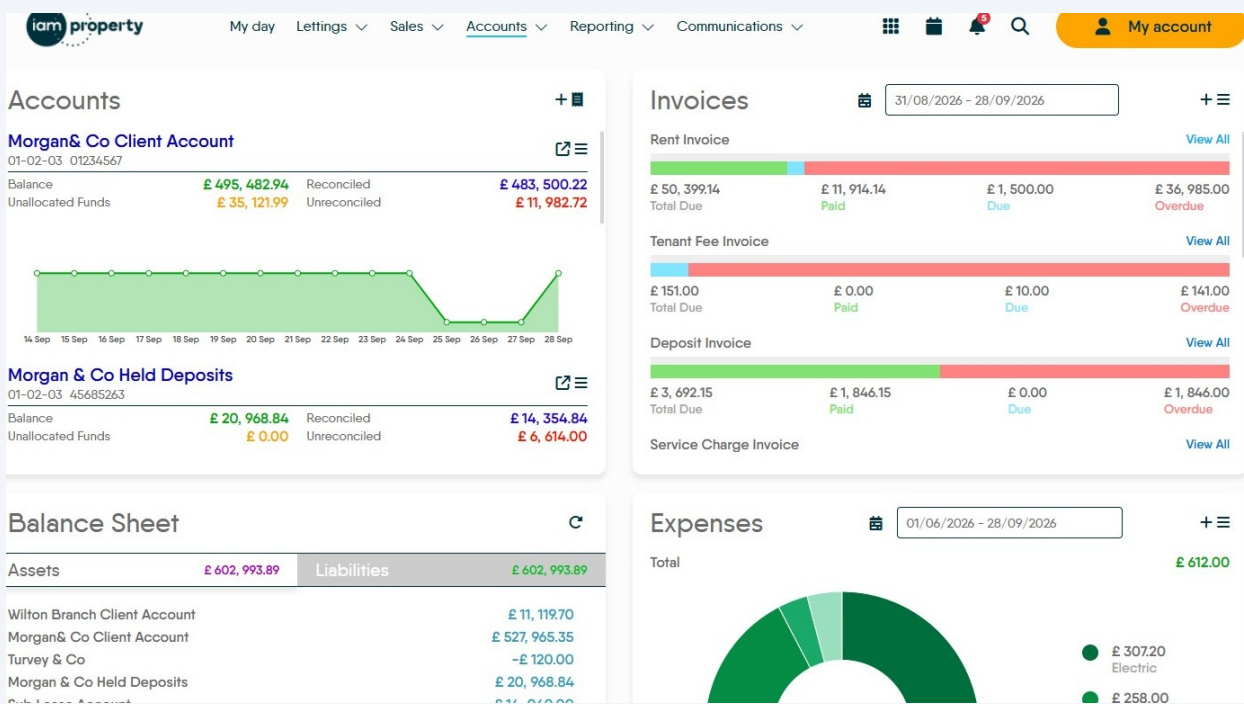


How to Delete Invoices in CRM Accounts



If you have Invoices that have been created in CRM, that you no longer require these invoices can be deleted. This guide will show the easiest way to delete invoices.

1 To start navigate to the **Accounts dashboard**.



Invoice Selection

2

In the **Invoices** tile you can select the type of Invoice that you are deleting. In this case we are looking at Rent Invoices. Click **"View All"** for Rent Invoice.

The screenshot shows the iamproperty CRM dashboard. The top navigation bar includes 'My day', 'Lettings', 'Sales', 'Accounts', 'Reporting', and 'Communications'. The 'Accounts' section is active, showing a balance sheet for 'Co Client Account' and 'Co Held Deposits'. The 'Invoices' tile is highlighted with a red circle around the 'View All' link for Rent Invoices. The 'Invoices' tile shows a summary of invoices for the period 31/08/2026 - 28/09/2026, including Rent Invoice, Tenant Fee Invoice, Deposit Invoice, and Service Charge Invoice. The 'Expenses' tile is also visible, showing a total of £612.00 for the period 01/06/2026 - 28/09/2026.

3

If you need to sort the records you can either click the header line of the column to sort the data by ascending (or descending) order or you can use the 'Search' field.

The screenshot shows the iamproperty CRM dashboard with the 'Outstanding Invoices' table. The table has columns for 'Invoice No.', 'Record Type', 'Record', 'Property', 'Invoice Type', 'Description', and 'Due Date'. The 'Record' column header is highlighted with a red circle. The 'Search' field is also highlighted with a red circle. The table lists several invoices, including CRM - 843, CRM - 843, CRM - 843, CRM - 843, CRM - 843, CRM - 843, CRM - 843, and CRM - 843. The 'Total Outstanding' is £110,869.14 and the 'Total to Pay' is £110,869.14.

