


# Adding Service Charges for Tenants



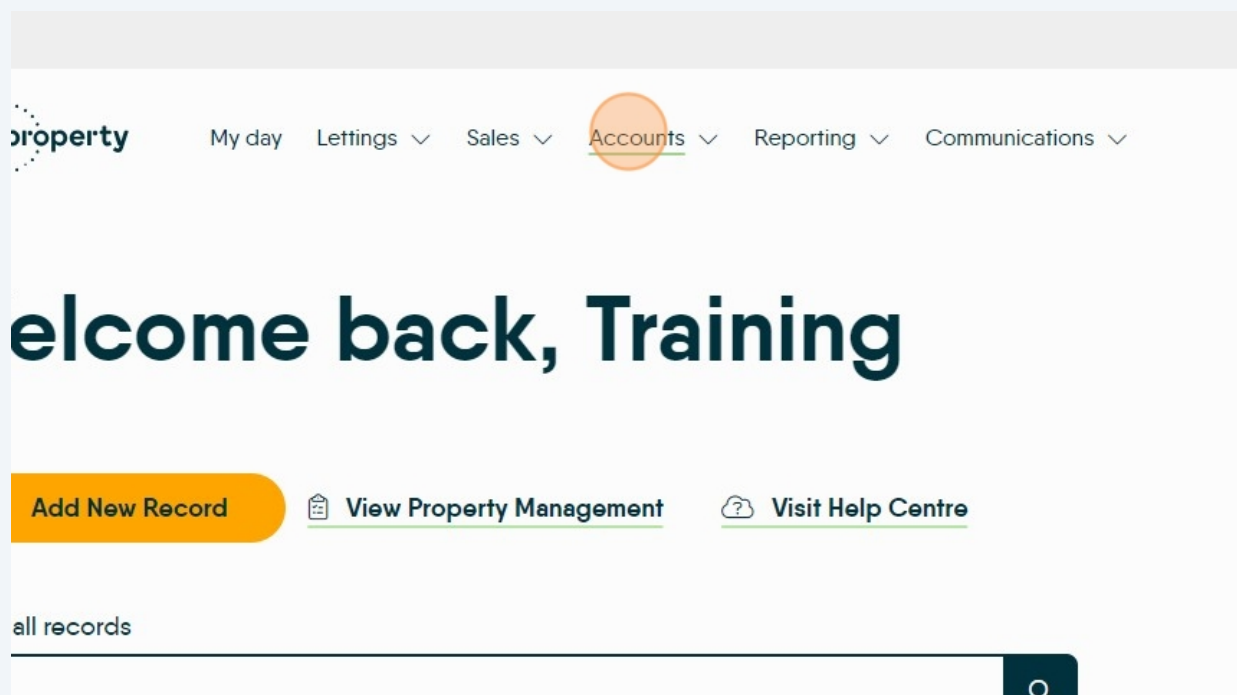
This guide provides a straightforward process for adding service charges for tenants, ensuring clarity on whether the charge goes to the agent or landlord.

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.

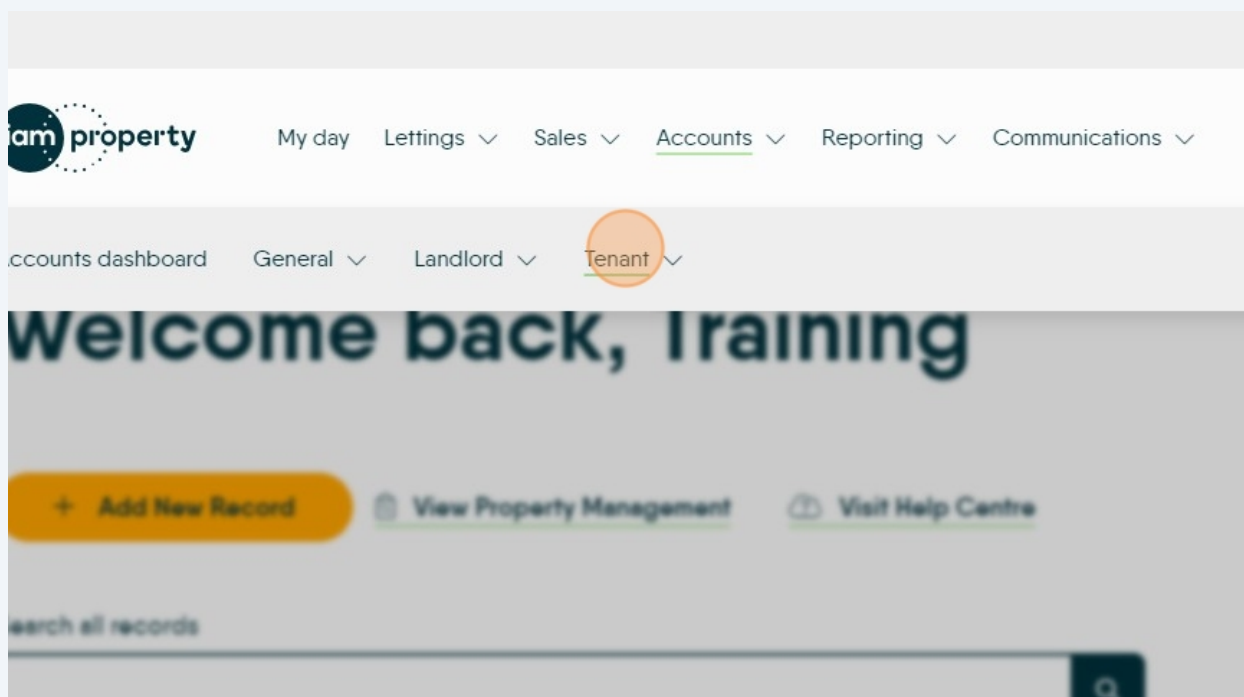
1 Navigate to <https://crm.iamproperty.com/MyDay>

