

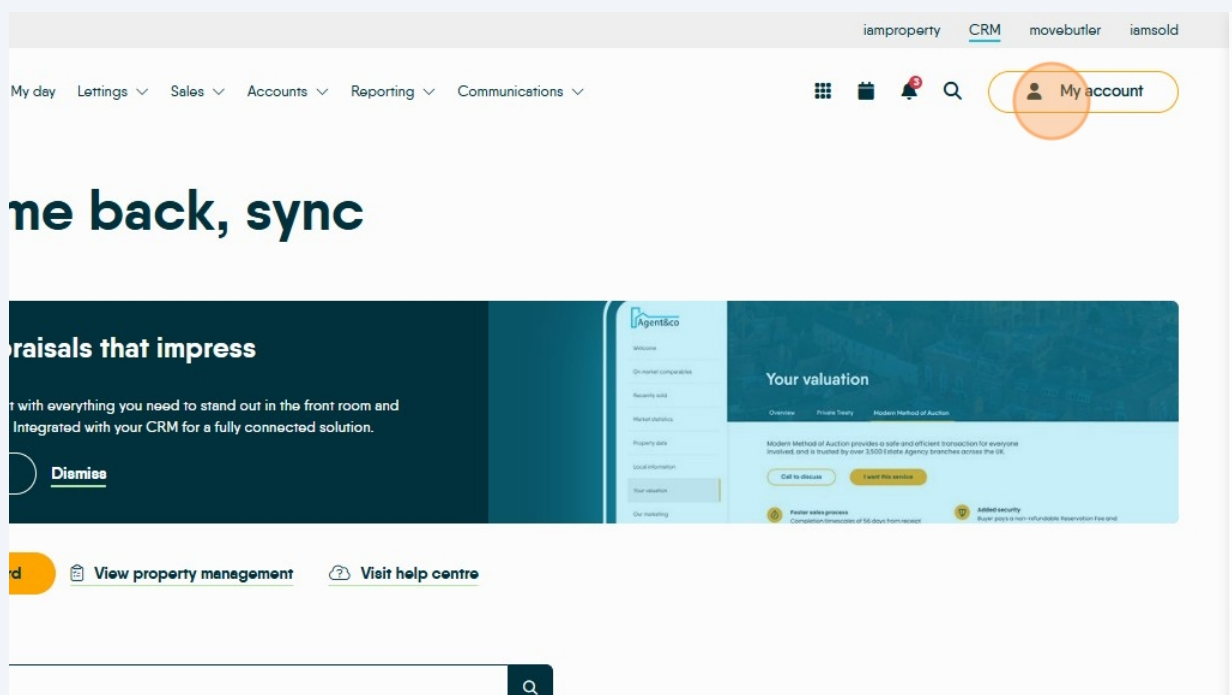
Configuring Property Management Settings



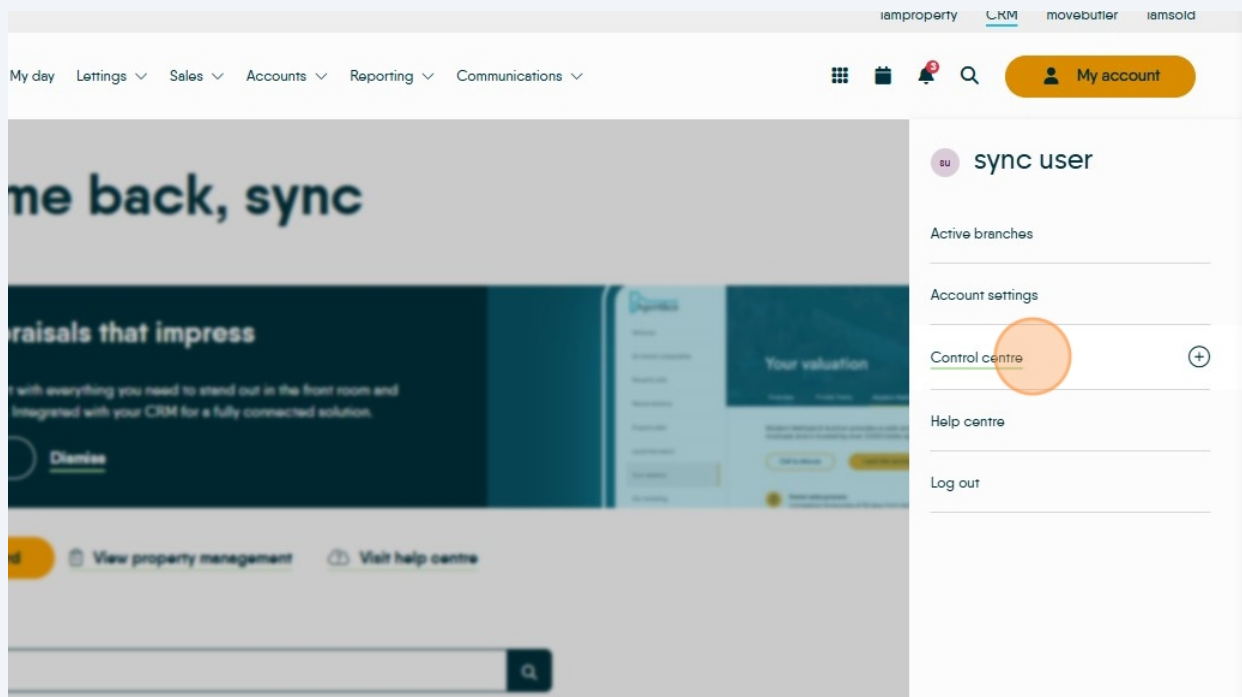
This guide provides instructions for configuring property management settings and notifications, ensuring efficient communication and task management. By following the steps outlined, users can customise their notification preferences, embed instructional videos, and prioritise tasks effectively.

i Property Management Settings are divided into two sections. One covers the tenant-facing side that they will see when reporting an issue, one covers the side you as the agent will see. Jump to step 20 if you need the agent side.

