



# CRM HOW TO GUIDES

**LETZONE**

# HOW TO USE LETZONE

## Getting started

To access LetZone. In the top navigation menu Select Lettings then LetZone.

## LetZone dashboard

The top of the screen shows a graphical status of all current Tenancy Applications.

Once a tenancy is selected the progress is displayed in the middle box.

The main screen shows a list of all the Tenancy Applications and the process milestones.

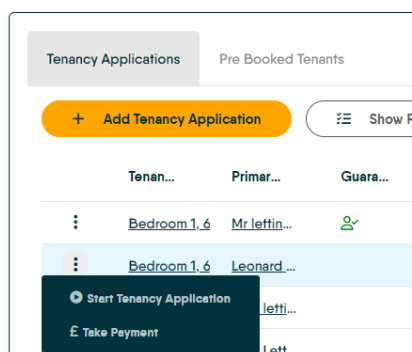
## Create an Application

To start, you need to create a Tenancy Application, to do this click on '+ Add Tenancy Application'.

In the next screen, search for the property in the 'Select Property' field and select, or click the + to add a new property. If the property is an existing rental property, the Landlord information will be pulled in automatically, otherwise details can be added. Then search for or click + to create a new Applicant then click Add, replicate this process to add all the applicants for the property.

The screenshot shows the LetZone dashboard interface. At the top, the 'iam property' logo is on the left, and a navigation menu includes 'My dashboard', 'Lettings', 'Sales', 'Accounts', 'Reporting', and 'Communications'. Below this, a sub-menu shows 'Lettings dashboard', 'General', and 'Property management'. An orange callout box labeled 'Top Navigation menu' points to the 'Lettings' menu item. The main content area is divided into two columns: 'Applicant match' and 'Guarantors'. The 'Applicant match' column has sections for 'Applicants' and 'E-sign'. The 'Guarantors' column has sections for 'Landlords' and 'Letzone'. An orange callout box labeled 'LetZone tab' points to the 'Letzone' link. Below this is a 'Tenancy Applications Overview' section with a bar chart showing the status of various applications: 'Awaiting Lease' (3), 'Awaiting Holding Deposit' (0), 'Awaiting Documents' (1), 'Documents in House' (0), 'Awaiting Referencing' (1), 'Awaiting Signature' (3), 'Agreements to Sign' (0), 'Awaiting Final Payment' (0), and 'Awaiting Move In' (1). Below the chart is a 'Tenancy Application Progress' section with a circular arrow icon and the text 'Please select a tenancy application to refresh'. The main section is titled 'Tenancy Applications' and 'Pre Booked Tenants'. It features a '+ Add Tenancy Application' button and a 'Show References List' button. Below these is a table with columns: 'Tenan...', 'Primar...', 'Guara...', 'Applic...', 'Details', 'Holdin...', and 'Docu...'. The table contains several rows of data, including 'Bedroom 1.63', 'Mr Lettin...', 'Leonard...', 'Miss Letti...', '92 Pelaw Cres', 'Miss Lett...', '6 Park View R...', 'Mr Ron B...', and '1 Hulham Road', 'Miss Jan...'. An orange callout box labeled 'Click here to start new Tenancy Application' points to the first row. Another orange callout box labeled 'Click + to add new Property or Applicant.' points to the '+ Add Tenancy Application' button. A third orange callout box labeled 'Click + to add new Property or Applicant.' points to the '+' icon in the 'Select property' field of the 'Add new Tenancy Application' form. A fourth orange callout box labeled 'Click to Add Applicant' points to the 'Add' button in the 'Add new Tenancy Application' form.





Hi, James Morgan,

Welcome to LetZone

Here is your login and password to access LetZone:

Login: **JMorgan40**

Password:

Click [here](#) to access your LetZone dashboard.



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## Applicant Login

If the tenancy is started outside of LetZone, the Tenancy Application will automatically appear in LetZone, however the LetZone Welcome email won't have been sent. You will need to send the Welcome Email from LetZone.

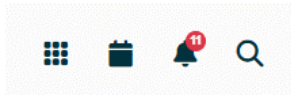
To do this. From the Pre-Booked Tenants Tab: Three-dot menu, click on Start Tenancy Application.

Once the Application has been created, the Applicant (Pre-Booked Tenant) will automatically receive an email, similar to this, with a username and password. Clicking on the link will take the Applicant to the LetZone Tenant portal (covered in another Guide).

This email can be edited in the LetZone configuration settings (shown at the end of this guide).

If a Guarantor is required on this application, they can be added via the Tenancy Agreement or by the Applicant via the LetZone Portal. Either option will send the Guarantor a link to the LetZone portal.

