

Uploading Documents to CRM Property Management



Learn how to efficiently upload property-related documents to Property Management. This guide simplifies the process of attaching files and managing communications for maintenance and billing tasks.

1

This process can be done from either the Property Management 'Task List' or 'The Offers' screen.

This process is where you want to upload a job quote to the Property Management record for accurate record keeping.

This guide assumes that the quote has been emailed to you from the contractor and you have not used the 'offer job' function.

Job Selection

2

Click property name to select property task.

The screenshot displays the CRM Property Management interface. At the top, there is a search bar with the placeholder text "Search for ID, name, report, telephone, email or address". Below the search bar, there are four tabs: "Create Job", "My Jobs", "Feedback Centre", and "Invoices". The "My Jobs" tab is currently selected. Below the tabs, there is a section titled "Filter by Priority Level" with buttons for "High", "Medium", "Low", "Water", "Gas", "Electric", "Court of Protection", "David", "Steve", "Awaiting Invoice", and "None". Below the filters, there is a job listing for "24 Westgarth Terrace, Darlington (Radiator Heating)". The job is marked as "Offered" with a yellow tag and has the ID "633372". There are three buttons below the job title: "ASSIGN", "Complete Job" (which is highlighted with an orange circle), and "Cancel Job". To the right of the job listing, there is a "Priority: None" label and a "Notes" field containing the text "wojg;ls f,l v'kg'l'b'b,df'gd, df". On the far right, there is a small text block that reads: "Miss Ella Petch", "Created: 06/11/20", "Updated: 04/02/2", "15:41:17", and "Updated by: Trainin".