 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.

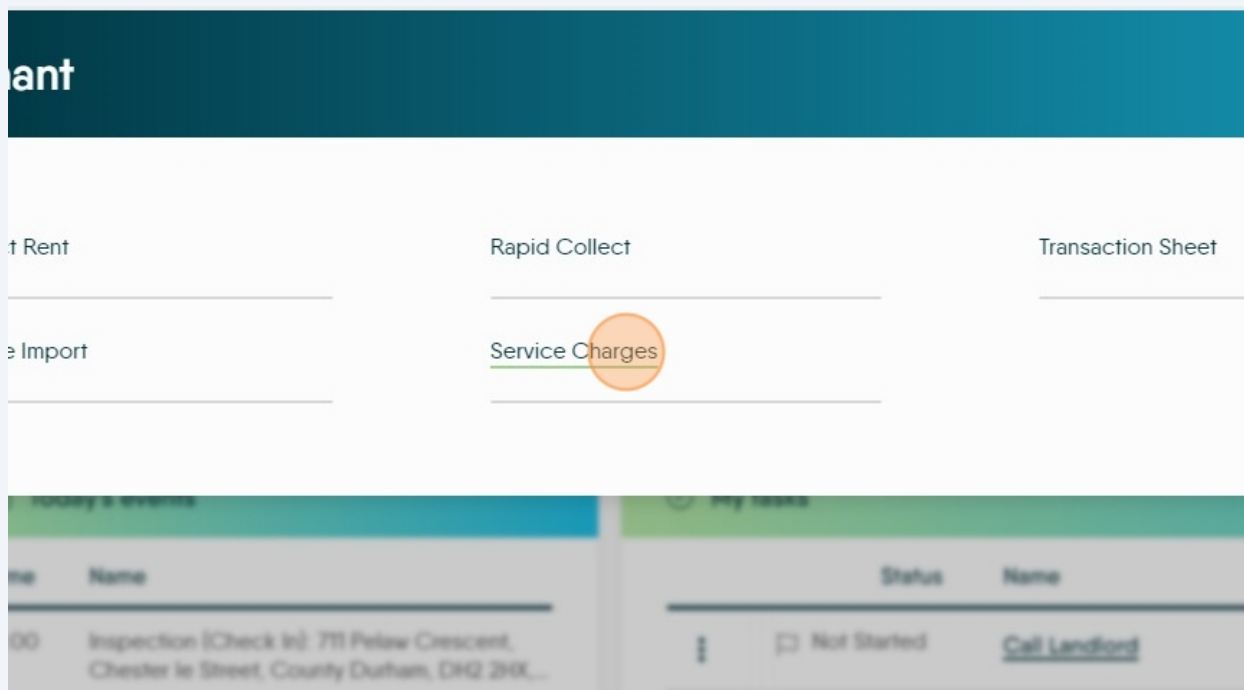
2 Click "**Accounts**"



