

How To edit a Tenant Invoice



Learn how to locate and modify existing rent invoices within the iamproperty CRM platform.

This is something you might need to do if a rent has changed and the rent amount on the tenant record hasn't been changed before the rent invoice is created automatically by CRM Accounts.

This guide provides step-by-step instructions for editing transaction amounts to ensure your ledger data remains accurate and up to date.



Alert! Please be aware this can only be done before the rent/invoice is collected.

1

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

In this example we are going to edit the value of the highlighted invoice and change it from £700 to £800

iamproperty

My day

Lettings

Sales

Accounts

Reporting

Communications

My account

Invoices

Payment Date

17/09/2026

Payment Method

Select payment method

Bank Account

Select payment account

+

Search

10

Record Type	Record	Property	Invoice Type	Description	Due ...	Invoice Amount
Tenant	Lettings Applicant188	Bedroom 4, 63 Woodlan...	Rent Invoice	Mr Lettings Applicant188...	17/09/2026	£ 200.00
Tenant	Stanley Morgan	Flat 2 Chesterfields, Stan...	Rent Invoice	Mr Stanley Morgan (17/0...	17/09/2026	£ 700.00
Tenant	applicant105	822 Pelaw Crescent, Che...	Rent Invoice	applicant105 (15/09/202...	15/09/2026	£ 1,800.00
Tenant	Leonard Reeks	355 Yew Tree Close, Hur...	Rent Invoice	Mr Leonard Reeks (14/09...	14/09/2026	£ 1,200.00
Tenant	Lettings Applicant31	45 Kingsway, Darlington	Rent Invoice	Miss Lettings Applicant3...	14/09/2026	£ 1,610.00
Tenant	Sales Applicant12	733 Pelaw Crescent, Che...	Rent Invoice	Mr Sales Applicant12 (14/...	14/09/2026	£ 750.00
Tenant	Lettings Applicant103	111 Yew Tree Close, Hurw...	Rent Invoice	Mr Lettings Applicant103...	13/09/2026	£ 1,400.00
Tenant	applicant102	319 Yew Tree Close, Hurw...	Rent Invoice	Mr applicant102 (13/09/...	13/09/2026	£ 1,300.00
Tenant	Lettings Applicant86	162 Yew Tree Close, Hurw...	Rent Invoice	Lettings Applicant86 (13/...	13/09/2026	£ 1,200.00
Tenant	Lettings Applicant34	71 Pelaw Crescent, Chest...	Rent Invoice	Mrs Lettings Applicant34...	12/09/2026	£ 1,000.00

2 Open the **Ledger** tab.

Tenant	Lettings Applicant31	45 Kingsway, Darlington
Tenant	Sales Applicant12	733 Pelaw Crescent, Che...
Tenant	Lettings Applicant103	111 Yew Tree Close, Hurw...
Tenant	applicant102	319 Yew Tree Close, Hurw...
Tenant	Lettings Applicant86	162 Yew Tree Close, Hurw...
Tenant	Lettings Applicant34	71 Pelaw Crescent, Chest...



