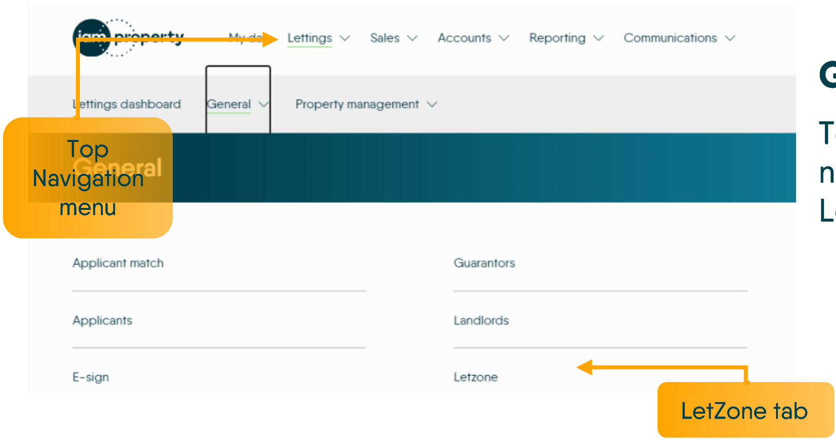
CRM HOW TO GUIDES

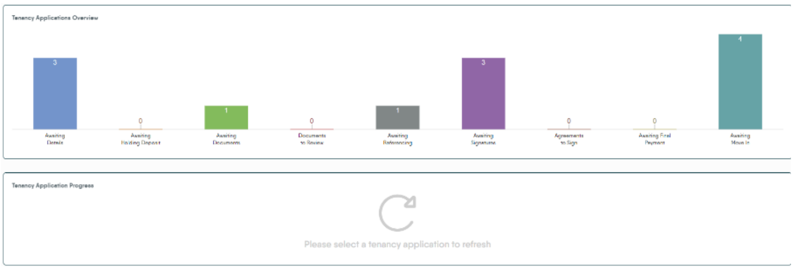
LETZONE

HOW TO USE LETZONE



Getting started

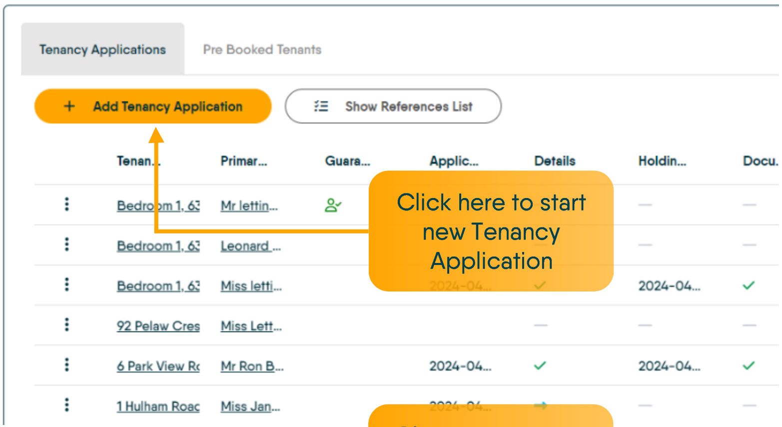
To access LetZone. In the top navigation menu Select Lettings then LetZone.



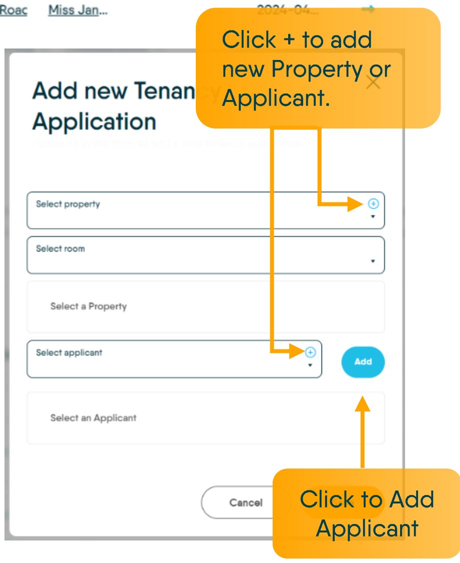
LetZone dashboard

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.

