

Property Management - Update Job Completion Date and Status



This guide provides a step-by-step process for updating job completion dates and statuses in the CRM system, ensuring accurate tracking of tasks.

By following these instructions, users can efficiently manage their workload, maintain clear communication with contractors, and keep records up to date. This is essential for effective property management and enhances overall operational efficiency. Viewing this guide will streamline your task management and improve accountability in your projects.

1 Navigate to <https://crm.iamproperty.com/Toolbox/TaskList>

The screenshot displays the 'TaskList' page in the iam property CRM. The page features a navigation bar with tabs for 'My day', 'Lettings', 'Sales', 'Accounts', 'Reporting', and 'Communications'. A search bar is prominently displayed with the text 'Search for reports that people have created for you'. Below the search bar, there are buttons for 'Create Job', 'My Jobs', 'Feedback Centre', and 'Invoices'. A filter section titled 'Filter by Priority Level' includes buttons for 'High', 'MEDIUM', 'Low', 'Water Leak', 'Water', 'Gas', 'Electric', 'Court of Protection', 'David', 'Steve', 'Ian', and 'None'. The main content area shows a list of jobs. The first job is '24 Westgarth Terrace, Darlington (Gas Heating)' with a status of 'Live' and a priority of 'None'. The second job is '1 Park View Road, Witney (Electrical Fault)' with a status of 'Created' and a priority of 'LOW'.

Job ID	Status	Priority	Notes	Contractor	Completion Date	Created	Updated	Updated by
594066	Live	None	fault	DM Electronics	27/09/2025	02/09/2025 10:31:56	24/09/2025 15:27:39	Training Dave
588973	Created	LOW	Burnt out living room socket			20/08/2025 12:15:39		

2

The 'Completion Date' for the job is shown on the line for the job in the Property Management task list.

The screenshot displays a software interface for managing property tasks. At the top, there are three icons: a circular arrow (refresh), an upward arrow (upload), and a printer icon. Below these is a horizontal filter bar with buttons for 'Water Leak', 'Water', 'Gas', 'Electric', 'Court of Protection', 'David', 'Steve', 'Ian', and 'None'. The main area contains a list of jobs. The first job is highlighted with a light blue background. It shows 'Priority: None' and 'Notes: fault'. A field labeled 'Contractor:' contains 'DM Electronics', and the 'Completion Date:' is '27/09/2025', which is enclosed in an orange rectangular box. To the right of this, it lists 'Miss Ella Petch', 'Created: 02/09/2025 10:31:56', 'Updated: 24/09/2025 15:27:39', and 'Updated by: Training Dave'. The second job is partially visible below, showing 'Priority: LOW' and 'Notes: Burnt out living room socket'. It lists 'Mr Ben Affleck', 'Created: 20/08/2025 12:15:39', 'Updated: 20/08/2025 12:15:39', and 'Updated by: Ian Henry'. A vertical scrollbar is on the right, and a dark blue circular button with a white downward arrow is at the bottom right of the list area.

Water Leak	Water	Gas	Electric	Court of Protection	David	Steve	Ian	None
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Priority: None Notes: fault	Contractor: DM Electronics Completion Date: 27/09/2025	Miss Ella Petch Created: 02/09/2025 10:31:56 Updated: 24/09/2025 15:27:39 Updated by: Training Dave
Priority: LOW Notes: Burnt out living room socket		Mr Ben Affleck Created: 20/08/2025 12:15:39 Updated: 20/08/2025 12:15:39 Updated by: Ian Henry

3

To change the Completion Date.

4 Click into the job record, by **clicking on the address line**.

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 HIGH MEDIUM Medium Low LOW Water Leak Water Gas Electric Court of Protection David Steve Ian None

	Live 594066 24 Westgarth Terrace, Darlington (Gas Heating)	Priority: None Notes: fault	Contractor: DM Electrics Completion Date: 27/09/2025	Miss Ella Petch Created: 02/09/2025 10:31:56 Updated: 24/09/2025 15:27:39 Updated by: Training
	Created 588973 1 Park View Road, Witney (Electrical Fault)	Priority: LOW Notes: Burnt out living room socket		Mr Ben Affleck Created: 20/08/2025 12:15:39 Updated: 20/08/2025 12:15:39 Updated by: Ian Henr

i Tip! This **MUST** done before the task is completed and saved.

If the task has been completed by the Contractor (shows 'Contractor Completed') and the completion date needs to be updated. Change the 'Contractor Completed' option to 'live', refresh the screen and then you can update the 'completion date' and re save as completed. This area is highlighted on the next screen.

