

# 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

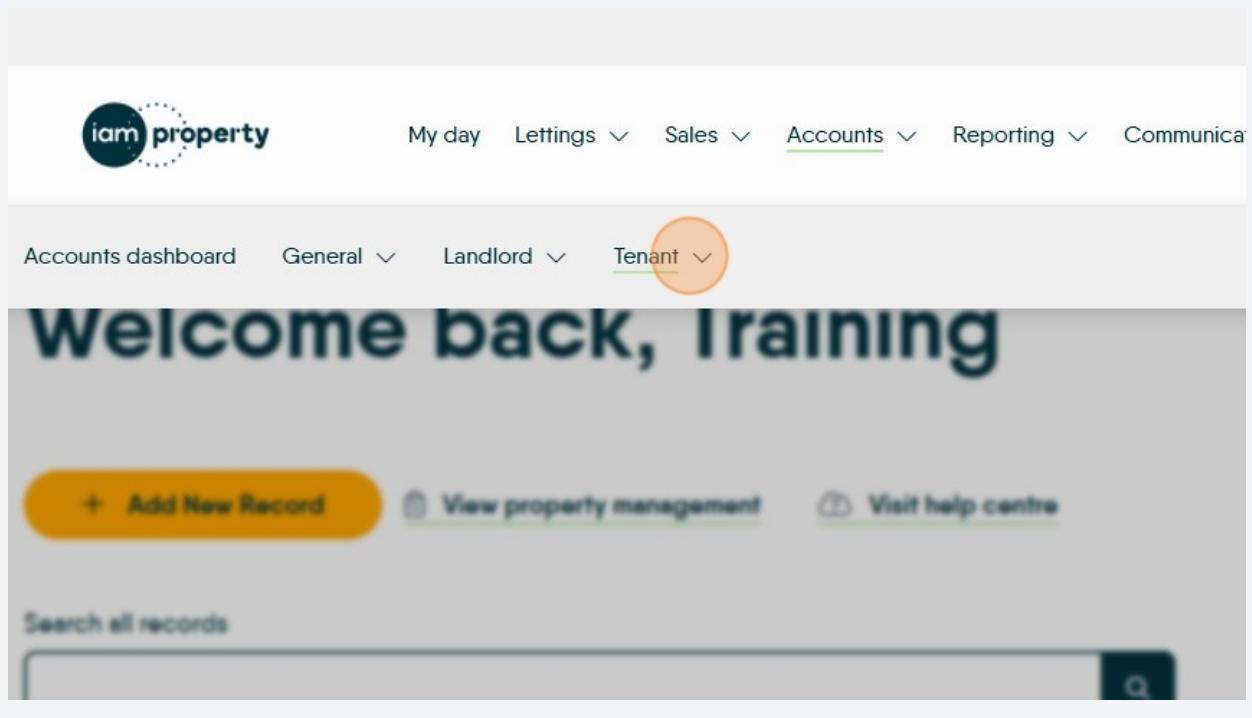


Service Charges are charged to a tenant for providing services e.g. cleaning common areas. There are Tenant and Landlord Service charges. Landlord Service Charges are charged to the tenant and paid to the Landlord.

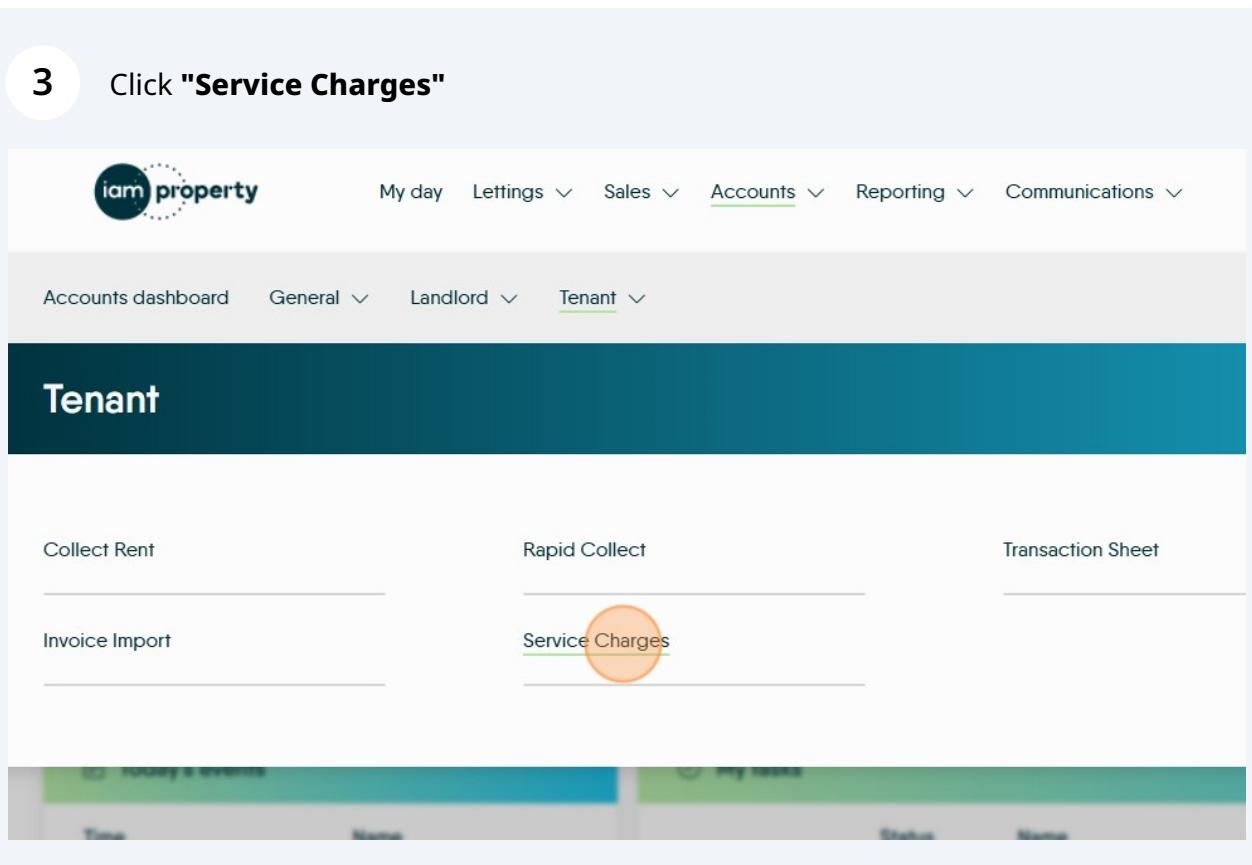
- 1 Click "**Accounts**"

The screenshot shows the iam property CRM interface. At the top, there is a navigation bar with the 'Accounts' tab highlighted in orange. Below the navigation bar, the main content area displays a welcome message: 'Welcome back, Training'. At the bottom of the screen, there is a search bar with the placeholder text 'Search all records' and a magnifying glass icon.