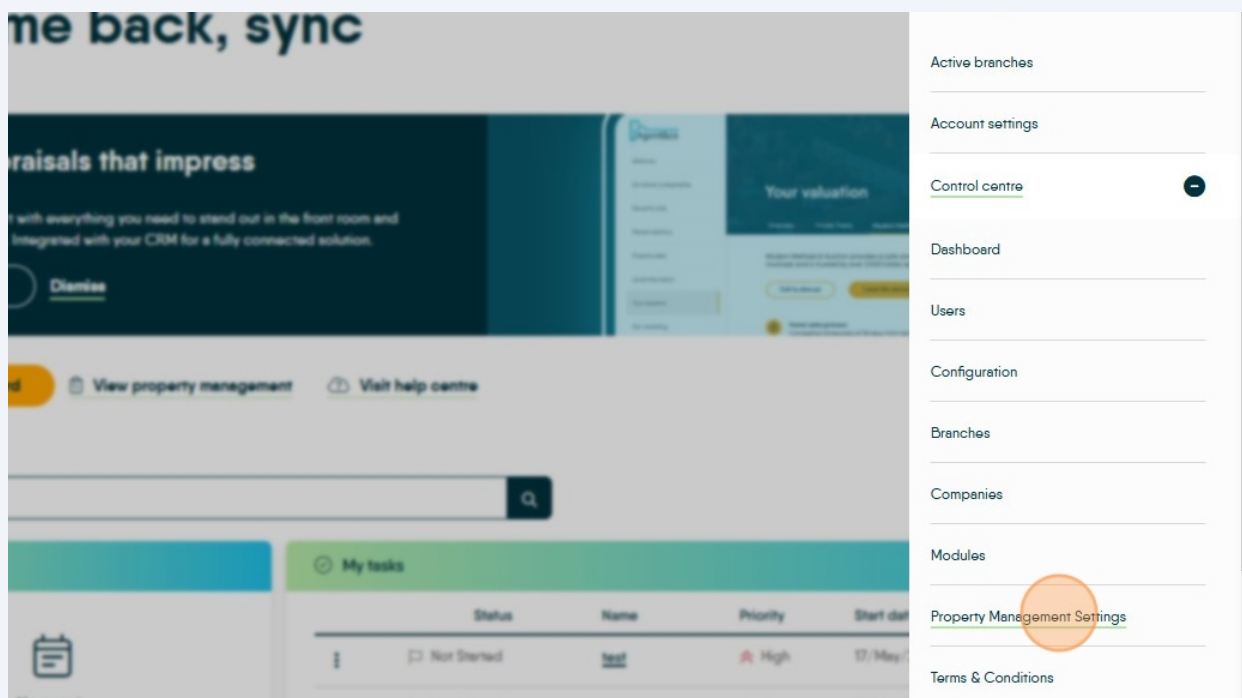
1 Click "My Account"



2 Click "Control centre"



3 Click "Property Management Settings"



4 Here you control which tenants have access to Property Management.

Branch
Sales Pipeline Test

Which management level of tenant can use property management

Fully Managed ☒

Let Only ☐

Rent Collect ☐

Contractor offer settings

Display tenant contact details on job assigned email? ☐

Configure job categories

5 This is the master switch for tenant details displaying for the contractor.

Fully Managed ☒






Let Only ☐

Rent Collect ☐

Contractor offer settings

Display tenant contact details on job assigned email? ☒

Configure job categories

 Electrical Fault	 Fire	 Plumbing, Leak	 Locks and Keys	 Smell Gas
---	---	---	--	--



Without turning this master switch on, tenant details will not display, even if switched on to do so when creating the job.

6











Numbers in the top corner of a job category shows how many subcategories it contains.

iamproperty CRM

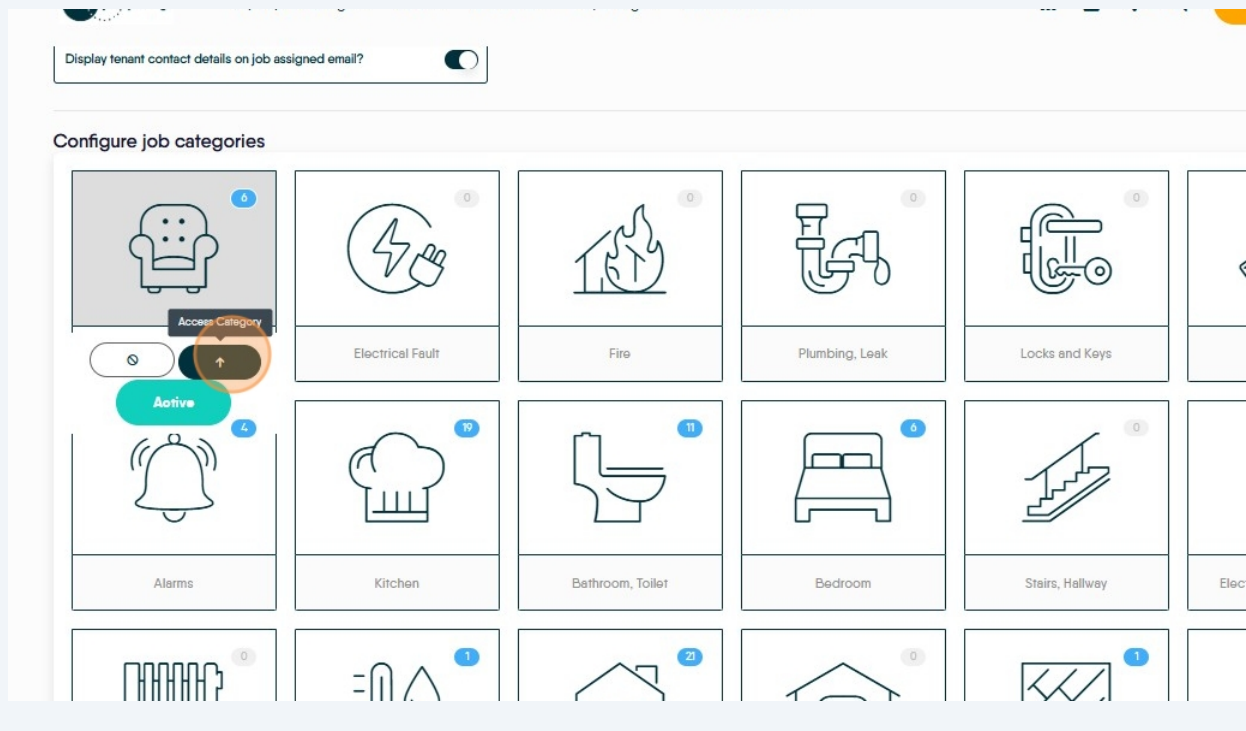
My day Lettings Sales Accounts Reporting Communications

