

# Accounts; Add a New Expense Category in CRM



This guide provides a straightforward process for adding a new expense category in the CRM, enhancing your ability to manage financial data effectively.

By following these steps, users can customize their expense tracking, ensuring better organization and reporting. This is particularly useful for businesses looking to streamline their accounting processes and improve financial oversight. Viewing this guide will empower users to tailor their CRM experience to better meet their specific needs.

1

There are 2 ways to access the Accounts setup. From the Configuration menu and from the Accounts Dashboard. Both ways are shown below.

Jump to [Accounts Dashboard](#)

2

Click "My Account"

The screenshot shows the CRM interface with the 'My Account' button circled in orange. The interface includes a top navigation bar with links for 'My day', 'Lettings', 'Sales', 'Accounts', 'Reporting', and 'Communications'. Below the navigation bar, there is a section titled 'Welcome back, Training' with buttons for 'Add New Record', 'View property management', and 'Visit help centre'. A search bar is also present. The main content area is divided into two sections: 'My events' and 'My tasks'. The 'My tasks' section contains a table with columns for Status, Name, Priority, Start date, and Due date.

| Status      | Name                     | Priority | Start date   | Due date     |
|-------------|--------------------------|----------|--------------|--------------|
| Not Started | Check                    | High     | 24/Sept/2025 | 24/Sept/2025 |
| Not Started | Contact Vendor re Survey | High     | 26/Sept/2025 | 26/Sept/2025 |
| Not Started | Call Audrey              | High     | 08/Oct/2025  | 08/Oct/2025  |

### 3 Click "Control centre"

The screenshot shows the CRM dashboard with the 'Control centre' option highlighted in the sidebar. The main content area displays a 'Welcome back, Training' message and a 'My tasks' table.

**Navigation Bar:** iamproperty CRM movebutler iamsold

**My account:** My account

**Control centre sidebar:**

- Active branches
- Account settings
- Control centre** (+)
- Help centre
- Log out

**Main Content:**

Welcome back, Training

[New Record](#) [View property management](#) [Visit help centre](#)

**My tasks:**

| Status      | Name                                     | Priority |
|-------------|------------------------------------------|----------|
| Not Started | <a href="#">Check</a>                    | High     |
| Not Started | <a href="#">Contact Vendor re Survey</a> | High     |
| Not Started | <a href="#">Call Audrey</a>              | High     |

### 4 Click "Configuration"

The screenshot shows the CRM dashboard with the 'Configuration' option highlighted in the sidebar. The main content area displays a 'Welcome back, Training' message and a 'My tasks' table.

**Navigation Bar:** iamproperty CRM movebutler iamsold

**My account:** My account

**Configuration sidebar:**

- Active branches
- Account settings
- Control centre
- Configuration** (-)
- Dashboard
- Users
- Branches
- Company
- Property Management Settings
- Help centre

