

Editing the Contractor Commission Rate in Expenses



This guide provides a straightforward process for charging maintenance expenses to a landlord and editing contractor commission rates in your expense management system.

By following these steps, users can efficiently adjust commission rates, which is crucial for maintaining proper budget allocations.

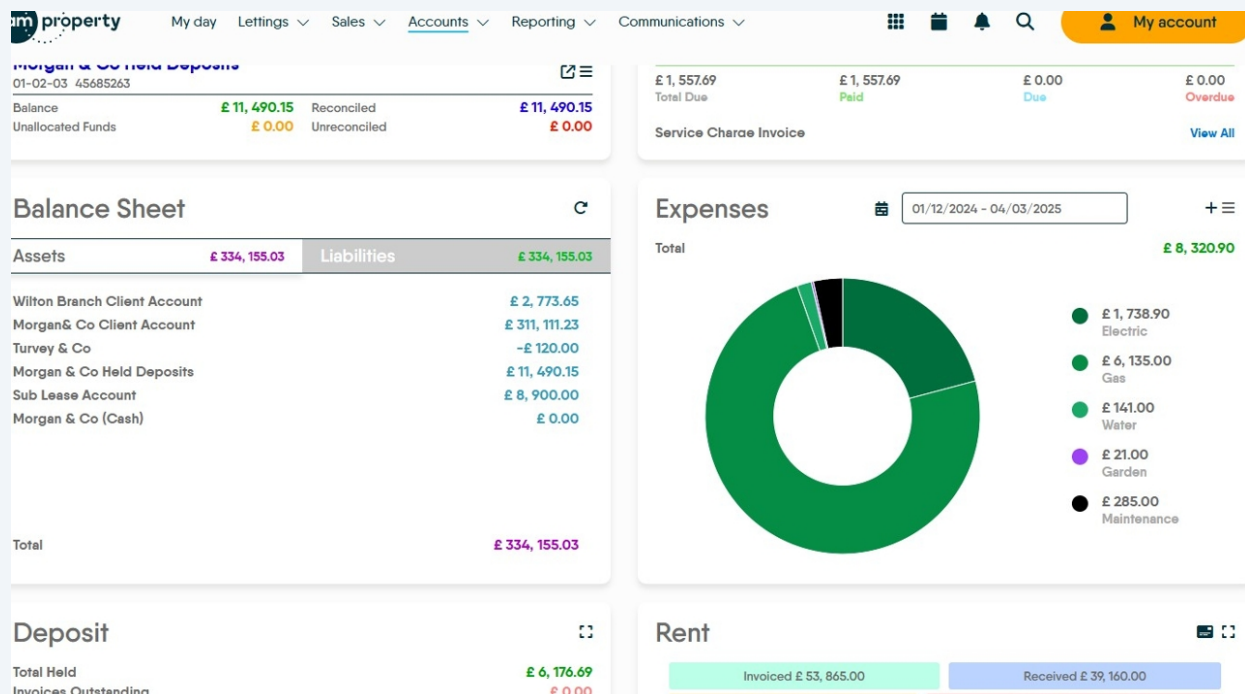


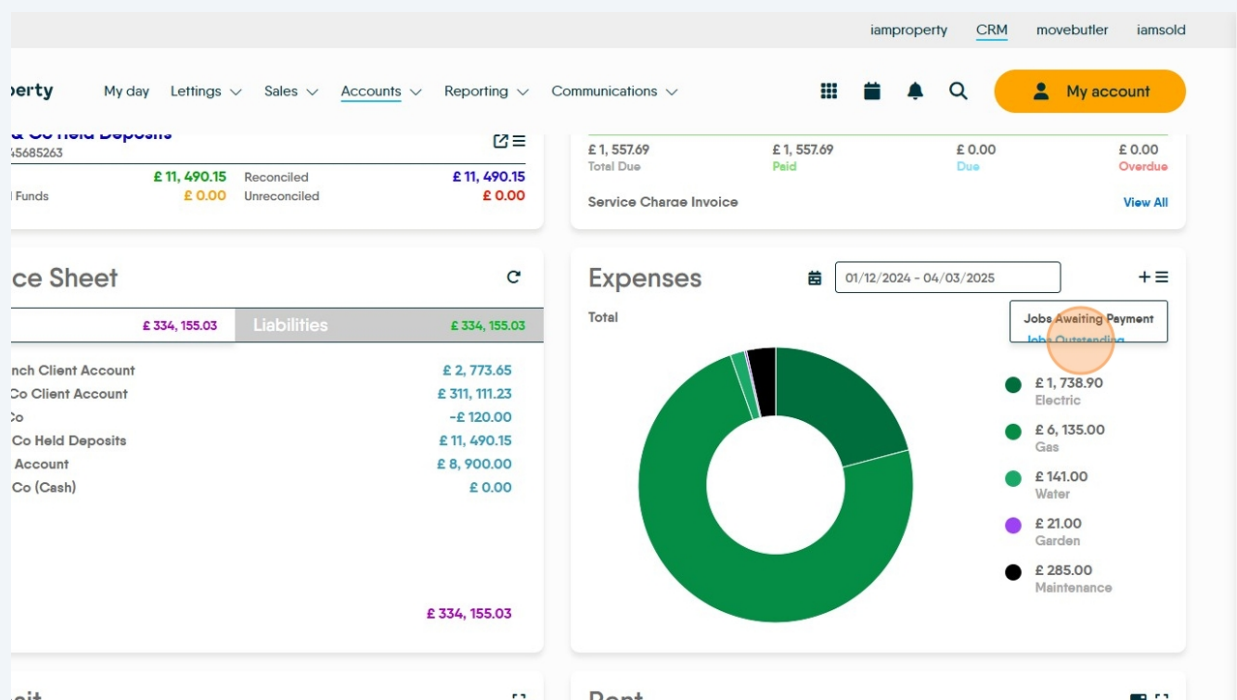
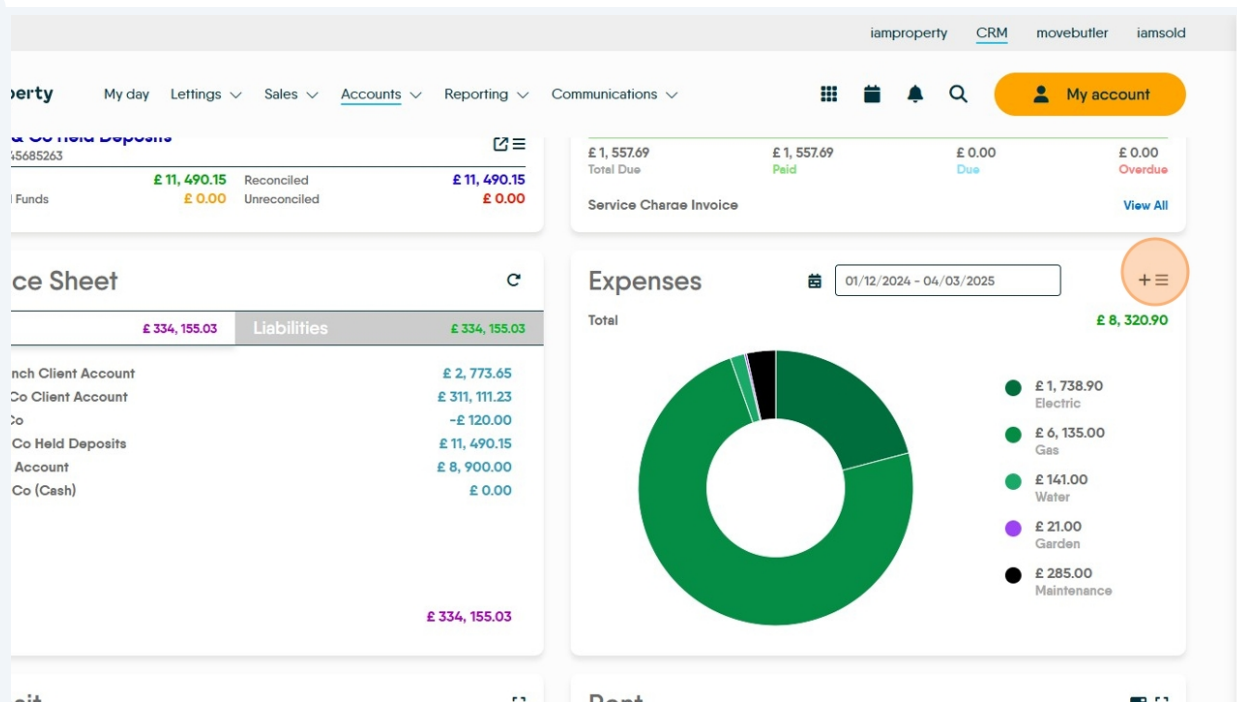
Contractor commissions are charged to the Contractor and paid to the Agent ledger when the contractor is paid. i.e. it reduces the payment to the Contractor.

