

Adding Service Charges for Tenants



This guide provides a straightforward process for adding service charges for tenants, ensuring clarity on whether the charge goes to the agent or landlord.

It simplifies the management of tenant accounts by allowing users to create specific or blanket charges, set durations, and define amounts efficiently. By following these steps, property managers can streamline their billing processes and maintain accurate financial records, making it an essential resource for effective property management.

- 1 Navigate to <https://crm.iamproperty.com/MyDay>

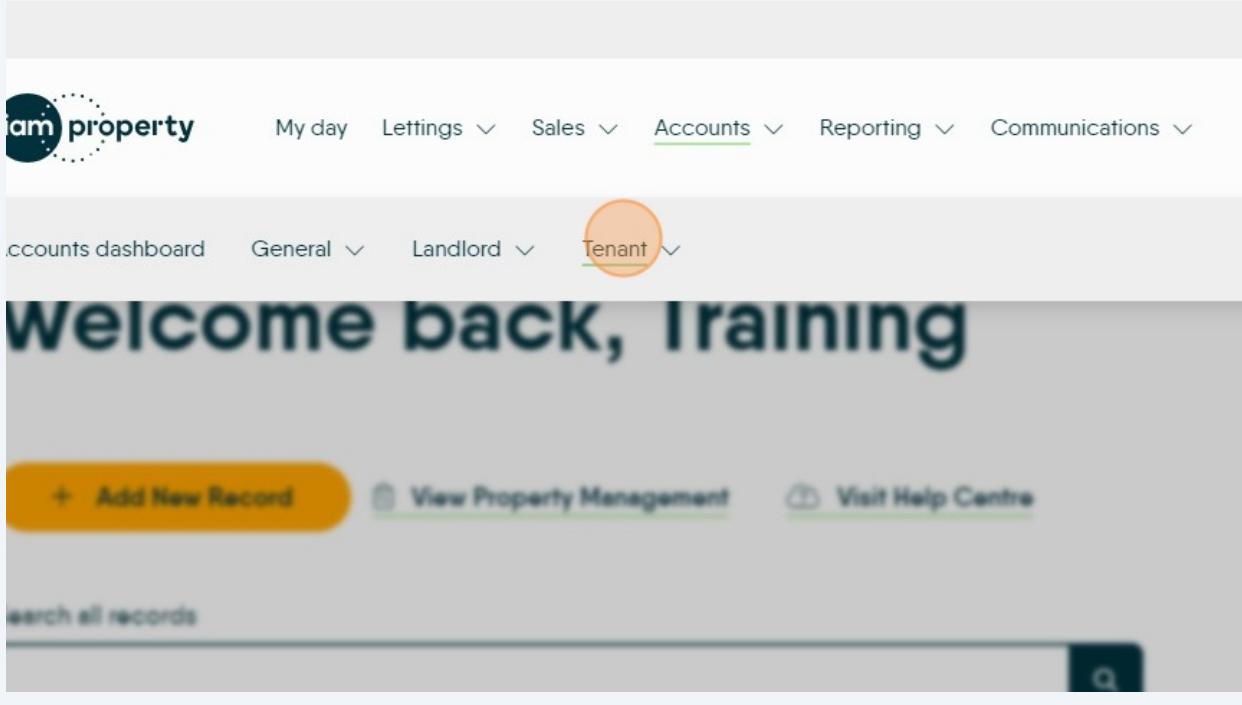


Tip! Depending on the option you select, this process can either be a 'Service Charge' which will go to the Agent or a 'Landlord Service charge' which will be paid to the property/landlord.