**Main Content:**

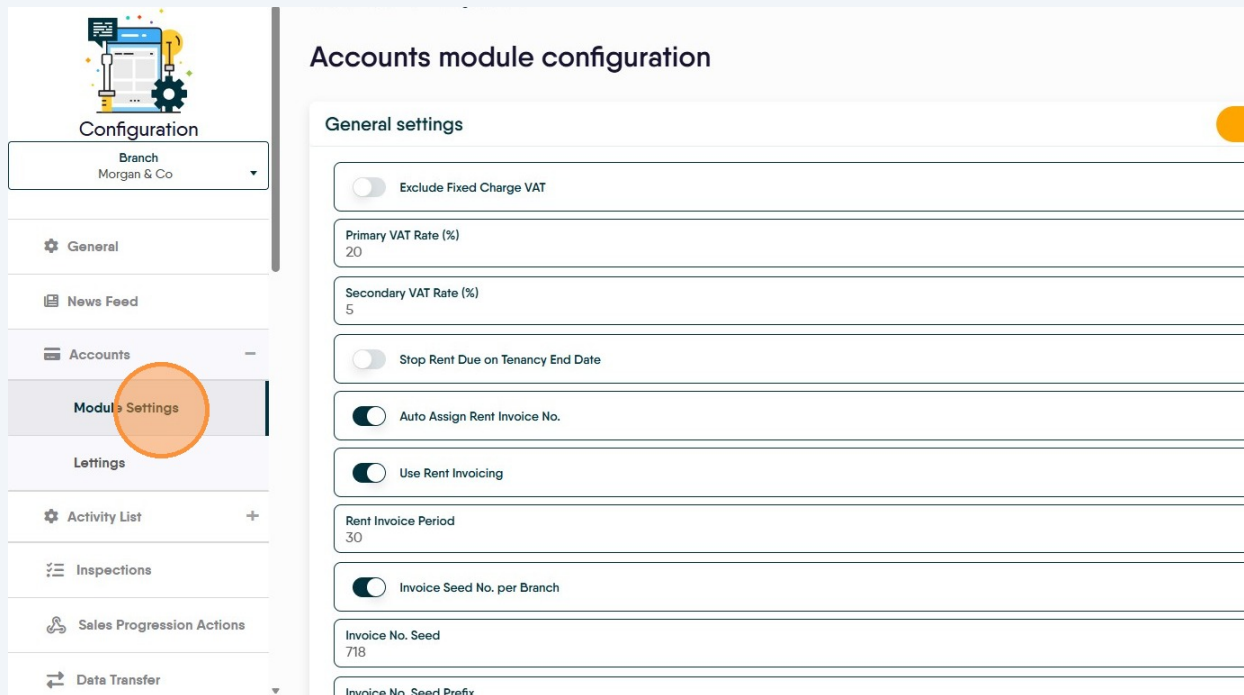
Welcome back, Training

[New Record](#) [View property management](#) [Visit help centre](#)

**My tasks:**

| Status      | Name                                     | Priority |
|-------------|------------------------------------------|----------|
| Not Started | <a href="#">Check</a>                    | High     |
| Not Started | <a href="#">Contact Vendor re Survey</a> | High     |
| Not Started | <a href="#">Call Audrey</a>              | High     |
| Not Started | <a href="#">test</a>                     | High     |
| Not Started | <a href="#">Visit</a>                    | High     |

- 5 Once in the 'Configuration' menu click "**Accounts**" then "**Module settings**"



**Configuration**  
Branch  
Morgan & Co

- General
- News Feed
- Accounts
- Module Settings**
- Lettings
- Activity List
- Inspections
- Sales Progression Actions
- Data Transfer

### Accounts module configuration

#### General settings

- ☐ Exclude Fixed Charge VAT
- Primary VAT Rate (%)  
20
- Secondary VAT Rate (%)  
5
- ☐ Stop Rent Due on Tenancy End Date
- ☒ Auto Assign Rent Invoice No.
- ☒ Use Rent Invoicing
- Rent Invoice Period  
30
- ☒ Invoice Seed No. per Branch
- Invoice No. Seed  
718
- Invoice No. Seed Prefix

- 6 From the Accounts Dashboard

- 7 Click the 'Cog' icon in the bottom left corner.

**Turvey & Co**  
24-52-19 24521960

|                   |              |              |              |
|-------------------|--------------|--------------|--------------|
| Balance           | £ 20, 858.90 | Reconciled   | £ 10, 653.90 |
| Unallocated Funds | £ 150.00     | Unreconciled | £ 10, 205.00 |

**Balance Sheet**

| Assets                        | £ 538, 962.43 | Liabilities | £ 538, 962.43 |
|-------------------------------|---------------|-------------|---------------|
| <b>Assets</b>                 |               |             |               |
| Wilton Branch Client Account  | £ 12, 362.65  |             |               |
| Morgan& Co Client Account     | £ 489, 632.93 |             |               |
| Turvey & Co                   | £ 20, 858.90  |             |               |
| Morgan & Co Held Deposits     | £ 14, 354.84  |             |               |
| Turvey & Co - Deposit Account | £ 17, 796.14  |             |               |
| <b>Liabilities</b>            |               |             |               |

**Configuration**  
Branch: Morgan & Co

- General
- News Feed
- Accounts
- Module Settings**
- Lettings
- Activity List
- Inspections
- Sales Progression Actions
- Data Transfer

