

# 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.

The screenshot shows the iam property software interface. The top navigation bar includes 'My day', 'Lettings', 'Sales', 'Accounts', 'Reporting', 'Communications', and 'My account'. The main content area displays a tenancy record for '7135 Pelaw Crescent, Chester le Street'. The record includes fields for 'Reference' (set to 'Negotiator Training Dave'), 'Branch' (set to 'Morgan & Co'), and 'Status' (set to 'Current'). On the left, a sidebar lists various management tasks: 'Details', 'Tenants', 'Checklist', 'Renewals Checklist', 'Compliance', 'Ten Insurance', 'Information', 'Documents', and 'Journal'. The central part of the screen shows 'Tenancy Dates' with five boxes: 'Tenancy Start' (09/07/2025), 'Tenancy End' (08/07/2026), 'Renewal Start' (09/07/2025), 'Vacating Date' (09/06/2025), and 'Visit Next Due' (09/06/2025 15:57). Below these are sections for 'Tenancy Details' (Lease Period: '12 Month Shorthold') and 'General Information' (With Effect Break and Notice Date).

## 2 Click "Tenants"

Total Rent £1000.00  
Total Deposit £1000.00  
Status Live

Reference: Applicant161  
Negotiator: Training Dave  
Branch: Morgan & Co  
Status: Current

Tenancy Dates

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

Tenancy Details | General Information

## 3 Click "Manage Tenants"

Total Rent £1000.00  
Total Deposit £1000.00  
Status Live

Reference: Applicant161  
Negotiator: Training Dave  
Branch: Morgan & Co  
Status: Current

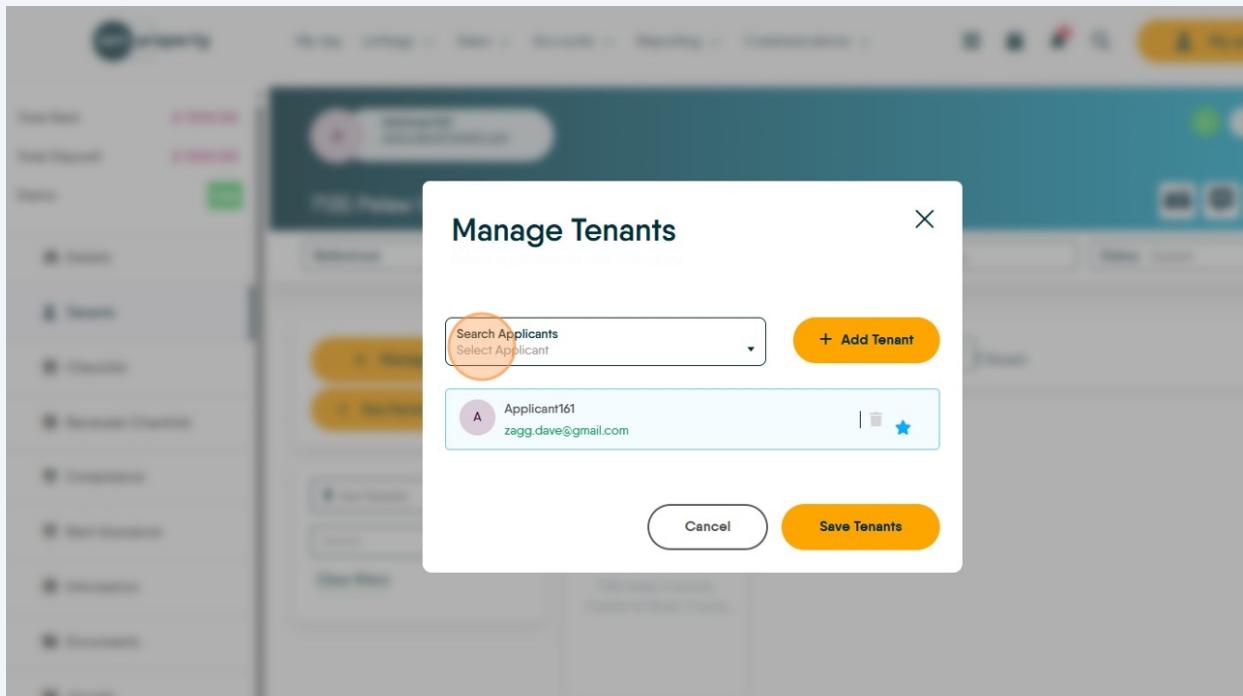
+ Manage Tenants  
+ New Permitted Occupier

