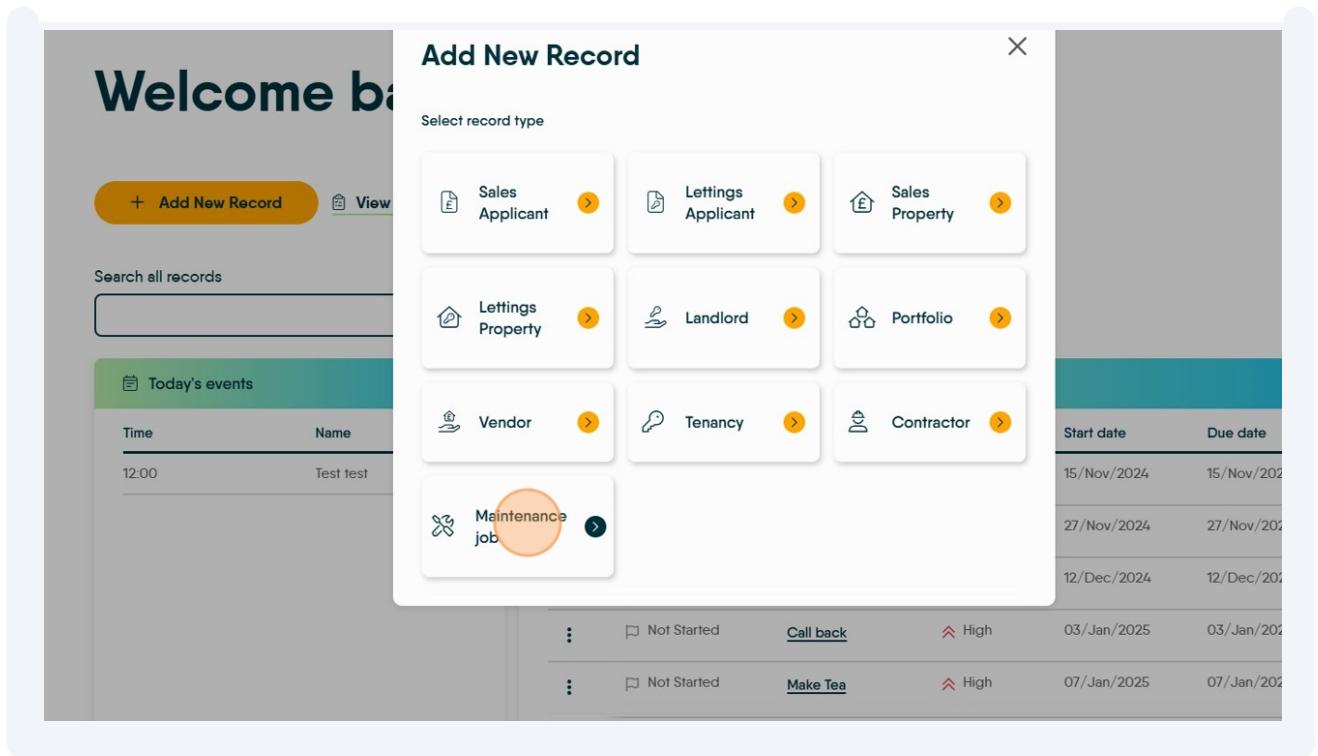


## 5 The alternate way to add a maintenance job.

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

Search all records  Search

Time	Name	Status	Name	Priority	Start date	Due date
12:00	Test test	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



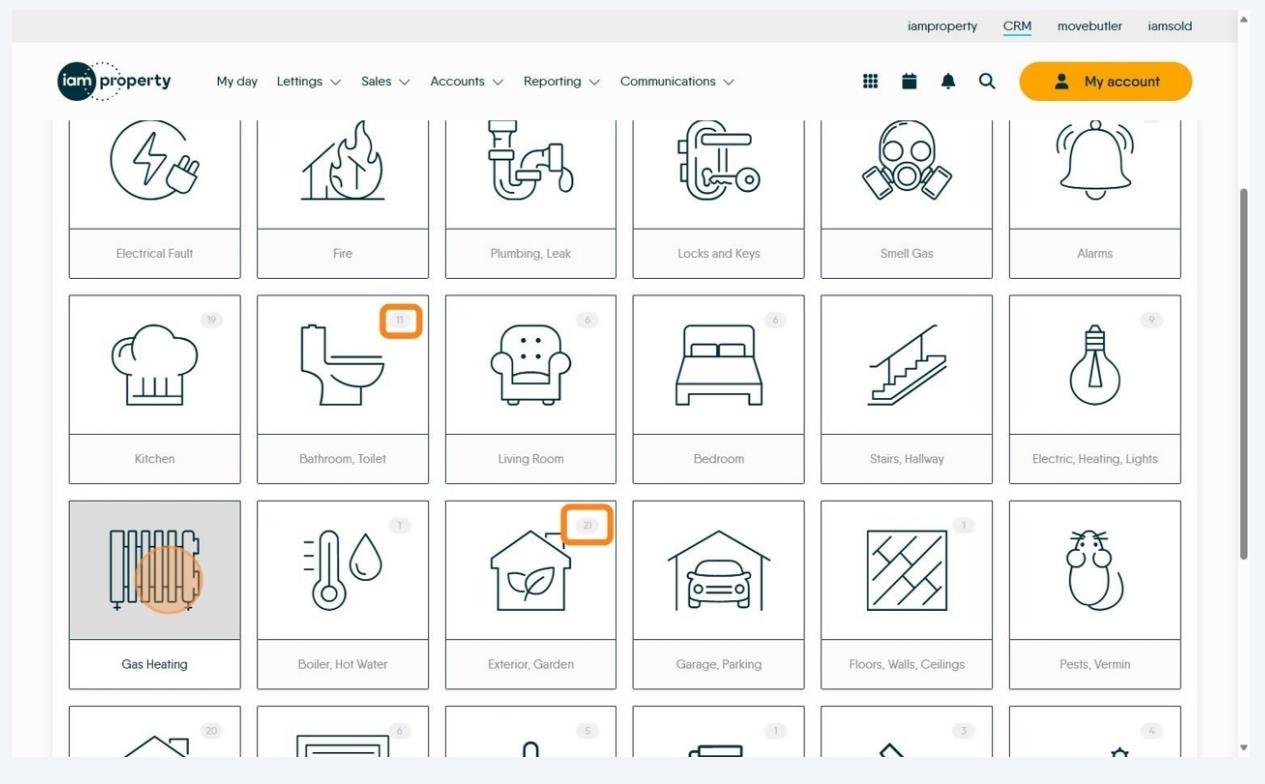
6 or from within the Property Management Dashboard.

All these options lead to the same screen.

