

# Creating a HMO Tenancy



This guide shows how to create individual rooms in a property enabling the CRM to help with renting rooms in the same property a room at a time rather than as a whole property. Creating a HMO property.

This helps with renting rooms in properties where tenants may be joining at different times.

## Enabling the HMO feature in CRM

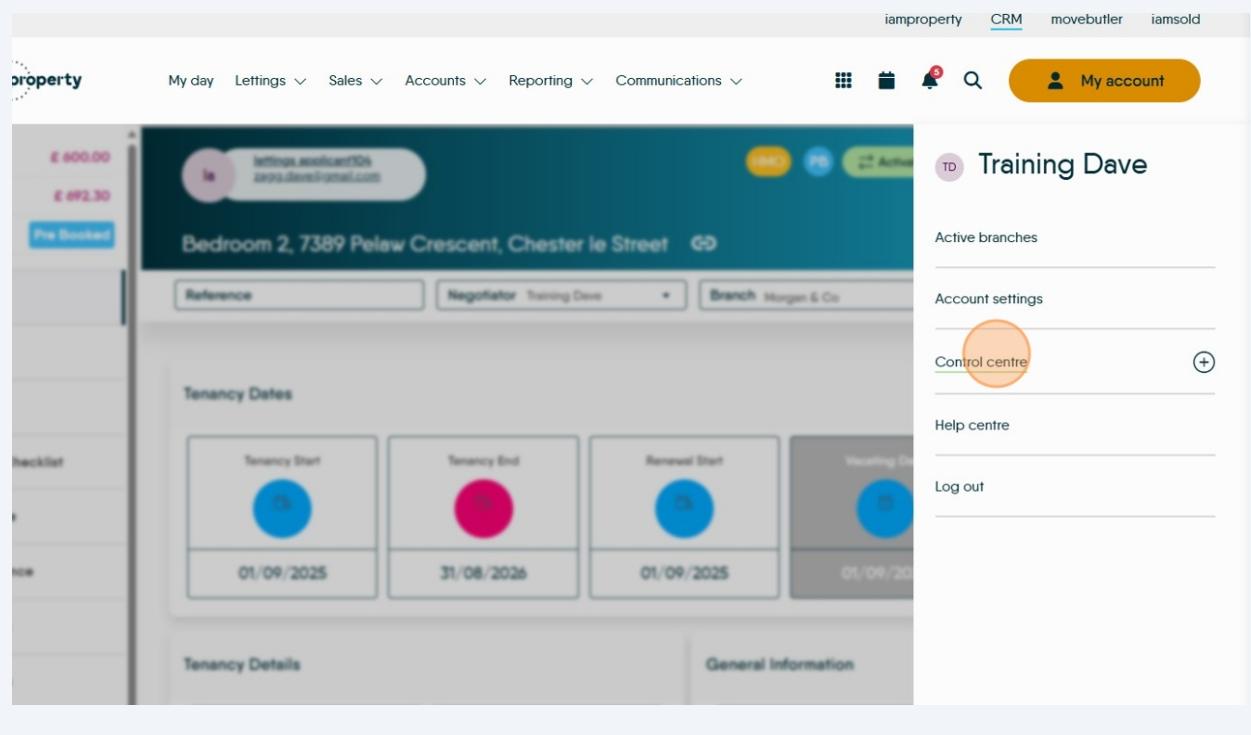


This feature is not a default part of CRM and needs to be enabled by iamproperty CRM Support. Please contact us [crm.support@iamproperty.com](mailto:crm.support@iamproperty.com)

- Once enabled on your CRM. Click "**My account**"

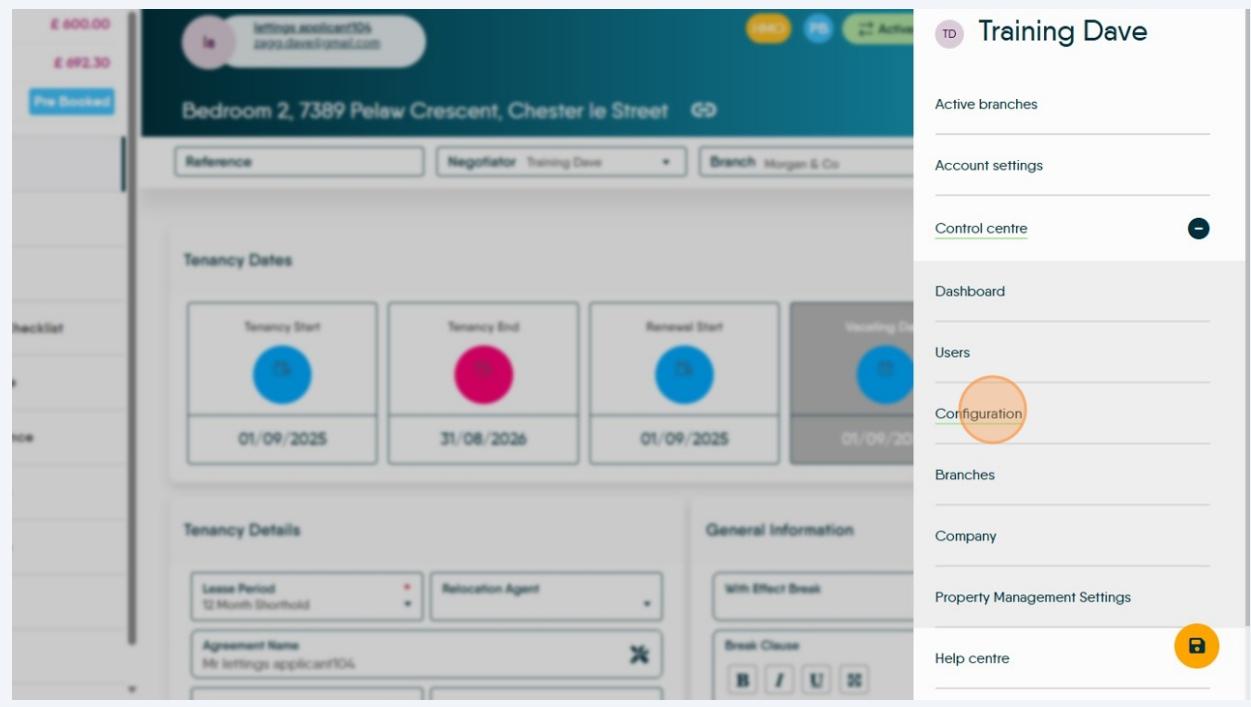
The screenshot shows the iamproperty CRM interface. At the top, there is a navigation bar with links for 'My day', 'Lettings', 'Sales', 'Accounts', 'Reporting', 'Communications', and 'CRM'. The 'CRM' link is underlined. To the right of the navigation bar are several icons: a grid, a file, a bell with a red dot, a magnifying glass, and a user profile. The user profile icon is highlighted with an orange circle. Below the navigation bar, there is a header with a profile picture, the text 'lettings applicant104' and 'zagg.dave@gmail.com', and several status buttons: 'HMO' (yellow), 'PB' (blue), 'Activate' (green), 'Warning' (orange), and 'Select Property' (grey). The main content area displays a tenancy record for 'Bedroom 2, 7389 Pelaw Crescent, Chester le Street'. It shows 'Tenancy Dates' with 'Tenancy Start' on 01/09/2025, 'Tenancy End' on 31/08/2026, 'Renewal Start' on 01/09/2025, 'Vacating Date' on 01/09/2025, and 'Visit Next Due' on 01/09/2025 at 15:13. Below this, there are tabs for 'Tenancy Details' and 'General Information'. On the left side of the interface, there is a vertical sidebar with sections for 'Checklist' and 'Finance'.

## 2 Click "Control centre"



The screenshot shows the iamsold software interface. At the top, there is a navigation bar with links: 'My day', 'Lettings', 'Sales', 'Accounts', 'Reporting', 'Communications', 'CRM', 'movebutler', and 'iamsold'. Below the navigation bar, there is a search bar and a 'My account' button. The main content area displays a property listing for 'Bedroom 2, 7389 Pelaw Crescent, Chester le Street'. On the left, there is a sidebar with a 'Checklist' section. On the right, there is a sidebar titled 'Training Dave' with a list of options: 'Active branches', 'Account settings' (which is highlighted with an orange circle), 'Help centre', and 'Log out'. The 'Account settings' option has a '+' sign next to it. The central area shows 'Tenancy Dates' with four boxes: 'Tenancy Start' (01/09/2025), 'Tenancy End' (31/08/2026), 'Renewal Start' (01/09/2025), and 'Vacating Date' (01/09/2026). Below this are tabs for 'Tenancy Details' and 'General Information'.

## 3 Click "Configuration"



The screenshot shows the iamsold software interface, similar to the previous one but with different highlighted options. The 'Control centre' option in the sidebar is now highlighted with an orange circle. The central area shows the same property listing and tenancy details. The sidebar on the right now includes 'Control centre' (highlighted with an orange circle), 'Dashboard', 'Users', 'Configuration' (highlighted with an orange circle), 'Branches', 'Company', 'Property Management Settings', and 'Help centre'. The 'Configuration' option has a '-' sign next to it. The central area shows 'Tenancy Details' and 'General Information' tabs.

