

# Creating and Managing Regular Service Charges in CRM



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

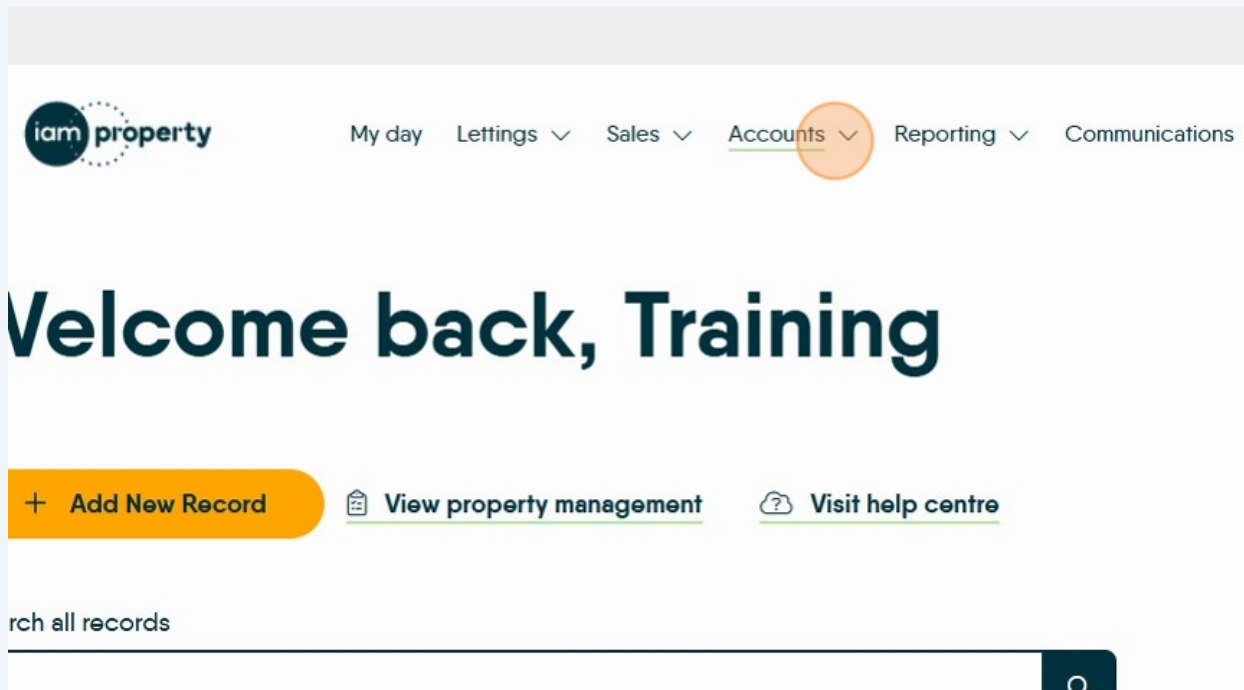
By following these instructions, you can streamline your property management processes, ensuring accurate billing and record-keeping for tenants. The clear navigation and detailed actions help eliminate confusion, making it easier to handle expenses and invoicing.

