

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

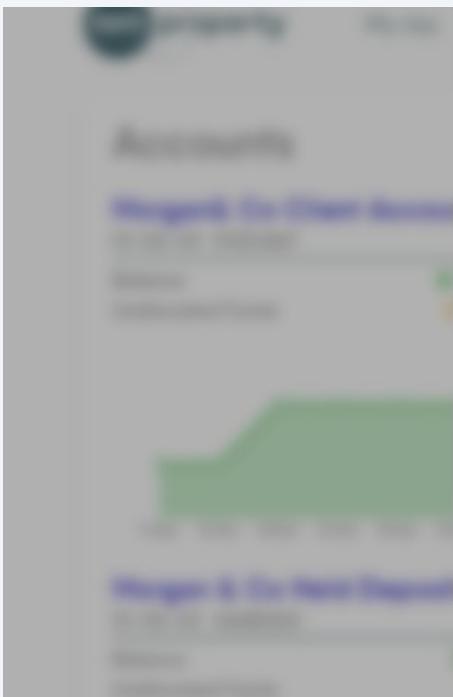
Navigate to <https://crm.iampoperty.com/Dashboards/Accounts>

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

Unallocated Funds £ 0.00

Pay with dep
Pay with una

Tenant *
Select tenant

Please enter 3 or more characters

Transaction type *
Select transaction type

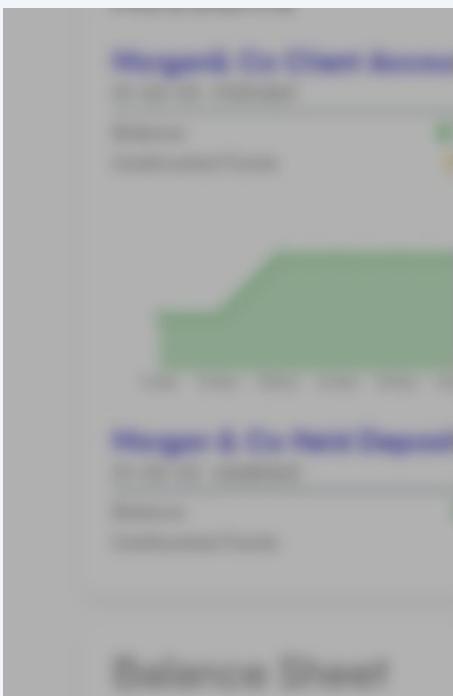
Trans. no. - 424

Vat type

Vat £ 0.00

Description
Enter description

Invoices



Deposit Balance £ 0.00

Unallocated Funds £ 0.00

Pay with dep
Pay with una

Tenant *
Select tenant

applicant99

PB Lettings Applicant99 - 359...

Transaction type *
Select transaction type

Trans. no. - 424

Vat type

Vat £ 0.00

Description
Enter description

Invoices

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 Crv	*	Transaction type Select transaction type	*
Invoice date 25/11/2024	*	Invoice no CRM - 4	
Amount £	*	Net £ 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 Crv	*	Transaction type Select transaction type	*
Invoice date 25/11/2024	*	Invoice no CRM - 4	
Amount £	*	Net £ 0.00	
Description Enter description		Rent Invoice	
Invoices		Tenant Fee Invoice	
		Deposit Invoice	
		Service Charge Invoice	
		Landlord Service Charge Invoice	
		Total	£ 0.00

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	<input type="checkbox"/>
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) * X +			
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	<input type="checkbox"/>
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) * X +			
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 Add

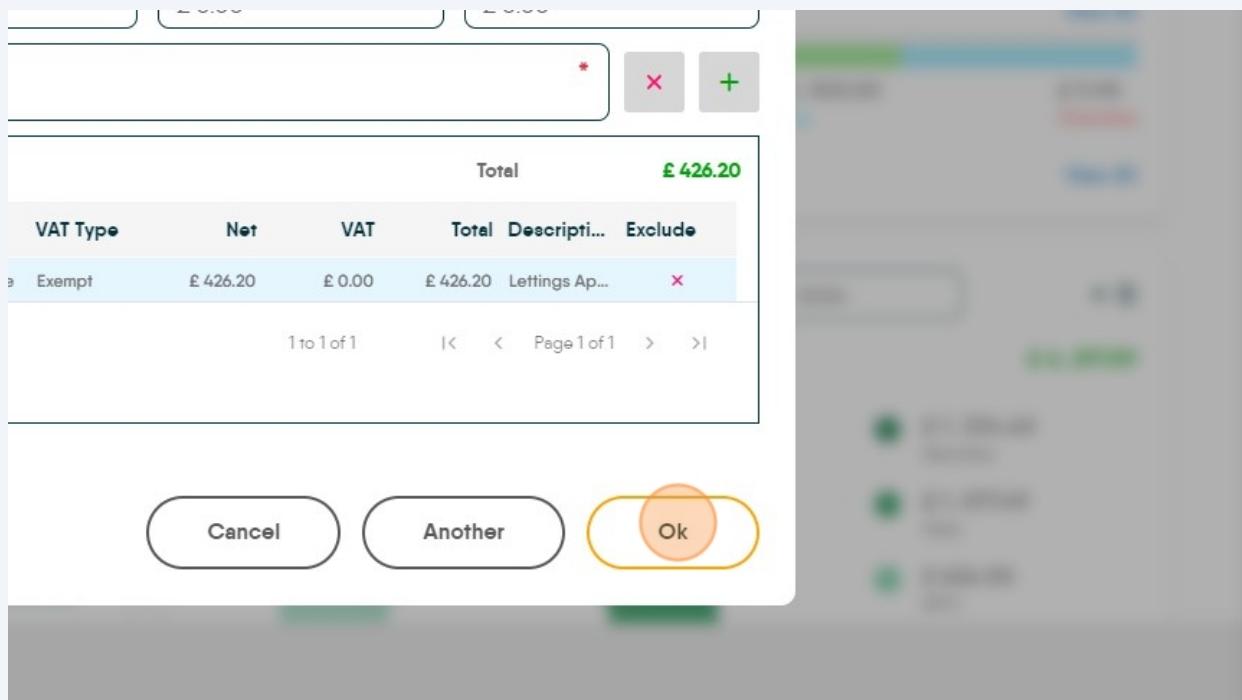
(24) *

Total £ 0.00

!

No Invoices

9 Click "OK"



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

