

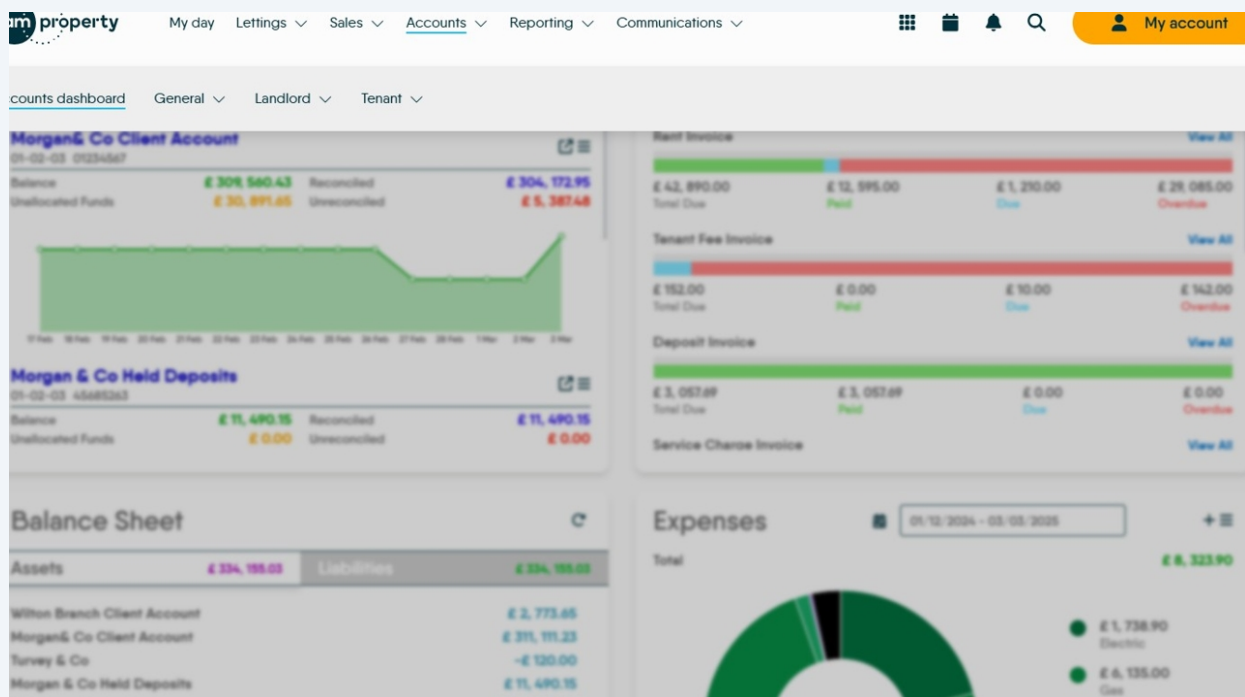
Creating and Managing Regular Expenses in CRM



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"**

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iamproperty My day Lettings Sales Accounts Reporting Communications

Accounts dashboard General Landlord Tenant

Morgan & Co Client Account
01-02-03 01234567
Balance £ 304,540.43 Reconciled £ 304,172.95
Unallocated Funds £ 30,891.65 Unreconciled £ 5,367.48

Morgan & Co Held Deposits
01-02-03 45678901
Balance £ 11,490.15 Reconciled £ 11,490.15
Unallocated Funds £ 0.00 Unreconciled £ 0.00

