

Creating and Managing Regular Expenses in CRM

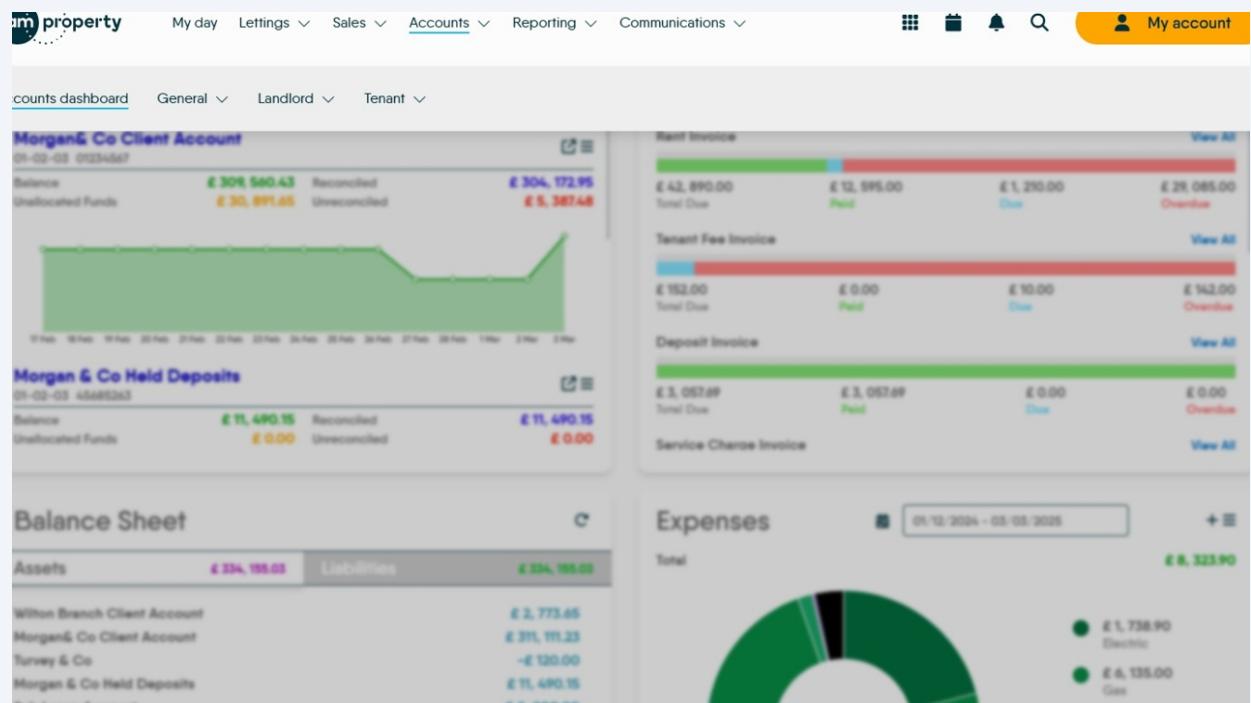


This guide offers a step-by-step approach to efficiently create and manage regular expenses within your CRM system.

By following these instructions, you can streamline your property management processes, ensuring accurate billing and record-keeping for tenants. The clear navigation and detailed actions help eliminate confusion, making it easier to handle expenses and invoicing.

1

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



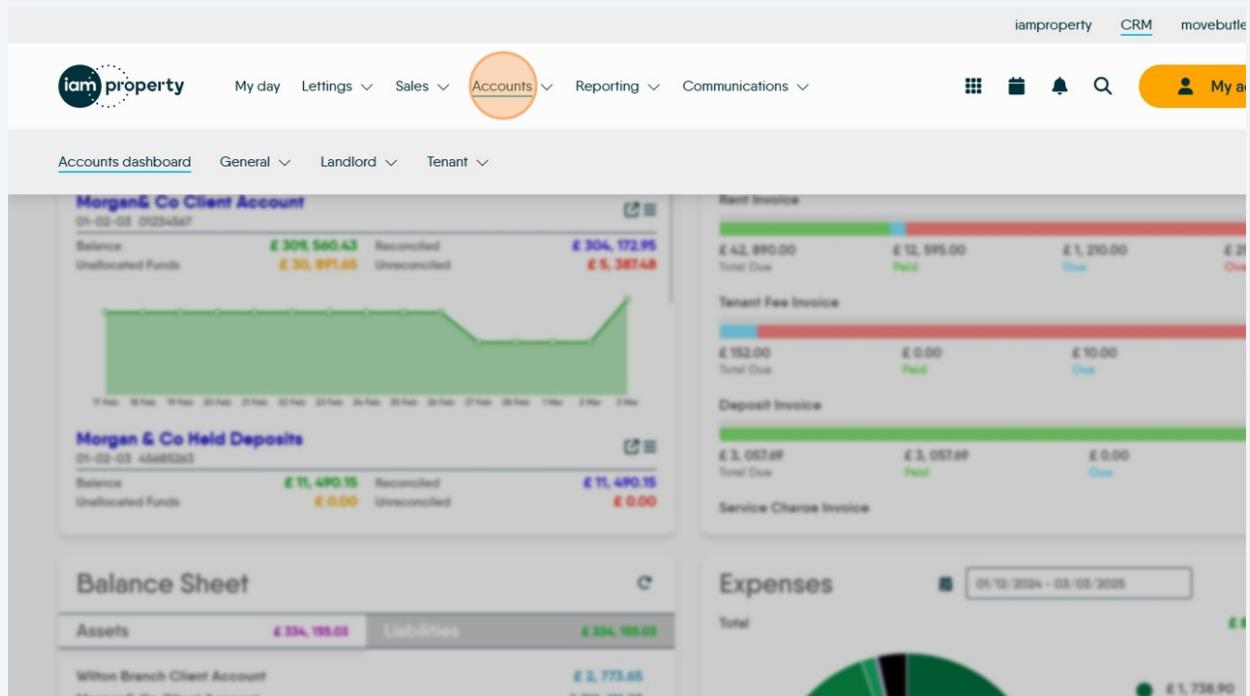
Regular Expense



This will create a regular charge to a specific Property and paid to a Contractor via the Expenses process.