## Creating the Job

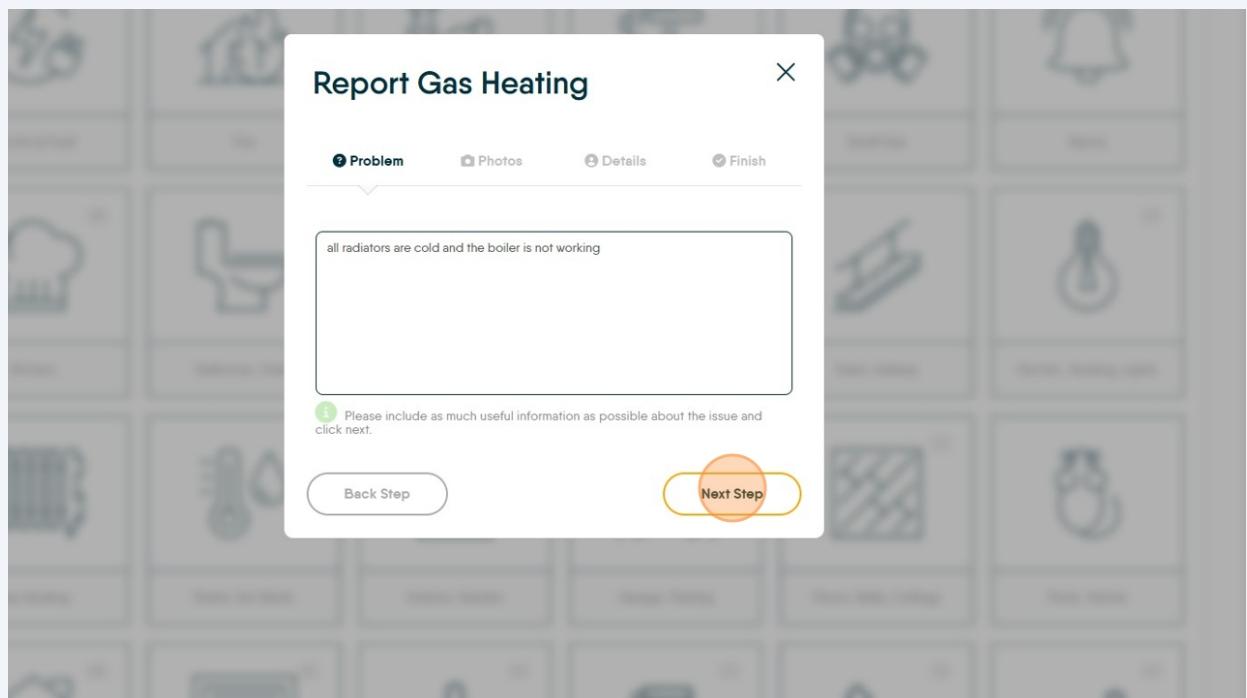
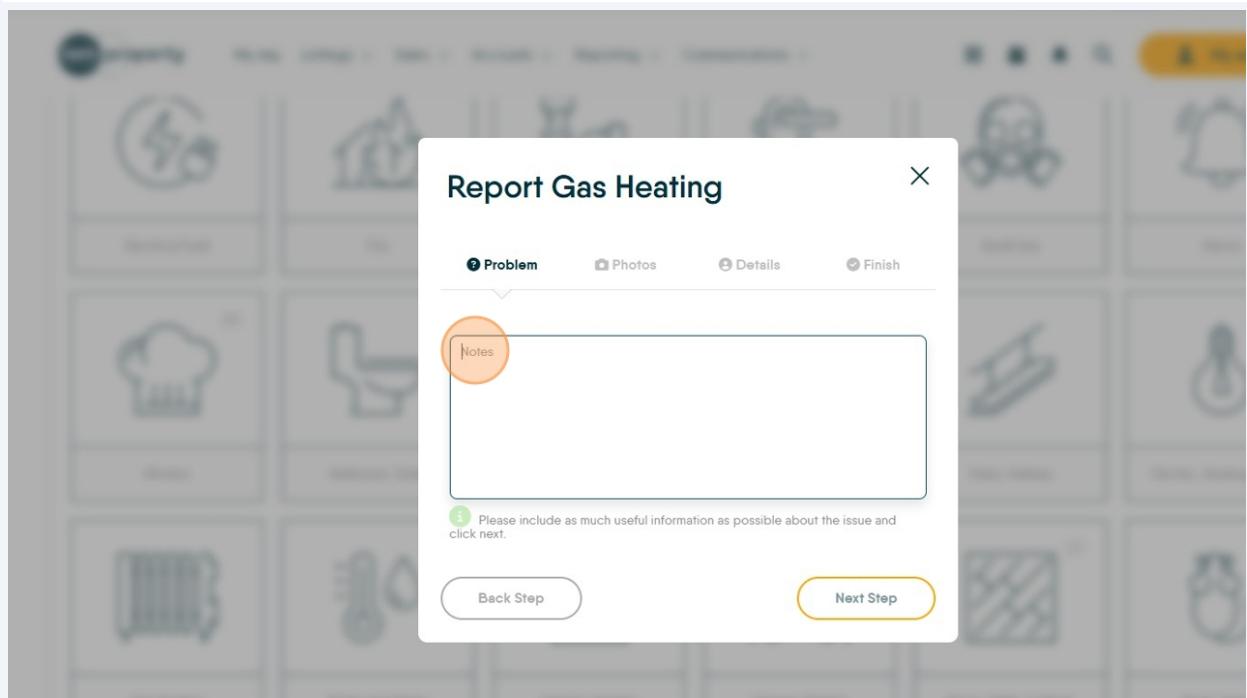
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From the first screen shown select the task type that fits your issue the best. Some tiles have sub categories, these have a number in the top right corner (as highlighted).



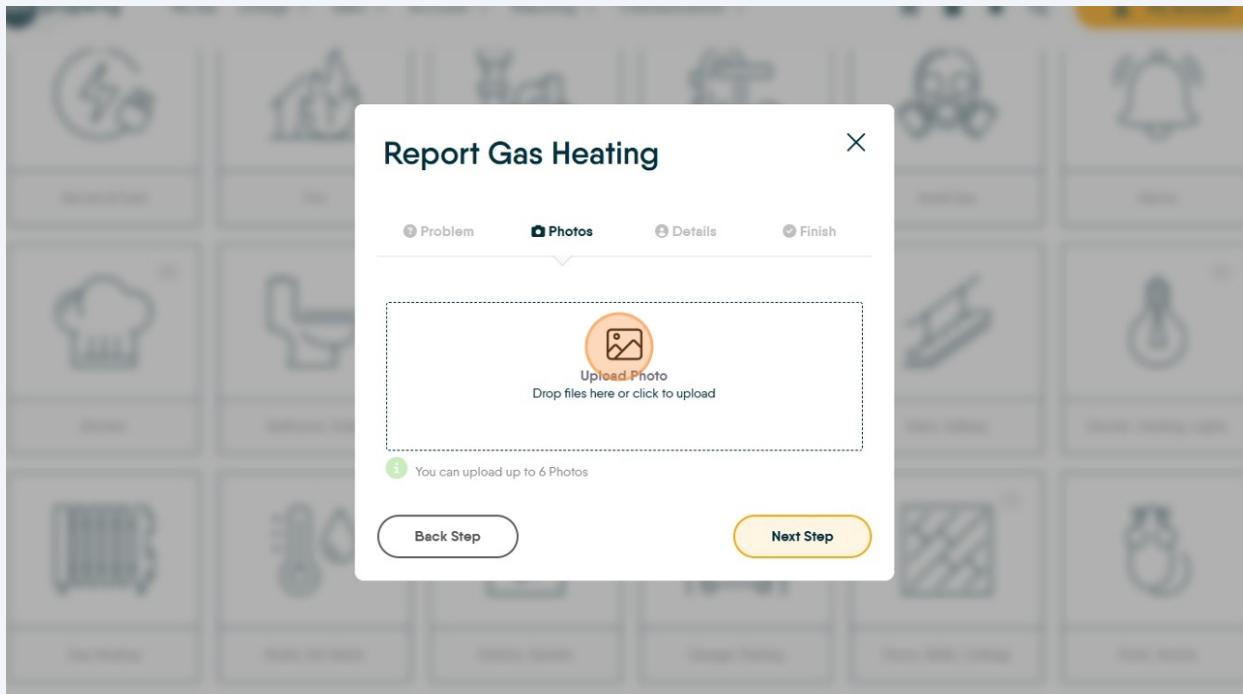
8

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".



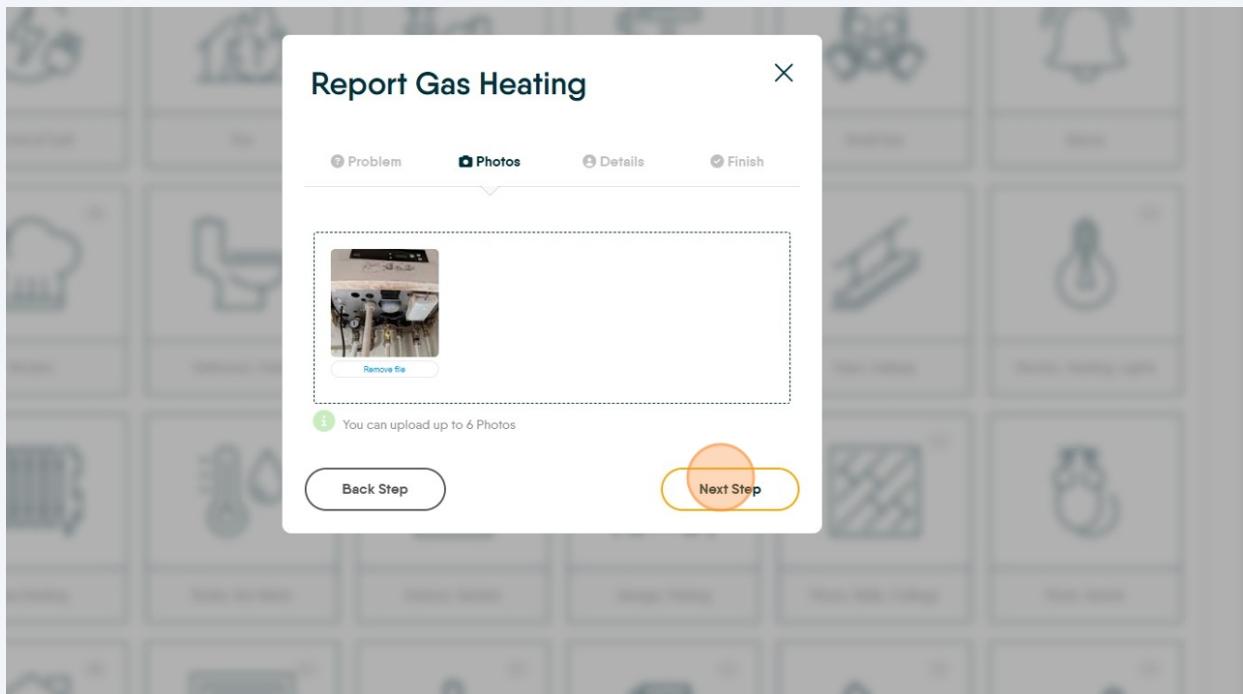
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Then click here to add any images (upto 6) to support the contractor in diagnosing and repair of the issue.

