

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 screenshot shows the iam property CRM interface with the following sections visible:

- Held Deposits:** Shows a balance of £11,490.15.
- Balance Sheet:** Compares Assets (£334,155.03) and Liabilities (£334,155.03).
- Expenses:** A donut chart showing expenses for various categories: Electric (£1,738.00), Gas (£6,135.00), Water (£141.00), Garden (£21.00), and Maintenance (£285.00). Total expenses are £8,320.90.
- Deposit:** Total Held Deposits are £6,176.69, with £0.00 outstanding.
- Rent:** Invoiced £53,865.00, Received £39,160.00.

Property My day Lettings ▾ Sales ▾ **Accounts ▾** Reporting ▾ Communications ▾

Co Held Deposits £11,490.15 Reconciled £11,490.15

Funds £ 0.00 Unreconciled £ 0.00

Balance Sheet £ 334,155.03 Liabilities £ 334,155.03

Bank Client Account £ 2,773.65
 Co Client Account £ 311,111.23
 > -£ 120.00
 Co Held Deposits £ 11,490.15
 Account £ 8,900.00
 Co (Cash) £ 0.00

£ 334,155.03

£ 1,557.69 Total Due £ 1,557.69 Paid £ 0.00 Due £ 0.00 Overdue £ 0.00

Service Charge Invoice View All

Expenses 01/12/2024 - 04/03/2025 + ☰

Total £ 8,320.90

Category	Amount
Electric	£ 1,738.90
Gas	£ 6,135.00
Water	£ 141.00
Garden	£ 21.00
Maintenance	£ 285.00

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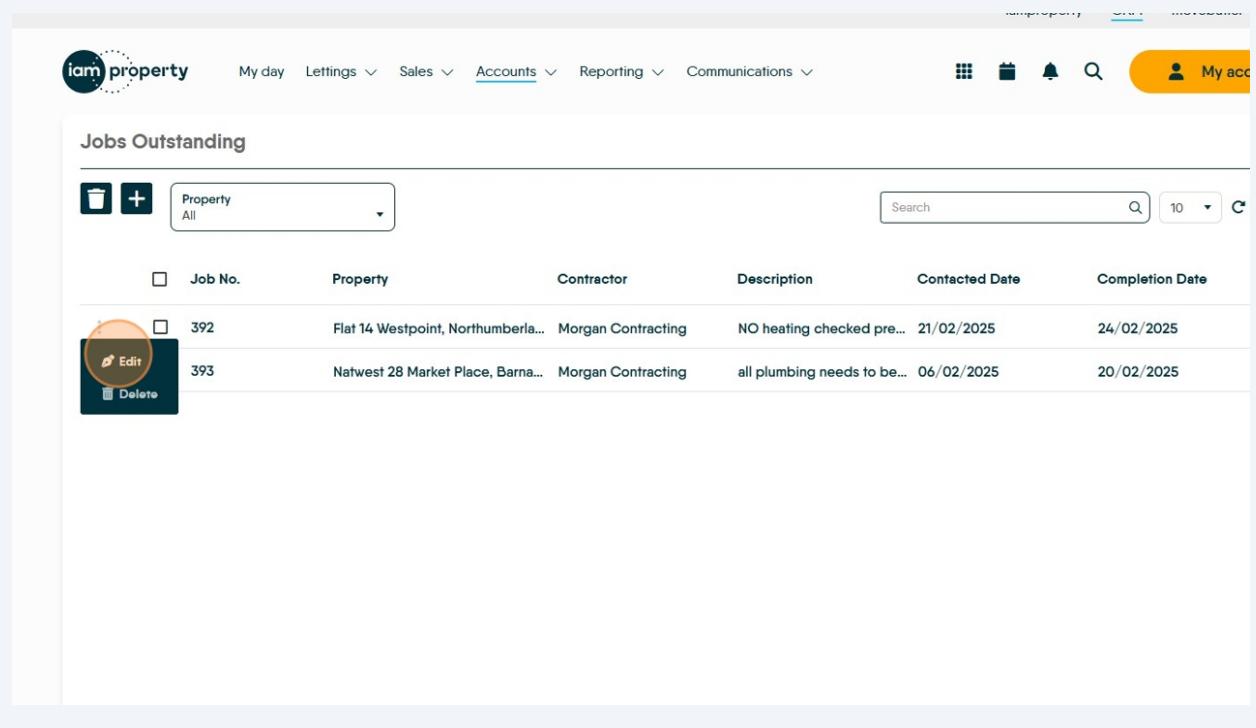


The jobs in 'Jobs Outstanding' are first created in Property Management. When the job is marked as completed by the person managing the maintenance tasks, they are added to Jobs Outstanding list. This is the best way to create an expense.

