

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

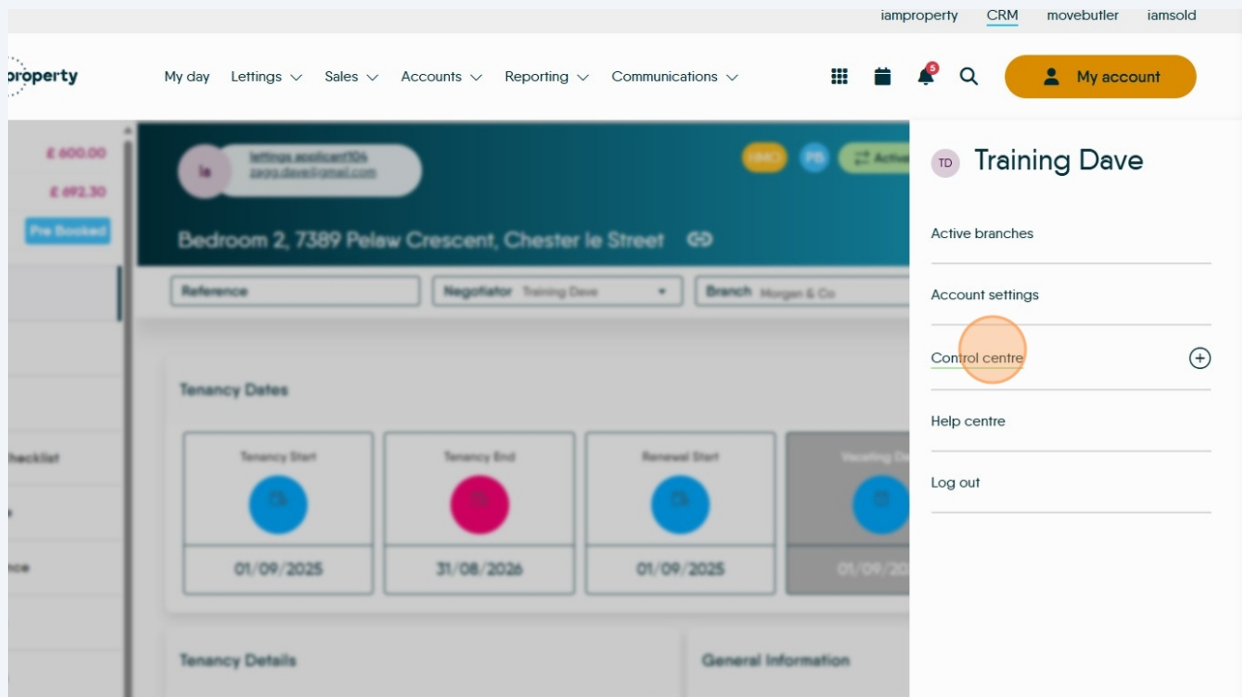
1 Once enabled on your CRM. Click **"My account"**

The screenshot displays the 'My account' page in the iamproperty CRM. The top navigation bar includes 'iamproperty', 'CRM', 'movebutler', and 'iamsold'. The main header shows 'My day', 'Lettings', 'Sales', 'Accounts', 'Reporting', and 'Communications'. A 'My account' button is highlighted in the top right. The main content area shows a tenant profile for 'lettings_applicant104' with email 'zagg.dave@gmail.com'. Below this, the property address 'Bedroom 2, 7389 Pelaw Crescent, Chester le Street' is displayed. A 'Pre Booked' status is shown. The 'Tenancy Dates' section includes a table with the following data:

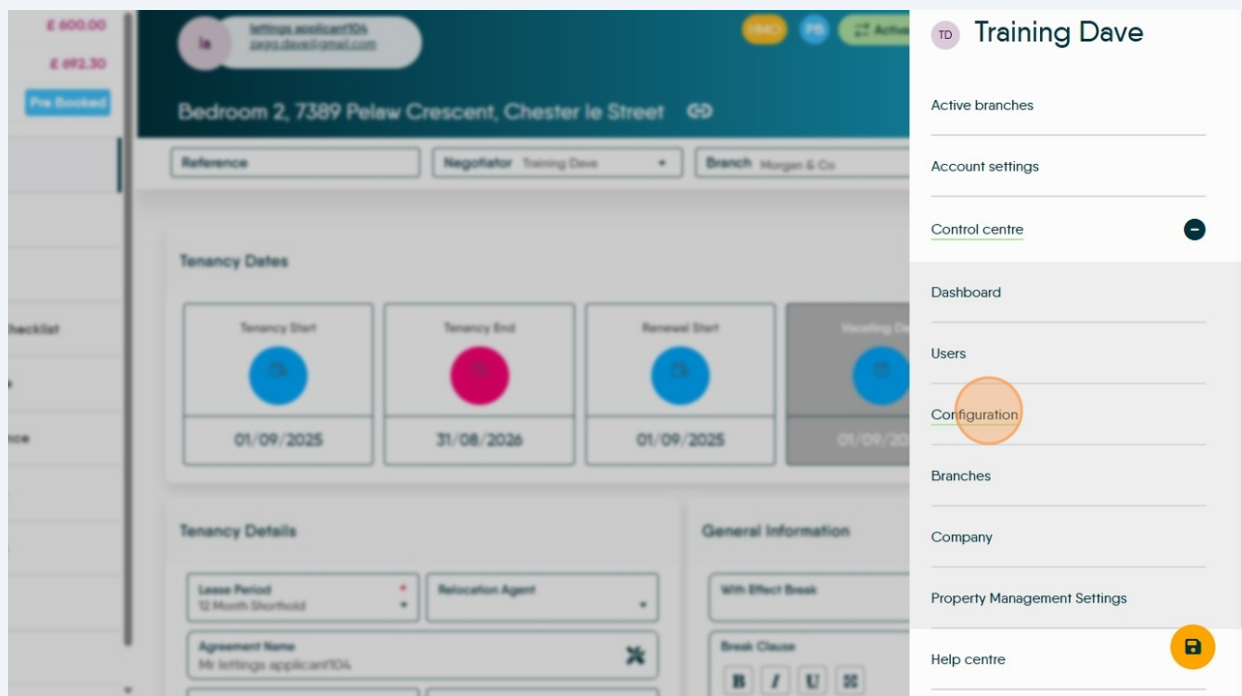
Tenancy Start	Tenancy End	Renewal Start	Vacating Date	Visit Next Due
01/09/2025	31/08/2026	01/09/2025	01/09/2025	01/09/2025 15:13

Below the table, there are sections for 'Tenancy Details' and 'General Information'.

