

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).



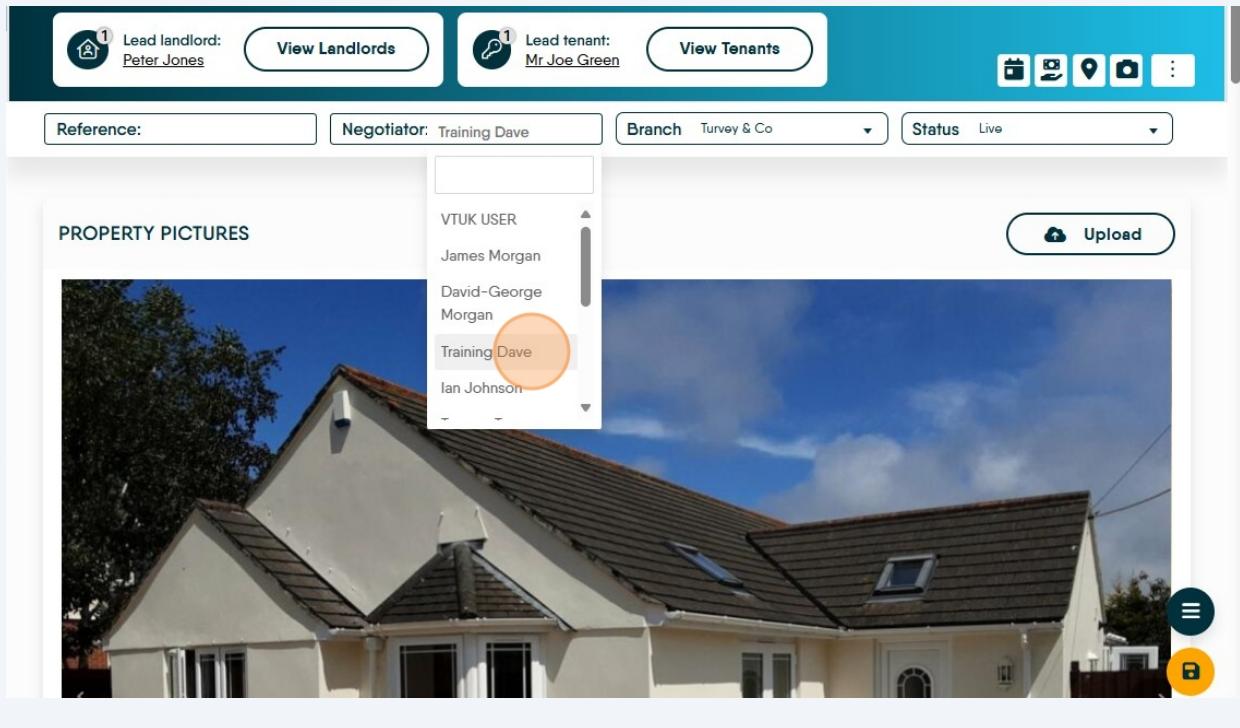
This process requires the Property Managers to have access to CRM, as a minimum access to the Property Management module. If you have any questions please speak to CRM Support. crm.support@iamproperty.com 01865 860870

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

The screenshot shows the iam property CRM interface. At the top, there is a navigation bar with links for 'My day', 'Lettings', 'Sales', 'Accounts', 'Reporting', 'Communications', and various icons for appraisals, warnings, and user management. The main content area displays a property record for '34 Scalwell Lane, Seaton, EX12 2DJ'. Key details shown include '3 Bed', '1 Bath', and a price of '£1400.00 null'. Below this, there are sections for 'Lead landlord' (Peter Jones) and 'Lead tenant' (Mr Joe Green). The 'Negotiator' field is highlighted with a red circle and contains the value 'Training Dave'. Further down, there are sections for 'Reference', 'Branch' (Turvey & Co), 'Status' (Live), and 'PROPERTY PICTURES' with an 'Upload' button. A large image of the property's exterior is displayed.