If the agent has completed the task then it cannot be changed.

5 At the end of the 'Job Completion Date' line. Click "Edit Completion Date"

PLEASE NOTE: We will be performing essential server maintenance on the evening of 23 & 24 September from 19:00-22:00, during which time the CRM will be unavailable.

property My day Lettings Sales Accounts Reporting Communications My account

Management Maintenance Jobs Report #594066

24 Westgarth Terrace, Darlington

Job Fault
Gas Heating

Priority Level
Select Priority Level

fault

Live

Unassign

Resend to contractor

Sign In

Sign Out

Tenant(s) Offers Landlord(s) Contractor Comments Feedback Invoice Documents Audit

Upload Photos

Miss Ella Petchzagg.dave@gmail.com

24 Westgarth Terrace
Darlington
County Durham
DL1 2LA
UK

Vulnerable Occupier No
Access Authority Yes
Contact Details Consent No
Assigned to: DM Electrics
Created: 02/09/2025 10:31:56
Updated: 24/09/2025 15:27:39
Job Completion Date: 27/09/2025
Price Agreed: £0.00
Authorised Budget: £0.00

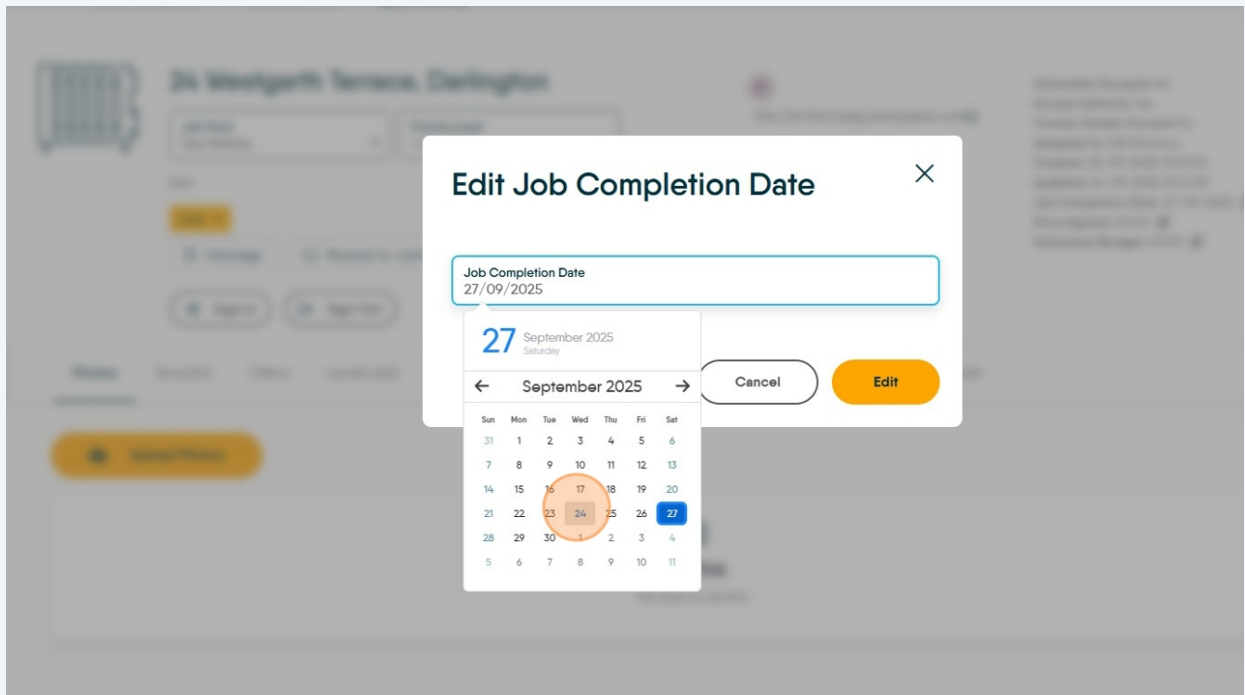
6 Click into here and from the next screen select the date you want to change to.