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

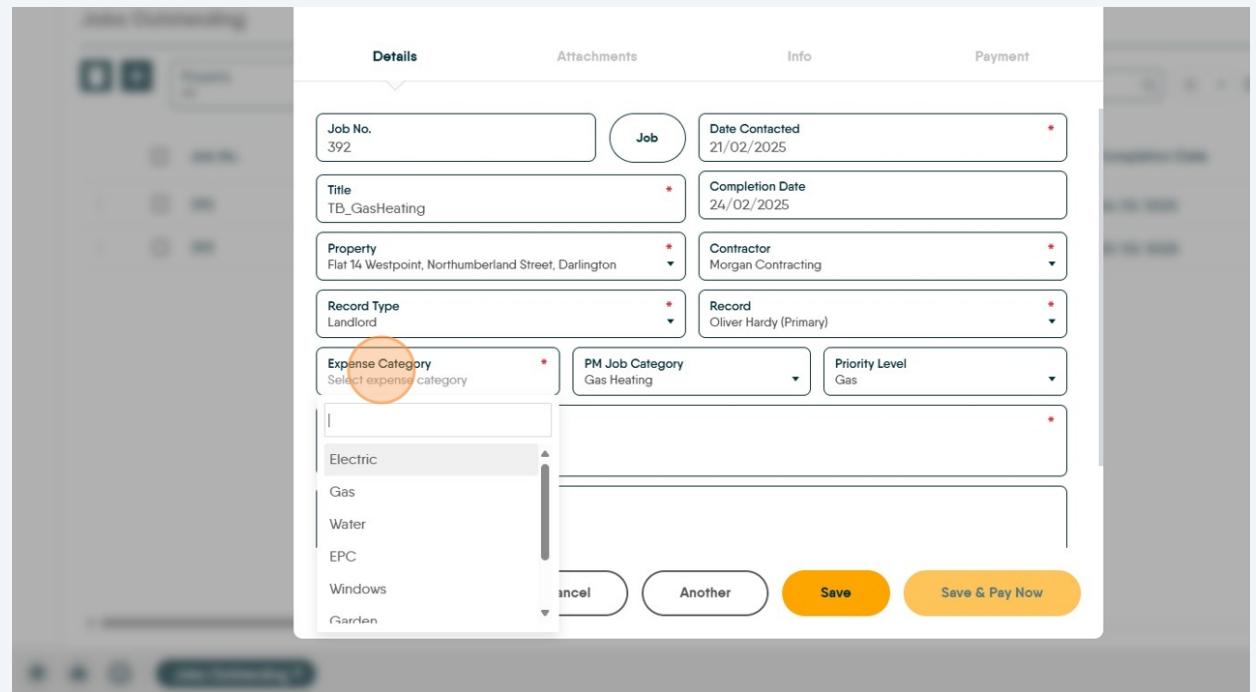
For this guide we will use jobs created in Property Management.

