

# Using Vision+ to Reference an Applicant



This guide provides a step-by-step process for efficiently referencing an applicant using the Vision+ platform, ensuring that all necessary checks and documentation are completed correctly. It simplifies the referencing procedure by outlining each action needed, making it accessible even for those who may not be familiar with the system. By following this guide, users can ensure a smooth application process, reducing potential errors and streamlining communication with applicants and guarantors.



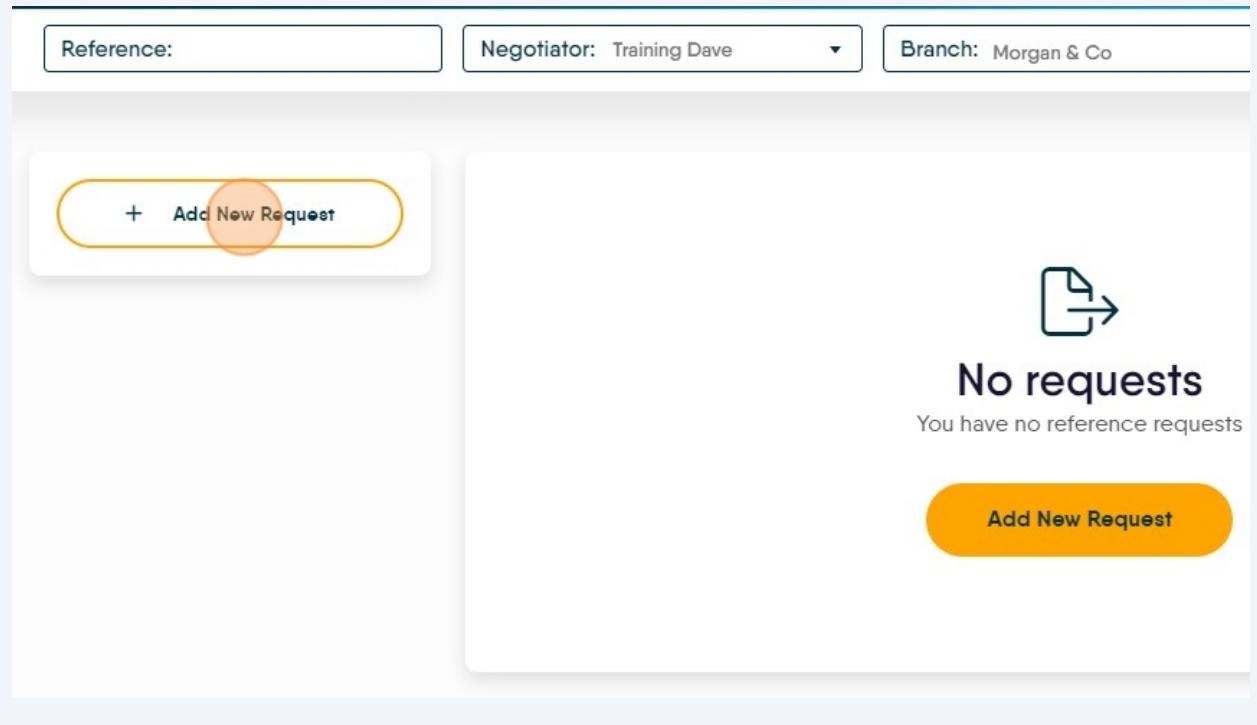
Alert! In this guide we are using a demo setup. You will have a different set of product options in 'Select product type' and 'Select reference type'

- 1 Navigate to <https://crm.iamproperty.com/> then navigate to the Tenant you are referencing. Vision+ is also accessible via Letzone

- 2 Lettings Tenant Record. In the left menu, Click "Referencing Checks (by Vision+)"

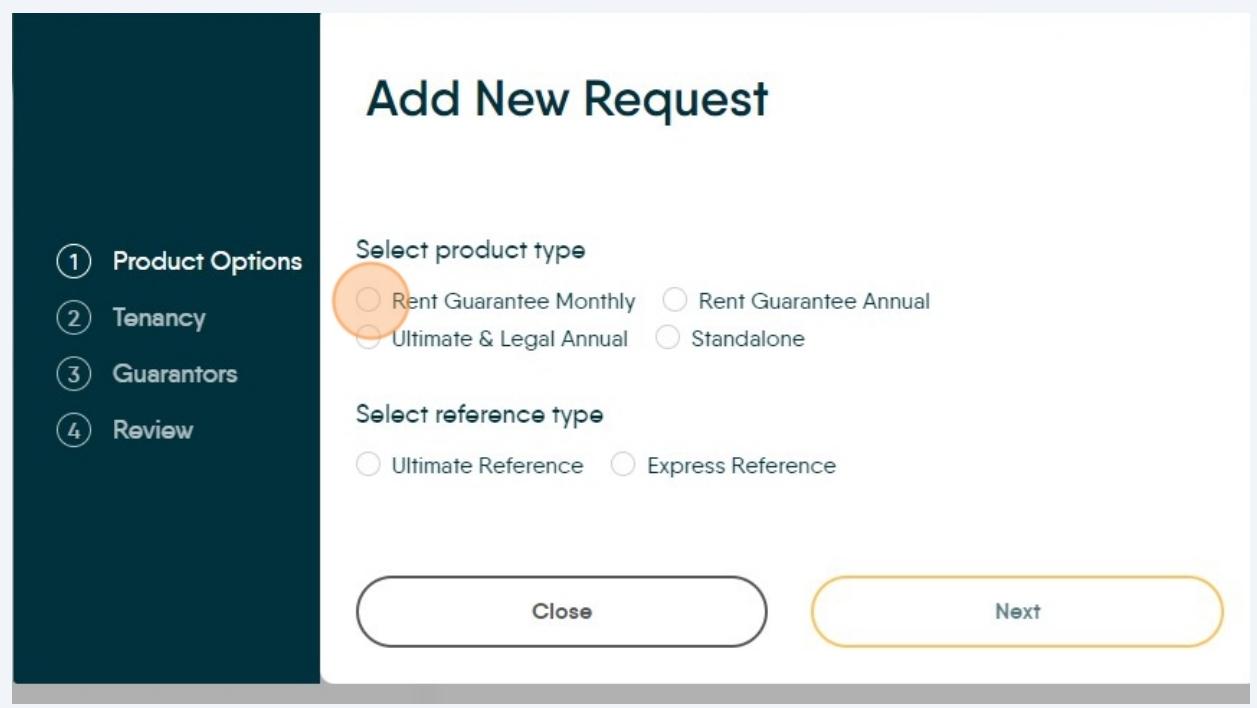
The screenshot shows the Vision+ platform interface for a tenant record. The top navigation bar includes the address '399 Kingsway, Darlington', a 'Primary Tenant' indicator, and search/filter fields for 'Reference', 'Negotiator: Training Dave', and 'Branch'. The left sidebar menu lists 'Details', 'Accounts', 'Checklist', 'Financial', 'Contacts', 'Documents', 'Letzone', and 'Referencing Checks (by Vision+)'. The 'Referencing Checks (by Vision+)' option is highlighted with an orange circle. The main content area is titled 'Tenant Rent Details' and shows three boxes: 'Rent' (1000.00), 'Deposit' (1153.84), and 'Holding Deposit' (230.76). Below these boxes is a 'Rent Period' section with a calendar icon.

