


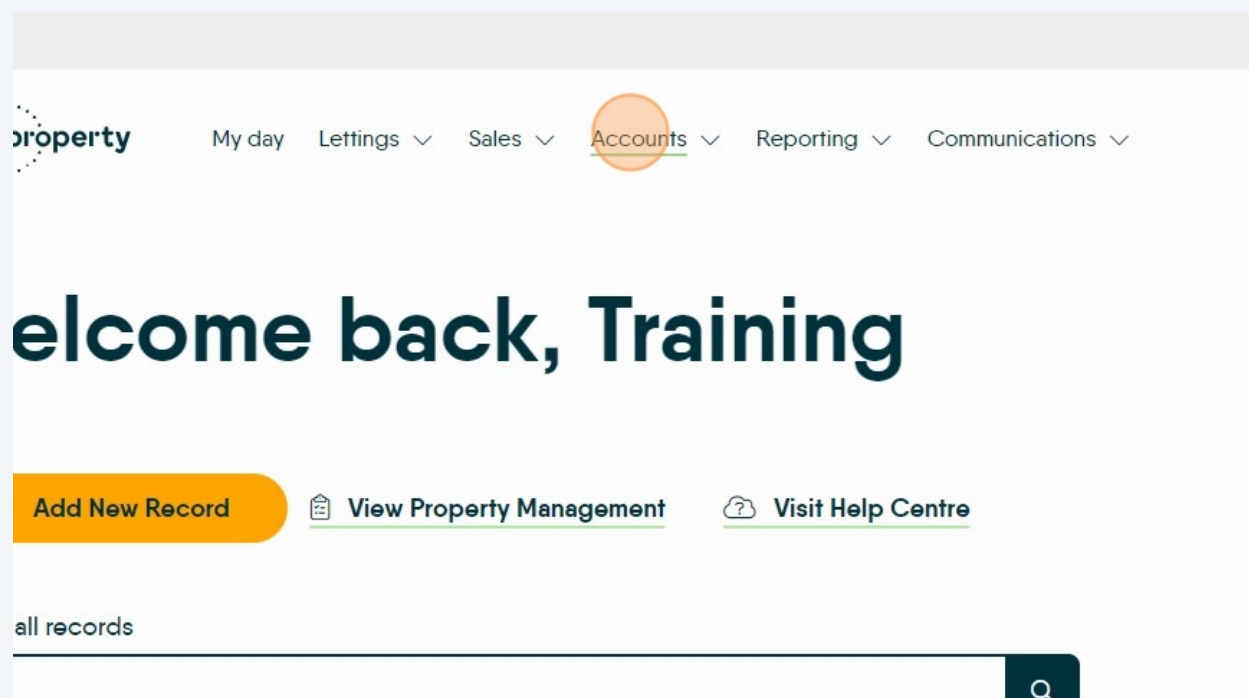
# Adding Service Charges for Tenants



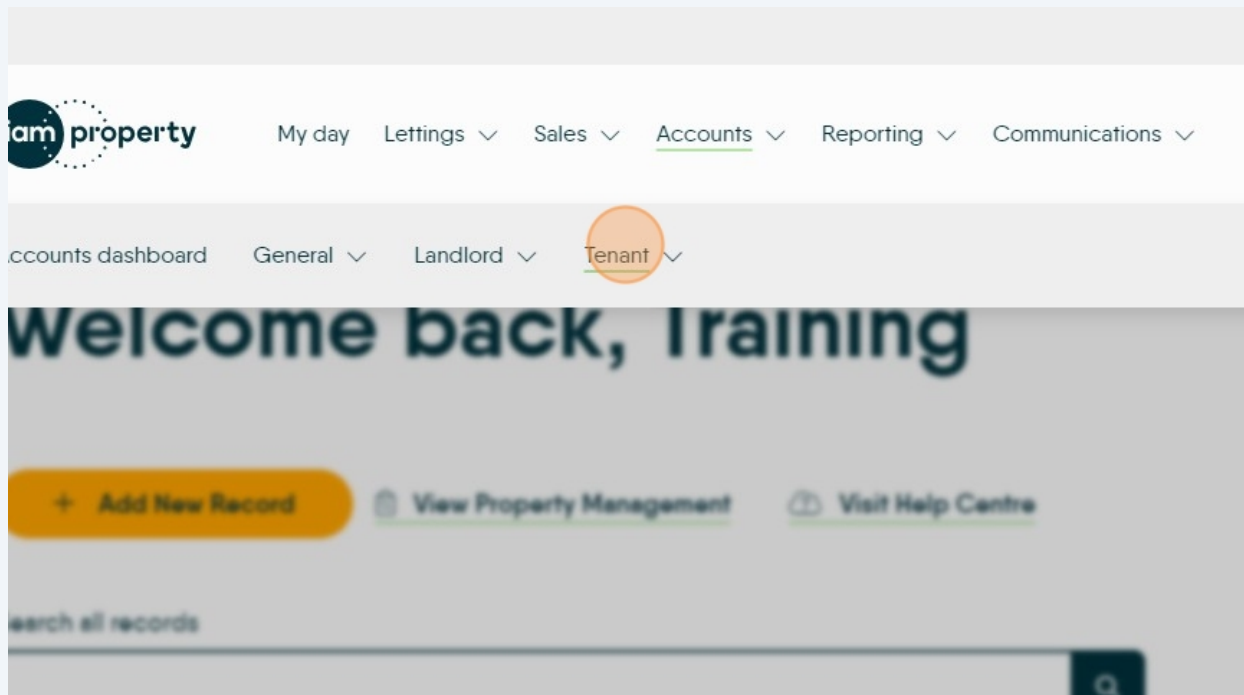
1 Navigate to <https://crm.iamproperty.com/MyDay>