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

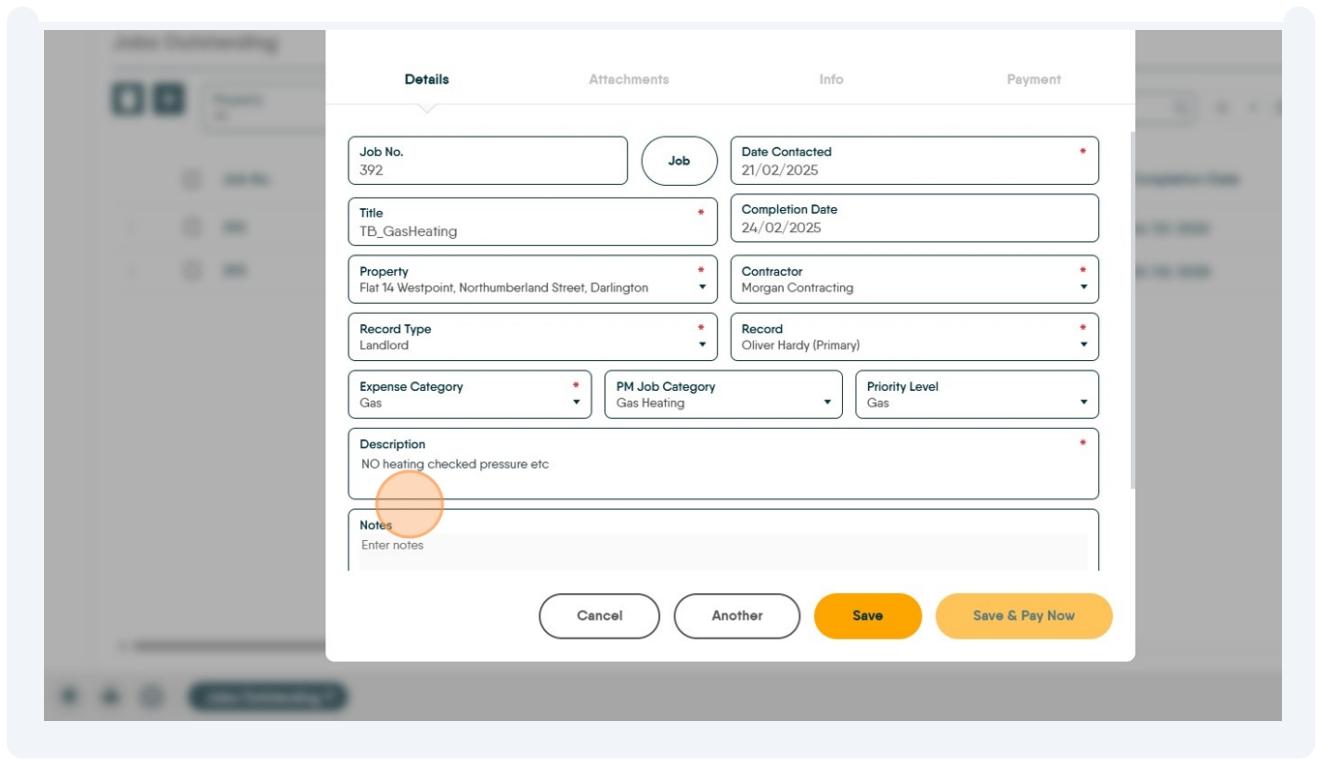


The screenshot shows the 'Jobs Outstanding' list in the iam property software. The top navigation bar includes 'My day', 'Lettings', 'Sales', 'Accounts' (which is underlined, indicating it's the active tab), 'Reporting', and 'Communications'. The right side of the header has icons for 'My account' and a search bar. The main area is titled 'Jobs Outstanding' and shows a table with columns: 'Job No.', 'Property', 'Contractor', 'Description', 'Contacted Date', and 'Completion Date'. Two jobs are listed: Job 392 (Flat 14 Westpoint, Northumberland Street, Darlington) and Job 393 (Natwest 28 Market Place, Barnard Castle). The 'Edit' button for Job 392 is highlighted with a red circle.

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 'Edit Job' screen. The top navigation tabs are 'Details', 'Attachments', 'Info', and 'Payment'. The 'Details' tab is active. The form includes fields for 'Job No.' (392), 'Title' (TB_GasHeating), 'Property' (Flat 14 Westpoint, Northumberland Street, Darlington), 'Record Type' (Landlord), 'Contractor' (Morgan Contracting), 'Record' (Oliver Hardy (Primary)), and 'Expense Category'. The 'Expense Category' field is highlighted with a red circle. Below it is a dropdown menu with options: Electric, Gas, Water, EPC, Windows, and Garden. At the bottom of the screen are buttons for 'Cancel', 'Another', 'Save', and 'Save & Pay Now'.



