

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.



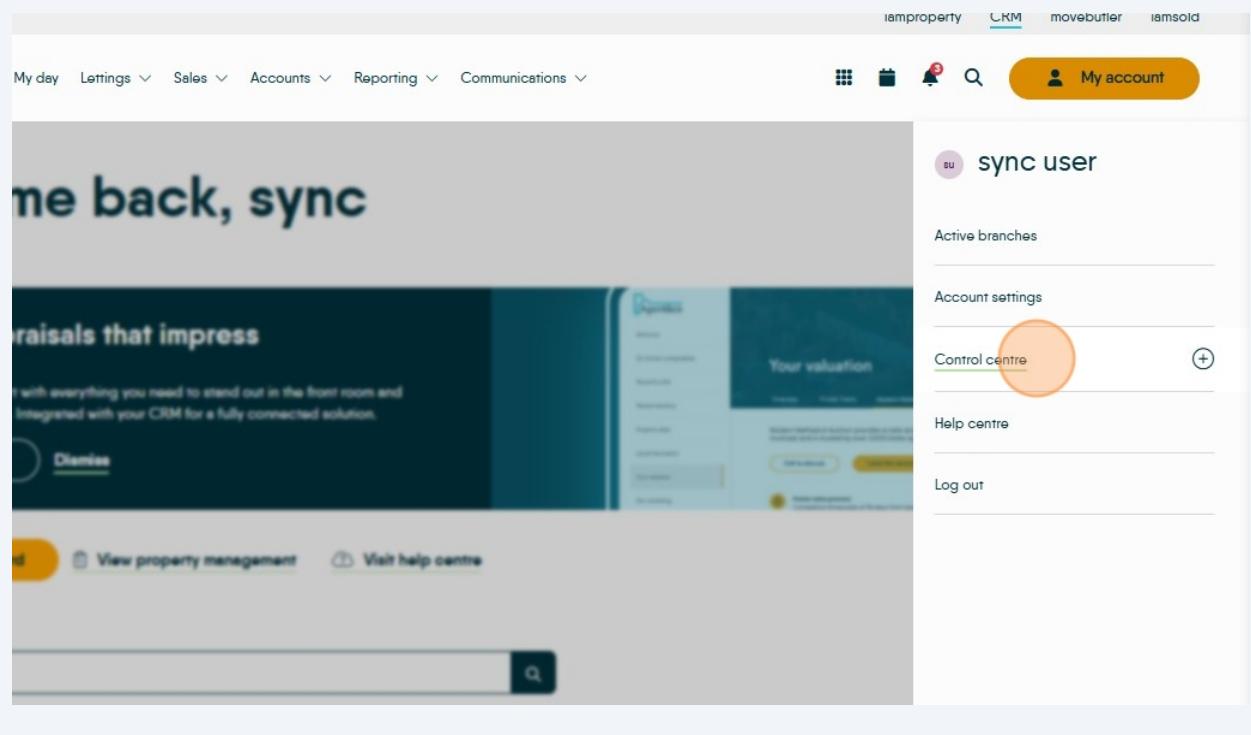
Property Management Settings are divided into two sections. One covers the tenant-facing side that they will see when reporting an issue, one covers the side you as the agent will see. Jump to step 20 if you need the agent side.

1

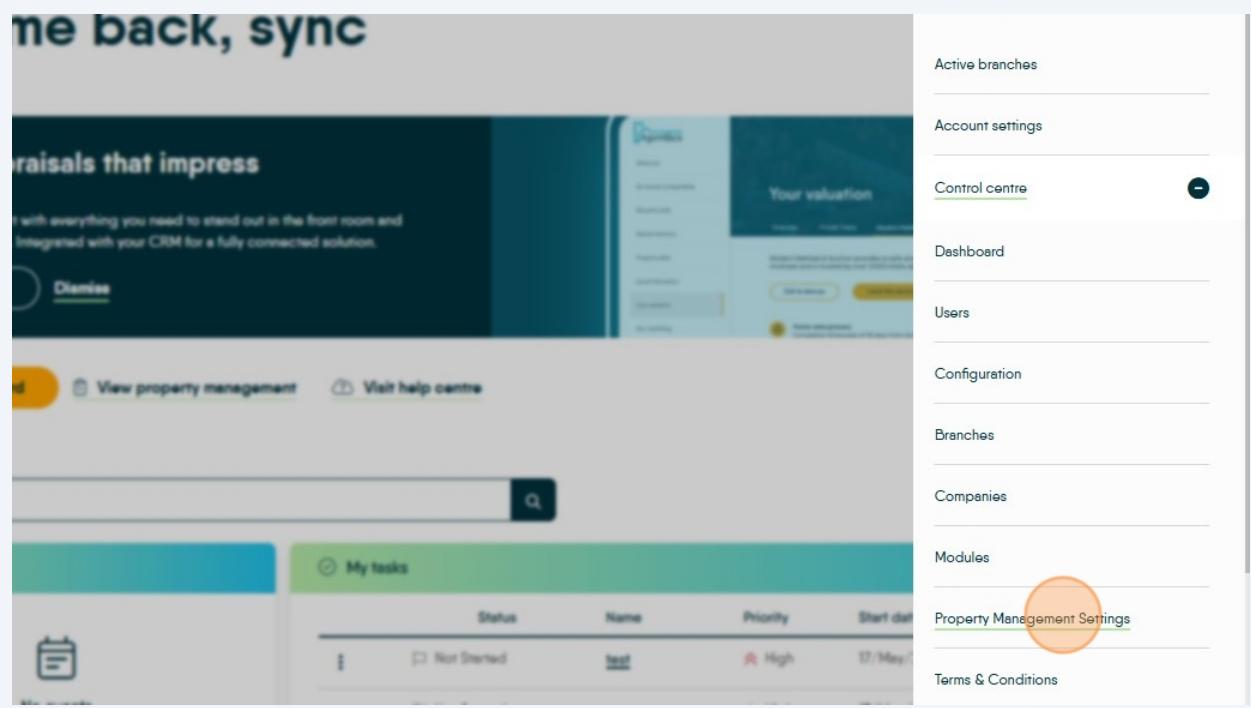
Click "My Account"

The screenshot shows the top navigation bar of the CRM system. The 'My account' button is highlighted with an orange circle. Below the navigation bar, there is a large banner with the text 'Move back, sync' and 'Appraisals that impress'. The banner also mentions 'With everything you need to stand out in the front room and Integrated with your CRM for a fully connected solution.' At the bottom of the banner, there are two buttons: 'View property management' and 'Visit help centre'. The main content area of the page is visible, showing various sections like 'Your valuation', 'Overview', 'Private Treaty', and 'Modern Method of Auction'.

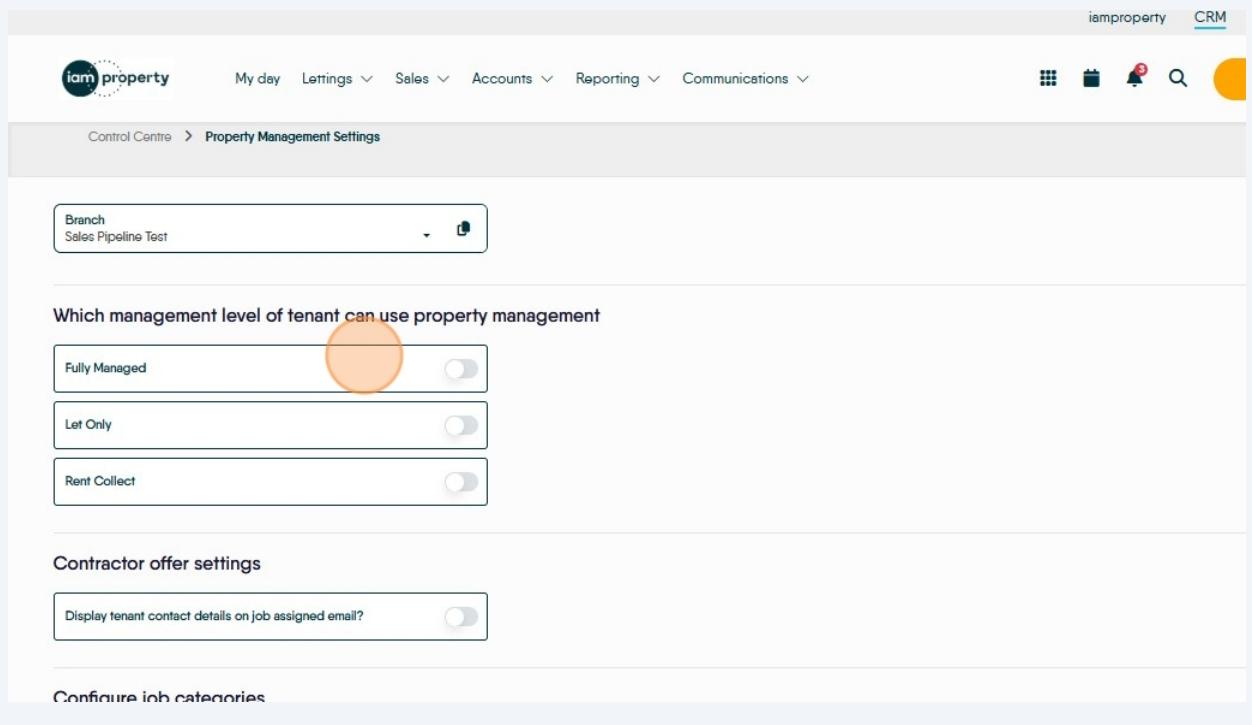
2 Click "Control centre"