 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.

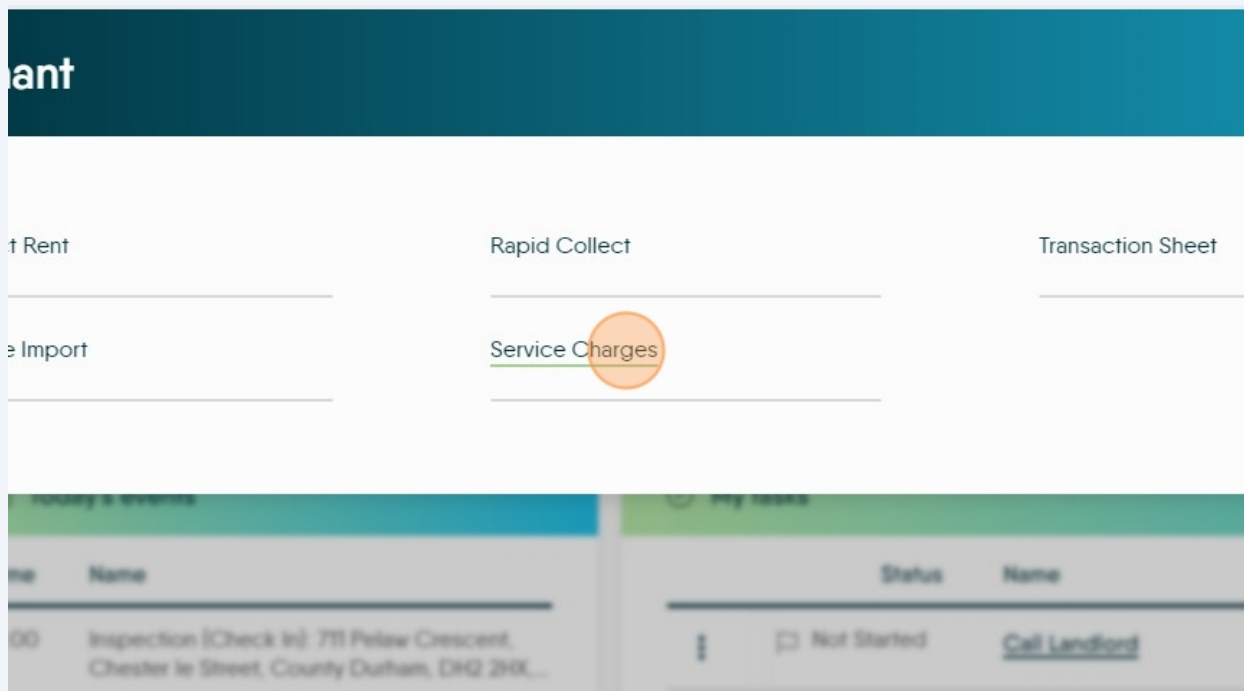
2 Click "Accounts"



### 3 Click "Tenant"



### 4 Click "Service Charges"



- 5 Click here to create the Service Charge.

