

Collecting Rent in CRM



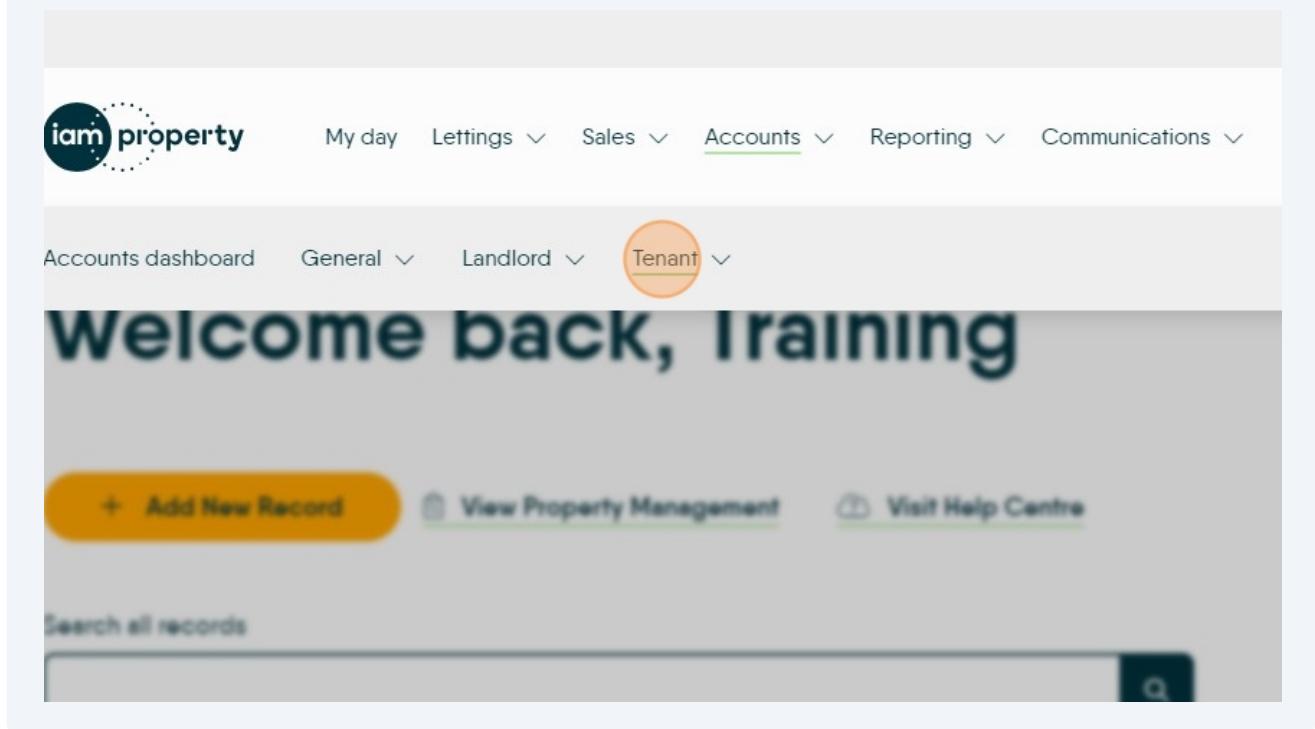
This guide offers a straightforward method for property managers to efficiently collect rent from tenants using a CRM system. This guide shows how to collect a full and a part rent.

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

- 2 Click "Accounts"