2 Click "Control centre"



3 Click "Configuration"



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

General settings

Gdpr - contact preferences

<input checked="" type="checkbox"/> Use Defaults	<input type="checkbox"/> Do Not Contact
<input checked="" type="checkbox"/> Email	<input checked="" type="checkbox"/> Letter
<input checked="" type="checkbox"/> SMS	<input checked="" type="checkbox"/> Phone
<input type="checkbox"/> Third Party	<input checked="" type="checkbox"/> Allow Marketing

Applicant matching defaults

<input checked="" type="checkbox"/> Matching Area

Landlord portal

<input type="checkbox"/> Restrict Landlord Portal

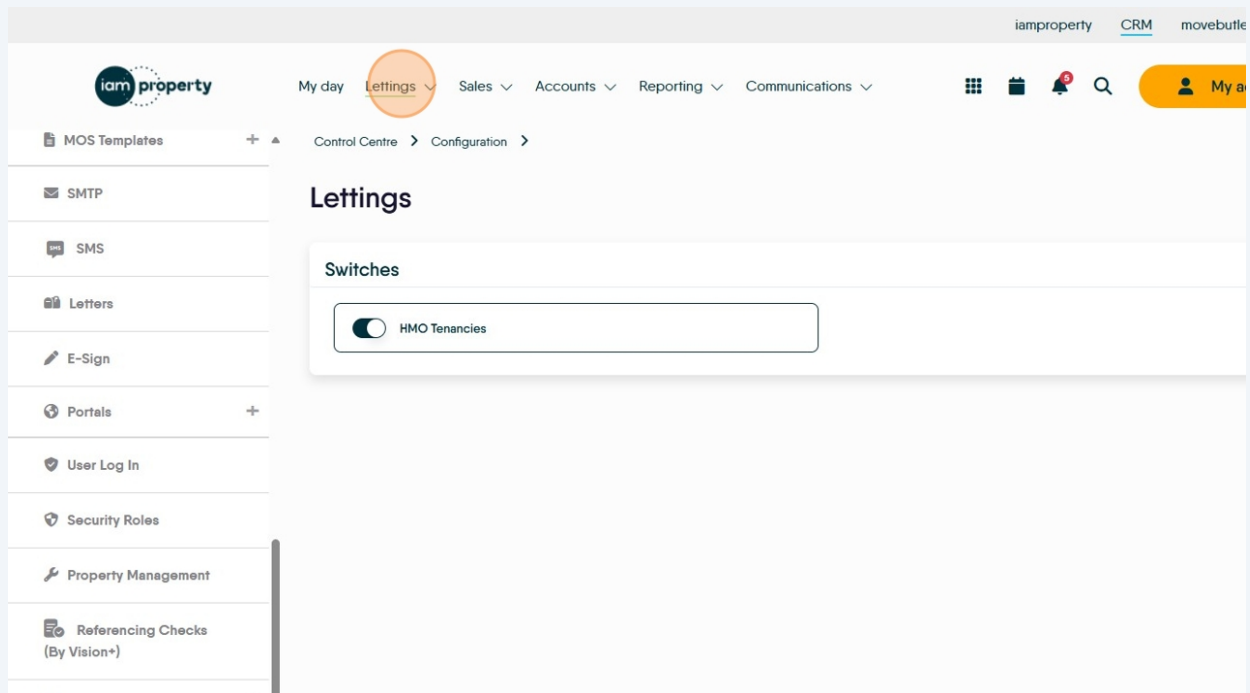
5 Click here to enable the **"HMO Tenancies"** option.

Lettings

Switches

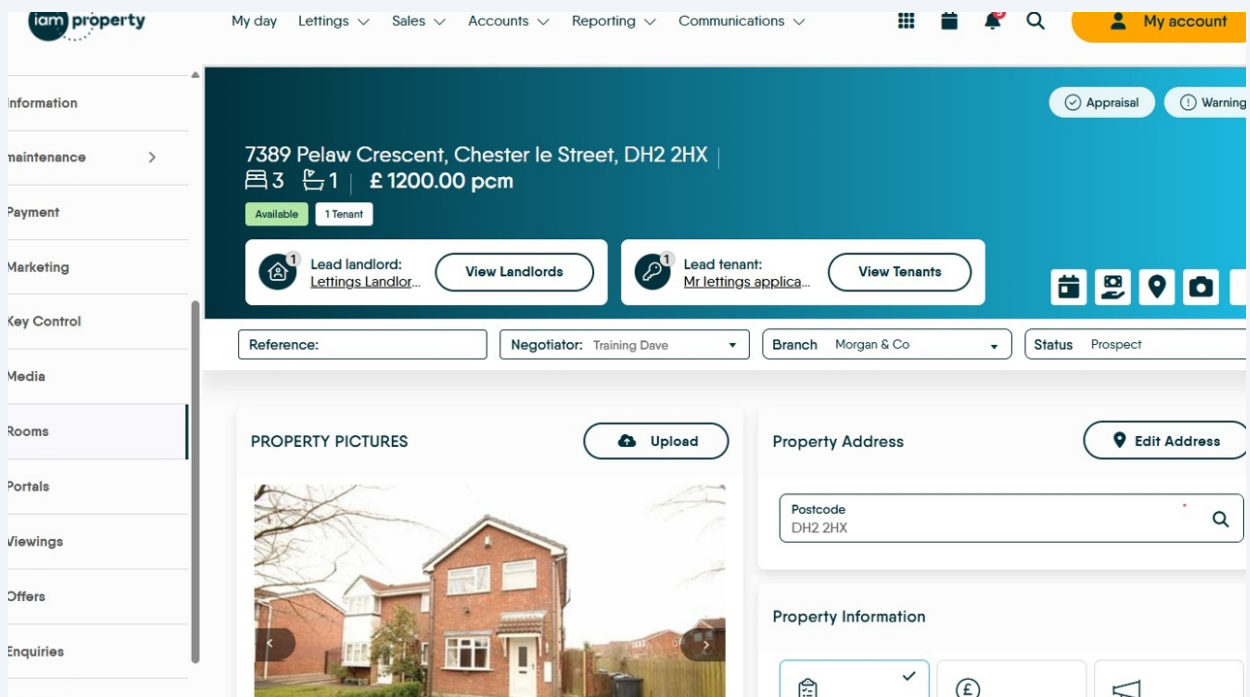
<input checked="" type="checkbox"/> HMO Tenancies

