

# Linking Property Maintenance Contractors to Properties/Landlords and Warranties



Learn how to associate contractors with specific properties and Landlords within the CRM system. Also adding Warranty details to a property record so they show in property management. This guide covers adding contractor details, managing warranties, and efficiently assigning jobs via email to ensure property issues are resolved quickly.



Alert! You need to have created a Contractor record in CRM before making them an Associated Contractor to do that [click here](#)

## Property Navigation

1 Navigate to the property you need to add Warranties or Contractors to.

The screenshot displays the 'iam property' CRM interface. The top navigation bar includes 'My day', 'Lettings', 'Sales', 'Accounts', 'Reporting', and 'Communications'. A search bar on the right shows the postcode 'DH2 2HX'. The main content area is divided into several sections:

- Property Information:** Includes three status cards: 'Fully managed' (checked), 'Rent collect', and 'Let only'. Below these are fields for 'Management Fee' (£ 10), 'Upfront Letting Fee' (£ 500), and 'Regular Letting Fee' (£ 0).
- Commercial Unit:** A toggle switch is turned on. Below it are three VAT status options: 'Exempt' (checked), 'Inclusive', and 'Exclusive'.
- Financials:** Fields for 'Authorised Expense Amount' (£ 0.00) and 'Estimated Rental Value' (£ 0.00).
- Agreement Name:** 'Lettings Landlord223' with a refresh icon.

A sidebar on the left contains a search bar and a list of menu items: Details, Checklist, Appraisals, Inspections, Accounts, Compliance, Information, maintenance, Payment, and Marketing.

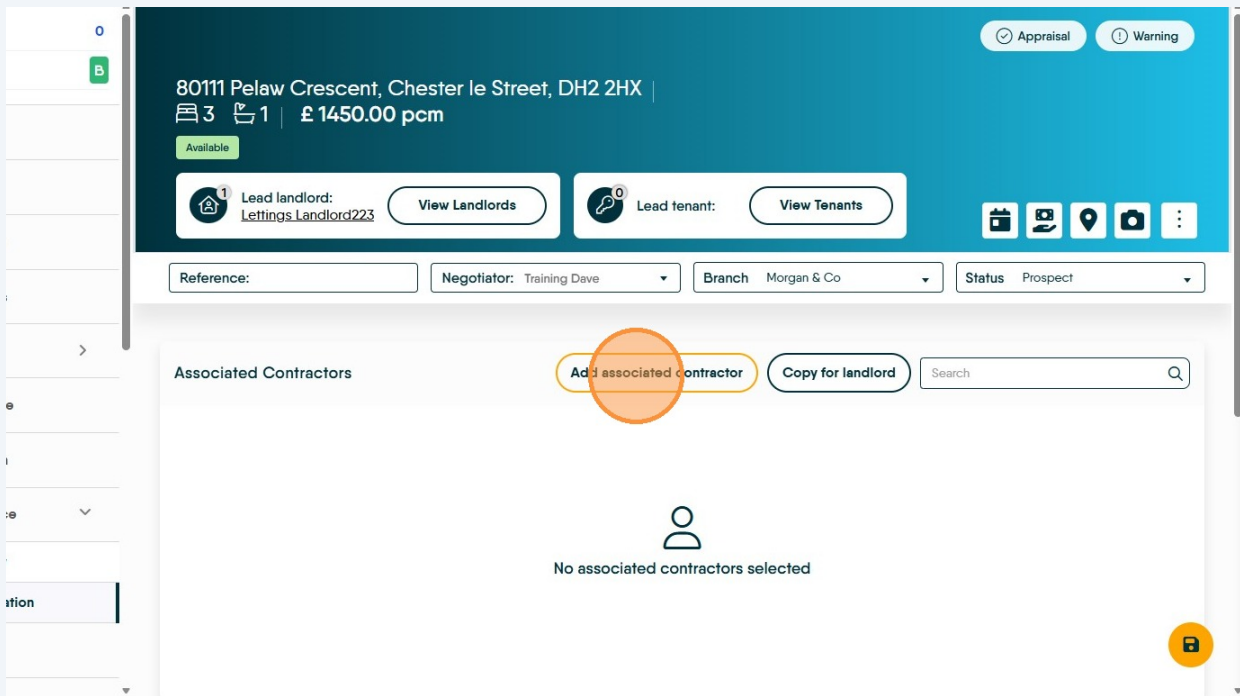
2 Click "Maintenance" in the left navigation menu.