Job No. 392 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)

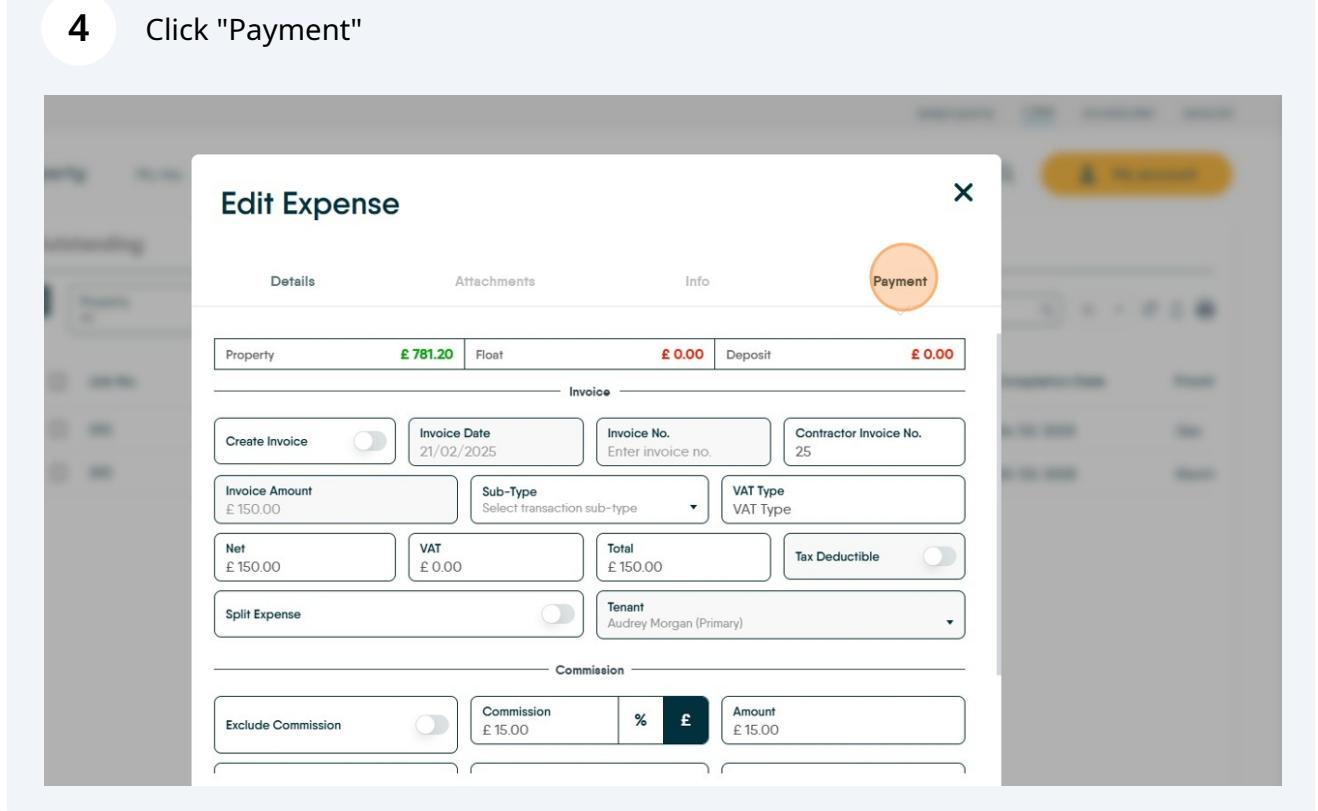
Expense Category Gas PM Job Category Gas Heating Priority Level Gas

