

Letzone - Completing a Tenancy Application in the CRM



Follow this guide to successfully navigate the Letzone module in CRM and complete all necessary steps for a tenancy application. Learn how to add applicant details, manage documents, and generate agreements.



This is a long guide, however the process is one you will dip in and out of as notifications happen and items need to be updated or sent etc.

1

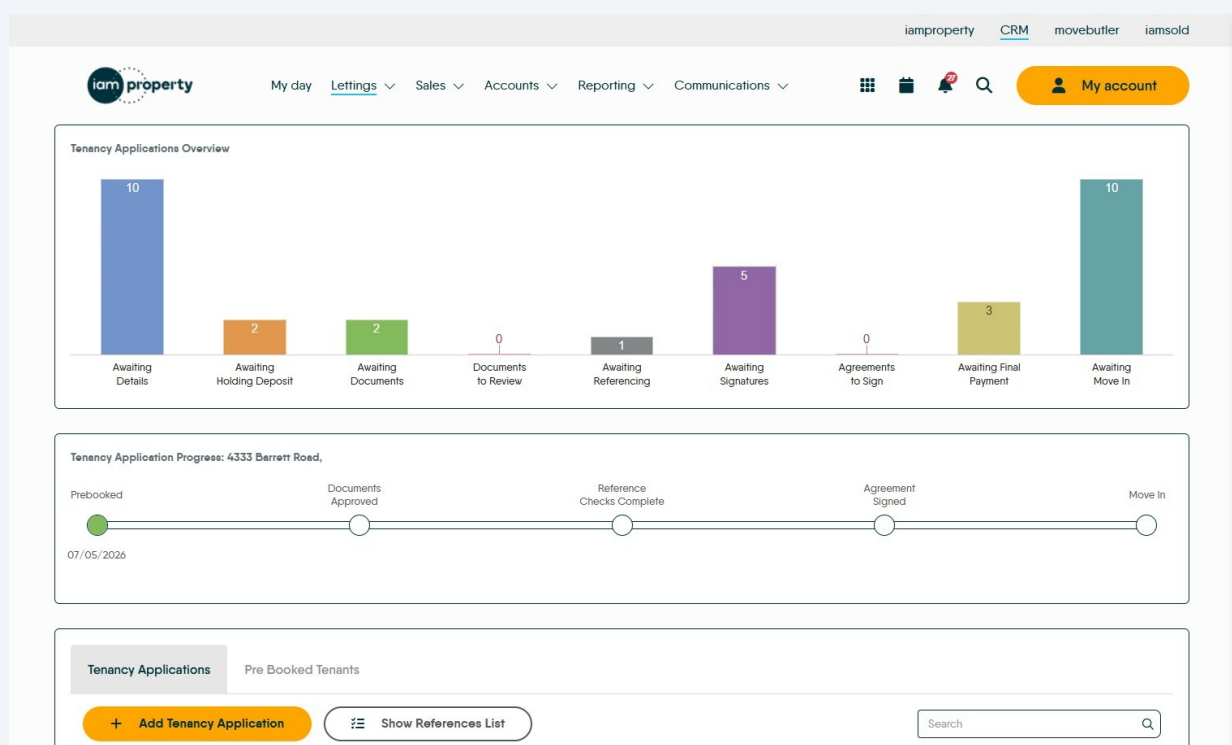
Navigate to <https://crm.iamproperty.com/Dashboards/LetZoneDashboard>

From this screen you have full visibility of all the Tenancy applications started in CRM, whether from within the Letzone or from a property/applicant record.

Tenancy Applications Overview; Shows an overview of all the applications held Letzone, in a graphical form, showing how many records are at each stage.

Tenancy Application Progress {Property Address}; Show the progress for a particular property you have selected in the 'Tenancy Applications' screen.

If a Tenancy Application is started in the Letzone (as shown below) then the Applicant will automatically be sent a link to access the Letzone portal to add in their details, answer any qualifying questions and upload documents.



2

If a tenancy is started from the applicant or property record and you want to use Letzone to process it, you will need to send the welcome email. These can be identified as they do not have an Application Start date in the info line.

This screen will also allow you to review the progress of the tenancy application.

Tenancy Applications Pre Booked Tenants							
+ Add Tenancy Application		☰ Show References List					
	Tena...	Prim...	Gua...	App...	Det...	Hol...	Risk...
⋮	7725 Pelaw C	tenant...		2026-...	✓	2026-...	Low
⋮	7725 Pelaw C	Ms Let...		2026-...	✓	2026-...	—
⋮	7665 Pelaw C	Letting...		2026-...	→	—	—
⋮	712 Pelaw Cr	Mrs Pa...			—	—	—
⋮	Bedroom 9, 4	Mr Lett...	✓	2026-...	✓	2026-...	Skipped
⋮	7240 Pelaw C	Letting...			—	—	—
⋮	760 Pelaw C	Letting...			—	—	—

3 To send the Letzone invite to a tenancy that was NOT started in Letzone.

Click here.

Tenancy Applications		Pre Booked Tenants						
+ Add Tenancy Application		☰ Show References List						
	Tena...	Prim...	Gua...	App...	Det...	Hol...	Doc...	Ris...
⋮	913 Pelaw Cr	Letting...			—	—	—	—
⋮	4333 Barrett	Mr Lett...			—	—	—	—
⋮	59 Kingsway,	Mr Dav...		2026-...	✓	→	—	—
⋮	90888 Pelaw	Mr Lett...		2026-...	✓	2026-...	✓	Low
⋮	80111 Pelaw	Mr letti...			—	—	—	—
⋮	7251 Pelaw C	Letting...		2026-...	→	—	—	—
⋮	Bedroom 1, 2	Ms Let...		2026-...	✓	2026-...	✓	Skij

4 Click "Start Tenancy Application"

Tenancy Applications		Pre Booked Tenants						
+ Add Tenancy Application		☰ Show References List						
	Tena...	Prim...	Gua...	App...	Det...	Hol...	Doc...	Ris...
⋮	913 Pelaw Cr	Letting...			—	—	—	—
⋮	4333 Barrett	Mr Lett...			—	—	—	—
⋮	59 Kingsway,	Mr Dav...		2026-...	✓	→	—	—
⋮	90888 Pelaw	Mr Lett...		2026-...	✓	2026-...	✓	Low
⋮	80111 Pelaw	Mr letti...			—	—	—	—
⋮	7251 Pelaw C	Letting...		2026-...	→	—	—	—
⋮	Bedroom 1, 2	Ms Let...		2026-...	✓	2026-...	✓	Skij
⋮	712 Pelaw Cr	Lady L...		2026-...	✓	→	✓	—

5 The Invite is now sent and the Application Start date will show.

Tenancy Applications		Pre Booked Tenants					
+ Add Tenancy Application		☰ Show References List					
Tena...	Prim...	Gua...	App...	Det...	Hol...	Doc...	
⋮ 4333 Barrett	Mr Lett...		2026-...	➔	—	—	
⋮ 913 Pelaw Cr	Letting...			—	—	—	
⋮ 59 Kingsway,	Mr Dav...		2026-...	✓	➔	—	
⋮ 90888 Pelaw	Mr Lett...		2026-...	✓	2026-...	✓	
⋮ 80111 Pelaw	Mr Letti...			—	—	—	
⋮ 7251 Pelaw C	Letting...		2026-...	➔	—	—	

Add Tenancy Application

6 To start a tenancy in Letzone. Click "Add Tenancy Application"

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Tenancy Applications		Pre Booked Tenants								
+ Add Tenancy Application		☰ Show References List								
Tena...	Prim...	Gua...	App...	Det...	Hol...	Doc...	Risk...	Qual...	Refe...	Sign...
⋮ 7725 Pelaw C	tenam...		2026-...	✓	2026-...	✓	Low	✓ Low	✓	➔
⋮ 7725 Pelaw C	Ms Let...		2026-...	✓	2026-...	✓	—		✓	✓
⋮ 7665 Pelaw C	Letting...		2026-...	➔	—	—	—		—	—
⋮ 712 Pelaw Cr	Mrs Pa...			—	—	—	—		—	—
⋮ Bedroom 9,4	Mr Lett...	👤	2026-...	✓	2026-...	✓	Skipped		✓	✓
⋮ 7240 Pelaw C	Letting...			—	—	—	—		—	—
⋮ 712 Pelaw Cr	Letting...			—	—	—	—		—	—

7

Click **"Select Property"** and add the property details, after 3 characters the CRM will start to show matching records.

Click the blue plus icon to add a new property to CRM.

If required, select the room being rented from **"Select Room"**

Any **'Tenancy' User Defined Fields** that are set in CRM will show on the screen.

The screenshot shows a modal window titled "Add new Tenancy Application" with a close button (X) in the top right corner. The form contains several input fields and buttons:

- Select Property:** A text input field with a blue plus icon in a circle to its right. This field is highlighted with an orange box.
- Select Room:** A dropdown menu with a downward arrow. This field is also highlighted with an orange box.
- Select a Property:** A text input field below the "Select Property" field.
- Select Applicant:** A text input field with a blue plus icon in a circle to its right.
- Select an Applicant:** A text input field below the "Select Applicant" field.
- User Defined Fields:** A section containing a text input field labeled "Special Conditions". This section is highlighted with an orange box.
- Buttons:** A blue "Add" button is located to the right of the "Select Applicant" field. At the bottom of the modal are two buttons: a grey "Cancel" button and an orange "Save" button.

8

Once the Property is added, the details for the applicant can be added. Click **"Select Applicant"** and type the name, CRM will start showing matched records after 3 characters have been added. Clicking the 'blue +' will allow a totally new applicant to be added to CRM.

The screenshot shows a modal window titled "Add new Tenancy Application" with a close button (X) in the top right corner. The form contains the following fields and elements:

- Select Property:** A dropdown menu showing "7599 Pelaw Crescent, Chester le Street, County Durham, DH2 2HX, UK".
- Select Room:** A dropdown menu showing "Not Applicable".
- Applicant Details:** A section showing "Mr David Vendor32" with contact information: "7599 Pelaw Crescent, Chester le Street, County Durham, DH2 2HX, UK", "Mobile: 07852325002", and "Email: zagg.dave1@gmail.com". Below this are icons for phone, chat, email, and a profile icon.
- Select Applicant:** A text input field with a blue "+" icon on the right. This field is highlighted with an orange rectangular box.
- Select an Applicant:** A placeholder text below the input field.
- Buttons:** "Cancel" (white) and "Save" (orange) buttons at the bottom.

9

Click **"Add"** to add the applicant to the Tenancy, repeat this process to add additional tenants to the tenancy application for this property.

This screenshot shows the same "Add new Tenancy Application" modal window, but with the "Select Applicant" field populated with "Lettings applicant130 - zagg.dave@gmail.com". The blue "+" icon on the right of the input field is now a blue circle with a white "+" sign, which is highlighted with an orange circular callout. The "Save" button remains orange, while the "Cancel" button is white.

10 Click "Save" to save the tenancy application

Add new Tenancy Application ✕

Select Property
7599 Pelaw Crescent, Chester le Street, County Durham, DH2 2HX, UK

Select Room
Not Applicable

Mr David Vendor32
7599 Pelaw Crescent, Chester le Street, County Durham, DH2 2HX, UK
Mobile: 07852325002 Email: zaggy.dave1@gmail.com

Select Applicant

1. Ms Lettings applicant130

Cancel Save

11 The **Tenancy Application** will then show on the screen, the applicants will be sent a link to a portal where they will be able to update their personal details, answer qualifying questions and upload their personal documents.

