

Completing the Lettings Property Information Screen



This guide show the steps to complete the "Information" screen in the CRM Lettings Property record.



Tip! All the details entered into this screen, with the exception of the Mortgage information, will be visible to your tenants if you give them access to the CRM Tenant Portal.

Information Screen

- 1 In the left side menu of a Lettings Property record, click **"Information"**

The screenshot shows the 'Information' screen in the CRM Lettings Property record. The left sidebar contains a menu with items: Live Jobs, EPC Rating, Details, Checklist, Appraisals, Inspections, Accounts, Compliance, Information (circled in orange), maintenance, Payment, Marketing, and Key Control. The main content area is divided into two sections: 'COMMERCIAL' and 'OTHER'. The 'COMMERCIAL' section includes a 'Commercial Unit' toggle, three VAT options (Exempt, Inclusive, Exclusive), and a 'Scheduled Management Fee' section. The 'OTHER' section includes 'Alarmed', 'Requires HMO Licence', 'Use Rent Guarantee', and 'Landlord Insurance' toggles, along with input fields for 'Entry Code', 'HMO Expiry Date', and 'Landlord Insurance Renewal Date'.

Update Meter Details

- 2 Here we can log the serial numbers of all the meters in the property, click into the box and type the number.

83891 Pelaw Crescent, Chester le Street, DH2 2HX |
 3 1 | £ 0.00 null

Lead landlord: Mr & Mrs Sales Vend... View Landlords

Lead tenant: View Tenants

Reference: 10850866 Negotiator: Training Dave Branch: Morgan & Co Status: Live

Meters

Notes

Electric meter	Gas meter	Water meter	Oil meter
Serial Number	Serial Number	Serial Number	Serial Number