3 Click "Add New Request"



4 Click the product type you want to use.

N.B. On screen options will vary depending on your company choices.

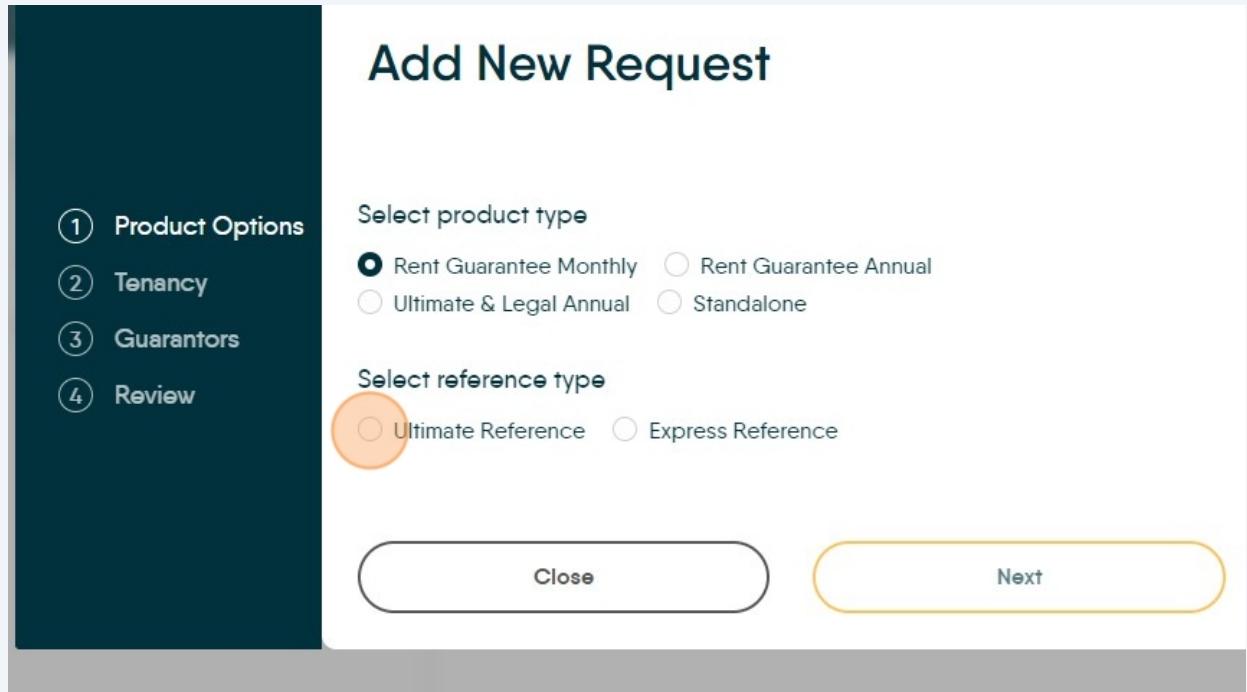




Alert! Some product types and reference types are not compatible, for example 'Express Reference' cannot be used with an 'Ultimate...' product type. For more information speak with Vision+.

- 5 Click the Reference type you want to use.

N.B. On screen options will vary depending on your company choices.



6 Click "Next" to move on or click '+Add Another Tenant/Applicant' this is pulled in from the record that you are accessing the Vision+ service from.

