

Pre-paying Rent for a Tenant



This guide provides a straightforward method for you to pre-pay rent on behalf of tenants who pay early.

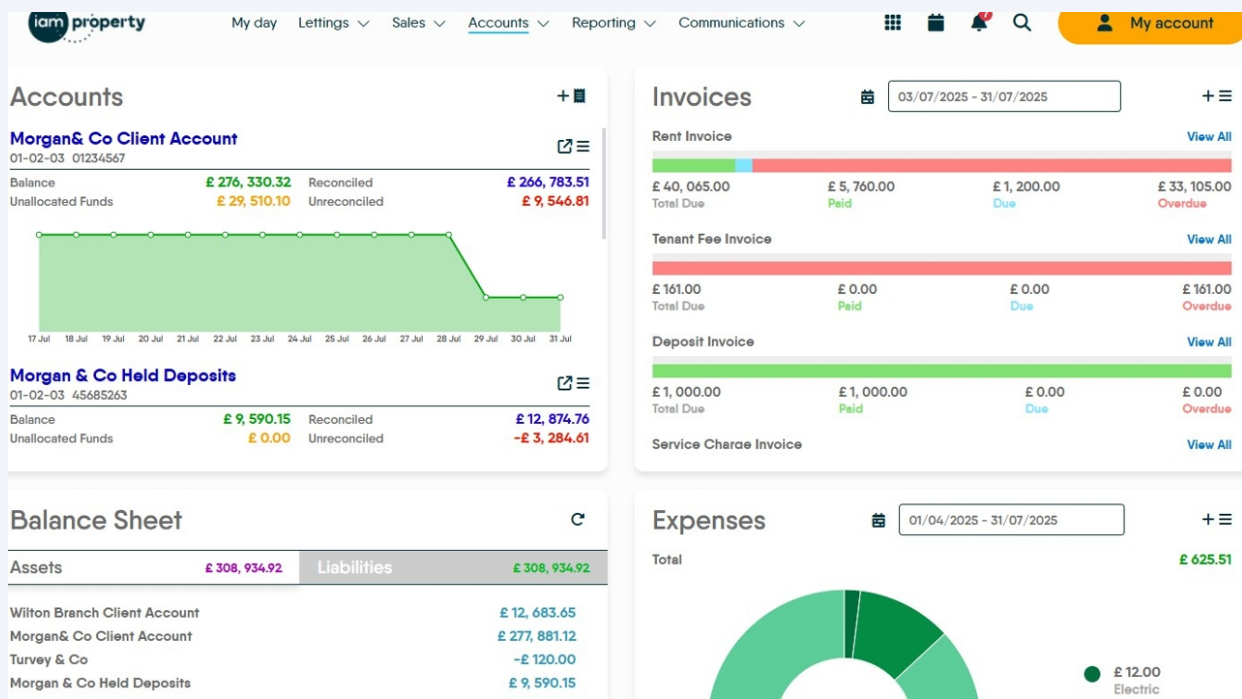
By following the outlined steps, you can easily and efficiently manage tenant accounts. This resource is essential for anyone looking to streamline their rent collection process and maintain positive tenant relationships.