3 Click "Property Management Settings"



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



Control Centre > Property Management Settings

Branch
Sales Pipeline Test

Which management level of tenant can use property management

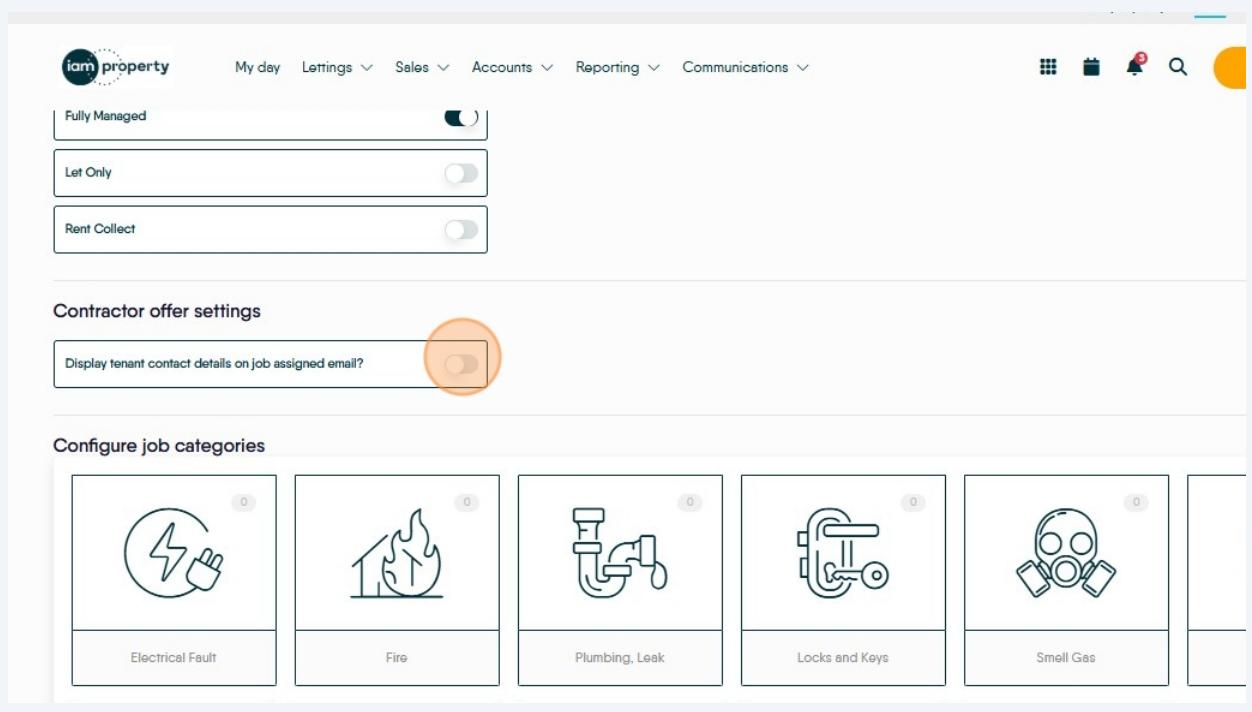
- Fully Managed
- Let Only
- Rent Collect

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.



My day Lettings Sales Accounts Reporting Communications

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	
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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.

The screenshot shows the 'Configure job categories' section of the iam property CRM. The interface includes a navigation bar with 'My day', 'Lettings', 'Sales', 'Accounts', 'Reporting', 'Communications', and a toggle for 'Display tenant contact details on job assigned email?'. Below this is a section titled 'Configure job categories' with a grid of job categories. Each category card has a small number in the top right corner indicating the count of subcategories. The categories are:

Category	Subcategory Count
Alarms	4
Electrical Fault	0
Fire	0
Plumbing, Leak	0
Locks and Keys	0
Kitchen	19
Bathroom, Toilet	11
Bedroom	6
Stairs, Hallway	0
Elec	0

Each category card contains an icon representing the job type, a 'Active' button, and a bell icon with a number indicating unread notifications. The 'Alarms' category has a red circle around the number 4, and the 'Kitchen' category has a red circle around the number 19.

7 Click the arrow button to access the subcategories.

Display tenant contact details on job assigned email?

Configure job categories

Access Category	Electrical Fault	Fire	Plumbing, Leak	Locks and Keys
Alarms	Kitchen	Bathroom, Toilet	Bedroom	Stairs, Hallway
0	19	11	6	0
0	1	21	0	1

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

Display tenant contact details on job assigned email?

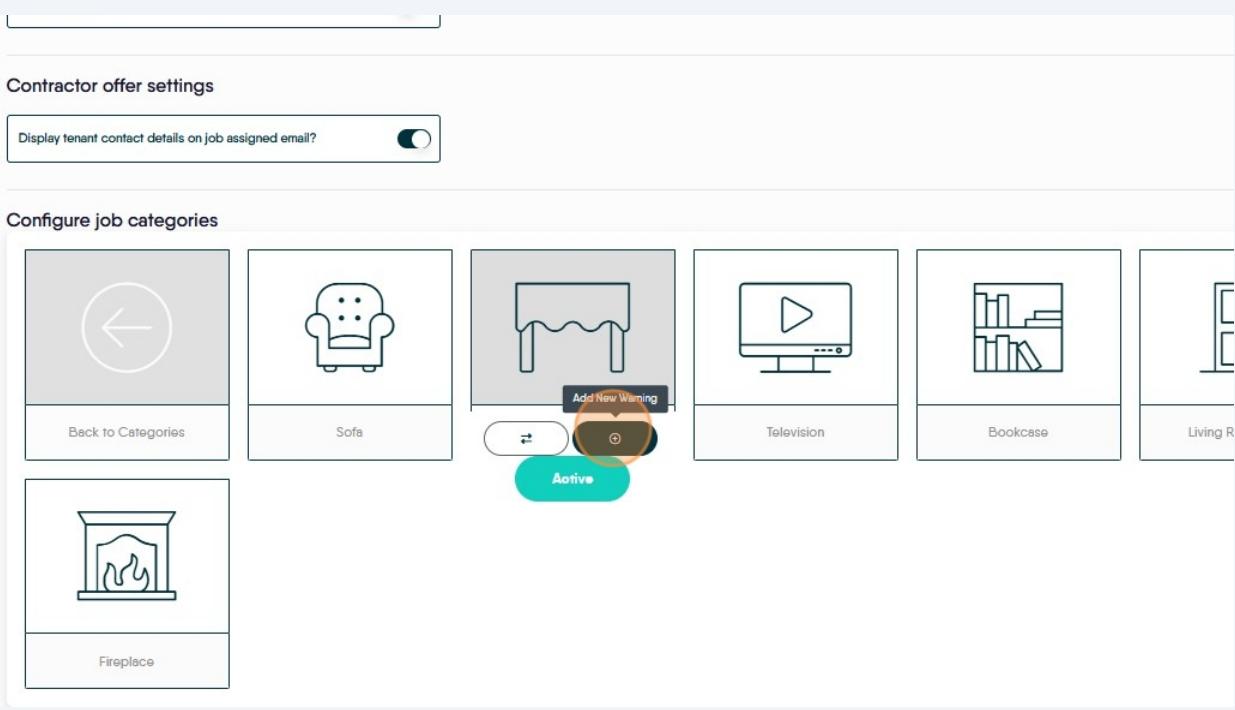
Contractor offer settings

Configure job categories

Back to Categories	Sofa	Set To Main Category	Television	Bookcase
0	0	0	0	0
0	1	0	1	1

