

# Removing and Replacing a Tenant in Tenancy Records



Learn how to efficiently manage tenancy details by removing existing tenants and adding new applicants to your records. This guide provides a step-by-step walkthrough for updating tenant information within the CRM platform.



If there is only 1 Tenant in the property, the Tenancy should be terminated from the 3 dot menu in the Tenancy screen and a new tenancy started fresh. The following process should only be used if there are multiple tenants in a tenancy and some are moving out.



Tip! If you are creating a new Tenancy for an existing tenant that is moving from one property to another, it is best practice to create new applicant record and tenant. This gives the 'new' applicant a different ID number in CRM and reduces the risk of data being confused and mixed when rents are being collected.

1

Navigate to the Tenancy you are managing. In the Left menu select **"Tenants"** and you will see the tenants in the property.

The screenshot displays the 'iam property' CRM interface. At the top, there's a navigation bar with 'My day', 'Lettings', 'Sales', 'Accounts', 'Reporting', and 'Communications'. A left sidebar menu is visible with 'Tenants' selected. The main content area shows a property overview for '9099 Pelaw Crescent, Chester le Street' with a 'Live' status. Below this are filters for 'Reference', 'Negotiator' (Training Dave), 'Branch' (Morgan & Co), and 'Status' (Current). There are two main action buttons: '+ Manage Tenants' and '+ New Permitted Occupier'. A search and sort section is also visible. Two tenant cards are displayed, both for 'Lettings Applicant211' with contact details 'zagg.dave@gmail.com' and '078855255222'.



Alert! If the Tenant you are removing is the primary tenant i.e. has the 'blue' star next to the name. The Primary tenancy needs to be moved to the existing tenant.

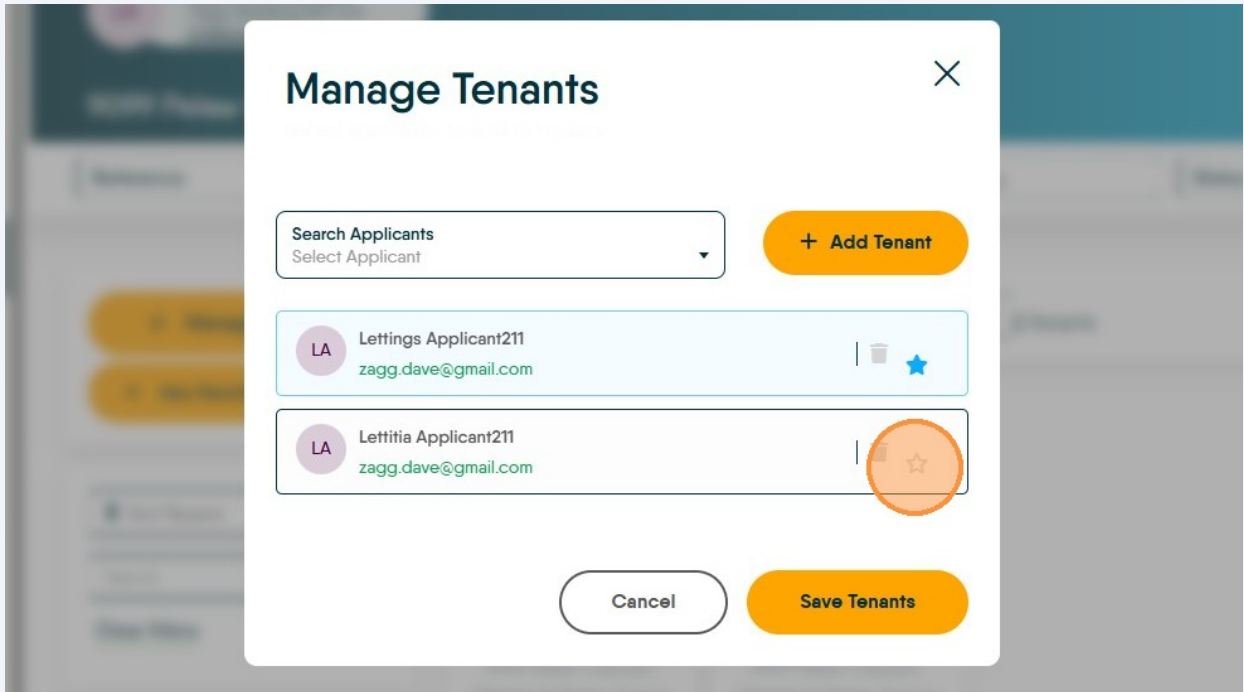
## 2 Changing the Primary Tenant flag.

