

# 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
⋮	<input type="checkbox"/> Not Started	<u>Call Landlord</u>	↗ High	15/Nov/2024	15/Nov/2024
⋮	<input type="checkbox"/> Not Started	<u>test</u>	↗ High	27/Nov/2024	27/Nov/2024
⋮	<input type="checkbox"/> Not Started	<u>Call Landlord</u>	▬ Medium	12/Dec/2024	12/Dec/2024
⋮	<input type="checkbox"/> 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](#)

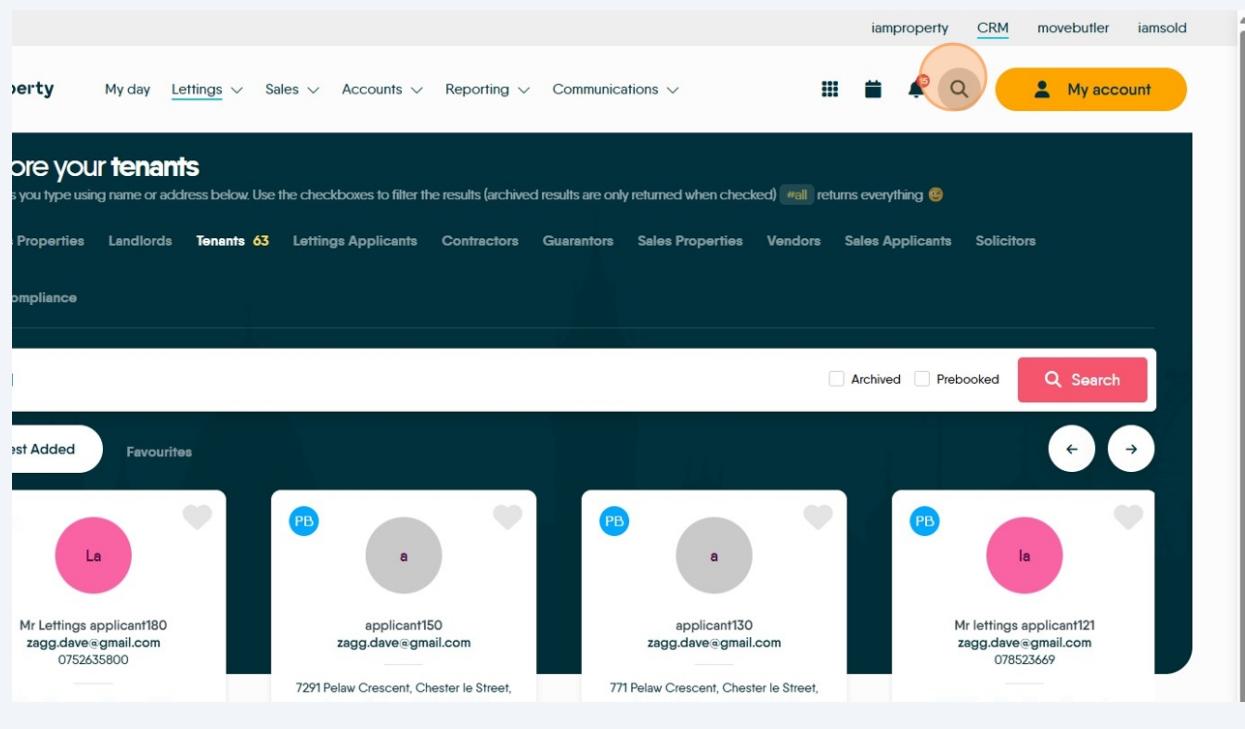
records

Name
Test test

## My tasks

	Status	Name	Priority	Start date	Due date
⋮	<input type="checkbox"/> Not Started	<u>Call Landlord</u>	↗ High	15/Nov/2024	15/Nov/2024
⋮	<input type="checkbox"/> Not Started	<u>test</u>	↗ High	27/Nov/2024	27/Nov/2024
⋮	<input type="checkbox"/> Not Started	<u>Call Landlord</u>	▬ Medium	12/Dec/2024	12/Dec/2024
⋮	<input type="checkbox"/> 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



My day Lettings Sales Accounts Reporting Communications

Properties Landlords **Tenants 63** Lettings Applicants Contractors Guarantors Sales Properties Vendors Sales Applicants Solicitors

Search

Archived Prebooked

First Added Favourites

La

Mr Lettings applicant180  
zagg.dave@gmail.com  
0752635800

PB a

applicant150  
zagg.dave@gmail.com

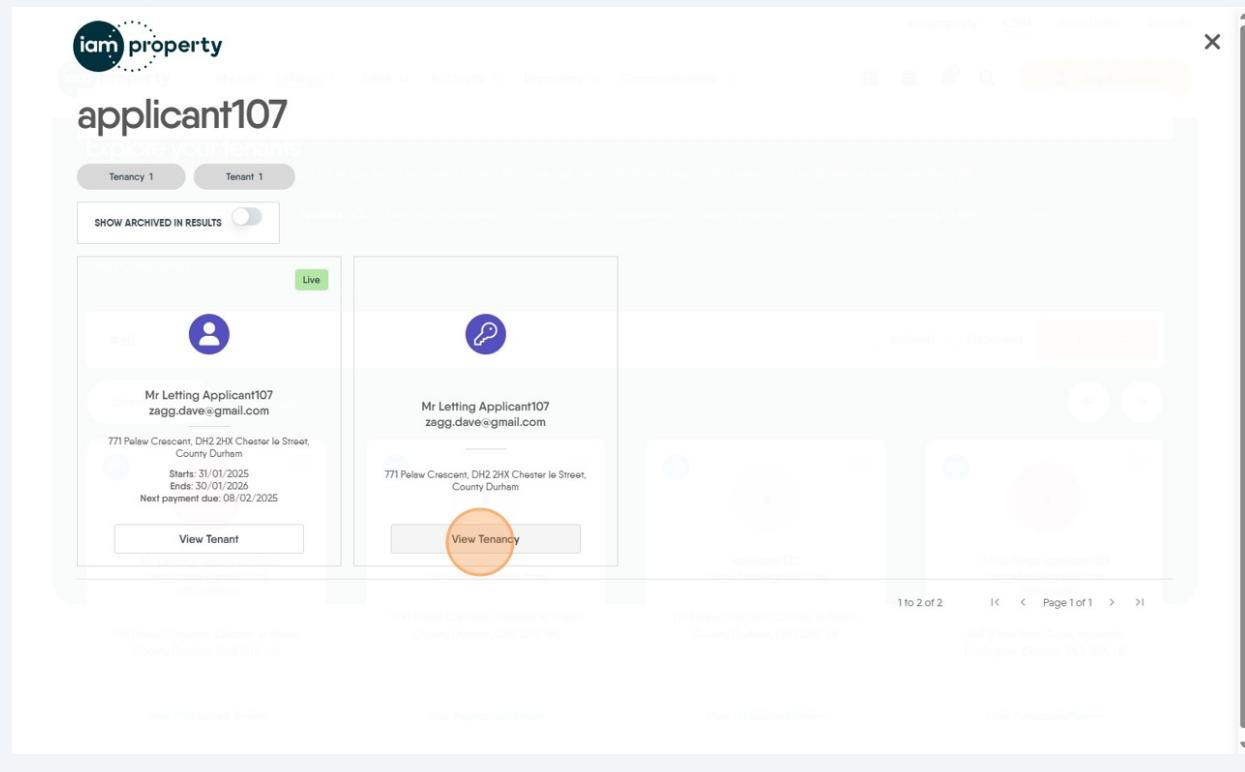
PB a

applicant130  
zagg.dave@gmail.com

PB la

Mr lettings applicant121  
zagg.dave@gmail.com  
078523669

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



Tenancy 1 Tenant 1

SHOW ARCHIVED IN RESULTS

Live

Mr Letting Applicant107  
zagg.dave@gmail.com

771 Pelaw Crescent, DH2 2HX Chester le Street, County Durham

Starts: 31/01/2025  
Ends: 30/01/2026  
Next payment due: 08/02/2025

View Tenant

Mr Letting Applicant107  
zagg.dave@gmail.com

771 Pelaw Crescent, DH2 2HX Chester le Street, County Durham

View Tenancy

1 to 2 of 2 |<|>|<|>| Page 1 of 1

## 5 You are now in the Tenancy Record.

Total Rent £ 1800.00  
Total Deposit £ 1700.00  
Status Live

822 Pelaw Crescent, Chester le Street

Tenancy Dates

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

Lease Period 12 Month Shorthold	Relocation Agent
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General Information