# Milestones



At each step along the process, every time the Tenant updates a milestone, you will receive a notification. As will the Applicant whenever you update a milestone. This notification will be in the 'Bell' notifications in iamPropertyCRM and an email.

## Details.

The first milestone is Details, once the Applicant has logged into the LetZone Portal and checked their details this will be 'ticked'. The Tenant also has the ability, from within the portal, to add a Guarantor if required.

## Holding Deposit

Once you are certain that the holding deposit has been received, click the Three-dot menu (next to Property details) and click on 'Holding Deposit Received', acknowledge the warning message and that days date will be added to the column marked 'Holding Deposit'. This can (if enabled) be taken by clicking the '£ Take Payment' option.

Property	Applicant	Milestone	Date	Status
23 Harvest W	Micheal ...	2024-03...	→	
		2024-03...	✓	
		2024-03...	✓	
		2024-02...	✓	
		2023-11-...	→	

Green tick shows completion of milestone.

Option to take card payment

Click here to note Holding Deposit received

Date Holding Deposit taken.

## Documents

The Applicants right to rent documents can be uploaded by them from the Tenant Portal or, uploaded by you from within the Pre-Booked Tenants tab, or within the Tenant record. To upload yourself, click on the property details to jump to the Pre-Booked tenant, then click on the Three-dot menu and 'Upload Documents' to jump to the Tenant record.

Once the documents have been uploaded there will be an orange triangle, this will show until the Right to Rent documents are approved.

Either way the documents will show in the documents tab in the Tenant Record.

To approve or reject the documents, click on the Three-dot menu and select 'Approve' or 'Reject', once approved a green tick will show.

Tenancy Applications		Pre Booked Tenants					
+ Add Tenancy Application		Show References List					
Tenan...	Primer...	Guara...	Applic...	Details	Holdin...	Docu...	Refere...
⋮	Bedroom 1.63	Mr Lettin...	2024-04...	✓	→	▲	—
⋮	Bedroom 1.63	Leonard...		—	—	—	—
⋮	Bedroom 1.63	Miss Letti...	2024-04...	✓	2024-04...	✓	—
⋮	92 Pelaw Cres	Miss Lett...		—	—	—	—
⋮	6 Park View R...	Mr Ron B...	2024-04...	✓	2024-04...	✓	✓
⋮	1 Hulham Roa...	Miss Jan...	2024-04...	→	—	—	—
⋮	Barton 7 A3	Annalan		—	—	—	—

Click here to review documents and qualifying questions

- Resend Welcome E-mail
- Approve Documents
- Reject Documents
- Upload Documents
- Get Credit Check
- Set Credit Check as Low
- Set Credit Check as Medium
- Set Credit Check as High
- Skip Risk Assessment
- View Tenant Record (Letzone)
- View Guarantor
- Email Guarantor

Click here to manually set credit score

Approve Documents here

Here to request Credit check via Rightmove

Resend Welcome E-mail	✓	20:
Get Credit Check	—	—
Set Credit Check as Low	✓	20:
Set Credit Check as Medium	→	—
Set Credit Check as High	—	—
Skip Risk Assessment	—	—
Request Reference	→	—
Skip Reference	✓	20:
View Tenant Record (Letzone)	✓	20:
View Guarantor	—	—
Email Guarantor	—	—
Take Payment	—	—

Here to request or skip Reference

## Risk Assessment, Quality Assurance and Referencing

Referencing and Credit Check are carried out using Rightmove Referencing service. If you don't use this service, referencing can be skipped if using an alternate referencing method and Credit Check response can be set manually (low/medium/high).

Risk Assessment is set in the Tenant Record, risk tiers are set in LetZone configuration.

Reference status will need to be monitored for each application, as selecting 'Request Reference' or



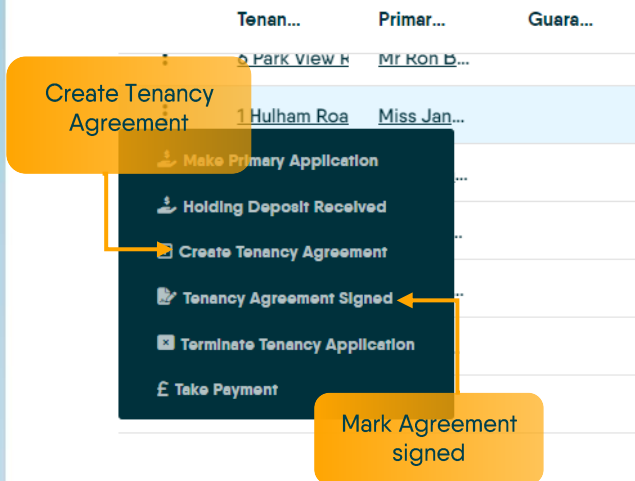
'Skip Reference' will mark this milestone as completed.