2

Click "Accounts"
 Click "General"
 Click "Regular Expenses"



Accounts dashboard General ▾ Landlord ▾ Tenant ▾

Morgan & Co Client Account
 01-02-05 01234567
 Balance £ 309,560.43 Reconciled £ 304,172.95
 Unallocated Funds £ 30,891.45 Unreconciled £ 5,387.48

Morgan & Co Held Deposits
 01-02-05 4567890123
 Balance £ 11,490.15 Reconciled £ 11,490.15
 Unallocated Funds £ 0.00 Unreconciled £ 0.00

Rent Invoice
 £ 42,890.00 £ 12,895.00 £ 1,210.00 £ 2,210.00
 Total Due Paid Due Due

Tenant Fee Invoice
 £ 152.00 £ 0.00 £ 10.00 £ 0.00
 Total Due Paid Due Due

Deposit Invoice
 £ 3,057.69 £ 3,057.69 £ 0.00 £ 0.00
 Total Due Paid Due Due

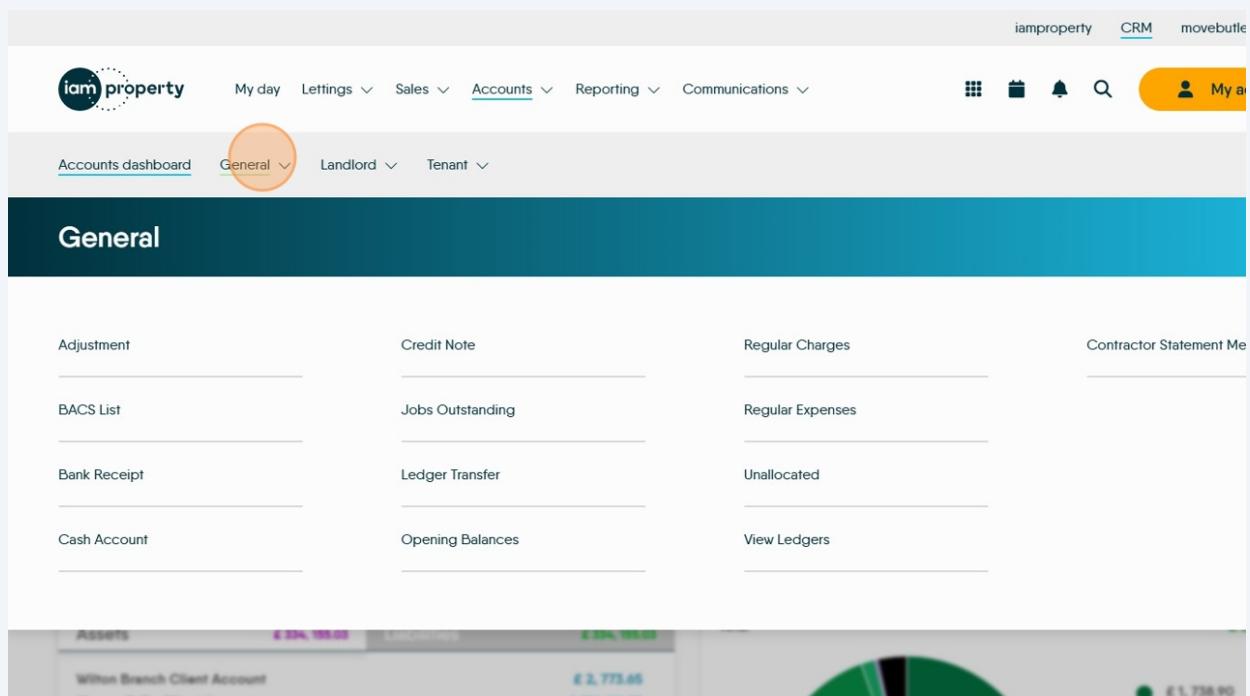
Service Charge Invoice

Balance Sheet

Assets £ 334,198.03 Liabilities £ 334,198.03

Wilton Branch Client Account £ 2,773.65

Expenses
 01/12/2024 - 03/03/2025
 Total £ 1,738.90

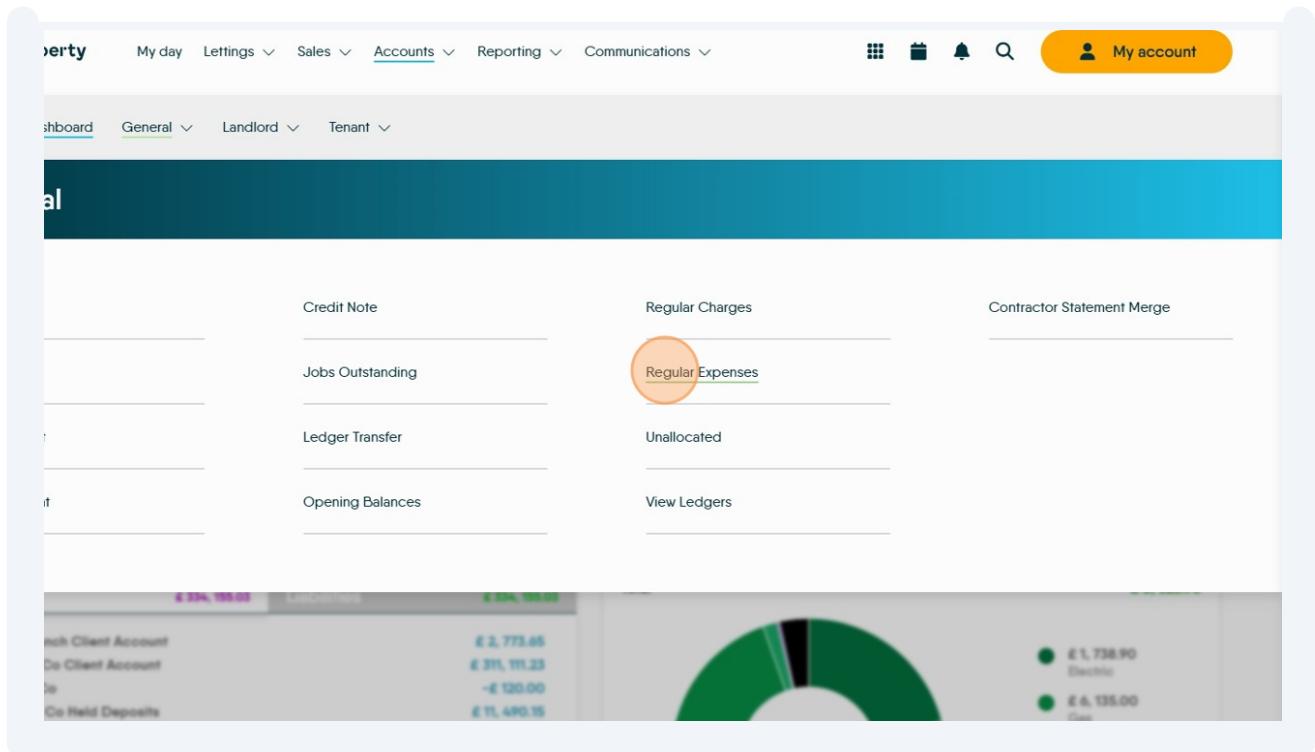


Accounts dashboard General ▾ Landlord ▾ Tenant ▾

General

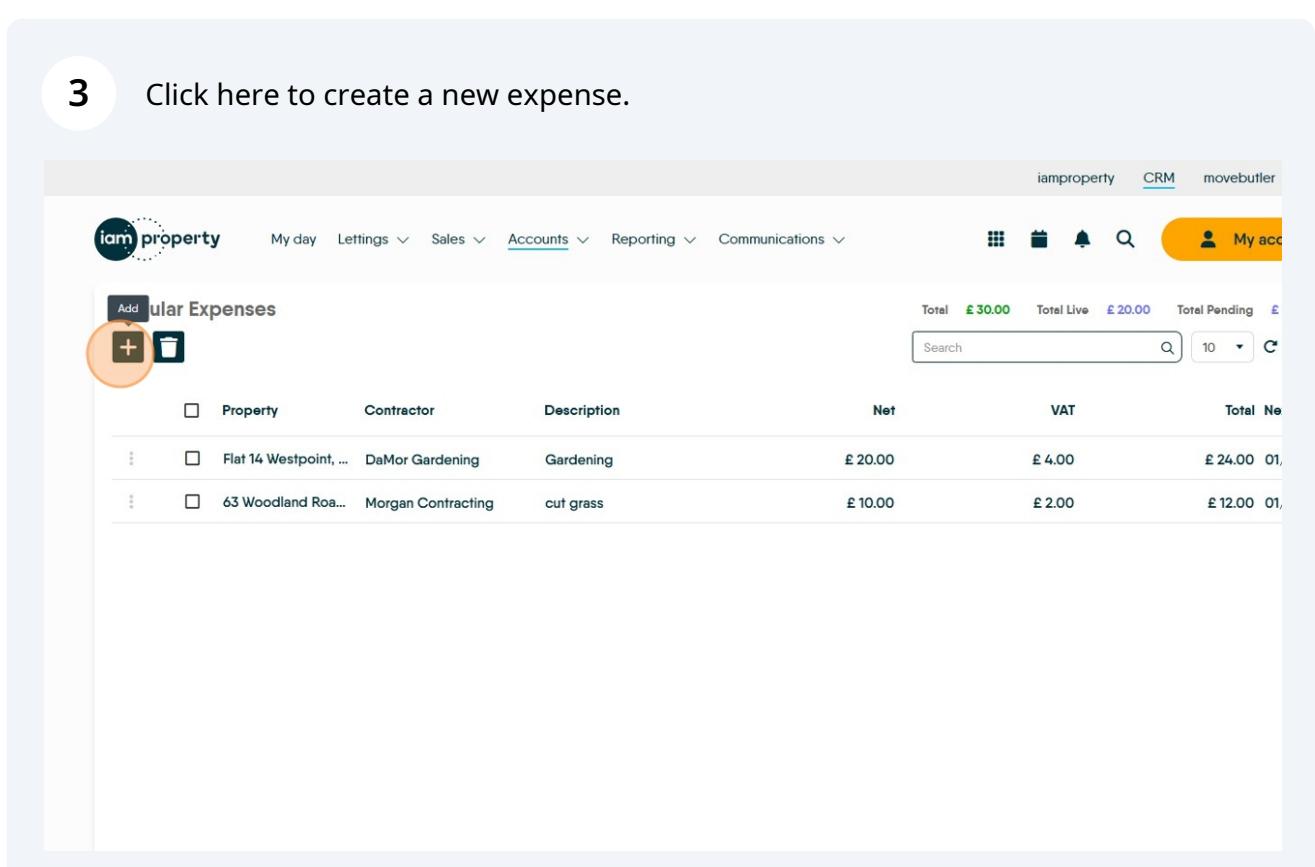
Adjustment	Credit Note	Regular Charges	Contractor Statement Me
BACS List	Jobs Outstanding	Regular Expenses	
Bank Receipt	Ledger Transfer	Unallocated	