4

When you have found the data/invoices you want to delete, click into the checkbox to the left of the data line.

iamproperty CRM movebutler

My day Lettings Sales Accounts Reporting Communications

Outstanding Invoices All Rent Invoice Total Outstanding £110,869.14 Total to Pay

Payment Date 28/09/2026 Payment Method Select payment method Bank Account Select payment account Search 10

Invoice No.	Record Type	Record ↑	Property	Invoice Type	Description	Due Date
☐ CRM - 873	Tenant	Applicant41	Bedroom 3, 63 Woodlan...	Rent Invoice	Applicant41 (24/07/202...	24/07/2026
☐ CRM - 876	Tenant	Applicant41	Bedroom 3, 63 Woodlan...	Rent Invoice	Applicant41 (31/07/2026...	31/07/2026
☐ CRM - 877	Tenant	Applicant41	Bedroom 3, 63 Woodlan...	Rent Invoice	Applicant41 (07/08/202...	07/08/20...
☐ CRM - 877	Tenant	Applicant41	Bedroom 3, 63 Woodlan...	Rent Invoice	Applicant41 (14/08/2026...	14/08/2026
☐ CRM - 927	Tenant	Applicant41	Bedroom 3, 63 Woodlan...	Rent Invoice	Applicant41 (21/08/2026...	21/08/2026
☐ CRM - 930	Tenant	Applicant41	Bedroom 3, 63 Woodlan...	Rent Invoice	Applicant41 (28/08/202...	28/08/20...
☐ CRM - 940	Tenant	Applicant41	Bedroom 3, 63 Woodlan...	Rent Invoice	Applicant41 (04/09/202...	04/09/20...
☐ CRM - 941	Tenant	Applicant41	Bedroom 3, 63 Woodlan...	Rent Invoice	Applicant41 (11/09/2026 ...	11/09/2026
☐ CRM - 943	Tenant	Applicant41	Bedroom 3, 63 Woodlan...	Rent Invoice	Applicant41 (18/09/2026...	18/09/2026

Outstanding Invoices All Rent Invoice Total Outstanding £110,869.14 Total to Pay

Payment Date 28/09/2026 Payment Method Select payment method Bank Account Select payment account Search 10

Invoice No.	Record Type	Record ↑	Property	Invoice Type	Description	Due Date
☒ CRM - 873	Tenant	Applicant41	Bedroom 3, 63 Woodlan...	Rent Invoice	Applicant41 (24/07/202...	24/07/2026
☒ CRM - 876	Tenant	Applicant41	Bedroom 3, 63 Woodlan...	Rent Invoice	Applicant41 (31/07/2026...	31/07/2026
☒ CRM - 877	Tenant	Applicant41	Bedroom 3, 63 Woodlan...	Rent Invoice	Applicant41 (07/08/202...	07/08/20...
☒ CRM - 877	Tenant	Applicant41	Bedroom 3, 63 Woodlan...	Rent Invoice	Applicant41 (14/08/2026...	14/08/2026
☐ CRM - 927	Tenant	Applicant41	Bedroom 3, 63 Woodlan...	Rent Invoice	Applicant41 (21/08/2026...	21/08/2026
☐ CRM - 930	Tenant	Applicant41	Bedroom 3, 63 Woodlan...	Rent Invoice	Applicant41 (28/08/202...	28/08/20...
☐ CRM - 940	Tenant	Applicant41	Bedroom 3, 63 Woodlan...	Rent Invoice	Applicant41 (04/09/202...	04/09/20...
☐ CRM - 941	Tenant	Applicant41	Bedroom 3, 63 Woodlan...	Rent Invoice	Applicant41 (11/09/2026 ...	11/09/2026
☐ CRM - 943	Tenant	Applicant41	Bedroom 3, 63 Woodlan...	Rent Invoice	Applicant41 (18/09/2026...	18/09/2026
☐ CRM - 945	Tenant	Applicant41	Bedroom 3, 63 Woodlan...	Rent Invoice	Applicant41 (25/09/202...	25/09/2026

Invoices x

5 Then click the **Delete** icon.

The screenshot shows the iamproperty CRM interface. At the top, there are tabs for 'iamproperty', 'CRM', 'movebutler', and 'iamsok'. Below these are navigation links for 'Sales', 'Accounts', 'Reporting', and 'Communications'. A 'My account' button is on the right. The main section displays 'Rent Invoice' with a 'Total Outstanding' of £110,869.14 and a 'Total to Pay' of £750.00. Below this is a table with columns: Record, Property, Invoice Type, Description, and Due Date. The table contains four rows of data for 'Applicant41'. A 'Delete' icon (a trash can) is circled in orange in the top right corner of the table area.

