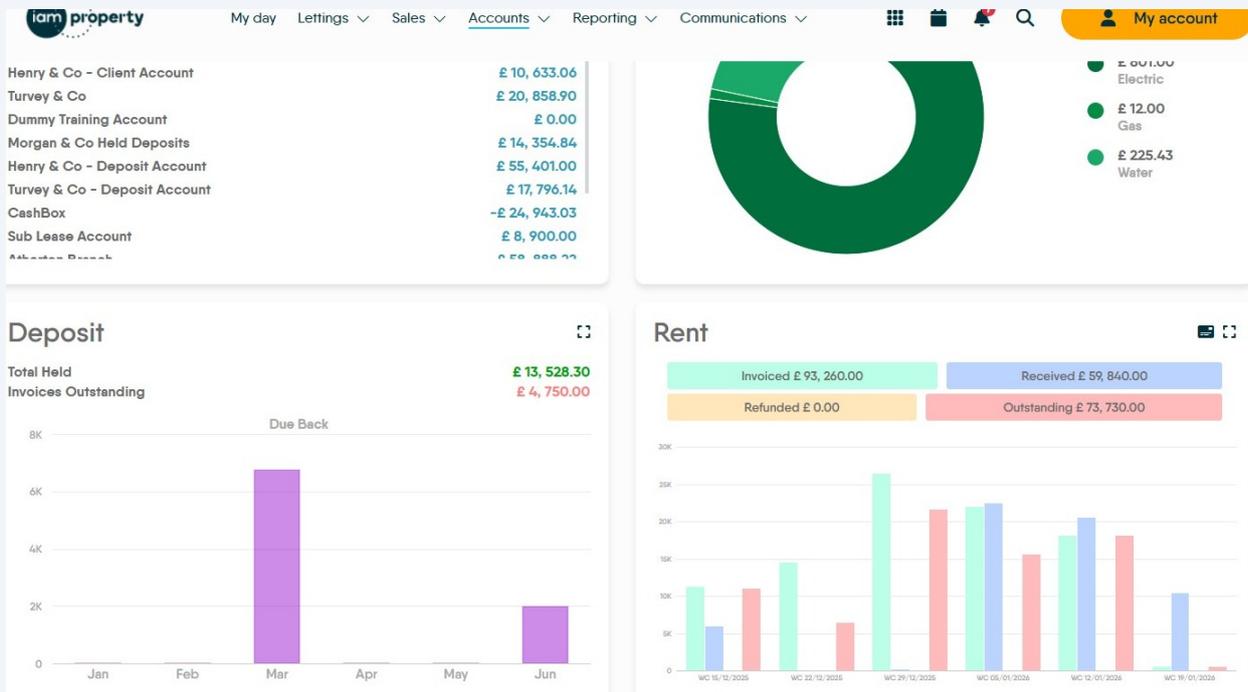


Charging a Landlord Fee

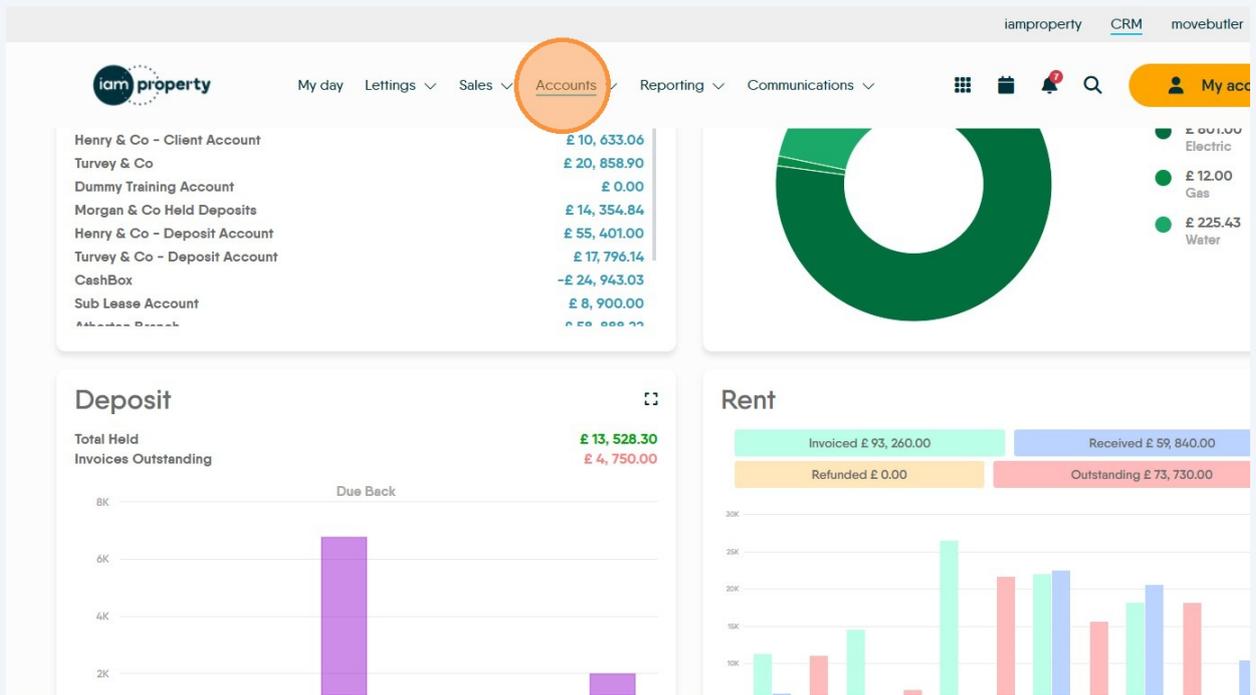


This guide provides a straightforward process for charging landlord fees and adding additional charges within the CRM system. These