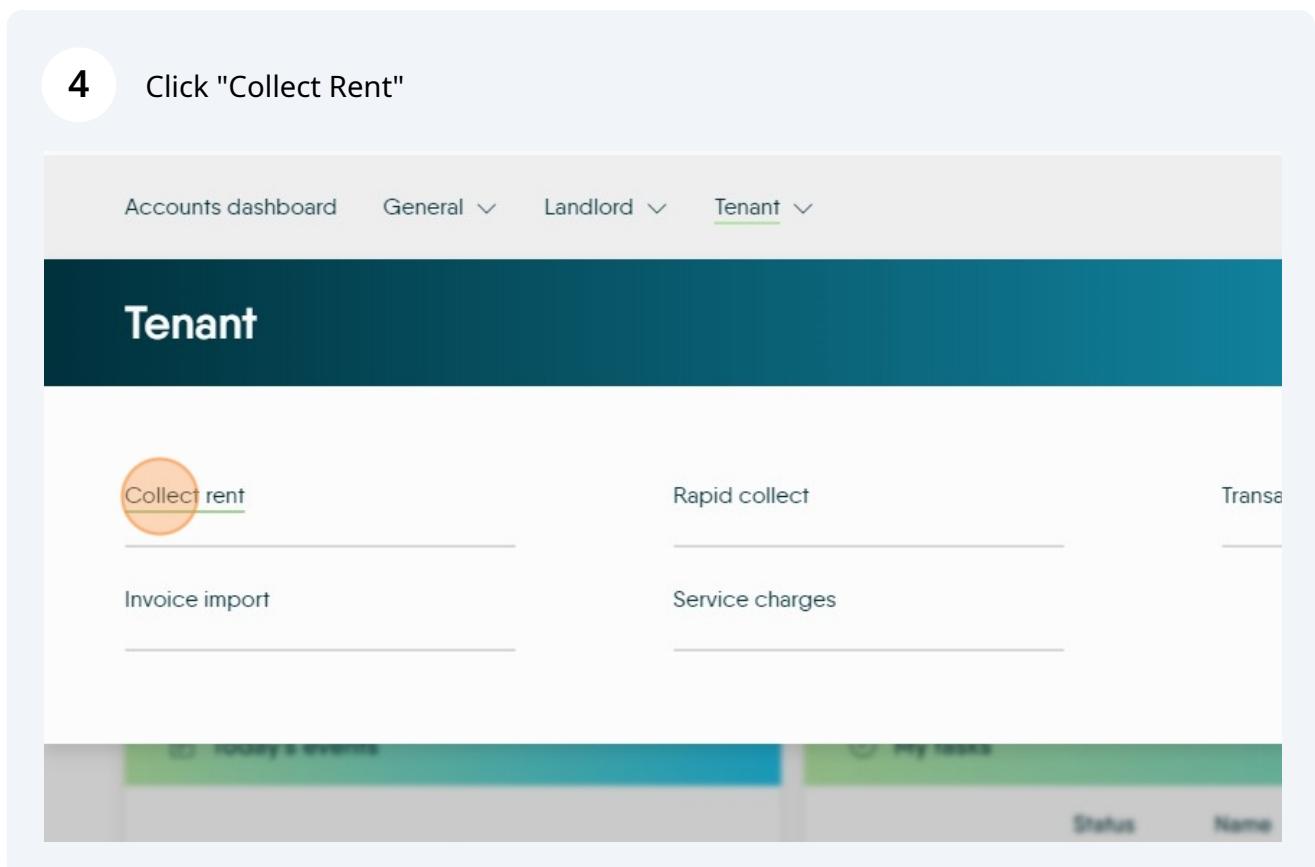
A screenshot of the iam property CRM interface. At the top, there is a navigation bar with the 'property' logo on the left and menu items: 'My day', 'Lettings', 'Sales', 'Accounts' (which is highlighted with a red oval), 'Reporting', and 'Communications'. Below the navigation bar, the main content area has a large, bold, dark blue header that says 'Welcome back, Training'. Underneath the header, there are three buttons: 'Add New Record' (orange), 'View Property Management' (green), and 'Visit Help Centre' (blue). A status bar at the bottom shows '1 records' and a search icon.

3 Click "Tenant"



The screenshot shows the iam property software interface. At the top, there is a navigation bar with links: My day, Lettings, Sales, Accounts (underlined), Reporting, and Communications. Below the navigation bar, a secondary navigation bar shows: Accounts dashboard, General, Landlord, and Tenant (with a dropdown arrow). The main content area features a large, bold "Welcome back, Training" message. Below this, there are three buttons: "Add New Record" (yellow), "View Property Management" (light blue), and "Visit Help Centre" (light blue). A search bar with a magnifying glass icon is at the bottom. The overall layout is clean and modern.

4 Click "Collect Rent"



The screenshot shows the Tenant section of the software. The top navigation bar is identical to the previous screenshot, with the Tenant link underlined. The main content area has a dark teal header with the word "Tenant" in white. Below the header, there are several buttons: "Collect rent" (highlighted with an orange circle), "Rapid collect", "Transa", "Invoice import", and "Service charges". At the bottom, there is a table with columns for "Status" and "Name".