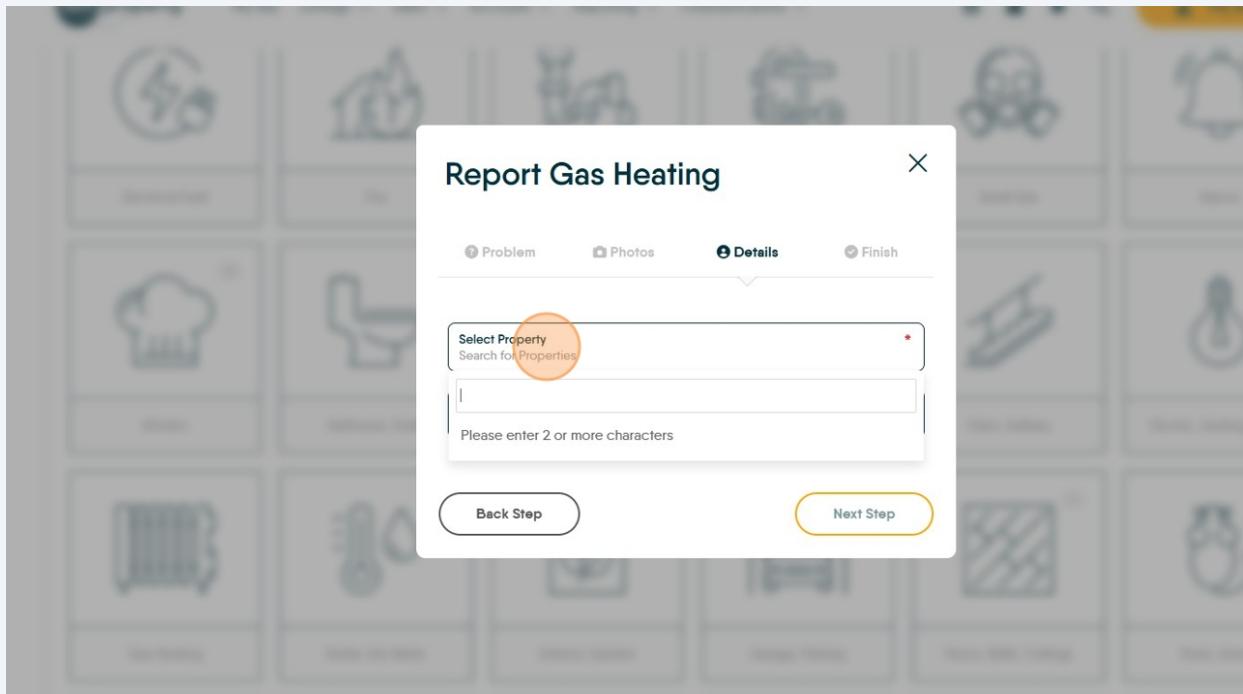


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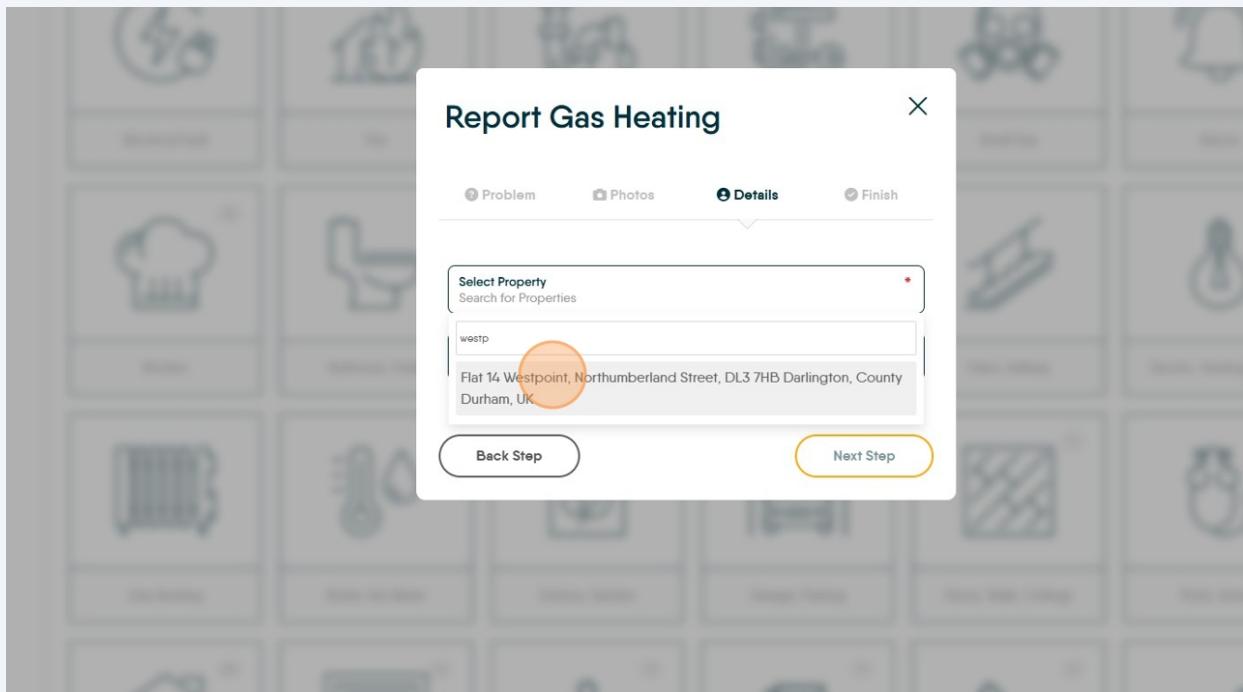
Once the images are added Click "Next Step"