Invoices X

Ledger X

Ledger Selection

3 Select **Tenant Ledger** from the Ledger Type menu.

iamproperty CRM movebutler

iamproperty My day Lettings Sales Accounts Reporting Communications

Ledger Type
Select ledger type

Record
Search for Record

Outstanding Invoices £ 0.00

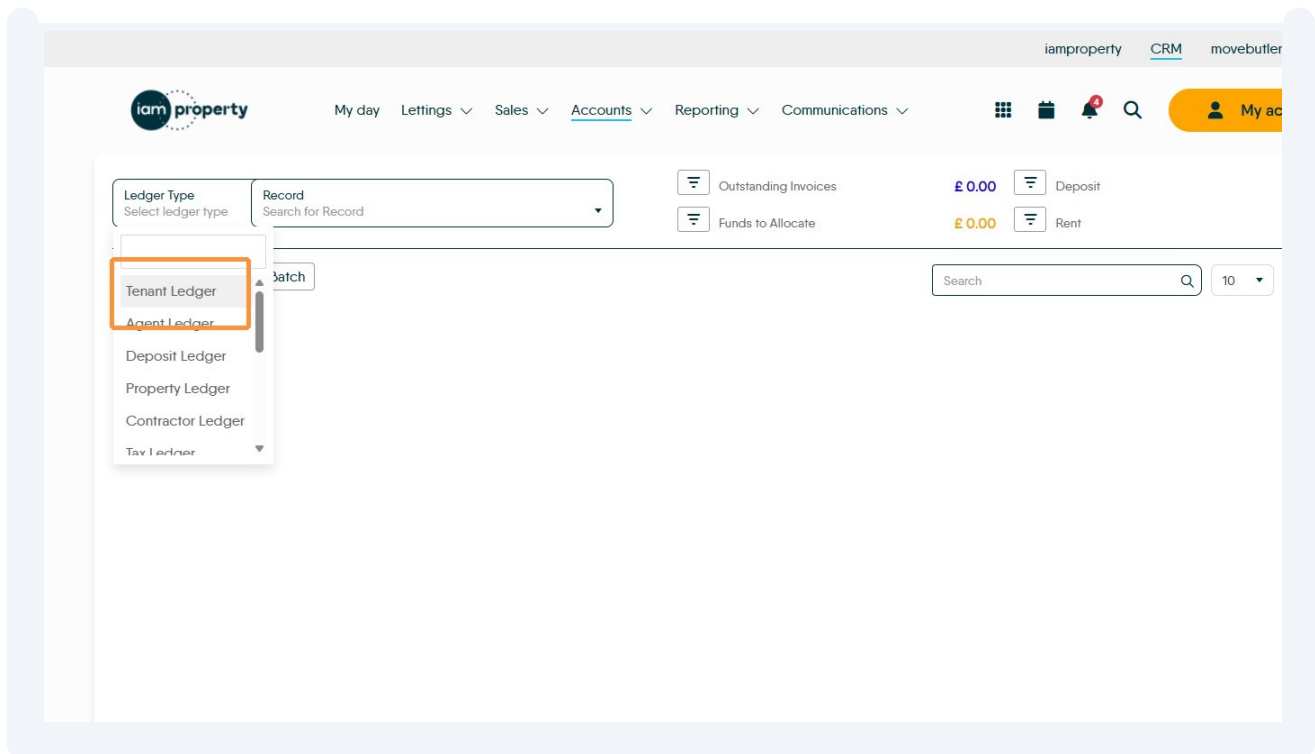
Funds to Allocate £ 0.00

Deposit

Rent

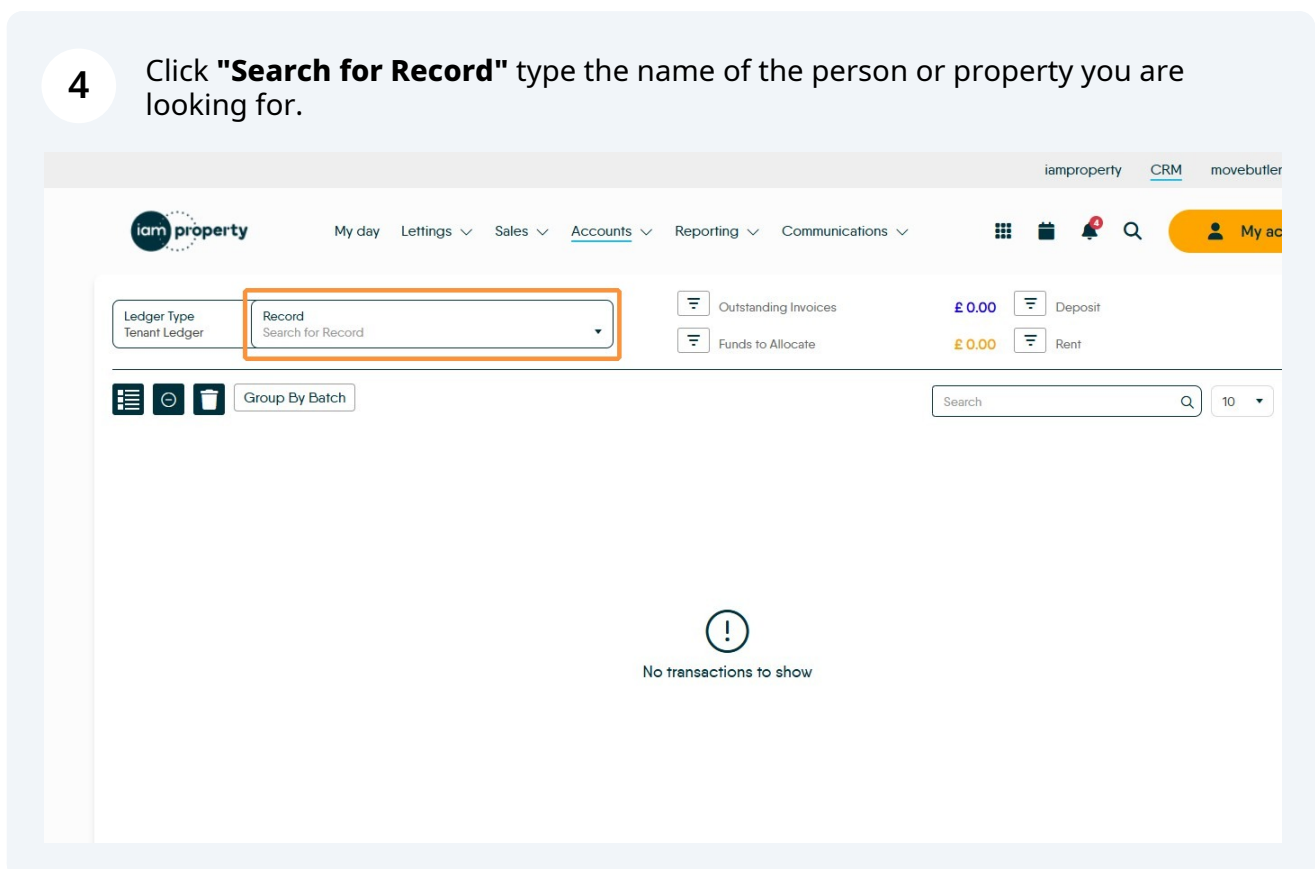
Group By Batch

Search 10



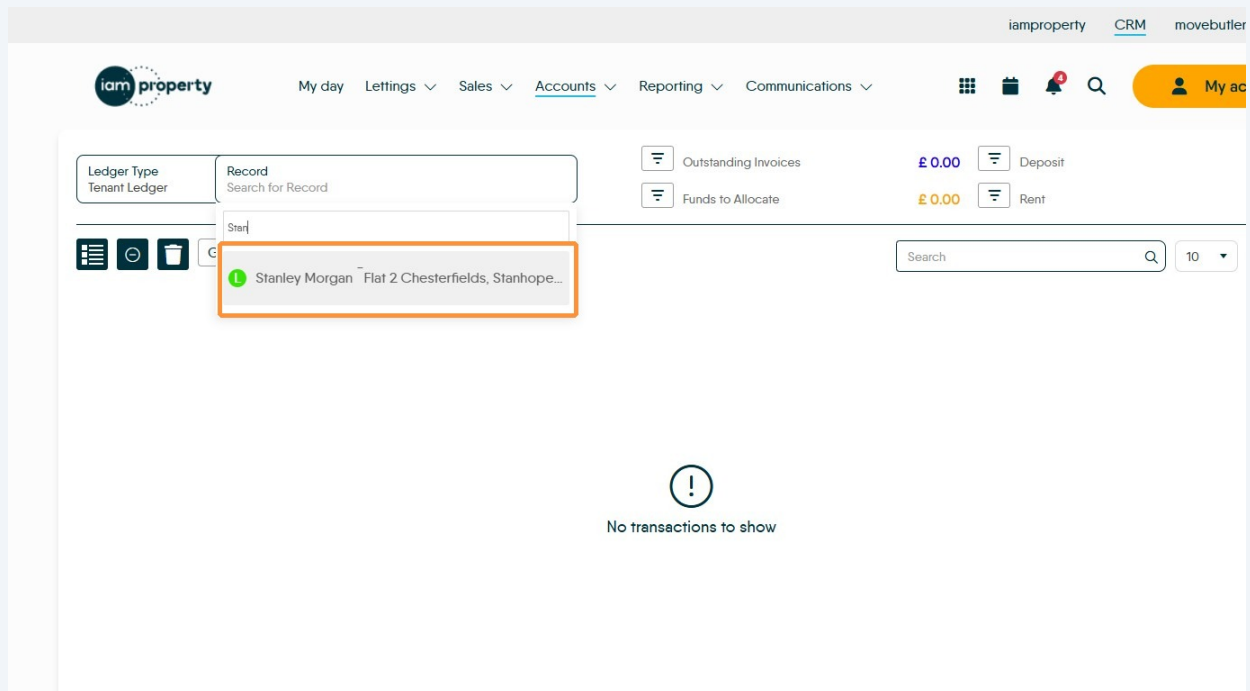
4

Click **"Search for Record"** type the name of the person or property you are looking for.



Transaction Selection

5 In this example case we search for and select "Stanley Morgan"



6 The tenant ledger will show on the screen. Find the 'Rent Invoice' you want to edit, this will usually be the most recent record e.g. the one at the top of the list!. Click the 3-dot menu

