

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>

The screenshot shows the 'My Day' dashboard of the iam property CRM. At the top, there is a navigation bar with links: 'My day', 'Lettings', 'Sales', 'Accounts', 'Reporting', 'Communications', and a 'My account' button. Below the navigation bar, a large green header says 'Welcome back, Training'. Underneath the header, there are three buttons: '+ Add New Record', 'View property management', and 'Visit help centre'. A search bar with the placeholder 'Search all records' is also present. The main content area is divided into two sections: 'Today's events' and 'My tasks'. The 'Today's events' section shows a single event: '12:00 Test test'. The 'My tasks' section shows a list of four 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
...	Not Started	Clean Windows	High	28/Jan/2025	28/Jan/2025

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

My day Lettings Sales Accounts Reporting Communications

My account

Income back, Training

New Record View property management Visit help centre

Records

My 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

My day Lettings Sales Accounts Reporting Communications

My account

Income back, Training

New Record View property management Visit help centre

Records

My events

Name
Test test

My tasks

Status	Name	Priority
Not Started	Contact Landlord re renewal	High
Not Started	Call back	High
Not Started	Make Tea	High

TD Training Dave

Active branches

Account settings

Control centre

Help centre

Log out

lcome back, Training

New Record View property management Visit help centre

records

Name	Status	Name	Priority
Test test	Not Started	Contact Landlord re renewal	High
	Not Started	Call back	High
	Not Started	Make Tea	High
	Not Started	Clean Windows	High
	Not Started	making tea	High

TD Training Dave

Active branches

Account settings

Control centre

Dashboard

Users

Configuration

Branches

Company

Property Management Settings

Help centre

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

Matching Area

Landlord portal

Restrict Landlord Portal

Only Show Due Or Overdue Tasks

Portal feed compliance control

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

SMTP

SMS

Letters

E-Sign

Portals

User Log In

Security Roles

Property Management

Referencing Checks (By Vision+)

LetZone

General

Qualifying Questions

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

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.

My day

Settings

Sales

Accounts

Reporting

Communications

Control Centre > Configuration >

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

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

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

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

Letzone tenancy terms and conditions

File Edit View Insert Format Tools Table

Font: B I U S sans-serif Size: 12px

Text area content (three paragraphs of placeholder text):

1. Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua. Ut enim ad minim veniam, quis nostrud exercitation ullamco laboris nisi ut aliquip ex ea commodo consequat. Duis aute irure dolor in reprehenderit in voluptate velit esse cillum dolore eu fugiat nulla pariatur. Excepteur sint occaecat cupidatat non proident, sunt in culpa qui officia deserunt mollit anim id est laborum.

2. Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua. Ut enim ad minim veniam, quis nostrud exercitation ullamco laboris nisi ut aliquip ex ea commodo consequat. Duis aute irure dolor in reprehenderit in voluptate velit esse cillum dolore eu fugiat nulla pariatur. Excepteur sint occaecat cupidatat non proident, sunt in culpa qui officia deserunt mollit anim id est laborum.