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



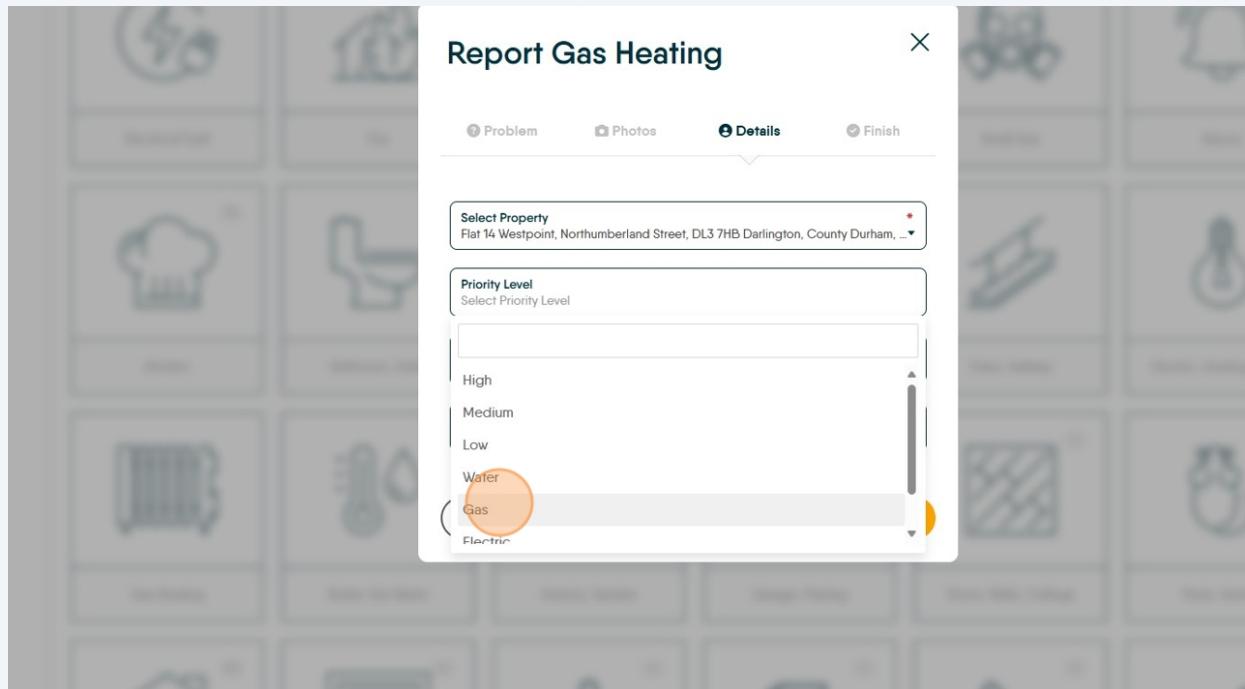
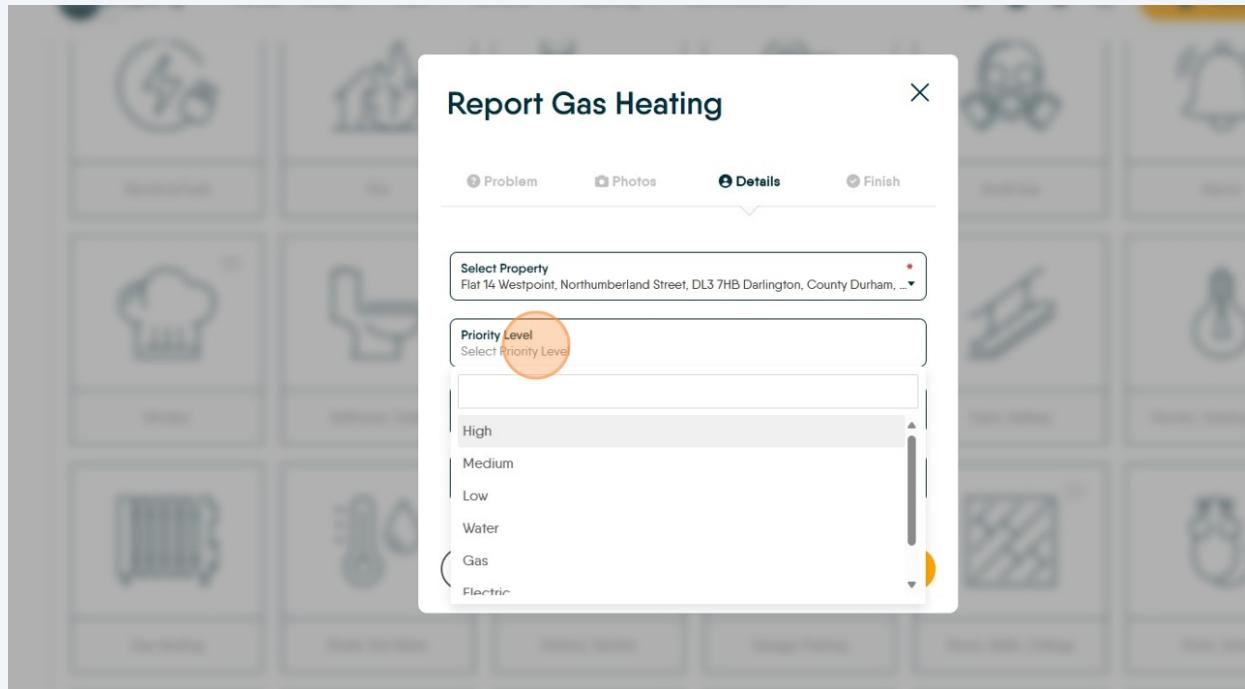
12 Click the property address from the list



13

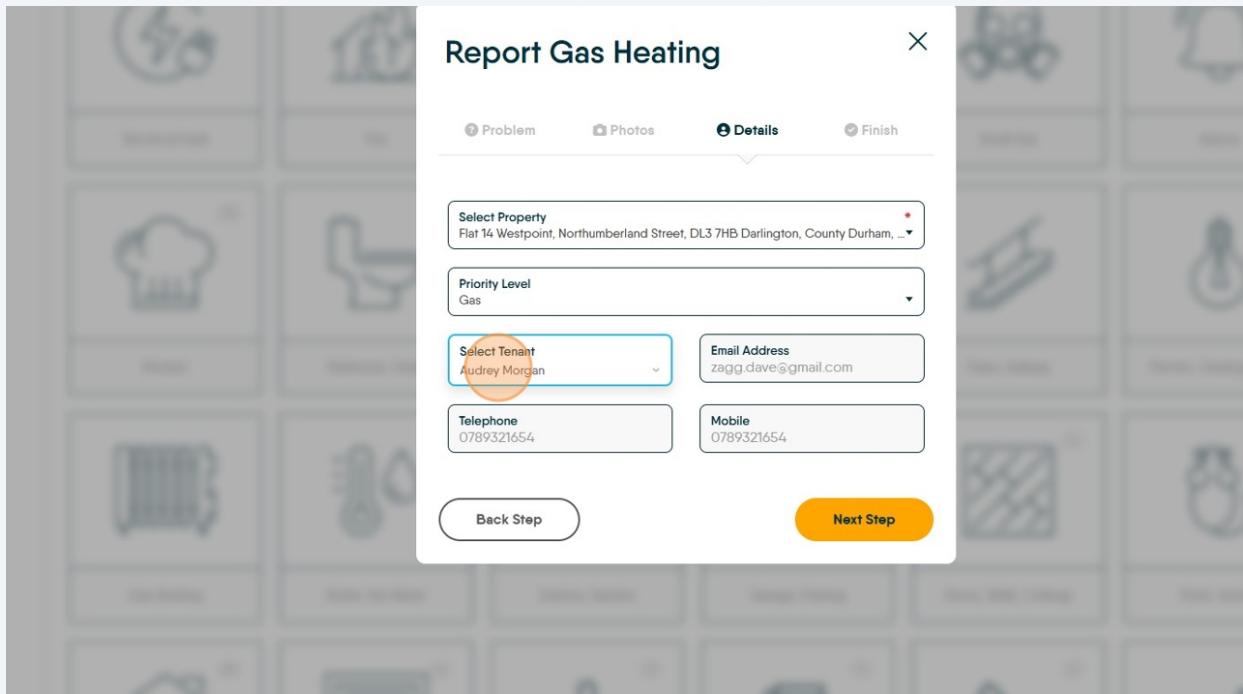
If required click "Select Priority Level" this allows you to set a priority to the job.

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



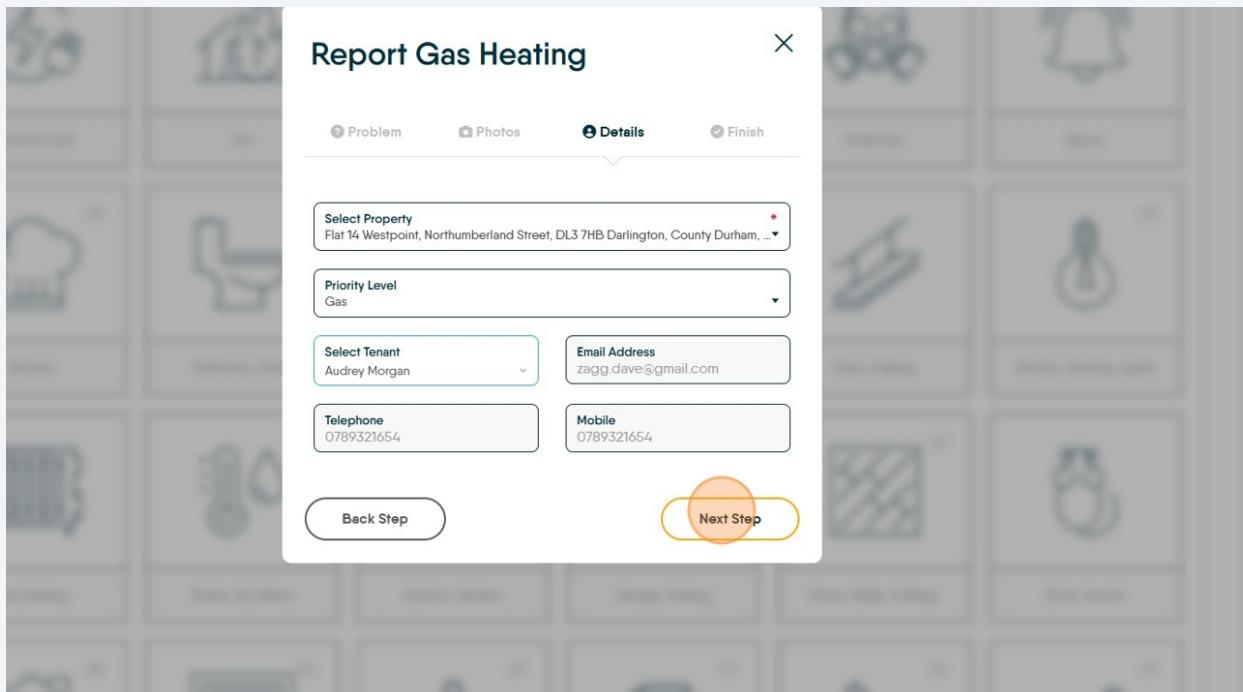
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Then select the tenant who reported the task from the menu. All tenants in a tenancy will show in the list.



