

How to Use (Tenant) Rent Status Option



In the Financial tab of a Tenant record there is an option for Rent Status. This guide will help you learn how to manage and update your tenant rent status settings within the CRM platform. This guide helps administrators efficiently add new lookup options to ensure accurate tracking of financial and legal statuses.

Tenant Rent Status Update



Tip! This option helps you manage Rent Status information for Tenants, allowing you to show the current rent status of a Tenant for example, if the Tenant has a payment plan agreed or other information you might want to use e.g. no arrears.

N.B. By default there are no options in the drop down menu, these can be added by any user with access to configuration. To understand how to configure [click here](#)

1

Navigate to the tenant record you are adding the detail to. Scroll to and click on the '**Financial**' tab. Scroll to the '**Additional Information**' section.

Financial Details

 Account Name Stan Morgan	 Bank Backhouse	 Bank Reference Morgan Chestfields
 Account Number 73564589	 Sort Code 01-02-03	 Payment Method Bank Transfer ▼

Additional Information

Rent Status ▼

2

From the **"Rent Status"** field select the option you require e.g. "Repayment Plan - Agreed" from the Rent Status dropdown.

Financial Details

 Account Name Stan Morgan	 Bank Backhouse	 Bank Reference Morgan Chestefields
 Account Number 73564589	 Sort Code 01-02-03	 Payment Method Bank Transfer ▼

Additional Information

Rent Status ▼

Financial Details

 Account Name Stan Morgan	 Bank Backhouse	 Bank Reference Morgan Chestefields
 Account Number	 Sort Code 01-02-03	 Payment Method Bank Transfer ▼

Repayment Plan - Agreed
Repayment Plan - Not Agreed
Eviction in Process.
Rent Status

3

Click **Save** to save the changes. This will save your chosen option in the screen.

The screenshot shows a web application interface. On the left is a sidebar with a list of items, including a highlighted item with a date '17 Sep 2026' and a value '£825.00'. The main content area is titled 'Financial Details' and contains six input fields arranged in a 2x3 grid. The first row contains 'Account Name' (Stan Morgan), 'Bank' (Backhouse), and 'Bank Reference' (Morgan Chestfields). The second row contains 'Account Number' (73564589), 'Sort Code' (01-02-03), and 'Payment Method' (Bank Transfer). Below this is an 'Additional Information' section with a dropdown menu showing 'Rent Status' and 'Repayment Plan - Agreed'. At the bottom right, there is a 'Tiered Rent' label and a button labeled '+ Add New' with a 'Save Changes' button next to it. The 'Save Changes' button is highlighted with an orange circle.

Financial Details		
 Account Name Stan Morgan	 Bank Backhouse	 Bank Reference Morgan Chestfields
 Account Number 73564589	 Sort Code 01-02-03	 Payment Method Bank Transfer