are fees over and above the Management Fees set in the property record, which are paid automatically when a landlord is paid.

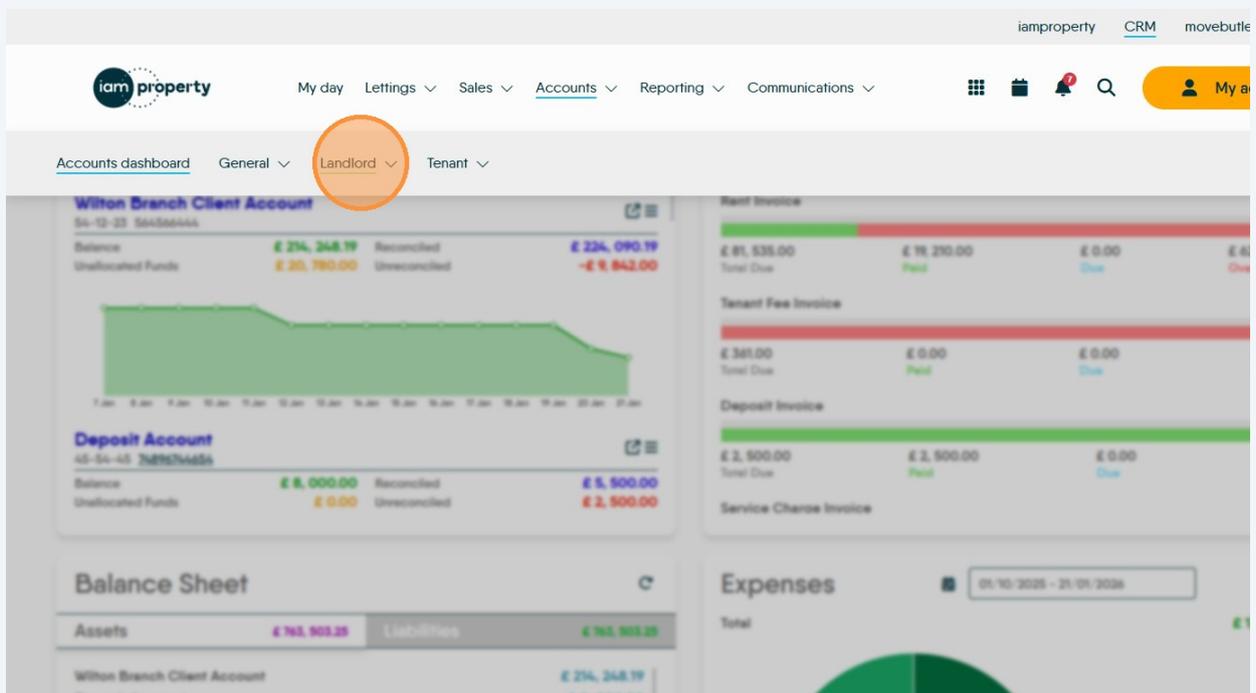
1 Navigate to <https://crm.iamproperty.com/Dashboards/Accounts>



