

Adding Service Charges for Tenants



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

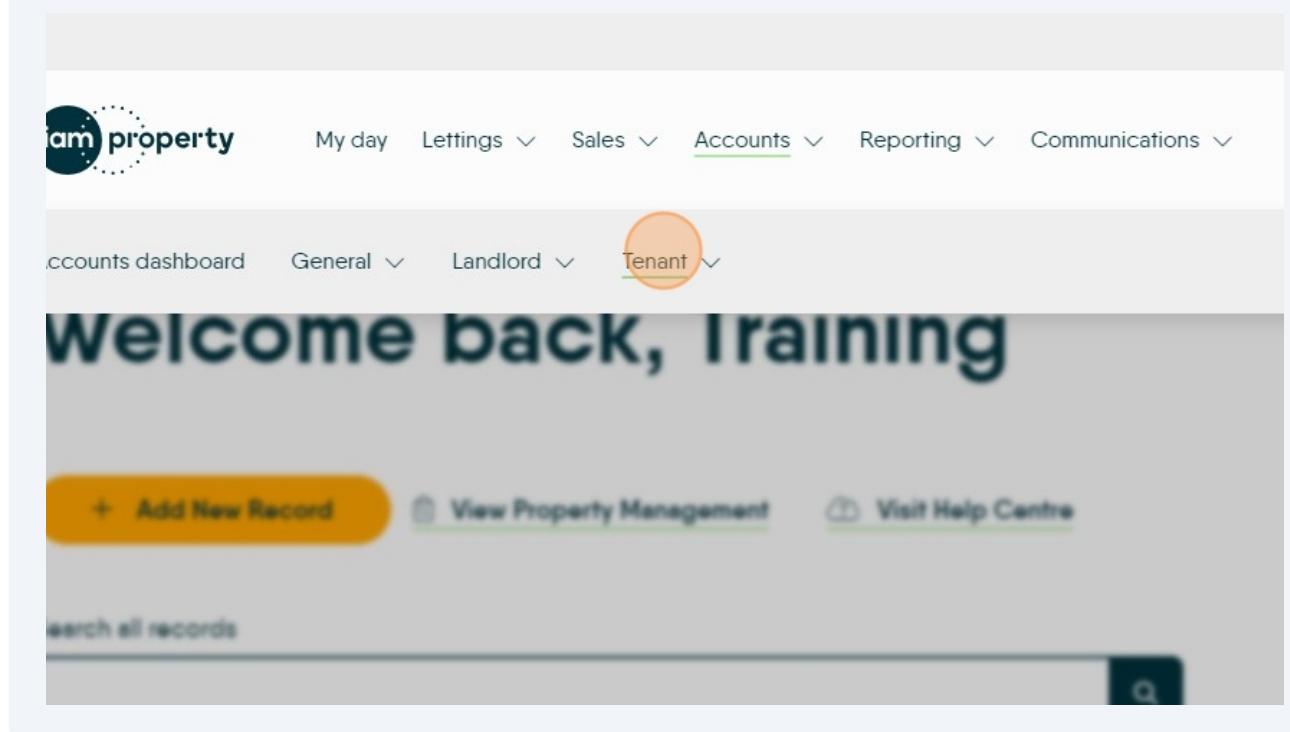


Tip! Depending on the option you select, this process can either be a 'Service Charge' which will go to the Agent or a 'Landlord Service charge' which will be paid to the property/landlord.

