

Viewing and Paying Outstanding Invoices



This guide provides a straightforward process for viewing and paying outstanding invoices through the IAM Property CRM platform.

By following the steps outlined, users can efficiently manage their financial obligations, ensuring timely payments and better organization of their accounts. It simplifies the process of chasing unpaid invoices, making it accessible even for those who may not be tech-savvy. Viewing this guide can save time and reduce the risk of late payments.

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

The screenshot displays the IAM Property CRM dashboard with the following sections:

- Accounts:**
 - Wilton Branch Client Account** (54-12-23 564566444): Balance £ 214,248.19, Reconciled £ 224,090.19, Unallocated Funds £ 20,780.00, Unreconciled -£ 9,842.00.
 - Deposit Account** (45-54-45 74896744654): Balance £ 8,000.00, Reconciled £ 5,500.00, Unallocated Funds £ 0.00, Unreconciled £ 2,500.00.
- Balance Sheet:**
 - Assets: £ 763,503.25
 - Liabilities: £ 763,503.25
 - Wilton Branch Client Account: £ 214,248.19
 - Deposit Account: £ 8,000.00
 - Morgan & Co Client Account: £ 379,315.93
 - Henry & Co - Client Account: £ 10,633.06
- Invoices:** (Period: 25/12/2025 - 22/01/2026)
 - Rent Invoice:** Total Due £ 76,410.00, Paid £ 16,210.00, Due £ 0.00, Overdue £ 60,200.00.
 - Tenant Fee Invoice:** Total Due £ 361.00, Paid £ 0.00, Due £ 0.00, Overdue £ 361.00.
 - Deposit Invoice:** Total Due £ 2,500.00, Paid £ 2,500.00, Due £ 0.00, Overdue £ 0.00.
 - Service Charge Invoice:** (Details partially obscured)
- Expenses:** (Period: 01/10/2025 - 22/01/2026)
 - Total: £ 1,143.43
 - Electric: £ 906.00

2 On the "Invoices" tile. Click here.

The screenshot shows the iamproperty CRM dashboard. The top navigation bar includes 'iamproperty', 'CRM', 'movebutler', and 'iamsold'. Below this is a secondary navigation bar with 'My day', 'Lettings', 'Sales', 'Accounts', 'Reporting', and 'Communications'. The main content area is divided into four tiles: 'Units', 'Invoices', 'Balance Sheet', and 'Expenses'. The 'Invoices' tile is highlighted with a red circle around the 'View All' link in its top right corner. The date range for the Invoices tile is '25/12/2025 - 22/01/2026'. The 'Units' tile shows 'Ranch Client Account' with a balance of £214,248.19. The 'Balance Sheet' tile shows a total of £763,503.25. The 'Expenses' tile shows a total of £1,152.43.

3 Click "View All Invoices" This will allow you to view all outstanding invoices, both those that are for you to collect e.g. Rent Invoices and others such as Expenses invoices to landlords. The invoices shown are those between the dates shown (highlighted) on screen, the date bar can be edited to change the options

The screenshot shows the iamproperty CRM dashboard with the 'Invoices' tile selected. A date range '25/12/2025 - 22/01/2026' is highlighted with a red box. A dropdown menu is open, showing options: 'View All Invoices', 'New Invoice', 'New Credit Note', 'Import', 'Rent Invoicing', 'Charge Landlord Fee', 'Service Charges', and 'Pay Tenant Invoices'. The 'View All Invoices' option is highlighted with a red circle. The 'Invoices' tile shows a list of invoices: 'Rent Invoice' (Total Due £76,410.00, Paid £16,210.00, Due £0.00, Overdue £60,200.00), 'Tenant Fee Invoice' (Total Due £361.00, Paid £0.00, Due £0.00, Overdue £361.00), 'Deposit Invoice' (Total Due £2,500.00, Paid £2,500.00, Due £0.00, Overdue £0.00), and 'Service Charge Invoice' (Total Due £0.00, Paid £0.00, Due £0.00, Overdue £0.00). The 'Expenses' tile shows a total of £1,152.43.