Tenant Ledger

Stanley Morgan - Flat 2 Chesterfields, Stanhope Road, Darl

Funds to Allocate

£0.00

Rent

Group By Batch

Search

	ID	Transaction Date	Transaction Type	Transaction Sub-Type	Invoice No	Descr
	☒ 41308600	17/09/2026 00:02	Rent Invoice	Residential Rent	CRM - 942	Mr Sta
	☐ 40983024	28/08/2026 00:02	Landlord Service Charge...	Landlord Service Charge	CRM - 929	Clean
	☐ 40876335	19/08/2026 10:56	Rent Payment	Residential Rent	CRM - 827	Mr Sta
	☐ 40876334	19/08/2026 10:56	Tenant Bank Receipt	Online Transfer	CRM - 827	Mr Sta
	☐ 40831487	17/08/2026 00:11	Rent Invoice	Residential Rent	CRM - 878	Mr Sta
	☐ 40023887	28/07/2026 00:02	Landlord Service Charge...	Landlord Service Charge	CRM - 874	Clean
	☐ 39942233	20/07/2026 11:39	Rent Payment	Residential Rent	CRM - 851	Mr Sta
	☐ 39942232	20/07/2026 11:39	Tenant Bank Receipt	Online Transfer	CRM - 851	Mr Sta
	☐ 39913087	17/07/2026 00:02	Rent Invoice	Residential Rent	CRM - 851	Mr Sta
	☐ 39085492	28/06/2026 00:01	Landlord Service Charge	Landlord Service Charge	CRM - 842	Clean

Amount Update

7 From the menu click "Edit"

The screenshot shows the 'Accounts' section of the 'iam property' system. A table lists transactions for 'Stanley Morgan - Flat 2 Chesterfields, Stanhope Road, Dar'. The first transaction, ID 41308600, is selected. A context menu is open over it, with the 'Edit' option circled in orange. Other options include 'Exclude', 'Delete', 'invoice', and 'Transaction Chain'. The table columns are: ID, Transaction Date, Transaction Type, Transaction Sub-Type, Invoice No, and Description.