Cash Account	Opening Balances	View Ledgers	

Assets £ 334,198.03
 Wilton Branch Client Account £ 2,773.65
 Total £ 1,738.90



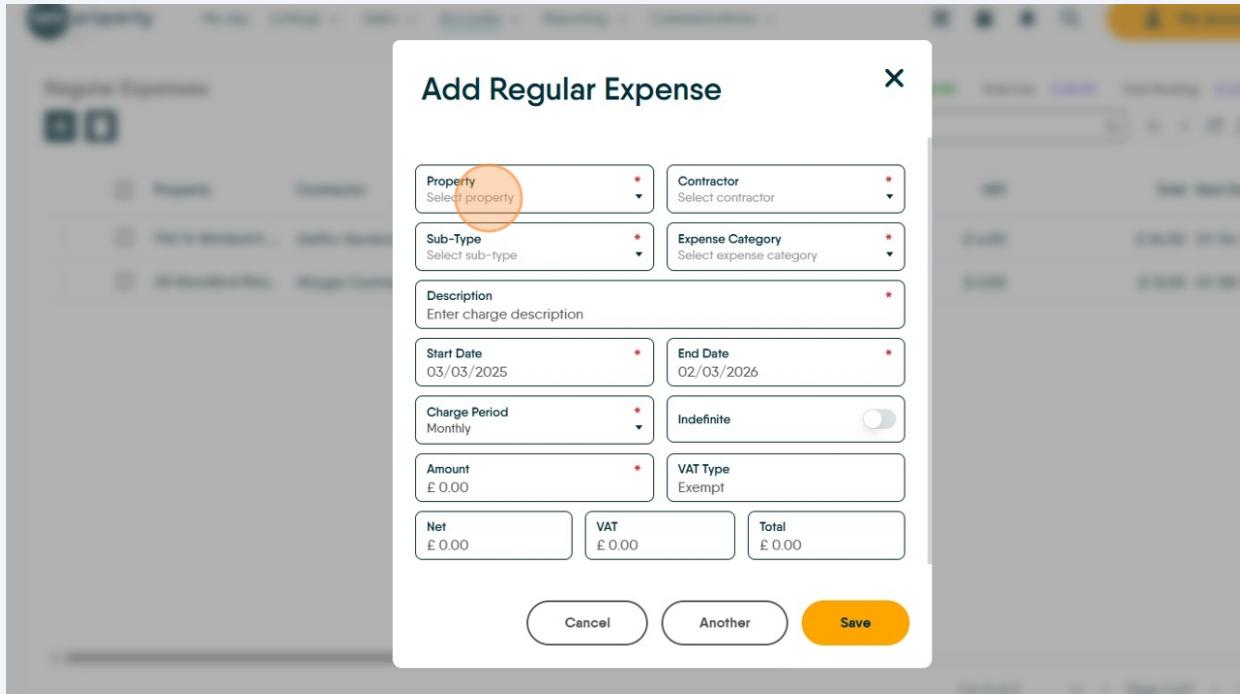
The screenshot shows the 'Accounts' section of the iamproperty software. At the top, there are navigation links: 'My day', 'Lettings', 'Sales', 'Accounts' (which is underlined to indicate it's the active section), 'Reporting', and 'Communications'. On the right, there are icons for 'My account' and a search bar. Below the navigation, there are tabs for 'Dashboard', 'General', 'Landlord', and 'Tenant'. The main content area has a dark blue header with the word 'General'. Below this, there are several options: 'Credit Note', 'Regular Charges', 'Contractor Statement Merge', 'Jobs Outstanding' (which is highlighted with a red circle), 'Unallocated', 'Ledger Transfer', 'Opening Balances', and 'View Ledgers'. At the bottom of this section, there is a small chart showing financial data: '£ 394,195.00', '£ 394,195.00', 'Each Client Account: £ 2,773.65', 'Co Client Account: £ 311,111.23', 'To: -£ 120.00', 'Co Held Deposits: £ 11,490.15', '£ 1,738.90 Electric', and '£ 6,135.00 Gas'.