Property

399 Kingsway, Darlington

Tenants

Miss Davidna Morgan

+ Add Another Tenant / Applicant

Prev

Next

7 If you need to add an additional tenant Click "Add Another Tenant / Applicant"

399 Kingsway, Darlington

Tenants

Miss Davidna Morgan

+ Add Another Tenant / Applicant

Select existing tenant

+ Add new applicant

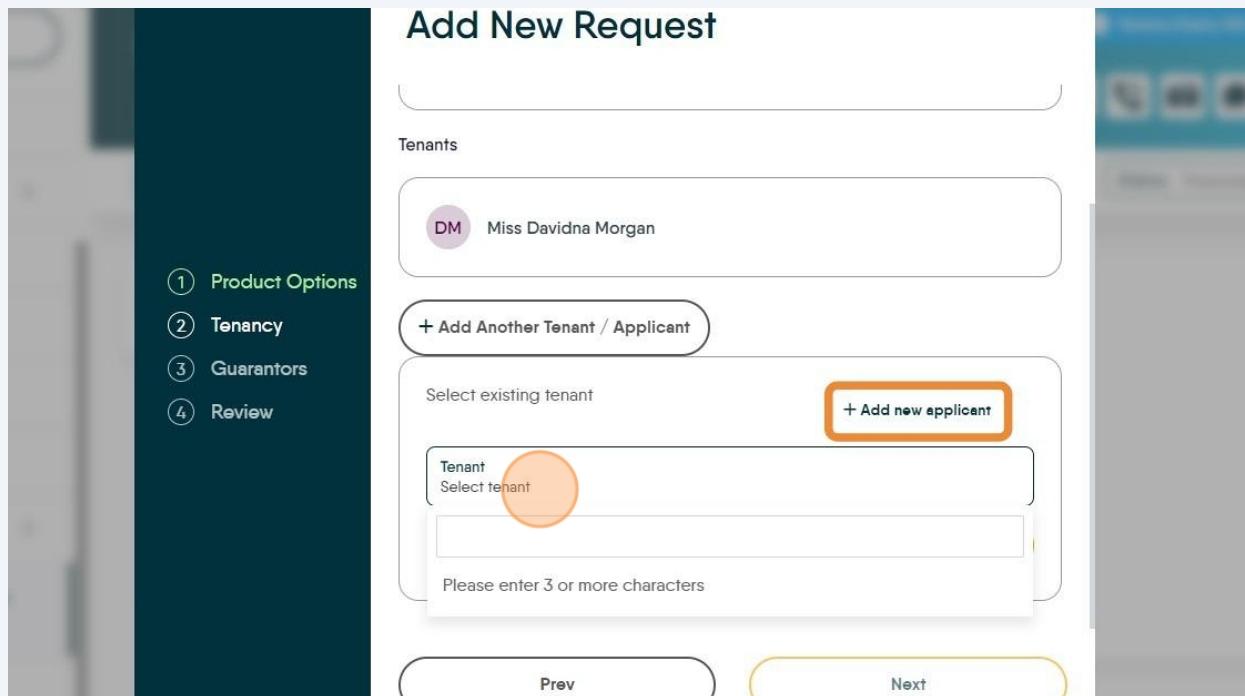
Tenant

Prev

Next

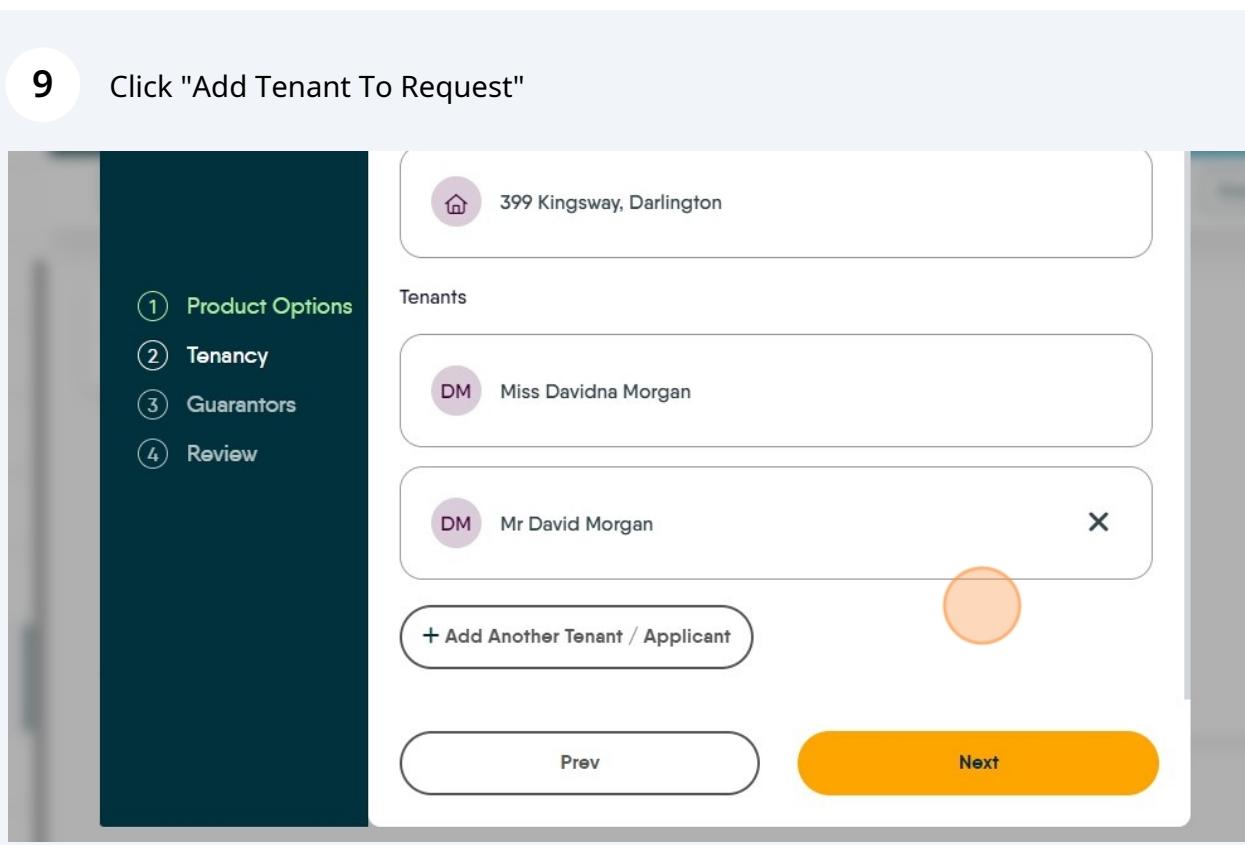
8

Either Click "Select tenant" and search for an existing record or select '+Add New Applicant'



9

Click "Add Tenant To Request"



10 Either keep adding new entries or, click "Next".

399 Kingsway, Darlington

Tenants

DM Miss Davidna Morgan

DM Mr David Morgan X

+ Add Another Tenant / Applicant

Prev Next

11 This screen will ask if any person needs a guarantor, if so Click "Yes"

## Add New Request

Miss Davidna Morgan

Does Davidna require a guarantor?