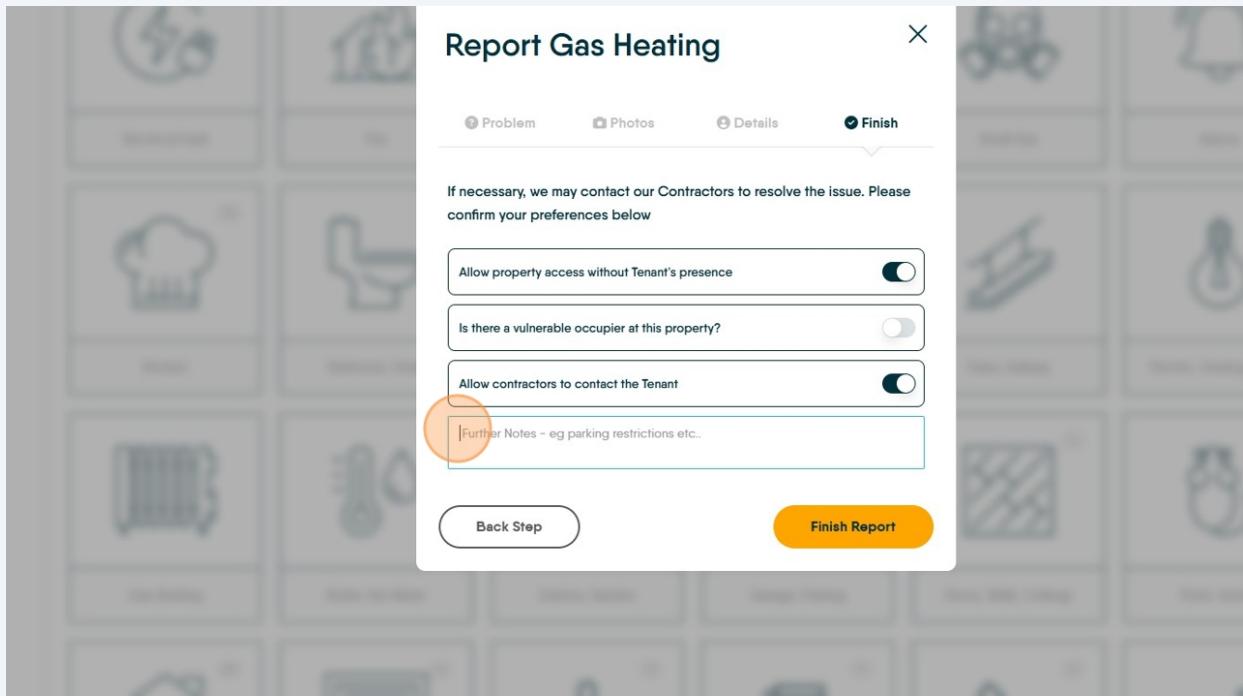
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Click "Next Step"



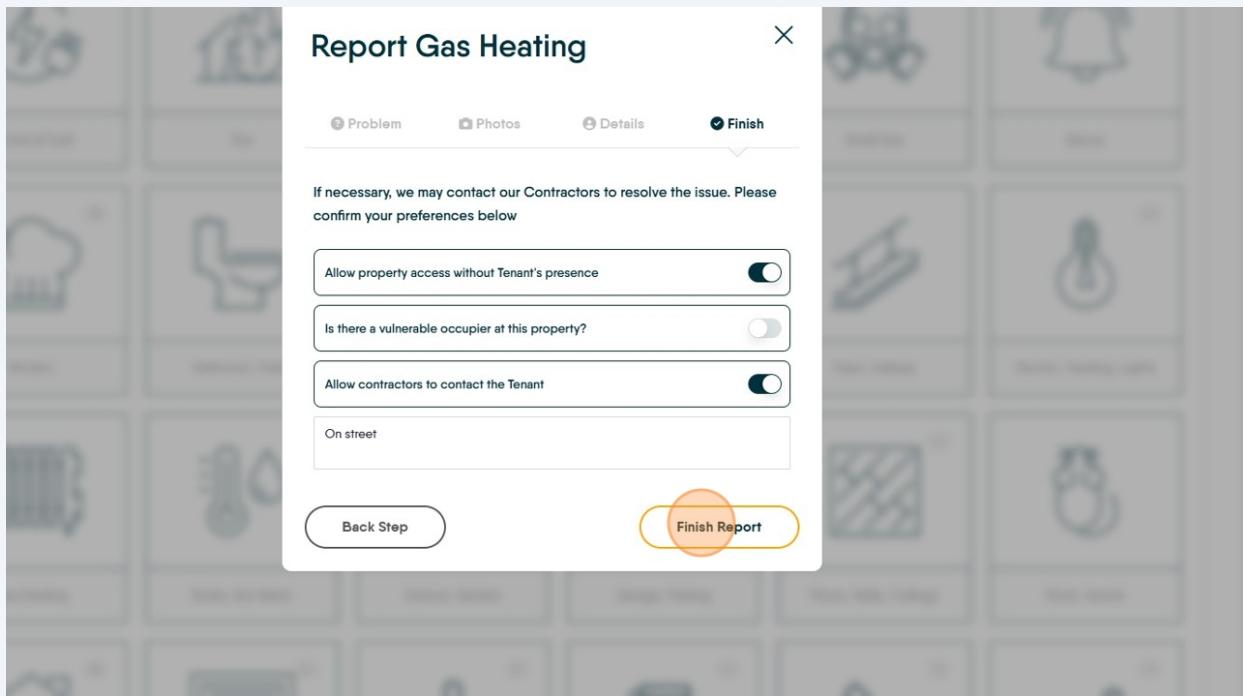
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Click the "Further Notes - eg parking restrictions etc.." field. to add any note, these notes will show in the Contractor email



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.



18 The job will then show in the jobs list.

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

Colour shows Priority Level set.

Job Details	Priority	Notes	Owner
Flat 14 Westpoint, Northumberland Street, Darlington (Gas Heating)	Gas	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
Flat 15 Westpoint, Northumberland Street, Darlington (Gas Heating)	None	no heat	Miss Ella Petch Created: 05/02/2025 11:17:58

## 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

**Job 1: Flat 14 Westpoint, Northumberland Street, Darlington (Gas Heating)**

- Created: 476875
- Priority: Gas
- Notes: all radiators are cold and the boiler is not working
- Mrs Audrey Morgan  
Created: 05/02/2016:20:36  
Updated: 05/02/2016:20:36  
Updated by: Trainin

**Job 2: 24 Westgarth Terrace, Darlington (Gas Heating)**

- Created: 476542
- Priority: None
- Notes: no heat
- Miss Ella Pritch  
Created: 05/02/2016:22:20  
Updated: 05/02/2016:22:20  
Updated by: Ella Pe

