

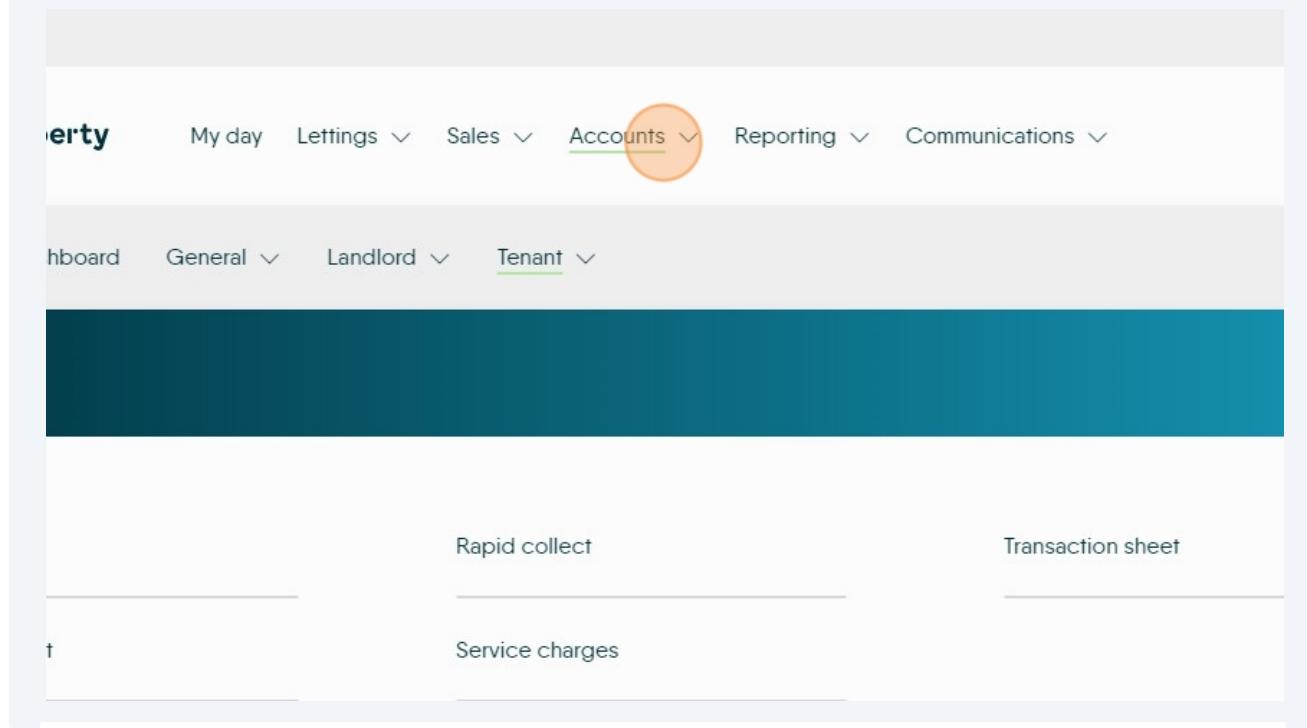
Collecting Rent via 'Rapid Collect' in iamproperty CRM Accounts