Balance Sheet
Assets £ 334,188.08 Liabilities £ 334,188.08

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

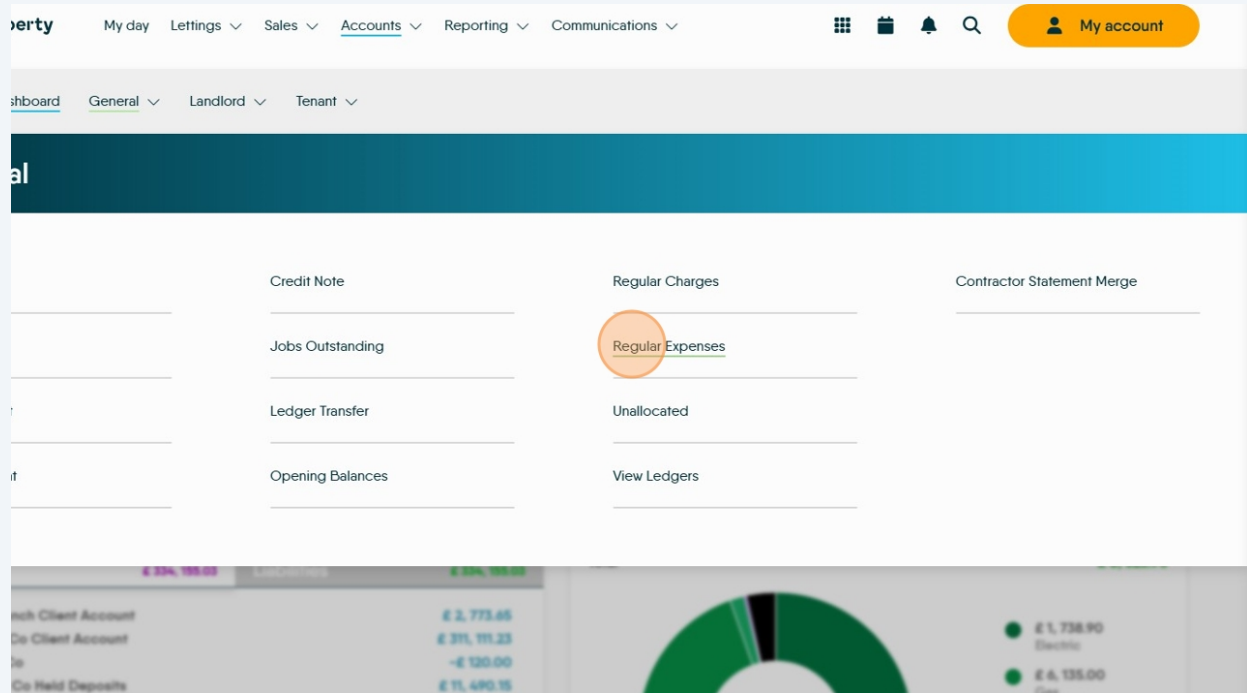
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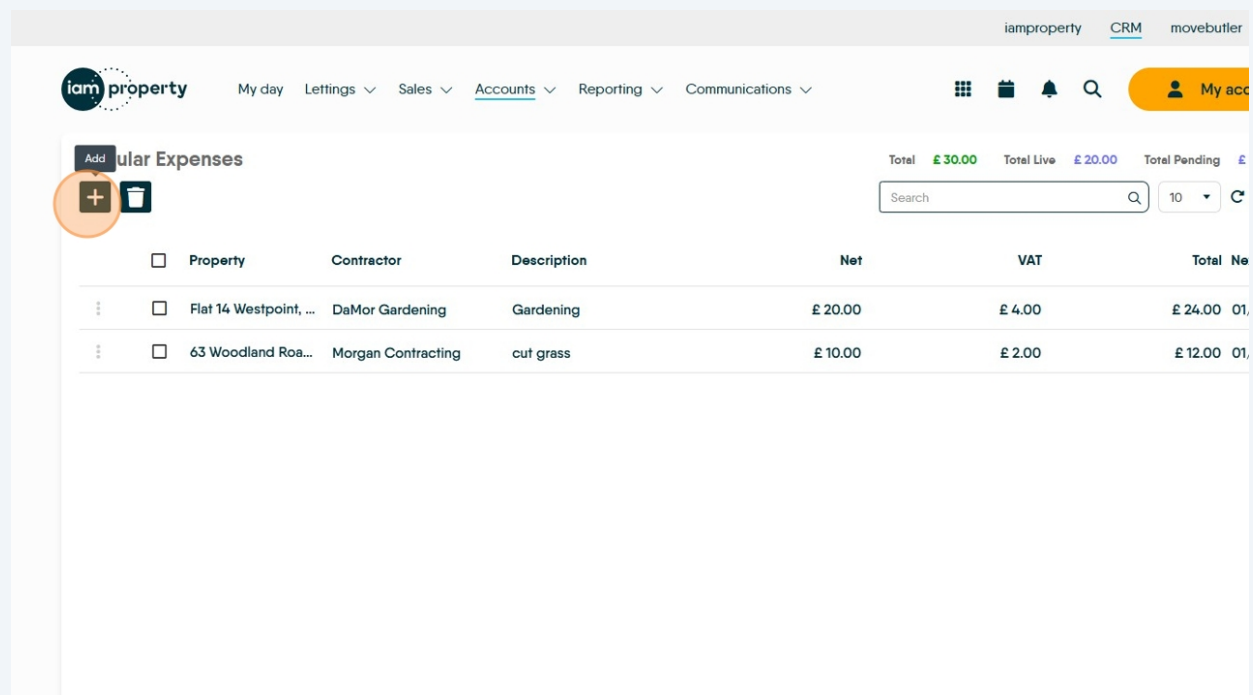
Accounts dashboard General Landlord Tenant