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

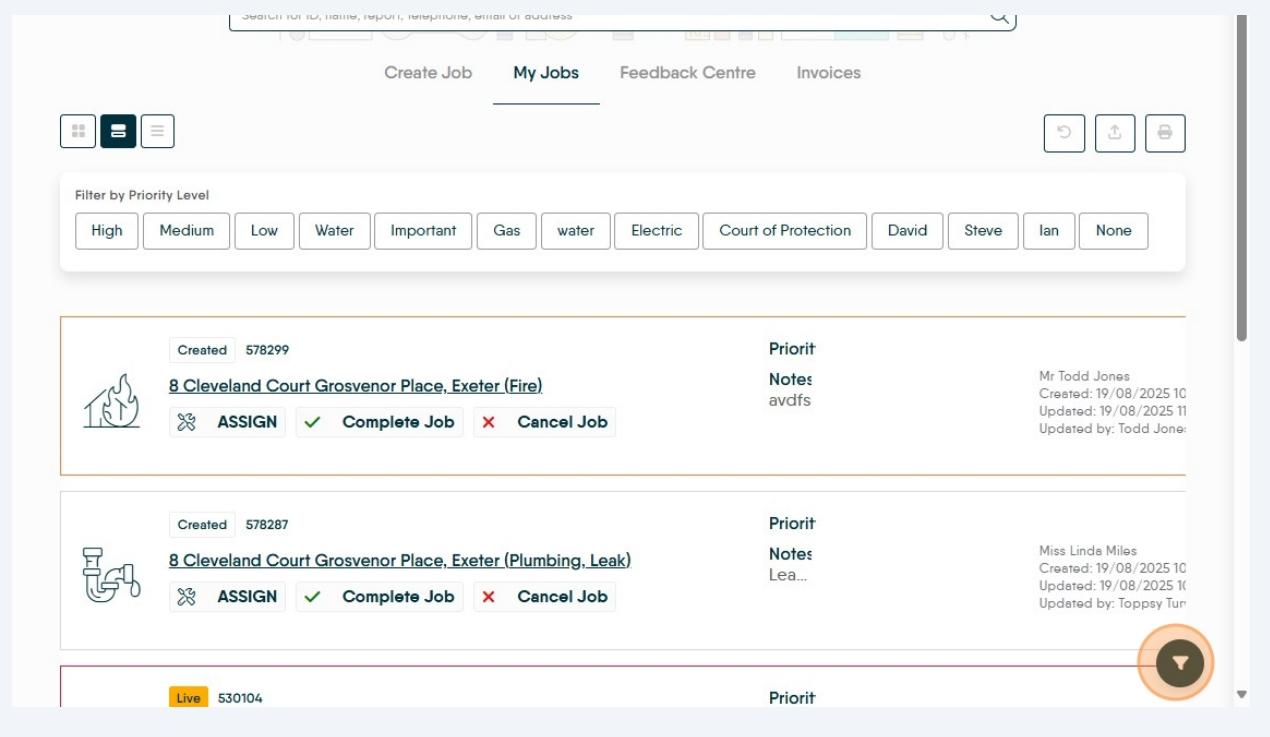


3 This assigns the property to this user, it does not affect anything that other CRM users can do on the CRM regarding this property.

