

Renters Rights Act and iamproperty CRM



This guide provides a step-by-step process for navigating the Renters Rights Act using iampropertyCRM, making it essential for landlords and property managers.

This document will detail what is changing in the Renters Rights Act and how to manage those changes in CRM.

From 1st May 2026 (or for tenancies that start from that date):

1

Add tenancies as normal – when adding the tenancy and setting periodic as the lease type, you can choose an indicative end date or leave the end date the same as the start date and select the drop down for the lease type to be periodic. To learn how to add a tenancy [\[Add Tenancy\]](#))

Set the Lease type to Periodic see below for a guide on this.

Once the tenancy has been added you can add a rent review date onto the primary tenant in the 'Additional Information' section on the tenants details tab – this would be 12 months after the tenancy start date. To learn how to add a Rent Review date [\[Add Rent Review Date\]](#)

Using the activity list to track the Rent Review dates you have set. On the lettings dashboard set rent review to notify of upcoming reviews due, we suggest 90 days. To learn How to use the Activity List [\[Configure Activity List\]](#)

If a Rent Increase is required. The Rent Review date will give you the opportunity to track upcoming opportunities to issue a Section 13 notice. To learn how to send a Section 13 [\[Issue Section 13 letter\]](#)

If a rent increase is implemented. Use tiered rent to initiate the new amount for the correct date. To learn how to create a Tiered rent [\[Create a Tiered Rent\]](#)

Once reviews etc are completed. Update the Rent review date on the tenant record 12 months forward

2

How to change the lease period to **'Periodic'**

3 Navigate to the **Tenancy Record**

The screenshot shows the 'iam property' dashboard. The top navigation bar includes 'My day', 'Lettings', 'Sales', 'Accounts', 'Reporting', and 'Communications'. The left sidebar contains a menu with 'Details', 'Tenants', 'Checklist', 'Renewals Checklist', 'Compliance', 'Rent Insurance', 'Information', 'Documents', and 'Journal'. The main content area is titled 'Tenancy Record' and features a summary card with 'Total Rent £1600.00', 'Total Deposit £1846.00', and a 'Live' status. Below this are two sections: 'Tenancy Dates' and 'Tenancy Details'. The 'Tenancy Dates' section contains five cards: 'Tenancy Start' (28/03/2026), 'Tenancy End' (18/02/2027), 'Renewal Start' (28/03/2026), 'Vacating Date' (19/02/2026), and 'Visit Next Due' (19/02/2026). The 'Tenancy Details' section includes fields for 'Lease Period' (12 Month Shorthold), 'Relocation Agent', 'Agreement Name' (Mr Lettings Applicant211), 'Agreement Signed' (toggle), 'Follow Up' (toggle), and 'Follow Up Date' (19/02/2026). The 'General Information' section includes 'With Effect Break', 'Notice Date', 'Break Clause' (with formatting options B, I, U, and a list icon), and a text area for notes.

4 Click "**Lease Period**"

This screenshot is identical to the previous one, but with an orange rectangular box highlighting the 'Lease Period' dropdown menu in the 'Tenancy Details' section. The dropdown currently shows '12 Month Shorthold'. The rest of the page content, including the navigation, sidebar, and other data cards, remains the same.

5 Click "Periodic"

The screenshot displays a tenancy management dashboard. On the left is a sidebar with navigation options: Details, Tenants, Checklist, Renewals Checklist, Compliance, Rent Insurance, Information, Documents, Journal, and E-Sign. The main content area is divided into three sections:

- Tenancy Dates:** A row of five cards showing key dates: Tenancy Start (28/03/2026), Tenancy End (18/02/2027), Renewal Start (28/03/2026), Vacating Date (19/02/2026), and Visit Next Date (19/02/2026).
- Tenancy Details:** A form with fields for Lease Period (HMO Room), Relocation Agent, and a dropdown menu for lease types. The dropdown menu is open, showing options: 5 Year, 6 Month Shorthold, **Periodic** (highlighted with an orange circle), Rolling Tenancy, HMO Room, and 9 Month Shorthold. There is also a 'Follow Up' toggle switch.
- General Information:** Fields for 'With Effect Break' and 'Notice Date', a 'Break Clause' section with formatting icons (B, I, U, list) and a text area for notes, and a 'Notice Notes' section with formatting icons.