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



Creating the HMO Tenancy

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



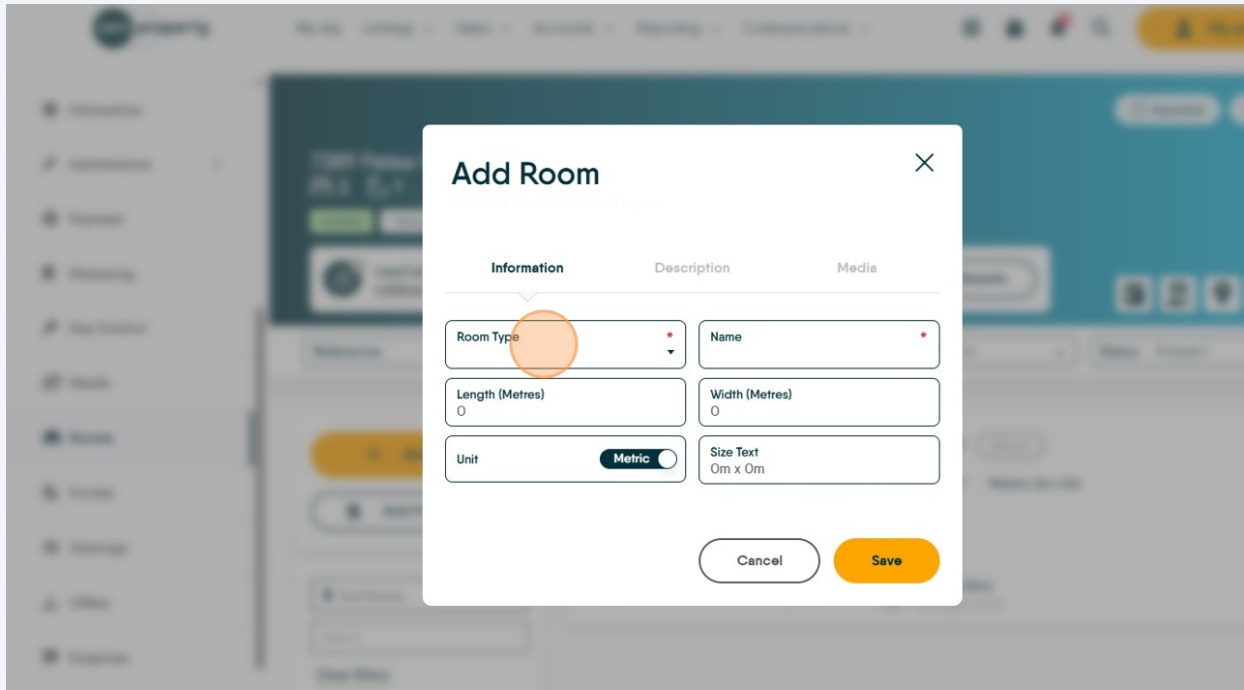
8 Scroll down the left menu and click "Rooms"

The screenshot shows a property management dashboard. On the left, a vertical menu lists various sections: Information, maintenance, Payment, Marketing, Key Control, Media, **Rooms** (highlighted with an orange circle), Portals, Viewings, Offers, Enquiries, Tenancies, and Contacts. The main content area displays property details for '7389 Pelaw Crescent, Chester le Street, DH2 2HX'. It includes a status bar with 'Available' and '1 Tenant', and buttons for 'View Landlords' and 'View Tenants'. Below this, there are filters for Reference, Negotiator (Training Dave), Branch (Morgan & Co), and Status (Prospect). The 'PROPERTY PICTURES' section shows a photo of the property with an 'Upload' button. To the right, the 'Property Address' section shows the postcode 'DH2 2HX' and an 'Edit Address' button. The 'Property Information' section includes three cards: 'Fully managed' (checked), 'Rent collect' (We collect rent for this property), and 'Let only' (We only let property).

9 Click "Add Room"

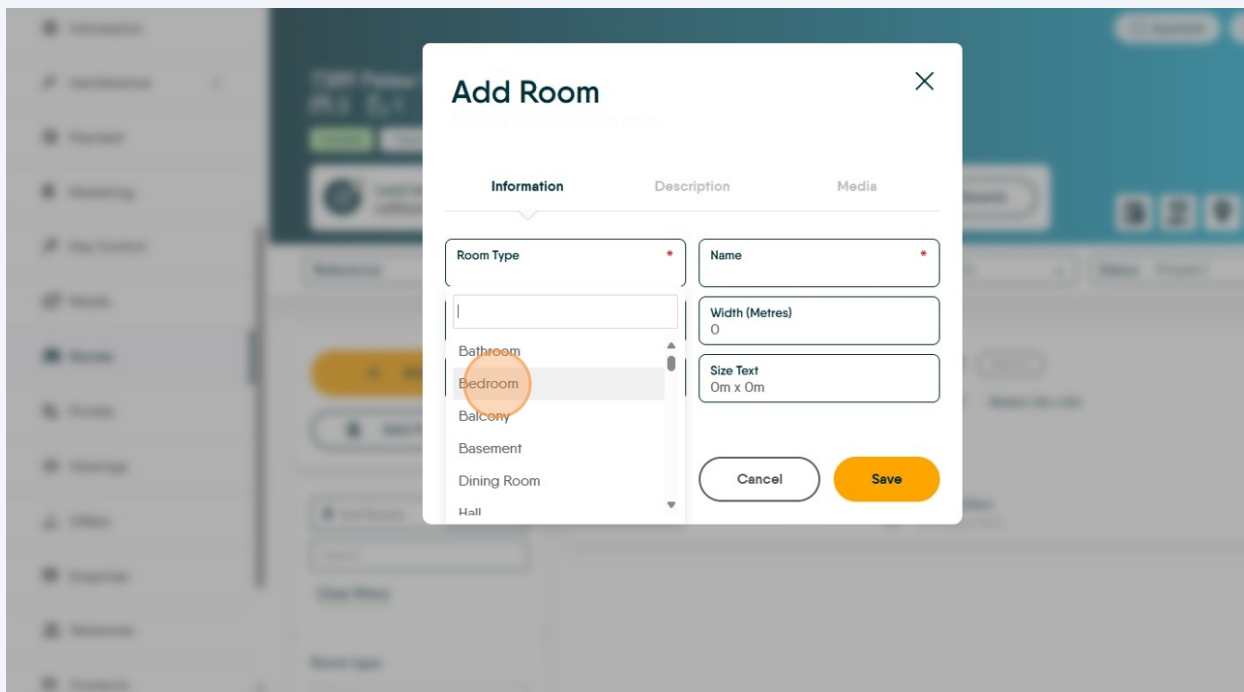
The screenshot shows the same property management dashboard, but now the 'Rooms' section is selected in the left menu. The main content area displays the 'Add Room' button, which is highlighted with an orange circle. Below it is the 'Add From PlanUp' button. A search bar with 'Sort Rooms' and 'Clear filters' is visible. The 'Room type' dropdown is also shown. The 'Bedroom 1' card is displayed, showing a photo of the room, its dimensions (Feet: 0'0" x 0'0" | Meters: 0m x 0m), and the date '26 August 2025'.