Yes  No

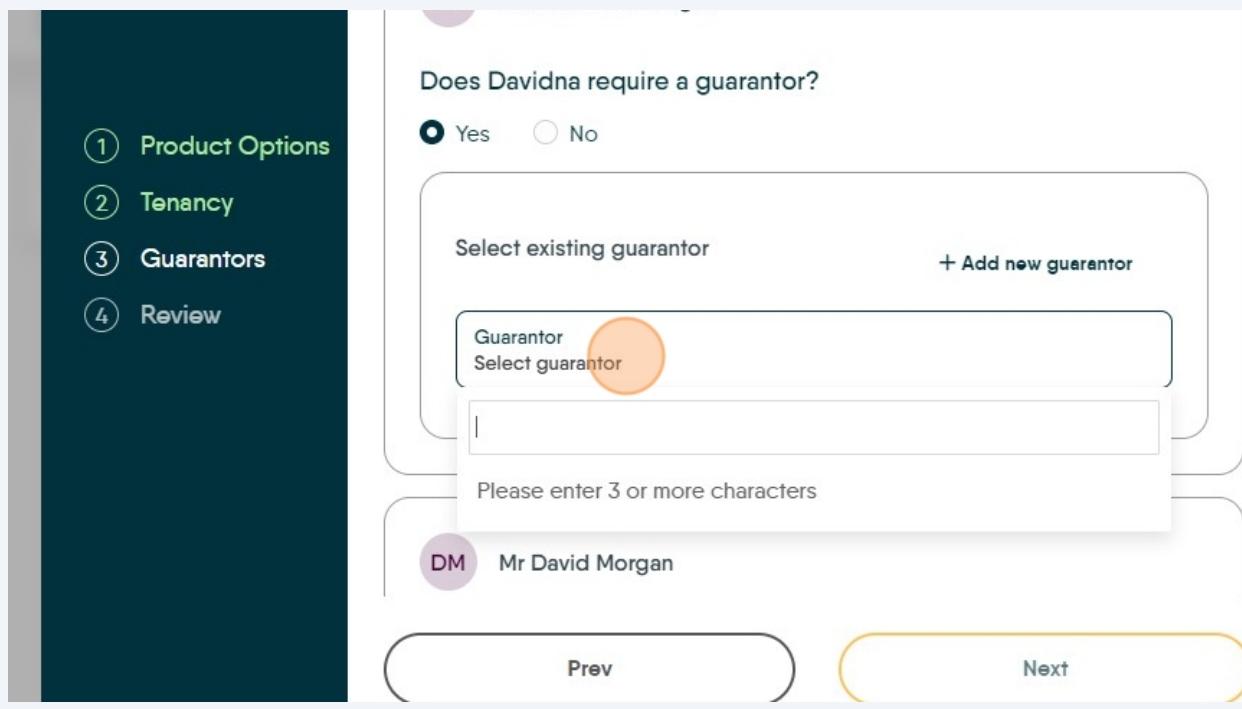
Mr David Morgan

Does David require a guarantor?

Yes  No

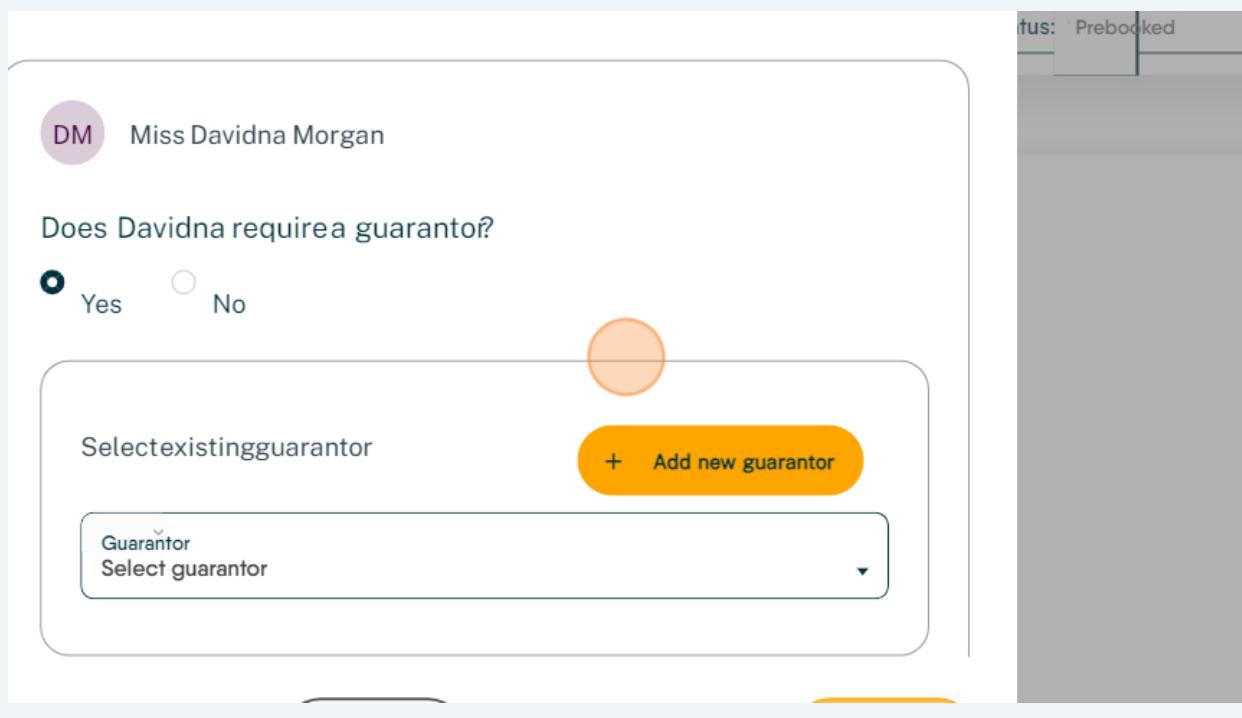
12

Then either search for (if you have already added the Guarantor details) or add the new Guarantor, Click "Select guarantor"



13

Click "Add new guarantor" If adding a new Guarantor, follow the following screens. To keep the process flowing, we recommend completing as much information in the Guarantor records as you can.