2 Click "Accounts"



3 Click "Landlord"



4 Click "Charge Landlord Fee"

The screenshot shows the 'iam property' software interface. The top navigation bar includes 'My day', 'Lettings', 'Sales', 'Accounts', 'Reporting', and 'Communications'. Below this, there are tabs for 'Accounts dashboard', 'General', 'Landlord', and 'Tenant'. The main content area is titled 'Landlord' and contains several menu items: 'Agent Refund', 'Charge Landlord Fee', 'HMRC Payments', 'Perform Payments', 'Statement Merge', and 'Rapid Pay'. The 'Charge Landlord Fee' option is highlighted with an orange circle. Below the menu items, there are sections for 'Balance Sheet' and 'Expenses'.

Balance Sheet	
Assets	£ 763,903.25
Liabilities	£ 763,903.25
Wilton Branch Client Account	£ 214,248.19
Deposit Account	£ 8,000.00
Morgan & Co Client Account	£ 379,315.93
Wilton & Co Client Account	£ 102,339.13

Expenses	
Total	£ 801.00



Tip! You can create a charge or a credit from here. To credit a Landlord there must be an invoice to place the credit against.

5 Click "**Select landlord**" and search for your Landlord.

The screenshot shows the 'Charge Landlord Fee' form. At the top, there are two tabs: 'Invoice' (selected) and 'Credit Note'. Below the tabs are two dropdown menus: 'Landlord' (with a magnifying glass icon) and 'Property' (with a magnifying glass icon). The 'Landlord' dropdown is highlighted with an orange circle. Below these are fields for 'Transaction Date' (21/01/2026), 'Sub Type' (Select sub-type), and 'VAT Type' (VAT Type). There are also fields for 'Amount' (£ 0.00), 'Net' (£ 0.00), 'VAT' (£ 0.00), and 'Total' (£ 0.00). Below these are fields for 'Invoice No.' (CRM - 714), 'Cheque No.' (Enter cheque no.), and 'Bank Ref.' (Enter bank ref.). There are also fields for 'Paid Rent' (£ 0.00) and a toggle for 'Pay Invoice from Rent'. A 'Description' field is labeled 'Enter transaction note'. At the bottom, there is a 'Total' field showing £ 0.00. At the very bottom, there are three buttons: 'Cancel', 'Another', and 'OK'.

6 Click the "**Property**" menu and select the property you are creating the charge against.

It is possible to search by property rather than Landlord, to do this click on the magnifying glass icon next to the property field.

The screenshot shows the 'Charge Landlord Fee' form. At the top, there are two tabs: 'Invoice' (selected) and 'Credit Note'. Below the tabs are two dropdown menus: 'Landlord' (with a magnifying glass icon) and 'Property' (with a magnifying glass icon). The 'Property' dropdown is highlighted with an orange circle. Below these are fields for 'Transaction Date' (21/01/2026), 'Sub Type' (Select sub-type), and 'VAT Type' (VAT Type). There are also fields for 'Amount' (£ 0.00), 'Net' (£ 0.00), 'VAT' (£ 0.00), and 'Total' (£ 0.00). Below these are fields for 'Invoice No.' (CRM - 714), 'Cheque No.' (Enter cheque no.), and 'Bank Ref.' (Enter bank ref.). There are also fields for 'Paid Rent' (£ 0.00) and a toggle for 'Pay Invoice from Rent'. A 'Description' field is labeled 'Enter transaction note'. At the bottom, there is a 'Total' field showing £ 0.00. At the very bottom, there are three buttons: 'Cancel', 'Another', and 'OK'.