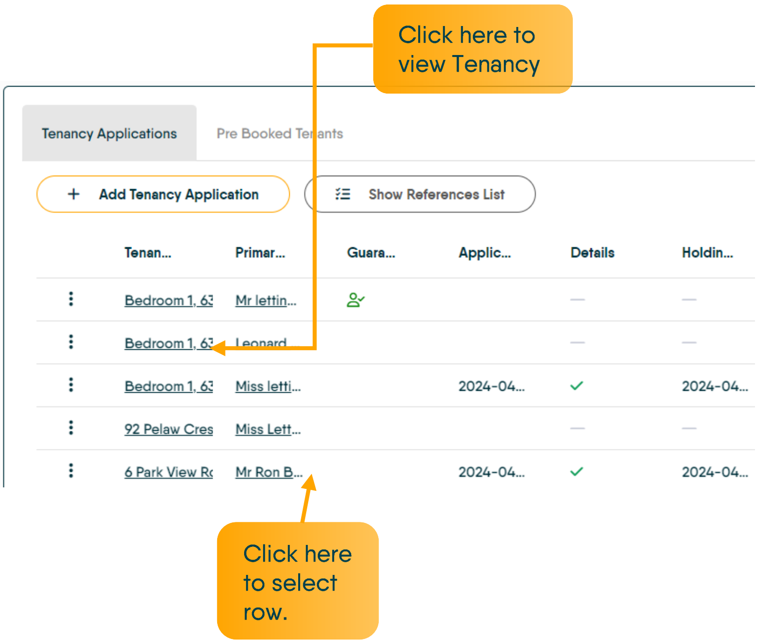


Create an Application

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.

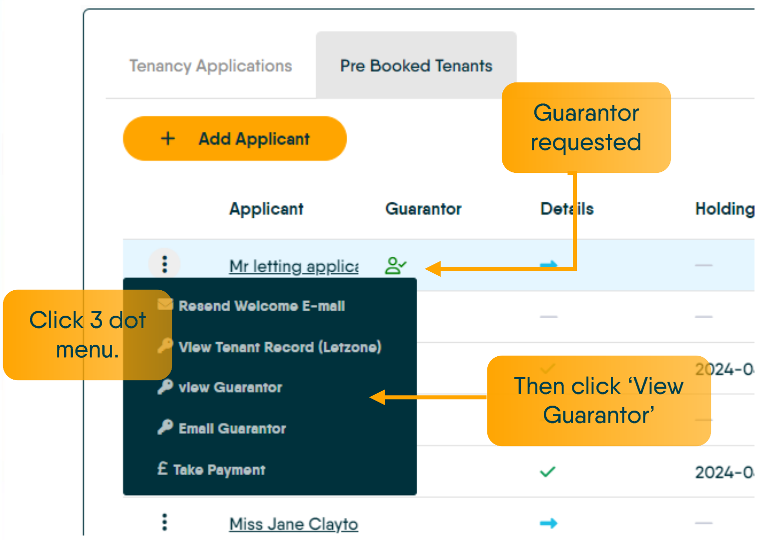
LetZone Tenancy Applications



Once added the new Application will show at the top of the 'Tenancy Applications' list, named as the Property. The Primary Tenants name will show as will an icon indicating a Guarantor has been requested. Clicking on the property address will take you to the Pre Booked Tenancy, in the name of the prospective Tenant/s.

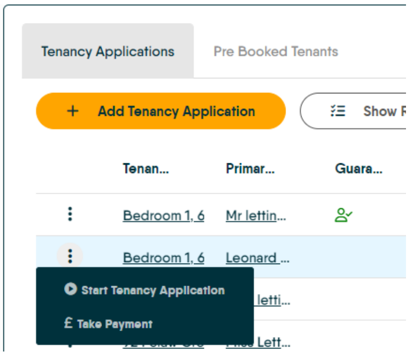
Applications created outside of LetZone will also show here, although the login details will not have been sent so need to be sent from the Pre Booked Tenant tab.

Clicking on the property information row, the process milestones will show in the box top right of the screen.



If a Guarantor has been requested and information added there will be an icon showing in the 'Guarantor' column. The Guarantor information will be accessible from the Pre booked tenants tab.

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.