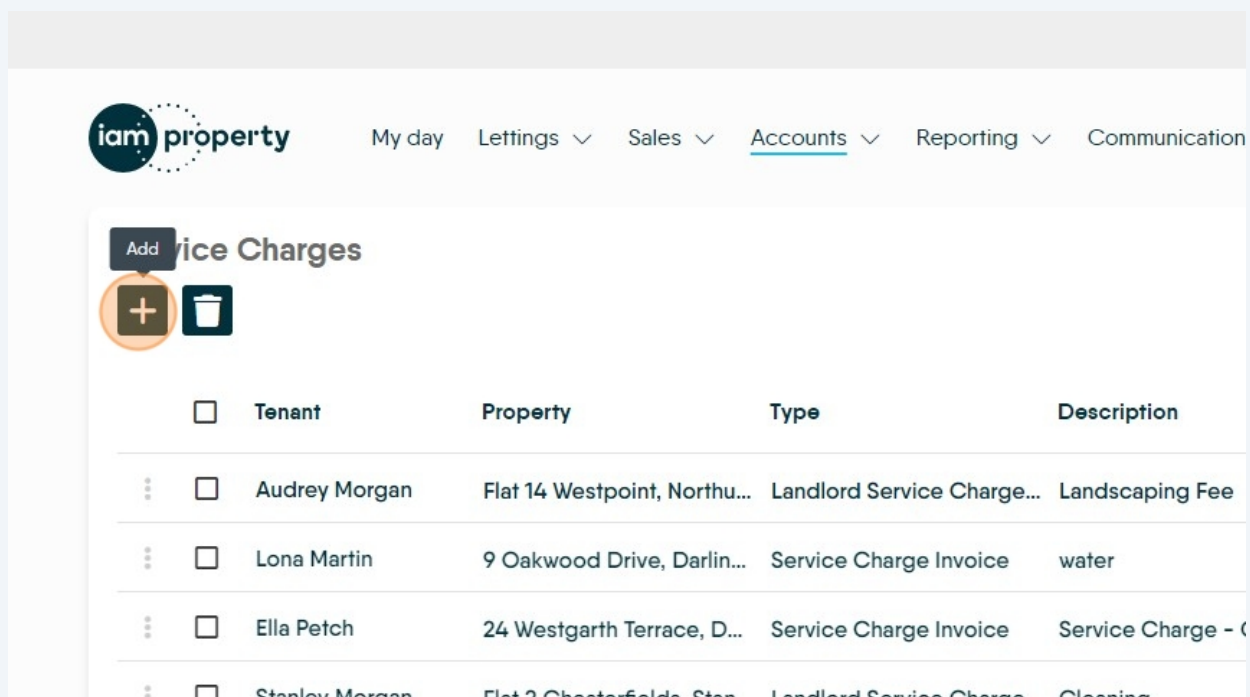
3 Click **"Tenant"**



4 Click **"Service Charges"**



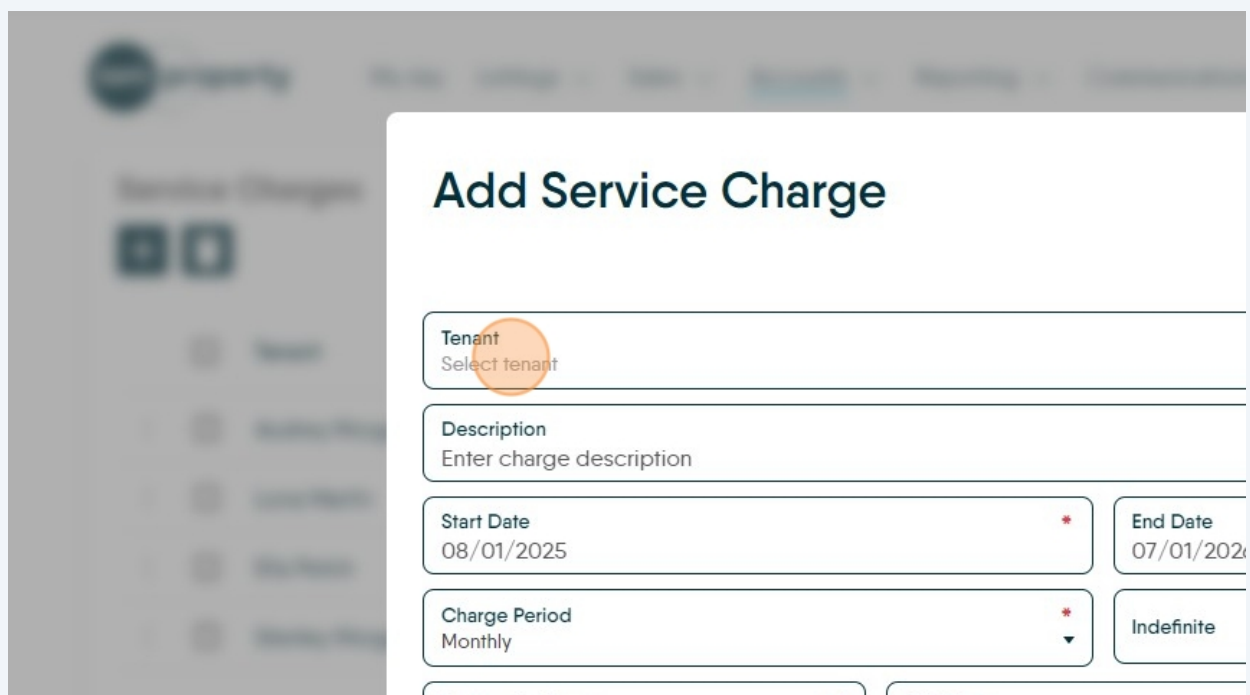
- 5 Click here to create the Service Charge.