Record	Property	Invoice Type	Description	Due Date
Applicant41	Bedroom 3, 63 Woodlan...	Rent Invoice	Applicant41 (24/07/202...	24/07/2026
Applicant41	Bedroom 3, 63 Woodlan...	Rent Invoice	Applicant41 (31/07/2026...	31/07/2026
Applicant41	Bedroom 3, 63 Woodlan...	Rent Invoice	Applicant41 (07/08/202...	07/08/20...
Applicant41	Bedroom 3, 63 Woodlan...	Rent Invoice	Applicant41 (14/08/2026...	14/08/2026

6 Click **Delete** in the confirmation dialog.

The screenshot shows the iamproperty CRM interface with a confirmation dialog box open. The dialog box has the title 'Delete Linked Transactions?' and the text 'Are you sure you want to delete this transaction?'. There are two buttons: 'Cancel' and 'Delete'. The 'Delete' button is circled in orange. The background shows the same table as in the previous screenshot, but it is dimmed.

Invoice No.	Record Type	Record	Property	Invoice Type	Description	Due Date
M - 873	Tenant	Applicant41	Bedroom 3, 63 Woodlan...	Rent Invoice	Applicant41 (24/07/202...	24/07/2026
M - 876	Tenant	Applicant41	Bedroom 3, 63 Woodlan...	Rent Invoice	Applicant41 (31/07/2026...	31/07/2026
M - 877	Tenant	Applicant41	Bedroom 3, 63 Woodlan...	Rent Invoice	Applicant41 (07/08/202...	07/08/20...
M - 877	Tenant	Applicant41	Bedroom 3, 63 Woodlan...	Rent Invoice	Applicant41 (14/08/2026...	14/08/2026
M - 927	Tenant	Applicant41	Bedroom 3, 63 Woodlan...	Rent Invoice	Applicant41 (21/08/2026...	21/08/2026
M - 930	Tenant	Applicant41	Bedroom 3, 63 Woodlan...	Rent Invoice	Applicant41 (28/08/202...	28/08/20...
M - 940	Tenant	Applicant41	Bedroom 3, 63 Woodlan...	Rent Invoice	Applicant41 (04/09/202...	04/09/20...
M - 941	Tenant	Applicant41	Bedroom 3, 63 Woodlan...	Rent Invoice	Applicant41 (11/09/2026 ...	11/09/2026
M - 943	Tenant	Applicant41	Bedroom 3, 63 Woodlan...	Rent Invoice	Applicant41 (18/09/2026...	18/09/2026
M - 945	Tenant	Applicant41	Bedroom 3, 63 Woodlan...	Rent Invoice	Applicant41 (25/09/202...	25/09/2026

Rapid Collect Navigation

7

All that will be left is the invoices that were not selected, these can now be collected against in the Rapid Collect or Bank Import screens.

Outstanding Invoices

All **Rent Invoice** Total Outstanding £110,119.14 Total to Pay

Payment Date: 28/09/2026 Payment Method: Select payment method Bank Account: Select payment account

☐	Invoice No.	Record Type	Record ↑	Property	Invoice Type	Description	Due Date
☐	CRM - 930	Tenant	Applicant41	Bedroom 3, 63 Woodlan...	Rent Invoice	Applicant41 (28/08/202...	28/08/20...
☐	CRM - 940	Tenant	Applicant41	Bedroom 3, 63 Woodlan...	Rent Invoice	Applicant41 (04/09/202...	04/09/20...
☐	CRM - 941	Tenant	Applicant41	Bedroom 3, 63 Woodlan...	Rent Invoice	Applicant41 (11/09/2026 ...	11/09/2026
☐	CRM - 943	Tenant	Applicant41	Bedroom 3, 63 Woodlan...	Rent Invoice	Applicant41 (18/09/2026 ...	18/09/2026
☐	CRM - 945	Tenant	Applicant41	Bedroom 3, 63 Woodlan...	Rent Invoice	Applicant41 (25/09/202...	25/09/2026
☐	CRM - 880	Tenant	Audrey Morgan	Flat 14 Westpoint, Northu...	Rent Invoice	Mrs Audrey Morgan (19/...	19/08/2026
☐	CRM - 933	Tenant	Audrey Morgan	Flat 14 Westpoint, Northu...	Rent Invoice	Mrs Audrey Morgan (02/...	02/09/20...
☐	CRM - 930	Tenant	Commercial Applicant	Unit 3b Enterprise House,...	Rent Invoice	Mr Commercial Applica...	02/08/20...

