

How To...View Tenancy Details for a Property



This guide provides a straightforward process for accessing detailed tenancy information for a specific property, property managers can efficiently manage their rental agreements.

By following these steps, users can quickly navigate the system to view important details about tenants and their agreements, which is essential for effective property management.

It's an invaluable resource for anyone involved in property rentals who needs to stay organized and informed.



There are a few ways to view the Tenancy details. The quickest way (and the way we would advise) is to use the global search option and search the tenant or property name, then select the Tenancy tile that shows on screen.

Alternatively you can find the tenancy from the tenant record, the property record, even from the Landlord record. We will look at Tenant and Property record in this guide.

1

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

Simplest and Best way to find the Tenancy record.

2

From the My Day Screen. Click into the 'Search all records' field and type the name of the tenant or property. Click the magnifying glass to search.

Welcome back, Training

+ Add New Record

📅 View Property Management

🔗 Visit Help Centre

Search all records

 🔍

Today's events

Time	Name
12:00	Test test

My tasks

	Status	Name	Priority	Start date	Due date
⋮	🚩 Not Started	<u>Call Landlord</u>	🔴 High	15/Nov/2024	15/Nov/2024
⋮	🚩 Not Started	<u>test</u>	🔴 High	27/Nov/2024	27/Nov/2024
⋮	🚩 Not Started	<u>Call Landlord</u>	🟡 Medium	12/Dec/2024	12/Dec/2024
⋮	🚩 Not Started	<u>Call back</u>	🔴 High	03/Jan/2025	03/Jan/2025