The screenshot shows the 'iam property' dashboard with the 'Accounts' menu selected. The 'Service Charges' section is highlighted, featuring an 'Add' button with a plus icon and a trash 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           |

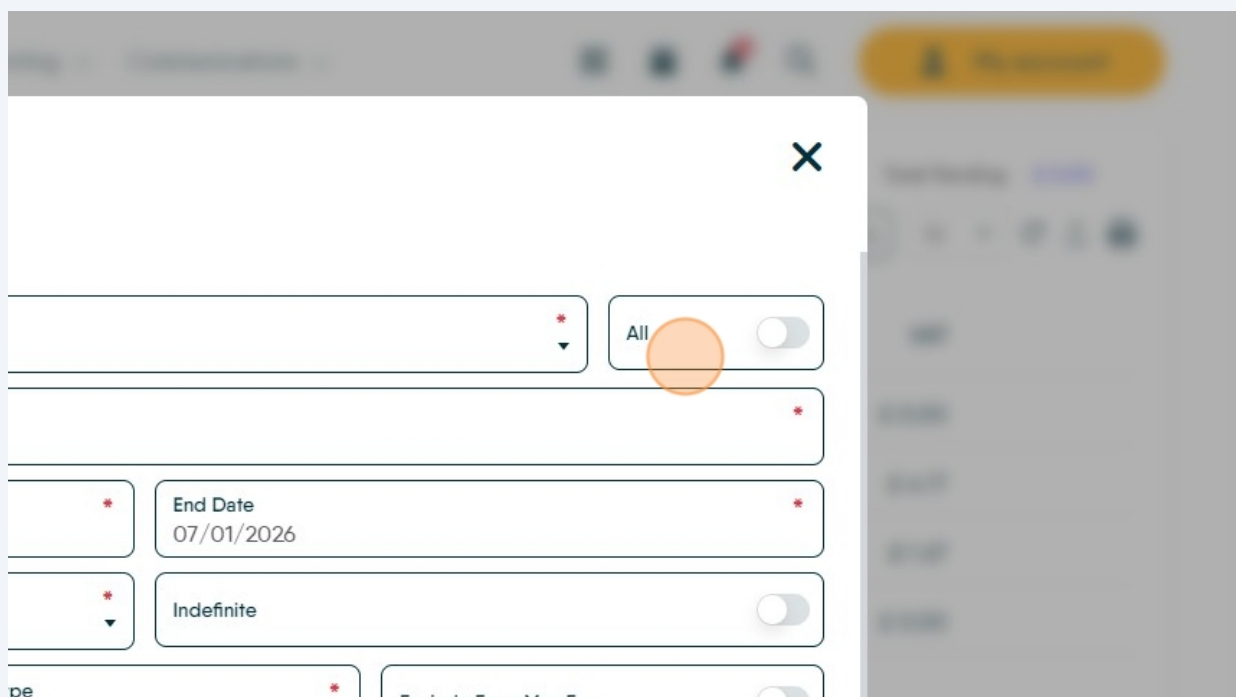
- 6 Click "Select tenant" and search for the specific tenant you are charging or,



The screenshot shows the 'Add Service Charge' form. The 'Tenant' field is highlighted with an orange circle and contains the text 'Select tenant'. Other fields include 'Description' (Enter charge description), 'Start Date' (08/01/2025), 'End Date' (07/01/2025), 'Charge Period' (Monthly), and 'Indefinite'.

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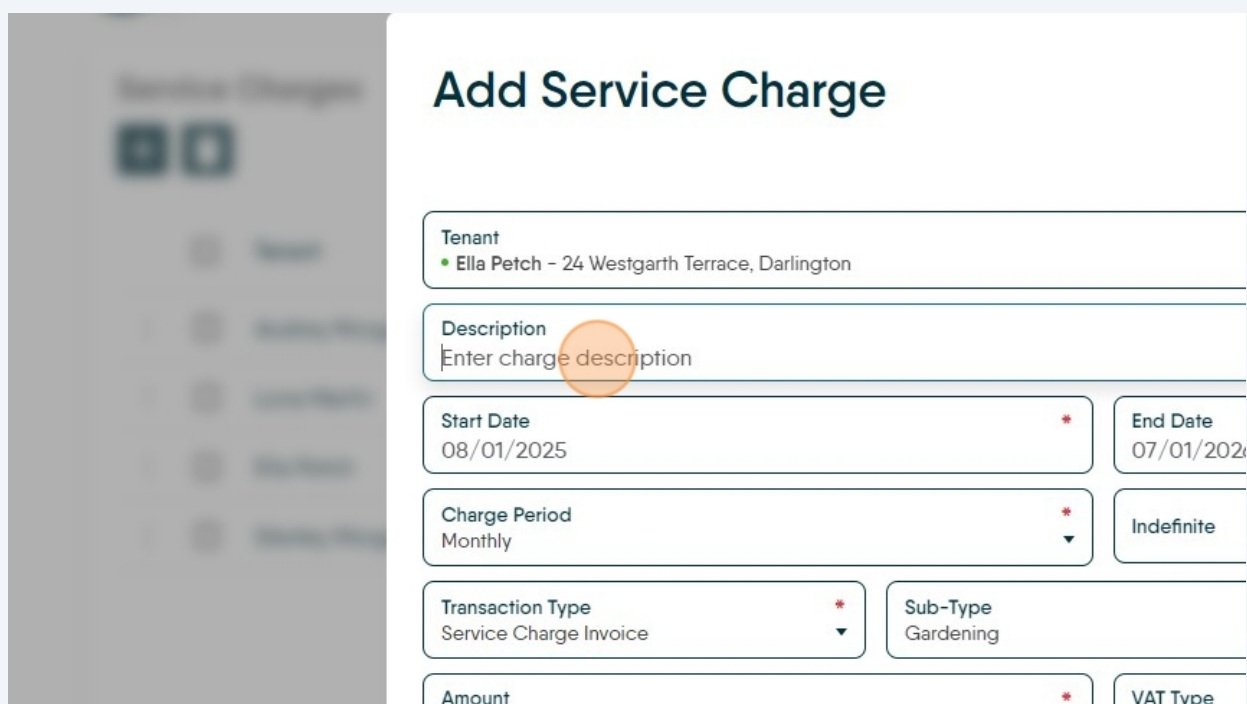
Click here to make the charge across all tenants rather than just one specific tenant.