- 2 Click **"Accounts"**

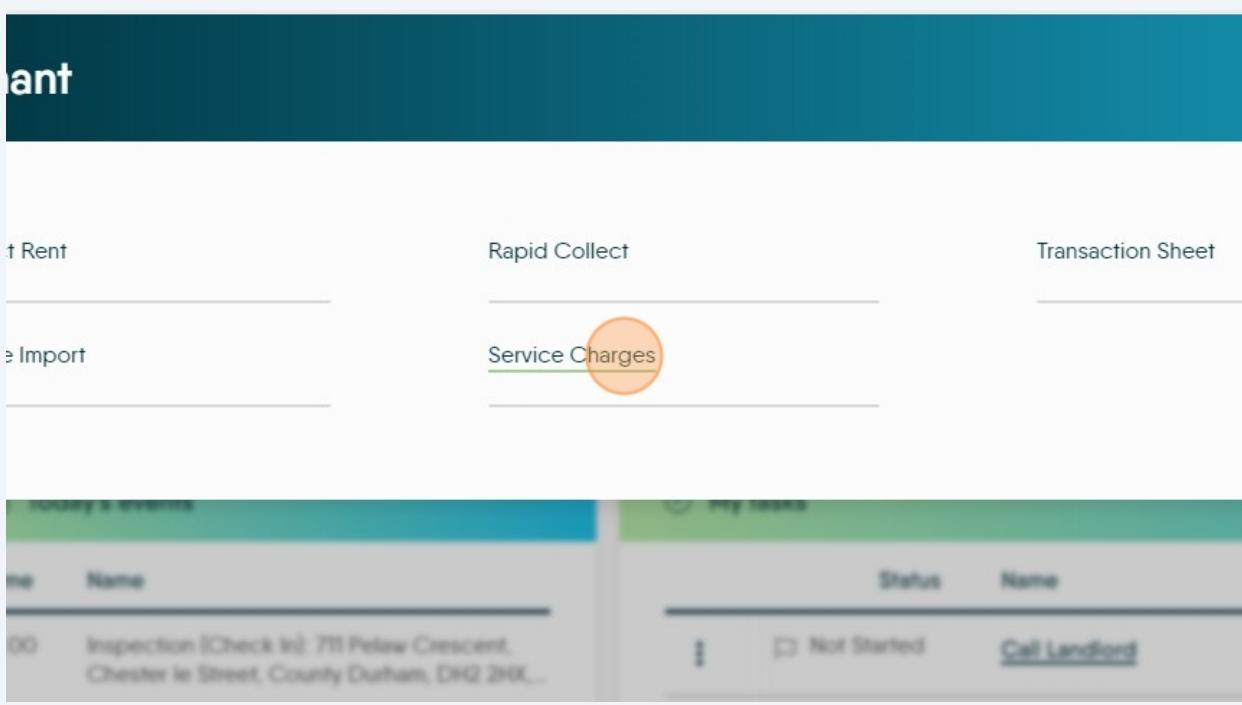
A screenshot of the iam property software interface. The top navigation bar includes links for 'My day', 'Lettings', 'Sales', 'Accounts' (which is highlighted with a yellow oval), 'Reporting', and 'Communications'. Below the navigation is a large, bold, dark blue header with the text 'Welcome back, Training'. At the bottom of the screen, there are three buttons: 'Add New Record' (yellow background), 'View Property Management' (green background), and 'Visit Help Centre' (light blue background). A search bar with a magnifying glass icon is located at the bottom right.

3 Click "Tenant"



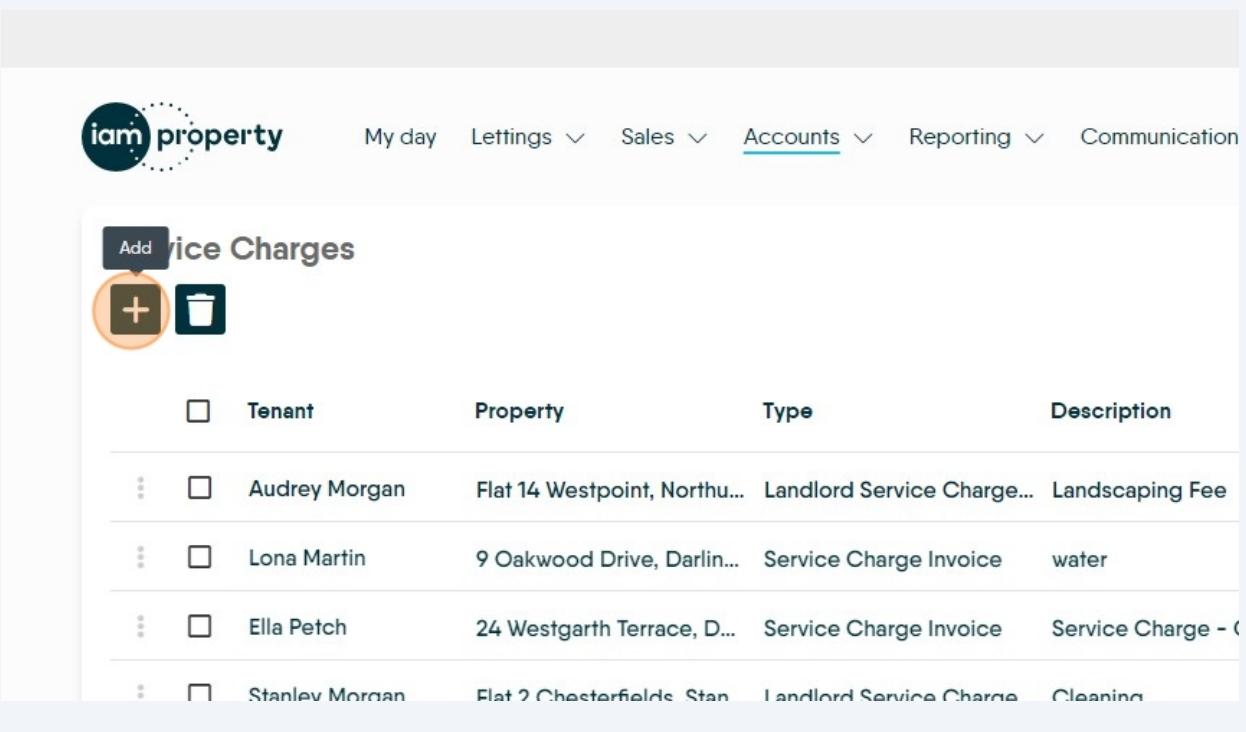
The screenshot shows the i.am property software interface. At the top, there is a navigation bar with links: My day, Lettings, Sales, Accounts (underlined), Reporting, and Communications. Below the navigation bar, there is a secondary navigation bar with links: accounts dashboard, General, Landlord, and Tenant (underlined). The main title "Welcome back, Training" is displayed prominently. Below the title, there are three buttons: "+ Add New Record", "View Property Management", and "Visit Help Centre". A search bar with the placeholder "Search all records" and a magnifying glass icon is located at the bottom. The overall interface is clean and modern, with a light grey background and blue/white text.