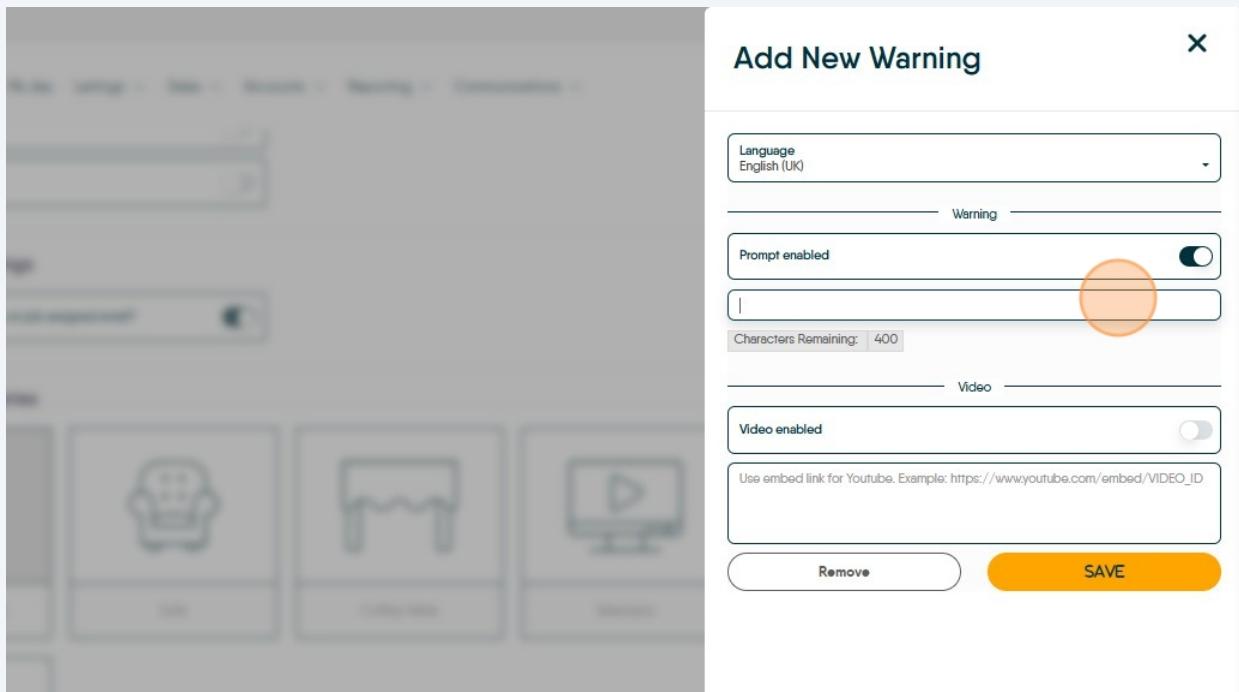
9

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

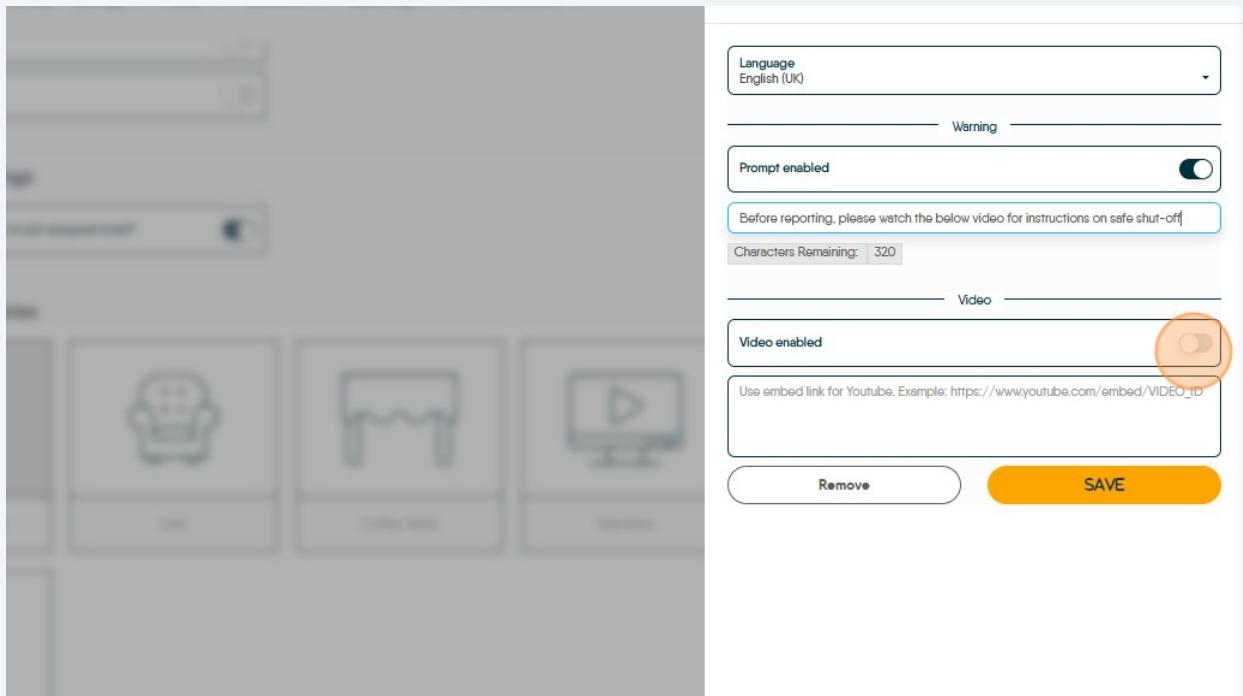


10

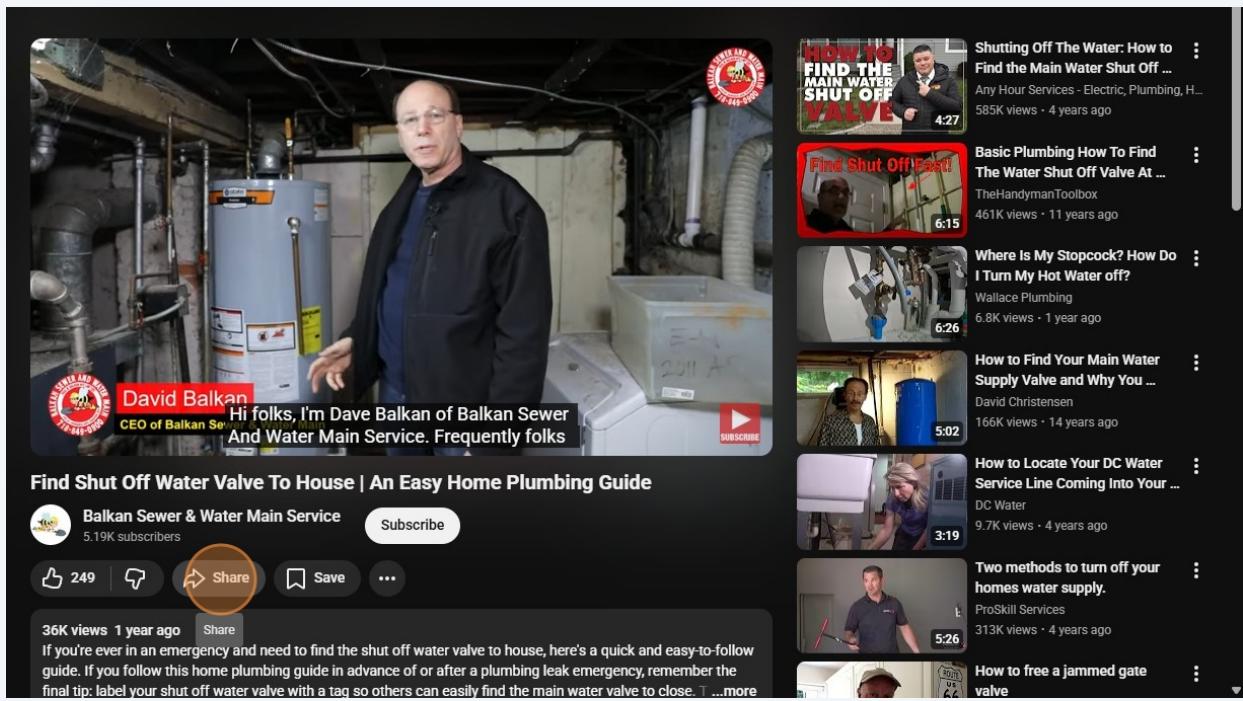
Enable the prompt and type underneath to add a message to be shown to the tenant.



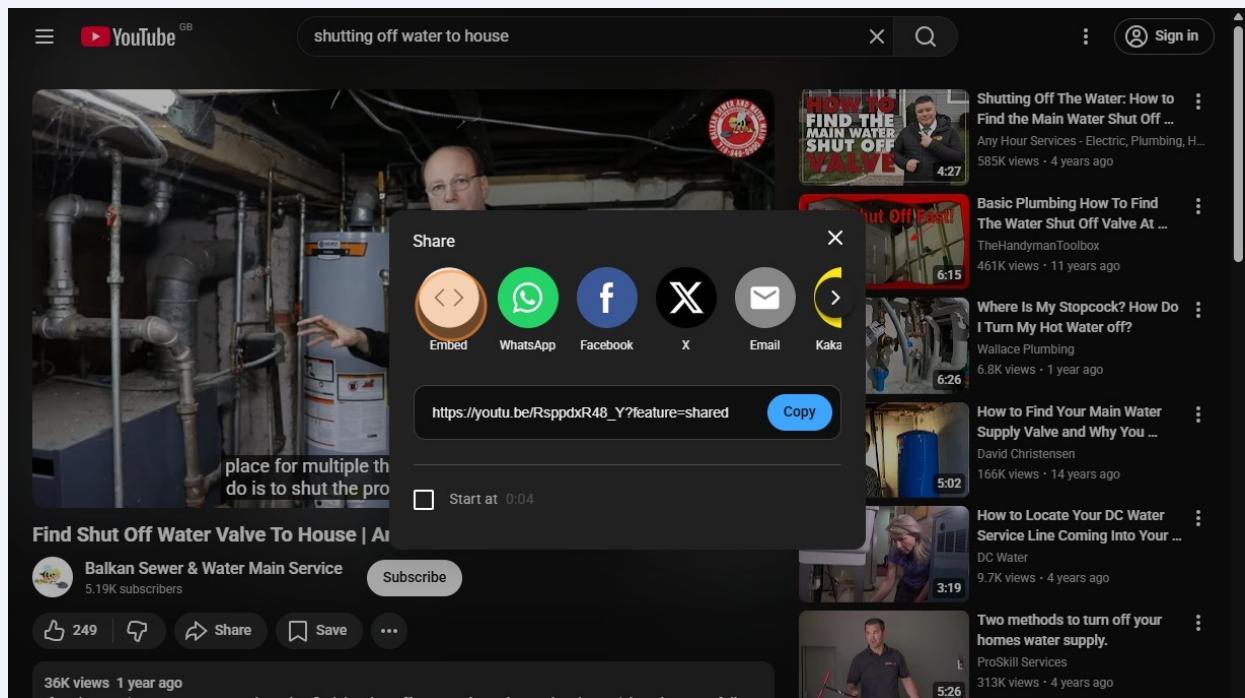
11 Enable video to attach something from Youtube



