

Using Rent Invoicing in iamproperty CRM



Learn how to navigate the iamproperty CRM dashboard to locate and manage Commercial property rent invoicing. This guide provides a simple walk-through to help you effectively invoice your commercial properties.

This will allow you to send Rent Invoices to Commercial customers quickly and easily.



Tip! Rent Invoicing may need enabling before use, instructions are below. Alternatively contact crm.support@iamproperty.com and request it is setup for you.

1

To enable Rent Invoicing, navigate to the CRM Accounts configuration menu, this can be accessed from either the 'cog' icon at the bottom left corner of the accounts screen or from the CRM configuration menu in the 'Control Panel'. Either way navigate to the accounts section and select **"Use Rent Invoicing"**

The screenshot shows the 'Accounts' configuration page in the iamproperty CRM. The left sidebar contains a 'Configuration' section with a 'Branch' dropdown set to 'Morgan & Co'. Below this are links for 'General', 'News Feed', 'Accounts', 'Module Settings', 'Lettings', 'Activity List', and 'Inspections'. The main content area displays various settings for the selected branch. The 'Use Rent Invoicing' toggle switch is highlighted with an orange circle. Other settings include 'Primary VAT Rate (%)' at 20, 'Secondary VAT Rate (%)' at 5, 'Stop Rent Due on Tenancy End Date' (disabled), 'Auto Assign Rent Invoice No.' (disabled), 'Rent Invoice Period' at 30, 'Invoice Seed No. per Branch' (disabled), 'Invoice No. Seed' at 759, 'Invoice No. Seed Prefix' as 'CRM -', 'Expense Job No. per Branch' (disabled), and 'Expense Job No. Seed' at 535.

Setting	Value
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	759
Invoice No. Seed Prefix	CRM -
Expense Job No. per Branch	☐
Expense Job No. Seed	535

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

The screenshot shows the 'iamproperty' CRM interface. The top navigation bar includes 'My day', 'Lettings', 'Sales', 'Accounts', 'Reporting', and 'Communications'. A search bar is present on the right. The main heading is 'Welcome back, Training'. Below this are three buttons: '+ Add New Record', 'View property management', and 'Visit help centre'. A search bar for 'Search all records' is located below the buttons. The dashboard is divided into two main sections: 'Today's events' and 'My tasks'.

Today's events

Time	Name
08:00	Jemmas 8-4,30
12:00	Test test

My tasks

Status	Name	Priority	Start date	Due date
Not Started	Call Audrey	High	08/Oct/2025	08/Oct/2025
Not Started	test	High	24/Oct/2025	24/Oct/2025
Not Started	Visit	High	28/Oct/2025	28/Oct/2025
Not Started	title	High	29/Oct/2025	29/Oct/2025

3 From the My Day screen navigate to the property you want to create commercial rent invoices for.

The easiest way is to use the search icon.

This screenshot shows the top navigation bar of the CRM system. It includes tabs for 'iamproperty', 'CRM', 'movebutler', and 'iamsold'. Below these are links for 'Reporting' and 'Communications'. A search icon (magnifying glass) is highlighted with a red circle. To the right of the search icon is a 'My account' button. The background of the page is partially visible, showing the 'Welcome back, Training' heading and the 'Visit help centre' link.

4

Once in the Property Record, on the Details screen (the first screen you land on) scroll down to below the property images and select the **'Commercial'** toggle to enable the feature for the property. Then click 'Save'.

The image displays two screenshots of the 'Property Record Details' screen, illustrating the steps to enable the 'Commercial' feature.

Top Screenshot: The 'COMMERCIAL' toggle is currently turned off (grey). The 'SCHEDULED MANAGEMENT FEE' section shows a 'Charge When Vacant' toggle that is also turned off.

Bottom Screenshot: The 'COMMERCIAL' toggle is now turned on (blue). The 'SCHEDULED MANAGEMENT FEE' section shows the 'Charge When Vacant' toggle is now turned on. A 'Save Changes' button is visible at the bottom right of the 'SCHEDULED MANAGEMENT FEE' section.