## Service Charges

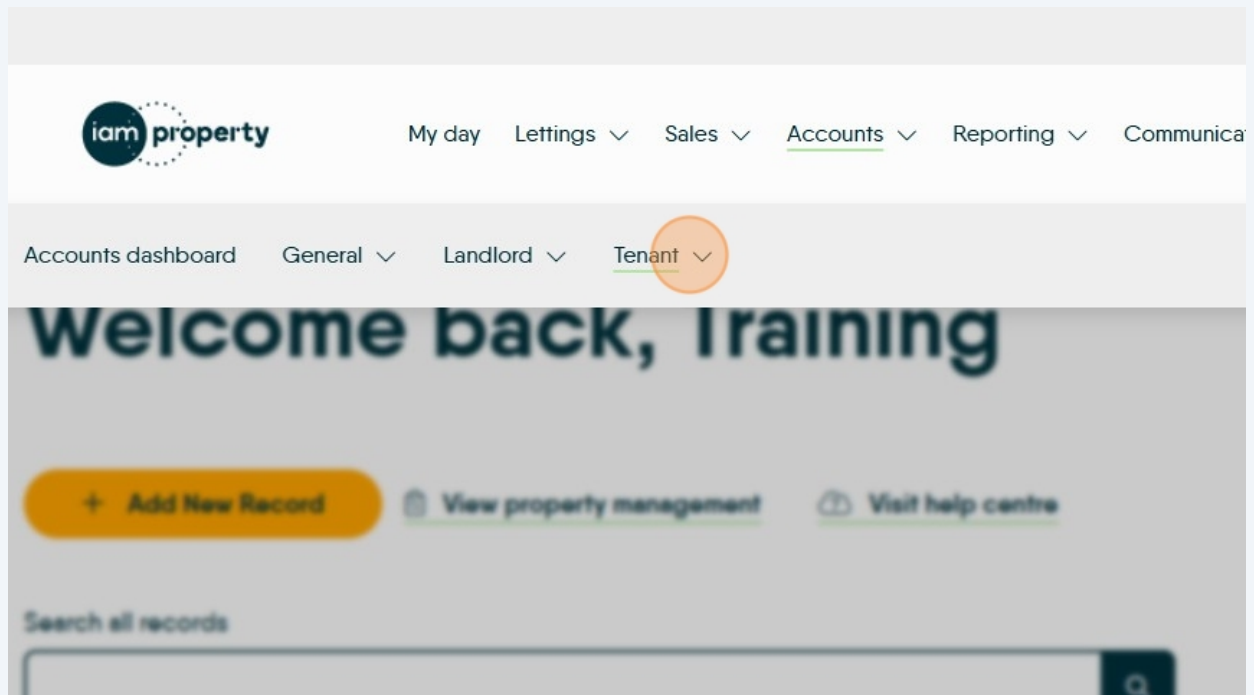


Service Charges are charged to a tenant for providing services e.g. cleaning common areas. There are Tenant and Landlord Service charges. Landlord Service Charges are charged to the tenant and paid to the Landlord.

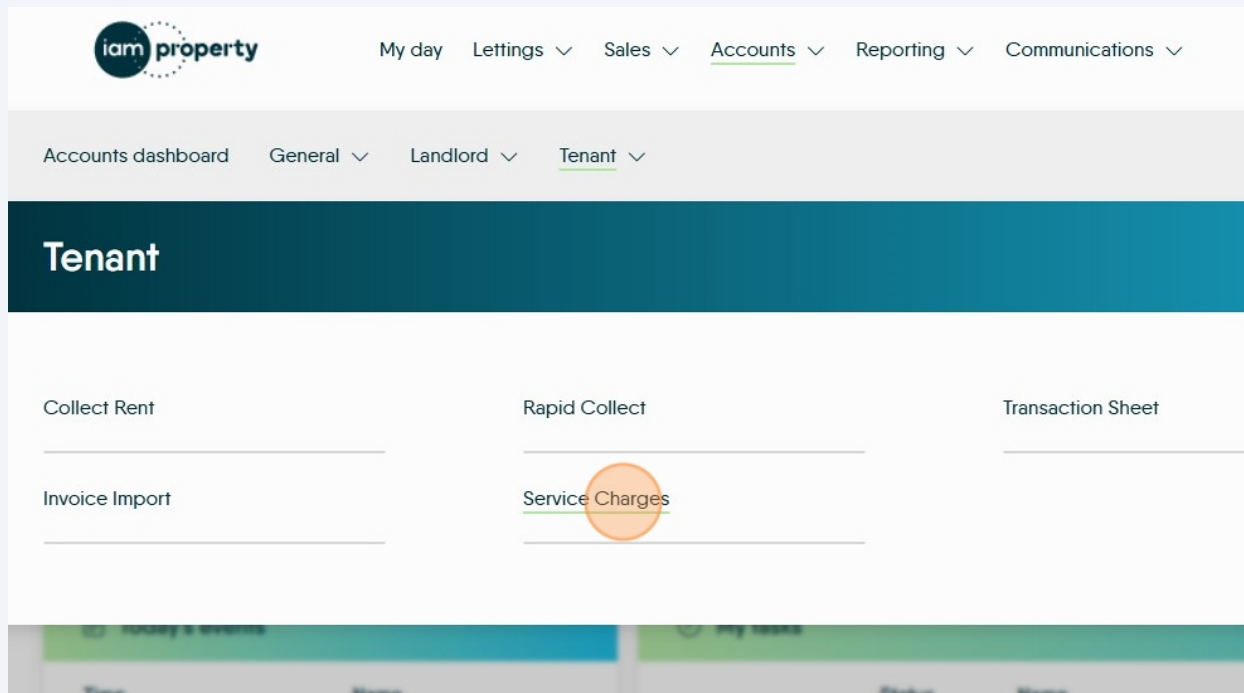
### 1 Click "**Accounts**"