3 Click here to create a new expense.

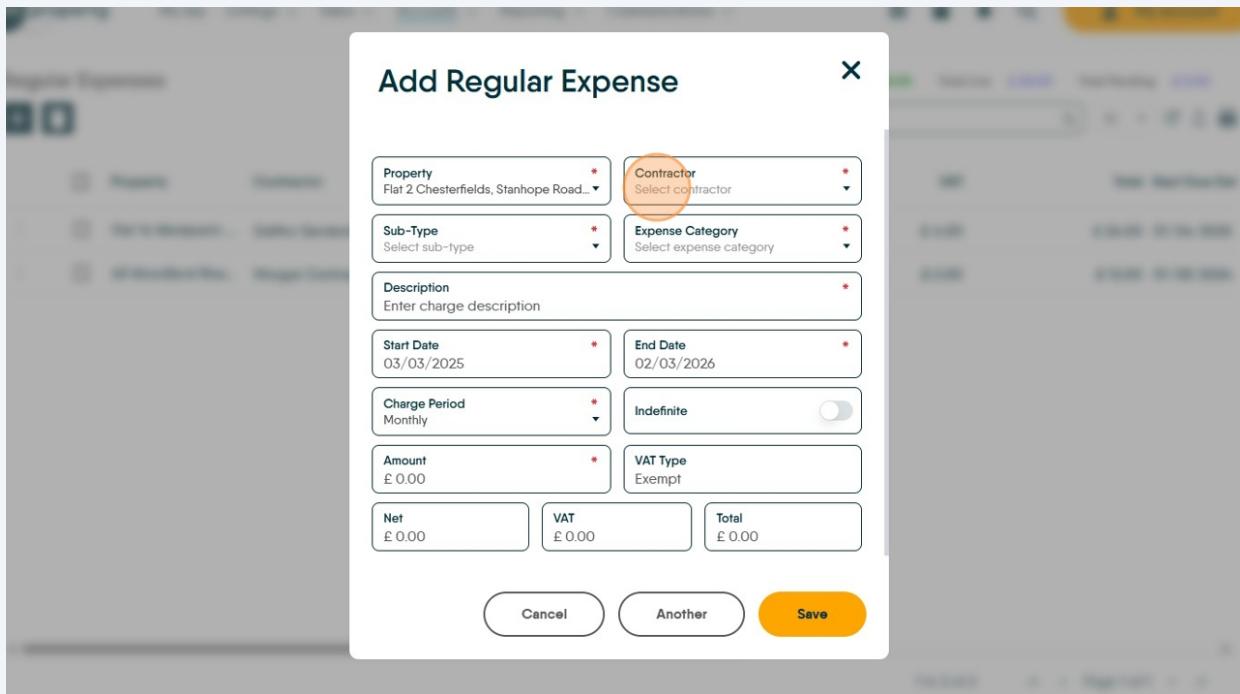


The screenshot shows the 'Regular Expenses' list page. At the top, there is a header with 'Add Regular Expenses' and a red circle around the 'Add' button. To the right of the header, there are filters for 'Total: £ 30.00', 'Total Live: £ 20.00', 'Total Pending: £ 0.00', and a 'Search' bar. Below the header, there is a table with columns: 'Property' (checkbox), 'Contractor', 'Description', 'Net', 'VAT', and 'Total'. The table contains two rows of data: one for 'Flat 14 Westpoint, ...' with contractor 'DaMor Gardening' and description 'Gardening', and another for '63 Woodland Roa...' with contractor 'Morgan Contracting' and description 'cut grass'.

4 Click "**Select property**" and search for the property you are creating the expense for.

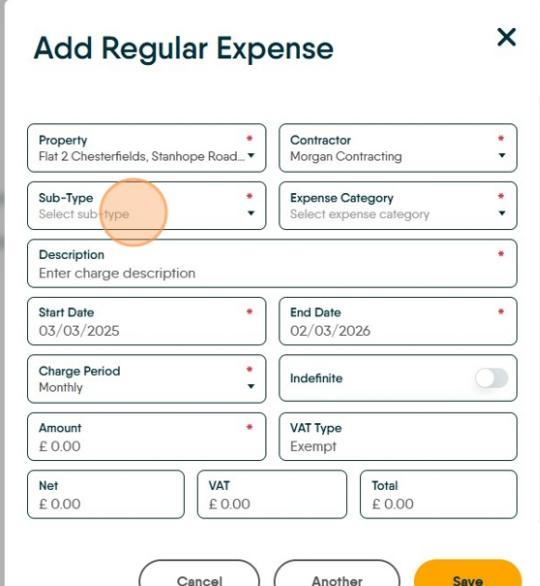


5 Click "**Select contractor**" search for and select the Contractor doing the work.



6

Click "**Select sub-type**" i.e. the type of work being done.
For example click "General Maintenance"



Add Regular Expense

Property: Flat 2 Chesterfields, Stanhope Road... Contractor: Morgan Contracting

Sub-Type: Select sub-type

Description: Enter charge description

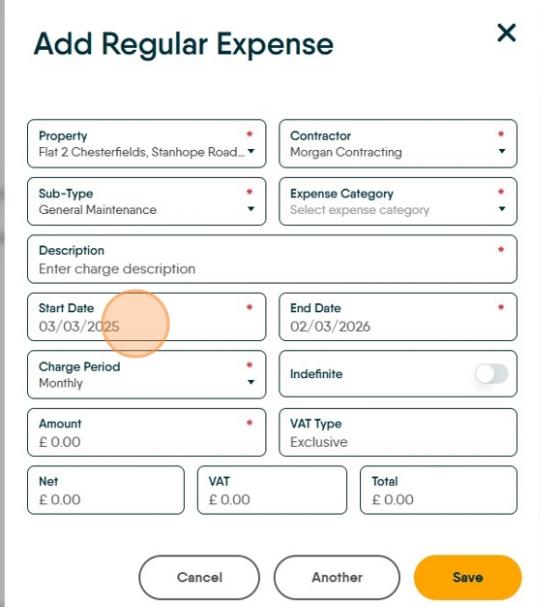
Start Date: 03/03/2025 End Date: 02/03/2026

