

Adding a New Tenant to a Tenancy



This guide provides a step-by-step process for adding a new tenant to an existing tenancy, making it essential for property managers or landlords looking to streamline tenant management.

1 Navigate to the Tenancy you are adding the new tenant to.

iam property

My day Lettings Sales Accounts Reporting Communications

My account

if £1000.00

posit £1000.00

Live

Details

tenants

Checklist

Renewals Checklist

Compliance

Tenant Insurance

Information

Documents

Journal

Applicant161
zagg.dave@gmail.com

Warning

7135 Pelaw Crescent, Chester le Street

Reference

Negotiator Training Dave

Branch Morgan & Co

Status Current

Tenancy Dates

Tenancy Start
09/07/2025

Tenancy End
08/07/2026

Renewal Start
09/07/2025

Vacating Date
09/06/2025

Visit Next Due
09/06/2025 15:57

Tenancy Details

Lease Period
12 Month Shorthold

Relocation Agent

General Information

With Effect Break

Notice Date

2 Click "Tenants"

The screenshot shows the iamproperty CRM interface. The top navigation bar includes 'My day', 'Lettings', 'Sales', 'Accounts', 'Reporting', and 'Communications'. The left sidebar has a 'Details' section with a 'Tenants' link highlighted by an orange circle. The main content area displays the tenant profile for 'Applicant161' (zagg.dave@gmail.com) at '7135 Pelaw Crescent, Chester le Street'. Below the profile, there are filters for 'Reference', 'Negotiator' (Training Dave), 'Branch' (Morgan & Co), and 'Status' (Current). The 'Tenancy Dates' section shows a table with the following data:

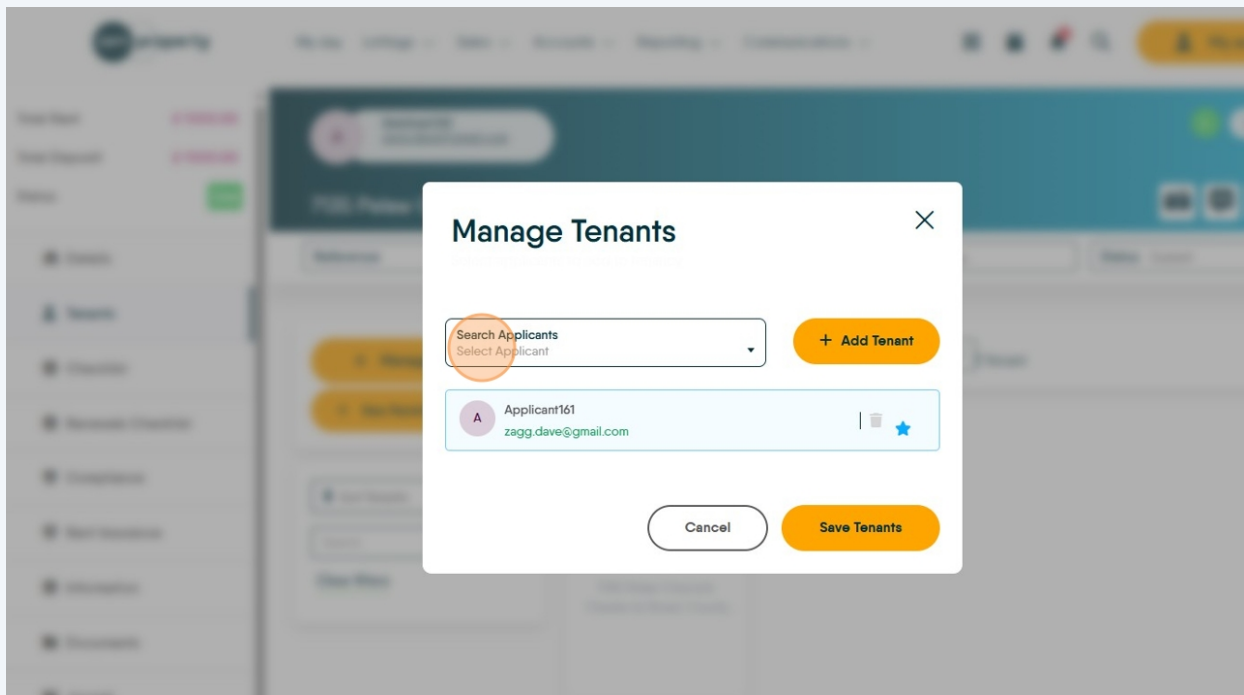
| Tenancy Start | Tenancy End | Renewal Start | Vacating Date | Visit Next Date |
|---------------|-------------|---------------|---------------|-----------------|
| 09/07/2025 | 08/07/2026 | 09/07/2025 | 09/06/2025 | 09/06/2025 |

Below the dates, there are tabs for 'Tenancy Details' and 'General Information'.

