

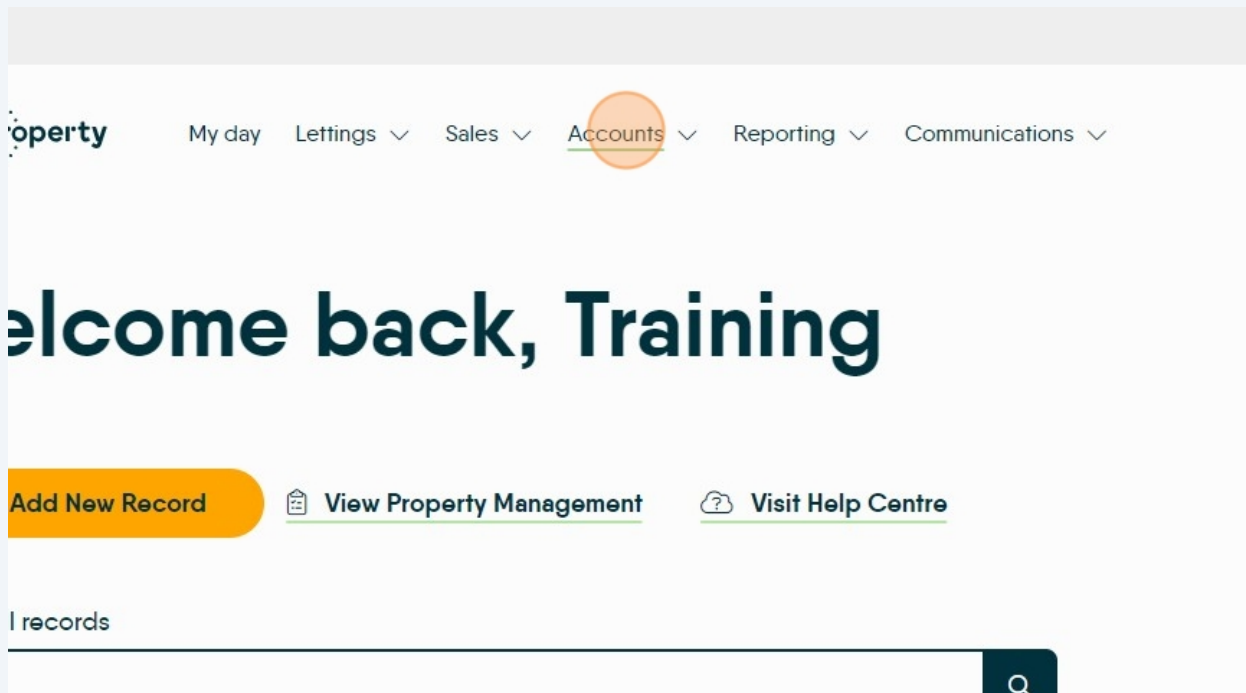
Collecting Rent in CRM



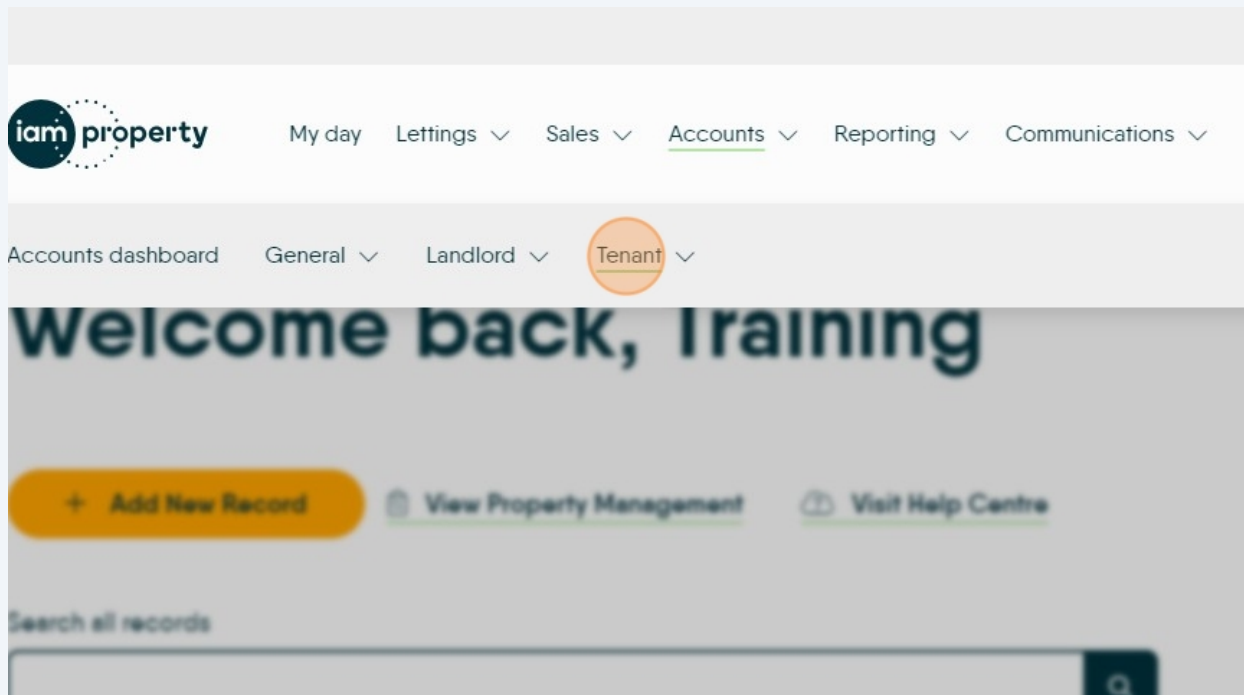
This guide offers a straightforward method for property managers to efficiently collect rent from tenants using a CRM system. This guide shows how to collect a full and a part rent.