24 Westgarth Terrace, Darlington

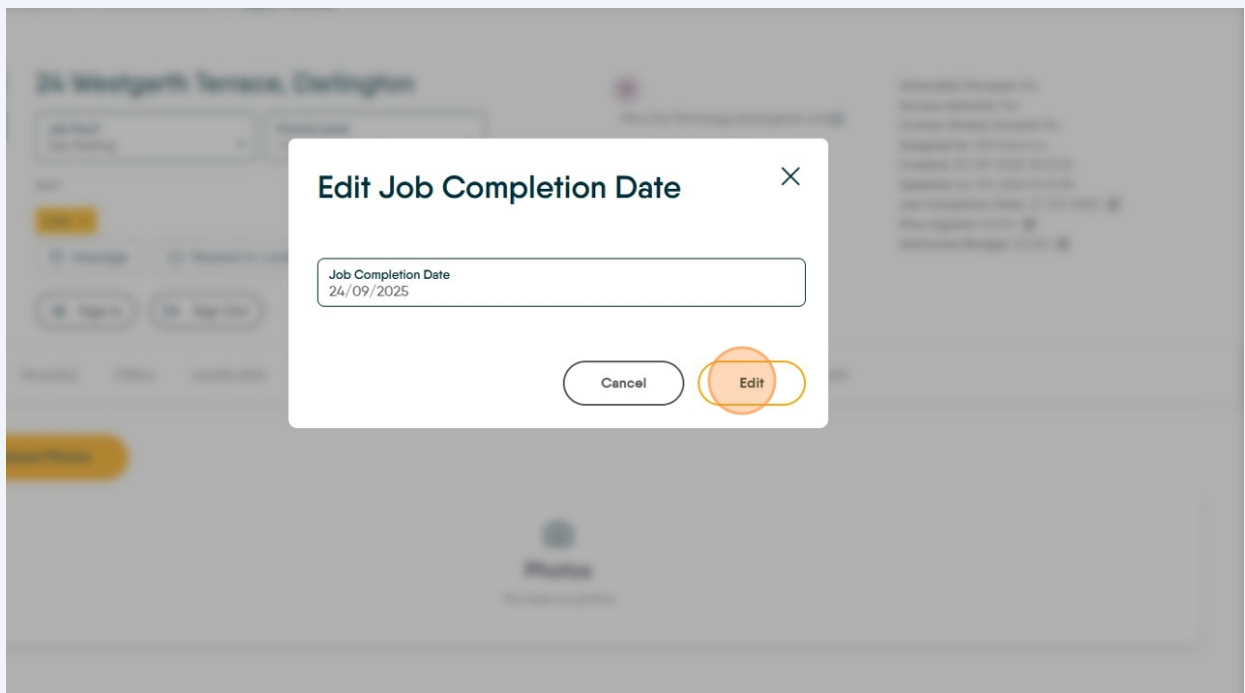
Edit Job Completion Date

Job Completion Date
27/09/2025

Cancel Edit



7 Click "**Edit**" to save the new date.



8

The **"Job Completion Date:"** will now show as updated on the screen and also in the task list

iam property My day Lettings Sales Accounts Reporting Communications My account

Property Management > Maintenance Jobs > Report #594066

24 Westgarth Terrace, Darlington

Job Fault: Gas Heating Priority Level: Select Priority Level

fault

Live

Unassign Resend to contractor

Sign In Sign Out

Miss Ella Petchzagg.dave@gmail.com

24 Westgarth Terrace
Darlington
County Durham
DL1 2LA
UK

Vulnerable Occupier No
Access Authority Yes
Contact Details Consent No
Assigned to: DM Electrics
Created: 02/09/2025 10:31:56
Updated: 24/09/2025 15:27:39
Job Completion Date: 24/09/2025
Price Agreed: £0.00
Authorised Budget: £0.00

Photos Tenant(s) Offers Landlord(s) Contractor Comments Feedback Invoice Documents Audit

Upload Photos

Photos
You have no photos

9

If required. Now click **"Completed"** or other option in the dropdown menu.