The Tenancy Application screen shows the property and the Primary tenant.

The individual tenants details will show in the '**Pre Booked Tenant**' screen

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Tenancy Applications Pre Booked Tenants

+ Add Tenancy Application Show References List Search

Tenancy Application	Primary Tenant	Guarantor	Application Start	Details	Holding Deposit
7240 Pelaw Crescent,	Lettings Applicant205		2026-03-10	→	—
7725 Pelaw Crescent,	tenant1210		2026-03-05	✓	2026-03-10
7725 Pelaw Crescent,	Ms Lettings Applicant136		2026-03-04	✓	2026-03-05
7665 Pelaw Crescent,	Lettings Applicant207		2026-03-04	✓	2026-03-10
712 Pelaw Crescent,	Mrs Pauline Morgan			—	—
Bedroom 9.63 Woodland Road,	Mr Lettings Applicant206	✓	2026-02-09	✓	2026-02-09
712 Pelaw Crescent,	Lettings Appliojcat2020			—	—
7251 Pelaw Crescent,	Lettings Applicant201			—	—

12

Click **"Pre Booked Tenants"** to show the individual tenant details, this screen will show all the individual tenants in a property and is where anything specifically related to the tenant is managed.

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Please select a prebooked tenant to refresh

Tenancy Applications **Pre Booked Tenants**

+ Add Applicant Search

Applic...	Guara...	Details	Holdin...	Docu...	Risk A...	Quality...	Refere...	Signat...	Final P...
Miss Lettings /		→	—	—	—	—	—	—	—
Mr Lettings Ap		✓	2026-06...	✓	Skipped	Acce...	✓	✓	2026-06
Miss letting Ap	✓	—	—	—	—	—	—	—	—
Mr Lettings Ap		→	—	—	—	—	—	—	—
Mr jj Applicant		→	—	—	—	—	—	—	—
Mr David Morc		✓	2026-06...	→	—	—	—	—	—
Mr lettings ap		—	—	—	—	✗ Poor	—	—	—

13

If required, click **"Add Applicant"** to add a new applicant.

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Please select a prebooked tenant to refresh

Tenancy Applications **Pre Booked Tenants**

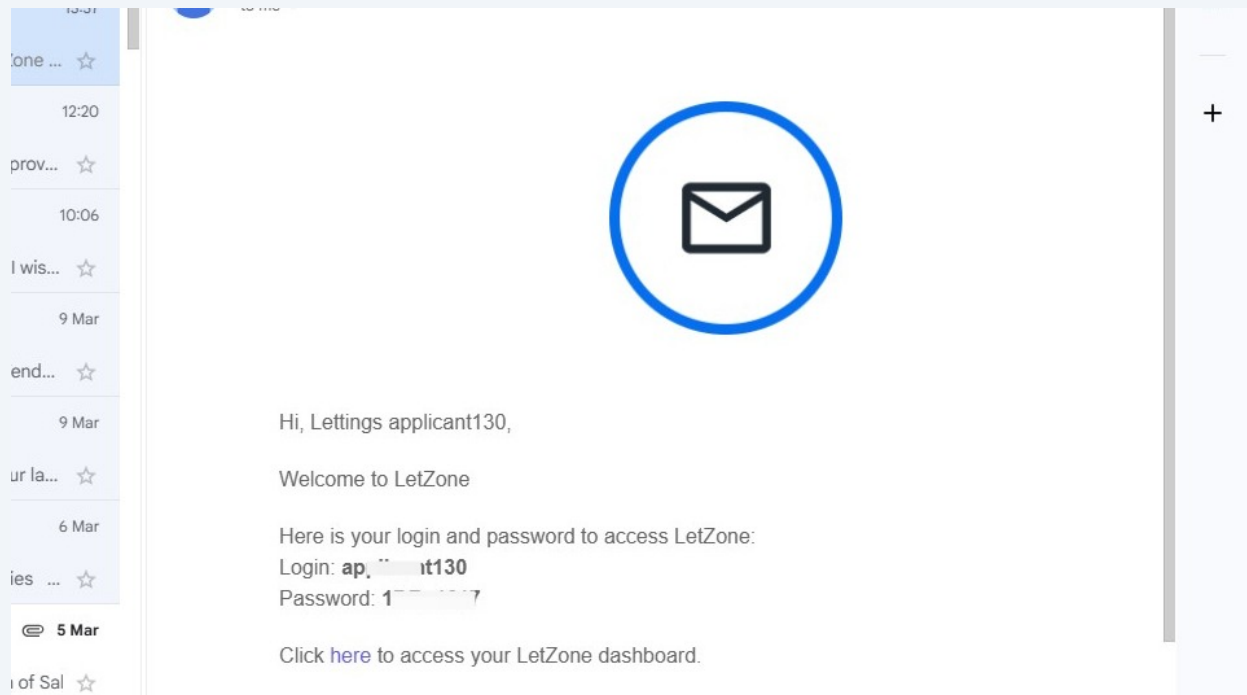
+ Add Applicant Search

Applicant	Guarantor	Details	Holding Deposit	Documents	Risk Assessment/Credit Check
Miss Lettings Applicant31		→	—	—	—
Mr Lettings Applicant253		✓	2026-06-26	✓	Skipped
Miss Letting Applicant110	✓	—	—	—	—
Mr Lettings Applicant257		→	—	—	—
Mr jj Applicant257a		→	—	—	—
Mr David Morgan		✓	2026-06-19	→	—
Mr lettings applicant		—	—	—	—

Letzone Portal

14

The invite email that the applicant receives will look like this. The email will include a username and a password, as well as a link to the portals. A guide to the portal is available [here](#)



15

At this point there is nothing for the agent to do until the notifications are received informing that the applicant has completed their personal details and uploaded their 'Right to Rent' documents.

Notifications will be received in the 'Bell' icon at the top of the screen and, depending on configuration, also by email.



LetZone

✓10/Mar/2026

Document submitted by Tenant :

Lettings Applicant205

Document Type: A current or
expired passport showing British
Citizenship or citizen of UK &
Colonies with "right of abode"



Lettings Applicant205

LetZone

✓10/Mar/2026



Name	Priority	Start date	D
<u>Call Audrey</u>	⬆ High	08/Oct/2025	0



LetZone

✓10/Mar/2026

Details completed and The
tenant has completed their
details: Lettings Applicant205



Lettings Applicant205

LetZone

✓10/Mar/2026



LetZone

✓05/Mar/2026



Name

Priority

Start date

16

When the personal details have been updated the **'Details'** column will show a green tick instead of the original blue arrow.

Once the **'Documents'** are uploaded there will be an orange triangle to show documents have been uploaded and need to be approved.

Please select a tenancy application to refresh

Tenancy Applications		Pre Booked Tenants					
+ Add Tenancy Application		Show References List		Search			
Tenancy Application	Primary Tenant	Guarantor	Application Start	Details	Holding Deposit	Documents	
7240 Pelaw Crescent,	Mr Lettings Appli...		2026-03-10	✓	→	⚠	
7725 Pelaw Crescent,	tenant210		2026-03-05	✓	2026-03-10	✓	
7725 Pelaw Crescent,	Ms Lettings Appli...		2026-03-04	✓	2026-03-05	✓	
7665 Pelaw Crescent,	Lettings Applica...		2026-03-04	✓	2026-03-10	✓	
712 Pelaw Crescent,	Mrs Pauline Morgan			—	—	—	
Bedroom 9 63 Woodland Ro...	Mr Lettings Appli...	✓	2026-02-09	✓	2026-02-09	✓	
712 Pelaw Crescent,	Lettings Appli...			—	—	—	
7251 Pelaw Crescent,	Lettings Applica...			—	—	—	
8973 Pelaw Crescent,	Mr Lettings Tenna...			—	—	—	

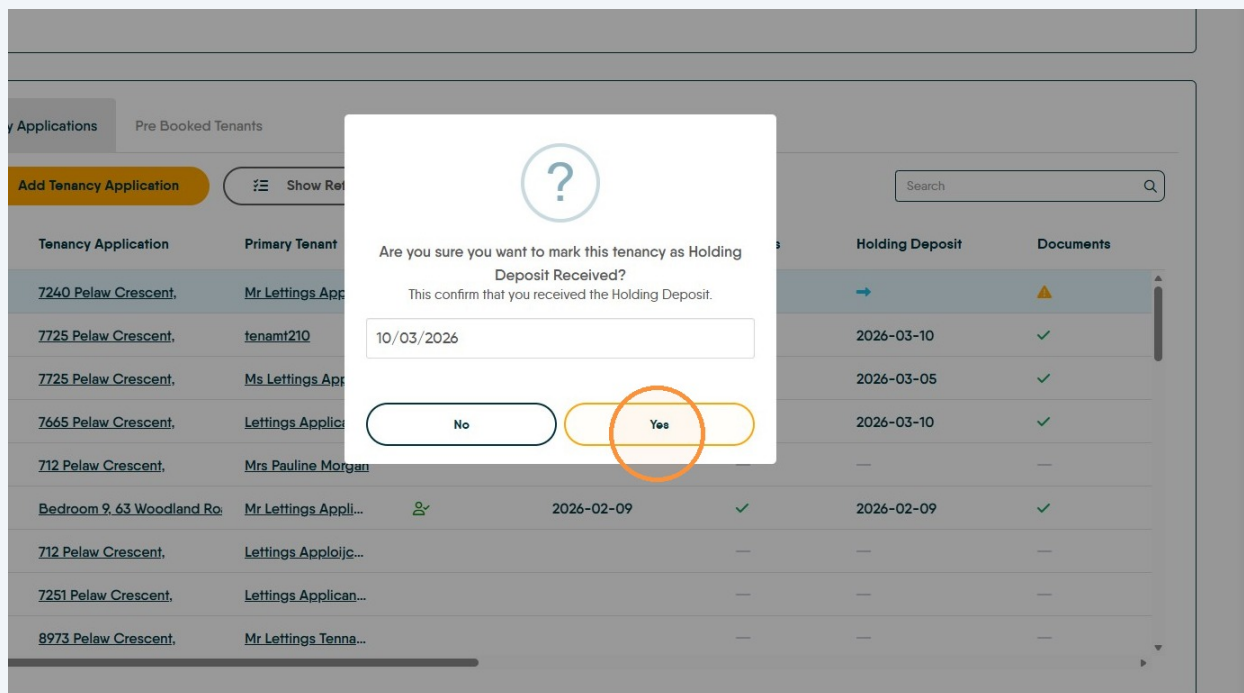
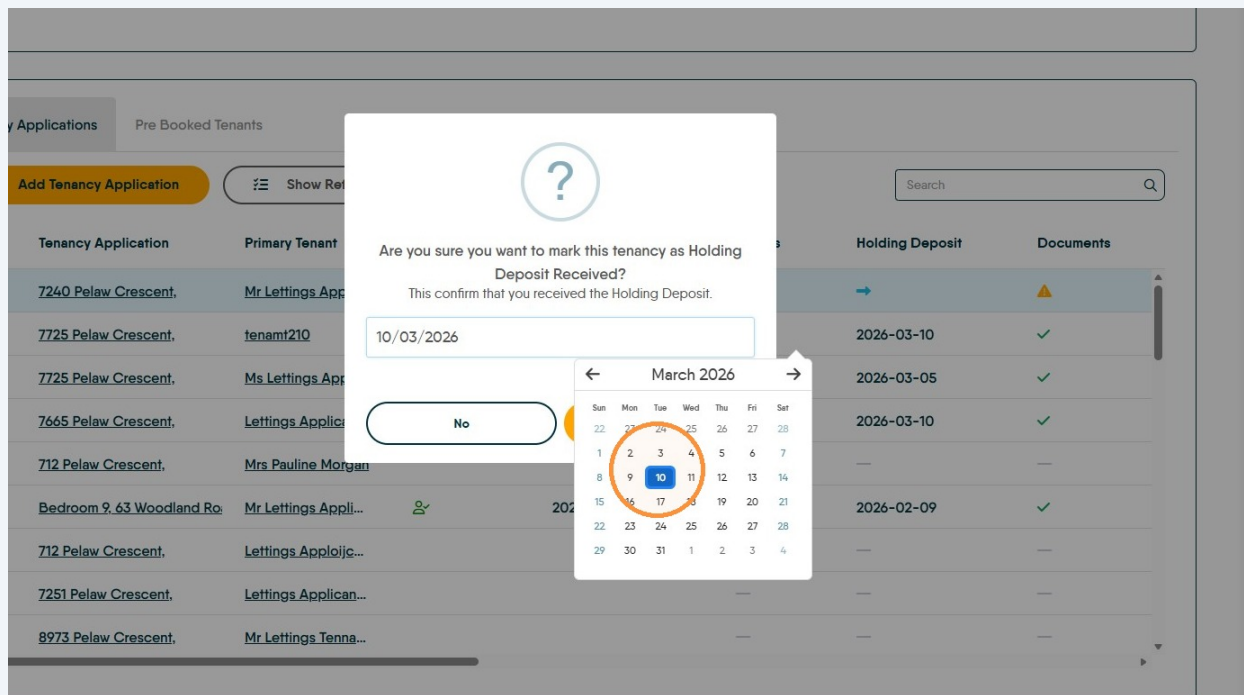
Noting Holding Deposit Received