## 3 Click "Manage Tenants"

The screenshot displays the 'iam property' software interface. On the left is a sidebar with navigation options: Details, Tenants, Checklist, Renewals Checklist, Compliance, Rent Insurance, Information, Documents, and Journal. The main content area shows a property overview for '9099 Pelaw Crescent, Chester le Street'. At the top, there are summary statistics: Total Rent (£1600.00), Total Deposit (£1846.00), and Status (Live). Below this, there are filters for Reference, Negotiator (Training Dave), Branch (Morgan & Co), and Status (Current). The 'Manage Tenants' section is highlighted with an orange circle around the '+ Manage Tenant' button. Below this, there are controls for sorting and searching tenants. A list of tenants is shown, with two entries for 'Lettings Applicant211' and 'Letitia Applicant211'. The first entry has a blue star next to its name, indicating it is the primary tenant. The address for both is '9099 Pelaw Crescent, Chester le Street, County...'.

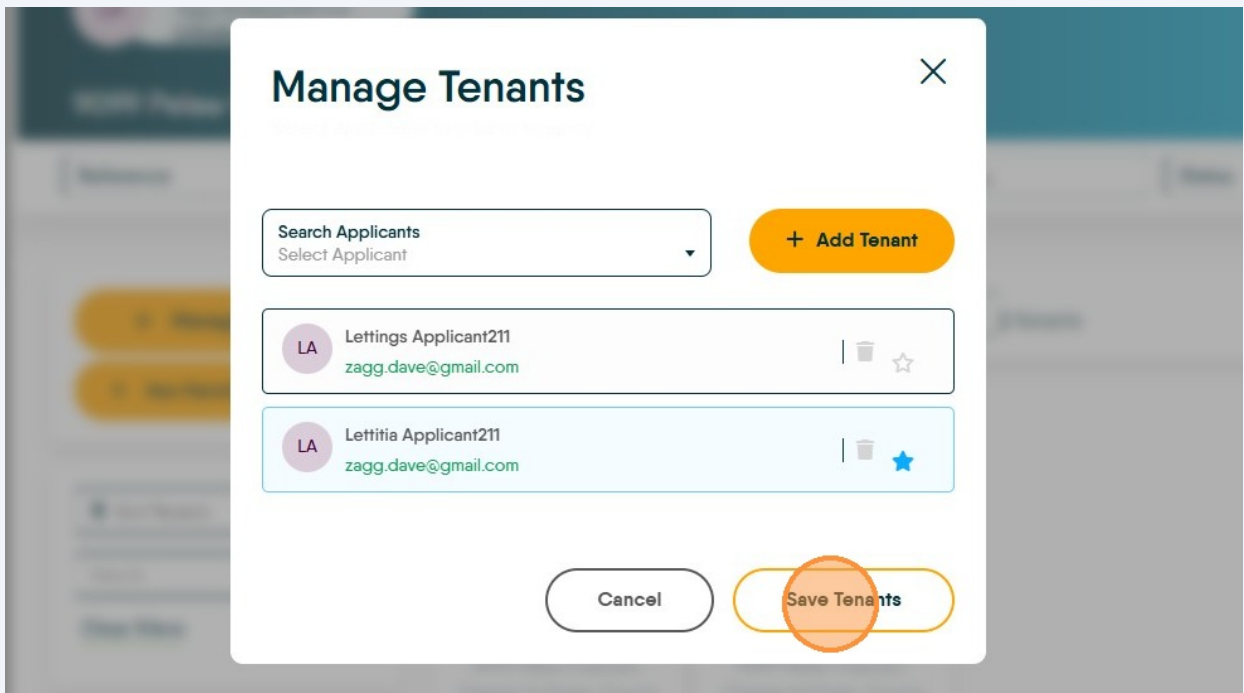
4

Click on the 'empty' star next to the Tenant who is taking over as the Primary tenant. This will turn blue to show the transfer has been done.



5

Click "Save Tenants" this will return you to the Tenancy screen.