## Create Tenancy Agreement

Once the Credit and Referencing checks have been passed. Create the Tenancy Agreement by clicking on the Three-dot menu and selecting 'Create Tenancy Agreement'.

The Tenancy Agreement is created in the normal way and can be sent by e-sign if using DocuSign integration.

Once signed select the 'Tenancy Agreement' signed option to mark the milestone complete.



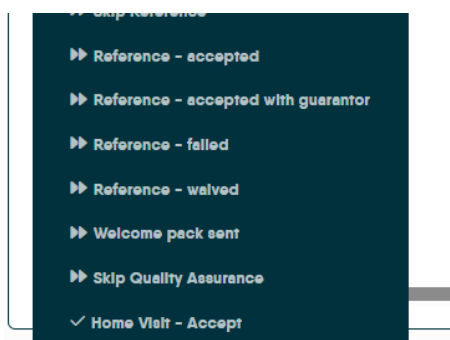
## Final Steps

Once the Tenancy Agreement is signed, the next steps are to collect the Final Payment, issue the 'Welcome Pack', Declaration and for the Tenant to move in.



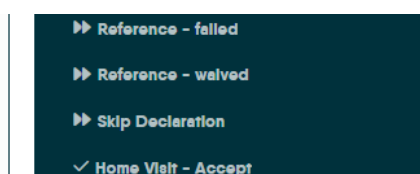
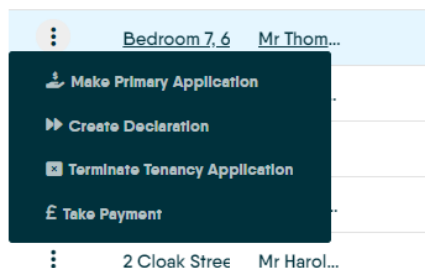
## Final Payment

Once you know the final payment has been made, click on the Three-dot-menu in the Tenancy Application tab and click on 'Collected Final Payment' this will mark the milestone as completed.



## Welcome Pack

'Welcome Pack Sent' is simply for making a record of whether the agent has sent a welcome pack containing legally required information. Once sent, from the Tenancy Applications tab click on the property address, then click on the Three-dot menu and select 'Welcome Pack Sent' to mark this milestone completed.



## Declaration

This is an optional item, that can be skipped. The declaration can be used as you wish, an example would be to have Tenant sign off to say they have received all the prescribed information.

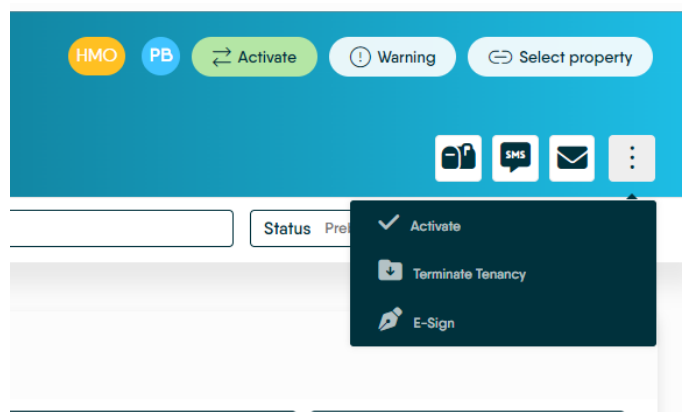
To create a declaration; from the Three-dot menu in the Tenancy Application row, select 'Create Declaration'. This will open the letters screen and allow a template to be selected and the document to be created and sent.

To skip creating the Declaration, click on the property address in Tenancy Applications screen and then the Three-dot menu in the Pre-Booked tenants information.