Description NO heating checked pressure etc

Notes Enter notes

Cancel Another Save Save & Pay Now

4 Click "Payment"



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

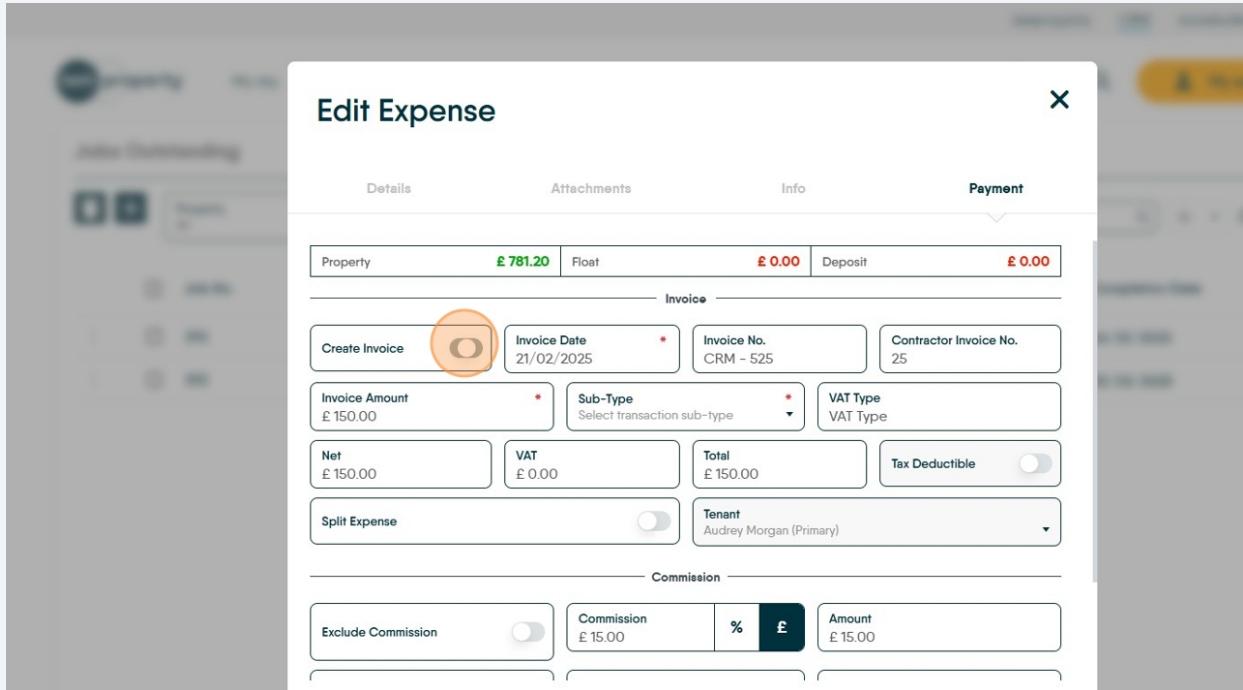
Split Expense Tenant Audrey Morgan (Primary)

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.



