

# Collecting Rent via 'Rapid Collect' in iamproperty CRM Accounts



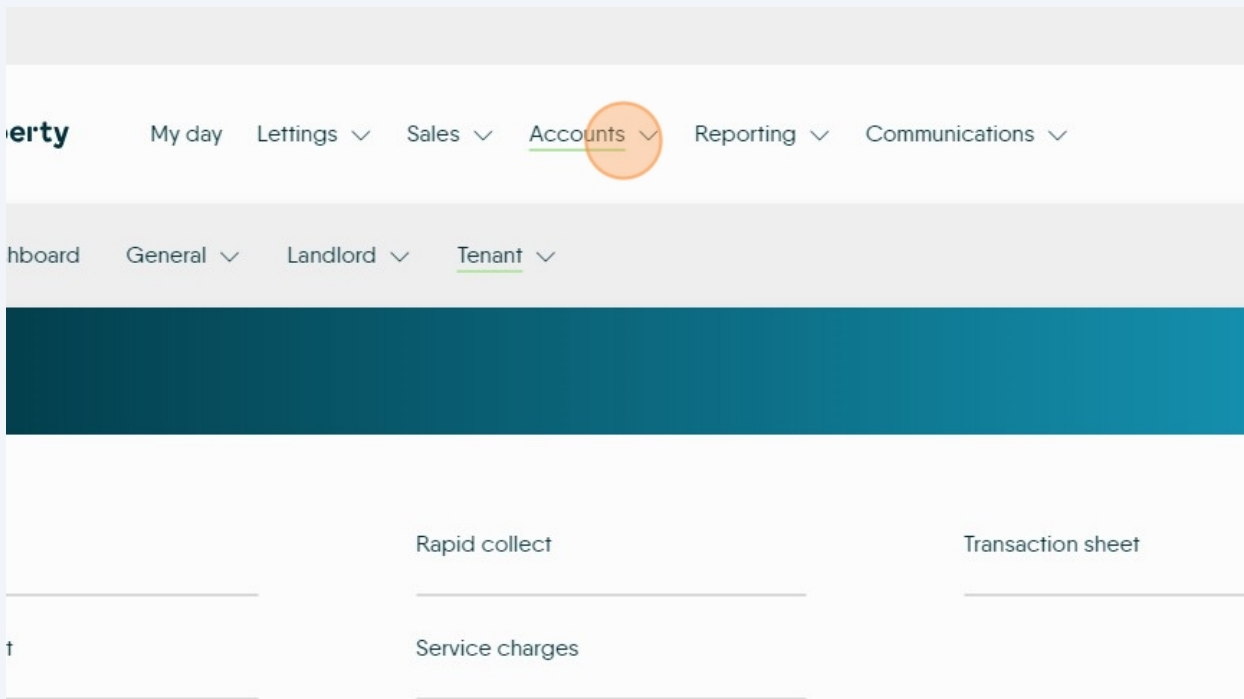
This guide provides a straightforward walk-through for using the 'Rapid Collect' feature in the iamproperty CRM, making rent collection efficient and user-friendly. Also shows how to part collect a rent payment in 'Rapid Collect'.

1

Navigate to <https://crm.iamproperty.com/Dashboards/Accounts?showModal=modalCollectRent>

2

Click "Accounts"  
Click "Rapid Collect"



## Tenant

Collect rent

Rapid collect

Transaction she

Invoice import

Service charges

3

You will then see the Rapid Collect screen, with all of the currently outstanding rents showing. Oldest debt shows first to change this click on the 'Days OS' column header to re sort.

iamproperty CRM movebutler iamsold

iamproperty My day Lettings ▾ Sales ▾ Accounts ▾ Reporting ▾ Communications ▾

My account

**Rapid Collect** Total Outstanding £21,641.36 Total to Collect £0.00

Date collected 21/11/2024 Bank account Morgan & Co Client Account Payment method Online Transfer Search 10