iam property My day Lettings Sales Accounts Reporting Communications My account

Property Management > Maintenance Jobs > Report #594066

24 Westgarth Terrace, Darlington

Job Fault: Gas Heating Priority Level: Select Priority Level

fault

Live

Completed

Cancelled

Resend to contractor

Sign Out

Miss Ella Petchzagg.dave@gmail.com

24 Westgarth Terrace
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County Durham
DL1 2LA
UK

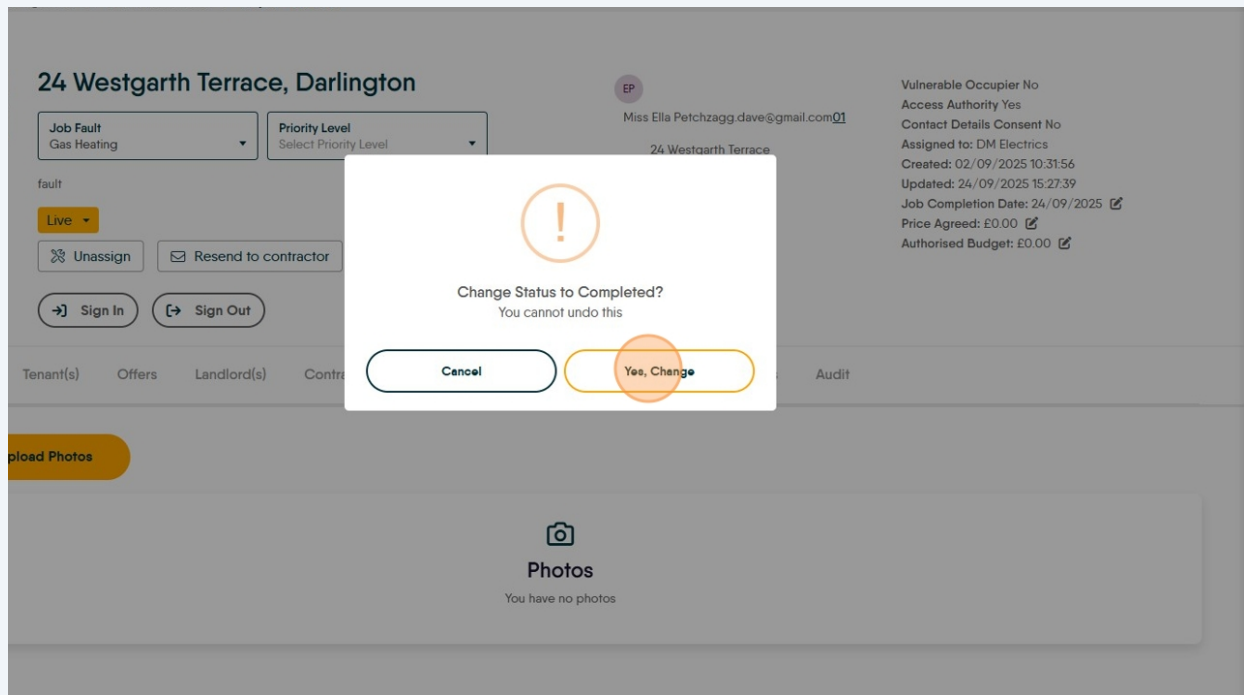
Vulnerable Occupier No
Access Authority Yes
Contact Details Consent No
Assigned to: DM Electrics
Created: 02/09/2025 10:31:56
Updated: 24/09/2025 15:27:39
Job Completion Date: 24/09/2025
Price Agreed: £0.00
Authorised Budget: £0.00

Photos Tenant(s) Offers Landlord(s) Contractor Comments Feedback Invoice Documents Audit

Upload Photos

Photos
You have no photos

10 Click "Yes, Change"



Tracking Tasks in the Lettings Activity List

- 11 All the jobs in this menu will be either approaching or past their 'Completion Date' as set in the task when it was created.

12 Click "Jobs Outstanding"

The screenshot shows the 'iam property' dashboard. At the top, there are seven summary cards: Properties (124), Landlords (92), Tenants (70), Applicants (30), PB Tenants (29), Contractors (30), and Key Control (with a key icon). Below these is the 'Activity List' on the left, which includes items like Rent Review (7), Public Liability (3), Hmo Licence Expiry (1), Calls Upcoming/Outstanding (31), **Jobs Outstanding (5)** (highlighted with an orange circle), Keys Due Back (5), Pb Tenancies Commencing (28), and Viewings Requiring Feedback (4). The main area on the right displays a message: 'Please select an activity list item to begin' with a calendar icon.

13 All the currently outstanding jobs will show on the screen, as will all the details about the job. e.g. **Completion Date** "24/09/2025"

The screenshot shows the 'iam property' dashboard with the 'Jobs Outstanding' section selected. The top navigation bar includes 'My day', 'Lettings', 'Sales', 'Accounts', 'Reporting', 'Communications', and 'My account'. The summary cards are the same as in the previous screenshot. The 'Activity List' on the left is identical, with 'Jobs Outstanding' highlighted. The main area displays a table titled 'Jobs Outstanding' with columns: Negotiator, Property, Landlord, and Contractor. The table lists five outstanding jobs. At the bottom, there is a pagination bar showing '1 to 5 of 5' and 'Page 1 of 1'.