Sort Tenants | Search | Clear filters

1 Tenant

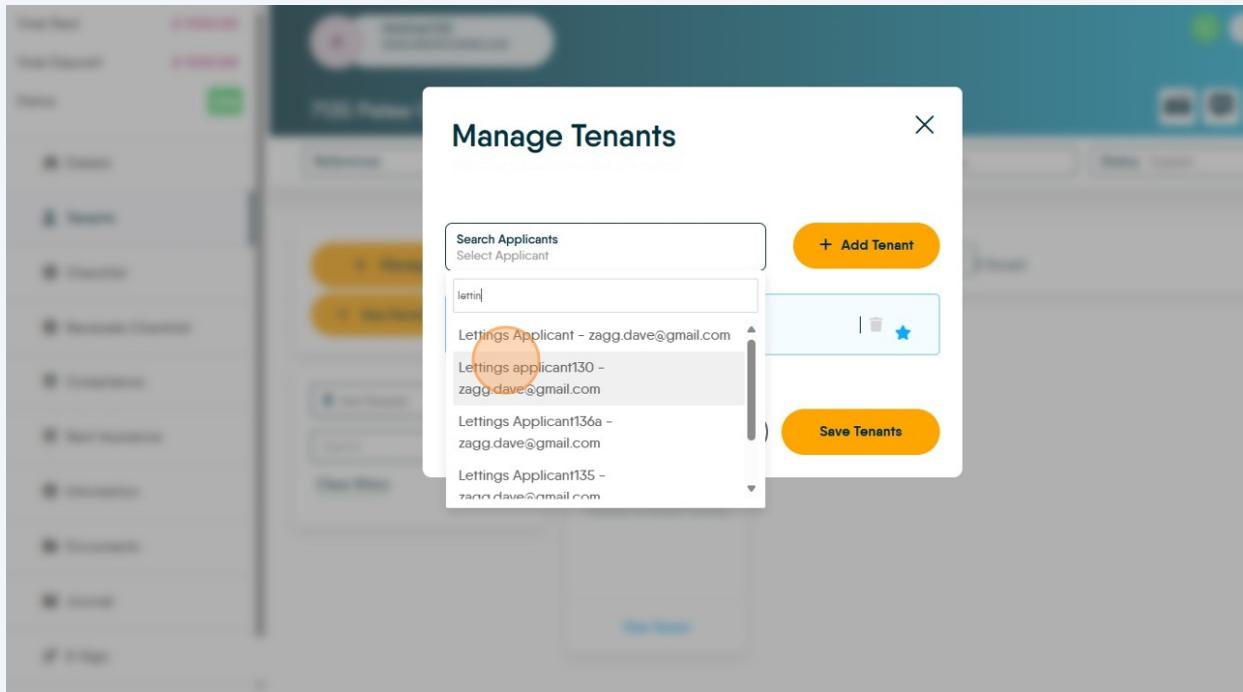
Applicant161  
zagg.dave@gmail.com  
7135 Pelaw Crescent,  
Chester le Street, County...