Rent Amount £ 1000.00

Rent Period Monthly

Rent Due 6 Jan 2025

Overdue Balance £0.00

Overdue Date

Days Overdue 0

Last Contacted

Go to Payment

+ New Contact

Sort Contacts

Search

Clear filters



David morgan  
david.morgan@iamprop...  
01865860873

GDPR

Details

Search Existing Contacts

Contact Type

Title  
Select Title

Forename

Surname \*

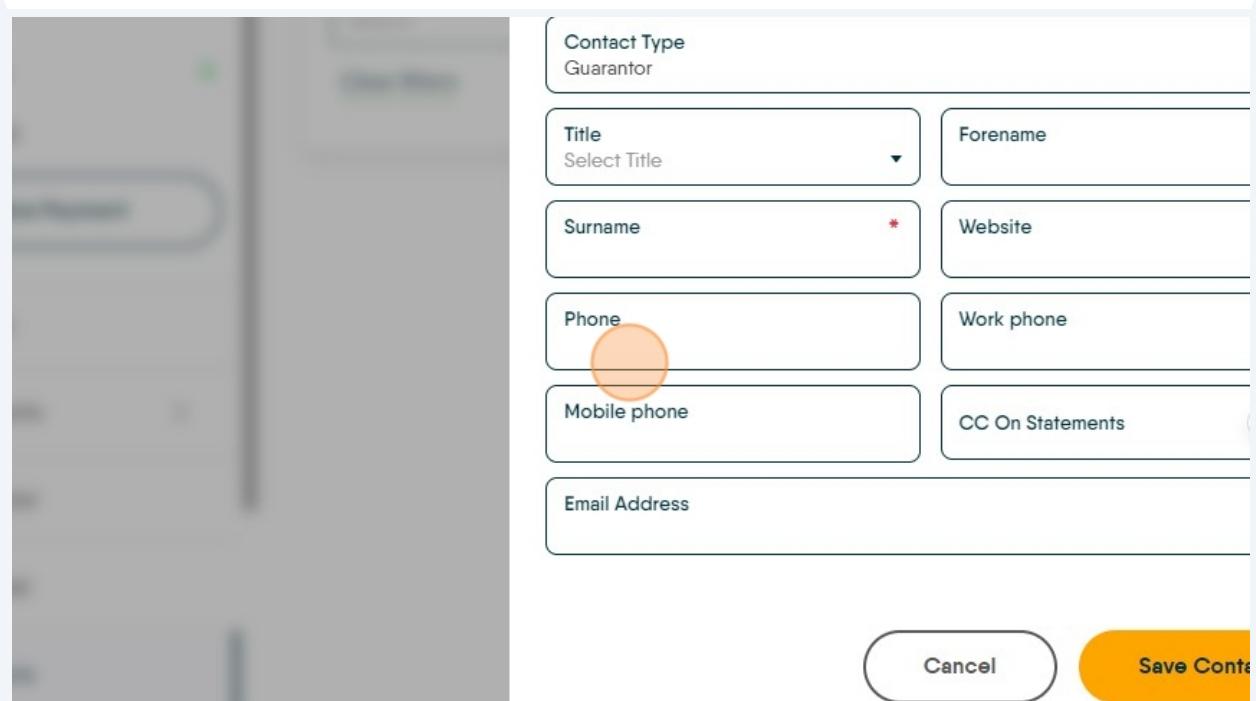
Website

Phone

Work phone

Mobile phone

Office phone



Contact Type  
Guarantor

Title  
Select Title

Forename

Surname \*

Website

Phone

Work phone

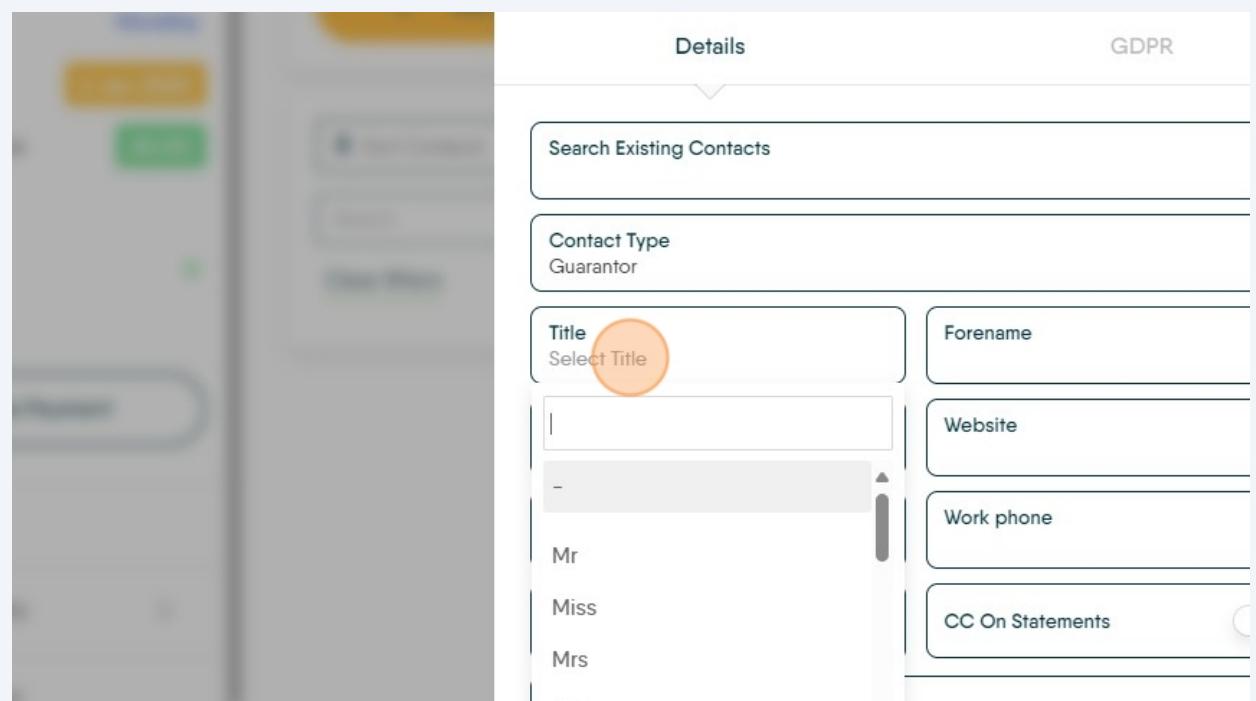
Mobile phone

CC On Statements

Email Address

Cancel

Save Contact



Details

GDPR

Search Existing Contacts

Contact Type  
Guarantor

Title  
Select Title

Forename

Website

Work phone

CC On Statements

Details      GDPR

Search Existing Contacts

Contact Type  
Guarantor

Title  
Mr

Forename

Surname \*

Website

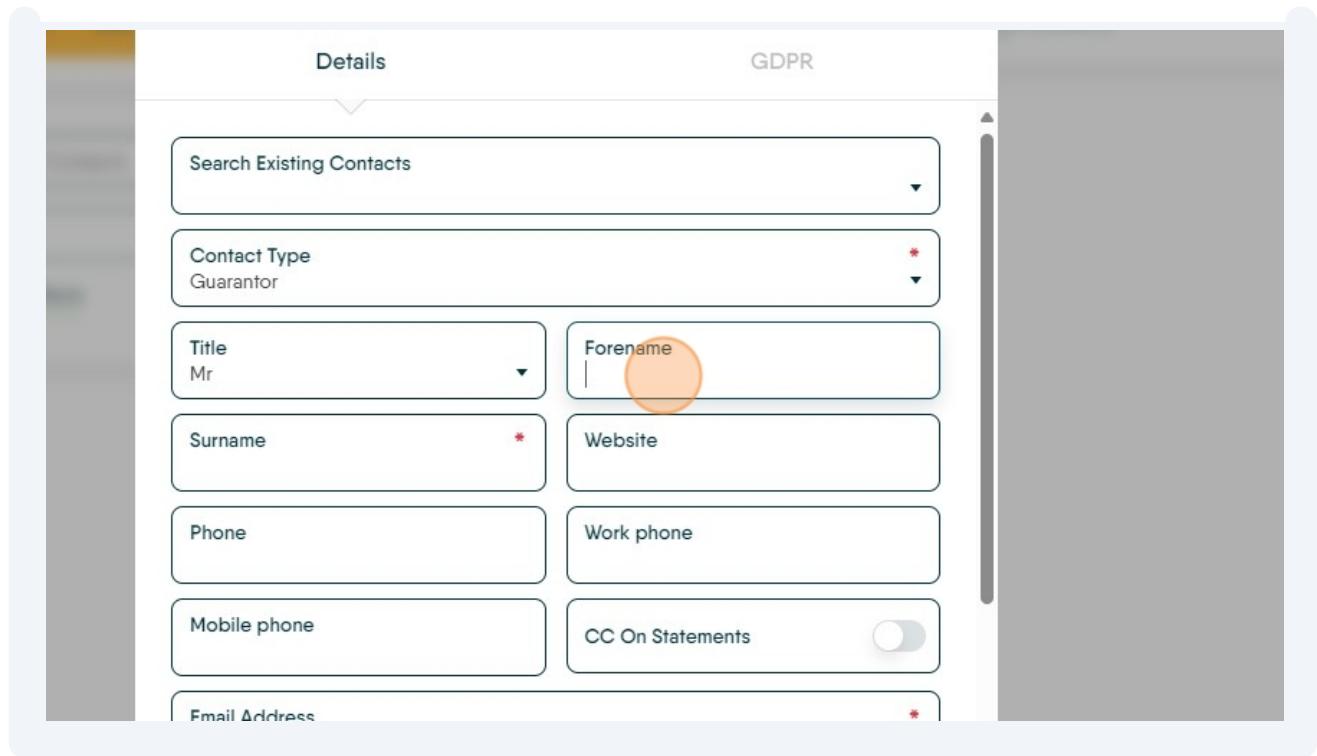