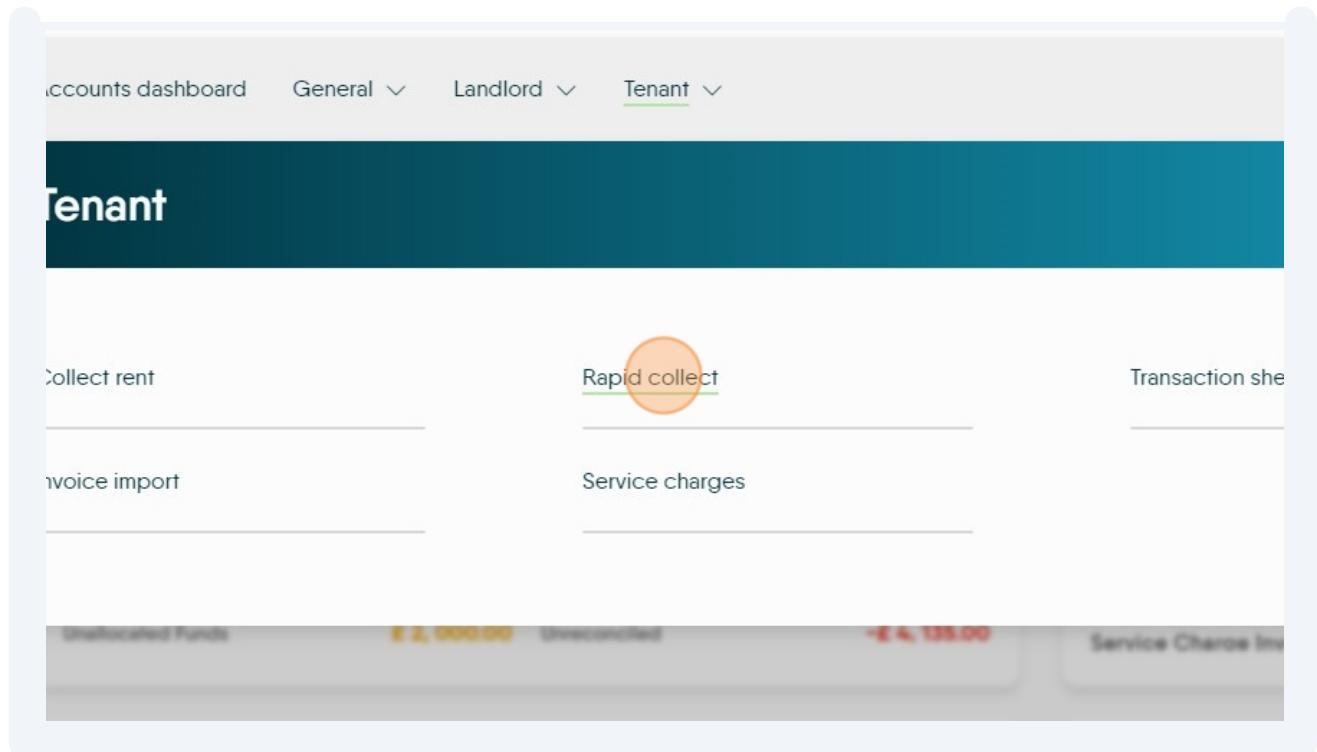


This guide provides a straightforward walk-through for using the 'Rapid Collect' feature in the iamproperty CRM, making rent collection efficient and user-friendly. Also shows how to part collect a rent payment in 'Rapid Collect'.

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

- 2 Click "Accounts"
Click "Rapid Collect"





