

# Activating a Tenancy



This guide provides a straightforward process for activating a tenancy, ensuring compliance with deposit protection requirements. By following these steps, users can efficiently verify necessary information and successfully activate the tenancy, avoiding potential issues. It's a valuable resource for anyone involved in property management, streamlining the activation workflow and ensuring all regulatory checks are met.

## 1 Navigate to the Pre Booked Tenant record.

The screenshot shows the iam property software interface. The top navigation bar includes 'My day', 'Lettings', 'Sales', 'Accounts', 'Reporting', 'Communications', and 'My account'. The main content area displays a tenant record for 'Ms lettings Applicant137' with the email 'zagg.dave@gmail.com' and ID '6456215456'. The address is '17 Yew Tree Close, Hurworth, Darlington'. The tenant is marked as a 'Primary Tenant'. The 'Tenancy Expiry' is set to '355 Days'. Below this, there are buttons for phone, email, and messaging. The left sidebar shows a navigation menu with 'Counts', 'Rental', 'Balance', 'Due', 'Treated', 'Details', 'Accounts', 'Checklist', 'Financial', 'Contacts', and 'Documents'. The 'Rental' section is expanded, showing 'Rent' (£1100.00), 'Deposit' (£1269.23), 'Holding Deposit' (£253.84), 'Collection Day' (Same Day), and 'Next Rent Due' (26/02/2025). The 'Rent Period' is set to 'Monthly'.

2 Click "Tenancy"

Ms lettings Applicant137  
zagg.dave@gmail.com  
6456215456

17 Yew Tree Close, Hurworth, Darlington

Primary Tenant

Rent: £1100.00

Deposit: £1269.23

Holding Deposit: £253.84

Collection Day: Same Day

Next Rent Due: 26/02/2025

3 Click "Compliance" and check the Deposit Protection Scheme information is correctly set.

It is probable that the DPS info is already completed, however you cannot move on without the DPS information being complete.

Total Rent: £ 1100.00

Total Deposit: £ 1269.23

Status: Pre Booked

Details

IA

lettings Applicant137  
zagg.dave@gmail.com  
6456215456

17 Yew Tree Close, Hurworth, Darlington

Reference: [ ]

Negotiator: Training Dave

Branch: Morgan & Co

Status: Prebooked

Compliance

Renewals Checklist

Tenancy Dates

Tenancy Start: 26/02/2025

Tenancy End: 25/02/2026

Renewal Start: 26/02/2025

Vacating Date: 06/03/2025

Visit Next Due: 06/03/2025

Tenancy Details

Lease Period: 12 Month Shorthold

Relocation Agent: [ ]