The screenshot shows a software interface with a left-hand navigation menu. The menu items are: Live Jobs (0), EPC Rating (B), Details, Checklist, Appraisals, Inspections, Accounts (>), Compliance, Information, maintenance (highlighted with an orange circle and >), Payment, Marketing, and Key Control. The main content area displays a property image of a modern white building with a curved facade and balconies. Below the image is a 'COMMERCIAL' section with a 'Commercial Unit' toggle switch and three options: 'Exempt' (Rent amount is exempt from VAT), 'Inclusive' (checked, Rent amount is inclusive of VAT), and 'Exclusive' (Rent amount is exclusive of VAT). To the right, there is a 'Property Information' section with a Postcode field (DH2 2HX) and three status cards: 'Fully managed' (checked), 'Rent collect', and 'Let only'. Below these are several input fields: Management Fee (10), Upfront Letting Fee (£ 500), Regular Letting Fee (£ 0), Authorised Expense Amount (£ 0.00), Estimated Rental Value (£ 0.00), and Agreement Name (Lettings Landlord223). At the bottom right, there is a 'Scheduled Management Fee' field with an information icon.

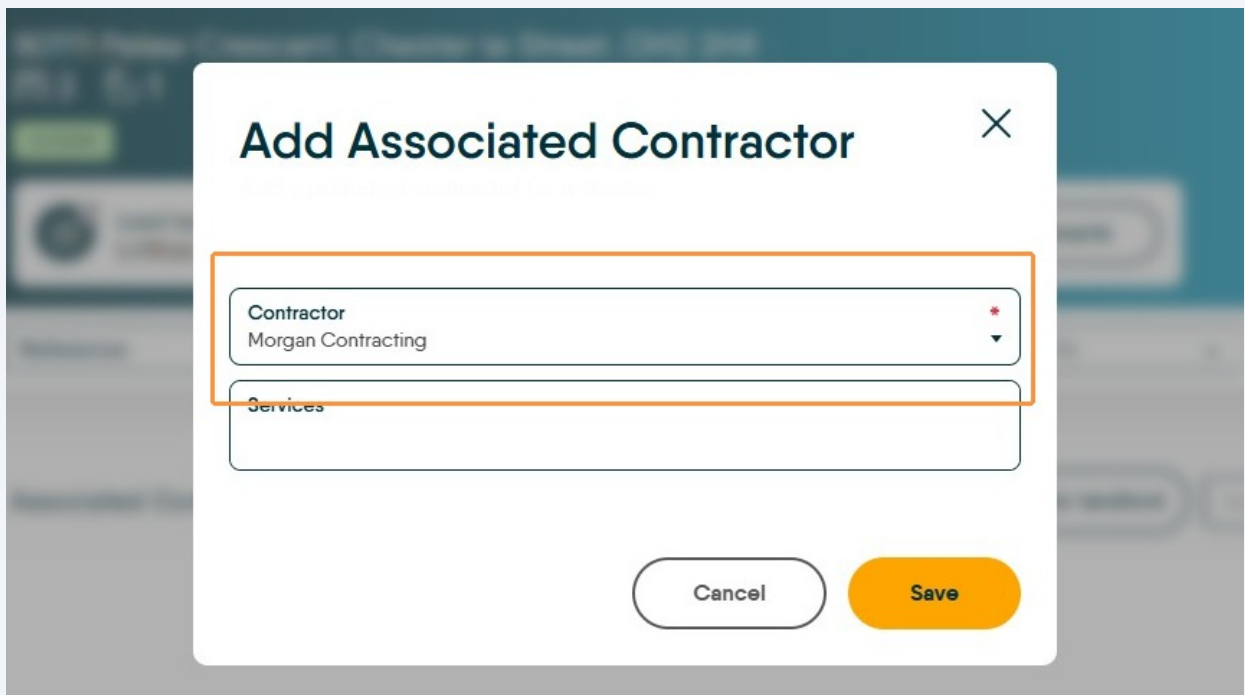
3 Click "Information".

