

Logging a Maintenance Job in CRM Accounts



This guide provides a step-by-step process for logging an Ad-Hoc maintenance job in the Accounts screen of iamproperty CRM, ensuring that users can efficiently document issues that have not been reported via Property Management.

By following these instructions, users can streamline their maintenance requests and enhance property management efficiency. It's an essential resource for anyone looking to maintain accurate records and ensure timely repairs.

1 Navigate to <https://crm.iamproperty.com/Dashboards/Accounts>

The screenshot displays the 'Accounts' dashboard in the iamproperty CRM. The top navigation bar includes 'My day', 'Lettings', 'Sales', 'Accounts', 'Reporting', and 'Communications'. The main content area is divided into several sections:

- Unallocated Funds:** £ 0.00, Unreconciled: £ 2,500.00
- Balance Sheet:** Assets: £ 763,503.25, Liabilities: £ 763,503.25. A table lists various accounts and their balances.
- Expenses:** Total: £ 1,038.43. A donut chart shows the breakdown: Electric (£ 801.00), Gas (£ 12.00), and Water (£ 225.43).
- Deposit:** Total Held: £ 13,528.30, Invoices Outstanding: £ 4,750.00.
- Rent:** Invoiced £ 93,260.00, Received £ 59,840.00, Refunded £ 0.00, Outstanding £ 73,730.00.

2 This process shows how to add a maintenance task that HAS NOT been added via the Property Management dashboard. It is best practice to add all maintenance via the Property Management module to benefit from the better tracking and contractor management features.

3 To add an Ad Hoc expense click here.

The screenshot shows the 'iamproperty' CRM dashboard. The top navigation bar includes 'My day', 'Lettings', 'Sales', 'Accounts', 'Reporting', and 'Communications'. The main content area is divided into several sections: 'Funds' (€ 0.00 Unreconciled € 2,500.00), 'Balance Sheet' (Assets: € 763,503.25; Liabilities: € 763,503.25), 'Service Charge Invoice', 'Expenses' (Total: € 1,938.67), and 'Rent' (Invoiced: € 93,260.00; Received: € 59,840.00). The 'Expenses' section features a donut chart with a legend: Electric (€ 801.00), Gas (€ 12.00), and Water (€ 225.43). A red circle highlights the 'Add Ad Hoc Expense' button in the top right corner of the 'Expenses' section.

4 Click the "Title" field. Add the job title (description for the task)

The screenshot shows the 'Add Expense' form with the following fields:

- Job No. 509
- Date Contacted 22/01/2026
- Title Enter job title (highlighted with a red circle)
- Completion Date 22/01/2026
- Property Select property
- Contractor Select contractor
- Record Type Landlord
- Record Select record
- Expense Category Select expense category
- PM Job Category Select property management categ...
- Priority Level Select priority level
- Description Enter job description
- Notes Enter notes

At the bottom of the form are four buttons: 'Cancel', 'Another', 'Save', and 'Save & Pay Now'.

5 Click the **"Completion Date"** field and add the date the job was completed.

The screenshot shows the 'Add Expense' form with the following fields and values:

Job No. 509	Date Contacted 22/01/2026	
Title Leaking Tap	Completion Date 22/01/2026	
Property Select property	Contractor Select contractor	
Record Type Landlord	Record Select record	
Expense Category Select expense category	PM Job Category Select property management categ...	Priority Level Select priority level
Description Enter job description		
Notes Enter notes		

Buttons at the bottom: Cancel, Another, Save, Save & Pay Now.

6 Search for the Property. Click **"Property Name"** from the list shown.

The screenshot shows the 'Add Expense' form with the 'Property' dropdown menu open. The dropdown list contains the following items:

- west
- 24 Westgarth Terrace, Darlington
- Flat 14 Westpoint, Northumberland Street, Darlington
- 37 West End, Witley
- 12 Broadwater Street East, Worthing
- Natwest 28 Market Place, Barnard Castle

The 'Property' field is currently empty, and the dropdown menu is open, showing the search results. The 'Completion Date' field now shows '26/01/2026'.

Buttons at the bottom: Cancel, Another, Save, Save & Pay Now.

7 When the Property details are added the Landlord details will be completed

Add Expense [X]

Details Attachments Info Payment

Job No. 509 Date Contacted 22/01/2026 *

Title Leaking Tap * Completion Date 26/01/2026

Property Flat 14 Westpoint, Northumberland Street, Darlington * Contractor Select contractor *

Record Type Landlord * **Record Oliver Hardy (Primary) ***

Expense Category Select expense category * PM Job Category Select property management categ... Priority Level Select priority level

Description Enter job description *

Notes Enter notes

Cancel Another Save Save & Pay Now

8 Click "Select contractor" search for your contractor.

N.B. this does not show 'Assoc' (associated) against the contractors names. 'Assoc' contractors details are shown in the 'Info' screen.

