

Updating Next Rent Due Date in iamproperty CRM



This guide shows how to update the Next Rent Due Date in a Tenant record.

If a Rent Due date is edited, be cautious that there may need to be a new/additional rent invoice created to cover the difference in days. E.G. if rent is due on the 25th and this is moved to the 1st then there are up to 7 days of rent to be charged for to catch up from the 25th to the 31st.

1

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

The screenshot shows the 'My Day' dashboard in the iamproperty CRM. The top navigation bar includes links for 'My day', 'Lettings', 'Sales', 'Accounts', 'Reporting', and 'Communications'. Below the navigation bar, there is a large 'Welcome back, Training' message. Underneath, there are three buttons: '+ Add New Record', 'View Property Management', and 'Visit Help Centre'. A search bar labeled 'Search all records' is also present. The dashboard is divided into two main sections: 'Today's events' and 'My tasks'.

Today's events

Time	Name
12:00	Test test

My tasks

Status	Name	Priority	Start date	Due date
Not Started	Call Landlord	High	15/Nov/2024	15/Nov/2024
Not Started	test	High	27/Nov/2024	27/Nov/2024
Not Started	Call Landlord	Medium	12/Dec/2024	12/Dec/2024
Not Started	Call back	High	03/Jan/2025	03/Jan/2025

2

Click "Search" and search for the Tenancy you want to manage the next rent due date on.

The screenshot shows the iamproperty CRM dashboard. At the top, there's a navigation bar with links for iamproperty, CRM, movebutler, and iamsold. Below this is a main navigation menu with options like My day, Lettings, Sales, Accounts, Reporting, and Communications. A search icon is highlighted with a red circle. Below the navigation bar, there's a large heading "I come back, Training". Underneath, there are three buttons: "New Record", "View Property Management", and "Visit Help Centre". A search bar is present with the text "Records" and a search icon. Below the search bar, there are two sections: "My events" and "My tasks". The "My tasks" section contains a table with columns: Status, Name, Priority, Start date, and Due date.

Status	Name	Priority	Start date	Due date
Not Started	Call Landlord	High	15/Nov/2024	15/Nov/2024
Not Started	test	High	27/Nov/2024	27/Nov/2024
Not Started	Call Landlord	Medium	12/Dec/2024	12/Dec/2024