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	



3 Click here to create a new expense.



4

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

The screenshot shows the 'Add Regular Expense' form with the following fields and values:

Property	Contractor
Select property	Select contractor

Sub-Type	Expense Category
Select sub-type	Select expense category

Description
Enter charge description

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

Charge Period	Indefinite
Monthly	<input type="checkbox"/>

Amount	VAT Type
£ 0.00	Exempt

Net	VAT	Total
£ 0.00	£ 0.00	£ 0.00

Buttons: Cancel, Another, Save

5

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

The screenshot shows the 'Add Regular Expense' form with the following fields and values:

Property	Contractor
Flat 2 Chesterfields, Stanhope Road...	Select contractor

Sub-Type	Expense Category
Select sub-type	Select expense category

Description
Enter charge description

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

Charge Period	Indefinite
Monthly	<input type="checkbox"/>

Amount	VAT Type
£ 0.00	Exempt

Net	VAT	Total
£ 0.00	£ 0.00	£ 0.00

Buttons: Cancel, Another, Save

6

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

The screenshot shows the 'Add Regular Expense' form with the following fields and values:

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

Sub-Type	Expense Category
Select sub-type	Select expense category

Description: Enter charge description

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

Charge Period	Indefinite
Monthly	<input type="checkbox"/>

Amount	VAT Type
£ 0.00	Exempt

Net	VAT	Total
£ 0.00	£ 0.00	£ 0.00

Buttons: Cancel, Another, Save

The screenshot shows the 'Add Regular Expense' form with the following fields and values:

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

Sub-Type	Expense Category
General Maintenance	Select expense category

Description: Enter charge description

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

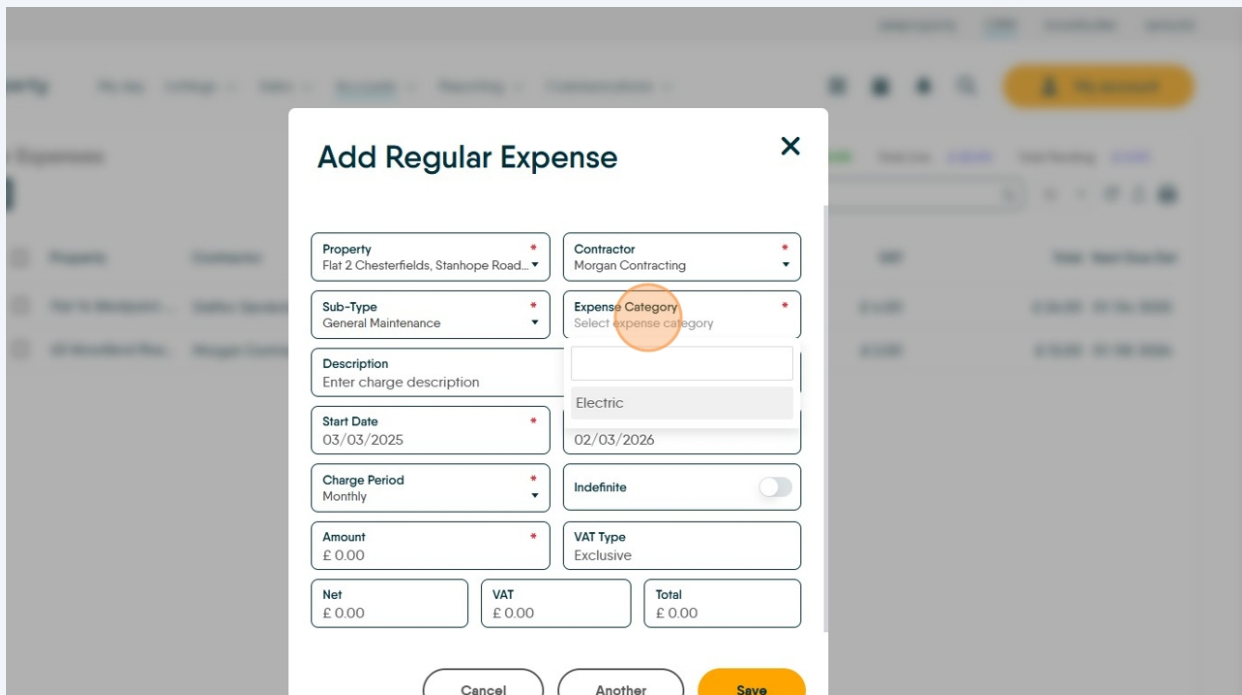
Charge Period	Indefinite
Monthly	<input type="checkbox"/>