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 1
Tenant Bank

Description
Enter description

Bank referer
Enter bank

OUTSTANDING INVOICES

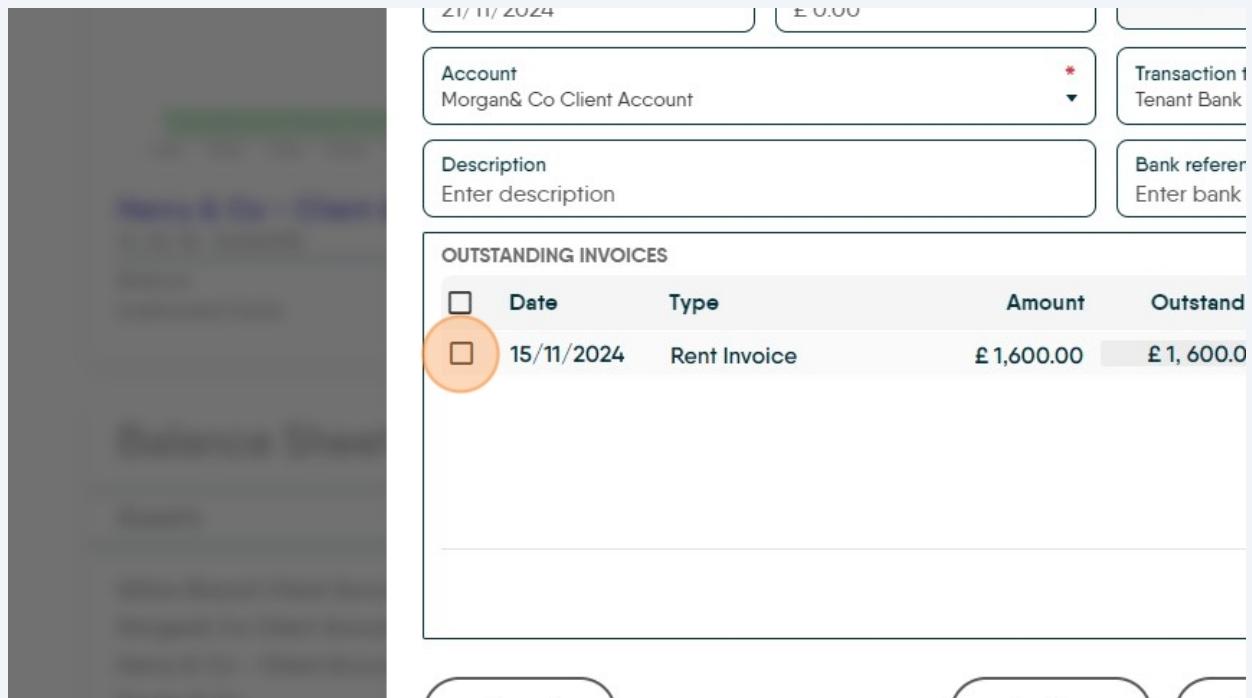
Total
Unallocated Funds
Deposit Balance

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 B
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