- 1 Navigate to <https://crm.iamproperty.com/MyDay>

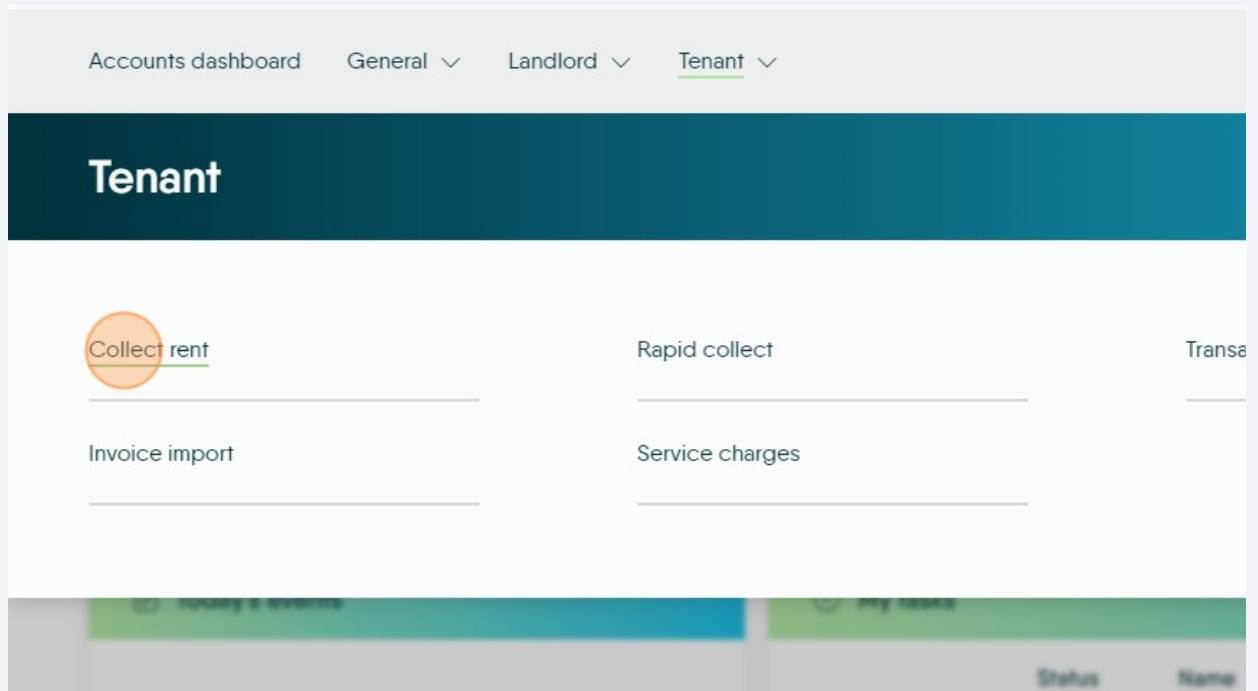
- 2 Click "Accounts"



3 Click "Tenant"



4 Click "Collect Rent"



5

Click "Select Tenant"

Click on the Tenant that you wish to collect the rent for. All tenants with an unpaid rent invoice will show in this list, Live, Pre Booked and Archived, so overdue and long term debt can be collected here.

Collect Rent

Total

Unallocated Funds

Deposit Balance

Tenant

Select Tenant

Collection date *

21/11/2024

Amount *

£ 0.00

Use deposit

Account *

Morgan& Co Client Account

Transaction type

Tenant Bank

Description

Enter description

Bank reference

Enter bank

OUTSTANDING INVOICES

Total

Unallocated Funds

Deposit Balance

Tenant

Select Tenant

Mark Wahlberg - £2000.00 - 40 Moor Avenue, Witney - MWahlberg40Moor

Lettings Applicant101 - £1600.00 - 729 Pelaw Crescent, Chester le Street - No E

Lettings Applicant88 - £1300.00 - 122 Pelaw Crescent, Chester le Street - No E

Leonard Reeks - £1200.00 - 355 Yew Tree Close, Hurworth, Darlington - No Bar

Vendor Vendor10 - £1200.00 - 359 Yew Tree Close, Hurworth, Darlington - No E

Lettings Applicant88 - £1200.00 - 711 Pelaw Crescent, Chester le Street - No B

No outstanding invoices

6 Click this checkbox.

21/11/2024 £ 0.00

Account
Morgan& Co Client Account

Description
Enter description

Transaction 1
Tenant Bank

Bank referer
Enter bank

OUTSTANDING INVOICES

<input type="checkbox"/>	Date	Type	Amount	Outstand
<input checked="" type="checkbox"/>	15/11/2024	Rent Invoice	£ 1,600.00	£ 1,600.0

7 Click "Collect"

Bank reference
Enter bank ref.

