

LetMC.com[®]
lettings software

Importing tenancies from PropertyAdd

Properties can be imported to LetMC from PropertyAdd at several stages, including prior to instruction, at instruction so that contracts can be prepared once let.

In order to import a property, first create the landlord contact record and property record, then:

- For pre-instruction properties, add a pending or accepted 'Valuation' transaction to the property
- For instructed properties, add an accepted 'Instruction' transaction
- For tenant applications, add an accepted 'Offer' transaction

E.g.

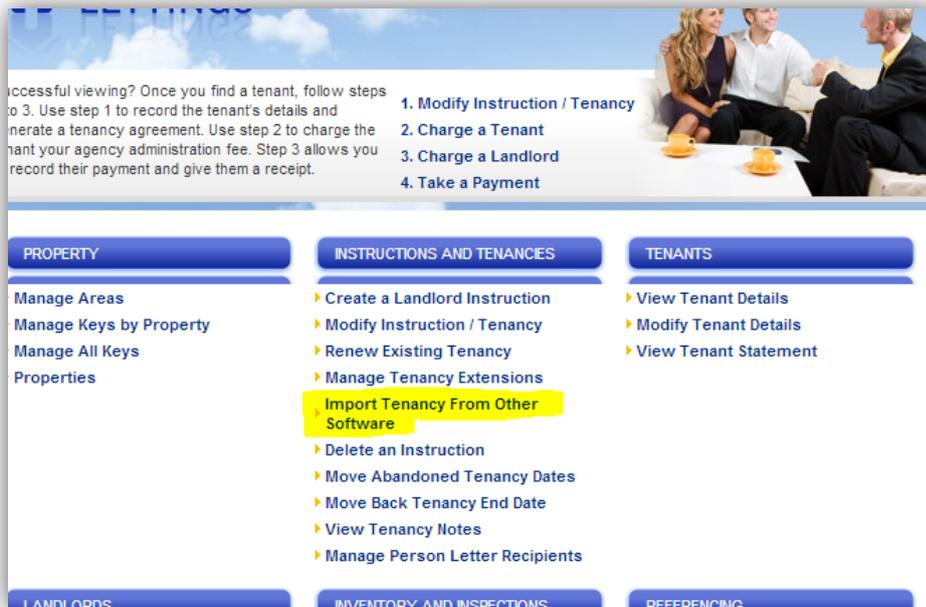
Date	Transaction	Contact	Value	Status
 11/10/2012	Valuation	Jasprit Kahai	£1,400.00	 Pending
Add new transaction				

Once the transaction record has been added, use the 'Import Tenancy From Other Software' option in LetMC to 'transfer' the information.

Note: you can import a property after each stage in order to update LetMC with the latest information. If you are importing a property for a second time, you will need to remove the let agreed instruction on LetMC before reimporting.

It is also important to remember that contact information in PropertyAdd should always be updated first and then re-imported into LetMC as there is no option to do transfer information back from LetMC to PropertyAdd automatically.

To begin this process, go to [lettings > instructions and tenancies > import tenancy from other software](#). This is the link between PropertyAdd and LetMC.



You'll be presented with a screen that lists all properties that are set up and ready to import from PropertyAdd. If no properties appear in this section, it is worth going back to property add to check all information is set up correctly and the appropriate transaction record has been added.



To select a particular property and import it onto LetMC, press the 'go' button for the relevant property on the right hand side of the screen. You will then be taken onto a screen where you can view the specific property information.

The top left hand side of the property information shows whether LetMC identifies the property and landlord information as new or existing.

For example if this is a newly won landlord and property that has only been entered onto PropertyAdd recently, there will be no record on LetMC so they will be created as a new landlord and property.

If the property is already let and managed on LetMC and you have re-advertised on PropertyAdd, LetMC will identify this and link the new proposed tenancy to the existing record.

If any information required by LetMC is missing, it will be listed under 'missing details'. Click the 'edit' button to be taken to a screen where the details can be entered.

The screenshot shows two sections of the LetMC interface. The first section, '1. THE PROPERTY', has a '1.' icon and a play button. It contains two radio button options: 'Import As New Property' (selected) and 'Use Existing Property'. Under 'Import As New Property', there is a 'Bridge Property' field with the value '123 High Street' and a 'Missing Details: 0' field with an 'edit' button. Under 'Use Existing Property', there is a 'Will Link To:' field with the text 'Please Select an Existing Property' and a 'select' button. The second section, '2. THE LANDLORD', has a '2.' icon and a play button. It also has two radio button options: 'Import As New Landlord' (selected) and 'Use Existing Landlord'. Under 'Import As New Landlord', there is a 'Bridge Landlord' field with the value '22 Example Street' and a 'Missing Details: 0' field with an 'edit' button. Under 'Use Existing Landlord', there is a 'Will Link To:' field with the text 'Please Select an Existing Property' and a 'select' button.

