

# Terminating a Tenancy in CRM



This guide provides a step-by-step process for terminating a tenancy using the CRM platform, ensuring that users can efficiently navigate the system. It simplifies the often complex task of managing tenancy details, making it accessible even for those unfamiliar with the software.

Tenants can also be removed individually from the Tenancy if required.

## 1 Navigate to the Tenancy you wish to terminate.

The screenshot displays the CRM interface for a tenancy. The top navigation bar includes 'My day', 'Lettings', 'Sales', 'Accounts', 'Reporting', and 'Communications'. The user's account is 'My account'. The main header shows the tenant's name 'Lettings Applicant184' with email 'zagq.dave@gmail.com' and the address '8973 Pelaw Crescent, Chester le Street'. Below this, there are filters for 'Reference', 'Negotiator' (Training Dave), 'Branch' (Morgan & Co), and 'Status' (Current). The 'Tenancy Dates' section contains five cards: 'Tenancy Start' (16/12/2025), 'Tenancy End' (16/12/2025), 'Renewal Start' (16/12/2025), 'Vacating Date' (21/01/2026), and 'Visit Next Due' (21/01/2026 18:36). The 'Tenancy Details' section shows 'Lease Period' (Periodic) and 'Relocation Agent'. The 'General Information' section shows 'With Effect Break' and 'Notice Date'. A sidebar on the left lists various menu items like 'Details', 'Tenants', 'Checklist', 'Renewals Checklist', 'Compliance', 'Tenant Insurance', 'Information', 'Documents', and 'Journal'.

2

Click this text field and set the date the tenants are vacating the property. This is purely for information reasons.

The screenshot shows a software interface for property management. At the top, there is a header with a user profile for 'Lettings Applicant184' (zagg.dave@gmail.com) and a 'Warning' icon. Below the header, the address '8973 Pelaw Crescent, Chester le Street' is displayed. A navigation bar contains fields for 'Reference', 'Negotiator' (Training Dave), 'Branch' (Morgan & Co), and 'Status' (Current). The main content area is divided into two sections: 'Tenancy Dates' and 'General Information'. The 'Tenancy Dates' section features five cards: 'Tenancy Start' (16/12/2025), 'Tenancy End' (16/12/2025), 'Renewal Start' (16/12/2025), 'Vacating Date' (21/01/2026), and 'Visit Next Due' (21/01/2026 18:36). The 'Vacating Date' card is highlighted with an orange circle. The 'General Information' section includes fields for 'Lease Period' (Periodic), 'Relocation Agent', 'With Effect Break', 'Notice Date', and 'Break Clause'.

3

Click here.

This screenshot is identical to the one above, showing the same software interface. The 'Vacating Date' field in the 'Tenancy Dates' section is highlighted with an orange circle, indicating the point of interaction for step 3.

4

Set the 'Tenancy End' date to the date the tenants are vacating and click 'Save'

The screenshot shows a software interface for managing a tenancy. On the left is a sidebar with navigation options: Details, Tenants, Checklist, Renewals Checklist, Compliance, Rent Insurance, Information, Documents, Journal, and E-Sign. The top header displays financial information: Total Rent £1320.00, Total Deposit £1523.00, and a 'Live' status indicator. The main header shows the property address '8973 Pelaw Crescent, Chester le Street' and the tenant 'Lettings Applicant184' with email 'zagg.dave@gmail.com'. Below the header are fields for Reference, Negotiator (Training Dave), Branch (Morgan & Co), and Status (Current). The 'Tenancy Dates' section contains five cards: Tenancy Start (16/12/2025), Tenancy End (16/12/2025, highlighted with a red circle), Renewal Start (16/12/2025), Vacating Date (21/01/2026, checked), and Visit Next Due (21/01/2026). The 'Tenancy Details' section includes Lease Period (Periodic), Relocation Agent, and Agreement Name (Mr Lettings Applicant184). The 'General Information' section includes With Effect Break, Notice Date, and Break Clause options (B, I, U, and a grid icon).