Add Expense [X]

Details Attachments Info Payment

Job No. 509 Date Contacted 22/01/2026 *

Title Leaking Tap * Completion Date 26/01/2026

Property Flat 14 Westpoint, Northumberland Street, Darlington * Contractor Select contractor *

Record Type Landlord * Record Oliver Hardy (Primary) *

Expense Category Select expense category * PM Job Category Select property management categ... Priority Level Select priority level

Description Enter job description *

Notes Enter notes

Cancel Another Save Save & Pay Now

9

Click "**Select expense category**" also if required set the PM Job Category and Priority Level.

The screenshot shows the 'Add Expense' form with the 'Details' tab selected. The form contains the following fields:

- Leaking tap
- Property: Flat 14 Westpoint, Northumberland Street, Darlington
- Contractor: Morgan Contracting
- Record Type: Landlord
- Record: Oliver Hardy (Primary)
- Expense Category: Select expense category (highlighted with an orange circle)
- PM Job Category: Select property management categ...
- Priority Level: Select priority level
- Description: Bathroom mixer tap is leaking please repair.
- Notes: Park on Drive
- Progress (%): 0%

Buttons at the bottom: Cancel, Another, Save, Save & Pay Now.

10

Click the "**Description**" field and enter a clear description of the job. This may be shown to the Landlord as part of their statement.

The screenshot shows the 'Add Expense' form with the 'Details' tab selected. The form contains the following fields:

- Job No.: 509
- Date Contacted: 22/01/2026
- Title: Leaking Tap
- Completion Date: 26/01/2026
- Property: Flat 14 Westpoint, Northumberland Street, Darlington
- Contractor: Morgan Contracting
- Record Type: Landlord
- Record: Oliver Hardy (Primary)
- Expense Category: Select expense category
- PM Job Category: Select property management categ...
- Priority Level: Select priority level
- Description: Enter job description (highlighted with an orange circle)
- Notes: Enter notes

Buttons at the bottom: Cancel, Another, Save, Save & Pay Now.

11 Click the **"Notes"** field add any additional notes that you want to add.

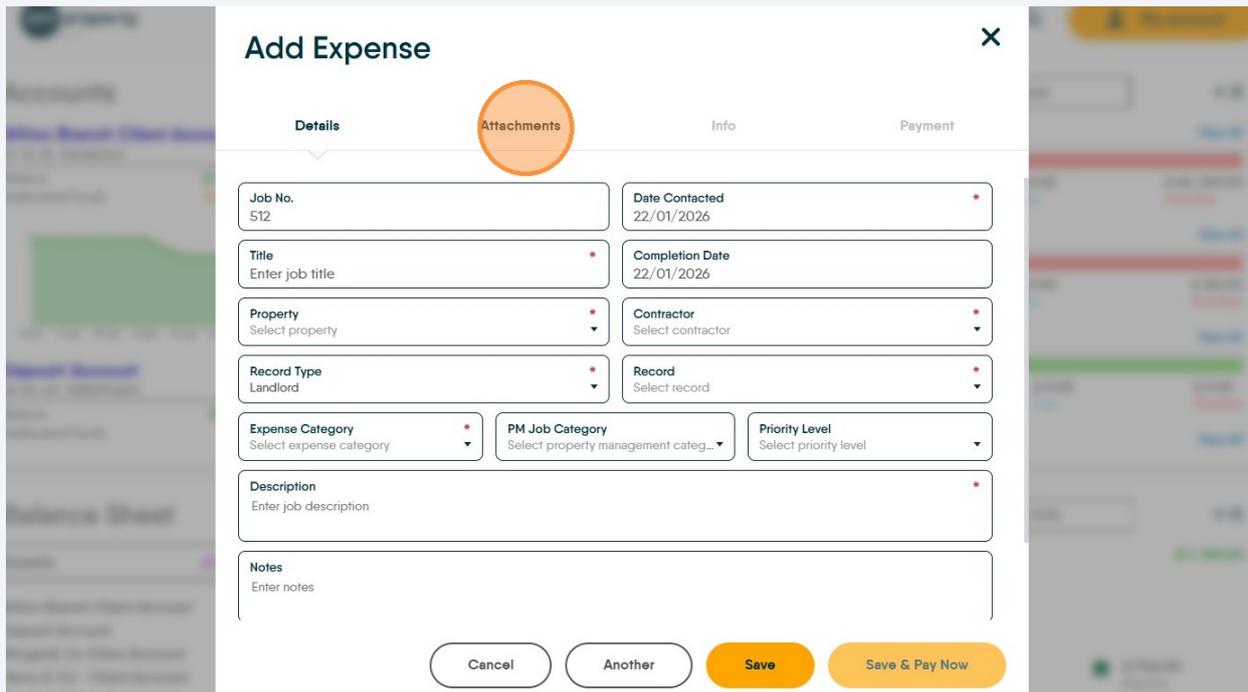
The screenshot shows the 'Add Expense' form with the following fields and values:

- Leaking tap** (Text input)
- 20/01/2020** (Date input)
- Property:** Flat 14 Westpoint, Northumberland Street, Darlington
- Contractor:** Morgan Contracting
- Record Type:** Landlord
- Record:** Oliver Hardy (Primary)
- Expense Category:** Select expense category
- PM Job Category:** Select property management categ...
- Priority Level:** Select priority level
- Description:** Bathroom mixer tap is leaking please repair.
- Notes:** Enter notes (highlighted with an orange circle)
- Progress (%):** 0%

Buttons at the bottom: Cancel, Another, Save, Save & Pay Now.

12 Adding Images or Invoice

13 Click **"Attachments"**

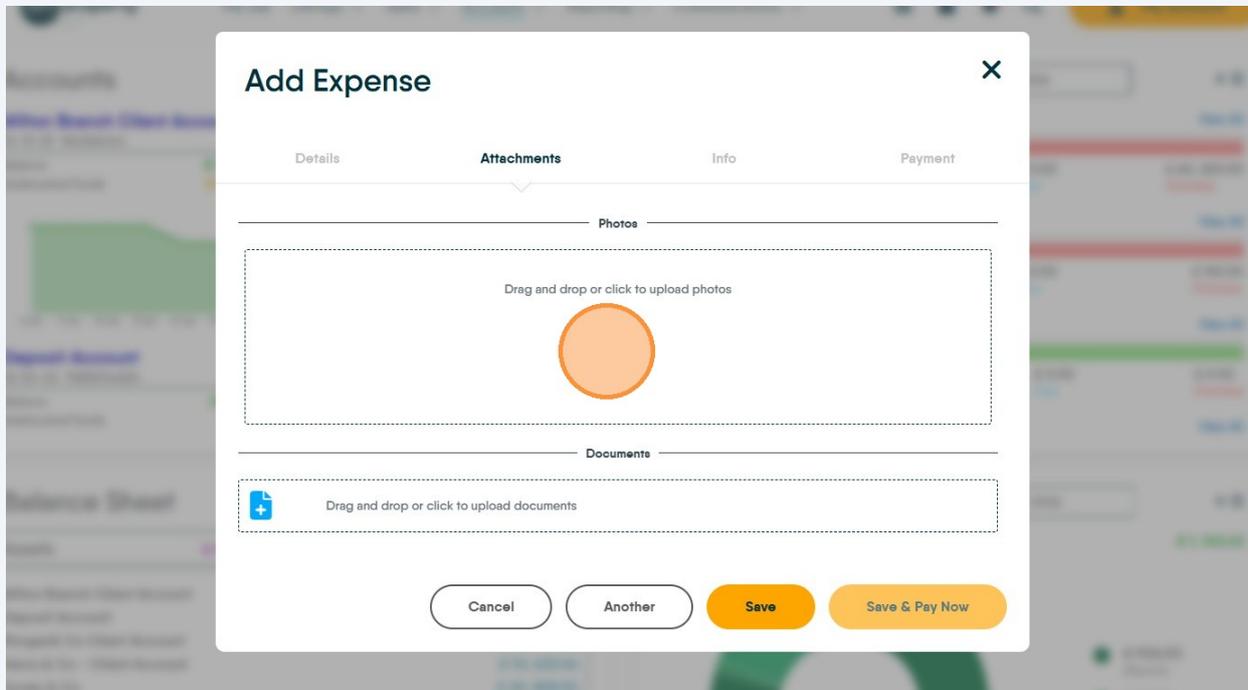


The screenshot shows the 'Add Expense' form with the 'Attachments' tab selected. The form contains the following fields:

- Job No. (Text): 512
- Date Contacted (Text): 22/01/2026
- Title (Text): Enter job title
- Completion Date (Text): 22/01/2026
- Property (Dropdown): Select property
- Contractor (Dropdown): Select contractor
- Record Type (Dropdown): Landlord
- Record (Dropdown): Select record
- Expense Category (Dropdown): Select expense category
- PM Job Category (Dropdown): Select property management categ...
- Priority Level (Dropdown): Select priority level
- Description (Text): Enter job description
- Notes (Text): Enter notes

Buttons at the bottom: Cancel, Another, Save, Save & Pay Now.

14 Click **"Drag and drop or click to upload photos"** you can either search your computer or drag images from an email or folder into here.