Display tenant contact details on job assigned email? ☐

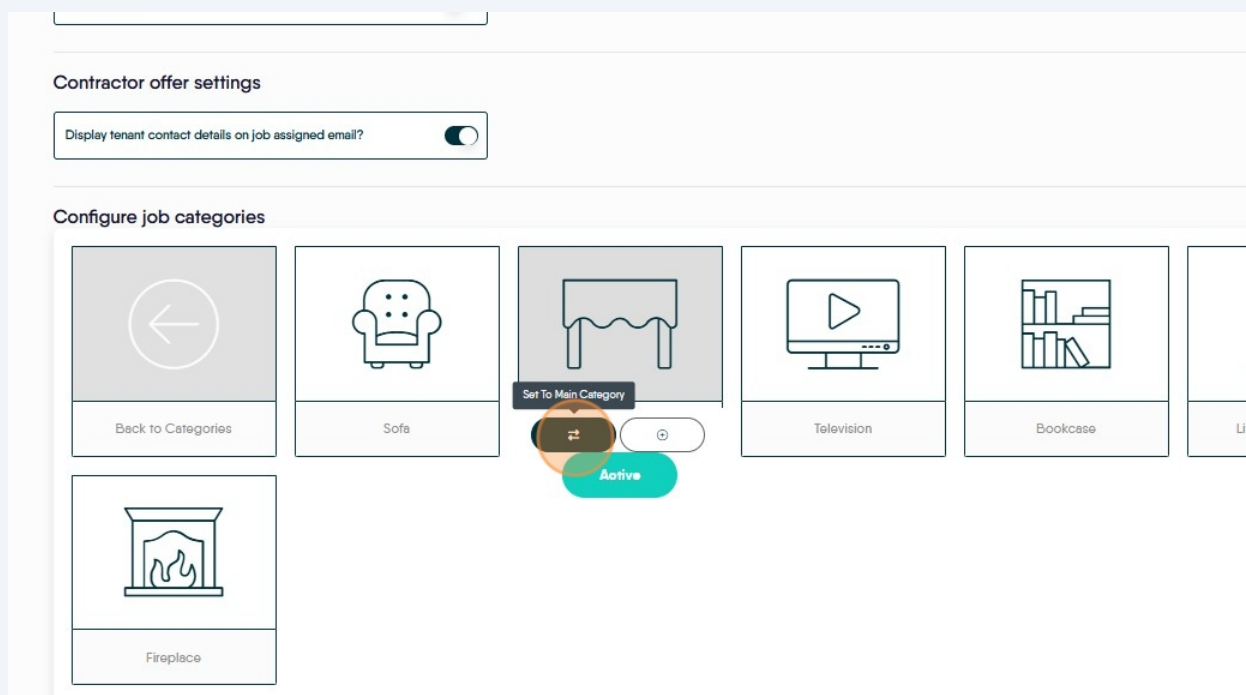
Configure job categories

 6	 0	 0	 0	 0
 Active 4	 10	 11	 6	 0
Alarms	Electrical Fault	Fire	Plumbing, Leak	Locks and Keys
	Kitchen	Bathroom, Toilet	Bedroom	Stairs, Hallway
				Elec

7 Click the arrow button to access the subcategories.



8 Click this button to move a subcategory to the main category list.



9

Click this button if you want to add a warning when this category is selected by the tenant reporting the job.

Contractor offer settings

Display tenant contact details on job assigned email? ☒

Configure job categories

Back to Categories

Sofa

Dining Table

Television

Bookcase

Living Room

Fireplace

10

Enable the prompt and type underneath to add a message to be shown to the tenant.

Add New Warning

Language
English (UK)

