

# Create a New Tenancy Agreement for a Property -From the Applicant Record



This guide provides a step-by-step process for creating a new tenancy agreement directly from the Applicant Record in a CRM system.

It ensures that users can accurately input tenant and property details, including rent and deposit amounts, while accommodating multiple tenants. By following this guide, users can streamline the tenancy creation process, ensuring all necessary information is captured correctly and efficiently.



Alert! From the 1st May 2026 you will only be able to offer (the majority of customers) a Periodic Tenancy this guide has been edited to reflect this.

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This process of creating a new tenancy can be started from 2 places in the CRM. Either the Applicant record or the Property Record. This guide will look at creating the Tenancy from the Applicant Record.

2

From the Applicant record. **Click here.**

The screenshot shows the CRM interface for an Applicant Record. The top navigation bar includes 'iamproperty', 'CRM', 'movebutler', and 'iamsold'. The main header displays the user's name 'David Morgan' with contact details and a 'My account' button. The form is for '76 Pelaw Crescent, Chester le Street, County Durham' and is in 'Lettings' mode. It includes fields for 'reference:', 'Negotiator: Training Dave', 'Branch: Morgan & Co', and 'Status: No status'. The 'Personal Information' section contains fields for Title, Forename (David), Surname (Morgan), Company Name, Website, Phone Number (01865860873), Work phone, Mobile phone (07802200655), Email Address (david.morgan@iamproperty), Salutation, Source, and Temperature. The 'Applicant Address' section is partially visible at the bottom. A red circle highlights the 'More options' menu icon in the top right corner of the form.

### 3 Click "Transfer to Tenancy"

The screenshot shows the IAM Property software interface. At the top, there is a header with the user's name 'David Morgan', contact information, and a 'Lettings' button. Below the header, there are fields for 'reference:', 'Negotiator: Training Dave', and 'Branch: Morgan & Co'. The main section is titled 'Personal Information' and contains several input fields: Title, Forename (David), Surname (Morgan), Website, Phone Number (01865860873), Work phone, Email Address (david.morgan@iamproperty), Salutation, and Source. Below this is the 'Applicant Address' section with a search icon and an 'Edit Manually' button. A dropdown menu is open on the right side, listing various actions: Add Call, Log Call, Create Letter, Send SMS, Send Email, Transfer to Tenancy (highlighted with an orange circle), and E-Sign. The address '76 Pelaw Crescent, Chester le Street, County Durham, DH2 2HX, UK' is visible in the address field.

### 4 Search for and select the property Address from the drop down list.

The screenshot shows the 'Tenancy details' page in the IAM Property software. The page title is 'Tenancy details'. Below the title, there is a section for 'Tenancy Agreement Details'. This section contains several input fields: 'Search Properties' (with a search icon and a dropdown menu), 'Rent Amount', 'Deposit Amount', 'Tenancy Start' (25/02/2026), 'Tenancy End' (24/02/2027), 'Lease Type' (12 Month Shorthold), 'Status' (Pre Booked), and 'Negotiator' (Training Dave). The 'Search Properties' dropdown menu is open, showing a list of search results. The first result is '7725', and the second result is '7725 Pelaw Crescent, Chester le Street, County Durham, DH2 2HX, UK', which is highlighted with an orange circle. The 'IAM Property' logo is visible in the top left corner, and the navigation menu is at the top.

5 Click the "**Rent Amount**" field and ensure the correct rent amount is showing.

The rent amount displayed is what is advertised in the property record. If there is more than 1 tenant contributing to paying the rent and you want each tenant to be shown to be paying their own share, make sure to edit this rent amount to be the amount your tenant is paying and as you add the additional tenants add their contribution in at that time. If 1 Tenant is paying the full rent, make sure any other tenants you add have £0 rent and deposit amounts.

**Tenancy details**

Tenancy Agreement Details

<b>Search Properties</b> 92 Pelaw Crescent, Chester le Street, County Durham, DH2 2HX, UK	*
<b>Room</b> Not Applicable	*
Tenancy applies to the property in its entirety unless stated in the contract.	
<b>Rent Amount (£)</b> 650	*
<b>Deposit (£)</b> 750	*
<b>Tenancy Start</b> 28/10/2025	*
<b>Tenancy End</b> 27/10/2026	*
<b>Lease Type</b> 12 Month Shorthold	*
<b>Status</b>	<input checked="" type="radio"/> Pre Booked
<b>Negotiator</b> Training Dave	*

6 Click the **"Deposit Amount"** field. Check the deposit is correct

Tenancy details 1/2

Tenancy Agreement Details

Search Properties 92 Pelaw Crescent, Chester le Street, County Durham, DH2 2HX, UK	
Room Not Applicable	Tenancy applies to the property in its entirety unless stated in the contract.
Rent Amount (£) 650	Deposit (£) 750
Tenancy Start 28/10/2025	Tenancy End 27/10/2026
Lease Type 12 Month Shorthold	Status <input checked="" type="radio"/> Pre Booked
Negotiator Training Dave	

[Continue](#)

7 Click the **"Select Date"** field and set the date the tenancy is due to start.

This could be left as the date you create the tenancy, however best practice is to update it to the date you expect the tenancy to start. At this point check that the **'Lease Type' is set as Periodic** if as shown here it is showing as 12mth (or anything else) update the Lease Type field in the property record.