Information Mortgage

83891 Pelaw Crescent, Chester le Street, DH2 2HX |
 3 1 | £ 0.00 null

Lead landlord: Mr & Mrs Sales Vend... View Landlords

Lead tenant: View Tenants

Reference: 10850866 Negotiator: Training Dave Branch: Morgan & Co Status: Live

Meters

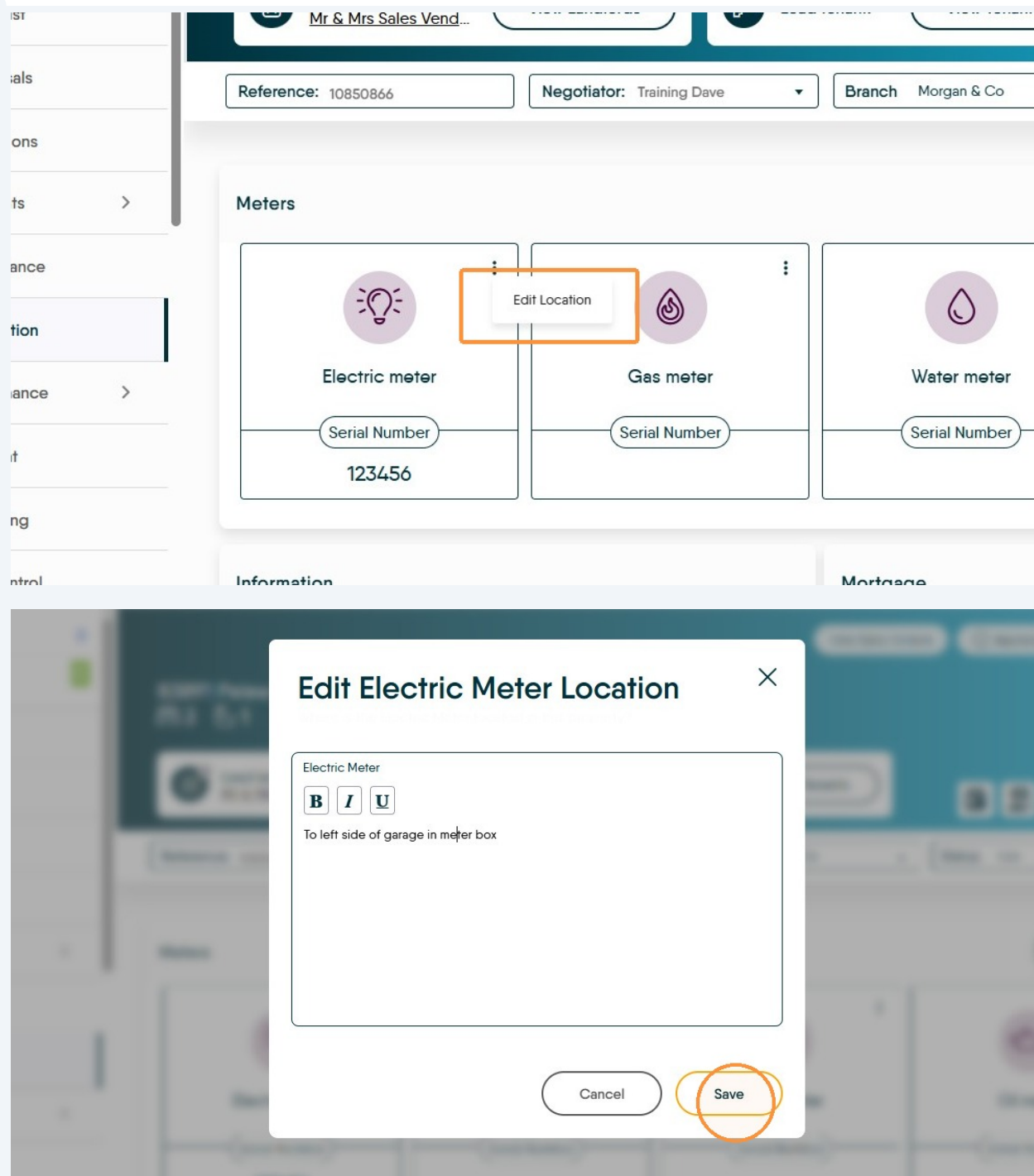
Notes

Electric meter	Gas meter	Water meter	Oil meter
Serial Number 123456	Serial Number	Serial Number	Serial Number

Information Mortgage

3

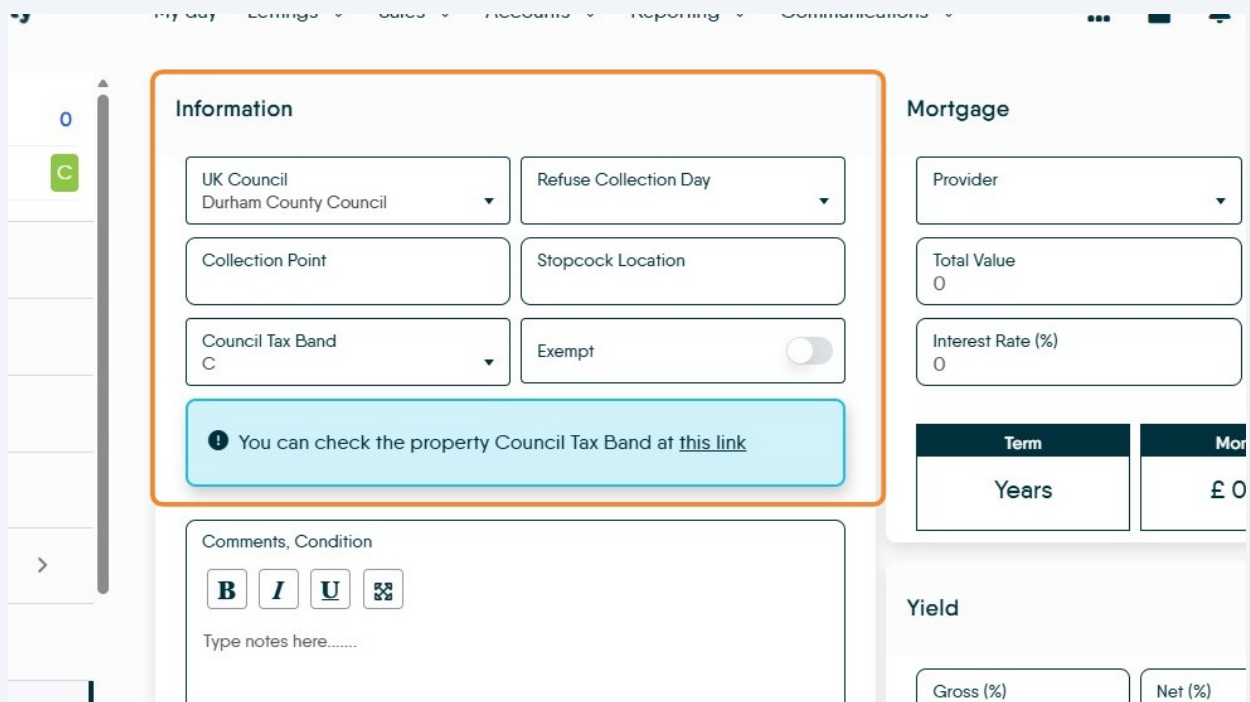
And also note the location for the meters. Click the 3 dots to Edit Location for the electric meter.
 Type the location of the meter into the field and click **"Save"**



Update Property Information

4

In the **"Information"** section the council and council tax band can be stored as can useful information such as the refuse collection day and where the bins are collected from and where the stopcock is located.



