

Configuring and Using Rent Guarantee



This guide explains how to enable and use the Rent Guarantee feature on iampropertyCRM.

How to activate it per property and set end dates, plus fund and manage the dedicated Rent Guarantee account so you never use client funds. It also shows viewing/paying guarantee invoices and how those payments flow into normal landlord payouts, ensuring correct accounting, compliance and a smooth overdue-rent process.

Enable 'Rent Guarantee' Feature

1

Enabling the 'Rent Guarantee' feature allows the feature to be enabled for all branches at the same time, named as 'Rent Guarantee'.

Once enabled for the Branch the 'Rent Guarantee' feature can be enabled in each property record individually.

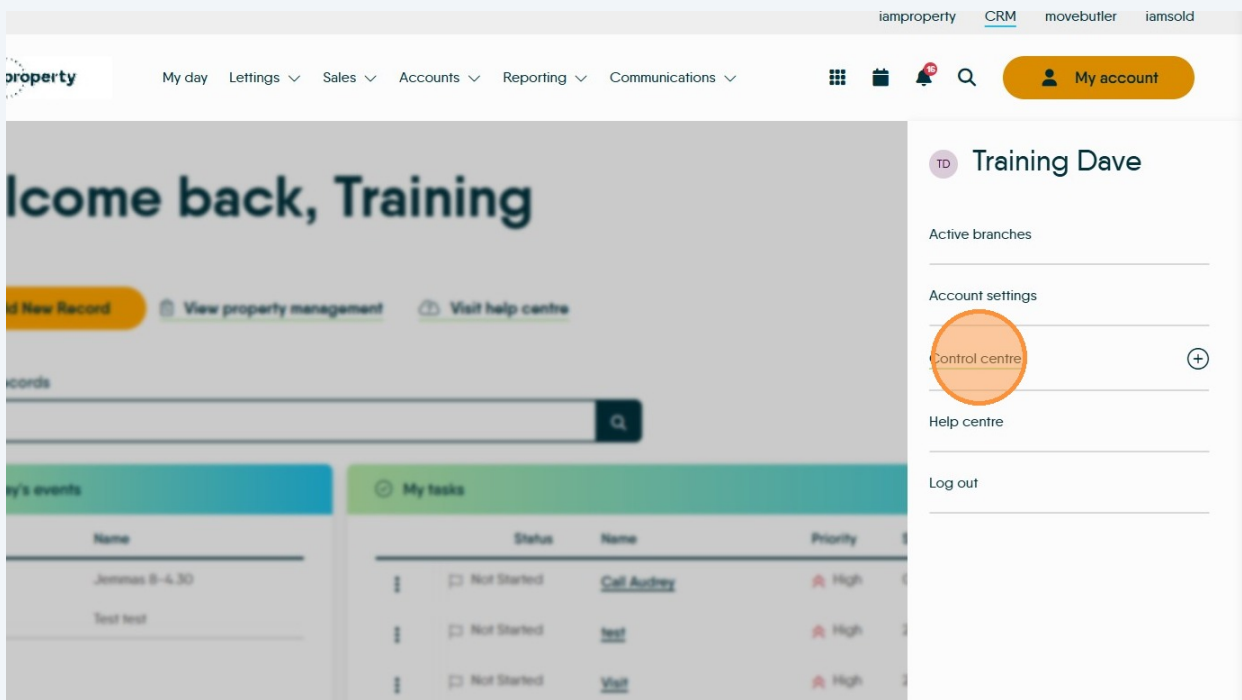
2

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

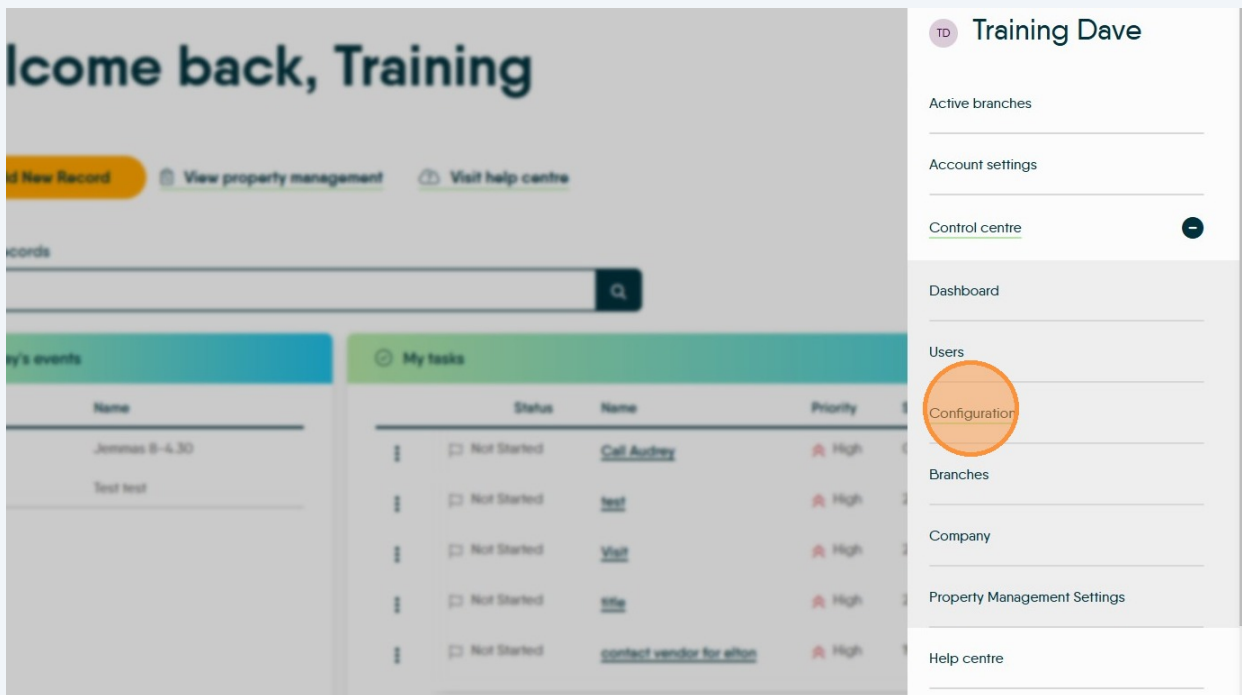
The screenshot shows the 'iam property' CRM interface. The top navigation bar includes 'My day', 'Lettings', 'Sales', 'Accounts', 'Reporting', and 'Communications'. The main content area displays a 'Welcome back, Training' message and a search bar. Below the search bar, there are two sections: 'Today's events' and 'My tasks'. The 'My tasks' section shows a list of tasks with columns for Status, Name, and Priority.

Status	Name	Priority
<input type="checkbox"/> Not Started	Call Aubrey	High
<input type="checkbox"/> Not Started	test	High
<input type="checkbox"/> Not Started	Visit	High
<input type="checkbox"/> Not Started	Site	High

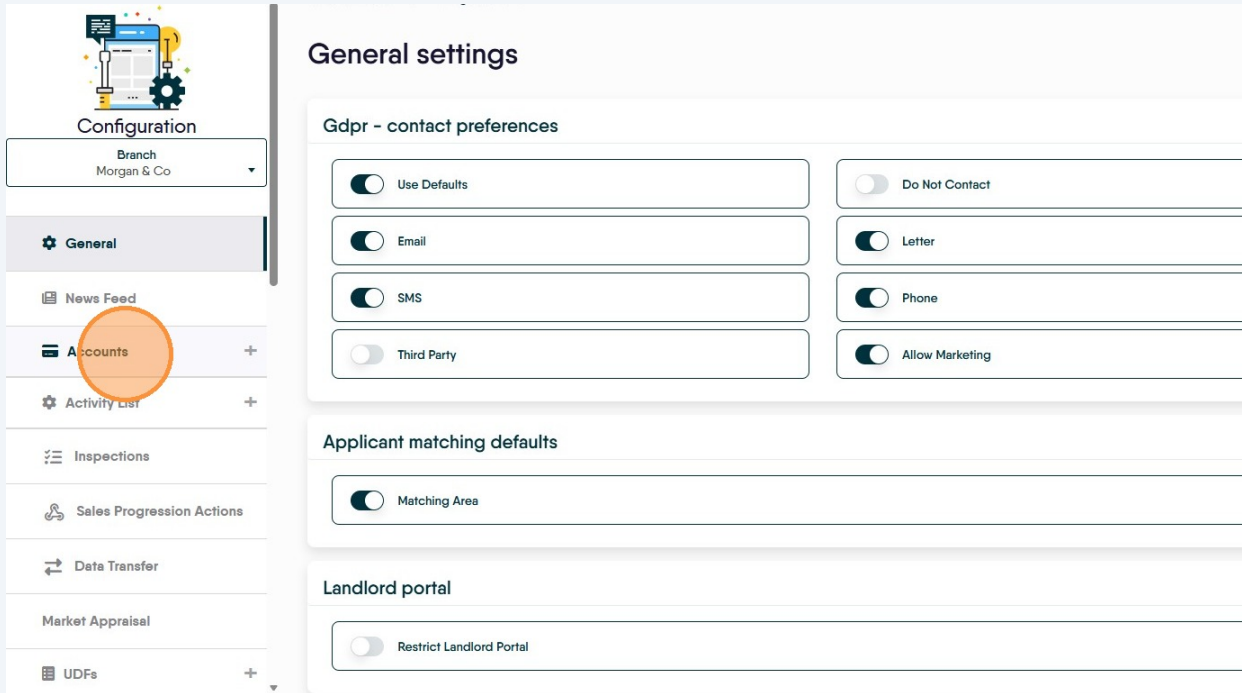
3 Click "Control centre"



4 Click "Configuration"



5 Click "Accounts"



The screenshot shows the 'Configuration' page for 'Branch Morgan & Co'. The left sidebar contains a menu with the following items: General, News Feed, Accounts (highlighted with an orange circle), Activity List, Inspections, Sales Progression Actions, Data Transfer, Market Appraisal, and UDFs. The main content area is titled 'General settings' and contains three sections: 'Gdpr - contact preferences', 'Applicant matching defaults', and 'Landlord portal'. Each section contains several toggle switches.