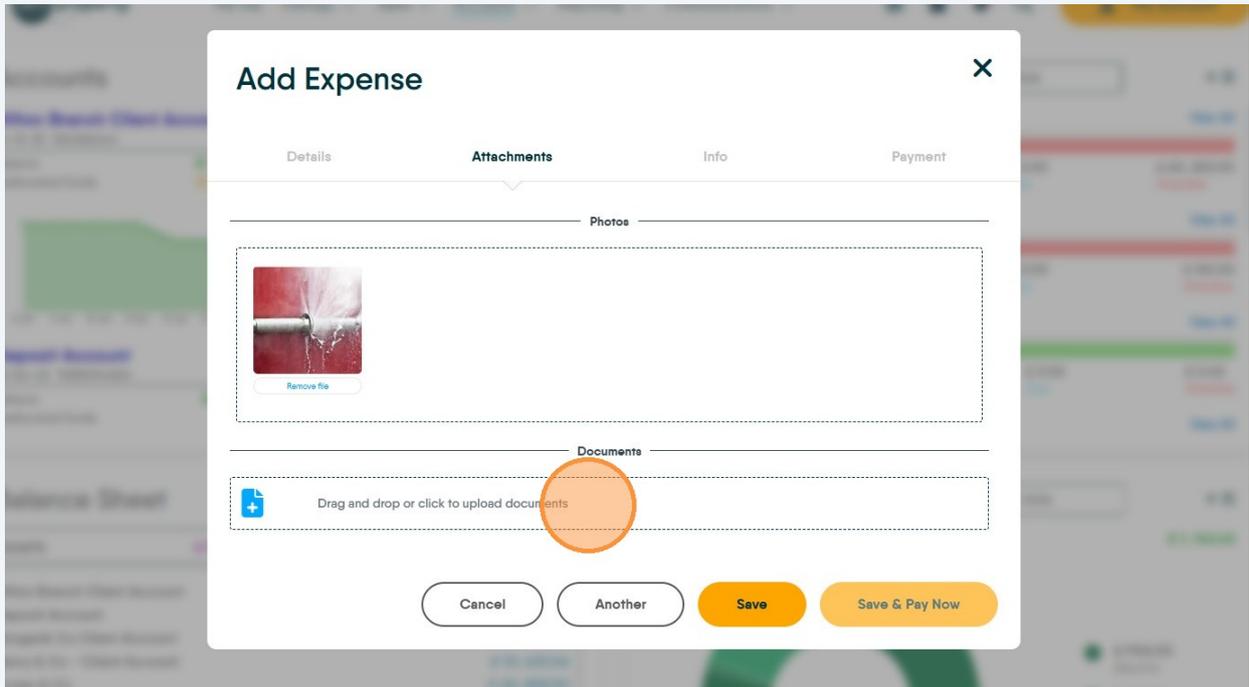
The screenshot shows the 'Add Expense' form with the 'Attachments' tab selected. The form contains the following sections:

- Photos: Drag and drop or click to upload photos
- Documents: Drag and drop or click to upload documents

Buttons at the bottom: Cancel, Another, Save, Save & Pay Now.

