

# 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+)"

399 Kingsway, Darlington		
Reference:	Negotiator: Training Dave	Branch:
Tenant Rent Details		
Rent £ 1000.00	Deposit  1153.84	Holding Deposit  230.76
Rent Period 		

**3** Click "Add New Request"

Reference:  Negotiator: Training Dave  Branch: Morgan & Co

**+ Add New Request**

  
**No requests**  
You have no reference requests

**Add New Request**

**4** Click the product type you want to use.

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

**Add New Request**

**1 Product Options**

**2 Tenancy**

**3 Guarantors**

**4 Review**

**Select product type**

☐ Rent Guarantee Monthly ☐ Rent Guarantee Annual

☐ Ultimate & Legal Annual ☐ Standalone

**Select reference type**

☐ Ultimate Reference ☐ Express Reference

**Close** **Next**



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.

**Add New Request**

**1 Product Options**

**2 Tenancy**

**3 Guarantors**

**4 Review**

**Select product type**

☒ Rent Guarantee Monthly ☐ Rent Guarantee Annual

☐ Ultimate & Legal Annual ☐ Standalone

**Select reference type**

☐ Ultimate Reference ☐ Express Reference

**Close** **Next**

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.

The screenshot shows a web interface with a dark teal sidebar on the left containing a numbered list: 1 Product Options, 2 Tenancy, 3 Guarantors, and 4 Review. The main content area is white and titled 'Property' at the top. Below the title is a rounded rectangle containing a house icon and the text '399 Kingsway, Darlington'. Underneath this is a section titled 'Tenants' containing a rounded rectangle with a purple circle containing 'DM' and the text 'Miss Davidna Morgan'. Below the tenants section is a button labeled '+ Add Another Tenant / Applicant'. At the bottom of the main area are two buttons: 'Prev' and 'Next'. The 'Next' button is highlighted with a yellow border and a yellow circle.

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

This screenshot shows the same interface as the previous one, but with the '+ Add Another Tenant / Applicant' button highlighted by a yellow circle. Below this button, a new section appears with the heading 'Select existing tenant' and a text input field labeled 'Tenant'. To the right of this section is a link that says '+ Add new applicant'. The 'Prev' and 'Next' buttons remain at the bottom, with 'Next' still highlighted with a yellow border.

8

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

**Add New Request**

Tenants

DM Miss Davidna Morgan

+ Add Another Tenant / Applicant

Select existing tenant

+ Add new applicant

Tenant  
Select tenant

Please enter 3 or more characters

Prev Next

9

Click "Add Tenant To Request"

399 Kingsway, Darlington

Tenants

DM Miss Davidna Morgan

DM Mr David Morgan

+ Add Another Tenant / Applicant

Prev Next

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

399 Kingsway, Darlington

Tenants

DM Miss Davidna Morgan

DM Mr David Morgan

+ Add Another Tenant / Applicant

Prev Next

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

## Add New Request

DM Miss Davidna Morgan

Does Davidna require a guarantor?

☒ Yes ☐ No

DM 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"

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

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.

DM Miss Davidna Morgan

Does Davidna require a guarantor?

☒ Yes ☐ No

Select existing guarantor + Add new guarantor

Guarantor  
Select guarantor

Prev Next

Rent Amount **£ 1000.00**

Rent Period **Monthly**

Rent Due **6 Jan 2025**

Overdue Balance **£0.00**

Overdue Date

Days Overdue **0**

Last Contacted

+ New Contact

Sort Contacts ▾

Search

Clear filters

DM

David morgan  
david.morgan@iamprop...  
01865860873

Details

GDPR

Search Existing Contacts

Contact Type

Title  
Select Title ▾

Forename

Surname \*

Website

Phone

Work phone

Mobile 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

9

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"

Mobile phone

078632566222

CC On Statements

Email Address

zagg.dave@gmail.com

Address Details

Postcode

Address

Cancel

Save Contact

Address

Select Address --

- Barrett Road, Darlington, County Durham, DL38LA, UK
- Barrett Road, Darlington, County Durham, DL38LA, UK
- Barrett Road, Darlington, County Durham, DL38LA, UK
- Barrett Road, Darlington, County Durham, DL38LA, UK

Cancel Save Contact

Mobile phone  
532566222

CC On Statements ☐

Email Address  
g.dave@gmail.com

Address Details

Postcode  
BLA

Address  
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"

DM Mr David Morgan

Does David require a guarantor?

☐ Yes ☒ No

Prev Next

This screenshot shows a form for Mr David Morgan. The question 'Does David require a guarantor?' has 'No' selected. The 'Next' button is highlighted with an orange circle.

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 .

ons

Address:  
399 Kingsway, Darlington

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

Tenant(s):  
Miss Davidna Morgan

Mr David Morgan

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

Rent Share  
1000

Rent Share  
0

This screenshot shows a form with tenant details. The 'Rent Share' field for Miss Davidna Morgan is highlighted with an orange circle and contains the value '1000'. The 'Rent Share' field for Mr David Morgan contains the value '0'.