## 6 Removing the Tenant from the Tenancy

7 On the Tenant that is leaving the tenancy. Click **"View Tenant"** this will take you to the Tenant record

The screenshot displays a software interface for property management. On the left is a sidebar menu with options: Details, Tenants, Checklist, Renewals Checklist, Compliance, Rent Insurance, Information, Documents, Journal, and E-Sign. The main area shows property details for '9099 Pelaw Crescent, Chester le Street'. A summary bar at the top indicates 'Total Rent £1600.00' and 'Total Deposit £1846.00'. Below this, there are filters for Reference, Negotiator (Training Dave), Branch (Morgan & Co), and Status (Current). A 'Manage Tenants' section contains buttons for '+ Manage Tenants' and '+ New Permitted Occupier', along with a 'Sort Tenants' dropdown, a search box, and a 'Clear filters' link. Two tenant cards are displayed, each with a profile picture (LA), name, email (zagg.dave@gmail.com), phone number (07885255222), and address. The first card has a star icon and a 'View Tenant' button circled in orange. The second card also has a 'View Tenant' button.

8 In the Tenant Record. Click here.

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Accounts Reporting Communications

My account

Warning Set GDPR Tenancy Expiry 301 Days Tenancy→

Primary Tenant

Negotiator: Training Dave Branch: Morgan & Co Status: Live - Periodic

Deposit Holding Deposit Collection Day Next Rent Due

9 From the menu click "Remove From Tenancy"

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Accounts Reporting Communications