Warning

Prompt enabled

Characters Remaining: 400

Video

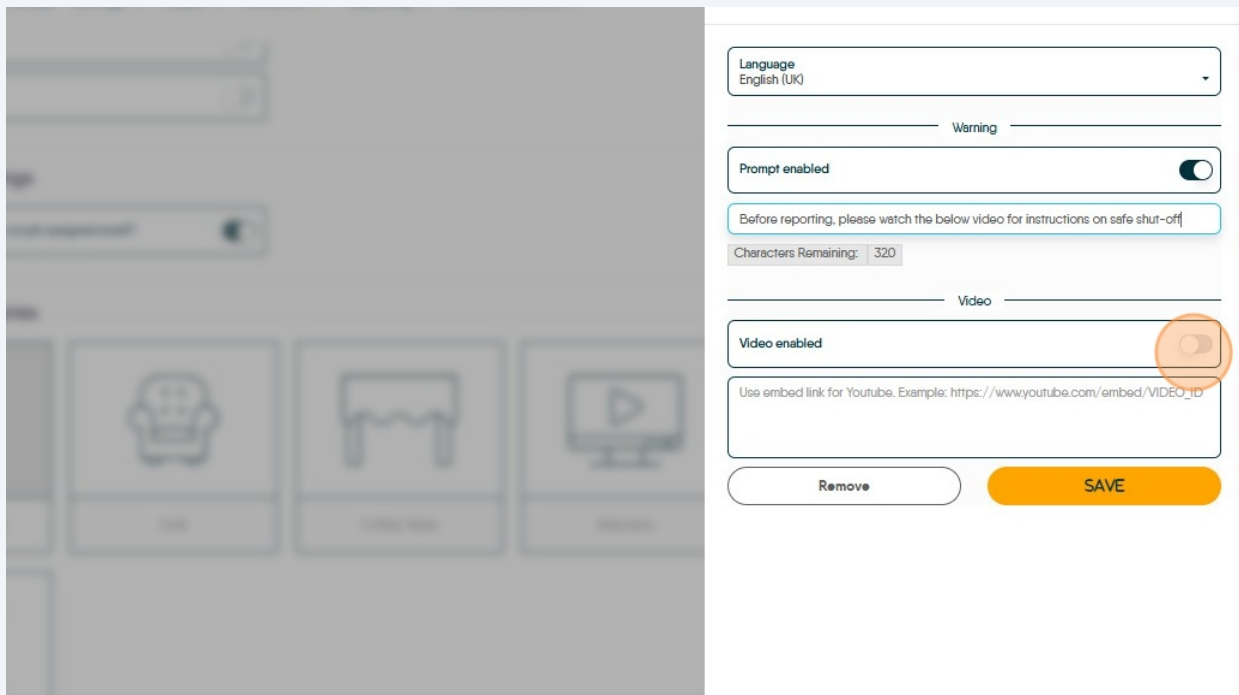
Video enabled

Use embed link for Youtube. Example: https://www.youtube.com/embed/VIDEO_ID

Remove

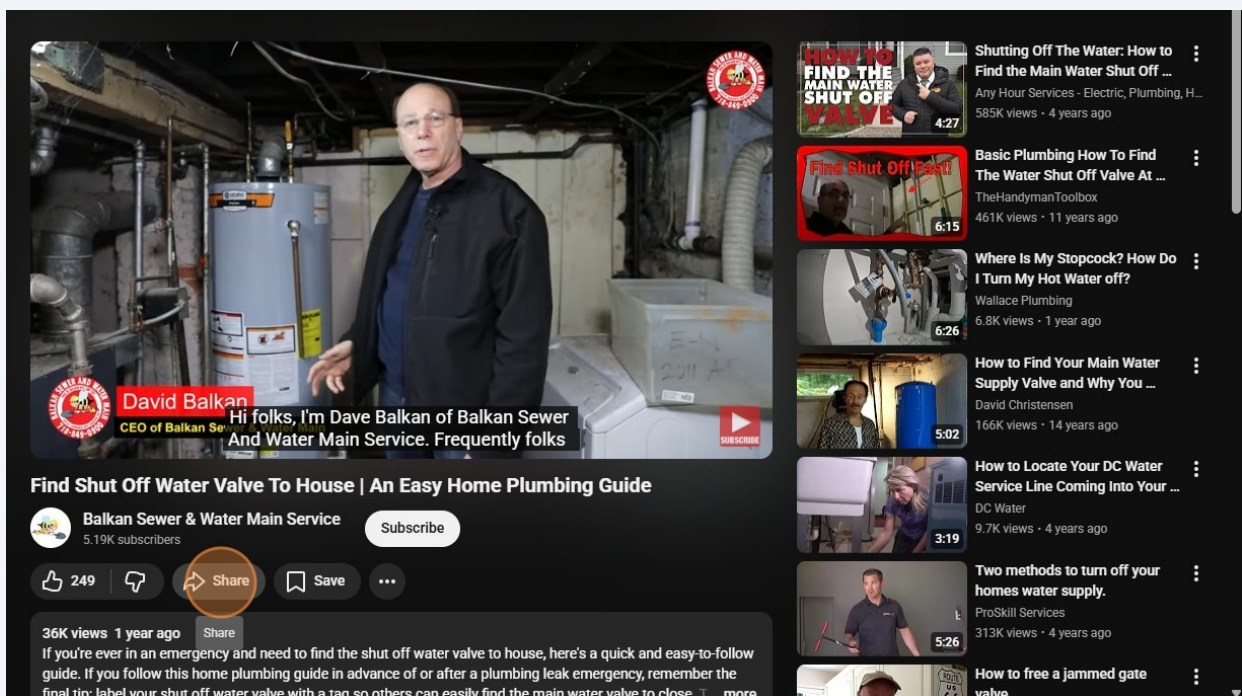
SAVE

11 Enable video to attach something from Youtube



The screenshot shows a form with several sections. At the top, there is a 'Language' dropdown menu set to 'English (UK)'. Below this is a 'Warning' section. The 'Prompt enabled' toggle switch is turned on. A text box contains the instruction: 'Before reporting, please watch the below video for instructions on safe shut-off'. Below the text box, it says 'Characters Remaining: 320'. The 'Video' section has a 'Video enabled' toggle switch, which is highlighted with an orange circle and is currently turned on. Below this, there is a text box with the instruction: 'Use embed link for Youtube. Example: https://www.youtube.com/embed/VIDEO_ID'. At the bottom, there are two buttons: 'Remove' and 'SAVE'.

12 Click "Share" on the video you want to include.



The screenshot shows a YouTube video player. The main video is titled 'Find Shut Off Water Valve To House | An Easy Home Plumbing Guide' by 'Balkan Sewer & Water Main Service'. The video features David Balkan, CEO of Balkan Sewer & Water Main Service, standing in a basement next to a water heater. The video has 36K views and was uploaded 1 year ago. Below the video, there are buttons for 'Like', 'Dislike', 'Share', 'Save', and 'More'. The 'Share' button is highlighted with an orange circle. To the right of the main video, there is a list of recommended videos, including 'Shutting Off The Water: How to Find the Main Water Shut Off ...', 'Basic Plumbing How To Find The Water Shut Off Valve At ...', 'Where Is My Stopcock? How Do I Turn My Hot Water off?', 'How to Find Your Main Water Supply Valve and Why You ...', 'How to Locate Your DC Water Service Line Coming Into Your ...', 'Two methods to turn off your homes water supply.', and 'How to free a jammed gate valve'.

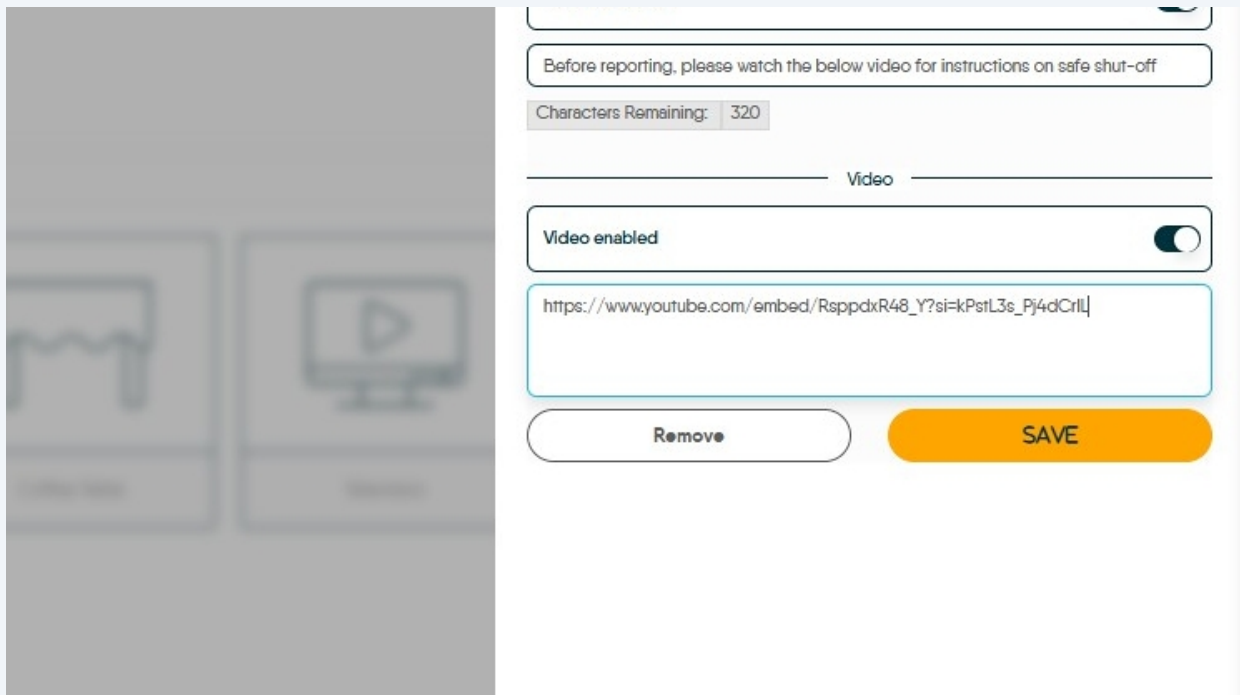
13 Click "Embed"

The screenshot shows a YouTube video player for the video "Find Shut Off Water Valve To House | An Easy Ho...". The video is by "Balkan Sewer & Water Main Service" and has 36K views. A share menu is open over the video, displaying options to share via Embed, WhatsApp, Facebook, X, Email, and Kaka. The embed URL is shown as https://youtu.be/RspdpXR48_Y?feature=shared. The video player shows a man in a black jacket pointing at a water valve in a basement.

14 Select the address between speech marks at the top of the embed code, and copy it.

The screenshot shows the same YouTube video player, but with the "Embed Video" dialog box open. The dialog box displays the embed code for the video. The URL `src="https://www.youtube.com/embed/RspdpXR48_Y?si=kPstL3s_Pj4dCr1l"` is highlighted in blue. The video player shows a man in a black jacket pointing at a water valve in a basement.