At the bottom of the screen you will see five tabs where some information is imported from PropertyAdd and other information can be added. Please note, only the 'tenancy details' and 'tenants' tabs are required to have information added in order to import the tenancy onto LetMC. You can add information to the other tabs at this point, however this document will show you the process of how to add the additional information onto LetMC after the essential information has been imported.



The 'tenancy details' tab is shown below. The information you will need to check and amend if needed is:

- Start Date: the start date of the tenancy.
- Fixed Date: the fixed date of the tenancy.
- End Date: if this is a fixed term tenancy, the end date needs to be set.
- Check the bond deposit and total rent amount appear correct.
- Set the 'rent date' to the second day the rent should become due on this tenancy. For example, if the tenancy was signed on the 4th of November, the rent date should be marked as the 4th of December.
- At the bottom of the 'tenancy details' page, select the 'service' that the tenancy is under. E.g. 'managed' or 'let only'.
- On the 'tenants' tab, click the 'edit' button for each tenant listed and make sure the right rent is inputted against that tenant. If the tenants will be paying in bulk, mark one tenant with all the rent against their name. If they are going to be paying the rent split, split the rent amounts between their records.

3. THE TENANCY

PROBLEMS NEEDING FIXING

* Please select a service type.

Tenancy Details Special Conditions Tenants Inventory Items Closing Inspection Items

TENANCY - PROPOSED TENANCY AT 22 EXAMPLE STREET, AA1 1AA

Is Room In Property: Rent Date: -- Not Set --

Is Student Property: Opening Inventory -- Not Set --

Start Date: 27 November 2012 Opening Inventory Carried Out:

Fixed Date: 26 May 2013 Opening Inventory Signed By Tenant:

End Date: 26 May 2013 Closing Inspection Date: -- Not Set --

Closed Date: -- Not Set -- Closing Inspection Signed By Tenant:

Bond Required: 1,800.00 * Rent Date Type: Next Collection Date

Total Rent: 1,650.00 * Rent Schedule: Monthly

Minimum Beds: Furnished: Unfurnished

Maximum Beds: 3 * Gas Payee: Tenant

Inspection Recurrence: Electricity Payee: Tenant

Inspection Schedule: None

Water Payee: Tenant

Once these details have been added, click the 'next' button in the navigation bar on the left hand side of the screen. You'll then be presented with a 'confirm import screen'. LetMC will highlight any information still required at this point. If none is required you can click the 'finish button' to import the tenancy onto LetMC.

Once imported from PropertyAdd. Four areas will need to be checked to ensure that LetMC has enough information to for property management and accounting. These are:

- Checking the property
- Checking the landlord
- Checking the 'instruction'
- Checking the let agreed information

Checking the property

This can be completed in lettings > property > properties > modify a property. Once you have selected 'modify a property' you'll be presented with a search option screen. Search for the first line

of the address (without the number) of the property that you have just imported from PropertyAdd and then click search.

1 SELECT A PROPERTY 2 PROPERTY DETAILS 3 ROOMS & PHOTOS 4 UTILITIES 5 CONFIDENTIAL NOTES 6 FACILITIES

SEARCH CRITERIA

Street: Branch / Area: -- All Counties --

-- All Branches --

Select a Branch

 Key Bunch: Reference:

PROPERTY SEARCH RESULTS

Property	Area / Branch
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Click 'next' on the right hand side of the screen to navigate through the different pages of the property record. The two areas that will be important to check will be section 2 – 'Property Details' and section 4 – 'Utilities'.

In section 2 make sure that the correct address details have been transferred from PropertyADD and input any other additional information you require.

In section 4 make sure you have the correct utility supplies selected along with adding their locations and meter serial numbers. The amount of supplies you have selected here will affect how many

opening and closing meter readings you can enter when a tenancy starts and ends. Then click next until you have gone through the rest of the pages and then click 'finish'.