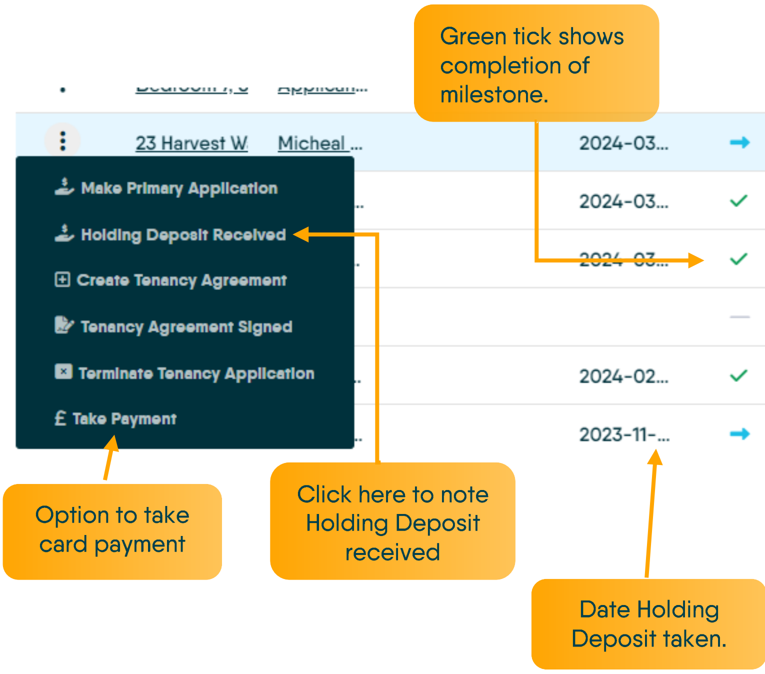
Once the Application has been created, the Applicant (Pre-Booked Tenant) will automatically receive an email, similar to this, with a username and password. Clicking on the link will take the Applicant to the LetZone Tenant portal (covered in another Guide).

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.

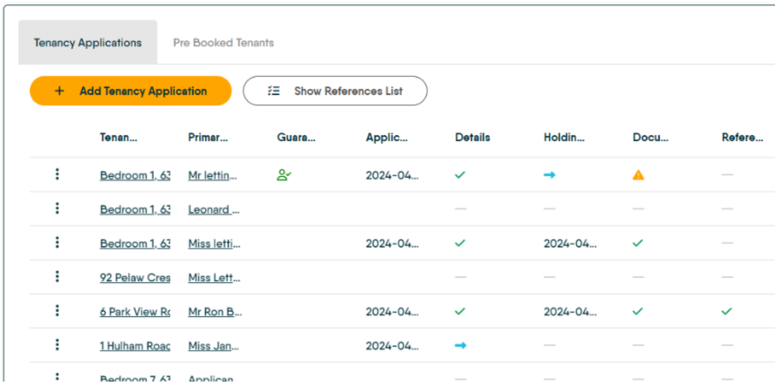


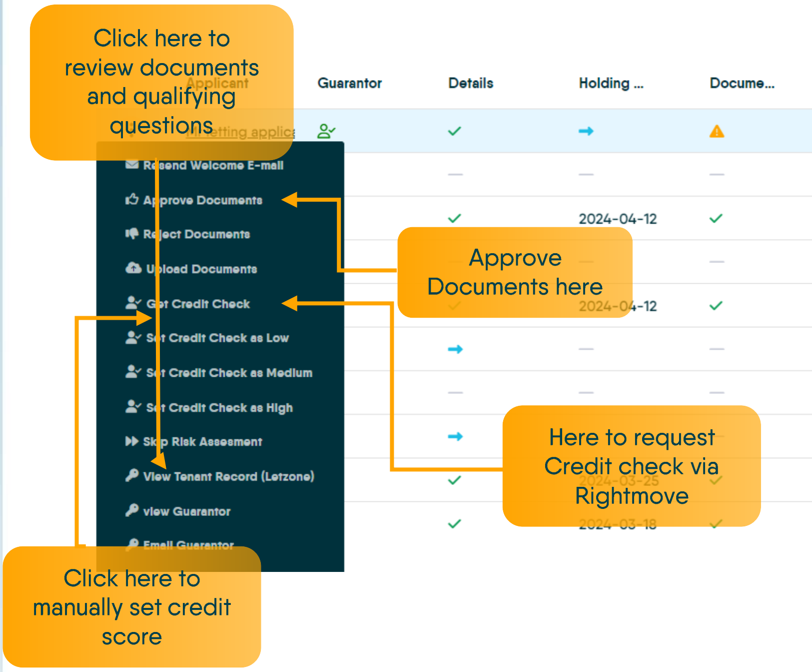
Details.