	Negotiator	Property	Landlord	Contractor
⋮	☐ Ian Henry	1 Park View Road, Witney	Chris Hemsworth	Auf Wiedersehen, Pet Proj
⋮	☐ Ian Henry	1 Park View Road, Witney	Chris Hemsworth	Auf Wiedersehen, Pet Proj
⋮	☐ Ian Henry	1 Park View Road, Witney	Chris Hemsworth	Auf Wiedersehen, Pet Proj
⋮	☐ Ian Henry	6 Park View Road, Witney	Robert De Niro	
⋮	☐ Training Dave	24 Westgarth Terrace, Darlington	Pamela Green	Morgan Contracting

Landlords

92

Tenants

70

Applicants

30

PB Tenants

29

Contractors

30

Key Control

Property List

Property Review

7

Public Liability

3

Hmo Licence Expiry

1

Calls Upcoming/Outstanding

31

Jobs Outstanding

5

Keys Due Back

5

Pb Tenancies Commencing

28

Viewings Requiring Feedback

4

Jobs Outstanding

Search

	Description	Completion Date	Amount	Management Type
	Burnt out socket in living room.	20/02/2025	£ 0.00	Fully Managed
	Socket	09/04/2025	£ 0.00	Fully Managed
	Burnt out socket in living room.	05/08/2025	£ 0.00	Fully Managed
	Garden Tidy Up.		£ 0.00	Fully Managed
	toilet broked	24/09/2025	£ 0.00	Fully Managed

1 to 5 of 5

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Page 1 of 1

14

Click "**3 dot menu**" from this menu you can perform various tasks. Including opening the task in Property Management, where you could edit the date.

Landlords

92

Tenants

70

Applicants

30

PB Tenants

29

Contractors

30

Key Control

Property List

Property Review

7

Public Liability

3

Hmo Licence Expiry

1

Calls Upcoming/Outstanding

31

Jobs Outstanding

5

Keys Due Back

5

Pb Tenancies Commencing

28

Viewings Requiring Feedback

4

Jobs Outstanding

Search

	Negotiator	Property	Landlord	Contractor
	☐ Ian Henry	1 Park View Road, Witney	Chris Hemsworth	Auf Wiedersehen, Pet Proj
	☐ Ian Henry	1 Park View Road, Witney	Chris Hemsworth	Auf Wiedersehen, Pet Proj
	☐ Ian Henry	1 Park View Road, Witney	Chris Hemsworth	Auf Wiedersehen, Pet Proj
	☐ Ian Henry	6 Park View Road, Witney	Robert De Niro	
	☒ Training Dave	24 Westgarth Terrace, Darlington	Pamela Green	Morgan Contracting

Log Call (Contractor)

Open In property management

New Journal Entry

View Property

View Landlord

1 to 5 of 5

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Page 1 of 1

9

15

Clicking into the checkbox to the left of the task and then clicking on the Email/SMS or Letter options will allow you to send a communication to the Contractor about the task.

The screenshot shows the 'iam property' dashboard. At the top, there are navigation tabs: 'My day', 'Lettings', 'Sales', 'Accounts', 'Reporting', and 'Communications'. Below these are summary cards for 'Properties' (124), 'Landlords' (92), 'Tenants' (70), 'Applicants' (30), 'PB Tenants' (29), 'Contractors' (30), and 'Key Control'. The main section is divided into an 'Activity List' on the left and a 'Jobs Outstanding' table on the right. The 'Activity List' includes items like 'Rent Review', 'Public Liability', 'Hmo Licence Expiry', 'Calls Upcoming/Outstanding', 'Jobs Outstanding', 'Keys Due Back', and 'Pb Tenancies Commencing'. The 'Jobs Outstanding' table has columns for 'Negotiator', 'Property', 'Landlord', and 'Contractor'. The task 'Training Dave' is highlighted, and its communication options (Email, SMS, Letter) are circled in orange.

	Negotiator	Property	Landlord	Contractor
☐	Ian Henry	1 Park View Road, Witney	Chris Hemsworth	Auf Wiedersehen, Pet Proj
☐	Ian Henry	1 Park View Road, Witney	Chris Hemsworth	Auf Wiedersehen, Pet Proj
☐	Ian Henry	1 Park View Road, Witney	Chris Hemsworth	Auf Wiedersehen, Pet Proj
☐	Ian Henry	6 Park View Road, Witney	Robert De Niro	
☒	Training Dave	24 Westgarth Terrace, Darlington	Pamela Green	Morgan Contracting

16

An example of the process from the Activity list.