5

Click here to 'Save'

This screenshot is identical to the one above, showing the same software interface. The 'Tenancy End' date is now updated to 21/01/2026. In the 'General Information' section, the 'Save Changes' button is highlighted with a red circle. The interface also shows a 'Warning' icon in the top right corner.

6

If you are using the compliance screen to track the starts and end meter readings. Click "Compliance"

Total Rent £ 1320.00  
Total Deposit £ 1523.00  
Status Live

LA Lettings Applicant184  
zag.g.dave@gmail.com

8973 Pelaw Crescent, Chester le Street

Reference Negotiator Training Dave Branch Morgan & Co Status Current

### Tenancy Dates

| Tenancy Start | Tenancy End | Renewal Start | Vacating Date | Visit Next Date |
|---------------|-------------|---------------|---------------|-----------------|
| 16/12/2025    | 21/01/2026  | 16/12/2025    | 21/01/2026    | 21/01/2026      |

### Tenancy Details

Lease Period: Periodic  
Relocation Agent: [Dropdown]  
Agreement Name: Mr Lettings Applicant184

### General Information

With Effect Break: [Dropdown] Notice Date: [Dropdown]  
Break Clause: **B** **I** **U** [Dropdown]

7

Click "INITIAL AND FINAL METER READINGS" and update the readings as required.

£ 1320.00  
£ 1523.00  
Status Live

LA Lettings Applicant184  
zag.g.dave@gmail.com

8973 Pelaw Crescent, Chester le Street

Reference Negotiator Training Dave Branch Morgan & Co Status Current

### INITIAL AND FINAL METER READINGS

[+ Add New](#)

| Electric meter                  | Gas meter                       | Water meter                     | Oil meter                       |
|---------------------------------|---------------------------------|---------------------------------|---------------------------------|
| Please click the button to add. |

8 Click here to 'Save'.

The screenshot shows a software interface for managing property information. At the top, there's a header with a user profile (LA, Lettings Applicant184, zago.dave@gmail.com) and a warning icon. Below the header, the address "8973 Pelaw Crescent, Chester le Street" is displayed. There are several dropdown menus for "Reference", "Negotiator" (Training Dave), "Branch" (Morgan & Co), and "Status" (Current). The main section is titled "INITIAL AND FINAL METER READINGS" and contains four columns for "Electric meter", "Gas meter", "Water meter", and "Oil meter". Each column has a plus icon and the text "Please click the button to add." At the bottom right, there is a "Save Change" button with a lock icon, which is highlighted with an orange circle.

9 The final rent will show at the bottom of the screen in the 'Final Rent' field. If the tenant is leaving before the end of the tenancy a manual rent invoice will need to be created.

The screenshot shows a software interface for managing tenant details. The "Primary Tenant" section contains a table with five columns: "Rent", "Deposit", "Initial Rent (£)", "Final Rent (£)", and "Total Rent (£)". The values are: Rent (£) 1320.00, Deposit 1523.00, Initial Rent (£) 1320.00, Final Rent (£) -868.00, and Total Rent (£) 452.00. The "Final Rent (£)" field is highlighted with an orange circle. Below the table, there are several input fields for "Rent Period" (Monthly), "Collection Date" (16/12/2025), "Next Rent Due" (06/02/2026), "Rent review", "Thereafter (x 0)" (1320.00), "INC Charge" (0), "ERV" (0), and "ERV Variance %" (0). At the bottom, there is a "User Defined Fields" section with a "Special Conditions" field. A "Save Change" button with a lock icon is visible at the bottom right, highlighted with an orange circle.