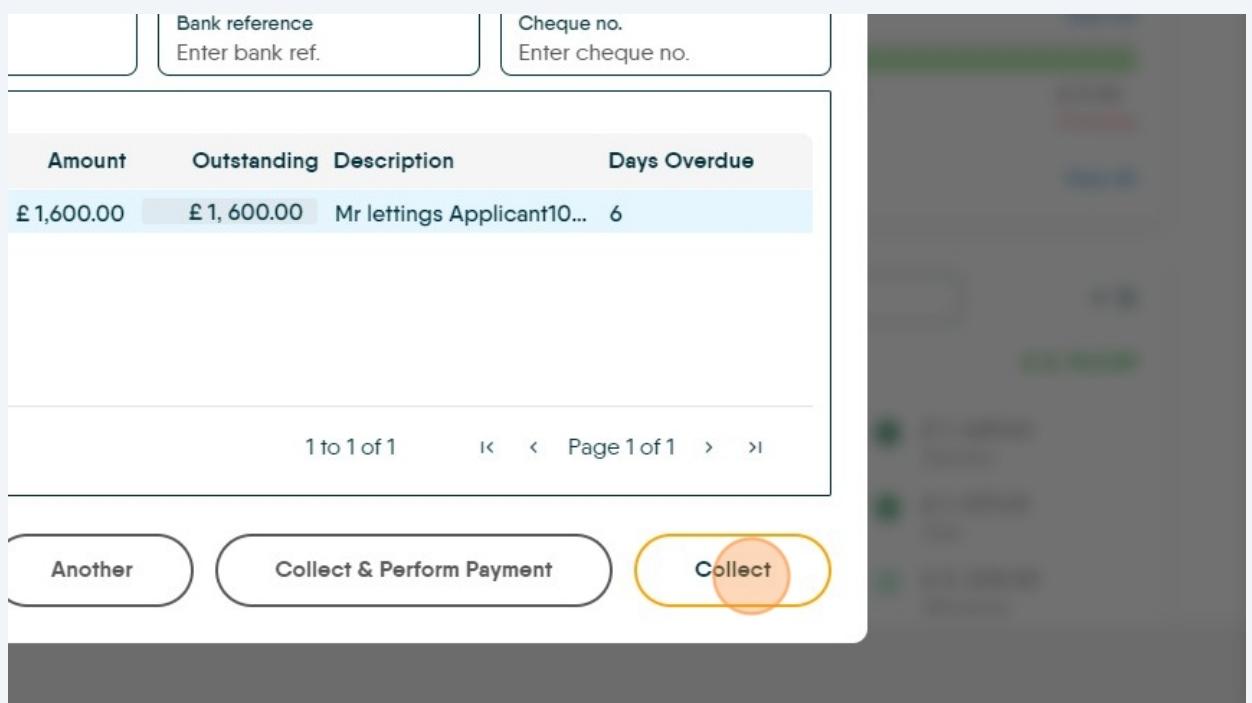
Account: Morgan & Co Client Account * Transaction 1
Tenant Bank

Description: Enter description Bank referrer
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"



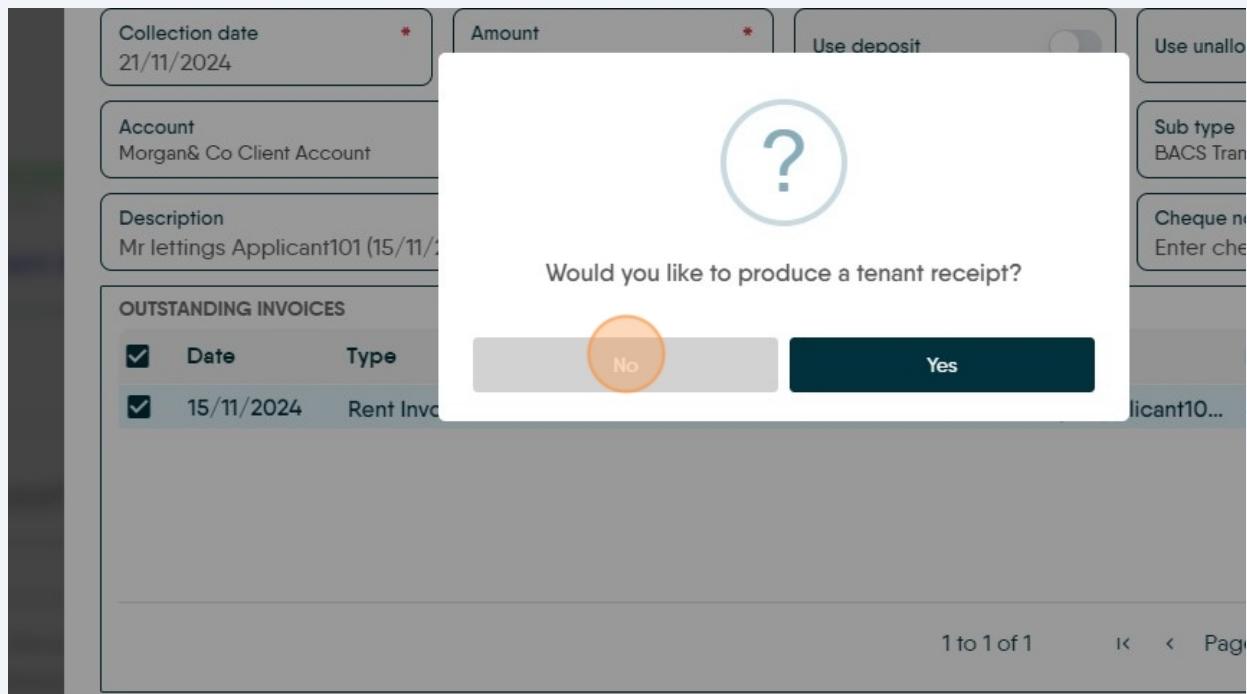
Bank reference: Enter bank ref. Cheque no.: Enter cheque no.