15 Paste in the link



Before reporting, please watch the below video for instructions on safe shut-off

Characters Remaining: 320

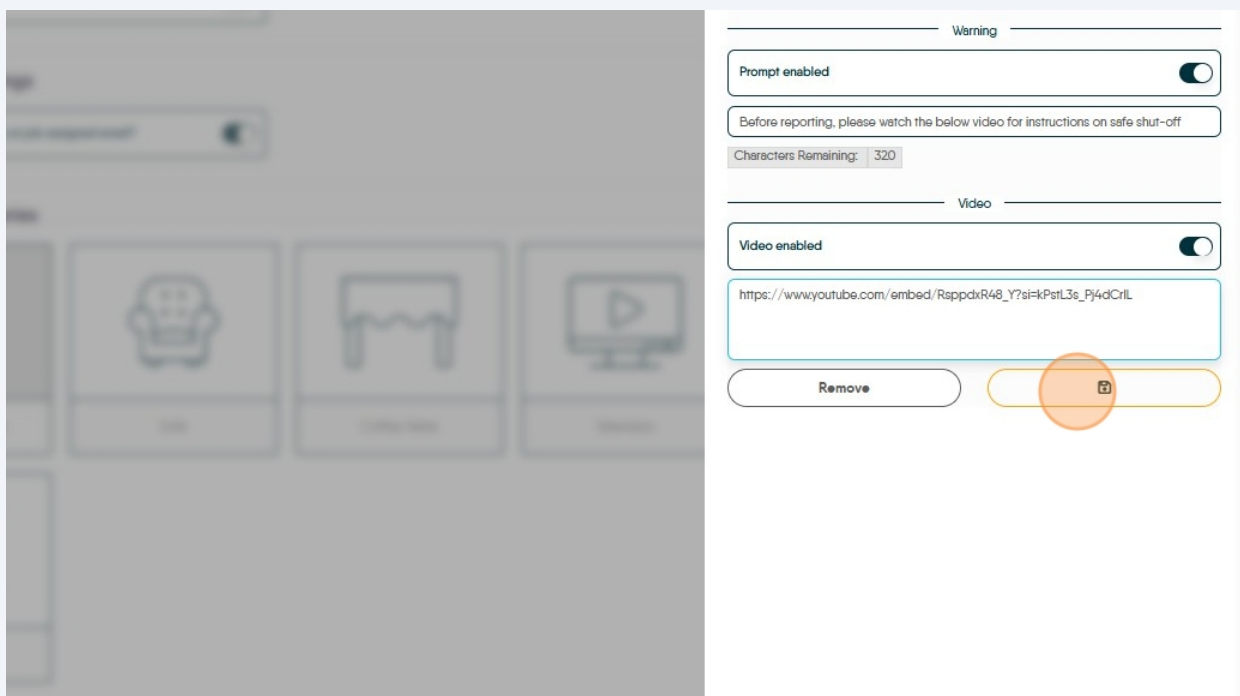
Video

Video enabled ☒

https://www.youtube.com/embed/RspdxR48_Y?si=kPstL3s_Pj4dCrIl

Remove SAVE

16 Click "Save"



Warning

Prompt enabled ☒

Before reporting, please watch the below video for instructions on safe shut-off

Characters Remaining: 320

Video

Video enabled ☒

https://www.youtube.com/embed/RspdxR48_Y?si=kPstL3s_Pj4dCrIl

Remove











- 17 To change the order of job types, click and hold them, then drag them to the new order.

Rent Collect

Contractor offer settings

Display tenant contact details on job assigned email?

Configure job categories

 <div>0</div>	 <div>0</div>	 <div>0</div>	 <div>0</div>	 <div>0</div>	
<div>Active</div>	Fire	Plumbing, Leak	Locks and Keys	Smell Gas	
 <div>19</div>	 <div>11</div>	 <div>6</div>	 <div>6</div>	 <div>0</div>	
Kitchen	Bathroom, Toilet	Living Room	Bedroom	Stairs, Hallway	Elec











- 18 Click here.

Rent Collect

Contractor offer settings

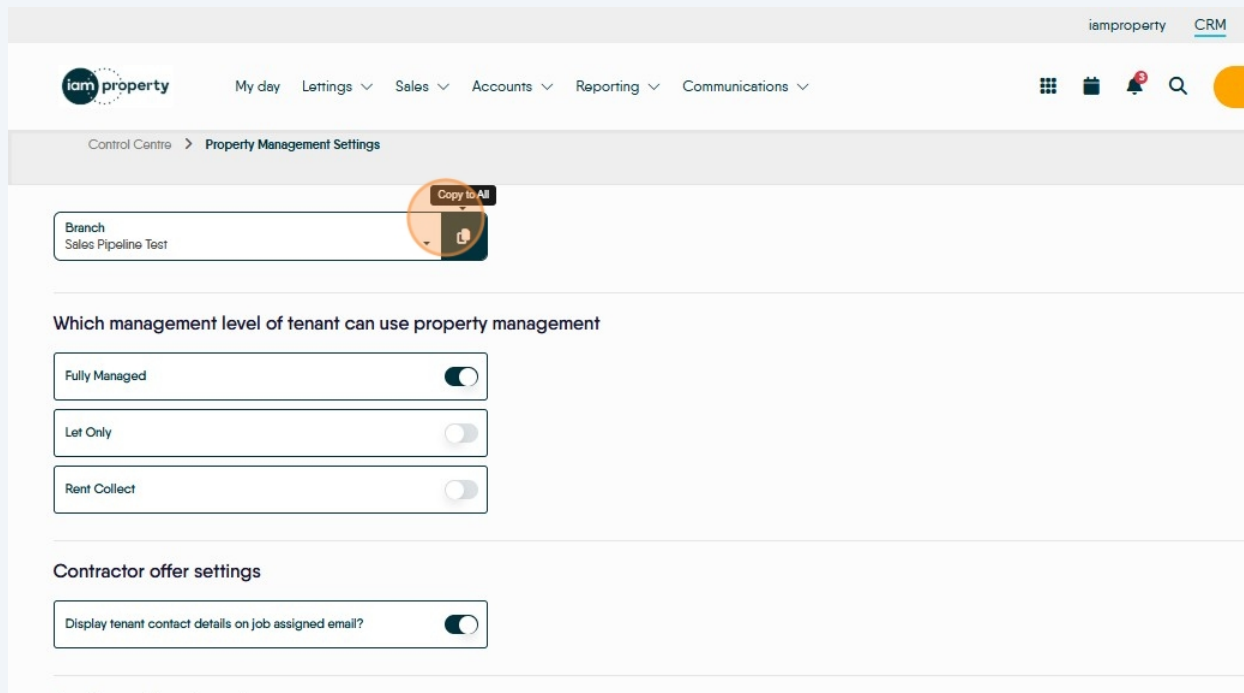
Display tenant contact details on job assigned email?

Configure job categories

 <div>0</div>	 <div>0</div>	 <div>0</div>	 <div>0</div>	 <div>0</div>	
Fire	Plumbing, Leak	<div>Active</div>	Locks and Keys	Smell Gas	
 <div>19</div>	 <div>11</div>	 <div>6</div>	 <div>6</div>	 <div>0</div>	
Kitchen	Bathroom, Toilet	Living Room	Bedroom	Stairs, Hallway	Elec