My account

Warning Set GDPR Tenancy Expiry 301 Days Tenancy→

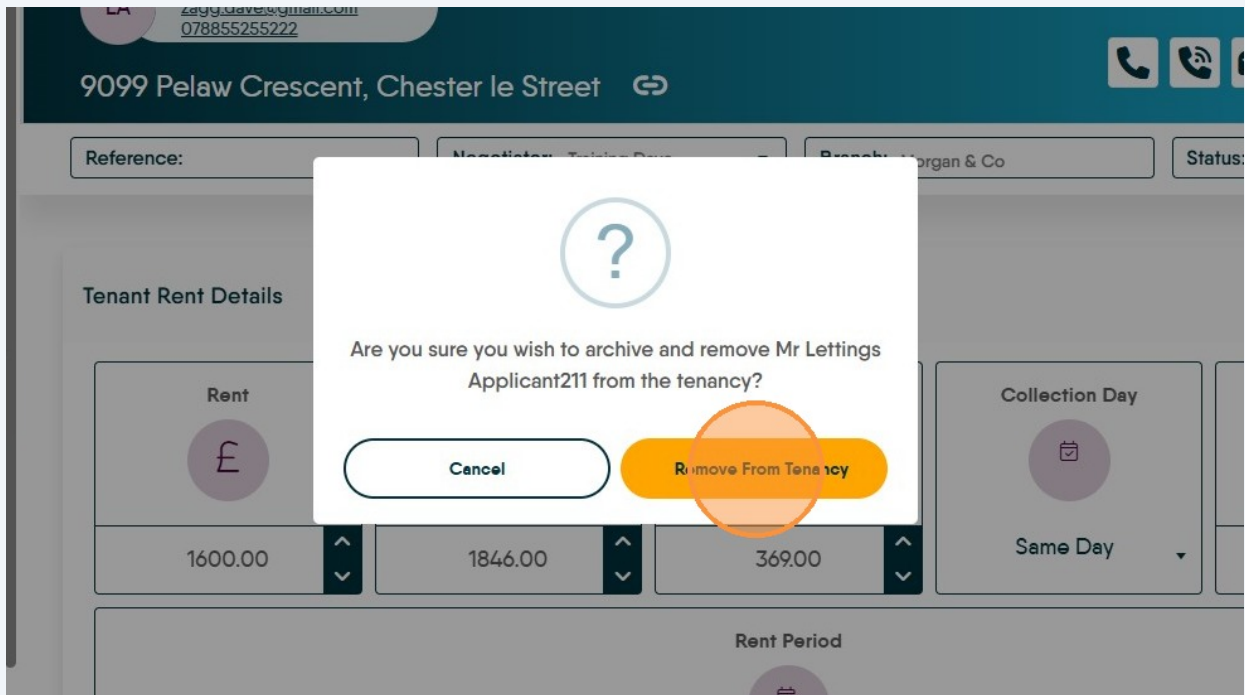
Primary Tenant

Negotiator: Training Dave Branch: Morgan & Co Status: Live - Periodic

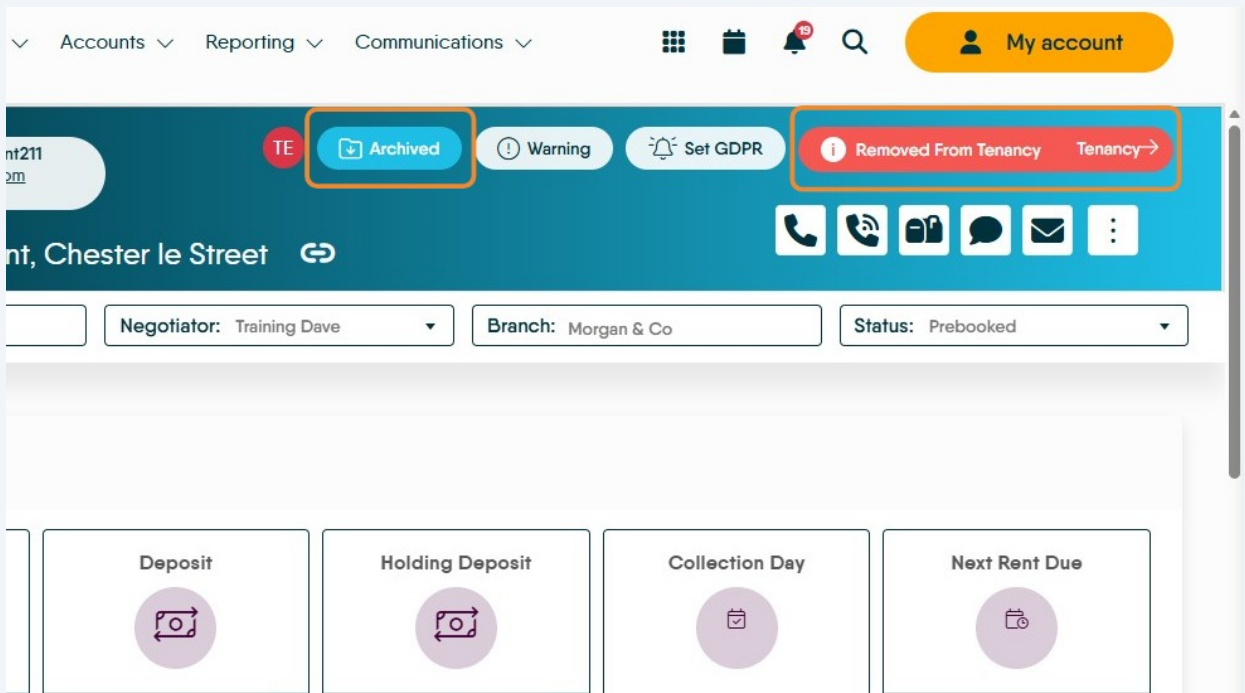
Deposit Holding Deposit Collection Day Next Rent Due

Send SMS Send Email Send Group SMS (Tenancy) Send Group Email (Tenancy) Create Brochure, Report remove from tenancy E-Sign

10 Click **"Remove From Tenancy"**



11 The Tenant Record will now show as **"Archived"** and **Removed from Tenancy** will show.



12 To return to the Tenancy. Click "Tenancy"

The screenshot shows a software interface with a navigation bar at the top. On the left, there are dropdown menus for 'Reporting' and 'Communications'. In the center, there are icons for a grid, a calendar, a notification bell with '15', and a search icon. On the right, there is a yellow button labeled 'My account'. Below the navigation bar is a teal header area containing several buttons: 'TE', 'Archived', 'Warning', 'Set GDPR', 'Removed From Tenancy', and 'Tenancy' (circled in orange). Below this header is a white area with a search bar containing 'le Street' and a refresh icon. Below that are three dropdown menus: 'Negotiator: Training Dave', 'Branch: Morgan & Co', and 'Status: Prebooked'. At the bottom, there are four buttons: 'Deposit', 'Holding Deposit', 'Collection Day', and 'Next Rent Due'.

13 Click "Tenants"

The screenshot shows a software interface with a sidebar on the left and a main content area on the right. The sidebar has a 'Details' button with a house icon, a 'Tenants' button with a person icon (circled in orange), and several checklist items: 'Checklist', 'Renewals Checklist', and 'Compliance'. The main content area has a teal header with a tenant card for 'Letitia Applicant211' with contact details: 'zagg.dave@gmail.com' and '07852655222'. Below the header is the address '9099 Pelaw Crescent, Chester le Street' with a refresh icon. Below that are two dropdown menus: 'Reference' and 'Negotiator Training Dave'. At the bottom, there is a 'Tenancy Dates' section with two buttons: 'Tenancy Start' (blue circle with calendar icon) and 'Tenancy End' (pink circle with calendar icon).