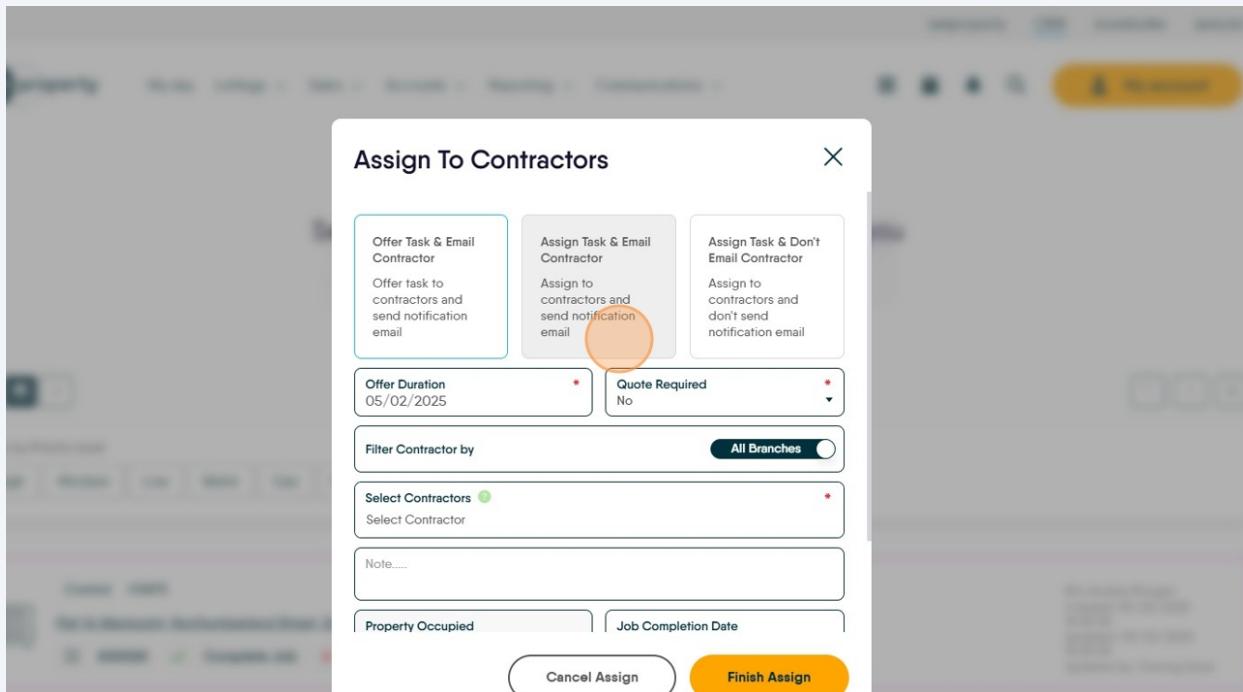
20

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

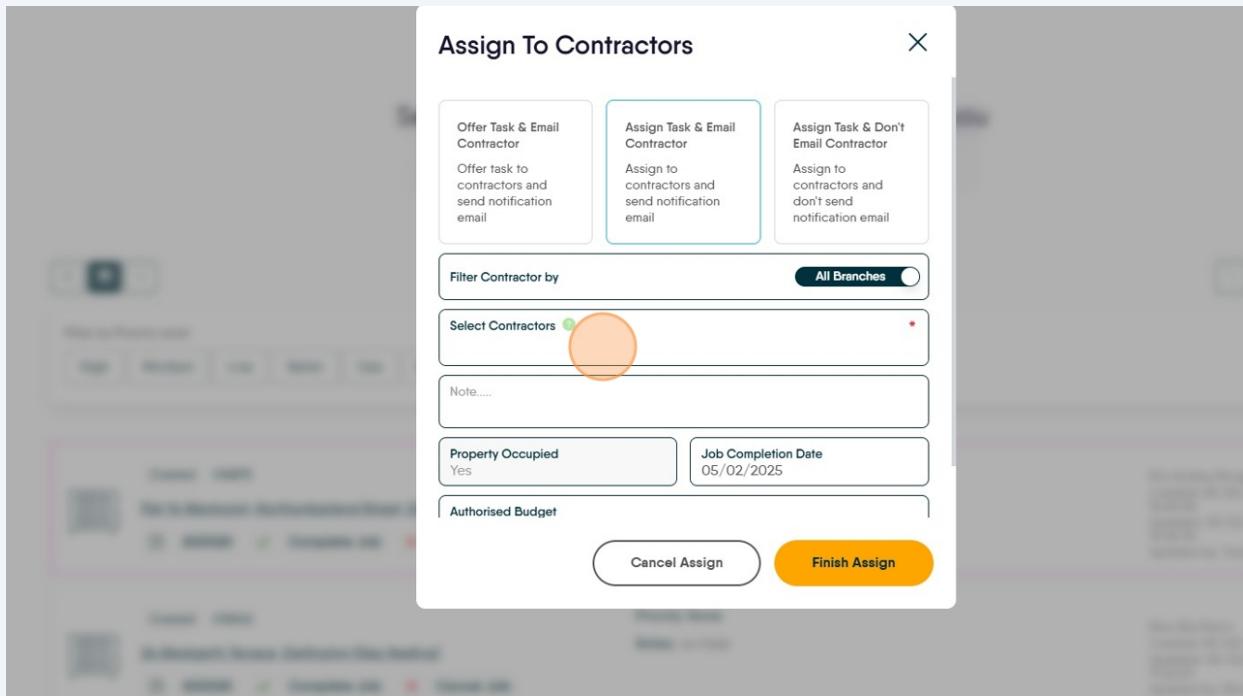
Offer Task.. allows a job to be offered to multiple contractors and be allocated once the Contractors have responded. It is the least used option.

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.

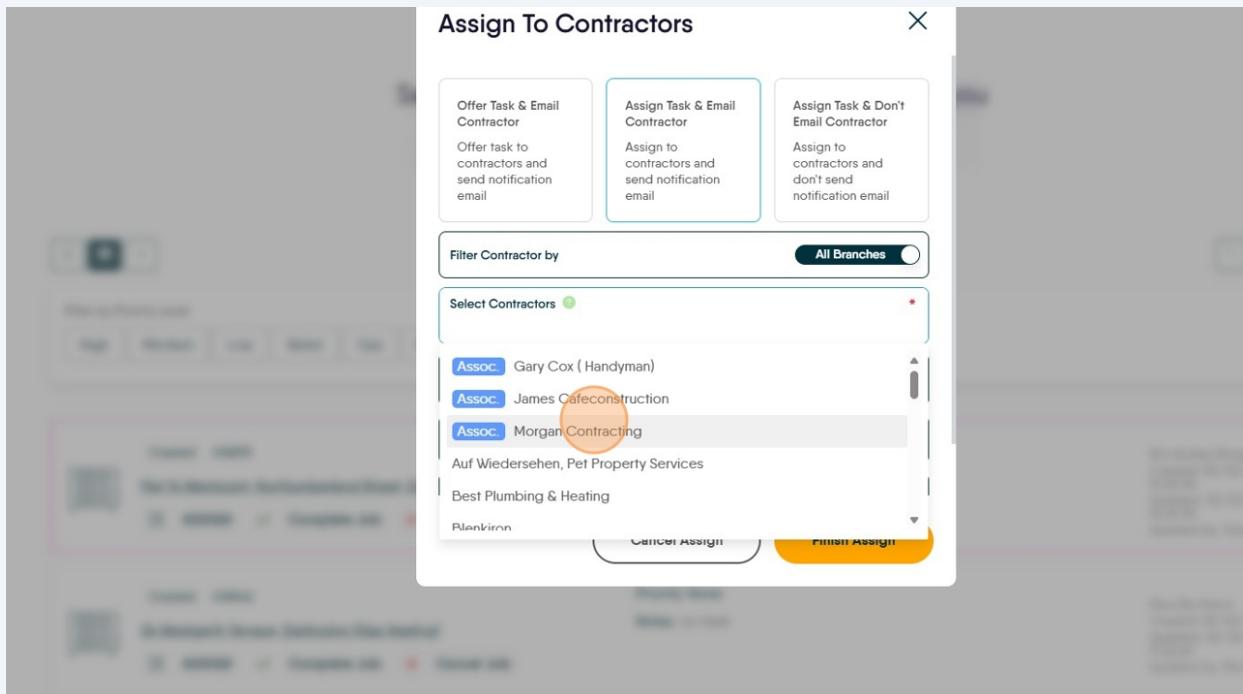
If we click 'Assign task and email contractors".