Accounts dashboard General ▾ Landlord ▾ Tenant ▾

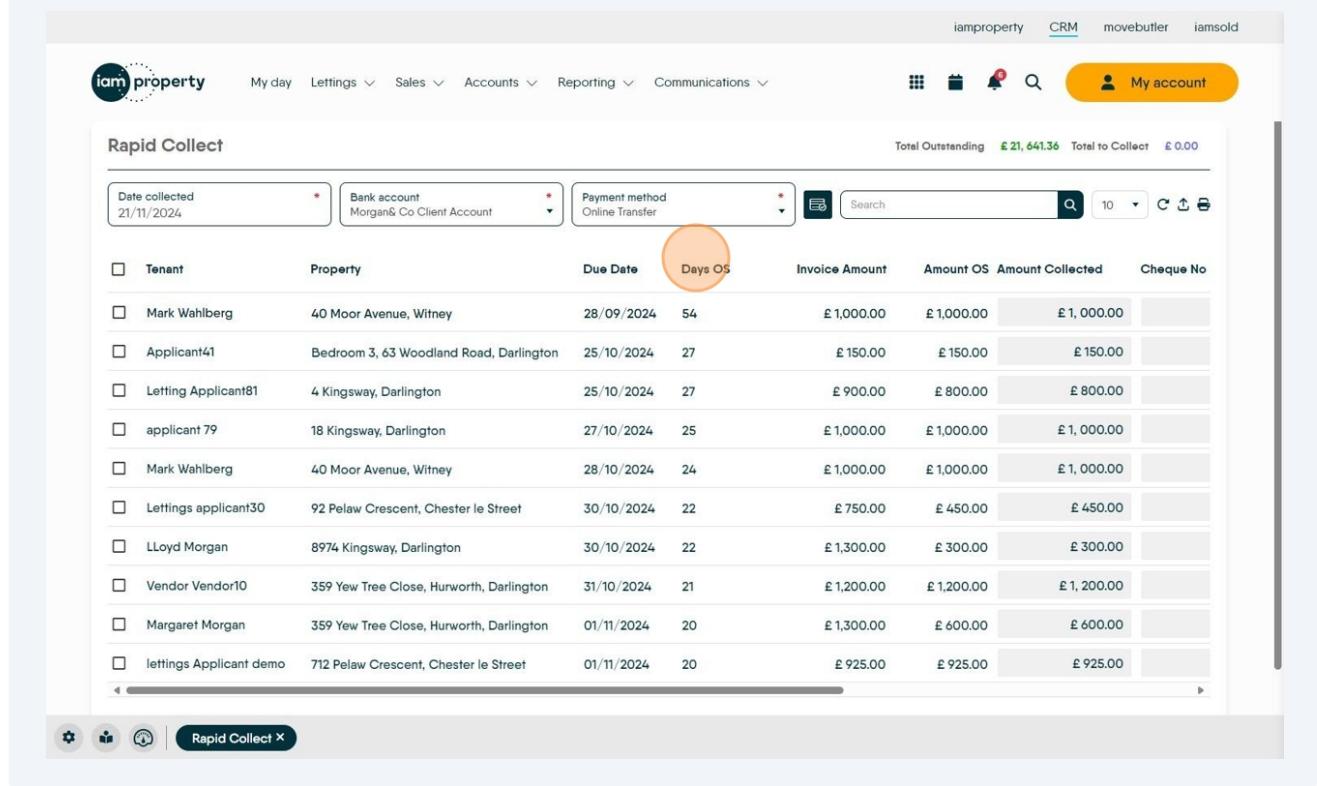
Tenant

Collect rent Rapid collect Transaction she

Invoice import Service charges

Unallocated Funds £ 2,000.00 Unreconciled -£ 4,135.00 Service Charge Due

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

iam property My day Lettings ▾ Sales ▾ Accounts ▾ Reporting ▾ Communications ▾ My account

Rapid Collect

Total Outstanding £ 21,641.36 Total to Collect £ 0.00

Date collected	Bank account	Payment method	Days OS	Invoice Amount	Amount OS	Amount Collected	Cheque No
21/11/2024	Morgan&Co Client Account	Online Transfer	54	£ 1,000.00	£ 1,000.00	£ 1,000.00	
Mark Wahlberg	40 Moor Avenue, Witney	28/09/2024	27	£ 150.00	£ 150.00	£ 150.00	
Applicant41	Bedroom 3, 63 Woodland Road, Darlington	25/10/2024	27	£ 900.00	£ 800.00	£ 800.00	
Letting Applicant81	4 Kingsway, Darlington	25/10/2024	25	£ 1,000.00	£ 1,000.00	£ 1,000.00	
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 applicant30	92 Pelaw Crescent, Chester le Street	30/10/2024	22	£ 750.00	£ 450.00	£ 450.00	
Lloyd Morgan	8974 Kingsway, Darlington	30/10/2024	22	£ 1,300.00	£ 300.00	£ 300.00	
Vendor Vendor10	359 Yew Tree Close, Hurworth, Darlington	31/10/2024	21	£ 1,200.00	£ 1,200.00	£ 1,200.00	
Margaret Morgan	359 Yew Tree Close, Hurworth, Darlington	01/11/2024	20	£ 1,300.00	£ 600.00	£ 600.00	
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	*	Bank account	*	Payment method
21/11/2024		Select bank account	▼	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 checked="" 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	▼	Select payment method
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<input type="checkbox"/>	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