The screenshot shows the same software interface as above, but with the 'Information' menu item highlighted with an orange circle and a dropdown arrow. The main content area remains the same, showing the property image, the 'COMMERCIAL' section with the 'Inclusive' option checked, and the 'Property Information' section with the same fields and values as in the previous screenshot.

4 Click "Add associated contractor"

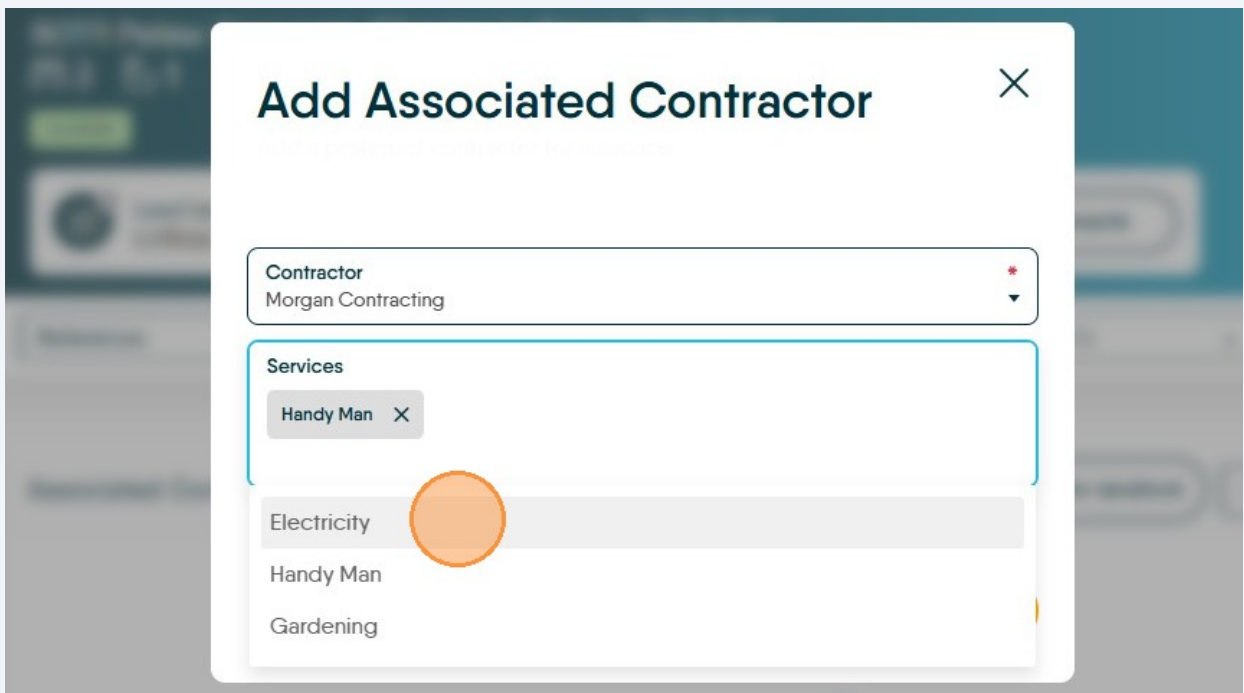