4 Click "Service Charges"



The screenshot shows the i.am property software interface. The top navigation bar is visible, showing "Tenant" as the selected category. Below the navigation bar, there are several buttons and links: "Rent", "Rapid Collect", "Transaction Sheet", "Import", and "Service Charges" (underlined and highlighted with an orange circle). The "Service Charges" link is the target of the fourth step. At the bottom of the screen, there are two tables: "My Tasks" and "My Reminders". The "My Tasks" table has columns for "Status" and "Name", with one task listed: "Not Started" and "Call Landlord". The "My Reminders" table has columns for "Name" and "Status", with one reminder listed: "Call Landlord". The overall interface is clean and modern, with a dark header and light body.

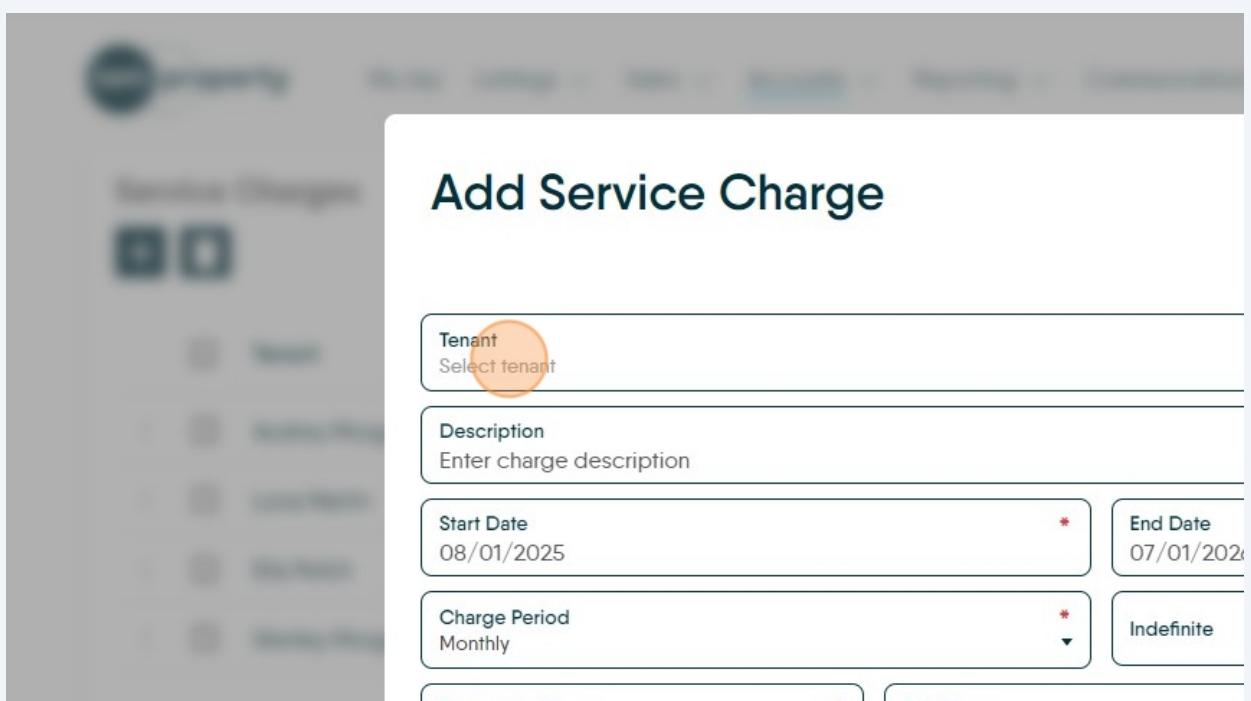
5 Click here to create the Service Charge.