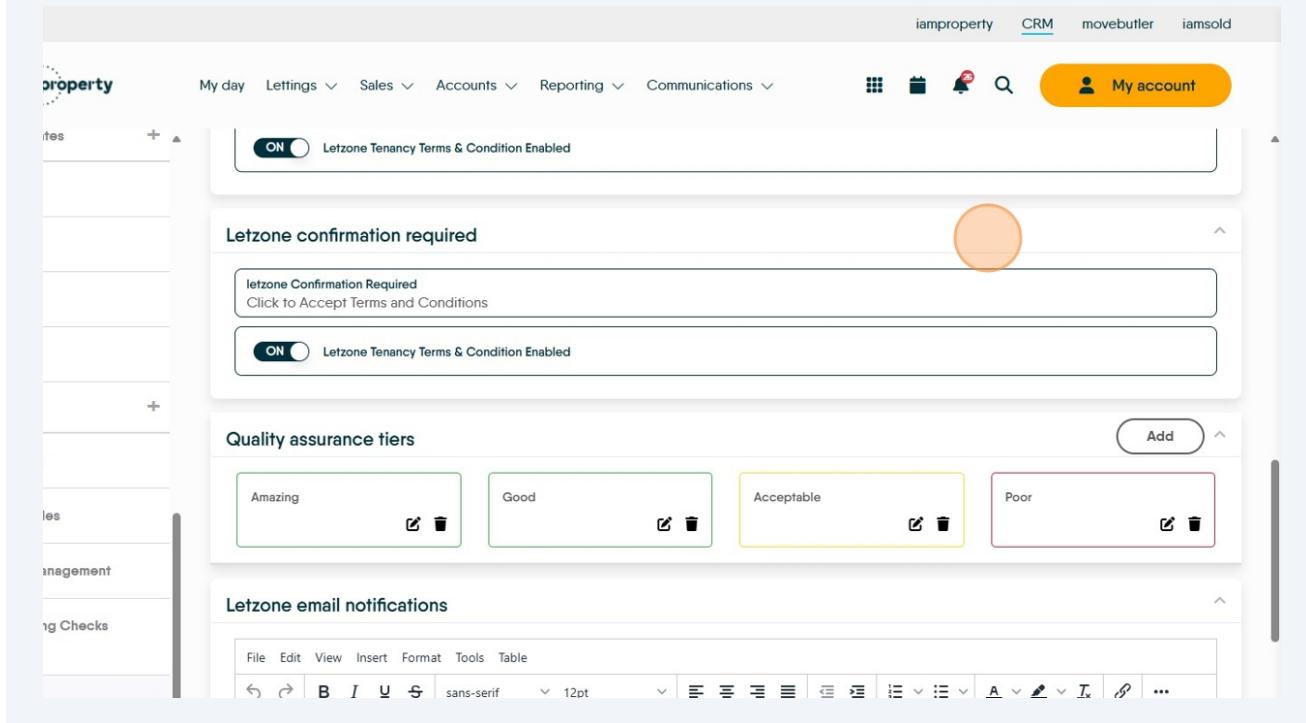
3. Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua. Ut enim ad minim veniam, quis nostrud exercitation ullamco laboris nisi ut aliquip ex ea commodo consequat. Duis aute irure dolor in reprehenderit in voluptate velit esse cillum dolore eu fugiat nulla pariatur. Excepteur sint occaecat cupidatat non proident, sunt in culpa qui officia deserunt mollit anim id est laborum.

ON Letzone Tenancy Terms & Condition Enabled

8

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.

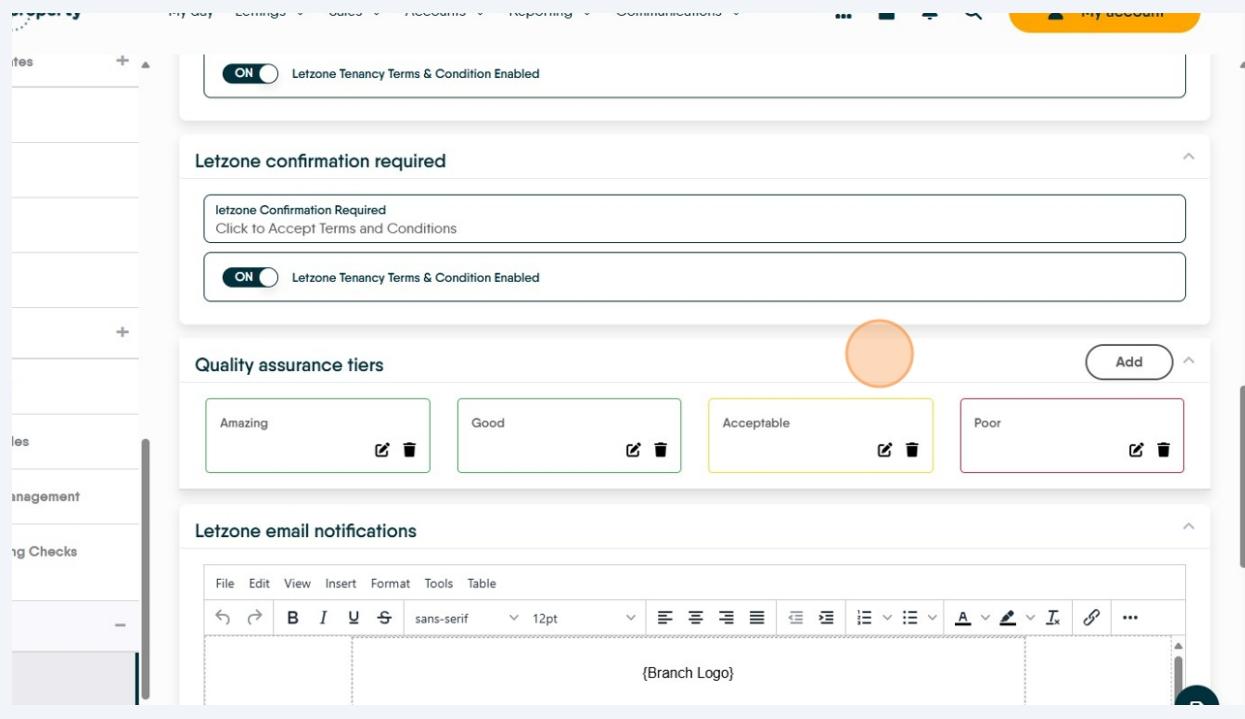
If this is set and the tenant does not click the check box a notification will show whenever you access the Tenant record to remind that they have not accepted the T&Cs



