

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 displays the 'MyDay' dashboard of the iamproperty CRM. At the top, there's a navigation bar with links for 'My day', 'Lettings', 'Sales', 'Accounts', 'Reporting', and 'Communications', along with a user profile icon labeled 'My account'. Below the navigation bar, a large heading says 'Welcome back, Training'. Underneath, there are three buttons: '+ Add New Record' (orange), 'View property management' (blue), and 'Visit help centre' (blue). A search bar labeled 'Search all records' is positioned below these buttons. The main content area is divided into two panels. The left panel, titled 'Today's events', shows a table with two columns: 'Time' and 'Name'. It lists one event at '12:00' with the name 'Test test'. The right panel, titled 'My tasks', shows a table with columns: 'Status', 'Name', 'Priority', 'Start date', and 'Due date'. It lists four tasks, all with a status of 'Not Started' and a priority of 'High': 'Contact Landlord re renewal' (due 14/Jun/2025), 'Call back' (due 03/Jan/2025), 'Make Tea' (due 07/Jan/2025), and 'Clean Windows' (due 28/Jan/2025).

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"

iampropertyCRMmovebutleriamsold

property

My dayLettingsSalesAccountsReportingCommunications

My account

Icome back, Training

New Record

View property management

Visit help centre

Records

My'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

iampropertyCRMmovebutleriamsold

property

My dayLettingsSalesAccountsReportingCommunications

My account

Icome back, Training

New Record

View property management

Visit help centre

Records

My's 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

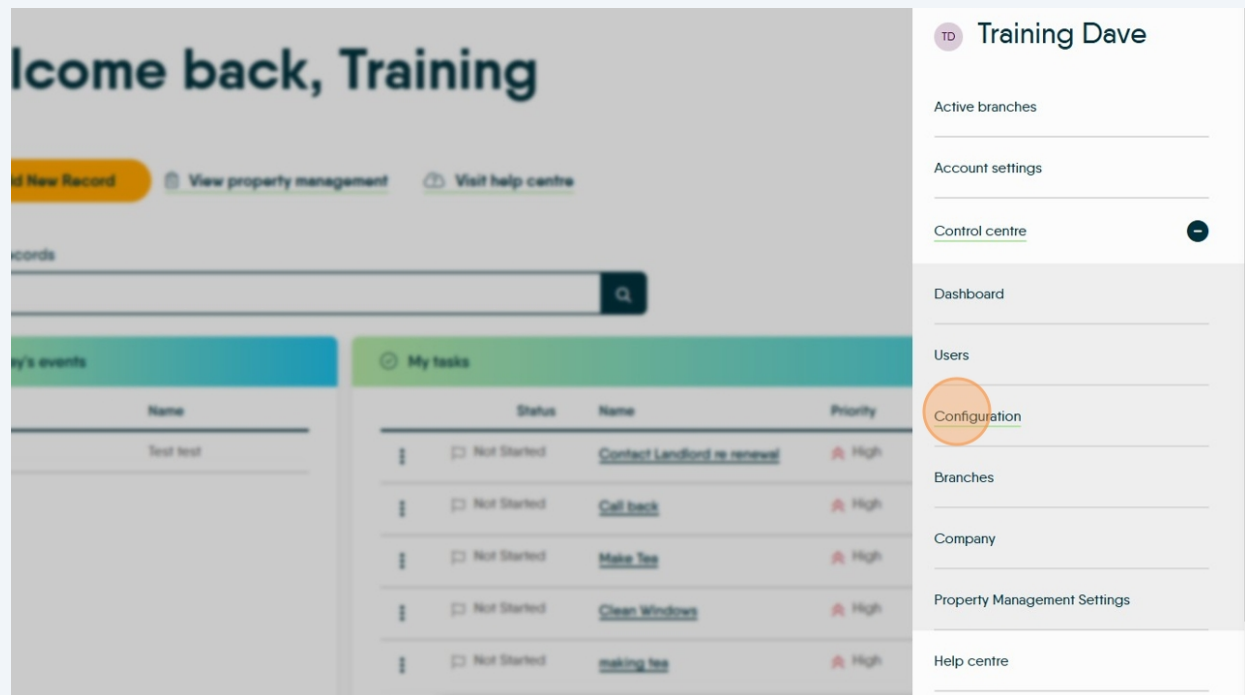
Account settings

Control centre

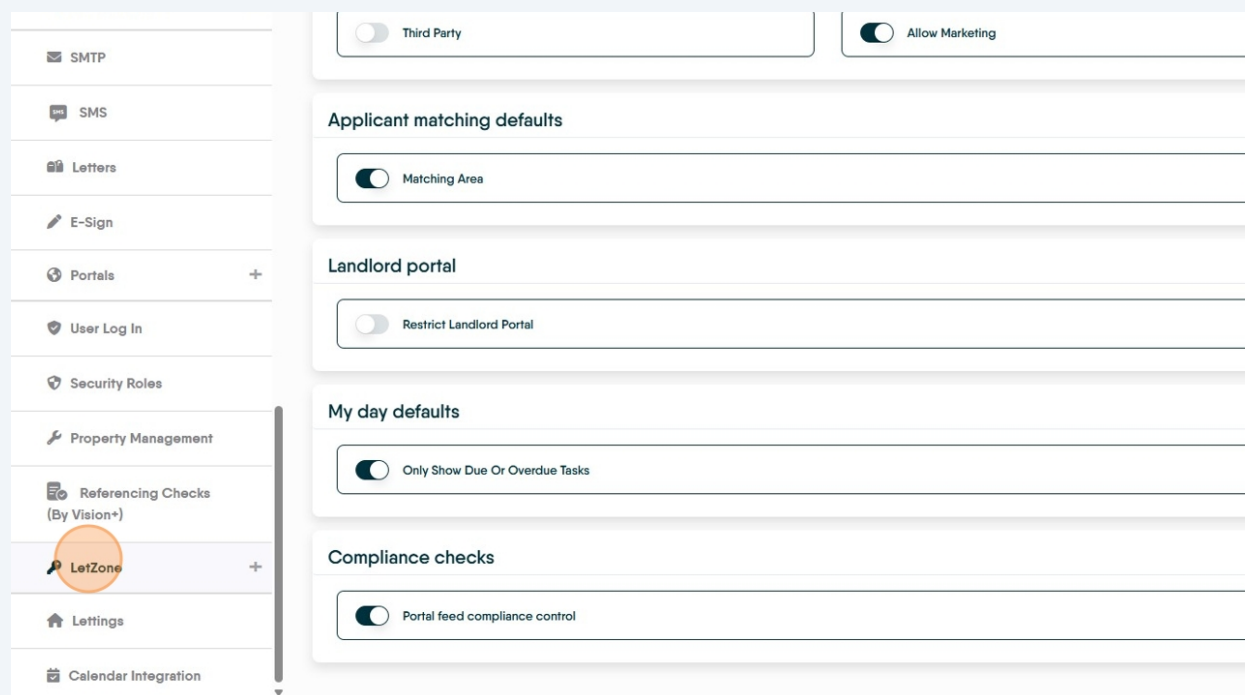
Help centre

Log out

2



3 Click "Letzone"



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

The screenshot shows the 'General' configuration page. On the left is a sidebar menu with options: SMTP, SMS, Letters, E-Sign, Portals, User Log In, Security Roles, Property Management, Referencing Checks (By Vision+), LetZone (highlighted), General (circled in orange), and Qualifying Questions. The main content area contains several toggle switches: 'Third Party' and 'Allow Marketing' at the top; 'Applicant matching defaults' with a 'Matching Area' toggle; 'Landlord portal' with a 'Restrict Landlord Portal' toggle; 'My day defaults' with an 'Only Show Due Or Overdue Tasks' toggle; and 'Compliance checks' with a 'Portal feed compliance control' toggle.

- 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.