## 2 Click "Tenant"



## 3 Click "Service Charges"



- 4 To add a new **"Service Charge"** click here.

The screenshot shows the 'iam property' dashboard. The 'Accounts' menu is highlighted. Below it, there's a section titled 'Add Service Charges' with a '+' icon. Below this is a table with the following columns: Tenant, Property, Type, and Description.

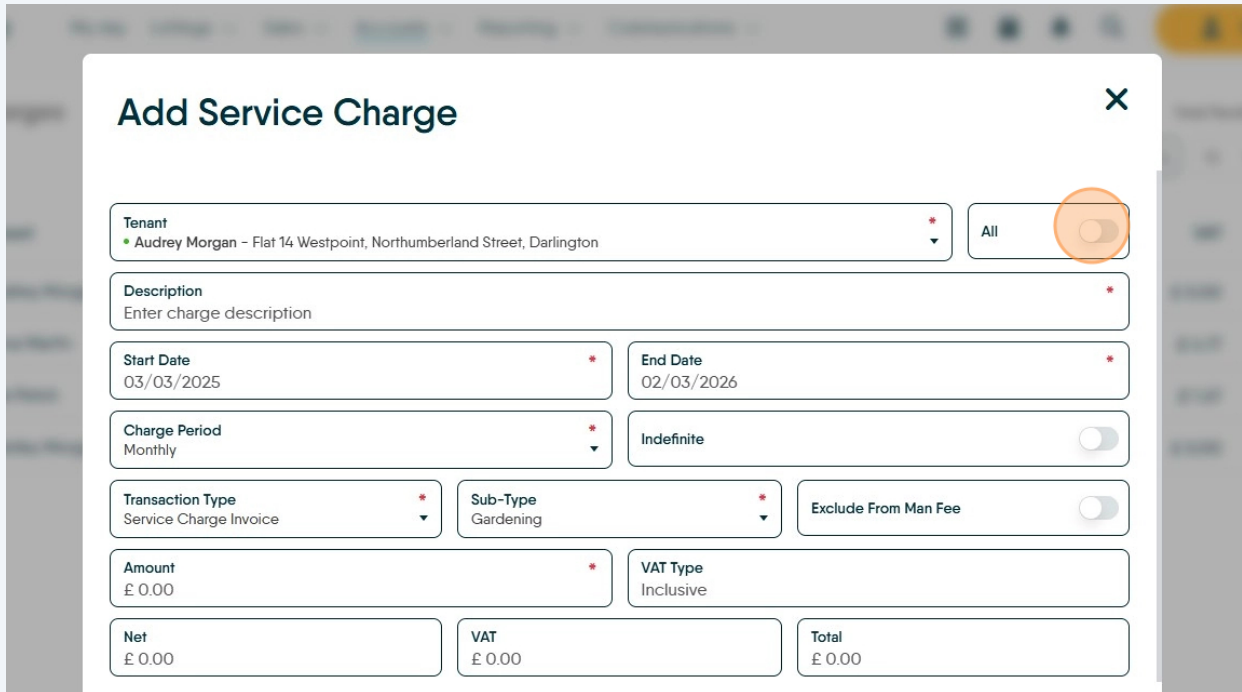
Tenant	Property	Type	Description
Audrey Morgan	Flat 14 Westpoint, Northu...	Landlord Service Charge...	Landscaping Fee
Lona Martin	9 Oakwood Drive, Darlin...	Service Charge Invoice	water
Ella Petch	24 Westgarth Terrace, D...	Service Charge Invoice	Service Charge - C
Stanley Morgan	Flat 2 Chesterfields, Stan	Landlord Service Charge	Cleaning

- 5 Click **"Select tenant"** and add search for and select the tenant.