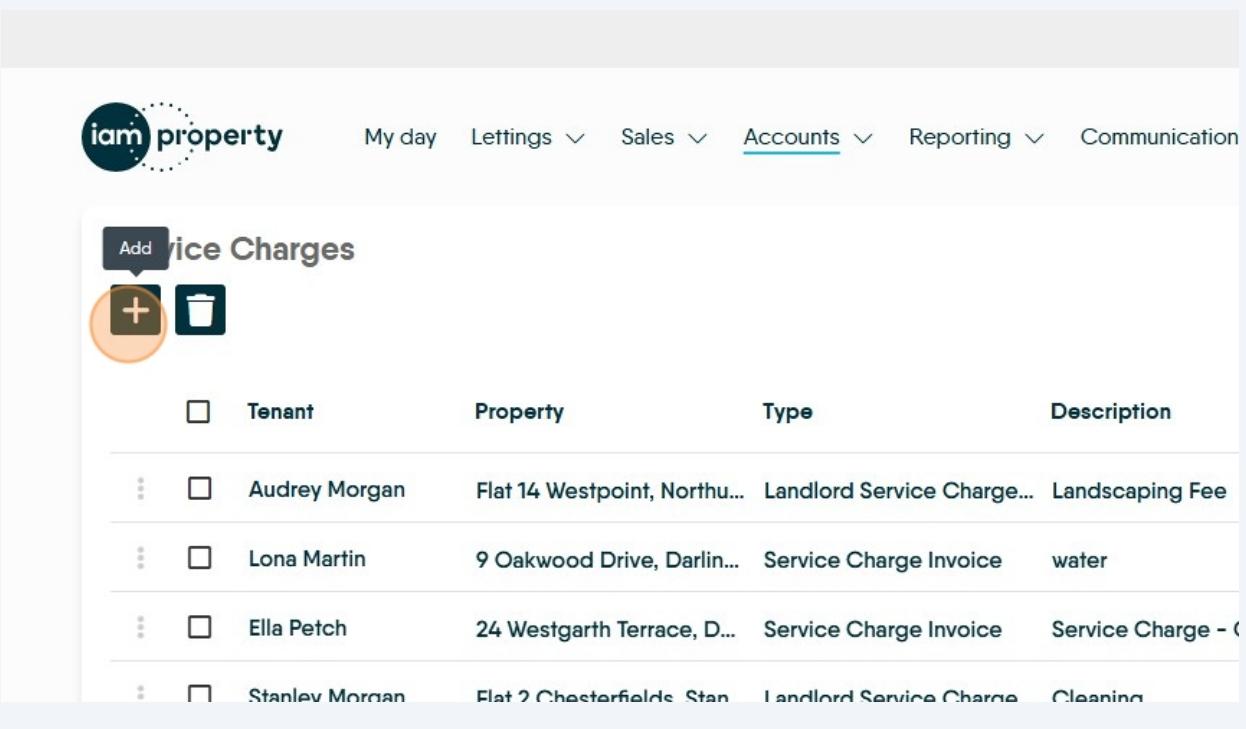
2 Click "Tenant"



3 Click "Service Charges"



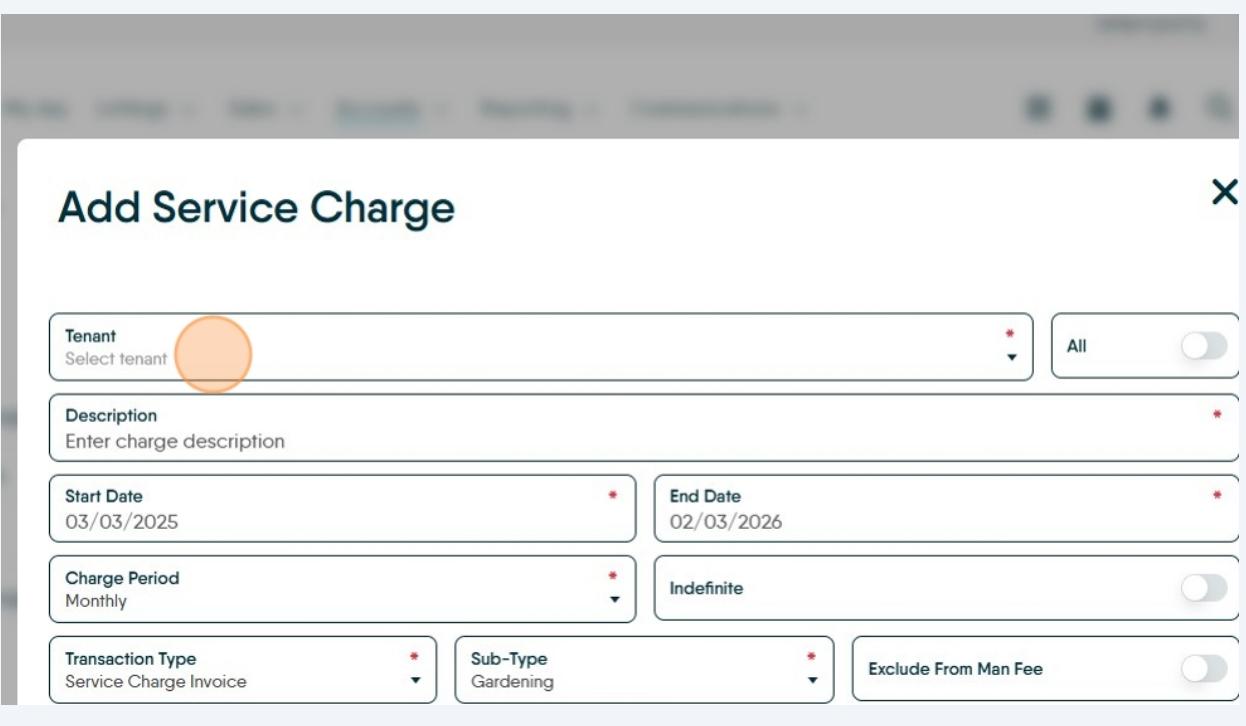
- 4 To add a new "Service Charge" click here.



The screenshot shows the 'Accounts' section of the iam property software. At the top, there are navigation links: 'My day', 'Lettings', 'Sales', 'Accounts' (which is underlined, indicating the current section), 'Reporting', and 'Communication'. Below this, a sub-menu titled 'Add Service Charges' is displayed, featuring a large orange circle around the 'Add' button. The main table lists service charges for different tenants, with columns for 'Tenant', 'Property', 'Type', and 'Description'. The first entry is for Audrey Morgan, a Landlord Service Charge for Landscaping Fee. The second entry is for Lona Martin, a Service Charge Invoice for water. The third entry is for Ella Petch, a Service Charge Invoice for Service Charge - C. The fourth entry is for Stanley Morgan, a Landlord Service Charge for Cleaning.

	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

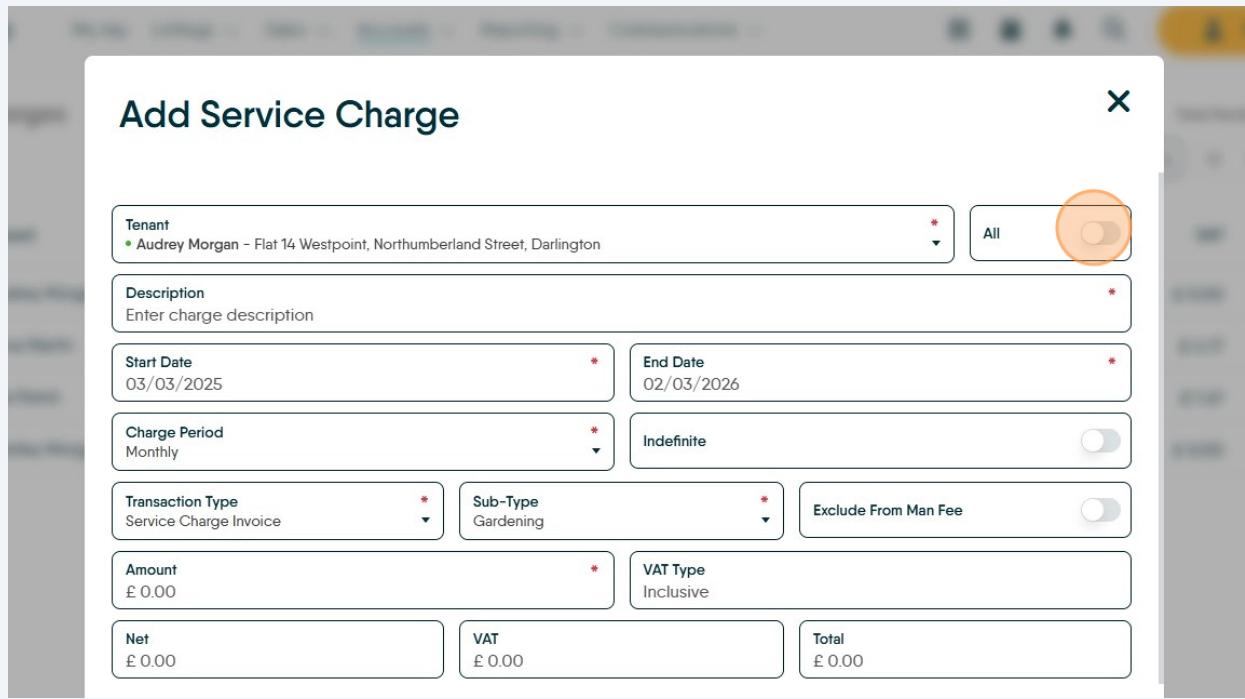
- 5 Click "Select tenant" and add search for and select the tenant.