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Click here to increase the number of rows that can be viewed onscreen.

iamproperty CRM movebutler iamsold

property My day Lettings Sales Accounts Reporting Communications My account

Outstanding Invoices All All Total Outstanding £ 0.00 To Rows per page £ 0.00

Date 026 Payment Method Select payment method Bank Account Select payment account Search 10

Loading invoices...

property My day Lettings Sales Accounts Reporting Communications My account

Outstanding Invoices All All Total Outstanding £ 333,803.50 Total to Pay £ 0.00

Date 026 Payment Method Select payment method Bank Account Select payment account Search

| Invoice No. | Record Type | Record | Property | Invoice Type | Description | Due |
|-------------|-------------|-----------------------|----------------------------|--------------|------------------------------|-------------|
| M - 714 | Tenant | lettings applicant183 | 7159 Pelaw Crescent, Ch... | Rent Invoice | Mr lettings applicant183 ... | 01/04/20... |
| M - 714 | Tenant | lettings applicant183 | 7159 Pelaw Crescent, Ch... | Rent Invoice | Mr lettings applicant183 ... | 01/05/20... |
| M - 714 | Tenant | lettings applicant183 | 7159 Pelaw Crescent, Ch... | Rent Invoice | Mr lettings applicant183 ... | 01/06/20... |
| M - 714 | Tenant | lettings applicant183 | 7159 Pelaw Crescent, Ch... | Rent Invoice | Mr lettings applicant183 ... | 01/07/2020 |
| M - 714 | Tenant | lettings applicant183 | 7159 Pelaw Crescent, Ch... | Rent Invoice | Mr lettings applicant183 ... | 01/08/20... |
| M - 714 | Tenant | lettings applicant183 | 7159 Pelaw Crescent, Ch... | Rent Invoice | Mr lettings applicant183 ... | 01/09/20... |
| M - 714 | Tenant | lettings applicant183 | 7159 Pelaw Crescent, Ch... | Rent Invoice | Mr lettings applicant183 ... | 01/10/2020 |

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If you are looking for specific results, click the "Search" field.

The screenshot shows the 'Outstanding Invoices' page in the 'iamproperty' system. The page header includes navigation menus for 'My day', 'Lettings', 'Sales', 'Accounts', 'Reporting', and 'Communications'. A search bar is located in the top right corner, next to a 'My account' button. Below the header, there are filters for 'Date' (set to 026), 'Payment Method', and 'Bank Account'. A 'Search' field is highlighted with an orange circle. The main table displays a list of invoices with columns for 'Invoice No.', 'Record Type', 'Record', 'Property', 'Invoice Type', 'Description', and 'Due Date'. The 'Total Outstanding' is £333,803.50 and 'Total to Pay' is £0.00.

| Invoice No. | Record Type | Record | Property | Invoice Type | Description | Due Date |
|-------------|-------------|-----------------------|----------------------------|--------------|------------------------------|-------------|
| M - 714 | Tenant | lettings applicant183 | 7159 Pelaw Crescent, Ch... | Rent Invoice | Mr lettings applicant183 ... | 01/01/2020 |
| M - 714 | Tenant | lettings applicant183 | 7159 Pelaw Crescent, Ch... | Rent Invoice | Mr lettings applicant183 ... | 01/02/20... |
| M - 714 | Tenant | lettings applicant183 | 7159 Pelaw Crescent, Ch... | Rent Invoice | Mr lettings applicant183 ... | 01/03/20... |
| M - 714 | Tenant | lettings applicant183 | 7159 Pelaw Crescent, Ch... | Rent Invoice | Mr lettings applicant183 ... | 01/04/20... |
| M - 714 | Tenant | lettings applicant183 | 7159 Pelaw Crescent, Ch... | Rent Invoice | Mr lettings applicant183 ... | 01/05/20... |
| M - 714 | Tenant | lettings applicant183 | 7159 Pelaw Crescent, Ch... | Rent Invoice | Mr lettings applicant183 ... | 01/06/20... |
| M - 714 | Tenant | lettings applicant183 | 7159 Pelaw Crescent, Ch... | Rent Invoice | Mr lettings applicant183 ... | 01/07/2020 |
| M - 714 | Tenant | lettings applicant183 | 7159 Pelaw Crescent, Ch... | Rent Invoice | Mr lettings applicant183 ... | 01/08/20... |