The screenshot shows the 'Add Service Charge' form. The 'Tenant' field is highlighted with an orange circle. The form includes the following fields:

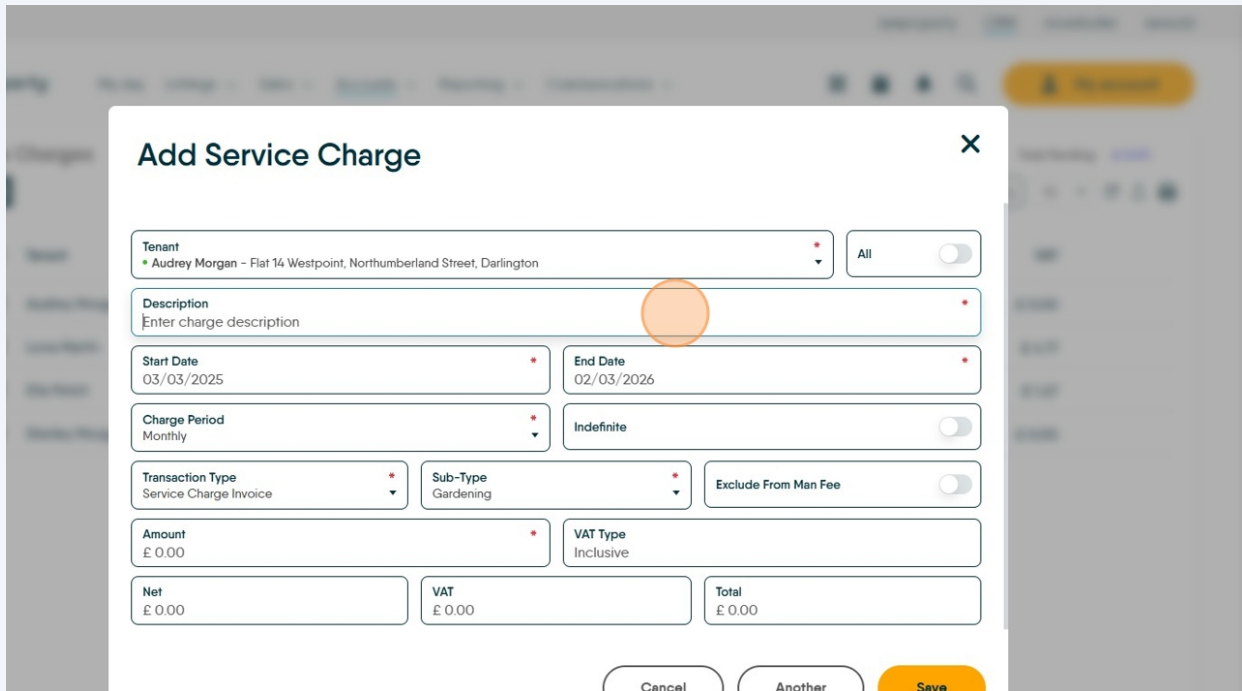
- Tenant: Select tenant (highlighted)
- Description: Enter charge description
- Start Date: 03/03/2025
- End Date: 02/03/2026
- Charge Period: Monthly
- Indefinite: (toggle)
- Transaction Type: Service Charge Invoice
- Sub-Type: Gardening
- Exclude From Man Fee: (toggle)

- 6 If you want to create the service charge to ALL tenants click here.



The screenshot shows the 'Add Service Charge' form. The 'Tenant' field is set to 'Audrey Morgan - Flat 14 Westpoint, Northumberland Street, Darlington'. The 'All' toggle switch is highlighted with an orange circle, indicating it should be turned on to apply the charge to all tenants. Other fields include 'Description' (placeholder: Enter charge description), 'Start Date' (03/03/2025), 'End Date' (02/03/2026), 'Charge Period' (Monthly), 'Transaction Type' (Service Charge Invoice), 'Sub-Type' (Gardening), 'Exclude From Man Fee' (toggle off), 'Amount' (£ 0.00), 'VAT Type' (Inclusive), 'Net' (£ 0.00), 'VAT' (£ 0.00), and 'Total' (£ 0.00).

- 7 Click the "**Description**" field and clearly describe the charge.