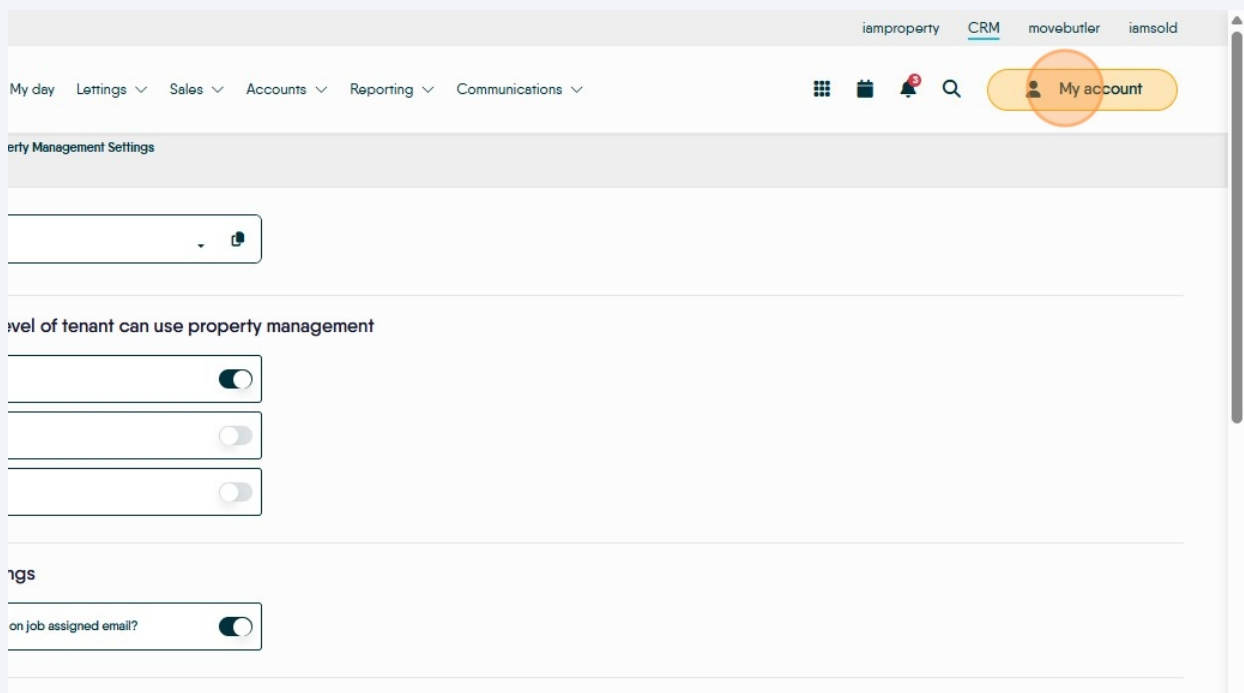
19

These settings are branch-specific, but if you click the button next to the branch dropdown, it will copy these settings to all branches.

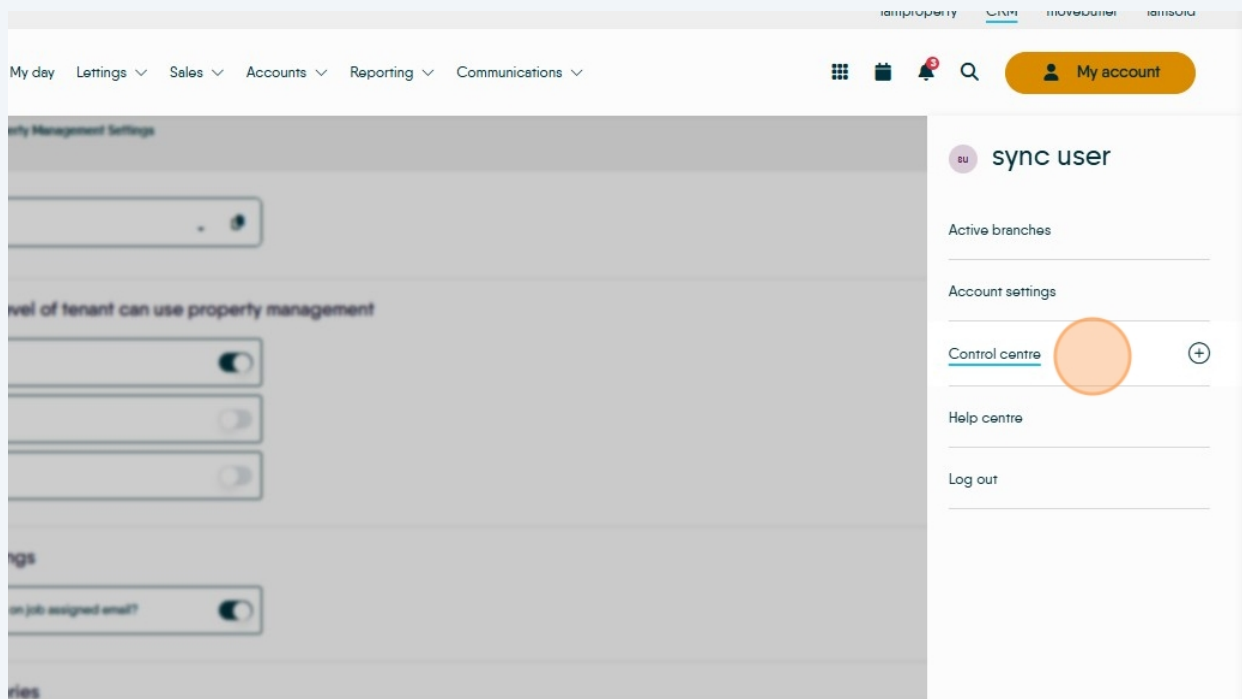


20

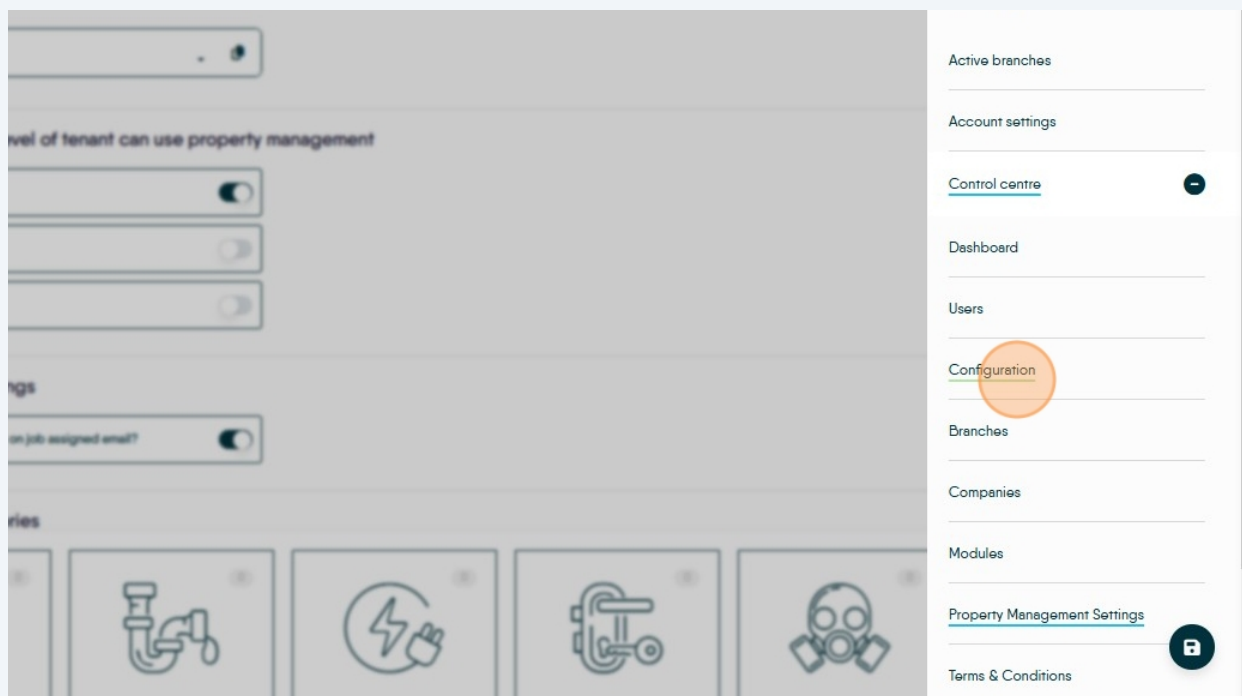
Click "My Account"