With Effect Break	Notice Date
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Agreement Name  
applicant105



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"

iamproperty CRM movebutler

My day Lettings Sales Accounts Reporting Communications

My acc

# Welcome back, Training

+ Add New Record View Property Management Visit Help Centre

Search all records

Time	Name	Status	Priority	Start date	Due date
12:00	Test test	Not Started	High	15/Nov/2024	15/Nov/24

Time	Name	Status	Priority	Start date	Due date
12:00	Test test	Not Started	High	27/Nov/2024	27/Nov/24
12:00	Call Landlord	Not Started	Medium	12/Dec/2024	12/Dec/24

7 Click "General"

iamproperty CRM movebutler

My day Lettings Sales Accounts Reporting Communications

My acc

Lettings dashboard General Property management

# Welcome back, Training

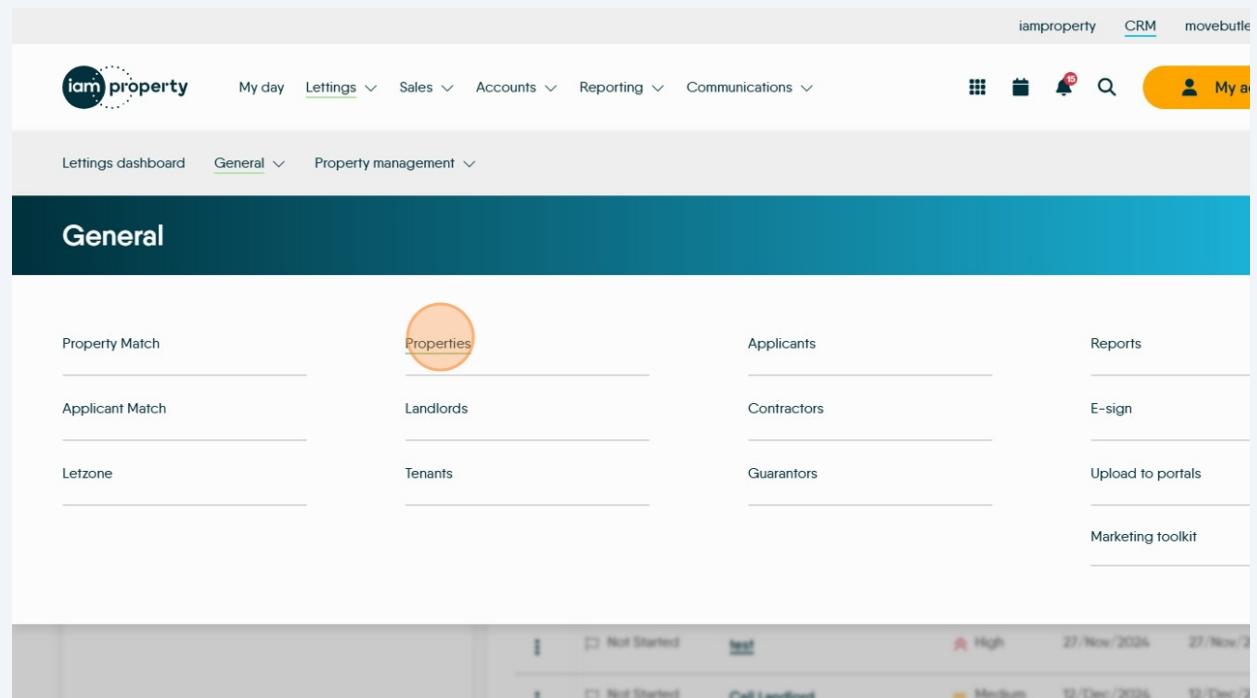
+ Add New Record View Property Management Visit Help Centre

Search all records

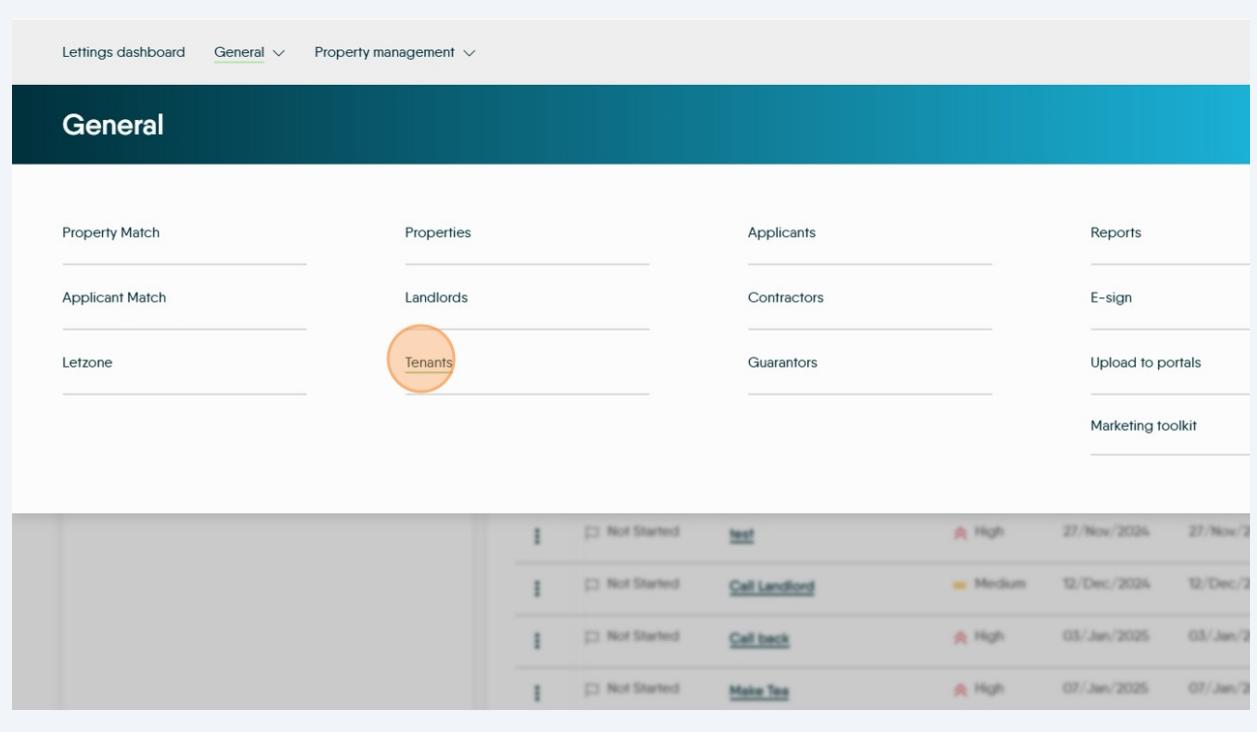
Time	Name	Status	Priority	Start date	Due date
12:00	Test test	Not Started	High	15/Nov/2024	15/Nov/24

Time	Name	Status	Priority	Start date	Due date
12:00	Test test	Not Started	High	27/Nov/2024	27/Nov/24
12:00	Call Landlord	Not Started	Medium	12/Dec/2024	12/Dec/24