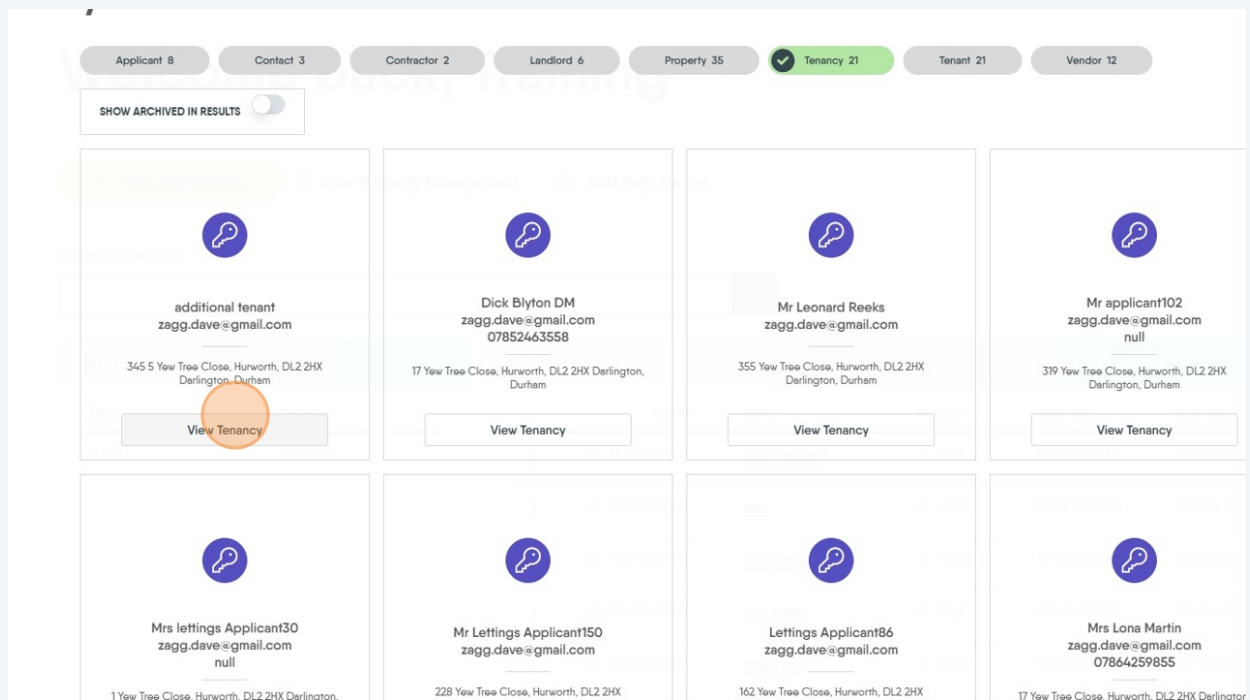
3

For ease, once you have searched for the record click on the "Tenancy" button this will just show the tenancies.

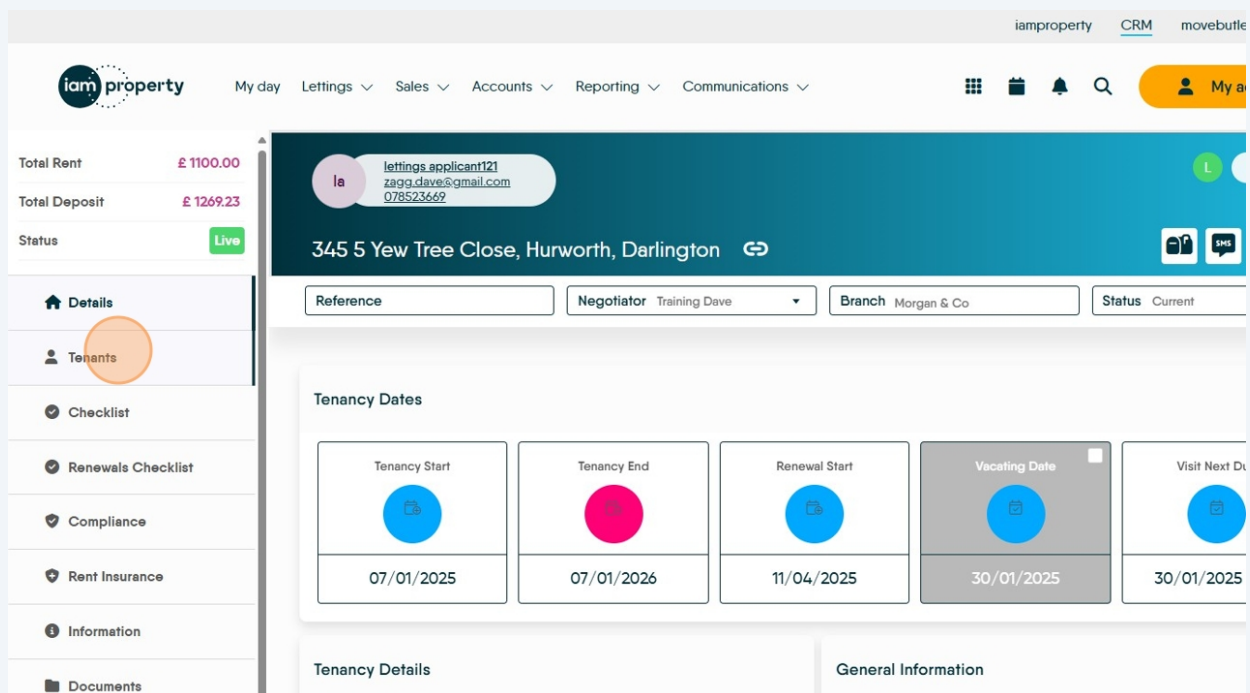
The screenshot shows the iamproperty CRM dashboard with search results for tenancies. At the top, there's a navigation bar with links for iamproperty, CRM, movebutler, and iamsold. Below this is a main navigation menu with options like My day, Lettings, Sales, Accounts, Reporting, and Communications. A search icon is highlighted with a red circle. Below the navigation bar, there's a large heading "I come back, Training". Underneath, there are three buttons: "New Record", "View Property Management", and "Visit Help Centre". A search bar is present with the text "Records" and a search icon. Below the search bar, there are two sections: "My events" and "My tasks". The "My tasks" section contains a table with columns: Status, Name, Priority, Start date, and Due date.