4 Scroll down the left side menu and select Click "Lettings"

5 Click here to enable the "HMO Tenancies" option.

6 Once this is enabled return back to the CRM screens e.g. Click "Lettings"

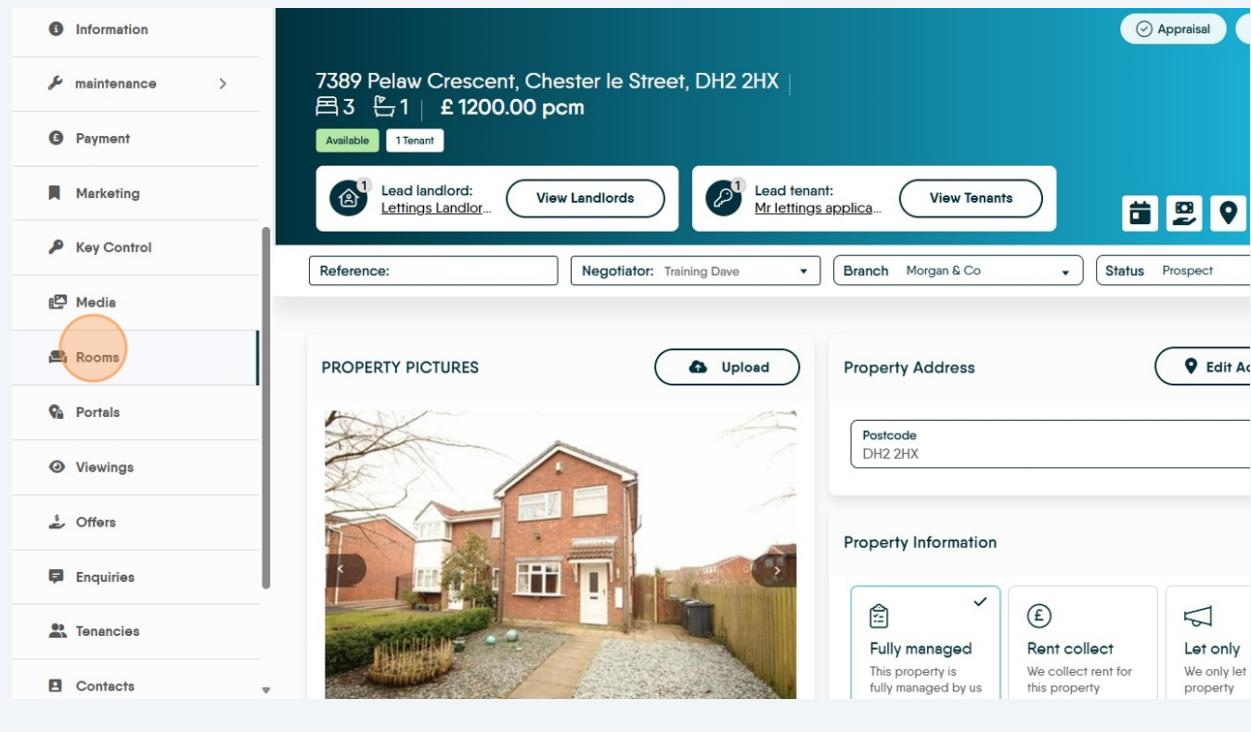
The screenshot shows the 'Lettings' configuration screen in the iam property CRM. On the left, there is a sidebar with various options: MOS Templates, SMTP, SMS, Letters, E-Sign, Portals, User Log In, Security Roles, Property Management, and Referencing Checks (By Vision+). The 'Lettings' tab is highlighted. On the right, there is a 'Switches' section containing a toggle switch for 'HMO Tenancies', which is currently turned on (blue). The top navigation bar includes 'My day', 'Lettings', 'Sales', 'Accounts', 'Reporting', 'Communications', and 'Control Centre > Configuration > Lettings'. The top right corner shows 'iamproperty', 'CRM', 'movebutler', and a 'My account' button.

## Creating the HMO Tenancy

7 Navigate to the property you are renting the rooms in.

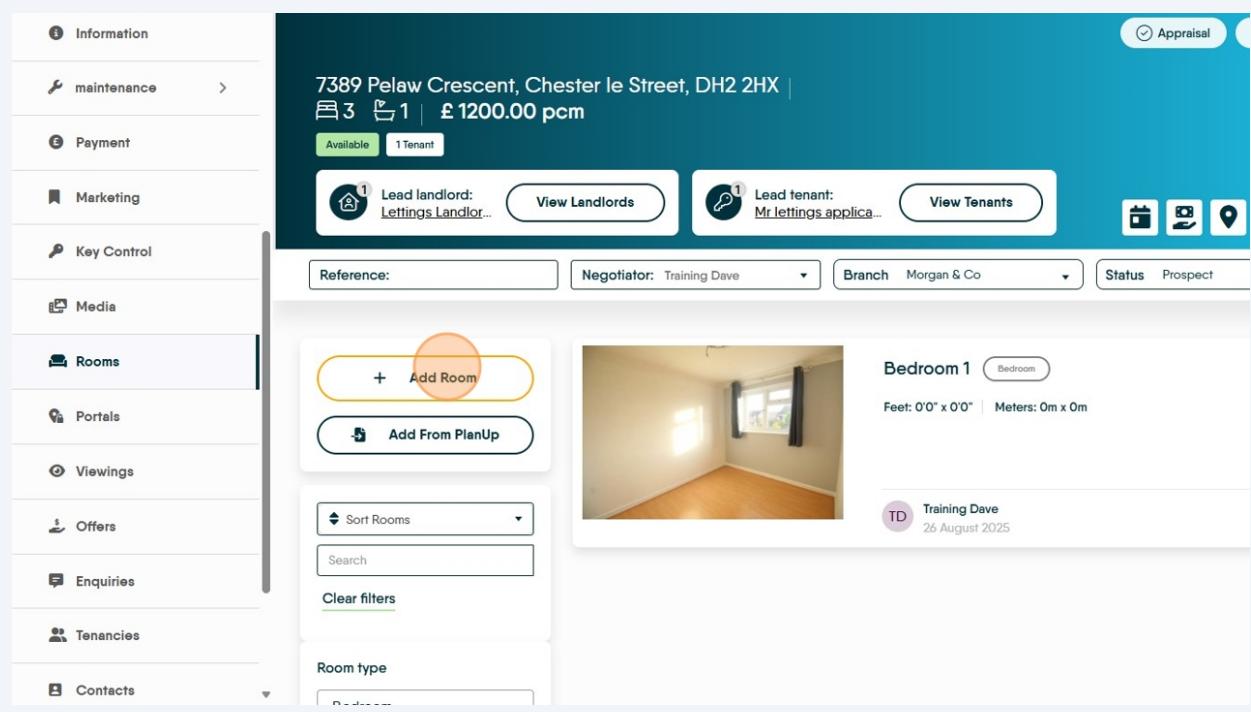
The screenshot shows the property details for 7389 Pelaw Crescent, Chester le Street, DH2 2HX. The property is listed as 'Available' with '1 Tenant'. It shows a price of £1200.00 pcm. The interface includes sections for 'Information', 'Maintenance', 'Payment', 'Marketing', 'Key Control', 'Media', 'Rooms', 'Portals', 'Viewings', 'Offers', and 'Enquiries'. On the right, there are sections for 'PROPERTY PICTURES' (with a thumbnail of the property), 'Property Address' (with a 'Postcode' field containing 'DH2 2HX'), and 'Property Information' (with fields for 'Type', 'Price', and 'Amenities'). The top navigation bar is identical to the previous screenshot, and the top right corner shows 'My account'.

8 Scroll down the left menu and click "Rooms"



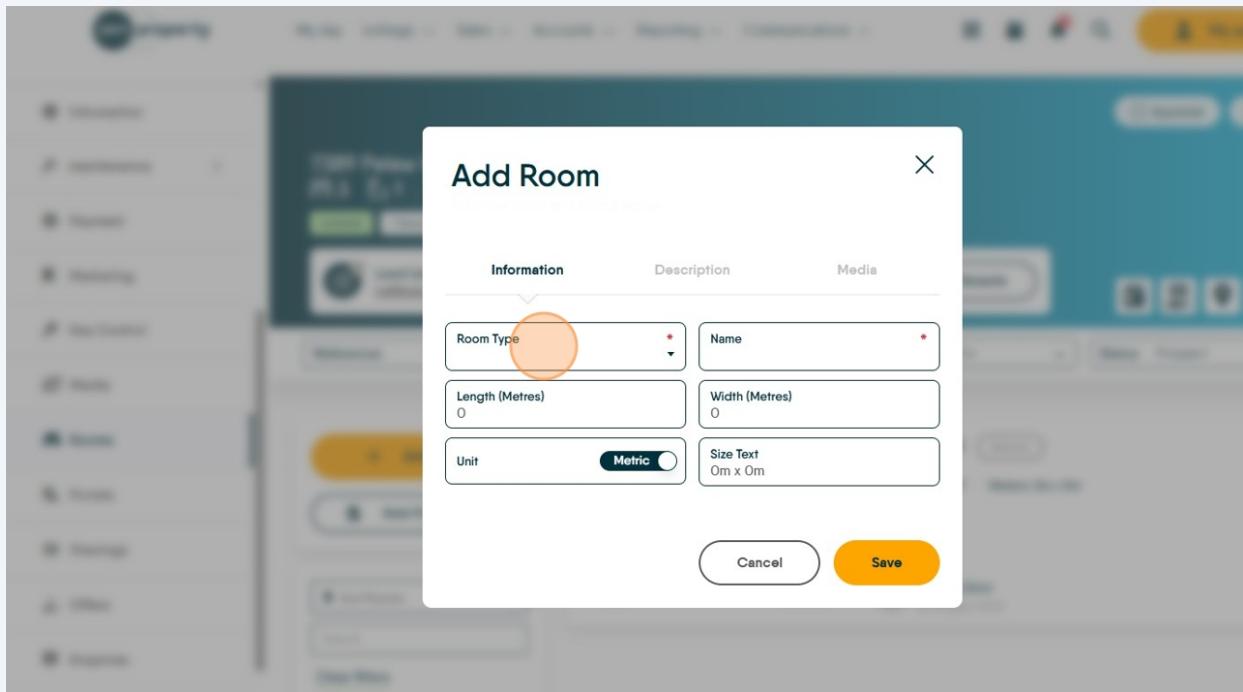
The screenshot shows the software's main dashboard for a property at 7389 Pelaw Crescent, Chester le Street, DH2 2HX. The left sidebar has a 'Rooms' item highlighted with an orange circle. The main content area displays property pictures, a property address (Postcode: DH2 2HX), and property information (Fully managed, Rent collect, Let only). Navigation tabs at the top include 'Appraisal', 'Information', 'maintenance', 'Payment', 'Marketing', 'Key Control', 'Media', 'Rooms', 'Portals', 'Viewings', 'Offers', 'Enquiries', 'Tenancies', and 'Contacts'.

