

Using Perform Payments in CRM



This guide provides a step-by-step process for efficiently managing payments within the CRM system, ensuring users can navigate the platform with ease. By following these instructions, users can streamline their payment processes, maintain accurate financial records, and enhance their overall productivity. Whether you're a landlord or property manager, this guide is essential for simplifying payment tasks and improving financial management.

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

The screenshot displays the 'Accounts' dashboard in the CRM system. It features several key sections:

- Accounts:** Lists two client accounts:
 - Morgan & Co Client Account:** Balance £411,213.29 (Reconciled), Unallocated Funds £30,869.49 (Unreconciled), and a total of £254,616.31 (Reconciled) and £156,596.98 (Unreconciled).
 - Turvey & Co:** Balance £22,158.90 (Reconciled), Unallocated Funds £150.00 (Unreconciled), and a total of £10,653.90 (Reconciled) and £11,505.00 (Unreconciled).
- Invoices:** Shows a list of invoices for the period 21/10/2025 - 18/11/2025, including Rent Invoice, Tenant Fee Invoice, Deposit Invoice, and Service Charge Invoice, with columns for Total Due, Paid, and Overdue amounts.
- Balance Sheet:** Shows Assets and Liabilities both totaling £460,642.79, with a breakdown of Wilton Branch Client Account, Morgan & Co Client Account, Turvey & Co, and Morgan & Co Held Deposits.
- Expenses:** Shows a total of £720.43 for the period 01/08/2025 - 18/11/2025, with a donut chart and a legend indicating £261.00 for Electric and £228.00 for another category.

2 Click "Accounts"

The screenshot shows the iamproperty CRM interface. The top navigation bar includes 'iamproperty', 'CRM', and 'movebutler'. The main navigation menu has 'My day', 'Lettings', 'Sales', 'Accounts' (circled in orange), 'Reporting', and 'Communications'. The 'Accounts' section is active, displaying a dashboard with the following components:

- Accounts:** A list of client accounts. The 'Morgan & Co Client Account' (01-02-03, 01234567) shows a balance of £411,213.29 (Reconciled) and £254,616.31 (Unreconciled). The 'Turvey & Co' (24-52-19, 24521960) shows a balance of £22,158.90 (Reconciled) and £10,653.90 (Unreconciled).
- Balance Sheet:** A table showing Assets (£460,642.79) and Liabilities (£460,642.79).
- Invoices:** A list of invoices for the period 21/10/2025 - 18/11/2025, including Rent Invoice, Tenant Fee Invoice, Deposit Invoice, and Service Charge Invoice.
- Expenses:** A pie chart showing total expenses for the period 01/08/2025 - 18/11/2025.

3 Click "General"

The screenshot shows the same iamproperty CRM interface as above, but with the 'Accounts' menu item expanded to show sub-options: 'Accounts dashboard', 'General' (circled in orange), 'Landlord', and 'Tenant'. The main dashboard content is dimmed, showing the same financial data for Morgan & Co Client Account, Turvey & Co, Balance Sheet, Invoices, and Expenses.

4 Click "Landlord"

The screenshot shows the 'iamproperty' Accounts dashboard. The top navigation bar includes 'My day', 'Lettings', 'Sales', 'Accounts', 'Reporting', and 'Communications'. The 'Accounts' menu is expanded, showing 'General', 'Landlord', and 'Tenant'. The 'Landlord' option is circled in orange. Below the navigation, the 'General' section is active, displaying a grid of links: Adjustment, Credit Note, Regular Charges, Contractor Statement Me, BACS List, Jobs Outstanding, Regular Expenses, Bank Receipt, Ledger Transfer, Unallocated, Cash Account, Opening Balances, and View Ledgers. At the bottom, a 'Balance Sheet' table is partially visible, showing assets and liabilities for 'Wilton Branch Client Account'.

5 Click "Perform Payments"

The screenshot shows the 'iamproperty' Accounts dashboard with the 'Landlord' menu item selected. The 'Landlord' section is active, displaying a grid of links: Agent Refund, HMRC Payments, Statement Merge, Charge Landlord Fee, Perform Payments, and Rapid Pay. The 'Perform Payments' option is circled in orange. Below the navigation, the 'Landlord' section is active, displaying a grid of links: Agent Refund, HMRC Payments, Statement Merge, Charge Landlord Fee, Perform Payments, and Rapid Pay. At the bottom, a 'Balance Sheet' table and an 'Expenses' chart are visible. The 'Balance Sheet' table shows assets and liabilities for 'Wilton Branch Client Account', 'Morgan & Co Client Account', 'Turvey & Co', and 'Morgan & Co Held Deposits'. The 'Expenses' chart shows a total of £261.00 for the period 01/08/2025 - 18/11/2025.