ID	Transaction Date	Transaction Type	Transaction Sub-Type	Invoice No	Description
41308600	17/09/2026 00:02	Rent Invoice	Residential Rent	CRM - 942	Mr Stanley Morgan (17/09/2026)
4	28/08/2026 00:02	Landlord Service Charge...	Landlord Service Charge	CRM - 929	Cleaning
5	19/08/2026 10:56	Rent Payment	Residential Rent	CRM - 827	Mr Stanley Morgan (17/06/2026)
4	19/08/2026 10:56	Tenant Bank Receipt	Online Transfer	CRM - 827	Mr Stanley Morgan (17/06/2026)
	17/08/2026 00:11	Rent Invoice	Residential Rent	CRM - 878	Mr Stanley Morgan (17/08/2026)
40023887	28/07/2026 00:02	Landlord Service Charge...	Landlord Service Charge	CRM - 874	Cleaning
39942233	20/07/2026 11:39	Rent Payment	Residential Rent	CRM - 851	Mr Stanley Morgan (17/07/2026)
39942232	20/07/2026 11:39	Tenant Bank Receipt	Online Transfer	CRM - 851	Mr Stanley Morgan (17/07/2026)
39913087	17/07/2026 00:02	Rent Invoice	Residential Rent	CRM - 851	Mr Stanley Morgan (17/07/2026)

8 Edit the number in the Amount field. In this case from 700 -800

The screenshot shows the 'Edit Transaction #41308600' form. The 'Amount' field is highlighted with an orange box. The form contains the following fields:

- Property: Flat 2 Chesterfields, Stanhope Road, Darlington, County Durham, DL3 7AR, UK
- Transaction Type: Rent Invoice
- Sub Type: Residential Rent
- Date: 17/09/2026 00:02
- Amount: £ 700.00
- Invoice No: CRM - 942
- Cheque No: Enter cheque no
- Bank Reference: Morgan Chestfields
- Excluded: ☐
- Description: Mr Stanley Morgan (17/09/2026 - 16/10/2026)

At the bottom, there is a table showing the transaction details:

ID	Ledger Type	Property	Debit	Credit	Net
41308600	Tenant Ledger	Flat 2 Chesterfields, Stanhope Road, Darlington, County Durham, DL3 7AR, UK	£ 0.00	£ 0.00	£ 700.00

Buttons for 'Cancel' and 'Save' are at the bottom.

9 Click "Save"

The screenshot shows a rent invoice form with the following fields:

- Property: Flat 2 Chesterfields, Stanhope Road, Darlington, County Durham, DL3 7AR, UK
- Transaction Type: Rent Invoice
- Sub Type: Residential Rent
- Date: 17/09/2026 00:02
- Amount: £ 800.00
- Invoice No: CRM - 942
- Cheque No: Enter cheque no
- Bank Reference: Morgan Chestefields
- Excluded: ☐
- Description: Mr Stanley Morgan (17/09/2026 - 16/10/2026)

Below the form is a table with the following data:

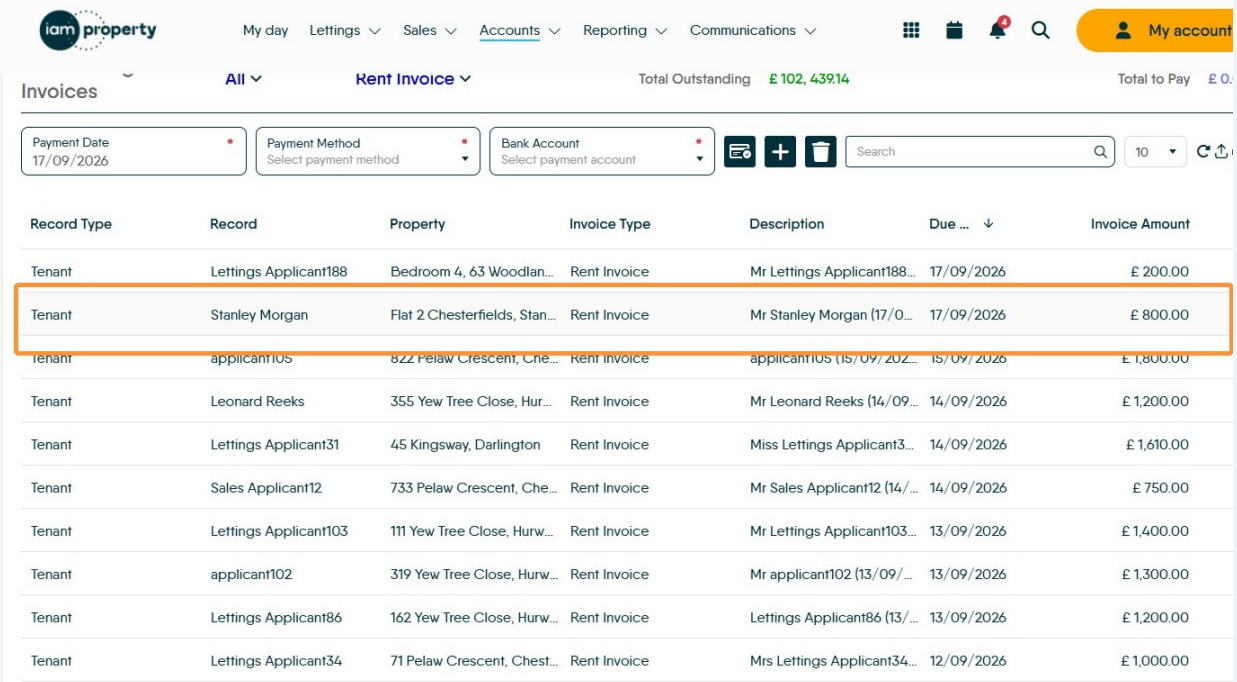
ID	Ledger Type	Property	Debit	Credit	Net
43208A00	Tenant Ledger	Flat 2 Chesterfields, Stanhope Road, Darlington, County Durham, DL3 7AR, UK	£ 0.00	£ 0.00	£ 700.00