9 Click "Add Room"

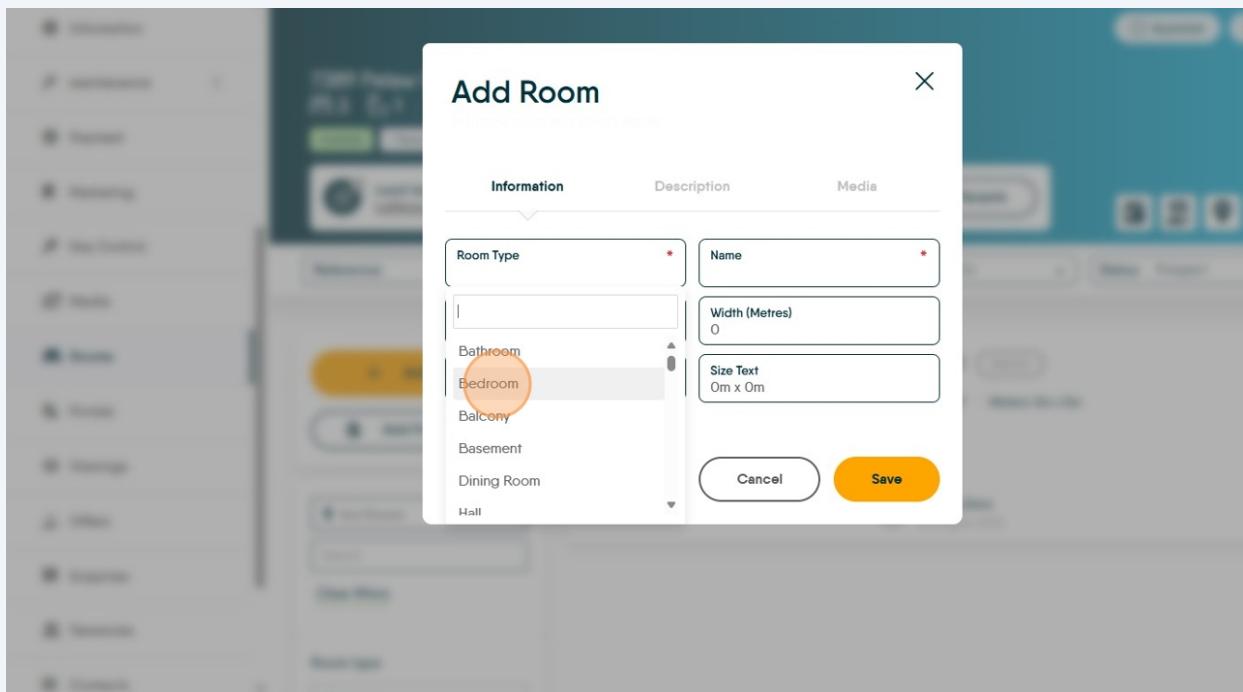


The screenshot shows the software's main dashboard for the same property. The 'Rooms' item in the sidebar is highlighted with an orange circle. The main content area shows a list of rooms, with 'Bedroom 1' listed as a bedroom with dimensions of 0'0" x 0'0". A button labeled '+ Add Room' is highlighted with an orange circle. Navigation tabs at the top are identical to the previous screenshot.

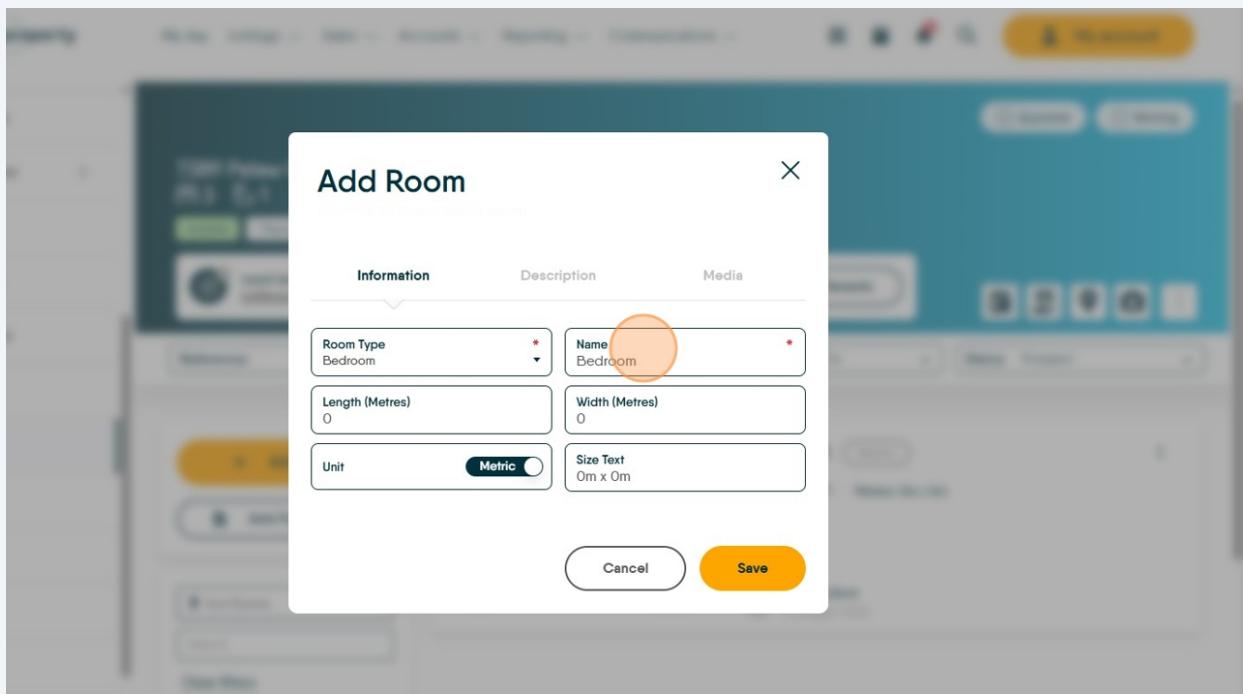
10 Click here.



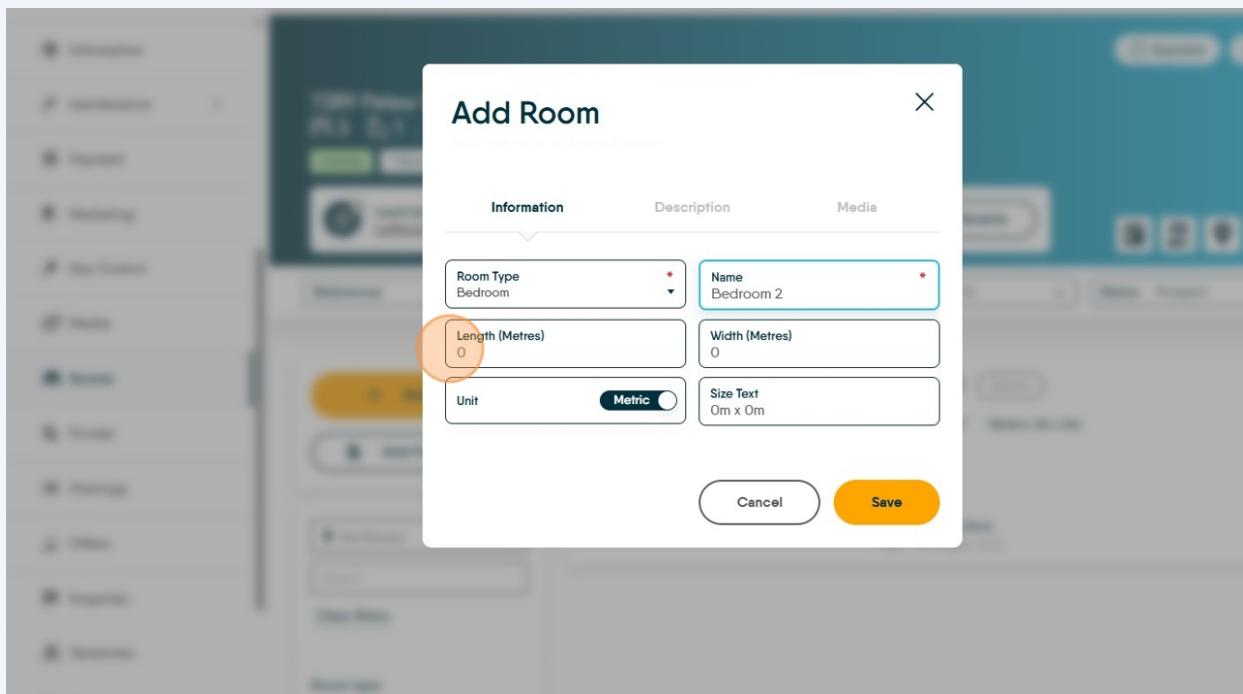
11 Click "**Bedroom**" or the appropriate room type.



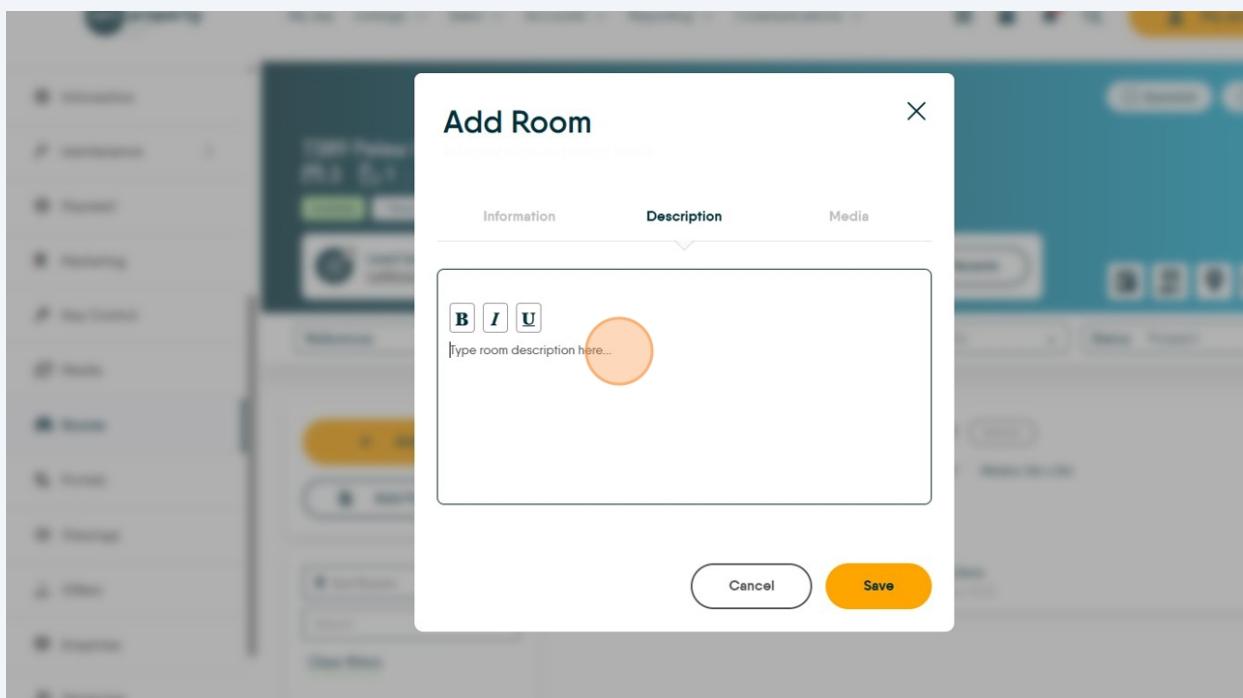
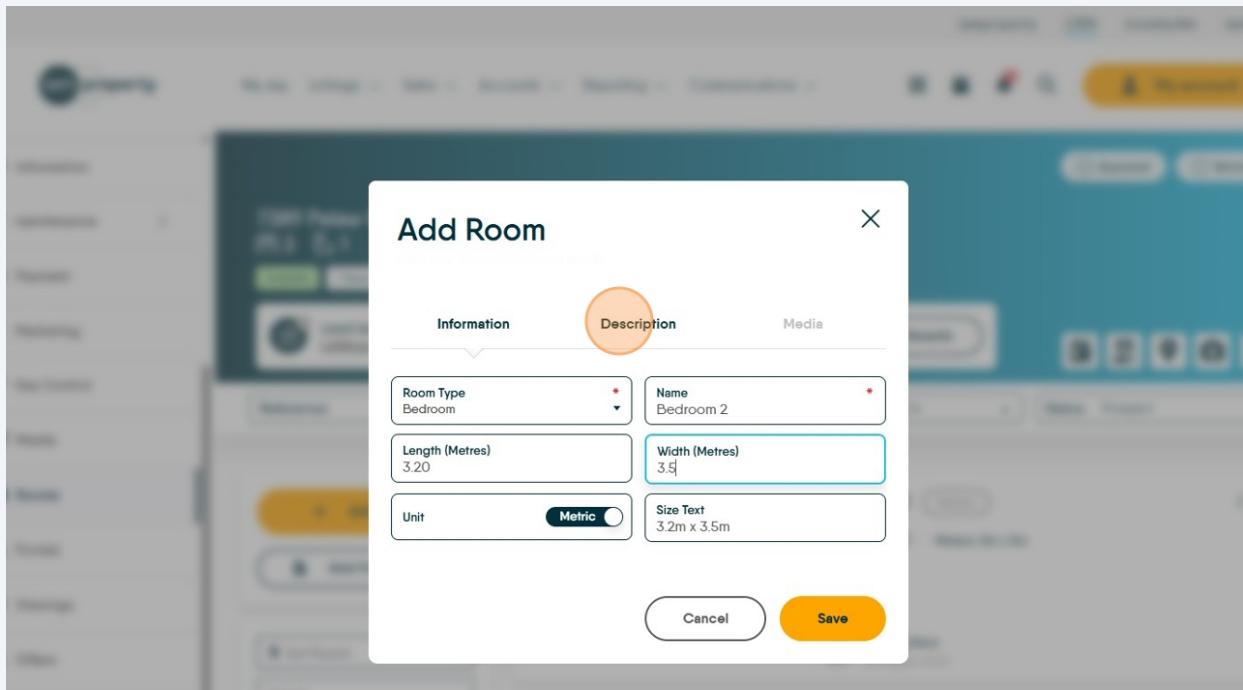
12 Click this text field and name the room