5 Select the **desired contractor** from the dropdown menu.

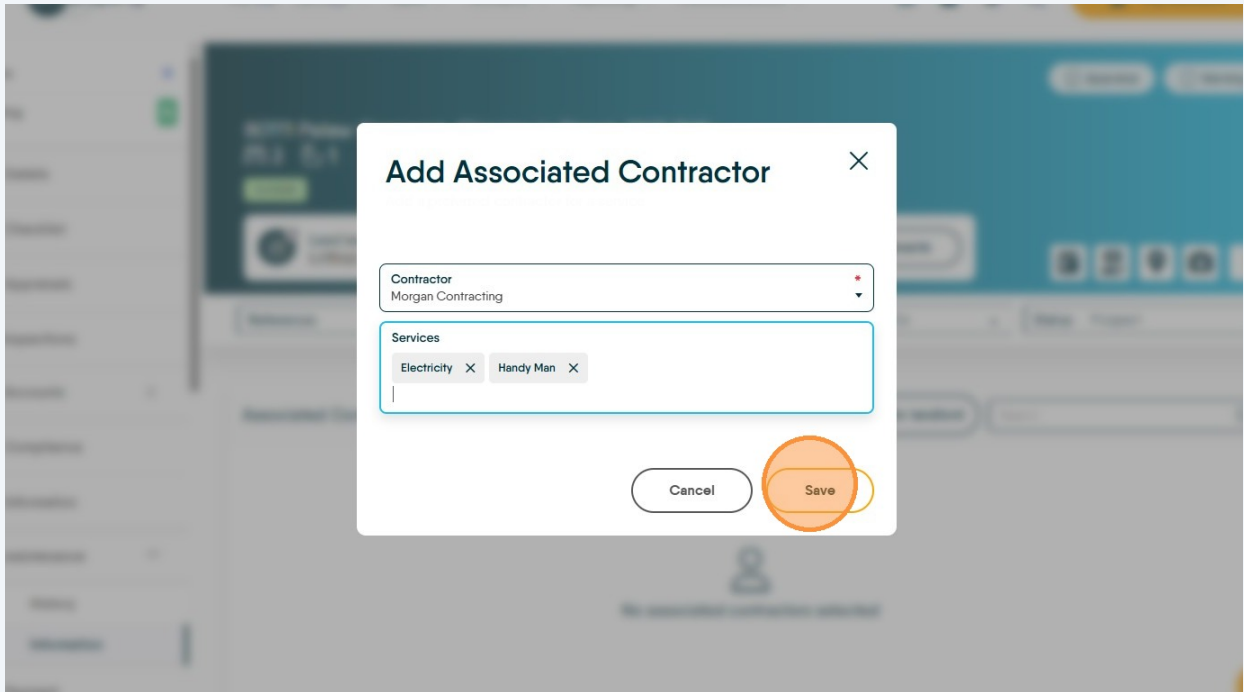


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Then from the **'Services' menu**, select the services that Contractor supplies for that property. Click **"Handy Man"**  
Click **"Electricity"**



7 Click "Save"



## Contractor Synchronization

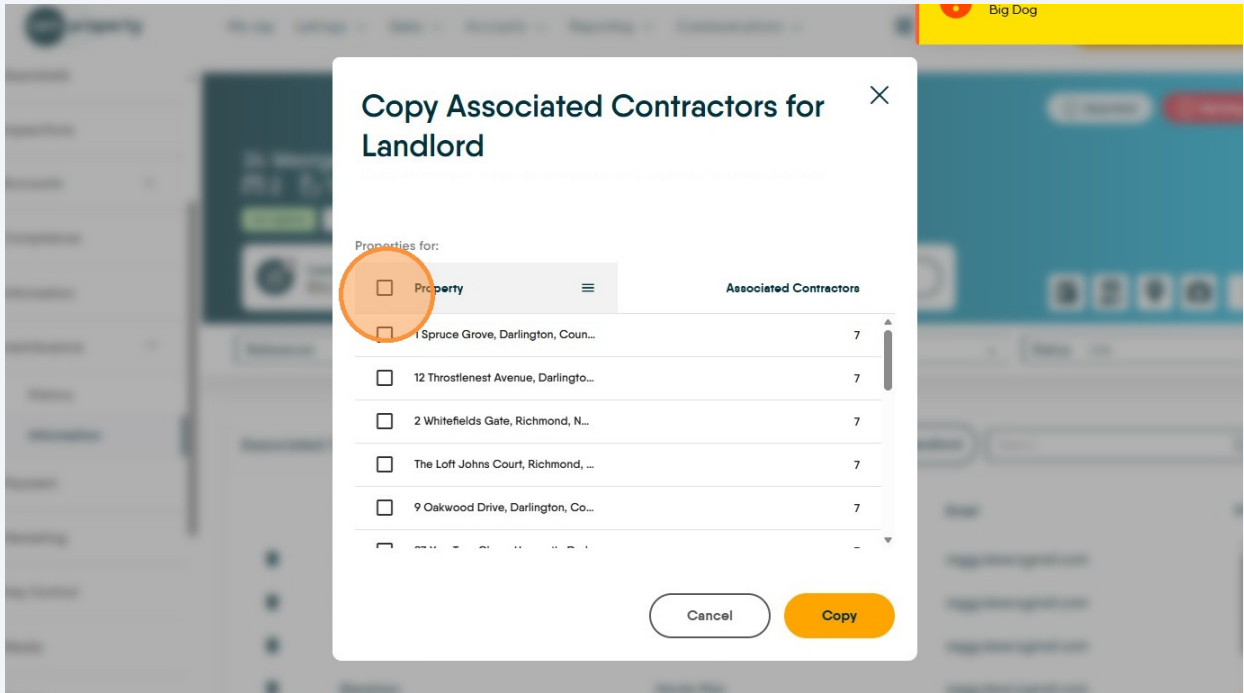
8 Click "**Copy for landlord**" to duplicate associated contractors to other properties controlled by that Landlord.