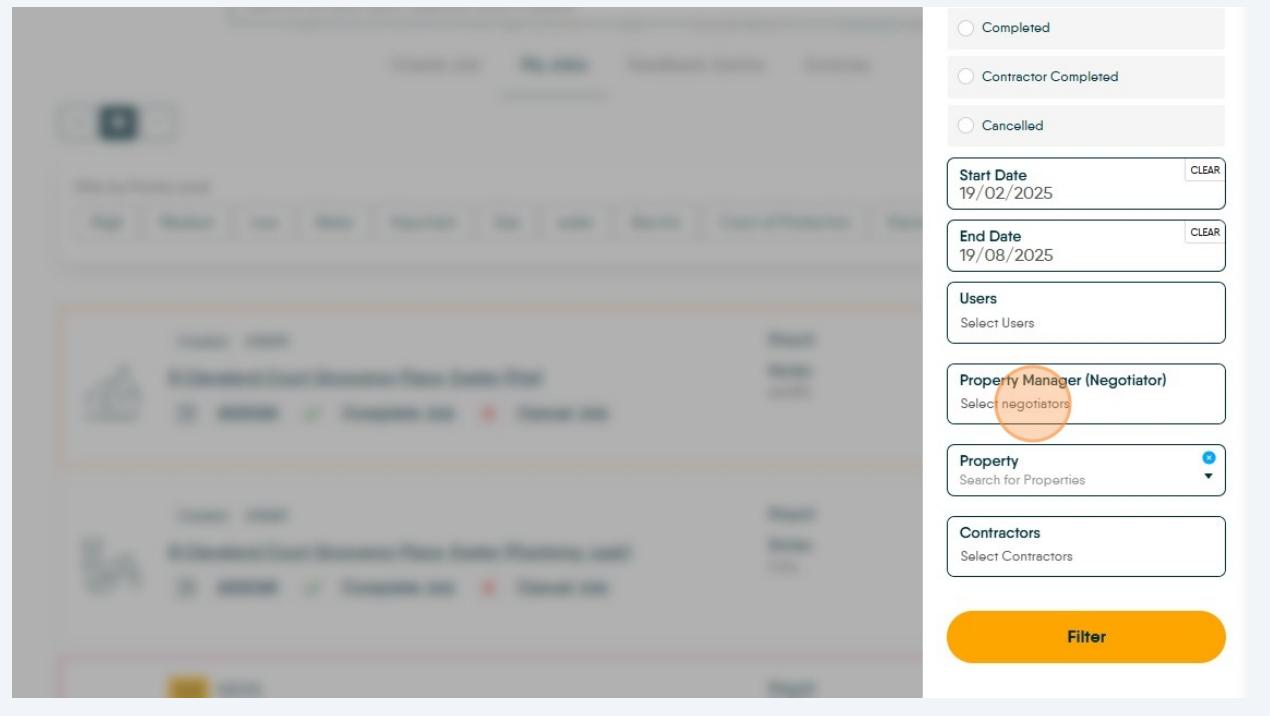
Filtering the Property Manager view in Property Management

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

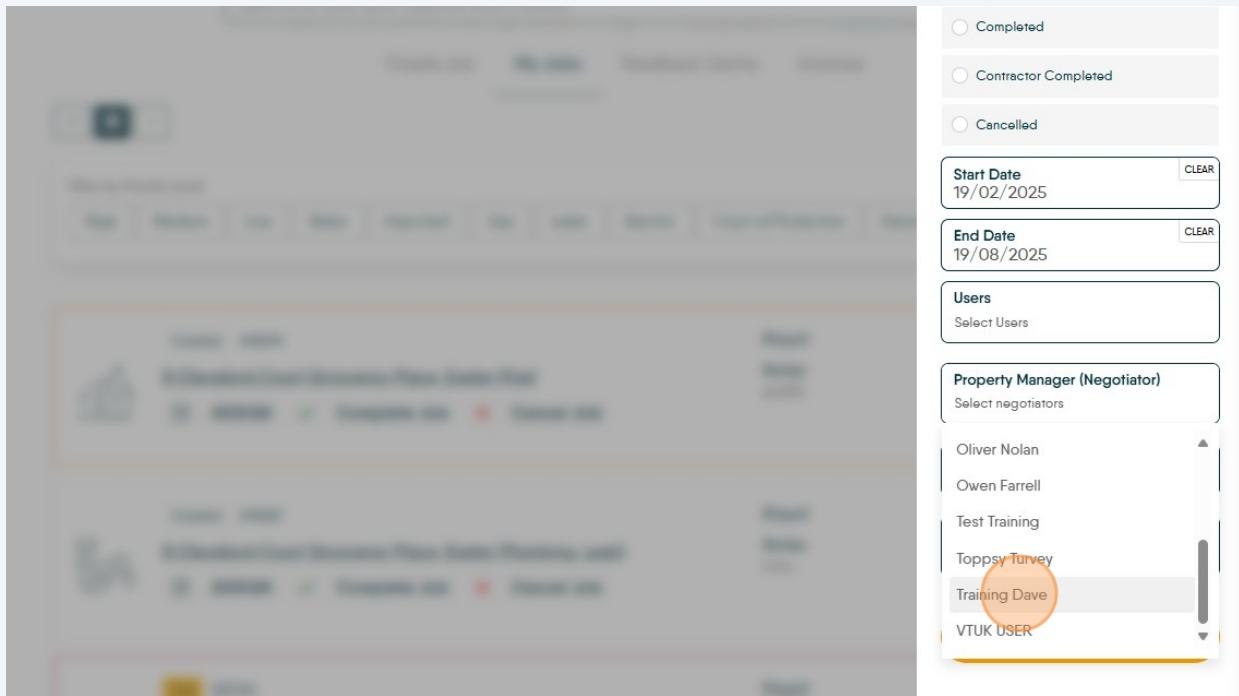
5 Click the filter icon at the bottom of the screen.