Uplifts are charged to the Landlord and paid to the Agent ledger when Perform Payments is run.

1

Navigate to <https://crm.iamproperty.com/Dashboards/Accounts>
Click here.
Click "Jobs Outstanding"





The jobs in 'Jobs Outstanding' are first created in Property Management. When the job is marked as completed by the person managing the maintenance tasks, they are added to Jobs Outstanding list. This is the best way to create an expense.

It is possible to create a new Expense by clicking the + in the Expenses tile or in the Jobs Outstanding menu.

For this guide we will use jobs created in Property Management.

2 Using the 3-dot menu. Click "Edit"

The screenshot shows the 'Jobs Outstanding' section of the 'iam property' application. At the top, there's a navigation bar with 'My day', 'Lettings', 'Sales', 'Accounts', 'Reporting', and 'Communications'. Below this, a 'Jobs Outstanding' header is followed by a filter dropdown set to 'Property' and a search bar. A table lists two jobs:

<input type="checkbox"/>	Job No.	Property	Contractor	Description	Contacted Date	Completion Date
<input type="checkbox"/>	392	Flat 14 Westpoint, Northumberla...	Morgan Contracting	NO heating checked pre...	21/02/2025	24/02/2025
<input type="checkbox"/>	393	Natwest 28 Market Place, Barna...	Morgan Contracting	all plumbing needs to be...	06/02/2025	20/02/2025

A 3-dot menu is shown next to Job 392, with 'Edit' and 'Delete' options highlighted.

3 All the key data is in the job record, all that is required is to click "Select expense category" and then select the appropriate option from the list.

The screenshot shows the 'Details' tab of a job record for Job 392. The form contains the following fields:

- Job No.: 392
- Title: TB_GasHeating
- Property: Flat 14 Westpoint, Northumberland Street, Darlington
- Record Type: Landlord
- Expense Category: Select expense category (dropdown menu is open showing options: Electric, Gas, Water, EPC, Windows, Garden)
- PM Job Category: Gas Heating
- Priority Level: Gas

Buttons at the bottom include 'Cancel', 'Another', 'Save', and 'Save & Pay Now'.

Details

Attachments

Info

Payment

Job No.

392

Job

Date Contacted

21/02/2025

Title

TB_GasHeating

Completion Date

24/02/2025

Property

Flat 14 Westpoint, Northumberland Street, Darlington

Contractor

Morgan Contracting

Record Type

Landlord

Record

Oliver Hardy (Primary)

Expense Category

Gas

PM Job Category

Gas Heating

Priority Level

Gas

Description

NO heating checked pressure etc

Notes

Enter notes

Cancel

Another

Save

Save & Pay Now

4 Click "Payment"

Edit Expense

×

Details

Attachments

Info

Payment

Property

£ 781.20

Float

£ 0.00

Deposit

£ 0.00

Invoice

Create Invoice

☐

Invoice Date

21/02/2025

Invoice No.

Enter invoice no.

Contractor Invoice No.

25

Invoice Amount

£ 150.00

Sub-Type

Select transaction sub-type

VAT Type

VAT Type

Net

£ 150.00

VAT

£ 0.00

Total

£ 150.00

Tax Deductible

☐

Split Expense

☐

Tenant

Audrey Morgan (Primary)

Commission

Exclude Commission

☐

Commission

£ 15.00

%

£

Amount

£ 15.00

5

This screen is where the Landlord Invoice for the work is created. Click "Create Invoice".

If the job has been completed in Property Management correctly then all the costings etc will be in this screen. If not then complete all the mandatory fields, i.e. those with a red star.

Edit Expense

Details Attachments Info Payment

Property £ 781.20 Float £ 0.00 Deposit £ 0.00

Invoice

Create Invoice ☒ Invoice Date 21/02/2025 Invoice No. CRM - 525 Contractor Invoice No. 25

Invoice Amount £ 150.00 Sub-Type Select transaction sub-type VAT Type VAT Type

Net £ 150.00 VAT £ 0.00 Total £ 150.00 Tax Deductible ☐

Split Expense ☐ Tenant Audrey Morgan (Primary)

Commission

Exclude Commission ☐ Commission £ 15.00 % £ Amount £ 15.00

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Click "Select transaction sub-type"

Edit Expense

Details Attachments Info Payment

Property £ 781.20 Float £ 0.00 Deposit £ 0.00

Invoice

Create Invoice ☒ Invoice Date 21/02/2025 Invoice No. CRM - 525 Contractor Invoice No. 25