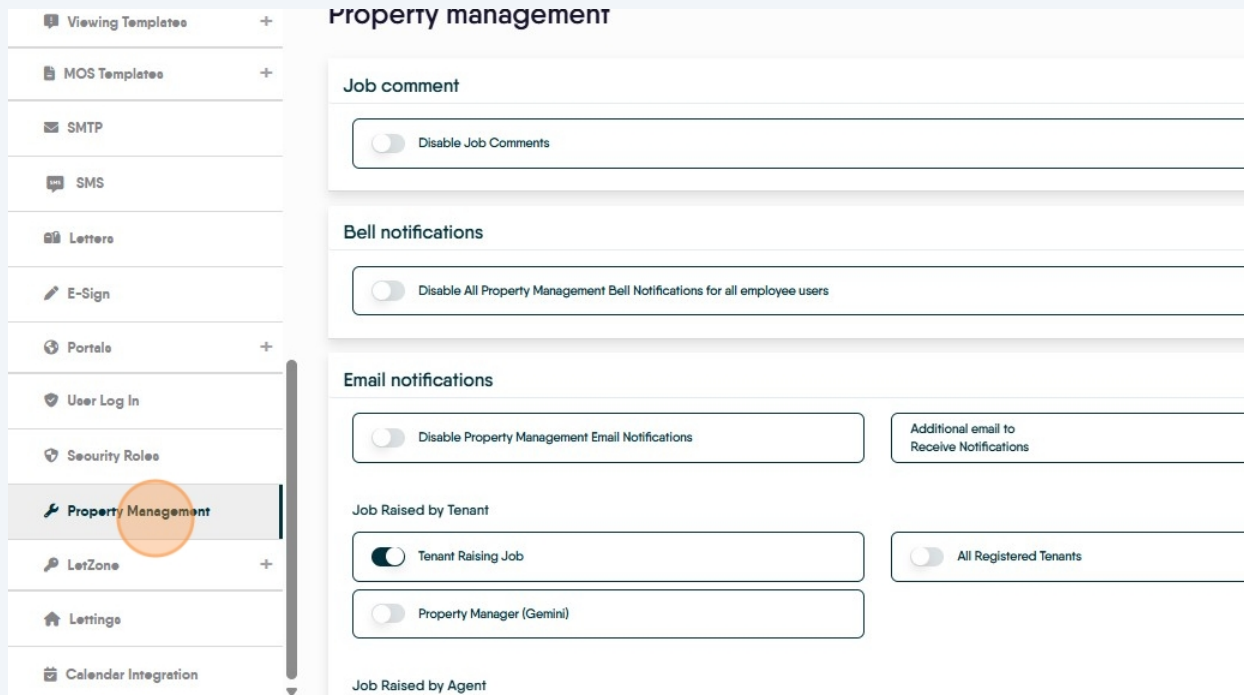
21 Click "Control centre"



22 Click "Configuration"



23 Click "Property Management"



The screenshot shows the 'Property management' configuration page. On the left is a sidebar with various system settings. The 'Property Management' option is highlighted with an orange circle. The main content area is titled 'property management' and contains three sections: 'Job comment', 'Bell notifications', and 'Email notifications'. Each section has a toggle switch to enable or disable the feature. The 'Job comment' section has a toggle for 'Disable Job Comments'. The 'Bell notifications' section has a toggle for 'Disable All Property Management Bell Notifications for all employee users'. The 'Email notifications' section has a toggle for 'Disable Property Management Email Notifications' and a text box for 'Additional email to Receive Notifications'. Below these are two sections for 'Job Raised by Tenant' and 'Job Raised by Agent', each with a toggle for 'Tenant Raising Job' and 'Property Manager (Gemini)'.

Property management

Job comment

☐ Disable Job Comments

Bell notifications

☐ Disable All Property Management Bell Notifications for all employee users

Email notifications

☐ Disable Property Management Email Notifications

Additional email to Receive Notifications

Job Raised by Tenant

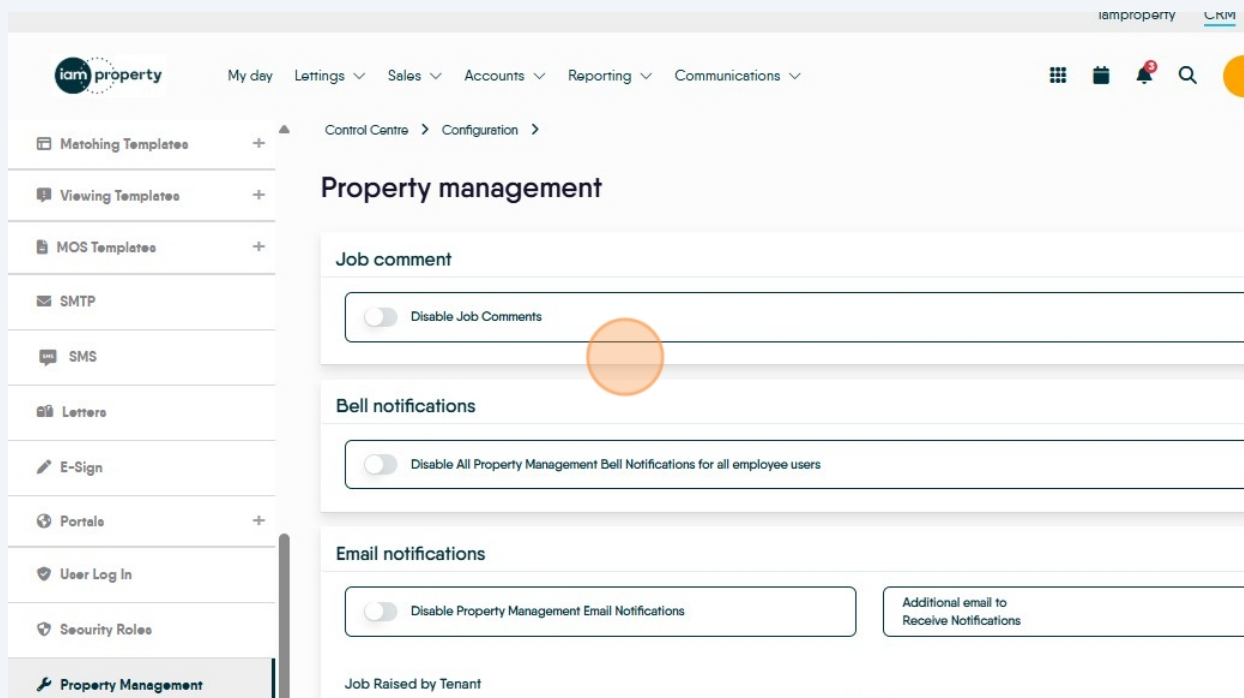
☒ Tenant Raising Job

☐ All Registered Tenants

☐ Property Manager (Gemini)

Job Raised by Agent

24 Click here if you don't want tenants or contractors to be able to add comments within the job.



The screenshot shows the 'Property management' configuration page. The 'Property Management' option is highlighted in the sidebar. The main content area is titled 'Property management' and contains three sections: 'Job comment', 'Bell notifications', and 'Email notifications'. Each section has a toggle switch to enable or disable the feature. The 'Job comment' section has a toggle for 'Disable Job Comments', which is highlighted with an orange circle. The 'Bell notifications' section has a toggle for 'Disable All Property Management Bell Notifications for all employee users'. The 'Email notifications' section has a toggle for 'Disable Property Management Email Notifications' and a text box for 'Additional email to Receive Notifications'. Below these are two sections for 'Job Raised by Tenant' and 'Job Raised by Agent', each with a toggle for 'Tenant Raising Job' and 'Property Manager (Gemini)'.