6

The Perform Payments screen will show "Property, Landlord, Current Balance, Rent Balance, Due Date, Last Payment Date, OS Rent Invoices, OS Landlord Invoices and OS Contractor Invoices" (OS = Outstanding)

Property	Landlord	Current Balance	Rent Balance	Due Date	Last Payment Date	OS Rent Invoices	OS Landlord Invoices	OS Contractor Invoices
Beer Haven Long Hill, Beer, Seaton	Winston Churchill	£ 0.00	£ 0.00	24/03/2023	04/06/2025	£ 0.00	£ 0.00	£ 0.00
1 Windjammer Court Shelly Road, Exmouth	Kerry Frances	£ 900.00	£ 0.00	24/03/2023	19/08/2025	£ 2,200.00	£ 0.00	£ 0.00
2 Dinan Way, Exmouth	Winston Churchill	£ 0.00	£ 0.00	24/03/2023	20/08/2025	£ 1,900.00	£ 0.00	£ 0.00
1 Hulham Road, Exmouth	Kerry Frances	£ 0.00	£ 0.00	24/03/2023	18/09/2024	£ 0.00	£ 0.00	£ 0.00
Flat 2 Chesterfields, Stanhope Road, Darli...	Eve Harmon	£ 2,380.00	£ 2,380.00	27/03/2023	03/07/2025	£ 595.00	£ 0.00	£ 48.00
1 Spruce Grove, Darlington	Pamela Green	£ 0.00	£ 0.00	02/06/2024	28/10/2025	£ 800.00	£ 0.00	£ 0.00
8 Carlton Moor Crescent, Darlington	Arthur Morgan	£ 0.00	£ 0.00	27/03/2023	11/02/2025	£ 0.00	£ 0.00	£ 0.00
57 Elton Parade, Darlington	Margaret Morgan	£ 0.00	£ 0.00	27/04/2023		£ 0.00	£ 0.00	£ 0.00
47 Prince Charles Way, Seaton	Moz Wilkes (L)	£ 0.00	£ 0.00	03/04/2023		£ 0.00	£ 0.00	£ 0.00
68 Clifton Road, Darlington	Oliver Hardy	£ 0.00	£ 0.00	14/04/2023	19/07/2023	£ 0.00	£ 0.00	£ 0.00

1 to 10 of 122 < > Page 1 of 13 > >

7

Click the checkbox next to the payments you wish to make. You can sort this list using the 'Record Type' option this will allow the option of a Portfolio view or a Property view (as shown). Once the Landlords you wish to pay have been selected, click the 'Pay Selected' icon (2ticks)

The list can also be sorted by using any of the column headers, the most useful will be 'Last Payment Date' as this shows the date the last payment was made to a Landlord. This screen can also be exported to a .csv file for reference or use in excel/sheets etc.

iam property My day Lettings Sales Accounts Reporting Communications My acc

Perform Payments Total Balance £ 113,748.32 Total to Pay £ 7,200.00

Record Type Property Search 10

Property	Landlord	Current Balance	Rent Balance	Due Date	Last Payment Date
711 Pelaw Crescent, Chester le St...	Lettings Landlord42	£ 7,200.00	£ 7,200.00	08/10/2024	30/06/2025
822 Pelaw Crescent, Chester le S...	Landlord25	£ 7,200.00	£ 7,200.00	12/12/2024	30/06/2025
919 Pelaw Crescent, Chester le S...	Adrian Green	£ 7,000.00	£ 7,000.00	18/11/2024	08/01/2025
111 Yew Tree Close, Hurworth, Dar...	Landlord99	£ 7,000.00	£ 7,000.00	22/11/2024	30/06/2025
729 Pelaw Crescent, Chester le S...	Josephine morgan	£ 6,800.00	£ 6,800.00	15/11/2024	31/07/2025
913 Pelaw Crescent, Chester le S...	Lettings Landlord89	£ 6,499.00	£ 6,499.00	07/05/2025	31/07/2025
8974 Kingsway, Darlington	Mildred Mallaby	£ 6,200.00	£ 6,200.00	23/08/2024	31/07/2025
355 Yew Tree Close, Hurworth, D...	Steven Morgan	£ 5,200.00	£ 5,200.00	14/08/2024	01/10/2025
71 Pelaw Crescent, Chester le Str...	Lettings Landlord35	£ 5,000.00	£ 5,000.00	11/03/2024	31/07/2025
110 Yew Tree Close, Hurworth, D...	Steven Morgan	£ 5,000.00	£ 5,000.00	11/03/2024	31/07/2025

8

The "Perform Payments" screen will show on the right side of the screen. This shows all of the payment detail for a payment to a Landlord.