Form Fields and Values:

- Property Images:** No pictures available. Please click the button to add.
- COMMERCIAL:**
 - Commercial Unit: [Empty]
 - Exempt: ☒ Rent amount is exempt from VAT
 - Inclusive: ☐ Rent amount is inclusive of VAT
 - Exclusive: ☐ Rent amount is exclusive of VAT
- OTHER:**
 - [Empty]
 - Enter Code: [Empty]
- Management Options:**
 - Fully managed: This property is fully managed by us
 - Rent collect: We collect rent for this property
 - Let only: We only let this property
- Financials:**
 - Management Fee: £ 9
 - Upfront Letting Fee: £ 450
 - Regular Letting Fee: £ 1
 - Authorised Expense Amount: £ 0.00
 - Estimated Rental Value: £ 0.00
- Agreement Name:** [Empty]
- Scheduled Management Fee:**
 - Amount: £ 0.00
 - Next Fee Date: [Empty]
 - Charge Frequency: [Dropdown]
 - Charge When Vacant: ☐

5 Click "View tenants"

The screenshot shows the iamproperty CRM dashboard. At the top, there's a navigation bar with links for 'My day', 'Lettings', 'Sales', 'Accounts', 'Reporting', and 'Communications'. Below this, a secondary bar contains 'Lead landlord: Lettings Landlord...' and 'Lead tenant: Mr Sales Applica...'. The 'View Tenants' button is highlighted with an orange circle. Below the navigation bar, there are filters for 'Reference:', 'Negotiator: Training Dave', 'Branch: Morgan & Co', and 'Status: Let Out'. The main content area is divided into two sections: 'PROPERTY PICTURES' and 'Property Address'. The 'PROPERTY PICTURES' section includes a table with energy ratings and a 'Current'/'Potential' status. The 'Property Address' section has a 'Postcode' field with 'DH2 2HX'. The 'Property Information' section includes 'Fully managed', 'Rent collect', and 'Let only' options.

Score	Energy rating	Current	Potential
92+	A		
81-91	B	85 B	88 B
69-80	C		
55-68	D		
39-54	E		
21-38	F		

6 Click onto the Tenant name e.g. "Mr Sales Applicant12"

The screenshot shows a 'Tenants' modal window. At the top, there are 'EMAIL ALL' and 'SMS ALL' buttons. Below these, a tenant's name 'Mr Sales Applicant12' is displayed, along with their email 'zags.dave@gmail.com' and phone number 'sms 077812458452'. A blue star icon is next to the phone number. At the bottom, there are 'Cancel' and 'View Tenancy' buttons. The background shows a blurred view of the property energy rating table.

7 In the Rent Period field, click and from the drop down menu select "**Commercial**"

£ 1200.00
Commercial
22 May 2026
£3,600.00
01/03/2026
52

SA Mr Sales Applicant12
zagg.dave@gmail.com
077812458452

TE AP Warning Set GDPR Periodic Tenancy Tenancy→

90888 Pelaw Crescent, Chester le Street Primary Tenant

Reference: Negotiator: Training Dave Branch: Morgan & Co Status: Live - Periodic

Tenant Rent Details

Rent £ 1200.00	Deposit 1000.00	Holding Deposit 276.92	Collection Day Same Day	Next Rent Due 22/05/2026
-----------------------------	---------------------------	----------------------------------	-----------------------------------	------------------------------------

Rent Period
Commercial

8 Click onto 'Rent Type' and click "**Commercial**"

£ 1200.00
Commercial
22 May 2026
£3,600.00
01/03/2026
52

Commercial

Personal Information

Title Mr	Forename Sales
Surname Applicant12	Company Name
Website	Phone Number 077812458452
Work phone	Mobile phone 077812458452
Email Address zagg.dave@gmail.com	Salutation
☐ Tenant doesn't have an email address	Source Advert
Date of Birth	Age

Additional Information

Occupation	Employer
NI Number	Agreement Name Applicant12
Rent Review	Rent Type Standard (AST)
Automatically Rent Inv.	Commercial
Housing Benefit	Ground
£ Hb charged ahead Check this if the HB Rent Charge in Ahead Method.	Standard (AST)
	Hb charged arrears Check this if the HB Rent Charge in Arrears Method.

9

Click here to turn on the **'Automatically Rent Invoice'** option
Click here to **Save**.

£ 1200.00

Commercial

22 May 2026

£3,600.00

01/03/2026

52

Commercial

Personal Information

Title
Mr

Forename
Sales

Surname
Applicant12

Company Name

Website

Phone Number
077812458452

Work phone

Mobile phone
077812458452

Email Address
zagg.dave@gmail.com

Salutation

☐ Tenant doesn't have an email address

Source
Advert

Date of Birth

Age

Additional Information

Occupation

Employer

NI Number

Agreement Name
Applicant12

Rent Review

Rent Type
Commercial

Automatically Rent Inv.