## Move In

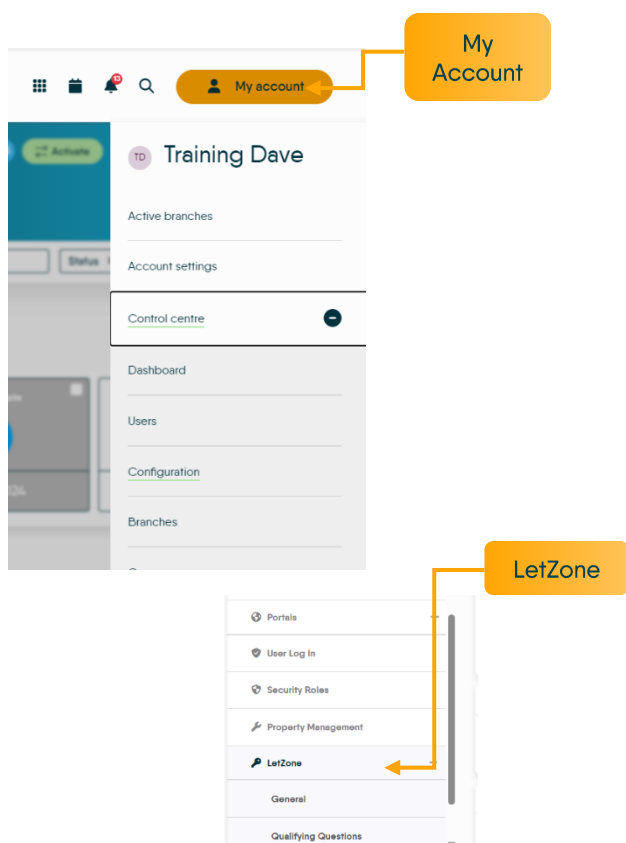
To make the Tenancy live. In the Pre-Booked Tenants tile, click on the Tenant name, this will move to the Tenant record, click on Tenancy, then in the Tenancy record in the top right corner click on Activate button or in the Three-dot-menu and click on 'Activate'

The Tenancy Application will show as 'Awaiting Move In'





# HOW TO USE LETZONE CONFIGURATION



To configure LetZone.

Click on the My Account button, click on 'Control Centre', then 'Configuration'.

Scroll down the 'Configuration' menu and click on 'LETZONE'

Within the LetZone 'General' configuration screen, the following can be setup, changed or added.

## Rightmove Referencing API Key

If Rightmove Referencing is used this is where you will add the API key supplied.

Show Risk Assessments on Tenancy Applications and Show Quality Assurance on Tenancy Applications; both these options show the results of the Risk and Quality Assessment (set on the Tenant record) on the Application.

## LetZone Payments

Allows online payments to be taken from the Tenants portal or LetZone screens.

The image shows a screenshot of the LetZone configuration screen. It is divided into two main sections: 'Letzone configuration' and 'Letzone payments'. The 'Letzone configuration' section includes a text input field for 'Rightmove referencing api key', a toggle switch for 'Show Risk Assessment on Tenancy Applications', and another toggle switch for 'Show Quality Assurance on Tenancy Applications'. The 'Letzone payments' section includes a text input field for 'Label', a text input field for 'URL', and a toggle switch for 'Letzone Card Payments Enabled'.

This option allows you to show your terms and conditions to the Tenants and have them mark to show they have read and accept them. Paste the T+C into the field, use any of the editing tools available and then enable them for use using the toggle switch.

## Quality Assurance Tiers

## LetZone Email Notification

This email can be edited to show your company logo, personalised text and contact details.

This option allows you to record a Home Visit to a Tenants current property. Default is OFF.

Once completed, remember to click 'Save'.

Home visit

Home Visit Required

Use this option if you need to visit an applicants current residence before agreeing a let

## Qualifying question

+ Add qualifying question

Field Name	Data Type	Order of Appe...	Active	Required	Enabled For G...	Enabled For Te...	
Do You Smoke	Yes/No	1	✓	✓	✓	✓	<a href="#">Edit Settings</a>
Are you currently employed?	Yes/No	1	✓	✗	✓	✓	<a href="#">Edit Settings</a>
How many people will be staying in the property, including children	Text	1	✓	✓	✓	✓	<a href="#">Edit Settings</a>
Text question	Select List	1	✓	✓	✓	✓	<a href="#">Edit Settings</a>
Do You have Pets? If yes what types	Text	1	✓	✗	✓	✓	<a href="#">Edit Settings</a>
NDIA UK Citizens - Do you have a Right to Rent Check share code? Type it here.	Text	1	✗	✗	✓	✓	<a href="#">Edit Settings</a>
Will Housing Benefit be paying part of the Rent	Yes/No	2	✓	✓	✓	✓	<a href="#">Edit Settings</a>
Qualifying Question	Text	4	✓	✓	✗	✓	<a href="#">Edit Settings</a>

### Add New Question

Data type  
Select Data Type

Active
☒

Order of appearance  
1

Required
☐

Enable for tenant
☒

Enabled for guarantor
☐

Cancel

Save

## Qualifying Questions

These are optional and are shown in the Tenants LetZone portal, in the About You section.

By default this section is empty. Click '+ Add Qualifying Question' to create questions. The questions can be anything you require and answers can be one of multiple options e.g. Text, Boolean, List select, Date etc. The questions can be enabled for either Tenant or the Guarantor (if applicable) or can be set for both. It is possible to have different questions for each category.

Answers are shown in the LetZone section of the Tenant or Guarantor Record.

**For further support contact the  
iampropertyCRM Support Team on  
01865 860 871  
crm.support@iamproperty.com**