<input type="checkbox"/>	Tenant	Property	Due Date	Days OS	Invoice Amount	Amount OS	Amount Collected	Cheque No
<input type="checkbox"/>	Mark Wahlberg	40 Moor Avenue, Witney	28/09/2024	54	£1,000.00	£1,000.00	£1,000.00	
<input type="checkbox"/>	Applicant41	Bedroom 3, 63 Woodland Road, Darlington	25/10/2024	27	£150.00	£150.00	£150.00	
<input type="checkbox"/>	Letting Applicant81	4 Kingsway, Darlington	25/10/2024	27	£900.00	£800.00	£800.00	
<input type="checkbox"/>	applicant 79	18 Kingsway, Darlington	27/10/2024	25	£1,000.00	£1,000.00	£1,000.00	
<input type="checkbox"/>	Mark Wahlberg	40 Moor Avenue, Witney	28/10/2024	24	£1,000.00	£1,000.00	£1,000.00	
<input type="checkbox"/>	Lettings applicant30	92 Pelaw Crescent, Chester le Street	30/10/2024	22	£750.00	£450.00	£450.00	
<input type="checkbox"/>	Lloyd Morgan	8974 Kingsway, Darlington	30/10/2024	22	£1,300.00	£300.00	£300.00	
<input type="checkbox"/>	Vendor Vendor10	359 Yew Tree Close, Hurworth, Darlington	31/10/2024	21	£1,200.00	£1,200.00	£1,200.00	
<input type="checkbox"/>	Margaret Morgan	359 Yew Tree Close, Hurworth, Darlington	01/11/2024	20	£1,300.00	£600.00	£600.00	
<input type="checkbox"/>	lettings Applicant demo	712 Pelaw Crescent, Chester le Street	01/11/2024	20	£925.00	£925.00	£925.00	

Rapid Collect X

4

Click the checkbox next to each rent you wish to collect. Click this checkbox.

Date collected  
21/11/2024

Bank account  
Select bank account

Payment method  
Select payment method

<input type="checkbox"/>	Tenant	Property	Due Date	Days OS
<input type="checkbox"/>	Mark Wahlberg	40 Moor Avenue, Witney	28/09/2024	54
<input type="checkbox"/>	Lettings Applicant72	16 Yew Tree Close, Hurworth, Darlington	21/10/2024	31
<input type="checkbox"/>	wilma morgan demo	Bedroom 2, 63 Woodland Road, Darlington	23/10/2024	29
<input type="checkbox"/>	Applicant41	Bedroom 3, 63 Woodland Road, Darlington	25/10/2024	27
<input type="checkbox"/>	Letting Applicant81	4 Kingsway, Darlington	25/10/2024	27
<input type="checkbox"/>	applicant 79	18 Kingsway, Darlington	27/10/2024	25
<input type="checkbox"/>	Mark Wahlberg	40 Moor Avenue, Witney	28/10/2024	24

21/11/2024

Bank account  
Select bank account

Payment method  
Select payment method

☒

Tenant

Property

Due Date

Days OS

<input type="checkbox"/>	Mark Wahlberg	40 Moor Avenue, Witney	28/09/2024	54
<input checked="" type="checkbox"/>	Lettings Applicant72	16 Yew Tree Close, Hurworth, Darlington	21/10/2024	31
<input checked="" type="checkbox"/>	wilma morgan demo	Bedroom 2, 63 Woodland Road, Darlington	23/10/2024	29
<input type="checkbox"/>	Applicant41	Bedroom 3, 63 Woodland Road, Darlington	25/10/2024	27
<input type="checkbox"/>	Letting Applicant81	4 Kingsway, Darlington	25/10/2024	27
<input type="checkbox"/>	applicant 79	18 Kingsway, Darlington	27/10/2024	25
<input type="checkbox"/>	Mark Wahlberg	40 Moor Avenue, Witney	28/10/2024	24
<input type="checkbox"/>	Lettings Applicant34	69 Kingsway, Darlington	29/10/2024	23

<input checked="" type="checkbox"/>	wilma morgan demo	Bedroom 2, 63 Woodland Road, Darlington	23/10/2024	29
<input type="checkbox"/>	Applicant41	Bedroom 3, 63 Woodland Road, Darlington	25/10/2024	27
<input type="checkbox"/>	Letting Applicant81	4 Kingsway, Darlington	25/10/2024	27
<input type="checkbox"/>	applicant 79	18 Kingsway, Darlington	27/10/2024	25
<input type="checkbox"/>	Mark Wahlberg	40 Moor Avenue, Witney	28/10/2024	24
<input type="checkbox"/>	Lettings Applicant34	69 Kingsway, Darlington	29/10/2024	23
<input type="checkbox"/>	John Alfred morgan	1 Spruce Grove, Darlington	30/10/2024	22
<input type="checkbox"/>	Lettings applicant30	92 Pelaw Crescent, Chester le Street	30/10/2024	22