17 To mark that the **holding deposit** has been received, click the 3 dots.

Tenancy Applications		Pre Booked Tenants			
+ Add Tenancy Application		☰ Show References List			
	Tenancy Application	Primary Tenant	Guarantor	Application Start	Det
⋮	7240 Pelaw Crescent,	Mr Lettings Appli...		2026-03-10	✓
⋮	7725 Pelaw Crescent,	tenamt210		2026-03-05	✓
⋮	7725 Pelaw Crescent,	Ms Lettings Appli...		2026-03-04	✓
⋮	7665 Pelaw Crescent,	Lettings Applican...		2026-03-04	✓
⋮	712 Pelaw Crescent,	Mrs Pauline Morgan			—
⋮	Bedroom 9, 63 Woodland Ro.	Mr Lettings Appli...	👤	2026-02-09	✓

18 Click "**Holding Deposit Received**" set the date the payment was received and click "**Yes**". The date will show in the Holding Deposit Column.

Tenancy Applications		Pre Booked Tenants					
+ Add Tenancy Application		☰ Show References List				Search	
	Tenancy Application	Primary Tenant	Guarantor	Application Start	Details	Holding Deposit	Documents
⋮	7240 Pelaw Crescent,	Mr Lettings Appli...		2026-03-10	✓	→	⚠
⋮	7725 Pelaw Crescent,	tenamt210		2026-03-05	✓	2026-03-10	✓
⋮	7725 Pelaw Crescent,	Ms Lettings Appli...		2026-03-04	✓	2026-03-05	✓
⋮	7665 Pelaw Crescent,	Lettings Applican...		2026-03-04	✓	2026-03-10	✓
⋮	712 Pelaw Crescent,	Mrs Pauline Morgan			—	—	—
⋮	Bedroom 9, 63 Woodland Ro.	Mr Lettings Appli...	👤	2026-02-09	✓	2026-02-09	✓
⋮	712 Pelaw Crescent,	Lettings Applican...			—	—	—
⋮	7251 Pelaw Crescent,	Lettings Applican...			—	—	—
⋮	8973 Pelaw Crescent,	Mr Lettings Tenna...			—	—	—



Documents and Qualifying Questions

19

The documents are uploaded by the Tenant in the Letzone portal, however if required they can be uploaded by you from within the Letzone menu. Qualifying Questions are answered in the Letzone Portal by the applicant.

Once you have been notified the Right to Rent documents and Details have been uploaded you can review these from the Tenant Record. To do this follow the steps below.

20

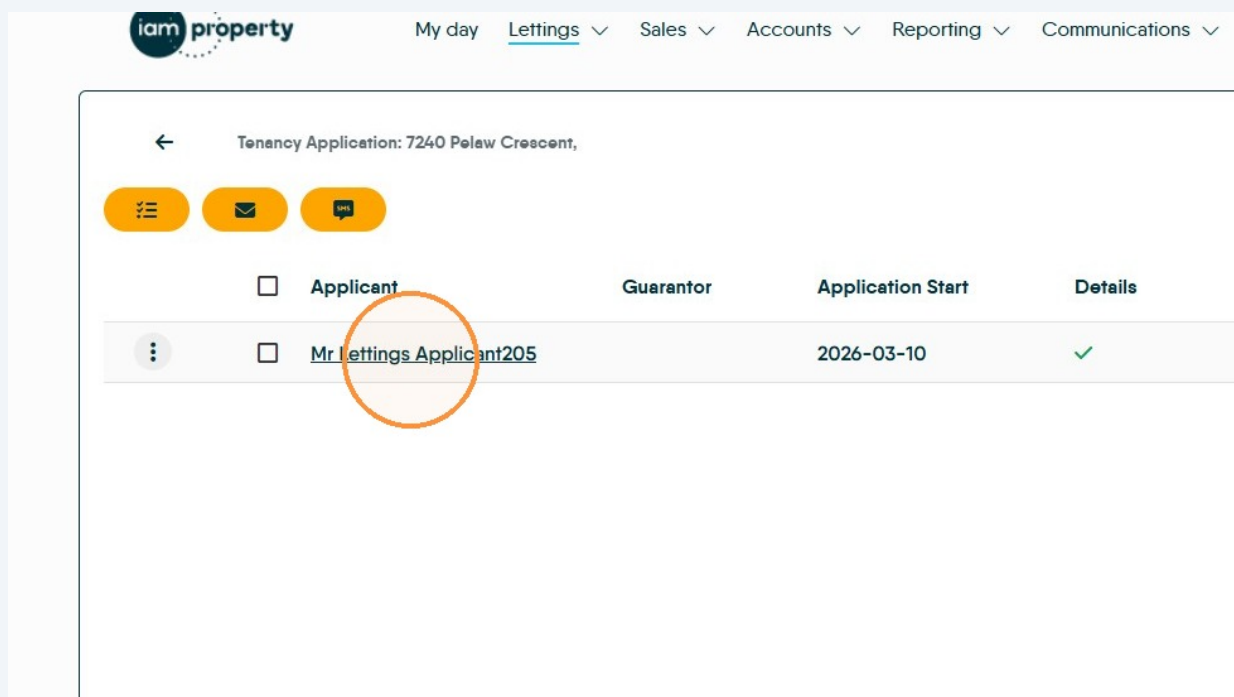
On the Tenancy Applications screen. Click **"Property Address"**

Tenancy Applications					
+ Add Tenancy Application		☰ Show References List			
	Tenancy Application	Primary Tenant	Guarantor	Application Start	Det
⋮	7240 Pelaw Crescent,	Mr Lettings Appli...		2026-03-10	✓
⋮	7725 Pelaw Crescent,	tenant210		2026-03-05	✓
⋮	7725 Pelaw Crescent,	Ms Lettings Appli...		2026-03-04	✓
⋮	7665 Pelaw Crescent,	Lettings Applica...		2026-03-04	✓
⋮	712 Pelaw Crescent,	Mrs Pauline Morgan			—
⋮	Bedroom 9, 63 Woodland Ro.	Mr Lettings Appli...	👤	2026-02-09	✓

21

This will take you to the specific **Tenancy Application** for this property. All applicants for this tenancy will show. Clicking on the Tenant name will take you to the Tenant record for that tenant.

In the tenant record you will be able to review the documents uploaded, in the 'Documents' folder and the Letzone qualification questions, which are in the Letzone menu of the Tenant record.



22

The documents are in the documents tab. Click the Letzone option to review the Qualifying Questions and 'Terms and Conditions' to check if the applicant has accepted the Ts & Cs .

Click **"Qualifying questions"** this will allow you to review the answers to your Qualifying Questions.

Click **"Terms and conditions"** if you have added your Terms and Conditions of Rental then this screen will show if they have been accepted by the applicant. If you have requested the T+C's are accepted and they have not been a warning notice will show on your screen until the conditions are read to the applicant and marked accepted by you.

Click **"Documents"** this will allow you to review the documents uploaded.

Last Contacted

Details

Accounts

Checklist

Financial

Contacts

Documents

letzone

Referencing Checks
(by Vision+)

E-Sign

Journal

Audit

LA

Mr Lettings Applicant205
zagq.dave@gmail.com
07885123123

PB

Warning

Set GDPR

Periodic Tenancy

7240 Pelaw Crescent, Chester le Street

Primary Tenant

Reference:

Negotiator: Training Dave

Branch: Morgan & Co

Status: Prebooked

Tenant Rent Details

Rent	Deposit	Holding Deposit	Collection Day	Next Rent D
£				
1200.00	1200.00	276.00	Same Day	07/03/20

Rent Period

Monthly

Last Contacted

Details

Accounts

Checklist

Financial

Contacts

Documents

letzone

Qualifying questions

Terms and conditions

Referencing Checks
(by Vision+)

E-Sign

Journal

LA

Mr Lettings Applicant205
zagq.dave@gmail.com
07885123123

PB

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Primary Tenant

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Tenant Rent Details

Rent	Deposit	Holding Deposit	Collection Day	Next Rent D
£				
1200.00	1200.00	276.00	Same Day	07/03/20

Rent Period

Monthly

Last Contacted

Details

Accounts

Checklist

Financial

Contacts

Documents

letzone

Qualifying questions

Terms and conditions

Referencing Checks (by Vision+)

E-Sign

Journal

LA

Mr Lettings Applicant205

zagg.dave@gmail.com

07885123123

PB

Warning

Set GDPR

Periodic Tenancy

7240 Pelaw Crescent, Chester le Street

Primary Tenant

Reference:

Negotiator: Training Dave

Branch: Morgan & Co

Status: Prebooked

Qualifying Questions

Do You Smoke

Answer:

No

Are you currently employed?

Answer:

Yes

How many people will be staying in the property, including children.