The screenshot shows the 'Add Service Charge' dialog box. It includes fields for 'Tenant' (with a 'Select tenant' button), 'Description' (with a placeholder 'Enter charge description'), 'Start Date' (03/03/2025), 'End Date' (02/03/2026), 'Charge Period' (Monthly), 'Sub-Type' (Gardening), and 'Exclude From Man Fee' (a toggle switch). There are also buttons for 'All' and a close 'X' button.

Tenant Select tenant	All <input type="checkbox"/>	
Description Enter charge description	*	
Start Date 03/03/2025	End Date 02/03/2026	
Charge Period Monthly	Indefinite <input type="checkbox"/>	
Transaction Type Service Charge Invoice	Sub-Type Gardening	Exclude From Man Fee <input type="checkbox"/>

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



**Add Service Charge**

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

Description: 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:

Amount: £ 0.00

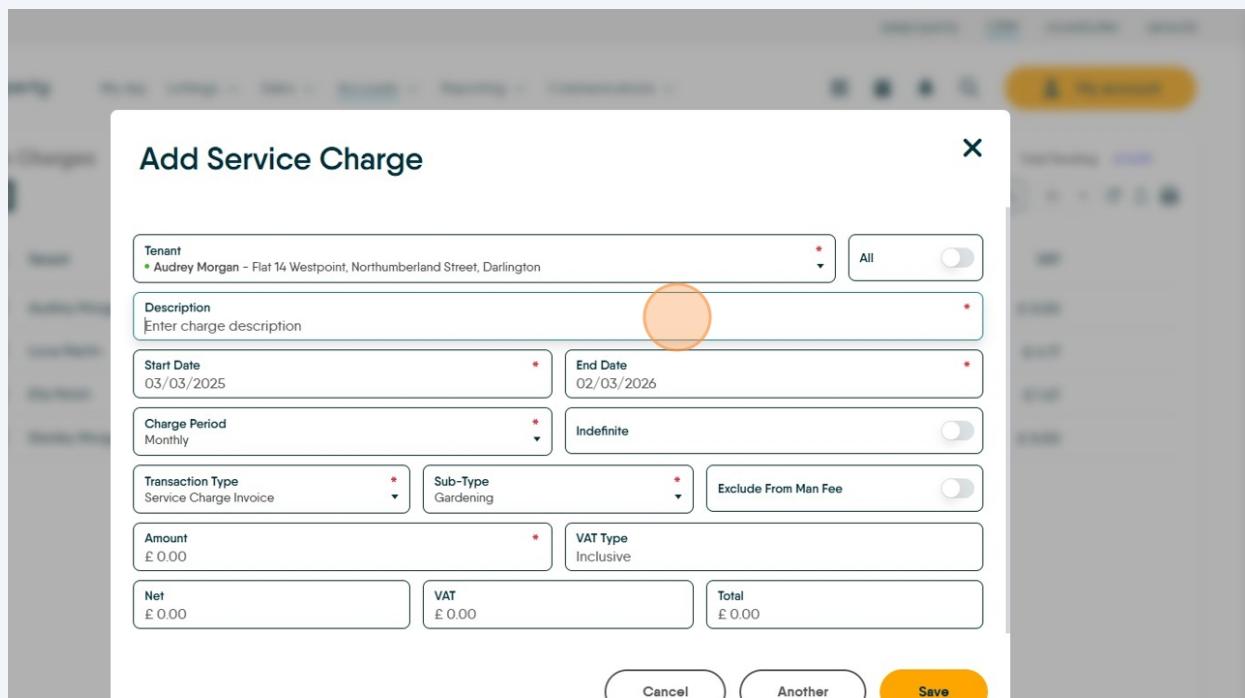
VAT Type: Inclusive

Net: £ 0.00

VAT: £ 0.00

Total: £ 0.00

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



**Add Service Charge**

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

Description: 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:

Amount: £ 0.00

VAT Type: Inclusive

Net: £ 0.00

VAT: £ 0.00

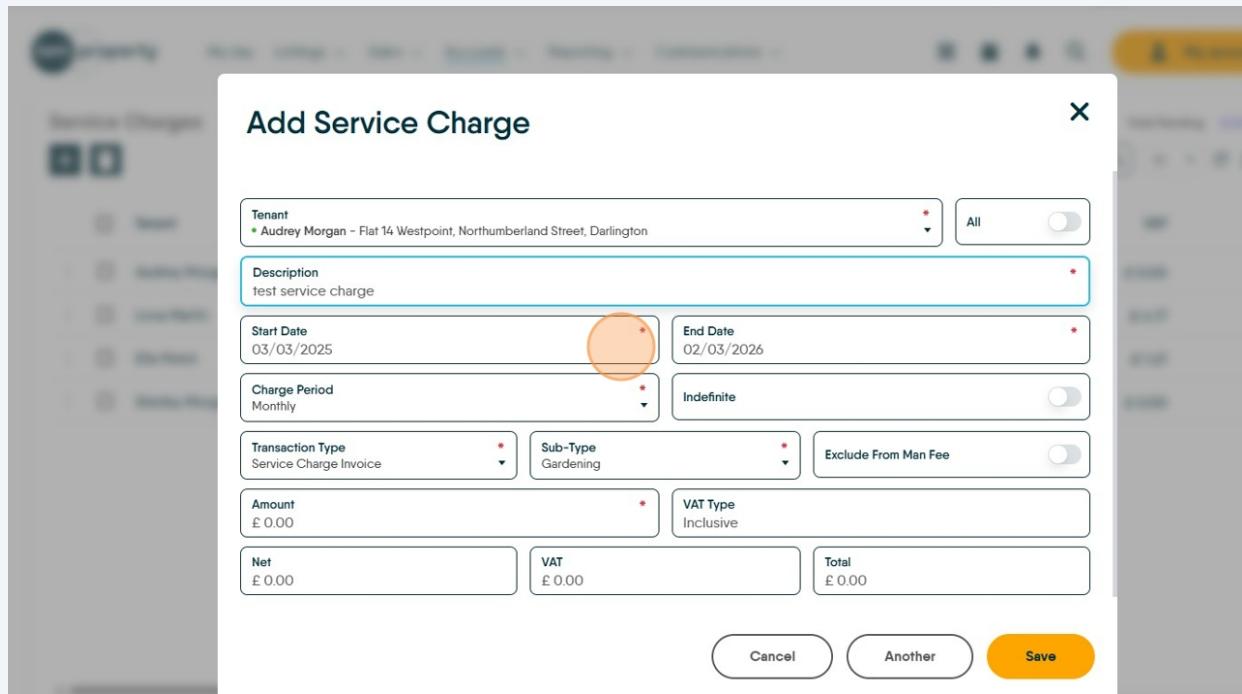
Total: £ 0.00

Cancel

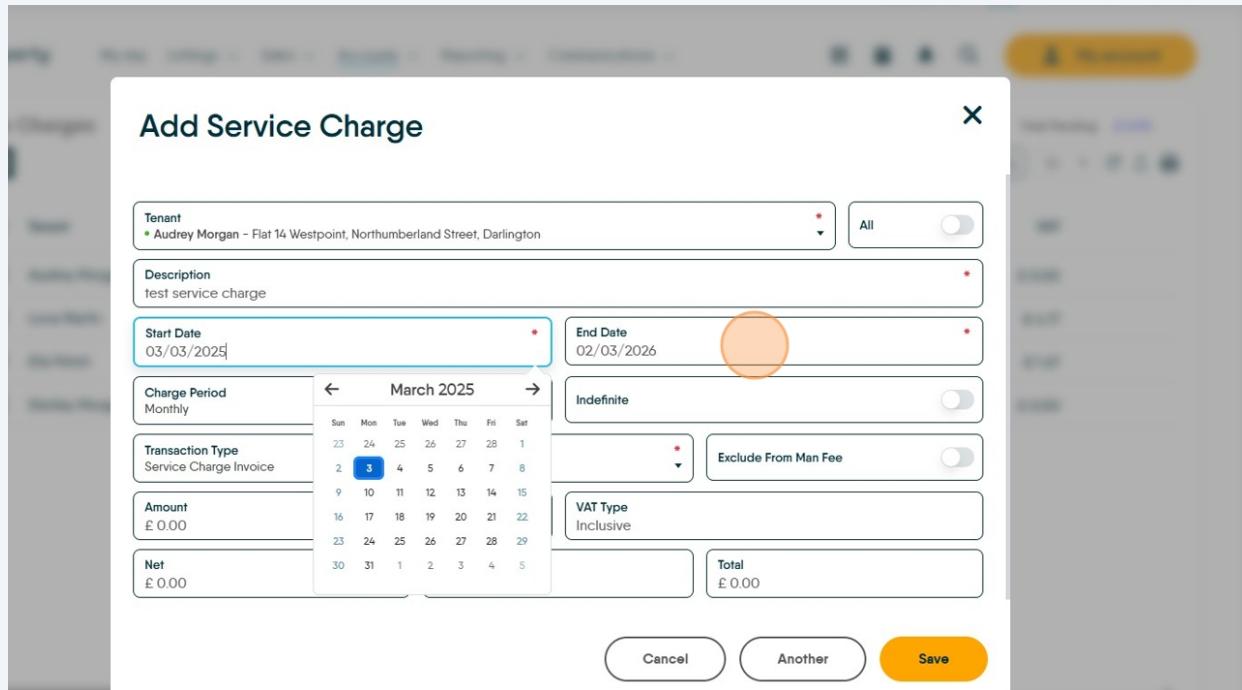
Another

Save

8 Click the "Start Date" field.



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



**Add Service Charge**

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

**Description**  
test service charge

**Start Date**  
03/03/2025

**End Date**  
02/03/2026

**Charge Period**  
Monthly

**Indefinite**

**Exclude From Man Fee**

**VAT Type**  
Inclusive

**Total**  
£ 0.00

**Cancel** **Another** **Save**

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

**Select tenant**

**Description**  
Enter charge description

**Start Date**  
05/09/2025

**End Date**  
04/09/2026

**Charge Period**  
Monthly

**Indefinite**

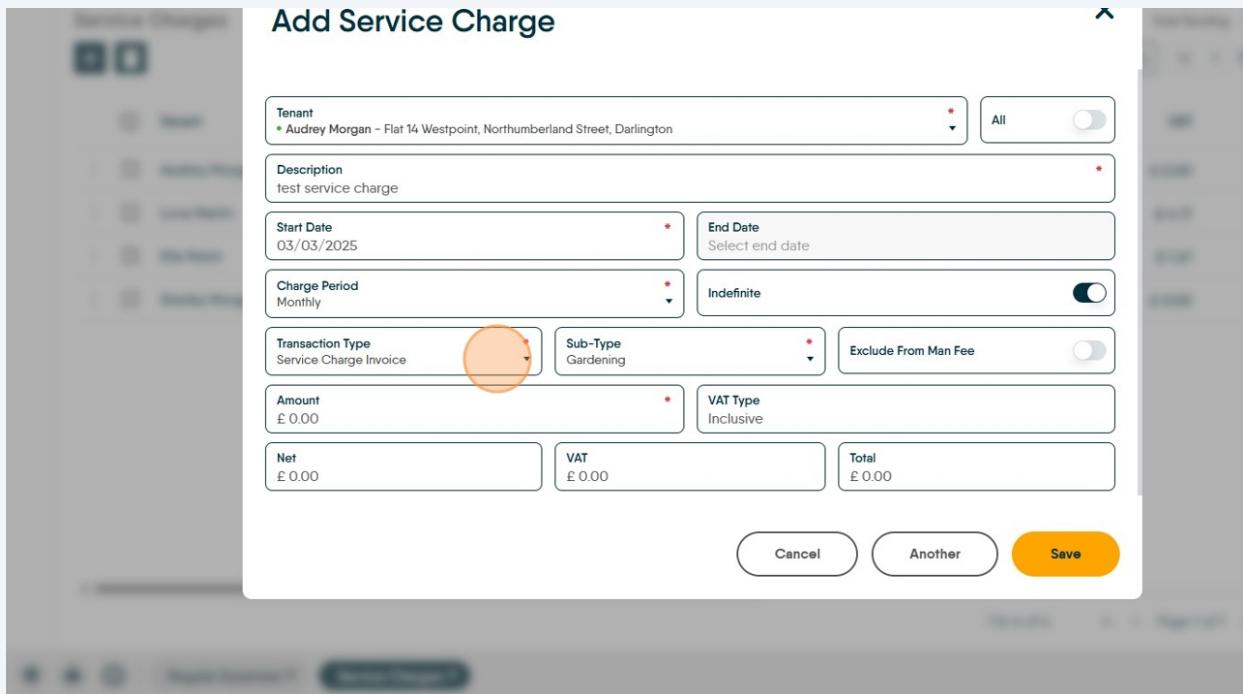
**Exclude From Man Fee**

**VAT Type**  
Inclusive

**Total**  
£ 0.00

**Cancel** **Another** **Save**

11 Click "Service Charge Invoice"



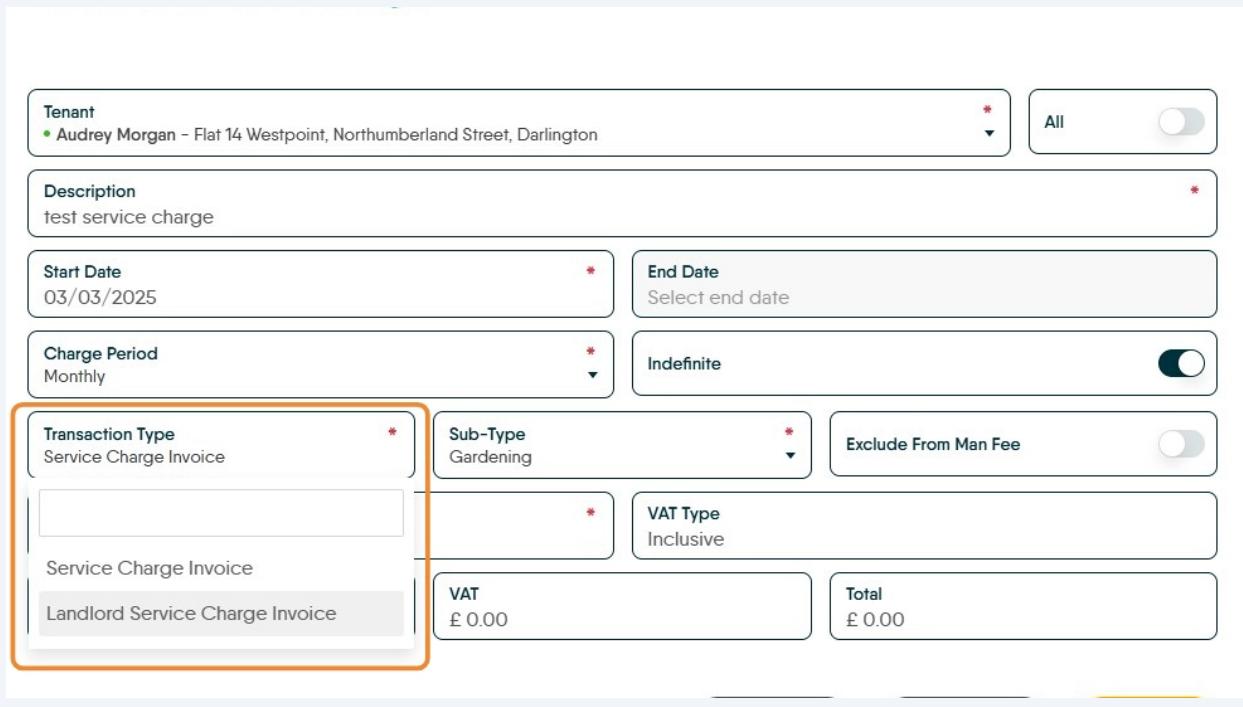
The screenshot shows the 'Add Service Charge' form. The 'Transaction Type' dropdown is set to 'Service Charge Invoice', which is highlighted with a red circle. The 'Sub-Type' dropdown is set to 'Gardening'. The 'Save' button at the bottom right is highlighted with a yellow box.

