Configuring LetZone Settings

This guide offers a step-by-step approach to configuring Letzone settings effectively, which is essential for optimising prebooked lettings workflows.

By following these instructions, users can enhance their operational efficiency, ensure compliance with tenancy terms, and improve communication with tenants through tailored notifications.

1 Navigate to **https://crm.iamproperty.com/MyDay**

2 Click "My account"
Click "Control centre"
Click "Configuration"

property   My day   Lettings ∨   Sales ∨   Accounts ∨   Reporting ∨   Communications ∨   My account

lcome back, Training

d New Record   📋 View property management   ⑦ Visit help centre

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ay's events

	Name
	Test test

✓ My tasks

	Status	Name	Priority	Start date	Due date
⋮	▢ Not Started	Contact Landlord re renewal	⚠ High	12/Jun/2025	14/Jun/2025
⋮	▢ Not Started	Call back	⚠ High	03/Jan/2025	03/Jan/2025
⋮	▢ Not Started	Make Tea	⚠ High	07/Jan/2025	07/Jan/2025

TD   **Training Dave**

Active branches

Account settings

Control centre   ⊕

Help centre

Log out

3   Click "Letzone"

✉ SMTP	
💬 SMS	
📖 Letters	
✏ E-Sign	
🌐 Portals	+
🛡 User Log In	
🛡 Security Roles	
🔧 Property Management	
📑 Referencing Checks (By Vision+)	
🔑 LetZone	+
🏠 Lettings	
📅 Calendar Integration	

Third Party

Allow Marketing

Applicant matching defaults

Matching Area

Landlord portal

Restrict Landlord Portal

My day defaults

Only Show Due Or Overdue Tasks

Compliance checks

Portal feed compliance control

4 Click "General". The main Configuration settings for Letzone are in here.

5 Click "Letzone Configuration" If you use Rightmove to reference your clients, add Rightmove.

From this screen you can set the system to show Risk Assessments and Quality Assurance settings. These are both optional, Quality Assurance is set from the Additional Information section of the Tenant Record. Risk Assessments are set in the Letzone module.

6 Click "Letzone Payments" allows you to setup Letzone to take Card payments

SMTP

SMS

Letters

E-Sign

Portals +

User Log In

Security Roles

Property Management

Referencing Checks (By Vision+)

LetZone −

General

Qualifying Questions

Letzone

Letzone configuration

Rightmove referencing API Key
Enter your Rightmove referencing API Key

Show Risk Assessment on Tenancy Applications

Show Quality Assurance on Tenancy Applications

Letzone payments

Label
Take Payment

URL
www.payment-provider-URL.com

Letzone Card Payments Enabled

Letzone tenancy terms and conditions

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7 Click "Letzone Tenancy Terms And Conditions" in this section you can add your letting terms and conditions to be viewed by the tenant

property   My day   Lettings ⌄   Sales ⌄   Accounts ⌄   Reporting ⌄   Communications ⌄   My account

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Letzone tenancy terms and conditions

