

# Creating a Rent Invoice for a Tenant



This guide provides a straightforward step-by-step process for creating a rent invoice for a tenant. By following the instructions, users can efficiently generate invoices without confusion, ensuring accurate billing.



Alert! Rent Invoices are created AUTOMATICALLY in the CRM from the Tenant record, based on the rent amount, rent due date and rent period.

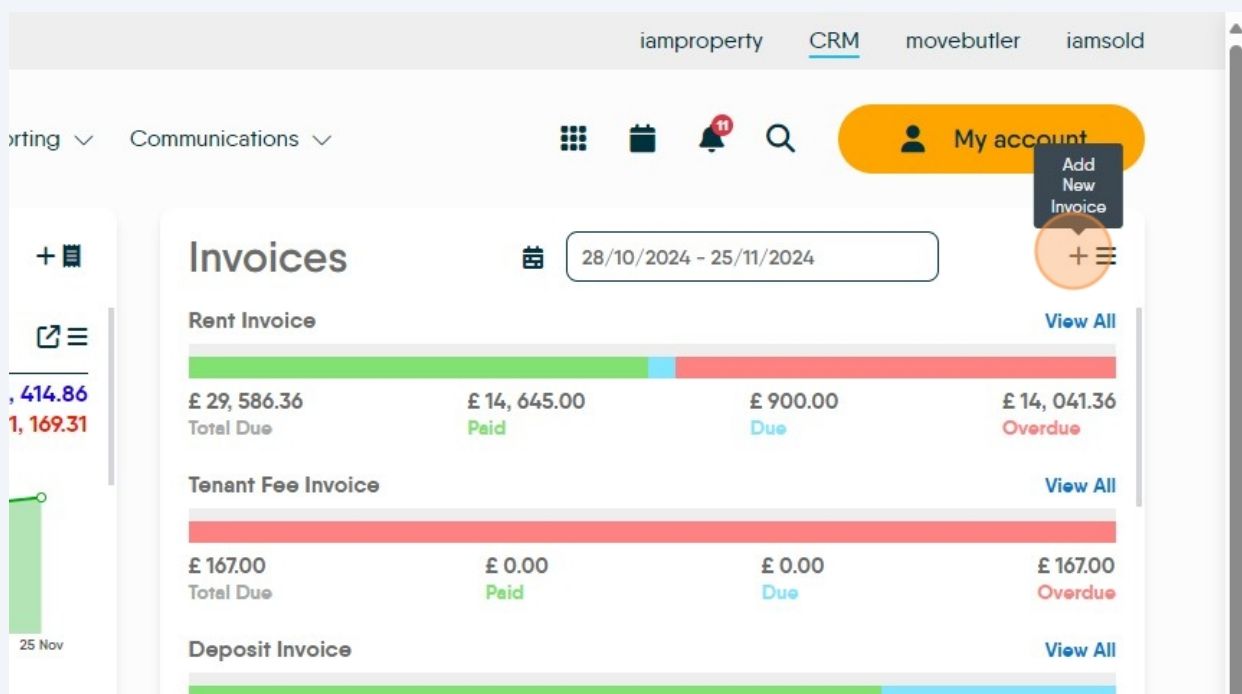
A monthly rent invoice DOES NOT have to be created, this process would only be for ad hoc rent invoices.

1

Navigate to <https://crm.iamproperty.com/Dashboards/Accounts>

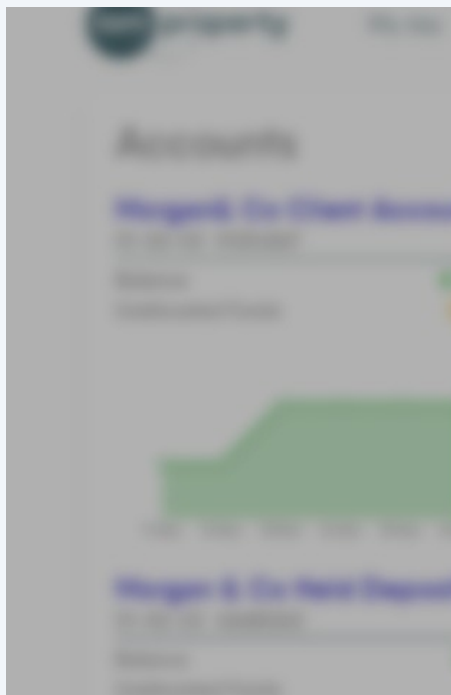
2

On the Invoices tile. Click here.



3

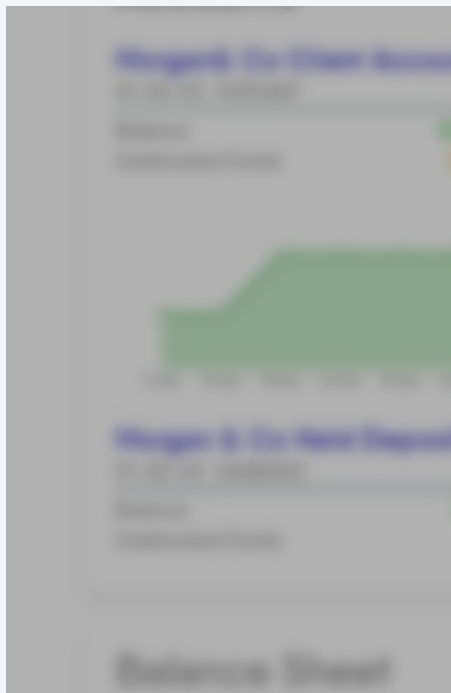
Click "Select tenant" type tenants name and select from the list