Form fields:

- 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

Buttons: Cancel, Another, Save

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



The screenshot shows the 'Add Service Charge' form. The 'Transaction Type' dropdown is open, showing two options: 'Service Charge Invoice' (selected) and 'Landlord Service Charge Invoice'. Both options are highlighted with a red box. The 'Sub-Type' dropdown is set to 'Gardening'. The 'Save' button at the bottom right is highlighted with a yellow box.

Form fields:

- 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:
- Service Charge Invoice
- Landlord Service Charge Invoice
- VAT Type: Inclusive
- VAT: £ 0.00
- Total: £ 0.00

Buttons: Cancel, Another, Save

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.

**Add Service Charge**

Tenant Audrey Morgan - Flat 14 Westpoint, Northumberland Street, Darlington	All <input type="checkbox"/>
Description test service charge	
Start Date 03/03/2025	End Date Select end date
Charge Period Monthly	Indefinite <input checked="" type="checkbox"/>
Transaction Type Service Charge Invoice	Sub-Type Gardening 
Exclude From Man Fee <input type="checkbox"/>	
Service Charge Invoice	VAT Type Inclusive
Landlord Service Charge Invoice	VAT £ 0.00
Total £ 0.00	
<input type="button" value="Cancel"/> <input type="button" value="Another"/> <input type="button" value="Save"/>	

14

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

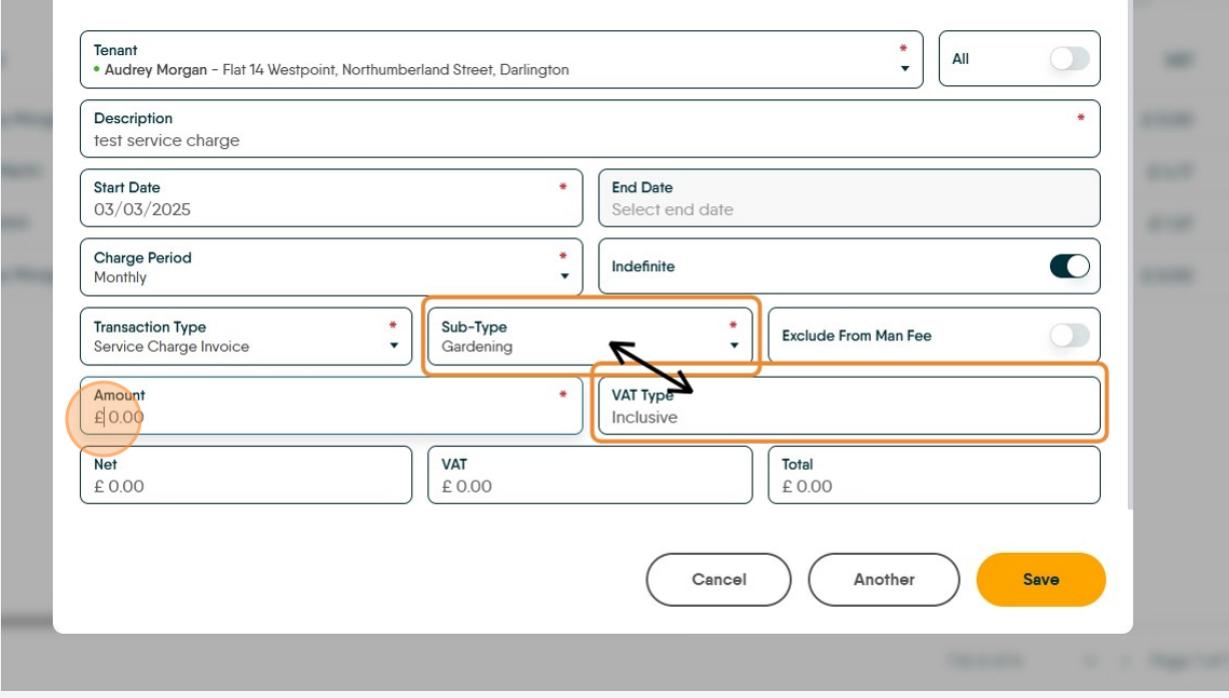
**Add Service Charge**

Tenant Audrey Morgan - Flat 14 Westpoint, Northumberland Street, Darlington	All <input type="checkbox"/>
Description test service charge	
Start Date 03/03/2025	End Date Select end date
Charge Period Monthly	Indefinite <input checked="" type="checkbox"/>
Transaction Type Service Charge Invoice	Sub-Type Gardening 
Amount £ 0.00	VAT Type Inclusive
Net £ 0.00	VAT £ 0.00
Total £ 0.00	
<input type="button" value="Cancel"/> <input type="button" value="Another"/> <input type="button" value="Save"/>	

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.