4 Click "Select Applicant"



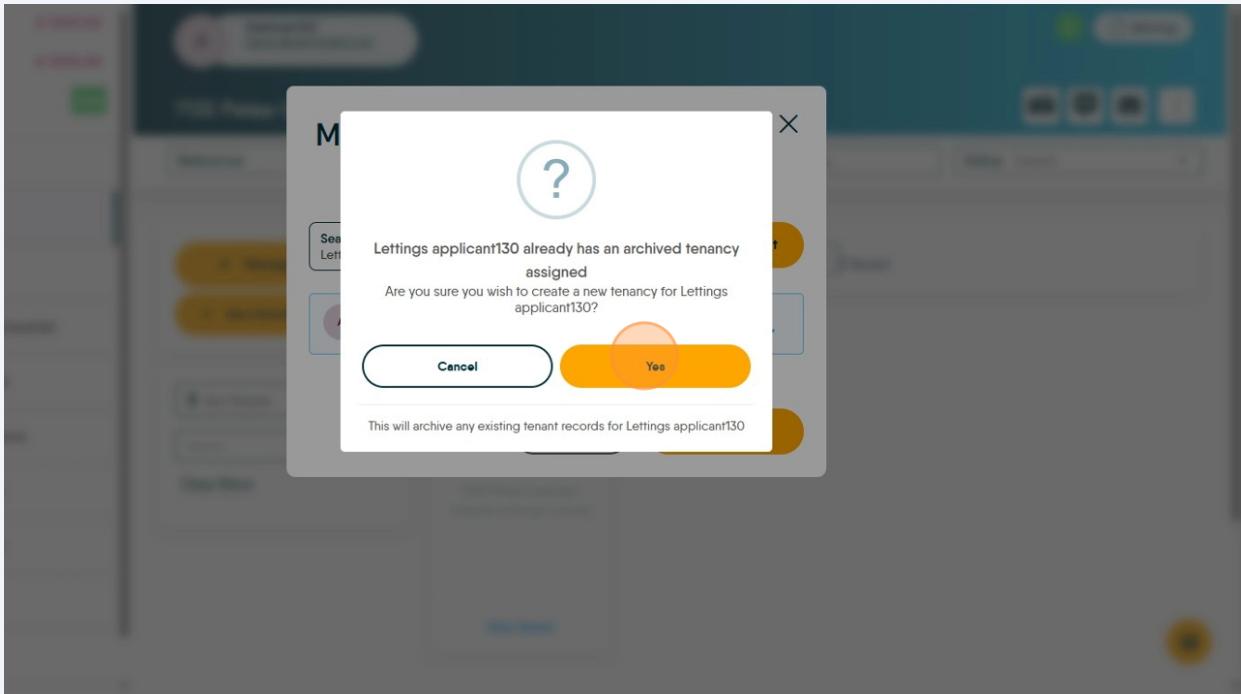
5 Click if the applicant is already in your CRM then in the "Search Applicants" fields type the name and select it. If not click "+Add Tenant" to add their details.

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

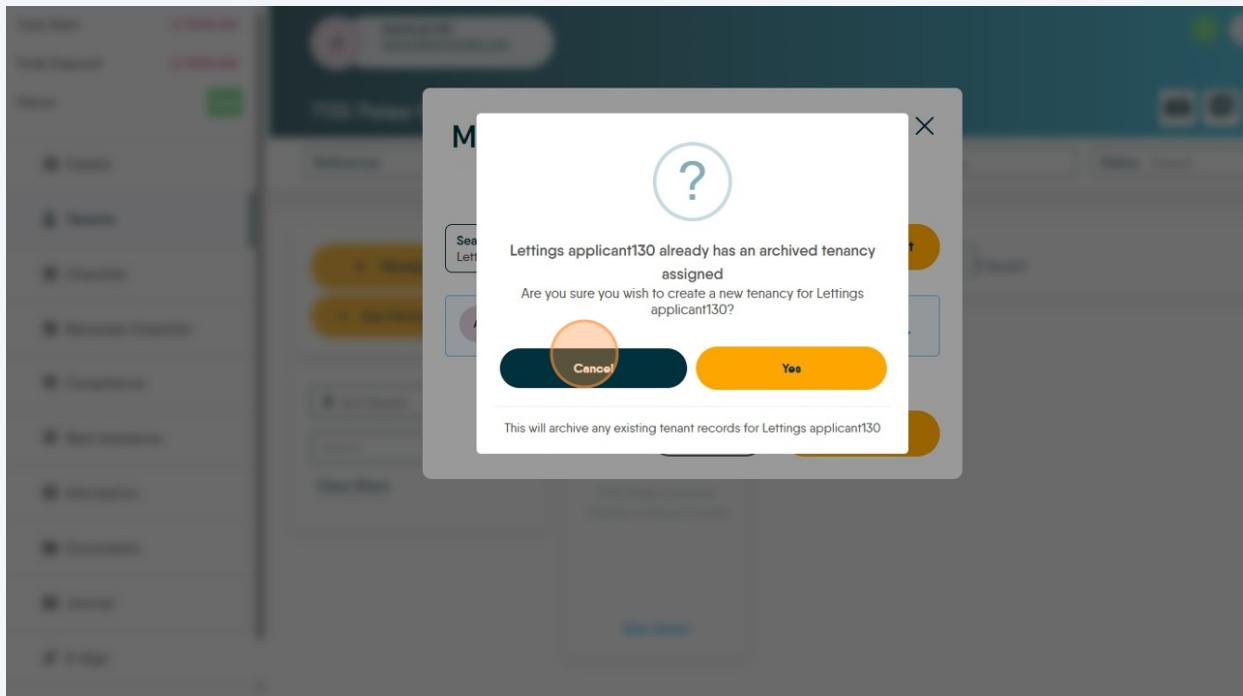


6 If the tenant you have selected already has a current tenancy, the CRM will warn you and ask if you wish to create the new tenant. Click "Are you sure you wish to create a new tenancy for.....?"