1

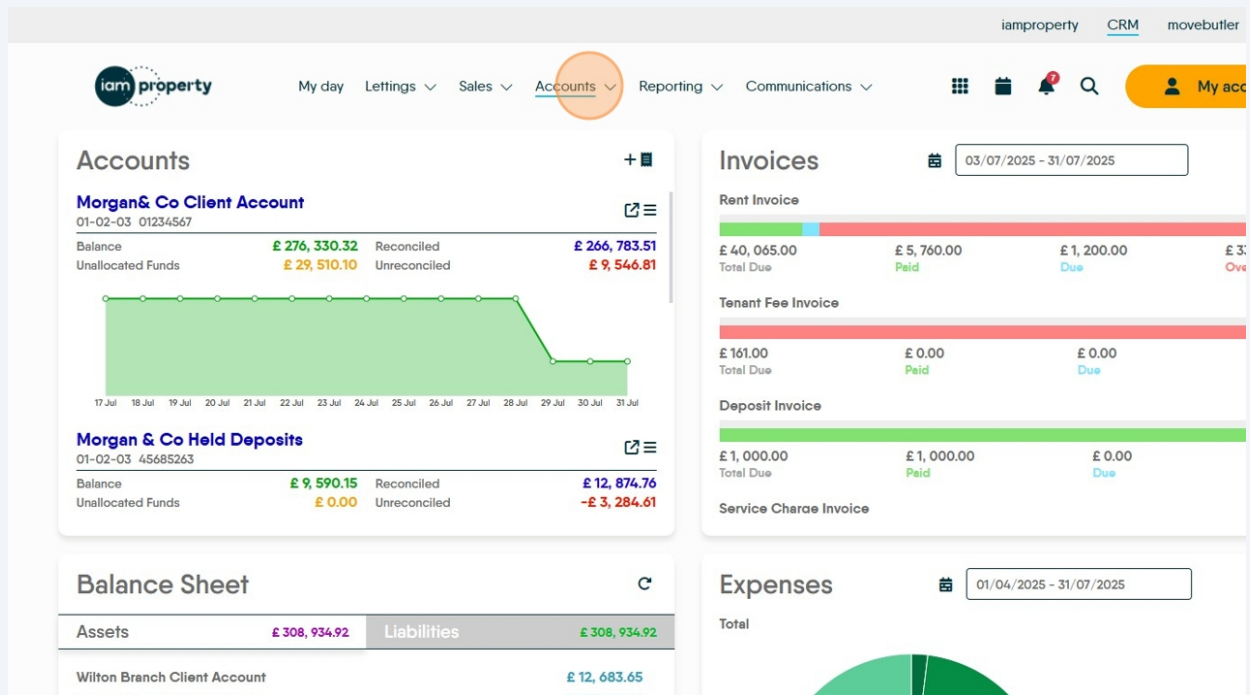
This process is to collect a rent payment paid to you before the Rent Invoice is created by CRM. Any rent payment collected this way will be available to pay to the landlord straight away.

2

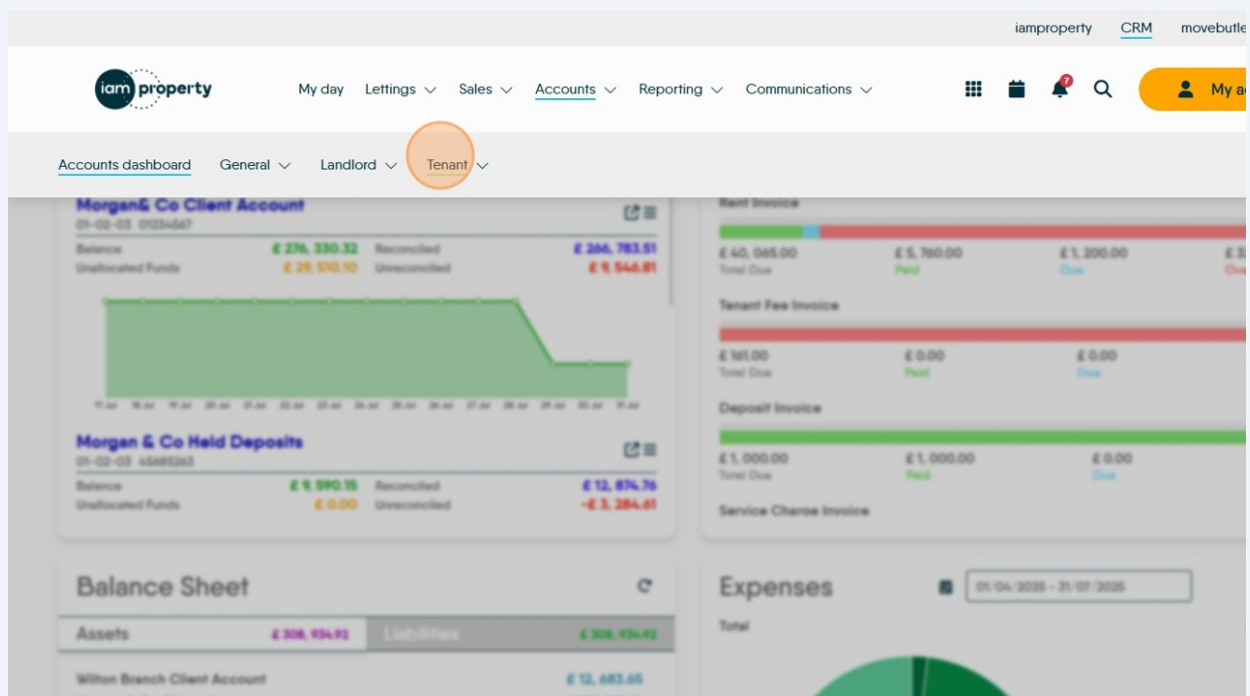
Navigate to <https://crm.iamproperty.com/Dashboards/Accounts>