Cheque no.
Enter cheque no.

Amount	Outstanding	Description	Days Overdue
£ 1,600.00	£ 1,600.00	Mr lettings Applicant10...	6

1 to 1 of 1 < > Page 1 of 1 > >|

Another Collect & Perform Payment Collect

8 Click "No"

Collection date 21/11/2024

Amount

Use deposit

Use unallo

Account Morgan& Co Client Account

Description Mr Lettings Applicant101 (15/11/2024)

Sub type BACS Tran

Cheque no Enter che

Would you like to produce a tenant receipt?

No Yes

OUTSTANDING INVOICES

<input checked="" type="checkbox"/>	Date	Type
<input checked="" type="checkbox"/>	15/11/2024	Rent Invo

1 to 1 of 1

9 To receipt a part payment.

21/11/2024

£ 1,300.00

Account Morgan& Co Client Account

Transaction type Tenant Bank

Description Sir Lettings Applicant88 (01/11/2024 - 30/11/2024)

Bank reference Enter bank

OUTSTANDING INVOICES

<input checked="" type="checkbox"/>	Date	Type	Amount	Outstanding
<input checked="" type="checkbox"/>	01/11/2024	Rent Invoice	£ 1,300.00	£ 1,300.00

- 10 Click the "Amount" field. Enter the amount you are collecting.

Collect Rent

Total
Unallocated Funds
Deposit Balance

Tenant
• Lettings Applicant88 - £1300.00 - 122 Pelaw Crescent, Chester le Street - No Bank Ref.

Collection date 21/11/2024 * Amount £ 1,300.00 * Use deposit ☐ Use u

Account Morgan& Co Client Account * Transaction type Tenant Bank Receipt * Sub t BACs

Description Sir Lettings Applicant88 (01/11/2024 - 30/11/2024) Bank reference Enter bank ref. Chec Enter

OUTSTANDING INVOICES

<input checked="" type="checkbox"/>	Date	Type	Amount	Outstanding	Description
<input checked="" type="checkbox"/>	01/11/2024	Rent Invoice	£ 1,300.00	£ 1,300.00	Sir Lettings Applicant88 (01/11/2024 - 30/11/2024)

- 11 Click the 'Outstanding' field. Type the amount you are collecting

£ 1,000.00

Account * Transaction type Tenant Bank Receipt * Sub type BACS Transfer *

Applicant88 (01/11/2024 - 30/11/2024) Bank reference Enter bank ref. Cheque no. Enter cheque no.

INVOICES

Type	Amount	Outstanding	Description	Days Overdue
Rent Invoice	£ 1,300.00	1300	Sir Lettings Applicant88 (01/11/2024...	20

1 to 1 of 1 |< < Page 1 of 1 > >|

12 Click "Collect"

Bank reference
Enter bank ref.

Cheque no.
Enter cheque no.

Amount	Outstanding	Description	Days Overdue
£ 1,300.00	1000	Sir Lettings Applicant88 (01/11/2024...	20

1 to 1 of 1 |< < Page 1 of 1 > >|

Another

Collect & Perform Payment

Collect

13 Click "No"

Collection date
21/11/2024

Account
Morgan& Co Client Account

Description
Sir Lettings Applicant88 (01/11/2024...

OUTSTANDING INVOICES

✓	Date	Type
✓	01/11/2024	Rent Invoice

Amount

Use deposit

Use unallc

Sub type
BACS Tra

Cheque n
Enter ch

?

Would you like to produce a tenant receipt?

No

Yes

1 to 1 of 1 |< < Page 1 of 1 > >|

14

If you check back to the Tenant entry in Collect rent you will see the Outstanding Payment.

21/11/2024	£ 0.00		
Account Morgan& Co Client Account	Transaction type Tenant Bank Receipt	Sub type BACS Transfe	
Description Enter description	Bank reference Enter bank ref.	Cheque no. Enter chequ	

OUTSTANDING INVOICES					
<input type="checkbox"/>	Date	Type	Amount	Outstanding	Description
<input type="checkbox"/>	01/11/2024	Rent Invoice	£ 1,300.00	£ 300.00	Sir Lettings Applicant88 (01/11/2024... 20

1 to 1 of 1 < < Page 1