



BLOCKWORX

Helpsheet

**Linking to a Property Management
Company via Blockworx - App**

JAN 2021



Introduction

Blockworx is a digital platform which provides a direct link with the Property Management companies you carry out work for.

This Helpsheet will guide you through the process of linking up to one of those Property Management Companies via your Blockworx account using your Blockworx Web Portal.

This will allow estimate requests, work orders for jobs, requests for invoices and diarised charge checklists to come directly through to your Blockworx account from the property management company.

In order to establish this link, you will need to use a code provided by the Property Management Company.

Step 1 - Log in to your Blockworx App

- Click to access the Blockworx from your mobile device and make sure you are signed in.



Step 2 - Accessing PM Company Connections in your App

- In the main navigation menu in the Blockworx App, tap to access **PM Connections** towards the bottom of your screen.



- This will open the **PM Company Connections** screen.

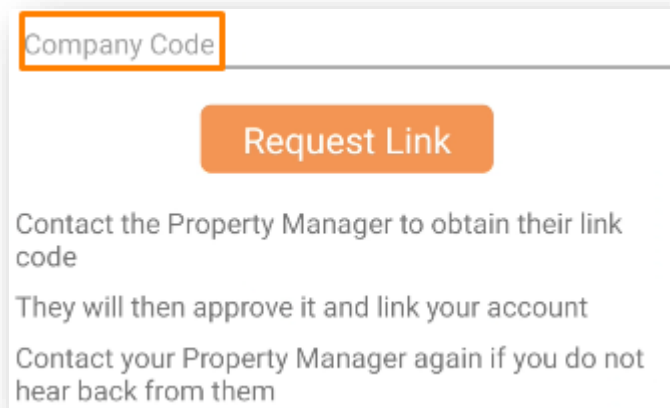


- If you are not currently linked to a Property Management company then you won't see any listed in this screen.
- Tap on the **Link a new property manager** button.

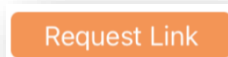


Step 3 – Requesting to Link with a Property Management company

- This will open the screen below.



- If you have already been issued a code by the property management company then enter this in the **Company Code** field.
- Once you have entered your code, click on the orange **Request Link** button.



- The property management company will receive your request to link with them. They will verify this and link your Blockworx site to the account details they already hold for your company.
- Please note, if you have not been issued with a company code, then you should contact the Property Management Company directly. Each Property Management Company has their own unique code.

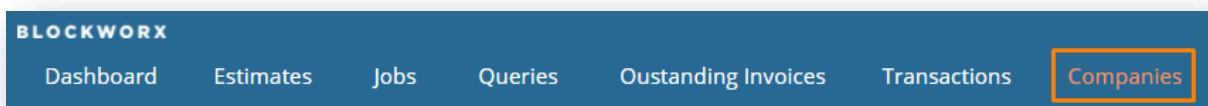


Step 4 – After Your Link has been Approved

- When the property management company have approved your request they will be listed as one of your **PM Company Connections**.
- To check this, click on **PM Connections** in your Blockworx App and you should see them listed on the **PM Company Connections** screen.



- Further information on each connection can be found by accessing this information in the Blockworx Web Portal.



- Each company will be listed along with the appropriate contact details.

You can now get started with responding to estimate requests, work orders for jobs, requests for invoices and diarised charge checklists.

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