Additional Information

Rent Status
Repayment Plan - Agreed

Tiered Rent

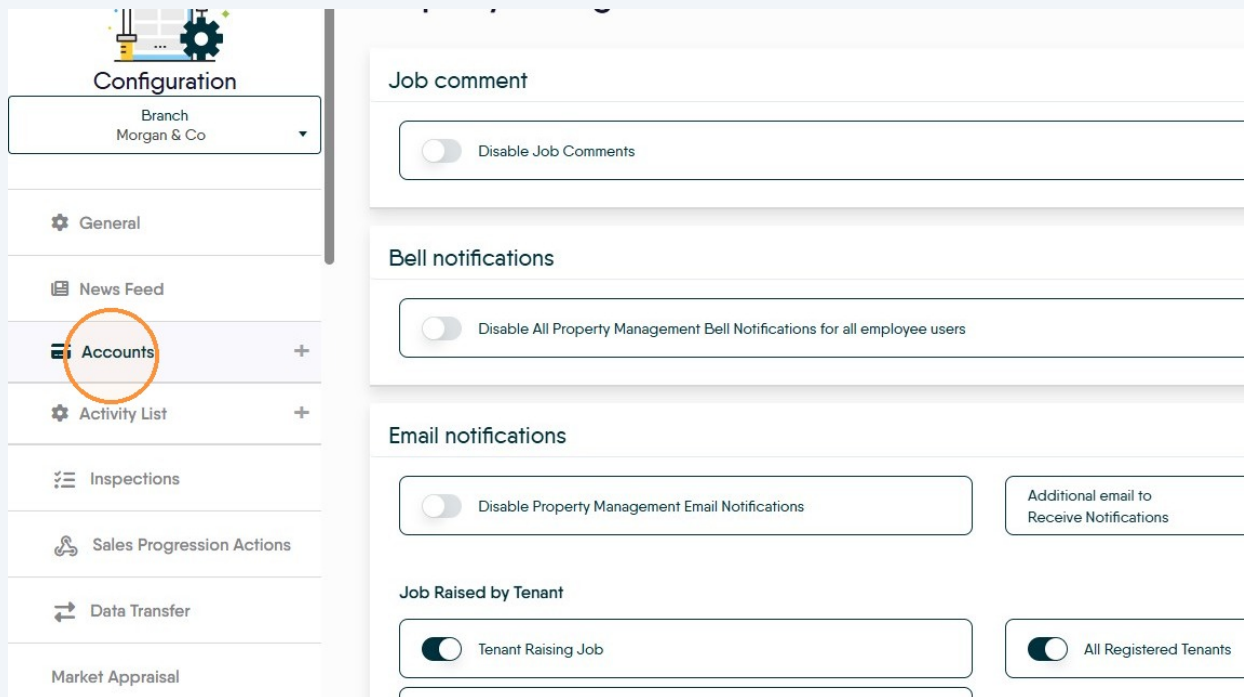
+ Add New Save Changes

Adding Items to 'Rent Status'

4

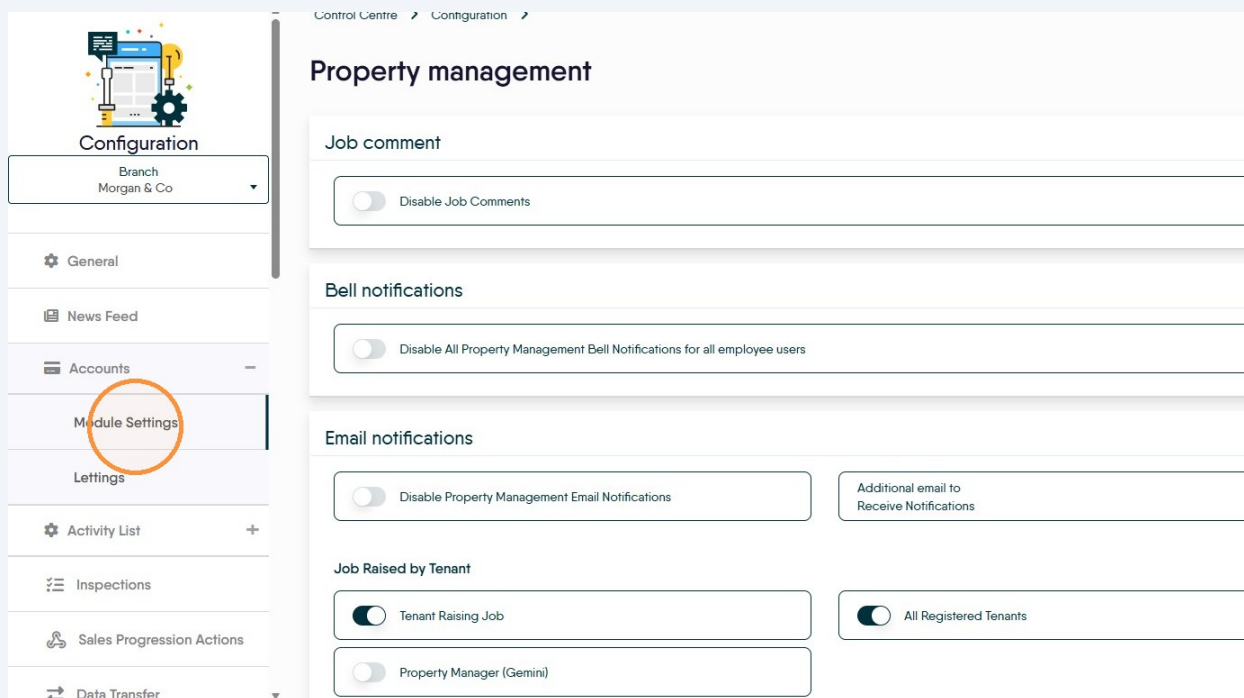
As previously noted there are no items in the **Rent Status** drop down menu, the configuration is in the Accounts module configuration. To add an option to the drop down follow the results below