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Click "Due Date" to sort the records by the date they are due.

The screenshot shows the 'Outstanding Invoices' page with the 'Due Date' column header highlighted by an orange circle. The table now includes additional columns: 'Invoice Amount', 'OS Balance', and 'Unallocated Payment'. The data is sorted by the 'Due Date' column.

| Property | Invoice Type | Description | Due Date | Invoice Amount | OS Balance | Unallocated Payment | |
|--------------|----------------------------|--------------|------------------------------|----------------|------------|---------------------|-----------|
| applicant183 | 7159 Pelaw Crescent, Ch... | Rent Invoice | Mr lettings applicant183 ... | 01/01/2020 | £1,500.00 | £1,500.00 | £1,500.00 |
| applicant183 | 7159 Pelaw Crescent, Ch... | Rent Invoice | Mr lettings applicant183 ... | 01/02/20... | £1,500.00 | £1,500.00 | £1,500.00 |
| applicant183 | 7159 Pelaw Crescent, Ch... | Rent Invoice | Mr lettings applicant183 ... | 01/03/20... | £1,500.00 | £1,500.00 | £1,500.00 |
| applicant183 | 7159 Pelaw Crescent, Ch... | Rent Invoice | Mr lettings applicant183 ... | 01/04/20... | £1,500.00 | £1,500.00 | £1,500.00 |
| applicant183 | 7159 Pelaw Crescent, Ch... | Rent Invoice | Mr lettings applicant183 ... | 01/05/20... | £1,500.00 | £1,500.00 | £1,500.00 |
| applicant183 | 7159 Pelaw Crescent, Ch... | Rent Invoice | Mr lettings applicant183 ... | 01/06/20... | £1,500.00 | £1,500.00 | £1,500.00 |
| applicant183 | 7159 Pelaw Crescent, Ch... | Rent Invoice | Mr lettings applicant183 ... | 01/07/2020 | £1,500.00 | £1,500.00 | £1,500.00 |
| applicant183 | 7159 Pelaw Crescent, Ch... | Rent Invoice | Mr lettings applicant183 ... | 01/08/20... | £1,500.00 | £1,500.00 | £1,500.00 |

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The screen shows all the required detail for an invoice. Details of the Record the invoice is created against, address, invoice type, when due as well as the value of the original invoice and the outstanding balance.

iamproperty My day Lettings Sales Accounts Reporting Communications My account

Outstanding Invoices All All Total Outstanding £ 333, 803.50 Total to Pay £ 0.00

Payment Date: 22/01/2026, Payment Method: Select payment method, Bank Account: Select payment account

