

# Creating a Deposit Invoice for Tenants



This guide offers a straightforward approach to creating a deposit invoice for tenants, ensuring accuracy and efficiency. By following the outlined steps, users can easily navigate the system, customise transaction descriptions, opt to create a physical deposit invoice.

A deposit invoice can be created at anytime before the payment is receipted into CRM.

Utilising this guide will help streamline financial processes.

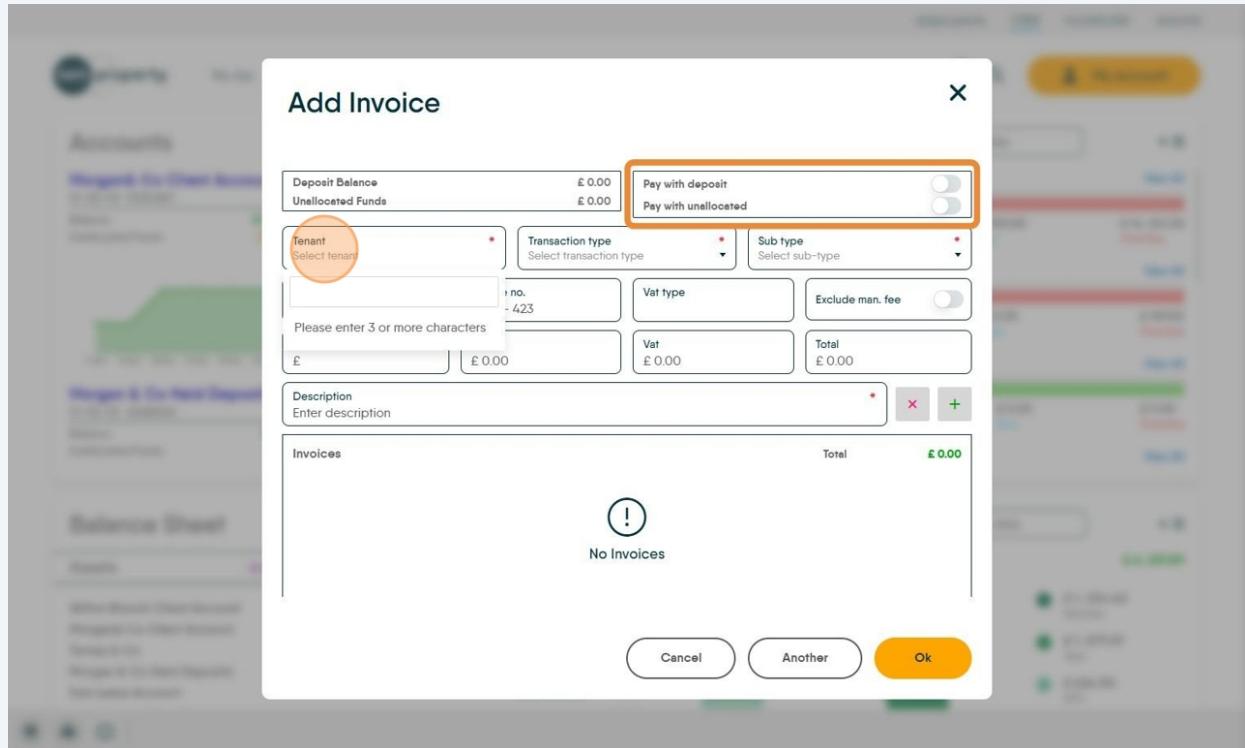
- 1 Navigate to <https://crm.iamproperty.com/Dashboards/Accounts>

- 2 Click here.

Invoice Type	Total Due	Paid	Due	Overdue		
Rent Invoice	£ 698.31	£ 700.00	£ 48,936.36	£ 26,895.00	£ 1,400.00	£ 20,641.36
Tenant Fee Invoice			£ 167.00	£ 0.00	£ 0.00	£ 167.00
Deposit Invoice						

- 3 Click "Select tenant" type the Tenant name and select them from the drop down menu. There is also the option to pay this invoice with UnAllocated funds or Deposit Funds, if there are funds available they will show in the box highlighted on

screen.



## Add Invoice

The screenshot shows the 'Add Invoice' dialog box. The 'Pay with deposit' and 'Pay with unallocated' buttons are visible. The 'Tenant' field is highlighted with an orange circle. The 'Invoices' section shows 'No Invoices' with a warning icon. At the bottom, there are three buttons: 'Cancel', 'Another', and 'Ok'.

