

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.

iam property

My day Lettings Sales Accounts Reporting Communications

My account

Account

£ 1100.00

Period

Monthly

26 Feb 2025

Balance

£0.00

Date

Period due

0

Contracted

Details

Accounts

Checklist

Financial

Contacts

Documents

IA

Ms Lettings Applicant137
zagg.dave@gmail.com
6456215456

PB

Warning

Set GDPR

Tenancy Expiry 355 Days

Tenancy

17 Yew Tree Close, Hurworth, Darlington

Primary Tenant

Reference:

Negotiator: Training Dave

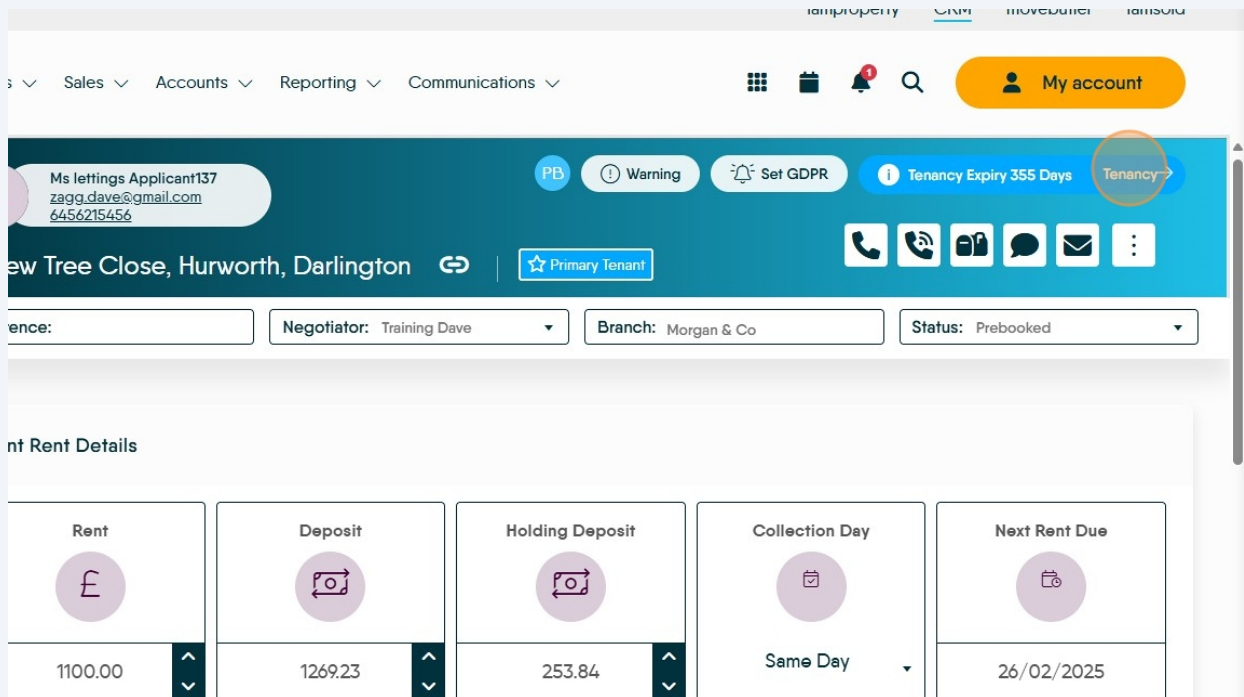
Branch: Morgan & Co

Status: Prebooked

Tenant Rent Details

<div>Rent</div> <div>£</div> <div>1100.00</div>	<div>Deposit</div> <div>1269.23</div>	<div>Holding Deposit</div> <div>253.84</div>	<div>Collection Day</div> <div>Same Day</div>	<div>Next Rent Due</div> <div>26/02/2025</div>
<div>Rent Period</div> <div>Monthly</div>				

2 Click "Tenancy"



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PB Warning Set GDPR Tenancy Expiry 355 Days Tenancy