17

Click here.
 Click "Open In property management"
 Click "24/09/2025"
 Click "Edit Completion Date"
 Click this text field.
 Click "26"
 Click "Edit"
 Click "26/09/2025"

Properties124

Landlords92

Tenants70

Applicants30

PB Tenants29

Contractors30

Key Contro

Activity List

-  Rent Review 7 
-  Public Liability 3 
-  Hmo Licence Expiry 1 
-  Calls Upcoming/Outstanding 31
-  Jobs Outstanding 5 
-  Keys Due Back 5 
-  Pb Tenancies Commencing 28 
-  Viewings Requiring Feedback 4 

Jobs Outstanding

	Negotiator	Property	Landlord	Contractor
⋮	☐ Ian Henry	1 Park View Road, Witney	Chris Hemsworth	Auf Wiedersehen, P
⋮	☐ Ian Henry	1 Park View Road, Witney	Chris Hemsworth	Auf Wiedersehen, P
⋮	☐ Ian Henry	1 Park View Road, Witney	Chris Hemsworth	Auf Wiedersehen, P
⋮	☐ Ian Henry	6 Park View Road, Witney	Robert De Niro	
⋮	☒ Training Dave	24 Westgarth Terrace, Darlington	Pamela Green	Morgan Contracting

1 to 5 of 5

Page 1 of 1

Properties124

Landlords92

Tenants70

Applicants30

PB Tenants29

Contractors30

Key Contro

Activity List

-  Rent Review 7 
-  Public Liability 3 
-  Hmo Licence Expiry 1 
-  Calls Upcoming/Outstanding 31
-  Jobs Outstanding 5 
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Jobs Outstanding

	Negotiator	Property	Landlord	Contractor
⋮	☐ Ian Henry	1 Park View Road, Witney	Chris Hemsworth	Auf Wiedersehen, P
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⋮	☐ Ian Henry	1 Park View Road, Witney	Chris Hemsworth	Auf Wiedersehen, P
⋮	☐ Ian Henry	6 Park View Road, Witney	Robert De Niro	
⋮	☒ Training Dave	24 Westgarth Terrace, Darlington	Pamela Green	Morgan Contracting

1 to 5 of 5

Page 1 of 1

- Log Call (Contractor)
- Open In property management
- New Journal Entry
- View Property
- View Landlord

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property

My dayLettingsSalesAccountsReportingCommunications

My account

ManagementMaintenance JobsReport #588885

24 Westgarth Terrace, Darlington

Job FaultToilet

Priority LevelSelect Priority Level

toilet broken

Live

UnassignResend to contractor

Sign InSign Out

EP

Miss Ella Petchzagg.dave@gmail.com

24 Westgarth Terrace
Darlington
County Durham
DL1 2LA
UK

Vulnerable Occupier No

Access Authority Yes

Contact Details Consent No

Assigned to: Morgan Contracting

Created: 20/08/2025 10:59:38

Updated: 24/09/2025 15:29:53

Job Completion Date: 24/09/2025

Price Agreed: £0.00

Authorised Budget: £0.00

anytime lm desperate

Tenant(s)OffersLandlord(s)ContractorCommentsFeedbackInvoiceDocumentsAudit

Upload Photos

PLEASE NOTE: We will be performing essential server maintenance on the evening of 23 & 24 September from 19:00-22:00, during which time the CRM will be unavailable.

property

My dayLettingsSalesAccountsReportingCommunications

My account

ManagementMaintenance JobsReport #588885

24 Westgarth Terrace, Darlington

Job FaultToilet

Priority LevelSelect Priority Level

toilet broken

Live

UnassignResend to contractor

Sign InSign Out

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Created: 20/08/2025 10:59:38