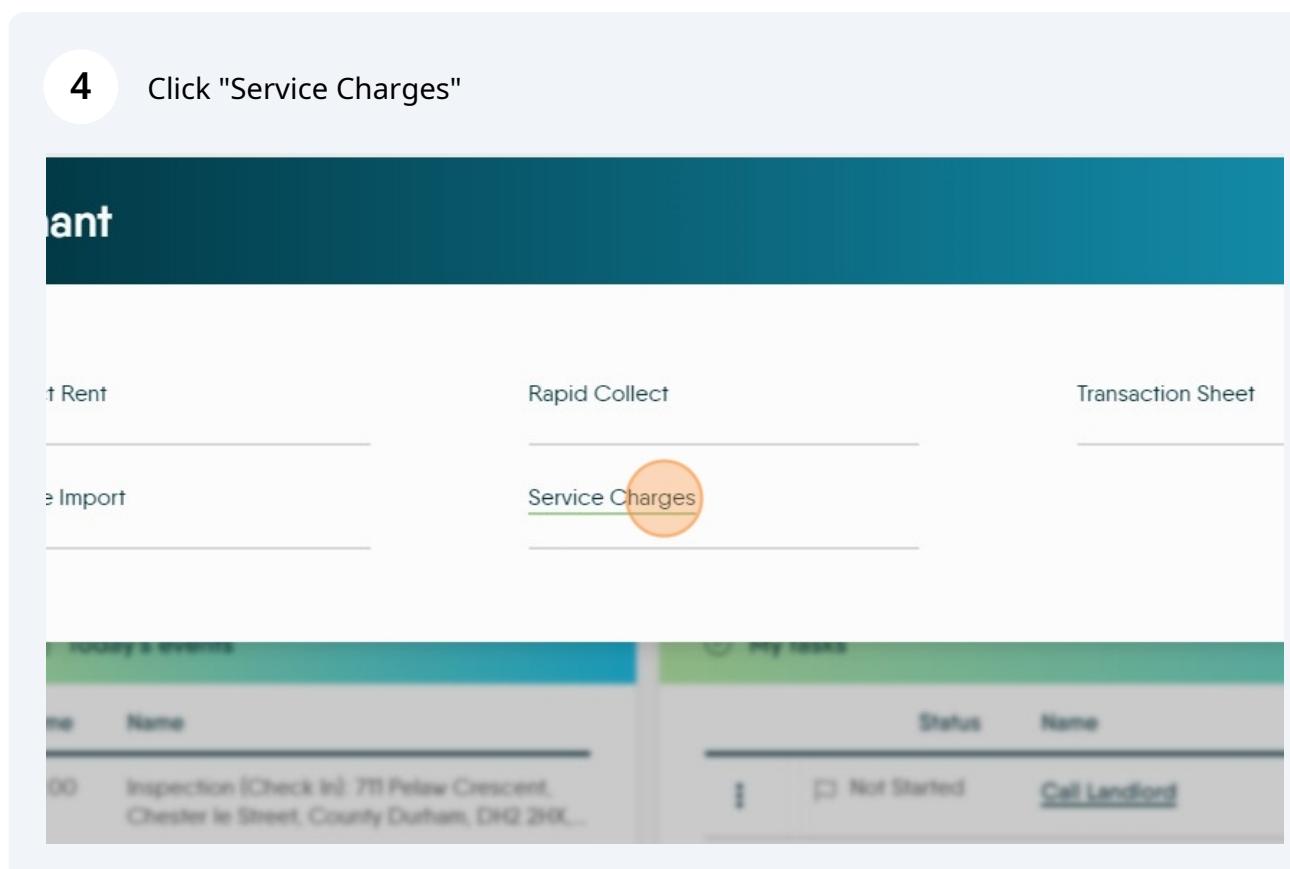
- 2 Click "Accounts"

A screenshot of the iam property CRM interface. The top navigation bar includes links for "My day", "Lettings", "Sales", "Accounts" (which is highlighted with a red oval), "Reporting", and "Communications". Below the navigation, a large, bold, dark blue header says "elcome back, Training". Underneath the header are three buttons: "Add New Record" (orange), "View Property Management" (green), and "Visit Help Centre" (blue). A link "all records" is visible above a search bar with a magnifying glass icon.