Welcome back, Training

+ Add New Record

📅 View Property Management

🔗 Visit Help Centre

Search all records

 🔍

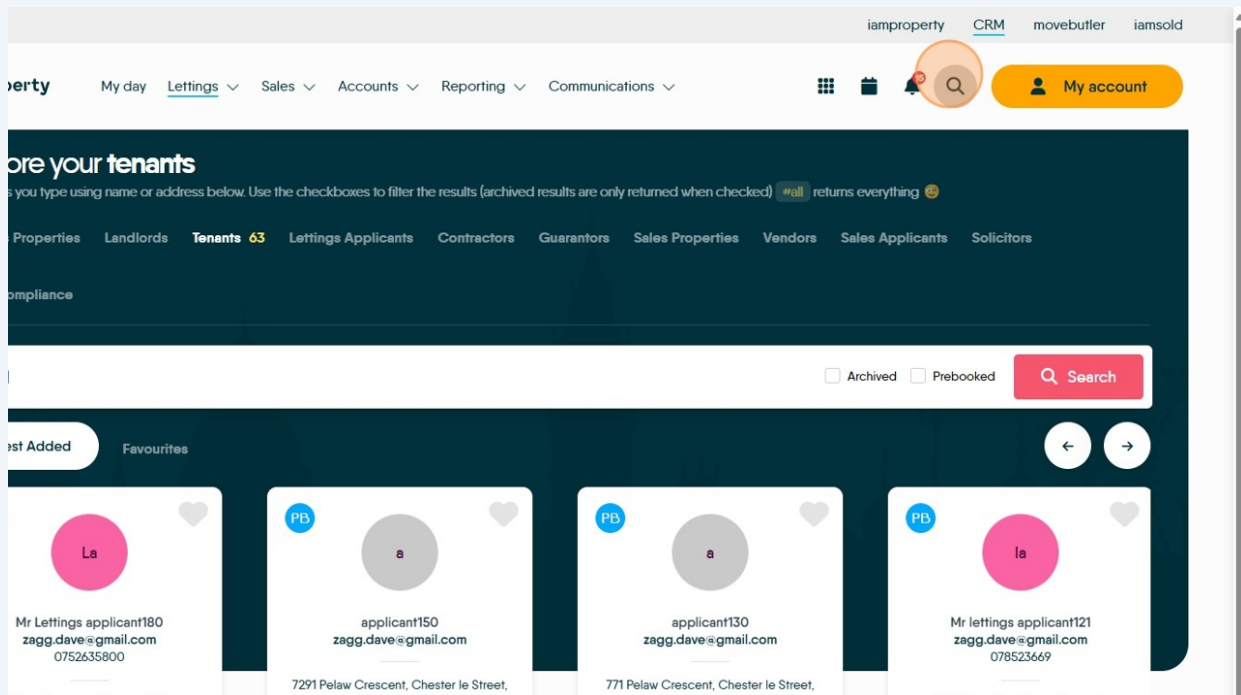
Today's events

Name
Test test

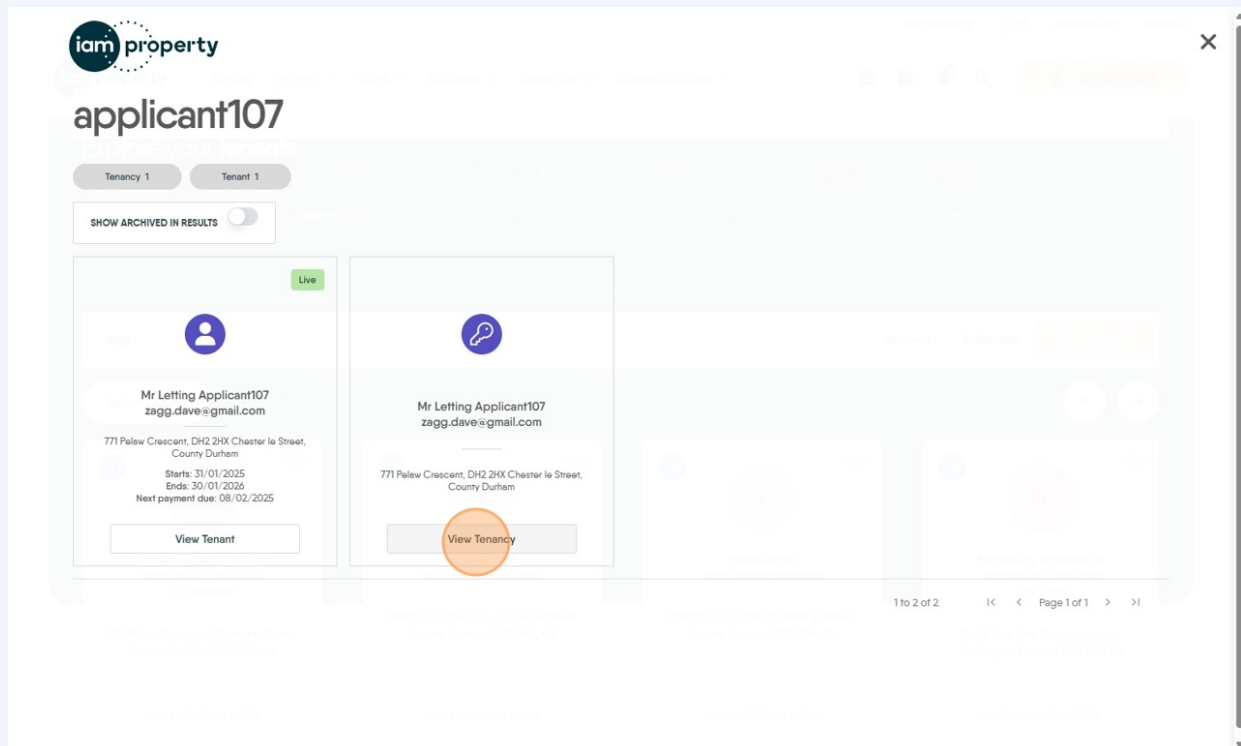
My tasks

	Status	Name	Priority	Start date	Due date
⋮	🚩 Not Started	<u>Call Landlord</u>	🔴 High	15/Nov/2024	15/Nov/2024
⋮	🚩 Not Started	<u>test</u>	🔴 High	27/Nov/2024	27/Nov/2024
⋮	🚩 Not Started	<u>Call Landlord</u>	🟡 Medium	12/Dec/2024	12/Dec/2024
⋮	🚩 Not Started	<u>Call back</u>	🔴 High	03/Jan/2025	03/Jan/2025