The screenshot shows the 'iam property' dashboard. The top navigation bar includes 'My day', 'Lettings', 'Sales', 'Accounts', 'Reporting', and 'Communication'. The 'Accounts' menu is expanded, showing 'Add Service Charges' with a plus icon. Below this is a table of existing 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,

The screenshot shows the 'Add Service Charge' form. The 'Tenant' field is highlighted with an orange circle and contains the text 'Select tenant'. Other fields include 'Description' (Enter charge description), 'Start Date' (08/01/2025), 'End Date' (07/01/2025), 'Charge Period' (Monthly), and 'Indefinite'.

**Add Service Charge**

**Tenant**  
Select tenant

**Description**  
Enter charge description

**Start Date**  
08/01/2025

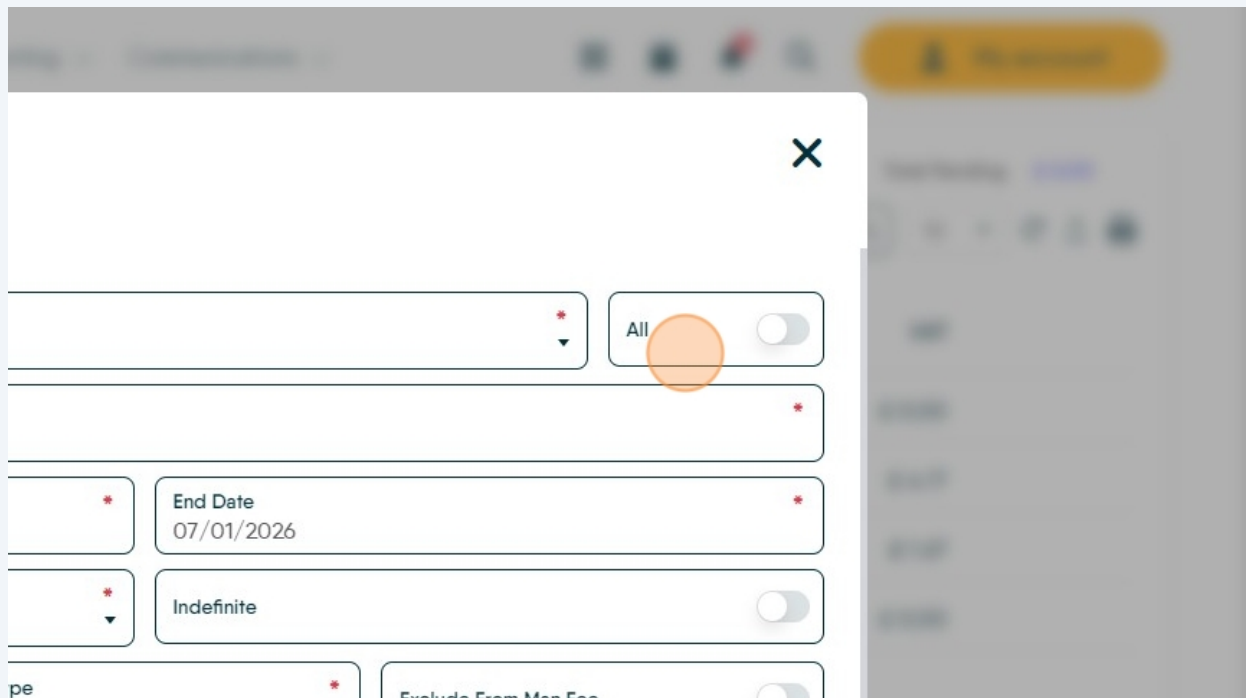