Charge Period: Monthly Indefinite

Amount: £ 0.00 VAT Type: Exempt

Net: £ 0.00 VAT: £ 0.00 Total: £ 0.00

Cancel Another Save



Add Regular Expense

Property: Flat 2 Chesterfields, Stanhope Road... Contractor: Morgan Contracting

Sub-Type: General Maintenance

Description: Enter charge description

Start Date: 03/03/2025 End Date: 02/03/2026

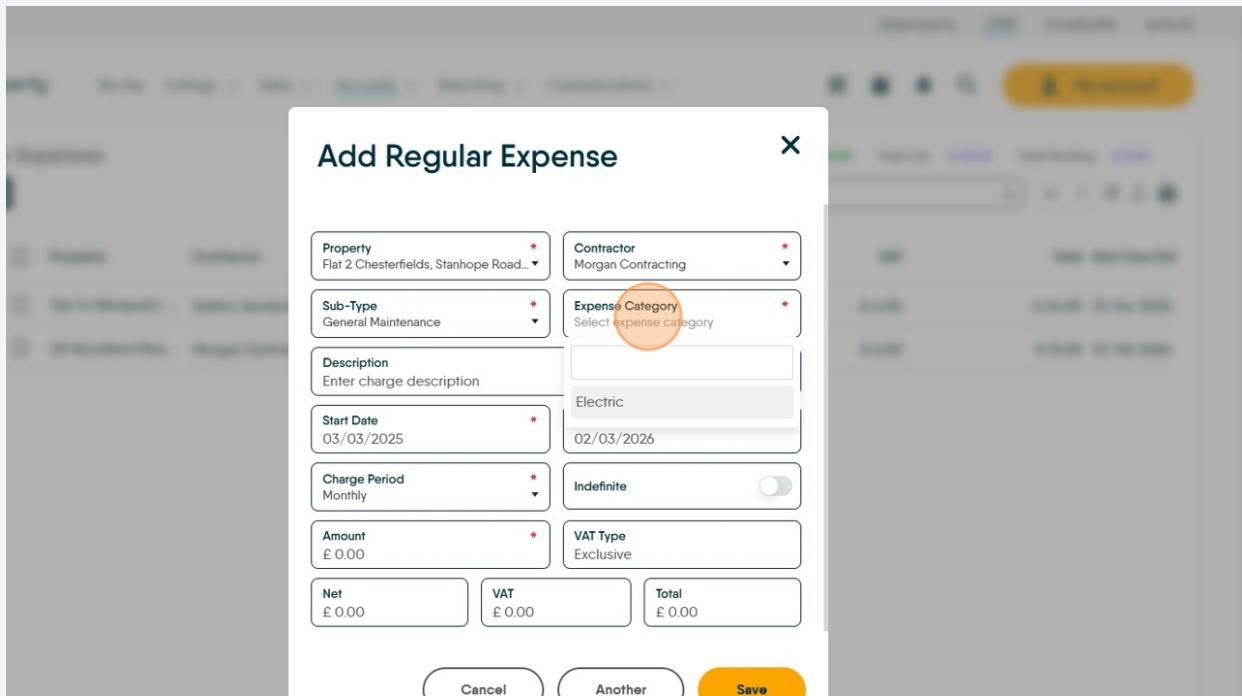
Charge Period: Monthly Indefinite