8 Click "Properties" or click "Tenants"

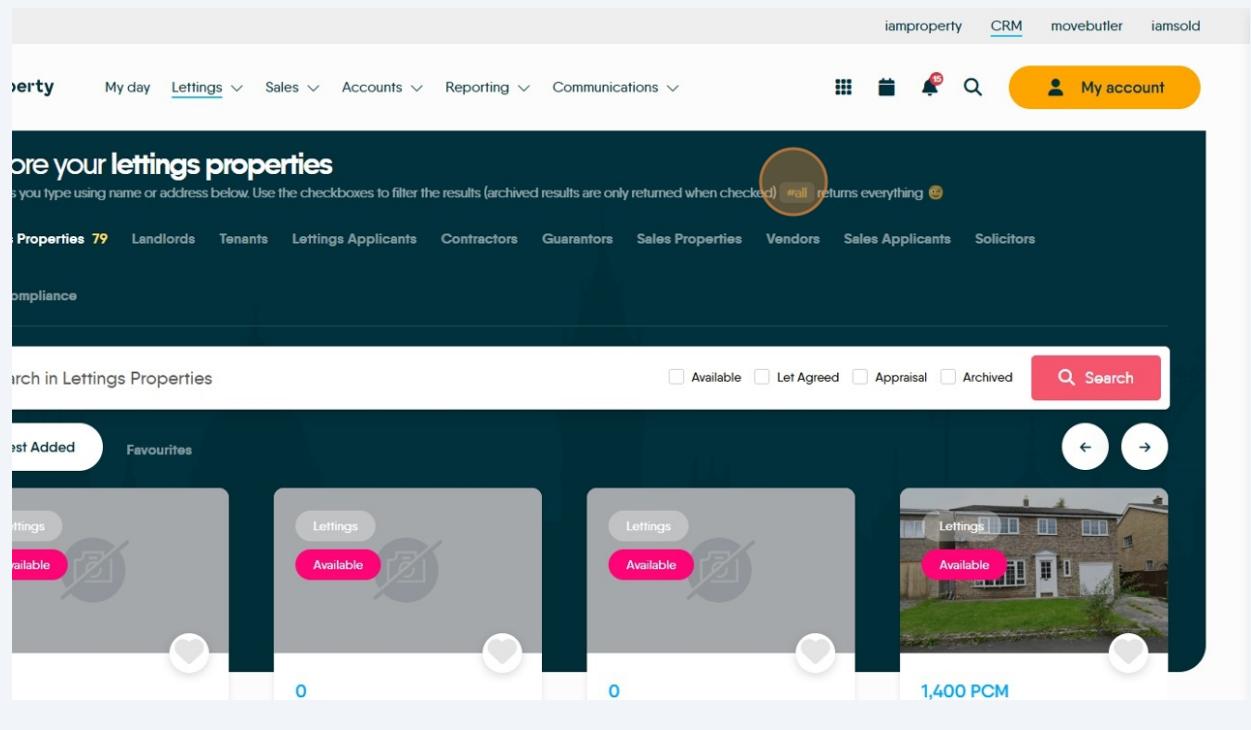


The screenshot shows the 'Properties' section of the iamproperty CRM. The top navigation bar includes links for 'My day', 'Lettings', 'Sales', 'Accounts', 'Reporting', 'Communications', 'CRM', 'movebutton', and a 'My account' button. Below the navigation is a secondary navigation bar with 'Lettings dashboard', 'General', and 'Property management'. A large blue header bar displays the word 'General'. The main content area is organized into four columns: 'Property Match', 'Properties' (which is highlighted with an orange circle), 'Applicants', and 'Reports'. Each column contains a sub-section: 'Applicant Match', 'Landlords', 'Contractors', and 'E-sign' under 'Reports'; 'Letzone', 'Tenants', 'Guarantors', and 'Upload to portals' under 'Reports'; and 'Marketing toolkit' under 'Reports'. Below this is a table with columns for 'Status', 'Task', 'Priority', 'Due Date', and 'Last Update'. The table shows four rows: 'Not Started' for 'Test', 'Not Started' for 'Call Landlord' (Priority Medium), 'Not Started' for 'Call back' (Priority High), and 'Not Started' for 'Make Tea' (Priority High). The bottom navigation bar is identical to the one at the top.



The screenshot shows the 'Tenants' section of the iamproperty CRM. The layout is identical to the 'Properties' section, with the 'Tenants' section highlighted by an orange circle. The main content area is organized into four columns: 'Property Match', 'Properties' (highlighted with an orange circle), 'Applicants', and 'Reports'. Each column contains a sub-section: 'Applicant Match', 'Landlords', 'Contractors', and 'E-sign' under 'Reports'; 'Letzone', 'Tenants', 'Guarantors', and 'Upload to portals' under 'Reports'; and 'Marketing toolkit' under 'Reports'. Below this is a table with columns for 'Status', 'Task', 'Priority', 'Due Date', and 'Last Update'. The table shows four rows: 'Not Started' for 'Test', 'Not Started' for 'Call Landlord' (Priority Medium), 'Not Started' for 'Call back' (Priority High), and 'Not Started' for 'Make Tea' (Priority High). The bottom navigation bar is identical to the one at the top.

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



Explore your lettings properties

Search as you type using name or address below. Use the checkboxes to filter the results (archived results are only returned when checked) **#all** returns everything 😊

Properties 79 Landlords Tenants Lettings Applicants Contractors Guarantors Sales Properties Vendors Sales Applicants Solicitors

Search in Lettings Properties

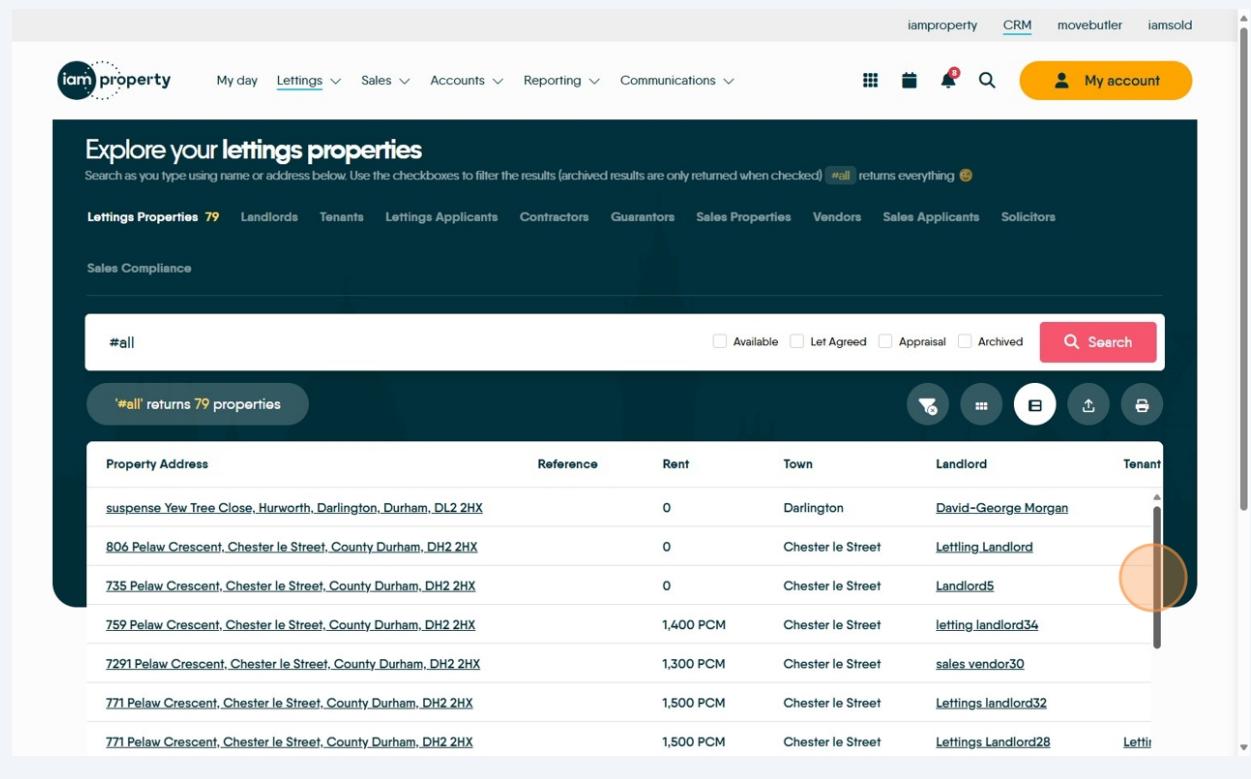
Available Let Agreed Appraisal Archived

Search

Recent Added Favourites

Lettings Available 0 Lettings Available 0 Lettings Available 0 Lettings Available 1,400 PCM

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



Explore your lettings properties

Search as you type using name or address below. Use the checkboxes to filter the results (archived results are only returned when checked) **#all** returns everything 😊

Lettings Properties 79 Landlords Tenants Lettings Applicants Contractors Guarantors Sales Properties Vendors Sales Applicants Solicitors