Details Attachments Info Payment

Property £ 781.20 Float £ 0.00 Deposit £ 0.00

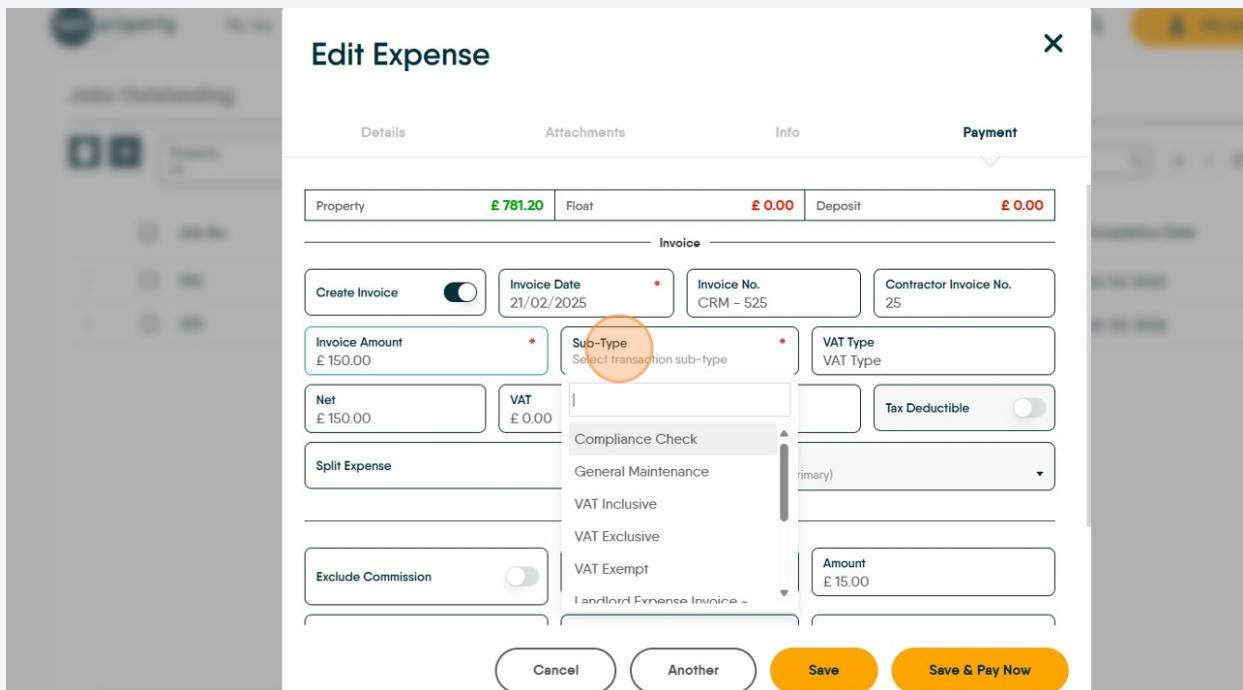
Invoice

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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6 Click "Select transaction sub-type"



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			Tax Deductible
Split Expense			