3 Click "Accounts"

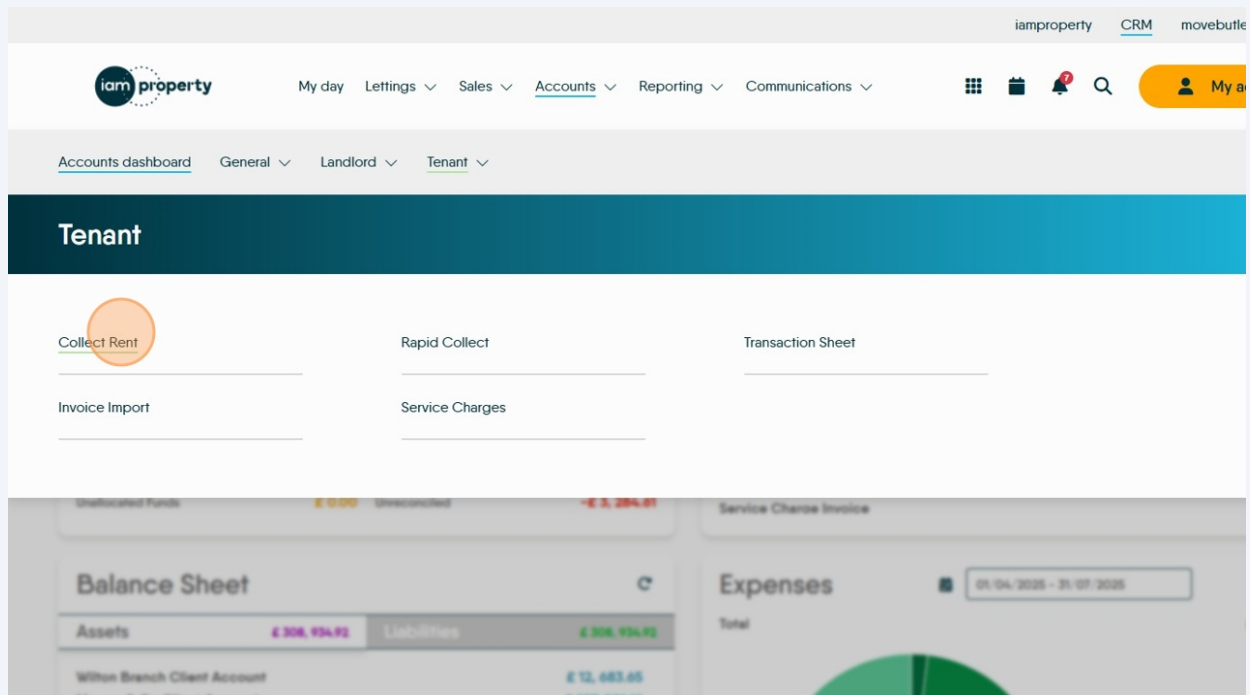


4 Click "Tenant"



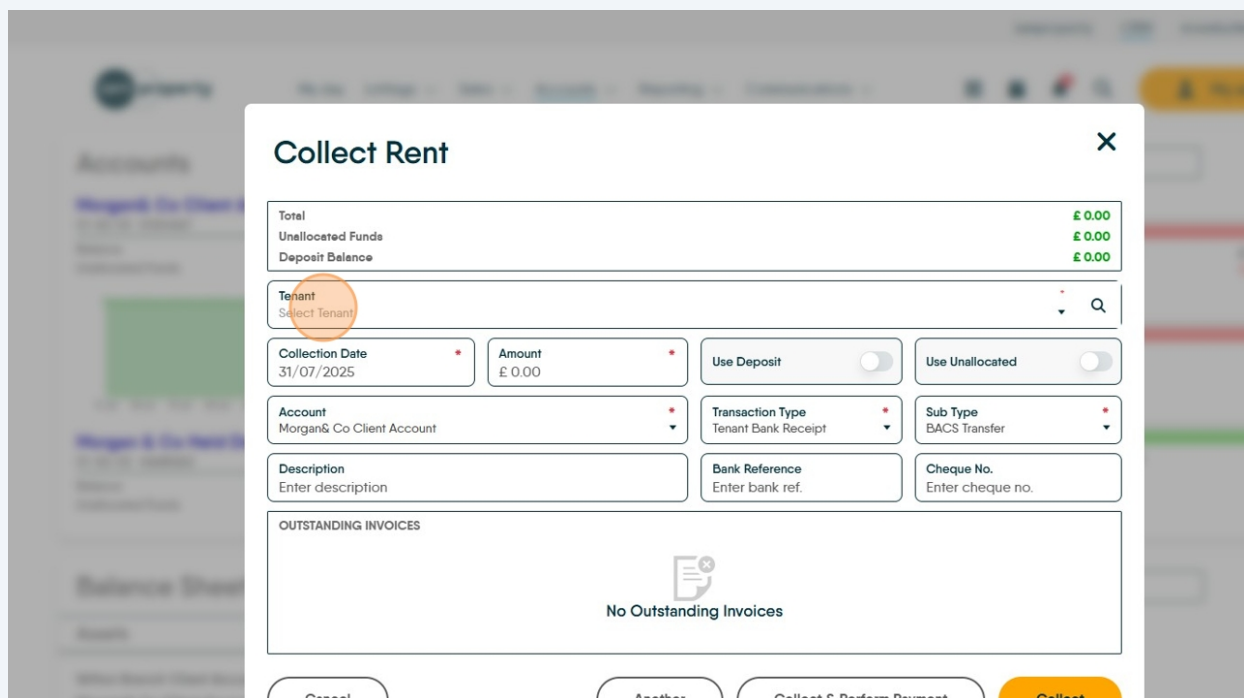
5

Click "Collect Rent" this is the best area to search for and register a pre paid rent payment.



6

Click "Select Tenant" if the tenant name is in this drop down menu they have an outstanding rental invoice to be paid before you can pre pay a future dated rent.



Collect Rent

Total £ 0.00
Unallocated Funds £ 0.00
Deposit Balance £ 0.00

Tenant
Select Tenant

Letting Applicant107 (£4800.00) - 771 Pelaw Crescent, Chester le Street - No Bank Ref.
lettings applicant102 (£4200.00) - 919 Pelaw Crescent, Chester le Street - 919PelawLA102
Lettings Applicant103 (£4200.00) - 111 Yew Tree Close, Hurworth, Darlington - No Bank Ref.
Lettings applicant104 (£4000.00) - Bedroom 8, 63 Woodland Road, Darlington - No Bank Ref.
applicant105 (£3600.00) - 822 Pelaw Crescent, Chester le Street - No Bank Ref.
Lettings Applicant108 (£3600.00) - 711 Pelaw Crescent, Chester le Street - No Bank Ref.

No Outstanding Invoices

Cancel Another Collect & Perform Payment Collect

7

If the Tenant does not appear in the drop down menu you can prepay a future rent. Click onto the search icon.