17 Yew Tree Close, Hurworth, Darlington Primary Tenant

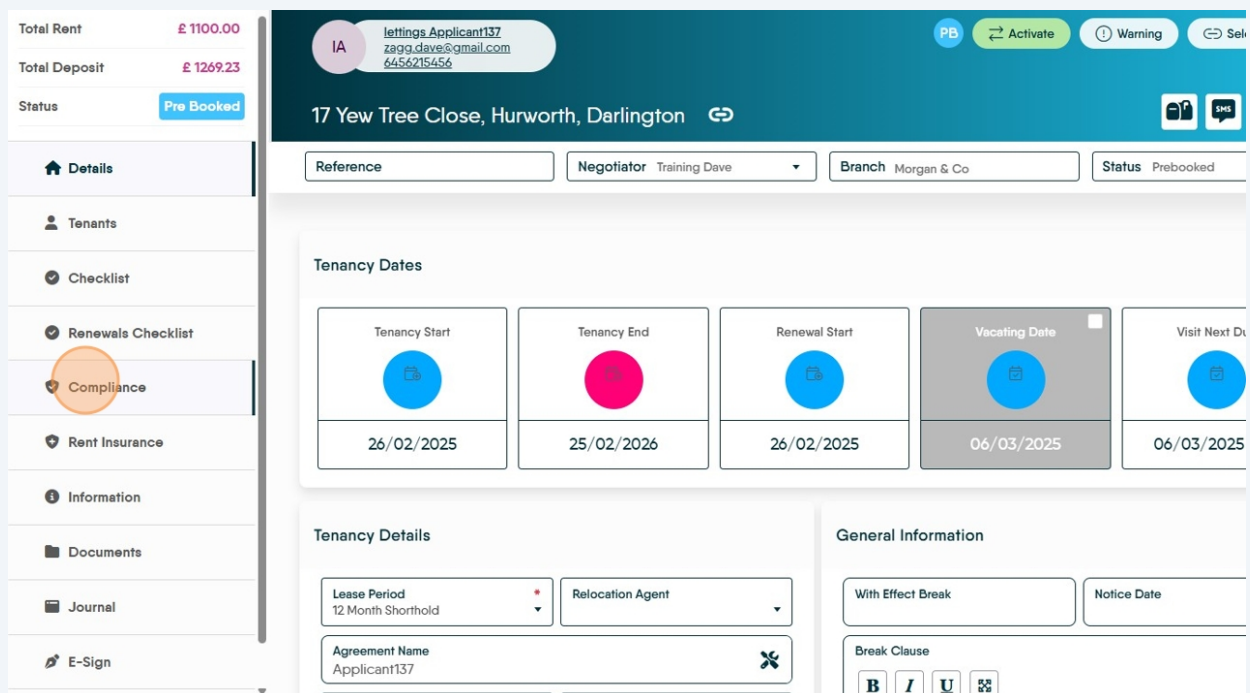
Reference: Negotiator: Training Dave Branch: Morgan & Co Status: Prebooked

Rent Details

Rent	Deposit	Holding Deposit	Collection Day	Next Rent Due
£				
1100.00	1269.23	253.84	Same Day	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

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PB Activate Warning Set

17 Yew Tree Close, Hurworth, Darlington

Reference Negotiator Training Dave Branch Morgan & Co Status Prebooked

Tenancy Dates

Tenancy Start	Tenancy End	Renewal Start	Vacating Date	Visit Next Due
26/02/2025	25/02/2026	26/02/2025	06/03/2025	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.

The screenshot shows a web form titled "Deposit Protection". At the top, there are three "Start" buttons. On the left, there are two input fields: "Section 21 Served" with a toggle switch and "Served By" with a dropdown menu showing "Training Dave". The main form area has a "Scheme" dropdown menu with an orange circle highlighting it. The dropdown list is open, showing options: "N/A", "The Dispute Service", "Deposit Protection Service", "Tenancy Deposit Solutions Ltd", "Tenancy Deposit Scheme", and "Tenancy Deposit Scheme -". To the right of the "Scheme" dropdown are fields for "Held By" (with a dropdown arrow), "Transferred Date", and a "Tenant notified?" checkbox with a bell icon. At the bottom, there is a "Deposit registered?" checkbox.

5 From the list, select the service you use.

This screenshot is identical to the one above, but the "Scheme" dropdown menu is now closed, and "The Dispute Service" is selected and highlighted in the dropdown list. The orange circle remains on the dropdown menu.

6

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

Deposit Protection

1 Served ☐

y
Save

Scheme *
The Dispute Service

Reference

Transferred? ☐

Deposit Transferred on

Held By *

Agent


Landlord

Scheme

N/A

£
Deposit registered?

🔔
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 IAM Property software interface. The top navigation bar includes links for iamproperty, CRM, movebutler, and iamsold. The left sidebar contains a menu with options like Details, Tenants, Checklist, Renewals Checklist, Compliance, Rent Insurance, Information, Documents, Journal, and E-Sign. The main content area displays the details for a tenancy at 17 Yew Tree Close, Hurworth, Darlington. The 'Tenancy Dates' section is highlighted with an orange box, showing the following dates: Tenancy Start (26/02/2025), Tenancy End (25/02/2026), Renewal Start (26/02/2025), Vacating Date (06/03/2025), and Visit Next Due (06/03/2025 17:14). The 'Activate' button is circled in green.

8

Click "Activate"

The screenshot shows the IAM Property software interface with a confirmation dialog box in the center. The dialog box has a question mark icon and the text 'Activate Tenancy' and 'Are you sure you wish to activate this tenancy?'. There are two buttons: 'Cancel' and 'Activate'. The 'Activate' button is highlighted with an orange circle. The background shows the same tenancy details as the previous screenshot, but they are slightly faded.

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 'm property' dashboard. The top navigation bar includes 'My day', 'Lettings', 'Sales', 'Accounts', 'Reporting', and 'Communications'. The user's account is 'My account'. The main content area displays a tenancy card for '1091 Pelaw Crescent, Chester le Street'. The card is highlighted with an orange box. In the top right corner of the card, there is a green 'L' icon, which is highlighted by an orange box. Below the card, the 'Tenancy Dates' section shows five cards: '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). The 'Tenancy Details' section shows 'Lease Period' (12 Month Shorthold) and 'Relocation Agent'. The 'General Information' section shows 'With Effect Break' and 'Notice Date'.

£ 1200.00
£ 1384.61
Live

Details
Tenants
Checklist
Renewals Checklist
Compliance
Rent Insurance
Information
Documents
Journal

1091 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
04/02/2025	03/02/2026	04/02/2025	04/02/2025	04/02/2025 15:24

Tenancy Details

Lease Period: 12 Month Shorthold
Relocation Agent

General Information

With Effect Break
Notice Date