Answer:

Last Contacted

Details

Accounts

Checklist

Financial

Contacts

Documents

letzone

Qualifying questions

Terms and conditions

Referencing Checks (by Vision+)

E-Sign

Journal

LA

Mr Lettings Applicant205

zagg.dave@gmail.com

07885123123

PB

Warning

Set GDPR

Periodic Tenancy

7240 Pelaw Crescent, Chester le Street

Primary Tenant

Reference:

Negotiator: Training Dave

Branch: Morgan & Co

Status: Prebooked

Terms and Conditions

✓

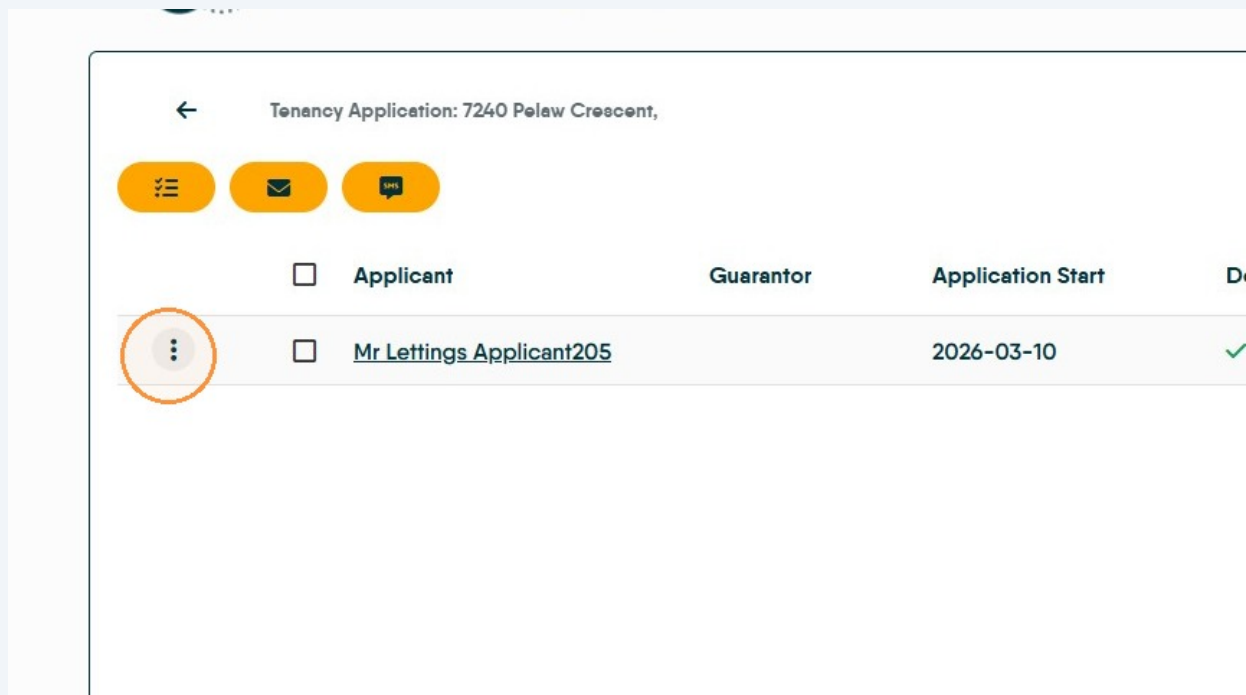
Confirm that I have read these back to the tenant

View full terms & conditions

Download Here

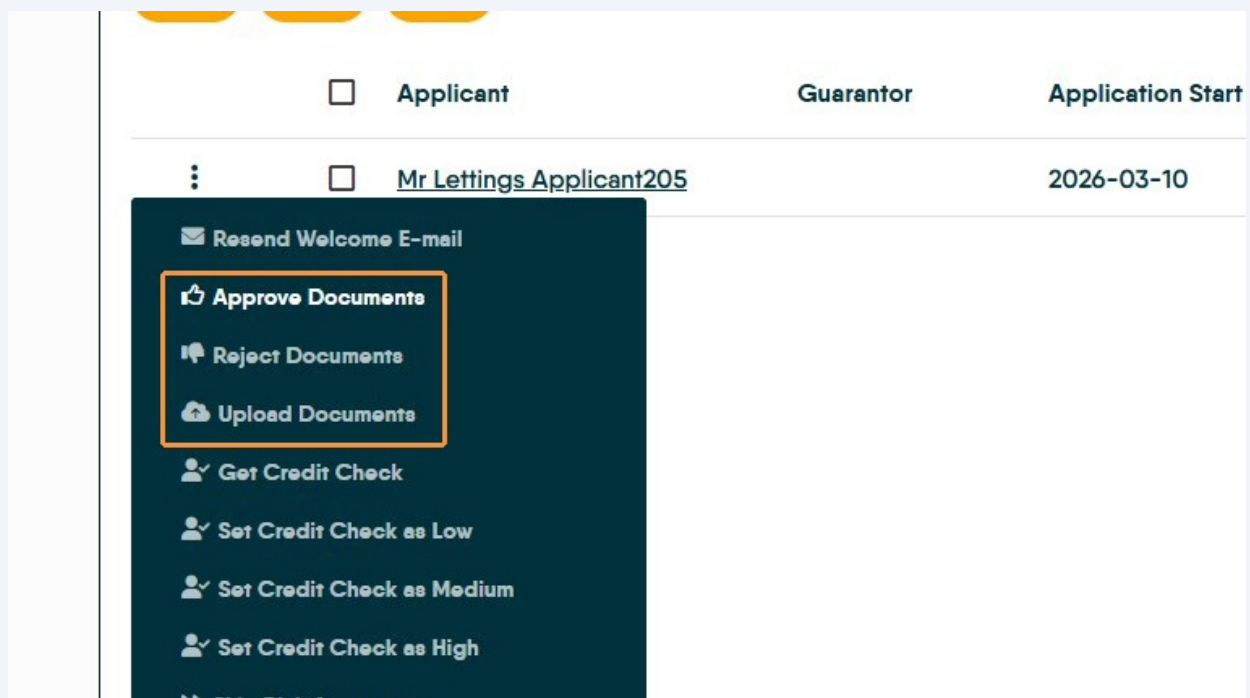
23

Once the documents and answers have been reviewed, return to the Letzone 'Tenancy Application' screen, click on the 3 dot menu.



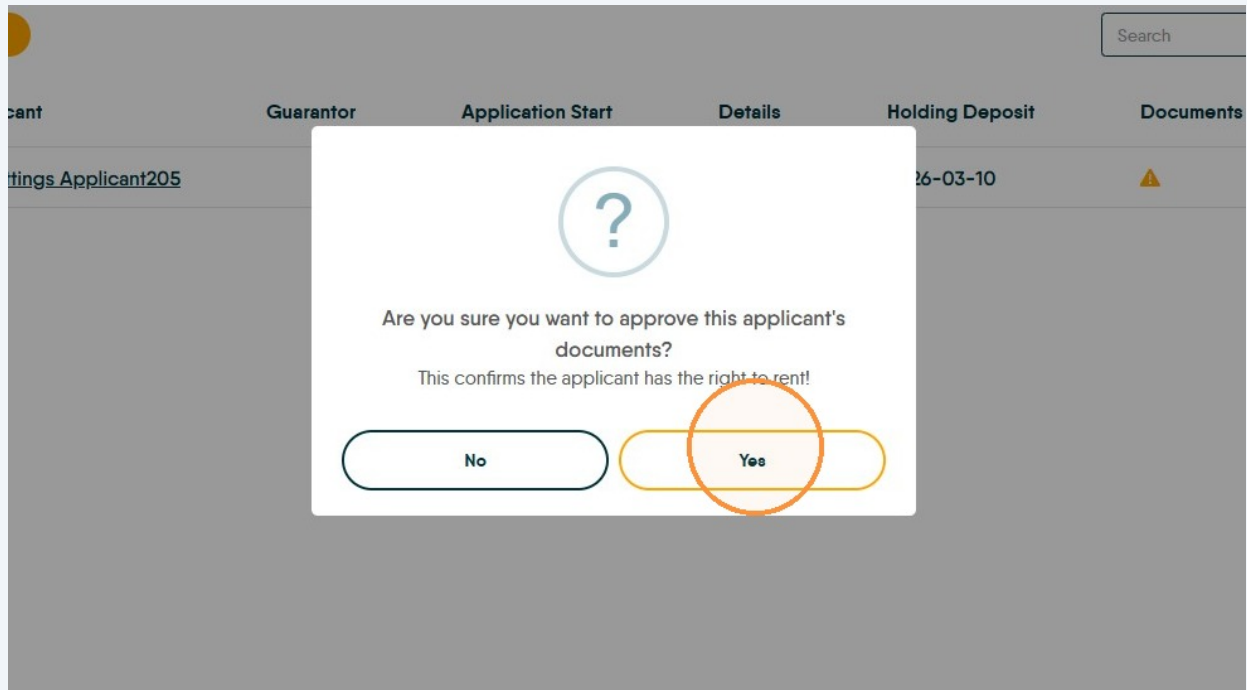
24

To approve the uploaded documents click "**Approve Documents**" or one of the other options.



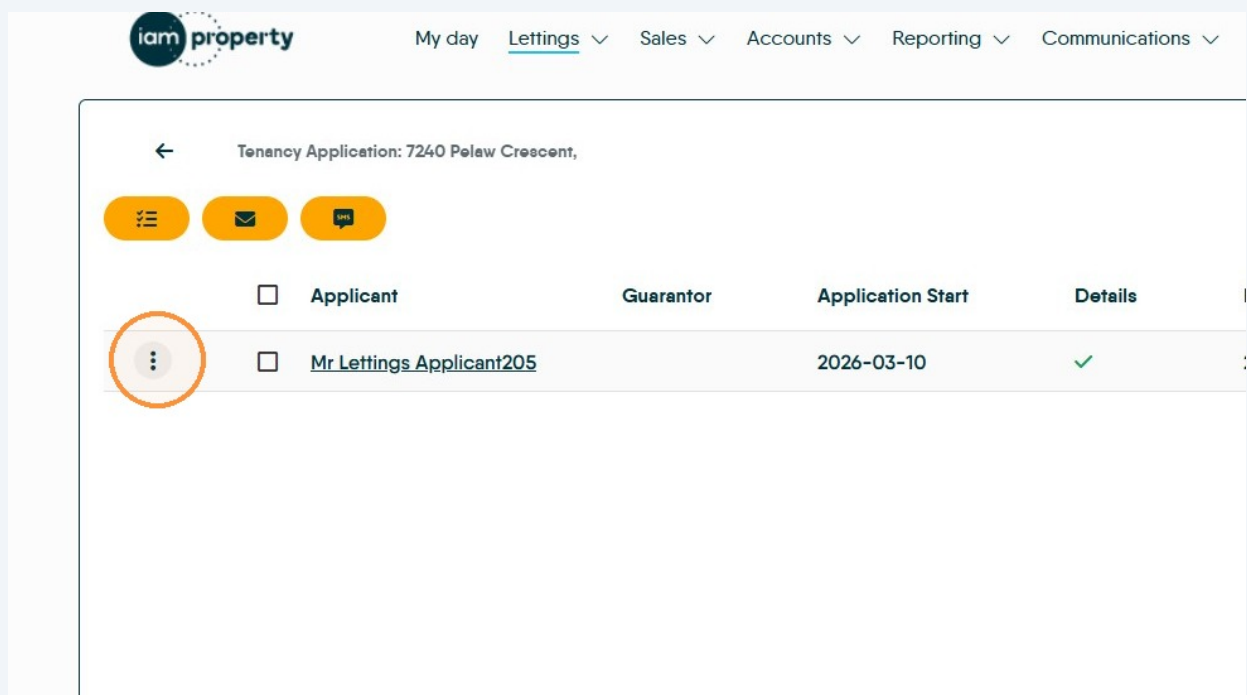
25

To approve the documents. Click **"Yes"**. This will send an email to the Tenant informing them that the documents have been accepted or declined as appropriate. The orange triangle will change to a green tick.