Updated: 24/09/2025 15:29:53

Job Completion Date: 24/09/2025

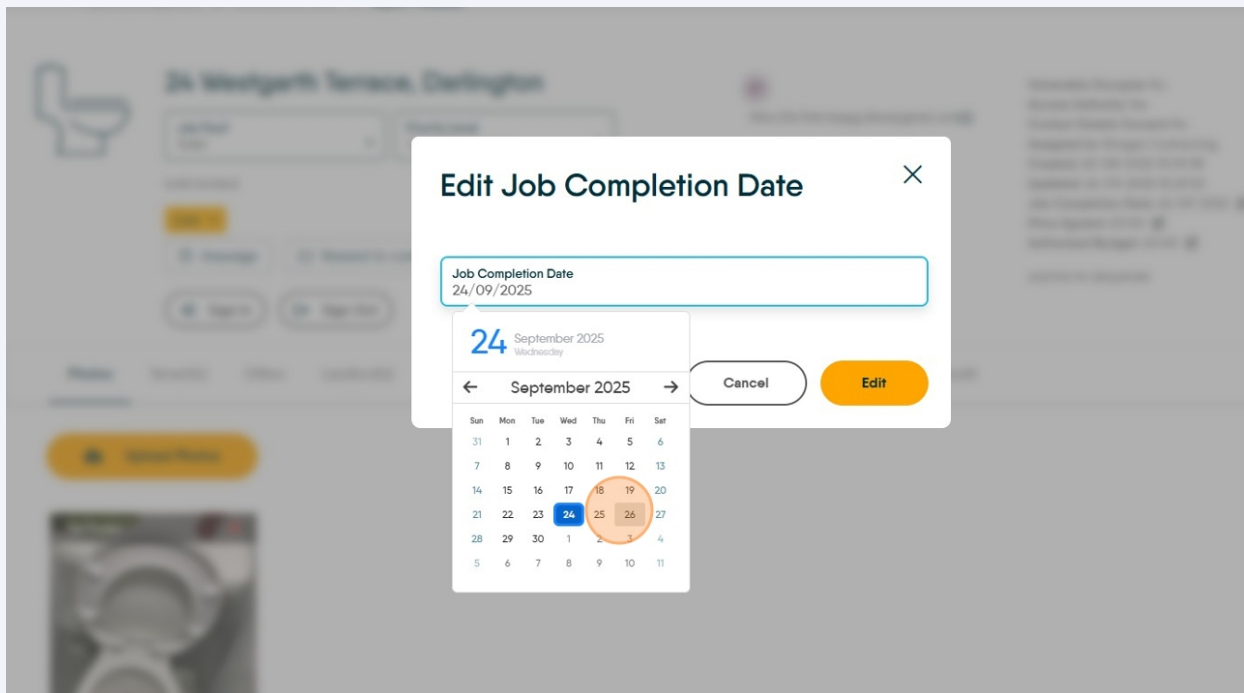
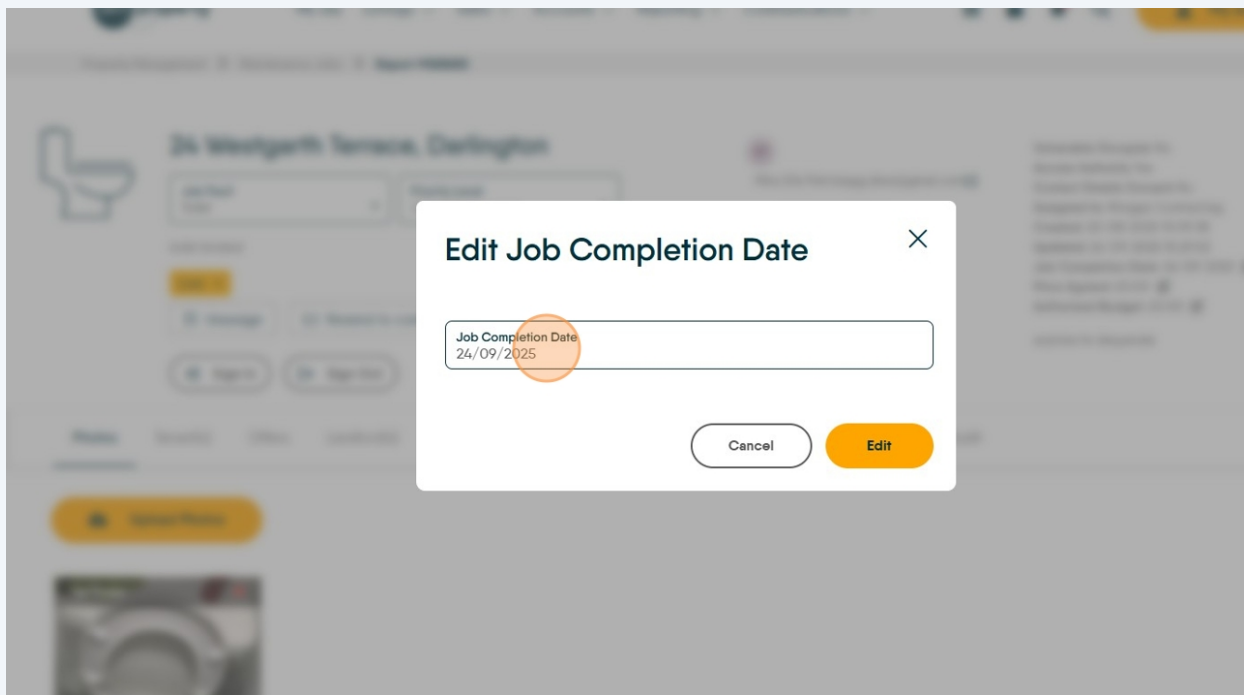
Price Agreed: £0.00