Document Upload and Management

3 Click **Documents** tab.

Management > Maintenance Jobs > Report #0555/Z

24 Westgarth Terrace, Darlington

Job Fault
Radiator - Heating

Priority Level
Select Priority Level

wojg;ls f;l v'kg'lb'b,df'gd, df

Offered

Assign

Sign In

Sign Out

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

Upload Photos


Photos
You have no photos

4 Click **Upload Document** and select a file or drag and drop it into the upload screen.

Property Management > Maintenance Jobs > Report #0555/Z



24 Westgarth Terrace, Darlington

Job Fault
Radiator - Heating

Priority Level
Select Priority Level

wojg;ls f;l v'kg'lb'b,df'gd, df

Offered

Assign

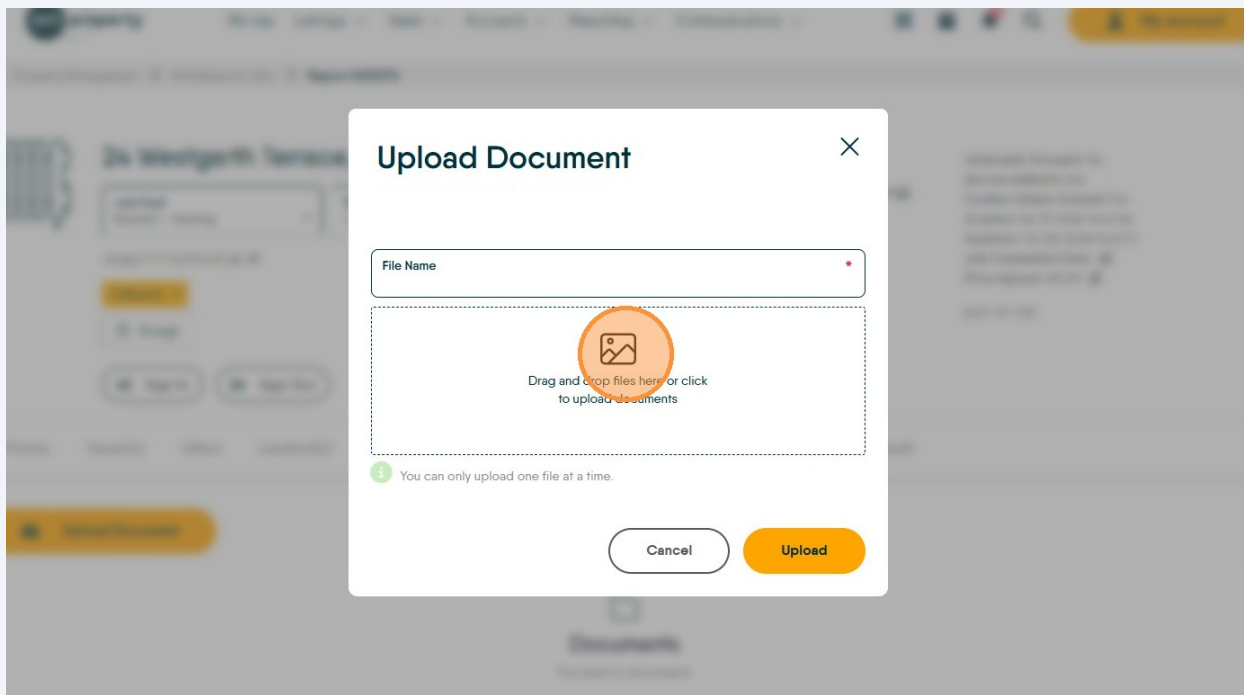
Sign In

Sign Out

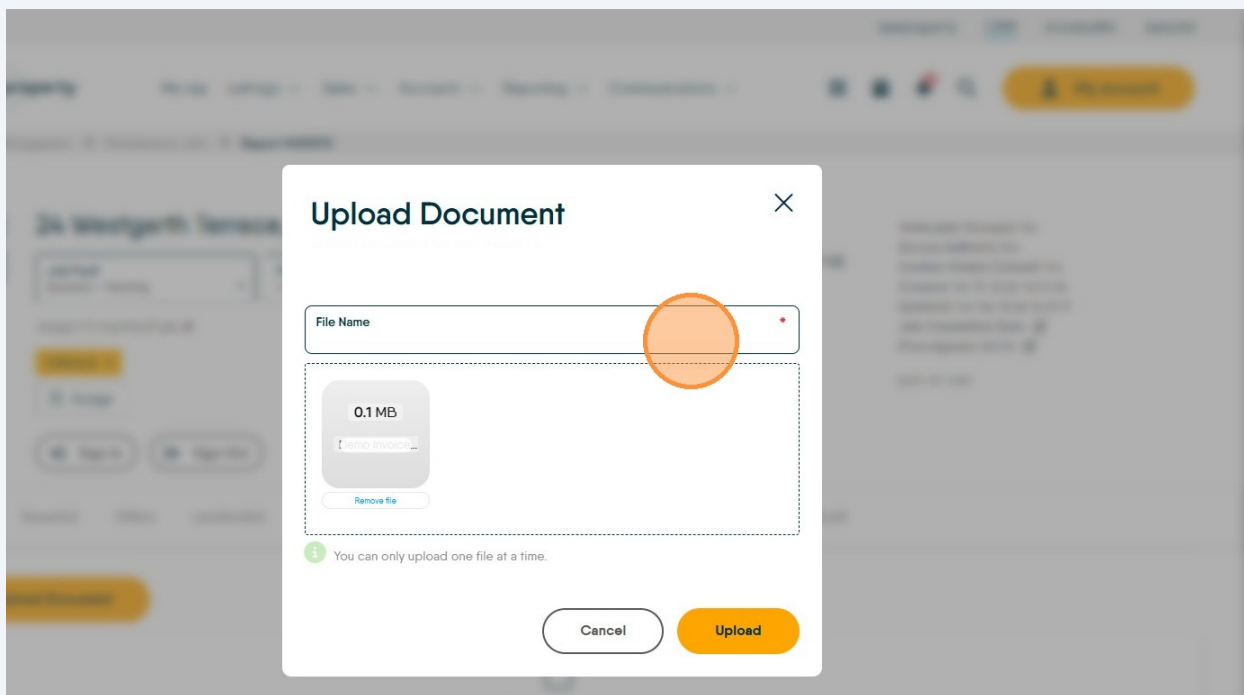
Photos Tenant(s) Offers Landlord(s) Contractor Comments Feedback Invoice **Documents** Audit