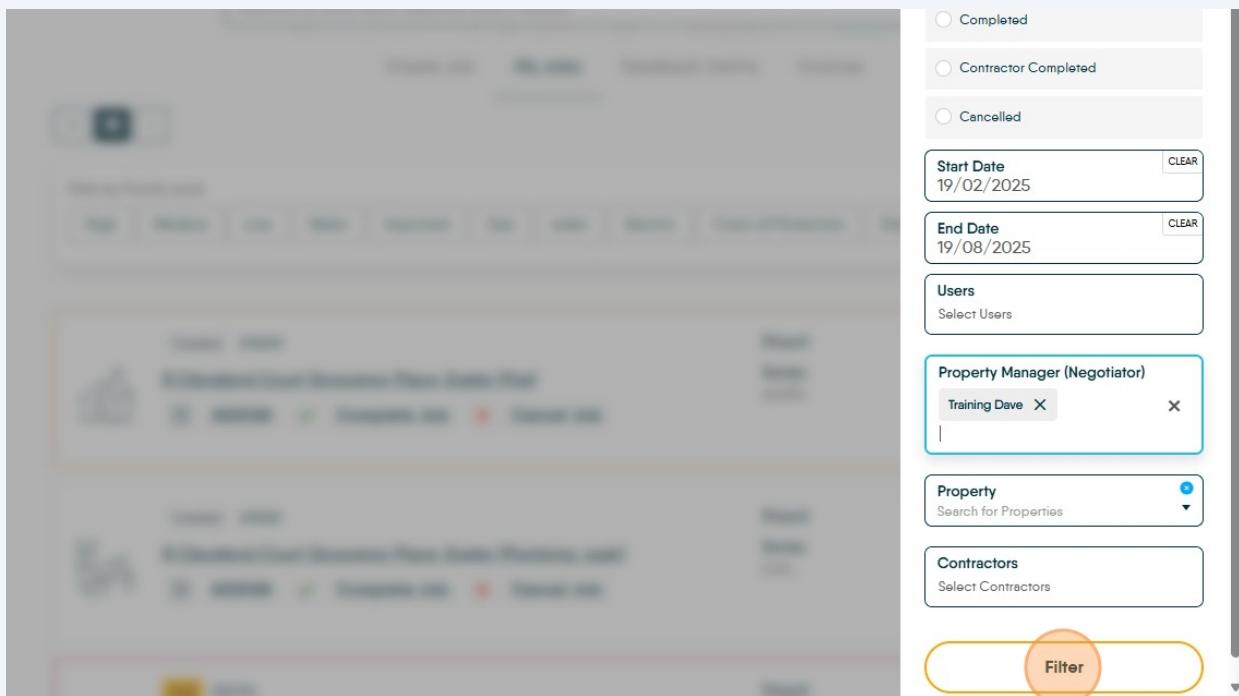
6 Click the "Select negotiators" field.