Agreement Name: Applicant137

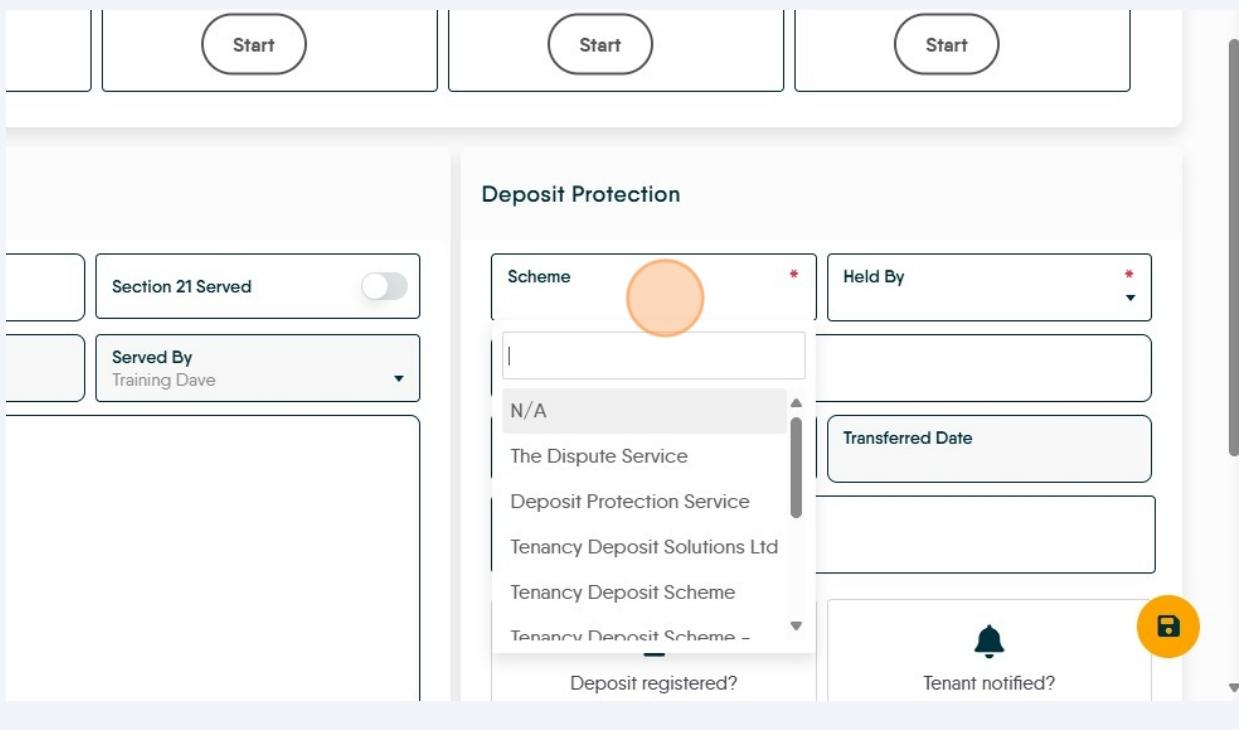
General Information

With Effect Break: [ ]

Notice Date: [ ]

Break Clause: [B] [I] [U] [X]