Amount	VAT Type
£ 0.00	Exclusive

Net	VAT	Total
£ 0.00	£ 0.00	£ 0.00

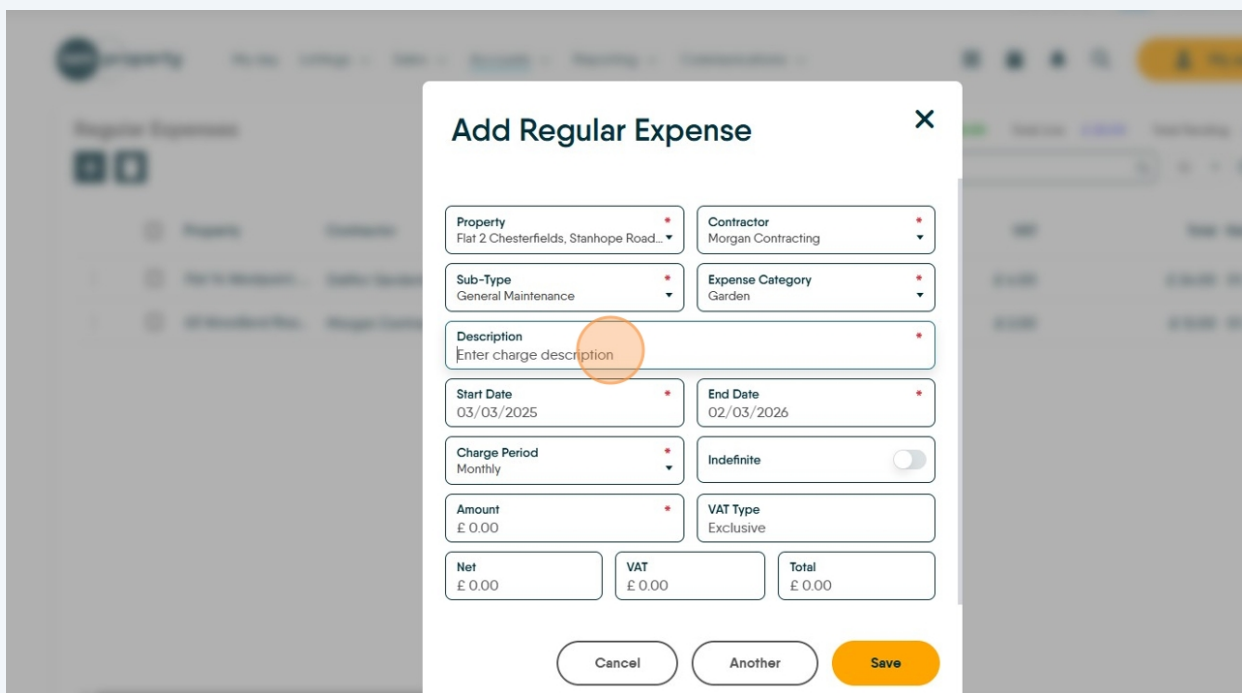
Buttons: Cancel, Another, Save

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



The screenshot shows a modal form titled "Add Regular Expense" with a close button (X) in the top right corner. The form contains several fields: "Property" (Flat 2 Chesterfields, Stanhope Road...), "Contractor" (Morgan Contracting), "Sub-Type" (General Maintenance), "Expense Category" (Select expense category), "Description" (Enter charge description), "Start Date" (03/03/2025), "End Date" (02/03/2026), "Charge Period" (Monthly), "Indefinite" (toggle), "Amount" (£ 0.00), "VAT Type" (Exclusive), "Net" (£ 0.00), "VAT" (£ 0.00), and "Total" (£ 0.00). At the bottom are "Cancel", "Another", and "Save" buttons. An orange circle highlights the "Expense Category" dropdown menu, which has a list of options including "Electric".