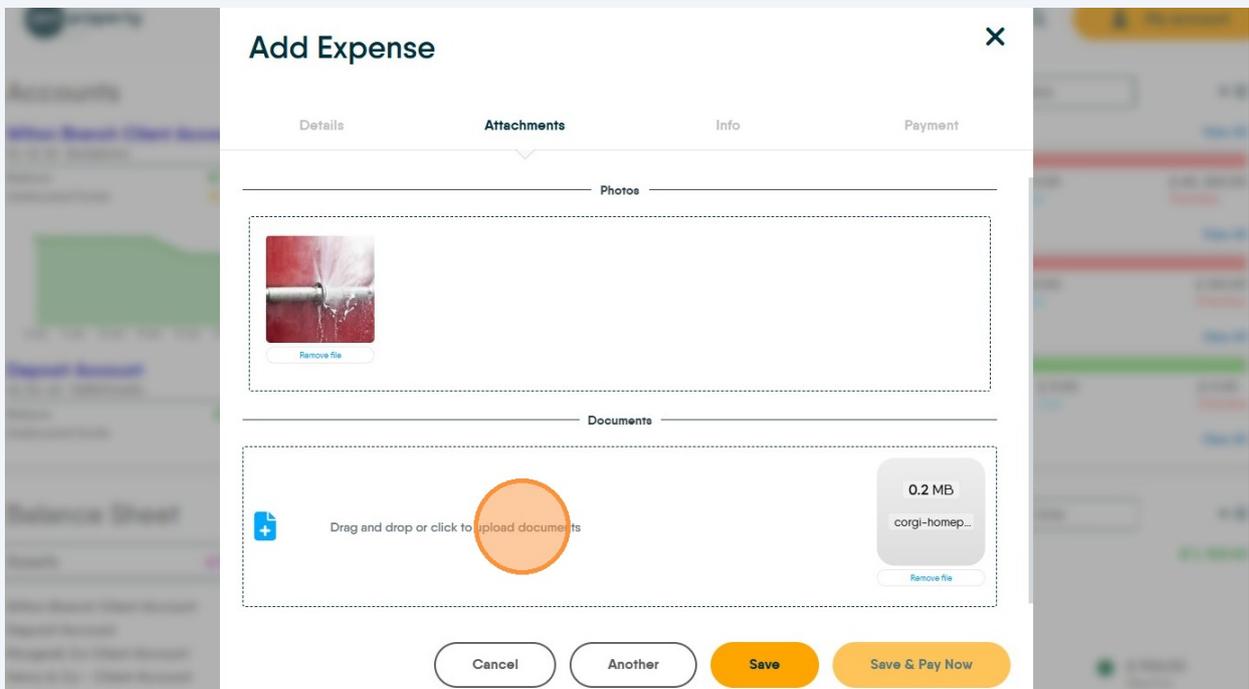
15

Click **"Drag and drop or click to upload documents"** upload any copies of documents into here from emails or folders on your computer. These images could be copies of the Invoice or other types of documents.