Information

UK Council
Durham County Council

Refuse Collection Day

Collection Point

Stopcock Location

Council Tax Band
C

Exempt ☐

! You can check the property Council Tax Band at [this link](#)

Comments, Condition

B **I** **U**

Type notes here.....

Mortgage

Provider

Total Value
0

Interest Rate (%)
0

Term	Mor
Years	£ 0

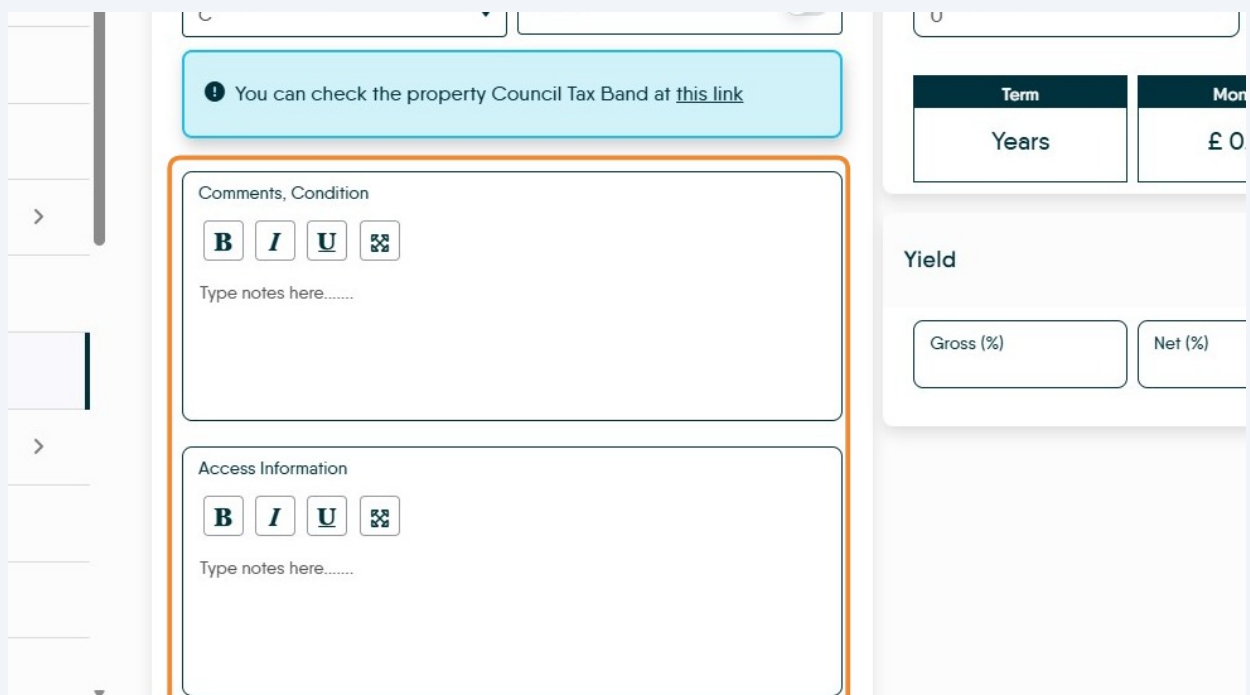
Yield

Gross (%)

Net (%)

5

Click the **Comments, Condition** and **Access information** notes field to add any relevant comments you have.



! You can check the property Council Tax Band at [this link](#)

Comments, Condition

B **I** **U**

Type notes here.....

Access Information

B **I** **U**

Type notes here.....

Mortgage

Provider

Total Value
0

Interest Rate (%)
0

Term	Mor
Years	£ 0

Yield

Gross (%)

Net (%)



Alert! Remember anything you put into these fields, is fully visible to your Tenants if they have access to the Tenant Portal.

6 Click **Save** to save all your updates.

Information

UK Council
Durham County Council

Refuse Collection Day

Collection Point

Stopcock Location

Council Tax Band
C

Exempt

You can check the property Council Tax Band at [this link](#)

Comments, Condition

B **I** **U** [Grid Icon]

Type notes here.....

Access Information

B **I** **U** [Grid Icon]

Type notes here.....

Mortgage

Provider

Term

Total Value
0

Deposit
0

Interest Rate (%)
0

End Date
Invalid date

Term	Monthly	Total
Years	£ 0.00	£ 0.00

Yield

Calculate

Gross (%)

Net (%)

ROI (%)

Save Change [Lock Icon]

7 The Mortgage screen is an information only screen and is not shared anywhere other than on this screen.