26

The next action you may perform is requesting credit checks or referencing checks. Click here.



27

If you do not use any of the referencing tools within CRM (Rightmove, Vision+) you can either record the score in the CRM menu, as shown below or skip Risk Assessment and Referencing using the options in the menu.

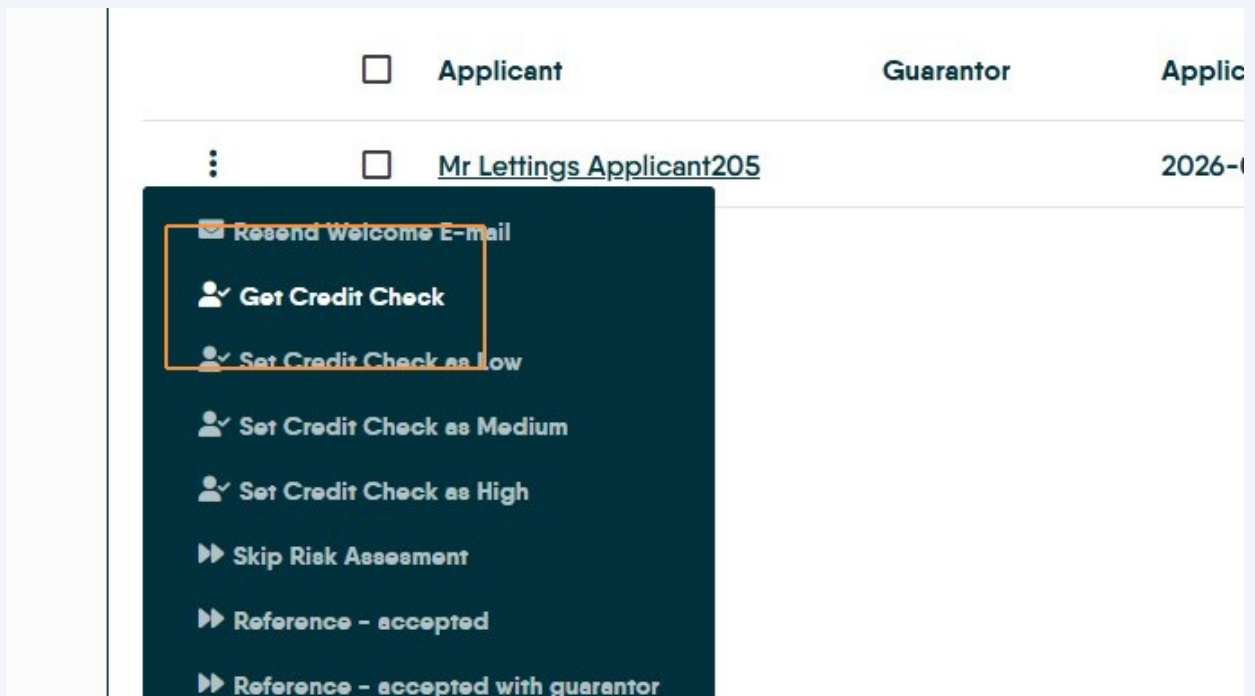
☐ Applicant	Guarantor	Application Start	Details	Holding Deposit
☐ Mr Lettings Applicant205		2026-03-10	✓	2026-03-10

- Resend Welcome E-mail
- Get Credit Check
- Set Credit Check as Low
- Set Credit Check as Medium
- Set Credit Check as High
- Skip Risk Assessment
- Request Reference
- Request Reference (Vision+)
- Skip Reference
- Reference - accepted
- Reference - accepted with guarantor
- Reference - failed
- Reference - waived
- Skip Quality Assurance

Credit Check

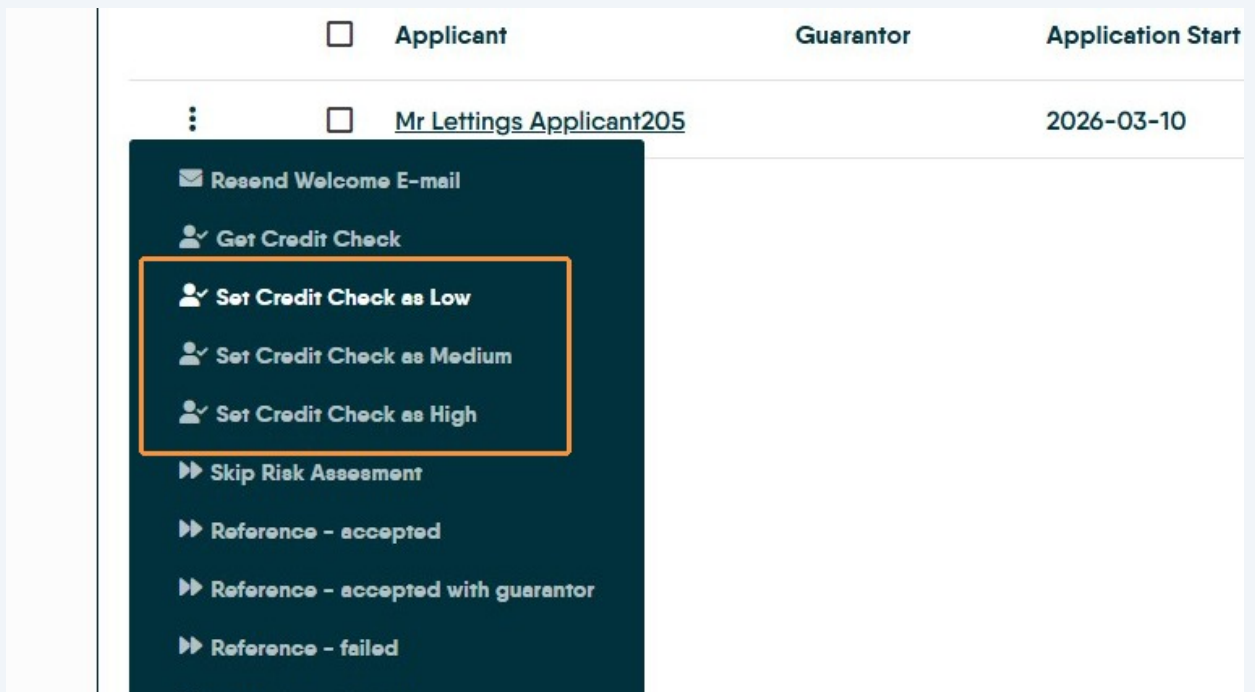
28

Click **"Get Credit Check"** This will open Rightmove referencing screen. To use Vision+ either create the referencing request from the Tenant record, or click 'Skip Risk Assessment' and the Vision+ option will show.

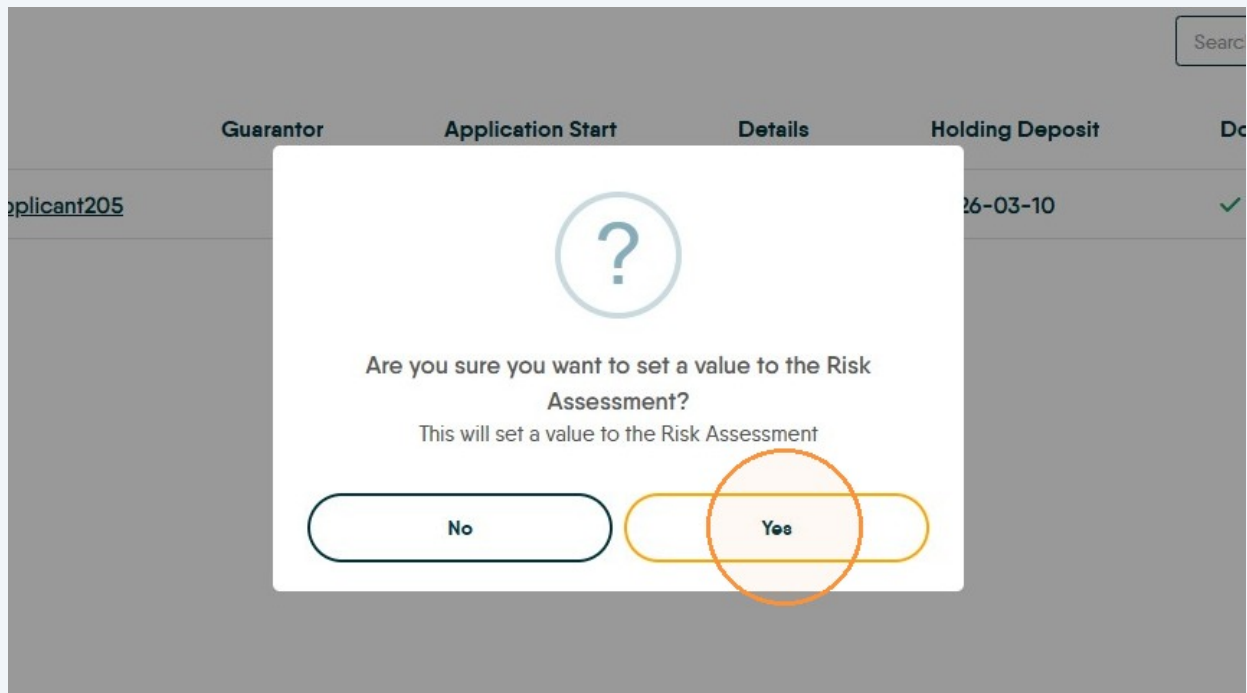


29

If you are using an external credit checking agency, set the credit check result from the drop down menu. Click "Set Credit Check as Low" or appropriate.