3 If you are not in the My Day screen, use global search. Click the Search icon



4 Type the Tenant name or the Property details, press enter. Click "View Tenancy" to jump to the tenancy record.



5 You are now in the Tenancy Record.

The screenshot shows the 'iam property' CRM interface. The top navigation bar includes 'My day', 'Lettings', 'Sales', 'Accounts', 'Reporting', and 'Communications'. A sidebar on the left lists various functions: Details, Tenants, Checklist, Renewals Checklist, Compliance, Rent Insurance, Information, Documents, Journal, and E-Sign. The main content area displays the 'Tenancy Record' for a specific property, '822 Pelaw Crescent, Chester le Street'. It includes a header with the applicant's name 'applicant105' and email 'zagg.dave@gmail.com', and a status 'Warning'. Below this, there are fields for 'Reference', 'Negotiator' (Training Dave), 'Branch' (Morgan & Co), and 'Status' (Current). The 'Tenancy Dates' section shows five key dates: Tenancy Start (15/01/2025), Tenancy End (14/01/2026), Renewal Start (15/01/2025), Vacating Date (12/12/2024), and Visit Next Due (12/12/2024 12:00). The 'Tenancy Details' section includes 'Lease Period' (12 Month Shorthold), 'Relocation Agent', and 'Agreement Name' (applicant105). The 'General Information' section includes 'With Effect Break', 'Notice Date', and 'Break Clause' (B, I, U, and a grid icon).



From here down are the alternate ways to find a Tenancy from various places on the CRM. The vast majority of times you will not need these options, we include them for completeness and clarity.

Finding the Tenancy From Property or Tenant Search Views

6 Click "Lettings"

The screenshot shows the iamproperty CRM dashboard. The top navigation bar includes the iamproperty logo, a 'My day' dropdown, a 'Lettings' dropdown (highlighted with an orange circle), and other dropdowns for Sales, Accounts, Reporting, and Communications. On the right, there are icons for a grid, calendar, notifications, and search, along with a 'My acc' button. The main heading is 'Welcome back, Training'. Below this are three buttons: '+ Add New Record' (orange), 'View Property Management' (green), and 'Visit Help Centre' (blue). A search bar labeled 'Search all records' is present. The dashboard is divided into two main sections: 'Today's events' and 'My tasks'.

Today's events

Time	Name
12:00	Test test

My tasks

Status	Name	Priority	Start date	Due date
Not Started	Call Landlord	High	15/Nov/2024	15/Nov/2024
Not Started	test	High	27/Nov/2024	27/Nov/2024
Not Started	Call Landlord	Medium	12/Dec/2024	12/Dec/2024

7 Click "General"

This screenshot is identical to the one above, showing the iamproperty CRM dashboard with the 'Lettings' menu highlighted. The main heading is 'Welcome back, Training'. Below this are three buttons: '+ Add New Record' (orange), 'View Property Management' (green), and 'Visit Help Centre' (blue). A search bar labeled 'Search all records' is present. The dashboard is divided into two main sections: 'Today's events' and 'My tasks'.

Today's events

Time	Name
12:00	Test test

My tasks

Status	Name	Priority	Start date	Due date
Not Started	Call Landlord	High	15/Nov/2024	15/Nov/2024
Not Started	test	High	27/Nov/2024	27/Nov/2024
Not Started	Call Landlord	Medium	12/Dec/2024	12/Dec/2024

8

Click "Properties" or click "Tenants"

The screenshot displays the iamproperty CRM dashboard. The top navigation bar includes the iamproperty logo, a user profile icon, and a search bar. The main navigation menu lists: My day, Lettings, Sales, Accounts, Reporting, and Communications. The sub-navigation menu shows: Lettings dashboard, General, and Property management. The 'General' section is active, displaying a grid of links: Property Match, Landlords, Applicants, Reports, Applicant Match, Contractors, E-sign, Letzone, Guarantors, Upload to portals, and Marketing toolkit. The 'Properties' link is highlighted with an orange circle. Below the grid, a table of properties is visible, with the 'Properties' link also highlighted with an orange circle. The table has columns for status, name, priority, and dates.