6 Setting a Rent Review Date

7 Click "Tenants"

The screenshot shows the IAM Property software interface. At the top right, there are links for 'iamproperty', 'CRM', and 'movebutle'. Below this is a navigation bar with 'My day', 'Lettings', 'Sales', 'Accounts', 'Reporting', and 'Communications'. A sidebar on the left contains a menu with 'Details', 'Tenants' (highlighted with an orange circle), 'Checklist', 'Renewals Checklist', 'Compliance', 'Rent Insurance', 'Information', and 'Documents'. The main content area is divided into two sections: 'Tenancy Dates' and 'Tenancy Details'. The 'Tenancy Dates' section contains five cards: 'Tenancy Start' (28/03/2026), 'Tenancy End' (18/02/2027), 'Renewal Start' (28/03/2026), 'Vacating Date' (19/02/2026), and 'Visit Next Date' (19/02/2026). The 'Tenancy Details' section includes fields for 'Lease Period' (Periodic), 'Relocation Agent', 'Agreement Name' (Mr Lettings Applicant211), 'Agreement Signed' (toggle), and 'Follow Up' (toggle). The 'General Information' section includes 'With Effect Break', 'Notice Date', 'Break Clause' (with icons for Bold, Italic, Underline, and Link), and a 'Enter your notes...' field.

8 Click "View Tenant"

The screenshot shows the 'View Tenant' screen in the IAM Property software. The top left sidebar is the same as in the previous screenshot. The main content area has a dark blue header with a tenant profile card for 'Lettings Applicant211' (zagg.dave@gmail.com, 07885255222). Below the header, the address '9099 Pelaw Crescent, Chester le Street' is displayed. A navigation bar contains 'Reference', 'Negotiator' (Training Dave), 'Branch' (Morgan & Co), and 'Status' (Current). Below this are two orange buttons: '+ Manage Tenants' and '+ New Permitted Occupier'. A search and filter section includes a 'Sort Tenants' dropdown, a search input, and a 'Clear filters' link. The main area displays two tenant cards. The first card is for 'Lettings Applicant211' (zagg.dave@gmail.com, 07885255222) and has a 'View Tenant' button highlighted with an orange circle. The second card is for 'Letitia Applicant211' (zagg.dave@gmail.com, 07852655222) and also has a 'View Tenant' button.

9 In the Tenant screen click the "Rent Review" field.

The screenshot shows a tenant management interface. On the left, there is a sidebar with financial data: £ 1600.00, Monthly, 28 Mar 2026, and £0.00. The main content area is divided into two columns: 'Personal Information' and 'Additional Information'. The 'Rent Review' field in the 'Additional Information' section is highlighted with an orange circle. Below it, there are fields for 'Automatically Rent Inv.' (a toggle switch), 'Housing Benefit' (a toggle switch), and 'Case Number'. At the bottom right, there is a yellow lock icon.

10 Update the Rent Review Date

The screenshot shows the same tenant management interface as in step 9. The 'Rent Review' field is now selected, indicated by a blue border. A calendar pop-up is displayed over the 'Rent Review' field, showing the month of February 2026. The date 27 is highlighted with an orange circle. The calendar grid is as follows:

Sun	Mon	Tue	Wed	Thu	Fri	Sat
25	26	27	28	29	30	31
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
1	2	3	4	5	6	7

The 'Rent Review' field is highlighted in blue, and the date 27 is highlighted in orange on the calendar. The 'Automatically Rent Inv.' and 'Housing Benefit' toggle switches are visible below the calendar. At the bottom right, there is a yellow lock icon.

11

Navigate to the Lettings dashboard. Rent Review dates will show in here (once selected) Click the 'cog' to edit the notification timescales.

The screenshot displays the Lettings dashboard. At the top, there are six summary cards: Properties (123), Landlords (92), Tenants (61), Applicants (15), PB Tenants (40), and Contracts (30). Below these is an 'Activity List' on the left and a 'Rent Review' table on the right. The 'Rent Review' table lists various entries with columns for Negotiator, Tenant, and Property.