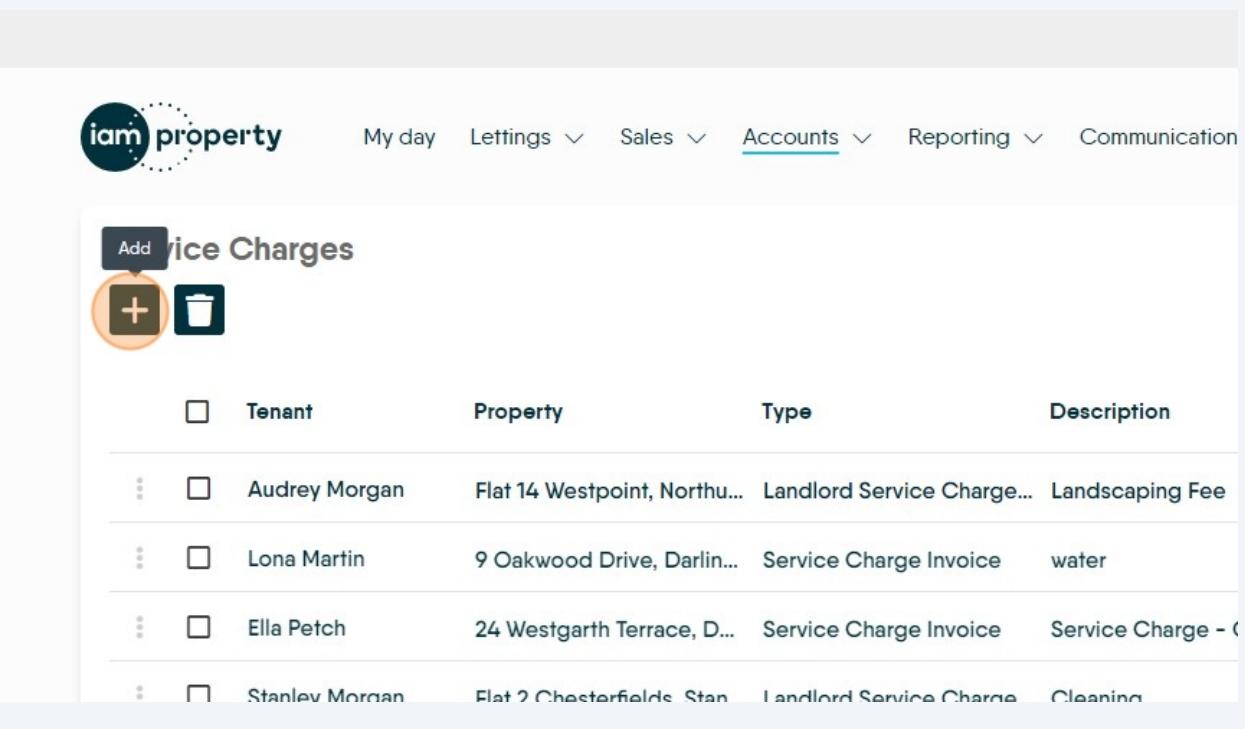
3 Click "Tenant"



4 Click "Service Charges"



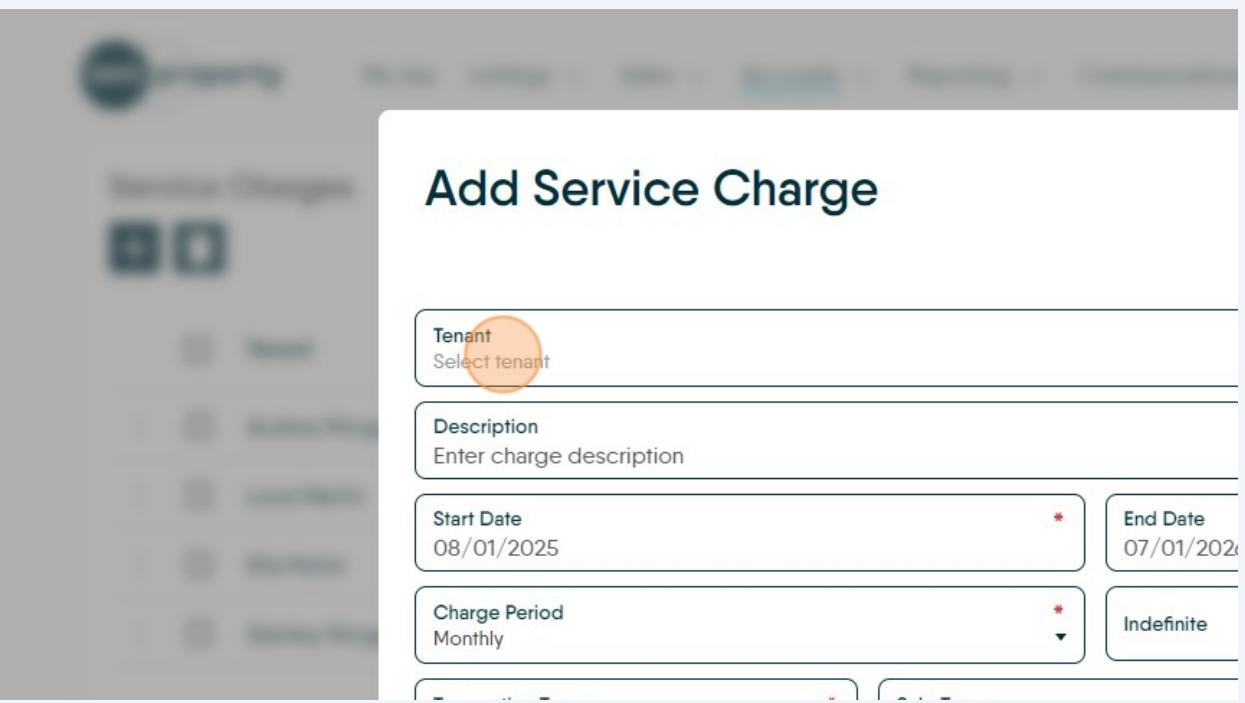
5 Click here to create the Service Charge.