A screenshot of a web application form. At the top right is a close button (X). Below it is a dropdown menu with a red asterisk. To its right is a toggle switch labeled 'All', which is highlighted with an orange circle. Below these are two more input fields, each with a red asterisk. The first of these contains 'End Date' and '07/01/2026'. The second contains 'Indefinite' and a toggle switch. At the bottom, there are two more input fields, one with 'pe' and a red asterisk, and another with 'Exclude From Max Fee' and a toggle switch.

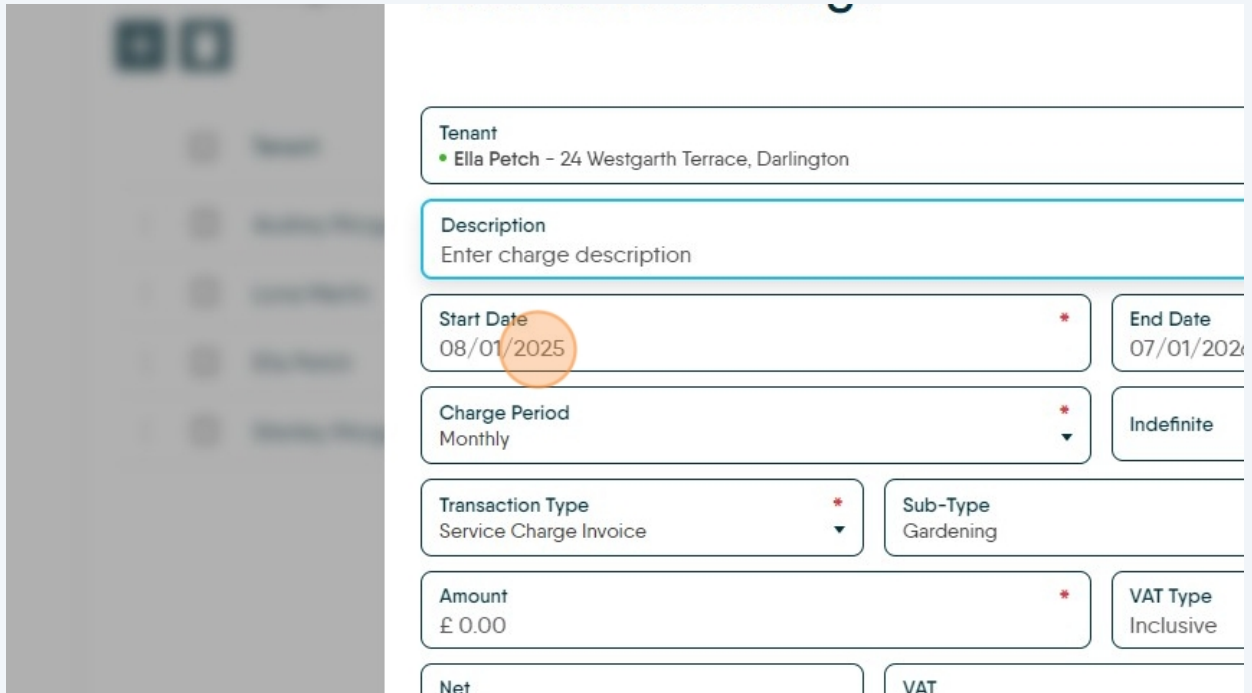
8

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



A screenshot of a web application form titled 'Add Service Charge'. The form contains several fields: 'Tenant' with a dropdown showing 'Ella Petch - 24 Westgarth Terrace, Darlington'; 'Description' with a placeholder 'Enter charge description' and an orange circle highlighting it; 'Start Date' with '08/01/2025' and a red asterisk; 'End Date' with '07/01/2026'; 'Charge Period' with 'Monthly' and a red asterisk; 'Indefinite' with a toggle switch; 'Transaction Type' with a dropdown showing 'Service Charge Invoice' and a red asterisk; 'Sub-Type' with 'Gardening'; 'Amount' with a red asterisk; and 'VAT Type'.