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

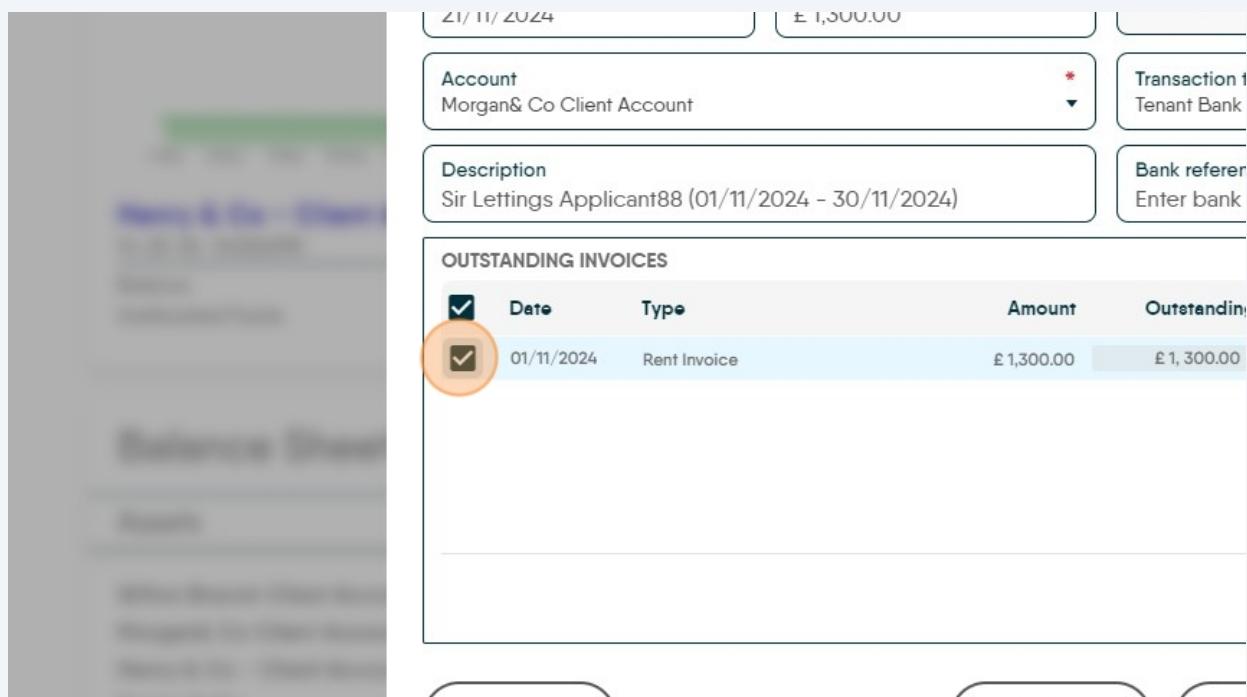
1 to 1 of 1 < Page 1 of 1 > >1

Another Collect & Perform Payment Collect

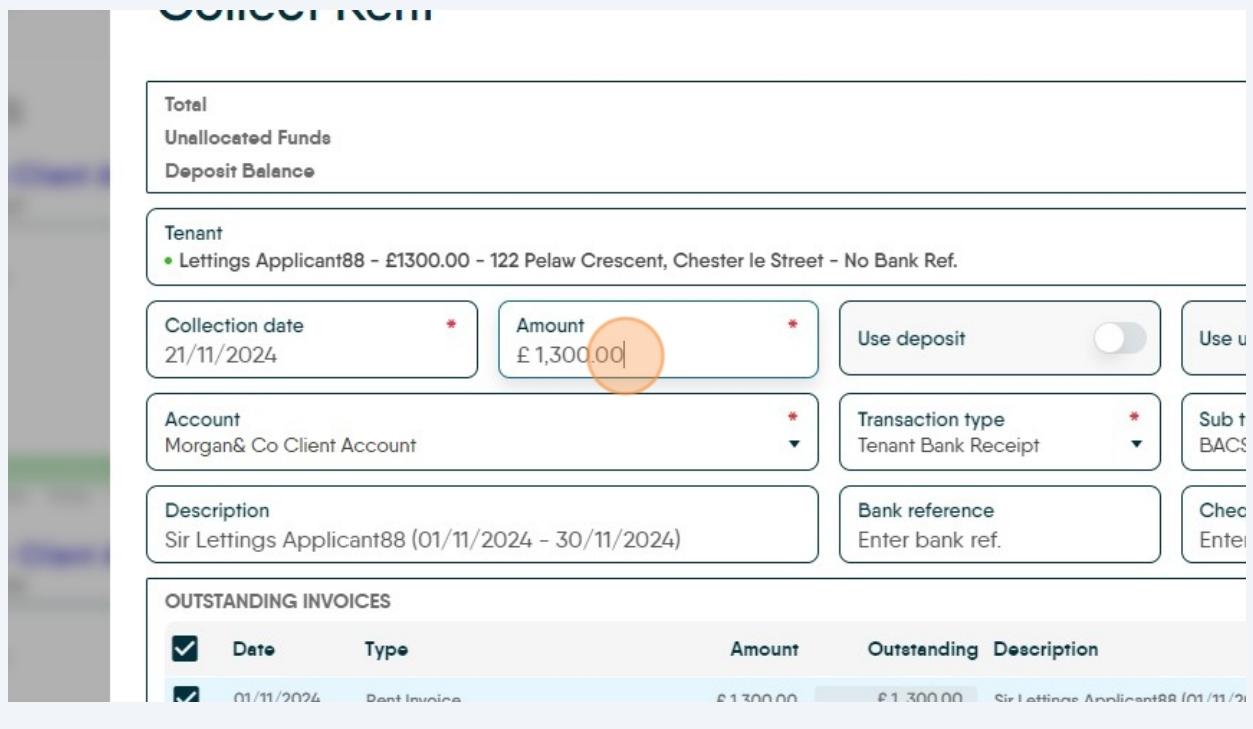
8 Click "No"