Add Service Charges

<input type="checkbox"/>	Tenant	Property	Type	Description
<input type="checkbox"/>	Audrey Morgan	Flat 14 Westpoint, Northu...	Landlord Service Charge...	Landscaping Fee
<input type="checkbox"/>	Lona Martin	9 Oakwood Drive, Darlin...	Service Charge Invoice	water
<input type="checkbox"/>	Ella Petch	24 Westgarth Terrace, D...	Service Charge Invoice	Service Charge - C
<input type="checkbox"/>	Stanley Morgan	Flat 2 Chesterfields Stan...	Landlord Service Charge	Cleaning

6 Click "Select tenant" and search for the specific tenant you are charging or,



Add Service Charge

Tenant
Select tenant

Description
Enter charge description

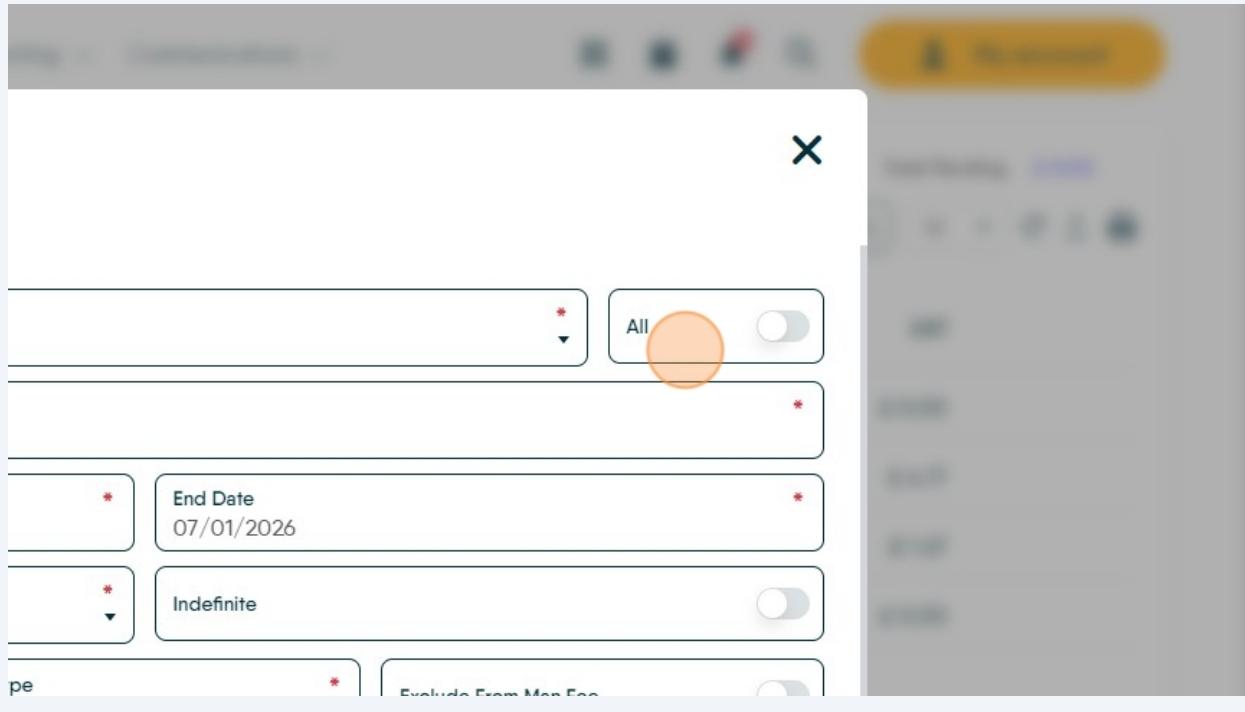
Start Date * 08/01/2025

End Date 07/01/2025

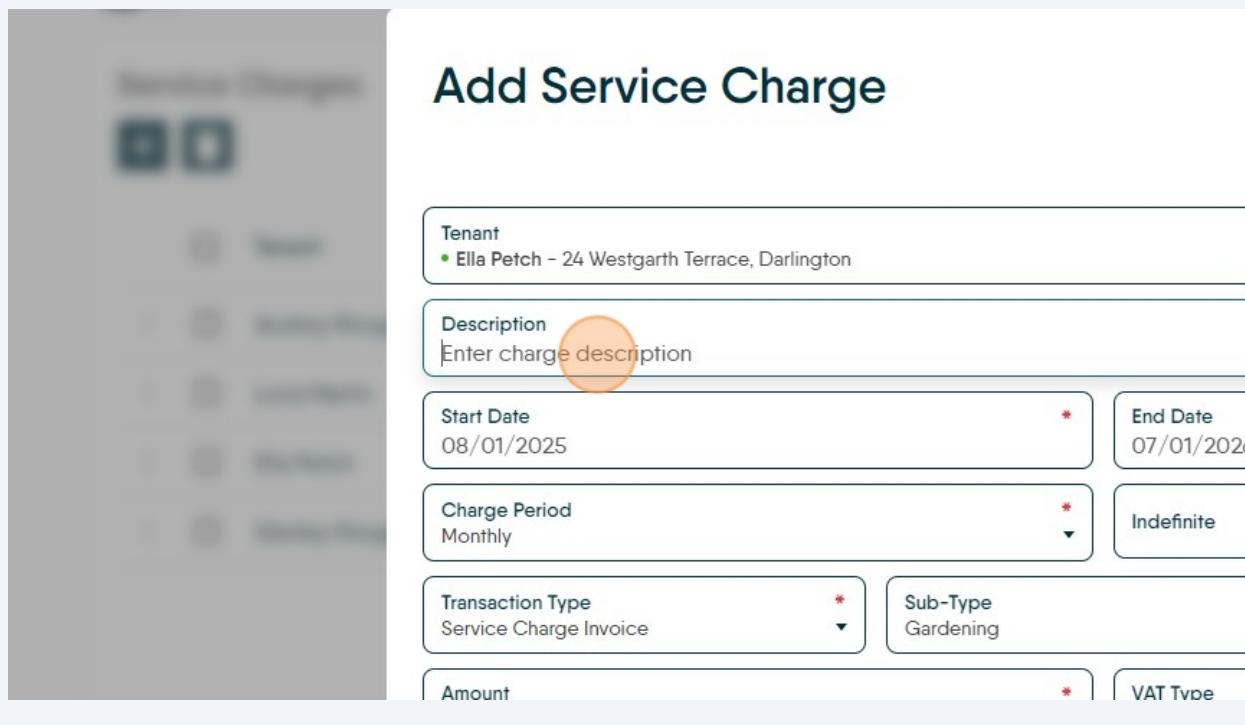
Charge Period * Monthly

Indefinite

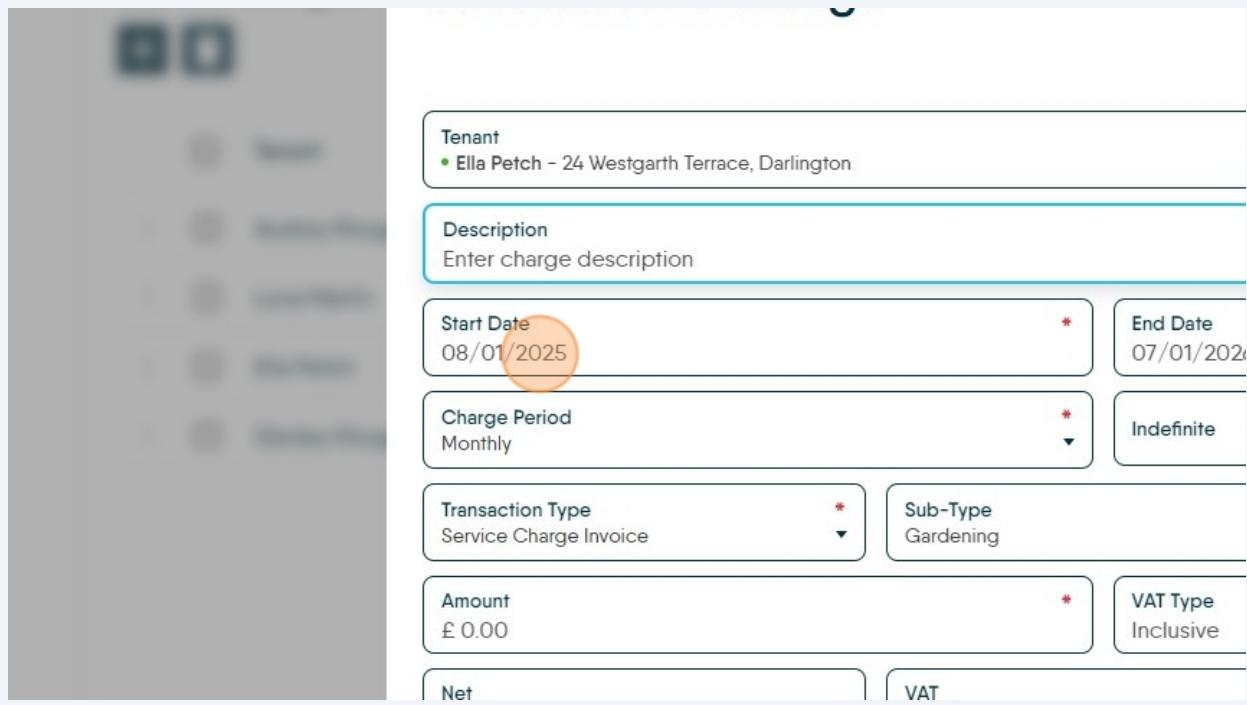
7 Click here to make the charge across all tenants rather than just one specific tenant.