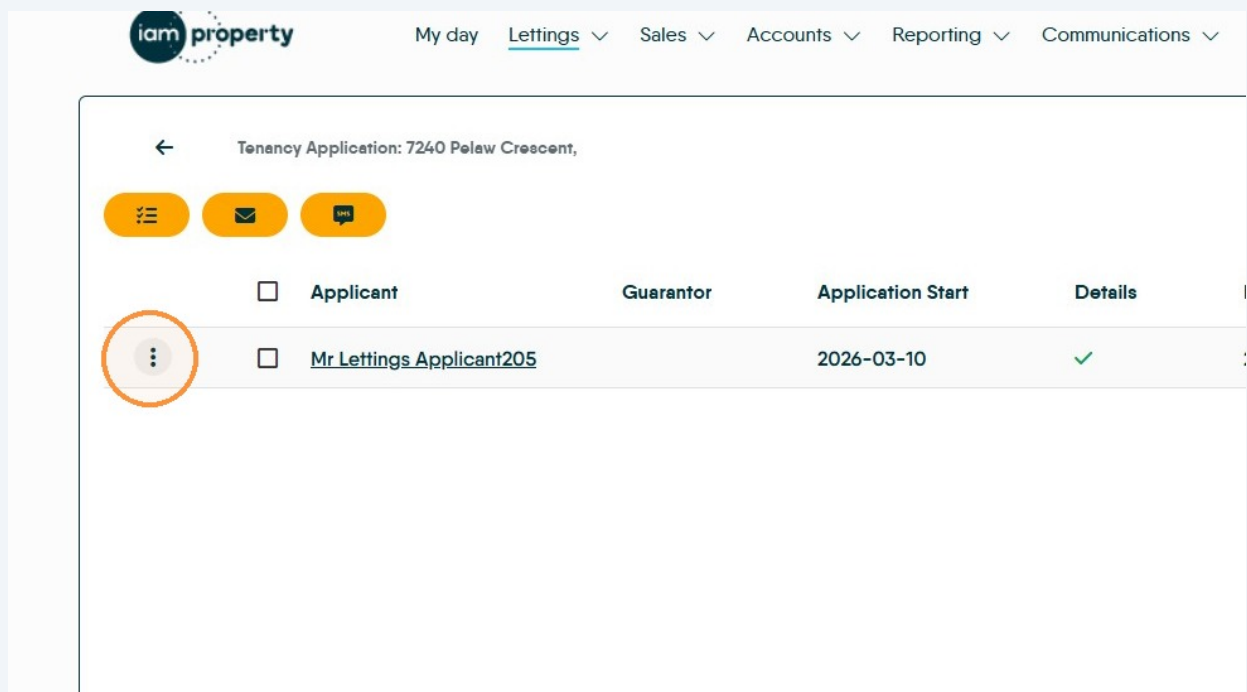


30 Click "Yes"



Referencing

31 Click here.

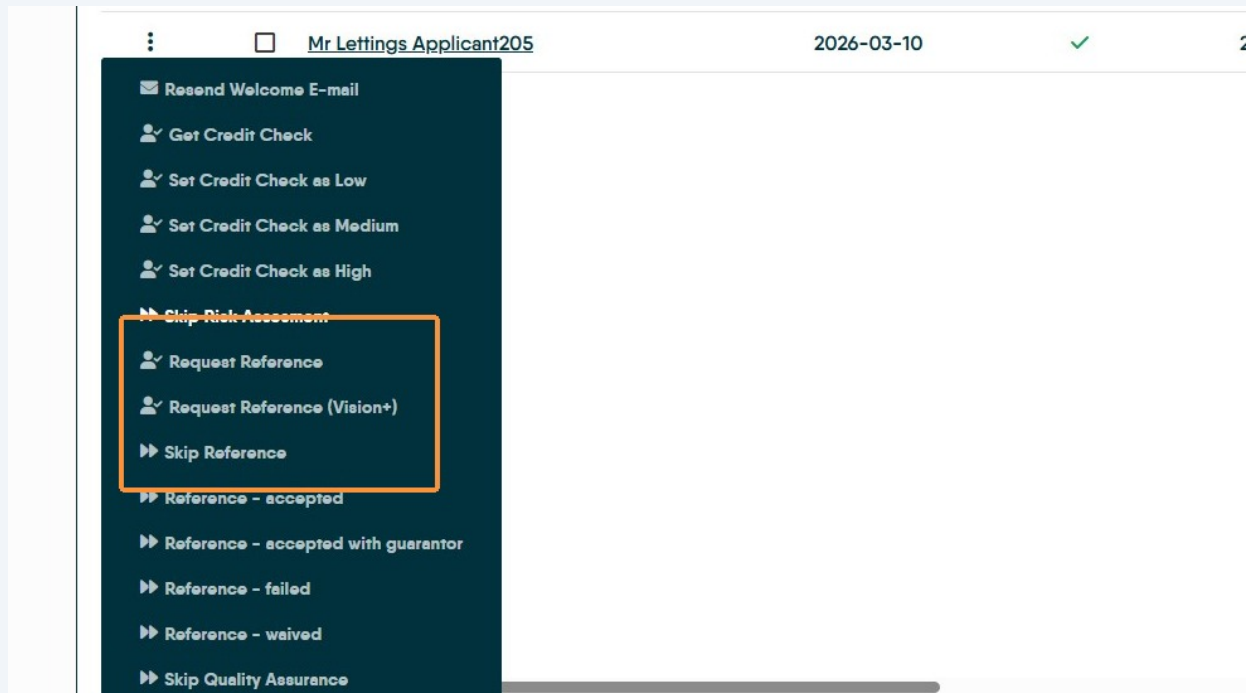


32

Click **Request Reference** for Rightmove - not required if a Credit Check has already been requested via Rightmove.

Click **Request Reference - Vision+** to use the Vision+ integration.

Click **Skip Reference** to not record a reference via Letzone.



33

If you are using an external referencing service then you can show the referencing result or 'Skip Reference'.

Quality Assurance is set in the 'Additional Information' section of the Tenant Record details screen.

☐ Applicant	Guarantor	Application Start	Details	Holding Deposit
☐ <u>Mr Lettings Applicant205</u>		2026-03-10	✓	2026-03-10

- Resend Welcome E-mail
- Get Credit Check
- Set Credit Check as Low
- Set Credit Check as Medium
- Set Credit Check as High
- Skip Risk Assessment
- Request Reference
- Request Reference (Vision+)
- Skip Reference
- Reference - accepted
- Reference - accepted with guarantor
- Reference - failed
- Reference - waived
- Skip Quality Assurance

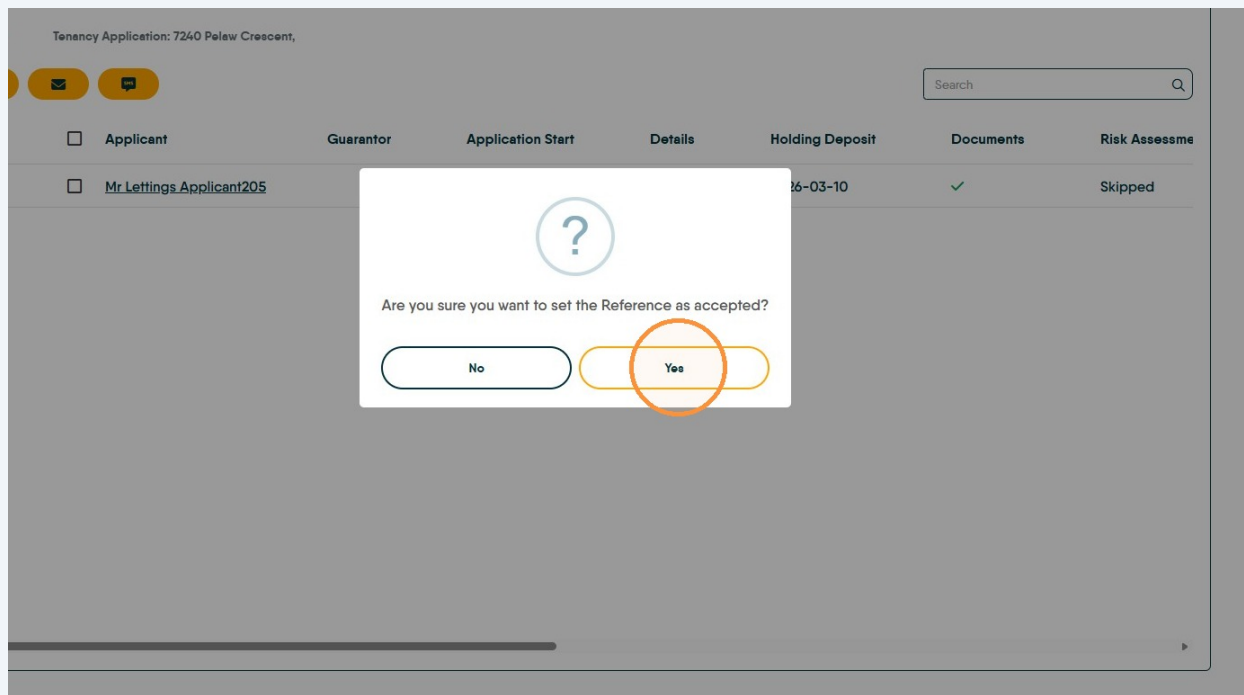
34

For example, click "**Reference - accepted**" and this will show in the tenancy row. Click "Yes"

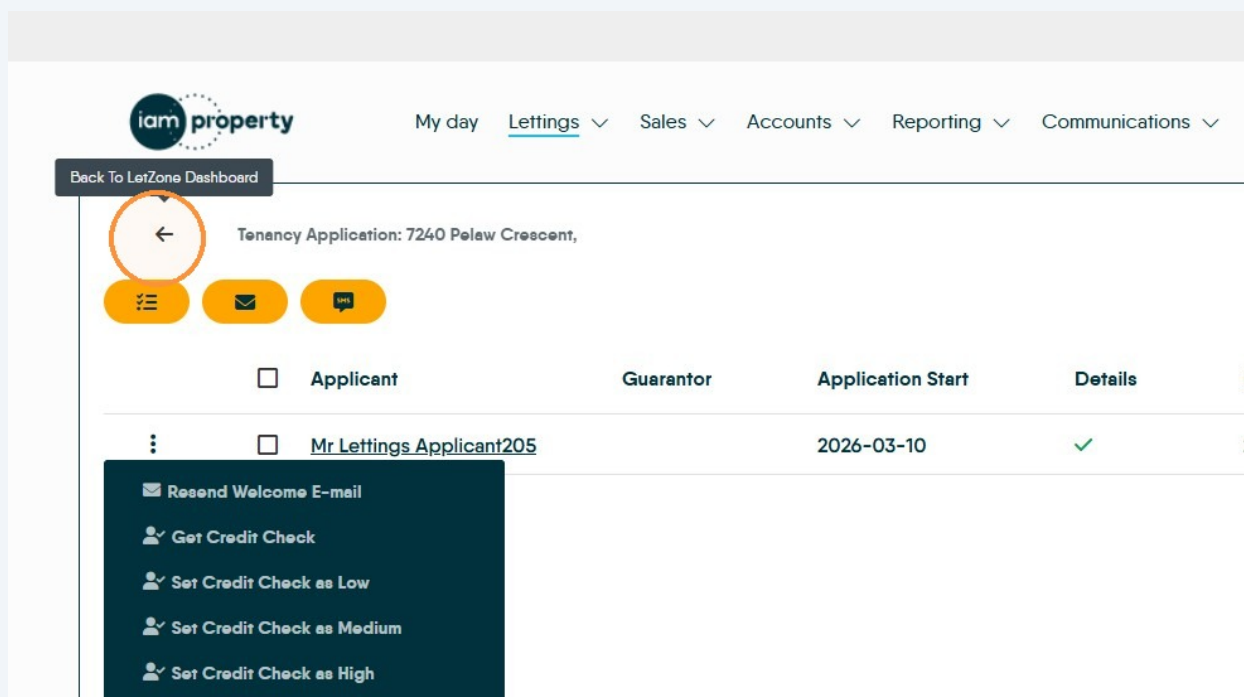
← Tenancy Application: 7240 Pelew Crescent, Search

☐ Applicant	Guarantor	Application Start	Details	Holding Deposit	Documents	Risk
☐ <u>Mr Lettings Applicant205</u>		2026-03-10	✓	2026-03-10	✓	Skip

- Resend Welcome E-mail
- Get Credit Check
- Set Credit Check as Low
- Set Credit Check as Medium
- Set Credit Check as High
- Skip Risk Assessment
- Request Reference (Vision+)
- View Vision Document
- Reference - accepted
- Reference - accepted with guarantor
- Reference - failed
- Reference - waived



35 Click here to return to the main Letzone dashboard



Creating and Sending the Tenancy Agreement

36

If you send your AST from CRM then it can be sent and the receipt of the signed document by noting '...signed' in the menu.

37

Click here.