Tenancy details

Tenancy Agreement Details

Search Properties 92 Pelaw Crescent, Chester le Street, County Durham, DH2 2HX, UK	
Room Not Applicable	Tenancy applies to the property in its entirety unless stated in the contract.
Rent Amount (£) 650	Deposit (£) 750
Tenancy Start 28/10/2025	Tenancy End 27/10/2026
Lease Type 12 Month Shorthold	Status <input checked="" type="radio"/> Pre Booked
Negotiator Training Dave	

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**If the lease is to start after the 1st May 2026. Check the lease type is set to "Periodic"**

### Tenancy details

#### Tenancy Agreement Details

<b>Search Properties</b> 7725 Pelaw Crescent, Chester le Street, County Durham, DH2 2HX, UK	
<b>Room</b> Not Applicable	Tenancy applies to the property in its entirety unless stated in the contract.
<b>Rent Amount (£)</b> 1,500	<b>Deposit (£)</b> 1,730.76
<b>Tenancy Start</b> 25/02/2026	<b>Tenancy End</b> 24/02/2027
<b>Lease Type</b> 12 Month Shorthold	<b>Status</b> <input type="radio"/> Pre Booked
<b>Lease Type</b> 6 Month Shorthold 9 Month Shorthold 12 Month Shorthold 18 Month Shorthold 2 Year 3 Year	



### Tenancy details

#### Tenancy Agreement Details

<b>Search Properties</b> 7725 Pelaw Crescent, Chester le Street, County Durham, DH2 2HX, UK	
<b>Room</b> Not Applicable	Tenancy applies to the property in its entirety unless stated in the contract.
<b>Rent Amount (£)</b> 1,500	<b>Deposit (£)</b> 1,730.76
<b>Tenancy Start</b> 25/02/2026	<b>Tenancy End</b> 24/02/2027
<b>Lease Type</b> 12 Month Shorthold	<b>Status</b> <input type="radio"/> Pre Booked
<b>Lease Type</b> Periodic Rolling Tenancy 1 Month Shorthold HMO Room 3 Month Shorthold 6 Month Shorthold	



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The **Tenancy End** date is controlled by the '**Lease Type**' option and for a periodic tenancy will be 1 month onwards from the Tenancy Start date.

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**Tenancy details**

Tenancy Agreement Details

<b>Search Properties</b> 92 Pelaw Crescent, Chester le Street, County Durham, DH2 2HX, UK	
<b>Room</b> Not Applicable	Tenancy applies to the property in its entirety unless stated in the contract.
<b>Rent Amount (£)</b> 650	<b>Deposit (£)</b> 750
<b>Tenancy Start</b> 28/11/2025	<b>Tenancy End</b> 27/10/2026
<b>Lease Type</b> 12 Month Shorthold	<b>Status</b> <input type="radio"/> Pre Booked
<b>Negotiator</b> Training Dave	

[Continue](#)  
or press ENTER

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Click "**Status Pre Booked**" this is the default setting so should not need to be changed

iam property    My day    Lettings    Sales    Accounts    Reporting    Communications       [My account](#)

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**Tenancy details**

Tenancy Agreement Details

<b>Search Properties</b> 92 Pelaw Crescent, Chester le Street, County Durham, DH2 2HX, UK	
<b>Room</b> Not Applicable	Tenancy applies to the property in its entirety unless stated in the contract.
<b>Rent Amount (£)</b> 650	<b>Deposit (£)</b> 750
<b>Tenancy Start</b> 28/11/2025	<b>Tenancy End</b> 27/11/2026
<b>Lease Type</b> 12 Month Shorthold	<b>Status</b> <input checked="" type="radio"/> Pre Booked
<b>Negotiator</b> Training Dave	

[Continue](#)

# 11 Click "Continue"

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### Tenancy details

Tenancy Agreement Details

Search Properties 92 Pelaw Crescent, Chester le Street, County Durham, DH2 2HX, UK	
Room Not Applicable	Tenancy applies to the property in its entirety unless stated in the contract.
Rent Amount (£) 650	Deposit (£) 750
Tenancy Start 28/11/2025	Tenancy End 27/11/2026
Lease Type 12 Month Shorthold	Status <input checked="" type="radio"/> Pre Booked
Negotiator Training Dave	



# 12 The Tenant details will automatically be entered, check they are correct and complete any gaps. Click into the fields to edit if required.