File   Edit   View   Insert   Format   Tools   Table

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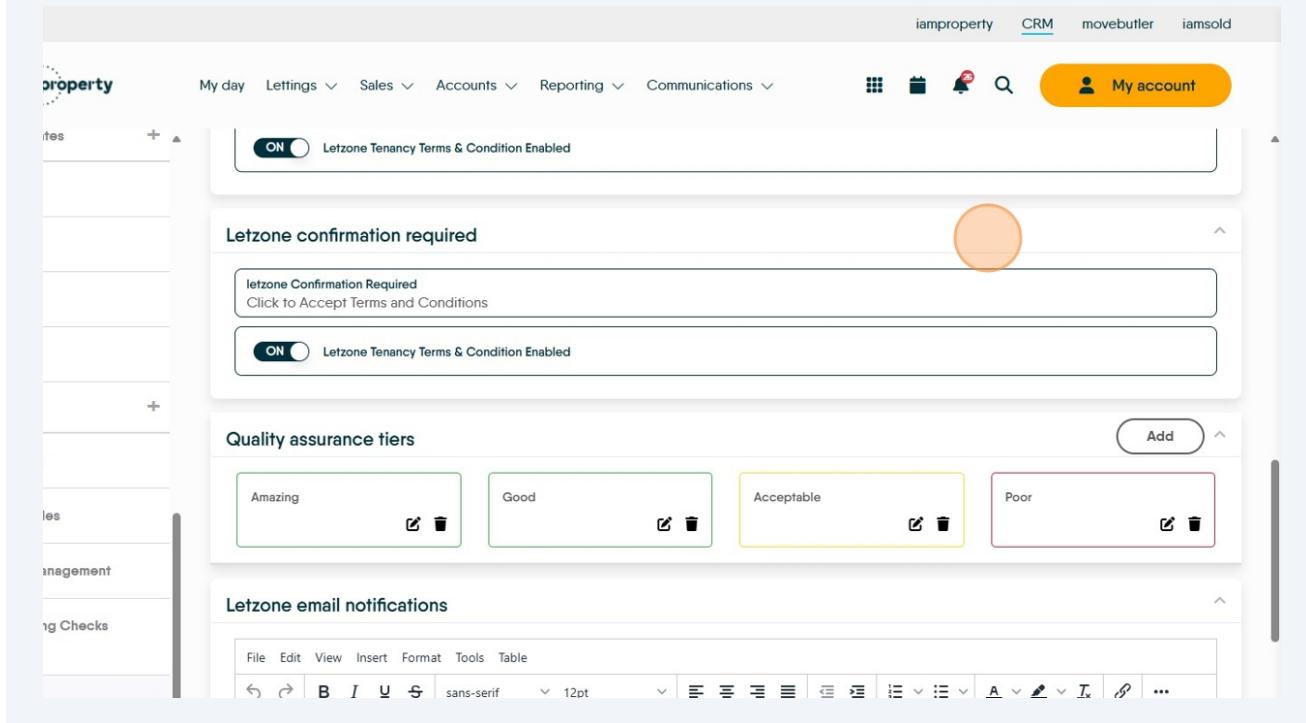
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ON   Letzone Tenancy Terms & Condition Enabled