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 in blue, indicating it's the active section), 'Reporting', and 'Communication'. Below this, a sub-menu titled 'Add Service Charges' is displayed, featuring a large orange 'Add' button with a plus sign and a small trash can icon. The main table lists service charges with columns for 'Tenant', 'Property', 'Type', and 'Description'. The data in the table is as follows:

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

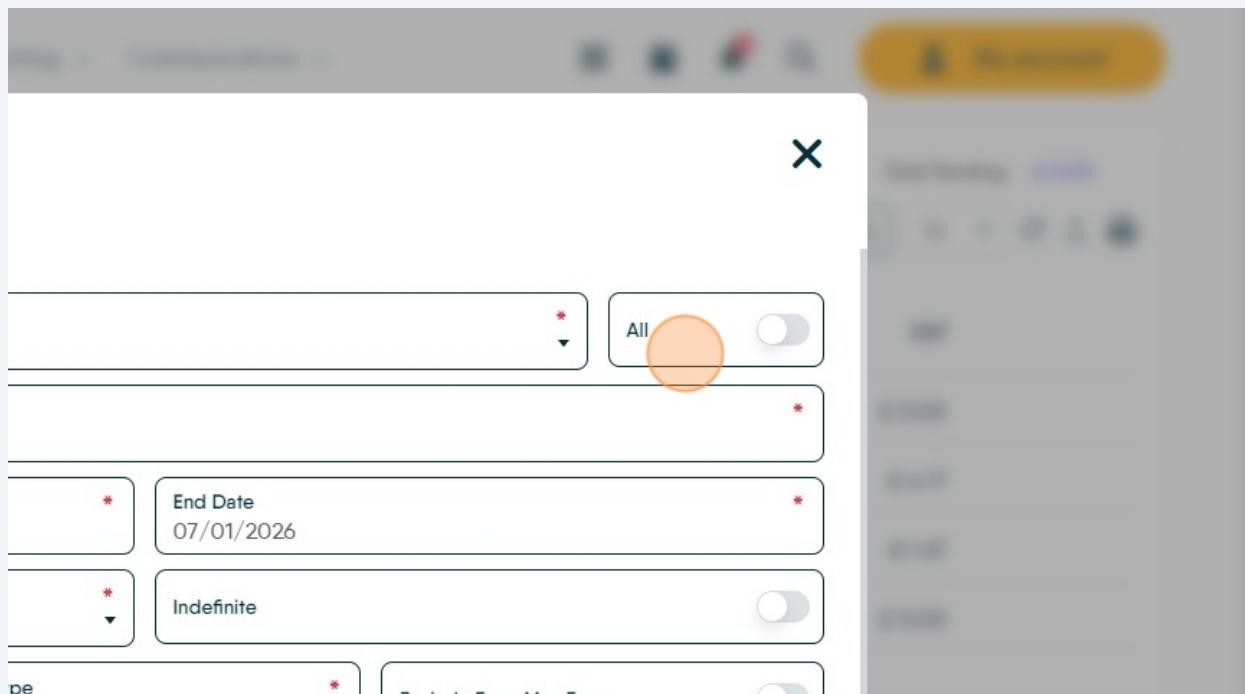
6 Click "**Select tenant**" and search for the specific tenant you are charging or,



The screenshot shows a modal dialog box titled 'Add Service Charge'. The dialog has several input fields: 'Tenant' (with a placeholder 'Select tenant' and a small orange circle highlighting the field), 'Description' (with a placeholder 'Enter charge description'), 'Start Date' (set to '08/01/2025'), 'End Date' (set to '07/01/2026'), 'Charge Period' (set to 'Monthly'), and a dropdown menu for 'Indefinite'.