Configuration
Branch Morgan & Co

General settings

Gdpr - contact preferences

- Use Defaults
- Email
- SMS
- Third Party
- Do Not Contact
- Letter
- Phone
- Allow Marketing

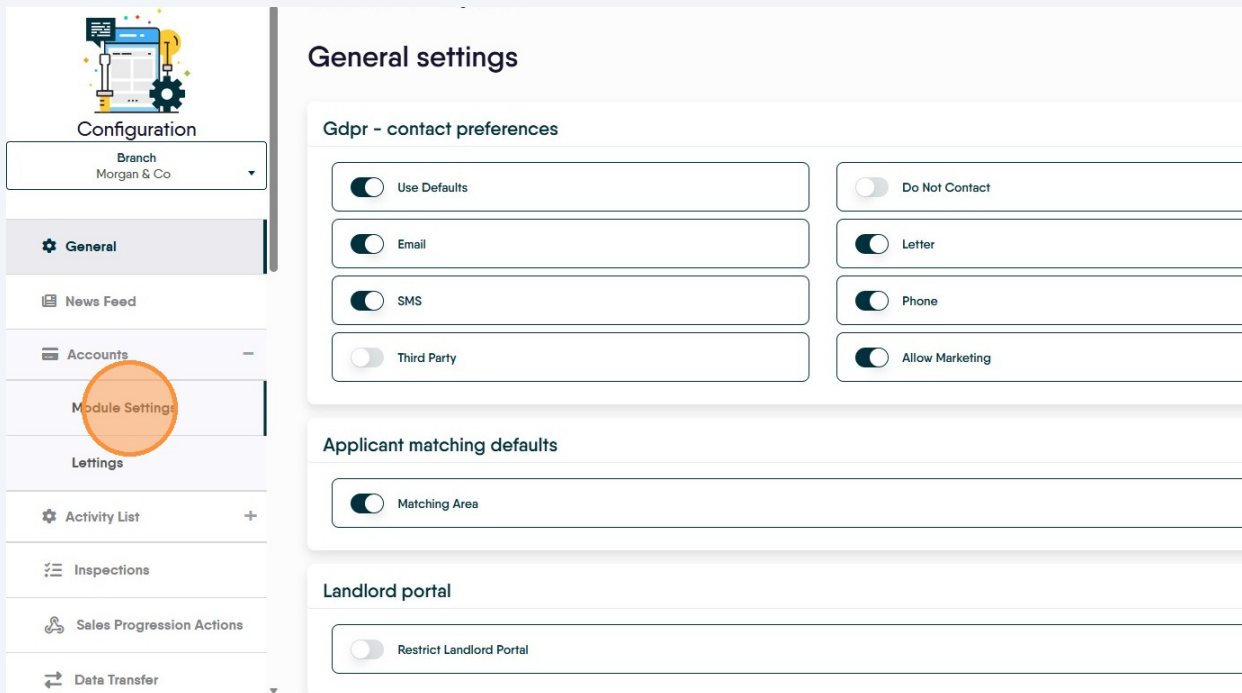
Applicant matching defaults

- Matching Area

Landlord portal

- Restrict Landlord Portal

6 Click "Module settings"



The screenshot shows the 'Configuration' page for 'Branch Morgan & Co'. The left sidebar contains a menu with the following items: General, News Feed, Accounts, Module Settings (highlighted with an orange circle), Lettings, Activity List, Inspections, Sales Progression Actions, and Data Transfer. The main content area is titled 'General settings' and contains three sections: 'Gdpr - contact preferences', 'Applicant matching defaults', and 'Landlord portal'. Each section contains several toggle switches.

Configuration
Branch Morgan & Co

General settings

Gdpr - contact preferences

- Use Defaults
- Email
- SMS
- Third Party
- Do Not Contact
- Letter
- Phone
- Allow Marketing

Applicant matching defaults

- Matching Area

Landlord portal

- Restrict Landlord Portal

7 Click here to **enable the 'Rent Guarantee'** feature across all your branches.

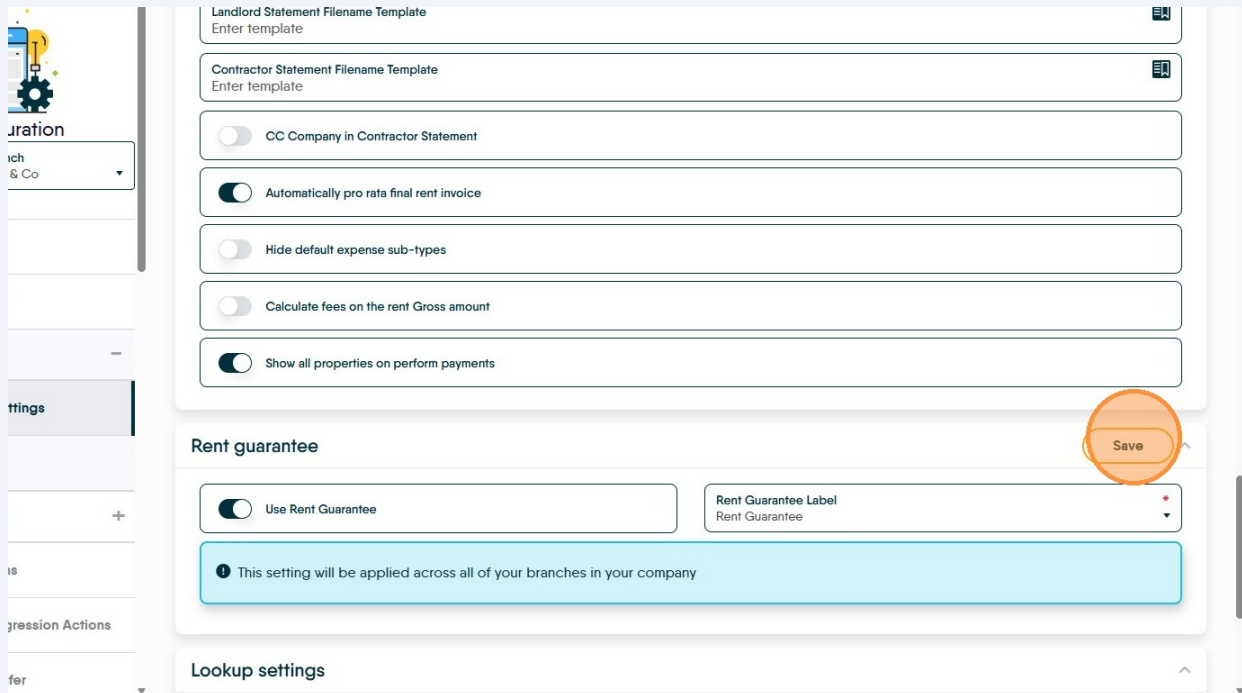
The screenshot shows a configuration interface for a branch named 'Morgan & Co'. The left sidebar contains a 'Configuration' menu with options: General, News Feed, Accounts, Module Settings (highlighted), Lettings, Activity List, Inspections, Sales Progression Actions, and Data Transfer. The main content area is divided into sections: 'Landlord Statement Filename Template', 'Contractor Statement Filename Template', and 'Rent guarantee'. The 'Rent guarantee' section has a toggle for 'Use Rent Guarantee' which is highlighted with an orange circle. To its right is a dropdown menu for 'Rent Guarantee Label' set to 'Rent Guarantee'. Below this is a light blue information box stating: 'This setting will be applied across all of your branches in your company'. Other settings include 'CC Company in Contractor Statement', 'Automatically pro rata final rent invoice', 'Hide default expense sub-types', 'Calculate fees on the rent Gross amount', and 'Show all properties on perform payments'.