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Click "Letzone Confirmation Required" to enable a checkbox in the Letzone portal for the tenant to mark that they have read and accept the terms and conditions.
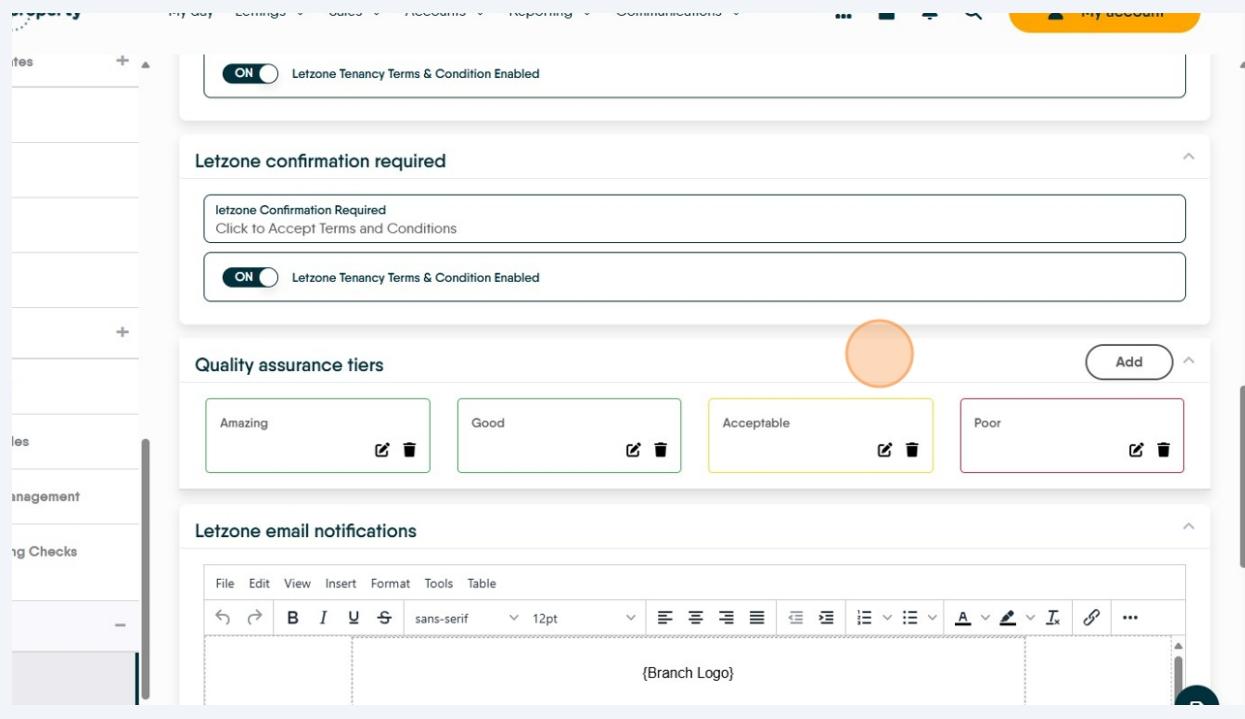
If this is set and the tenant does not click the check box a notification will show whenever you access the Tenant record to remind that they have not accepted the T&Cs
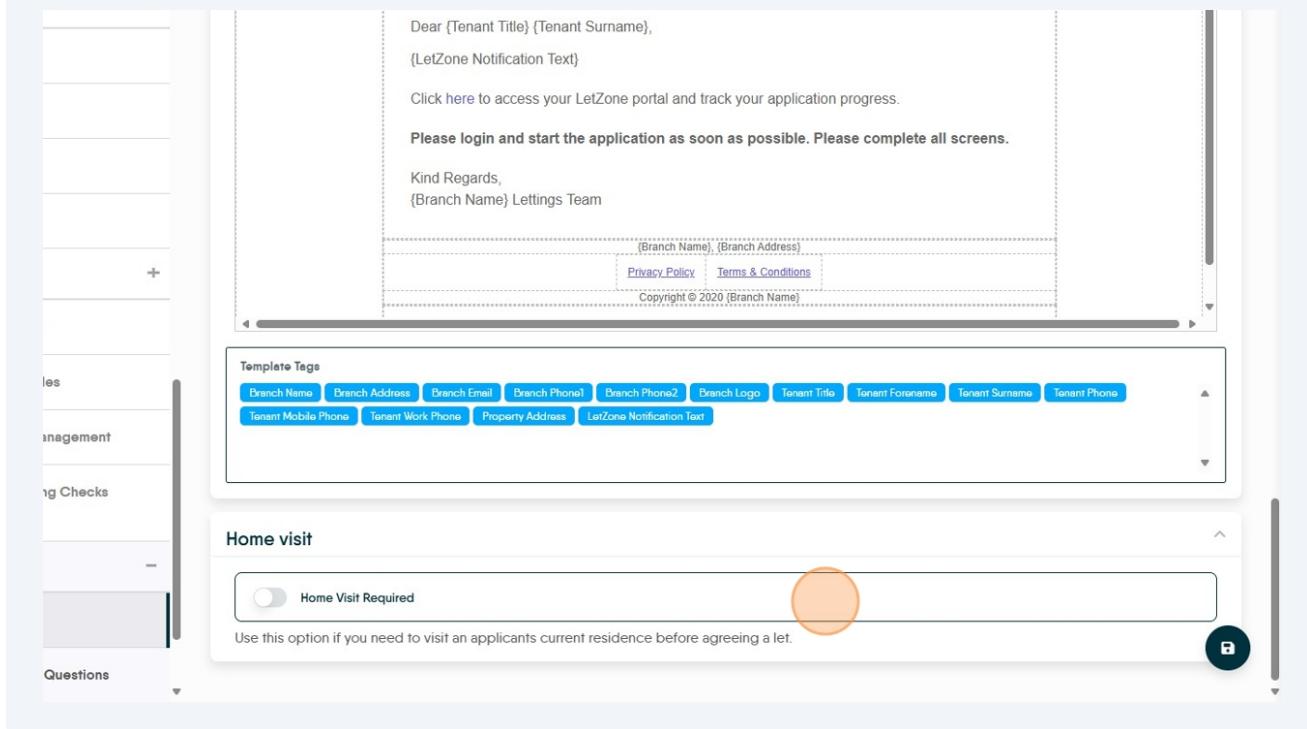
9 Click "Quality assurance tiers" to set these if you use this option.

10 Click "Letzone Email Notifications" this is the email that is sent out to the tenants to invite them to use the Portal.

11 If you make home visits prior to the acceptance of a new tenancy this option will allow the outcome of these to be recorded in Letzone. Click "Home Visit Required"

Dear {Tenant Title} {Tenant Surname},

{LetZone Notification Text}

Click here to access your LetZone portal and track your application progress.

Please login and start the application as soon as possible. Please complete all screens.

Kind Regards,
{Branch Name} Lettings Team

{Branch Name}, {Branch Address}
Privacy Policy   Terms & Conditions
Copyright © 2020 {Branch Name}

Template Tags

Branch Name | Branch Address | Branch Email | Branch Phone1 | Branch Phone2 | Branch Logo | Tenant Title | Tenant Forename | Tenant Surname | Tenant Phone
Tenant Mobile Phone | Tenant Work Phone | Property Address | LetZone Notification Text

Home visit

Home Visit Required

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

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Questions

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12 Click here to save the updated information

Dear {Tenant Title} {Tenant Surname},

{LetZone Notification Text}

Click here to access your LetZone portal and track your application progress.