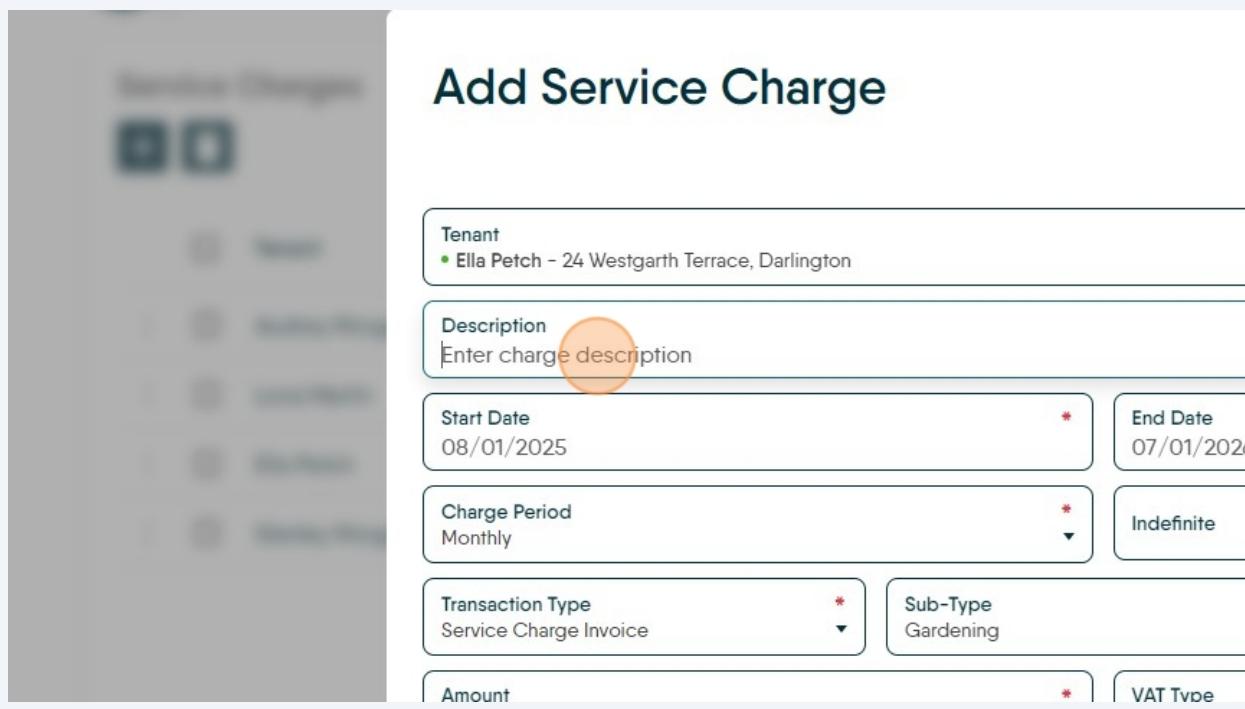
7

Click here to make the charge across all tenants rather than just one specific tenant.

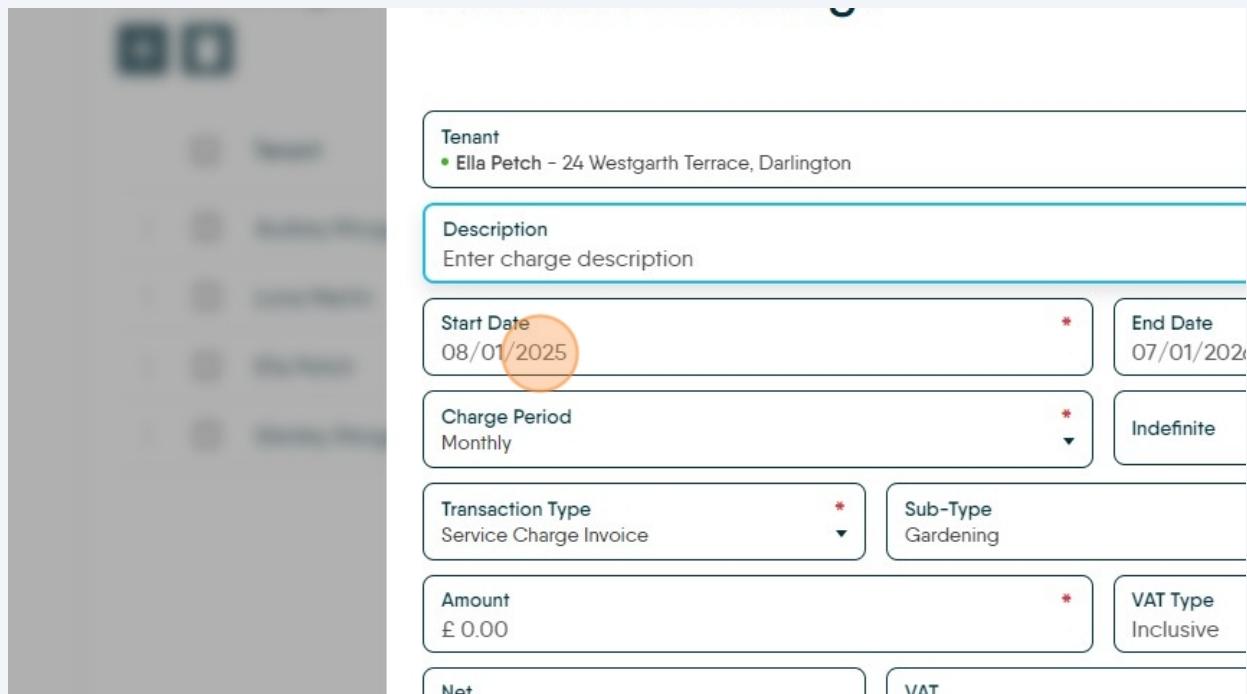


8

Click the "**Description**" field and add a clear description of the charge.