13 Click "Length (Metres)" and add the room size.

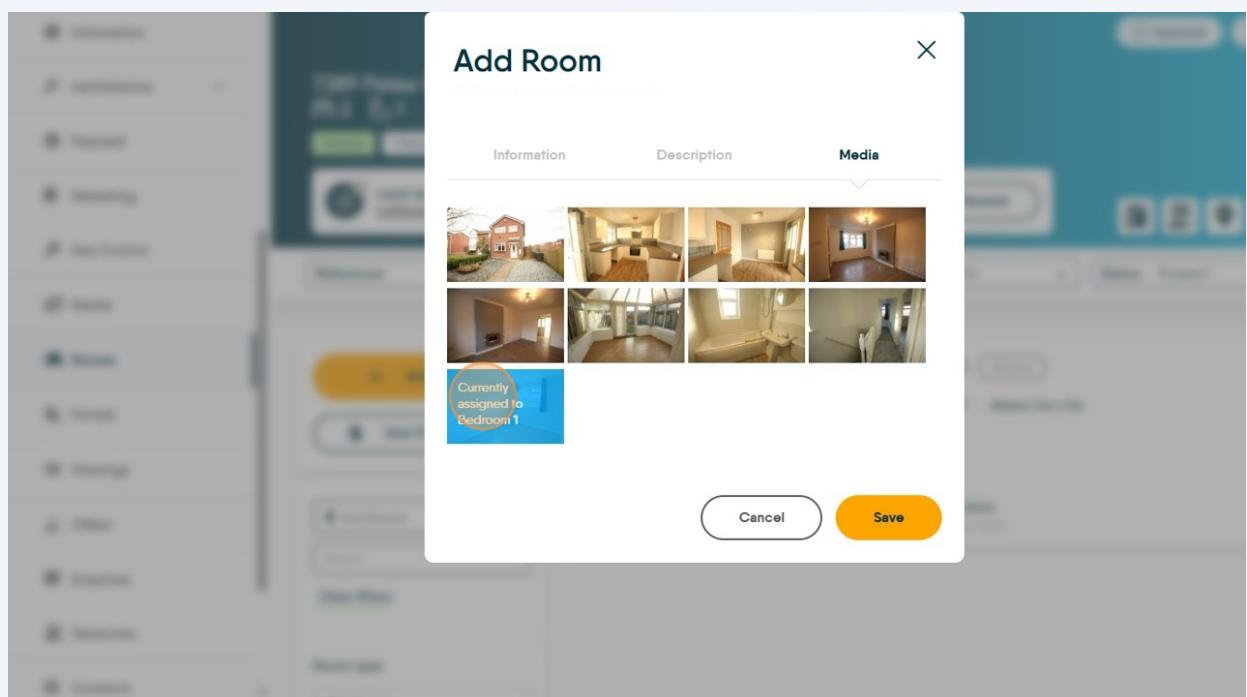
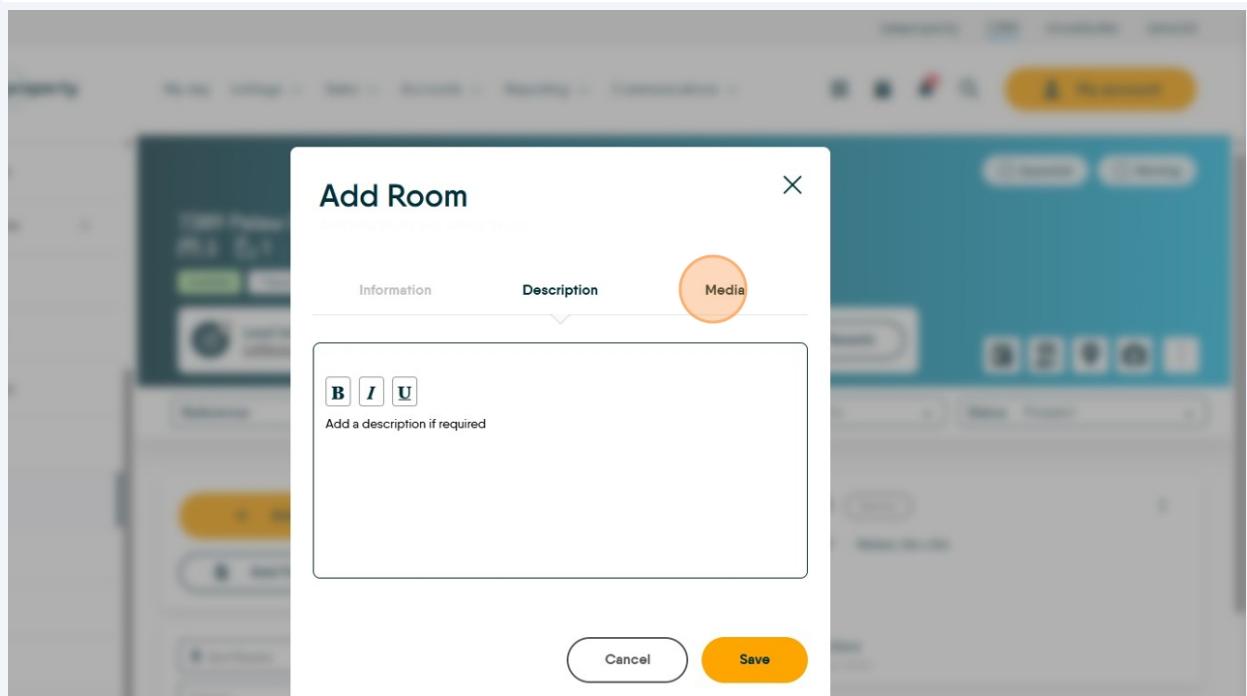


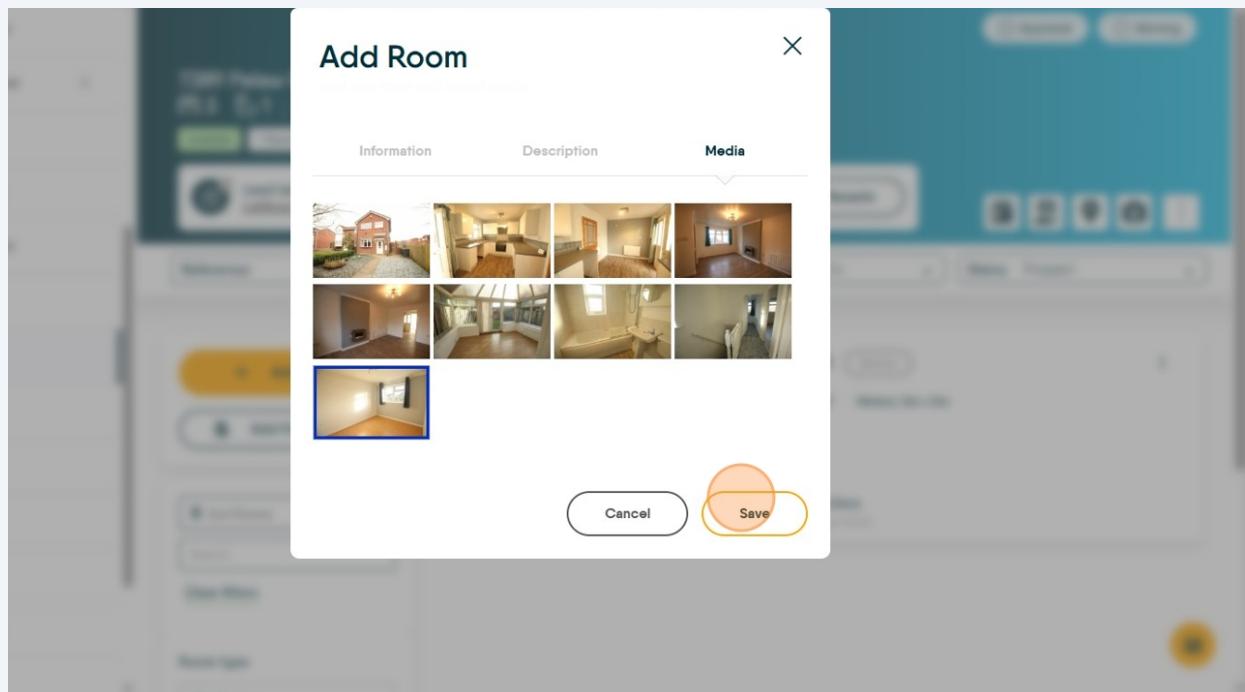
14 Click **"Description"** add the description in the screen.