<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

<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 checked="" type="checkbox"/>	Lettings applicant30	92 Pelaw Crescent, Chester le Street	30/10/2024	22

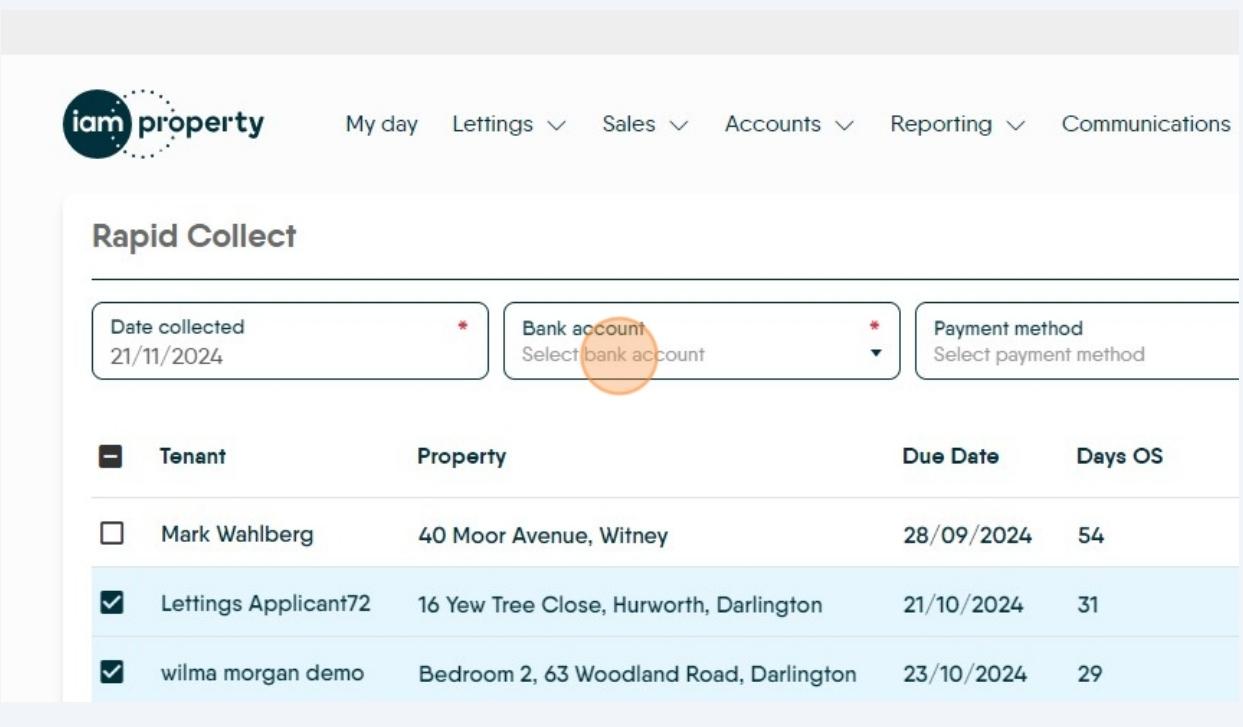
   | **Rapid Collect** X

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	

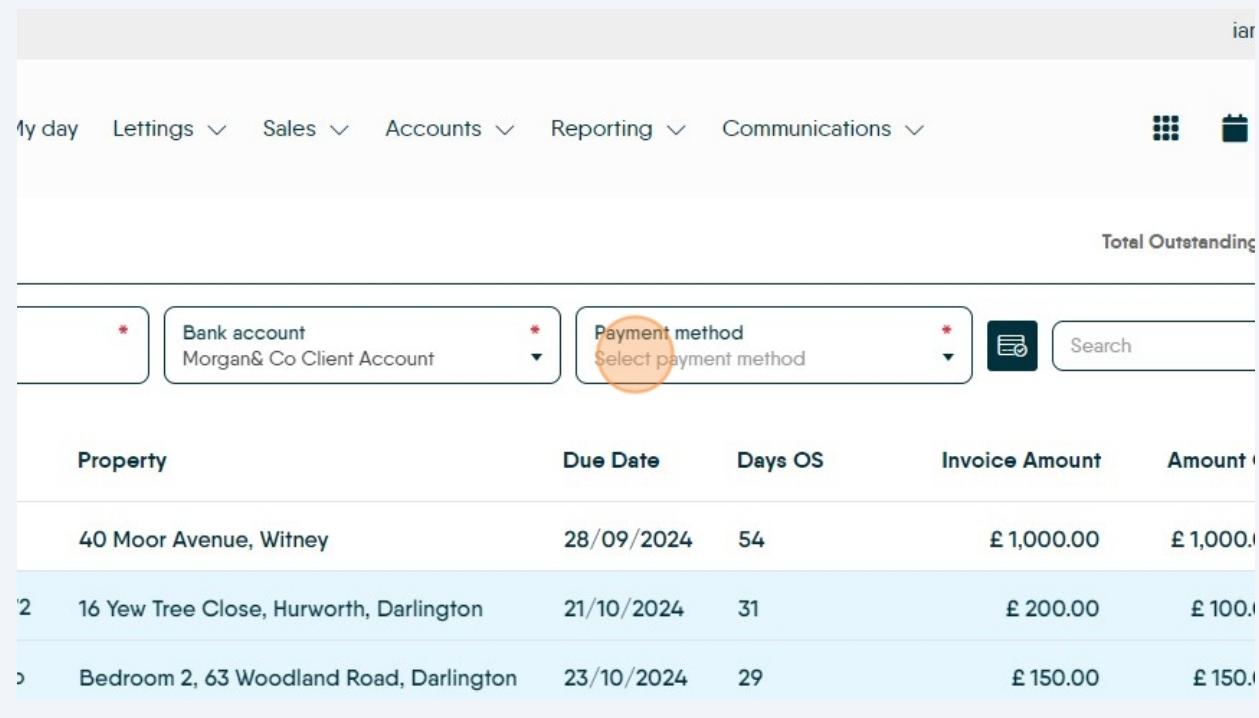
6 Click "Select bank account" select your main client account



The screenshot shows the 'Rapid Collect' section of the software. At the top, there are three input fields: 'Date collected' (21/11/2024), 'Bank account' (with a dropdown menu showing 'Select bank account'), and 'Payment method' (with a dropdown menu showing 'Select payment method'). Below these fields is a table with columns: 'Tenant', 'Property', 'Due Date', and 'Days OS'. There are four rows in the table, each representing a tenant with their property address, due date, and days outstanding. The second row, 'Lettings Applicant72', is highlighted with a light blue background.