7 Check the **"Transaction Date"** is correct.

The screenshot shows the 'Charge Landlord Fee' form. The 'Transaction Date' field is highlighted with an orange border and contains the date '21/01/2026'. Other fields include 'Invoice' and 'Credit Note' tabs, 'Landlord' (Pamela Green), 'Property' (24 Westgarth Terrace, Darlington), 'Sub Type' (Select sub-type), 'VAT Type' (VAT Type), 'Amount' (£ 0.00), 'Net' (£ 0.00), 'VAT' (£ 0.00), 'Total' (£ 0.00), 'Invoice No.' (CRM - 714), 'Cheque No.', 'Bank Ref.', 'Paid Rent' (£ 10,501.37), 'Pay Invoice from Rent' (toggle), 'Description', and 'Unallocated Funds' (Total £ 0.00). Buttons for 'Cancel', 'Another', and 'OK' are at the bottom.

8 Click **"Select sub-type"** and select from the menu, sub types are customisable and will impact how the VAT is charged on the fee.

The screenshot shows the 'Charge Landlord Fee' form with the 'Sub Type' dropdown menu open. The menu is highlighted with an orange circle and lists options: 'Additional Fee', 'VAT Inclusive', 'VAT Exclusive', 'VAT Exempt', 'Landlord Fee Invoice - VAT Inclusive', and 'Landlord Fee Invoice - VAT'. The 'Transaction Date' field is now '21/01/2026'. A calendar for January 2026 is visible on the left, with the 21st highlighted. Other fields and buttons are the same as in the previous screenshot.

9 The 'sub type' controls how the VAT is shown here once the fee amount is added.

The screenshot shows the 'Charge Landlord Fee' form. The 'Amount' field is set to £20. The 'Sub Type' is 'Additional Fee', which results in a VAT of £3.33 and a total of £20.00. The VAT section is highlighted with an orange box.

Field	Value
Invoice	Invoice
Credit Note	Credit Note
Landlord	Pamela Green
Property	24 Westgarth Terrace, Darlington
Transaction Date	21/01/2026
Sub Type	Additional Fee
VAT Type	Inclusive
Amount	£ 20
Net	£ 16.67
VAT	£ 3.33
Total	£ 20.00
Invoice No.	CRM - 714
Cheque No.	Enter cheque no.
Bank Ref.	Enter bank ref.
Paid Rent	£ 10,501.37
Pay Invoice from Rent	<input type="checkbox"/>
Description	Enter transaction note
Unallocated Funds	Total £ 0.00

10 Click the "Amount" field and add the amount of the fee.

The screenshot shows the 'Charge Landlord Fee' form. The 'Amount' field is highlighted with an orange circle and is currently set to £0.00. The 'Sub Type' is 'Additional Fee', which results in a VAT of £0.00 and a total of £0.00.

Field	Value
Invoice	Invoice
Credit Note	Credit Note
Landlord	Pamela Green
Property	24 Westgarth Terrace, Darlington
Transaction Date	21/01/2026
Sub Type	Additional Fee
VAT Type	Inclusive
Amount	£ 0.00
Net	£ 0.00
VAT	£ 0.00
Total	£ 0.00
Invoice No.	CRM - 714
Cheque No.	Enter cheque no.
Bank Ref.	Enter bank ref.
Paid Rent	£ 10,501.37
Pay Invoice from Rent	<input type="checkbox"/>
Description	Enter transaction note
Unallocated Funds	Total £ 0.00

11

Click the "Invoice No." field. The invoice number will be automatically added, if a prefix (e.g. CRM) is required it can be set in configuration.