Perform Payments
 Total Balance £106,548.32 Total to Pay £28,400.00

Record Type: Property

Property	Landlord	Current Balance
822 Pelaw Crescent, Chester le S...	Landlord25	£ 7,200.00
919 Pelaw Crescent, Chester le S...	Adrian Green	£ 7,000.00
111 Yew Tree Close, Hurworth, Da...	Landlord99	£ 7,000.00
729 Pelaw Crescent, Chester le S...	Josephine morgan	£ 6,800.00
913 Pelaw Crescent, Chester le S...	Lettings Landlord89	£ 6,499.00
8974 Kingsway, Darlington	Mildred Mallaby	£ 6,200.00
355 Yew Tree Close, Hurworth, D...	Steven Morgan	£ 5,200.00
71 Pelaw Crescent, Chester le Str...	Lettings Landlord35	£ 5,000.00
162 Yew Tree Close, Hurworth, D...	Alfie Martin	£ 4,800.00
34 Kingsway, Darlington	Letting Landlord80	£ 4,500.00

1 to 10 of 121 Page 1 of 13

822 Pelaw Crescent, Chester le Street (2 of 4)
 Landlord25 - 100%

Current Balance: £ 7,200.00 Rent Balance: £ 7,200.00 Float Balance: £ 0.00

Payment Date: 18/11/2025 Payment Method: BACS Bank Account: Morgan's Co Client Account

Pay Out Float: Maintain Float: Float Amount: £ 0

Exclude Management Fees: Exclude Landlord Fees: Exclude Expenses:

Bank Reference: Enter bank ref. Cheque No.: Enter cheque no.

Transaction Note: Landlord Payment - 822 Pelaw Crescent, Chester le Street

Balance		£ 7,200.00	
Deductions	Net	Vat	Total
Expenses	£ 0.00	£ 0.00	£ 0.00
Management fee - 10%	£ 720.00	£ 144.00	£ 864.00
Letting Fee -	£ 0.00	£ 0.00	£ 0.00
Landlord Fees	£ 0.00	£ 0.00	£ 0.00
Overseas Tax	£ 0.00	£ 0.00	£ 0.00
Transfer to float	£ 0.00	£ 0.00	£ 0.00
Total	£ 720.00	£ 144.00	£ 864.00

Disbursements		£ 6,336.00	
	Net	Vat	Total
Payment from float	£ 0.00	£ 0.00	£ 0.00
Landlord25			£ 6,336.00
Total to pay			£ 6,336.00

Cancel Pay

9

The top section of this screen shows information on the current balances, these are the amounts in the Landlords account before any other charges. Current Balance is any funds retained/held on the Landlords account, Rent Balance is the rent due to the Landlord (pre-expenses and fees). Also visible is the current Float balance, the float can also be managed from here. Fees and Expenses can also be excluded from here, if fees and expenses are excluded they are rolled over to the next month.

822 Pelaw Crescent, Chester le Street (2 of 4)
Landlord25 - 100%

Current Balance: £ 7,200.00 Rent Balance: £ 7,200.00 Float Balance: £ 0.00

Payment Date: 18/11/2025 Payment Method: BACS Bank Account: Morgan& Co Client Account

Pay Out Float: Maintain Float: Float Amount: £ 0

Exclude Management Fees: Exclude Landlord Fees: Exclude Expenses:

Bank Reference: Enter bank ref. Cheque No.: Enter cheque no.

Transaction Note: Landlord Payment - 822 Pelaw Crescent, Chester le Street

Balance			£ 7,200.00
Deductions	Net	Vat	Total

10

The bottom part of this screen shows the balances that will be charged to or paid out from you to the landlords. By clicking on the 'Edit Amounts' icon some of the balances can be edited.

If on this screen there are 2 lines for Expenses, one as shown here and another in a larger font, this second option is for any expenses that have already been paid to the contractor via the 'Save and Perform Payment' option.

Landlord **Edit** - 822 Pelaw Crescent, Chester le Street

Balance 		£ 7,200.00		
Deductions				
	Net	Vat	Total	
Expenses	£ 0.00	£ 0.00	£ 0.00	
Management fee - 10%	£ 720.00	£ 144.00	£ 864.00	
Letting Fee -	£ 0.00	£ 0.00	£ 0.00	
Landlord Fees	£ 0.00	£ 0.00	£ 0.00	
Overseas Tax	£ 0.00	£ 0.00	£ 0.00	
Transfer to float	£ 0.00	£ 0.00	£ 0.00	
Total	£ 720.00	£ 144.00	£ 864.00	
Disbursements				
	Net	Vat	Total	
Payment from float	£ 0.00	£ 0.00	£ 0.00	
Landlord25			£ 6,336.00	
Total to pay			£ 6,336.00	

11

These amounts can be edited. If the Landlord disbursement is edited, any retained payment will be held against the Landlords account and will be available to be paid out at the next perform payments.