Property management

Job comment

☒ Disable Job Comments

Bell notifications

☐ Disable All Property Management Bell Notifications for all employee users

Email notifications

☐ Disable Property Management Email Notifications

Additional email to Receive Notifications

Job Raised by Tenant

☒ Tenant Raising Job

☐ All Registered Tenants

☐ Property Manager (Gemini)

Job Raised by Agent

25

Click here if you don't want agents to see bell notifications from jobs. You would use this if you had one particular staff member dealing with all jobs.

Property management

Job comment

☐ Disable Job Comments

Bell notifications

☐ Disable All Property Management Bell Notifications for all employee users

Email notifications

☐ Disable Property Management Email Notifications

Additional email to Receive Notifications

Job Raised by Tenant

☒ Tenant Raising Job

☐ All Registered Tenants

☐ Property Manager (Gemini)

26

Here you can add the email address of any other member of staff that should receive emails related to tasks.

Job comment

☐ Disable Job Comments

Bell notifications

☐ Disable All Property Management Bell Notifications for all employee users

Email notifications

☐ Disable Property Management Email Notifications

Additional email to Receive Notifications

Job Raised by Tenant

☒ Tenant Raising Job

☐ All Registered Tenants

☐ Property Manager (Gemini)

Job Raised by Agent

☒ Agent Raising Job

☐ All Registered Tenants

27 Here you can control who is emailed when a tenant or an agent raises a job.

Management

Email notifications

☐ Disable Property Management Email Notifications

Additional email to Receive Notifications

Job Raised by Tenant

☒ Tenant Raising Job

☐ All Registered Tenants

☐ Property Manager (Gemini)

Job Raised by Agent

☒ Agent Raising Job

☐ All Registered Tenants

☐ Property Manager (Gemini)

☒ Tenant Reporting Job

Job contractor filtering default (company wide)

☒ All Branches Default branch filter for assigning contractors to jobs

28 Here you can control if, when assigning jobs, all contractors are shown or only contractors set to cover the property's branch.

Property Management

Email notifications

☐ Disable Property Management Email Notifications

Additional email to Receive Notifications

Job Raised by Tenant

☒ Tenant Raising Job

☐ All Registered Tenants

☐ Property Manager (Gemini)

Job Raised by Agent

☒ Agent Raising Job

☐ All Registered Tenants

☐ Property Manager (Gemini)

☒ Tenant Reporting Job

Job contractor filtering default (company wide)

☒ All Branches Default branch filter for assigning contractors to jobs

Priority settings

29 If you want to set different priority levels for jobs, click Add at the bottom.

The screenshot shows a settings interface with a sidebar on the left containing expandable sections marked with '+' and '-'. The main content area includes:

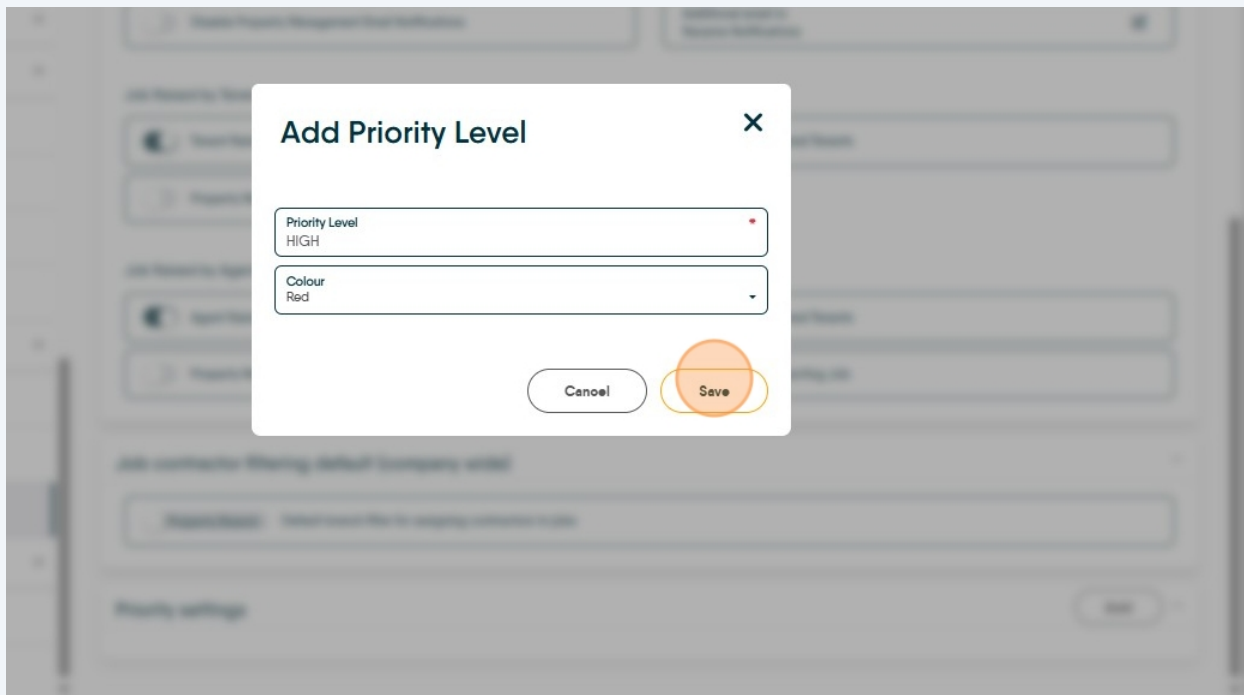
- Disable Property Management Email Notifications:** A toggle switch.
- Additional email to Receive Notifications:** A text input field with an edit icon.
- Job Raised by Tenant:**
 - Tenant Raising Job:** A toggle switch.
 - Property Manager (Gemini):** A toggle switch.
 - All Registered Tenants:** A toggle switch.
- Job Raised by Agent:**
 - Agent Raising Job:** A toggle switch.
 - Property Manager (Gemini):** A toggle switch.
 - All Registered Tenants:** A toggle switch.
 - Tenant Reporting Job:** A toggle switch.
- Job contractor filtering default (company wide):** A section header with an expand/collapse arrow.
 - Property Branch:** A dropdown menu with the text "Default branch filter for assigning contractors to jobs".
- Priority settings:** A section header with an expand/collapse arrow and an **Add** button.

30 Add a name for the priority level, and a colour for it to appear in.

The screenshot shows a modal window titled "Add Priority Level" with a close button (X) in the top right corner. The form contains:

- Priority Level:** A text input field with the placeholder text "Please enter priority level name".
- Colour:** A dropdown menu with the placeholder text "Please select priority level colour".
- Buttons:** "Cancel" and "Save" buttons at the bottom.

31 Click "Save"



32 The priority levels will then display when creating jobs within the system.