9 Click the **"Start Date"** field and set the start date for the charge.



Tenant
• Ella Petch - 24 Westgarth Terrace, Darlington

Description
Enter charge description

Start Date *
08/01/2025

End Date
07/01/2026

Charge Period *
Monthly

Indefinite

Transaction Type *
Service Charge Invoice

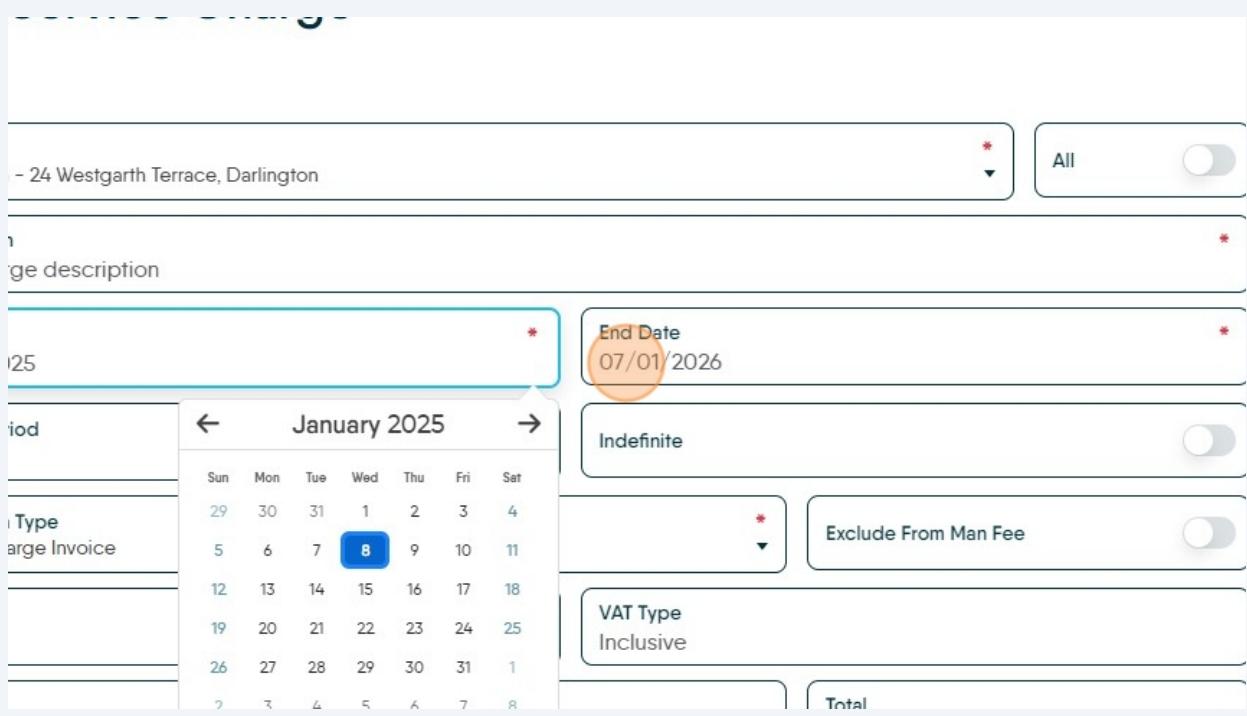
Sub-Type
Gardening

Amount *
£ 0.00

VAT Type
Inclusive

Net VAT

10 Click the **"End Date"** field. If you are creating an 'indefinite' length charge then you don't need to set this date.