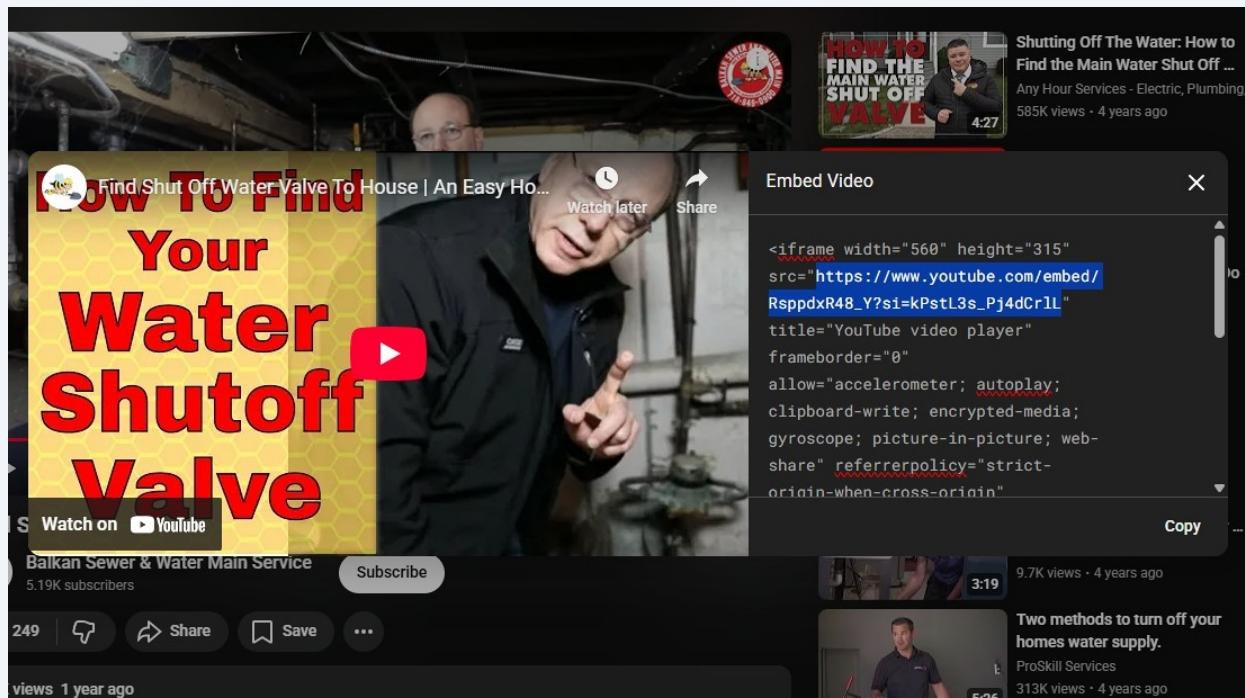
12 Click "Share" on the video you want to include.



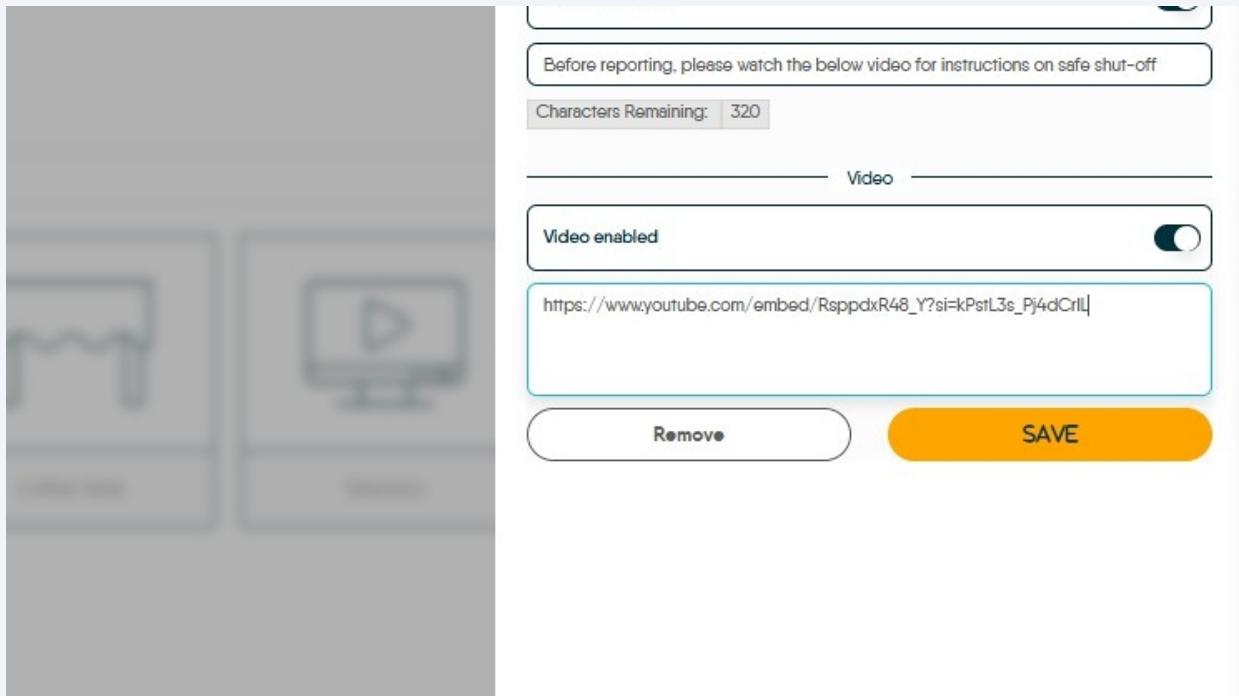
13 Click "Embed"



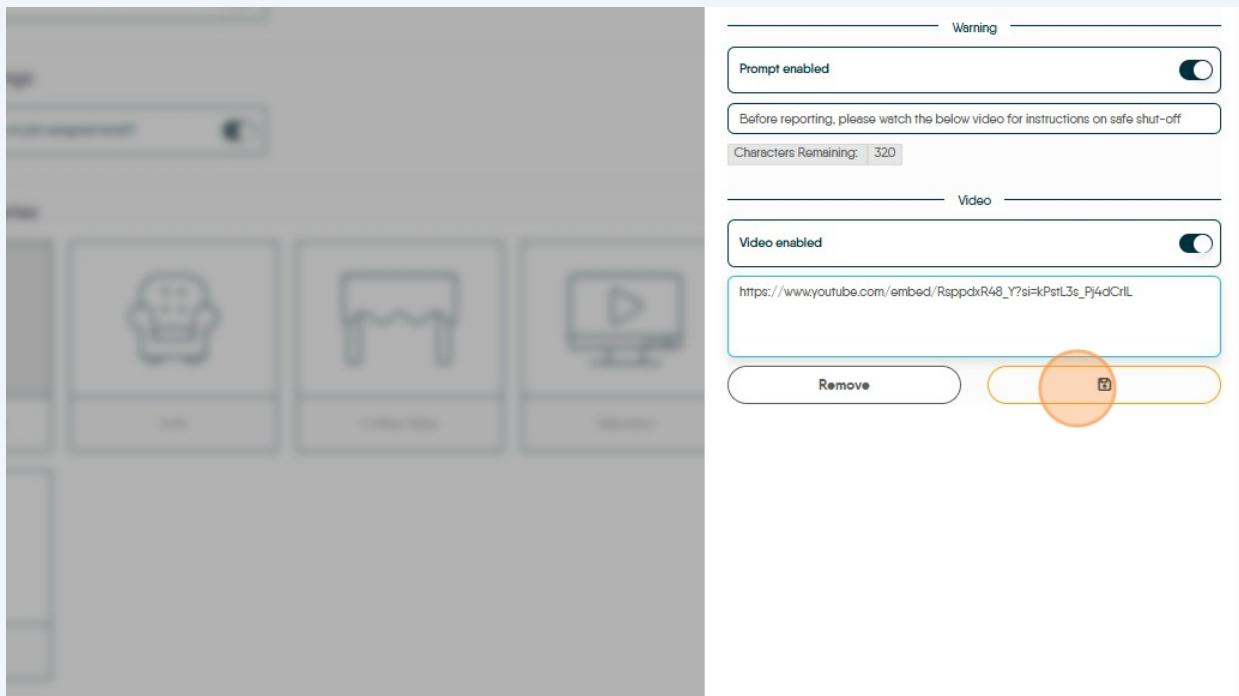
14 Select the address between speech marks at the top of the embed code, and copy it.