**End Date**  
07/01/2025

**Charge Period**  
Monthly

**Indefinite**

7

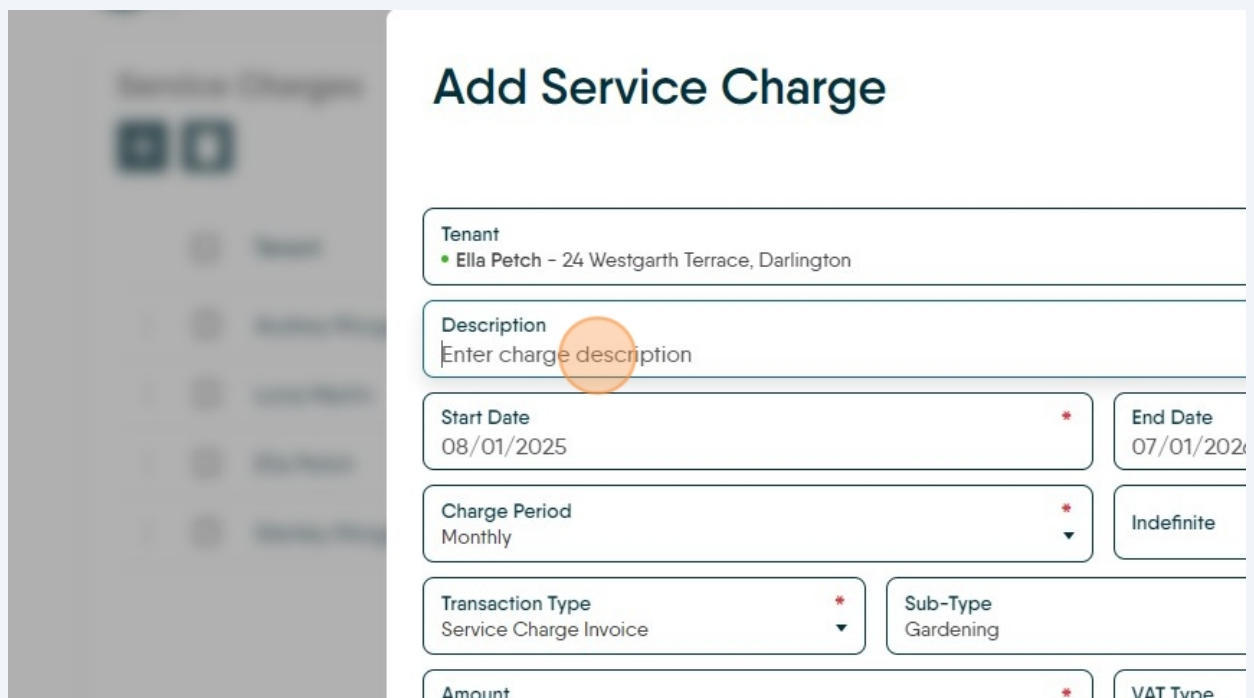
Click here to make the charge across all tenants rather than just one specific tenant.



A screenshot of a web application showing a modal dialog box. The modal has a close button (X) in the top right corner. It contains several input fields and a toggle switch. An orange circle highlights the 'All' toggle switch, which is currently turned off. The toggle switch is labeled 'All' and has a small circle next to it. Below the toggle switch, there are several input fields, including one labeled 'End Date' with the value '07/01/2026'. There is also a field labeled 'Indefinite' with a toggle switch next to it. The background shows a blurred view of the main application interface.