Collect Rent

Total £ 0.00
Unallocated Funds £ 0.00
Deposit Balance £ 0.00

Tenant
Select Tenant

Switch to Search

Collection Date 31/07/2025 Amount £ 0.00 Use Deposit Use Unallocated

Account Morgan& Co Client Account Transaction Type Tenant Bank Receipt Sub Type BACS Transfer

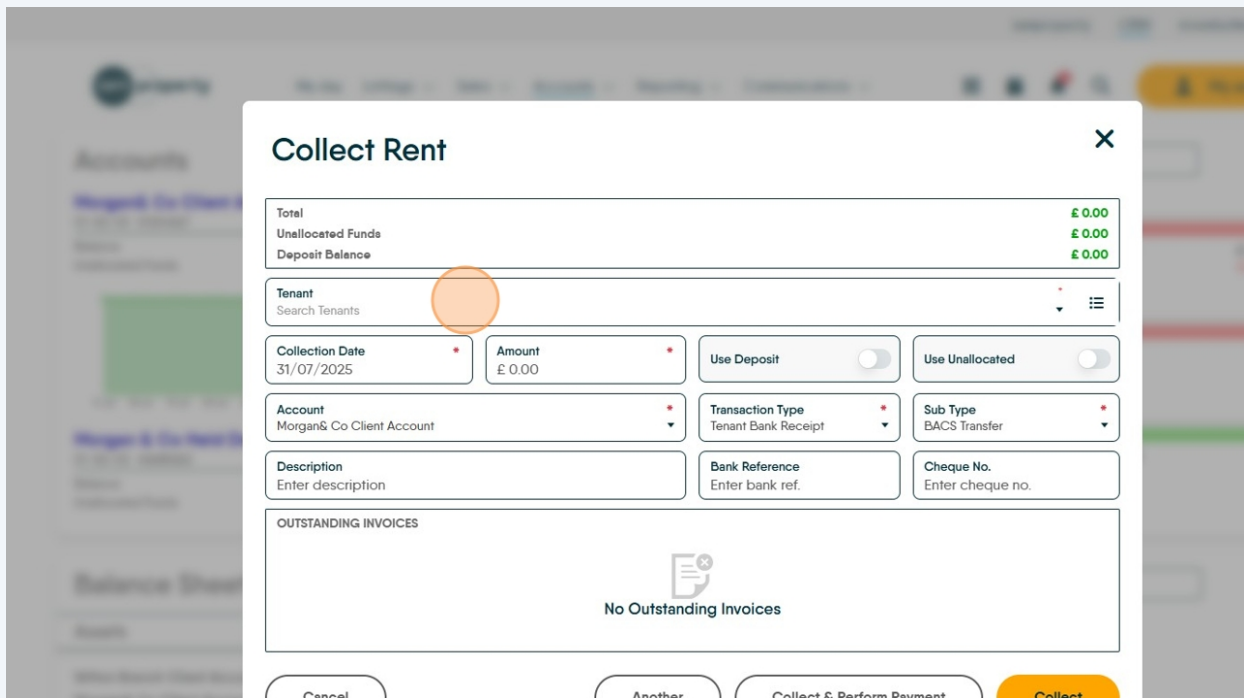
Description Enter description Bank Reference Enter bank ref. Cheque No. Enter cheque no.