15 Click **"Media"** from the next screen select the media you want to attach to this room, you can add multiple images. Images cannot be shared between rooms.

Click "Save"





16 Click to save the changes to the property record..

7389 Pelaw Crescent, Chester le Street, DH2 2HX |  
3 B1 | £1200.00 pcm

Available 1 Tenant

Lead landlord: Lettings Landlor... View Landlords

Lead tenant: Mr lettings applica... View Tenants

Reference: Negotiator: Training Dave Branch Morgan & Co Status Prospect

+ Add Room

Sort Rooms Search Clear filters Room type

Bedroom 1 Bedroom  
Feet: 0'0" x 0'0" Meters: 0m x 0m

TD Training Dave 26 August 2025

Bedroom 2 Bedroom  
Add a description if required  
Feet: 10'6" x 11'6" Meters: 3.2m x 3.5m

Save Changes

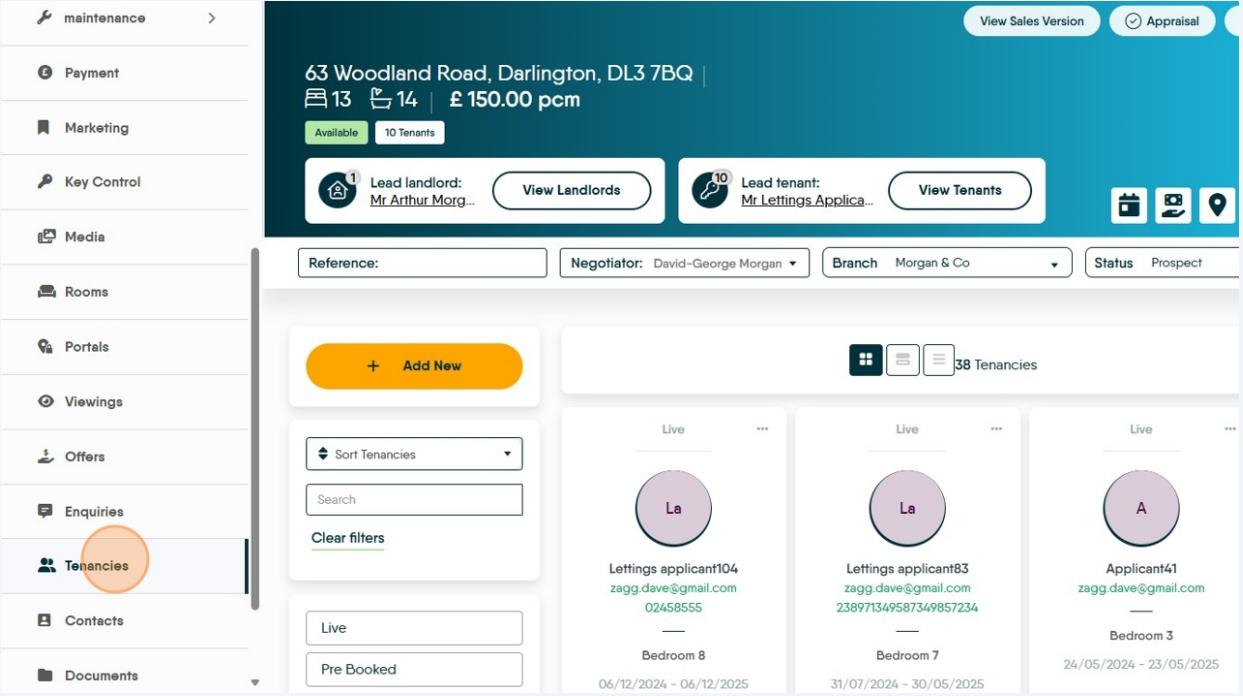
## Creating the 'Room' Tenancy

17

This guide shows creating the tenancy from the Property record, the process is similar if created from the Applicant screen.

18

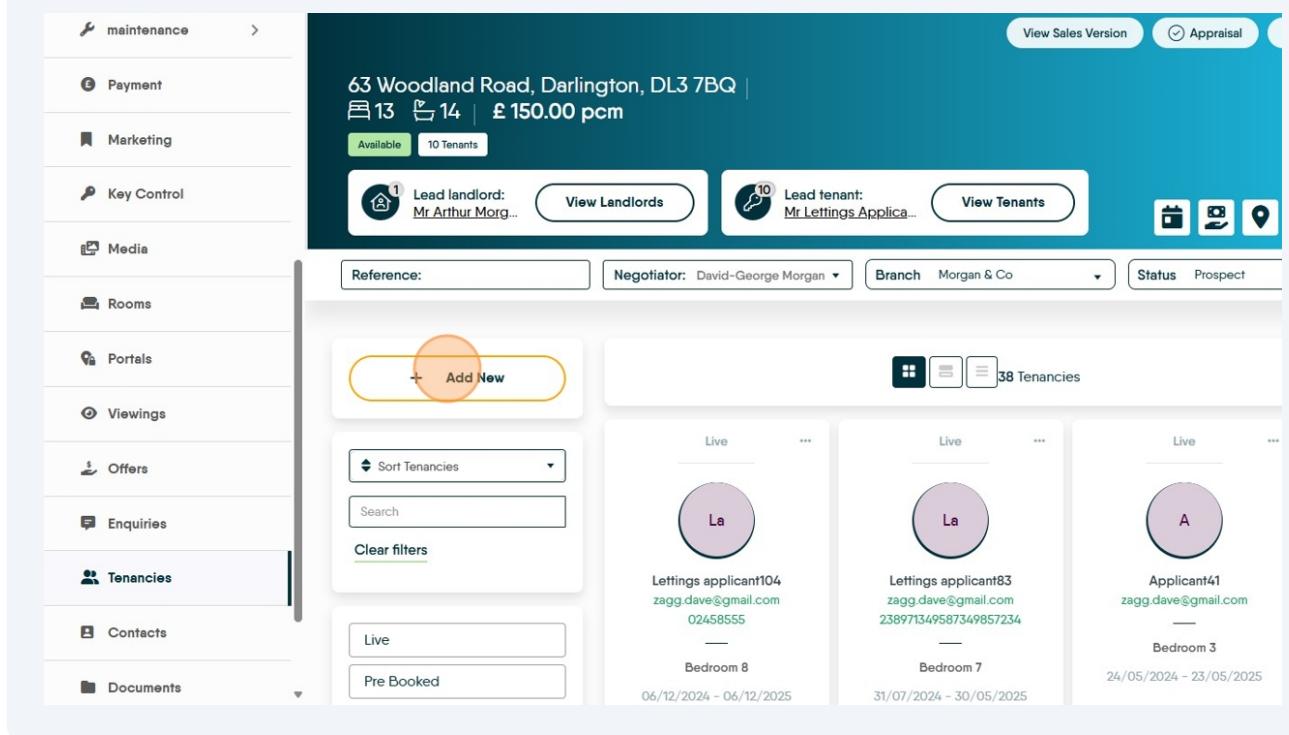
Click "Tenancies"



The screenshot shows the software's main interface for managing a property at 63 Woodland Road, Darlington, DL3 7BQ. The property is listed as available with 10 tenants. The left sidebar has a 'Tenancies' link highlighted with an orange circle. The main screen displays 38 tenancies, each with a lead tenant's initials (La or A) in a purple circle, the tenant's name, email, phone number, room type, and rental period. The interface includes filters for sorting, searching, and clearing filters, as well as buttons for adding new tenancies and viewing landlords and tenants.

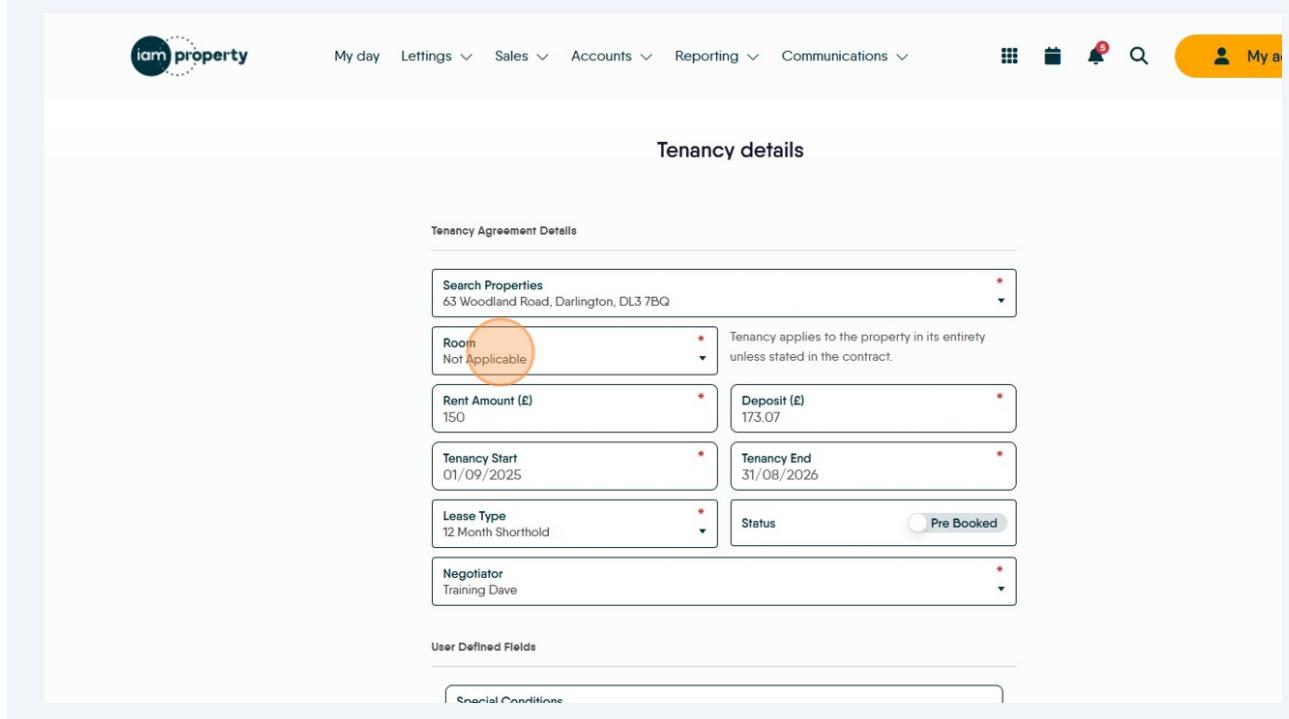
Lead Tenant	Tenant Details	Room Type	Rental Period
La	Lettings applicant104 zagg.dave@gmail.com 02458555	Bedroom 8	06/12/2024 - 06/12/2025
La	Lettings applicant83 zagg.dave@gmail.com 238971349587349857234	Bedroom 7	31/07/2024 - 30/05/2025
A	Applicant41 zagg.dave@gmail.com	Bedroom 3	24/05/2024 - 23/05/2025

19 Click "Add New"



The screenshot shows the 'Tenancies' section of a software interface. At the top, there is a property listing for '63 Woodland Road, Darlington, DL3 7BQ' with '13' and '14' units available at £150.00 pcm. Below the listing, there are buttons for 'View Landlords' and 'View Tenants'. The main area is titled 'Tenancies' and shows three live tenancies: 'Lettings applicant104' (Bedroom 8, 06/12/2024 - 06/12/2025), 'Lettings applicant83' (Bedroom 7, 31/07/2024 - 30/05/2025), and 'Applicant41' (Bedroom 3, 24/05/2024 - 23/05/2025). On the left, a sidebar lists various modules: maintenance, Payment, Marketing, Key Control, Media, Rooms, Portals, Viewings, Offers, Enquiries, Tenancies (which is selected and highlighted in blue), Contacts, and Documents. The 'Tenancies' module is expanded, showing sub-options for 'Live' and 'Pre Booked'.