8 Click the "Description" field and add a clear description of the charge.



9 Click the "Start Date" field and set the start date for the charge.



Tenant
• Ella Patch - 24 Westgarth Terrace, Darlington

Description
Enter charge description

Start Date *
08/01/2025

End Date
07/01/2026

Charge Period *
Monthly

Indefinite

Transaction Type *
Service Charge Invoice

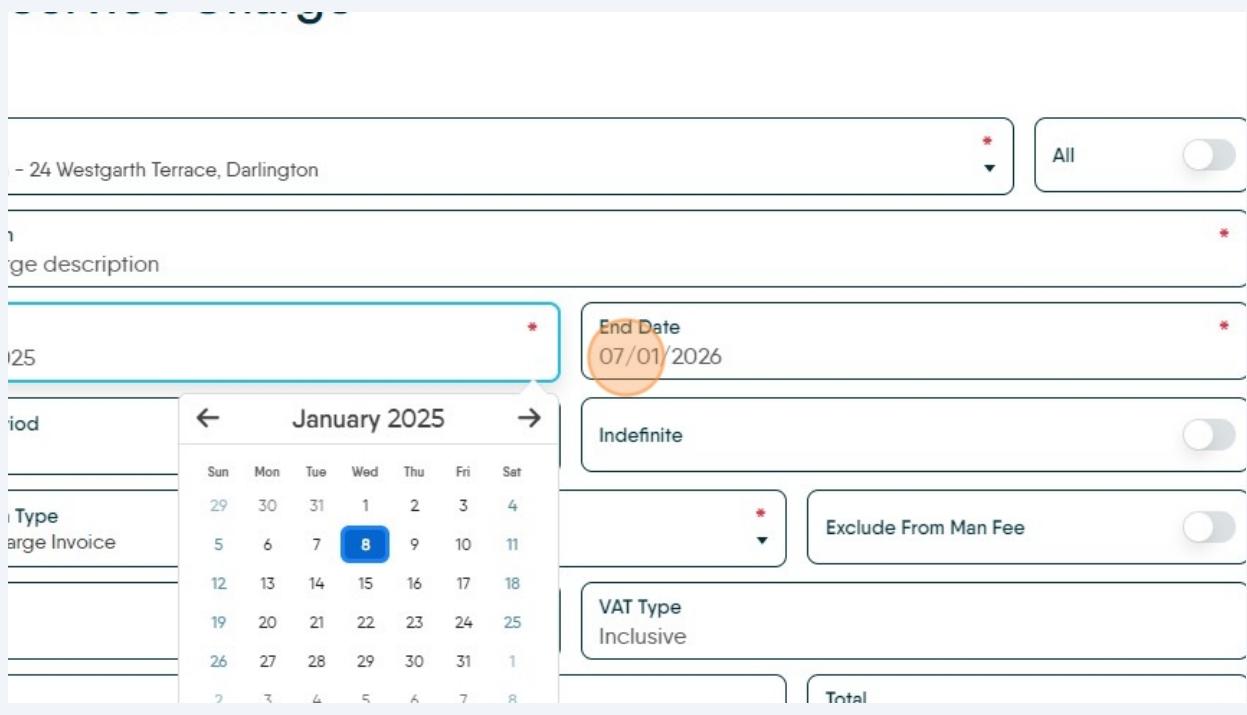
Sub-Type
Gardening

Amount *
£ 0.00

VAT Type
Inclusive

Net VAT