The screenshot shows the 'Add Service Charge' form. The 'Description' field is highlighted with an orange circle, indicating it should be clicked to enter a description for the charge. The 'All' toggle switch is also visible. Other fields include 'Tenant' (Audrey Morgan - Flat 14 Westpoint, Northumberland Street, Darlington), 'Start Date' (03/03/2025), 'End Date' (02/03/2026), 'Charge Period' (Monthly), 'Transaction Type' (Service Charge Invoice), 'Sub-Type' (Gardening), 'Exclude From Man Fee' (toggle off), 'Amount' (£ 0.00), 'VAT Type' (Inclusive), 'Net' (£ 0.00), 'VAT' (£ 0.00), and 'Total' (£ 0.00). At the bottom, there are buttons for 'Cancel', 'Another', and 'Save'.

8 Click the **"Start Date"** field.

The screenshot shows the 'Add Service Charge' form. The 'Start Date' field, containing '03/03/2025', is highlighted with an orange circle. Other fields include 'Tenant' (Audrey Morgan - Flat 14 Westpoint, Northumberland Street, Darlington), 'Description' (test service charge), 'End Date' (02/03/2026), 'Charge Period' (Monthly), 'Transaction Type' (Service Charge Invoice), 'Sub-Type' (Gardening), 'Exclude From Man Fee' (toggle), 'Amount' (£ 0.00), 'VAT Type' (Inclusive), 'Net' (£ 0.00), 'VAT' (£ 0.00), and 'Total' (£ 0.00). Buttons at the bottom are 'Cancel', 'Another', and 'Save'.

9 Click the **"End Date"** field or select the Indefinite option  
Click **"Indefinite"** if required

The screenshot shows the 'Add Service Charge' form with a calendar widget open for the 'Start Date' field. The 'End Date' field, containing '02/03/2026', is highlighted with an orange circle. The calendar shows March 2025, with the 3rd selected. Other fields are the same as in the previous screenshot. Buttons at the bottom are 'Cancel', 'Another', and 'Save'.

**10** Click "**Charge Period**" to set the frequency of the charge from the drop down list.

**10** Click "**Charge Period**" to set the frequency of the charge from the drop down list.

## 11 Click "Service Charge Invoice"

**Add Service Charge**

Tenant  
Audrey Morgan - Flat 14 Westpoint, Northumberland Street, Darlington

Description  
test service charge

Start Date  
03/03/2025

End Date  
Select end date

Charge Period  
Monthly

Indefinite

Transaction Type  
Service Charge Invoice

Sub-Type  
Gardening

Exclude From Man Fee

Amount  
£ 0.00

VAT Type  
Inclusive

Net  
£ 0.00

VAT  
£ 0.00

Total  
£ 0.00

Cancel Another Save

## 12 There are 2 options "Service Charge Invoice" and "Landlord Service Charge Invoice"

Tenant  
Audrey Morgan - Flat 14 Westpoint, Northumberland Street, Darlington

Description  
test service charge

Start Date  
03/03/2025

End Date  
Select end date

Charge Period  
Monthly

Indefinite

Transaction Type  
Service Charge Invoice

Sub-Type  
Gardening

Exclude From Man Fee

VAT Type  
Inclusive

VAT  
£ 0.00

Total  
£ 0.00

Service Charge Invoice

Landlord Service Charge Invoice



13

Click **"Sub Type"** and note what type of charge this is e.g. gardening, general maintenance. This list is editable in the Accounts configuration menu, Transaction Sub Types - Service Charges.

The screenshot shows the 'Add Service Charge' form. The 'Sub-Type' dropdown menu is open, showing 'Gardening' as the selected option. The form includes fields for Tenant, Description, Start Date, End Date, Charge Period, Indefinite, Transaction Type, Sub-Type, Exclude From Man Fee, VAT Type, VAT, and Total. The 'Save' button is highlighted in orange.

14

Click here to exclude this fee from being charged a Management Fee

The screenshot shows the 'Add Service Charge' form. The 'Exclude From Man Fee' toggle switch is turned on. The form includes fields for Tenant, Description, Start Date, End Date, Charge Period, Indefinite, Transaction Type, Sub-Type, Exclude From Man Fee, VAT Type, VAT, and Total. The 'Save' button is highlighted in orange.