- 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

Transaction Type Service Charge Invoice

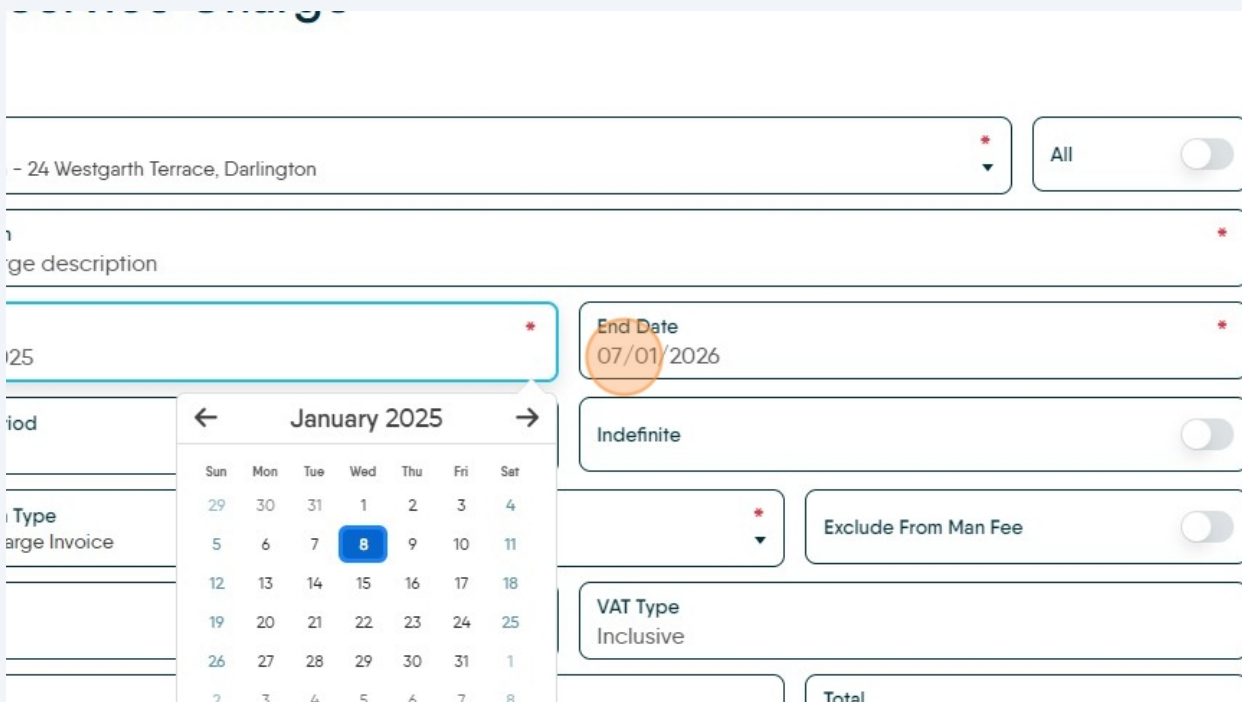
Sub-Type Gardening

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

All

Description  
Enter charge description

Start Date 08/01/2025

End Date 07/01/2026

Charge Period Monthly

Transaction Type Service Charge Invoice

Sub-Type Gardening

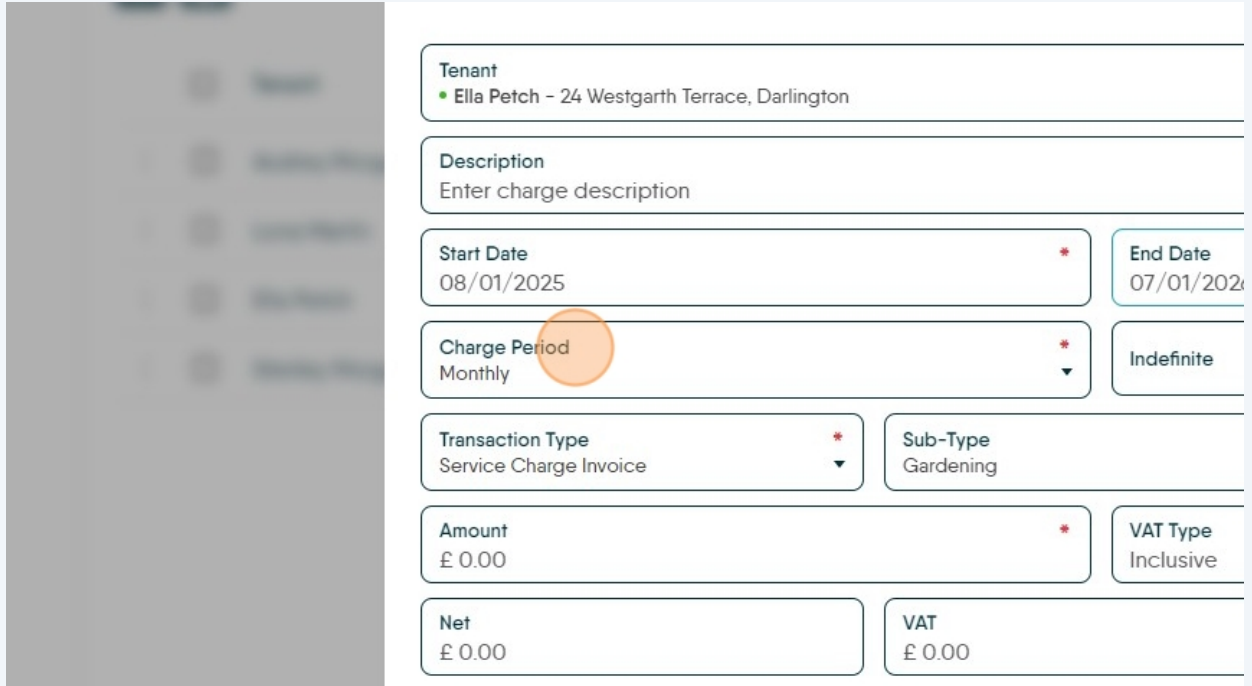
Amount £0.00

VAT Type Inclusive

Exclude From Man Fee

Total

## 11 Click "Charge Period"

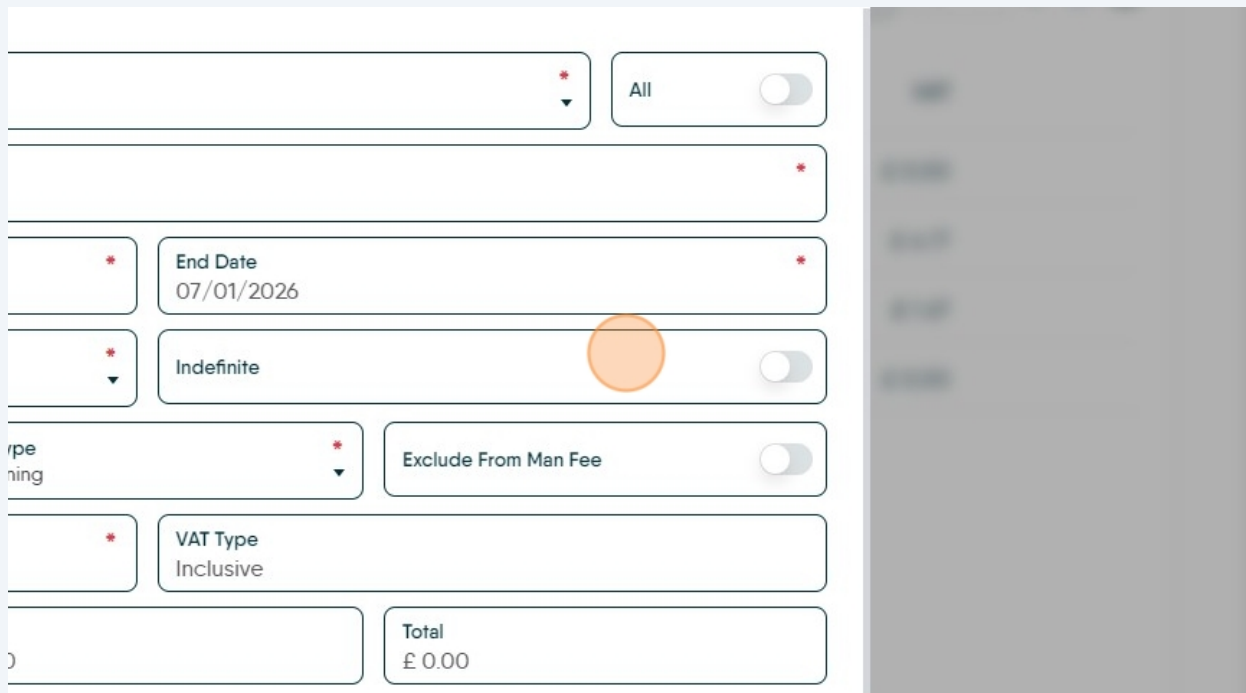


|  |                               |
|--|-------------------------------|
| <b>Tenant</b><br>• Ella Petch - 24 Westgarth Terrace, Darlington |                               |
| <b>Description</b><br>Enter charge description                   |                               |
| <b>Start Date</b><br>08/01/2025                                  | <b>End Date</b><br>07/01/2026 |
| <b>Charge Period</b><br>Monthly                                  | <b>Indefinite</b>             |
| <b>Transaction Type</b><br>Service Charge Invoice                | <b>Sub-Type</b><br>Gardening  |
| <b>Amount</b><br>£ 0.00  | <b>VAT Type</b><br>Inclusive  |
| <b>Net</b><br>£ 0.00   | <b>VAT</b><br>£ 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.