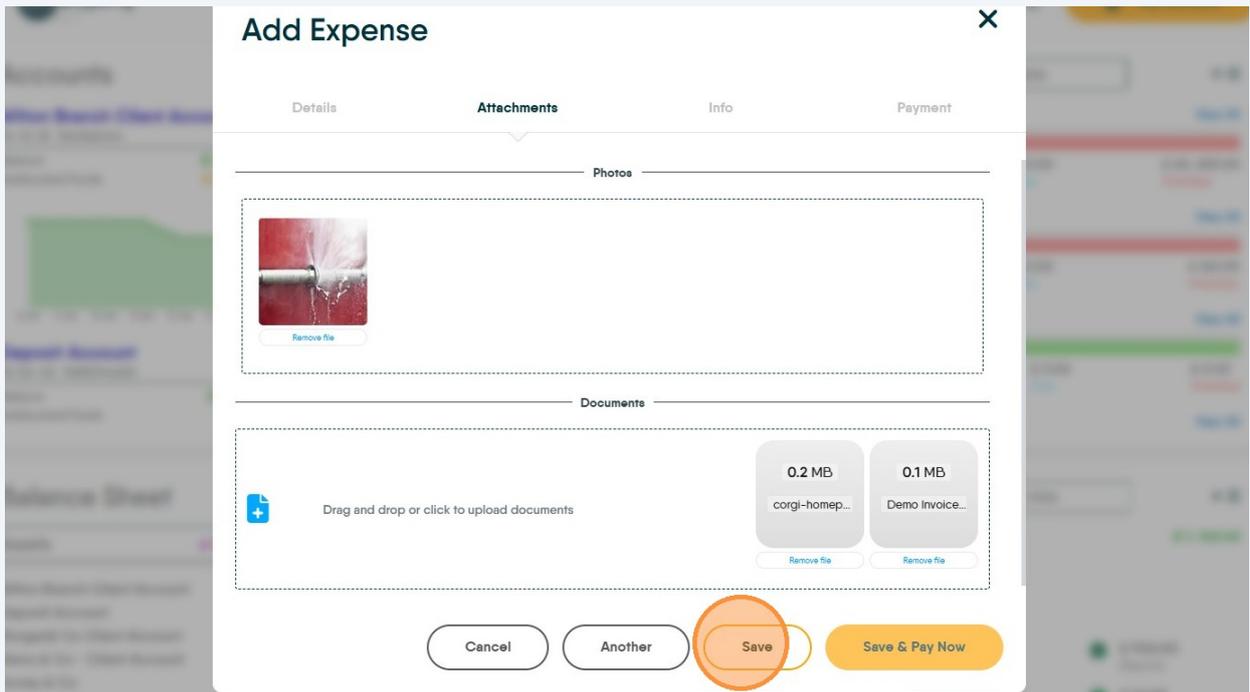


16

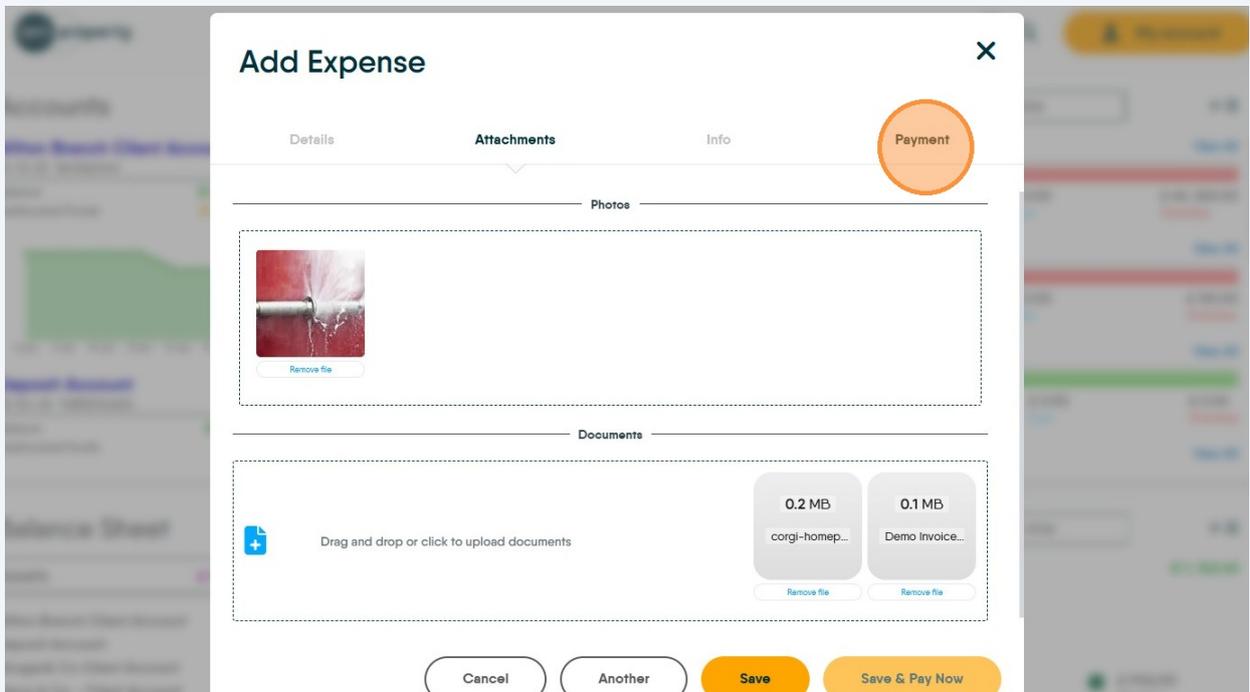
Click **"Drag and drop or click to upload documents"**



17 Click "Save"



18 Click "Payment"



19 Click "Info"

Add Expense

Details Attachments **Info** Payment

Job No. 509 Date Contacted 22/01/2026

Title Leaking Tap Completion Date 26/01/2026

Property Flat 14 Westpoint, Northumberland Street, Darlington Contractor Morgan Contracting

Record Type Landlord Record Oliver Hardy (Primary)

Expense Category Water PM Job Category Plumbing, Leak Priority Level Non urgent

Description Bathroom mixer tap is leaking please repair.