15

Click the **"Amount"** field and add the value for the Service Charge you are charging.

The Sub-Type chosen controls the VAT Type, this can be edited in the Accounts Lookups menu.

The screenshot shows a form for creating a service charge. The 'Amount' field is highlighted with an orange circle and contains '£ 0.00'. An orange box highlights the 'Sub-Type' dropdown (set to 'Gardening') and the 'VAT Type' dropdown (set to 'Inclusive'). An arrow points from the 'Sub-Type' dropdown to the 'VAT Type' dropdown. The form also includes fields for Tenant, Description, Start Date, End Date, Charge Period, Transaction Type, and Exclude From Man Fee. At the bottom, there are buttons for 'Cancel', 'Another', and 'Save'.

Tenant	Audrey Morgan - Flat 14 Westpoint, Northumberland Street, Darlington	
Description	test service charge	
Start Date	03/03/2025	End Date Select end date
Charge Period	Monthly	Indefinite
Transaction Type	Service Charge Invoice	Exclude From Man Fee
Sub-Type	Gardening	VAT Type Inclusive
Amount	£ 0.00	
Net	£ 0.00	Total £ 0.00

16

The VAT is broken out based on the VAT rate charged. This is controlled in Accounts Configuration.

The screenshot shows the same form as above, but with the 'Amount' field updated to '£ 10.00'. The 'Net' and 'VAT' fields at the bottom are highlighted with an orange box, showing '£ 8.33' and '£ 1.67' respectively. The 'Total' field remains '£ 10.00'. The 'Sub-Type' and 'VAT Type' are still 'Gardening' and 'Inclusive'.

Description	test service charge	
Start Date	03/03/2025	End Date Select end date
Charge Period	Monthly	Indefinite
Transaction Type	Service Charge Invoice	Exclude From Man Fee
Sub-Type	Gardening	VAT Type Inclusive
Amount	£ 10.00	
Net	£ 8.33	Total £ 10.00
VAT	£ 1.67	

17 Click here to **"Save"**.

### Add Service Charge

Tenant  
Audrey Morgan - Flat 14 Westpoint, Northumberland Street, Darlington

Description  
test service charge

Start Date  
03/03/2025

End Date  
Select end date

Charge Period  
Monthly

Indefinite

Transaction Type  
Service Charge Invoice

Sub-Type  
Gardening

Exclude From Man Fee

Amount  
£ 10.00

VAT Type  
Inclusive

Net  
£ 8.33

VAT  
£ 1.67

Total  
£ 10.00

Cancel Another **Save**

18 Click "Service Charge Invoice"

### Add Service Charge

Tenant  
Select tenant

Description  
Enter charge description

Start Date  
03/03/2025

End Date  
02/03/2026

Charge Period  
Monthly

Indefinite

Transaction Type  
Service Charge Invoice

Sub-Type  
Gardening

Exclude From Man Fee

Amount  
£ 0.00

VAT Type  
Inclusive

Net  
£ 0.00

VAT  
£ 0.00

Total  
£ 0.00

Cancel Another **Save**

# Landlord Service Charge

19

To create a service charge to the Landlord. Click "**Landlord Service Charge Invoice**"

### Add Service Charge

Tenant  
Select tenant

All

Description  
Enter charge description

Start Date  
03/03/2025

End Date  
02/03/2026

Charge Period  
Monthly

Indefinite

Transaction Type  
Service Charge Invoice

Sub-Type  
Gardening

Exclude From Man Fee

Service Charge Invoice

Landlord Service Charge Invoice

VAT Type  
Inclusive

VAT  
£ 0.00

Total  
£ 0.00

Cancel

Another

Save

- 20 Click **"Select tenant"** and add/search the tenant name.

## Add Service Charge

Tenant  
Select tenant

All

Description  
Enter charge description

Start Date  
05/09/2025

End Date  
04/09/2026

Charge Period  
Monthly

Indefinite

Transaction Type  
Landlord Service Charge Invoice

Sub-Type  
Landlord Service Charge

Exclude From Man Fee

Amount  
£ 0.00

VAT Type  
Exempt

Net

VAT

Total

- 21 To select **"All Tenants"** Click here.