Amount: £ 0.00 VAT Type: Exclusive

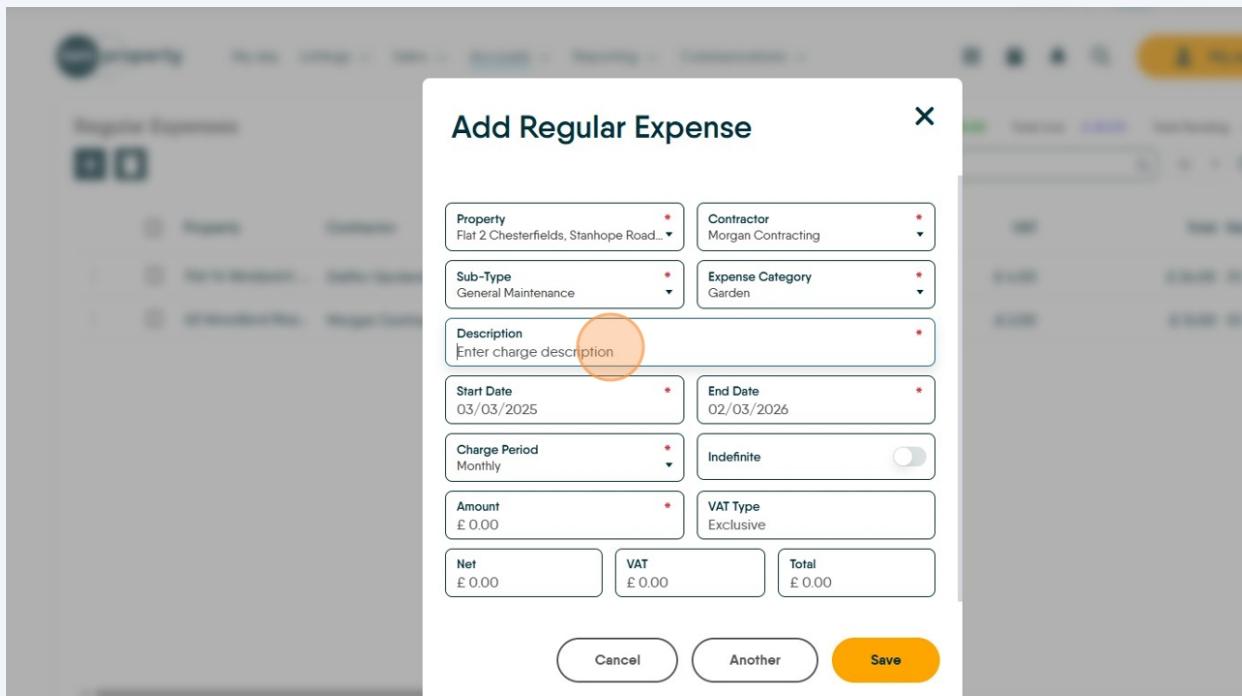
Net: £ 0.00 VAT: £ 0.00 Total: £ 0.00

Cancel Another Save

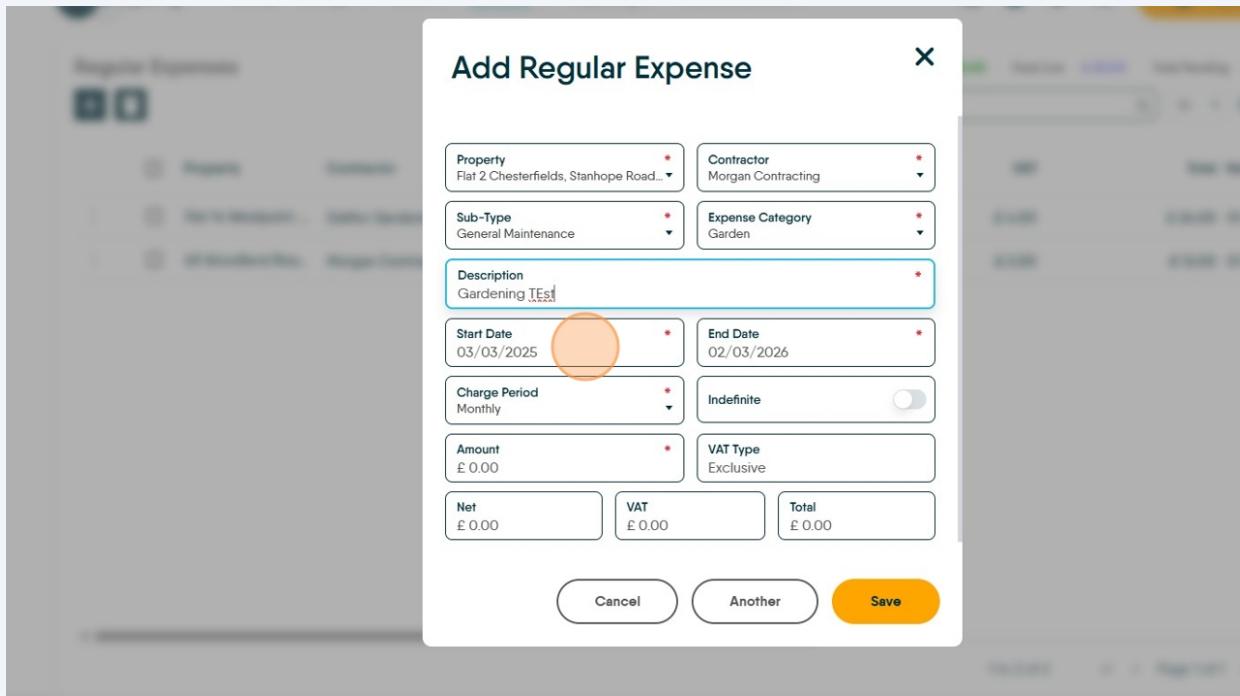
7 Click "Select expense category" e.g. Electric, Garden etc



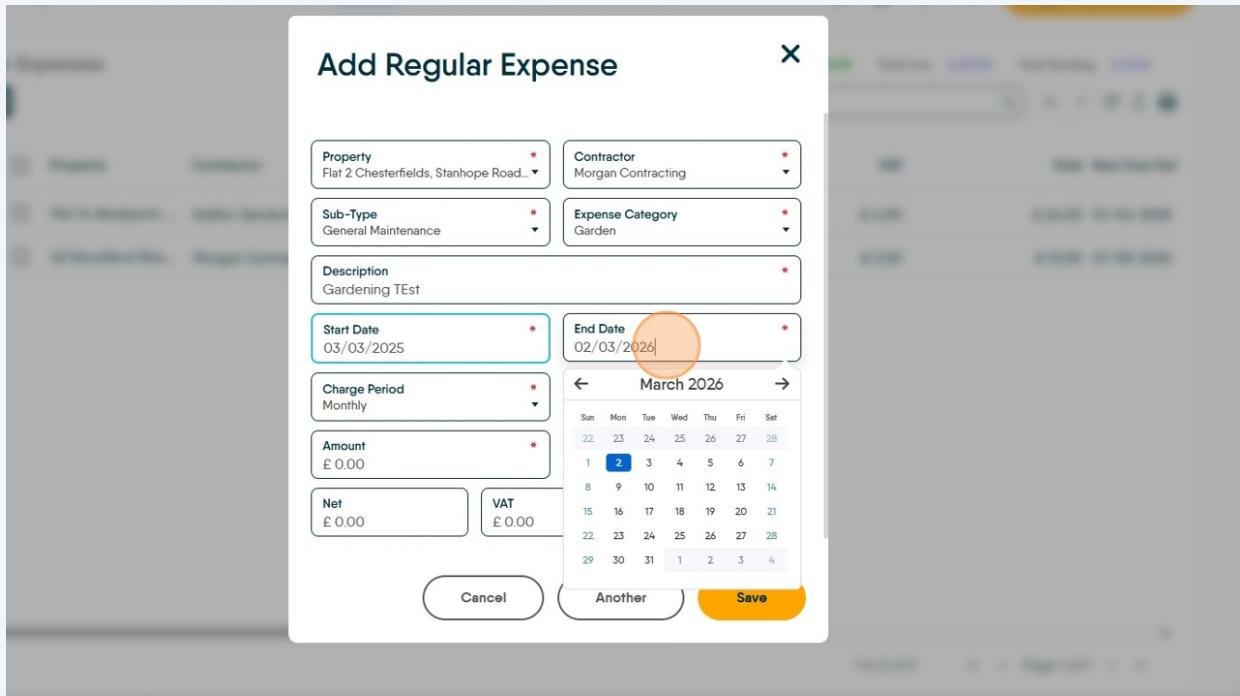
8 Click the "Description" field and add a description.



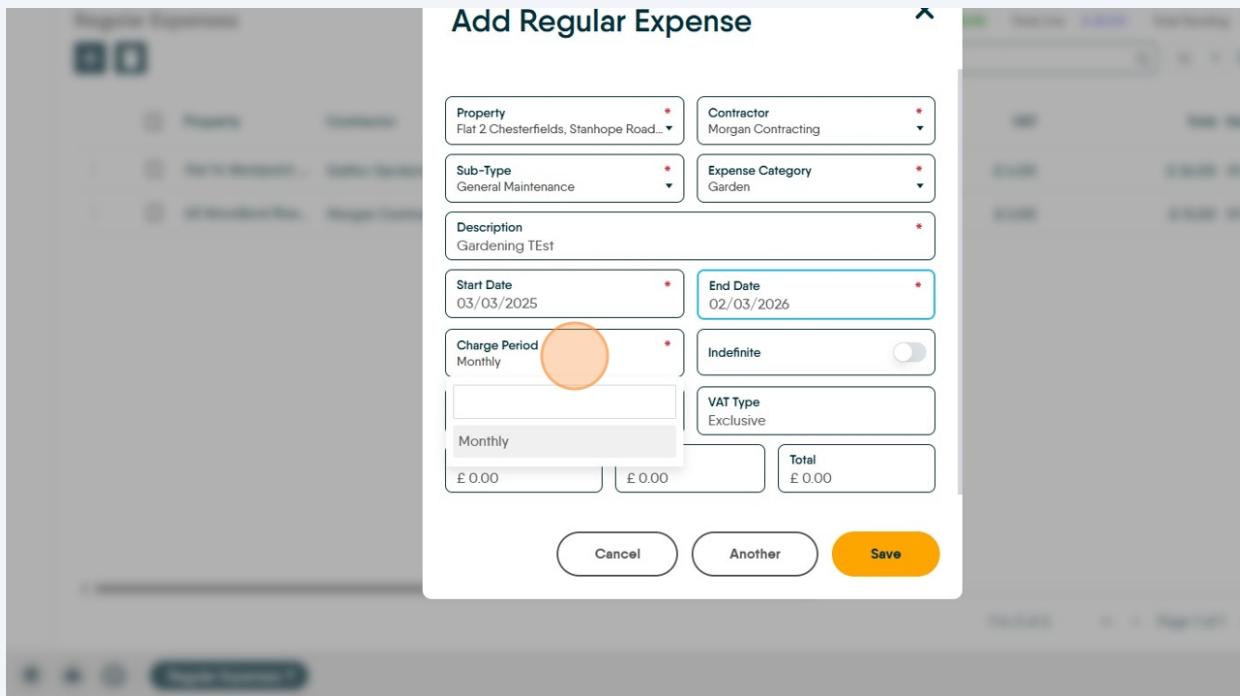
9 Click the "**Start Date**" field, this is the date of the first charge.