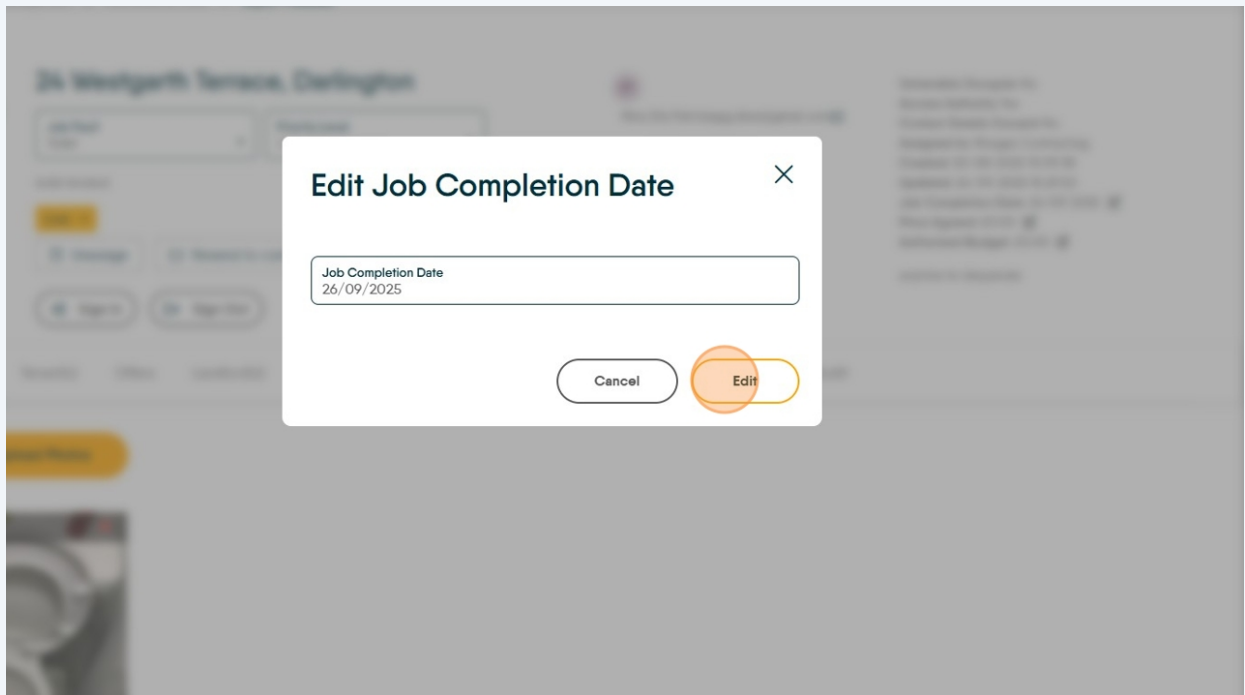
Authorised Budget: £0.00

anytime lm desperate

Tenant(s)OffersLandlord(s)ContractorCommentsFeedbackInvoiceDocumentsAudit

Upload Photos





24 Westgarth Terrace, Darlington

Priority Level
Select Priority Level



☒ Resend to contractor

[→ Sign Out](#)

EP

Miss Ella Petchzagg.dave@gmail.com

24 Westgarth Terrace
Darlington
County Durham
DL1 2LA
UK

Vulnerable
Access A
Contact C
Assigned
Created: :
Updated:
Job Comp
Price Agre
Authorise
anytime In

Landlord(s)

Contractor

Comments

Feedback

Invoice

Documents

Audit

18 Updated "**Completion Date**" shows in task list.

out living room socket			Mr Ben Affleck Created: 20/08/2025 12:15:39 Updated: 20/08/2025 12:15:39 Updated by: Ian Henry		
roked			Miss Ella Petch Created: 20/08/2025 10:59:38 Updated: 24/09/2025 15:32:53 Updated by: Training Dave		

Contractor:
Morgan Contracting
Completion Date:
26/09/2025

