

Assigning a Property Manager (Negotiator) to a Property Record



This guide provides a straightforward process for assigning a property manager to a property record, ensuring efficient management of property-related tasks. This allows more accurate use of the CRM Property Management messaging filters and notifications.

This allows Property Managers to filter jobs in the Property Management 'My Jobs' list to only show properties allocated to them as a user (Negotiator).

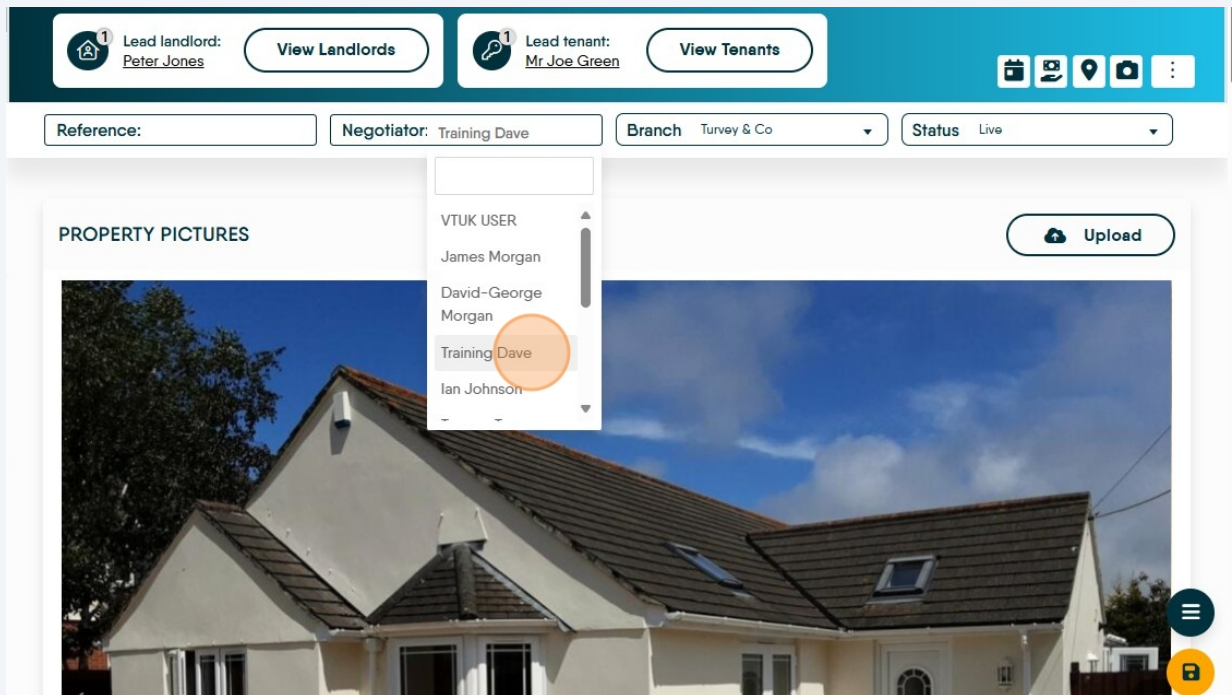


This process requires the Property Managers to have access to CRM, as a minimum access to the Property Management module. If you have any questions please speak to CRM Support. crm.support@iamproperty.com 01865 860870

- 1 Navigate to the property record. Click here on the **'Negotiator'** field

The screenshot displays the 'iam property' CRM interface. At the top, there's a navigation bar with links for 'My day', 'Lettings', 'Sales', 'Accounts', 'Reporting', and 'Communications'. The main header area shows the property address '34 Scalwell Lane, Seaton, EX12 2DJ' along with icons for '3' bedrooms and '1' bathroom, and a price of '£1400.00 null'. Below this, there are two tabs: 'Available' and '1 Tenant'. The 'Lead landlord' section shows 'Peter Jones' with a 'View Landlords' button. The 'Lead tenant' section shows 'Mr Joe Green' with a 'View Tenants' button. The 'Negotiator' field is highlighted with an orange circle and contains the text 'Training Dave'. Below the details is a 'PROPERTY PICTURES' section with an 'Upload' button and a placeholder image of a house roof.