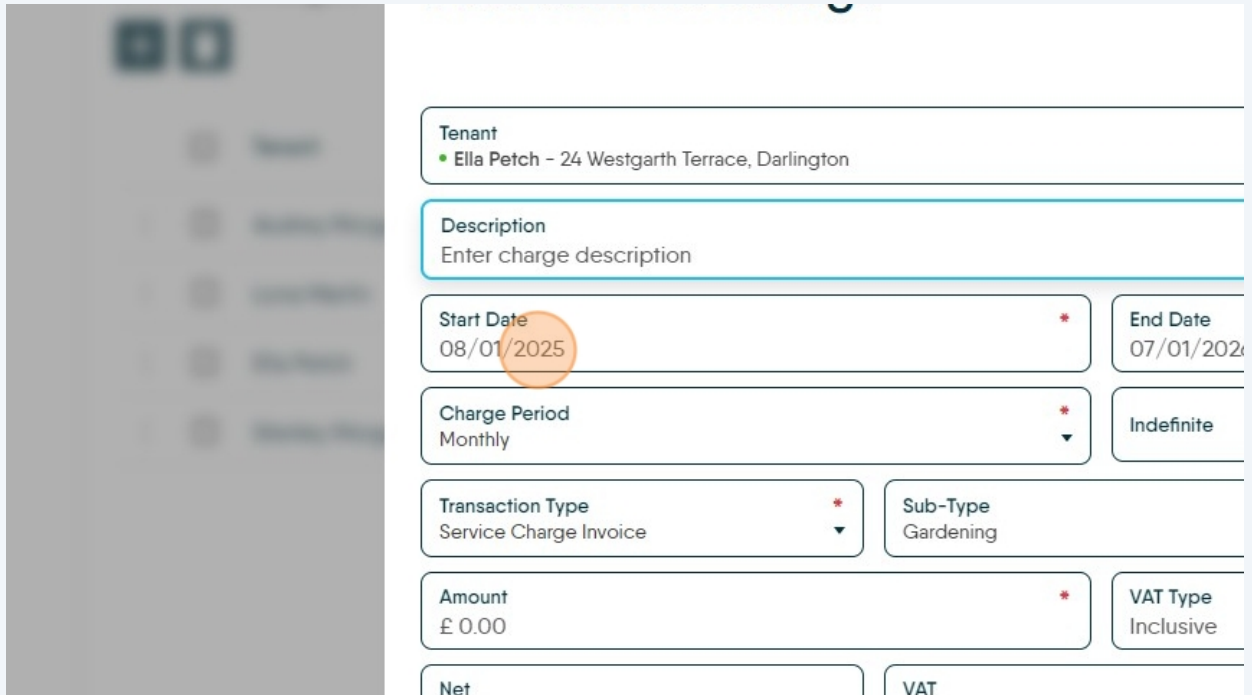
8

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



A screenshot of the 'Add Service Charge' form. The form has a title 'Add Service Charge' at the top. Below the title, there are several input fields. The 'Description' field is highlighted with an orange circle. The 'Description' field contains the text 'Enter charge description'. Other fields include 'Tenant' (Ella Petch - 24 Westgarth Terrace, Darlington), 'Start Date' (08/01/2025), 'End Date' (07/01/2026), 'Charge Period' (Monthly), 'Transaction Type' (Service Charge Invoice), 'Sub-Type' (Gardening), 'Amount', and 'VAT Type'. The form is designed with a clean, modern look and includes validation markers (red asterisks) for required fields.