| Record | Property | Invoice Type | Description | Due ... ↑ | Invoice Amount | OS Balance | Unallocated | Payment |
|-----------------------|----------------------------|--------------|------------------------------|-------------|----------------|------------|-------------|---------|
| lettings applicant183 | 7159 Pelaw Crescent, Ch... | Rent Invoice | Mr lettings applicant183 ... | 01/01/2020 | £ 1,500.00 | £ 1,500.00 | £ 1,500.00 | |
| lettings applicant183 | 7159 Pelaw Crescent, Ch... | Rent Invoice | Mr lettings applicant183 ... | 01/02/20... | £ 1,500.00 | £ 1,500.00 | £ 1,500.00 | |
| lettings applicant183 | 7159 Pelaw Crescent, Ch... | Rent Invoice | Mr lettings applicant183 ... | 01/03/20... | £ 1,500.00 | £ 1,500.00 | £ 1,500.00 | |
| lettings applicant183 | 7159 Pelaw Crescent, Ch... | Rent Invoice | Mr lettings applicant183 ... | 01/04/20... | £ 1,500.00 | £ 1,500.00 | £ 1,500.00 | |
| lettings applicant183 | 7159 Pelaw Crescent, Ch... | Rent Invoice | Mr lettings applicant183 ... | 01/05/20... | £ 1,500.00 | £ 1,500.00 | £ 1,500.00 | |
| lettings applicant183 | 7159 Pelaw Crescent, Ch... | Rent Invoice | Mr lettings applicant183 ... | 01/06/20... | £ 1,500.00 | £ 1,500.00 | £ 1,500.00 | |
| lettings applicant183 | 7159 Pelaw Crescent, Ch... | Rent Invoice | Mr lettings applicant183 ... | 01/07/2020 | £ 1,500.00 | £ 1,500.00 | £ 1,500.00 | |
| lettings applicant183 | 7159 Pelaw Crescent, Ch... | Rent Invoice | Mr lettings applicant183 ... | 01/08/20... | £ 1,500.00 | £ 1,500.00 | £ 1,500.00 | |
| lettings applicant183 | 7159 Pelaw Crescent, Ch... | Rent Invoice | Mr lettings applicant183 ... | 01/09/20... | £ 1,500.00 | £ 1,500.00 | £ 1,500.00 | |
| lettings applicant183 | 7159 Pelaw Crescent, Ch... | Rent Invoice | Mr lettings applicant183 ... | 01/10/2020 | £ 1,500.00 | £ 1,500.00 | £ 1,500.00 | |

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To collect a payment for invoices from this screen. Click this checkbox and any other invoices you are paying..

iamproperty CRM movebutler My day Lettings Sales Accounts Reporting Communications My account

Outstanding Invoices All All Total Outstanding £ 333, 803.50 Total to Pay

Payment Date: 22/01/2026, Payment Method: Select payment method, Bank Account: Select payment account

| <input type="checkbox"/> | Invoice No. | Record Type | Record | Property | Invoice Type | Description | Due ... ↑ | Invoice Amount | OS |
|--------------------------|-------------|-------------|-----------------------|----------------------------|--------------|------------------------------|-------------|----------------|----|
| <input type="checkbox"/> | CRM - 714 | Tenant | lettings applicant183 | 7159 Pelaw Crescent, Ch... | Rent Invoice | Mr lettings applicant183 ... | 01/01/2020 | £ 1,500.00 | £ |
| <input type="checkbox"/> | CRM - 714 | Tenant | lettings applicant183 | 7159 Pelaw Crescent, Ch... | Rent Invoice | Mr lettings applicant183 ... | 01/02/20... | £ 1,500.00 | £ |
| <input type="checkbox"/> | CRM - 714 | Tenant | lettings applicant183 | 7159 Pelaw Crescent, Ch... | Rent Invoice | Mr lettings applicant183 ... | 01/03/20... | £ 1,500.00 | £ |
| <input type="checkbox"/> | CRM - 714 | Tenant | lettings applicant183 | 7159 Pelaw Crescent, Ch... | Rent Invoice | Mr lettings applicant183 ... | 01/04/20... | £ 1,500.00 | £ |
| <input type="checkbox"/> | CRM - 714 | Tenant | lettings applicant183 | 7159 Pelaw Crescent, Ch... | Rent Invoice | Mr lettings applicant183 ... | 01/05/20... | £ 1,500.00 | £ |
| <input type="checkbox"/> | CRM - 714 | Tenant | lettings applicant183 | 7159 Pelaw Crescent, Ch... | Rent Invoice | Mr lettings applicant183 ... | 01/06/20... | £ 1,500.00 | £ |
| <input type="checkbox"/> | CRM - 714 | Tenant | lettings applicant183 | 7159 Pelaw Crescent, Ch... | Rent Invoice | Mr lettings applicant183 ... | 01/07/2020 | £ 1,500.00 | £ |
| <input type="checkbox"/> | CRM - 714 | Tenant | lettings applicant183 | 7159 Pelaw Crescent, Ch... | Rent Invoice | Mr lettings applicant183 ... | 01/08/20... | £ 1,500.00 | £ |
| <input type="checkbox"/> | CRM - 714 | Tenant | lettings applicant183 | 7159 Pelaw Crescent, Ch... | Rent Invoice | Mr lettings applicant183 ... | 01/09/20... | £ 1,500.00 | £ |