15 Paste in the link



16 Click "Save"



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



Active



Kitchen



Fire



Plumbing, Leak



Locks and Keys



Smell Gas



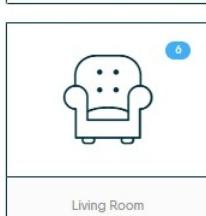
Active



Kitchen



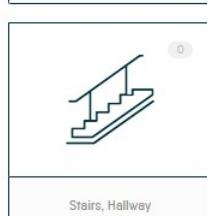
Bathroom, Toilet



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



Fire



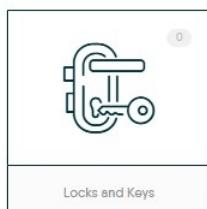
Plumbing, Leak



Active



Kitchen



Locks and Keys



Smell Gas



Active



Kitchen



Bathroom, Toilet



Living Room



Bedroom

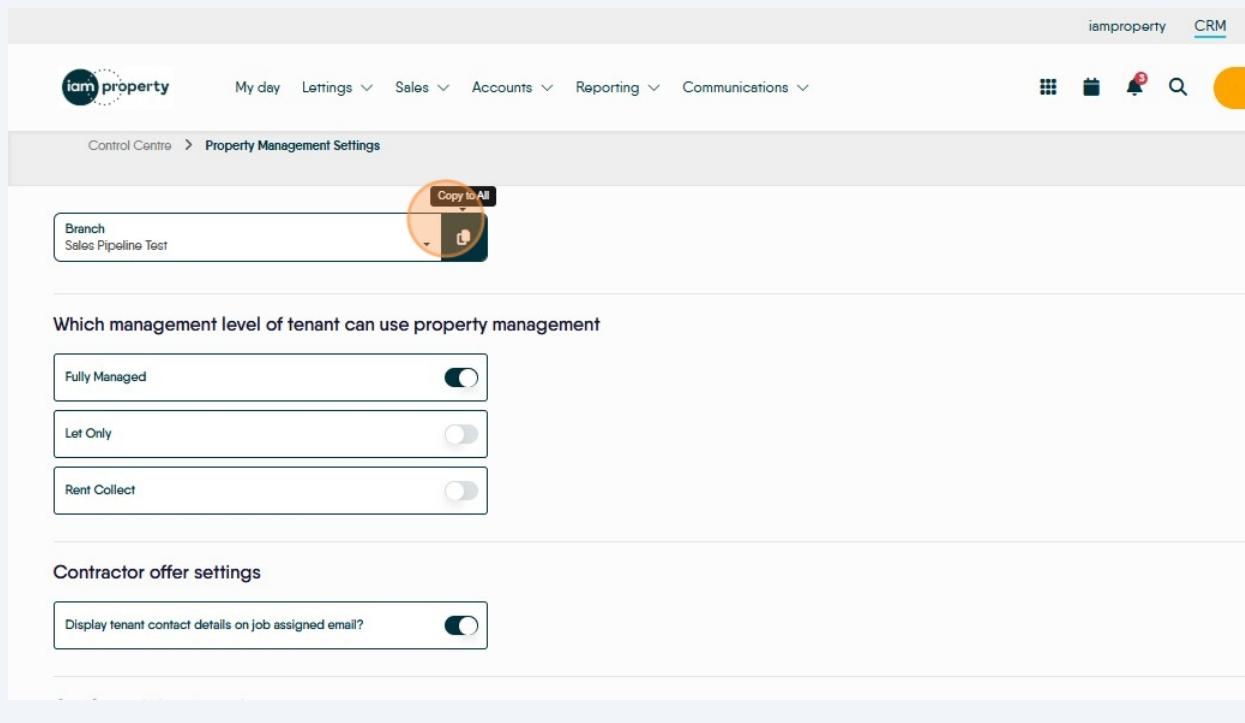


Stairs, Hallway



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.



Control Centre > Property Management Settings

Branch: Sales Pipeline Test

Copy to All

Which management level of tenant can use property management

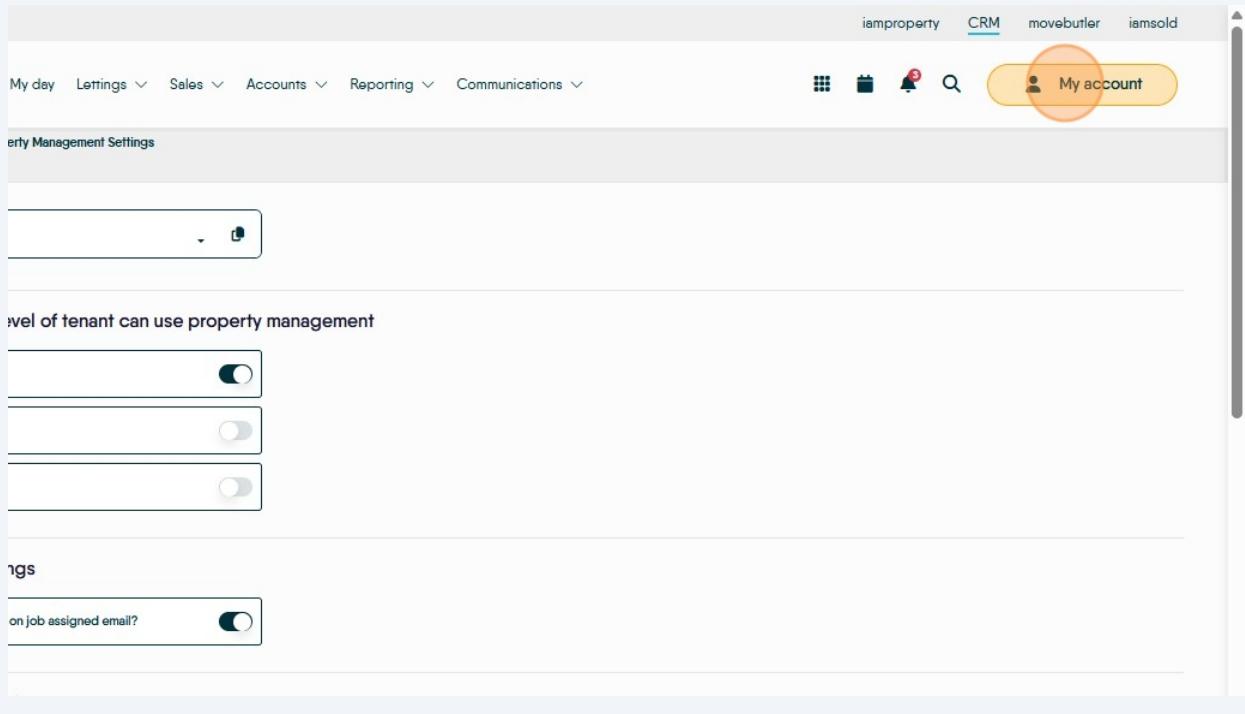
- Fully Managed
- Let Only
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Contractor offer settings

Display tenant contact details on job assigned email?

20

Click "My Account"



My day Lettings Sales Accounts Reporting Communications

My account

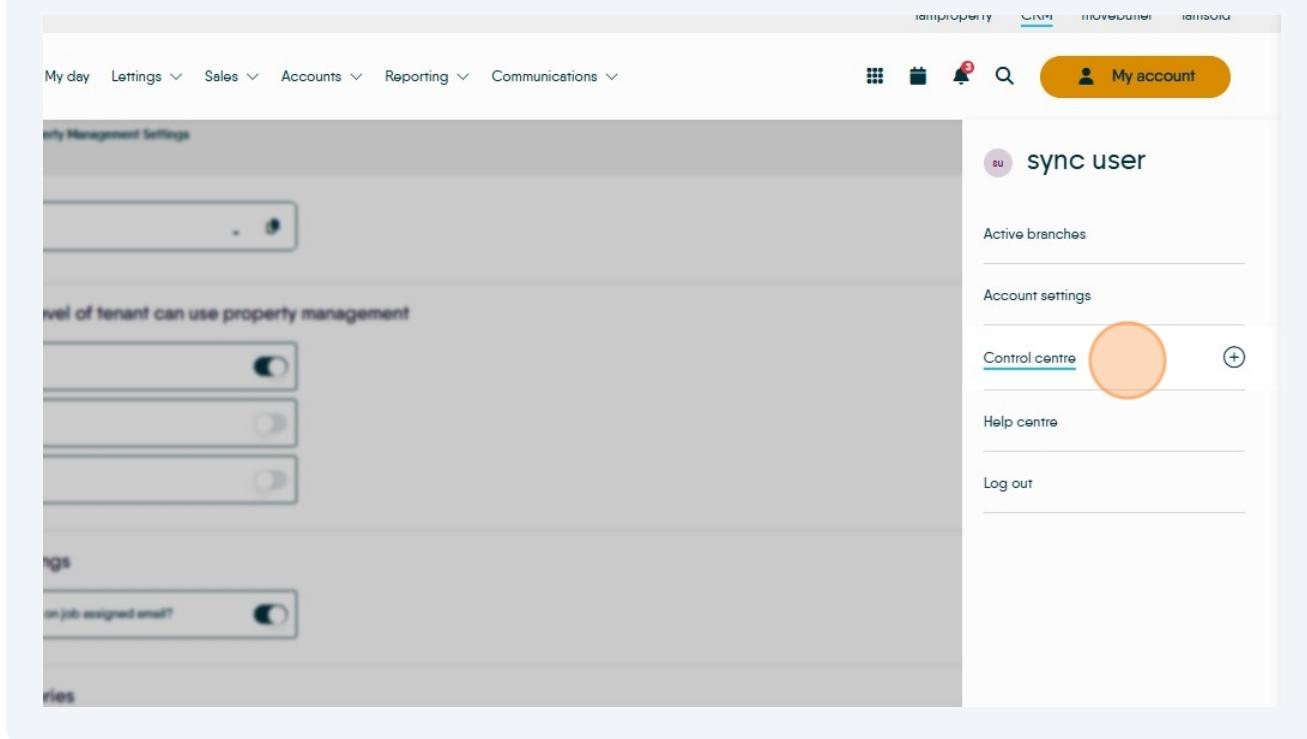
Which management level of tenant can use property management