OUTSTANDING INVOICES

No Outstanding Invoices

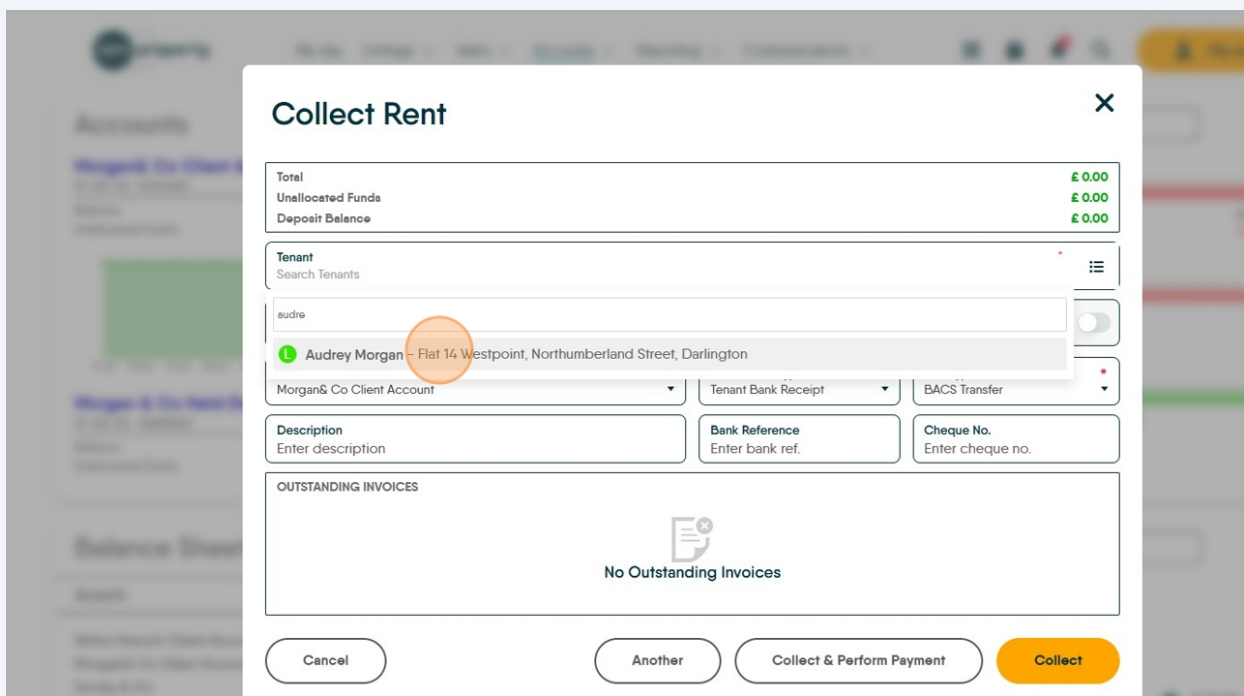
Cancel Another Collect & Perform Payment Collect

- 8 Click "Search Tenants" and type the tenant name.



The screenshot shows the 'Collect Rent' form. At the top, there is a summary section with three rows: 'Total' (£ 0.00), 'Unallocated Funds' (£ 0.00), and 'Deposit Balance' (£ 0.00). Below this is the 'Tenant' section, which includes a search bar labeled 'Search Tenants' and a dropdown menu. An orange circle highlights the 'Search Tenants' text. To the right of the search bar are two toggle switches: 'Use Deposit' and 'Use Unallocated'. Below these are three dropdown menus: 'Account' (Morgan& Co Client Account), 'Transaction Type' (Tenant Bank Receipt), and 'Sub Type' (BACS Transfer). There are also three text input fields: 'Description' (Enter description), 'Bank Reference' (Enter bank ref.), and 'Cheque No.' (Enter cheque no.). At the bottom, there is a section for 'OUTSTANDING INVOICES' which displays 'No Outstanding Invoices' with a document icon. The form has a close button (X) in the top right corner and several action buttons at the bottom: 'Cancel', 'Another', 'Collect & Perform Payment', and 'Collect'.

- 9 Click Tenant details.



The screenshot shows the 'Collect Rent' form with the 'Tenant' dropdown menu open. The search bar contains the text 'audre'. A dropdown list shows a single result: 'Audrey Morgan - Flat 14 Westpoint, Northumberland Street, Darlington'. An orange circle highlights this result. The rest of the form is identical to the previous screenshot, including the summary section, toggle switches, dropdown menus, text input fields, and the 'OUTSTANDING INVOICES' section. The form has a close button (X) in the top right corner and several action buttons at the bottom: 'Cancel', 'Another', 'Collect & Perform Payment', and 'Collect'.

10

On this screen you will not see any rents, as none are currently due. Click "UPCOMING" to see the future dated rent invoices.