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Only Invoices with an Invoice Amount can be collected e.g those highlighted below

| Invoice No. | Recor... | Record | Property | Invoice Type | Description | Due Date | Invoice Amount | OS Ba |
|-------------|----------|---------------------|------------------------------|--------------------------|-------------------|-------------|----------------|-------|
| | Landlord | | | Agent Fee Invoice | Landlord Pay... | 14/07/2023 | £ 0.00 | |
| CRM - 710 | Landlord | | Norbet House Red Road,... | Landlord Expense Invoice | leaky tap in k... | 19/12/2023 | £ 0.00 | |
| 81 | Tenant | Ian Jones | 82 Oakfield Road, Carter... | Deposit Invoice | Deposit invo... | 23/05/20... | £ 1,500.00 | £ 1, |
| CRM - 352 | Tenant | letting applicant16 | Bedroom 1, 63 Woodlan... | Tenant Fee Invoice | Cleaning | 19/08/2024 | £ 141.00 | |
| CRM - 353 | Landlord | | 44 Barrett Road, Darlingt... | Landlord Expense Invoice | leaking tap | 20/08/20... | £ 0.00 | |
| CRM - 361 | Tenant | Ella Petch | 24 Westgarth Terrace, D... | Service Charge Invoice | Service Char... | 29/08/20... | £ 10.00 | |
| CRM - 372 | Tenant | letting applicant16 | Bedroom 1, 63 Woodlan... | Tenant Fee Invoice | Cleaning | 19/09/2024 | £ 141.00 | £ |
| CRM - 379 | Landlord | | 17 Yew Tree Close, Hurw... | Landlord Expense Invoice | leak | 25/09/20... | £ 0.00 | |
| CRM - 380 | Landlord | | 17 Yew Tree Close, Hurw... | Landlord Expense Invoice | jfgalkdfbdfg... | 25/09/20... | £ 0.00 | £ |
| CRM - 382 | Tenant | Ella Petch | 24 Westgarth Terrace, D... | Tenant Fee Invoice | Test charge | 29/09/20... | £ 10.00 | |

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These invoice types cannot be collected here.

| Invoice No. | Recor... | Record | Property | Invoice Type | Description | Due Date | Invoice Amount | OS Ba |
|-------------|----------|--------|------------------------------|--------------------------|-------------------|-------------|----------------|-------|
| CRM - 710 | Landlord | | Norbet House Red Road,... | Landlord Expense Invoice | leaky tap in k... | 19/12/2023 | £ 0.00 | |
| CRM - 353 | Landlord | | 44 Barrett Road, Darlingt... | Landlord Expense Invoice | leaking tap | 20/08/20... | £ 0.00 | |
| CRM - 379 | Landlord | | 17 Yew Tree Close, Hurw... | Landlord Expense Invoice | leak | 25/09/20... | £ 0.00 | |
| CRM - 380 | Landlord | | 17 Yew Tree Close, Hurw... | Landlord Expense Invoice | jfgalkdfbdfg... | 25/09/20... | £ 0.00 | £ |

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Click **"Select payment method"** from the drop down list select how the payment was made.