10 Click here.



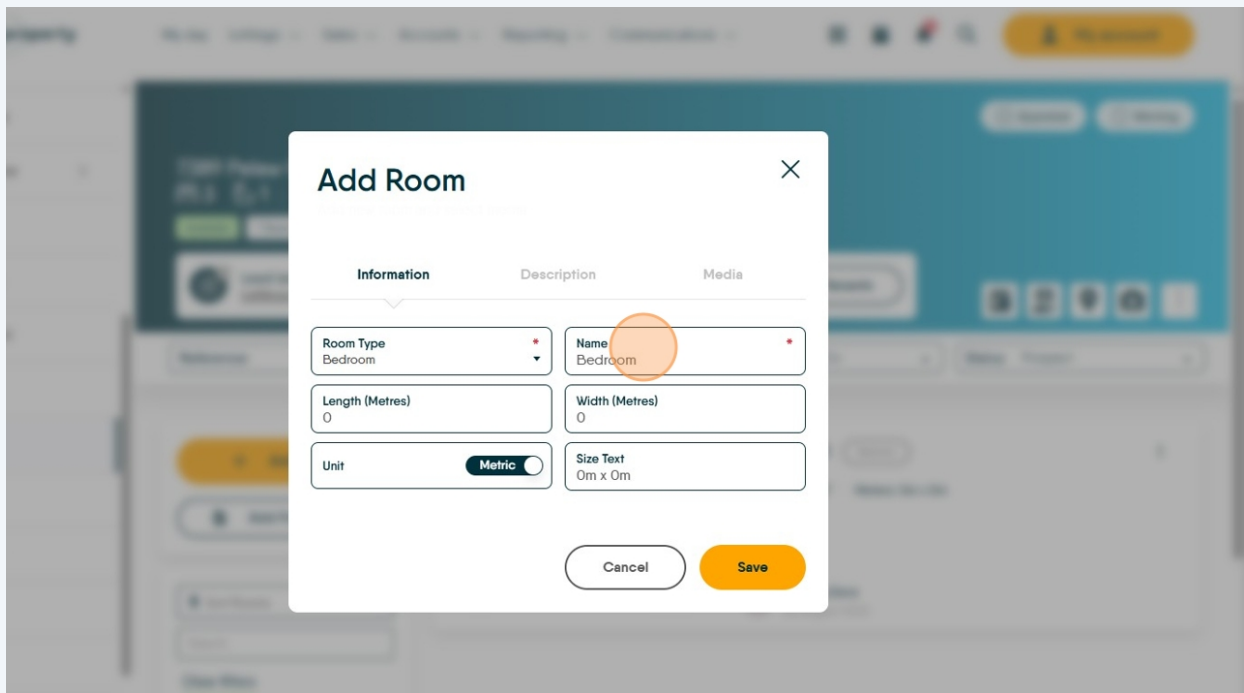
The screenshot shows a web application interface with a sidebar on the left and a main content area. A modal window titled "Add Room" is open in the center. The modal has three tabs: "Information", "Description", and "Media". The "Information" tab is active. It contains several input fields: "Room Type" (a dropdown menu with a red asterisk), "Name" (a text input with a red asterisk), "Length (Metres)" (a text input with "0" inside), "Width (Metres)" (a text input with "0" inside), "Unit" (a toggle switch labeled "Metric" which is currently turned on), and "Size Text" (a text input with "0m x 0m" inside). At the bottom of the modal are two buttons: "Cancel" and "Save". An orange circle highlights the "Room Type" dropdown menu.

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



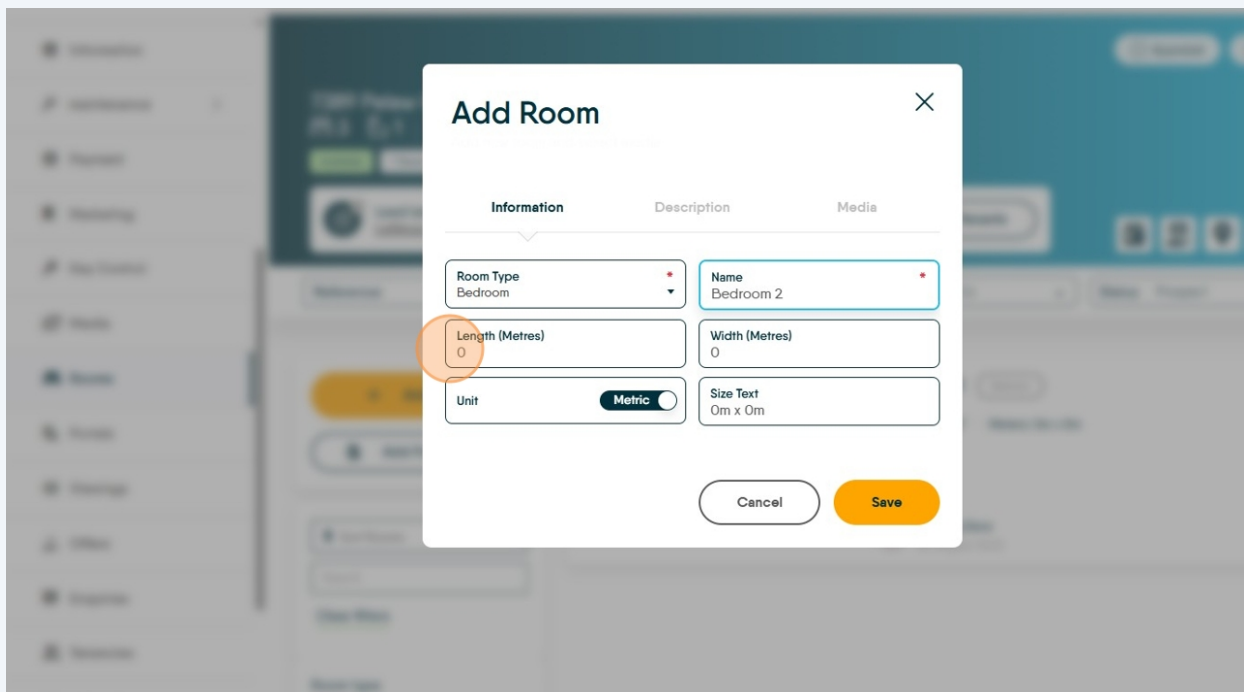
This screenshot shows the same "Add Room" modal form as in the previous image, but with the "Room Type" dropdown menu open. The dropdown list displays several room types: "Bathroom", "Bedroom", "Balcony", "Basement", "Dining Room", and "Hall". The "Bedroom" option is highlighted with an orange circle, indicating it is the selected or recommended choice. The rest of the modal form, including the "Name", "Length", "Width", "Unit", "Size Text" fields and the "Cancel" and "Save" buttons, remains the same.

