

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.

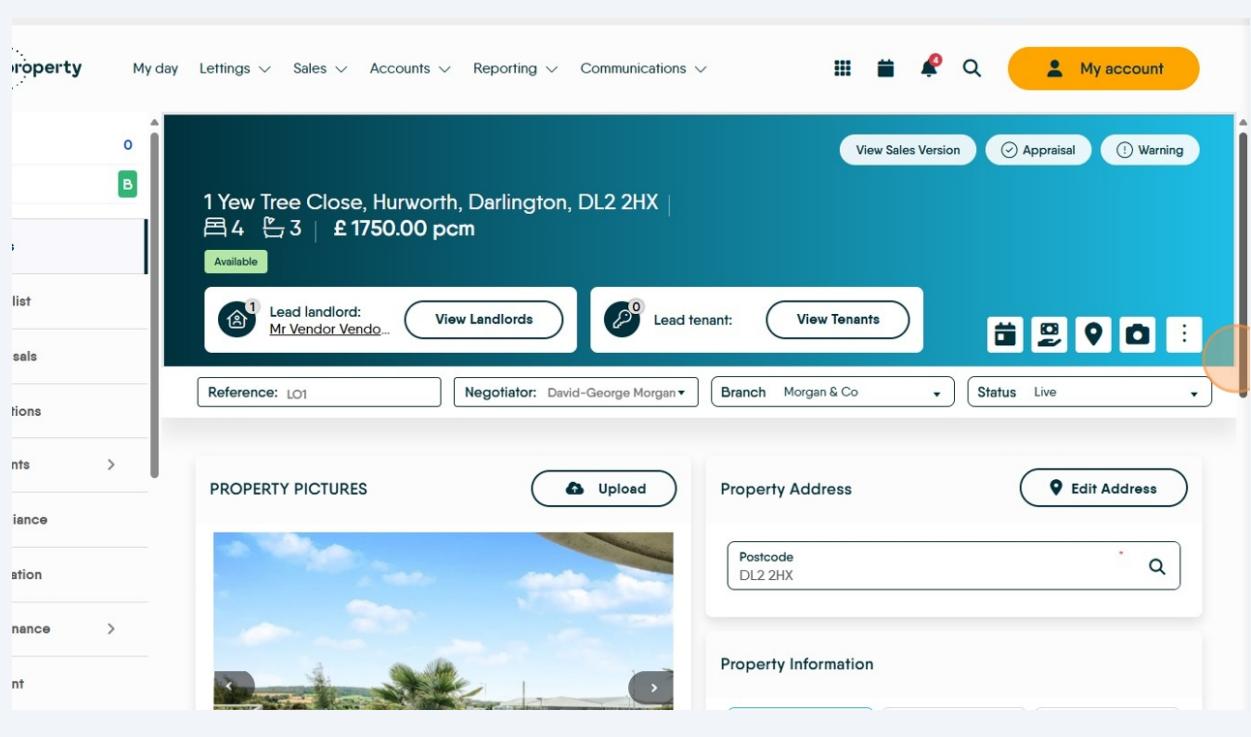
From this guide Users will learn how to set the amount, frequency, and next charge date.