The screenshot shows the 'Letzone configuration' page. The top navigation bar includes 'iamproperty', 'CRM', and 'movebutle'. Below it is a menu with 'My day', 'Lettings', 'Sales', 'Accounts', 'Reporting', and 'Communications'. The left sidebar menu is the same as in the previous screenshot, with 'LetZone' highlighted. The main content area is titled 'Letzone' and contains a 'Letzone configuration' section with a text input for 'Rightmove referencing API Key' (labeled 'Enter your Rightmove referencing API Key') and two toggle switches: 'Show Risk Assessment on Tenancy Applications' and 'Show Quality Assurance on Tenancy Applications'. Below this is a 'Letzone payments' section with a 'Label' field (containing 'Take Payment') and a 'URL' field (containing 'www.payment-provider-URL.com').

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

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

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

Letzone tenancy terms and conditions

File Edit View Insert Format Tools Table

← → B I U ↺ sans-serif 12px

Paragraph 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.

Paragraph 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.

Paragraph 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 displays the iamproperty CRM interface. At the top, there's a navigation bar with 'iamproperty', 'CRM', 'movebutler', and 'iamsold'. Below this, a sidebar on the left lists various modules like 'My day', 'Lettings', 'Sales', 'Accounts', 'Reporting', and 'Communications'. The main content area shows several settings sections. The first section, 'Letzone confirmation required', features a toggle switch labeled 'ON' and 'Letzone Tenancy Terms & Condition Enabled'. Below this, there's a sub-section with a text input field containing 'letzone Confirmation Required' and a link 'Click to Accept Terms and Conditions'. Another toggle switch for 'Letzone Tenancy Terms & Condition Enabled' is present. The 'Quality assurance tiers' section includes an 'Add' button and four tier boxes: 'Amazing', 'Good', 'Acceptable', and 'Poor', each with edit and delete icons. At the bottom, there's a 'Letzone email notifications' section with a rich text editor interface.

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

The screenshot shows the 'Quality assurance tiers' section in the Letzone portal settings. It features a toggle switch for 'Letzone Tenancy Terms & Condition Enabled' which is turned ON. Below this is a section titled 'Letzone confirmation required' with a text input field containing 'letzone Confirmation Required' and a subtext 'Click to Accept Terms and Conditions', followed by another 'Letzone Tenancy Terms & Condition Enabled' toggle switch. The 'Quality assurance tiers' section has an 'Add' button and four tier options: 'Amazing', 'Good', 'Acceptable' (highlighted with an orange circle), and 'Poor'. Each tier has an edit icon and a delete icon. Below this is the 'Letzone email notifications' section, which contains a rich text editor with a menu bar (File, Edit, View, Insert, Format, Tools, Table) and a toolbar with various formatting options. The email body text includes a placeholder for the branch logo, followed by a personalized greeting, a link to the Letzone portal, a request to login and complete the application, and a sign-off from the Lettings Team.

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 email notifications' section in the Letzone portal settings. It features a rich text editor with a menu bar (File, Edit, View, Insert, Format, Tools, Table) and a toolbar with various formatting options. The email body text includes a placeholder for the branch logo, followed by a personalized greeting, a link to the Letzone portal, a request to login and complete the application, and a sign-off from the Lettings Team. The email also includes a footer with the branch name and address, links to the Privacy Policy and Terms & Conditions, and a copyright notice for 2020.

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"

The screenshot shows the Letzone template editor interface. On the left is a sidebar with navigation options: 'Questions', 'ing Checks', 'inagement', and 'les'. The main area displays a template for a tenant notification letter. The letter content includes a greeting, a link to the LetZone portal, a login instruction, and a sign-off from the Lettings Team. Below the letter content is a 'Template Tags' section with various tags like 'Branch Name', 'Branch Address', etc. At the bottom, the 'Home visit' section contains a toggle switch for 'Home Visit Required', which is highlighted by an orange circle. A 'Save Changes' button is visible in the bottom right corner.

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

12

Click here to save the updated information

This screenshot is identical to the one above, showing the Letzone template editor. The 'Home visit' section has the 'Home Visit Required' toggle highlighted with an orange circle. Additionally, the 'Save Changes' button in the bottom right corner is also highlighted with an orange circle, indicating the next step in the process.

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