8

Click the Tenant menu.

Accounts dashboard General Landlord **Tenant**

Payment Date: 28/09/2026 Payment Method: Select payment method Bank Account: Select payment account

☐	Invoice No.	Record Type	Record ↑	Property	Invoice Type	Description	Due Date
☐	CRM - 930	Tenant	Applicant41	Bedroom 3, 63 Woodlan...	Rent Invoice	Applicant41 (28/08/202...	28/08/20...
☐	CRM - 940	Tenant	Applicant41	Bedroom 3, 63 Woodlan...	Rent Invoice	Applicant41 (04/09/202...	04/09/20...
☐	CRM - 941	Tenant	Applicant41	Bedroom 3, 63 Woodlan...	Rent Invoice	Applicant41 (11/09/2026 ...	11/09/2026
☐	CRM - 943	Tenant	Applicant41	Bedroom 3, 63 Woodlan...	Rent Invoice	Applicant41 (18/09/2026 ...	18/09/2026
☐	CRM - 945	Tenant	Applicant41	Bedroom 3, 63 Woodlan...	Rent Invoice	Applicant41 (25/09/202...	25/09/2026
☐	CRM - 880	Tenant	Audrey Morgan	Flat 14 Westpoint, Northu...	Rent Invoice	Mrs Audrey Morgan (19/...	19/08/2026
☐	CRM - 933	Tenant	Audrey Morgan	Flat 14 Westpoint, Northu...	Rent Invoice	Mrs Audrey Morgan (02/...	02/09/20...
☐	CRM - 930	Tenant	Commercial Applicant	Unit 3b Enterprise House,...	Rent Invoice	Mr Commercial Applica...	02/08/20...

9

For example. Click Rapid Collect. The only Invoices showing for 'Applicant41' are those we didnt delete.

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My day Lettings Sales Accounts Reporting Communications

Accounts dashboard General Landlord **Tenant**

Tenant

Collect Rent

Rapid Collect

Service Charges

Invoice Import

Rent Guarantee

Transaction Sheet

CRM	Tenant	Applicant	Property	Type	Invoice	Due Date
CRM - 945	Tenant	Applicant41	Bedroom 3, 63 Woodlan...	Rent Invoice	Applicant41 (25/09/202...	25/09/2026
CRM - 880	Tenant	Audrey Morgan	Flat 14 Westpoint, Northu...	Rent Invoice	Mrs Audrey Morgan (19/...	19/08/2026
CRM - 933	Tenant	Audrey Morgan	Flat 14 Westpoint, Northu...	Rent Invoice	Mrs Audrey Morgan (02/...	02/09/20...
CRM - 930	Tenant	Commercial Applicant	Unit 3b Enterprise House...	Rent Invoice	Mr Commercial Applica...	02/08/20...

iamproperty My day Lettings Sales Accounts Reporting Communications

Rapid Collect Total Outstanding **£ 110,119.14** Total to Collect

Date Collected
28/09/2026

Bank Account
Select bank account

Payment Method
Select payment method

Search

10

Tenant	Property	Type	Due Date	Days OS	Invoice Amount
Applicant41	Bedroom 3, 63 Woodlan...	Rent Invoice	28/08/2026	31	£ 150.00
Applicant41	Bedroom 3, 63 Woodlan...	Rent Invoice	04/09/2026	24	£ 150.00
Applicant41	Bedroom 3, 63 Woodlan...	Rent Invoice	11/09/2026	17	£ 150.00
Applicant41	Bedroom 3, 63 Woodlan...	Rent Invoice	18/09/2026	10	£ 150.00
Applicant41	Bedroom 3, 63 Woodlan...	Rent Invoice	25/09/2026	3	£ 150.00
applicant 79	18 Kingsway, Darlington	Rent Invoice	27/08/2026	32	£ 1,000.00
applicant 79	18 Kingsway, Darlington	Rent Invoice	27/09/2026	1	£ 1,000.00
applicant100	10 Kingsway, Darlington	Rent Invoice	09/08/2026	50	£ 950.00
applicant100	10 Kingsway, Darlington	Rent Invoice	09/09/2026	19	£ 950.00
applicant102	319 Yew Tree Close, Hurw...	Rent Invoice	13/08/2026	46	£ 1,300.00