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

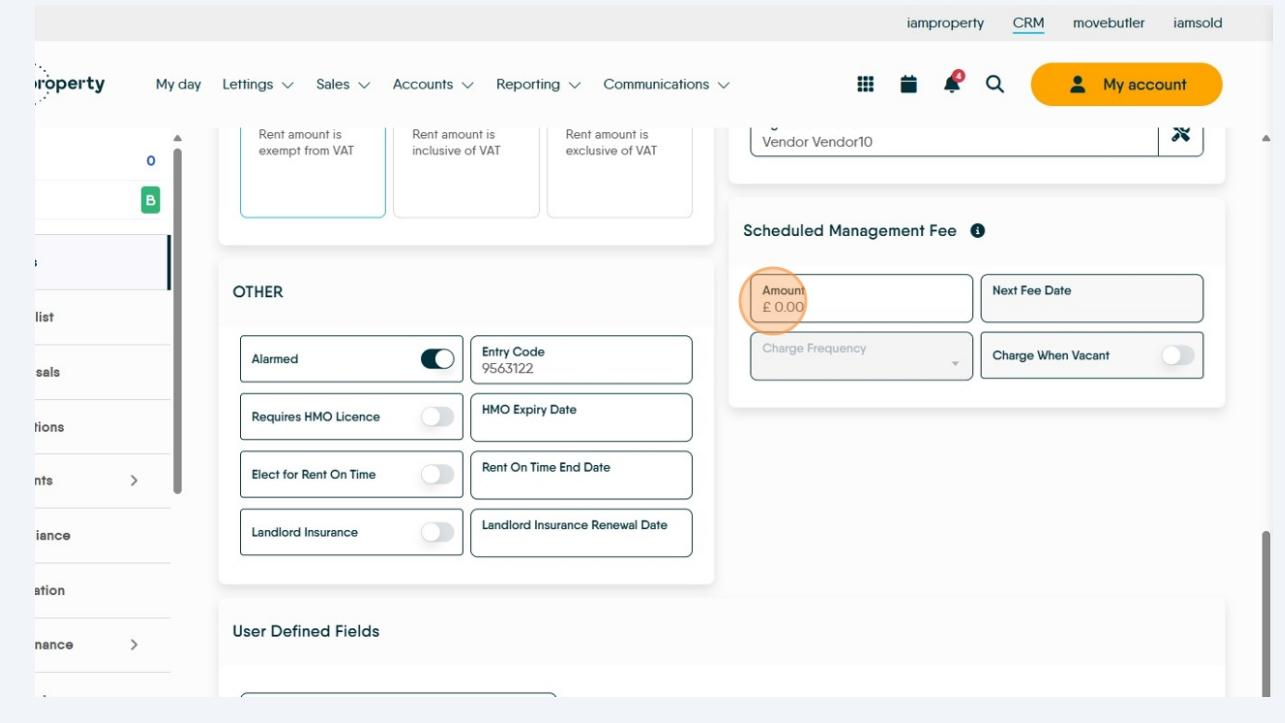
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1 Navigate to the property you want to create the Scheduled Management fee for.



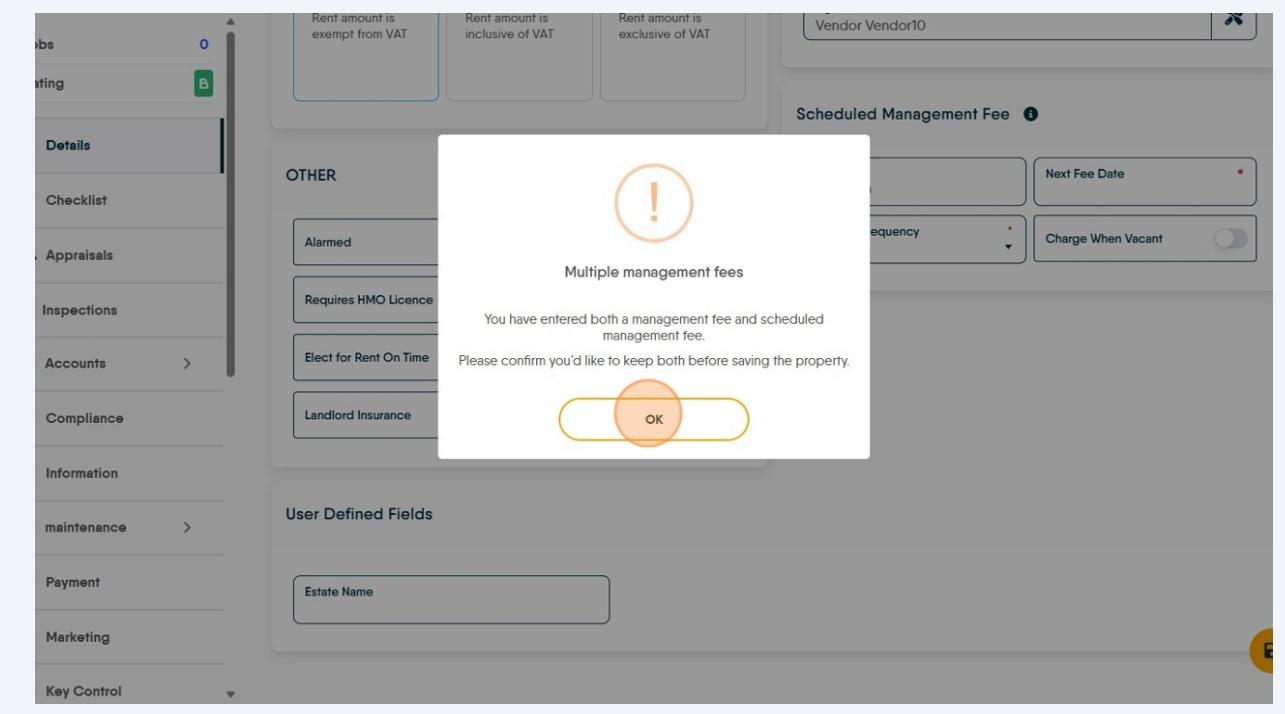
2 Scroll down the screen, on the left side under the 'Property Information' panel, you will see the Scheduled Management Fee.