## Service Charge

h - 24 Westgarth Terrace, Darlington

All

Description  
arge description

025

End Date  
04/09/2026

riod

Indefinite

n Type  
ervice Charge Invoice

Sub-Type  
Landlord Service Charge

Exclude From Man Fee

VAT Type  
Exempt

22

Click the "**Description**" field. Add a description of the service charge being applied

## Add Service Charge ✕

Tenant

• Ella Petch – 24 Westgarth Terrace, Darlington

▼

All

☐

Description

Enter charge description

Start Date

05/09/2025

End Date

04/09/2026

Charge Period

Monthly

Indefinite

☐

Transaction Type

Landlord Service Charge Invoice

Sub-Type

Landlord Service Charge

Exclude From Man Fee

☐

Amount

£ 0.00

VAT Type

Exempt

23

Click the "**Start Date**" field, set the start date for the charge (can be backdated)

## Add Service Charge ✕

Tenant

• Ella Petch – 24 Westgarth Terrace, Darlington

▼

All

☐

Description

Cleaning

Start Date

05/09/2025

End Date

04/09/2026

Charge Period

Monthly

Indefinite

☐

Transaction Type

Landlord Service Charge Invoice

Sub-Type

Landlord Service Charge

Exclude From Man Fee

☐

Amount

£ 0.00

VAT Type

Exempt

24 Click the **"End Date"** field.

The screenshot shows the 'Add Service Charge' form. The 'End Date' field, which contains '04/09/2026', is highlighted with an orange circle. Other fields include 'Tenant' (Ella Petch - 24 Westgarth Terrace, Darlington), 'Description' (Cleaning), 'Start Date' (05/09/2025), 'Charge Period' (Monthly), 'Transaction Type' (Landlord Service Charge Invoice), 'Amount' (£ 0.00), 'Net' (£ 0.00), 'Indefinite' (toggle), 'VAT Type' (Exempt), 'Exclude From Man Fee' (toggle), and 'Total' (£ 0.00). A calendar for September 2025 is open over the 'Start Date' field.

25 Select the **charge period**. For example click "Monthly"

The screenshot shows the 'Add Service Charge' form with the 'Charge Period' dropdown menu open. The 'Monthly' option is highlighted with an orange circle. The dropdown menu lists 'Monthly', 'Quarterly', 'Half Yearly', and 'Yearly'. The form fields are the same as in the previous screenshot, but the 'End Date' field is no longer highlighted. The 'Save' button is highlighted in orange.

**26** To set **"Indefinite"** length charge click here.

The screenshot shows a form with several fields. At the top, there is a dropdown menu with 'lington' selected and a red asterisk. To its right is a toggle switch labeled 'All'. Below this is a text field with a red asterisk. Further down, there is a field for 'End Date' with the value '04/09/2026' and a red asterisk. Below that is a field for 'Indefinite' with a red asterisk and a red circle highlighting the toggle switch. To the right of this is a toggle switch labeled 'Exclude From Man Fee'. Below these are two more fields: 'Sub-Type' with the value 'Landlord Service Charge' and a red asterisk, and 'VAT Type' with the value 'Exempt' and a red asterisk. At the bottom, there are three fields: 'VAT' with the value '£ 0.00', 'Total' with the value '£ 0.00', and a red asterisk.

**27** Click **"Landlord Service Charge"**

The screenshot shows a form with several fields. At the top, there is a dropdown menu with 'Ella Petch - 24 Westgarth Terrace, Darlington' selected and a red asterisk. To its right is a toggle switch labeled 'All'. Below this is a field for 'Description' with the value 'Cleaning' and a red asterisk. Further down, there are two fields: 'Start Date' with the value '05/09/2025' and a red asterisk, and 'End Date' with the value '04/09/2026' and a red asterisk. Below these are two more fields: 'Charge Period' with the value 'Monthly' and a red asterisk, and 'Indefinite' with a red asterisk and a red circle highlighting the toggle switch. To the right of this is a toggle switch labeled 'Exclude From Man Fee'. Below these are three fields: 'Transaction Type' with the value 'Landlord Service Charge Invoice' and a red asterisk, 'Sub-Type' with the value 'Landlord Service Charge' and a red asterisk, and 'VAT Type' with the value 'Exempt' and a red asterisk. At the bottom, there are three fields: 'Amount' with the value '£ 0.00' and a red asterisk, 'Net' with the value '£ 0.00', and 'VAT' with the value '£ 0.00'. To the right of these are two fields: 'Total' with the value '£ 0.00' and a red asterisk, and a red asterisk. At the bottom right, there are three buttons: 'Cancel', 'Another', and 'Save'.