Notes Park on Drive

Cancel Another Save Save & Pay Now

20 Click the "Notes" field add any notes.

Add Expense

Details Attachments **Info** Payment

Authorisation

Requested By Type Agent Requested By Training Dave

Authorised By Training Dave Date Authorised 22/01/2026

Response By Training Dave Date Responded 22/01/2026

Follow Up By Training Dave Date Followed Up 22/01/2026

Notes Enter follow up notes

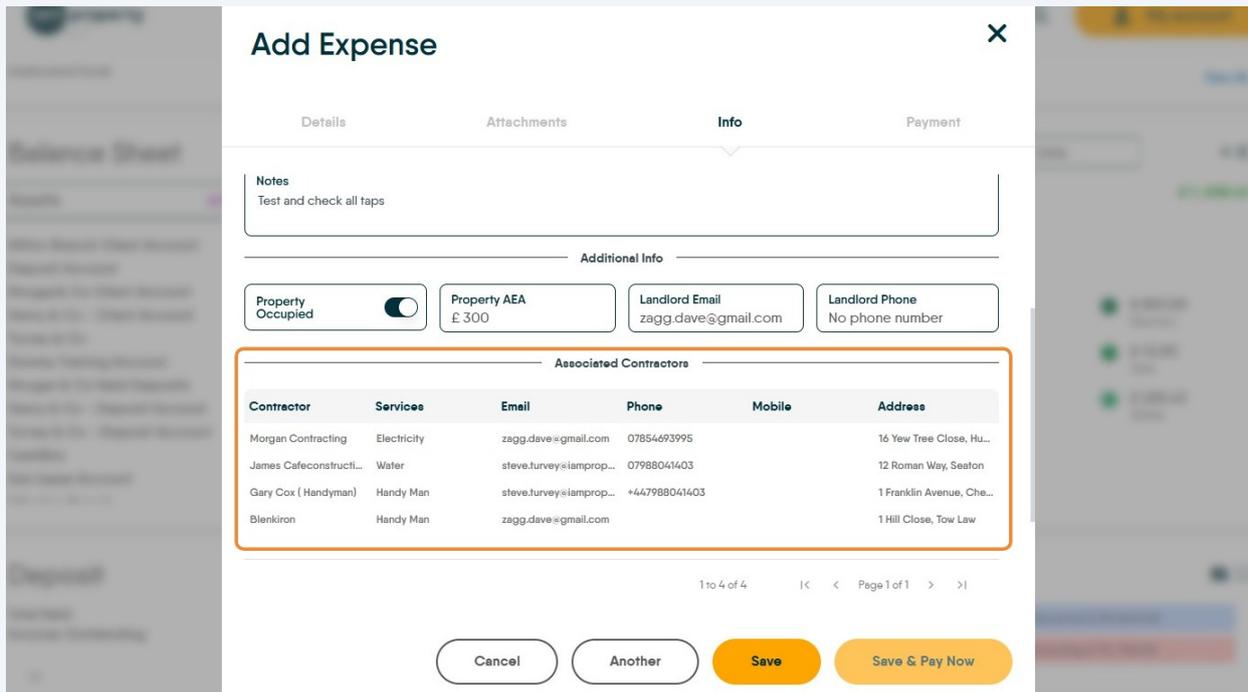
Additional Info

Property Occupied Property AEA £ 300 Landlord Email zaggdave@gmail.com Landlord Phone No phone number

Cancel Another Save Save & Pay Now

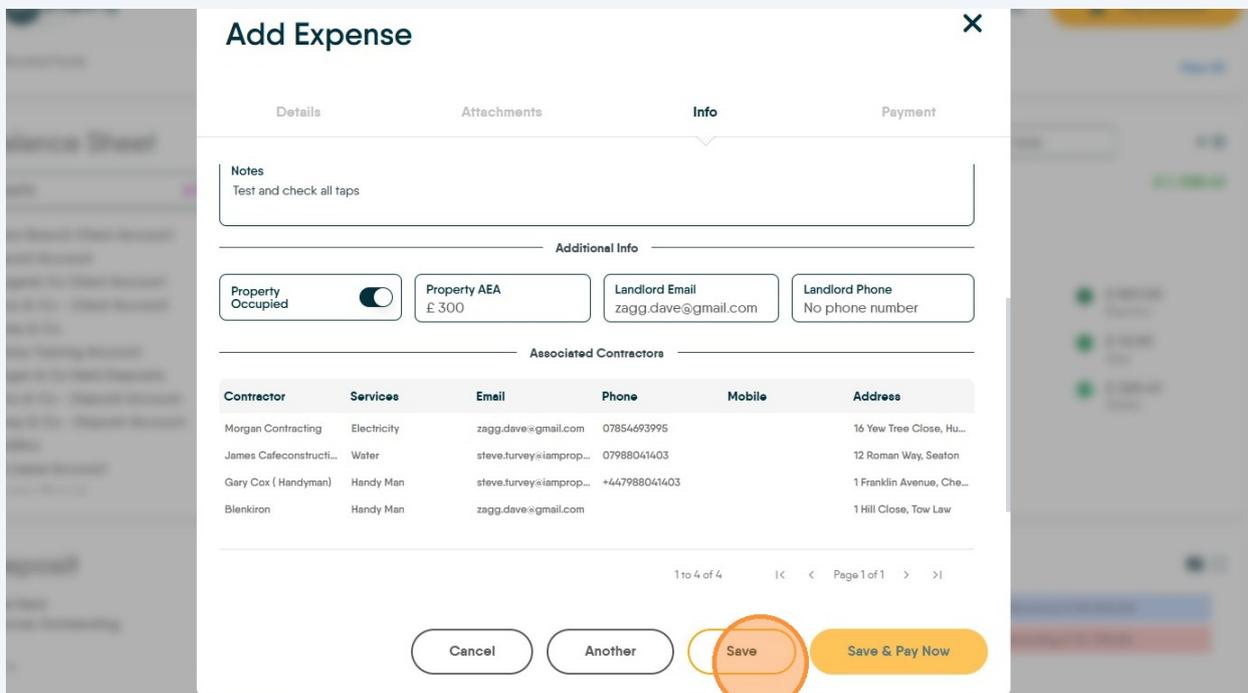
21

A list of assigned contractors for this record is shown at the bottom of the info screen.



22

Click "Save"



23 Invoicing the Landlord.

24 Click here to create the charge to the Landlord. Check the invoice date and the invoice number are correct. The **'Invoice Number'** is created from the configuration and increases by 1 each time.

The screenshot shows the 'Add Expense' form with the following fields and values:

Details			Attachments			Info			Payment		
Property	£ 1,418.35	Float	£ 0.00	Deposit	£ 0.00						
Invoice											
Create Invoice	<input checked="" type="checkbox"/>	Invoice Date	22/01/2026	Invoice No.	CRM - 716	Contractor Invoice No.	Enter invoice no.				
Invoice Amount	£ 0.00	Sub-Type	Compliance Check	VAT Type	Exclusive						
Net	£ 0.00	VAT	£ 0.00	Total	£ 0.00	Tax Deductible	<input type="checkbox"/>				
Split Expense	<input type="checkbox"/>		Tenant	Audrey Morgan (Primary)							
Commission											
Exclude Commission	<input type="checkbox"/>		Commission	£ 15.00	%	£	Amount	£ 0.00			
Cancel			Another			Save		Save & Pay Now			

25

Click the **"Contractor Invoice No."** field. The CRM will warn if this number has been used previously by this contractor.