Rapid Collect X

<input checked="" type="checkbox"/>	wilma morgan demo	Bedroom 2, 63 Woodland Road, Darlington	23/10/2024	29
<input type="checkbox"/>	Applicant41	Bedroom 3, 63 Woodland Road, Darlington	25/10/2024	27
<input type="checkbox"/>	Letting Applicant81	4 Kingsway, Darlington	25/10/2024	27
<input type="checkbox"/>	applicant 79	18 Kingsway, Darlington	27/10/2024	25
<input type="checkbox"/>	Mark Wahlberg	40 Moor Avenue, Witney	28/10/2024	24
<input checked="" type="checkbox"/>	Lettings Applicant34	69 Kingsway, Darlington	29/10/2024	23
<input checked="" type="checkbox"/>	John Alfred morgan	1 Spruce Grove, Darlington	30/10/2024	22
<input type="checkbox"/>	Lettings applicant30	92 Pelaw Crescent, Chester le Street	30/10/2024	22



Rapid Collect X

<input checked="" type="checkbox"/>	wilma morgan demo	Bedroom 2, 63 Woodland Road, Darlington	23/10/2024	29
<input type="checkbox"/>	Applicant41	Bedroom 3, 63 Woodland Road, Darlington	25/10/2024	27
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<input type="checkbox"/>	Mark Wahlberg	40 Moor Avenue, Witney	28/10/2024	24
<input checked="" type="checkbox"/>	Lettings Applicant34	69 Kingsway, Darlington	29/10/2024	23
<input checked="" type="checkbox"/>	John Alfred morgan	1 Spruce Grove, Darlington	30/10/2024	22
<input checked="" type="checkbox"/>	Lettings applicant30	92 Pelaw Crescent, Chester le Street	30/10/2024	22



Rapid Collect X


5

To change the amount collected click into the 'Outstanding' ( "£ 750.00") field and change the amount to the amount collected.

A lower amount will leave a debt still to cover an overpayment will create unallocated funds to pay against another invoice.

10/2024	29	£ 150.00	£ 150.00	£ 150.00	
10/2024	27	£ 150.00	£ 150.00	£ 150.00	
10/2024	27	£ 900.00	£ 800.00	£ 800.00	
10/2024	25	£ 1,000.00	£ 1,000.00	£ 1, 000.00	
10/2024	24	£ 1,000.00	£ 1,000.00	£ 1, 000.00	
10/2024	23	£ 600.00	£ 600.00	£ 600.00	
10/2024	22	£ 800.00	£ 800.00	£ 800.00	
10/2024	22	£ 750.00	£ 750.00	750	

6 Click "Select bank account" select your main client account


 My day Lettings ▾ Sales ▾ Accounts ▾ Reporting ▾ Communications

### Rapid Collect

Date collected  
21/11/2024

Bank account  
Select bank account

Payment method  
Select payment method

	Tenant	Property	Due Date	Days OS
<input type="checkbox"/>	Mark Wahlberg	40 Moor Avenue, Witney	28/09/2024	54
<input checked="" type="checkbox"/>	Lettings Applicant72	16 Yew Tree Close, Hurworth, Darlington	21/10/2024	31
<input checked="" type="checkbox"/>	wilma morgan demo	Bedroom 2, 63 Woodland Road, Darlington	23/10/2024	29

7 Click "Select payment method" select how the payments where made. This covers all payments made and will most likely be Bank Transfer