The screenshot shows the iamsold CRM software interface. At the top, there are navigation links: 'My day', 'Lettings', 'Sales', 'Accounts', 'Reporting', 'Communications', 'CRM' (which is underlined), 'movebutler', and 'iamsold'. On the far right, there are icons for 'My account' (a user profile), a search bar, and a notification bell. The main content area is titled 'Letzone confirmation required'. It contains a sub-section with the text 'Letzone Confirmation Required' and 'Click to Accept Terms and Conditions'. Below this is another 'ON' toggle switch labeled 'Letzone Tenancy Terms & Condition Enabled'. Further down, there is a section titled 'Quality assurance tiers' with four categories: 'Amazing' (green box), 'Good' (green box), 'Acceptable' (yellow box), and 'Poor' (red box). Each category has a small trash can icon. At the bottom, there is a 'Letzone email notifications' section with a rich text editor toolbar. The toolbar includes standard file operations (File, Edit, View, Insert, Format, Tools, Table), text styling (Bold, Italic, Underline, Strike), font selection (sans-serif), font size (12pt), and alignment (Left, Center, Right, Justify, Justify All, Justify Last, Justify First). The toolbar also includes icons for italic, underline, strike, and other document functions.

9

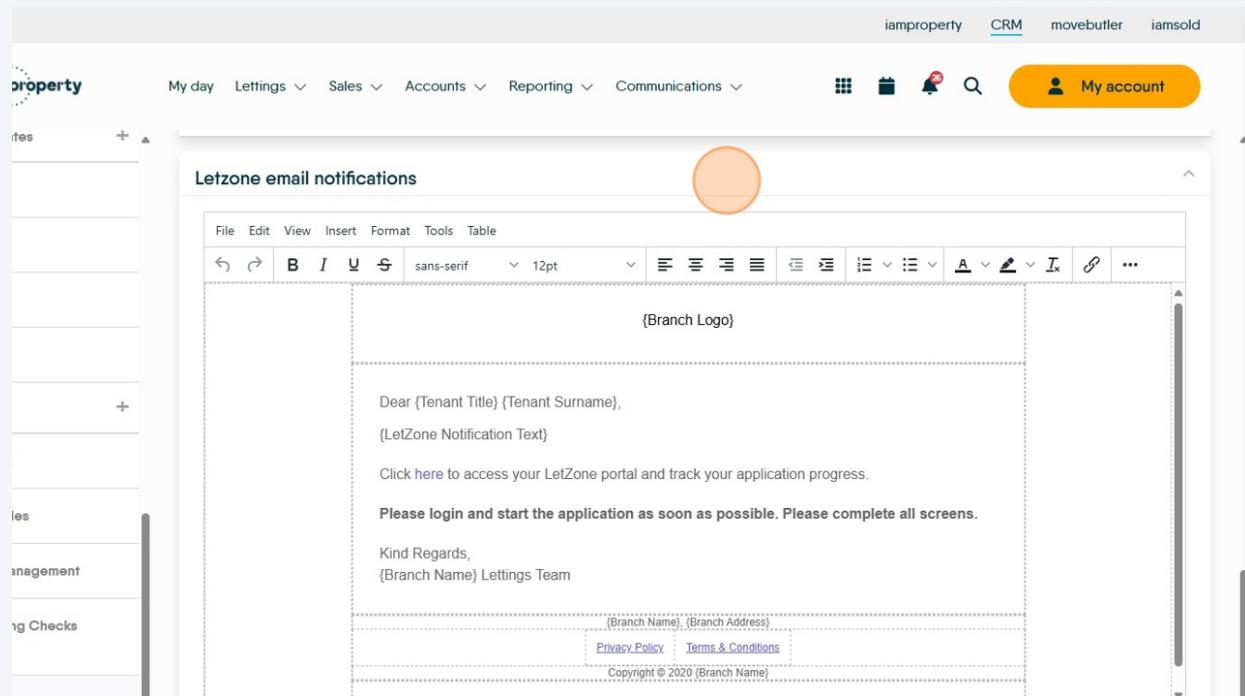
Click "Quality assurance tiers" to set these if you use this option.



