

Setting Up a Scheduled Management Fee in iamproperty CRM



This guide provides a step-by-step approach to setting up scheduled management fees in iamproperty CRM.

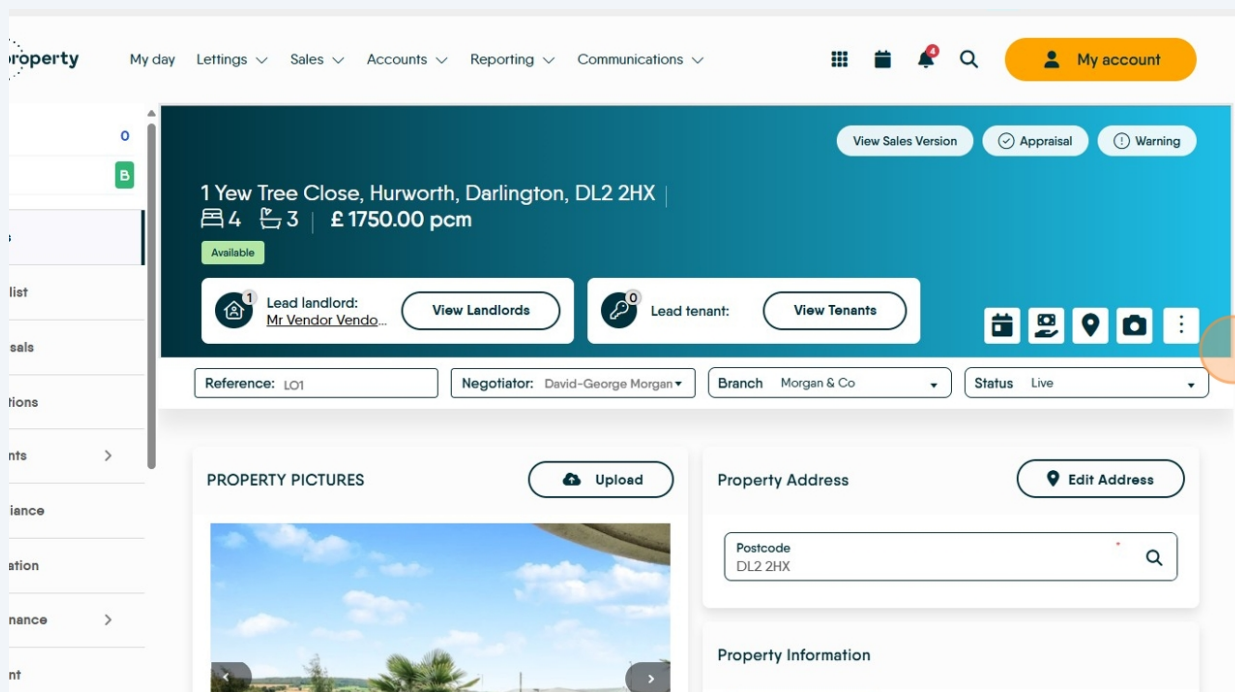
The scheduled management fee charges a fixed amount on a specified schedule. This fee is charged in ADDITION to the the management fee entered in the property information panel.

From this guide Users will learn how to set the amount, frequency, and next charge date.



Alert! This fee is charged in ADDITION to the the management fee entered in the property information panel.

- 1 Navigate to the property you want to create the Scheduled Management fee for.



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Scroll down the screen, on the left side under the 'Property Information' panel, you will see the Scheduled Management Fee.

Click the "Amount" field and set the amount of the charge.

The screenshot shows the 'Property Information' panel in the iamproperty CRM. The 'Scheduled Management Fee' section is visible, with the 'Amount' field highlighted by an orange circle. The field contains the text '£ 0.00'. Other fields in this section include 'Next Fee Date', 'Charge Frequency', and 'Charge When Vacant'. The left sidebar shows various navigation options like 'My day', 'Lettings', 'Sales', 'Accounts', 'Reporting', and 'Communications'. The top navigation bar includes 'iamproperty', 'CRM', 'movebutler', and 'iamsold'.

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If you already have a 'Management Fee' set there will be a warning message to confirm this, edit as required. Click "OK"

The screenshot shows the 'Property Information' panel with a warning dialog box overlaid. The dialog box has an orange exclamation mark icon and the title 'Multiple management fees'. The text inside reads: 'You have entered both a management fee and scheduled management fee. Please confirm you'd like to keep both before saving the property.' There is an 'OK' button at the bottom of the dialog box. The background shows the same 'Scheduled Management Fee' section as in the previous screenshot, but it is dimmed.

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Click the "Next Fee Date" field. This will set the next (first) date the fee is charged.

N.B. If the Next Fee Date is set to a date in the past, the fee will be charged from that date at the frequency set. For example if the date is set 3mths in the past the CRM will create 3 monthly invoices to catch up to the current billing date.