Phone

Work phone

Mobile phone

CC On Statements

Email Address \*



14 Click this text field. Type the Postcode and click the search icon, select the address from the list and edit if required.

Click "Save Contact"

013320000

Mobile phone  
078632566222

CC On Statements

Email Address  
zagg.dave@gmail.com

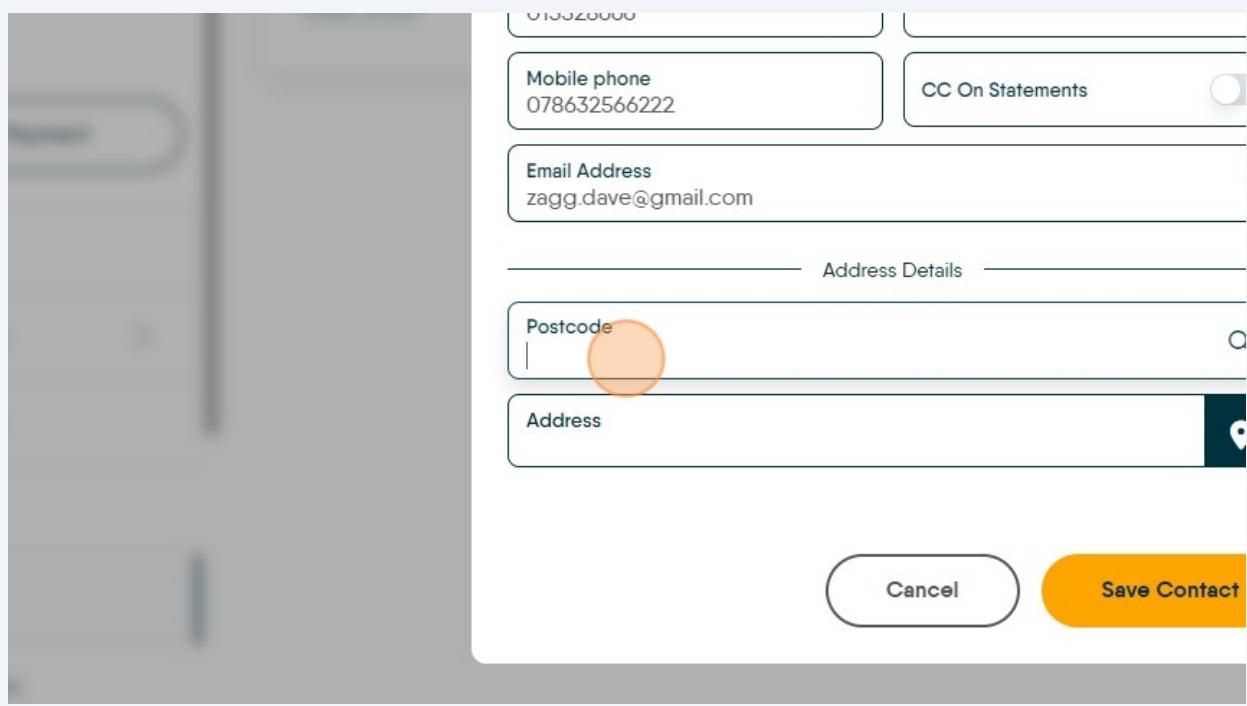
Address Details

Postcode

Address

Cancel

Save Contact



Phone  
66222

CC On Statements

Address  
ve@gmail.com \*

Address Details

Select Address --

ierford Projects Ltd 17 Barrett Road, Darlington, County  
ham, DL38LA, UK

arrett Road, Darlington, County Durham, DL38LA, UK

arrett Road, Darlington, County Durham, DL38LA, UK

arrett Road, Darlington, County Durham, DL38LA, UK

Address  
Select Address --

Phone  
532566222

CC On Statements

I Address \*  
j.dave@gmail.com

Address Details

code  
8LA

ress  
erford Projects Ltd 17 Barrett Road, Darlington, County Durham, DL...