The screenshot shows the 'Charge Landlord Fee' form with the following fields and values:

- Invoice** (selected) / **Credit Note**
- Landlord:** Pamela Green
- Property:** 24 Westgarth Terrace, Darlington
- Transaction Date:** 21/01/2026
- Sub Type:** Additional Fee
- VAT Type:** Inclusive
- Amount:** £ 20.00
- Net:** £ 16.67
- VAT:** £ 3.33
- Total:** £ 20.00
- Invoice No.:** CRM - 714 (highlighted with an orange circle)
- Cheque No.:** Enter cheque no.
- Bank Ref.:** Enter bank ref.
- Paid Rent:** £ 10,501.37
- Pay Invoice from Rent:**
- Description:** Enter transaction note
- Unallocated Funds:**
- Total:** £ 0.00

Buttons at the bottom: Cancel, Another, OK

12

This screen has the option to take the payment for the fee from the rent, select this icon to do that. This collects the fee payment at that moment before any other payments are made.

The screenshot shows the 'Charge Landlord Fee' form with the following fields and values:

- Invoice** (selected) / **Credit Note**
- Landlord:** Pamela Green
- Property:** 24 Westgarth Terrace, Darlington
- Transaction Date:** 21/01/2026
- Sub Type:** Additional Fee
- VAT Type:** Inclusive
- Amount:** £ 20.00
- Net:** £ 16.67
- VAT:** £ 3.33
- Total:** £ 20.00
- Invoice No.:** CRM - 714
- Cheque No.:** Enter cheque no.
- Bank Ref.:** Enter bank ref.
- Paid Rent:** £ 10,501.37
- Pay Invoice from Rent:** (highlighted with an orange circle)
- Description:** Enter transaction note
- Unallocated Funds:**
- Total:** £ 0.00

Buttons at the bottom: Cancel, Another, OK

13 Click the **"Description"** field. Add a clear description of the charge

The screenshot shows the 'Charge Landlord Fee' form. The 'Description' field is highlighted with an orange circle. The form contains the following fields and values:

Invoice	Credit Note	Landlord Pamela Green	Property 24 Westgarth Terrace, Darlington
Transaction Date 21/01/2026	Sub Type Additional Fee	VAT Type Inclusive	
Amount £ 20.00	Net £ 16.67	VAT £ 3.33	Total £ 20.00
Invoice No. CRM - 714	Cheque No. Enter cheque no.	Bank Ref. Enter bank ref.	
Paid Rent £ 10,501.37	Pay Invoice from Rent <input type="checkbox"/>		
Description Enter transaction note			
Unallocated Funds			Total £ 0.00

Buttons: Cancel, Another, OK

14 Click **"OK"** to create the Landlord Fee

The screenshot shows the 'Charge Landlord Fee' form. The 'OK' button is highlighted with an orange circle. The form contains the following fields and values:

Invoice	Credit Note	Landlord Pamela Green	Property 24 Westgarth Terrace, Darlington
Transaction Date 21/01/2026	Sub Type Additional Fee	VAT Type Inclusive	
Amount £ 20.00	Net £ 16.67	VAT £ 3.33	Total £ 20.00
Invoice No. CRM - 714	Cheque No. Enter cheque no.	Bank Ref. Enter bank ref.	
Paid Rent £ 10,501.37	Pay Invoice from Rent <input type="checkbox"/>		
Description Add a clear description of the charge			
Unallocated Funds			Total £ 0.00

Buttons: Cancel, Another, OK

15 A Landlord Invoice can be created if required. Select the option required.

The screenshot shows a 'Charge Landlord Fee' form with a modal dialog box. The form fields include:

- Buttons: Invoice, Credit Note
- Landlord: Pamela Green
- Property: 24 Westgarth Terrace, Darlington
- Transaction Date: 21/01/2026
- Amount: £ 20.00
- Total: £ 20.00
- Invoice No.: CRM - 714
- Paid Rent: £ 10,501.37
- Description: Add a clear description of the charge
- Unallocated Funds: £ 0.00
- Buttons: Cancel, Another, OK

The modal dialog box contains the following text and elements:

- Question mark icon
- Text: "Would you like to produce a landlord invoice?"
- Buttons: No, Yes