#all

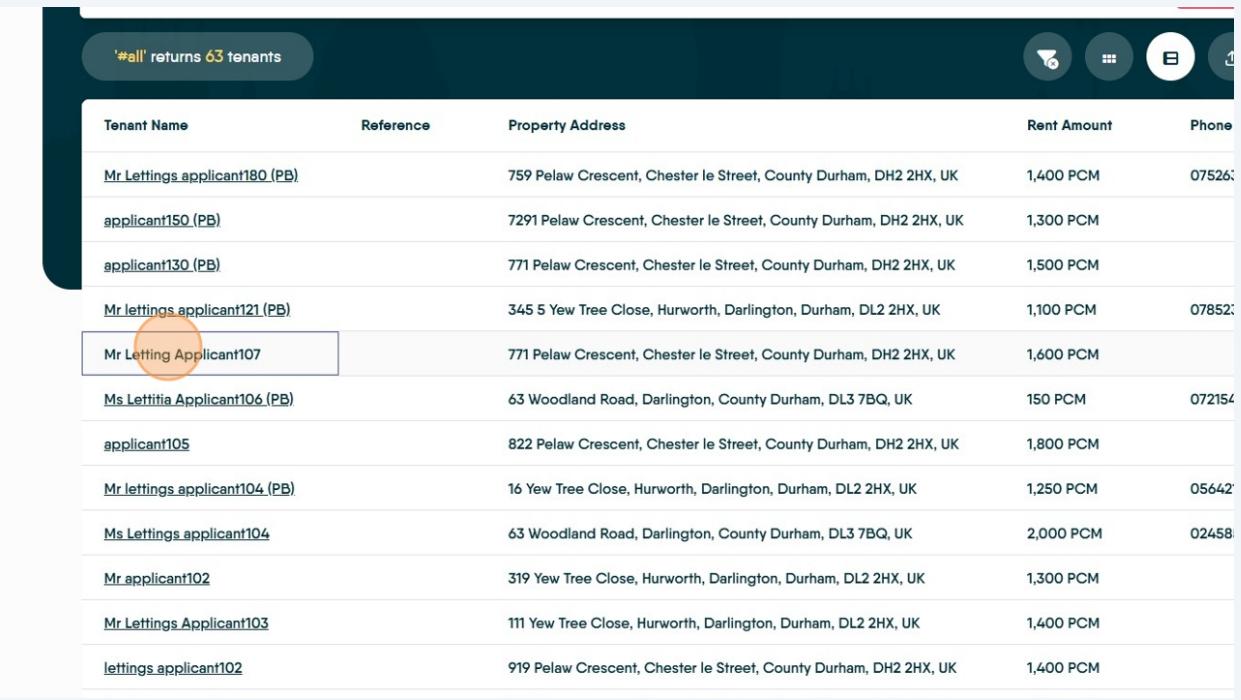
#all returns 79 properties

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	Letting	



Tip! The quickest way is from the Tenant record.

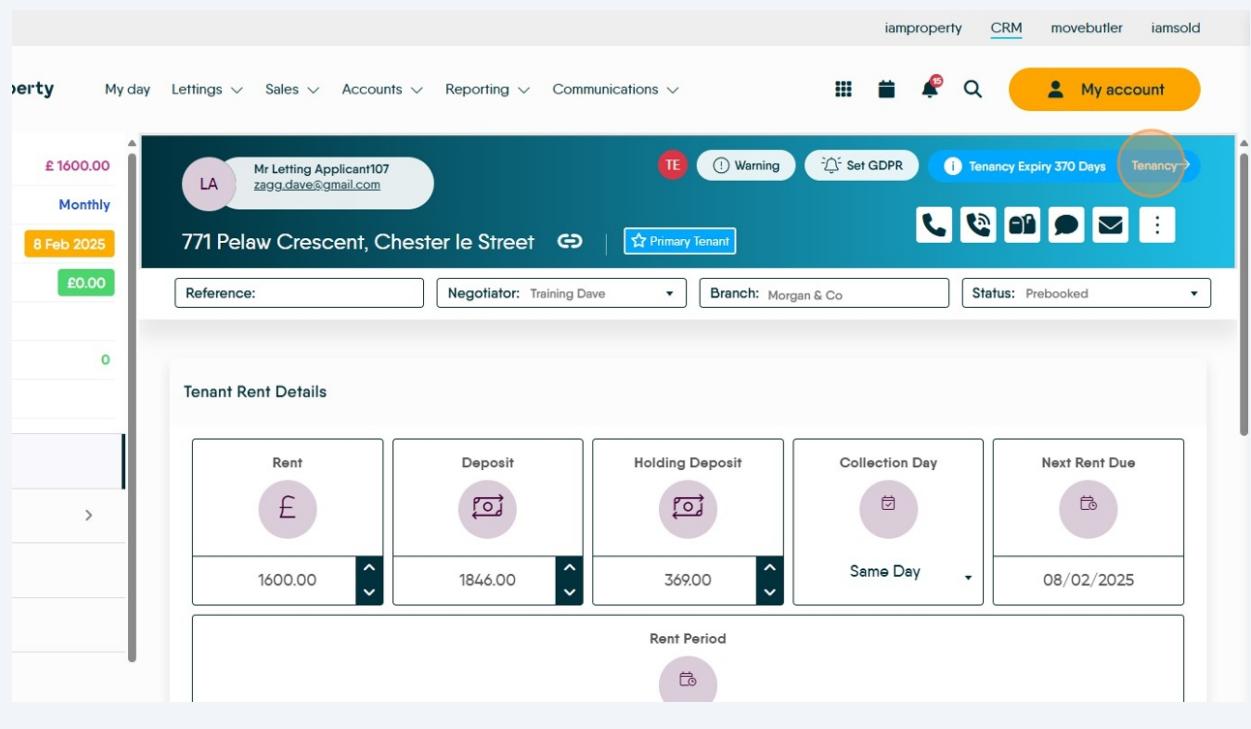
**11** In the Explore my Tenants screen, select the tenant you want.



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	07526:
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	07852:
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"



£ 1600.00  
Monthly  
8 Feb 2025  
£0.00

Mr Letting Applicant107  
zagg.dave@gmail.com

771 Pelaw Crescent, Chester le Street | Primary Tenant

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

TENancy Expiry 370 Days

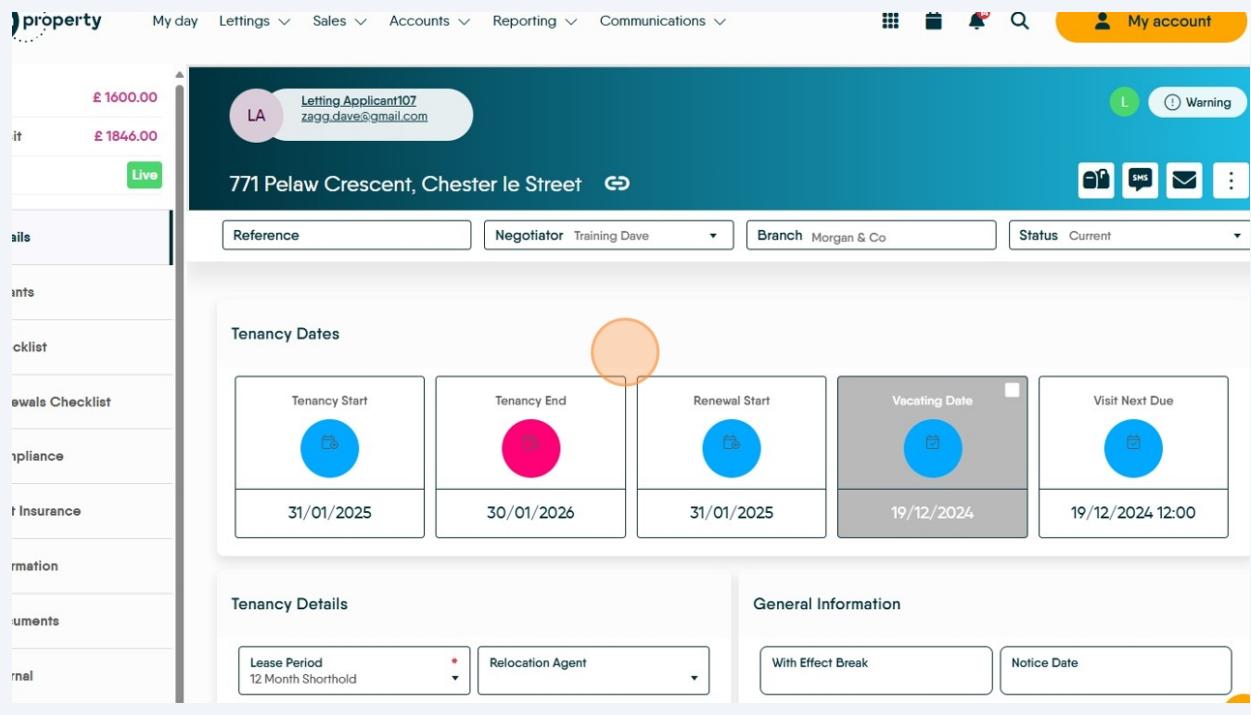
Tenant Rent Details

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

Rent Period

13

You are now at the Tenancy record.