Status	Name	Priority	Start Date	End Date
Not Started	Test	High	27/Nov/2024	27/Nov/2024
Not Started	Call Landlord	Medium	12/Dec/2024	12/Dec/2024
Not Started	Call back	High	03/Jan/2025	03/Jan/2025
Not Started	Make Tea	High	07/Jan/2025	07/Jan/2025

9 Click "#all" to view all of the records.

The screenshot shows the 'Explore your lettings properties' page. At the top, there's a navigation bar with 'My day', 'Lettings', 'Sales', 'Accounts', 'Reporting', and 'Communications'. A search bar is on the right with a 'My account' button. Below the navigation bar, the page title 'Explore your lettings properties' is followed by a search prompt: 'Search as you type using name or address below. Use the checkboxes to filter the results (archived results are only returned when checked)'. A filter bar contains checkboxes for 'Available', 'Let Agreed', 'Appraisal', and 'Archived', along with a 'Search' button. Below the search bar, there's a section for 'Lettings Properties' with a count of 79. A list of property cards is shown, each with a 'Lettings' label, an 'Available' status, and a price. The card on the right shows a house and a price of '1,400 PCM'. A red circle highlights the '#all' filter button in the top right corner of the filter bar.

10 Then from the list select the details of the tenant or property you want to look at.

The screenshot shows the 'Explore your lettings properties' page with a table of property details. The table has columns for 'Property Address', 'Reference', 'Rent', 'Town', 'Landlord', and 'Tenant'. The table lists several properties, including 'suspense Yew Tree Close, Hurworth, Darlington, Durham, DL2 2HX' and '806 Pelaw Crescent, Chester le Street, County Durham, DH2 2HX'. A red circle highlights the 'Tenant' column header.

Property Address	Reference	Rent	Town	Landlord	Tenant
suspense Yew Tree Close, Hurworth, Darlington, Durham, DL2 2HX		0	Darlington	David-George Morgan	
806 Pelaw Crescent, Chester le Street, County Durham, DH2 2HX		0	Chester le Street	Letting Landlord	
735 Pelaw Crescent, Chester le Street, County Durham, DH2 2HX		0	Chester le Street	Landlord5	
759 Pelaw Crescent, Chester le Street, County Durham, DH2 2HX		1,400 PCM	Chester le Street	letting landlord34	
7291 Pelaw Crescent, Chester le Street, County Durham, DH2 2HX		1,300 PCM	Chester le Street	sales vendor30	
771 Pelaw Crescent, Chester le Street, County Durham, DH2 2HX		1,500 PCM	Chester le Street	Lettings landlord32	
771 Pelaw Crescent, Chester le Street, County Durham, DH2 2HX		1,500 PCM	Chester le Street	Lettings Landlord28	Letti



Tip! The quickest way is from the Tenant record.

11

In the Explore my Tenants screen, select the tenant you want.

'#all' returns 63 tenants

Tenant Name	Reference	Property Address	Rent Amount	Phone
Mr Lettings applicant180 (PB)		759 Pelaw Crescent, Chester le Street, County Durham, DH2 2HX, UK	1,400 PCM	075263
applicant150 (PB)		7291 Pelaw Crescent, Chester le Street, County Durham, DH2 2HX, UK	1,300 PCM	
applicant130 (PB)		771 Pelaw Crescent, Chester le Street, County Durham, DH2 2HX, UK	1,500 PCM	
Mr Lettings applicant121 (PB)		345 5 Yew Tree Close, Hurworth, Darlington, Durham, DL2 2HX, UK	1,100 PCM	078523
Mr Letting Applicant107		771 Pelaw Crescent, Chester le Street, County Durham, DH2 2HX, UK	1,600 PCM	
Ms Letitia Applicant106 (PB)		63 Woodland Road, Darlington, County Durham, DL3 7BQ, UK	150 PCM	072154
applicant105		822 Pelaw Crescent, Chester le Street, County Durham, DH2 2HX, UK	1,800 PCM	
Mr Lettings applicant104 (PB)		16 Yew Tree Close, Hurworth, Darlington, Durham, DL2 2HX, UK	1,250 PCM	05642
Ms Lettings applicant104		63 Woodland Road, Darlington, County Durham, DL3 7BQ, UK	2,000 PCM	02458
Mr applicant102		319 Yew Tree Close, Hurworth, Darlington, Durham, DL2 2HX, UK	1,300 PCM	
Mr Lettings Applicant103		111 Yew Tree Close, Hurworth, Darlington, Durham, DL2 2HX, UK	1,400 PCM	
lettings applicant102		919 Pelaw Crescent, Chester le Street, County Durham, DH2 2HX, UK	1,400 PCM	