## Add Invoice


Deposit Balance	£ 0.00	Pay with dep
Unallocated Funds	£ 0.00	Pay with una

<b>Tenant</b> Select tenant	<b>Transaction type</b> Select transaction type
<input type="text"/>	<input type="text"/>
Please enter 3 or more characters	
£	£ 0.00
<b>Description</b> Enter description	
<b>Invoices</b>	



Deposit Balance	£ 0.00	Pay with dep
Unallocated Funds	£ 0.00	Pay with una

<b>Tenant</b> Select tenant	<b>Transaction type</b> Select transaction type
applicant99	<input type="text"/>
	<input type="text"/>
	Vat £ 0.00
<b>Description</b> Enter description	
<b>Invoices</b>	



4

Click "Select transaction type"  
Click "Rent Invoice"

# Add Invoice

Deposit Balance £ 0.00		Pay with deposit <input type="checkbox"/>	
Unallocated Funds £ 0.00		Pay with unallocated <input type="checkbox"/>	
Tenant Lettings Applicant99 - 359 Yew Tree	Transaction type Select transaction type	Sub type Select sub-type	
Invoice date 25/11/2024	Invoice no CRM - 4		Exclude man. fee <input type="checkbox"/>
Amount £	Net £ 0.00		Total £ 0.00
Description Enter description	Rent Invoice		
	Tenant Fee Invoice		
	Deposit Invoice		
	Service Charge Invoice		
	Landlord Service Charge Invoice		

Deposit Balance £ 0.00		Pay with deposit <input type="checkbox"/>	
Unallocated Funds £ 0.00		Pay with unallocated <input type="checkbox"/>	
Tenant Lettings Applicant99 - 359 Yew Tree	Transaction type Select transaction type	Sub type Select sub-type	
Invoice date 25/11/2024	Invoice no CRM - 4		Exclude man. fee <input type="checkbox"/>
Amount £	Net £ 0.00		Total £ 0.00
Description Enter description	Rent Invoice		
	Tenant Fee Invoice		
	Deposit Invoice		
	Service Charge Invoice		
	Landlord Service Charge Invoice		
Invoices			Total

- 5 This will pre fill the screen with the Rent details for that tenant and property.

Deposit Balance £ 0.00		Pay with deposit <input type="checkbox"/>	
Unallocated Funds £ 0.00		Pay with unallocated <input type="checkbox"/>	
Tenant Lettings Applicant99 - 359 Yew Tree	Transaction type Rent Invoice	Sub type Residential Rent	
Daily rent amount £ 42.62	Start date 25/11/2024	End date (inclusive) 25/12/2024	No. of days 31
Invoice date 25/11/2024	Invoice no. CRM - 424	Vat type Exempt	Exclude man. fee <input type="checkbox"/>
Amount £ 1,321.31	Net £ 1,321.31	Vat £ 0.00	Total £ 1,321.31
Description Lettings Applicant99 (25/11/2024 - 25/12/2024)			
Invoices			Total £ 0.00

- 6 If required the Invoice amount can be edited. To edit the timescale of the invoice, either change the end date or change the number of days.

The CRM will update the description, the management fee can be included or excluded from the transaction by selecting the on screen option.

Deposit Balance £ 0.00		Pay with deposit <input type="checkbox"/>	
Unallocated Funds £ 0.00		Pay with unallocated <input type="checkbox"/>	
Tenant Lettings Applicant99 - 359 Yew Tree	Transaction type Rent Invoice	Sub type Residential Rent	
Daily rent amount £ 42.62	Start date 25/11/2024	End date (inclusive) 25/12/2024	No. of days 31
Invoice date 25/11/2024	Invoice no. CRM - 424	Vat type Exempt	Exclude man. fee <input type="checkbox"/>
Amount £ 1,321.31	Net £ 1,321.31	Vat £ 0.00	Total £ 1,321.31
Description Lettings Applicant99 (25/11/2024 - 25/12/2024)			
Invoices			Total £ 0.00

- 7 If there is any held deposit or Unallocated funds on the account there will be the option to pay the invoice (all or part) using these funds.

### Add Invoice ✕

Deposit Balance £ 0.00

Unallocated Funds £ 600.00

Pay with deposit ☐

Pay with unallocated ☒

Tenant  
Audrey Morgan - Flat 14 Westpoint, Nc

Transaction Type  
Rent Invoice

Sub Type  
Residential Rent

Daily Rent Amount  
£ 24.65

Start Date  
24/02/2025

End Date (Inclusive)  
26/03/2025

No. of Days  
31

- 8 Once the information is correct, click here to create the Invoice.

End date (inclusive)  
05/12/2024

No. of days  
10

Vat type  
Exempt

Exclude man. fee ☐

Vat  
£ 0

Total  
£ 426.2

24)

✕

+

Total  
£ 0.00

!

No Invoices

Add

9 Click "OK"

The screenshot shows a summary table with the following data:

VAT Type	Net	VAT	Total	Descripti...	Exclude
Exempt	£ 426.20	£ 0.00	£ 426.20	Lettings Ap...	✖

Below the table, there are three buttons: "Cancel", "Another", and "Ok". The "Ok" button is highlighted with an orange circle.

10 There will be an option to create a Tenant Invoice, select Yes/No as required.

The screenshot shows a modal dialog with a question mark icon and the text "Would you like to produce a tenant invoice?". Below the question, there are two buttons: "No" (highlighted with an orange circle) and "Yes".

In the background, there is a table with the following data:

Inv	Date	Invoice No.	Type	VAT Type	Net	VAT	Total	Descripti...	
✖	✓	25/11/2024	CRM - 424	Rent Invoice	Exempt	£ 426.20	£ 0.00	£ 426.20	Lettings Ap...