Please login and start the application as soon as possible. Please complete all screens.

Kind Regards,
{Branch Name} Lettings Team

{Branch Name}, {Branch Address}
Privacy Policy   Terms & Conditions
Copyright © 2020 {Branch Name}

Template Tags

Branch Name | Branch Address | Branch Email | Branch Phone1 | Branch Phone2 | Branch Logo | Tenant Title | Tenant Forename | Tenant Surname | Tenant Phone
Tenant Mobile Phone | Tenant Work Phone | Property Address | LetZone Notification Text
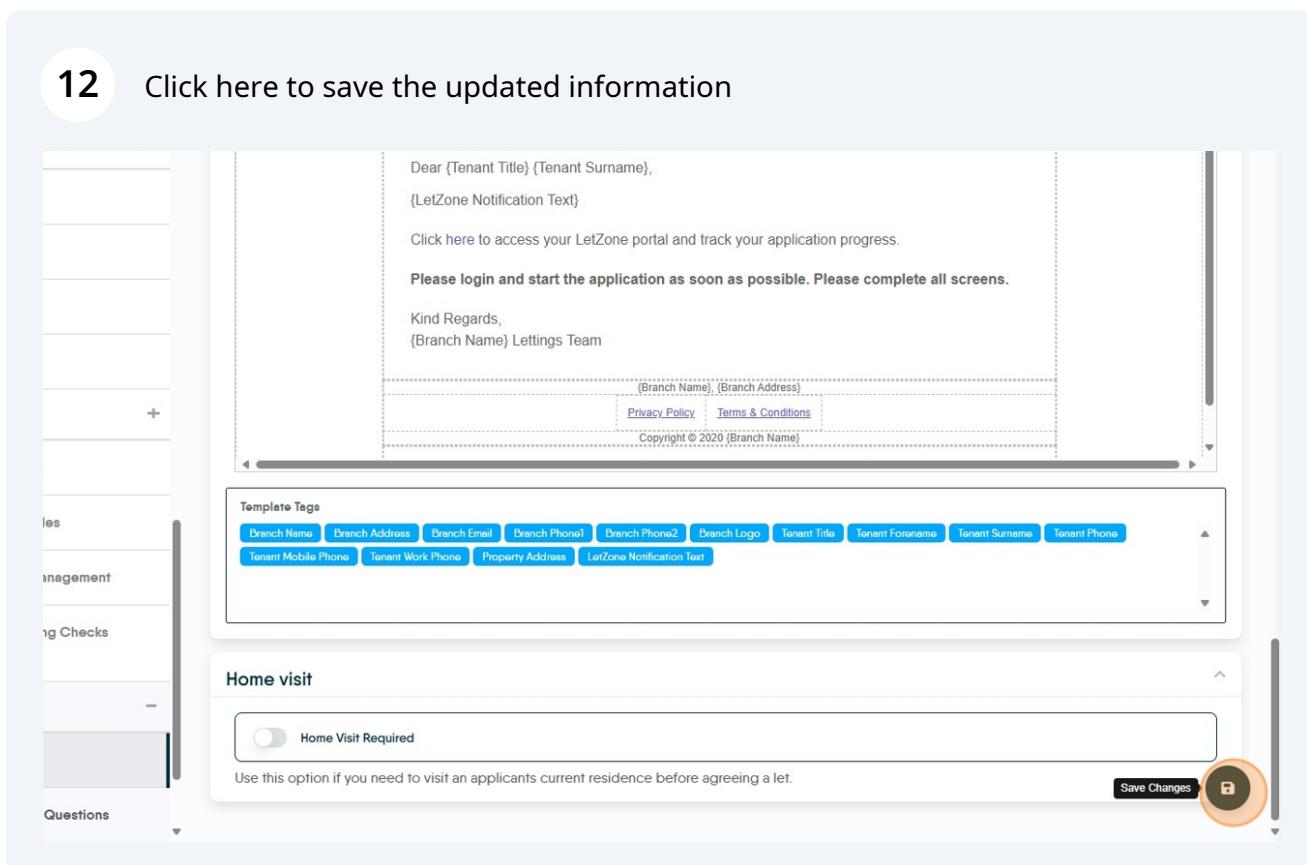
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Save Changes

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Questions