Checking the landlord

This can be completed in lettings > landlords > modify landlord details. Once you have selected 'modify landlord details' you'll be presented with a search option screen. Search for the surname of the landlord that you have just imported from PropertyAdd and then click search.

The screenshot shows a navigation bar at the top with seven numbered tabs: 1. SELECT A LANDLORD, 2. LANDLORD DETAILS, 3. CONTACTS LIST, 4. BANK DETAILS, 5. LANDLORD PROPERTIES, 6. MANAGEMENT FEES, and 7. REFERENCES. Below the navigation bar is the 'SEARCH CRITERIA' section, which includes input fields for 'Forename:', 'Surname:', and a 'Branch:' dropdown menu set to '-- All Branches --'. A 'search' button is located to the right of the 'Surname' field. Below the search section is a 'RECENT PEOPLE' section with a table header containing 'Name' and 'Branch'.

Click 'next' on the right hand side of the screen to navigate through the different pages of the landlord record. The areas that will be important to check will be section 2 – 'landlord details' where you can check the name of the landlord imported from PropertyAdd, section 3 – 'contacts list' where you check the correspondence address is correct and section 4 – 'bank details' where you can ensure that bank details have been entered.

The screenshot shows the same navigation bar as the previous image, but with tab 4, 'BANK DETAILS', highlighted. Below the navigation bar are two sections: 'ACCOUNT DETAILS' and 'BANK DETAILS'. The 'ACCOUNT DETAILS' section contains three input fields: 'Account Name' (with 'Account Number' pre-filled), 'Account Number' (with '00000000' pre-filled), and 'Sort Code' (with '000000' pre-filled). Each field has an information icon (i) to its right. The 'BANK DETAILS' section contains five input fields: 'Bank Name', 'Address Line 1', 'Address Line 2', 'Address Line 3', and 'Address Line 4', followed by 'Postcode'. Each field also has an information icon (i) to its right.

Checking the 'instruction'

The 'instruction' information is where the majority of the advertising information will be held on LetMC. As you are advertising on PropertyAdd, much of the information will not be applicable. However some screens on the instruction will have an effect on property management and account and so it is still important to check these areas.

Go to lettings > instructions and tenancies > modify instruction / tenancy. Search for the property (or select it in the recent properties list). Then click 'ok'. Once in this area then select the 'modify landlord instruction' option.

1 CREATE INSTRUCTION 2 ADVERTISED INSTRUCTION 3 LET AGREED TENANCY 4 SIGNED TENANCY 5 ENDED TENANCY 6 CLOSED TENANCY

Property : Let Agreed Tenancy(Re-let) on 47 Ravenswood Common, AA1 1AA

- ▶ [Step 1. Set Tenancy Start, Fixed and End Dates](#)
Use this option to set the various dates on the tenancy.
- ▶ [Step 2. Add or Remove Tenants and Choose Tenancy Agreement Type](#)
Use this option to modify the tenants' details including their contact details, bank details and the percentage of rent that each individual is responsible for. It's also possible to make a deposit due early and select the type of tenancy agreement to be used.
- ▶ [Step 3. Tenant Referencing](#)
Use this option to reference check tenants on this tenancy.
- ▶ [Step 4. Payment Schedule](#)
Use this option to specify the amount and frequency of rent due.
- ▶ [Step 5. Print or Post Tenancy Agreement](#)
Use this option to print or post the Tenancy Agreement to the tenant or landlord.
- ▶ [Step 6. Sign Tenancy](#)
Use this option once the tenants have signed the Tenancy Agreement.
- ▶ [Modify Landlord Instruction](#)
Use this option to view / modify the landlord's criteria and special conditions for a tenancy, the Company's Tenancy Service and charges to the landlord.
- ▶ [Cancel Tenancy](#)
Use this option to cancel the tenancy and change the stage back to instructed.
- ▶ [Upload Signed Tenancy Agreement Documents](#)
Store a signed copy of the tenancy agreement.

The main features to check in the 'landlord instruction' area is 'special conditions' on the third page; here you can add a condition which will appear in your tenancy agreement.

The other feature to check will be the interim inspection frequently and also any auto charge that is set up to be applied at the point that the tenancy becomes signed.

In addition to this, check steps 1 – 4 (as shown above) of the let agreed tenancy details. These will re-list the start, fixed and end dates, tenant details and payment details from the import from PropertyAdd ready to be produced as a tenancy agreement in 'Step 5: Print or Post Tenancy Agreement'.

For further information please refer to the full LetMC Training manuals.