This will archive the current tenant records.

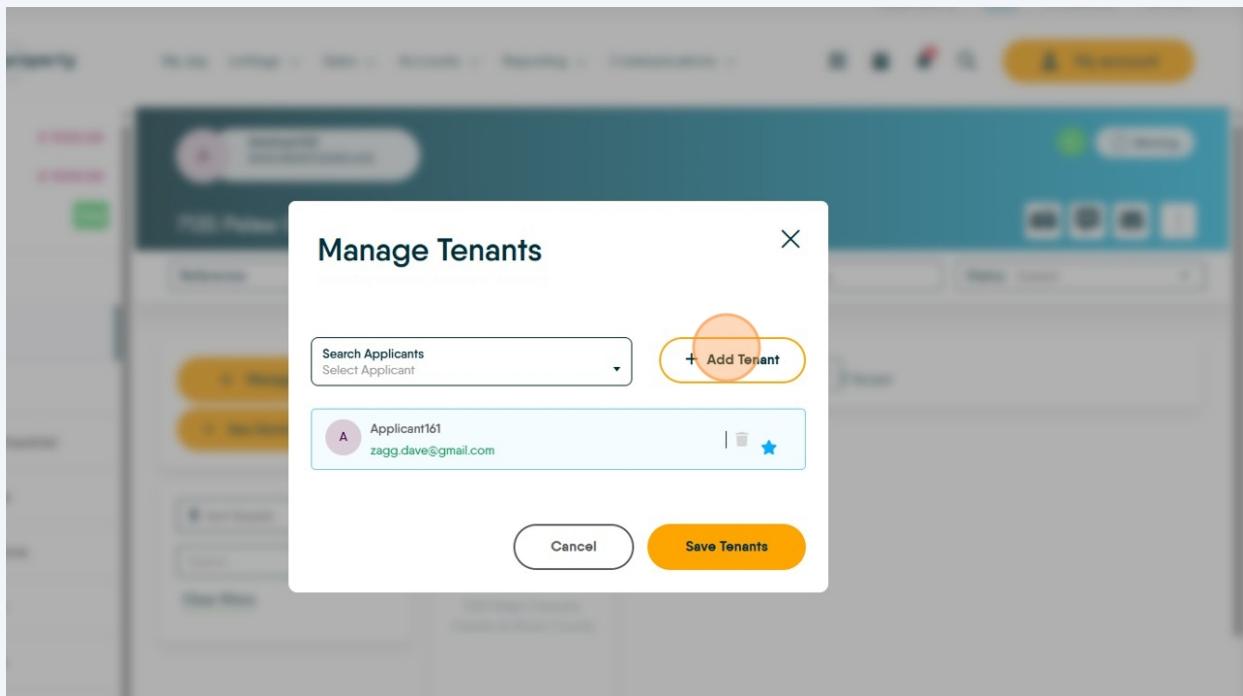


7 Click "Cancel" to not create the new tenancy.



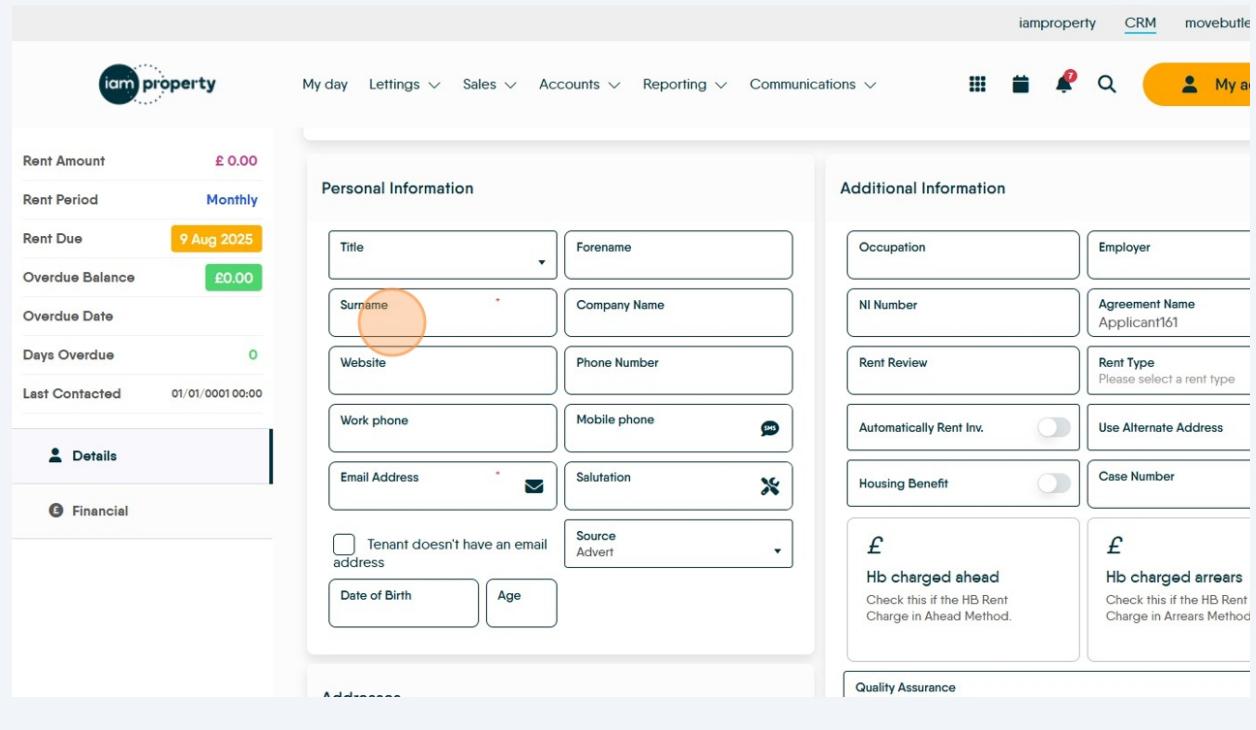
## Add New Tenant

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