The screenshot shows the 'Outstanding Invoices' section of the iamproperty CRM. At the top, there are navigation menus for 'My day', 'Lettings', 'Sales', 'Accounts', 'Reporting', and 'Communications'. The 'Accounts' menu is currently selected. The page displays a summary of 'Outstanding Invoices' with a total outstanding amount of £333,803.50 and a total to pay of £1,500.00. Below the summary, there are filters for 'Payment Date' (22/01/2026), 'Payment Method' (highlighted with an orange circle), and 'Bank Account' (Select payment account). A table of invoices is shown below, with columns for Invoice No., Record Type, Record, Property, Invoice Type, Description, Due date, Invoice Amount, and OS Balan. The first row is selected, showing an invoice for 'Mr lettings applicant183' at '7159 Pelaw Crescent, Ch...' with a due date of 01/01/2020 and an amount of £1,500.00.

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Click **"Select payment account"** select the account the funds were paid into from the list.

The screenshot shows the 'Outstanding Invoices' section of the iamproperty CRM. The 'Payment Method' dropdown menu is now set to 'Bank Transfer'. The 'Bank Account' dropdown menu is highlighted with an orange circle, showing the option 'Select payment account'. The table of invoices remains the same, with the first row selected. The 'OS Balan' column now shows a value of £1,500.00 for the selected invoice.

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Click the "Pay" icon to collect in the payments for all the selected Invoices.

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property My day Lettings Sales Accounts Reporting Communications My account

Outstanding All All Total Outstanding £ 333,803.50 Total to Pay £ 1,500.00

Date 026 Payment Method Bank Transfer Bank Account Morgan& Co Client Account Search 100

| Invoice No. | Record Type | Record | Property | Invoice Type | Description | Due ... ↑ | Invoice Amount | OS Balance |
|-------------|-------------|-----------------------|----------------------------|--------------|------------------------------|-------------|----------------|------------|
| M - 714 | Tenant | lettings applicant183 | 7159 Pelaw Crescent, Ch... | Rent Invoice | Mr lettings applicant183 ... | 01/01/2020 | £ 1,500.00 | £ 1,500.00 |
| M - 714 | Tenant | lettings applicant183 | 7159 Pelaw Crescent, Ch... | Rent Invoice | Mr lettings applicant183 ... | 01/02/20... | £ 1,500.00 | £ 1,500.00 |
| M - 714 | Tenant | lettings applicant183 | 7159 Pelaw Crescent, Ch... | Rent Invoice | Mr lettings applicant183 ... | 01/03/20... | £ 1,500.00 | £ 1,500.00 |
| M - 714 | Tenant | lettings applicant183 | 7159 Pelaw Crescent, Ch... | Rent Invoice | Mr lettings applicant183 ... | 01/04/20... | £ 1,500.00 | £ 1,500.00 |
| M - 714 | Tenant | lettings applicant183 | 7159 Pelaw Crescent, Ch... | Rent Invoice | Mr lettings applicant183 ... | 01/05/20... | £ 1,500.00 | £ 1,500.00 |
| M - 714 | Tenant | lettings applicant183 | 7159 Pelaw Crescent, Ch... | Rent Invoice | Mr lettings applicant183 ... | 01/06/20... | £ 1,500.00 | £ 1,500.00 |
| M - 714 | Tenant | lettings applicant183 | 7159 Pelaw Crescent, Ch... | Rent Invoice | Mr lettings applicant183 ... | 01/07/2020 | £ 1,500.00 | £ 1,500.00 |
| M - 714 | Tenant | lettings applicant183 | 7159 Pelaw Crescent, Ch... | Rent Invoice | Mr lettings applicant183 ... | 01/08/20... | £ 1,500.00 | £ 1,500.00 |