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.





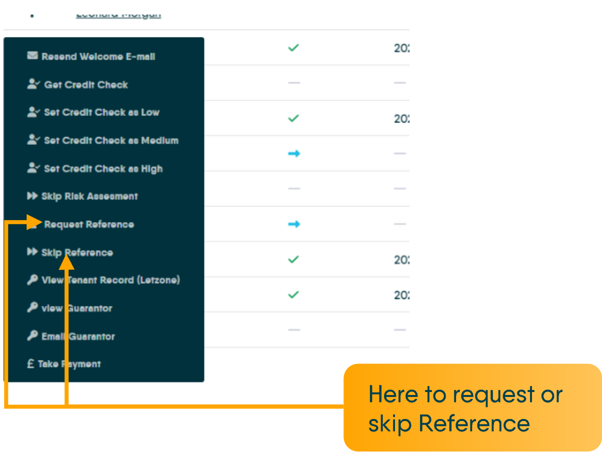
Documents

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.

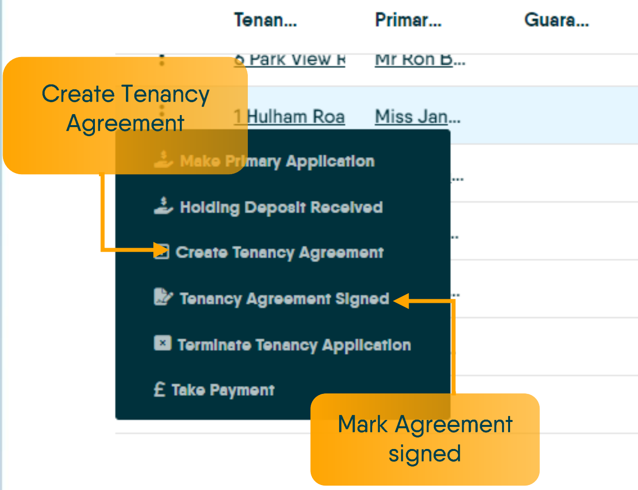
To approve or reject the documents, click on the Three-dot menu and select 'Approve' or 'Reject', once approved a green tick will show.



Risk Assesment, 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

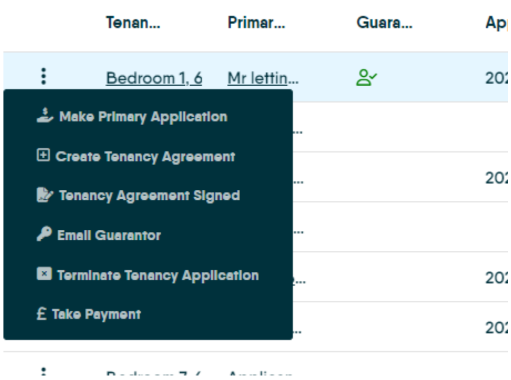
Once the Credit and Referencing checks have been passed. Create the Tenancy Agreement by clicking on the Three-dot menu and selecting 'Create Tenancy Agreement'.

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.

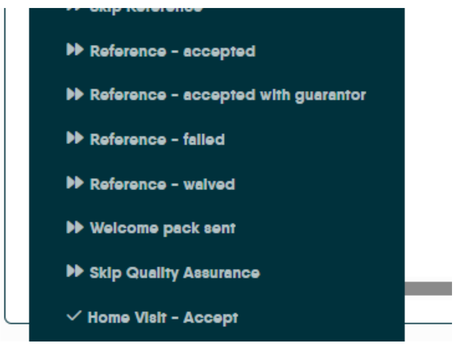
Final Steps

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

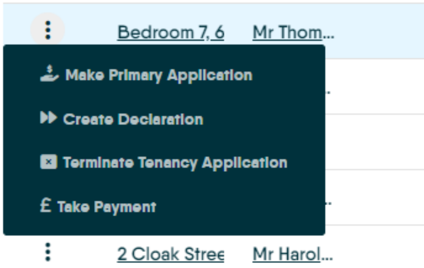
Once you know the final payment has been made, click on the Three-dot-menu in the Tenancy Application tab and click on 'Collected Final Payment' this will mark the milestone as completed.