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



The screenshot shows the 'Property' tab selected in the navigation bar. On the left, there's a sidebar with various tabs like 'My day', 'Lettings', 'Sales', 'Accounts', 'Reporting', and 'Communications'. The main content area shows 'OTHER' settings for a property. On the right, there's a 'Scheduled Management Fee' section. The 'Amount' field, which contains '£ 0.00', is highlighted with a red circle. Other fields in this section include 'Next Fee Date', 'Charge Frequency', and 'Charge When Vacant'. The top right of the screen has links for 'iamproperty', 'CRM', 'movebutler', and 'iamsold', along with a 'My account' button.

3 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 same software interface as the previous one, but with a modal dialog box in the foreground. The dialog has a large exclamation mark icon and the text 'Multiple management fees'. It explains that both a management fee and a scheduled management fee have been entered. A message at the bottom asks for confirmation to keep both fees before saving. An 'OK' button is at the bottom of the dialog, also highlighted with a red circle. The background of the interface is dimmed, and the sidebar on the left is visible.

4

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 shows the iamsold CRM interface with the 'CRM' tab selected. The main area displays a property record for 'Vendor Vendor10'. The 'Scheduled Management Fee' section is highlighted, showing the following details:

- Amount: £100.00
- Next Fee Date: **26/05/2025** (highlighted with a red circle)
- Charge Frequency: Monthly (highlighted with a red circle)
- Charge When Vacant: Off

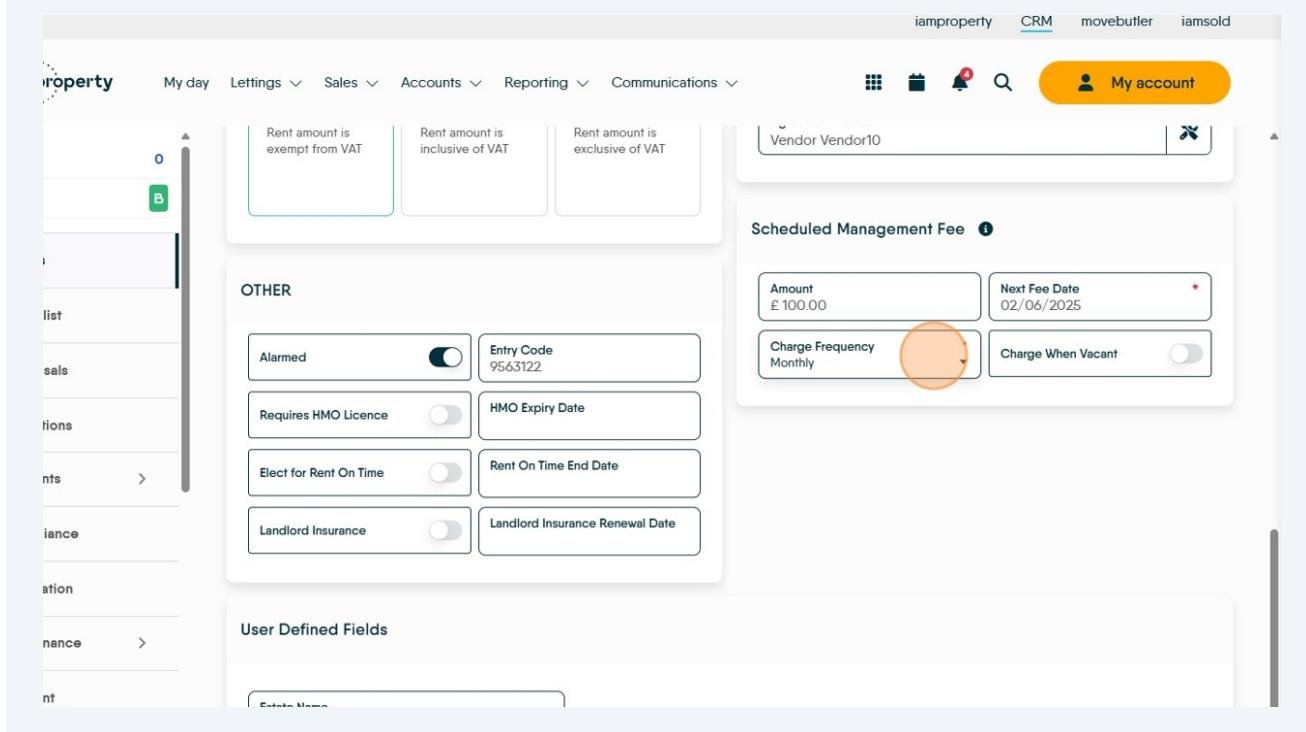
The 'OTHER' section contains the following fields:

- Alarmed: On
- Entry Code: 9563122
- Requires HMO Licence: Off
- HMO Expiry Date: (empty)
- Elect for Rent On Time: Off
- Rent On Time End Date: (empty)
- Landlord Insurance: Off
- Landlord Insurance Renewal Date: (empty)

The 'User Defined Fields' section contains a single field: Estate Name.

5

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



The screenshot shows the iamsold software interface. At the top, there are navigation links: iamproperty, CRM (which is underlined), movebutler, and iamsold. Below the navigation, there are icons for a grid, a file, a bell with a red notification dot, a magnifying glass, and a user profile with the text 'My account'. The main content area is titled 'Property' and shows a list of properties. On the right, there is a sidebar with sections for 'OTHER' and 'User Defined Fields'. In the 'OTHER' section, there are several toggle switches and text inputs. The 'Charge Frequency' field is highlighted with an orange circle. The 'Charge Frequency' dropdown menu is open, showing options like 'Monthly', 'Quarterly', 'Semi-annually', and 'Annually'. The 'Amount' field is set to £100.00 and the 'Next Fee Date' is 02/06/2025. The 'Charge When Vacant' toggle switch is off.

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

Scheduled Management Fee i

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

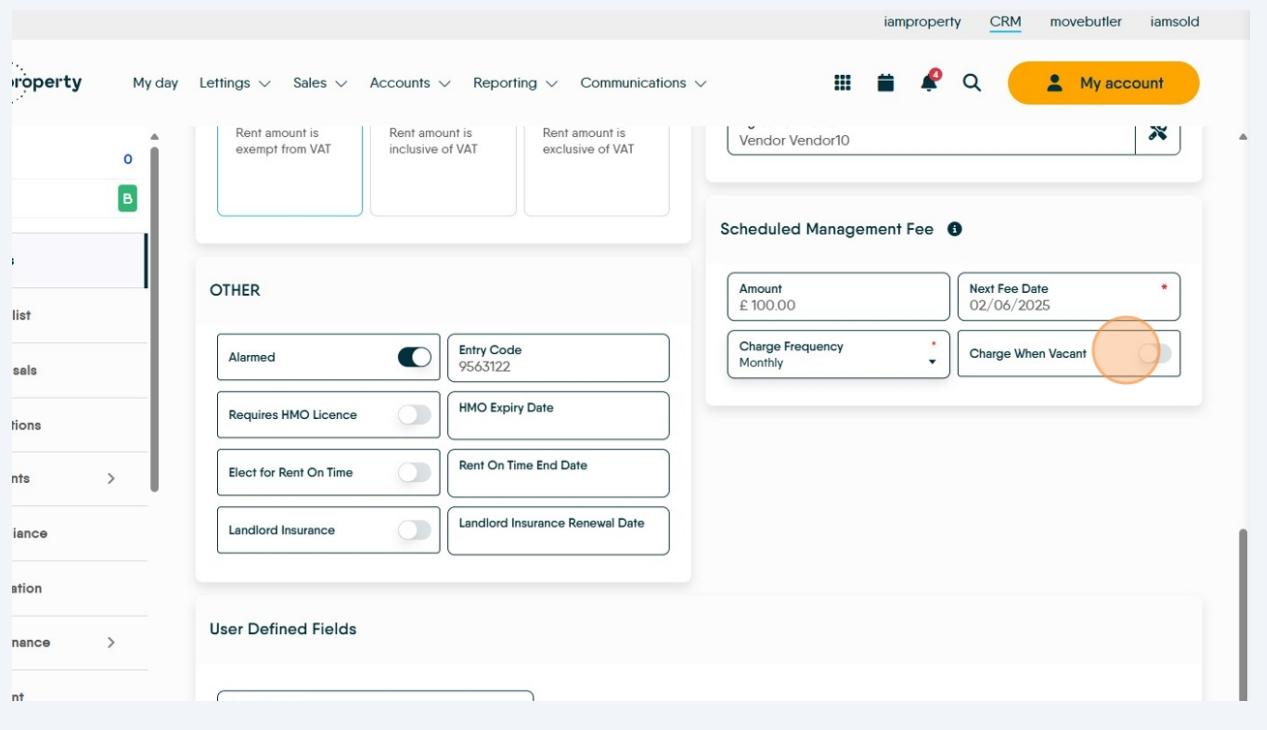


Alert! If the Charge is created in the past, e.g. the charge was created for yesterday or earlier in a month, then the CRM will ;