- 4 Click "Select transaction type" then click "Deposit Invoice"

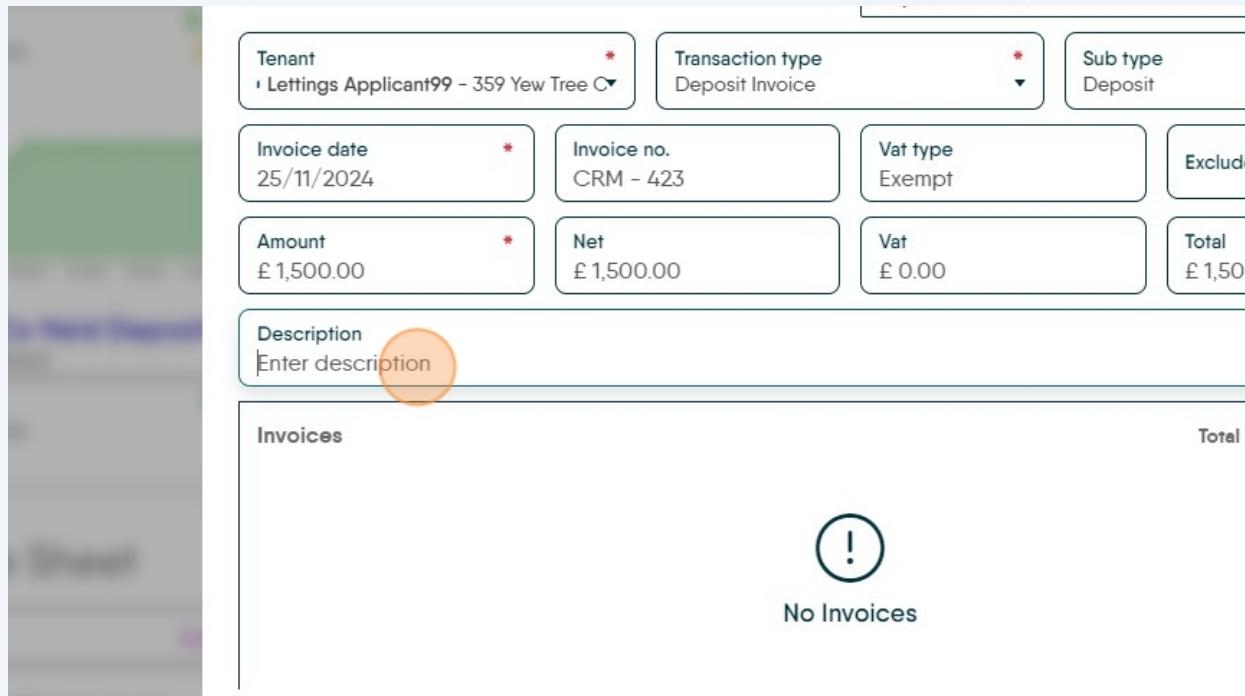
This will bring over all of the data relating to the Deposit payment as set up in the Tenancy document.

# Add Invoice

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

Unallocated Funds	£ 0.00	Pay with unallocated
Tenant Lettings Applicant99 - 359 Yew Tree C*	Transaction type Select transaction type	Sub type Select sub-type
Invoice date 25/11/2024	Invoice no CRM - 4	Exclude man. fee
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	
	 <b>No Invoices</b>	

5 Click the "Description" field and add a description for the transaction. Make this as clear as possible so it is easy to find.