	Negotiator	Tenant	Property
⋮	<input type="checkbox"/> David-George Morgan	Stanley Morgan	Flat 2 Chesterf
⋮	<input type="checkbox"/> David-George Morgan	Ella Petch	24 Westgarth T
⋮	<input type="checkbox"/> David-George Morgan	George Reeks	The Loft Johns
⋮	<input type="checkbox"/> Training Dave	Lettings Applicant109	345 5 Yew Tree
⋮	<input type="checkbox"/> Training Dave	Lettings Applicant34	69 Kingsway, D
⋮	<input type="checkbox"/> Training Dave	Lettings Applicant136	715 Pelaw Cres

12

Sending the Section 13 from CRM

13 From the Tenancy record, click the 'Send Letter' icon.

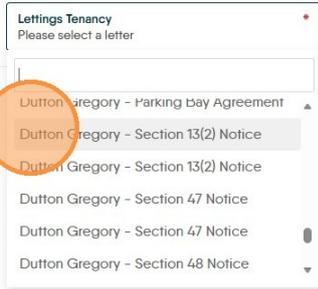
The screenshot shows a web application interface for managing tenancy records. At the top, there is a navigation bar with menu items: 'y day', 'Lettings', 'Sales', 'Accounts', 'Reporting', and 'Communications'. On the right side of the navigation bar, there are icons for a grid, a calendar, a notification bell with '15', a search icon, and a 'My account' button. Below the navigation bar, a header section displays a tenant profile for 'Lettings Applicant211' with contact details: 'zagg.dave@gmail.com' and '078855255222'. A 'Warning' icon is visible in the top right of this section. The address '9099 Pelaw Crescent, Chester le Street' is shown below the profile. A filter bar contains 'Reference', 'Negotiator Training Dave', 'Branch Morgan & Co', and 'Status Current'. On the left, there are buttons for '+ Manage Tenants' and '+ New Permitted Occupier', along with a 'Sort Tenants' dropdown, a search input, and a 'Clear filters' link. The main area shows a list of tenants with two entries: 'Lettings Applicant211' and 'Letitia Applicant211', both with the same contact details. The 'Send Letter' icon, which is a document with a checkmark, is circled in orange in the top right corner of the tenant list area.

14 Click "Please select a letter"

The screenshot shows a close-up of a dropdown menu. The menu is open, showing the text 'Lettings tenancy' and 'Please select a letter'. The text 'Please select a letter' is circled in orange. The dropdown arrow is visible on the right side of the menu.

15

Select your Section 13 notice from the the drop down menu in this example we are using the optional Dutton Gregory letters pack so we select "Dutton Gregory - Section 13(2) Notice"



Lettings Tenancy
Please select a letter

- Dutton Gregory - Parking Bay Agreement
- Dutton Gregory - Section 13(2) Notice**
- Dutton Gregory - Section 13(2) Notice
- Dutton Gregory - Section 47 Notice
- Dutton Gregory - Section 47 Notice
- Dutton Gregory - Section 48 Notice

16

Click here to create the letter.