8 Leave "**Rent Guarantee Label**" set to "**Rent Guarantee**"

Please leave Rent Guarantee as the selected option.

This screenshot is similar to the previous one, showing the same configuration page. The 'Rent guarantee' section is visible, with the 'Use Rent Guarantee' toggle selected. The 'Rent Guarantee Label' dropdown menu is highlighted with an orange circle, showing 'Rent Guarantee' as the selected option. A yellow 'Save' button is visible in the top right corner of the 'Rent guarantee' section. The information box below the dropdown remains: 'This setting will be applied across all of your branches in your company'. The rest of the page layout and other settings are identical to the previous screenshot.

9 Click "Save"



The screenshot shows a settings interface with a left-hand navigation menu and a main content area. The main content area is divided into several sections:

- Landlord Statement Filename Template**: Enter template
- Contractor Statement Filename Template**: 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

The **Rent guarantee** section is highlighted with a blue background and contains:

- Use Rent Guarantee
- Rent Guarantee Label: Rent Guarantee

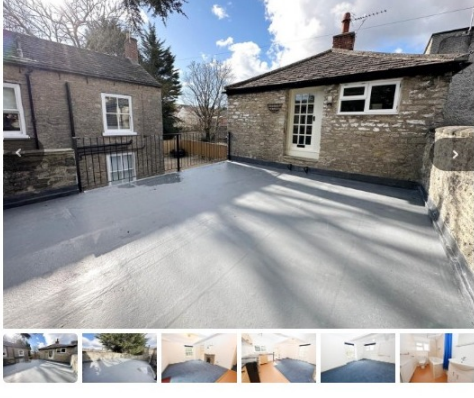
A light blue information box below the Rent Guarantee section states: "This setting will be applied across all of your branches in your company". An orange circle highlights the "Save" button in the top right corner of the Rent guarantee section.

The left-hand navigation menu includes sections for "Integration", "Settings", and "Lookup settings".

Enabling a Property For Rent Guarantee

- 10** **Navigate to the Property Record** that has 'Rent Guarantee' and scroll down to the 'Other' section and enable the 'Rent Guarantee' toggle for that property. Rent Guarantee does not need to be enabled for every property, just for any property covered by a Rent Guarantee insurance.

0
B



Property Information

- Fully managed** ✓
This property is fully managed by us
- Rent collect** £
We collect rent for this property
- Let only** 📣
We only let this property

Management Fee: 10 £ %

Upfront Letting Fee: £ 850 £ %

Regular Letting Fee: £ 0 £ %

Authorised Expense Amount: £ 0.00 Estimated Rental Value: £ 0.00

Agreement Name: ✂

Scheduled Management Fee ⓘ

COMMERCIAL

Commercial Unit

- Exempt**
Rent amount is exempt from VAT
- Inclusive** ✓
Rent amount is inclusive of VAT
- Exclusive**
Rent amount is exclusive of VAT

Live Jobs 0

EPC Rating B

- Details
- Checklist
- Appraisals
- Inspections
- Accounts >
- Compliance
- Information
- maintenance >
- Payment
- Marketing
- Key Control

Exempt
Rent amount is exempt from VAT

Inclusive
Rent amount is inclusive of VAT

Exclusive
Rent amount is exclusive of VAT

Scheduled Management Fee ⓘ

Amount: £ 0.00 Next Fee Date

Charge Frequency: ▾ Charge When Vacant

OTHER

Alarmed Entry Code

Requires HMO Licence HMO Expiry Date

Use Rent Guarantee

Landlord Insurance Landlord Insurance Renewal Date

User Defined Fields

Gas confirmed Estate Name Property Manager

11 Click the "Rent Guarantee End Date" field.

The screenshot shows a software interface with a sidebar on the left containing menu items: Live Jobs, EPC Rating, Details, Checklist, Appraisals, Inspections, Accounts, Compliance, Information, maintenance, Payment, Marketing, and Key Control. The main content area is divided into sections: 'Exempt', 'Inclusive', and 'Exclusive' VAT options; an 'OTHER' section with toggle switches for 'Alarmed', 'Requires HMO Licence', 'Use Rent Guarantee', and 'Landlord Insurance', along with input fields for 'Entry Code', 'HMO Expiry Date', 'Rent Guarantee End Date', and 'Landlord Insurance Renewal Date'; and a 'User Defined Fields' section with 'Gas confirmed', 'Estate Name', and 'Property Manager' fields. A 'Scheduled Management Fee' section is also visible on the right. The 'Rent Guarantee End Date' field is highlighted with an orange circle.

12 Use the 'date picker' to select the date that the rent guarantee ends.

This screenshot is a close-up of the 'Rent Guarantee End Date' field. It shows a date picker calendar with a grid of dates. An orange box highlights the calendar, and an orange arrow points from the 'Rent Guarantee End Date' label to the date '02/02/2026' displayed in the field. To the right, there are controls for 'Charge Frequency' (a dropdown menu) and 'Charge When Vacant' (a toggle switch). At the bottom of the interface, there are 'Estate Name' and 'Property Manager' input fields, and a 'Save Changes' button with a lock icon, which is also highlighted with an orange circle.



An end date does not need to be set for Rent Guarantee, if no end date is set then the process will run until ended by yourselves, if an end date is set then the rent guarantee invoices will stop being created on the specified date and normal rent invoices will be created from then onwards.

Managing Rent Guarantee Payments via CRM Accounts

13 Click "Accounts"

The screenshot shows the 'iamproperty' CRM interface. The 'Accounts' menu item is circled in orange. The main content area displays the following sections:

- VAT Options:** Three cards for 'Exempt' (Rent amount is exempt from VAT), 'Inclusive' (Rent amount is inclusive of VAT, selected with a checkmark), and 'Exclusive' (Rent amount is exclusive of VAT).
- OTHER:** A section containing several toggle switches and date fields:
 - Alarmed (toggle off)
 - Requires HMO Licence (toggle off)
 - Use Rent Guarantee (toggle on)
 - Landlord Insurance (toggle off)
 - Entry Code (text field)
 - HMO Expiry Date (text field)
 - Rent Guarantee End Date (02/02/2026, with an information icon)
 - Landlord Insurance Renewal Date (text field)
- Scheduled Management Fee:** A section with fields for:
 - Amount (£ 0.00)
 - Next Fee Date (text field)
 - Charge Frequency (dropdown menu)
 - Charge When Vacant (text field)

14

In the Accounts tile there will be a new section named 'Rent Guarantee Account' if you cant see it straight away scroll down the tile.

iamproperty CRM movebutler iam

My day Lettings Sales Accounts Reporting Communications My account

Accounts

Morgan & Co Client Account
01-02-03 01234567

Balance	£ 488,489.61	Reconciled	£ 472,900.93
Unallocated Funds	£ 29,588.68	Unreconciled	£ 15,588.68

Morgan & Co Held Deposits
01-02-03 45685263

Balance	£ 14,354.84	Reconciled	£ 14,354.84
Unallocated Funds	£ 0.00	Unreconciled	£ 0.00

Invoices

16/01/2026 - 13/02/2026

Rent Invoice

Total Due	£ 44,525.00	£ 17,150.00	£ 4,050.00	£ 23,325.00
		Paid	Due	Overdue

Tenant Fee Invoice

Total Due	£ 161.00	£ 0.00	£ 0.00	£ 161.00
		Paid	Due	Overdue

Deposit Invoice

Total Due	£ 2,769.23	£ 1,500.00	£ 0.00	£ 1,269.23
		Paid	Due	Overdue

Service Charge Invoice

Balance Sheet

Assets	£ 556,778.51	Liabilities	£ 556,778.51
--------	--------------	-------------	--------------

Wilton Branch Client Account £ 12,671.65

Expenses

01/11/2025 - 13/02/2026

Total £ 226.8

iamproperty CRM movebutler iam

My day Lettings Sales Accounts Reporting Communications My account

Accounts

Rent Guarantee Account

Balance	£ 0.00
---------	--------

Cash accounts

Morgan & Co (Cash)	Reconciled:	Unreconciled:	Unallocated:	Total:
--------------------	-------------	---------------	--------------	--------

Invoices

16/01/2026 - 13/02/2026

Rent Invoice

Total Due	£ 44,525.00	£ 17,150.00	£ 4,050.00	£ 23,325.00
		Paid	Due	Overdue

Tenant Fee Invoice

Total Due	£ 161.00	£ 0.00	£ 0.00	£ 161.00
		Paid	Due	Overdue

Deposit Invoice

Total Due	£ 2,769.23	£ 1,500.00	£ 0.00	£ 1,269.23
		Paid	Due	Overdue

Service Charge Invoice

Balance Sheet

Assets	£ 556,778.51	Liabilities	£ 556,778.51
--------	--------------	-------------	--------------

Wilton Branch Client Account £ 12,671.65

Expenses

01/11/2025 - 13/02/2026

Total

15 With Rent Guarantee, runs in its own account named - Rent Guarantee.

You can't run Rent Guarantee from your client account because you can't use client funds to pay the rent money to the landlord. So you have to have a separate account.