The screenshot shows the 'Add Expense' form with the following details:

- Property: £ 1,418.35
- Float: £ 0.00
- Deposit: £ 0.00
- Invoice Date: 22/01/2026
- Invoice No.: CRM - 716
- Contractor Invoice No.: Enter invoice no. (highlighted with an orange circle)
- Invoice Amount: £ 0.00
- Sub-Type: Compliance Check
- VAT Type: Exclusive
- Net: £ 0.00
- VAT: £ 0.00
- Total: £ 0.00
- Tax Deductible:
- Tenant: Audrey Morgan (Primary)
- Commission: £ 15.00
- Amount: £ 15.00

Buttons at the bottom: Cancel, Another, Save, Save & Pay Now.

26

Click the **"Invoice Amount"** field.

The screenshot shows the 'Add Expense' form with the following details:

- Property: £ 1,418.35
- Float: £ 0.00
- Deposit: £ 0.00
- Invoice Date: 22/01/2026
- Invoice No.: CRM - 716
- Contractor Invoice No.: 2d
- Invoice Amount: £ 0.00 (highlighted with an orange circle)
- Sub-Type: Compliance Check
- VAT Type: Exclusive
- Net: £ 0.00
- VAT: £ 0.00
- Total: £ 0.00
- Tax Deductible:
- Tenant: Audrey Morgan (Primary)
- Commission: £ 15.00
- Amount: £ 15.00

Buttons at the bottom: Cancel, Another, Save, Save & Pay Now.

27

Click "**Sub-Type**" and set the appropriate option. These control how VAT is charged and are configurable by yourselves.

The screenshot shows the 'Add Expense' form with the following details:

- Property:** £ 1,418.35
- Float:** £ 0.00
- Deposit:** £ 0.00

Invoice Section:

- Create Invoice:**
- Invoice Date:** 22/01/2026
- Invoice No.:** CRM - 716
- Contractor Invoice No.:** 26
- Invoice Amount:** £ 20.00
- Sub-Type:** Compliance Check (highlighted with an orange circle)
- VAT Type:** Exclusive
- Net:** £ 20.00
- VAT:** £ 4.00
- Total:** £ 24.00
- Tax Deductible:**
- Split Expense:**
- Tenant:** Audrey Morgan (Primary)

Commission Section:

- Exclude Commission:**
- Commission:** £ 15.00
- %:** [dropdown]
- £:** [dropdown]
- Amount:** £ 15.00

Buttons: Cancel, Another, Save, Save & Pay Now

28

Commission

29

If you charge a commission to contractors for giving them work or you charge an uplift to Landlords, this is where that is added. Commission is added to the contractor record, in the Financial tabs. Click "Commission" to charge.

The screenshot shows the 'Add Expense' form with the following fields and values:

Details				Attachments		Info		Payment	
Invoice Amount	£ 20.00	Sub-Type	Compliance Check	VAT Type		Exclusive			
Net	£ 20.00	VAT	£ 4.00	Total	£ 24.00	Tax Deductible		<input type="checkbox"/>	
Split Expense		<input type="checkbox"/>		Tenant		Audrey Morgan (Primary)			
Exclude Commission		<input type="checkbox"/>		Commission	£ 15.00	%	£	Amount	£ 15.00
Uplift		<input type="checkbox"/>		Uplift To	£ 0.00	VAT Type		Inclusive	
Net	£ 12.50	VAT	£ 2.50	Total Commission		£ 15.00			

Buttons: Cancel, Another, Save, Save & Pay Now

30

Click "Save" The charge will now be made to the Landlords account. The payment will be taken and the payment made to the Contractor will be made when Perform Payments is next run.

The screenshot shows the 'Add Expense' form with the following fields and values:

Details				Attachments		Info		Payment	
Invoice Amount	£ 20.00	Sub-Type	Compliance Check	VAT Type		Exclusive			
Net	£ 20.00	VAT	£ 4.00	Total	£ 24.00	Tax Deductible		<input type="checkbox"/>	
Split Expense		<input type="checkbox"/>		Tenant		Audrey Morgan (Primary)			
Exclude Commission		<input type="checkbox"/>		Commission	£ 15.00	%	£	Amount	£ 15.00
Uplift		<input type="checkbox"/>		Uplift To	£ 0.00	VAT Type		Inclusive	
Net	£ 12.50	VAT	£ 2.50	Total Commission		£ 15.00			

Buttons: Cancel, Another, Save, Save & Pay Now

31

If shown, click "Yes" or "No" to the option to **Pay Now?**