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

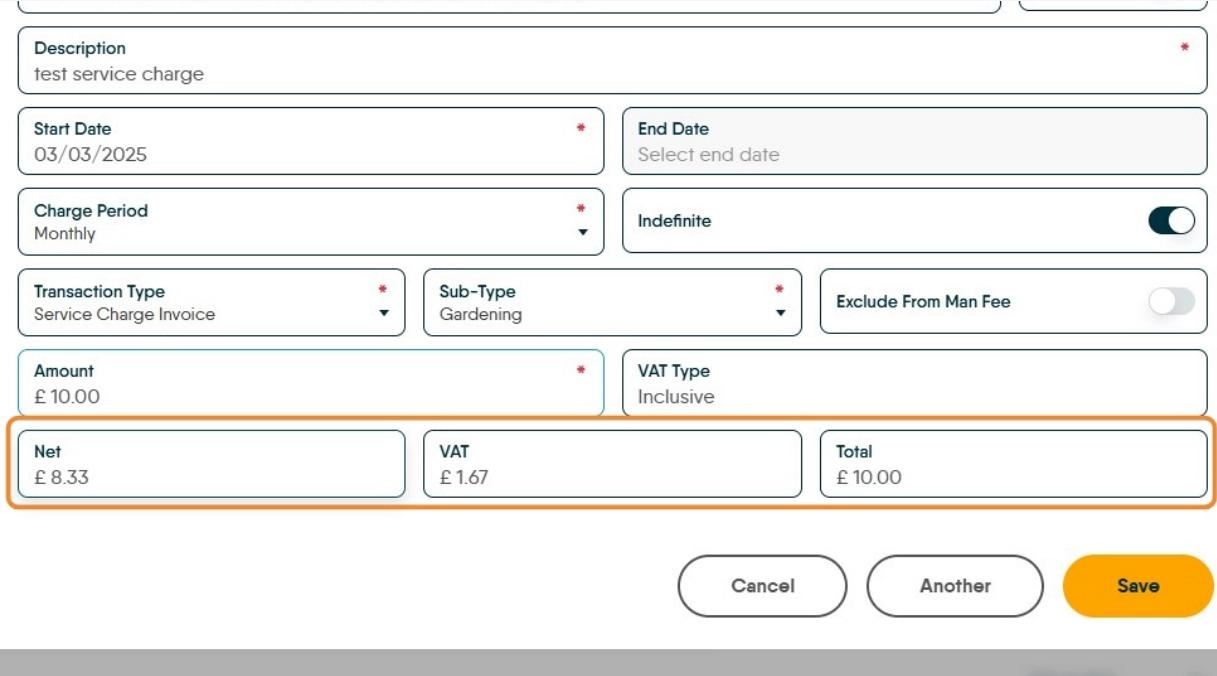
Cancel

Another

Save

16

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



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

17 Click here to "Save".

**Add Service Charge**

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

Description: test service charge

Start Date: 03/03/2025 End Date: Select end date

Charge Period: Monthly Indefinite toggle

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 All

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

Amount: £ 0.00 VAT Type: Inclusive

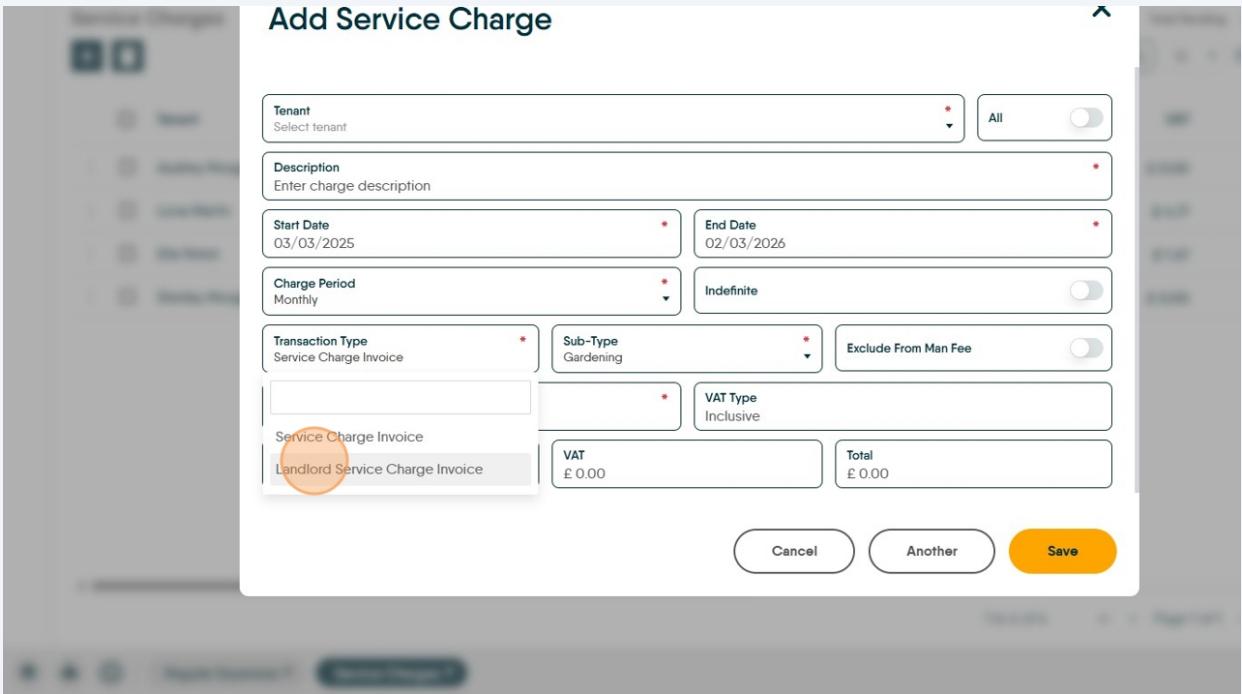
Net: £ 0.00 VAT: £ 0.00 Total: £ 0.00

Cancel Another Save

## Landlord Service Charge

19

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



The screenshot shows a 'Service Charge' dialog box. At the top, it says 'Add Service Charge'. The 'Type' dropdown is set to 'Service Charge Invoice', which is highlighted with an orange circle. Other options in the dropdown are 'Landlord Service Charge Invoice' and 'Landlord Service Charge'. The 'Save' button at the bottom right is highlighted with an orange rectangle. Other buttons are 'Cancel' and 'Another'.

**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**

**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**  **All**

**Description**

**Start Date**  **End Date**

**Charge Period**  **Indefinite**

**Transaction Type**  **Sub-Type**  **Exclude From Man Fee**

**Amount**  **VAT Type**

**Next** **VAT** **Total**

21 To select "All Tenants" Click here.

### Service Charge

**All**

**Charge description**

**Start Date**  **End Date**

**Charge Period**  **Indefinite**

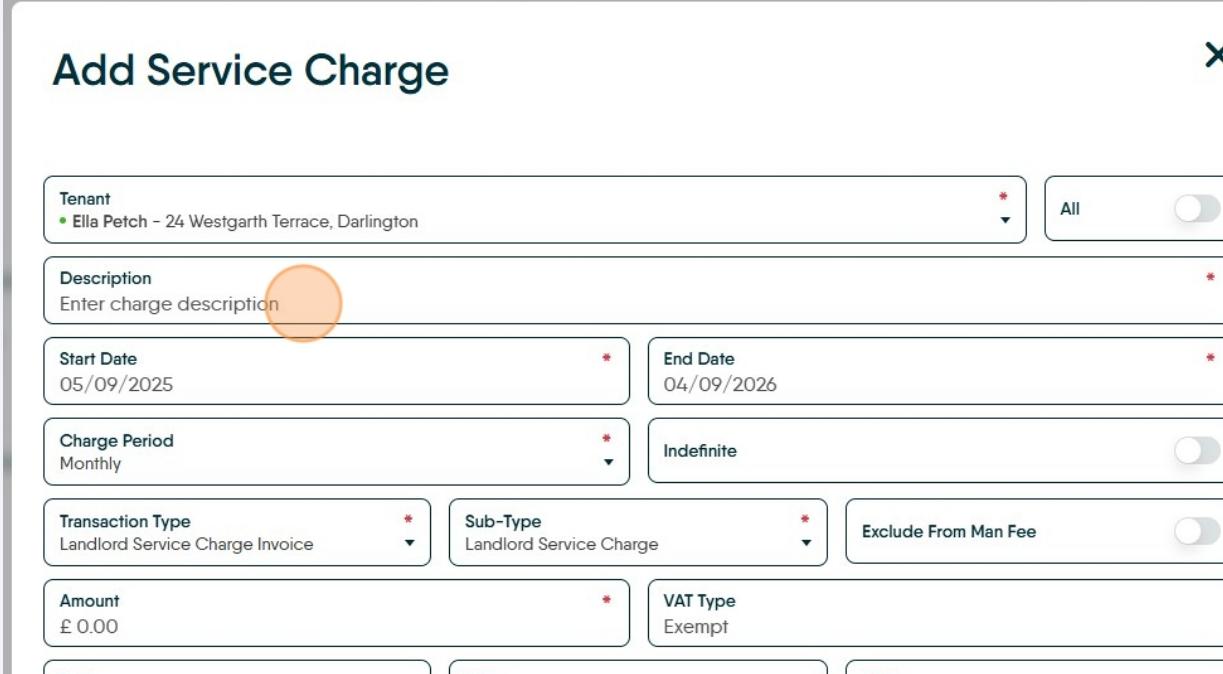
**Transaction Type**  **Sub-Type**  **Exclude From Man Fee**

**Amount**  **VAT Type**

22

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

**Add Service Charge**

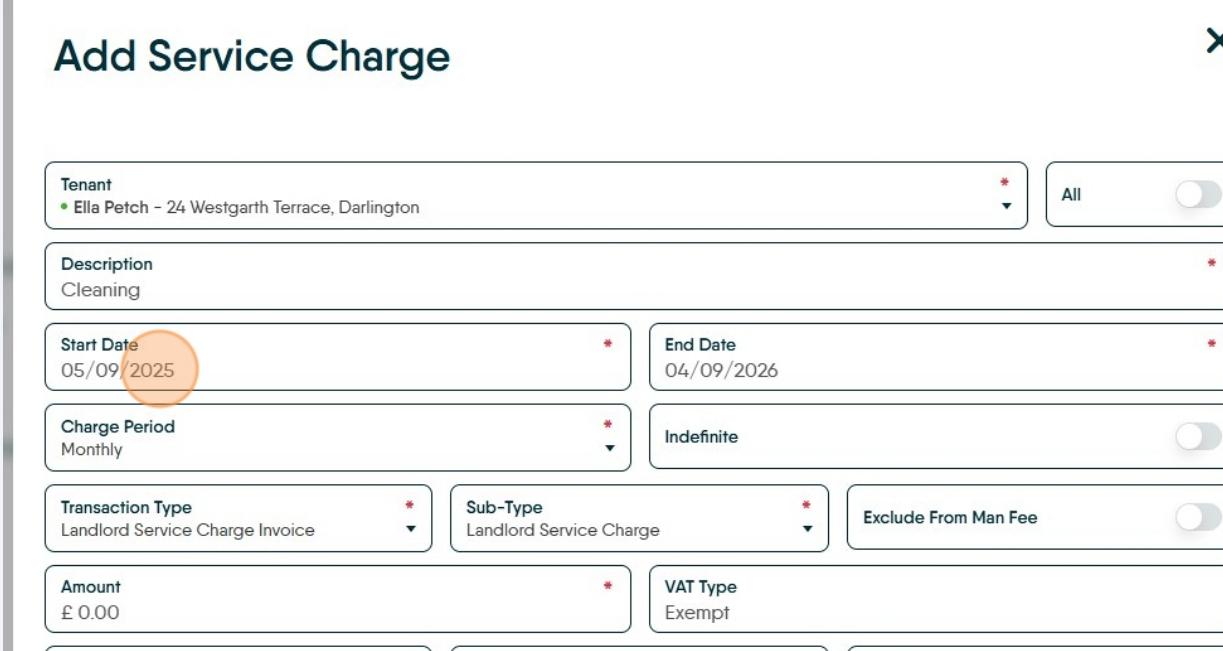


Tenant	Ella Petch - 24 Westgarth Terrace, Darlington	All		
Description	Enter charge description	*		
Start Date	05/09/2025	*		
End Date	04/09/2026	*		
Charge Period	Monthly	*		
Transaction Type	Landlord Service Charge Invoice	Sub-Type	Landlord Service Charge	Exclude From Man Fee
Amount	£ 0.00	VAT Type	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	*		
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.