- 12 Click this text field and name the room



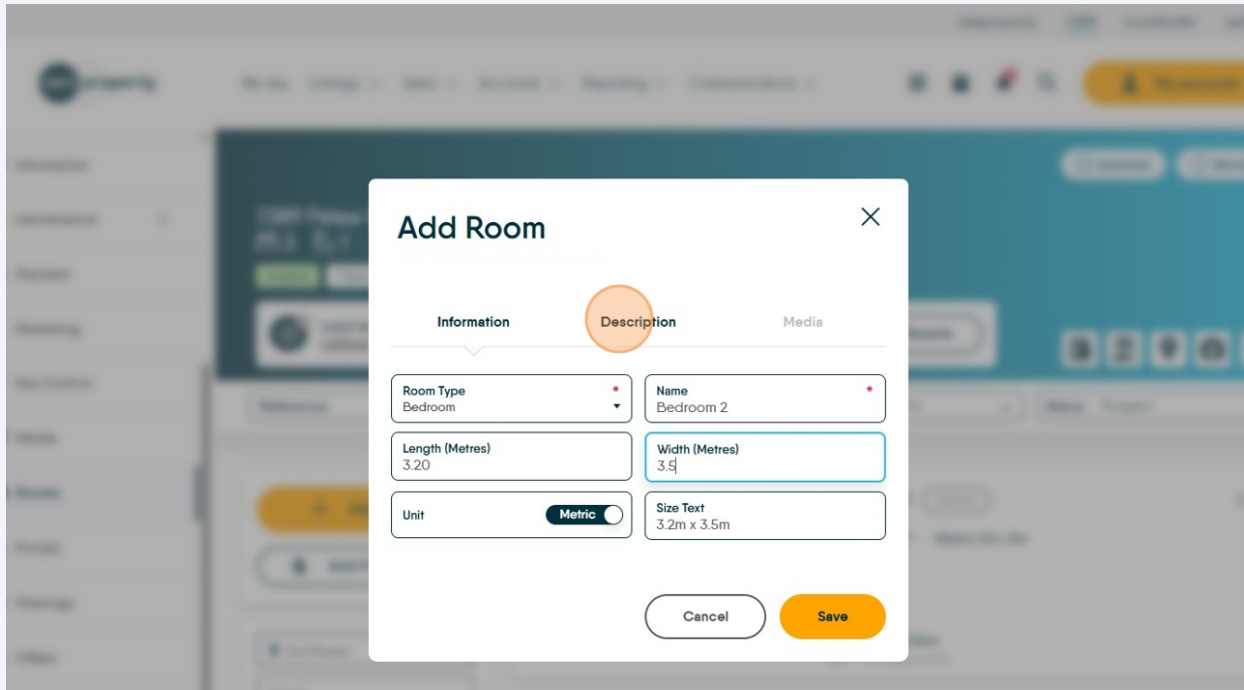
The screenshot shows a web application interface with a modal dialog titled "Add Room". The dialog has three tabs: "Information", "Description", and "Media". The "Information" tab is active. It contains several input fields: "Room Type" (a dropdown menu with "Bedroom" selected), "Name" (a text field with "Bedroom" entered), "Length (Metres)" (a text field with "0" entered), "Width (Metres)" (a text field with "0" entered), "Unit" (a toggle switch labeled "Metric" which is turned on), and "Size Text" (a text field with "0m x 0m" entered). At the bottom of the dialog are "Cancel" and "Save" buttons. An orange circle highlights the "Name" text field.