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

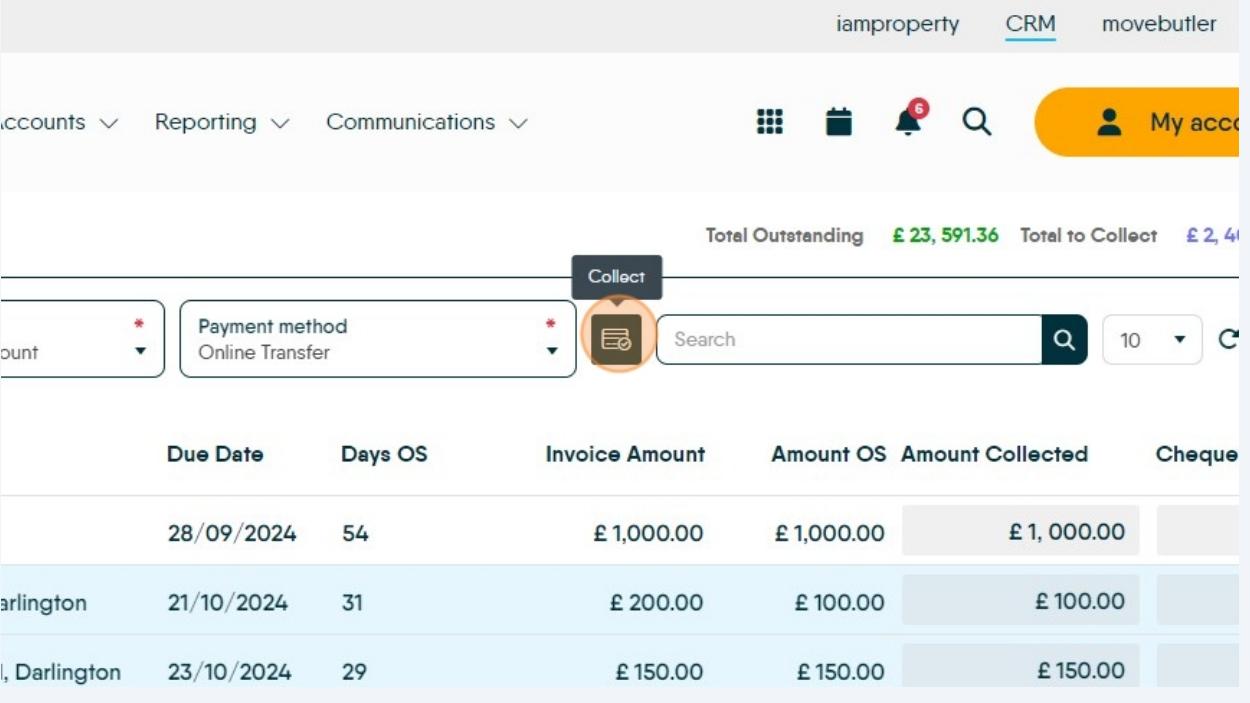
7 Click "Select payment method" select how the payments where made. This covers all payments made and will most likely be Bank Transfer



The screenshot shows the 'Total Outstanding' section of the software. At the top, there are three input fields: 'Bank account' (Morgan& Co Client Account) and 'Payment method' (with a dropdown menu showing 'Select payment method'). Below these fields is a table with columns: 'Property', 'Due