The screenshot shows a property listing for "80111 Pelaw Crescent, Chester le Street, DH2 2HX". The listing includes details like "3 bedrooms, 1 bathroom, £1450.00 pcm" and "Available". Below the listing are buttons for "View Landlords" and "View Tenants". The "Associated Contractors" section is visible, with a table containing one entry for "Morgan Contracting". The "Copy for landlord" button is circled in orange.

Contractor	Services	Email	Phone	Mobile	Address
Morgan Contracting	Electricity, Handy Man	zagg.dave@gmail.com		07854693995	16 Yew Tr

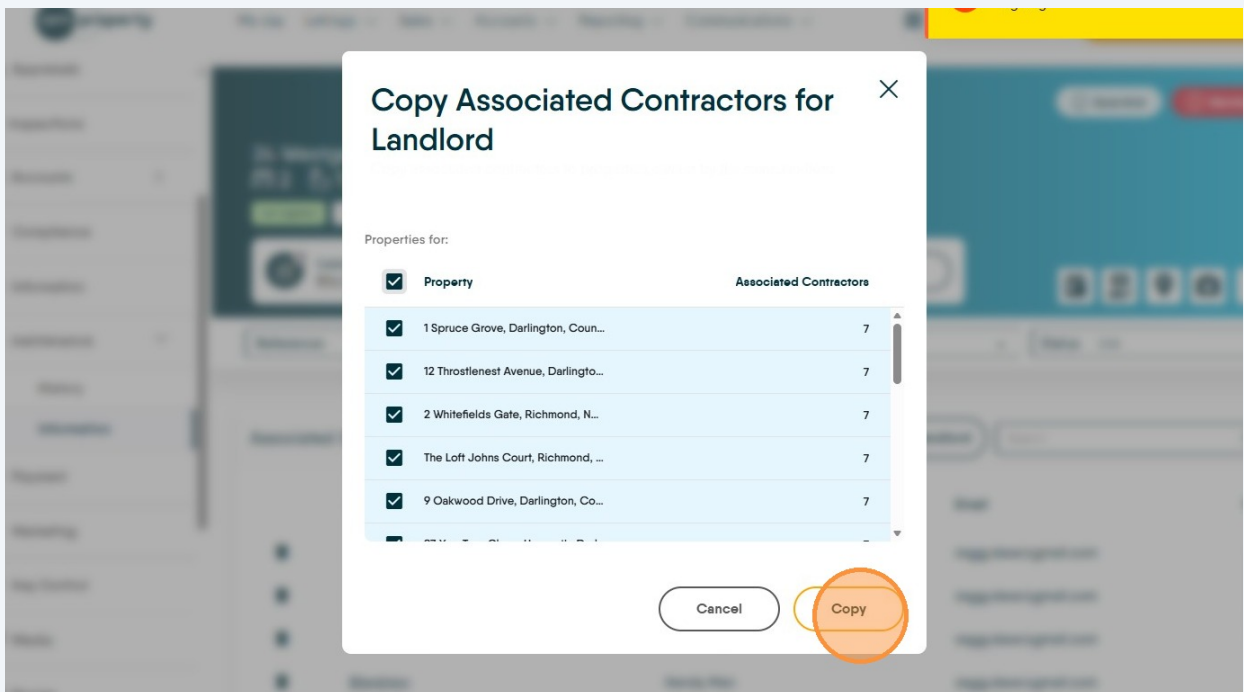
9

Select the checkbox to choose all listed properties. Or, select the individual properties.