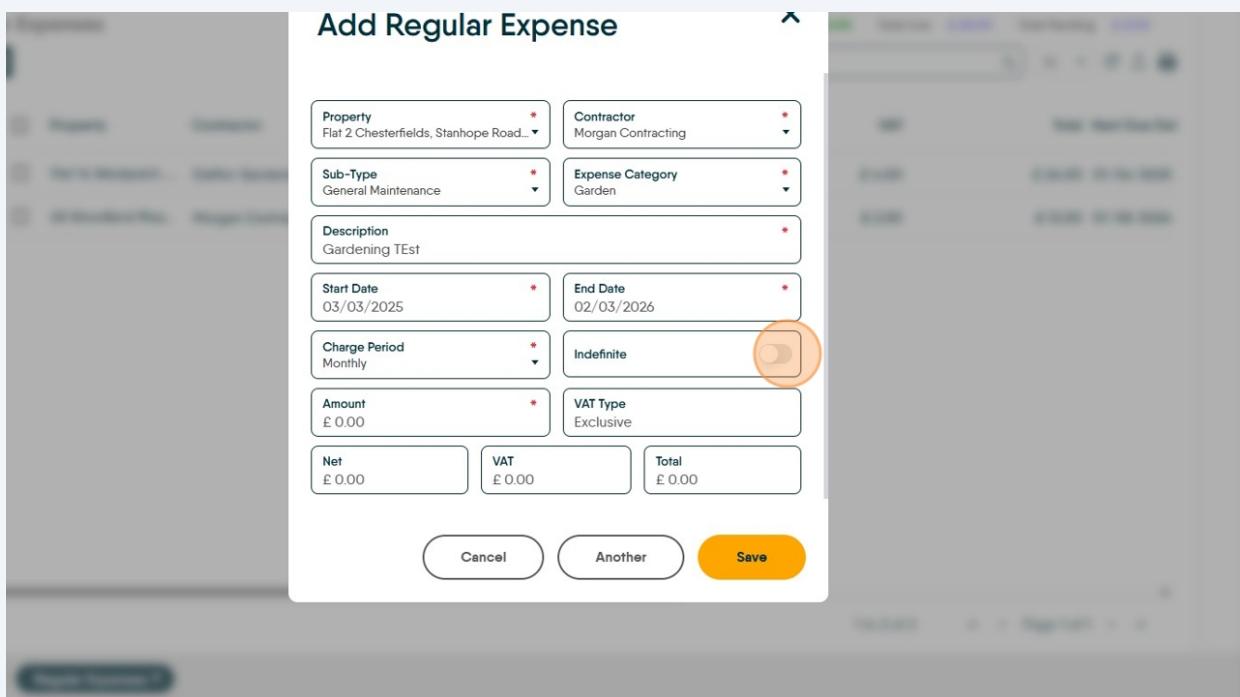
10 Click the "**End Date**" field this is the date of the last charge, however there is an indefinite option.



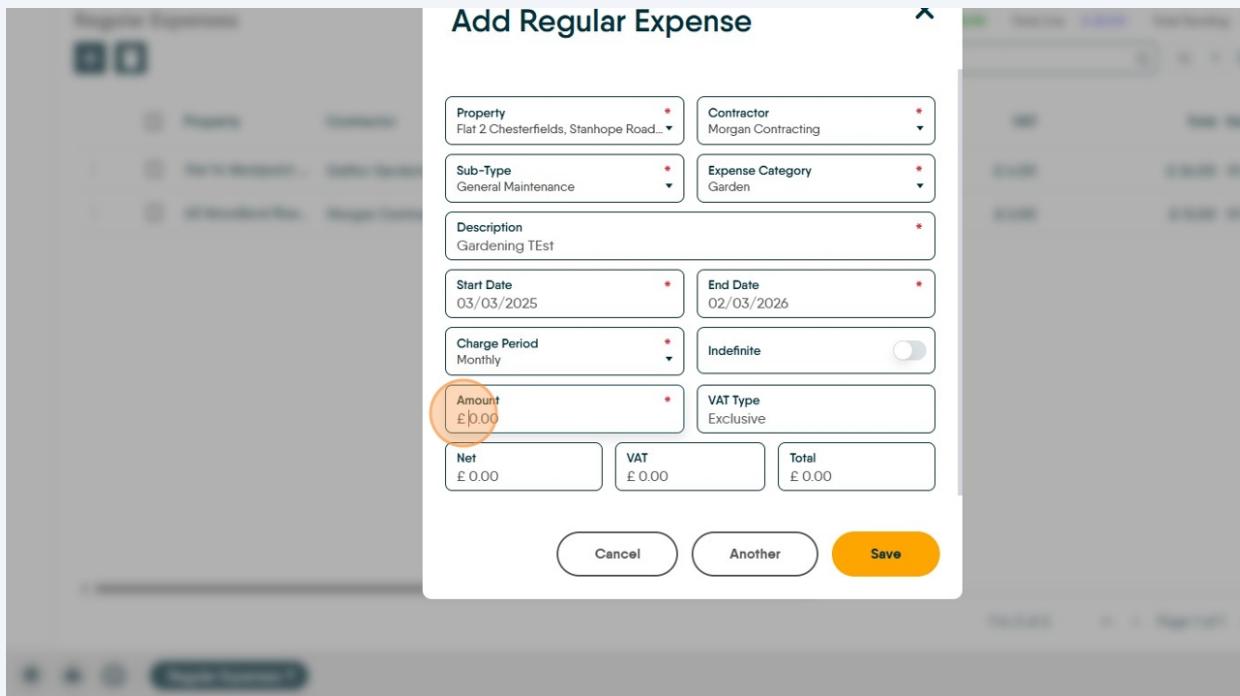
11 Click to set the charge period, e.g. monthly, quarterly etc.