14

The Tenants will show, the primary tenant will be live and the one you have just removed from the tenancy will show as archived

The screenshot shows a web interface for managing tenants. At the top, there are filters for Reference, Negotiator (Training Dave), Branch (Morgan & Co), and Status (Current). Below the filters, there are two orange buttons: '+ Manage Tenants' and '+ New Permitted Occupier'. To the left, there is a 'Sort Tenants' dropdown menu, a search bar, and a 'Clear filters' link. On the right, there are two tenant cards. The first card is for 'Letitia Applicant211' with contact details 'zagg.dave@gmail.com' and '07852655222', and address '9099 Pelaw Crescent, Chester le Street, County...'. The second card is for 'Lettings Applicant211' with the same contact details and address, but it has a red 'Archived' label at the top. Both cards have a 'View Tenant' button at the bottom.



Alert! Remember to edit any rent splits that were set when the tenancy was created. This is done in the Tenant record. If not done this will cause issue with rent invoices being created.

15

## Adding New Tenants

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The new tenant can be added to the tenancy either from an 'applicant' as Pre Booked tenant and then added to this tenancy or, added straight to this tenancy following the process below.

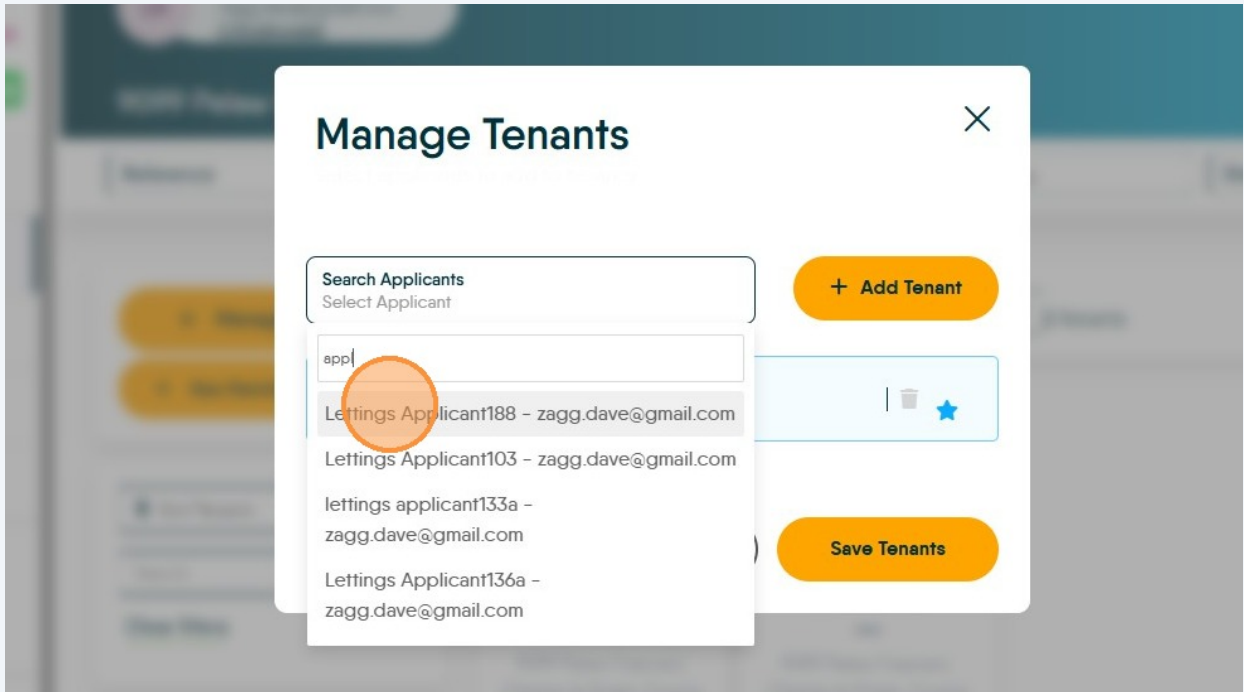
17 From the Tenancy Record. Click **"Manage Tenants"**

The screenshot shows the 'iam property' software interface. On the left is a navigation menu with options: Details, Tenants, Checklist, Renewals Checklist, Compliance, Rent Insurance, Information, Documents, and Journal. The main area displays a tenancy record for '9099 Pelaw Crescent, Chester le Street'. At the top of this record, there is a 'Manage Tenants' button with a red circle around it. Other buttons include 'New Permitted Occupier', 'Sort Tenants', and a search field. Below these are two tenant cards, one of which is marked 'Archived'. The top navigation bar includes 'My day', 'Lettings', 'Sales', 'Accounts', 'Reporting', and 'Communications'.