9 To receipt a part payment.

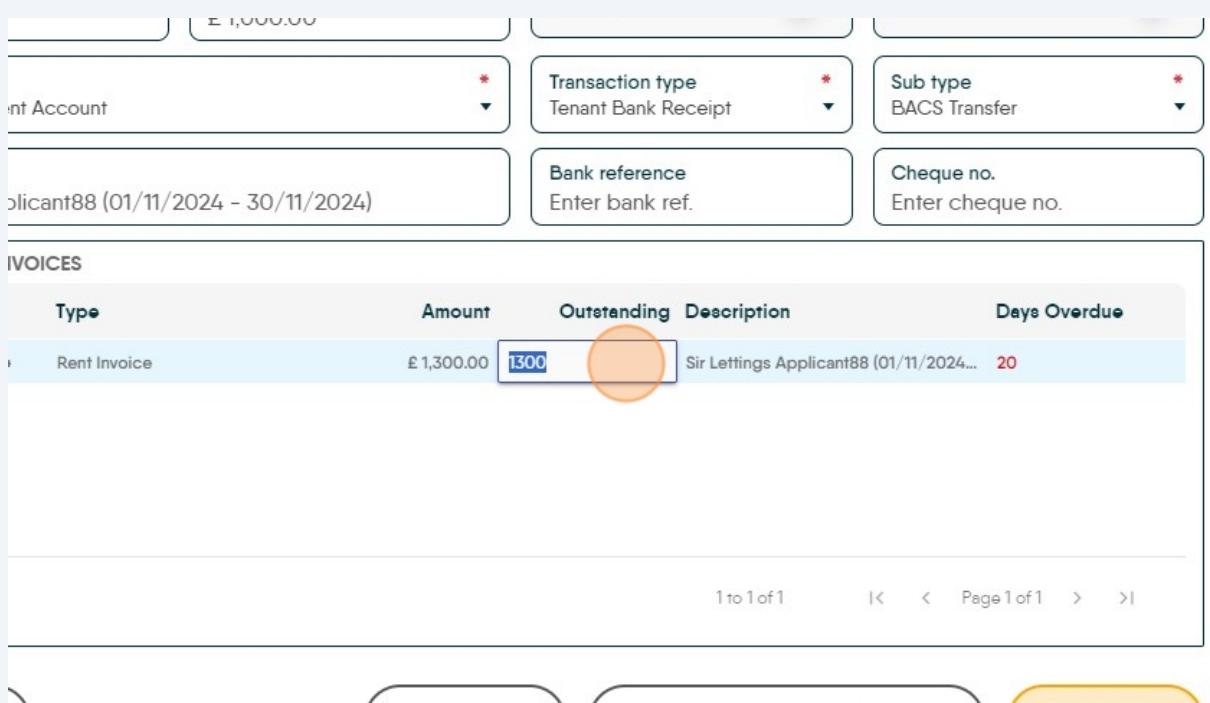


10 Click the "Amount" field. Enter the amount you are collecting.



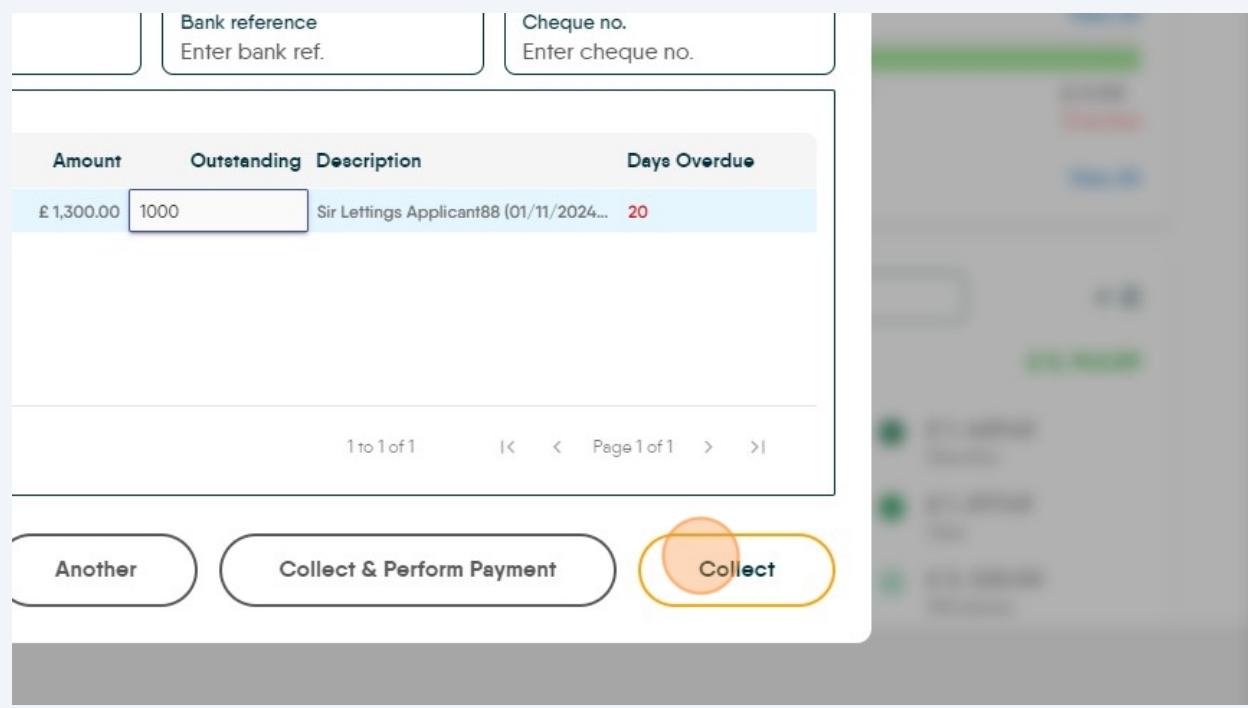
The screenshot shows a software interface for managing financial transactions. At the top, there are three buttons: 'Total', 'Unallocated Funds', and 'Deposit Balance'. Below this, a 'Tenant' section lists 'Lettings Applicant88 - £1300.00 - 122 Pelaw Crescent, Chester le Street - No Bank Ref.'. The main form area contains several input fields: 'Collection date' (21/11/2024), 'Amount' (£1,300.00), 'Use deposit' (toggle switch), 'Account' (Morgan& Co Client Account), 'Transaction type' (Tenant Bank Receipt), 'Description' (Sir Lettings Applicant88 (01/11/2024 - 30/11/2024)), 'Bank reference' (Enter bank ref.), and 'Cheque no.' (Enter cheque no.). Below this is a table titled 'OUTSTANDING INVOICES' with columns: 'Date', 'Type', 'Amount', 'Outstanding', and 'Description'. It shows one entry: '01/11/2024', 'Rent Invoice', '£ 1,300.00', '£ 1,300.00', and 'Sir Lettings Applicant88 (01/11/2024 - 30/11/2024)'.