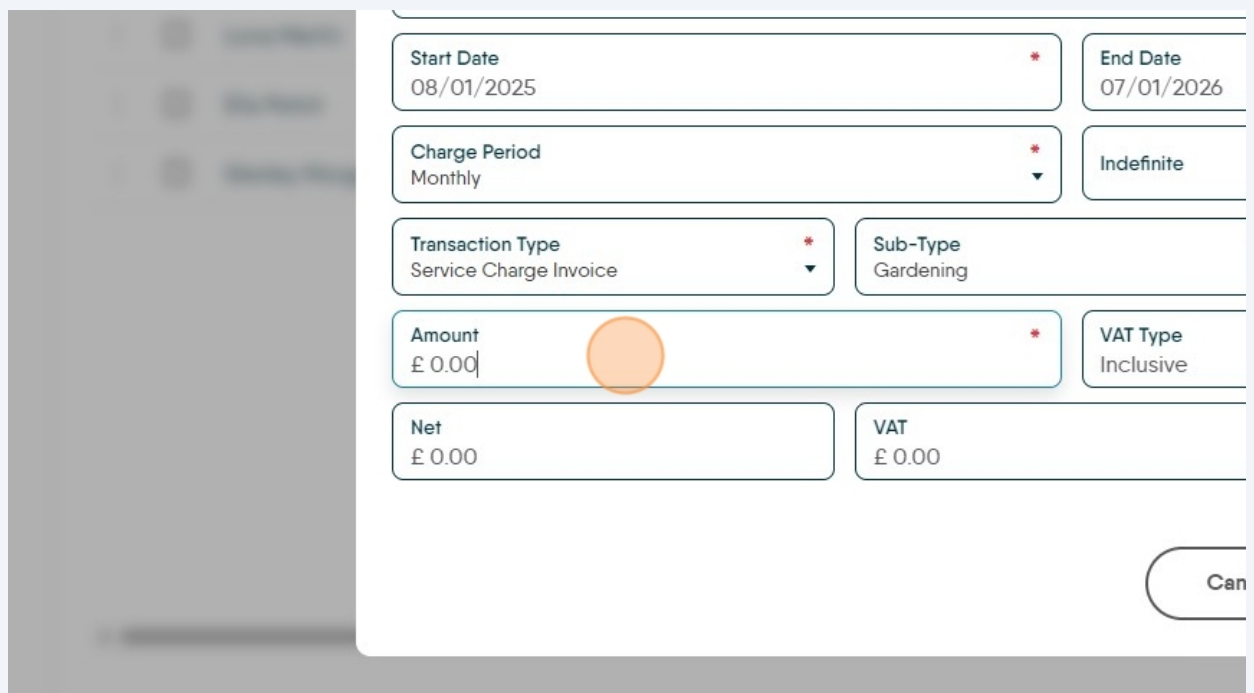
- 12 Click here to make the charge run for an indefinite period.



A screenshot of a web form with several input fields and toggle switches. An orange circle highlights the 'Indefinite' toggle switch, which is currently turned off. The form includes fields for 'End Date' (07/01/2026), 'Indefinite', 'Exclude From Man Fee', 'VAT Type' (Inclusive), and 'Total' (£ 0.00). There are also dropdown menus and a search bar at the top.

|            |                      |                          |
|------------|----------------------|--------------------------|
|            | All                  | <input type="checkbox"/> |
|            |                      |                          |
|            | End Date             | 07/01/2026               |
|            | Indefinite           | <input type="checkbox"/> |
| pe<br>ning | Exclude From Man Fee | <input type="checkbox"/> |
|            | VAT Type             | Inclusive                |
|            | Total                | £ 0.00                   |

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



A screenshot of a web form with several input fields. An orange circle highlights the 'Amount' field, which contains '£ 0.00'. The form includes fields for 'Start Date' (08/01/2025), 'End Date' (07/01/2026), 'Charge Period' (Monthly), 'Indefinite', 'Transaction Type' (Service Charge Invoice), 'Sub-Type' (Gardening), 'VAT Type' (Inclusive), 'Net' (£ 0.00), and 'VAT' (£ 0.00). There is a 'Can' button at the bottom right.

|                  |                        |            |            |
|------------------|------------------------|------------|------------|
| 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              | £ 0.00                 | VAT        | £ 0.00     |

Can

**14** Click **"Save"**

The screenshot shows a software interface with a form. The form has several fields and buttons. At the top, there is a dropdown menu with a red asterisk and a toggle switch labeled 'Indefinite'. Below this, there is a field labeled 'pe' and 'ing' with a red asterisk, and a toggle switch labeled 'Exclude From Man Fee'. Further down, there is a field labeled 'VAT Type' with a red asterisk and the text 'Inclusive'. Below that, there is a field labeled 'Total' with the text '£ 0.00'. At the bottom of the form, there are three buttons: 'Cancel', 'Another', and 'Save'. The 'Save' button is highlighted with an orange circle.

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