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


Total Outstanding

\*

Bank account  
Morgan& Co Client Account

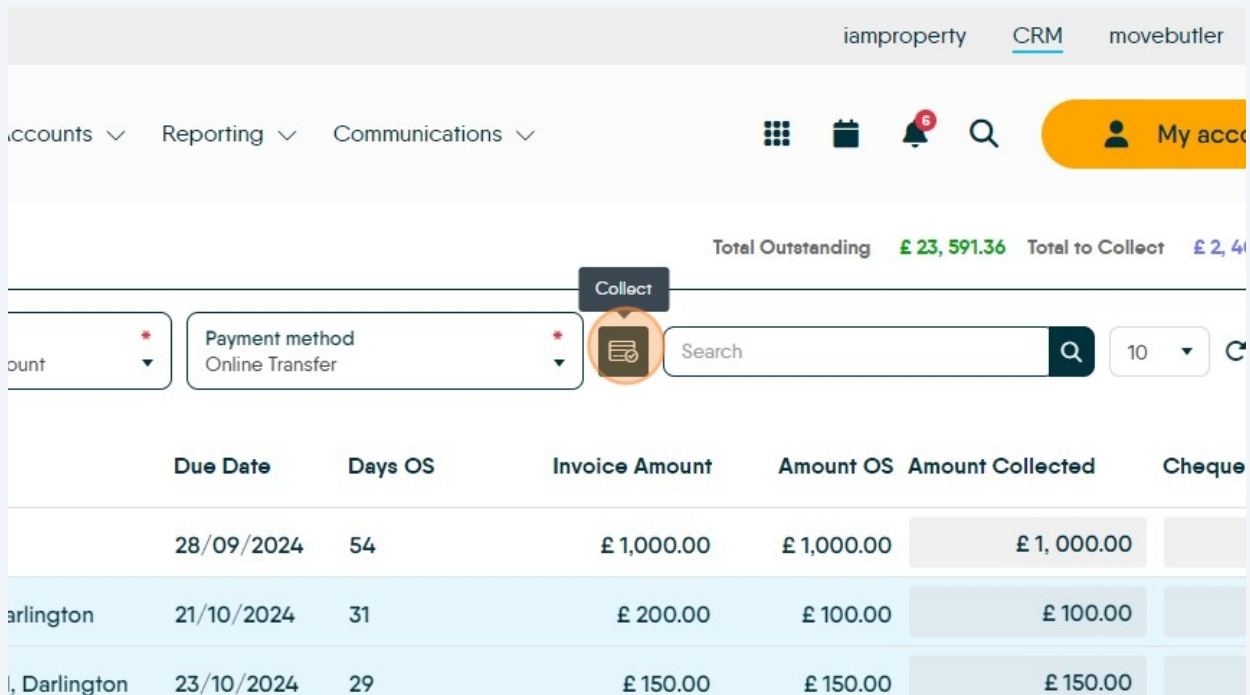
\*

Payment method  
Select payment method

 Search

	Property	Due Date	Days OS	Invoice Amount	Amount
	40 Moor Avenue, Witney	28/09/2024	54	£ 1,000.00	£ 1,000.00
2	16 Yew Tree Close, Hurworth, Darlington	21/10/2024	31	£ 200.00	£ 100.00
>	Bedroom 2, 63 Woodland Road, Darlington	23/10/2024	29	£ 150.00	£ 150.00