Date', 'Days OS', 'Invoice Amount', and 'Amount'. There are three rows in the table, each representing a property with its due date, days outstanding, invoice amount, and total amount. The first row, '40 Moor Avenue, Witney', is highlighted with a light blue background.

Property	Due Date	Days OS	Invoice Amount	Amount
40 Moor Avenue, Witney	28/09/2024	54	£ 1,000.00	£ 1,000.00
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

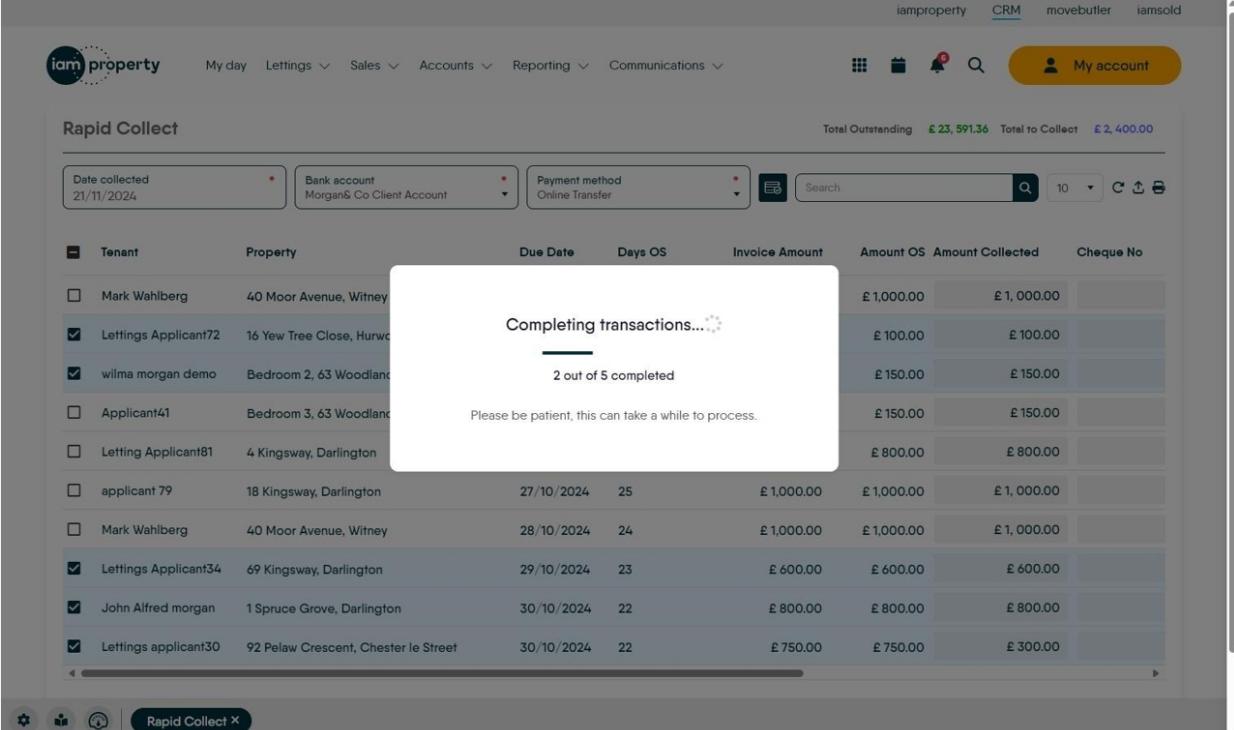
8 Click here to collect all the selected Rent payments.