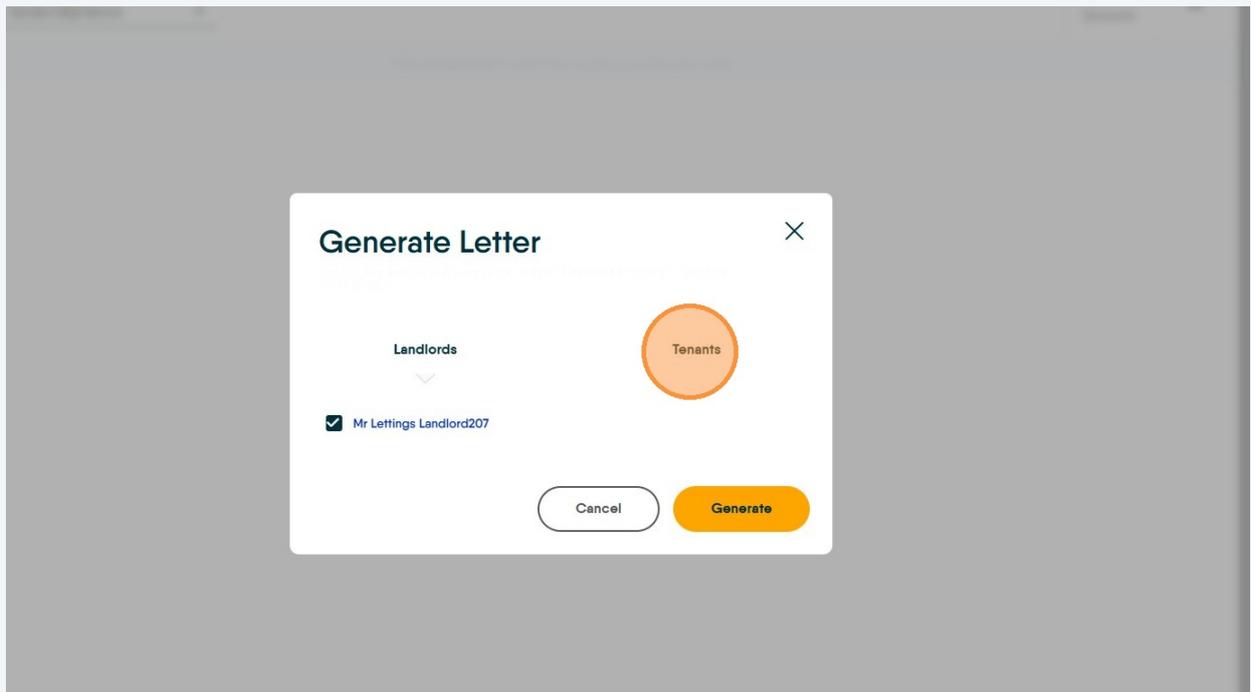


Section 13(2) Notice

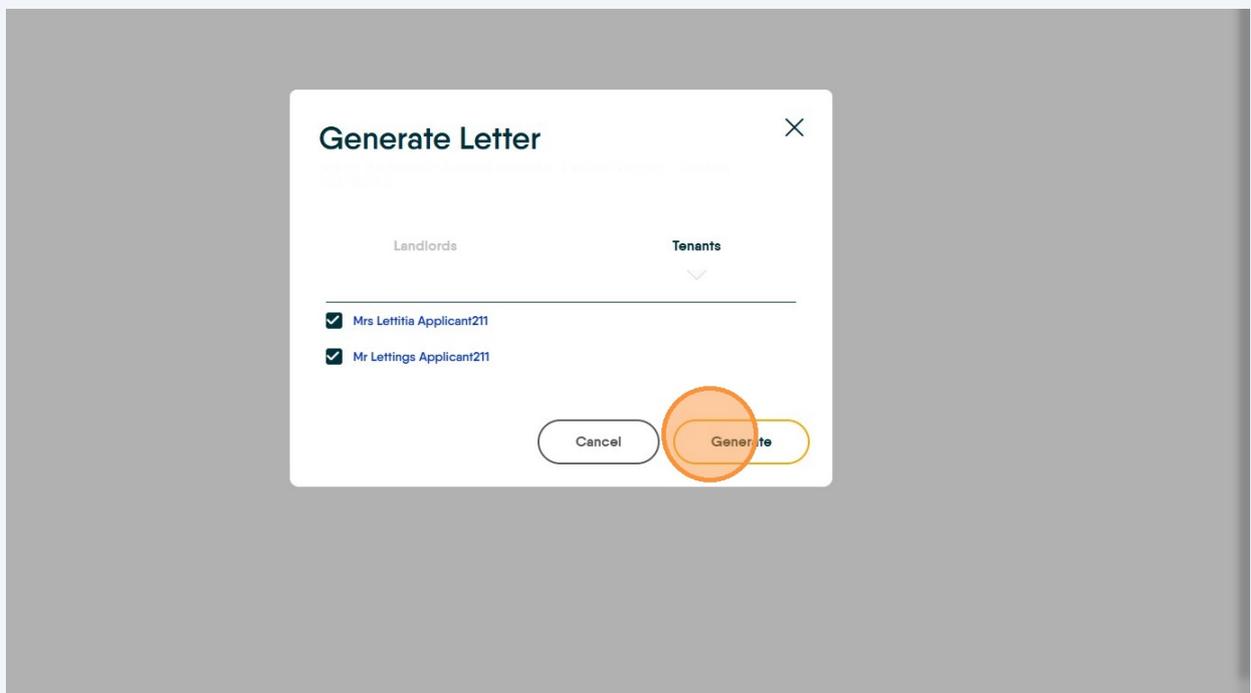
Generate

Click on Generate to select the records you want in the letter.

17 Check the details for the Landlord and click "Tenants"...



18 ...to check the details for the Tenants. Click "Generate" to create the letter.



19

Click The letter will show on the screen. Click 'View Merged Data' to see the letter as it will be sent, to send the letter use either the Send Email option or (if enabled) E-Sign.