£ 1600.00  
it £ 1846.00  
Live

Letting Applicant107  
zagg.dave@gmail.com

771 Pelaw Crescent, Chester le Street

Reference Negotiator Training Dave Branch Morgan & Co Status Current

Tenancy Dates

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

Lease Period: 12 Month Shorthold

Relocation Agent

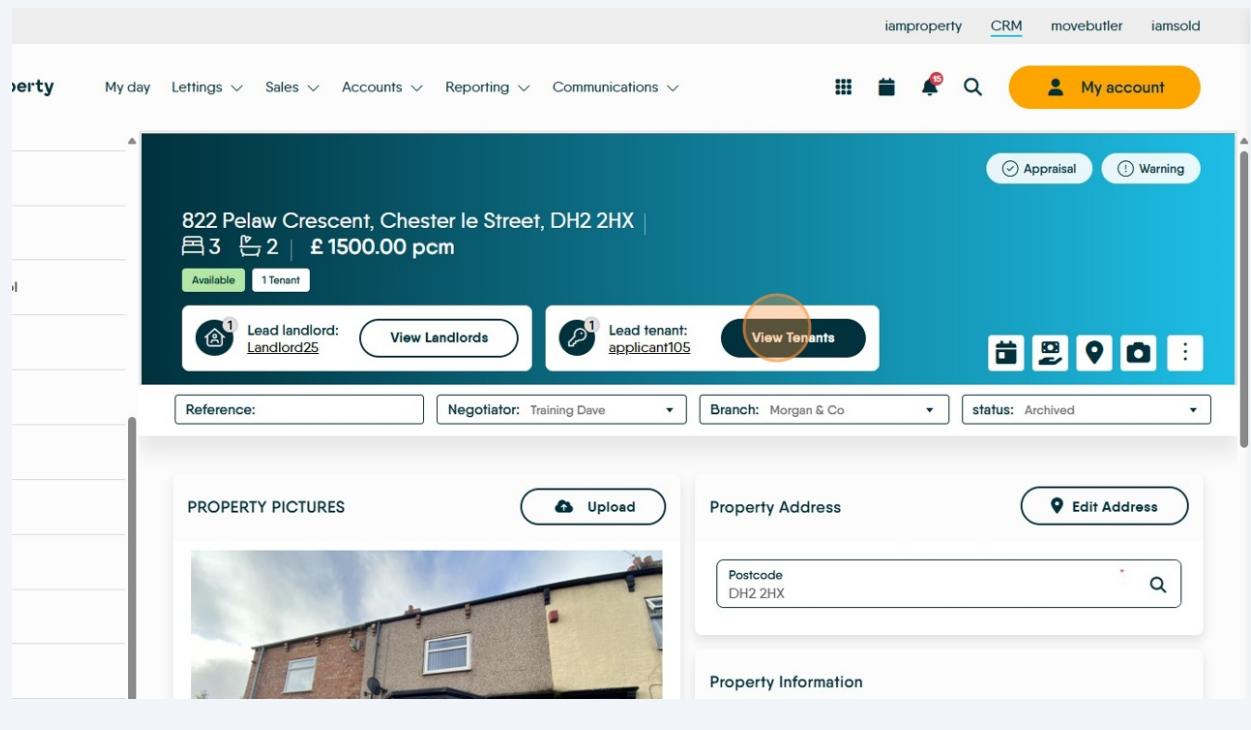
General Information

With Effect Break

Notice Date

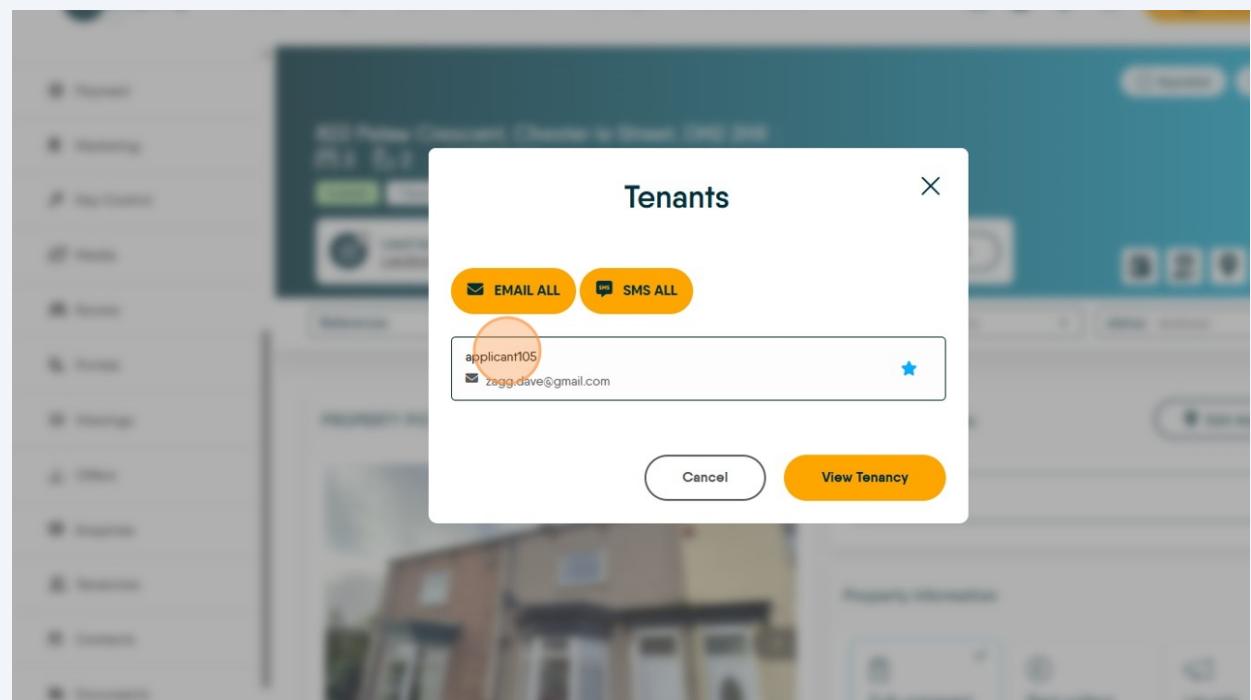
## Viewing Tenancy details from a Property Record

14 Click "View tenants"



The screenshot shows a software interface for property management. At the top, there are navigation links: 'My day', 'Lettings', 'Sales', 'Accounts', 'Reporting', and 'Communications'. On the right, there are icons for 'Appraisal', 'Warning', 'My account', and a search bar. The main content area displays a property listing for '822 Pelaw Crescent, Chester le Street, DH2 2HX'. The listing includes '3' bedrooms, '2' bathrooms, and a price of '£ 1500.00 pcm'. Below the listing, there are buttons for 'Available' and '1 Tenant'. A 'Lead landlord' section shows 'Landlord25'. A 'Lead tenant' section shows 'applicant105', with a 'View Tenants' button highlighted by a yellow circle. Below these, there are fields for 'Reference', 'Negotiator', 'Branch', and 'status'. The 'PROPERTY PICTURES' section shows a thumbnail image of a building. The 'Property Address' section shows the address '822 Pelaw Crescent, Chester le Street, DH2 2HX' and a 'Postcode' field with 'DH2 2HX'. The 'Property Information' section is partially visible.