When you first turn Rent Guarantee on, obviously the balance there is going to be £0, so you're going to need an initial deposit of money in there to be used to pay the guaranteed rents to your Landlords . That money will come from your business account and will, effectively, finance the (rent guarantee) rent payments that they use to cover their rent payments.

16 Click here this will open the 'Rent Guarantee Deposit/Withdraw' screen.

The screenshot displays the iamproperty CRM interface. The top navigation bar includes 'iamproperty', 'CRM', and 'movebutler'. The main menu has 'My day', 'Lettings', 'Sales', 'Accounts', 'Reporting', and 'Communications'. The 'Accounts' section is active, showing a 'Rent Guarantee Account' with a balance of £0.00. A 'Deposit/Withdraw' button is circled in orange. To the right, the 'Invoices' section shows a date range of 16/01/2026 - 13/02/2026 and lists three invoices: 'Rent Invoice' (Total Due £44,525.00, Paid £17,150.00, Due £4,050.00, Overdue £23,325.00), 'Tenant Fee Invoice' (Total Due £161.00, Paid £0.00, Due £0.00, Overdue £161.00), and 'Deposit Invoice' (Total Due £2,769.23, Paid £1,500.00, Due £0.00, Overdue £1,269.23). Below the accounts, the 'Balance Sheet' shows Assets of £556,778.51 and Liabilities of £556,778.51. The 'Expenses' section shows a date range of 01/11/2025 - 13/02/2026 and a total of £2,000.00.

17

Click the "**Available Balance**" field. This is the amount of money you have set aside from your business account, for the payment of guaranteed rents.

The screenshot shows a modal window titled "Rent Guarantee Deposit/Withdraw" with a close button (X) in the top right corner. The form contains several input fields: "Available Balance" (displaying £ 0.00 and highlighted with an orange border), "Transaction Type" (a dropdown menu showing "Deposit"), "Transaction Date" (displaying 13/02/2026), "Amount" (displaying £ 0.00), "Bank Ref." (with placeholder text "Enter Bank Ref."), "Cheque No." (with placeholder text "Enter Cheque No."), and "Description" (with placeholder text "Enter Description"). At the bottom of the form are two buttons: "Cancel" and "Confirm".

18

To add money to the account, decide the sum you are transferring to the Rent Guarantee account. Click the "**Amount**" field and type the amount e.g. 5000.

The screenshot shows the same "Rent Guarantee Deposit/Withdraw" modal window. In this view, the "Amount" field (displaying £ 0.00) is highlighted with an orange circle. All other fields and the "Cancel" and "Confirm" buttons remain the same as in the previous screenshot.

19

Click the **"Description"** field. For example type "Initial Deposit for Rent on Time Account"

The screenshot shows a modal form titled "Rent Guarantee Deposit/Withdraw" with a close button (X) in the top right corner. The form contains several input fields: "Available Balance" (£ 0.00), "Transaction Type" (Deposit), "Transaction Date" (13/02/2026), "Amount" (£ 5,000.00), "Bank Ref." (Enter Bank Ref.), and "Cheque No." (Enter Cheque No.). The "Description" field, which contains "Enter Description", is highlighted with an orange border. At the bottom of the form are two buttons: "Cancel" and "Confirm".

20

Click "Confirm"

This screenshot shows the same "Rent Guarantee Deposit/Withdraw" form as in the previous step. The "Description" field now contains the text "Initial Deposit for Rent on Time Account". The "Confirm" button at the bottom right is highlighted with an orange circle, indicating it should be clicked.

Viewing and Paying Rent Guarantee Invoices

21

You can access the Rent Guarantee invoices in two places the best place is from the Accounts - Tenants menu

22

Click "Accounts"

The screenshot shows the iamproperty CRM dashboard. The top navigation bar includes the iamproperty logo, a search bar, and several menu items: My day, Lettings, Sales, Accounts (highlighted with an orange circle), Reporting, and Communications. On the right side of the navigation bar, there are icons for a grid, calendar, notifications, and a user profile labeled 'My a'. Below the navigation bar, the main content area features a large heading 'Welcome back, Training'. Underneath the heading are three buttons: '+ Add New Record', 'View property management', and 'Visit help centre'. A search bar labeled 'Search all records' is positioned below these buttons. At the bottom of the dashboard, there are two panels: 'Today's events' and 'My tasks'. The 'Today's events' panel shows a list of events with columns for Time and Name. The 'My tasks' panel shows a list of tasks with columns for Status, Name, Priority, Start date, and Due date.

Time	Name
08:00	Jemmas 8-4.30
12:00	Test test
16:05	Inspection (Property Inspection): 442 Yew Tree Close, Hurworth, Darlington, DL2 2HX

Status	Name	Priority	Start date	Due date
Not Started	<u>Call Audrey</u>	High	08/Oct/2025	08/Oct/2025
Not Started	<u>test</u>	High	24/Oct/2025	24/Oct/2025
Not Started	<u>Visit</u>	High	28/Oct/2025	28/Oct/2025

23 Click "Tenant"

The screenshot shows the iamproperty CRM dashboard. The top navigation bar includes the iamproperty logo, a user profile icon, and a search icon. Below the navigation bar, there are several menu items: "Accounts dashboard", "General", "Landlord", and "Tenant". The "Tenant" menu item is highlighted with an orange circle. Below the navigation bar, there is a "Welcome back, Training" message and a search bar. The main content area is divided into two sections: "Today's events" and "My tasks".

Time	Name
08:00	James 8-4.30
12:00	Test test
16:05	Inspection (Property Inspection) 442 New Tree Close, Huxworth, Darlington, DL2 2HX

Status	Name	Priority	Start date	Due date
<input type="checkbox"/> Not Started	Call Audrey	High	08/Oct/2025	08/Oct/2025
<input type="checkbox"/> Not Started	test	High	26/Oct/2025	26/Oct/2025
<input type="checkbox"/> Not Started	Visit	High	28/Oct/2025	28/Oct/2025

24 Click "Rent Guarantee" depending on how your settings are set.

The screenshot shows the iamproperty CRM "Tenant" page. The top navigation bar is the same as in the previous screenshot. Below the navigation bar, there are several menu items: "Accounts dashboard", "General", "Landlord", and "Tenant". The "Tenant" menu item is highlighted with an orange circle. Below the navigation bar, there is a "Tenant" header. The main content area is divided into two sections: "Collect Rent" and "Invoice Import". The "Collect Rent" section includes "Rapid Collect" and "Service Charges". The "Invoice Import" section includes "Rent Guarantee" and "Transaction Sheet". The "Rent Guarantee" menu item is highlighted with an orange circle.

Status	Name	Priority	Start date	Due date
<input type="checkbox"/> Not Started	Call Audrey	High	08/Oct/2025	08/Oct/2025
<input type="checkbox"/> Not Started	test	High	26/Oct/2025	26/Oct/2025
<input type="checkbox"/> Not Started	Visit	High	28/Oct/2025	28/Oct/2025

25 If there are any 'Rent Guarantee' invoices to collect, then these will show here.

Rent Guarantee Invoices

Rent Guarantee Balance: £23,000.00 | Total Outstanding: £3,300.00 | Total to Pay: £3,300.00

Payment Date: 05/05/2026 | Bank Account: Morgan & Co Client Acco... | Search: [] | 10

<input type="checkbox"/>	Invoice No.	Tenant	Property	Branch	Description	Due Date	Days Overdue
<input type="checkbox"/>	CRM - 774	lettings applicant183	7159 Pelaw Crescent, Ch...	Morgan & Co	Mr lettings applicant183 ...	01/05/2026	4
<input type="checkbox"/>	CRM - 759	Sales Applicant12	90888 Pelaw Crescent, ...	Morgan & Co	Mr Sales Applicant12 (20...	20/04/20...	15
<input type="checkbox"/>	CRM - 759	Sales Applicant12	90888 Pelaw Crescent, ...	Morgan & Co	Mr Sales Applicant12 (01...	01/03/2026	65

26 The alternate way to view your 'Rent Guarantee' rent invoices.

In the '**Invoices**' tile click here.