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

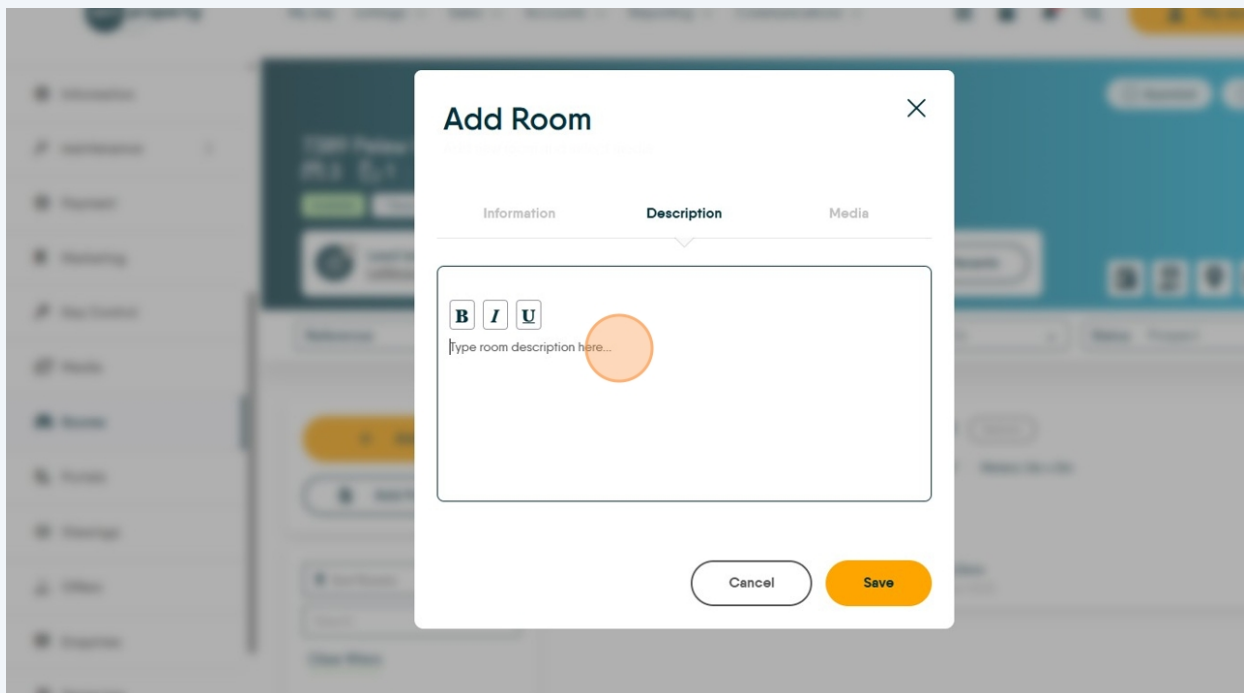


This screenshot shows the same "Add Room" dialog box as the previous one, but with the "Name" field now containing "Bedroom 2". An orange circle highlights the "Length (Metres)" text field, which currently contains the value "0". The "Unit" toggle switch remains turned on to "Metric". The "Cancel" and "Save" buttons are still at the bottom.

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

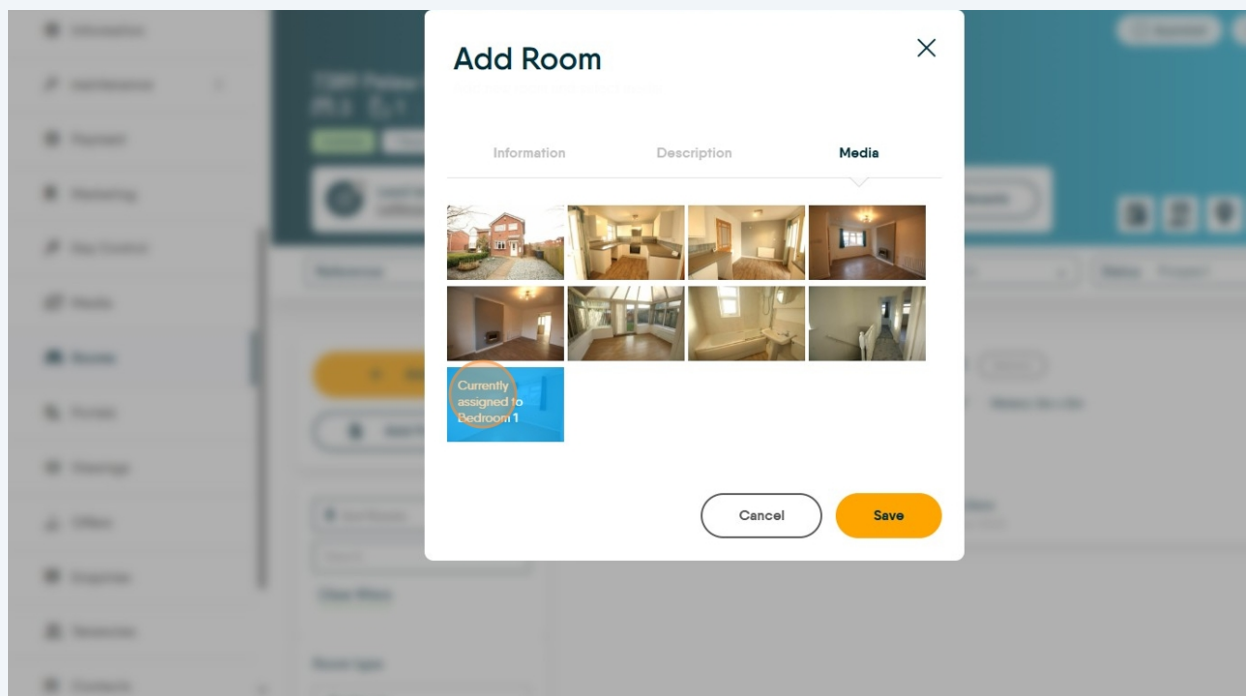
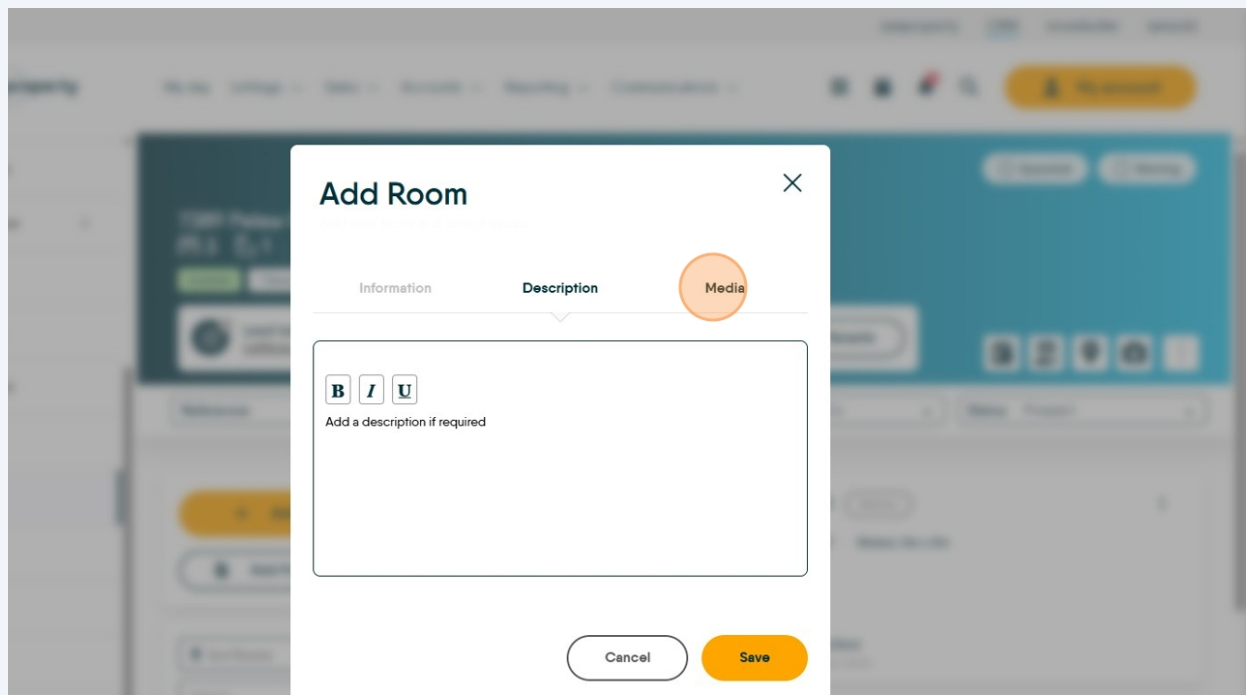