Cancel Save Contact

15 Return to the Vision+ screen Click "Select guarantor" and search for Guarantor.

Do this for all records that require a guarantor.

① Product Options

② Tenancy

③ Guarantors

④ Review

Does Davidna require a guarantor?

Yes  No

Select existing guarantor + Add new guarantor

Guarantor  
Select guarantor

Please enter 3 or more characters

DM Mr David Morgan

Prev Next

**16** When complete. Click "Next"

Mr David Morgan

Does David require a guarantor?

Yes  No

Prev **Next**

**17** Click the "Rent Share" field and share the rent between the Tenants.

If you have multiple tenants remember to share the rent across the tenants if they are paying a portion each. It can negatively effect the referencing if one Tenant is allocated all the rent .

Address:  
399 Kingsway, Darlington

Request Type:  
Rent Guarantee Monthly (Ultimate Reference) - Without Right To Rent Check.

Tenant(s):  
Miss Davidna Morgan

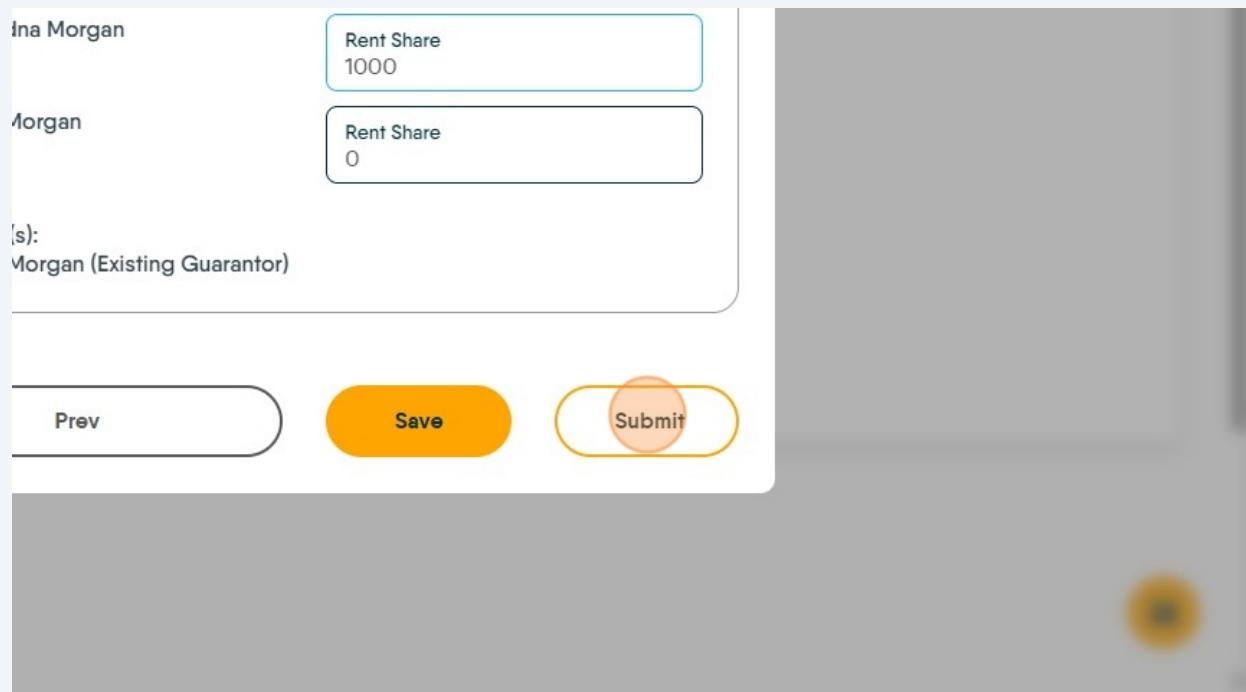
Mr David Morgan

Rent Share  
1000

Rent Share  
0

Guarantor(s):  
Mr Arthur Morgan (Existing Guarantor)

**18** Click "Submit"



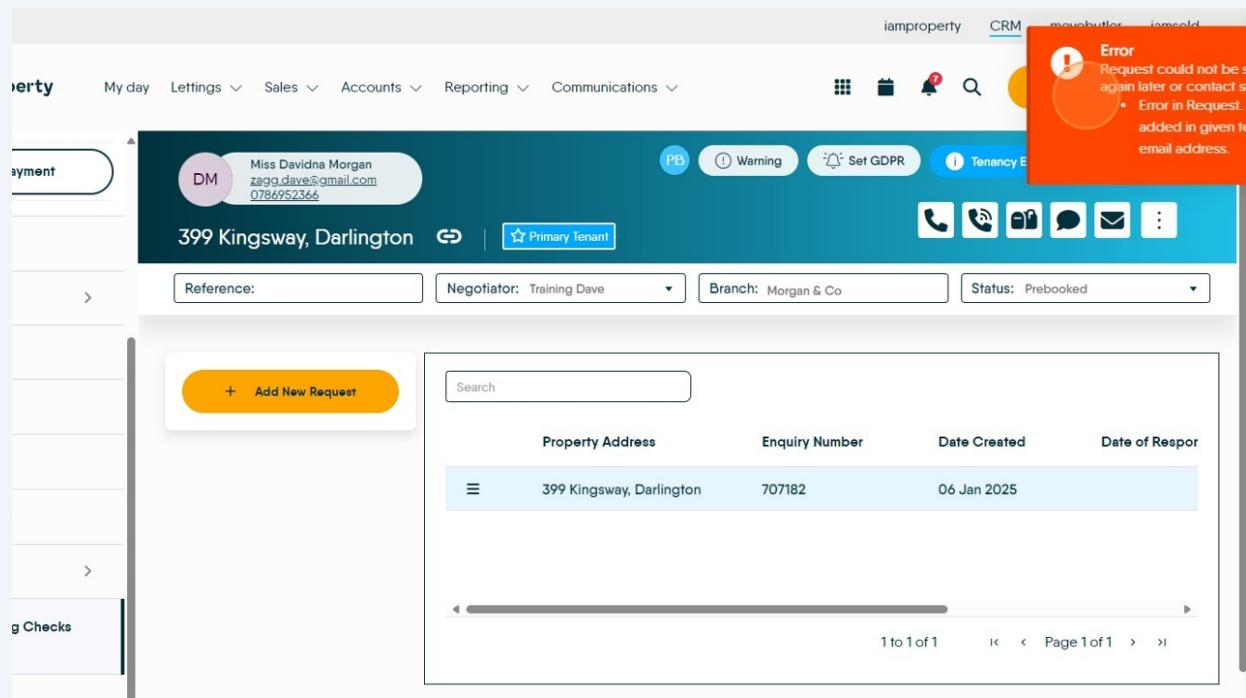
Ina Morgan      Rent Share  
1000

Morgan      Rent Share  
0

[s]:  
Morgan (Existing Guarantor)