10 Click the "End Date" field. If you are creating an 'indefinite' length charge then you don't need to set this date.



- 24 Westgarth Terrace, Darlington

All

Charge description

Start Date *
08/01/2025

End Date *
07/01/2026

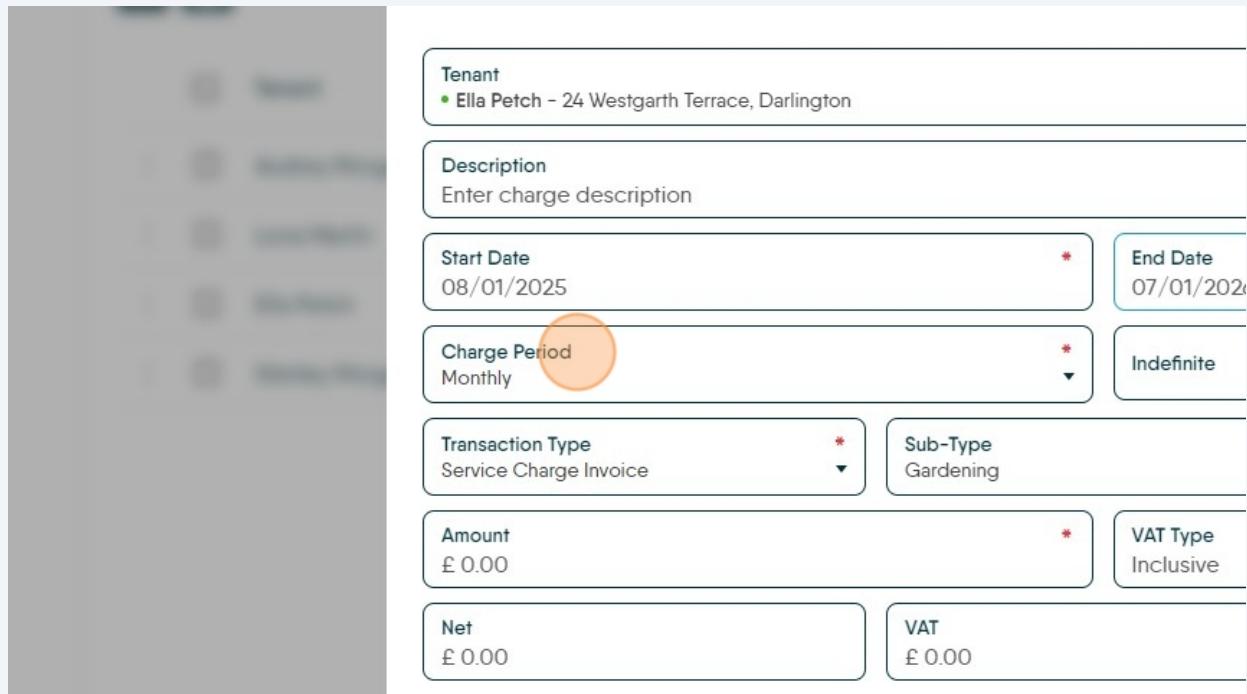
Indefinite

Exclude From Man Fee

VAT Type
Inclusive

Total

11 Click "Charge Period"



The screenshot shows a software interface for managing service charges. On the left, there is a blurred list of items. On the right, there are several input fields:

- Tenant:** Ella Patch - 24 Westgarth Terrace, Darlington
- Description:** Enter charge description
- Start Date:** 08/01/2025
- End Date:** 07/01/2026
- Charge Period:** Monthly (This field is highlighted with an orange circle.)
- Transaction Type:** Service Charge Invoice
- Sub-Type:** Gardening
- Amount:** £ 0.00
- VAT Type:** Inclusive
- Net:** £ 0.00
- VAT:** £ 0.00



Alert! If you set the Transaction type to 'Landlord Service Charge' you can use this process to charge non rent payments to the Tenant and pay the landlord. This process creates a debit to the Tenant ledger and a credit to the property ledger, which is payable to the Landlord.

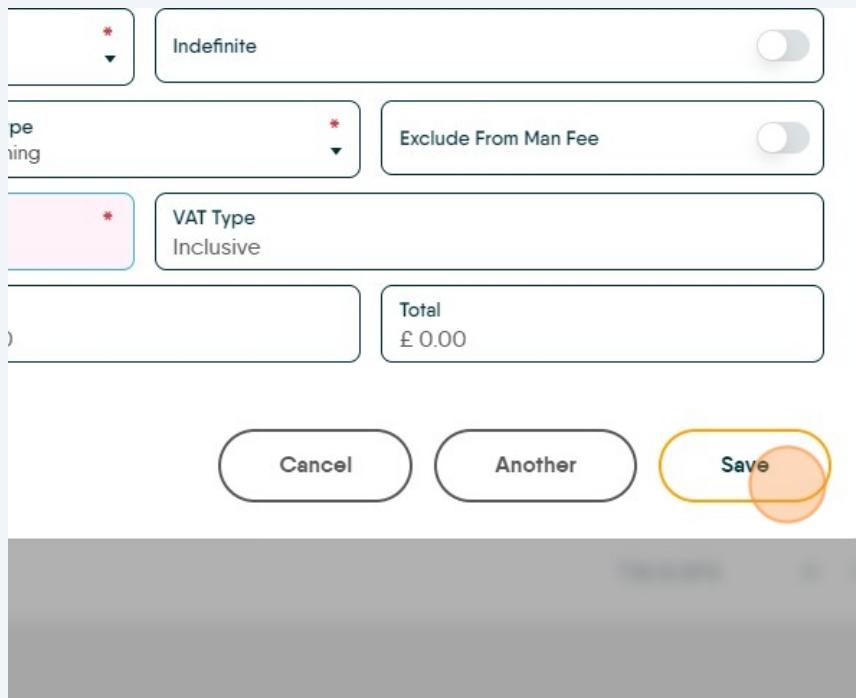
12 Click here to make the charge run for an indefinite period.

The screenshot shows a list of charges. The first charge's 'Indefinite' toggle switch is highlighted with an orange circle, indicating it is selected. Other fields visible include 'Start Date' (07/01/2026), 'End Date' (07/01/2026), 'Charge Period' (Indefinite), 'Transaction Type' (Service Charge Invoice), 'Sub-Type' (Gardening), 'VAT Type' (Inclusive), and 'Total' (£ 0.00).

13 Click the "Amount" field. Add the amount for the charge

The screenshot shows a charge creation form. The 'Amount' field is highlighted with an orange circle, indicating it is selected for input. Other fields visible include 'Start Date' (08/01/2025), 'End Date' (07/01/2026), 'Charge Period' (Monthly), 'Transaction Type' (Service Charge Invoice), 'Sub-Type' (Gardening), 'VAT Type' (Inclusive), 'Net' (£ 0.00), and 'VAT' (£ 0.00). A 'Cancel' button is visible in the bottom right corner.

14 Click "Save"



This charge will be charged to selected/all Tenants automatically based on the period that you set.