28

Click here to set the **"Sub Type"** this can control the VAT charge for the transaction.

To exclude the transaction from being charged a **"Management Fee"** click here.

The screenshot shows the 'Add Service Charge' form with the following fields and values:

- Tenant:** Ella Petch - 24 Westgarth Terrace, Darlington
- Description:** Cleaning
- Start Date:** 05/09/2025
- End Date:** 04/09/2026
- Charge Period:** Monthly
- Indefinite:** ☐
- Transaction Type:** Landlord Service Charge Invoice
- Sub-Type:** Landlord Service Charge (dropdown menu is open showing options: Landlord Service Charge, Rent Guarantee Invoice, VAT Exempt, VAT Inclusive, VAT Exclusive)
- Exclude From Man Fee:** ☐
- Amount:** £ 0.00
- Net:** £ 0.00
- Total:** £ 0.00

Buttons at the bottom: Another, Save.

29

Click the **"Amount"** field to add the actual cost of the service charge.

The screenshot shows the 'Add Service Charge' form with the following fields and values:

- Tenant:** Ella Petch - 24 Westgarth Terrace, Darlington
- Description:** Cleaning
- Start Date:** 05/09/2025
- End Date:** 04/09/2026
- Charge Period:** Monthly
- Indefinite:** ☐
- Transaction Type:** Landlord Service Charge Invoice
- Sub-Type:** Landlord Service Charge
- Exclude From Man Fee:** ☐
- Amount:** £ 0.00 (highlighted with an orange circle)
- VAT Type:** Exempt
- Net:** £ 0.00
- VAT:** £ 0.00
- Total:** £ 0.00

Buttons at the bottom: Cancel, Another, Save.

30 Click the "VAT Type" field.

**Add Service Charge**

Tenant  
Ella Petch - 24 Westgarth Terrace, Darlington

Description  
Cleaning

Start Date  
05/09/2025

End Date  
04/09/2026

Charge Period  
Monthly

Indefinite

Transaction Type  
Landlord Service Charge Invoice

Sub-Type  
Landlord Service Charge

Exclude From Man Fee

Amount  
£ 20

VAT Type  
Exempt

Net  
£ 20.00

VAT  
£ 0.00

Total  
£ 20.00

Cancel Another Save

31 The VAT breakdown will show here.

Description  
Cleaning

Start Date  
05/09/2025

End Date  
04/09/2026

Charge Period  
Monthly

Indefinite

Transaction Type  
Landlord Service Charge Invoice

Sub-Type  
Landlord Service Charge

Exclude From Man Fee

Amount  
£ 20.00

VAT Type  
Exempt

Net  
£ 20.00

VAT  
£ 0.00

Total  
£ 20.00

Cancel Another Save

32 Click "Save"

The screenshot shows a web form titled "Add Service Charge". The form contains the following fields and controls:

- Tenant:** A dropdown menu showing "Ella Petch - 24 Westgarth Terrace, Darlington".
- Description:** A text field containing "Cleaning".
- Start Date:** A date field showing "05/09/2025".
- End Date:** A date field showing "04/09/2026".
- Charge Period:** A dropdown menu showing "Monthly".
- Indefinite:** A toggle switch that is currently turned off.
- Transaction Type:** A dropdown menu showing "Landlord Service Charge Invoice".
- Sub-Type:** A dropdown menu showing "Landlord Service Charge".
- Exclude From Man Fee:** A toggle switch that is currently turned off.
- Amount:** A text field showing "£ 20.00".
- VAT Type:** A text field showing "Exempt".
- Net:** A text field showing "£ 20.00".
- VAT:** A text field showing "£ 0.00".
- Total:** A text field showing "£ 20.00".

At the bottom of the form, there are three buttons: "Cancel", "Another", and "Save". The "Save" button is highlighted with a blue circle.

33 The charge will then be charged to the tenant in the periods set.