20 From the next screen. Click "Room"



The screenshot shows the 'Tenancy details' screen in the iam property software. At the top, there is a navigation bar with 'My day', 'Lettings', 'Sales', 'Accounts', 'Reporting', 'Communications', and a user profile. Below the navigation, the title 'Tenancy details' is displayed. The main form is titled 'Tenancy Agreement Details' and contains the following fields:

- Search Properties: 63 Woodland Road, Darlington, DL3 7BQ
- Room: Not Applicable (highlighted with an orange circle)
- Rent Amount (£): 150
- Deposit (£): 173.07
- Tenancy Start: 01/09/2025
- Tenancy End: 31/08/2026
- Lease Type: 12 Month Shorthold
- Status: Pre Booked
- Negotiator: Training Dave

Below the main form, there are sections for 'User Defined Fields' and 'Special Conditions'.

21

From the list of rooms select the room you are renting. The rooms will show with their current status - Pre Booked or 'Occupied' i.e. has a live tenancy.  
Click "**Bedroom 9**"

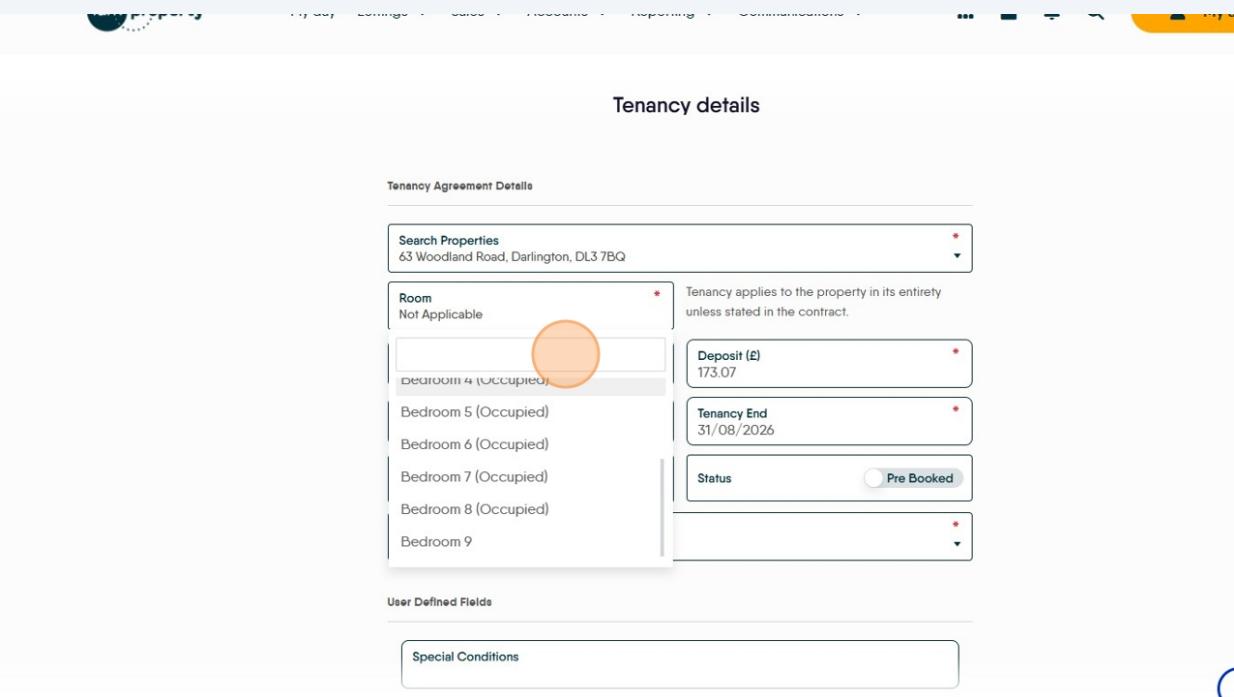
**Tenancy details**

**Tenancy Agreement Details**

Search Properties 63 Woodland Road, Darlington, DL3 7BQ	Tenancy applies to the property in its entirety unless stated in the contract.
Room Not Applicable	Deposit (£) 173.07
Bedroom 4 (Occupied)	Tenancy End 31/08/2026
Bedroom 5 (Occupied)	Status <input checked="" type="radio"/> Pre Booked
Bedroom 6 (Occupied)	
Bedroom 7 (Occupied)	
Bedroom 8 (Occupied)	
Bedroom 9	

**User Defined Fields**

Special Conditions



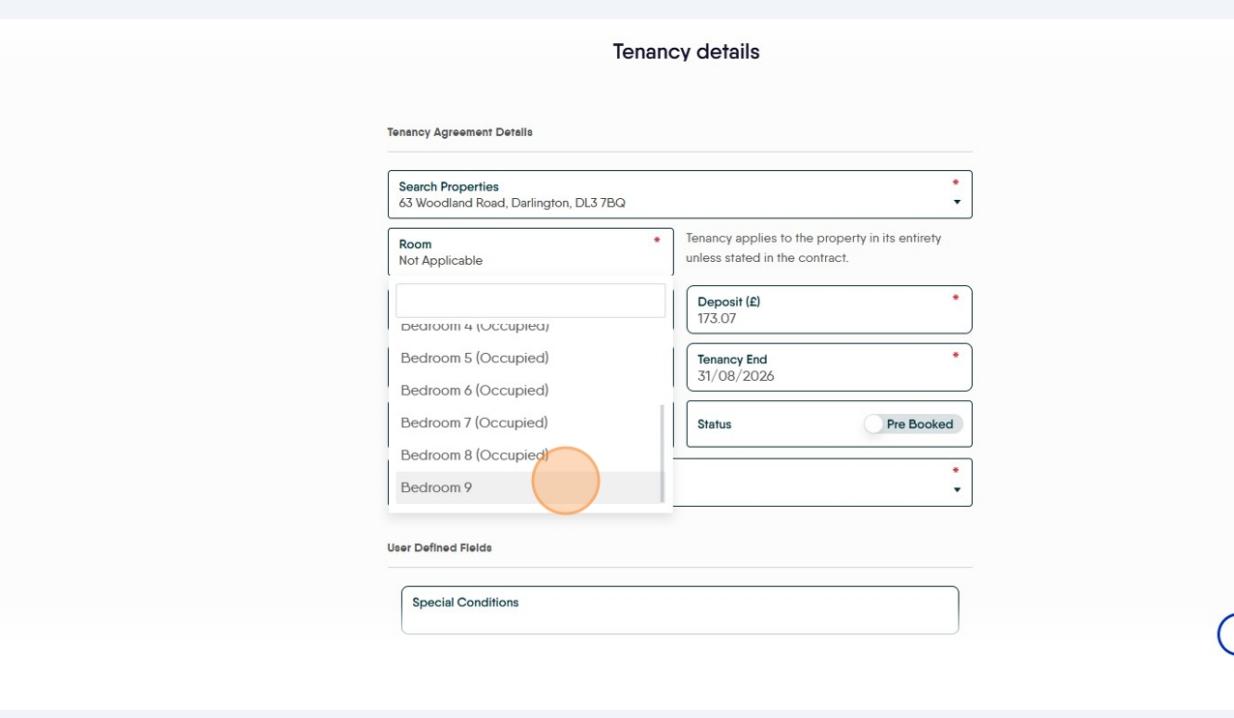
**Tenancy details**

**Tenancy Agreement Details**

Search Properties 63 Woodland Road, Darlington, DL3 7BQ	Tenancy applies to the property in its entirety unless stated in the contract.
Room Not Applicable	Deposit (£) 173.07
Bedroom 4 (Occupied)	Tenancy End 31/08/2026
Bedroom 5 (Occupied)	Status <input checked="" type="radio"/> Pre Booked
Bedroom 6 (Occupied)	
Bedroom 7 (Occupied)	
Bedroom 8 (Occupied)	
Bedroom 9	

**User Defined Fields**

Special Conditions



22

Scroll down the screen and check the details are correct for the rent, tenancy start date etc.