5 Click "Accounts"



The screenshot shows the 'Configuration' page for 'Branch Morgan & Co'. The left sidebar contains a menu with the following items: Configuration (selected), General, News Feed, Accounts (circled in orange), Activity List, Inspections, Sales Progression Actions, Data Transfer, and Market Appraisal. The main content area displays three sections: 'Job comment' with a toggle for 'Disable Job Comments', 'Bell notifications' with a toggle for 'Disable All Property Management Bell Notifications for all employee users', and 'Email notifications' with a toggle for 'Disable Property Management Email Notifications' and a button for 'Additional email to Receive Notifications'. Below these, the 'Job Raised by Tenant' section has a toggle for 'Tenant Raising Job' and a toggle for 'All Registered Tenants'.

6 Click "Module settings"



The screenshot shows the 'Configuration' page for 'Branch Morgan & Co'. The left sidebar contains a menu with the following items: Configuration (selected), General, News Feed, Accounts, Module Settings (circled in orange), Lettings, Activity List, Inspections, Sales Progression Actions, and Data Transfer. The main content area displays three sections: 'Job comment' with a toggle for 'Disable Job Comments', 'Bell notifications' with a toggle for 'Disable All Property Management Bell Notifications for all employee users', and 'Email notifications' with a toggle for 'Disable Property Management Email Notifications' and a button for 'Additional email to Receive Notifications'. Below these, the 'Job Raised by Tenant' section has a toggle for 'Tenant Raising Job' and a toggle for 'All Registered Tenants'. At the bottom, there is a toggle for 'Property Manager (Gemin)'.

Lookup Configuration

7 In "Lookup Settings" click into "Select a Lookup to Edit"

Configuration

Branch
Morgan & Co

Settings

Lookup settings

SELECT A LOOKUP TO EDIT
Select a lookup

Accounts grid options

Grid Row Height
Medium

Modal/Popup Grid Row Height
Small

8 Click "Tenant Rent Status"

Configuration

Branch
Morgan & Co

General

News Feed

Accounts

Module Settings

Lettings

Activity List

Inspections

Sales Progression Actions

Data Transfer

Lookup settings

SELECT A LOOKUP TO EDIT
Select a lookup

Transaction Sub Types

Banks

Expense Category

Payment Method

Tenant Rent Status

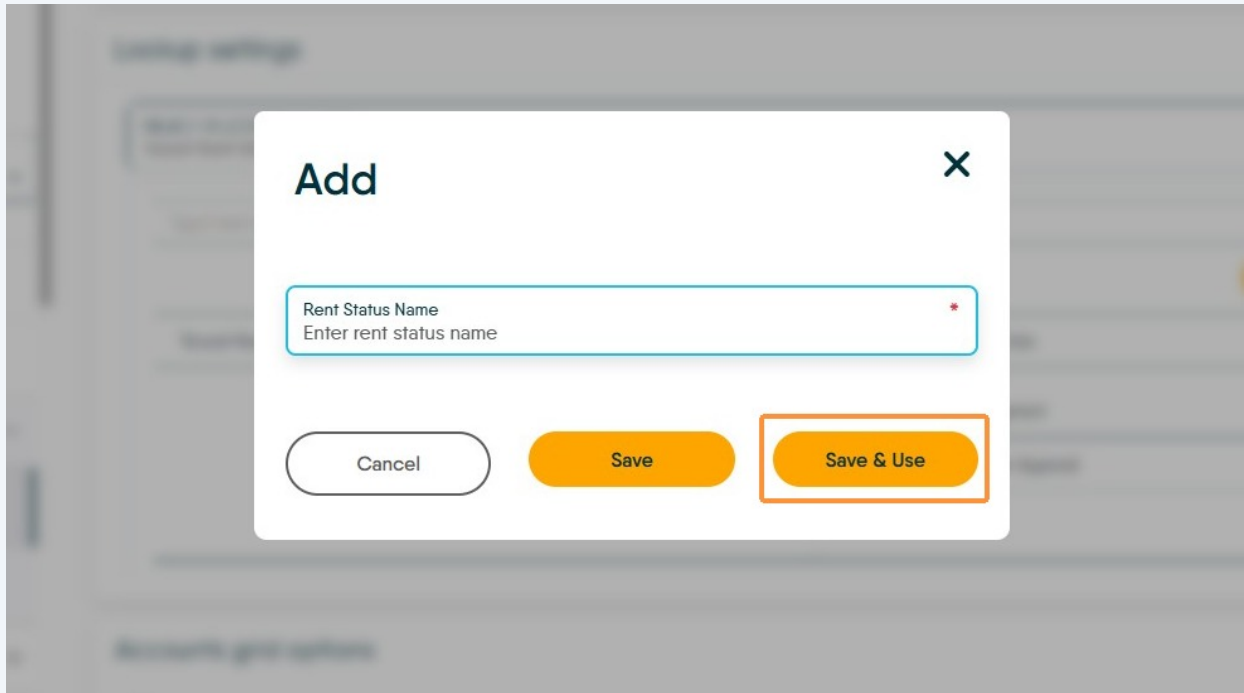
9 Click "Add New"