21 Click this search field search for the contractor.

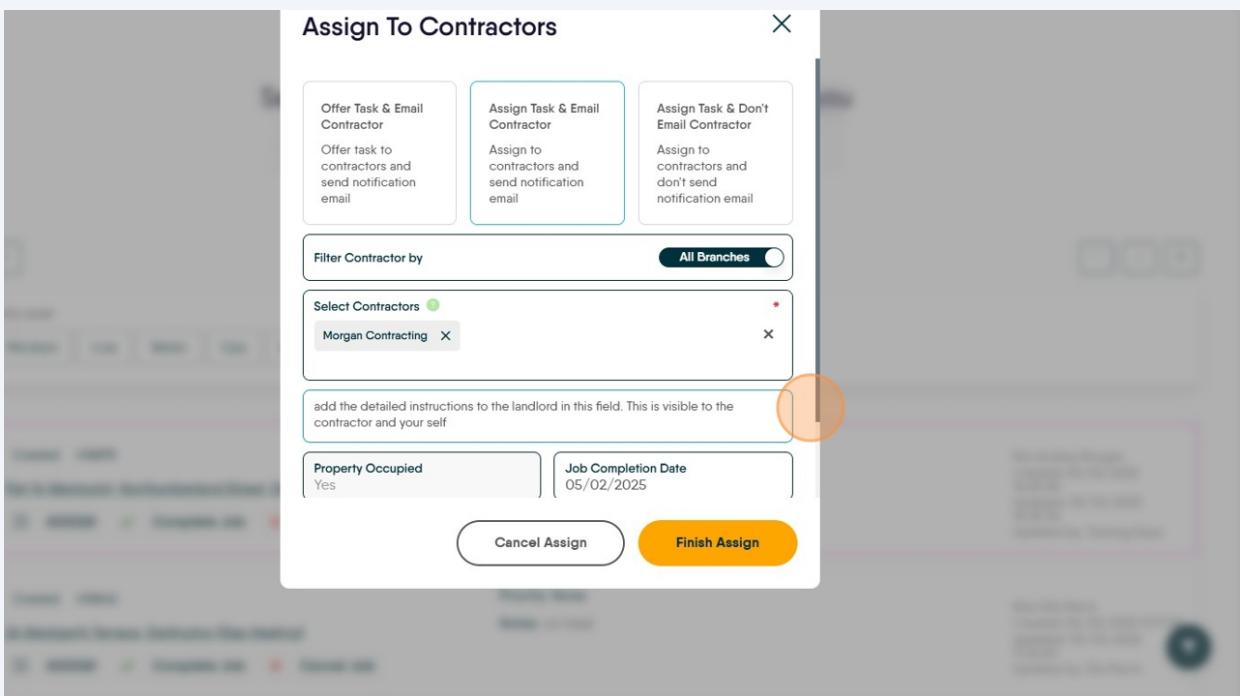
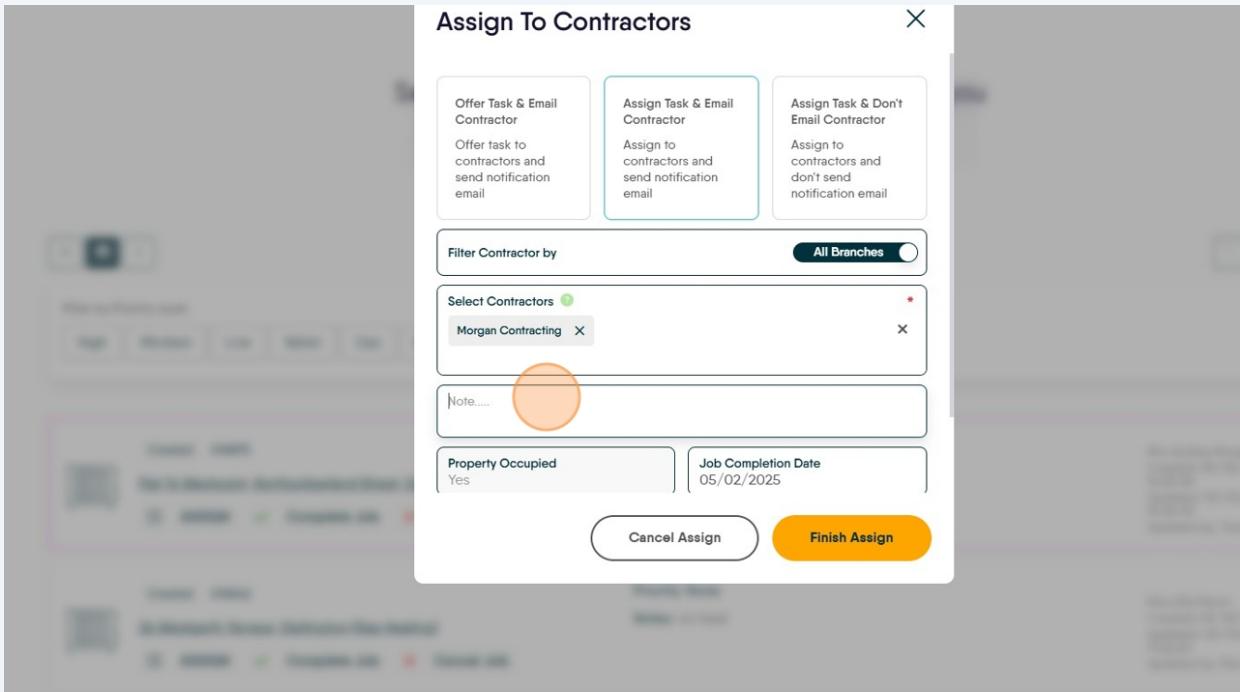


22 Click the name of the Contractor you are using. Any Contractor with 'Assoc.' next to their name is a preferred contractor for that property. You may also see 'Warranty', this indicates the Property has a warranty on it.



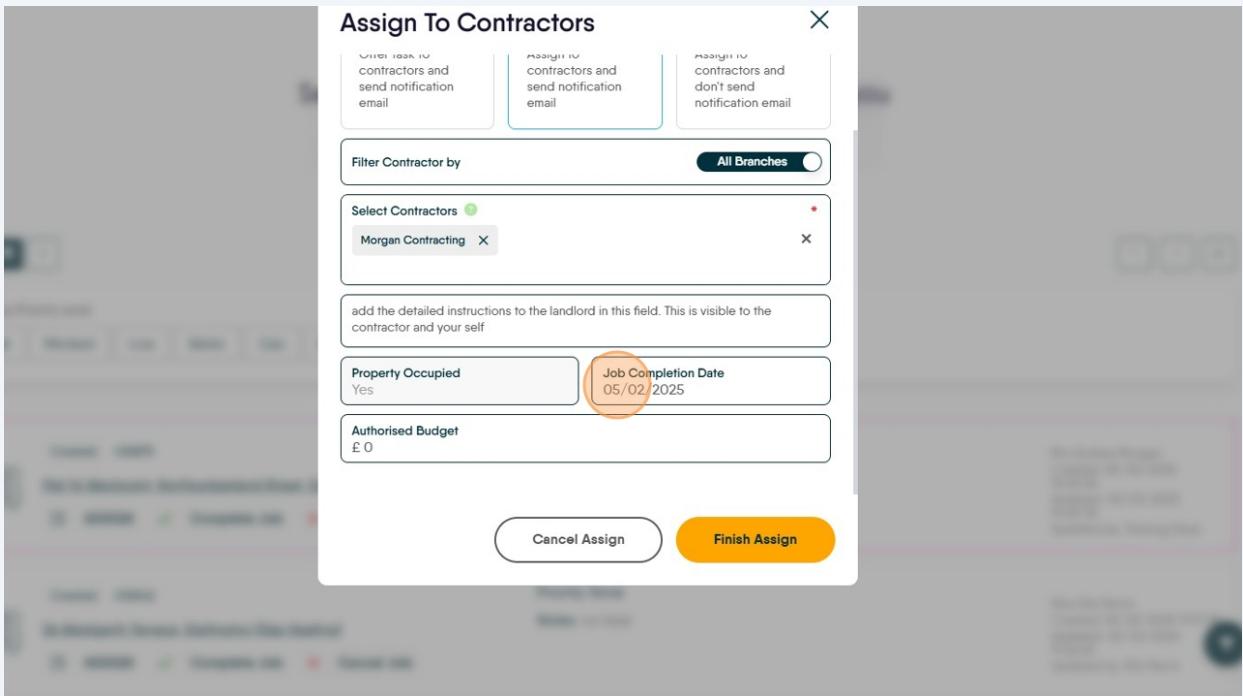
23

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.