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



The screenshot shows a software interface for managing financial transactions. At the top, there are three buttons: 'Total', 'Unallocated Funds', and 'Deposit Balance'. Below this, a 'Tenant' section lists 'Lettings Applicant88 - £1300.00 - 122 Pelaw Crescent, Chester le Street - No Bank Ref.'. The main form area contains several input fields: 'Account' (Morgan& Co Client Account), 'Transaction type' (Tenant Bank Receipt), 'Sub type' (BACS Transfer), 'Description' (Sir Lettings Applicant88 (01/11/2024 - 30/11/2024)), 'Bank reference' (Enter bank ref.), and 'Cheque no.' (Enter cheque no.). Below this is a table titled 'INVOICES' with columns: 'Type', 'Amount', 'Outstanding', 'Description', and 'Days Overdue'. It shows one entry: 'Rent Invoice', '£ 1,300.00', '1300', 'Sir Lettings Applicant88 (01/11/2024... 20'. At the bottom, there is a page navigation bar with '1 to 1 of 1', '<', '>', and 'Page 1 of 1'.

12 Click "Collect"



Bank reference
Enter bank ref.

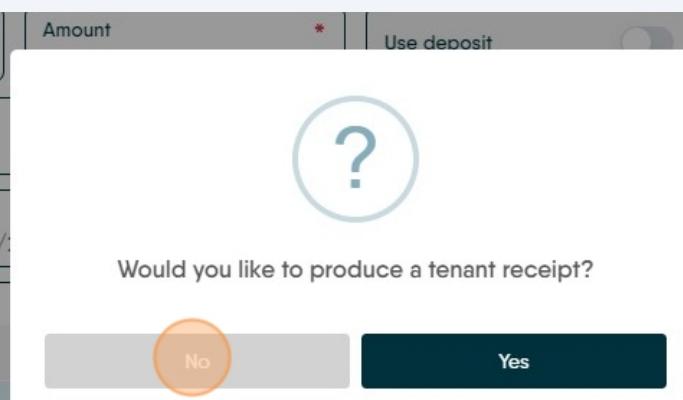
Cheque no.
Enter cheque no.

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

Amount * Use deposit

Use unalloc

Account
Morgan & Co Client Account

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

OUTSTANDING INVOICES

<input checked="" type="checkbox"/>	Date	Type
<input checked="" type="checkbox"/>	01/11/2024	Rent Invoice

Would you like to produce a tenant receipt?

No **Yes**

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

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

The screenshot shows a software interface for managing tenant payments. At the top, there are fields for 'Date' (01/11/2024) and 'Amount' (£ 0.00). Below these are three dropdown menus: 'Account' (Morgan& Co Client Account), 'Transaction type' (Tenant Bank Receipt), and 'Sub type' (BACS Transfer). Further down are fields for 'Description' (Enter description), 'Bank reference' (Enter bank ref.), and 'Cheque no.' (Enter cheque). A section titled 'OUTSTANDING INVOICES' displays a table with one row. The table columns are 'Date', 'Type', 'Amount', 'Outstanding', and 'Description'. The row shows '01/11/2024', 'Rent Invoice', '£1,300.00', '£ 300.00', and 'Sir Lettings Applicant88 (01/11/2024... 2024)'. The amount '£1,300.00' is highlighted with an orange circle. At the bottom of the table, there are buttons for '1 to 1 of 1', 'Page 1', and navigation arrows.

Date	Type	Amount	Outstanding	Description
01/11/2024	Rent Invoice	£1,300.00	£ 300.00	Sir Lettings Applicant88 (01/11/2024... 2024)