At the bottom of the form are two buttons: "Cancel" and "Save". The "Save" button is highlighted with an orange border.

Verify Updated Amount

- 10 Return to the **Tenant Ledger**, you may need to refresh the screen. Scroll across to the **'Net'** column which will now show £800.

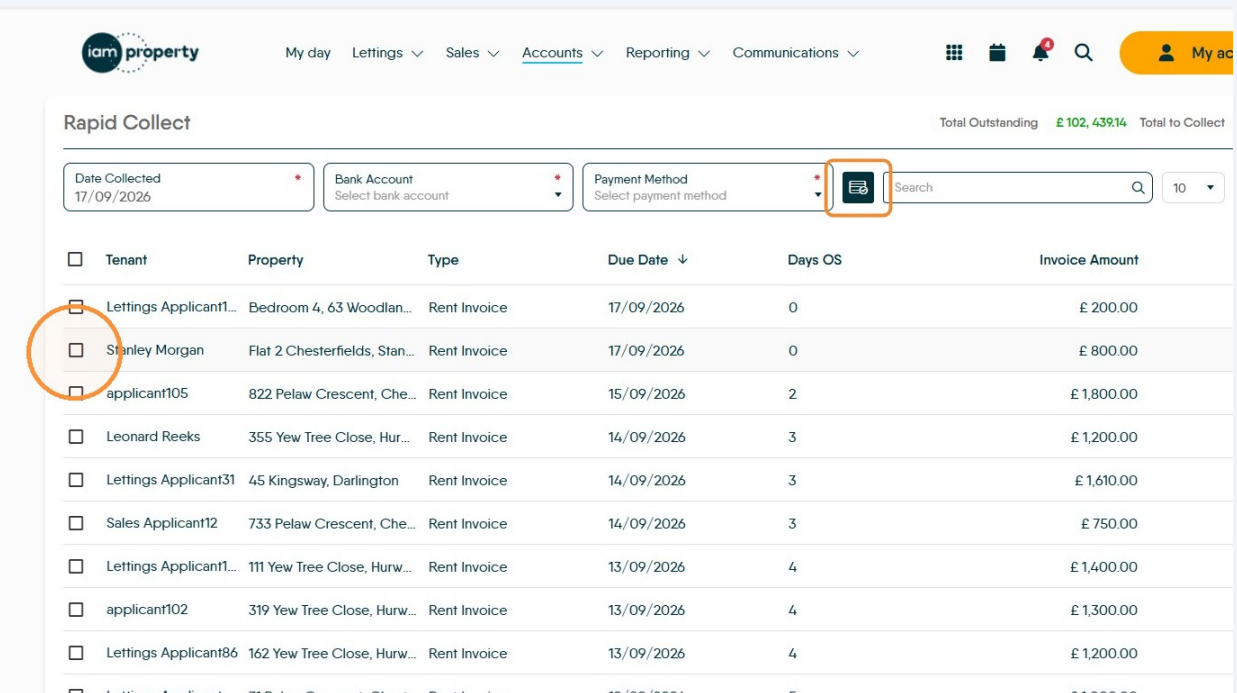
11 Return to the **Rapid Collect** screen to collect the updated rent amount.