**Add Service Charge**

Tenant • Ella Petch - 24 Westgarth Terrace, Darlington	End Date 04/09/2026
Description Cleaning	Indefinite
Start Date 05/09/2025	Exclude From Man Fee
Charge Period Monthly	VAT Type Exempt
Transaction Type Landlord Service Charge Invoi	Total £ 0.00
Amount £ 0.00	
Net £ 0.00	

September 2025

31	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30	1	2	3	4
5	6	7	8	9	10	11

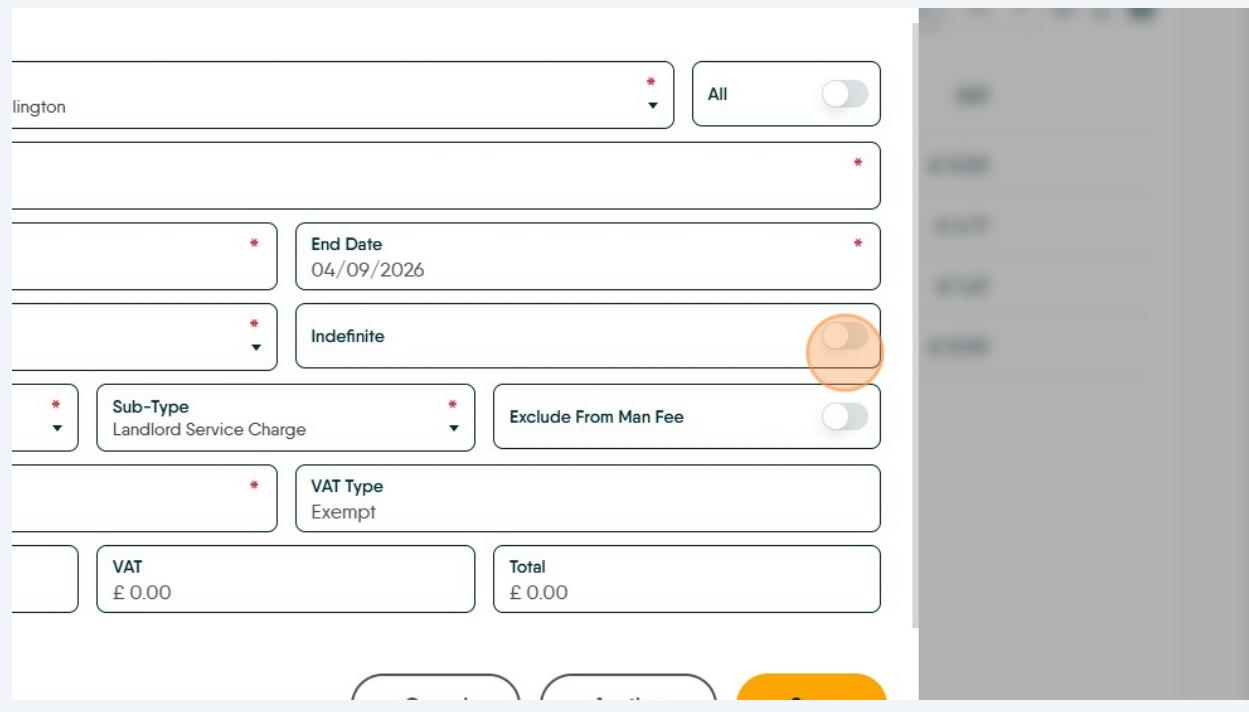
25 Select the **charge period**. For example click "Monthly"

**Add Service Charge**

Tenant • Ella Petch - 24 Westgarth Terrace, Darlington	End Date 04/09/2026
Description Cleaning	Indefinite
Start Date 05/09/2025	Exclude From Man Fee
Charge Period Monthly	VAT Type Exempt
Monthly	Total £ 0.00
Quarterly	
Half Yearly	
Yearly	