4 Click here.



Deposit Protection

Section 21 Served

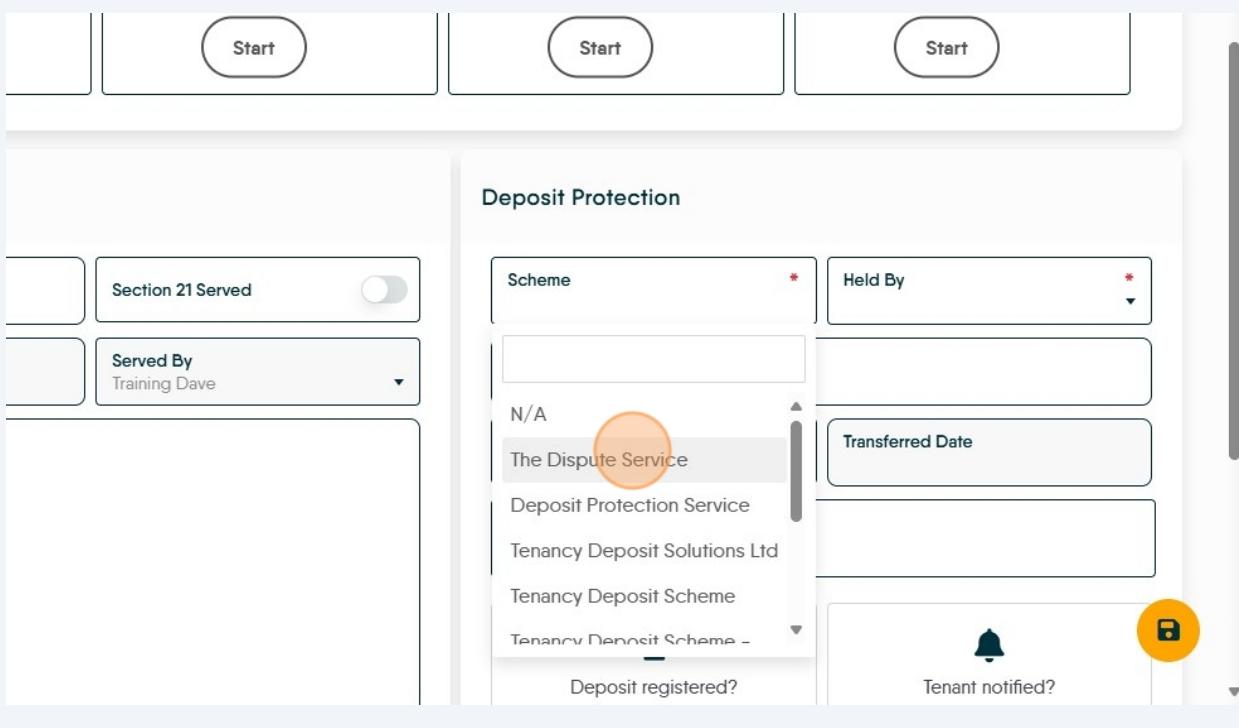
Served By Training Dave

Scheme  \* Held By  \*

- N/A
- The Dispute Service
- Deposit Protection Service
- Tenancy Deposit Solutions Ltd
- Tenancy Deposit Scheme
- Tenancy Deposit Scheme -

Deposit registered? Tenant notified?

5 From the list, select the service you use.



Deposit Protection

Section 21 Served

Served By Training Dave

Scheme  \* Held By  \*

- N/A
- The Dispute Service
- Deposit Protection Service
- Tenancy Deposit Solutions Ltd
- Tenancy Deposit Scheme
- Tenancy Deposit Scheme -

Deposit registered? Tenant notified?

6 Click here to note who holds the deposit. Pick from the list, then click 'Save'

Deposit Protection

Scheme: The Dispute Service

Held By:

- Agent
- Landlord
- Scheme
- N/A

Transferred?

Deposit Transferred on

£ Deposit registered?

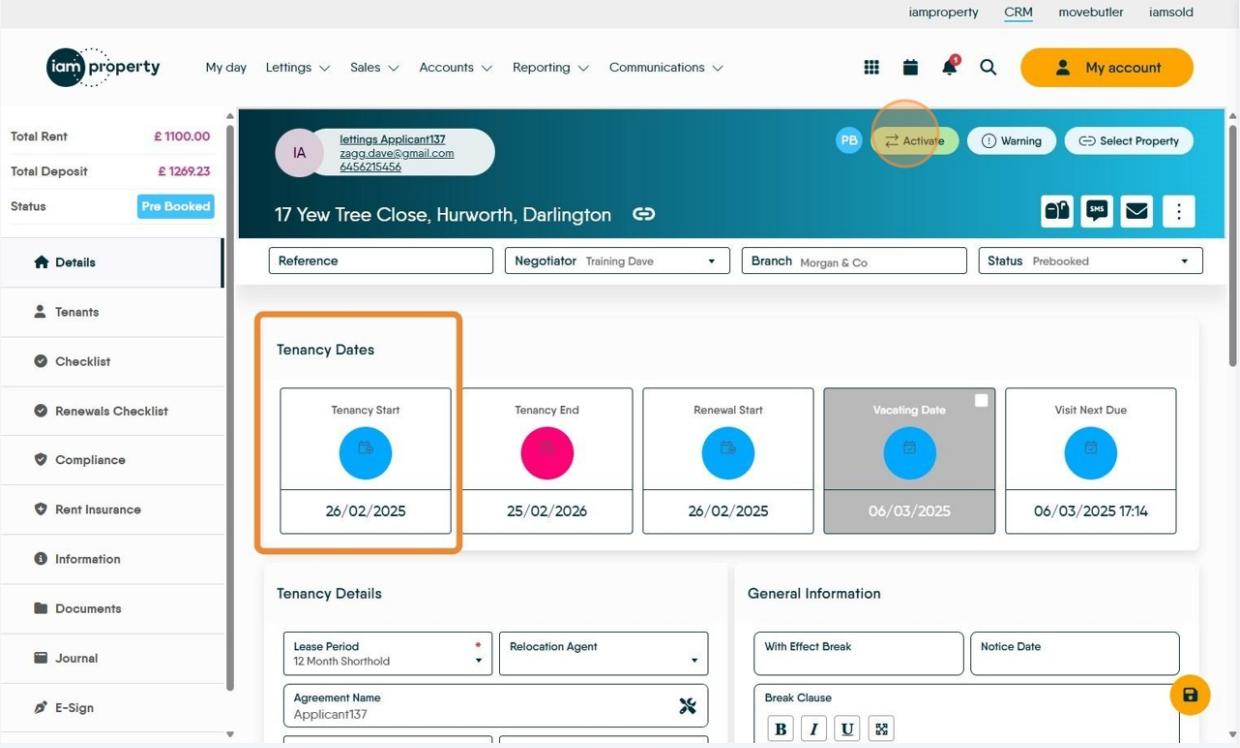
Bell Tenant notified?