- 24 Westgarth Terrace, Darlington

ge description

25

End Date *
07/01/2026

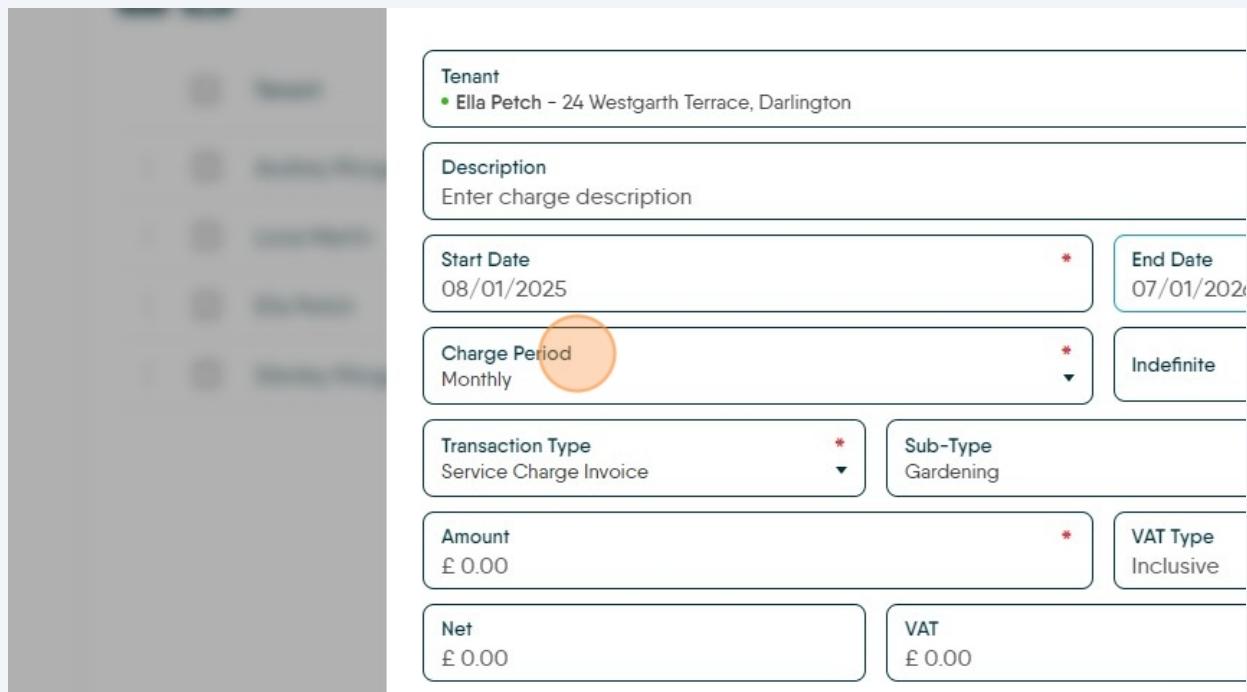
Indefinite

Exclude From Man Fee

VAT Type
Inclusive

Total

11 Click **"Charge Period"**



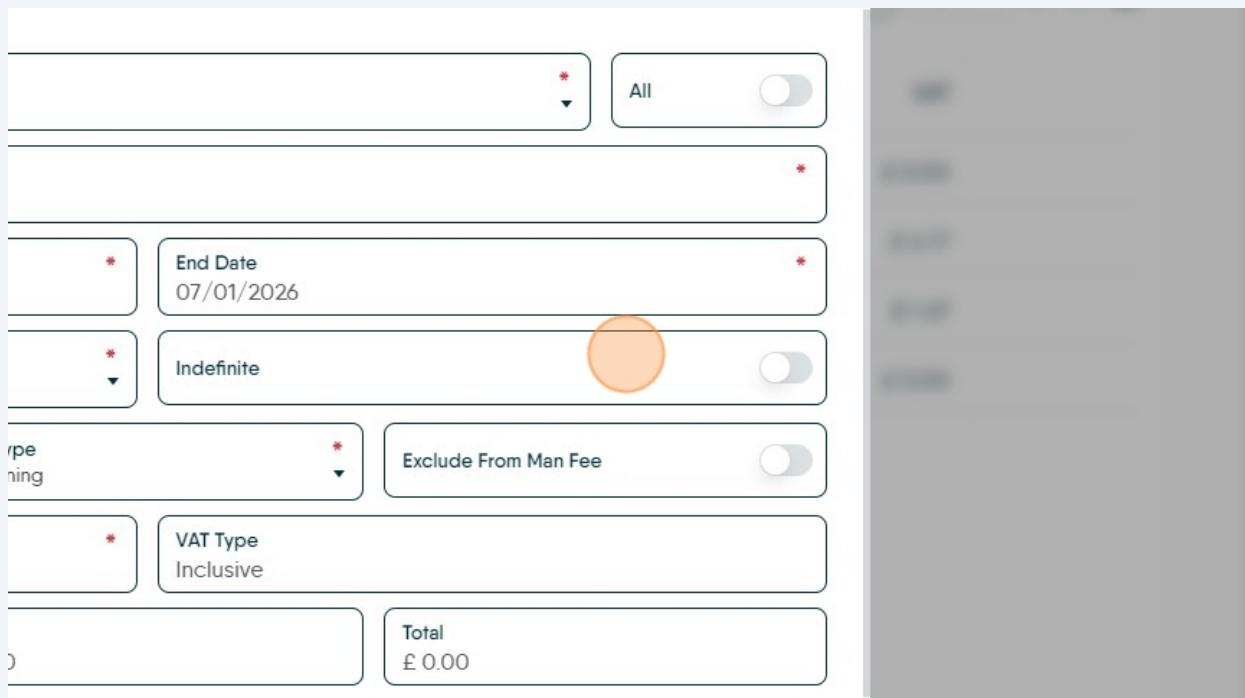
The screenshot shows a software interface for managing service charges. On the left, there is a blurred list of items. On the right, a form is displayed with the following fields:

- Tenant:** Ella Petch - 24 Westgarth Terrace, Darlington
- Description:** Enter charge description
- Start Date:** * 08/01/2025
- End Date:** 07/01/2025
- Charge Period:** * Monthly (highlighted with an orange circle)
- Sub-Type:** Indefinite
- Transaction Type:** * Service Charge Invoice
- Sub-Type:** Gardening
- Amount:** * £ 0.00
- VAT Type:** Inclusive
- Net:** £ 0.00
- VAT:** £ 0.00