12 This will take you to the Tenant record, from here Click "Tenancy"

The screenshot shows the Property CRM interface. The top navigation bar includes 'My day', 'Lettings', 'Sales', 'Accounts', 'Reporting', and 'Communications'. The left sidebar lists various property-related tasks. The main content area displays tenant information for 'Mr Letting Applicant107' at '771 Pelaw Crescent, Chester le Street'. A blue circle highlights the 'Tenancy' button in the top right corner of the tenant record header. Below the header, there are fields for 'Reference', 'Negotiator' (Training Dave), 'Branch' (Morgan & Co), and 'Status' (Prebooked). The 'Tenant Rent Details' section shows a table with columns for Rent, Deposit, Holding Deposit, Collection Day, and Next Rent Due.

Rent	Deposit	Holding Deposit	Collection Day	Next Rent Due
£1600.00	£1846.00	£369.00	Same Day	08/02/2025

13 You are now at the Tenancy record.

The screenshot shows the 'Tenancy' record details for 'Mr Letting Applicant107' at '771 Pelaw Crescent, Chester le Street'. The 'Status' is 'Current'. The 'Tenancy Dates' section shows a table with columns for Tenancy Start, Tenancy End, Renewal Start, Vacating Date, and Visit Next Due. The 'Tenancy Details' section shows 'Lease Period' (12 Month Shorthold) and 'Relocation Agent'. The 'General Information' section shows 'With Effect Break' and 'Notice Date'.

Tenancy Start	Tenancy End	Renewal Start	Vacating Date	Visit Next Due
31/01/2025	30/01/2026	31/01/2025	19/12/2024	19/12/2024 12:00

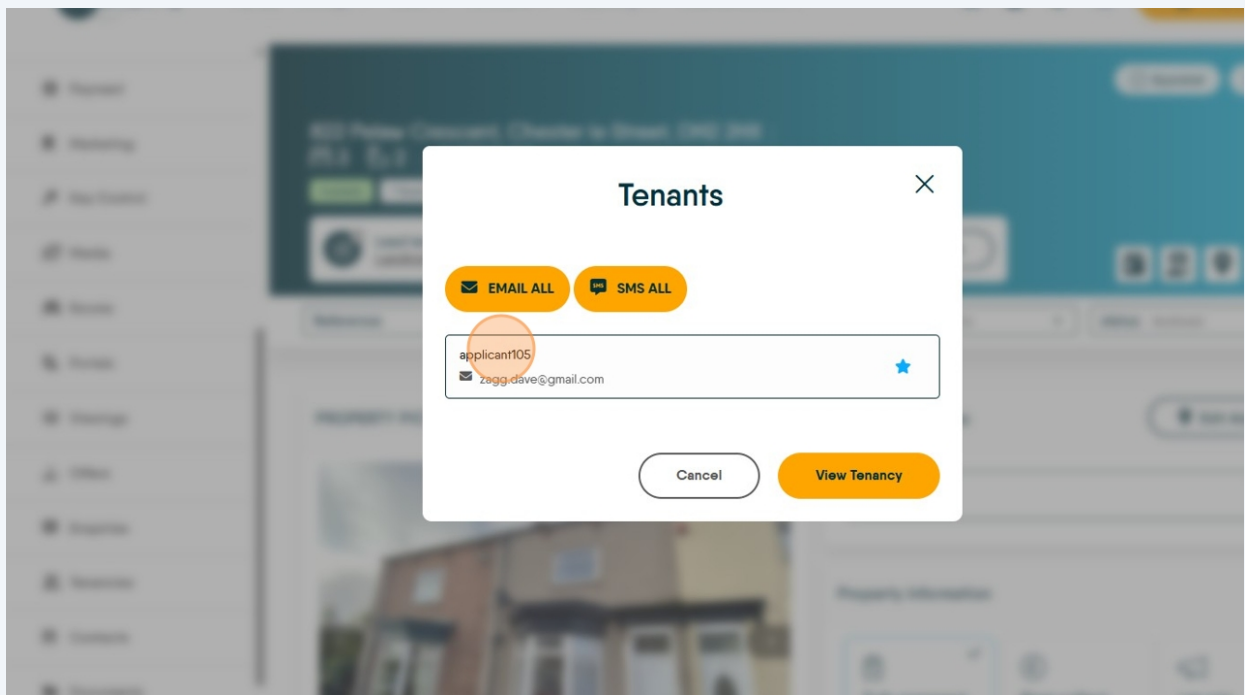
Tenancy Details	General Information
Lease Period: 12 Month Shorthold	With Effect Break
Relocation Agent	Notice Date