Invoices (16/01/2026 - 13/02/2026)

Rent Invoice (View All)

£ 44,525.00	£ 17,150.00	£ 4,050.00	£ 23,325.00
Total Due	Paid	Due	Overdue

Tenant Fee Invoice (View All)

£ 161.00	£ 0.00	£ 0.00	£ 161.00
Total Due	Paid	Due	Overdue

Deposit Invoice (View All)

£ 2,769.23	£ 1,500.00	£ 0.00	£ 1,269.23
Total Due	Paid	Due	Overdue

Service Charge Invoice (View All)

27 Click "View Rent Guarantee"

The screenshot shows the iamproperty CRM interface. The top navigation bar includes 'iamproperty', 'CRM', 'movebutler', and 'iamsold'. The main navigation menu has 'My day', 'Lettings', 'Sales', 'Accounts', 'Reporting', and 'Communications'. The 'Accounts' section is active, showing a 'Rent Guarantee Account' with a balance of £ 0.00. The 'Invoices' section is also active, displaying a date range of 16/01/2026 - 13/02/2026. A dropdown menu is open, showing options: 'View All Invoices', 'View Rent Guarantee', 'New Invoice', 'New Credit Note', 'Import', 'Rent Invoicing', 'Charge Landlord Fee', 'Service Charges', and 'Pay Tenant Invoices'. The 'View Rent Guarantee' option is highlighted with an orange circle. Below the invoices, there are sections for 'Balance Sheet' and 'Expenses'.

Account Type	Reconciled:	Unreconciled:	Unallocated:	Total:
Cash				

Invoice Type	Total Due	Paid	Due	Overdue
Rent Invoice	£ 44,525.00	£ 17,150.00	£ 4,050.00	
Tenant Fee Invoice	£ 161.00	£ 0.00	£ 0.00	
Deposit Invoice	£ 2,769.23	£ 1,500.00	£ 0.00	£ 1,269.23
Service Charge Invoice				

Category	Amount
Assets	£ 556,778.51
Liabilities	£ 556,778.51

Category	Amount
Total	£ 226.80



Please Note. It is your responsibility to set Your Company policy on when a rent becomes overdue. You could opt to pay all rents for properties covered by a Rent Guarantee as soon as they are due, after 1 day or 7 days it is your choice.



From here onward the process of managing the rent collection is exactly the same. The screens you see and the process are the same.

28

The **'Rent Guarantee Invoices'** screen will show you all the CURRENTLY DUE rent invoices that are for properties with the rent guarantee option enabled.

If a Tenant has paid their rent and the rent has been collected by Bank Import or Rapid Collect then that rent invoice will not show in here, only unpaid invoices.

Rent Guarantee Invoices

Rent Guarantee Balance: £5,000.00 | Total Outstanding: £11,900.00 | Total to Pay: £11,900.00

Payment Date: 13/02/2026 | Bank Account: Morgan & Co Client Acco...

Invoice No.	Tenant	Property	Branch	Description	Due Date	Days Overdue
CRM - 738	lettings applicant102	919 Pelaw Crescent, Che...	Morgan & Co	lettings applicant102 (10...	10/02/2026	3
CRM - 738	Letting Applicant34	87 Pelaw Crescent, Ches...	Morgan & Co	Ms Letting Applicant34 (...	06/02/20...	7
CRM - 710	lettings applicant102	919 Pelaw Crescent, Che...	Morgan & Co	lettings applicant102 (10...	10/01/2026	34
CRM - 711	Lettings Applicant126	7278 Pelaw Crescent, Ch...	Morgan & Co	Lettings Applicant126 (19...	19/12/2025	56
CRM - 711	Lettings Applicant126	7278 Pelaw Crescent, Ch...	Morgan & Co	Lettings Applicant126 (19...	19/11/2025	86
CRM - 673	lettings applicant102	919 Pelaw Crescent, Che...	Morgan & Co	lettings applicant102 (10...	10/11/2025	95
CRM - 673	Letting Applicant34	87 Pelaw Crescent, Ches...	Morgan & Co	Ms Letting Applicant34 (...	06/11/2025	99
CRM - 711	Lettings Applicant126	7278 Pelaw Crescent, Ch...	Morgan & Co	Lettings Applicant126 (19...	19/10/2025	117
CRM - 652	lettings applicant102	919 Pelaw Crescent, Che...	Morgan & Co	lettings applicant102 (10...	10/10/2025	126
CRM - 652	Letting Applicant34	87 Pelaw Crescent, Ches...	Morgan & Co	Ms Letting Applicant34 (...	06/10/2025	130

29

Click **"Days Overdue"** the column will sort by ascending or descending order. Clicking on any of the column headers will sort the table data based on the data in the column.

Rent Guarantee Invoices

Rent Guarantee Balance: £5,000.00 | Total Outstanding: £11,900.00 | Total to Pay: £11,900.00

Date: 02/26 | Bank Account: Morgan & Co Client Acco...

Invoice No.	Tenant	Property	Branch	Description	Due Date	Days Overdue
M - 738	lettings applicant102	919 Pelaw Crescent, Che...	Morgan & Co	lettings applicant102 (10...	10/02/2026	3
M - 738	Letting Applicant34	87 Pelaw Crescent, Ches...	Morgan & Co	Ms Letting Applicant34 (...	06/02/20...	7
M - 710	lettings applicant102	919 Pelaw Crescent, Che...	Morgan & Co	lettings applicant102 (10...	10/01/2026	34
M - 711	Lettings Applicant126	7278 Pelaw Crescent, Ch...	Morgan & Co	Lettings Applicant126 (19...	19/12/2025	56
M - 711	Lettings Applicant126	7278 Pelaw Crescent, Ch...	Morgan & Co	Lettings Applicant126 (19...	19/11/2025	86
M - 673	lettings applicant102	919 Pelaw Crescent, Che...	Morgan & Co	lettings applicant102 (10...	10/11/2025	95
M - 673	Letting Applicant34	87 Pelaw Crescent, Ches...	Morgan & Co	Ms Letting Applicant34 (...	06/11/2025	99
M - 711	Lettings Applicant126	7278 Pelaw Crescent, Ch...	Morgan & Co	Lettings Applicant126 (19...	19/10/2025	117
M - 652	lettings applicant102	919 Pelaw Crescent, Che...	Morgan & Co	lettings applicant102 (10...	10/10/2025	126

30

Click the checkbox next to the invoice(s) you are paying from the Rent Guarantee account. You can select multiple rents from this screen and pay them all at the same time

iamproperty CRM movebutler

My day Lettings Sales Accounts Reporting Communications

Rent Guarantee Invoices

Rent Guarantee Balance £ 5,000.00 Total Outstanding £ 11,900.00 Total to Pay

Payment Date 13/02/2026 Bank Account Morgan& Co Client Acco... Search 10

<input type="checkbox"/>	Invoice No.	Tenant	Property	Branch	Description	Due Date	Days Overdue
<input type="checkbox"/>	CRM - 711	Lettings Applicant126	7278 Pelaw Crescent, Ch...	Morgan & Co	Lettings Applicant126 (19...	19/08/2025	178
<input type="checkbox"/>	CRM - 711	Lettings Applicant126	7278 Pelaw Crescent, Ch...	Morgan & Co	Lettings Applicant126 (19...	19/09/2025	147
<input type="checkbox"/>	CRM - 652	Letting Applicant34	87 Pelaw Crescent, Ches...	Morgan & Co	Ms Letting Applicant34 (L...	06/10/2025	130
<input type="checkbox"/>	CRM - 652	lettings applicant102	919 Pelaw Crescent, Che...	Morgan & Co	lettings applicant102 (10...	10/10/2025	126
<input type="checkbox"/>	CRM - 711	Lettings Applicant126	7278 Pelaw Crescent, Ch...	Morgan & Co	Lettings Applicant126 (19...	19/10/2025	117
<input type="checkbox"/>	CRM - 673	Letting Applicant34	87 Pelaw Crescent, Ches...	Morgan & Co	Ms Letting Applicant34 (L...	06/11/2025	99
<input type="checkbox"/>	CRM - 673	lettings applicant102	919 Pelaw Crescent, Che...	Morgan & Co	lettings applicant102 (10...	10/11/2025	95
<input type="checkbox"/>	CRM - 711	Lettings Applicant126	7278 Pelaw Crescent, Ch...	Morgan & Co	Lettings Applicant126 (19...	19/11/2025	86
<input type="checkbox"/>	CRM - 711	Lettings Applicant126	7278 Pelaw Crescent, Ch...	Morgan & Co	Lettings Applicant126 (19...	19/12/2025	56

31

Once payments are selected then click the 'Pay' icon

iamproperty CRM movebutler

My day Lettings Sales Accounts Reporting Communications

Rent Guarantee Invoices

Rent Guarantee Balance £ 4,400.00 Total Outstanding £ 11,300.00 Total to Pay £ 10,900.00