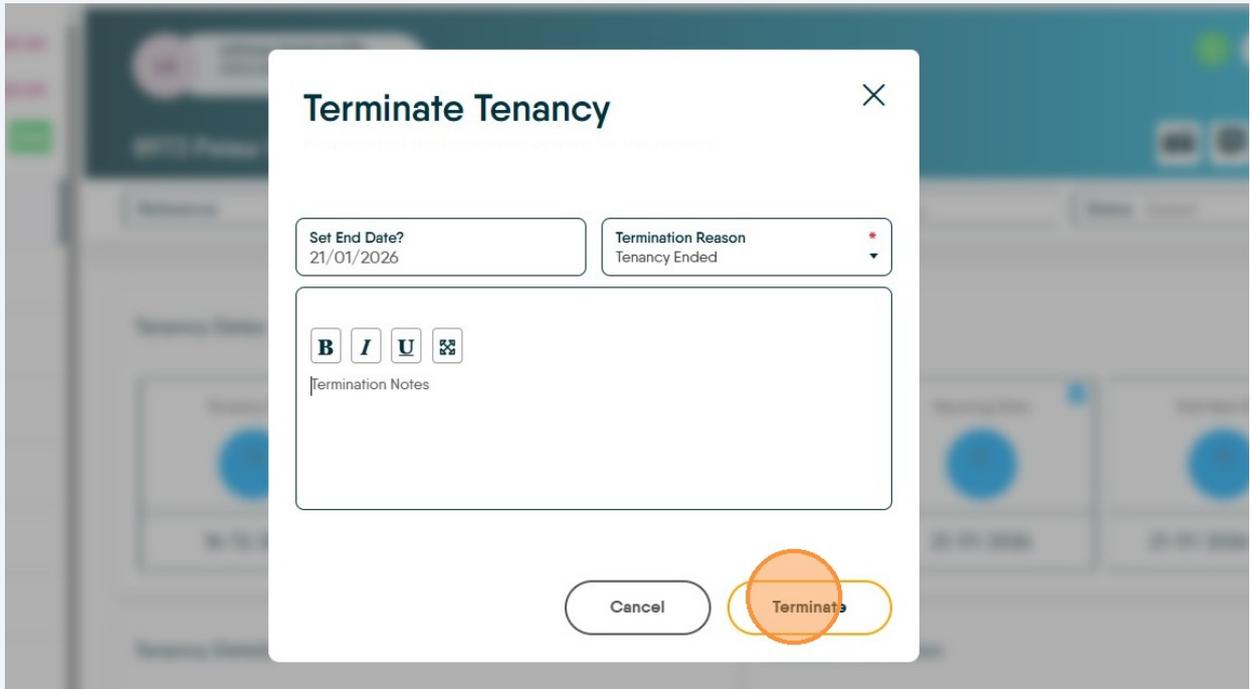
10 To terminate the tenancy, click the 3-dot menu. Click "Terminate Tenancy"

The screenshot shows a software interface for property management. At the top, there's a navigation bar with 'property' logo and various menu items like 'My day', 'Lettings', 'Sales', 'Accounts', 'Reporting', and 'Communications'. A user profile 'My account' is visible in the top right. Below the navigation, there's a header for a specific property: '8973 Pelaw Crescent, Chester le Street'. A 3-dot menu is open, showing options: 'Create Letter', 'Send SMS', 'Send Email', 'Terminate Tenancy' (highlighted with an orange circle), and 'E-Sign'. Below the menu, there's a 'Tenancy Dates' section with a table of dates: Tenancy Start (16/12/2025), Tenancy End (21/01/2026), Renewal Start (16/12/2025), Vacating Date (21/01/2026), and a final date (21/01/2026 18:36). Below this is a 'Tenancy Details' section with fields for 'Lease Period' (Periodic) and 'Relocation Agent'. To the right is a 'General Information' section with fields for 'With Effect Break' and 'Notice Date'.

11 Set the tenancy end date and the termination reason. Then add any notes that you require.

The screenshot shows a modal window titled 'Terminate Tenancy'. It has a close button (X) in the top right corner. The form contains three main sections: 1. 'Set End Date?' with a date input field showing '16/12/2025' (highlighted with an orange circle). 2. 'Termination Reason' with a dropdown menu. 3. 'Termination Notes' with a text area and a rich text editor toolbar containing icons for Bold (B), Italic (I), Underline (U), and a link icon. At the bottom of the modal, there are two buttons: 'Cancel' and 'Terminate'.

12 Click "Terminate"



13 Click "Terminate"