The screenshot displays the CRM interface for a property management system. The top navigation bar includes links for 'iamproperty', 'CRM', 'movebutler', and 'iamsold'. The main menu on the left lists various sections: 'My day', 'Lettings', 'Sales', 'Accounts', 'Reporting', and 'Communications'. The 'Accounts' section is currently active, showing a 'Vendor Vendor10' dropdown and a 'Scheduled Management Fee' section. This section includes fields for 'Amount' (£100.00), 'Next Fee Date' (highlighted with an orange circle), 'Charge Frequency', and 'Charge When Vacant'. Below this, there is an 'OTHER' section with various toggle switches and input fields for 'Alarmed', 'Requires HMO Licence', 'Elect for Rent On Time', 'Landlord Insurance', 'Entry Code', 'HMO Expiry Date', 'Rent On Time End Date', and 'Landlord Insurance Renewal Date'. At the bottom, there is a 'User Defined Fields' section with an 'Estate Name' input field. A calendar for May 2025 is shown at the bottom right, with the 2nd of May highlighted by an orange circle.

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Click the 'Charge Frequency' field and select the frequency you wish to charge the fee from the drop down menu.

The screenshot displays the iamproperty CRM interface. The top navigation bar includes the iamproperty logo, a menu with 'My day', 'Lettings', 'Sales', 'Accounts', 'Reporting', and 'Communications', and user links for 'iamproperty', 'CRM', 'movebutler', and 'iamsold'. A 'My account' button is on the right. The left sidebar contains a list of property-related items. The main content area is divided into sections: 'OTHER' with various toggle switches and input fields, and 'Schedul Management Fee' with fields for 'Amount', 'Next Fee Date', 'Charge Frequency', and 'Charge When Vacant'. The 'Charge Frequency' field is highlighted with an orange circle, showing a dropdown menu with 'Monthly' selected. Below these sections is a 'User Defined Fields' section.

iamproperty CRM movebutler iamsold

property My day Lettings Sales Accounts Reporting Communications

Vendor Vendor10

Schedul Management Fee

Amount £100.00 Next Fee Date 02/06/2025

Charge Frequency Monthly Charge When Vacant

OTHER

Alarmed Entry Code 9563122

Requires HMO Licence HMO Expiry Date

Elect for Rent On Time Rent On Time End Date

Landlord Insurance Landlord Insurance Renewal Date

User Defined Fields

Estate Name

6 There are a variety of 'Charge Frequency' options to select from

Scheduled Management Fee

Amount
£ 100.00

Next Fee Date
02/06/2025 *

Charge Frequency
Monthly ▼

Charge When Vacant ☐

Weekly
Fortnightly
Monthly
End of Month
Four Weekly
Quarterly
Commercial
Half yearly
Yearly



Alert! If the Charge is created in the past, e.g. the charge was created for yesterday or earlier in a month, then the CRM will ;

- Create an invoice on the property ledger:
 - Transaction Type: Agent Fee Invoice
 - Transaction Sub-type: Management Fee
 - Description: Management Fee - [property name]
- Advance the **Next Fee Date** by the amount specified in **Charge Frequency**
- The Agent Fee Invoice will show in the Property Ledger for the date that the charge was created e.g. if charge was created for the 27th May and we are now at the 29th May the charge will show as being raised on the 27th May. The next charge will be raised on the 27th of June

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Click here and set whether the charge is to be made when the property is vacant.
N.B. Pre booked would not count as 'Live'.

The screenshot shows the 'Schedul Management Fee' form in the iamproperty CRM. The form includes a sidebar with navigation links (My day, Lettings, Sales, Accounts, Reporting, Communications) and a top navigation bar with links to iamproperty, CRM, movebutler, and iamsold. The main form area contains several sections: 'Rent amount is exempt from VAT', 'Rent amount is inclusive of VAT', and 'Rent amount is exclusive of VAT'. Below these is the 'OTHER' section with various toggle switches and input fields. The 'Schedul Management Fee' section includes fields for 'Amount' (£100.00), 'Next Fee Date' (02/06/2025), 'Charge Frequency' (Monthly), and 'Charge When Vacant' (toggle switch). An orange circle highlights the 'Charge When Vacant' toggle switch, which is currently turned off.

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Click here to save the charge.

The screenshot shows the 'Schedul Management Fee' form in the iamproperty CRM. The form includes a sidebar with navigation links (My day, Lettings, Sales, Accounts, Reporting, Communications) and a top navigation bar with links to iamproperty, CRM, movebutler, and iamsold. The main form area contains several sections: 'Rent amount is exempt from VAT', 'Rent amount is inclusive of VAT', and 'Rent amount is exclusive of VAT'. Below these is the 'OTHER' section with various toggle switches and input fields. The 'Schedul Management Fee' section includes fields for 'Amount' (£100.00), 'Next Fee Date' (02/06/2025), 'Charge Frequency' (Monthly), and 'Charge When Vacant' (toggle switch). An orange circle highlights the 'Save Changes' button at the bottom right of the form.

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Once saved, if the charge was created in the 'past' it will automatically charge the fee