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



The screenshot shows the same "Add Regular Expense" modal form. In this step, the "Expense Category" dropdown is now set to "Garden". An orange circle highlights the "Description" text input field, which contains the placeholder text "Enter charge description". The other fields and buttons remain the same as in the previous screenshot.

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

The screenshot shows the 'Add Regular Expense' form. The 'Start Date' field, containing '03/03/2025', is highlighted with an orange circle. Other fields include Property (Flat 2 Chesterfields, Stanhope Road...), Contractor (Morgan Contracting), Sub-Type (General Maintenance), Expense Category (Garden), Description (Gardening TEst), End Date (02/03/2026), Charge Period (Monthly), Indefinite toggle, Amount (£ 0.00), VAT Type (Exclusive), and summary fields for Net, VAT, and Total (£ 0.00). Buttons for Cancel, Another, and Save are at the bottom.

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

The screenshot shows the 'Add Regular Expense' form with the 'End Date' field, containing '02/03/2026', highlighted by an orange circle. A calendar for March 2026 is displayed over the form, showing the date selection interface. The calendar grid shows days from Sunday to Saturday, with the 2nd of March highlighted. The form fields and buttons are the same as in the previous screenshot.

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

The screenshot shows the 'Add Regular Expense' form. The 'Charge Period' dropdown menu is open, showing 'Monthly' as the selected option. An orange circle highlights the dropdown arrow. The form fields are as follows:

Property Flat 2 Chesterfields, Stanhope Road...	Contractor Morgan Contracting
Sub-Type General Maintenance	Expense Category Garden
Description Gardening TEst	
Start Date 03/03/2025	End Date 02/03/2026
Charge Period Monthly	Indefinite <input type="checkbox"/>
VAT Type Exclusive	
£ 0.00	Total £ 0.00

Buttons: Cancel, Another, Save

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

The screenshot shows the 'Add Regular Expense' form. The 'Indefinite' checkbox is highlighted with an orange circle. The form fields are as follows:

Property Flat 2 Chesterfields, Stanhope Road...	Contractor Morgan Contracting
Sub-Type General Maintenance	Expense Category Garden
Description Gardening TEst	
Start Date 03/03/2025	End Date 02/03/2026
Charge Period Monthly	Indefinite <input checked="" type="checkbox"/>
Amount £ 0.00	VAT Type Exclusive
Net £ 0.00	Total £ 0.00

Buttons: Cancel, Another, Save

13 Click the **"Amount"** field.

The screenshot shows a mobile application interface with a modal titled "Add Regular Expense". The form contains several input fields: "Property" (Flat 2 Chesterfields, Stanhope Road...), "Contractor" (Morgan Contracting), "Sub-Type" (General Maintenance), "Expense Category" (Garden), "Description" (Gardening TEst), "Start Date" (03/03/2025), "End Date" (02/03/2026), "Charge Period" (Monthly), "Indefinite" (toggle), "Amount" (£0.00), and "VAT Type" (Exclusive). At the bottom, there are three summary fields: "Net" (£0.00), "VAT" (£0.00), and "Total" (£0.00). Three buttons are at the bottom: "Cancel", "Another", and "Save". The "Amount" field is highlighted with an orange circle.

14 Click **"Save"** to create the expense

This screenshot shows the same "Add Regular Expense" form, but the "Amount" field is now £10.00. The "Net" field is £10.00, "VAT" is £2.00, and "Total" is £12.00. The "Save" button at the bottom right is highlighted with an orange circle.

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

Regular Expenses

Total £ 40.00 Total Live £ 30.00 Total Pending £

Search 10

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

Edit
Cancel
Delete

1 to 3 of 3 Page 1 of 1

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