The screenshot shows the iamproperty software interface. At the top, there are navigation tabs: 'Accounts' (with a dropdown arrow), 'Reporting' (with a dropdown arrow), 'Communications' (with a dropdown arrow), 'CRM', and 'movebutler'. Below the tabs, there are several icons: a grid, a calendar, a bell with a red notification dot (showing 6), a magnifying glass, and a user profile icon with the text 'My account'. The main area displays financial data: 'Total Outstanding' (£ 23, 591.36) and 'Total to Collect' (£ 2, 400.00). Below this, there is a search bar with a placeholder 'Search' and a dropdown menu set to '10'. A large 'Collect' button is prominently displayed. To the left of the 'Collect' button, there are dropdown menus for 'Count' (with a red asterisk) and 'Payment method' (set to 'Online Transfer', also with a red asterisk). The main table lists three transactions:

Due Date	Days OS	Invoice Amount	Amount OS	Amount Collected	Cheque No
28/09/2024	54	£ 1,000.00	£ 1,000.00	£ 1,000.00	
21/10/2024	31	£ 200.00	£ 100.00	£ 100.00	
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 software interface with the 'Rapid Collect' feature. At the top, there are navigation tabs: 'My day', 'Lettings' (with a dropdown arrow), 'Sales' (with a dropdown arrow), 'Accounts' (with a dropdown arrow), 'Reporting' (with a dropdown arrow), 'Communications' (with a dropdown arrow), 'CRM', 'movebutler', and 'iamsold'. Below the tabs, there are icons for a grid, a calendar, a bell with a red notification dot, a magnifying glass, and a user profile icon with the text 'My account'. The main area displays financial data: 'Total Outstanding' (£ 23, 591.36) and 'Total to Collect' (£ 2, 400.00). The 'Rapid Collect' section includes dropdown menus for 'Date collected' (21/11/2024), 'Bank account' (Morgan & Co Client Account), and 'Payment method' (Online Transfer). The main table lists transactions with checkboxes for 'Tenant' and 'Property'. A modal window is open, showing a progress bar and the message 'Completing transactions... 2 out of 5 completed'. Below the progress bar, a note says 'Please be patient, this can take a while to process.' The table data is as follows:

Tenant	Property	Due Date	Days OS	Invoice Amount	Amount OS	Amount Collected	Cheque No
Mark Wahlberg	40 Moor Avenue, Witney	27/10/2024	25	£ 1,000.00	£ 1,000.00	£ 1,000.00	
Lettings Applicant72	16 Yew Tree Close, Hurworth	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	