



BLOCKWORX

Helpsheet

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

JAN 2021



Introduction

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

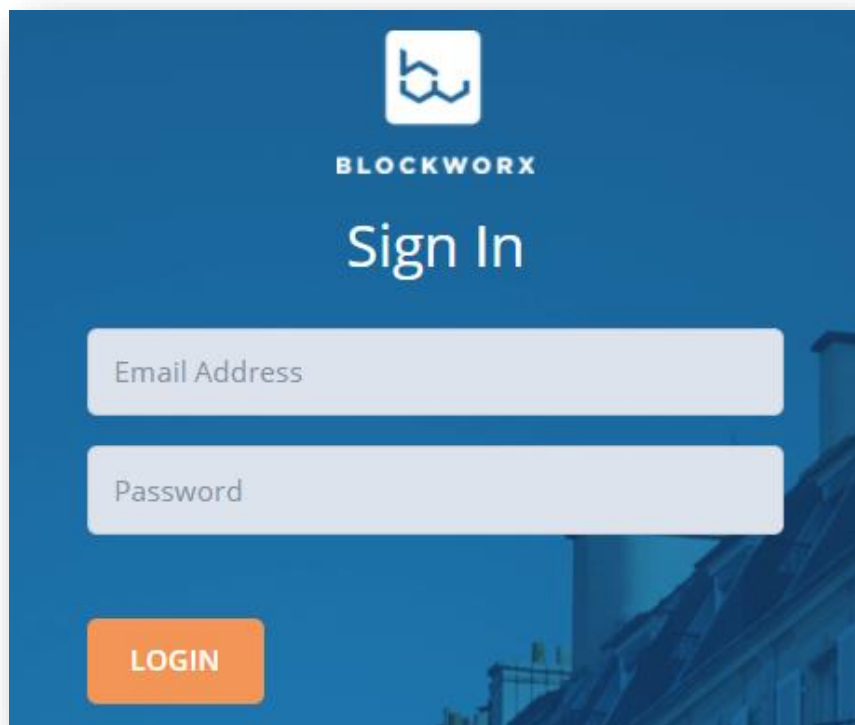
This Helpsheet will guide you through the process of linking up to one of those Property Management Companies via your Blockworx account using your Blockworx Web Portal.

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 Web Portal

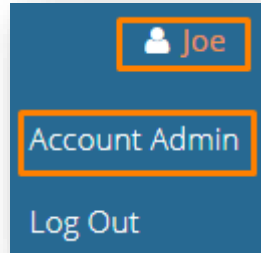
- Click [here](#) to access the Blockworx Web Portal or type Blockworx.co.uk into the address bar of your web browser.
- This will take you to the main Blockworx screen where you will be able to sign in with your username and password.



Step 2 - Accessing Account Admin in Blockworx



- Once you are logged into the main Blockworx screen, use your mouse to hover over your name in the top right-hand corner of the screen and a menu of options will appear.
- Click on the **Account Admin** option.



- This will open the **Account Admin** screen where you will see your details listed on the left-hand side.

ACCOUNT ADMIN

Account Details for Joe Bloggs

First Name	<input type="text" value="Joe"/>
Last Name	<input type="text" value="Bloggs"/>

Step 3 - Entering your Property Management Link Code

- On the right of this screen is where the **Property Manager Link** field is located.



PROPERTY MANAGER LINK

Company Code

Request To Link With The Property Manager

- If you have already been issued a code by the property management company then enter this in the **Company Code** field.

Company Code

Step 4 – Requesting to Link

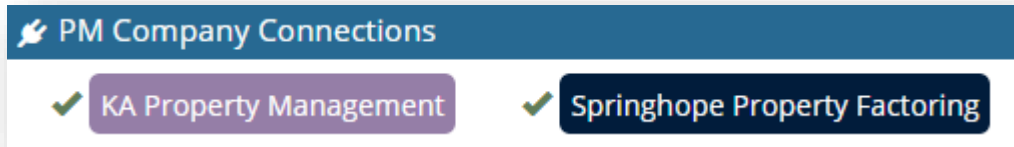
- Click on the orange **Request To Link With The Property Manager** button.

Request To Link With The Property Manager

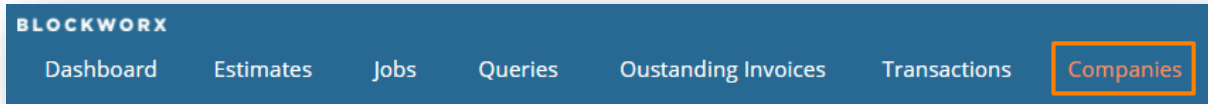
- The property management company will receive your request to link with them. They will verify this and link your Blockworx site to the account details they already hold for your company.
- Please note, if you have not been issued with a company code, then you should contact the Property Management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

Step 5 – After Your Link has been Approved

- When the property management company have approved your request they will be listed as one of your connections.
- To check this, log in to Blockworx and look at the **PM Company Connections** section which currently sits at the top of all Blockworx screens.
- You will see the individual company listed here.



- Further information on each connection can be found by clicking on the **Companies** link in the menu bar at the top of the screen.



- 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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