Alert! Remember to Click SAVE

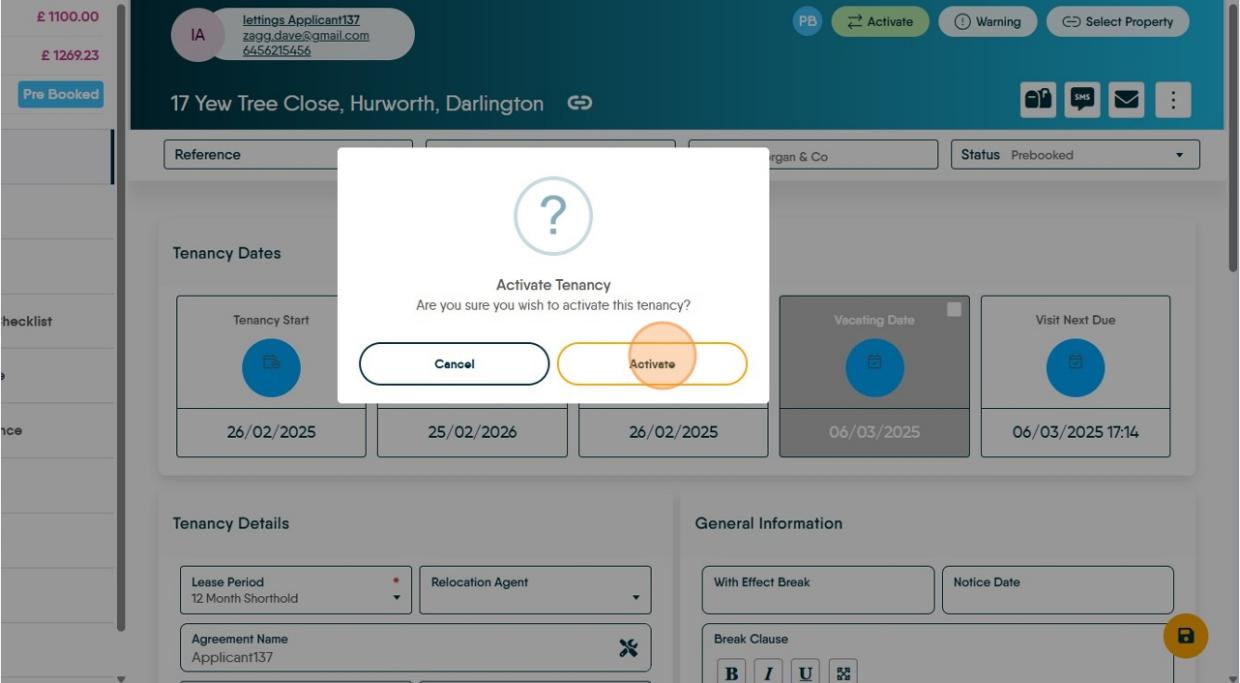
7 Click back to the "Details" screen and check the Tenancy Start dates (highlighted) are correct and set a 'Next Visit Due' if required.

Click "Activate"



The screenshot shows the 'Details' screen for a tenancy. The 'Tenancy Dates' section is highlighted with an orange box, showing the 'Tenancy Start' date as 26/02/2025. The 'Activate' button in the top right corner is also highlighted with an orange circle.