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

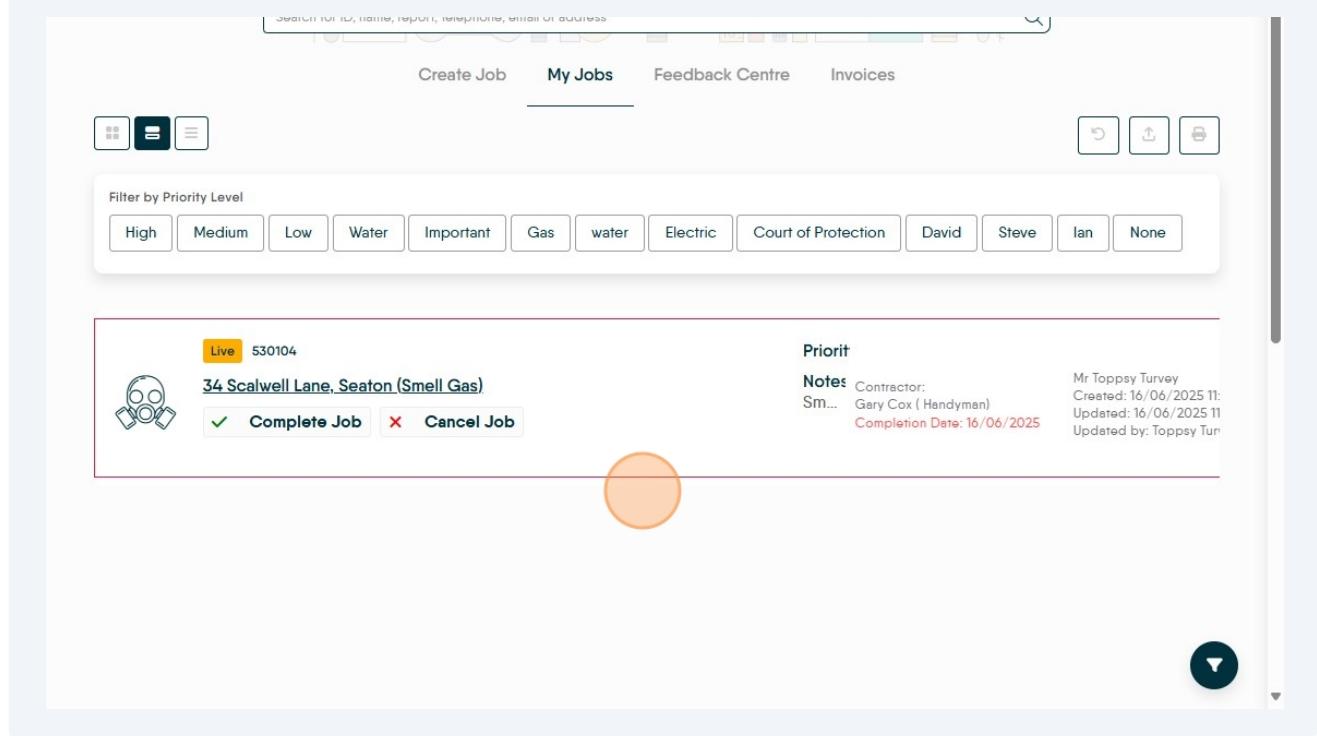


8 Click "Filter"



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



The screenshot shows the 'My Jobs' screen of a software application. At the top, there are navigation links: 'Create Job', 'My Jobs' (which is underlined, indicating it is the active page), 'Feedback Centre', and 'Invoices'. Below the navigation is a toolbar with icons for 'List View', 'Grid View', and 'Report View'. To the right of the toolbar are icons for 'Print', 'Upload', and 'Download'.

Under the toolbar, there is a 'Filter by Priority Level' section with buttons for 'High', 'Medium', 'Low', 'Water', 'Important', 'Gas', 'water', 'Electric', 'Court of Protection', 'David', 'Steve', 'Ian', and 'None'. The 'High' button is highlighted.

The main content area displays a single job entry. The job is marked as 'Live' and has the ID '530104'. The address is listed as '34 Scalwell Lane, Seaton (Smell Gas)'. To the left of the address is a small icon of a person wearing a gas mask. Below the address are two buttons: a green 'Complete Job' button with a checkmark icon and a red 'Cancel Job' button with a cross icon. A large orange circle is overlaid on the right side of the job entry.

On the far right of the screen, there is a vertical sidebar with a dark blue header and a white body. The sidebar contains the text 'Mr Topsy Turvey', 'Created: 16/06/2025 11', 'Updated: 16/06/2025 11', and 'Updated by: Topsy Tur'. At the bottom of the sidebar is a dark blue circular button with a white downward-pointing arrow icon.