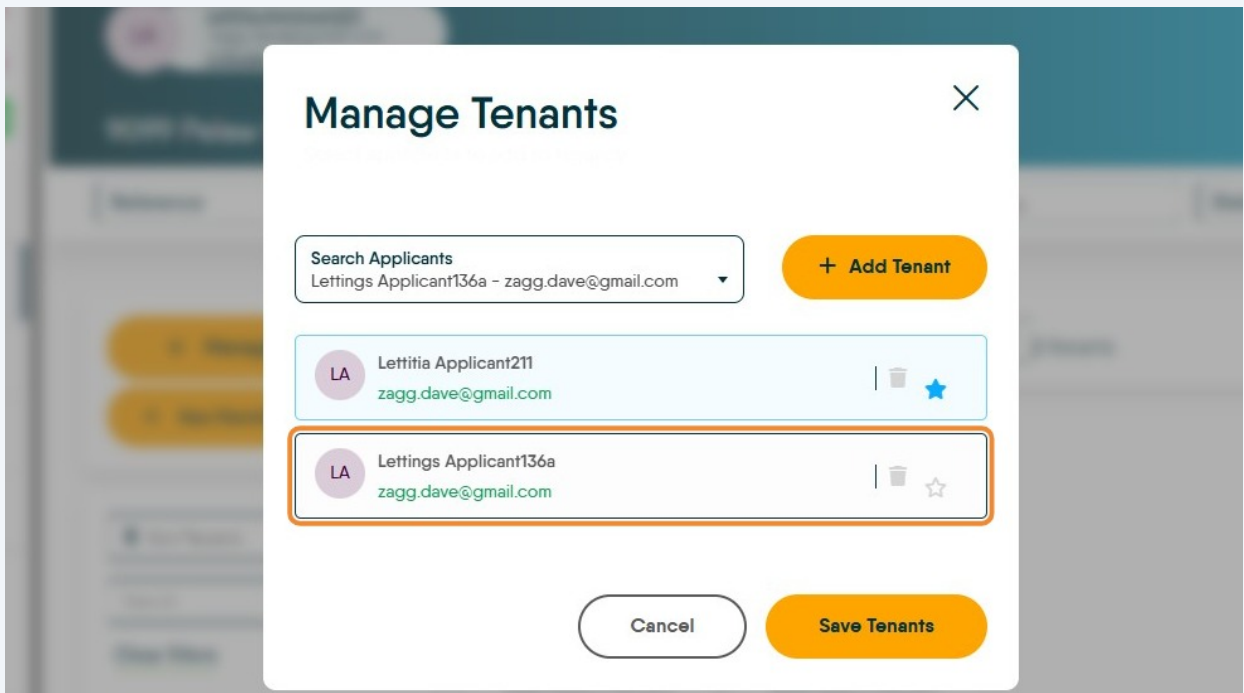
18 Click **"Select Applicant"** from the search field find and select the previously created record. (e.g. the applicant is already a pre-booked tenant or applicant record in CRM)

The screenshot shows a 'Manage Tenants' modal window. At the top, it says 'Manage Tenants' with a close button (X). Below this is a search field labeled 'Search Applicants' with a dropdown arrow. The text 'Select Applicant' is visible below the search field, and this area is highlighted with a red circle. To the right of the search field is a '+ Add Tenant' button. Below the search field is a list of search results, with the first one being 'LA Letitia Applicant211 zagg.dave@gmail.com'. At the bottom of the modal are 'Cancel' and 'Save Tenants' buttons.