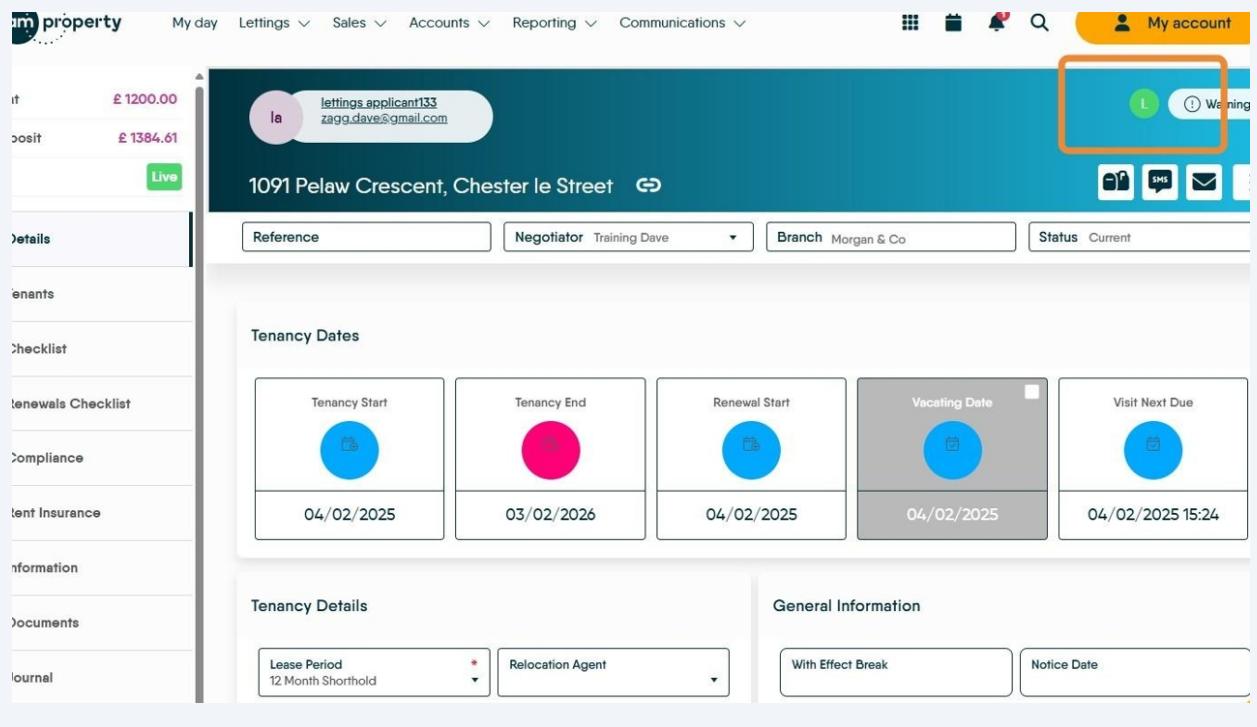
8 Click "Activate"



The screenshot shows a confirmation dialog box titled 'Activate Tenancy' with the message 'Are you sure you wish to activate this tenancy?'. The 'Activate' button is highlighted with an orange circle.

9

The Tenancy will now be active and you will see a green L in the top right corner (as highlighted)



The screenshot shows the OnProperty software interface. At the top, there is a navigation bar with links for 'My day', 'Lettings', 'Sales', 'Accounts', 'Reporting', and 'Communications'. On the far right of the header, there is a 'My account' button with a green 'L' icon and a 'Warning' message. The main content area displays a tenancy record for a property at 1091 Pelaw Crescent, Chester le Street. The record includes fields for 'Reference' (empty), 'Negotiator' (Training Dave), 'Branch' (Morgan & Co), and 'Status' (Current). Below this, there is a section titled 'Tenancy Dates' with five boxes: 'Tenancy Start' (04/02/2025), 'Tenancy End' (03/02/2026), 'Renewal Start' (04/02/2025), 'Vacating Date' (04/02/2025), and 'Visit Next Due' (04/02/2025 15:24). There are also sections for 'Tenancy Details' (Lease Period: 12 Month Shorthold) and 'General Information' (With Effect Break and Notice Date fields).