9

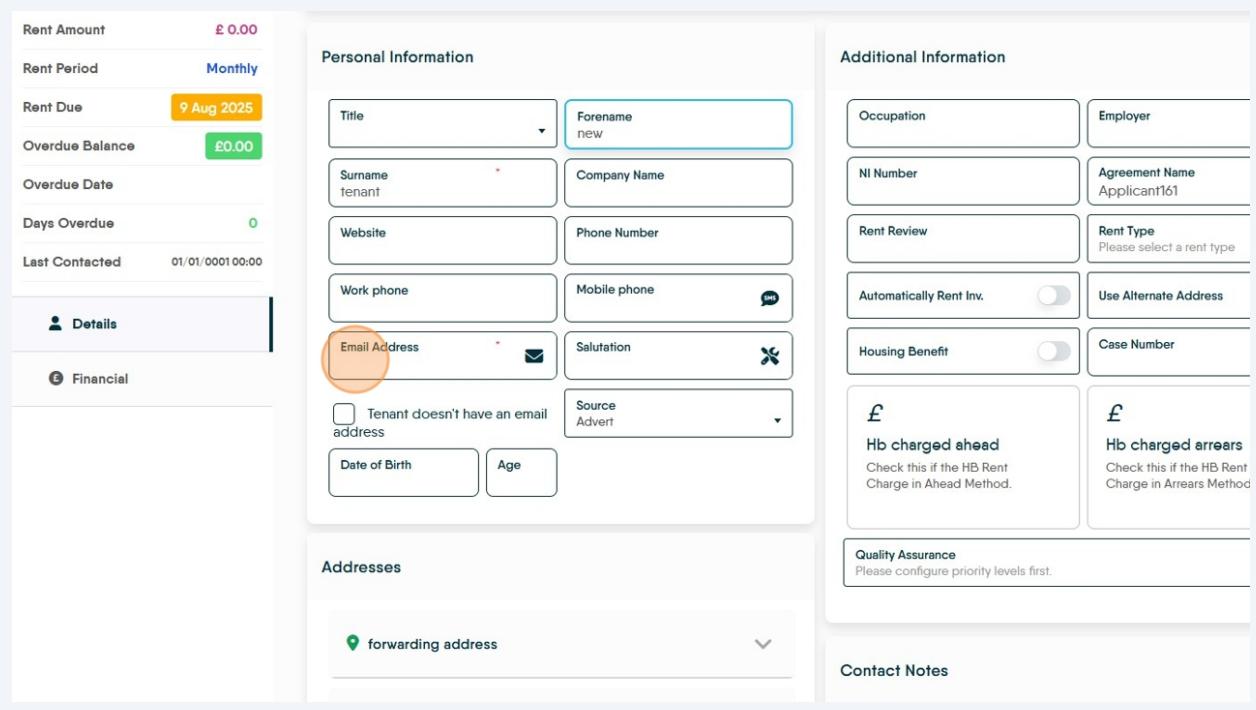
Scroll down the screen you are taken to and in the 'Personal Information' fields complete as much information as you can. As a minimum complete the fields with a red star. Click the "Surname" field.