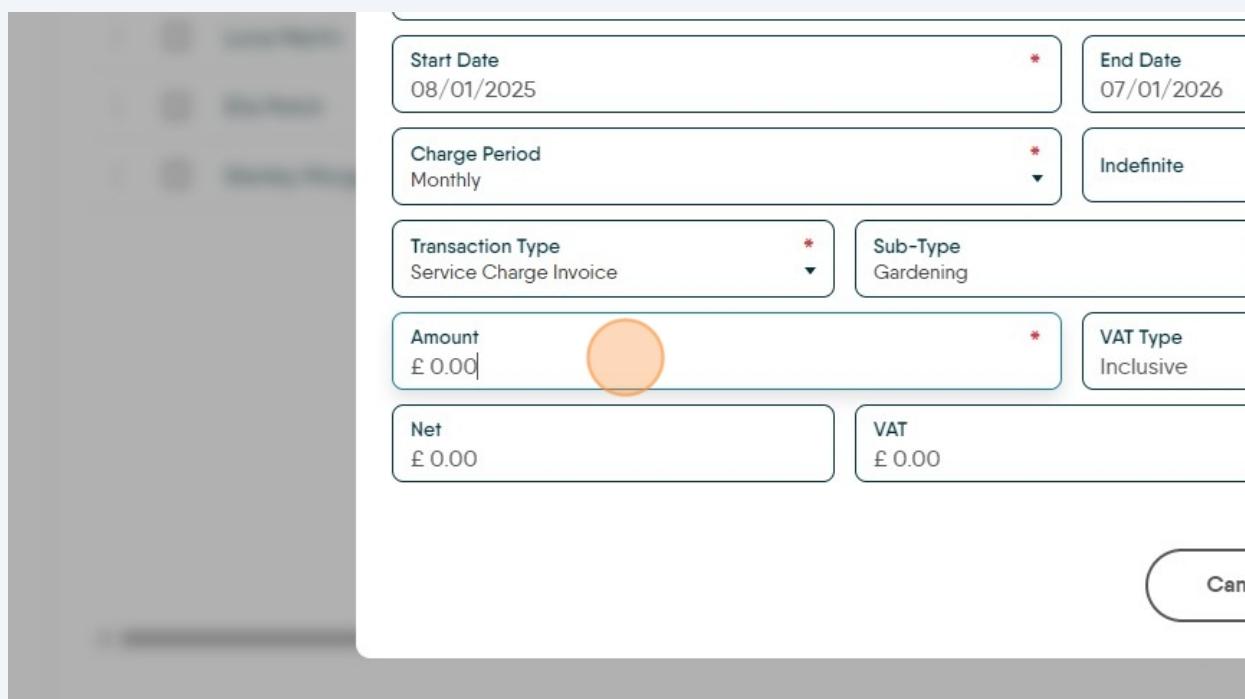
Alert! If you set the Transaction type to 'Landlord Service Charge' you can use this process to charge non rent payments to the Tenant and pay the landlord. This process creates a debit to the Tenant ledger and a credit to the property ledger, which is payable to the Landlord.

12 Click here to make the charge run for an indefinite period.



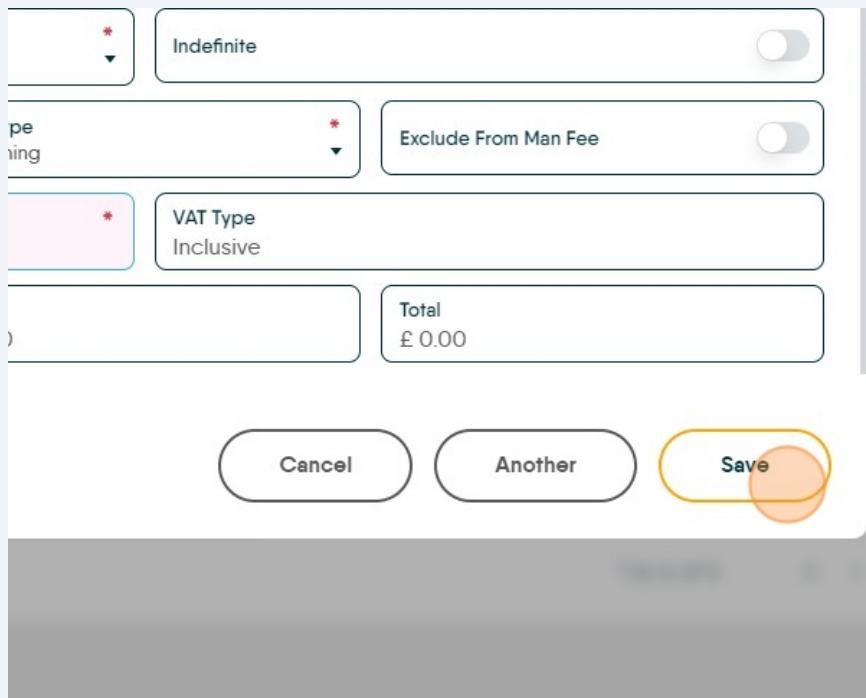
The screenshot shows a list of charges. The last charge in the list has an 'Indefinite' toggle switch highlighted with an orange circle. Other fields visible include 'End Date' (07/01/2026), 'Type' (Service Charge), 'VAT Type' (Inclusive), and 'Total' (£ 0.00).

13 Click the "**Amount**" field. Add the amount for the charge



The screenshot shows a charge creation form. The 'Amount' field is highlighted with an orange circle. Other fields include 'Start Date' (08/01/2025), 'End Date' (07/01/2026), 'Charge Period' (Monthly), 'Transaction Type' (Service Charge Invoice), 'Sub-Type' (Gardening), 'VAT Type' (Inclusive), 'Net' (£ 0.00), and 'VAT' (£ 0.00). A 'Cancel' button is visible in the bottom right corner.

14 Click "Save"



This charge will be charged to selected/all Tenants automatically based on the period that you set.