-
-
-

Contractor offer settings

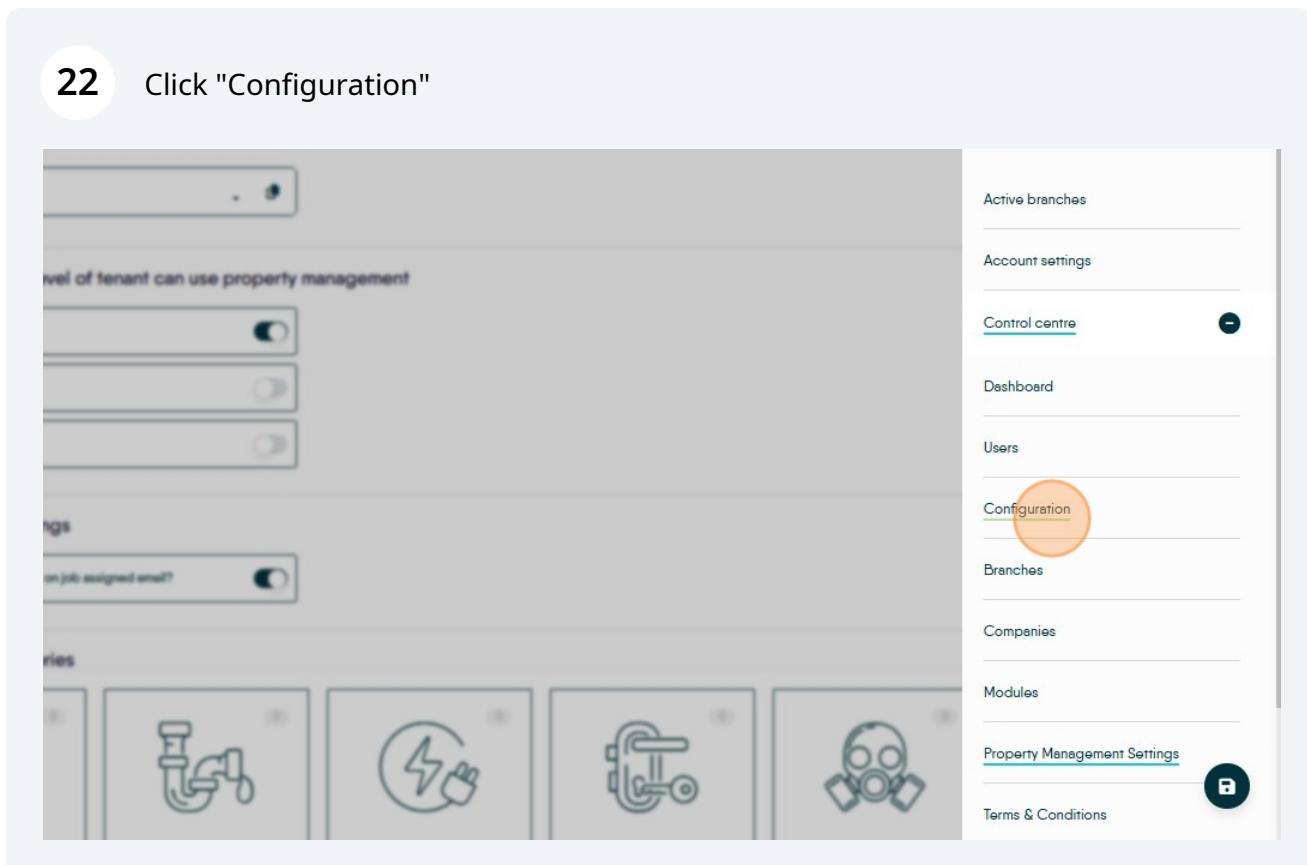
Display tenant contact details on job assigned email?

21 Click "Control centre"



The screenshot shows the software's navigation bar with 'Control centre' highlighted. The main content area displays 'Property Management Settings' and a 'sync user' section. On the right, there is a sidebar with the following options: 'Active branches', 'Account settings' (with 'Control centre' highlighted and circled in orange), 'Help centre', and 'Log out'. Below the sidebar, there is a 'Control centre' section with a list of items: 'Dashboard', 'Users', 'Configuration' (highlighted and circled in orange), 'Branches', 'Companies', 'Modules', 'Property Management Settings', and 'Terms & Conditions'.

22 Click "Configuration"



The screenshot shows the software's navigation bar with 'Control centre' highlighted. The main content area displays 'Property Management Settings' and a 'sync user' section. On the right, there is a sidebar with the following options: 'Active branches', 'Account settings', 'Control centre' (highlighted and circled in orange), 'Dashboard', 'Users', 'Configuration' (highlighted and circled in orange), 'Branches', 'Companies', 'Modules', 'Property Management Settings', and 'Terms & Conditions'.

23 Click "Property Management"

Viewing Templates

MOS Templates

SMTP

SMS

Letters

E-Sign

Portals

User Log In

Security Roles

Property Management

LetZone

Lettings

Calendar Integration

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.

Matching Templates

Viewing Templates

MOS Templates

SMTP

SMS

Letters

E-Sign

Portals

User Log In

Security Roles

Property Management

Control Centre > Configuration >

Property management

Job comment

Disable Job Comments

Bell notifications

Disable All Property Management Bell Notifications for all employee users

Email notifications

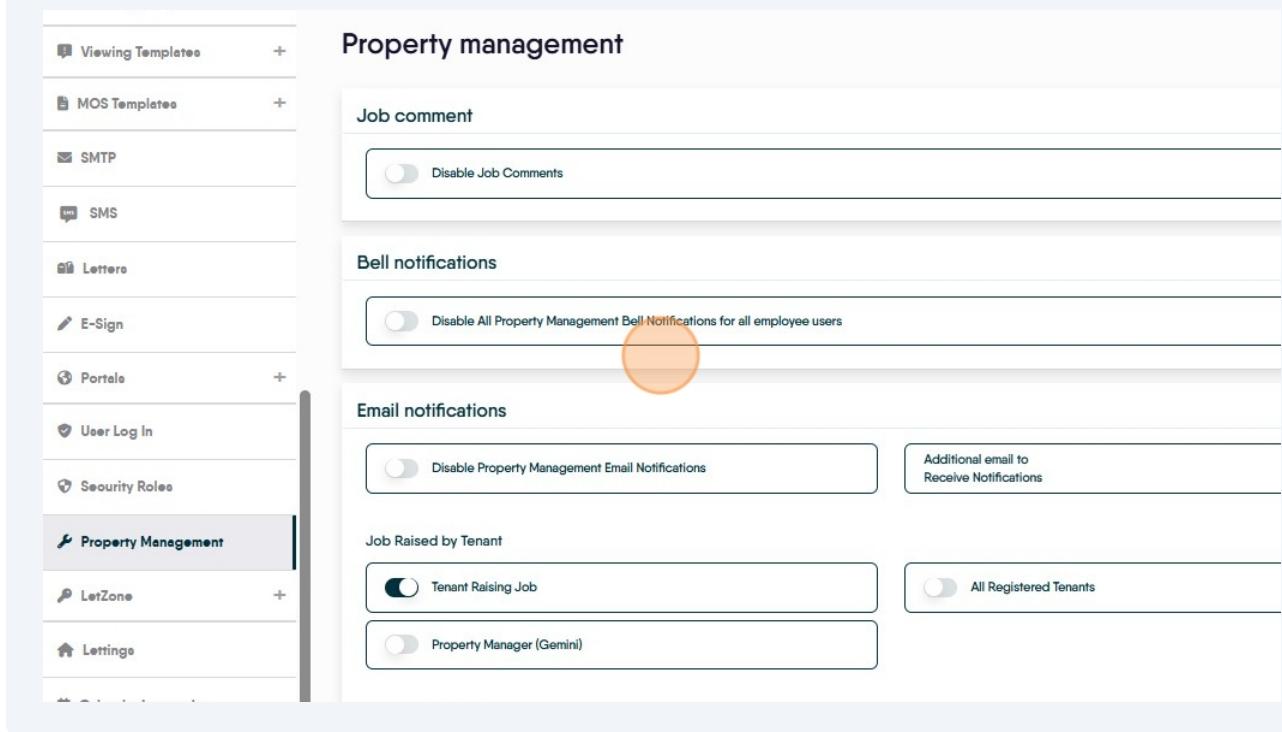
Disable Property Management Email Notifications