The screenshot shows the 'Personal Information' section of the software. The 'Surname' field is highlighted with a red circle. Other fields in this section include Title, Forename, Website, Company Name, Work phone, Mobile phone, Email Address, Salutation, Source, and Date of Birth. The 'Additional Information' section contains fields for Occupation, Employer, NI Number, Agreement Name, Rent Review, Rent Type, Automatically Rent Inv., Use Alternate Address, Housing Benefit, Case Number, and Quality Assurance. The 'Financial' section shows a Rent Amount of £0.00, Rent Period of Monthly, Rent Due of 9 Aug 2025, and Overdue Balance of £0.00.

10

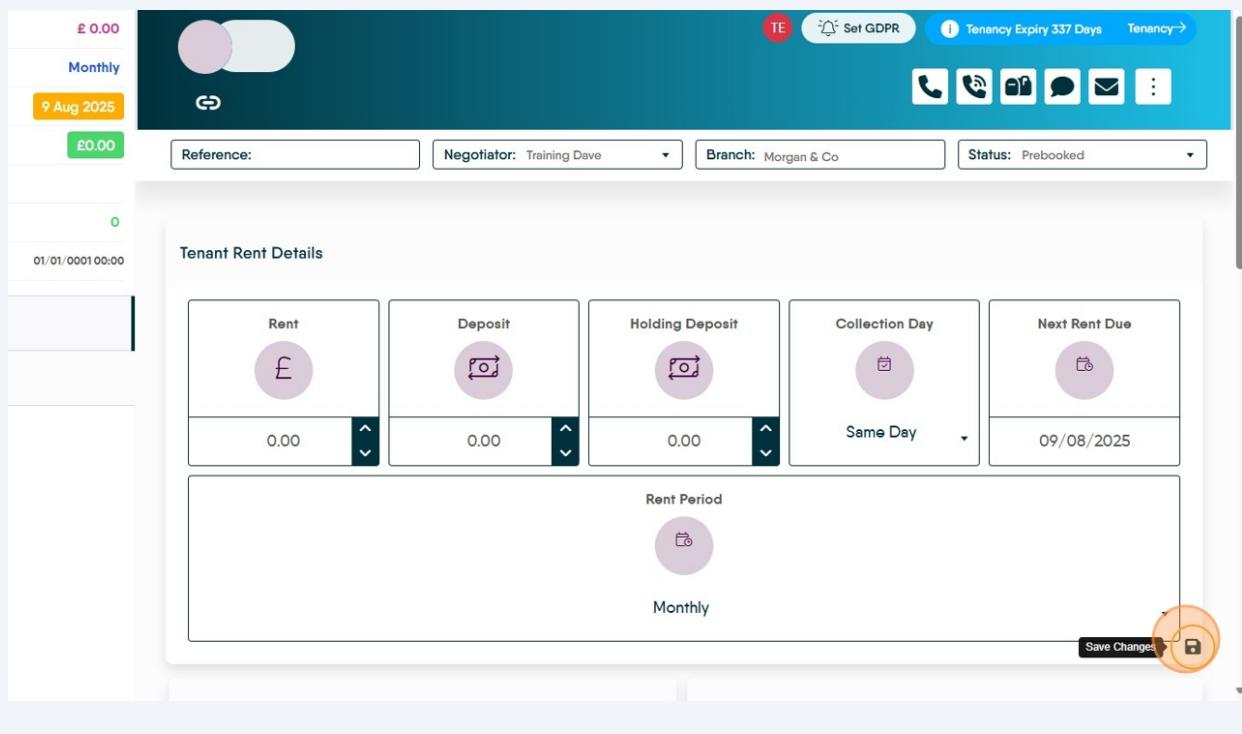
Click the "Email Address" field.