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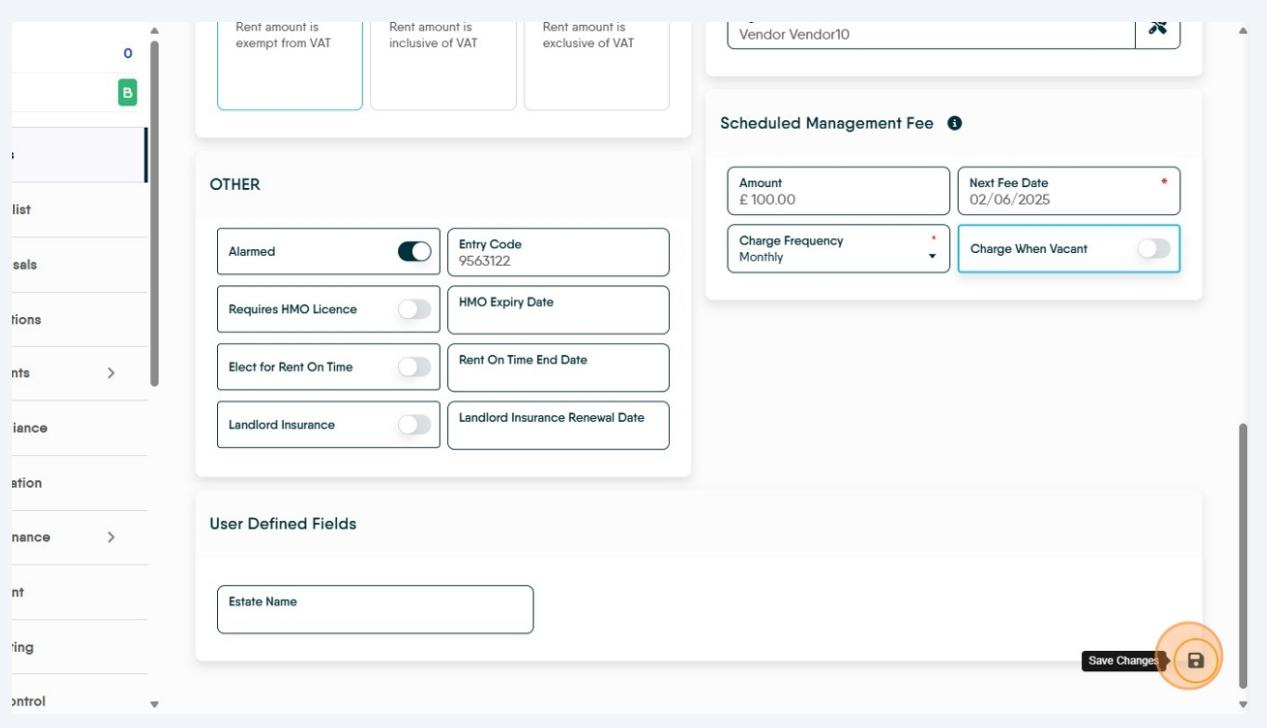
Click here and set whether the charge is to be made when the property is vacant.
N.B. Pre booked would not count as 'Live'.



The screenshot shows the 'Scheduled Management Fee' configuration. The 'Charge When Vacant' checkbox is currently unchecked (grey). The 'Amount' is set to £100.00 and the 'Next Fee Date' is 02/06/2025. The 'Charge Frequency' is set to 'Monthly'. The 'OTHER' section includes toggles for 'Alarmed', 'Requires HMO Licence', 'Elect for Rent On Time', and 'Landlord Insurance', each with an associated entry code or date field.

8

Click here to save the charge.



The screenshot shows the software interface after changes have been made. The 'Charge When Vacant' checkbox is now checked (blue). The 'Save Changes' button is highlighted with an orange circle at the bottom right of the screen.

9

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