Cancel Another Save

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



lington

All

End Date  
04/09/2026

Indefinite

Sub-Type  
Landlord Service Charge

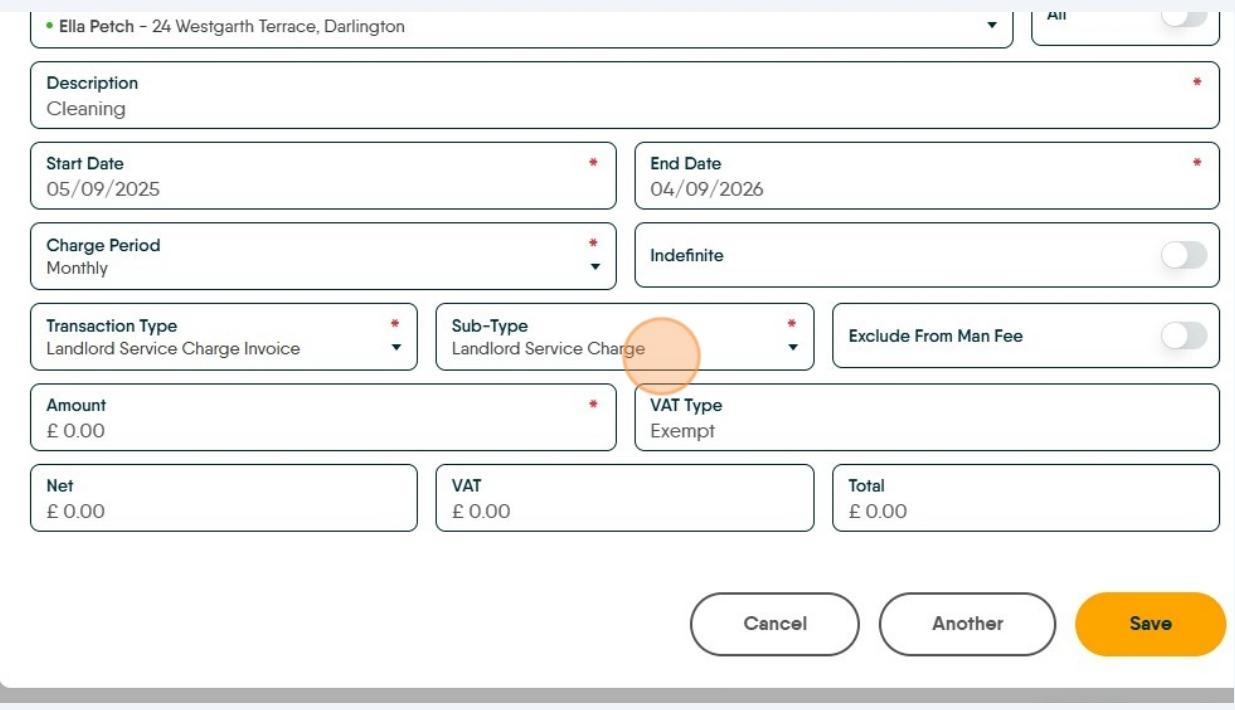
Exclude From Man Fee

VAT Type  
Exempt

VAT  
£ 0.00

Total  
£ 0.00

27 Click "**Landlord Service Charge**"



Ella Patch - 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

Net  
£ 0.00

VAT  
£ 0.00

Total  
£ 0.00

Cancel

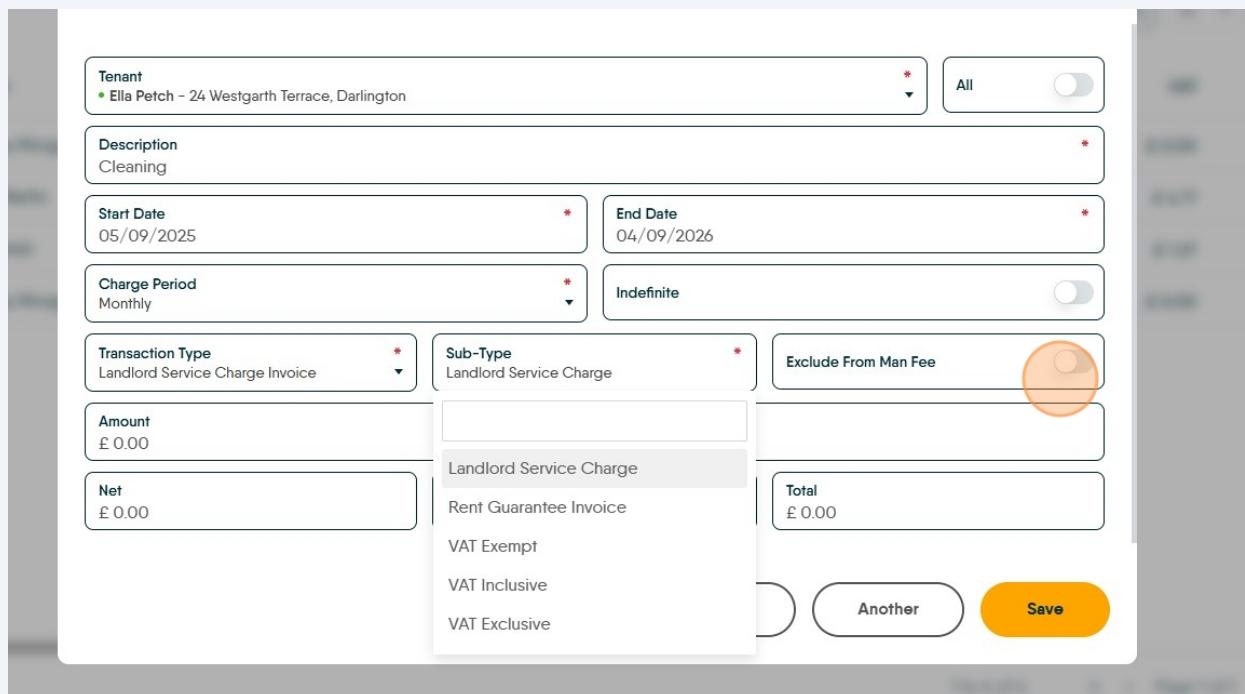
Another

Save

28

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

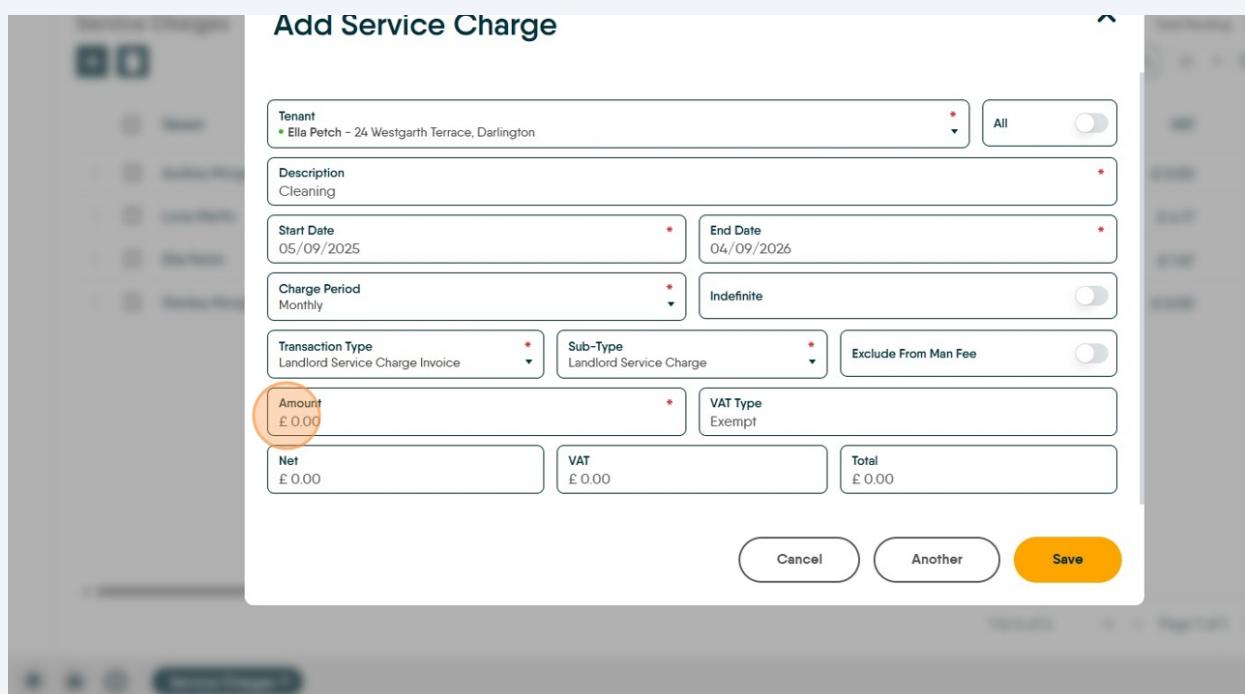
To exclude the transaction from being charged a "**Management Fee**" click here.



The screenshot shows the 'Add Service Charge' form. The 'Exclude From Man Fee' toggle switch is highlighted with a red oval. Other fields visible include Tenant (Ella Petch - 24 Westgarth Terrace, Darlington), Description (Cleaning), Start Date (05/09/2025), End Date (04/09/2026), Charge Period (Monthly), Transaction Type (Landlord Service Charge Invoice), Sub-Type (Landlord Service Charge), Amount (£ 0.00), Net (£ 0.00), Total (£ 0.00), VAT Type (Exempt), and buttons for Save, Another, and Cancel.

29

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



The screenshot shows the 'Add Service Charge' form. The 'Amount' field is highlighted with a red oval. Other fields visible include Tenant (Ella Petch - 24 Westgarth Terrace, Darlington), Description (Cleaning), Start Date (05/09/2025), End Date (04/09/2026), Charge Period (Monthly), Transaction Type (Landlord Service Charge Invoice), Sub-Type (Landlord Service Charge), Exclude From Man Fee (unchecked), Amount (£ 0.00), Net (£ 0.00), VAT (£ 0.00), Total (£ 0.00), VAT Type (Exempt), and buttons for Save, Another, and Cancel.

30 Click the "VAT Type" field.

**Add Service Charge**

Tenant • Ella Petch - 24 Westgarth Terrace, Darlington	All <input type="checkbox"/>	
Description Cleaning	*	
Start Date 05/09/2025	End Date 04/09/2026	
Charge Period Monthly	Indefinite <input type="checkbox"/>	
Transaction Type Landlord Service Charge Invoice	Sub-Type Landlord Service Charge	Exclude From Man Fee <input type="checkbox"/>
Amount £ 20	VAT Type Exempt	
Net £ 20.00	VAT £ 0.00	Total £ 20.00
<b>Save</b>		

31 The VAT breakdown will show here.

Description Cleaning	*	
Start Date 05/09/2025	End Date 04/09/2026	
Charge Period Monthly	Indefinite <input type="checkbox"/>	
Transaction Type Landlord Service Charge Invoice	Sub-Type Landlord Service Charge	Exclude From Man Fee <input type="checkbox"/>
Amount £ 20.00	VAT Type Exempt	
Net £ 20.00	VAT £ 0.00	Total £ 20.00
<b>Save</b>		

32 Click "Save"

**Add Service Charge**

Tenant • Ella Petch - 24 Westgarth Terrace, Darlington	All <input type="checkbox"/>	
Description Clearing	*	
Start Date 05/09/2025	End Date 04/09/2026	
Charge Period Monthly	Indefinite <input type="checkbox"/>	
Transaction Type Landlord Service Charge Invoice	Sub-Type Landlord Service Charge	Exclude From Man Fee <input type="checkbox"/>
Amount £ 20.00	VAT Type Exempt	
Net £ 20.00	VAT £ 0.00	Total £ 20.00
<b>Cancel</b> <b>Another</b> <b>Save</b>		

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