The screenshot shows the 'Personal Information' section of the software. The 'Email Address' field is highlighted with a red circle. Other fields in this section include Title, Forename, Surname, Company Name, Website, Phone Number, Work phone, Mobile phone, Salutation, Source, and Date of Birth. The 'Additional Information' section contains fields for Occupation, Employer, NI Number, Agreement Name, Rent Review, Rent Type, Automatically Rent Inv., Use Alternate Address, Housing Benefit, Case Number, and Quality Assurance. The 'Financial' section shows a Rent Amount of £0.00, Rent Period of Monthly, Rent Due of 9 Aug 2025, and Overdue Balance of £0.00.

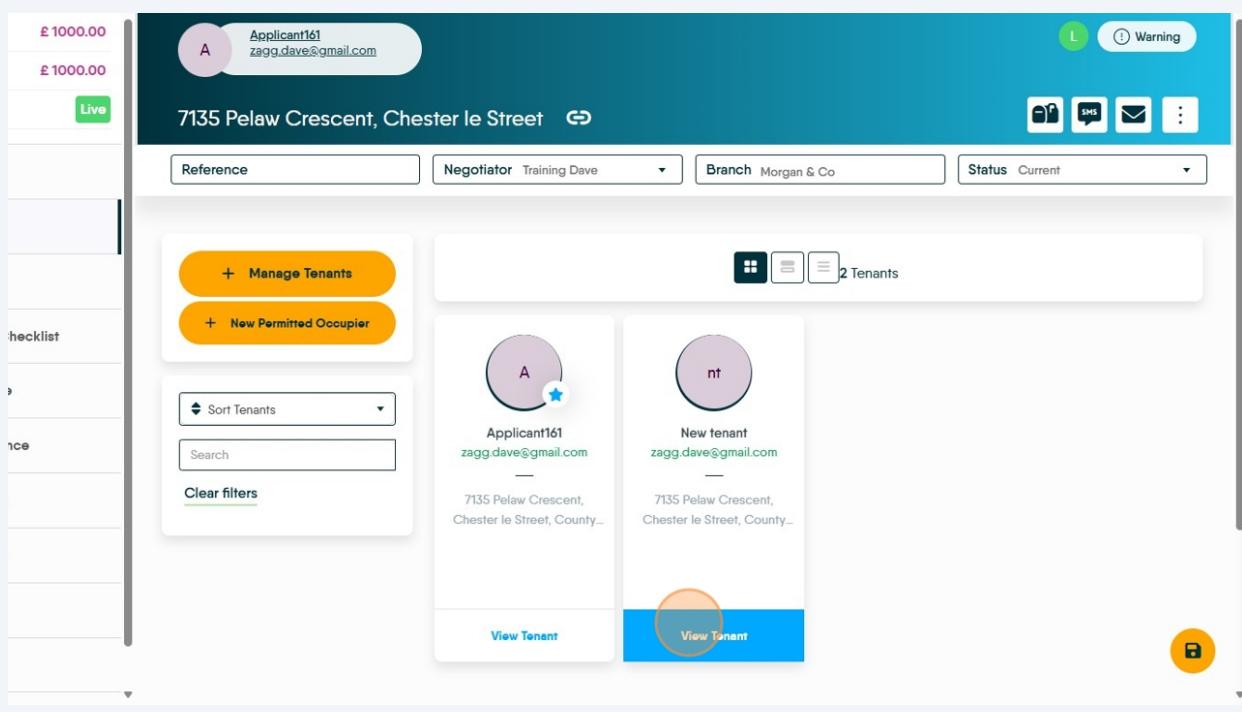
11

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



12

Click "View Tenant"



13

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.

**Tenant Rent Details**

Rent	Deposit	Holding Deposit	Collection Day	Next Rent Due
£ 0.00	£ 0.00	£ 0.00	Same Day	09/08/20

Rent Period: Monthly

**Tenant Rent Details**

Rent	Deposit	Holding Deposit	Collection Day	Next Rent Due
£ 0.00	£ 0.00	£ 0.00	Same Day	09/08/20

Rent Period: Monthly



Alert! Remember to Save the data you add.