Viewing Tenancy details from a Property Record

14 Click "View tenants"



15 To go to the Tenant record, click on the Tenant name



16

This will take you to the tenant record, from there click "Tenancy" to move to the tenancy record.

The screenshot shows the iamproperty CRM interface. The top navigation bar includes links for iamproperty, CRM, movebutler, and iamsold. The sidebar on the left displays financial data: £1800.00 Monthly, 15 Feb 2025, and £0.00. The main content area shows the tenant record for 822 Pelaw Crescent, Chester le Street. The tenant's email is applicant105@zaggs.dave@gmail.com. The status is Prebooked. The tenant rent details are as follows:

Rent	Deposit	Holding Deposit	Collection Day	Next Rent Due
£1800.00	£1700.00	£415.38	Same Day	15/02/2025

The Rent Period is also indicated.

17

You are now in the Tenancy Record. to return to the Property, click on the address.

The screenshot shows the iamproperty CRM interface in the Tenancy Record view. The top navigation bar includes links for iamproperty, CRM, movebutler, and iamsold. The sidebar on the left displays tenant details: Total Rent £1800.00, Total Deposit £1700.00, and Status Live. The main content area shows the tenancy record for 822 Pelaw Crescent, Chester le Street. The tenant's email is applicant105@zaggs.dave@gmail.com. The status is Current. The tenancy dates are as follows:

Tenancy Start	Tenancy End	Renewal Start	Vacating Date	Visit Next Due
15/01/2025	14/01/2026	15/01/2025	12/12/2024	12/12/2024 12:00

The Tenancy Details section includes:

- Lease Period: 12 Month Shorthold
- Relocation Agent
- Agreement Name: applicant105

The General Information section includes:

- With Effect Break
- Notice Date
- Break Clause: B, I, U, and a grid icon.

18 Click "Properties"

The screenshot shows a software interface for property management. On the left is a sidebar with a list of tabs: Properties (with a red '1' badge), Identity Confirmed (with a green checkmark), Address Confirmed (with a green checkmark), Last Contacted, Details, Checklist, Properties (highlighted with an orange circle), Tenancies, Contacts, Documents, Journal, E-Sign, and Audit. The main content area has a dark blue header with a user profile for 'Lettings Landlord28' (email: zaggy.dave@gmail.com) and status indicators: LL, VE, PROSPECT, and Warning. Below the header are filters for Reference, Negotiator (Training Dave), Branch (Morgan & Co), and Status (Active). The main form is divided into two columns: 'Personal Information' and 'Financial Information'. The 'Personal Information' column contains fields for Title (Mr), Forename (Lettings), Surname (Landlord28), Company Name, Website, Phone Number, Work phone, Mobile phone, Email Address (zaggy.dave@gmail.com), Salutation (Mr Landlord28), Agreement Name (Mr Lettings Landlord28), and Source. The 'Financial Information' column contains fields for Overseas (toggle), Tax Enabled, Exclude From Payments, Registration No, CNR No, CNR Approval Date (19/12/2024), Tax Rate (0.00), VAT Registration No, HMRC Due Date (19/12/2024), Statement (No Statement), and Send Statement Via (Email).