Tenancy Applications Pre Booked Tenants					
+ Add Tenancy Application		☰ Show References List			
	Tenancy Application	Primary Tenant	Guarantor	Application Start	Del
⋮	7240 Pelaw Crescent,	Mr Lettings Appli...		2026-03-10	✓
⋮	7725 Pelaw Crescent,	tenant210		2026-03-05	✓
⋮	7725 Pelaw Crescent,	Ms Lettings Appli...		2026-03-04	✓
⋮	7665 Pelaw Crescent,	Lettings Applica...		2026-03-04	✓
⋮	712 Pelaw Crescent,	Mrs Pauline Morgan			—
⋮	Bedroom 9, 63 Woodland Ro.	Mr Lettings Appli...		2026-02-09	✓

38 Click "Create Tenancy Agreement"

Tenancy Applications

Pre Booked Tenants

+ Add Tenancy Application

Show References List

Tenancy Application	Primary Tenant	Guarantor	Application Start	Det
7240 Pelaw Crescent, Create Tenancy Agreement Tenancy Agreement Signed Terminate Tenancy Application	Mr Lettings Appli...		2026-03-10	✓
tenamt210			2026-03-05	✓
Ms Lettings Appli...			2026-03-04	✓
7665 Pelaw Crescent,	Lettings Applica...		2026-03-04	✓
712 Pelaw Crescent,	Mrs Pauline Morgan			—
Bedroom 9, 63 Woodland Ro.	Mr Lettings Appli...		2026-02-09	✓
712 Pelaw Crescent,	Lettings Applojic...			—

39 Click "Generate" Click "Tenants" Click "Generate"

AST - DPS Custodial October 2...

Generate

×

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

Generate Letter

Landlords

Tenants

☒ Lettings Landord183

Cancel

Generate

Generate Letter

Landlords

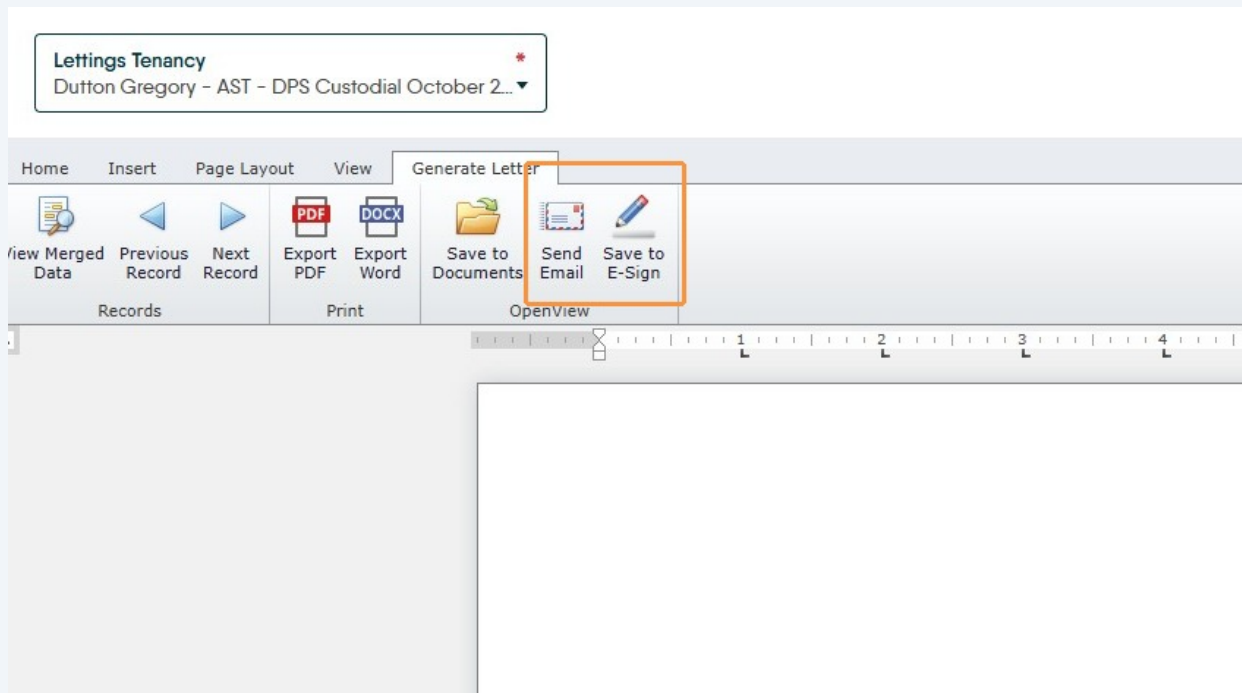
Tenants

☒ Mr Lettings Applicant205

Cancel

Generate

- 40 Click here to send either via Email or via Esign (DocuSign).



- 41 Once the Tenancy Agreement has been signed, you can note this on CRM.

Click here.

Tenancy Applications					
Pre Booked Tenants					
+ Add Tenancy Application ☰ Show References List					
Tenancy Application	Primary Tenant	Guarantor	Application Start	Det	
⋮ 7240 Pelaw Crescent,	Mr Lettings Appli...		2026-03-10	✓	
⋮ 7725 Pelaw Crescent,	tenant210		2026-03-05	✓	
⋮ 7725 Pelaw Crescent,	Ms Lettings Appli...		2026-03-04	✓	
⋮ 7665 Pelaw Crescent,	Lettings Applican...		2026-03-04	✓	
⋮ 712 Pelaw Crescent,	Mrs Pauline Morgan			—	
⋮ Bedroom 9, 63 Woodland Ro.	Mr Lettings Appli...		2026-02-09	✓	

42 Click "Tenancy Agreement Signed"

Tenancy Applications Pre Booked Tenants

+ Add Tenancy Application Show References List

Tenancy Application	Primary Tenant	Guarantor	Application Start	Det
7240 Pelaw Crescent,	Mr Lettings Appli...		2026-03-10	✓
⊕ Create Tenancy Agreement	tenamt210		2026-03-05	✓
📄 Tenancy Agreement Signed	Ms Lettings Appli...		2026-03-04	✓
✕ Terminate Tenancy Application	Lettings Applica...		2026-03-04	✓
7665 Pelaw Crescent,	Lettings Applica...		2026-03-04	✓
712 Pelaw Crescent,	Mrs Pauline Morgan			—
Bedroom 9, 63 Woodland Ro.	Mr Lettings Appli...	👤	2026-02-09	✓
712 Pelaw Crescent,	Lettings Apploijc...			—
7251 Pelaw Crescent,	Lettings Applica...			—

43 Click "Yes"

Pre Booked Tenants

Show References List Search

Primary Tenant

Mr Lettings Appli... Holding Deposit 2026-03-10

tenamt210 2026-03-10

Ms Lettings Appli... 2026-03-05

Lettings Applica... 2026-03-10

Mrs Pauline Morgan —

nd Ro. Mr Lettings Appli... 👤 2026-02-09 ✓ 2026-02-09

?

Are you sure you want to mark this tenancy as signed?
This confirm that everyone signed the tenancy agreement.

No Yes

44 This will be marked with a tick mark.

Tenancy Applications		Pre Booked Tenants		
+ Add Tenancy Application		☰ Show References List		
Quality Assurance	Referencing	Signatures	Final Payment	Welcome pack
	→		—	—
	✓	✓		
✓ Low	✓	→	—	—
	✓	✓	2026-03-05	✓
	✓	→	—	—
	✓	✓	2026-02-09	✓
	—	—	—	—
	—	—	—	—

Final Payment

45 To note that the 'Final Payment' has been received. Click here.

Tenancy Applications		Pre Booked Tenants			
+ Add Tenancy Application		☰ Show References List			
	Tenancy Application	Primary Tenant	Guarantor	Application Start	Del
⋮	7240 Pelaw Crescent,	Mr Lettings Appli...		2026-03-10	✓
⋮	7725 Pelaw Crescent,	tenamt210		2026-03-05	✓
⋮	7725 Pelaw Crescent,	Ms Lettings Appli...		2026-03-04	✓
⋮	7665 Pelaw Crescent,	Lettings Applican...		2026-03-04	✓
⋮	712 Pelaw Crescent,	Mrs Pauline Morgan			—
⋮	Bedroom 9, 63 Woodland Ro.	Mr Lettings Appli...	✓	2026-02-09	✓

46 Click "Collected Final Payment"

Tenancy Applications		Pre Booked Tenants		
+ Add Tenancy Application		☰ Show References List		
Tenancy Application	Primary Tenant	Guarantor	Application Status	
⋮ 7240 Pelaw Crescent,	Mr Lettings Appli...		2026-03-10	
£ Collected Final Payment	tenant210		2026-03-05	
✖ Terminate Tenancy Application	Ms Lettings Appli...		2026-03-04	
⋮ 7725 Pelaw Crescent,			2026-03-04	
⋮ 7665 Pelaw Crescent,	Lettings Applican...		2026-03-04	
⋮ 712 Pelaw Crescent,	Mrs Pauline Morgan			
⋮ Bedroom 9, 63 Woodland Ro	Mr Lettings Appli...	👤	2026-02-09	

47 Select the date the payment was collected from the screen

Booked Tenants

on ☰ Show Ref

Primary Tenant

Mr Lettings App

tenant210

Ms Lettings App

Lettings Applic

Mrs Pauline Morgan

land Ro: Mr Lettings Appli... 202

Lettings Appliojc...

Have you collected the final payment?
This confirms that the final payments were collected for this tenancy.

10/03/2026

No

March 2026

Sun	Mon	Tue	Wed	Thu	Fri	Sat
22	23	24	25	26	27	28
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
29	30	31	1	2	3	4

Holding Deposit

2026-03-10

2026-03-10

2026-03-05

2026-03-10

2026-02-09

48 Click "Yes"

Have you collected the final payment?
This confirms that the final payments were collected for this tenancy.

10/03/2026

No Yes

49 This will be marked with the date the payment was collected.

Tenancy Applications						
Pre Booked Tenants						
+ Add Tenancy Application Show References List						
Quality Assurance	Referencing	Signatures	Final Payment	Welcome pack	Declaration	Move In
	→	—	—	—	—	—
	✓	✓	2026-03-10			
✓ Low	✓	→	—	—	—	—
	✓	✓	2026-03-05	✓	✓	→
	✓	→	—	—	—	—
	✓	✓	2026-02-09	✓	✓	→
	—	—	—	—	—	—
	—	—	—	—	—	—
	—	—	—	—	—	—

Welcome Pack - Sending

50

You can record that the Welcome Pack has been sent. to do this click the property address e.g. "7240 Pelaw Crescent,"

10/03/2026

10/03/2026

10/03/2026

10/03/2026

Tenancy Applications

Pre Booked Tenants

+ Add Tenancy Application

Show References List

Se

	Tenancy Application	Primary Tenant	Guarantor	Application Start	Details	Holding
⋮	7240 Pelaw Crescent,	Mr Lettings Appli...		2026-03-10	✓	2026-0
⋮	7725 Pelaw Crescent,	tenant210		2026-03-05	✓	2026-0
⋮	7725 Pelaw Crescent,	Ms Lettings Appli...		2026-03-04	✓	2026-0
⋮	7665 Pelaw Crescent,	Lettings Applica...		2026-03-04	✓	2026-0
⋮	712 Pelaw Crescent,	Mrs Pauline Morgan			—	—
⋮	Bedroom 9, 63 Woodland Ro.	Mr Lettings Appli...	✓	2026-02-09	✓	2026-0
⋮	712 Pelaw Crescent,	Lettings Apploijc...			—	—

51 Click here.

The screenshot shows the 'iam property' dashboard with a navigation bar at the top containing 'My day', 'Lettings', 'Sales', 'Accounts', 'Reporting', and 'Communications'. The main content area is titled 'Tenancy Application: 7240 Pelaw Crescent,' and features three orange action buttons: a list icon, an envelope icon, and a speech bubble icon. Below these is a table with columns: 'Applicant', 'Guarantor', 'Application Start', and 'Details'. The table contains one row with the applicant 'Mr Lettings Applicant205' and a start date of '2026-03-10'. A red circle highlights a three-dot menu icon to the left of the first row.