3 Click "Manage Tenants"

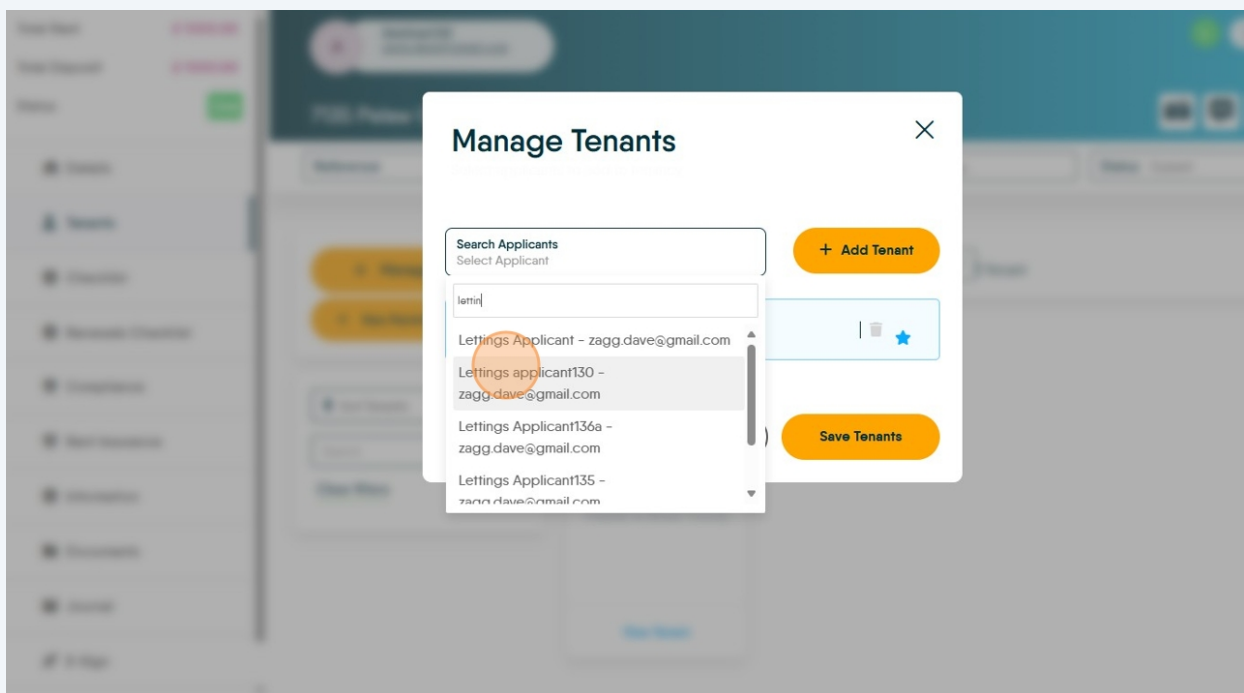
The screenshot shows the iamproperty CRM interface. The top navigation bar is the same as in the previous screenshot. The left sidebar has a 'Tenants' link highlighted by an orange circle. The main content area displays the tenant profile for 'Applicant161' (zagg.dave@gmail.com) at '7135 Pelaw Crescent, Chester le Street'. Below the profile, there are filters for 'Reference', 'Negotiator' (Training Dave), 'Branch' (Morgan & Co), and 'Status' (Current). The 'Manage Tenants' button is highlighted by an orange circle. Below the button, there is a 'Sort Tenants' dropdown menu, a search bar, and a 'Clear filters' link. The 'Tenants' section shows a list of tenants, with one tenant visible: 'Applicant161' (zagg.dave@gmail.com) at '7135 Pelaw Crescent, Chester le Street, County...'.

4 Click "Select Applicant"



5 Click if the applicant is already in your CRM then in the "Search Applicants" fields type the name and select it. If not click "+Add Tenant" to add their details.