Additional email to Receive Notifications

Job Raised by Tenant

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

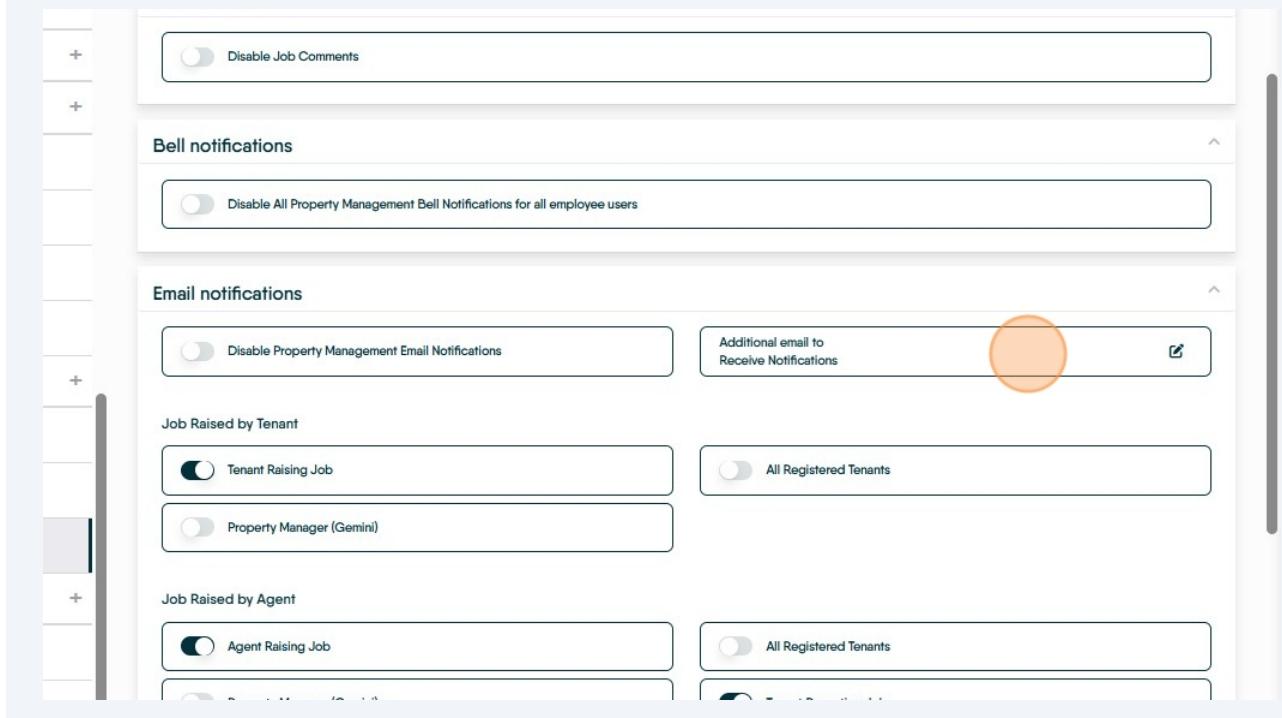
Tenant Raising Job

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.



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)

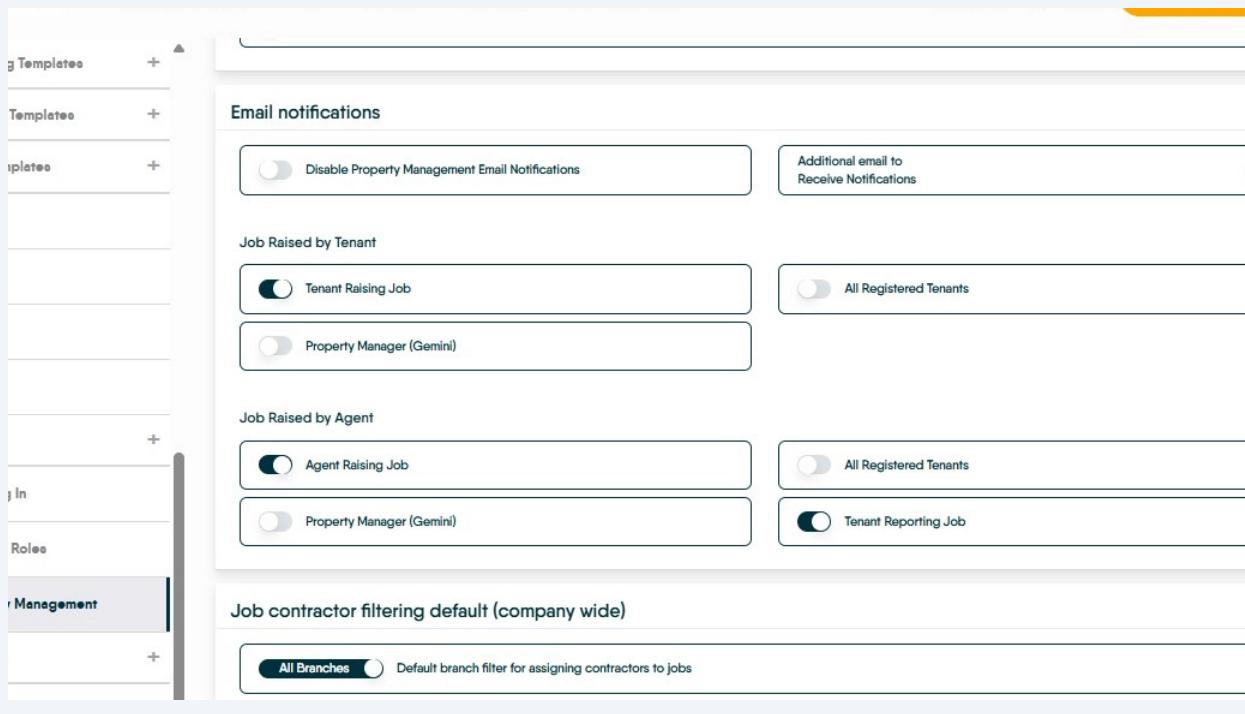
Job Raised by Agent

Agent Raising Job

All Registered Tenants

27

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



Templates

Email notifications

Disable Property Management Email Notifications

Additional email to Receive Notifications

Job Raised by Tenant

Tenant Raising Job

Property Manager (Gemini)

All Registered Tenants

Job Raised by Agent

Agent Raising Job

Property Manager (Gemini)

All Registered Tenants

Tenant Reporting Job

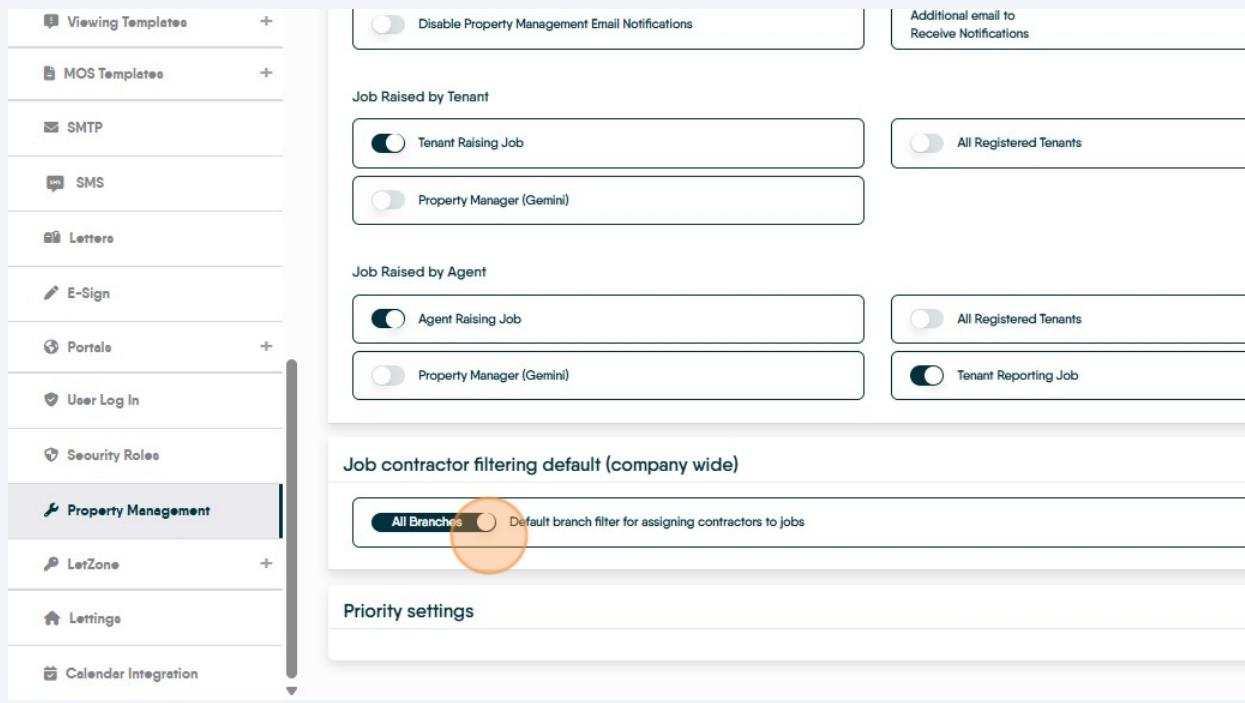
Job contractor filtering default (company wide)

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.