Payment Date 13/02/2026 Bank Account Morgan& Co Client Acco... Search 10

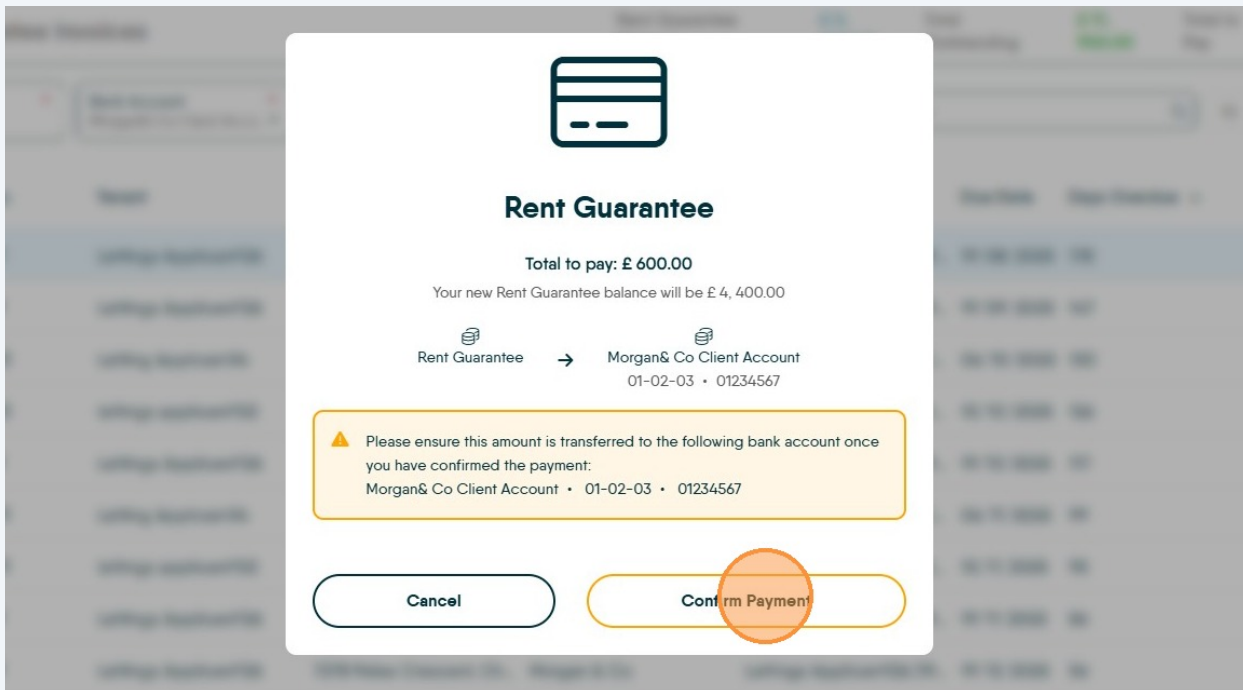
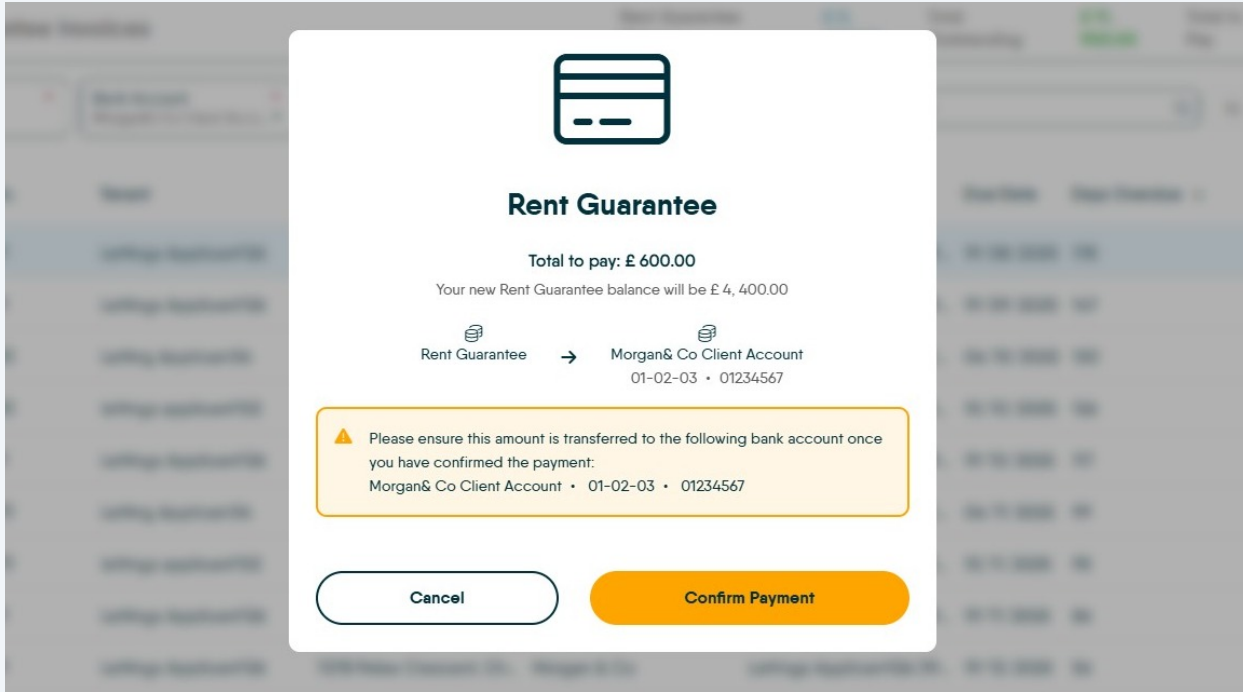
<input checked="" type="checkbox"/>	Invoice No.	Tenant	Property	Branch	Description	Due Date	Days Overdue
<input checked="" type="checkbox"/>	CRM - 711	Lettings Applicant126	7278 Pelaw Crescent, Ch...	Morgan & Co	Lettings Applicant126 (19...	19/09/2025	147
<input checked="" type="checkbox"/>	CRM - 652	Letting Applicant34	87 Pelaw Crescent, Ches...	Morgan & Co	Ms Letting Applicant34 (L...	06/10/2025	130
<input checked="" type="checkbox"/>	CRM - 652	lettings applicant102	919 Pelaw Crescent, Che...	Morgan & Co	lettings applicant102 (10...	10/10/2025	126
<input type="checkbox"/>	CRM - 711	Lettings Applicant126	7278 Pelaw Crescent, Ch...	Morgan & Co	Lettings Applicant126 (19...	19/10/2025	117
<input type="checkbox"/>	CRM - 673	Letting Applicant34	87 Pelaw Crescent, Ches...	Morgan & Co	Ms Letting Applicant34 (L...	06/11/2025	99
<input type="checkbox"/>	CRM - 673	lettings applicant102	919 Pelaw Crescent, Che...	Morgan & Co	lettings applicant102 (10...	10/11/2025	95
<input type="checkbox"/>	CRM - 711	Lettings Applicant126	7278 Pelaw Crescent, Ch...	Morgan & Co	Lettings Applicant126 (19...	19/11/2025	86
<input type="checkbox"/>	CRM - 711	Lettings Applicant126	7278 Pelaw Crescent, Ch...	Morgan & Co	Lettings Applicant126 (19...	19/12/2025	56
<input type="checkbox"/>	CRM - 710	lettings applicant102	919 Pelaw Crescent, Che...	Morgan & Co	lettings applicant102 (10...	10/01/2026	36

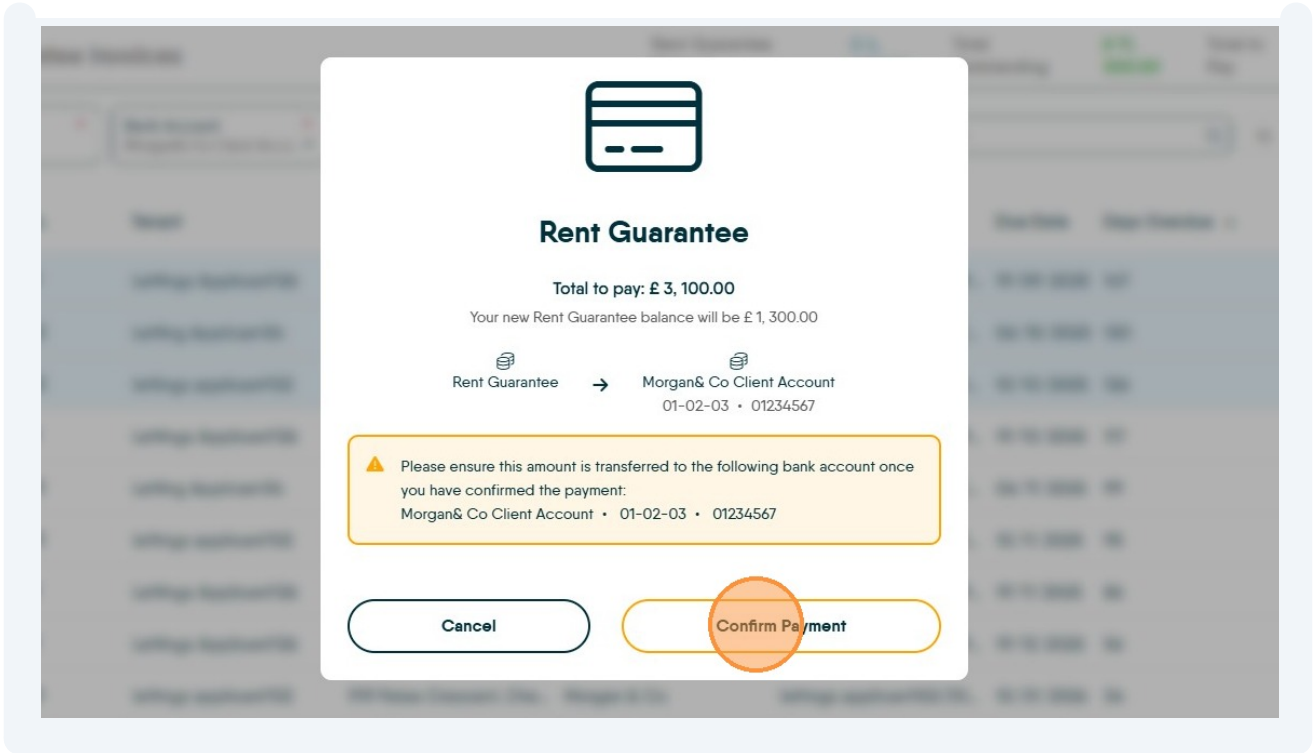
32

You will see this screen confirming the payment.