Use Alternate Address

Housing Benefit

Case Number

£

Hb charged ahead

Check this if the HB Rent Charge in Ahead Method.

£

Hb charged arrears

Check this if the HB Rent Charge in Arrears Method.

£ 1200.00

Commercial

22 May 2026

£3,600.00

01/03/2026

52

Commercial

Personal Information

Title
Mr

Forename
Sales

Surname
Applicant12

Company Name

Website

Phone Number
077812458452

Work phone

Mobile phone
077812458452

Email Address
zagg.dave@gmail.com

Salutation

☐ Tenant doesn't have an email address

Source
Advert

Date of Birth

Age

Additional Information

Occupation

Employer

NI Number

Agreement Name
Applicant12

Rent Review

Rent Type
Commercial

Automatically Rent Inv.

Use Alternate Address

Housing Benefit

Case Number

£

Hb charged ahead

Check this if the HB Rent Charge in Ahead Method.

£

Hb charged arrears

Check this if the HB Rent Charge in Arrears Method.

Creating the Invoice

6

10 Click "Accounts"

The screenshot shows the iamproperty CRM dashboard. The top navigation bar includes 'My day', 'Lettings', 'Sales', 'Accounts' (highlighted with an orange circle), 'Reporting', and 'Communications'. The left sidebar contains a list of menu items: 'Live Jobs', 'EPC Rating', 'Details', 'Checklist', 'Appraisals', 'Inspections', 'Accounts' (with a right arrow), 'Compliance', 'Information', and 'maintenance' (with a right arrow). The main content area is titled 'No pictures available' with a 'Start' button. Below this, the 'COMMERCIAL' section is visible, featuring a 'Commercial Unit' toggle and three options: 'Exempt' (checked), 'Inclusive', and 'Exclusive'. On the right, there are three service cards: 'Fully managed', 'Rent collect', and 'Let only'. Below these are several input fields for fees: 'Management Fee' (£9), 'Upfront Letting Fee' (£450), 'Regular Letting Fee' (£1), 'Authorised Expense Amount' (£0.00), and 'Estimated Rental Value' (£0.00). An 'Agreement Name' field contains 'David-George Morgan, Eve Harmon'. At the bottom right, a 'Scheduled Management Fee' section is partially visible.

11 Click "Accounts dashboard"

This screenshot shows the same iamproperty CRM dashboard as the previous one, but with the 'Accounts dashboard' option in the left sidebar highlighted with an orange box. The top navigation bar and the main content area remain the same. The 'Accounts dashboard' option is located under the 'Accounts' menu item in the sidebar.

12 On the 'Invoices' tile, click the three line menu.

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 selected and shows a date range of '23/03/2026 - 20/04/2026'. It lists three types of invoices: 'Rent Invoice', 'Tenant Fee Invoice', and 'Service Charge Invoice'. Each invoice type has a 'View All' link. A three-line menu icon (hamburger menu) is circled in orange in the top right corner of the 'Invoices' tile.

13 Click "Rent Invoicing"

This screenshot shows the same iamproperty CRM dashboard as the previous one, but with the 'Rent Invoicing' option highlighted in the dropdown menu that appears when the three-line menu icon is clicked. The dropdown menu includes the following options: 'View All Invoices', 'View Rent Guarantee', 'New Invoice', 'New Credit Note', 'Import', 'Rent Invoicing' (highlighted), 'Charge Landlord Fee', 'Service Charges', and 'Pay Tenant Invoices'. The 'Invoices' tile still shows the same date range and invoice types as before.

14

Click **"Email Templates"** and select the template you have created or create new template. If you are sending the invoice via SMS select an SMS template as well.

To learn how to create a template [click here](#)

iam property My day Lettings Sales Accounts Reporting Communications

Rent Invoicing

Email Template: Rent Invoicing (highlighted with orange box) | SMS Template: Select SMS template

☐	Tenant	Property	Invoice Date	Date Due	Amount Due	Email	Mobile
☐	Sales Applicant12	90888 Pelaw Crescent, ...	22/04/2026	22/05/2026	£ 1,200.00	zagg.dave@gmail.com	07781...