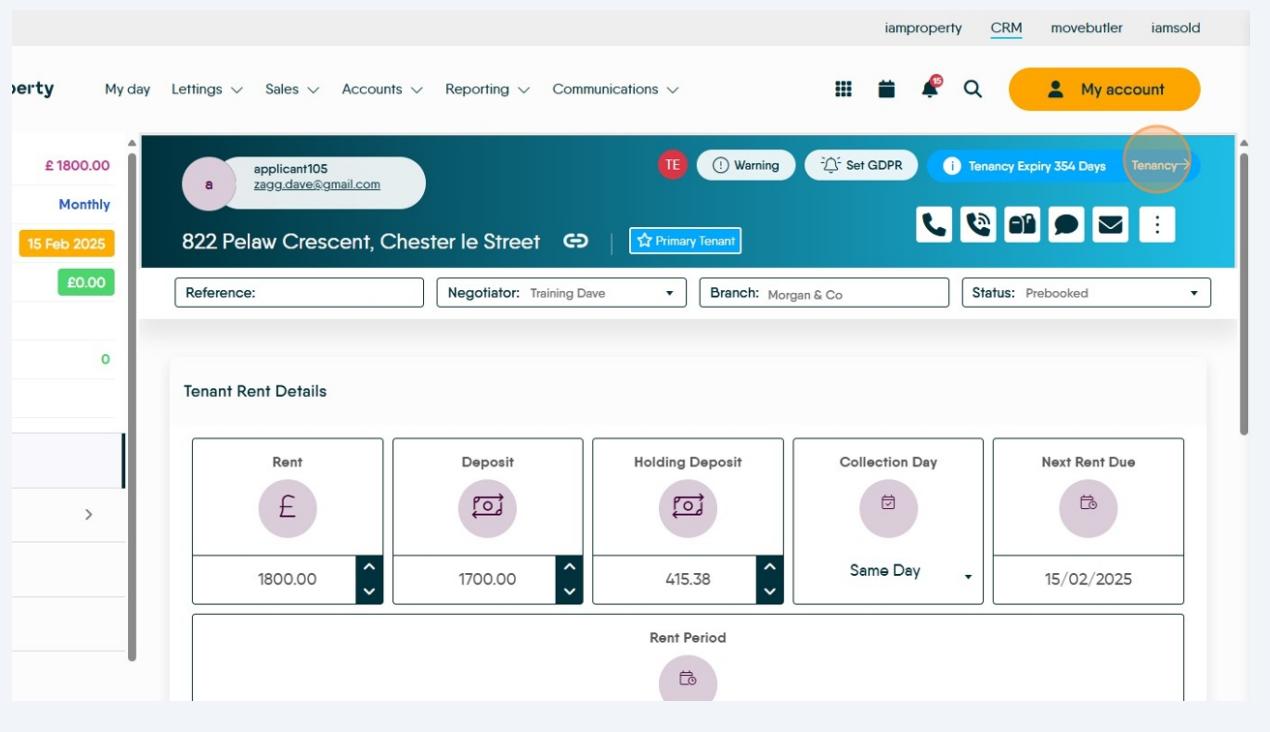
15 To go to the Tenant record, click on the Tenant name



The screenshot shows a 'Tenants' modal window. The window title is 'Tenants'. It contains two buttons: 'EMAIL ALL' and 'SMS ALL'. Below these buttons is a list box containing the tenant name 'applicant105' and the email address 'zagg.dave@gmail.com'. A yellow circle highlights the tenant name 'applicant105'. At the bottom of the window are 'Cancel' and 'View Tenancy' buttons.

16

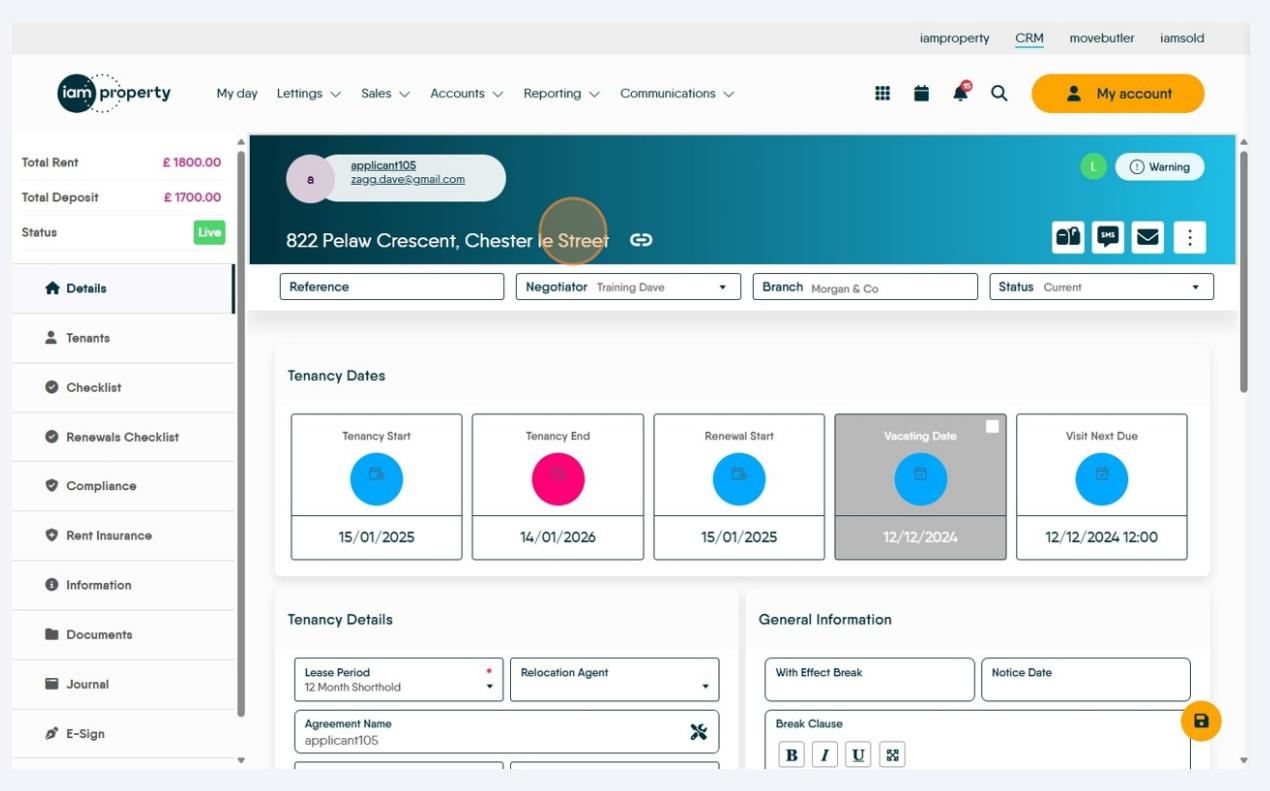
This will take you to the tenant record, from there click "Tenancy" to move to the tenancy record.



The screenshot shows the iamproperty software interface. At the top, there are navigation links: My day, Lettings, Sales, Accounts, Reporting, Communications, and a 'Tenancy' button which is highlighted with a yellow circle. Below the navigation, there's a header with the applicant's name 'applicant105' and email 'zagg.dave@gmail.com'. The address '822 Pelaw Crescent, Chester le Street' is displayed, along with a 'Primary Tenant' badge. Below the address, there are fields for Reference, Negotiator (Training Dave), Branch (Morgan & Co), and Status (Prebooked). The main content area is titled 'Tenant Rent Details' and shows five boxes for Rent, Deposit, Holding Deposit, Collection Day, and Next Rent Due. The Rent box shows £1800.00. The Next Rent Due box shows 15/02/2025. Below this is a 'Rent Period' section with a date range from 15/01/2025 to 14/01/2026.

17

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



The screenshot shows the iamproperty software interface in the Tenancy Record view. The left sidebar has a 'Details' tab selected, showing 'Total Rent' (£1800.00), 'Total Deposit' (£1700.00), and 'Status' (Live). The main content area shows the address '822 Pelaw Crescent, Chester le Street' highlighted with a yellow circle. Below the address, there are sections for 'Tenancy Dates' and 'Tenancy Details'. The 'Tenancy Dates' section shows '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) and 'Relocation Agent'. The 'General Information' section includes 'With Effect Break' and 'Notice Date'. At the bottom, there's an 'E-Sign' section with a signature field and a yellow circle highlighting the 'E-Sign' button.