**Lookup settings**

SELECT A LOOKUP TO EDIT  
Select a lookup

**Accounts grid options**

|                              |        |
|------------------------------|--------|
| Grid Row Height              | Medium |
| Modal/ Popup Grid Row Height | Small  |

- 8 Once in the 'Module Settings'. Scroll down and click "Lookup Settings"

**Configuration**  
Branch: Morgan & Co

- General
- News Feed
- Accounts
- Module Settings**
- Lettings
- Activity List
- Inspections
- Sales Progression Actions
- Data Transfer

Enter template

- ☐ CC Company in Contractor Statement
- ☒ Automatically pro rata final rent invoice
- ☐ Hide default expense sub-types
- ☐ Calculate fees on the rent Gross amount
- ☒ Show all properties on perform payments

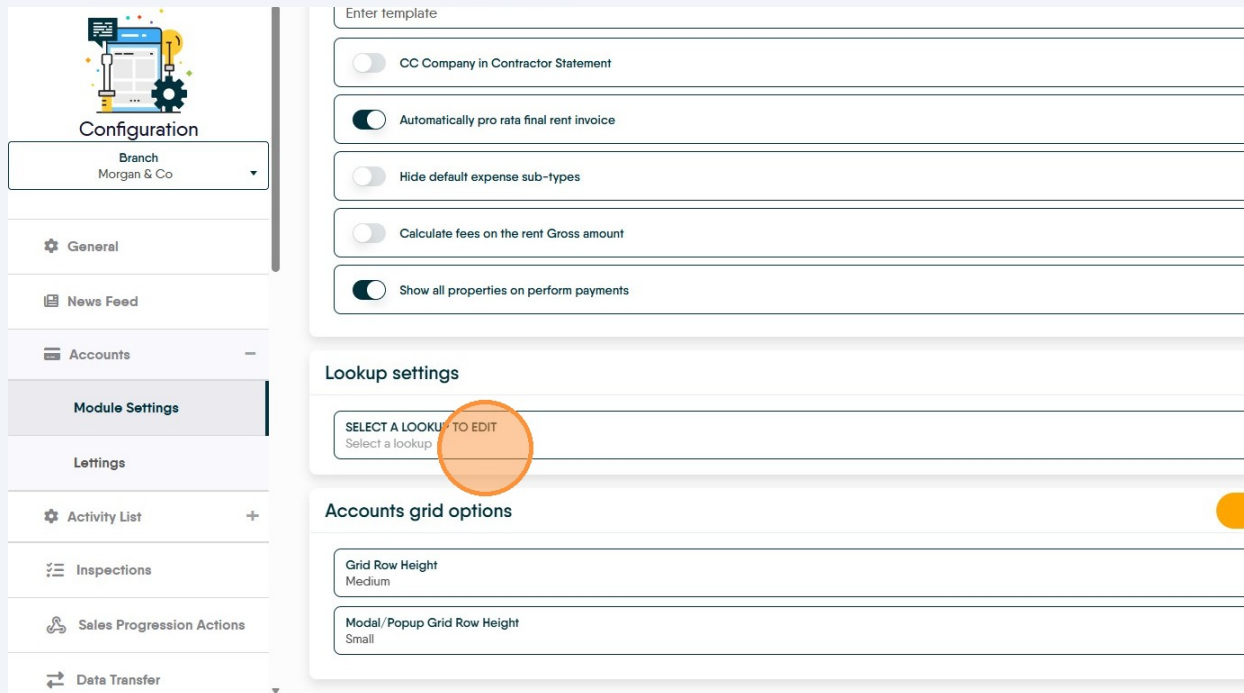
**Lookup settings**

SELECT A LOOKUP TO EDIT  
Select a lookup

**Accounts grid options**

|                              |        |
|------------------------------|--------|
| Grid Row Height              | Medium |
| Modal/ Popup Grid Row Height | Small  |

## 9 Click "Select a lookup To Edit"



The screenshot shows the 'Configuration' page for 'Morgan & Co'. The left sidebar contains a menu with 'Module Settings' highlighted. The main content area has a 'Lookup settings' section with a button labeled 'SELECT A LOOKUP TO EDIT' circled in orange. Below this is the 'Accounts grid options' section.