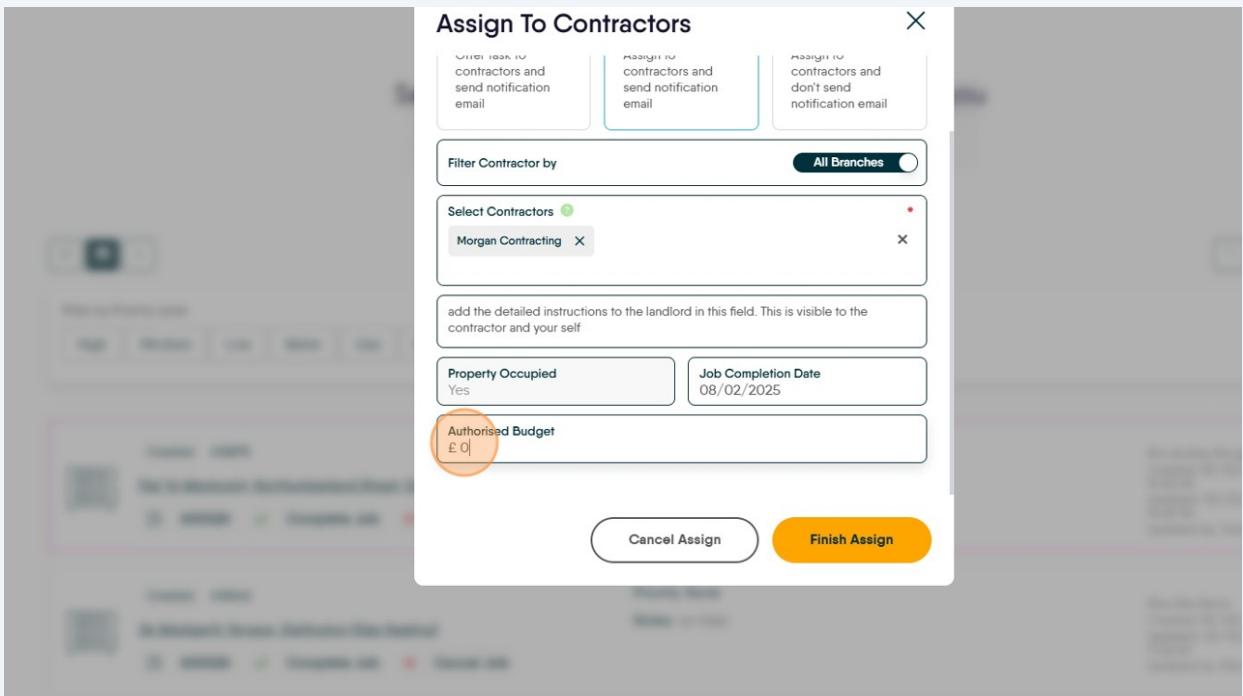
24

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



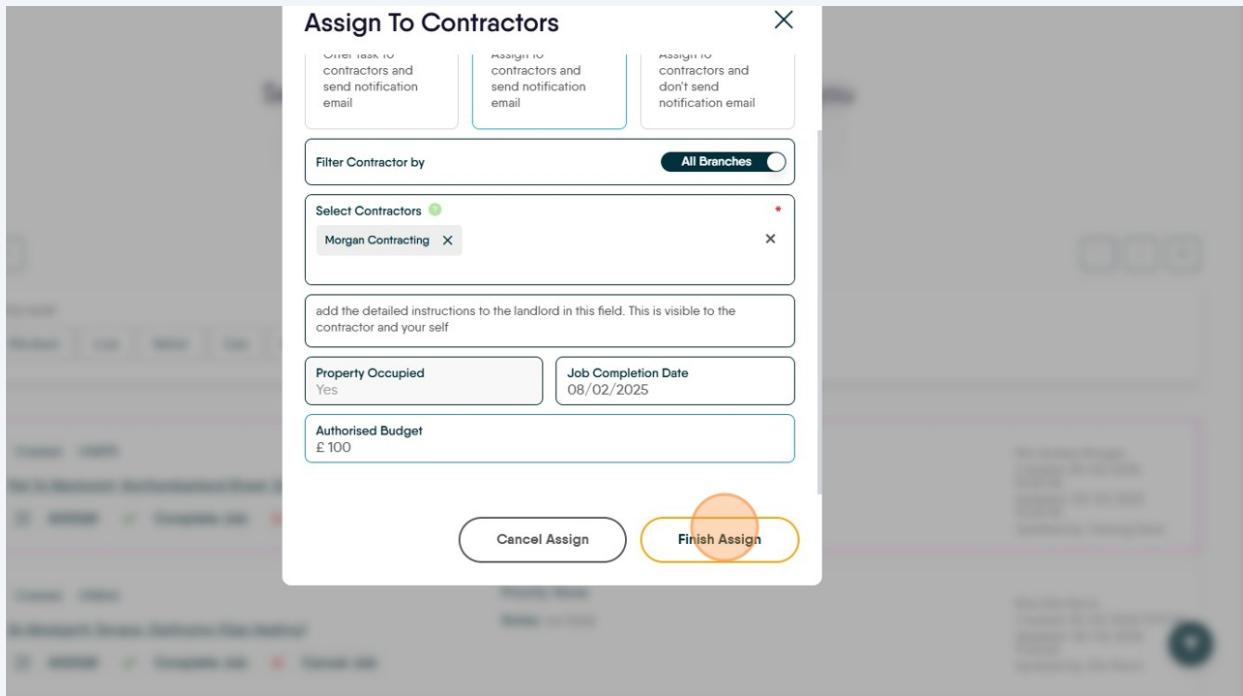
25

To add an authorised budget click here



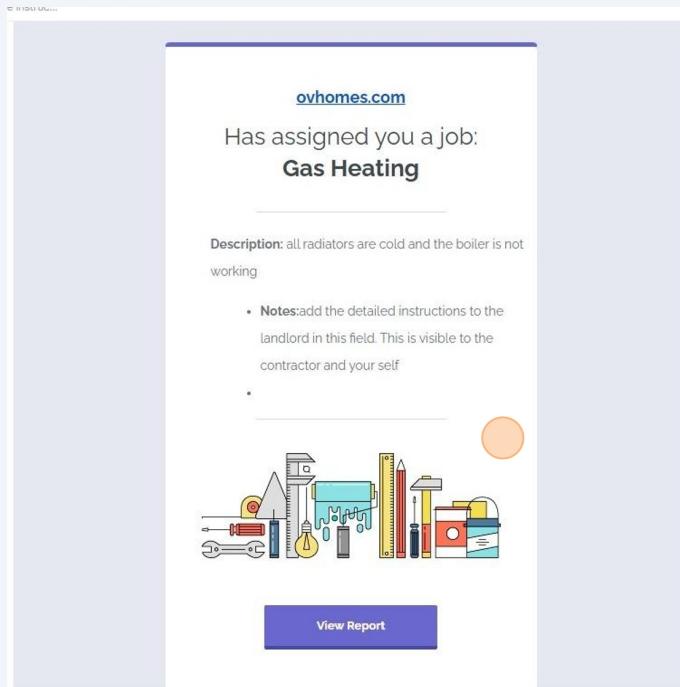
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Click "Finish Assign" and your contractor will receive an email with the details for the job.



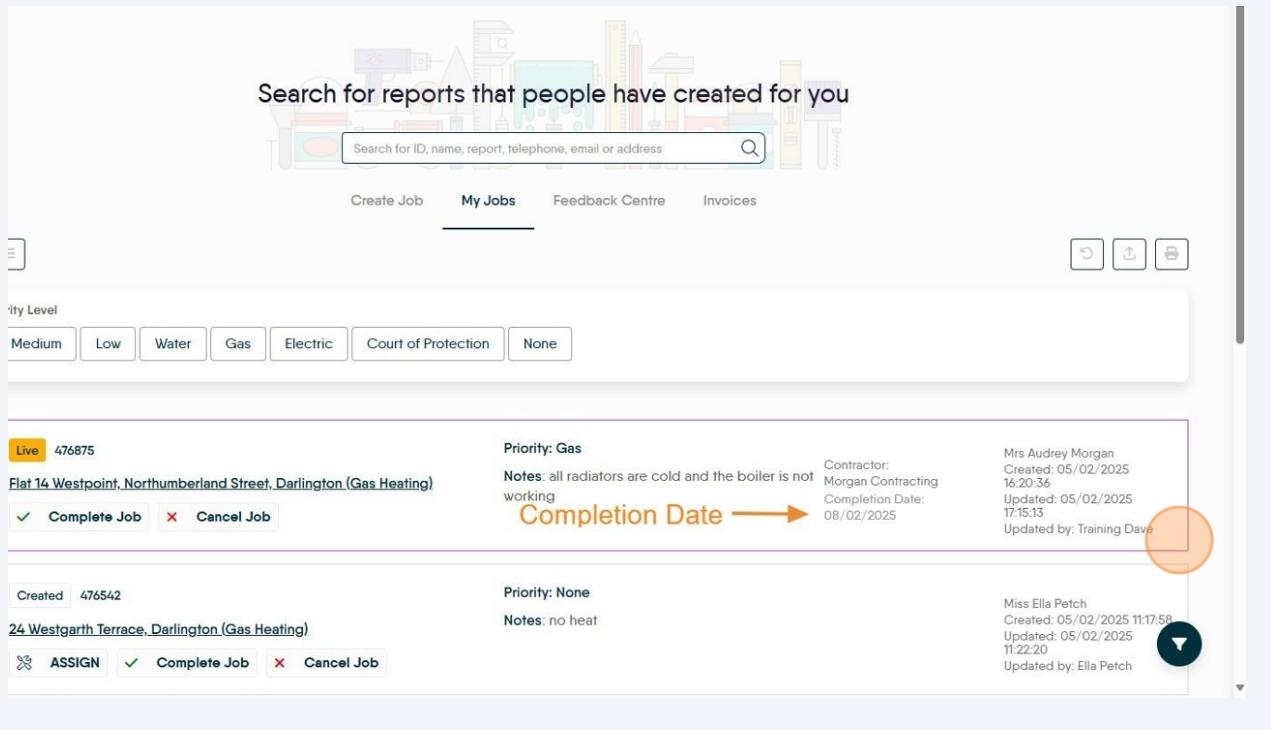
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The Contractor email will look like this. The email includes your branding and all of the detail that is added during the creation process, including pictures.



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

Priority Level

Medium Low Water Gas Electric Court of Protection None

Live 476875

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

Priority: Gas

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

Completion Date →

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)

Priority: None

Notes: no heat

ASSIGN Complete Job Cancel Job

Completion Date →

Contractor: 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.