18 Click "Properties"

Properties

Identity Confirmed

Address Confirmed

Last Contacted

Details

Checklist

Properties (highlighted)

Tenancies

Contacts

Documents

Journal

E-Sign

Audit

LL

Lettings Landlord28  
zagg.dave@gmail.com

PROSPECT

Warning

Reference:

Negotiator: Training Dave

Branch: Morgan & Co

Status: Active

Personal Information

Title: Mr

Forename: Lettings

Surname: Landlord28

Company Name

Website

Phone Number

Work phone

Mobile phone

Email Address: zagg.dave@gmail.com

Salutation: Mr Landlord28

Agreement Name: Mr Lettings Landlord28

Source

Financial Information

Overseas

Tax Enabled

Exclude From Payments

Registration No

CNR No

CNR Approval Date: 19/12/2024

Tax Rate: 0.00

VAT Registration No

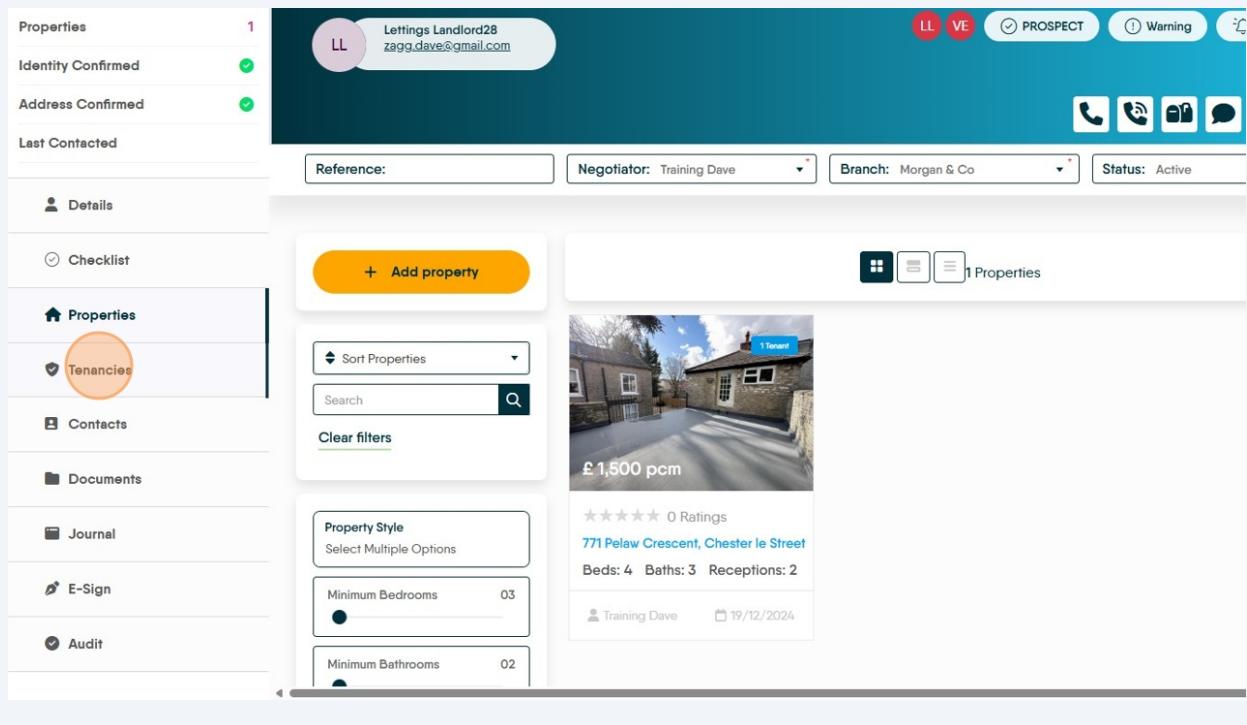
HMRC Due Date: 19/12/2024

Statement: No Statement

Send Statement Via Email

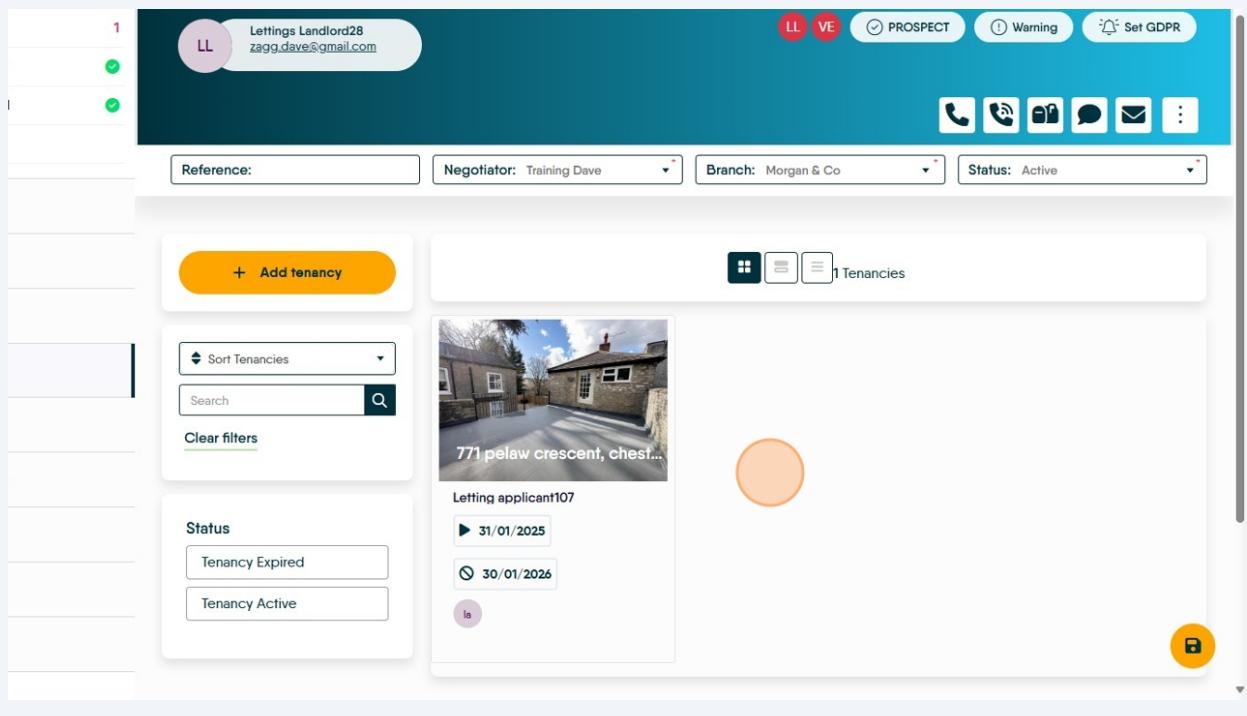
From Property Record, Tenancies tab.