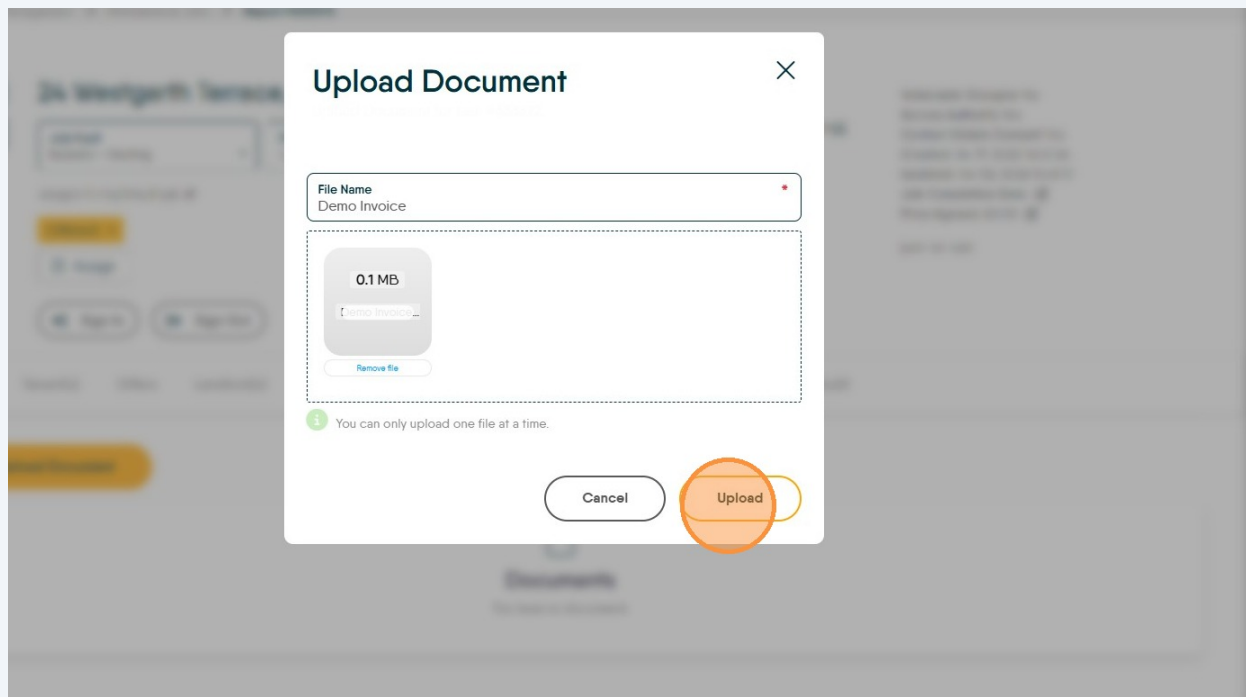
 **Upload Document**


Documents
You have no documents

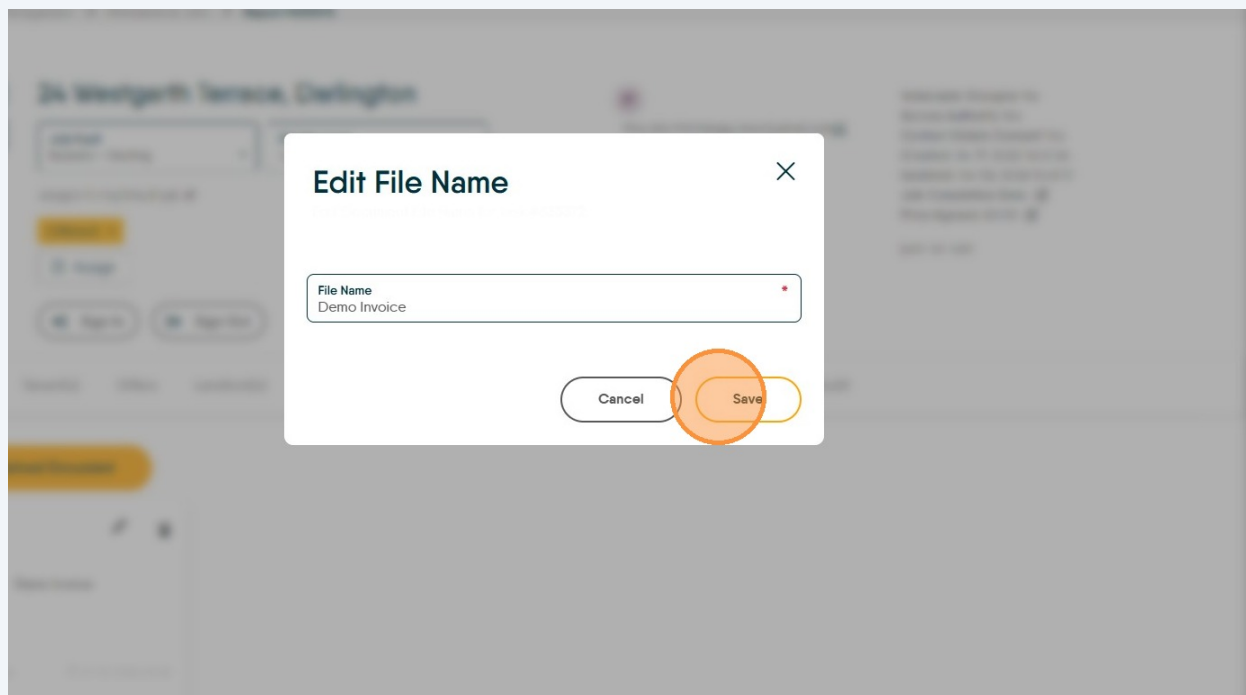


- 5 Enter the file name and click **Upload** to confirm the document addition.





6 Click **Save** to store the document.



Verification and History

7

Click **Audit** tab to verify action history. This will confirm the date and time the document was uploaded.

Management > Maintenance Jobs > Report #6353/Z

24 Westgarth Terrace, Darlington

Job Fault
Radiator - Heating

Priority Level
Select Priority Level

Miss Ella Petchzagg.dave@gmail.com

24 Westgarth Terrace
Darlington
County Durham
DL1 2LA
UK

Vulnerable Occupier No
Access Authority Yes
Contact Details Consent Yes
Created: 06/11/2025 14:51:34
Updated: 04/02/2026 15:41:17
Job Completion Date:
Price Agreed: £0.00
park on road

Offered

Assign

Sign In

Sign Out

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

Search

	User	Field	Old Value	New Value
26 20:54:32	Training Dave	Document	Demo Invoice	Demo Quote
26 20:48:48	Training Dave	Document		Uploaded a new document: De...
26 15:41:18	Training Dave	Offered To Contractor(s)		Job Offered - Offer Id: #63618...
26 15:41:18	Training Dave	Job Completion Date		04/02/2026