- 2 From the drop down menu select the **CRM User** who will be the Property Manager



- 3 This assigns the property to this user, it does not affect anything that other CRM users can do on the CRM regarding this property.

Filtering the Property Manager view in Property Management

- 4 This process allows a user to only view their Property Management jobs in the 'My Jobs' list.

5 Click the filter icon at the bottom of the screen.

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

Create Job My Jobs Feedback Centre Invoices

Filter by Priority Level

High Medium Low Water Important Gas water Electric Court of Protection David Steve Ian None

Created 578299

8 Cleveland Court Grosvenor Place, Exeter (Fire)

ASSIGN Complete Job Cancel Job

Priorit Notes avdfs

Mr Todd Jones
Created: 19/08/2025 10
Updated: 19/08/2025 11
Updated by: Todd Jones

Created 578287

8 Cleveland Court Grosvenor Place, Exeter (Plumbing, Leak)

ASSIGN Complete Job Cancel Job

Priorit Notes Lea...

Miss Linda Miles
Created: 19/08/2025 10
Updated: 19/08/2025 11
Updated by: Toppsy Tur

Live 530104

Priorit

6 Click the "Select negotiators" field.

Completed

Contractor Completed

Cancelled

Start Date 19/02/2025 CLEAR

End Date 19/08/2025 CLEAR

Users Select Users

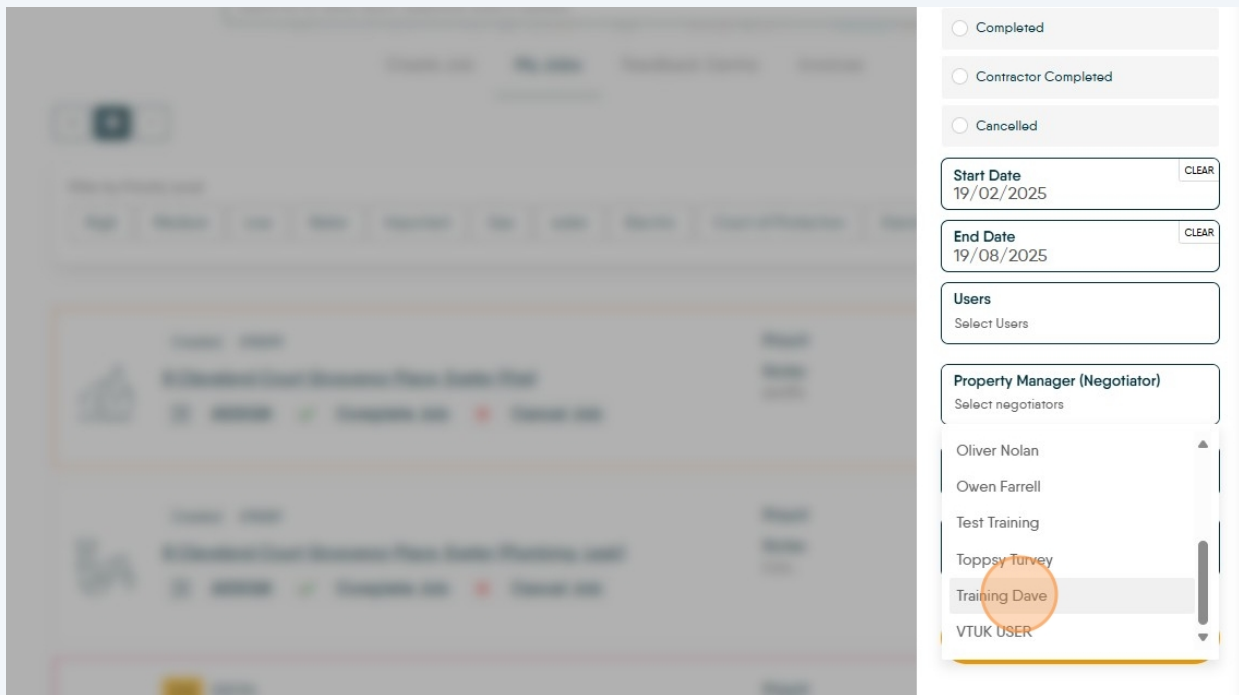
Property Manager (Negotiator) Select negotiators

Property Search for Properties

Contractors Select Contractors

Filter

- 7 From the drop down menu select the name of the user you wish to filter by.