Click **"Confirm Payment"**

The confirmation screen will show the total amount to be paid Click **"Confirm Payment"**





33

Once the 'Rent Guarantee' payment has been confirmed, the related rent payments will show in the client account as an 'Agent Rent Payment (Rent Payment)' and will also show in the Rent Guarantee account.

You also need to ensure that the money for the rent guarantee payment is transferred from your agencies Business/Rent Guarantee account into the Client Account so the money is available to be paid out to the Landlord and expenses to Contractors can be paid.

34

These are the Rent payments out from the Rent Guarantee process. From here on the process to pay out to your landlords is as it normally would be.

Date	Description	Bank Reference	Credit	Debit	Balance	Unallocated	Source
27/03/2026 16:47	lettings applicant102 (10/03/2026 - 0...		£ 1,400.00	£ 0.00	£ 500,045.83	£ 0.00	Agent Rent Payment (F
27/03/2026 16:47	Ms Letting Applicant34 (06/03/2026 - ...		£ 1,100.00	£ 0.00	£ 498,645.83	£ 0.00	Agent Rent Payment (F
27/03/2026 16:47	lettings applicant102 (17/02/2026 - 03...		£ 644.42	£ 0.00	£ 497,545.83	£ 0.00	Agent Rent Payment (F
17/02/2026 11:53	lettings applicant102 (10/01/2026 - 09...		£ 0.00	£ 1,400.00	£ 496,901.41	£ 1,400.00	Agent Rent Tenant Pay
17/02/2026 11:53	Rent payment		£ 1,400.00	£ 0.00	£ 498,301.41	£ 0.00	Tenant Bank Receipt (t
17/02/2026 11:48	lettings applicant102 (10/11/2025 - 09...		£ 0.00	£ 1,400.00	£ 496,901.41	£ 0.00	Agent Rent Tenant Pay
17/02/2026 11:48	lettings applicant102 (10/10/2025 - 09...		£ 0.00	£ 700.00	£ 498,301.41	£ 700.00	Agent Rent Tenant Pay
17/02/2026 11:48	paid 10/10 and 10/11		£ 2,100.00	£ 0.00	£ 499,001.41	£ 0.00	Tenant Bank Receipt (t
17/02/2026 11:47	lettings applicant102 (10/10/2025 - 09...		£ 0.00	£ 700.00	£ 496,901.41	£ 700.00	Agent Rent Tenant Pay
17/02/2026 11:47	part paid by dsd;ivm;ivm;iv;iv		£ 700.00	£ 0.00	£ 497,601.41	£ 0.00	Tenant Bank Receipt (t

35

If you would like to view the generated transactions. On the Accounts tile, click the 'view transactions' icon in the Client Account section.

The screenshot shows the Accounts section of the iamproperty system. It features several summary tiles:

- Morgan & Co Client Account:** Balance £ 496,901.41, Reconciled £ 472,900.93, Unallocated Funds £ 29,319.85, Unreconciled £ 24,000.48. A red circle highlights the 'View Transactions' icon.
- Morgan & Co Held Deposits:** Balance £ 14,354.84, Reconciled £ 14,354.84, Unallocated Funds £ 0.00, Unreconciled £ 0.00.
- Balance Sheet:** Assets £ 583,001.51, Liabilities £ 583,001.51.
- Invoices:** Rent Invoice (Total Due £ 46,515.00, Paid £ 169.23, Due £ 1,150.00), Tenant Fee Invoice (Total Due £ 151.00, Paid £ 0.00, Due £ 0.00), Service Charge Invoice (Total Due £ 25.00, Paid £ 0.00, Due £ 0.00), Agent Fee Invoice.
- Expenses:** Total (01/12/2025 - 27/03/2026).

36

From here on the process is the same as you would do to process a non 'Rent Guarantee' rent payment, Landlord fees, property expenses payments, management fees etc are all processed as you would a normal rent payment out to the Landlord. Statements will look the same.

Collecting Guaranteed Rent Arrears from Tenants



Alert! After the rent is paid out to the landlord it is still owed to the Agent from the Tenant. The following instructions cover what happens to the outstanding rent owed by the Tenant to the Agent.

37

When a guaranteed rent is paid out to a landlord, the tenant's rent invoice will become an **'Agent Rent Invoice'** in their ledger.

38

Anywhere in CRM that the Tenant Rent Arrears will show, the **Agent Rent Invoice** will also show. This allows the guaranteed rent to be (repaid) collected if paid by the tenant.

The screenshot shows the 'Rapid Collect' interface with the following data:

Tenant	Property	Type	Due Date	Days OS	Invoice Amount	Amount
lettings applicant1...	7159 Pelaw Crescent, Ch...	Rent Invoice	01/03/2025	415	£ 1,500.00	£ 1,500.00
lettings applicant1...	7159 Pelaw Crescent, Ch...	Rent Invoice	01/04/2025	384	£ 1,500.00	£ 1,500.00
lettings applicant1...	7159 Pelaw Crescent, Ch...	Rent Invoice	01/05/2025	354	£ 1,500.00	£ 1,500.00
lettings applicant1...	7159 Pelaw Crescent, Ch...	Rent Invoice	01/06/2025	323	£ 1,500.00	£ 1,500.00
lettings applicant1...	7159 Pelaw Crescent, Ch...	Rent Invoice	01/07/2025	293	£ 1,500.00	£ 1,500.00
lettings applicant1...	7159 Pelaw Crescent, Ch...	Rent Invoice	01/08/2025	262	£ 1,500.00	£ 1,500.00
lettings applicant1...	7159 Pelaw Crescent, Ch...	Agent Rent Invoice	01/09/2025	231	£ 1,500.00	£ 1,500.00
lettings applicant1...	7159 Pelaw Crescent, Ch...	Agent Rent Invoice	01/10/2025	201	£ 1,500.00	£ 1,500.00
lettings applicant121	345 5 Yew Tree Close, H...	Rent Invoice	06/10/2025	196	£ 1,100.00	£ 1,100.00
Letitia Applicant106	35 Kinswaw, Darlington	Rent Invoice	08/10/2025	194	£ 1,100.00	£ 1,100.00

39

When paid by the Tenant the rent can be collected from any where you currently pay overdue rent invoices e.g Rapid Collect.

Rapid Collect Total Outstanding £ 221,068.65 Total to Collect £ 3,000.00

Date Collected: 20/04/2026 | Bank Account: Select bank account | Payment Method: Select payment method | Search: [] | 20 [] [] []

Tenant	Property	Type	Due Date	Days OS	Invoice Amount	Amount	
lettings applicant1...	7159 Pelaw Crescent, Ch...	Rent Invoice	01/03/2025	415	£ 1,500.00	£ 1,500.00	
lettings applicant1...	7159 Pelaw Crescent, Ch...	Rent Invoice	01/04/2025	384	£ 1,500.00	£ 1,500.00	
lettings applicant1...	7159 Pelaw Crescent, Ch...	Rent Invoice	01/05/2025	354	£ 1,500.00	£ 1,500.00	
lettings applicant1...	7159 Pelaw Crescent, Ch...	Rent Invoice	01/06/2025	323	£ 1,500.00	£ 1,500.00	
lettings applicant1...	7159 Pelaw Crescent, Ch...	Rent Invoice	01/07/2025	293	£ 1,500.00	£ 1,500.00	
lettings applicant1...	7159 Pelaw Crescent, Ch...	Rent Invoice	01/08/2025	262	£ 1,500.00	£ 1,500.00	
<input checked="" type="checkbox"/>	lettings applicant1...	7159 Pelaw Crescent, Ch...	Agent Rent Invoice	01/09/2025	231	£ 1,500.00	£ 1,500.00
<input checked="" type="checkbox"/>	lettings applicant1...	7159 Pelaw Crescent, Ch...	Agent Rent Invoice	01/10/2025	201	£ 1,500.00	£ 1,500.00
lettings applicant121	345 5 Yew Tree Close, H...	Rent Invoice	06/10/2025	196	£ 1,100.00	£ 1,100.00	
Letitia Applicant106	35 Kingswaw, Darlington	Rent Invoice	08/10/2025	194	£ 1,100.00	£ 1,100.00	