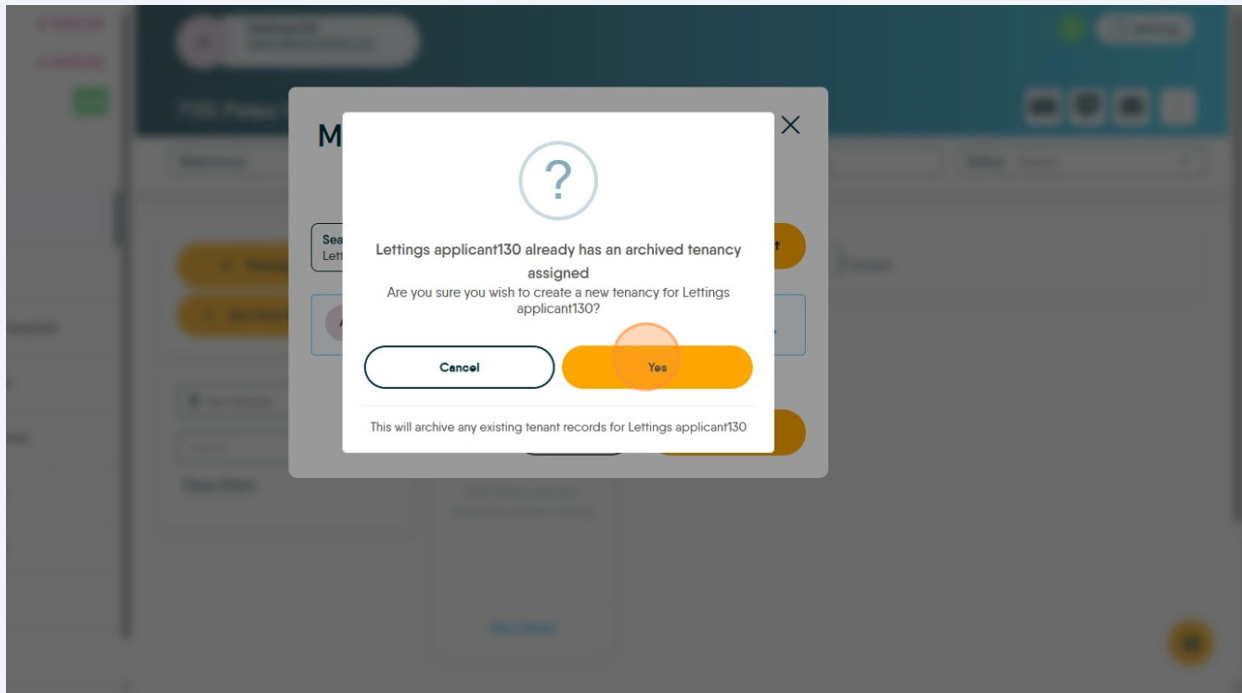
Once the new applicant has been selected from the list, click the "Save Tenants" button to add the new tenant to your Tenancy.