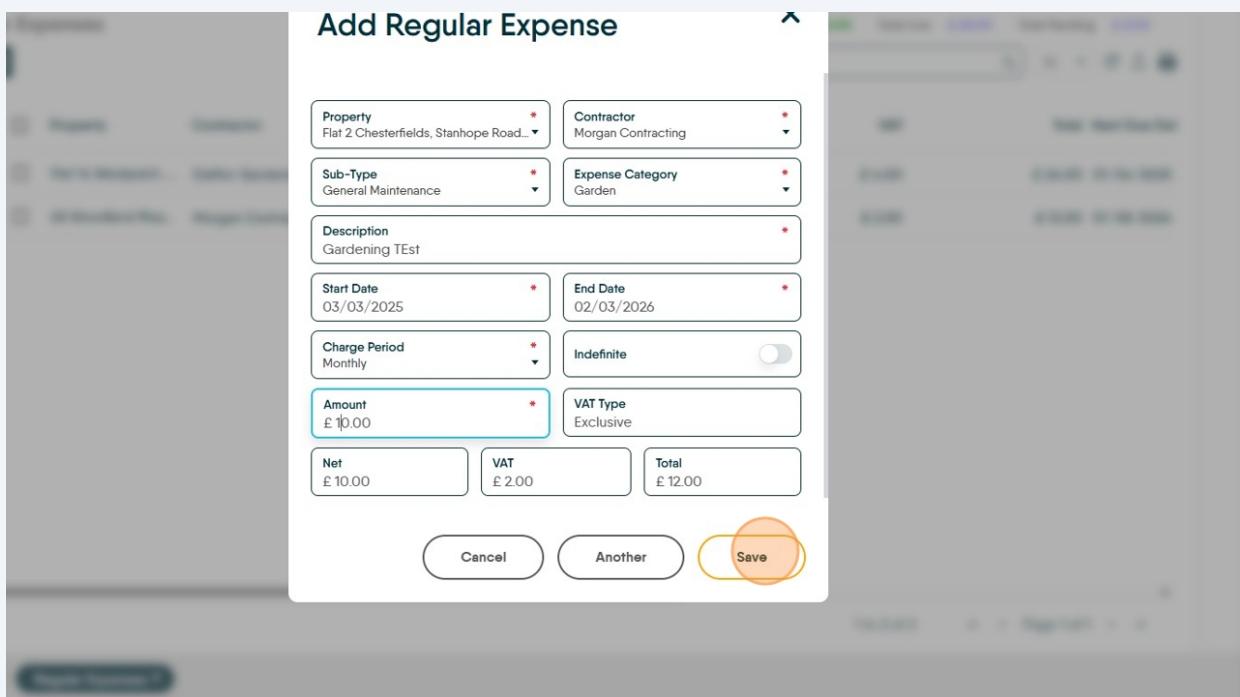
12 Click here to create an expense with an indefinite end date.



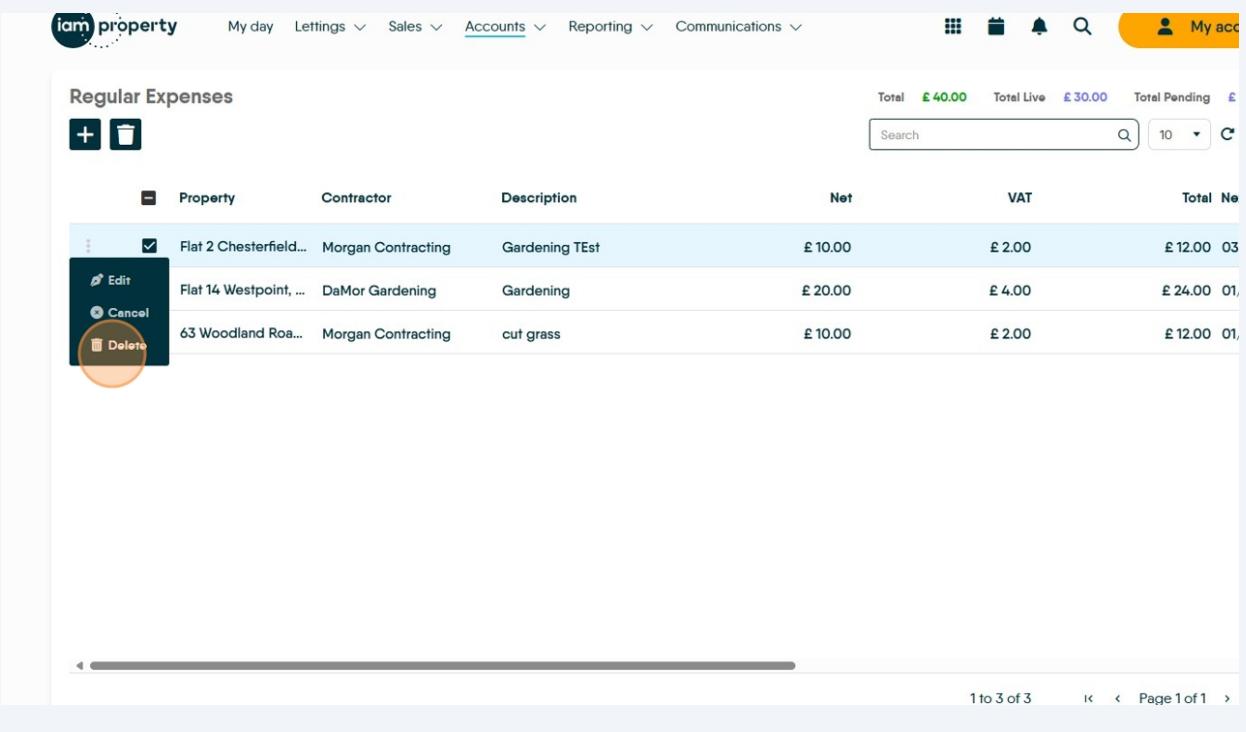
13 Click the "Amount" field.



14 Click "Save" to create the expense



15 The 3-dot menu gives the option to Edit, Cancel or Delete the expense



Property	Contractor	Description	Net	VAT	Total
Flat 2 Chesterfield...	Morgan Contracting	Gardening TEst	£10.00	£ 2.00	£ 12.00 03
Flat 14 Westpoint, ...	DaMor Gardening	Gardening	£20.00	£ 4.00	£ 24.00 01,
63 Woodland Roa...	Morgan Contracting	cut grass	£10.00	£ 2.00	£ 12.00 01,

16 The expense will now be charged to the property at the timescale that has been set (monthly, Quarterly etc)