40

Once the Agent Rent Invoice is paid, the funds reimburse the Rent Guarantee Account

Accounts Search: [] | 10 [] [] []

Group By Date

Date	Transaction Type	Description	Credit	Debit	Balance	Unallocated
20/04/2026	Agent Rent Tenant Paym...	Mr lettings applicant183 ...	£ 1,500.00	£ 0.00	£ 19,000.00	£ 1,500.00
20/04/2026	Agent Rent Tenant Paym...	Mr lettings applicant183 ...	£ 1,500.00	£ 0.00	£ 17,500.00	£ 1,500.00
20/04/2026	Agent Rent Payment	Mr lettings applicant183 ...	£ 0.00	£ 1,500.00	£ 16,000.00	
20/04/2026	Agent Rent Payment	Mr lettings applicant183 ...	£ 0.00	£ 1,500.00	£ 17,500.00	
20/04/2026	Agent Rent Payment	Mr lettings applicant183 ...	£ 0.00	£ 1,500.00	£ 19,000.00	
20/04/2026	Agent Rent Payment	Mr lettings applicant183 ...	£ 0.00	£ 1,500.00	£ 20,500.00	
20/04/2026	Agent Rent Payment	Mr lettings applicant183 ...	£ 0.00	£ 1,500.00	£ 22,000.00	
20/04/2026	Agent Rent Payment	Mr lettings applicant183 ...	£ 0.00	£ 1,500.00	£ 23,500.00	
13/04/2026	Agent Rent Tenant Paym...	lettings applicant102 (10...	£ 1,400.00	£ 0.00	£ 25,000.00	£ 1,400.00
13/04/2026	Agent Rent Tenant Paym...	Ms Letting Applicant34 (...	£ 1,100.00	£ 0.00	£ 23,600.00	£ 1,100.00

1 to 10 of 47 | Page 1 of 5



Alert! The Tenant will have paid their rent into the Client Account, so you need to ensure you transfer the the correct amount to the Rent Guarantee/Business account to refund the initial rent guarantee payment.

Managing the Rent Guarantee Account

41 To add or withdraw funds from the Rent Guarantee Account, click here.

The screenshot displays the 'iamproperty' CRM dashboard. The 'Accounts' section is active, showing a 'Rent Guarantee Account' with a balance of £25,000.00. A 'Deposit/Withdraw' button is highlighted with an orange circle. The 'Invoices' section shows three invoices: Rent Invoice (Total Due £61,715.00, Paid £11,075.00, Due £0.00, Overdue £50,640.00), Tenant Fee Invoice (Total Due £151.00, Paid £0.00, Due £0.00, Overdue £151.00), and Service Charge Invoice (Total Due £25.00, Paid £0.00, Due £0.00, Overdue £25.00). The 'Balance Sheet' shows Assets of £603,772.93 and Liabilities of £603,772.93. The 'Expenses' section shows a total of £1,000.00.

42 Click here to select the "Transaction Type" either deposit or withdraw

Rent Guarantee Deposit/Withdraw



Available Balance £ 0.00	Transaction Type Deposit
Transaction Date * 20/04/2026	Amount £ 0.00
Bank Ref. Enter Bank Ref.	Cheque No. Enter Cheque No.
Description * Enter Description	

Cancel

Confirm

Rent Guarantee Deposit/Withdraw



Available Balance £ 0.00	Transaction Type * Deposit
Transaction Date * 20/04/2026	<input type="text"/>
Bank Ref. Enter Bank Ref.	Deposit
	Withdrawal
Description * Enter Description	

Cancel

Confirm

43

Click the **"Amount"** field and add in the amount you are adding or withdrawing from the account.

Withdrawing funds re credits the Business Account (or where the money was transferred from) N.B. This money needs to be physically transferred from the Rent Guarantee Account to your Business Account it is not added to the Client Account visible in CRM.

The screenshot shows a modal window titled "Rent Guarantee Deposit/Withdraw" with a close button (X) in the top right corner. The form contains several input fields:

- Available Balance: £ 0.00
- Transaction Type: Deposit (dropdown menu)
- Transaction Date: 20/04/2026 (with a red asterisk)
- Amount: £ 0.00 (highlighted with an orange box and a red asterisk)
- Bank Ref.: Enter Bank Ref.
- Cheque No.: Enter Cheque No.
- Description: Enter Description (with a red asterisk)

At the bottom of the modal, there are two buttons: "Cancel" and "Confirm".

44

Click **"View Transactions"** to view the details in the Rent Guarantee Account.

The screenshot displays the CRM dashboard for "iamproperty". The top navigation bar includes "My day", "Lettings", "Sales", "Accounts", "Reporting", and "Communications". The main content area is divided into several sections:

- Accounts:** Shows a balance of £ 0.00 for the "Rent Guarantee Account". A "View Transactions" button is highlighted with an orange circle.
- Invoices:** Displays a "Rent Invoice" with a total due of £ 44,525.00 and a "Paid" amount of £ 17,150.00. It also shows "Tenant Fee Invoice" and "Deposit Invoice".
- Cash accounts:** Lists "Morcan & Co (Cash)" with reconciled, unreconciled, and unallocated amounts.
- Balance Sheet:** Shows Assets of £ 556,778.51 and Liabilities of £ 556,778.51.
- Expenses:** Shows a total expense amount.

45

This will show all the transactions in the Rent Guarantee Account. The '**Group By Date**' option will allow you to see all transactions made that day and deposit/withdraw funds as required.

We would advise doing this once per day to keep the process simple.

<input type="checkbox"/>	Date	Transaction Type	Description	Credit	Debit	Balance	Unalloc
<input type="checkbox"/>	13/02/2026	Agent Rent Payment	Lettings Applicant126 (19...	£ 0.00	£ 600.00	£ 1,300.00	£
<input type="checkbox"/>	13/02/2026	Agent Rent Payment	lettings applicant102 (10...	£ 0.00	£ 1,400.00	£ 1,900.00	£
<input type="checkbox"/>	13/02/2026	Agent Rent Payment	Ms Letting Applicant34 (...)	£ 0.00	£ 1,100.00	£ 3,300.00	£
<input type="checkbox"/>	13/02/2026	Agent Rent Payment	Lettings Applicant126 (19...	£ 0.00	£ 600.00	£ 4,400.00	£
<input type="checkbox"/>	13/02/2026	Agent Rent Account De...	Initial Deposit for Rent o...	£ 5,000.00	£ 0.00	£ 5,000.00	£ 1,30

46

Balance is the amount left in your deposited and received funds to pay Rent Guarantees from.

iamproperty

Sales Accounts Reporting Communications

Balance £ 13, 555.58

Search

Description	Credit	Debit	Bal
Mr Sales Applicant12 (01...	£ 0.00	£ 1,200.00	£ 13,555.58
lettings applicant102 (10...	£ 0.00	£ 1,400.00	£ 14,755.58

47

Agent Rent Payment is payment out to the Landlords from your Rent Guarantee account. **'Agent Rent Tenant Payment'** is the repayment from the the Tenant of the guaranteed rent payment.

Rent Guarantee Account Balance £ 13, 555.58 Selected

Group By Date Search 10

Date	Transaction Type	Description	Credit	Debit	Balance
01/04/2026	Agent Rent Payment	Mr Sales Applicant12 (01...	£ 0.00	£ 1,200.00	£ 13,555.58
27/03/2026	Agent Rent Payment	lettings applicant102 (10...	£ 0.00	£ 1,400.00	£ 14,755.58
27/03/2026	Agent Rent Payment	Ms Letting Applicant34 (...)	£ 0.00	£ 1,100.00	£ 16,155.58
27/03/2026	Agent Rent Payment	lettings applicant102 (17...	£ 0.00	£ 644.42	£ 17,255.58
17/02/2026	Agent Rent Tenant Paym...	lettings applicant102 (10...	£ 1,400.00	£ 0.00	£ 17,900.00
17/02/2026	Agent Rent Tenant Paym...	lettings applicant102 (10...	£ 1,400.00	£ 0.00	£ 16,500.00
17/02/2026	Agent Rent Tenant Paym...	lettings applicant102 (10...	£ 700.00	£ 0.00	£ 15,100.00
17/02/2026	Agent Rent Tenant Paym...	lettings applicant102 (10...	£ 700.00	£ 0.00	£ 14,400.00
17/02/2026	Agent Rent Payment	lettings applicant102 (10...	£ 0.00	£ 1,400.00	£ 13,700.00
17/02/2026	Agent Rent Payment	Ms Letting Applicant34 (...)	£ 0.00	£ 1,100.00	£ 15,100.00

1 to 10 of 23 Page 1 of 3