Once all the edits are complete, click the 'green tick'

Landlord	Current Balance
Landlord25	£ 7,200.00
Adrian Green	£ 7,000.00
Landlord99	£ 7,000.00
Josephine morgan	£ 6,800.00
Lettings Landlord89	£ 6,499.00
Mildred Mallaby	£ 6,200.00
Steven Morgan	£ 5,200.00
Lattings Landlord35	£ 5,000.00
Alfie Martin	£ 4,800.00
Letting Landlord80	£ 4,500.00

Payment Date: 18/11/2025 | Payment Method: BACS

Pay Out Float: | Maintain Float:

Exclude Management Fees: | Exclude Landlord Fees:

Bank Reference: Enter bank ref. | Cheque No.: Enter ch

Transaction Note: Landlord Payment - 822 Pelaw Crescent, Chester le Street

Balance	
Deductions	Net
Expenses	£ 0.00
Management fee - 10%	£ 720.00
Letting Fee -	£ 0.00
Landlord Fees	£ 0.00
Overseas Tax	£ 0.00
Transfer to float	£ 0.00

12

Clicking "Pay" will create the payment line to the Landlord and if not paid previously will create the payments to any contractors. If the payments are to be made via BACS then these will be added to your BACS list, if payments are cheque, bank transfer etc then the payment line will show in the Client Account on CRM.

5	£ 7,200.00
ven	£ 7,000.00
7	£ 7,000.00
morgan	£ 6,800.00
ndlord89	£ 6,499.00
allaby	£ 6,200.00
rgan	£ 5,200.00
ndlord35	£ 5,000.00
1	£ 4,800.00
ndlord80	£ 4,500.00

Exclude Management Fees: | Exclude Landlord Fees: | Exclude Expenses:

Bank Reference: Enter bank ref. | Cheque No.: Enter cheque no.

Transaction Note: Landlord Payment - 822 Pelaw Crescent, Chester le Street

Balance		£ 7,200.00	
Deductions	Net	Vat	Total
Expenses	£ 0.00	£ 0.00	£ 0.00
Management fee - 10%	£ 720.00	£ 144.00	£ 864.00
Letting Fee -	£ 0.00	£ 0.00	£ 0.00
Landlord Fees	£ 0.00	£ 0.00	£ 0.00
Overseas Tax	£ 0.00	£ 0.00	£ 0.00
Transfer to float	£ 0.00	£ 0.00	£ 0.00
Total	£ 720.00	£ 144.00	£ 864.00
Disbursements	Net	Vat	Total
Payment from float	£ 0.00	£ 0.00	£ 0.00
Landlord25			£ 6,336.00
Total to pay			£ 6,336.00

13

The icon highlighted here shows if there are any expenses that are in 'Jobs Outstanding' and have NOT yet been charged to the Landlord. Clicking here will take you to the Jobs Outstanding screen where the job can be charged to the Landlord.

The screenshot shows the CRM interface for 'The Close, Hurworth, Darlington'. At the top, there are navigation links for 'iamproperty', 'CRM', 'movebutler', and 'iamsold'. Below this is a navigation bar with icons for a grid, calendar, notifications, and search, along with a 'My account' button. The main header displays the property name and 'endor10 - 100%'. A 'Jobs Outstanding' icon, which consists of a document with a magnifying glass and a red notification bubble, is highlighted with a red box. Below the header, there are three balance boxes: 'Rent Balance: £ 0.00' (highlighted in light blue), 'Payment Method: BACS', and 'Bank Account: Morgan & Co Client Account'. There are also several toggle switches for 'Maintain Float', 'Exclude Landlord Fees', and 'Exclude Expenses'.

14

The icon highlighted here allows a sample statement to be created.

This screenshot is identical to the one above, showing the CRM interface for 'The Close, Hurworth, Darlington'. In this version, the 'Sample Statement' icon, which consists of a document with a magnifying glass and a red notification bubble, is highlighted with a red box. The rest of the interface, including the navigation bar, balance boxes, and toggle switches, remains the same.

15

Click "**Landlord Statement**" and select from the drop down menu, set the statement dates if required and any other fields required. Click "View"