## 18 Click "Submit"

ina Morgan

Morgan

(s):  
Morgan (Existing Guarantor)

Rent Share  
1000

Rent Share  
0

Prev Save Submit

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

iamproperty CRM

My day Lettings Sales Accounts Reporting Communications

DM Miss Davidna Morgan  
zaga.dave@gmail.com  
0786952366

399 Kingsway, Darlington Primary Tenant

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

+ Add New Request

Search

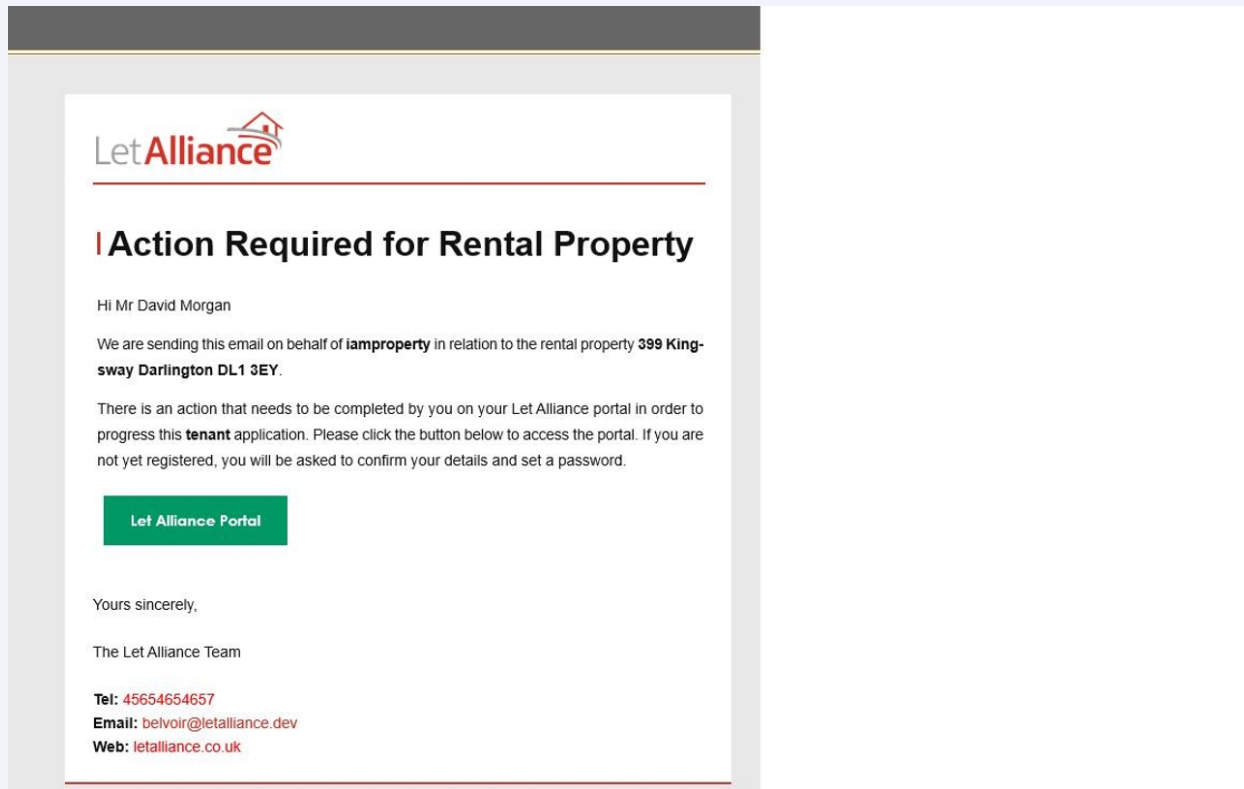
Property Address	Enquiry Number	Date Created	Date of Respor
399 Kingsway, Darlington	707182	06 Jan 2025	

1 to 1 of 1 Page 1 of 1

Error  
Request could not be s  
again later or contact su  
Error in Request /  
added in given te  
email address.

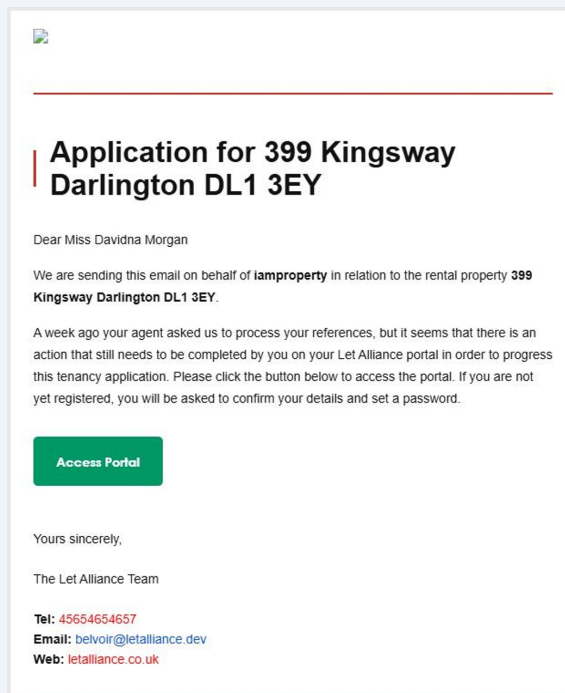
## What the Applicants receive

- 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