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### Tenant details

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Tenant Personal Information

Search David Morgan	
Title Select Title	Forename David
Surname Morgan	Company Name Company Name
Website Enter Website	Phone 01865860873
Work phone Enter Work Phone Number	Mobile phone 07802200655
Email david.morgan@iamproperty.com	
Source	Date of Birth Select Date

Agreement Details

[add tenant](#) [Continue](#)

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Check the Rent details are correct, is each tenant paying their own share or is one tenant responsible for paying? Click the "Rent Amount" field to edit the rent, the Deposit amount will change automatically as will the holding deposit.

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Agreement Details **Tenant details**

Rent (£) 650	Next Rent Due 28/11/2025
Collection Day Same Day	Rent Period Monthly
Deposit (£) 750	Holding Deposit (£) 150

Prebooked Address

Postcode  
DH2 2HX

Select Address  
76 Pelaw Crescent, Chester le Street, County Durham, DH2 2HX, UK

Tenant Financial Details

Account Name	Bank Name
Bank Reference	Account Number

add tenant Continue

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Click "Prebooked Address" check and update as required.

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Agreement Details **Tenant details**

Rent (£) 650	Next Rent Due 28/11/2025
Collection Day Same Day	Rent Period Monthly
Deposit (£) 750	Holding Deposit (£) 150

Prebooked Address

Postcode  
DH2 2HX

Select Address  
76 Pelaw Crescent, Chester le Street, County Durham, DH2 2HX, UK

Tenant Financial Details

Account Name	Bank Name
Bank Reference	Account Number

add tenant Continue

15 Click **"Tenant Financial Details"** check and update as required.

Select Address  
76 Pelaw Crescent, Chester le Street, County Durham, DH2 2HY, UK

### Tenant details

2

#### Tenant Financial Details

Account Name	Bank Name
Bank Reference	Account Number
Sort Code	Payment Method
End Date	Inclusive Rent Package

#### Contact Preferences

Do not contact this user	<input type="checkbox"/>
Email	<input checked="" type="checkbox"/>
Letter	<input checked="" type="checkbox"/>
SMS	<input checked="" type="checkbox"/>
Phone	<input checked="" type="checkbox"/>
Allow Third Party	<input type="checkbox"/>
Allow Marketing	<input type="checkbox"/>

add tenant Continue

16 Click **"Contact Preferences"** check and update as required.

Sort Code

Payment Method

### Tenant details

2

End Date	Inclusive Rent Package
----------	------------------------

#### Contact Preferences

Do not contact this user	<input type="checkbox"/>
Email	<input checked="" type="checkbox"/>
Letter	<input checked="" type="checkbox"/>
SMS	<input checked="" type="checkbox"/>
Phone	<input checked="" type="checkbox"/>
Allow Third Party	<input type="checkbox"/>
Allow Marketing	<input checked="" type="checkbox"/>

Checked by Training Dave	Date Checked 28/10/2025
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#### Guarantor Information

Does this tenant have a guarantor?	<input type="checkbox"/>
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add tenant Continue

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Click "**Guarantor Information**" add the Guarantor details if required.

The screenshot shows the 'Tenant details' form in the iam property system. The form includes sections for 'Sort Code', 'Payment Method', 'End Date', 'Inclusive Rent Package', 'Contact Preferences', and 'Guarantor Information'. The 'Guarantor Information' section is highlighted with an orange box and contains a toggle switch for 'Does this tenant have a guarantor?'. The 'add tenant' button is highlighted with a blue circle.

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If a second, or subsequent, tenant is to be added. Click "**add tenant**" add the tenant details, the screen is similar to the previous screens for the lead tenant.

Ensure the rent details are correct based on how the tenants are paying either enter their contribution or £0 if the lead tenant is responsible.

The screenshot shows the 'Tenant details' form in the iam property system. The form includes sections for 'Sort Code', 'Payment Method', 'End Date', 'Inclusive Rent Package', 'Contact Preferences', and 'Guarantor Information'. The 'add tenant' button is highlighted with an orange circle.

19 Click "Continue"

Sort Code **Tenant details** Payment Method 2/2

End Date  Inclusive Rent Package

Contact Preferences

Do not contact this user

Email  Letter

SMS  Phone

Allow Third Party  Allow Marketing

Checked by Training Dave  Date Checked 28/10/2025

Guarantor Information

Does this tenant have a guarantor?

add tenant **Continue**  
or press ENTER

20 Click "Create Tenancy"

**Review & Submit**

**Summary of agreement**

Landlords: Lettings Landlord205  
Tenants: Ms Lwttings Applicant136  
Property: 7725 Pelaw Crescent, Chester le Street, County Durham, DH2 2HX, UK  
Lease Details: Periodic starting on 25/02/2026, ending on 24/03/2026  
Deposit: £1730.76  
Rent: £1500.00 to be paid Monthly

**Create Tenancy** Edit Information

**21** The Pre Booked Tenancy will now be created.