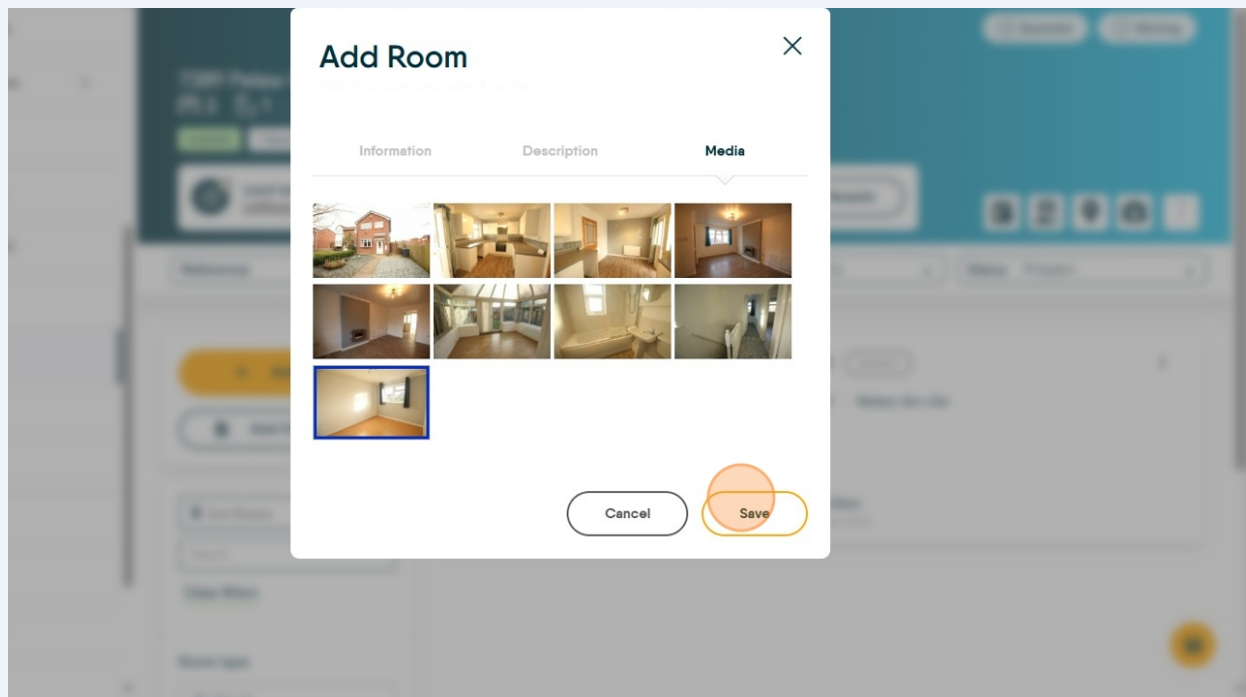
The screenshot shows the 'Add Room' dialog box with the 'Description' tab selected. The dialog has three tabs: 'Information', 'Description', and 'Media'. The 'Description' tab is active, showing a text area for the room description. The text area contains the placeholder text 'type room description here...' and is highlighted with an orange circle. The dialog also includes fields for 'Room Type' (Bedroom), 'Name' (Bedroom 2), 'Length (Metres)' (3.20), 'Width (Metres)' (3.5), and 'Size Text' (3.2m x 3.5m). The 'Unit' is set to 'Metric'. The 'Cancel' and 'Save' buttons are at the bottom.



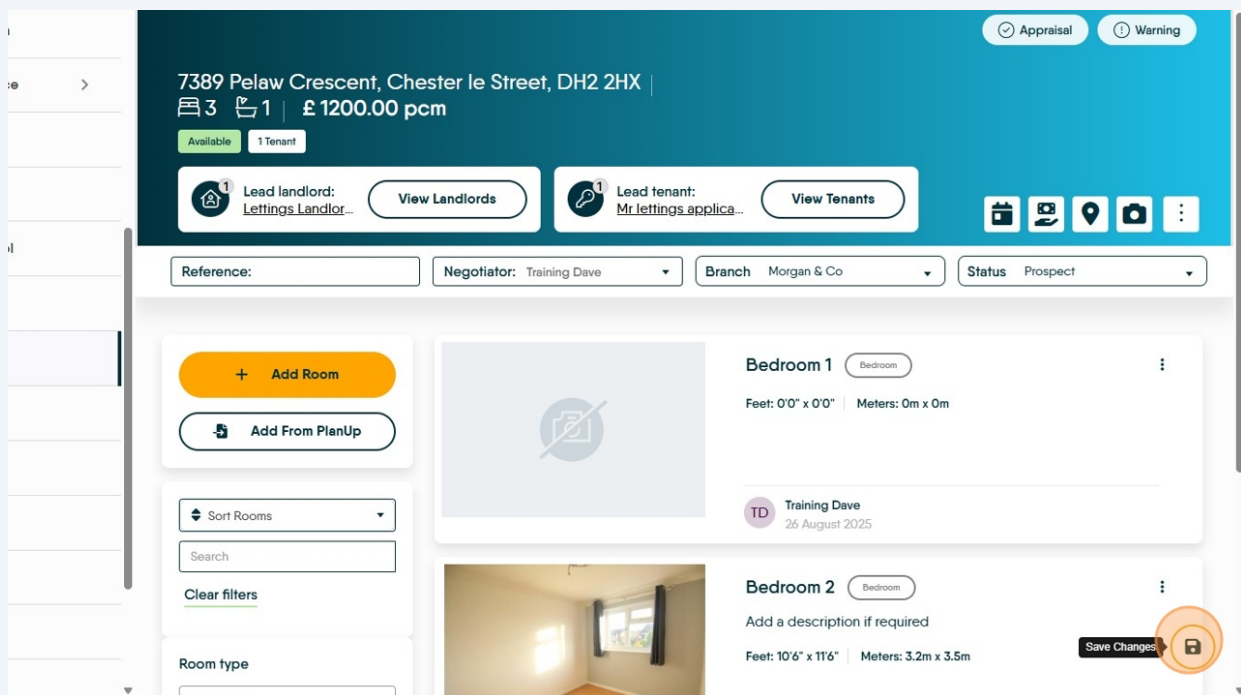
The screenshot shows the 'Add Room' dialog box with the 'Media' tab selected. The dialog has three tabs: 'Information', 'Description', and 'Media'. The 'Media' tab is active, showing a large text area for adding media. The text area contains the placeholder text 'type room description here...' and is highlighted with an orange circle. The dialog also includes the 'Cancel' and 'Save' buttons at the bottom.