Personal Information		Financial Information	
Title Mr	Forename Lettings	Overseas <input type="checkbox"/>	Tax Enabled <input type="checkbox"/>
Surname Landlord28	Company Name	Exclude From Payments <input type="checkbox"/>	
Website	Phone Number	Registration No	CNR No
Work phone	Mobile phone	CNR Approval Date 19/12/2024	Tax Rate 0.00
Email Address zaggy.dave@gmail.com	Salutation Mr Landlord28	VAT Registration No	HMRC Due Date 19/12/2024
Agreement Name Mr Lettings Landlord28	Source	Statement No Statement	Send Statement Via Email

From Property Record, Tenancies tab.

19 Click "Tenancies"

The screenshot shows the 'Properties' section of a software interface. The left sidebar has a 'Properties' tab selected. The main area features a header with user information (Lettings Landlord28, zaggy.dave@gmail.com) and status indicators (LL, VE, PROSPECT, Warning). Below the header are filters for Reference, Negotiator (Training Dave), Branch (Morgan & Co), and Status (Active). A central panel includes an 'Add property' button, a 'Sort Properties' dropdown, a search bar, and filter options for Property Style, Minimum Bedrooms (03), and Minimum Bathrooms (02). A property card for '771 Pelaw Crescent, Chester le Street' is displayed, showing a price of £1,500 pcm, 0 ratings, and details: Beds: 4, Baths: 3, Receptions: 2. The card also shows the negotiator 'Training Dave' and a date '19/12/2024'.

20 All the Tenancies current, Pre Booked and Archived can be viewed.

The screenshot shows the 'Tenancies' section of the same software interface. The left sidebar has a 'Tenancies' tab selected. The main area features a header with the same user information and status indicators. Below the header are filters for Reference, Negotiator (Training Dave), Branch (Morgan & Co), and Status (Active). A central panel includes an 'Add tenancy' button, a 'Sort Tenancies' dropdown, a search bar, and filter options for Status (Tenancy Expired, Tenancy Active). A tenancy card for '771 pelaw crescent, chest...' is displayed, showing a letting applicant '107', dates '31/01/2025' and '30/01/2026', and a small profile picture icon.

21 Click onto the small icon "LA" this will take you to the Tenant Record

Properties 1

Identity Confirmed ✓

Address Confirmed ✓

Last Contacted

Details

Checklist

Properties

Tenancies

Contacts

Documents

Journal

E-Sign

Audit

Lettings Landlord28
zaggs.dave@gmail.com

PROSPECT Warning

Reference: Negotiator: Training Dave Branch: Morgan & Co Status: Active

+ Add tenancy

Sort Tenancies

Search

Clear filters

Status

Tenancy Expired

Tenancy Active

771 pelaw crescent, chest...

Letting applicant107

31/01/2025

30/01/2026

22 Click "Tenancy" to go to the tenancy record.

iamproperty CRM movebutler iamsold

My day Lettings Sales Accounts Reporting Communications

My account

£1600.00

Monthly

8 Feb 2025

£0.00

LA Mr Letting Applicant107
zaggs.dave@gmail.com

TE Warning Set GDPR Tenancy Expiry 372 Days Tenancy→

771 Pelaw Crescent, Chester le Street Primary Tenant

Reference: Negotiator: Training Dave Branch: Morgan & Co Status: Prebooked

Tenant Rent Details

Rent	Deposit	Holding Deposit	Collection Day	Next Rent Due
£				
1600.00	1846.00	369.00	Same Day	08/02/2025

Rent Period