Prev      Save      Submit

**19** You may see an error message if there has been an issue. Read the error and repair the issue.



My day    Lettings    Sales    Accounts    Reporting    Communications

399 Kingsway, Darlington    Primary Tenant

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

+ Add New Request

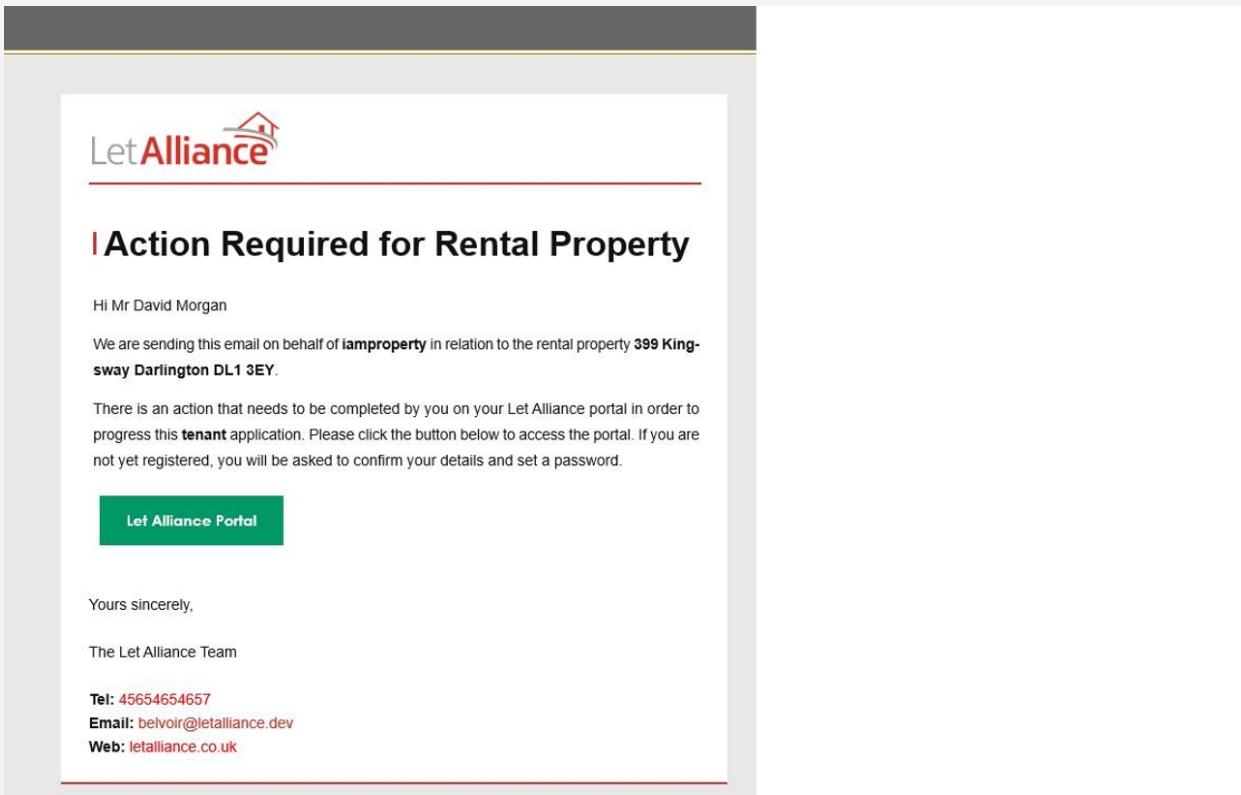
Search

Property Address	Enquiry Number	Date Created	Date of Response
399 Kingsway, Darlington	707182	06 Jan 2025	

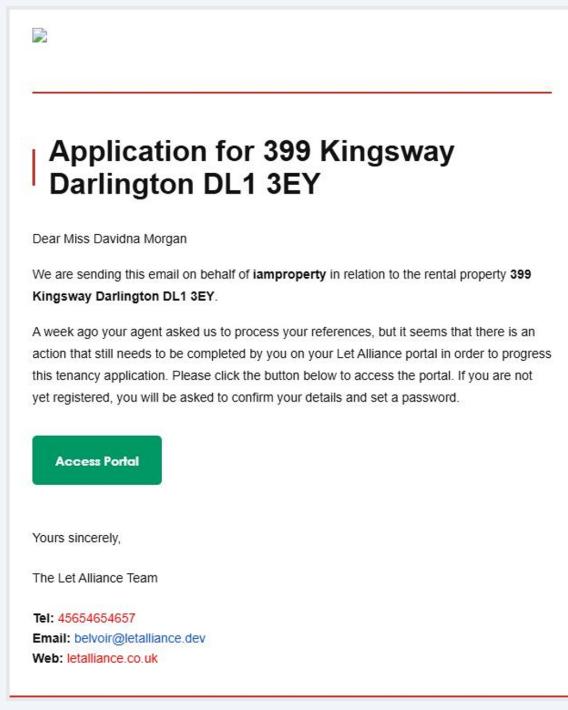
1 to 1 of 1    Page 1 of 1

## What the Applicants receive

20 Your Applicants will receive an email with a link to access the Let Alliance portal



**21** If a response isn't received this is chased after one week.



Alert! At this point it is up to your client to respond to the email and complete the referencing request. Vision+ will send out reminders to chase a response.

You can track responses from within the Tenant Record and the vision+ screen