Completed

Contractor Completed

Cancelled

Start Date
19/02/2025

End Date
19/08/2025

Users
Select Users

Property Manager (Negotiator)
Select negotiators

Oliver Nolan

Owen Farrell

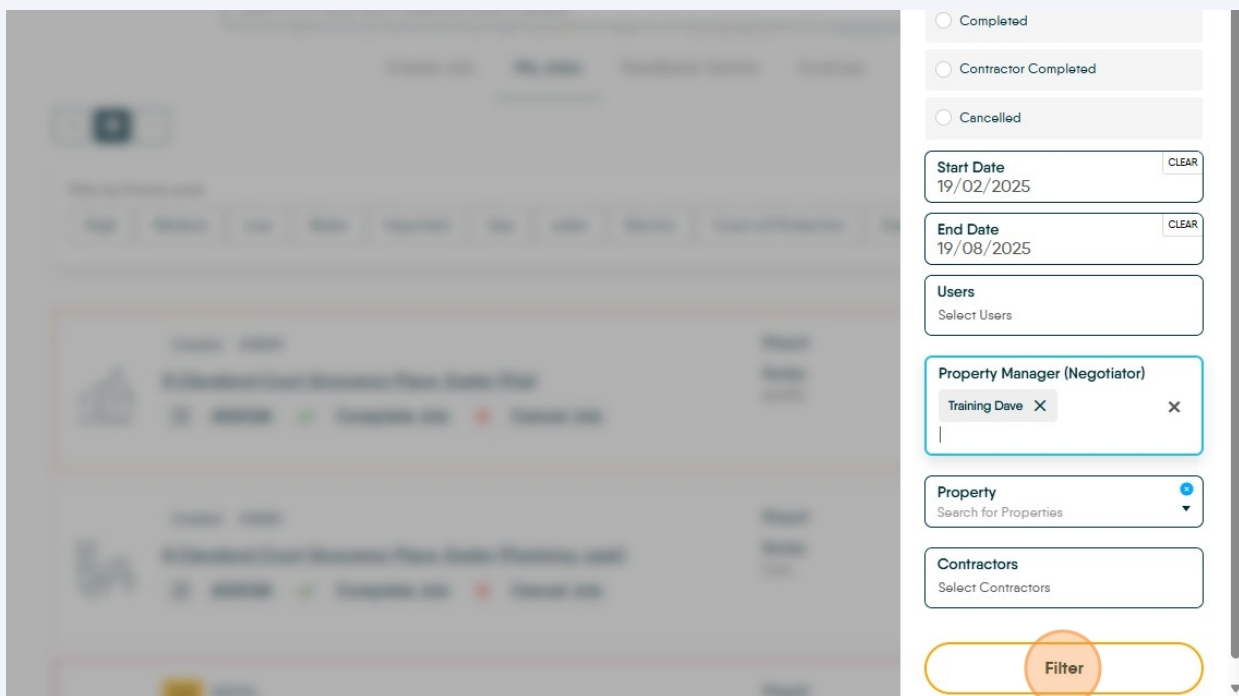
Test Training

Toppsy Turvey

Training Dave

VTUK USER

- 8 Click "Filter"



Completed

Contractor Completed

Cancelled

Start Date
19/02/2025

End Date
19/08/2025

Users
Select Users

Property Manager (Negotiator)
Training Dave X

Property
Search for Properties

Contractors
Select Contractors




Filter




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The 'My Jobs' screen will now only show the filtered results.

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


Create Job **My Jobs** Feedback Centre Invoices



Filter by Priority Level

High Medium Low Water Important Gas water Electric Court of Protection David Steve Ian None



Live 530104

34 Scalwell Lane, Seaton (Smell Gas)

 **Complete Job**  **Cancel Job**

Priorit

Notes
Sm... Contractor: Gary Cox (Handyman)
Completion Date: 16/06/2025

Mr Toppsy Turvey
Created: 16/06/2025 11:
Updated: 16/06/2025 11:
Updated by: Toppsy Turvey