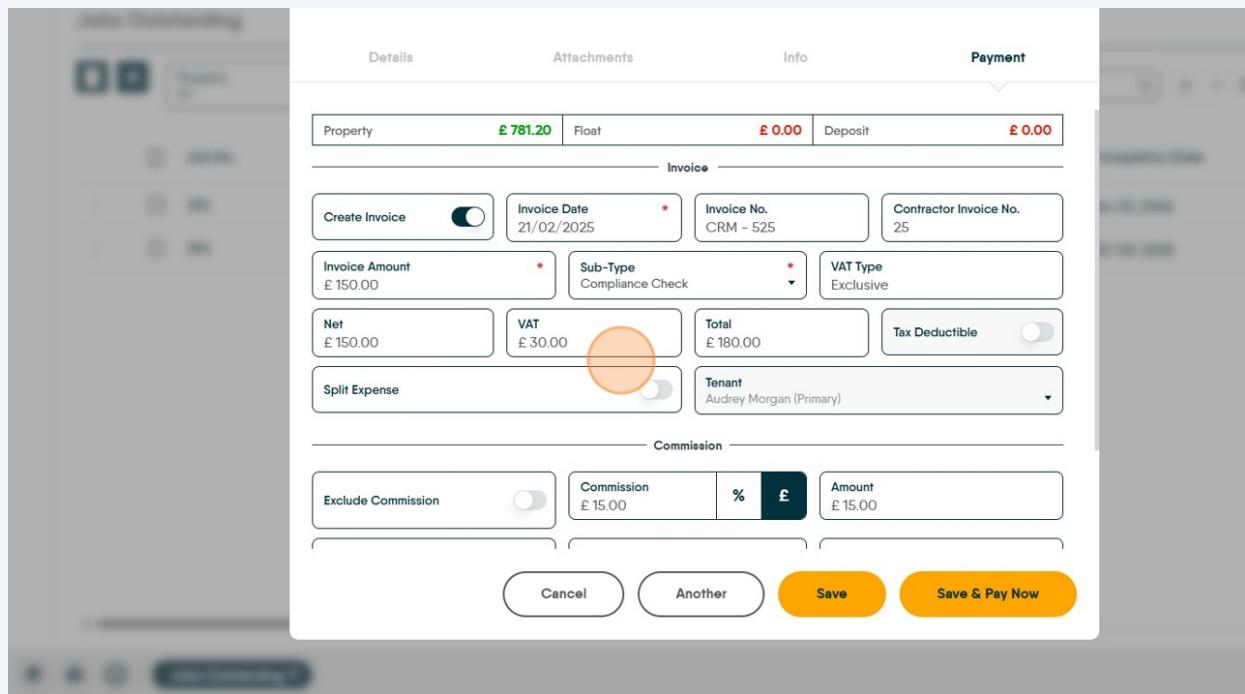
Commission

Exclude Commission	Commission £ 15.00	%	£	Amount £ 15.00
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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 'Invoice' tab of the Job Costing software. At the top, there are tabs for 'Details', 'Attachments', 'Info', and 'Payment'. The 'Payment' tab is currently selected. Below the tabs, there are several input fields and buttons. The 'Property' field shows £ 781.20. The 'Float' and 'Deposit' fields are both £ 0.00. Under the 'Invoice' section, there are fields for 'Create Invoice' (with a toggle switch), 'Invoice Date' (21/02/2025), 'Invoice No.' (CRM - 525), and 'Contractor Invoice No.' (25). The 'Invoice Amount' is £ 150.00. The 'Sub-Type' is 'Compliance Check'. The 'VAT Type' is 'Exclusive'. The 'Net' amount is £ 150.00, 'VAT' is £ 30.00, and the 'Total' is £ 180.00. The 'Tax Deductible' toggle switch is off. The 'Split Expense' toggle switch is highlighted with an orange circle. The 'Tenant' dropdown shows 'Audrey Morgan (Primary)'. Under the 'Commission' section, there is a 'Exclude Commission' toggle switch, a 'Commission' field set to £ 15.00, a percentage field (%), and an 'Amount' field set to £ 15.00. At the bottom, there are buttons for 'Cancel', 'Another', 'Save' (highlighted in orange), 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

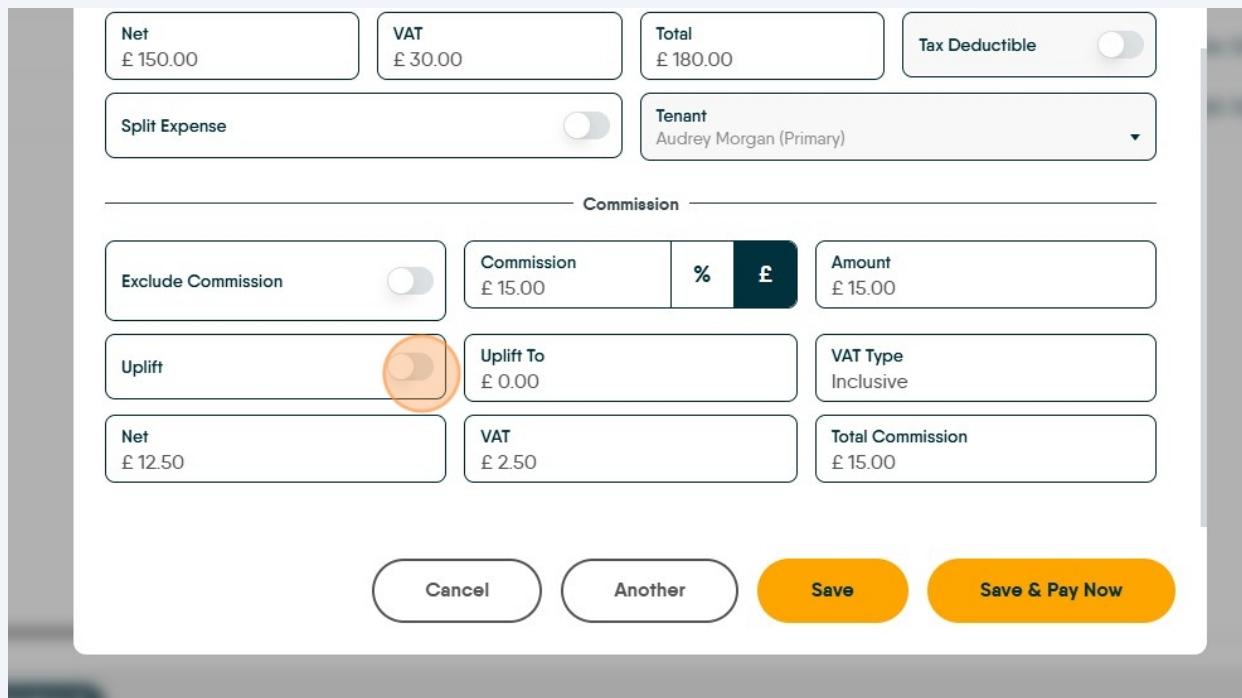
Exclude Commission <input type="checkbox"/>	Commission £ 15.00	% <input type="checkbox"/>	£ <input type="checkbox"/>	Amount £ 15.00
Uplift <input type="checkbox"/>	Uplift To £ 0.00	VAT Type Inclusive		
Net £ 12.50	VAT £ 2.50	Total Commission £ 15.00		

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.