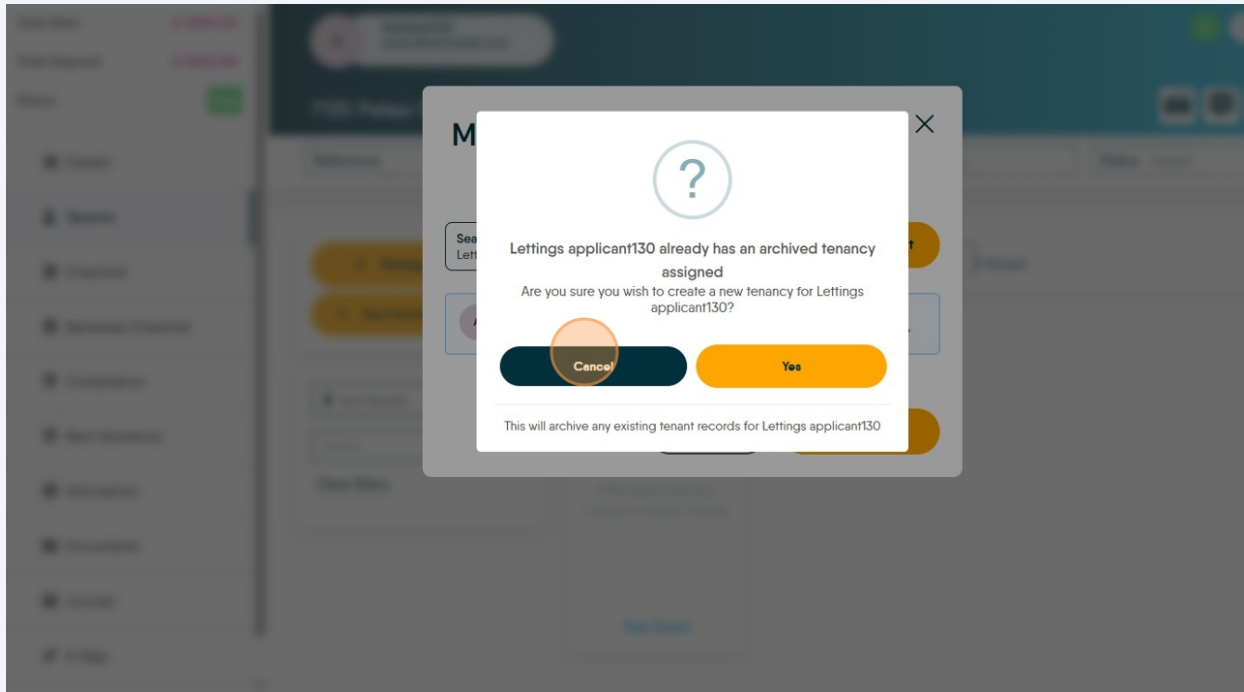
6

If the tenant you have selected already has a current tenancy, the CRM will warn you and ask if you wish to create the new tenant. Click "Are you sure you wish to create a new tenancy for.....?"

This will archive the current tenant records.

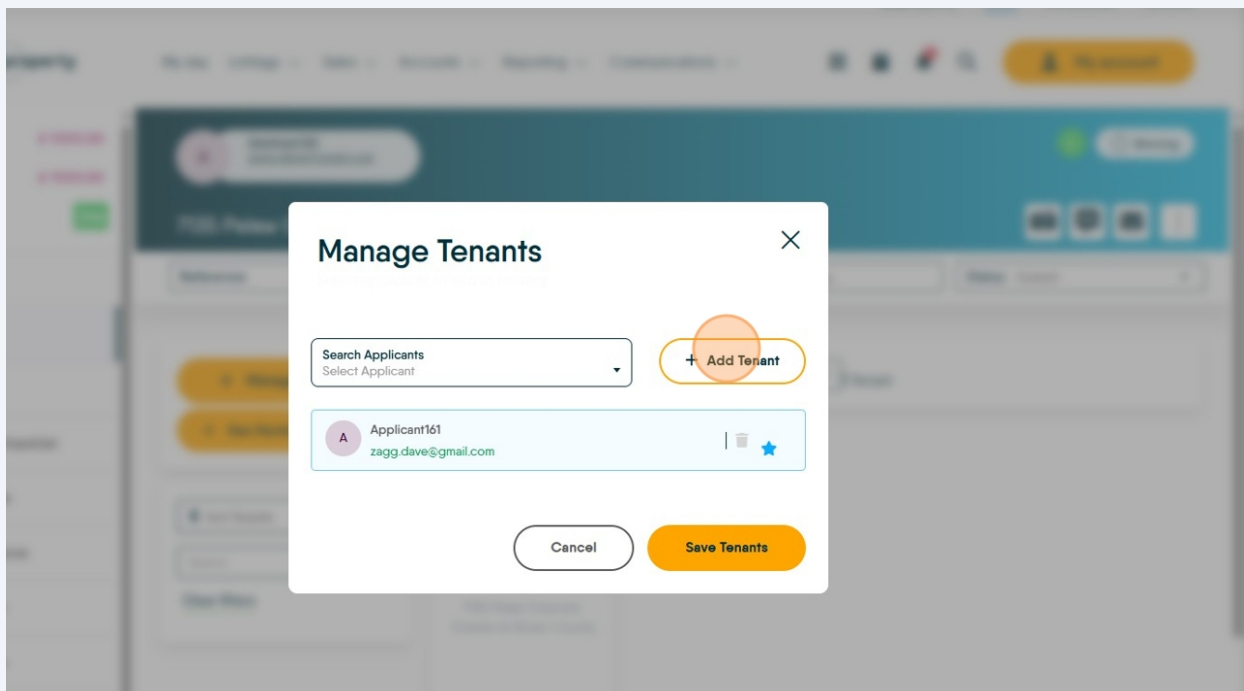


- 7 Click "Cancel" to not create the new tenancy.