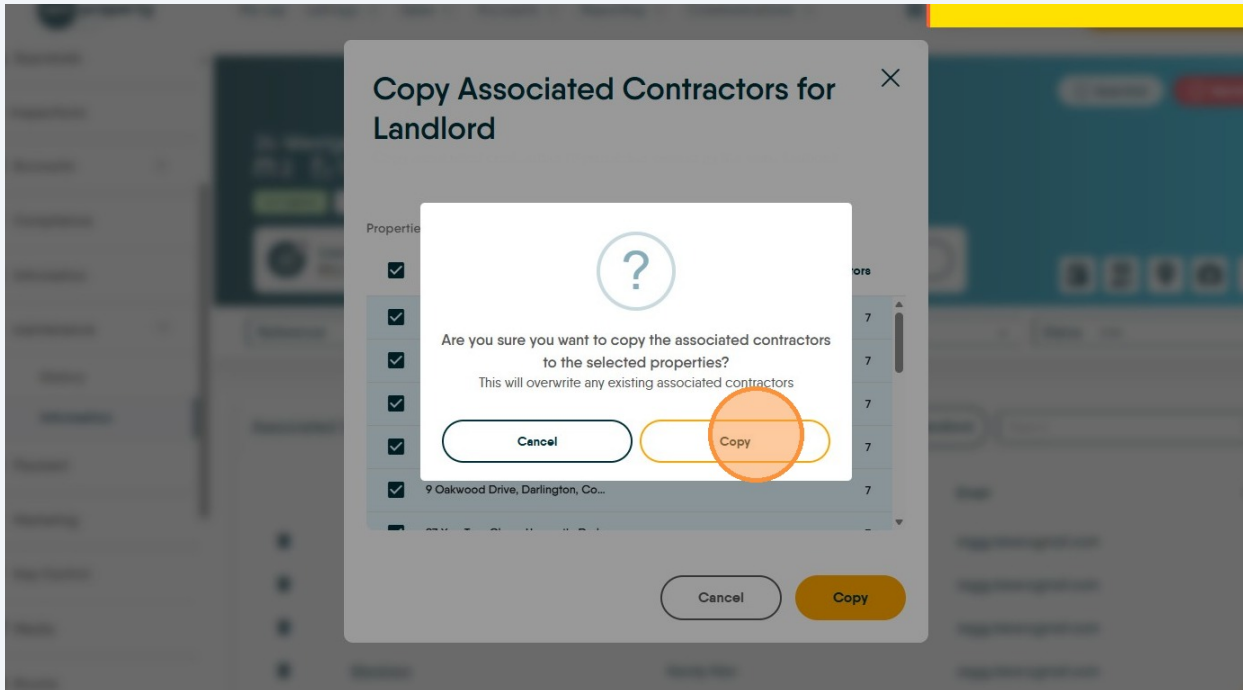


10

Click "Copy"



11 Click **Copy** on the confirmation prompt to finish the synchronization.



## Warranty Management

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To add Warranty information scroll down the screen from where you added the contractors. Click **"Add warranty"**

The screenshot shows a software interface with a top navigation bar containing 'property', 'my day', 'Lettings', 'Sales', 'Accounts', 'Reporting', and 'Communications'. Below this is a list of contractors with columns for contractor name, services, and email address. The 'DM Electrics' row is highlighted. Below the contractor list is a 'Warranties' section with a table containing two rows of warranty information. An orange circle highlights the 'Add warranty' button in the top right of the 'Warranties' section.