Tenancy details 1

Tenancy Agreement Details

Search Properties  
63 Woodland Road, Darlington, DL3 7BQ

Room  
Bedroom 9

Rent Amount (£)  
150

Deposit (£)  
173.07

Tenancy Start  
01/09/2025

Tenancy End  
31/08/2026

Lease Type  
12 Month Shorthold

Status  
Pre Booked

Negotiator  
Training Dave

User Defined Fields

Special Conditions

Continue

23

Click "Continue"

Tenancy details 1/2

Tenancy Agreement Details

Search Properties  
63 Woodland Road, Darlington, DL3 7BQ

Room  
Bedroom 9

Rent Amount (£)  
150

Deposit (£)  
173.07

Tenancy Start  
01/09/2025

Tenancy End  
31/08/2026

Lease Type  
12 Month Shorthold

Status  
Pre Booked

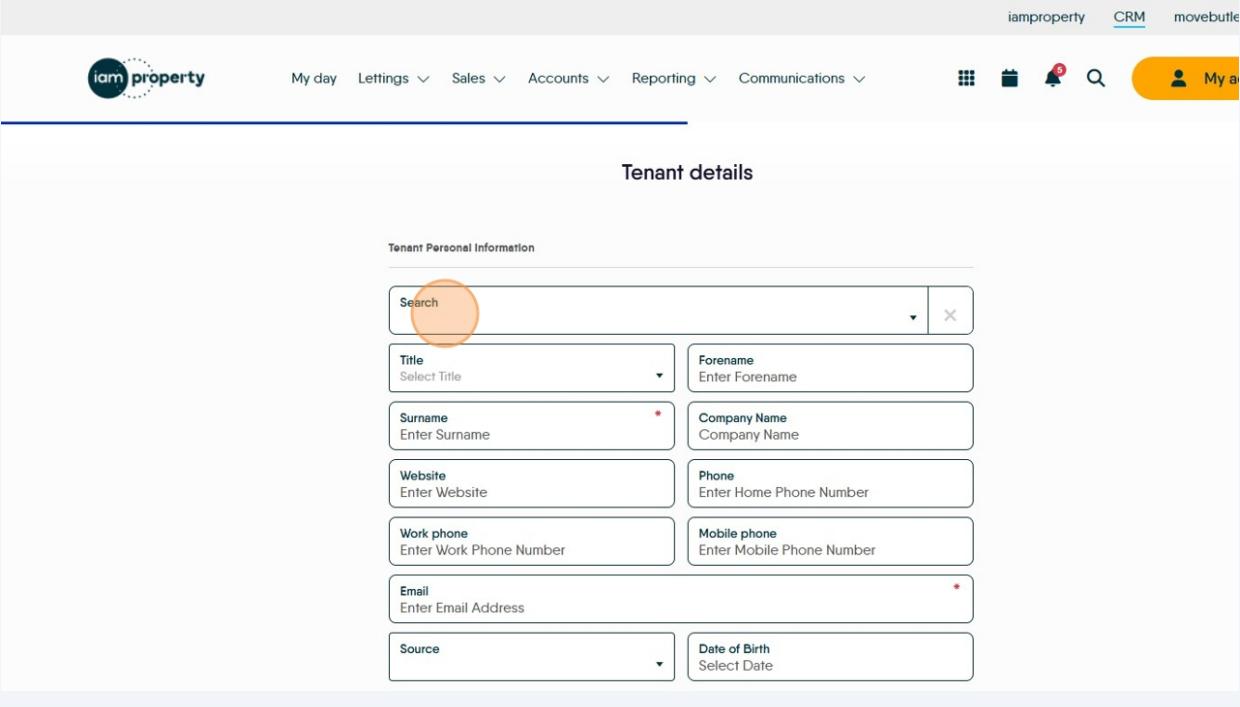
Negotiator  
Training Dave

User Defined Fields

Special Conditions

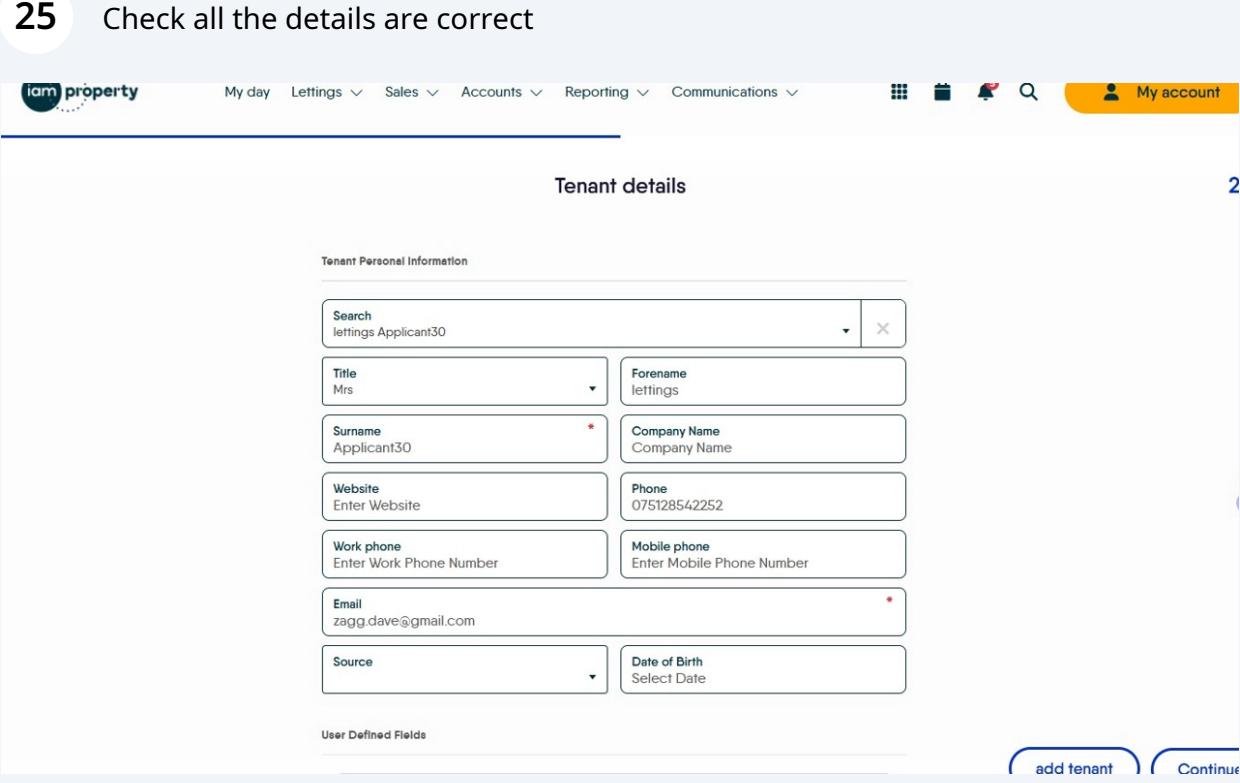
Continue  
or press ENTER

24 Click here and search for, or add the new tenant.



The screenshot shows the 'Tenant details' form in the CRM. The 'Search' field is highlighted with an orange circle. The form includes fields for Title, Surname, Forename, Company Name, Website, Phone, Work phone, Mobile phone, Email, and Date of Birth. There are also dropdowns for Source and Date of Birth.

25 Check all the details are correct

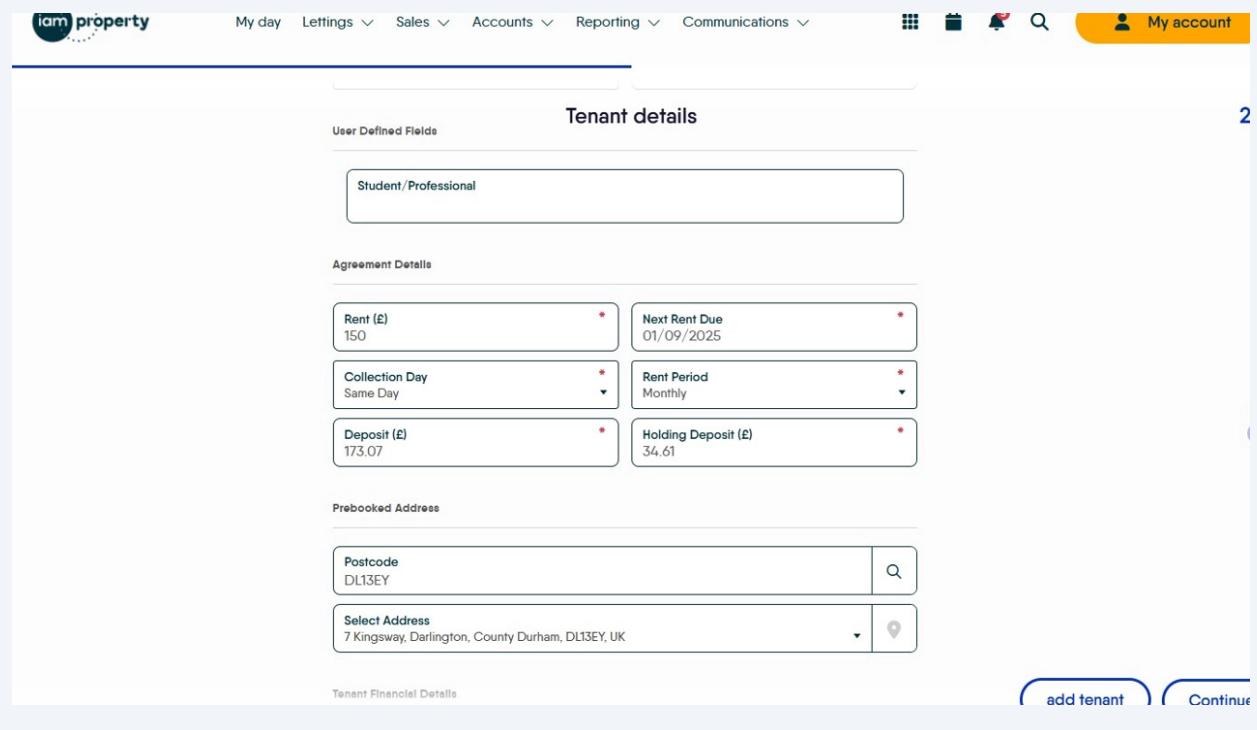


The screenshot shows the 'Tenant details' form with the following data entered:

Tenant Personal Information	
Search	lettings Applicant30
Title	Mrs
Surname	Applicant30
Website	Enter Website
Work phone	Enter Work Phone Number
Email	zagg.dave@gmail.com
Source	Select Date
Forename	lettings
Company Name	Company Name
Phone	075128542252
Mobile phone	Enter Mobile Phone Number
Date of Birth	Select Date

At the bottom, there are buttons for 'User Defined Fields', 'add tenant', and 'Continue'.