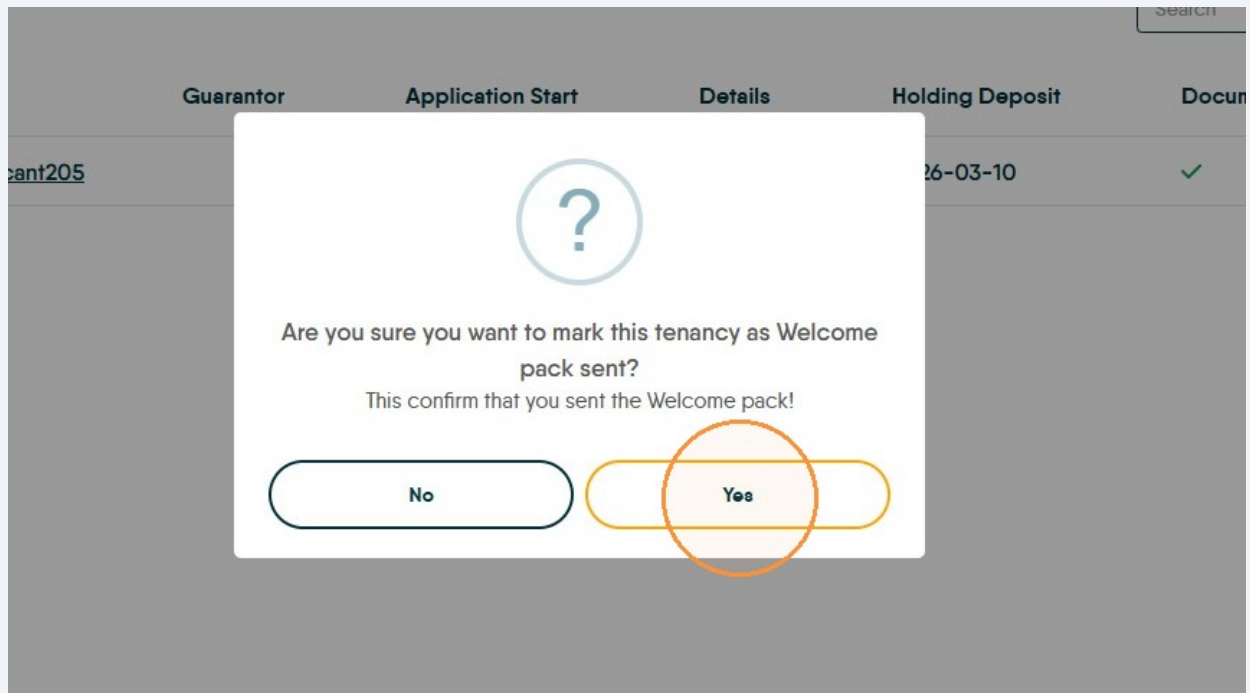
Applicant	Guarantor	Application Start	Details
Mr Lettings Applicant205		2026-03-10	✓

52 Click "Welcome pack sent"

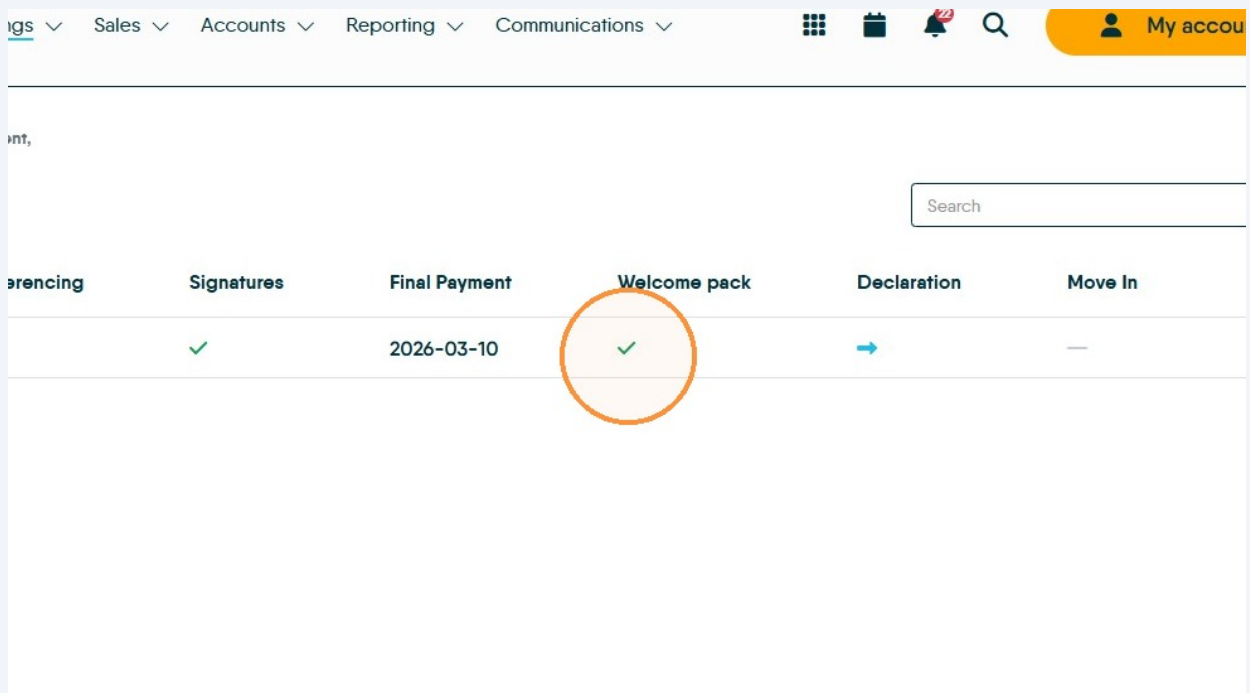
The screenshot shows a dark-themed dropdown menu with the following options: 'Resend Welcome E-mail', 'Get Credit Check', 'Set Credit Check as Low', 'Set Credit Check as Medium', 'Set Credit Check as High', 'Skip Risk Assessment', 'Request Reference (Vision+)', 'View Vision+ Documents', 'Reference - accepted', 'Reference - accepted with guarantor', 'Reference - failed', 'Reference - waived', and 'Welcome pack sent'. A red circle highlights the 'Welcome pack sent' option at the bottom of the list.

- Resend Welcome E-mail
- Get Credit Check
- Set Credit Check as Low
- Set Credit Check as Medium
- Set Credit Check as High
- Skip Risk Assessment
- Request Reference (Vision+)
- View Vision+ Documents
- Reference - accepted
- Reference - accepted with guarantor
- Reference - failed
- Reference - waived
- Welcome pack sent

- 53 Click **"Yes"** if you do not want to note this, there is an option to skip this.



- 54 There will be a tick mark in the main Letzone screen to show either the pack is sent or the option skipped.



Declaration - Create and Send

55

The Declaration allows you to send an e-signable (if available) document to your Tenant(s) to have confirmation they have received all the documents that they are required to be given at the start of a tenancy. From the main Letzone screen. Click [here](#).

Tenancy Applications

Pre Booked Tenants

+ Add Tenancy Application

☰ Show References List

	Tenancy Application	Primary Tenant	Guarantor	Application Start	Det
⋮	7240 Pelaw Crescent,	Mr Lettings Appli...		2026-03-10	✓
⋮	7725 Pelaw Crescent,	tenamt210		2026-03-05	✓
⋮	7725 Pelaw Crescent,	Ms Lettings Appli...		2026-03-04	✓
⋮	7665 Pelaw Crescent,	Lettings Applican...		2026-03-04	✓
⋮	712 Pelaw Crescent,	Mrs Pauline Morgan			—
⋮	Bedroom 9, 63 Woodland Ro.	Mr Lettings Appli...		2026-02-09	✓

56

Click **"Create Declaration"**

Tenancy Applications

Pre Booked Tenants

+

Add Tenancy Application

☰

Show References List

Tenancy Application	Primary Tenant	Guarantor	Application Start	Del
⋮ 7240 Pelaw Crescent, ▶▶ Create Declaration ✖ Terminate Tenancy Application	Mr Lettings Appli... tenamt210		2026-03-10	✓
⋮ 725 Pelaw Crescent,	Ms Lettings Appli...		2026-03-05	✓
⋮ 7665 Pelaw Crescent,	Lettings Applican...		2026-03-04	✓
⋮ 712 Pelaw Crescent,	Mrs Pauline Morgan			—
⋮ Bedroom 9, 63 Woodland Ro.	Mr Lettings Appli...	👤	2026-02-09	✓
⋮ 712 Pelaw Crescent,	Lettings Apploijc...			—

57

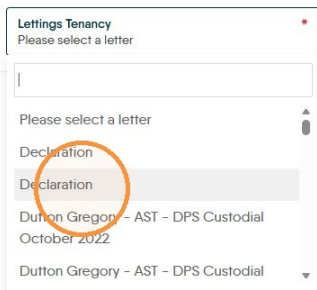
Click **"Please select a letter"**

Click **"Declaration"** or whatever your declaration letter is named.

Click **"Generate"**

Click **"Tenants"** to check the details are correct

Click **"Generate"**



Generate

×

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

Generate Letter

×

Landlords

▼

☒ Lettings Landord183

Tenants

Cancel

Generate

Generate Letter ✕

Landlords

Tenants

☒ Mr Lettings Applicant205

Cancel Generate

58 Click **"Send Email"** or **"Save to E-Sign"** to send the letter.

Lettings Tenancy Declaration

Home Insert Page Layout View **Generate Letter**

View Merged Data Previous Record Next Record Export PDF Export Word Save to Document **Send Email** **Save to E-Sign**

Records Print OpenView

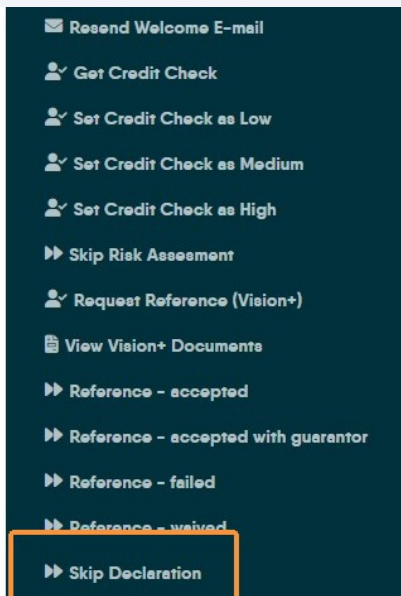
1 2 3 4 5

<<BranchName>>
<<BranchFullAddress>>
<<BranchPhone1>>
<<BranchEmail>>

DECLARATION

59

The Declaration can be skipped if required. Click the **"Skip Declaration"** option in the Tenancy Applicant list (from main screen click 'Property' > 3 dot menu next to each applicant you are skipping the declaration for) for example, you may want to do this if you have a married couple and you are only needing to note 1 person has received the documentation



60

Declaration is now marked as complete. The only option left is **'Move In'** this is completed when the Tenancy is marked as live in the Tenancy Record. At this point the Tenancy Application will be completed and the line will be removed from Letzone.