The screenshot shows the Letzone software interface. At the top, there is a navigation bar with various tabs: My day, Lettings, Sales, Accounts, Reporting, Communications, and a yellow 'My account' button. Below the navigation bar, there is a section titled 'Letzone confirmation required' with a sub-section 'Letzone Confirmation Required' containing a note 'Click to Accept Terms and Conditions' and an 'ON' toggle switch labeled 'Letzone Tenancy Terms & Condition Enabled'. Below this, there is a section titled 'Quality assurance tiers' with four colored boxes: 'Amazing' (green), 'Good' (green), 'Acceptable' (yellow), and 'Poor' (red). Each box has a small orange circular icon above it and edit/delete icons below. To the right of the 'Acceptable' box is an 'Add' button. At the bottom, there is a section titled 'Letzone email notifications' with a rich text editor toolbar and a preview area containing placeholder text: '{Branch Logo}' and 'Dear {Tenant Title} {Tenant Surname}, {LetZone Notification Text}'.

10

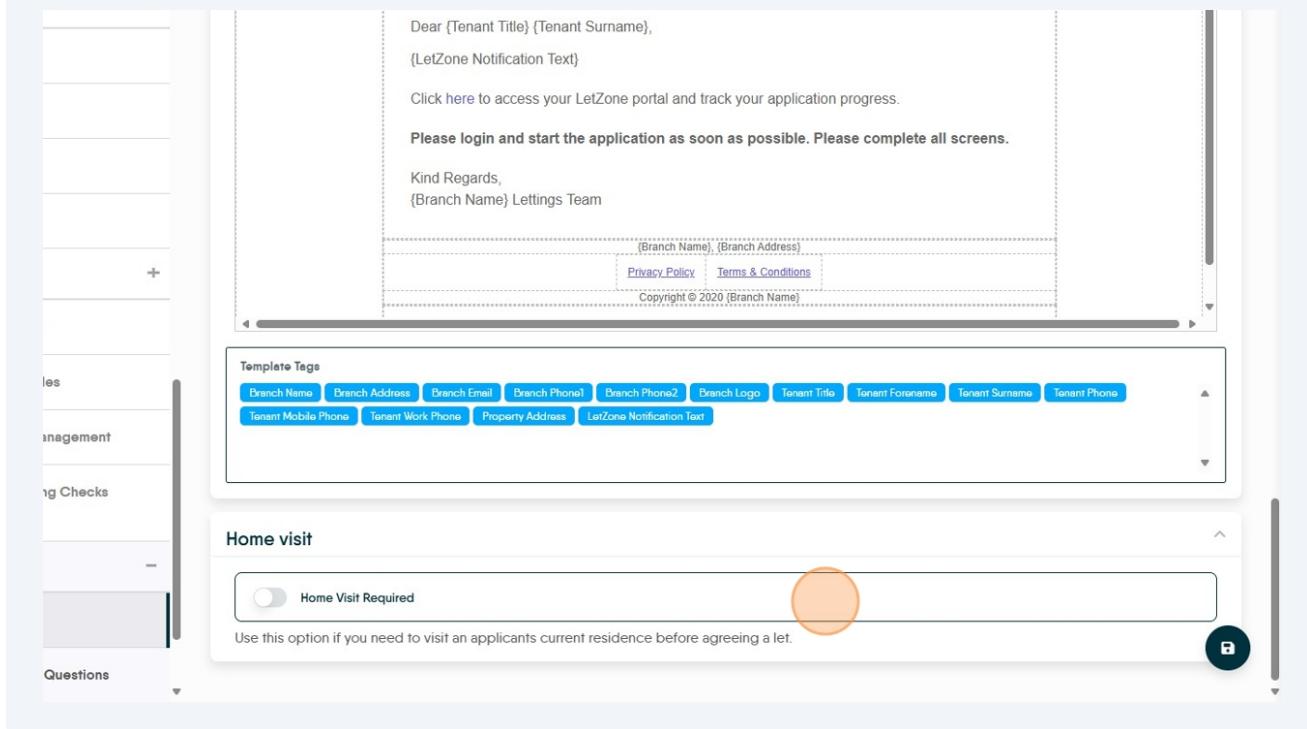
Click "Letzone Email Notifications" this is the email that is sent out to the tenants to invite them to use the Portal.