Collect Rent

Total £ 0.00
Unallocated Funds £ 0.00
Deposit Balance £ 0.00

Tenant: Audrey Morgan

Collection Date: 31/07/2025 Amount: £ 0.00 Use Deposit: ☐ Use Unallocated: ☐

Account: Morgan & Co Client Account Transaction Type: Tenant Bank Receipt Sub Type: BACS Transfer

Description: Enter description Bank Reference: Enter bank ref. Cheque No.: Enter cheque no.

OUTSTANDING INVOICES

No Outstanding Invoices

Buttons: Cancel, Another, Collect & Perform Payment, Collect

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Click this checkbox to select and pay this invoice. If there are multiple rent invoices it is possible to select multiple invoices to pay in full or part pay.

Collect Rent

Total £ 750.00
Unallocated Funds £ 0.00
Deposit Balance £ 0.00

Tenant: Audrey Morgan

Collection Date: 31/07/2025 Amount: £ 0.00 Use Deposit: ☐ Use Unallocated: ☐

Account: Morgan & Co Client Account Transaction Type: Tenant Bank Receipt Sub Type: BACS Transfer

Description: Enter description Bank Reference: Enter bank ref. Cheque No.: Enter cheque no.

UPCOMING INVOICES

<input type="checkbox"/>	Date	Amount	Outstanding	Description
<input type="checkbox"/>	03/08/2025	£ 750.00	£ 750.00	Mrs Audrey Morgan (03/08/2025 - 02/09/2025)

Buttons: Cancel, Another, Pre-pay & Perform Payment, Pre-pay



Alert! Be aware of any legal changes that may restrict the pre payment of rents and work in accordance with those laws and legislations.

12

If there are multiple payments to pay, select those you are paying.

Total

£ 14,400.00

Unallocated Funds

£ 0.00

Deposit Balance

£ 0.00

Tenant

Lona Martin

Collection Date

31/07/2025

Amount

£ 0.00

Use Deposit

Use Unallocated

Account

Morgan& Co Client Account

Transaction Type

Tenant Bank Receipt

Sub Type

BACS Transfer

Description

Enter description

Bank Reference

Enter bank ref.

Cheque No.

Enter cheque no.

UPCOMING INVOICES

OUTSTANDING

<input type="checkbox"/>	Date	Amount	Outstanding	Description
<input type="checkbox"/>	03/08/2025	£ 1,200.00	£ 1,200.00	Mrs Lona Martin (03/08/2025 - 02/09/2025)
<input type="checkbox"/>	03/09/2025	£ 1,200.00	£ 1,200.00	Mrs Lona Martin (03/09/2025 - 02/10/2025)
<input type="checkbox"/>	03/10/2025	£ 1,200.00	£ 1,200.00	Mrs Lona Martin (03/10/2025 - 02/11/2025)
<input type="checkbox"/>	03/11/2025	£ 1,200.00	£ 1,200.00	Mrs Lona Martin (03/11/2025 - 02/12/2025)
<input type="checkbox"/>	03/12/2025	£ 1,200.00	£ 1,200.00	Mrs Lona Martin (03/12/2025 - 02/01/2026)

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Cancel

Another

Pre-pay & Perform Payment

Pre-pay

13 Click "Pre-pay"

Total £ 750.00
Unallocated Funds £ 0.00
Deposit Balance £ 0.00

Tenant
• Audrey Morgan

Collection Date 31/07/2025 Amount £ 750.00 Use Deposit Use Unallocated

Account Morgan & Co Client Account Transaction Type Tenant Bank Receipt Sub Type BACS Transfer

Description Mrs Audrey Morgan (03/08/2025 - 02/09/2025) Bank Reference Enter bank ref. Cheque No. Enter cheque no.

UPCOMING INVOICES

✓	Date	Amount	Outstanding	Description
✓	03/08/2025	£ 750.00	£ 750.00	Mrs Audrey Morgan (03/08/2025 - 02/09/2025)

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Cancel Another Pre-pay & Perform Payment Pre-pay

14 Click "Yes or No" yes will create an invoice that can be printed or emailed to your tenant.

Would you like to produce a tenant receipt?

No Yes

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These invoices will be paid and the money made available to be paid to the Landlord at that point. This is the same if a tenant pays 1 month in advance by a couple of days or many months in advance.