- 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..



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 displays the 'Tenancies' section of a property management software. On the left is a sidebar with navigation options: maintenance, Payment, Marketing, Key Control, Media, Rooms, Portals, Viewings, Offers, Enquiries, **Tenancies** (highlighted with an orange circle), Contacts, and Documents. The main content area has a header for property '63 Woodland Road, Darlington, DL3 7BQ' with 13 beds and 14 baths at £150.00 pcm. It shows 'Available' status and '10 Tenants'. Below this, it identifies the 'Lead landlord: Mr Arthur Morg...' and 'Lead tenant: Mr Lettings Applica...'. A filter bar includes 'Reference:', 'Negotiator: David-George Morgan', 'Branch: Morgan & Co', and 'Status: Prospect'. The main list shows 38 tenancies. Three cards are visible, each for a 'Live' tenancy. Each card includes a circular icon with initials (La, La, A), the applicant name, email, phone number, room type (Bedroom 8, Bedroom 7, Bedroom 3), and the tenancy period.

Applicant	Room	Period
Lettings applicant104 zagg.dave@gmail.com 02458555	Bedroom 8	06/12/2024 - 06/12/2025
Lettings applicant83 zagg.dave@gmail.com 238971349587349857234	Bedroom 7	31/07/2024 - 30/05/2025
Applicant41 zagg.dave@gmail.com	Bedroom 3	24/05/2024 - 23/05/2025

19 Click "Add New"

The screenshot shows the 'Add New' button highlighted with an orange circle. The interface includes a sidebar with navigation options: maintenance, Payment, Marketing, Key Control, Media, Rooms, Portals, Viewings, Offers, Enquiries, Tenancies (selected), Contacts, and Documents. The main header displays property details for 63 Woodland Road, Darlington, DL3 7BQ, with 13 floors, 14 units, and a price of £150.00 pcm. It also shows 'Available' status and '10 Tenants'. Below the header, there are buttons for 'View Landlords' and 'View Tenants'. The main content area shows a list of tenancies with filters for 'Sort Tenancies', 'Search', and 'Clear filters'. The 'Add New' button is located at the top left of the tenancy list.

20 From the next screen. Click "Room"

The screenshot shows the 'Tenancy details' screen. The 'Room' dropdown menu is highlighted with an orange circle. The screen displays various fields for tenancy details, including 'Search Properties', 'Room', 'Rent Amount (£)', 'Deposit (£)', 'Tenancy Start', 'Tenancy End', 'Lease Type', 'Status', and 'Negotiator'. The 'Room' field is currently set to 'Not Applicable'. The 'Status' field is set to 'Pre Booked'. The 'Negotiator' field is set to 'Training Dave'. The 'Room' dropdown menu is open, showing 'Not Applicable' as the selected option.

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

Room
Not Applicable

Bedroom 4 (Occupied)

Bedroom 5 (Occupied)

Bedroom 6 (Occupied)

Bedroom 7 (Occupied)

Bedroom 8 (Occupied)

Bedroom 9

Tenancy applies to the property in its entirety unless stated in the contract.

Deposit (£)
173.07

Tenancy End
31/08/2026

Status
☒ Pre Booked

User Defined Fields

Special Conditions

Tenancy details

Tenancy Agreement Details

Search Properties
63 Woodland Road, Darlington, DL3 7BQ

Room
Not Applicable

Bedroom 4 (Occupied)

Bedroom 5 (Occupied)

Bedroom 6 (Occupied)

Bedroom 7 (Occupied)

Bedroom 8 (Occupied)

Bedroom 9

Tenancy applies to the property in its entirety unless stated in the contract.

Deposit (£)
173.07

Tenancy End
31/08/2026

Status
☒ Pre Booked

User Defined Fields

Special Conditions

22

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

iam property My day Lettings Sales Accounts Reporting Communications My account

Tenancy details 1

Tenancy Agreement Details

Search Properties
63 Woodland Road, Darlington, DL3 7BQ

Room
Bedroom 9
Tenancy applies to the selected room. Other bedrooms can be let separately.

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"

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Tenancy details 1/2

Tenancy Agreement Details

Search Properties
63 Woodland Road, Darlington, DL3 7BQ

Room
Bedroom 9
Tenancy applies to the selected room. Other bedrooms can be let separately.

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.

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Tenant details

Tenant Personal Information

Search

Title Select Title

Forename Enter Forename

Surname Enter Surname

Company Name Company Name

Website Enter Website

Phone Enter Home Phone Number

Work phone Enter Work Phone Number

Mobile phone Enter Mobile Phone Number

Email Enter Email Address

Source

Date of Birth Select Date

25 Check all the details are correct

iamproperty My day Lettings Sales Accounts Reporting Communications

Tenant details 2

Tenant Personal Information

Search lettings Applicant30

Title Mrs

Forename lettings

Surname Applicant30

Company Name Company Name

Website Enter Website

Phone 075128542252

Work phone Enter Work Phone Number

Mobile phone Enter Mobile Phone Number

Email zag.dave@gmail.com

Source

Date of Birth Select Date

User Defined Fields

add tenant Continue

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

iam property My day Lettings Sales Accounts Reporting Communications My account

Tenant details

User Defined Fields

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 2/2

User Defined Fields

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

My account

£ 150.00
Deposit
£ 173.07
Pre Booked

Details
Tenants
Checklist
Renewals Checklist
Compliance
Tenant Insurance
Information
Documents
Journal

IA Lettings Applicant30
zagg.dave@gmail.com

HMO PB Activate Warning Select Property

Bedroom 9, 63 Woodland Road, Darlington

Reference Negotiator Training Dave Branch Morgan & Co Status Prebooked

Tenancy Dates

Tenancy Start
01/09/2025

Tenancy End
31/08/2026

Renewal Start
01/09/2025

Vacating Date
01/09/2025

Visit Next Due
01/09/2025 22:11

Tenancy Details

Lease Period
12 Month Shorthold

Relocation Agent

General Information

With Effect Break

Notice Date

17