Add New Tenant

- 8 If your new tenant is not currently in CRM. To add a new tenant to the CRM. Click "Add Tenant"



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Scroll down the screen you are taken to and in the 'Personal Information' fields complete as much information as you can. As a minimum complete the fields with a red star. Click the "Surname" field.

iamproperty CRM movebutle

My day Lettings Sales Accounts Reporting Communications

Rent Amount £ 0.00
Rent Period Monthly
Rent Due 9 Aug 2025
Overdue Balance £0.00
Overdue Date
Days Overdue 0
Last Contacted 01/01/0001 00:00

Personal Information

Title Forename
Surname * Company Name
Website Phone Number
Work phone Mobile phone
Email Address * Salutation
☐ Tenant doesn't have an email address Source Advert
Date of Birth Age

Additional Information

Occupation Employer
NI Number Agreement Name Applicant161
Rent Review Rent Type Please select a rent type
Automatically Rent Inv. Use Alternate Address
Housing Benefit Case Number
£ Hb charged ahead Check this if the HB Rent Charge in Ahead Method.
£ Hb charged arrears Check this if the HB Rent Charge in Arrears Method
Quality Assurance

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Click the "Email Address" field.

Rent Amount £ 0.00
Rent Period Monthly
Rent Due 9 Aug 2025
Overdue Balance £0.00
Overdue Date
Days Overdue 0
Last Contacted 01/01/0001 00:00

Personal Information

Title Forename new
Surname tenant Company Name
Website Phone Number
Work phone Mobile phone
Email Address * Salutation
☐ Tenant doesn't have an email address Source Advert
Date of Birth Age

Additional Information

Occupation Employer
NI Number Agreement Name Applicant161
Rent Review Rent Type Please select a rent type
Automatically Rent Inv. Use Alternate Address
Housing Benefit Case Number
£ Hb charged ahead Check this if the HB Rent Charge in Ahead Method.
£ Hb charged arrears Check this if the HB Rent Charge in Arrears Method
Quality Assurance Please configure priority levels first.

Addresses

forwarding address

Contact Notes

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Click here to save the details added. Return to the original Tenancy record, it will be open as a tab on your screen.

The screenshot shows the 'Tenant Rent Details' form. At the top, there's a header with a toggle switch, a 'Set GDPR' button, and a 'Tenancy Expiry 337 Days' notification. Below the header, there are input fields for 'Reference:', 'Negotiator: Training Dave', 'Branch: Morgan & Co', and 'Status: Prebooked'. The main section contains five cards: 'Rent' (£ 0.00), 'Deposit' (0.00), 'Holding Deposit' (0.00), 'Collection Day' (Same Day), and 'Next Rent Due' (09/08/2025). Below these is a 'Rent Period' section set to 'Monthly'. A 'Save Changes' button with a disk icon is highlighted with an orange circle at the bottom right.

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Click "View Tenant"

The screenshot shows the 'View Tenant' screen. The header includes a user profile for 'Applicant161 zagg.dave@gmail.com' and a 'Warning' icon. Below the header, there's a section for '7135 Pelaw Crescent, Chester le Street'. The main area displays a list of tenants. On the left, there are buttons for '+ Manage Tenants' and '+ New Permitted Occupier', along with a 'Sort Tenants' dropdown and a search bar. The tenant list shows two entries: 'Applicant161 zagg.dave@gmail.com' and 'New tenant zagg.dave@gmail.com'. The 'View Tenant' button for the 'New tenant' is highlighted with an orange circle. A '2 Tenants' indicator is also present.

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Make sure that the rent, deposit and Holding Deposit screens are correct. If the figures are £0 then no rent invoice will be uploaded, if the tenants are splitting the rent, make sure that each tenant has their split set. If the rents etc are not set correctly then the rent invoices will be incorrect. Click this number field.

The screenshot shows a software interface for managing tenant details. On the left is a sidebar with navigation links: Details, Accounts, Checklist, Financial, Contacts, Documents, and letzone. The main area displays the 'Tenant Rent Details' form for a new tenant named 'zaggy.dave@gmail.com' at '7135 Pelaw Crescent, Chester le Street'. The form includes fields for Reference, Negotiator (Training Dave), Branch (Morgan & Co), and Status (Prebooked). The 'Tenant Rent Details' section contains five input fields: Rent (highlighted with an orange circle), Deposit, Holding Deposit, Collection Day (set to Same Day), and Next Rent Date (09/08/2025). Below these is a 'Rent Period' section set to Monthly. The top of the interface shows a status bar with 'TE', 'Warning', 'Set GDPR', and 'Tenancy Expiry 337 Days'.

This screenshot is identical to the one above, showing the same 'Tenant Rent Details' form. In this instance, the 'Deposit' field is highlighted with an orange circle, indicating the next field to be checked or edited. All other elements, including the sidebar, navigation links, and form fields, remain the same.



Alert! Remember to Save the data you add.