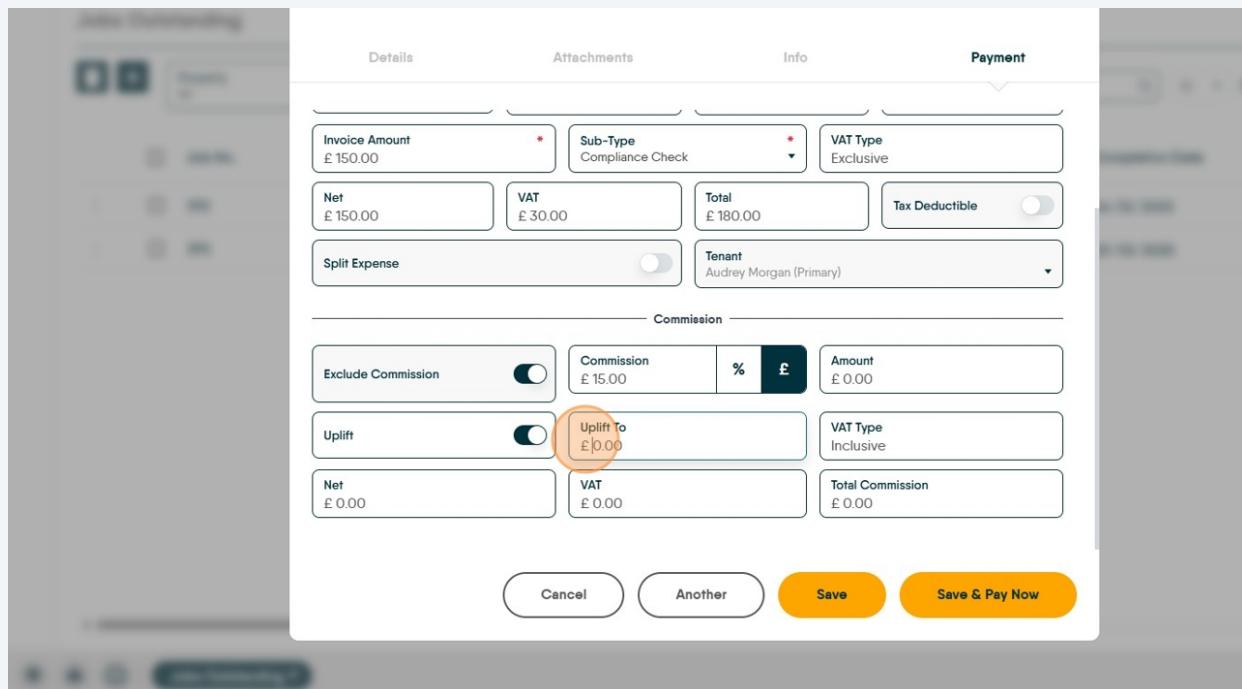
10 To add an 'Uplift' or charge to the Landlord, click here.



The screenshot shows a software interface for managing financial transactions. At the top, there are four boxes: 'Net £ 150.00', 'VAT £ 30.00', 'Total £ 180.00', and a 'Tax Deductible' toggle switch (off). Below these are two dropdowns: 'Split Expense' (off) and 'Tenant Audrey Morgan (Primary)'. A horizontal line labeled 'Commission' separates these from the main commission section. The 'Commission' section contains four boxes: 'Exclude Commission' (off), 'Commission £ 15.00' (with a percentage and pound sign icon), 'Amount £ 15.00', and 'Uplift' (with a toggle switch off and a value of £ 0.00). To the right of the 'Uplift' box is a 'VAT Type' dropdown set to 'Inclusive'. Below this are three more boxes: 'Net £ 12.50', 'VAT £ 2.50', and 'Total Commission £ 15.00'. At the bottom are four buttons: 'Cancel', 'Another', 'Save' (highlighted in orange), and '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.



The screenshot shows the same software interface as the previous one, but with the 'Uplift To' field filled with £120. The 'Uplift' toggle switch is now on. The rest of the interface remains the same, with the 'Commission' section showing the updated values and the 'Save' button highlighted in orange.