Tenant \*  
Lettings Applicant99 - 359 Yew Tree CV

Transaction type \*  
Deposit Invoice

Sub type  
Deposit

Invoice date \*  
25/11/2024

Invoice no.  
CRM - 423

Vat type  
Exempt

Amount \*  
£ 1,500.00

Net  
£ 1,500.00

Vat  
£ 0.00

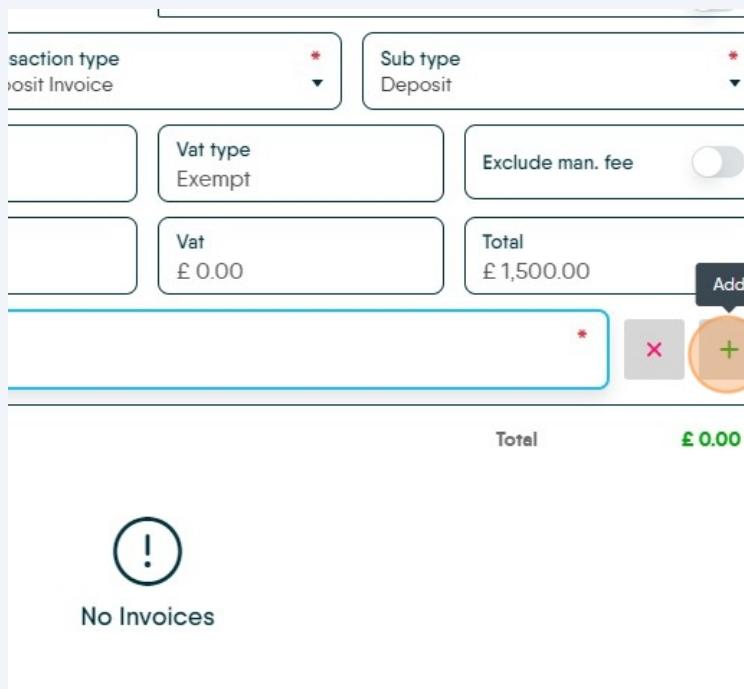
Total  
£ 1,500.00

Description  
Enter description

Invoices Total

No Invoices

6 Click here to create the Deposit Invoice



action type \*  
Deposit Invoice

Sub type \*  
Deposit

Vat type  
Exempt

Exclude man. fee

Vat  
£ 0.00

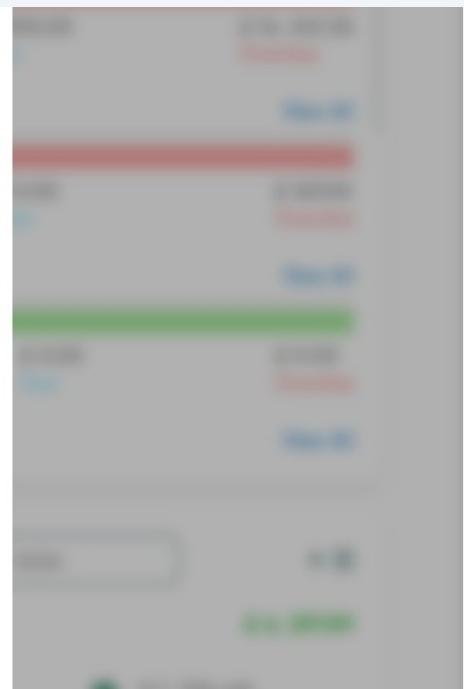
Total  
£ 1,500.00

Add

\*

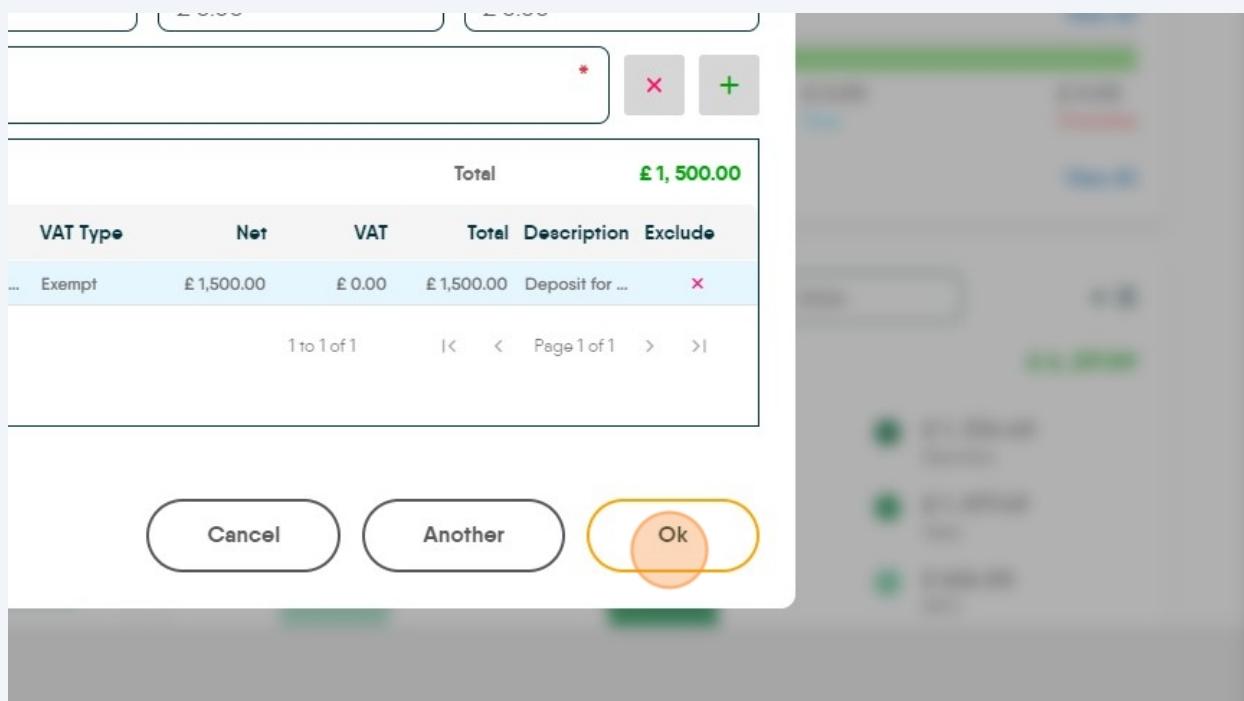
Total £ 0.00

No Invoices



7

Click "OK" to complete creating the invoice. The Invoice is then created and will sit in the Deposit tile till paid.



8

Click either "Yes" or "No" to producing a tenant invoice to be sent to the tenant.