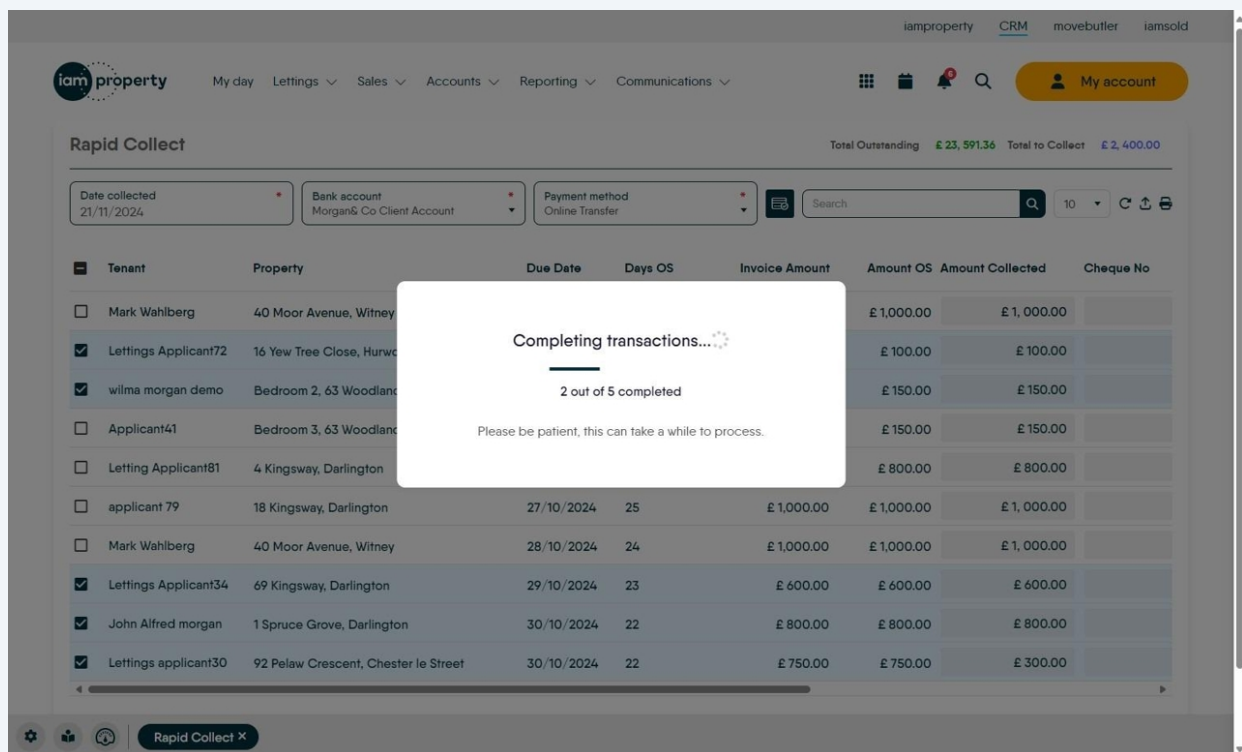
8 Click here to collect all the selected Rent payments.



The screenshot shows the iamproperty CRM interface. At the top, there are navigation links for 'iamproperty', 'CRM', and 'movebutler'. Below this, there are tabs for 'accounts', 'Reporting', and 'Communications'. A 'Collect' button is highlighted with an orange circle. Below the button, there is a search bar and a dropdown menu for 'Payment method' set to 'Online Transfer'. A table of rent payments is displayed below the search bar.

	Due Date	Days OS	Invoice Amount	Amount OS	Amount Collected	Cheque
	28/09/2024	54	£ 1,000.00	£ 1,000.00	£ 1, 000.00	
arlington	21/10/2024	31	£ 200.00	£ 100.00	£ 100.00	
, Darlington	23/10/2024	29	£ 150.00	£ 150.00	£ 150.00	

9 Once 'Collect' is clicked you will see this screen showing a countdown of the transactions completed.



The screenshot shows the iamproperty CRM interface with the 'Rapid Collect' screen. A modal dialog is displayed in the center, indicating that transactions are being completed. The dialog text reads: 'Completing transactions...', '2 out of 5 completed', and 'Please be patient, this can take a while to process.' The background shows a table of rent payments with columns for Tenant, Property, Due Date, Days OS, Invoice Amount, Amount OS, Amount Collected, and Cheque No.

Tenant	Property	Due Date	Days OS	Invoice Amount	Amount OS	Amount Collected	Cheque No
Mark Wahlberg	40 Moor Avenue, Witney			£ 1,000.00	£ 1,000.00		
Lettings Applicant72	16 Yew Tree Close, Hurw			£ 100.00	£ 100.00		
wilma morgan demo	Bedroom 2, 63 Woodlan			£ 150.00	£ 150.00		
Applicant41	Bedroom 3, 63 Woodlan			£ 150.00	£ 150.00		
Letting Applicant81	4 Kingsway, Darlington			£ 800.00	£ 800.00		
applicant 79	18 Kingsway, Darlington	27/10/2024	25	£ 1,000.00	£ 1,000.00	£ 1, 000.00	
Mark Wahlberg	40 Moor Avenue, Witney	28/10/2024	24	£ 1,000.00	£ 1,000.00	£ 1, 000.00	
Lettings Applicant34	69 Kingsway, Darlington	29/10/2024	23	£ 600.00	£ 600.00	£ 600.00	
John Alfred morgan	1 Spruce Grove, Darlington	30/10/2024	22	£ 800.00	£ 800.00	£ 800.00	
Lettings applicant30	92 Pelaw Crescent, Chester le Street	30/10/2024	22	£ 750.00	£ 750.00	£ 300.00	