The screenshot shows the 'Rent guarantee' settings page. At the top, there is a toggle for 'Show all properties on perform payments'. Below this, the 'Rent guarantee' section has a 'Save' button and a 'Use Rent Guarantee' toggle. A blue information bar states: 'This setting will be applied across all of your branches in your company'. The 'Lookup settings' section below has a dropdown for 'SELECT A LOOKUP TO EDIT' (currently showing 'Tenant Rent Status') and a search bar. The 'Add New' button is highlighted with an orange box. Below the search bar, there are two columns: 'Tenant Rent Status Available' and 'Tenant Rent Status In Use'. The 'In Use' column contains three items: 'Repayment Plan - Agreed', 'Repayment Plan - Not Agreed', and 'Eviction in Process', each with edit, delete, and status icons.

10 Click the "Rent Status Name" field and enter the name for the status you wish to create.

The screenshot shows a modal dialog box titled 'Add' with a close button (X) in the top right corner. Inside the dialog, there is a text input field labeled 'Rent Status Name' with a placeholder 'Enter rent status name' and a red asterisk indicating it is required. The field is highlighted with an orange box. At the bottom of the dialog, there are three buttons: 'Cancel', 'Save', and 'Save & Use'.

11 Click **"Save & Use"**



The screenshot shows a modal dialog box titled "Add" with a close button (X) in the top right corner. Inside the dialog, there is a text input field with the placeholder text "Rent Status Name" and "Enter rent status name". Below the input field, there are three buttons: "Cancel", "Save", and "Save & Use". The "Save & Use" button is highlighted with an orange border, indicating it is the target for the next step.

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The options you have set will show in the '**Tenant Rent Status In Use**' field. These options will be available in the 'Rent Status' area of the 'Financial' tab in a Tenant record.

Any status options you have created and not enabled will show in the 'Tenant Rent Status Available' field.

The screenshot shows the 'Lookup settings' configuration page for 'Tenant Rent Status'. The interface includes a sidebar on the left with navigation options like 'uration', 'ich & Co', 'ttings', 's', 'ression Actions', and 'fer'. The main content area is titled 'Lookup settings' and contains two sections: 'Tenant Rent Status' and 'Accounts grid options'.

Tenant Rent Status Section:

- A dropdown menu labeled 'SELECT A LOOKUP TO EDIT' with 'Tenant Rent Status' selected.
- A search bar with the placeholder text 'Type here to search for a lookup option...' and a magnifying glass icon.
- An orange '+ Add New' button.
- A table with two columns: 'Tenant Rent Status Available' and 'Tenant Rent Status In Use'.

Tenant Rent Status Available	+ Use all	Tenant Rent Status In Use	✕ Remove all
		Repayment Plan - Agreed	
		Repayment Plan - Not Agreed	
		Eviction in Process.	

Accounts grid options Section:

- A 'Save' button.
- Two dropdown menus for grid options:

Grid Row Height	Medium
Modal/Popup Grid Row Height	Small