Status	Name	Priority	Start date	Due date
Not Started	Call Landlord	High	15/Nov/2024	15/Nov/2024
Not Started	test	High	27/Nov/2024	27/Nov/2024
Not Started	Call Landlord	Medium	12/Dec/2024	12/Dec/2024

4 Find the Tenancy you want to use and click "View Tenancy"



5 Click "Tenants"



6 Click "View Tenant" on the tenant whose rent due date you are changing.

The screenshot shows a software interface for managing tenants. On the left is a sidebar with various menu items. The main header area displays the address '345 5 Yew Tree Close, Hurworth, Darlington' and a 'Warning' icon. Below the header are filters for Reference, Negotiator (Training Dave), Branch (Morgan & Co), and Status (Current). The main content area shows a list of three tenants. The first tenant, 'Lettings applicant121', has their 'View Tenant' button highlighted with an orange circle. The other two tenants are 'Lettings Applicant109' and 'Additional tenant'.

7 Click this date field and update the date to the date the rent will now be due.

The screenshot shows the 'Tenant Rent Details' section of the software. It contains five cards: 'Rent' (£1100.00), 'Deposit' (£1269.23), 'Holding Deposit' (£0.00), 'Collection Day' (Same Day), and 'Next Rent Due' (07/05/2025). The 'Next Rent Due' date field is highlighted with an orange circle. Below these cards is a 'Rent Period' section set to 'Monthly'. The top header area shows the tenant's name 'Mr lettings applicant121' and various status icons like 'Warning', 'Set GDPR', and 'Periodic Tenancy'.

8 Click here to Save.

The screenshot displays a software interface for managing tenant information. On the left, a sidebar lists financial data: £1100.00, Monthly, 7 May 2025, £4,100.00, 01/01/2025, and 103. The main header area includes a user profile for 'Mr Lettings applicant121' (zagg.clave@gmail.com, 078523669), a red 'TE' status indicator, a 'Warning' icon, a 'Set GDPR' button, and a 'Periodic Tenancy' link. The address '345 5 Yew Tree Close, Hurworth, Darlington' is shown, along with a 'Primary Tenant' tag and communication icons. Below the header, a form contains fields for 'Reference:', 'Negotiator: Training Dave', 'Branch: Morgan & Co', and 'Status: Prebooked'. The 'Tenant Rent Details' section features five cards: 'Rent' (£1100.00), 'Deposit' (1269.23), 'Holding Deposit' (0.00), 'Collection Day' (Same Day), and 'Next Rent Due' (06/05/2025). Each card has an icon and a small up/down arrow. Below these is a 'Rent Period' section set to 'Monthly'. A 'Save Changes' button with a lock icon is in the bottom right corner.

Rent	Deposit	Holding Deposit	Collection Day	Next Rent Due
£1100.00	1269.23	0.00	Same Day	06/05/2025

Rent Period: Monthly

Save Changes

9 The next new rent invoice will be generated on the date you have set. If you have moved the date (e.g. from the 27th of a month to the 1st) then remember the tenant may owe you a few days rent, or you may owe them.