**Configuration**  
Branch: Morgan & Co

**Module Settings**

**Lookup settings**

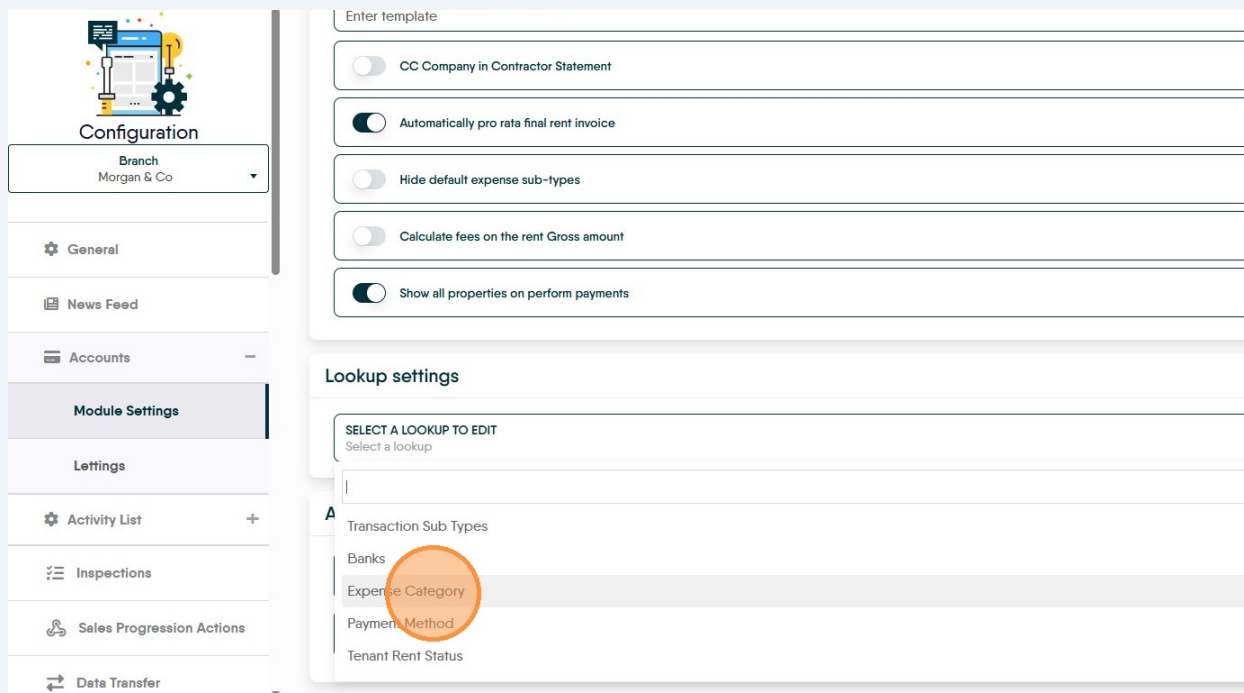
SELECT A LOOKUP TO EDIT  
Select a lookup

**Accounts grid options**

Grid Row Height  
Medium

Modal/Popup Grid Row Height  
Small

## 10 Click "Expense Category"



The screenshot shows the 'Configuration' page for 'Morgan & Co'. The left sidebar contains a menu with 'Module Settings' highlighted. The main content area has a 'Lookup settings' section with a dropdown menu open, showing 'Expense Category' circled in orange.

**Configuration**  
Branch: Morgan & Co

**Module Settings**

**Lookup settings**

SELECT A LOOKUP TO EDIT  
Select a lookup

Transaction Sub Types  
Banks  
Expense Category  
Payment Method  
Tenant Rent Status

## 11 Click "Add New"

The screenshot shows a software interface with a sidebar on the left containing icons for 'uration', 'ich & Co', 'tings', and 'fer'. The main area is titled 'Lookup settings' and includes a search bar with the placeholder 'Type here to search for a lookup option...'. Below the search bar is a table with two columns: 'Expense Category Available' and 'Expense Category In Use'. The 'Expense Category In Use' column contains a list of categories: 'Electric', 'Gas', and 'Water'. An orange circle highlights the '+ Add New' button located to the right of the search bar.