15

The available invoices will show on the screen. You will be able to see if the email has been sent, when and by who.

iam property My day Lettings Sales Accounts Reporting Communications

Rent Invoicing

Email Template: Rent Invoicing (highlighted with orange box) | SMS Template: Select SMS template

☐	Tenant	Property	Invoice Date	Date Due	Amount Due	Email	Mobile
☐	Sales Applicant12	90888 Pelaw Crescent, ...	22/04/2026	22/05/2026	£ 1,200.00	zagg.dave@gmail.com	07781...

[Sales](#)
[Accounts](#)
[Reporting](#)
[Communications](#)

Total £1,200.00
Total Selected £0.00

Search

	Email Sent	Date Email Sent	Email Sent By	SMS Sent	Date SMS Sent	SMS Sent By
'812458452	X			X		

1 to 1 of 1 Page 1 of 1

16 Select the invoice(s) you are sending



[My day](#)
[Lettings ▾](#)
[Sales ▾](#)
[Accounts ▾](#)
[Reporting ▾](#)
[Communications ▾](#)

Rent Invoicing

Email Template

Rent Invoicing ▾ + ✎

SMS Template

Select SMS template ▾ + ✎




☐ Tenant	Property	Invoice Date	Date Due	Amount Due	Email	Mobile
☐ Sales Applicant12	90888 Pelaw Crescent, ...	22/04/2026	22/05/2026	£ 1,200.00	zagg.dave@gmail.com	07781...

17 Click the **'Send Email'** or **'Send SMS'** icon.

The screenshot shows the 'Rent Invoicing' interface. At the top, there's a navigation bar with 'iam property' logo and tabs: 'My day', 'Lettings', 'Sales', 'Accounts', 'Reporting', and 'Communications'. Below this, the 'Rent Invoicing' section has two dropdown menus: 'Email Template' (set to 'Rent Invoicing') and 'SMS Template' (set to 'Select SMS template'). To the right of these is a 'Send Email' icon, which is highlighted with an orange circle. Below the templates is a table with columns: 'Tenant', 'Property', 'Invoice Date', 'Date Due', 'Amount Due', 'Email', and 'Mobile'. The table contains one row for 'Sales Applicant12' with a due date of '22/05/2026' and an amount of '£ 1,200.00'.

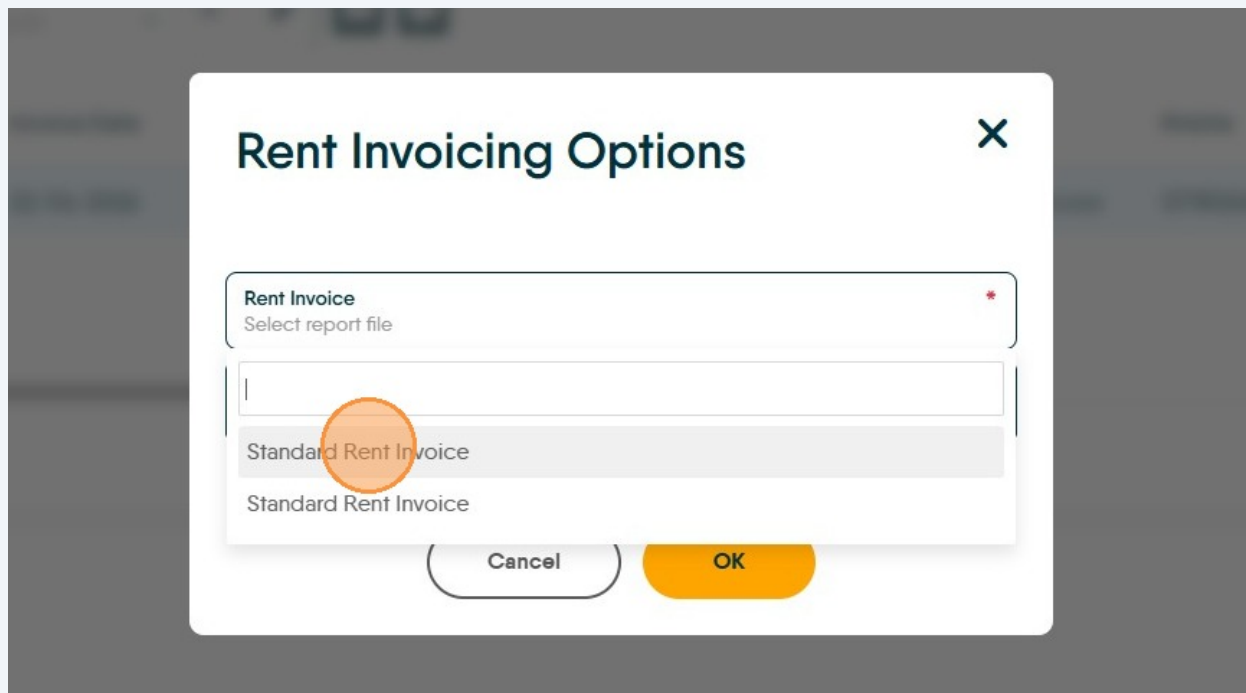
Tenant	Property	Invoice Date	Date Due	Amount Due	Email	Mobile
✓ Sales Applicant12	90888 Pelaw Crescent, ...	22/04/2026	22/05/2026	£ 1,200.00	zagg.dave@gmail.com	077812458452