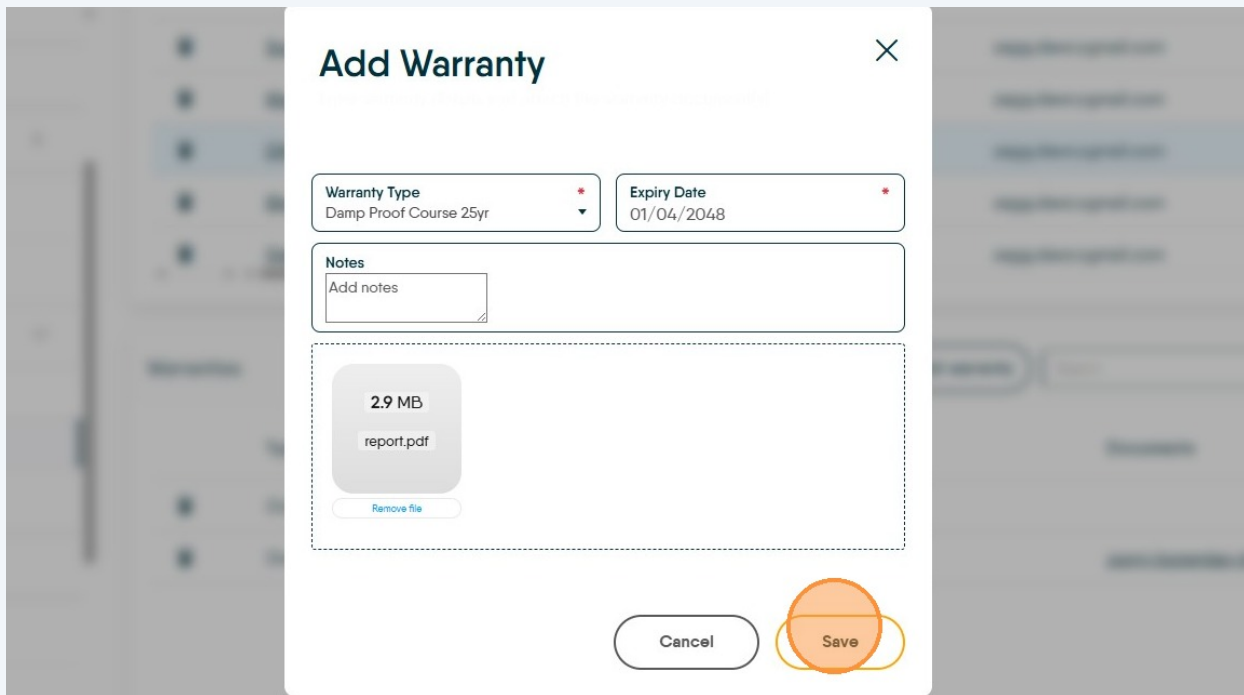
Type	Expiry Date	Notes	Documents
Oven	18/07/2024	test	
Oven	18/07/2024	test	<a href="#">corgi-homeplan-terms-and...</a>

13

Select the **"Warranty Type"** from the dropdown list. This list is a 'lookup' and can be added to, to learn how [click here](#)

The screenshot shows a modal window titled 'Add Warranty' with a close button (X) in the top right. It contains two input fields: 'Warranty Type' and 'Expiry Date'. The 'Warranty Type' dropdown menu is open, showing a list of options: 'Gas Boiler', 'Oven', 'Warranty Cover', 'Damp Proof Course 25y', 'FENSA Windows', and 'FENSA Doors'. The 'Damp Proof Course 25y' option is selected and circled in orange. Below the dropdown is a file upload area with the text 'Drop files here or click to upload'. At the bottom of the modal are 'Cancel' and 'Save' buttons.

**14** Enter the **"Expiry Date"** and click **"Save"**.



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

- Warranty Type:** A dropdown menu with "Damp Proof Course 25yr" selected and a red asterisk indicating a required field.
- Expiry Date:** A text input field containing "01/04/2048" and a red asterisk indicating a required field.
- Notes:** A text area with the placeholder text "Add notes".
- File Upload:** A dashed border box containing a file preview for "report.pdf" (2.9 MB) and a "Remove file" button below it.

At the bottom of the modal, there are two buttons: "Cancel" and "Save". The "Save" button is highlighted with a yellow circle and a red outline, indicating it is the next step in the process.

**Where does this Information Show?**

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When the **'Assign Task'** option is selected in Property Management and the 'Select Contractors' field is selected.

All the contractors will show in the list; **'Assoc'** will show if the contractor is linked to the property in blue to the left side. If a **'Warranty'** is noted on the property then warranty will show in red. If a contractor is not an 'Assoc' contractor they will show with either nothing beside them or 'Warranty' if a warranty is noted.