Welcome Pack

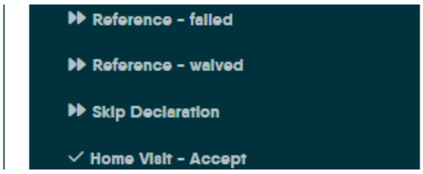
'Welcome Pack Sent' is simply for making a record of whether the agent has sent a welcome pack containing legally required information. Once sent, from the Tenancy Applications tab click on the property address, then click on the Three-dot menu and select 'Welcome Pack Sent' to mark this milestone completed.

Declaration



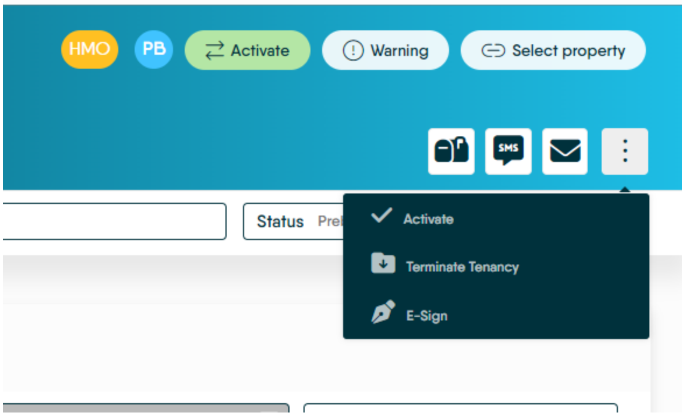
This is an optional item, that can be skipped. The declaration can be used as you wish, an example would be to have Tenant sign off to say they have received all the prescribed information.

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.

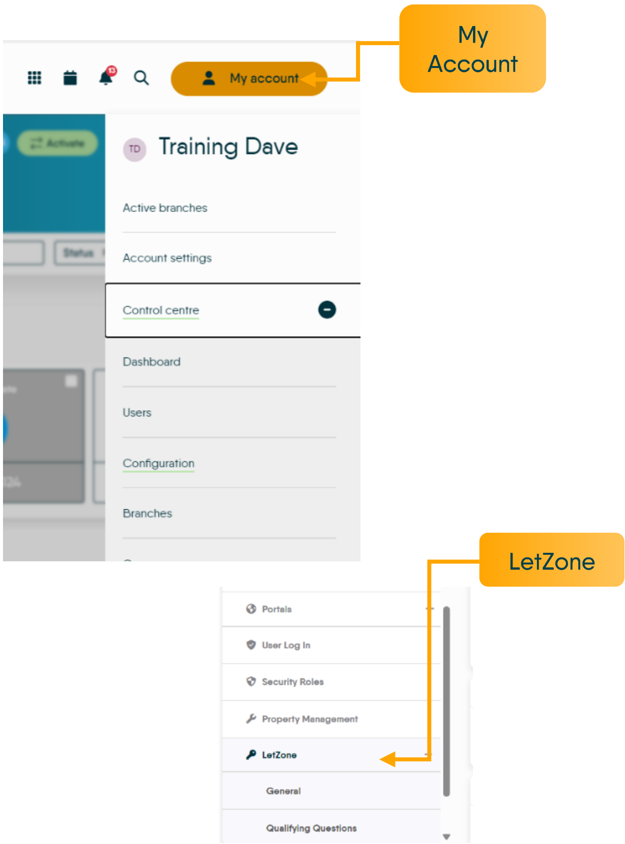
Move In



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

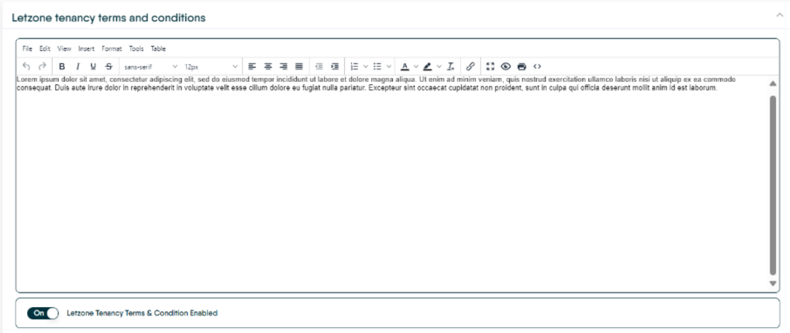
If Rightmove Referencing is used this is where you will add the API key supplied.