## 19 Click "Tenancies"



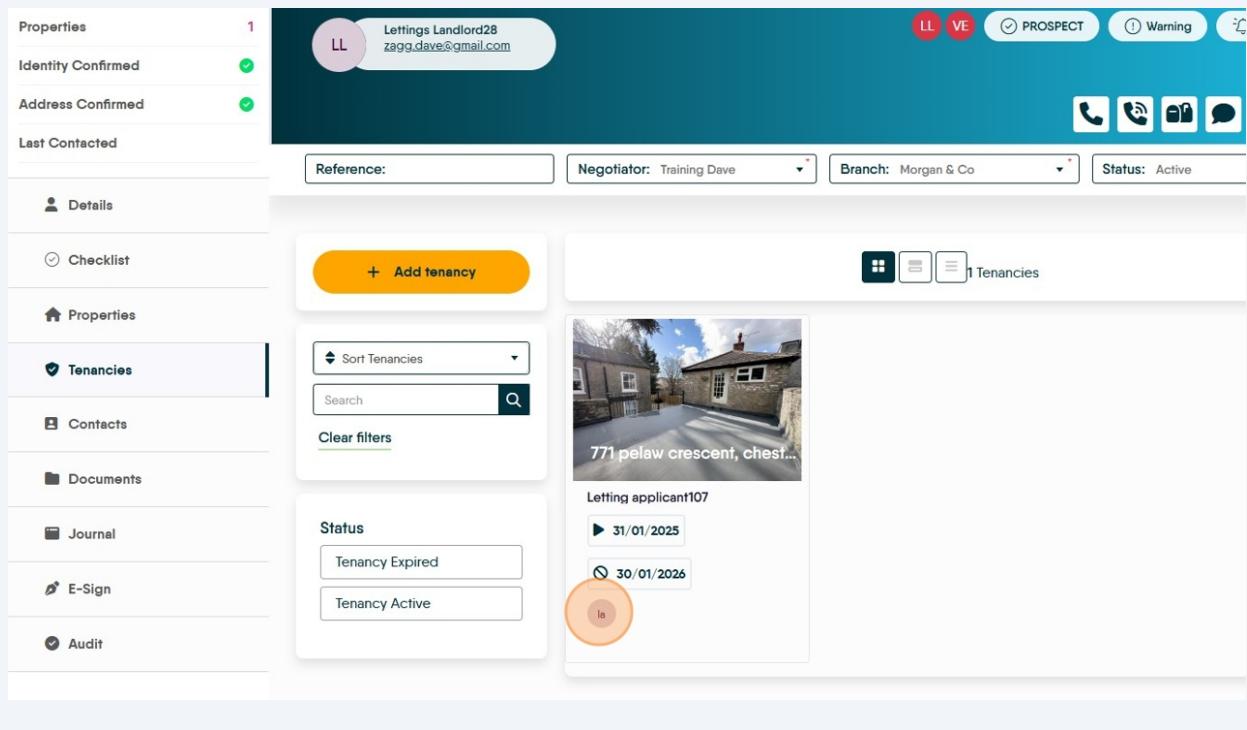
The screenshot shows the software interface with the 'Tenancies' section highlighted. The top navigation bar includes 'Properties' (1), 'Identity Confirmed' (green checkmark), 'Address Confirmed' (green checkmark), 'Last Contacted', and user information 'Lettings Landlord28 zagg.dave@gmail.com'. The top right features status indicators: LL (red), VE (red), PROSPECT (green), Warning (yellow), and Set GDPR (yellow). Below the top bar are buttons for 'Reference', 'Negotiator', 'Branch', and 'Status'. The left sidebar has links for 'Properties' (selected), 'Tenancies' (highlighted with an orange circle), 'Contacts', 'Documents', 'Journal', 'E-Sign', and 'Audit'. The main content area shows a 'Tenancy' card for '771 Pelaw Crescent, Chester le Street' with a photo of a house, price '£ 1,500 pcm', 0 ratings, 4 beds, 3 baths, and 2 receptions. It also shows the negotiator 'Training Dave' and the date '19/12/2024'.

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



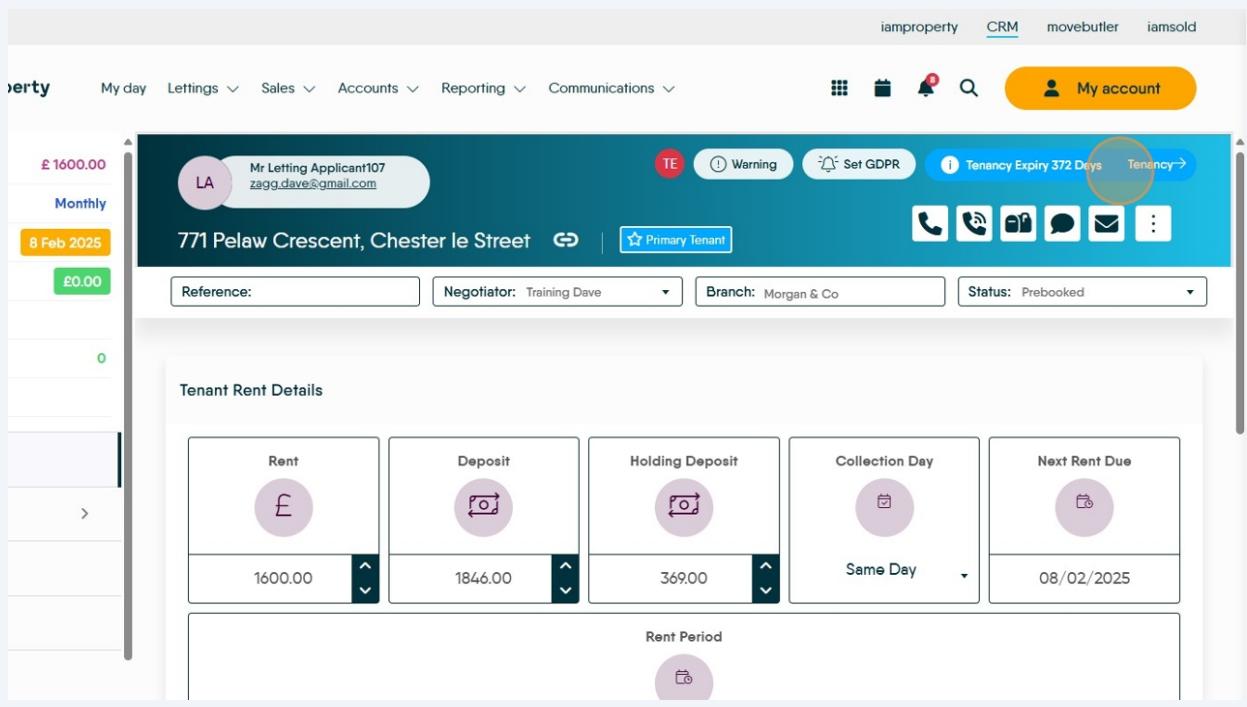
The screenshot shows the software interface with the 'Tenancies' section. The top navigation bar and sidebar are identical to the previous screenshot. The main content area shows a 'Tenancy' card for '771 pelaw crescent, chest...' with a photo of a house, 'Letting applicant107', and dates '31/01/2025' and '30/01/2026'. A status filter on the left is set to 'Tenancy Expired'. A large orange circle highlights the 'Tenancy Expired' button. The bottom right corner of the interface has a yellow circular icon with a lock symbol.

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



The screenshot shows the iamsold software interface. At the top, there is a header with various status indicators: 'Properties' (1), 'Identity Confirmed' (green), 'Address Confirmed' (green), 'Last Contacted', 'Lettings Landlord28 zagg.dave@gmail.com', 'PROSPECT' (red), 'Warning' (yellow), and 'CRM' (blue). Below the header, there are several input fields: 'Reference:' (empty), 'Negotiator: Training Dave', 'Branch: Morgan & Co', and 'Status: Active'. On the left, a sidebar lists 'Details', 'Checklist', 'Properties', 'Tenancies' (which is selected and highlighted in blue), 'Contacts', 'Documents', 'Journal', 'E-Sign', and 'Audit'. In the center, there is a 'Tenancies' section with a sub-section for '771 pelaw crescent, chester le street'. This section includes a photo of the property, the address, the letting applicant (Letting applicant107), and two dates: '31/01/2025' and '30/01/2026'. A small 'LA' icon is located in the top left corner of this section, which is highlighted with a red circle.

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



The screenshot shows the iamsold software interface. At the top, there is a header with various status indicators: 'My day' (grey), 'Lettings' (dropdown), 'Sales' (dropdown), 'Accounts' (dropdown), 'Reporting' (dropdown), 'Communications' (dropdown), 'iamproperty' (grey), 'CRM' (blue), 'movebutler' (grey), and 'iamsold' (grey). Below the header, there are several input fields: 'Reference:' (empty), 'Negotiator: Training Dave', 'Branch: Morgan & Co', and 'Status: Prebooked'. On the left, there is a sidebar with a 'Tenancy' icon highlighted with a blue circle. The main content area shows '771 Pelaw Crescent, Chester le Street' and 'Primary Tenant'. Below this, there is a 'Tenant Rent Details' section with five boxes: 'Rent' (1600.00), 'Deposit' (1846.00), 'Holding Deposit' (369.00), 'Collection Day' (Same Day), and 'Next Rent Due' (08/02/2025). A 'Tenancy' icon is located in the top right corner of the main content area, highlighted with a blue circle.