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



Tenant  
• Ella Petch - 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 \*

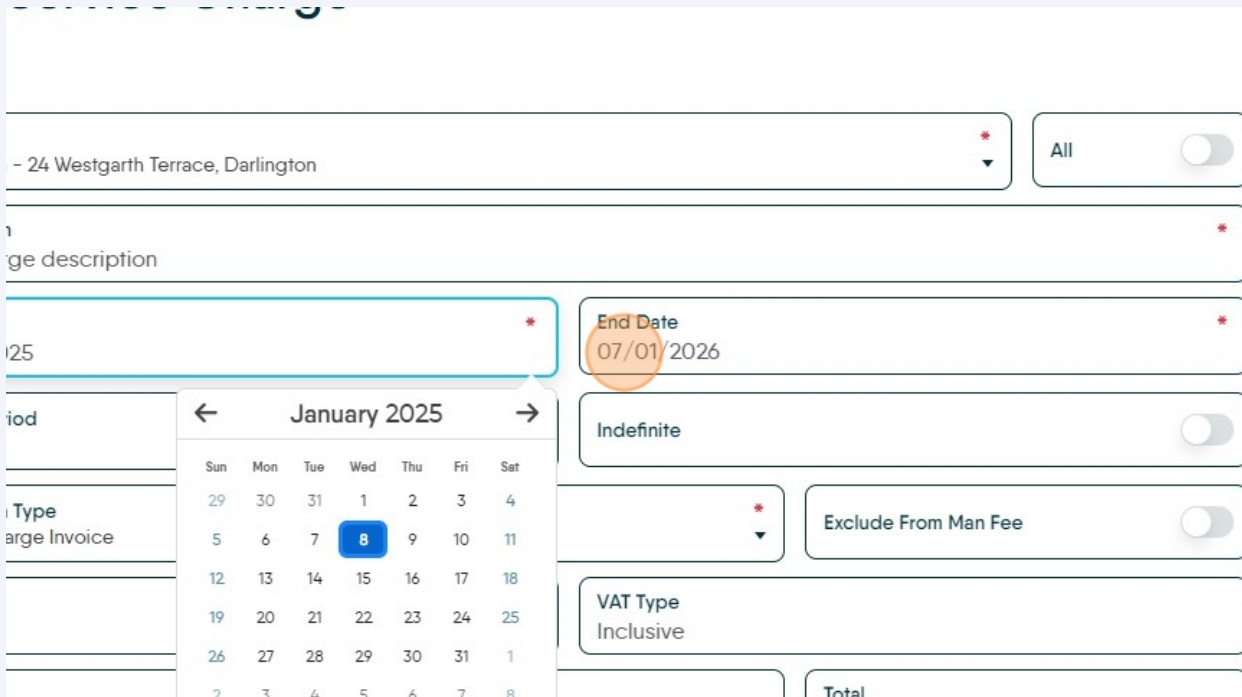
Sub-Type Gardening

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 ☐

ge description \*

25 \*

End Date 07/01/2026 \*

Indefinite ☐

Exclude From Man Fee ☐

VAT Type Inclusive

Total

January 2025

Sun	Mon	Tue	Wed	Thu	Fri	Sat
29	30	31	1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	31	1
2	3	4	5	6	7	8

## 11 Click "Charge Period"

Tenant • Ella Petch - 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 £ 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 form with several fields and sections:

- A dropdown menu with a red asterisk and a downward arrow.
- A section labeled "All" with a toggle switch.
- A field for "End Date" with the value "07/01/2026" and a red asterisk.
- A section labeled "Indefinite" with a toggle switch, highlighted by an orange circle.
- A section labeled "Exclude From Man Fee" with a toggle switch.
- A field for "VAT Type" with the value "Inclusive" and a red asterisk.
- A field for "Total" with the value "£ 0.00".

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

The screenshot shows a form with several fields and sections:

- A section labeled "Start Date" with the value "08/01/2025" and a red asterisk.
- A section labeled "End Date" with the value "07/01/2026".
- A section labeled "Charge Period" with the value "Monthly" and a red asterisk.
- A section labeled "Indefinite" with a toggle switch.
- A section labeled "Transaction Type" with the value "Service Charge Invoice" and a red asterisk.
- A section labeled "Sub-Type" with the value "Gardening".
- A section labeled "Amount" with the value "£ 0.00" and a red asterisk, highlighted by an orange circle.
- A section labeled "VAT Type" with the value "Inclusive".
- A section labeled "Net" with the value "£ 0.00".
- A section labeled "VAT" with the value "£ 0.00".
- A button labeled "Can" in the bottom right corner.

**14** Click "Save"

The screenshot shows a software interface with a form. At the top, there is a dropdown menu with a red asterisk and a toggle switch labeled 'Indefinite'. Below this, there is another dropdown menu with a red asterisk and a toggle switch labeled 'Exclude From Man Fee'. Further down, there is a field labeled 'VAT Type' with the value 'Inclusive' and a red asterisk. At the bottom of the form, there is a 'Total' field showing '£ 0.00'. Below the form, there are three buttons: 'Cancel', 'Another', and 'Save'. The 'Save' button is highlighted with an orange circle.

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