The screenshot shows the Letzone software interface. At the top, there is a navigation bar with various tabs: My day, Lettings, Sales, Accounts, Reporting, Communications, and a yellow 'My account' button. Below the navigation bar, there is a section titled 'Letzone email notifications' with a rich text editor toolbar and a preview area containing placeholder text: '{Branch Logo}' and 'Dear {Tenant Title} {Tenant Surname}, {LetZone Notification Text}'. Below this, there is a note: 'Click here to access your LetZone portal and track your application progress.' and 'Please login and start the application as soon as possible. Please complete all screens.' At the bottom, there is a note: 'Kind Regards, {Branch Name} Lettings Team' and a footer with links: '(Branch Name)', '(Branch Address)', 'Privacy Policy', 'Terms & Conditions', and 'Copyright © 2020 {Branch Name}'.

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

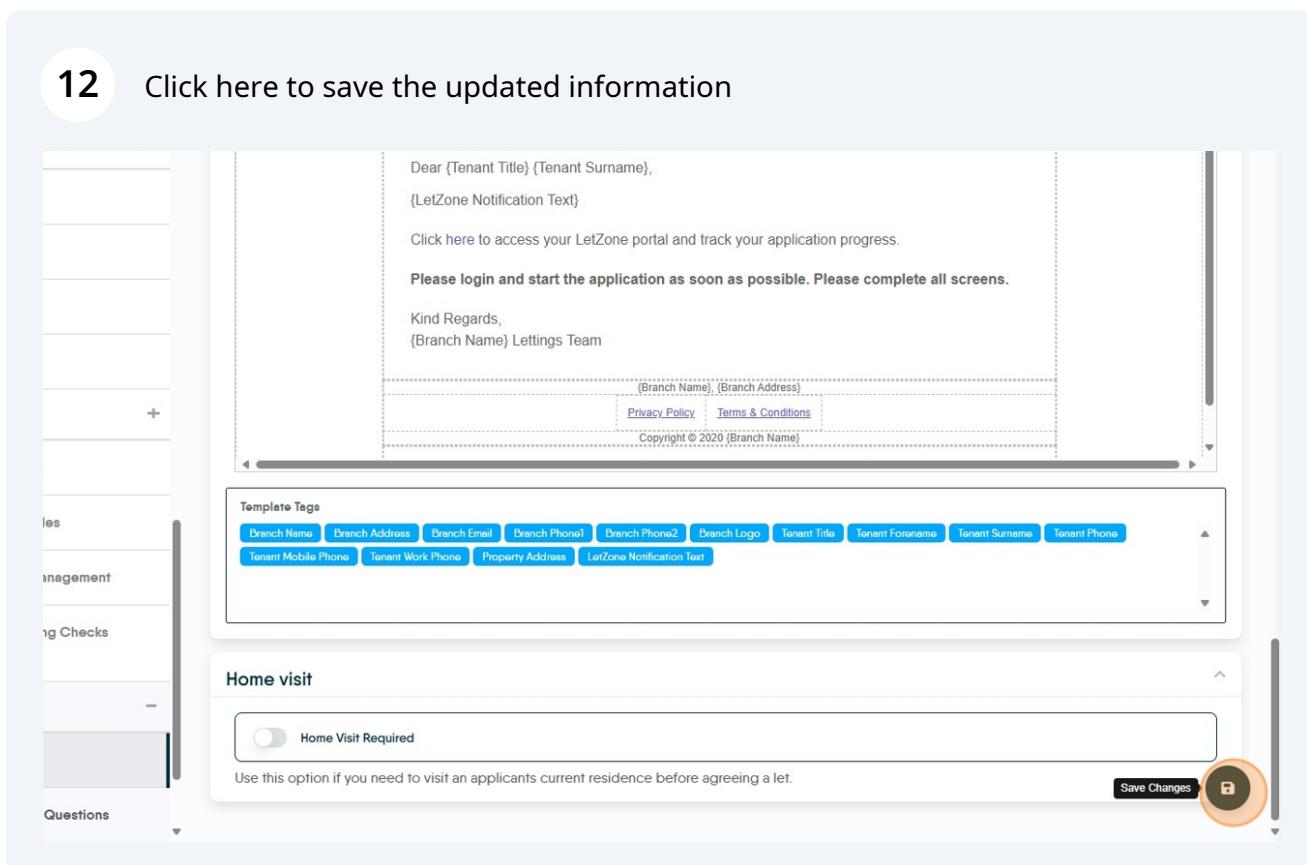
Home visit

Home Visit Required

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

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

Home visit

Home Visit Required

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

Save Changes