26 Check the "Rent" and the "Holding Deposit" field. Edit as required.



Tenant details

User Defined Fields

2

Student/Professional

Agreement Details

Rent (£) 150	Next Rent Due 01/09/2025
Collection Day Same Day	Rent Period Monthly
Deposit (£) 173.07	Holding Deposit (£) 34.61

Prebooked Address

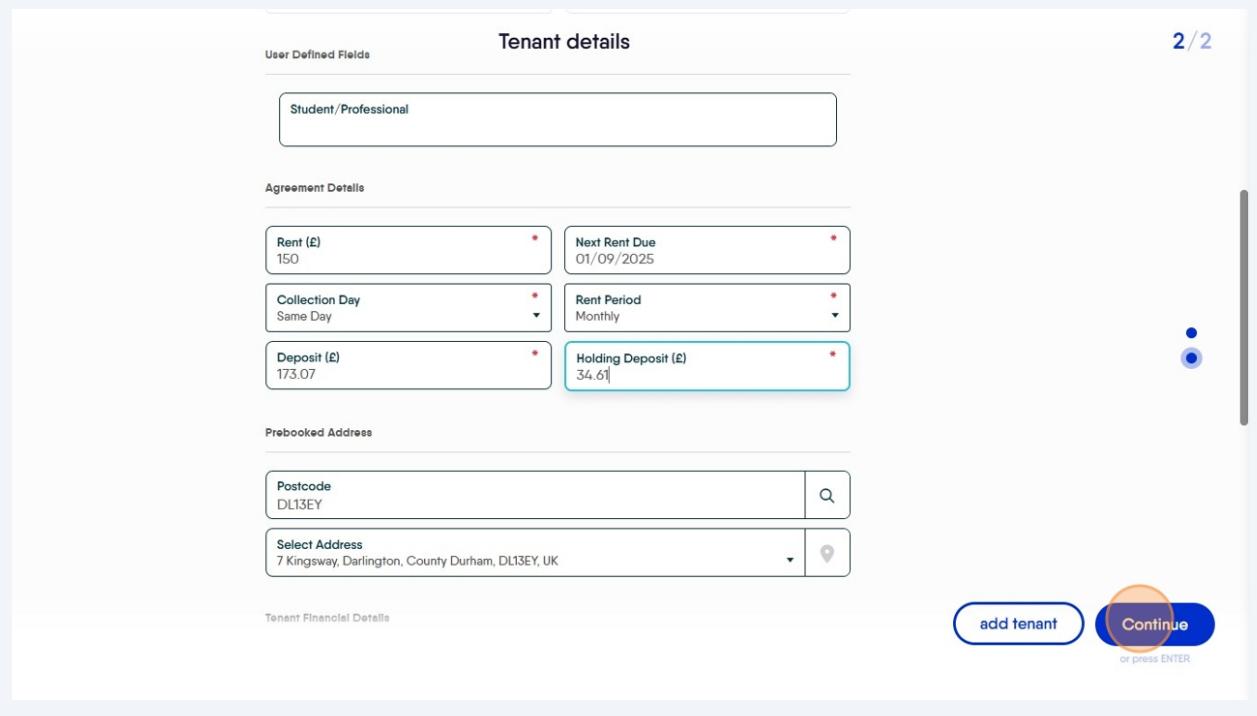
Postcode  
DL13EY

Select Address  
7 Kingsway, Darlington, County Durham, DL13EY, UK

Tenant Financial Details

add tenant Continue

27 Click "Continue"



Tenant details

User Defined Fields

2/2

Student/Professional

Agreement Details

Rent (£) 150	Next Rent Due 01/09/2025
Collection Day Same Day	Rent Period Monthly
Deposit (£) 173.07	Holding Deposit (£) 34.61

Prebooked Address

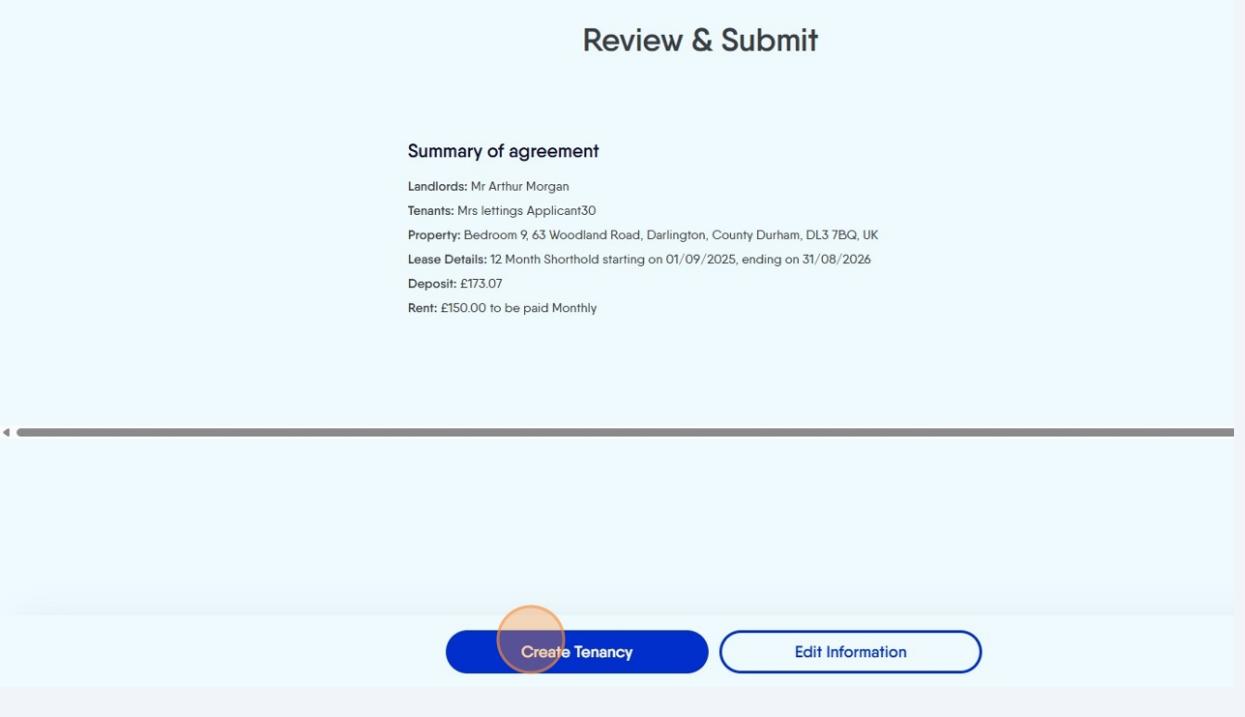
Postcode  
DL13EY

Select Address  
7 Kingsway, Darlington, County Durham, DL13EY, UK

Tenant Financial Details

add tenant Continue  
or press ENTER

28 Click "Create Tenancy"



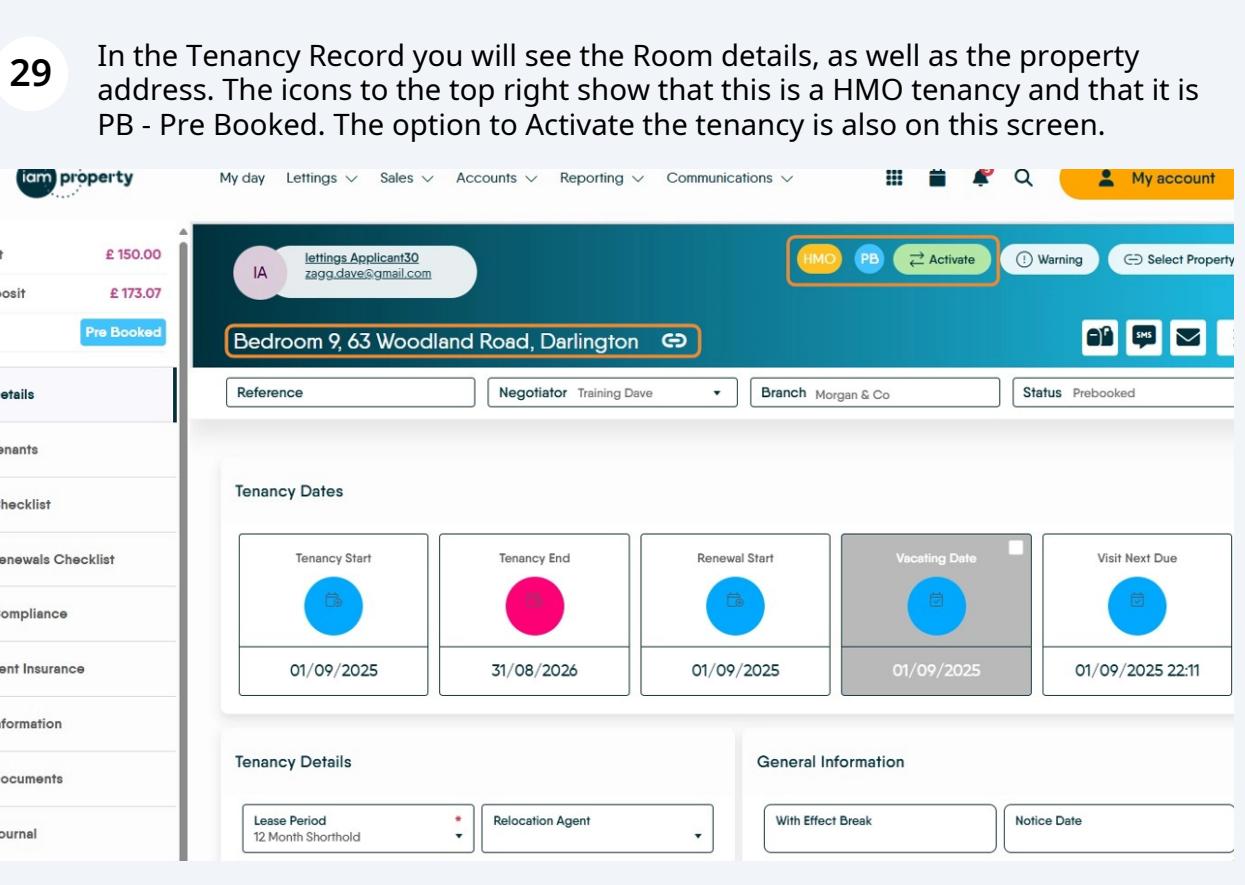
Review & Submit

**Summary of agreement**

Landlords: Mr Arthur Morgan  
Tenants: Mrs lettings Applicant30  
Property: Bedroom 9, 63 Woodland Road, Darlington, County Durham, DL3 7BQ, UK  
Lease Details: 12 Month Shorthold starting on 01/09/2025, ending on 31/08/2026  
Deposit: £173.07  
Rent: £150.00 to be paid Monthly

**Create Tenancy** **Edit Information**

29 In the Tenancy Record you will see the Room details, as well as the property address. The icons to the top right show that this is a HMO tenancy and that it is PB - Pre Booked. The option to Activate the tenancy is also on this screen.



iam property

My day Lettings Sales Accounts Reporting Communications

IA lettings Applicant30 zagg.dave@gmail.com HMO PB Activate Warning Select Property

Deposit £ 173.07

Pre Booked

Bedroom 9, 63 Woodland Road, Darlington

Reference Negotiator Training Dave Branch Morgan & Co Status Prebooked

**Tenancy Dates**

Tenancy Start	Tenancy End	Renewal Start	Vacating Date	Visit Next Due
01/09/2025	31/08/2026	01/09/2025	01/09/2025	01/09/2025 22:11

**Tenancy Details**

Lease Period: 12 Month Shorthold

**General Information**

With Effect Break Notice Date

Details  
Tenants  
Checklist  
Renewals Checklist  
Compliance  
Tenancy Insurance  
Information  
Documents  
Journal