Viewing Templates

MOS Templates

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Job Raised by Tenant

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All Registered Tenants

Job Raised by Agent

Agent Raising Job

Property Manager (Gemini)

All Registered Tenants

Tenant Reporting Job

Job contractor filtering default (company wide)

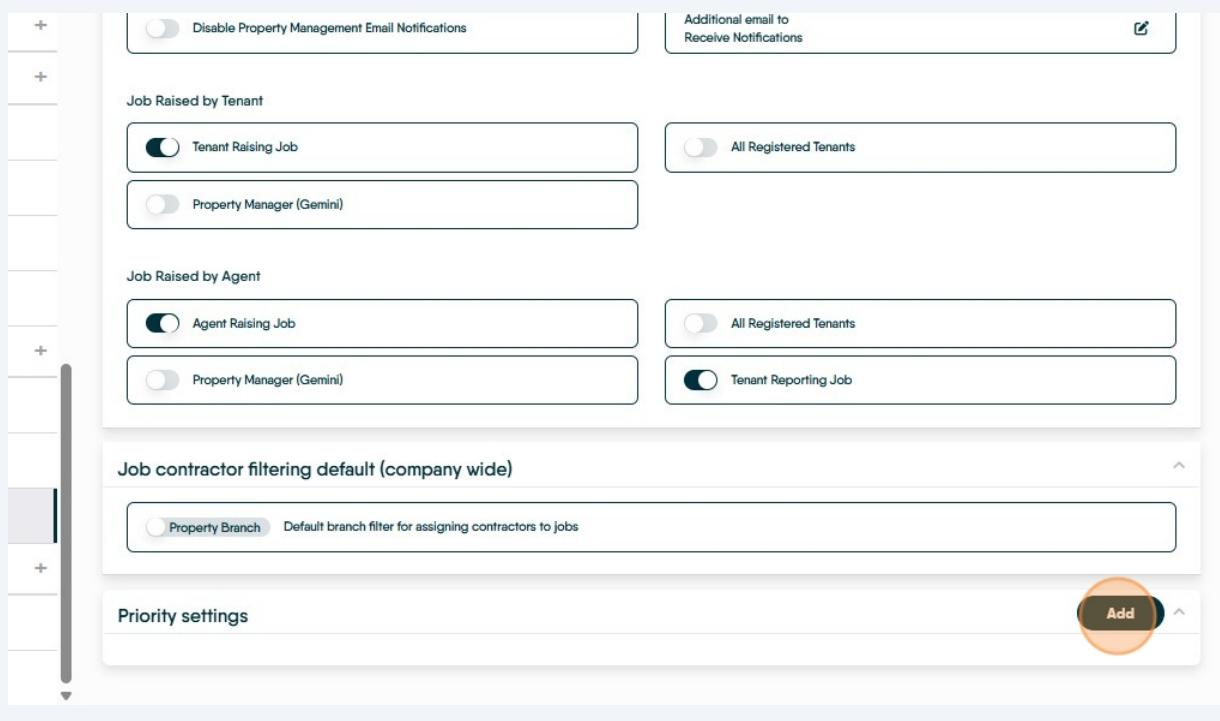
All Branches

Default branch filter for assigning contractors to jobs

Priority settings

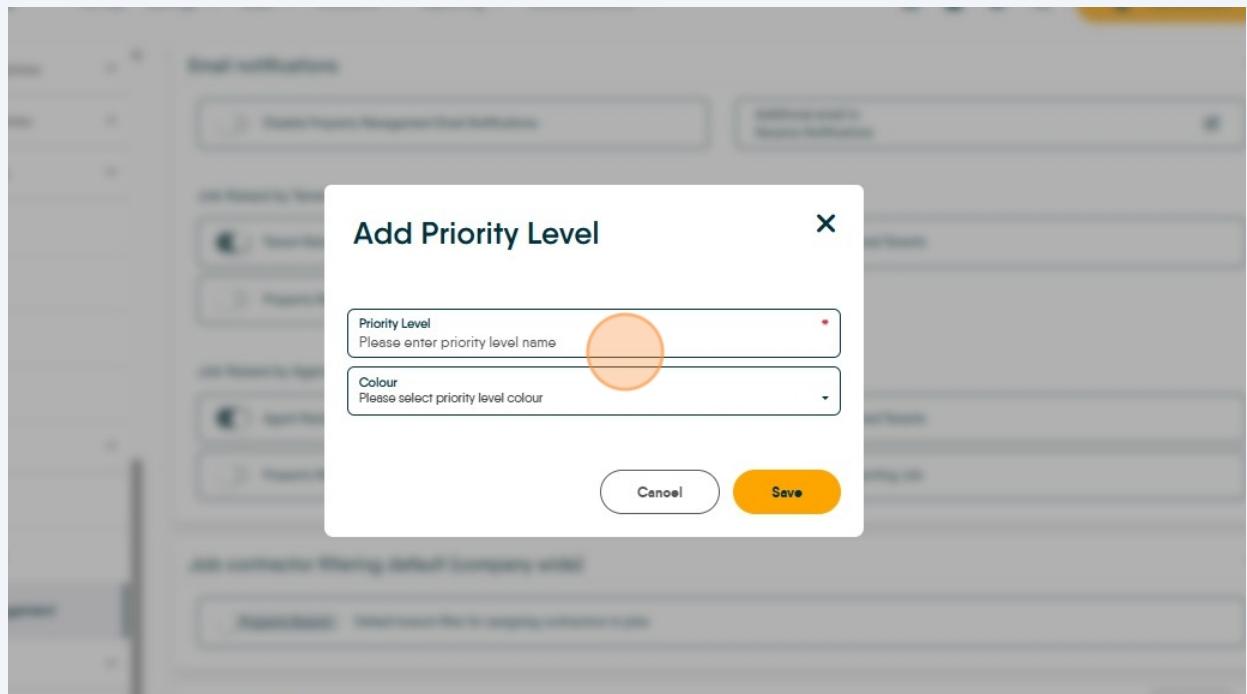
29

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

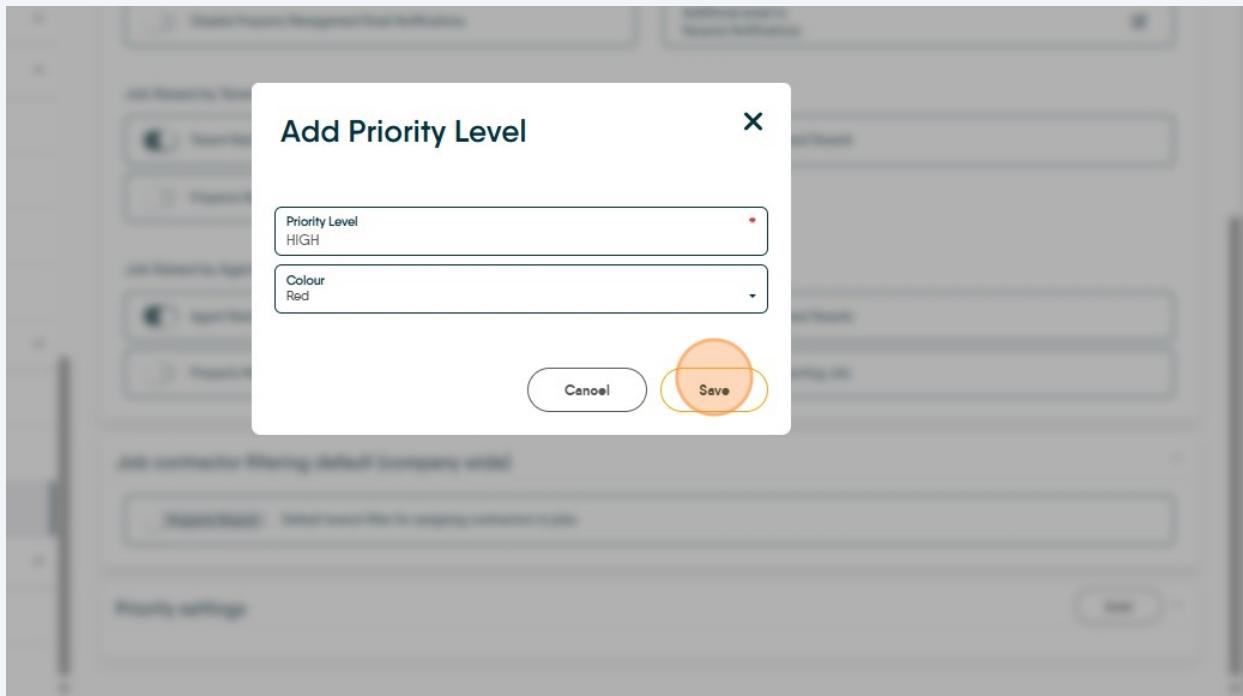


30

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



31 Click "Save"



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