19 Click "New Tenant "



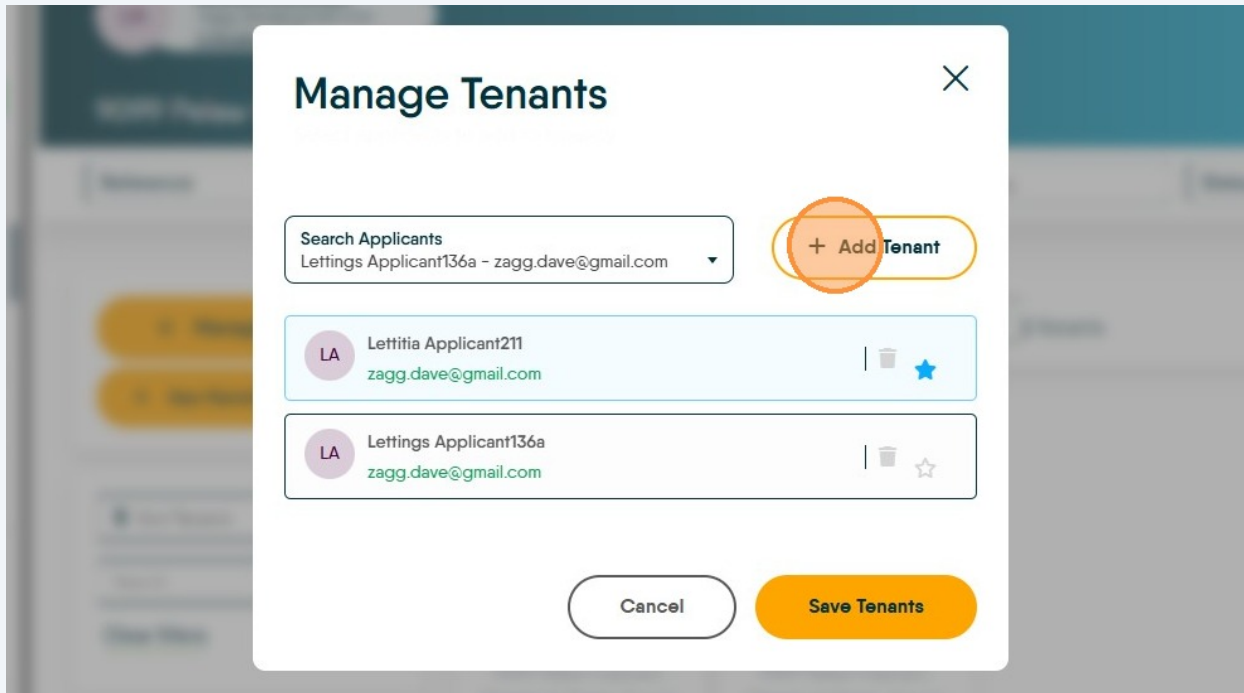
20 The record will show on the screen.





Tip! Remember to click 'Save Tenants'

**21** To add a new tenant that is **NOT** currently in CRM. Click **"Add Tenant"**



22

In the (blank) Tenant record scroll down and complete all the personal data that is required.

**Remember to update the Rent and deposit information** at the top of the screen to ensure Rent Invoices are created correctly.

Then **Save** the record

The screenshot shows a form for creating a new tenant record. At the top, there's a dropdown menu set to 'Monthly' and a '£ 0.00' label. Below this, the form is divided into two main sections: 'Personal Information' and 'Additional Information'. The 'Personal Information' section includes fields for Title, Forename, Surname, Company Name, Website, Phone Number, Mobile phone, Email Address, Salutation, Date of Birth, and Age. There are also checkboxes for 'Tenant doesn't have an email address' and a 'Source Advert' dropdown. The 'Additional Information' section includes fields for Occupation, Employer, NI Number, Agreement Name, Rent Review, Rent Type, Automatically Rent Inv., Use Alternate Address, Housing Benefit, and Case Number. There are also two sections for 'Hb charged ahead' and 'Hb charged arrears' with checkboxes and explanatory text. At the bottom right, there's a 'Quality Assurance' section with a warning icon.

23

The new Tenant record will automatically show on the screen.

The screenshot shows a list of tenants for the property '9099 Pelaw Crescent, Chester le Street'. The list includes four tenant cards. The first three cards are for 'Letitia Applicant211', 'Lettings Applicant136a', and 'Lettings Applicant211'. The fourth card, for 'Tester TestApplicant', is highlighted with an orange border. Each card shows the tenant's name, email address, phone number, and address. There are also buttons for 'Manage Tenants', 'New Permitted Occupier', and 'Sort Tenants'. A 'Warning' icon is visible in the top right corner.