The screenshot shows the 'Invoices' screen with the 'Rent Invoice' tab active. The table below lists the invoices:

Record Type	Record	Property	Invoice Type	Description	Due ...	Invoice Amount
Tenant	Lettings Applicant188	Bedroom 4, 63 Woodlan...	Rent Invoice	Mr Lettings Applicant188...	17/09/2026	£ 200.00
Tenant	Stanley Morgan	Flat 2 Chesterfields, Stan...	Rent Invoice	Mr Stanley Morgan (17/0...	17/09/2026	£ 800.00
Tenant	applicant105	822 Pelaw Crescent, Che...	Rent Invoice	applicant105 (15/09/202...	15/09/2026	£ 1,800.00
Tenant	Leonard Reeks	355 Yew Tree Close, Hur...	Rent Invoice	Mr Leonard Reeks (14/09...	14/09/2026	£ 1,200.00
Tenant	Lettings Applicant31	45 Kingsway, Darlington	Rent Invoice	Miss Lettings Applicant3...	14/09/2026	£ 1,610.00
Tenant	Sales Applicant12	733 Pelaw Crescent, Che...	Rent Invoice	Mr Sales Applicant12 (14/...	14/09/2026	£ 750.00
Tenant	Lettings Applicant103	111 Yew Tree Close, Hurw...	Rent Invoice	Mr Lettings Applicant103...	13/09/2026	£ 1,400.00
Tenant	applicant102	319 Yew Tree Close, Hurw...	Rent Invoice	Mr applicant102 (13/09/...	13/09/2026	£ 1,300.00
Tenant	Lettings Applicant86	162 Yew Tree Close, Hurw...	Rent Invoice	Lettings Applicant86 (13/...	13/09/2026	£ 1,200.00
Tenant	Lettings Applicant34	71 Pelaw Crescent, Chest...	Rent Invoice	Mrs Lettings Applicant34...	12/09/2026	£ 1,000.00

12 Click the checkboxes next to the rents you are collecting. Select the rent to collect, set the Bank and payment method details and click the collect icon.



The screenshot shows the 'Rapid Collect' screen. The 'Date Collected' is set to 17/09/2026. The table below lists the tenants and their invoice details:

☐	Tenant	Property	Type	Due Date	Days OS	Invoice Amount
☒	Lettings Applicant1...	Bedroom 4, 63 Woodlan...	Rent Invoice	17/09/2026	0	£ 200.00
☒	Stanley Morgan	Flat 2 Chesterfields, Stan...	Rent Invoice	17/09/2026	0	£ 800.00
☒	applicant105	822 Pelaw Crescent, Che...	Rent Invoice	15/09/2026	2	£ 1,800.00
☐	Leonard Reeks	355 Yew Tree Close, Hur...	Rent Invoice	14/09/2026	3	£ 1,200.00
☐	Lettings Applicant31	45 Kingsway, Darlington	Rent Invoice	14/09/2026	3	£ 1,610.00
☐	Sales Applicant12	733 Pelaw Crescent, Che...	Rent Invoice	14/09/2026	3	£ 750.00
☐	Lettings Applicant1...	111 Yew Tree Close, Hurw...	Rent Invoice	13/09/2026	4	£ 1,400.00
☐	applicant102	319 Yew Tree Close, Hurw...	Rent Invoice	13/09/2026	4	£ 1,300.00
☐	Lettings Applicant86	162 Yew Tree Close, Hurw...	Rent Invoice	13/09/2026	4	£ 1,200.00
☐	Lettings Applicant	71 Pelaw Crescent, Chest...	Rent Invoice	12/09/2026	5	£ 1,000.00