Invoice Amount £ 150.00 Sub-Type Select transaction sub-type VAT Type VAT Type

Net £ 150.00 VAT £ 0.00 Total £ 150.00 Tax Deductible ☐

Split Expense ☐ Tenant Audrey Morgan (Primary)

Commission

Exclude Commission ☐ Commission £ 15.00 % £ Amount £ 15.00

Compliance Check
General Maintenance
VAT Inclusive
VAT Exclusive
VAT Exempt

Landlord Expense Invoice -

Cancel Another Save Save & Pay Now

7

If the job cost is to be split between the Landlord and the Tenant click the "Split Expense" toggle and then set the percentage split.

The screenshot shows the 'Details' tab of an invoice form. At the top, there are tabs for 'Details', 'Attachments', 'Info', and 'Payment'. Below these are three summary boxes: 'Property' with a value of £781.20, 'Float' with £0.00, and 'Deposit' with £0.00. The main section is titled 'Invoice' and contains several input fields and toggles. A toggle for 'Create Invoice' is turned on. The 'Invoice Date' is 21/02/2025, 'Invoice No.' is CRM - 525, and 'Contractor Invoice No.' is 25. The 'Invoice Amount' is £150.00, 'Sub-Type' is 'Compliance Check', and 'VAT Type' is 'Exclusive'. Below these are 'Net' (£150.00), 'VAT' (£30.00), 'Total' (£180.00), and a 'Tax Deductible' toggle. The 'Split Expense' toggle is highlighted with an orange circle. The 'Tenant' dropdown is set to 'Audrey Morgan (Primary)'. At the bottom, there is a 'Commission' section with an 'Exclude Commission' toggle, a 'Commission' field (£15.00), a currency selector (set to £), and an 'Amount' field (£15.00). At the very bottom are four buttons: 'Cancel', 'Another', 'Save', and 'Save & Pay Now'.

At this point 'Save' or 'Save and Pay Now' can be selected and the charge made to the Landlord.

Edit Contractor Commission or add Landlord Uplift



Alert! you cannot charge an uplift and a commission, the CRM will not allow this, it is one or the other.

8

If you need to charge or edit a contractor commission or add an uplift to the Landlord, this is done from the 'Commission' section.

Click this text field to change the value of the commission or add a new contractor commission. If already set (in Contractor record) commission can be disabled by clicking the Exclude Commission toggle ON.

Split Expense ☐

Tenant
Audrey Morgan (Primary) ▼

Commission

Exclude Commission ☐

Commission
£ 15.00

% £

Amount
£ 15.00

Uplift ☐

Uplift To
£ 0.00

VAT Type
Inclusive

Net
£ 12.50

VAT
£ 2.50

Total Commission
£ 15.00

Cancel

Another

Save

Save & Pay Now

9

In the example shown above the Contractor will be charged £15 which is deducted from their payment and added to the (your) Agent Ledger.

- 10 To add an 'Uplift' or charge to the Landlord, click here.

Net
£ 150.00

VAT
£ 30.00

Total
£ 180.00

Tax Deductible ☐

Split Expense ☐

Tenant
Audrey Morgan (Primary)

Commission

Exclude Commission ☐

Commission
£ 15.00

% £

Amount
£ 15.00

Uplift ☐

Uplift To
£ 0.00

VAT Type
Inclusive

Net
£ 12.50

VAT
£ 2.50

Total Commission
£ 15.00

Cancel Another Save Save & Pay Now

- 11 Click the "Uplift To" field and add the total amount you are charging the Landlord. N.B. this is the contractor charge plus your uplift. So if the contractor charges £100 and your uplift is £20 type £120 into the 'Uplift To' field.

The uplift is charged to the Landlord and paid into the (your) Agent Ledger.

Details Attachments Info Payment

Invoice Amount
£ 150.00

Sub-Type
Compliance Check

VAT Type
Exclusive

Net
£ 150.00

VAT
£ 30.00

Total
£ 180.00

Tax Deductible ☐

Split Expense ☐

Tenant
Audrey Morgan (Primary)

Commission

Exclude Commission ☐

Commission
£ 15.00

% £

Amount
£ 0.00

Uplift ☐

Uplift To
£ 0.00

VAT Type
Inclusive

Net
£ 0.00

VAT
£ 0.00

Total Commission
£ 0.00

Cancel Another Save Save & Pay Now