18 From the **"Rent Invoice"** menu select the type of invoice you are sending.

The screenshot shows a 'Rent Invoicing Options' dialog box. It has a title bar with a close button (X). Inside, there's a dropdown menu labeled 'Rent Invoice' with the text 'Select report file' below it. This dropdown is highlighted with an orange circle. Below the dropdown is a 'Download Copy' toggle switch, which is currently turned off. At the bottom of the dialog are two buttons: 'Cancel' and 'OK'.

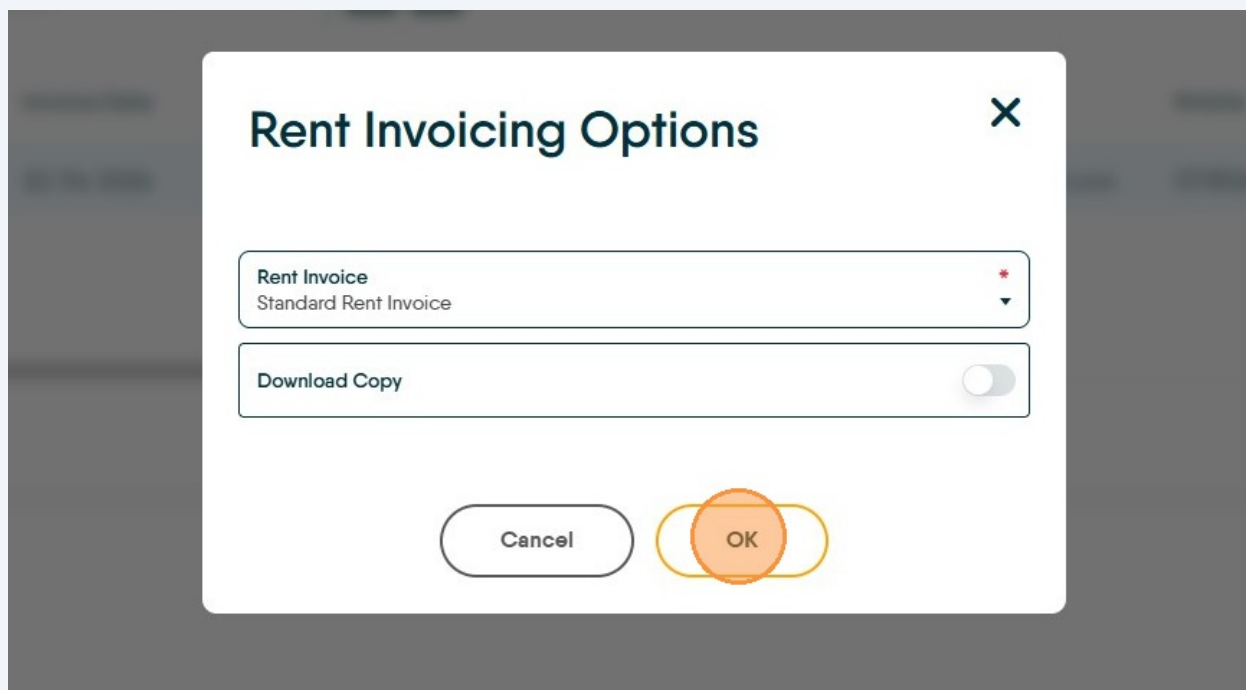
19

The default option added to your account will be **"Standard Rent Invoice"** if a different invoice style is required please contact support to discuss your requirements.



20

Click **"OK"**



21

You will see a screen indicating how many invoices are being sent and counting down as they are sent.