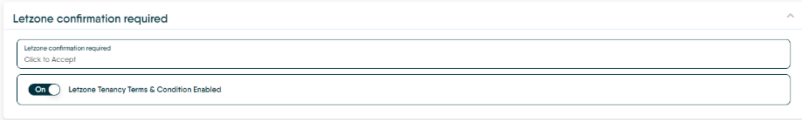
Show Risk Assessments on Tenancy Applications and Show Quality Assurance on Tenancy Applications; both these options show the results of the Risk and Quality Assessment (set on the Tenant record) on the Application.

LetZone Payments

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

LetZone tenancy terms and conditions

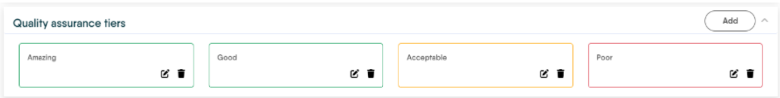




This option allows you to show your terms and conditions to the Tenants and have them mark to show they have read and accept them. Paste the T+C into the field, use any of the editing tools available and then enable them for use using the toggle switch.

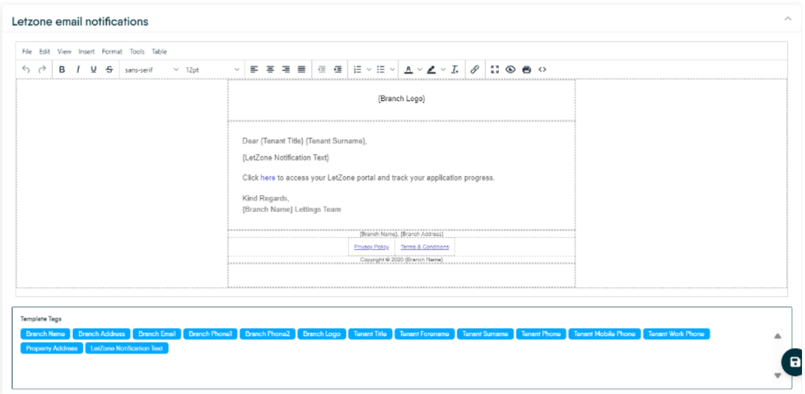
The next field allows you to have an option where the Tenant can mark to show they have read and accept the T+C, the tenant selecting this option will place a copy of the T+C accepted into the 'Documents' folder for the Tenants record. If the Tenant does not accept the T+C the Negotiator will see an information message showing this each time the access the Tenant record

Quality Assurance Tiers



This is optional. Tiers can be set here if required.

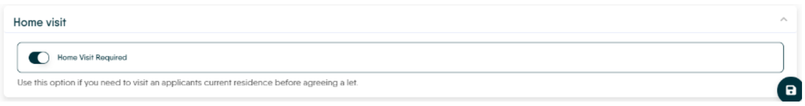
LetZone Email Notification



This is the email that is sent to new users of LetZone with their username and password.

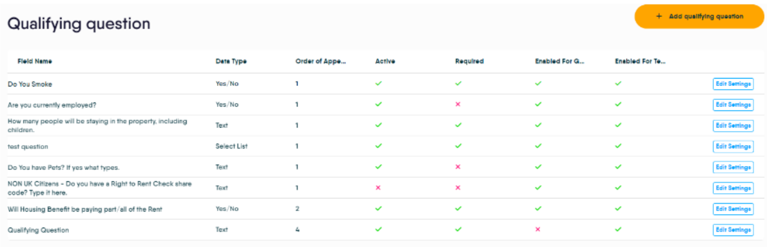
This email can be edited to show your company logo, personalised text and contact details.

Home Visit

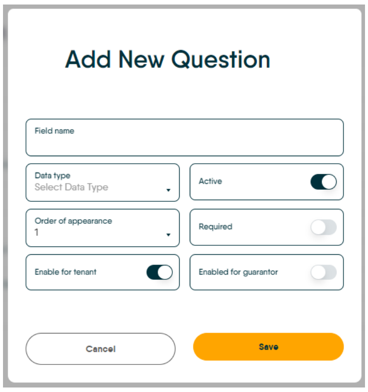


This option allows you to record a Home Visit to a Tenants current property. Default is OFF.

Once completed, remember to click 'Save'.



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



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