Enter template

☐ CC Company in Contractor Statement

☒ Automatically pro rate final rent invoice

☐ Hide default expense sub-types

☐ Calculate fees on the rent Gross amount

☒ Show all properties on perform payments

Lookup settings

SELECT A LOOKUP TO EDIT  
Expense Category

Type here to search for a lookup option...

+ Add New

| Expense Category Available | + Use all | Expense Category In Use | X Remove all |
|----------------------------|-----------|-------------------------|--------------|
|                            |           | Electric                |              |
|                            |           | Gas                     |              |
|                            |           | Water                   |              |

## 12 Click the "Enter Expense Category name" field.

The screenshot shows a modal dialog box titled 'Add' with a close button (X) in the top right corner. The dialog contains two input fields: 'Expense Category Name' with the placeholder text 'Enter Expense Category name', and 'Expense Category Color' with a black color picker. An orange circle highlights the 'Expense Category Name' field. At the bottom of the dialog are three buttons: 'Cancel', 'Save', and 'Save & Use'.

Add

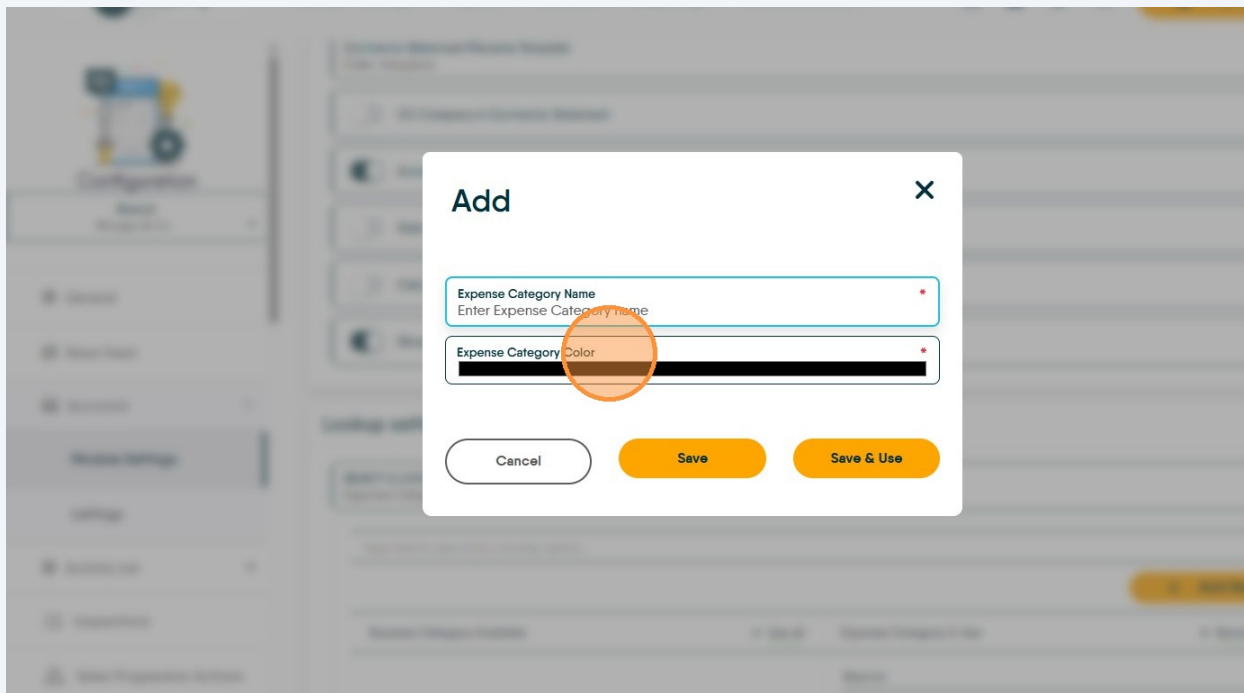
Expense Category Name  
Enter Expense Category name

Expense Category Color

Cancel Save Save & Use

13

If you want to identify the expense type with a specific colour. Click "**Expense Category Color**" and select the colour you want to use from the colour picker.



14

Click "**Save & Use**" this will make the 'Expense' category available for use immediately

