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.

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.

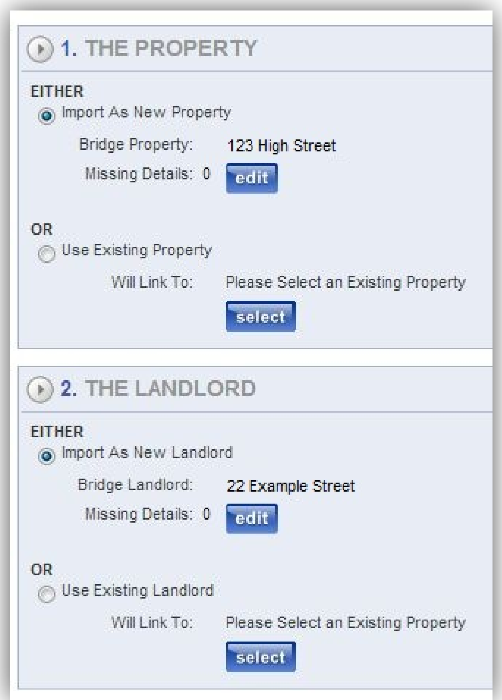
To select a particular property and import it onto LetMC, press the 'go' button for the relevant property on the right hand side of the screen. You will then be taken onto a screen where you can view the specific property information.

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.

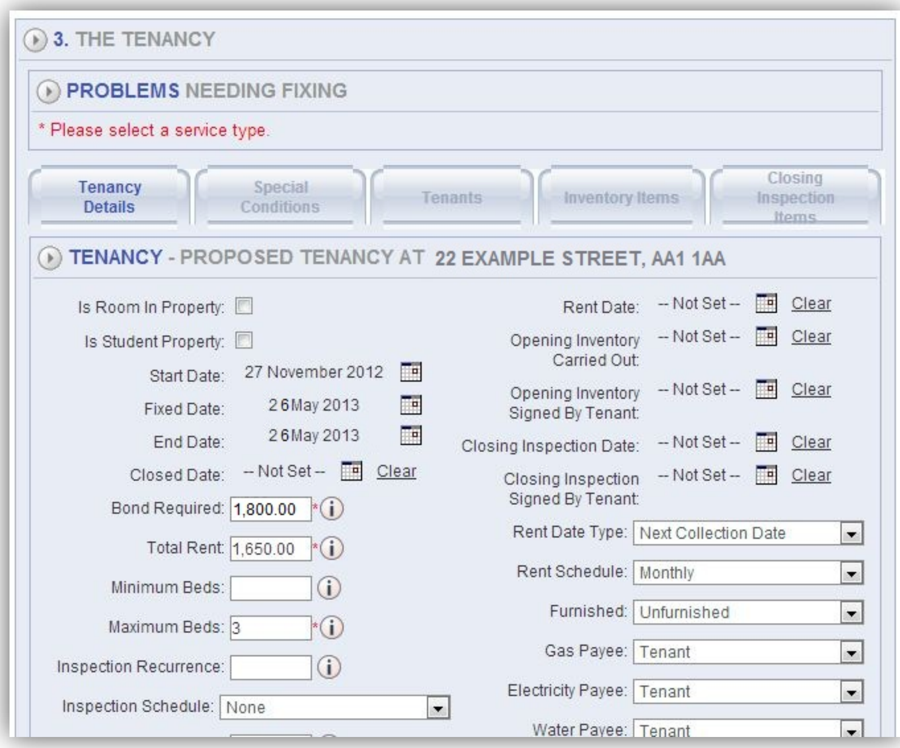
If any information required by LetMC is missing, it will be listed under 'missing details'. Click the 'edit' button to be taken to a screen where the details can be entered.



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 <u>second</u> 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.



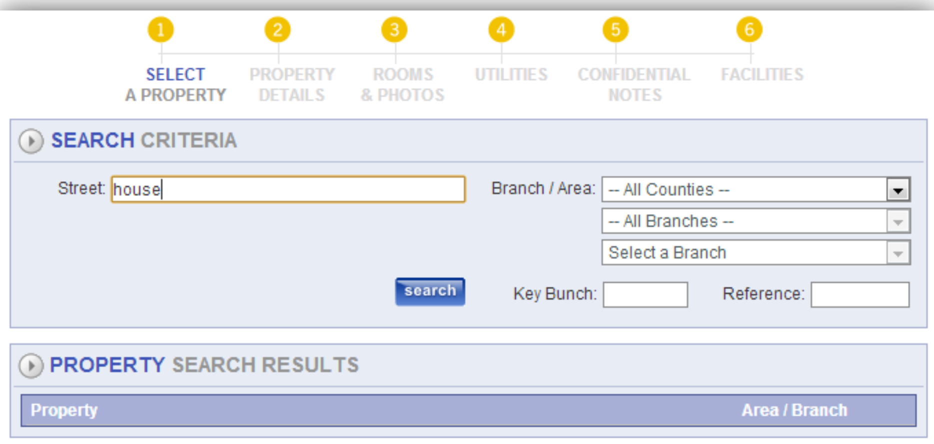
Once these details have been added, click the 'next' button in the navigation bar on the left hand side of the screen. You'll then be presented with a 'confirm import screen'. LetMC will highlight any information still required at this point. If none is required you can click the 'finish button' to import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

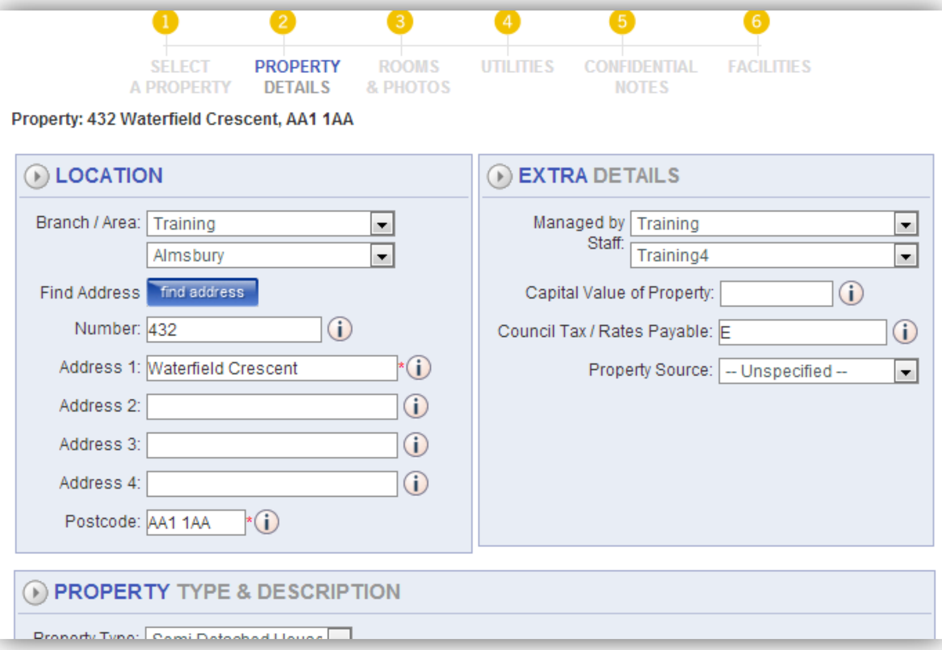
Once imported from PropertyAdd. Four areas will need to be checked to ensure that LetMC has enough information to for property management and accounting. These are:

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

Checking the property

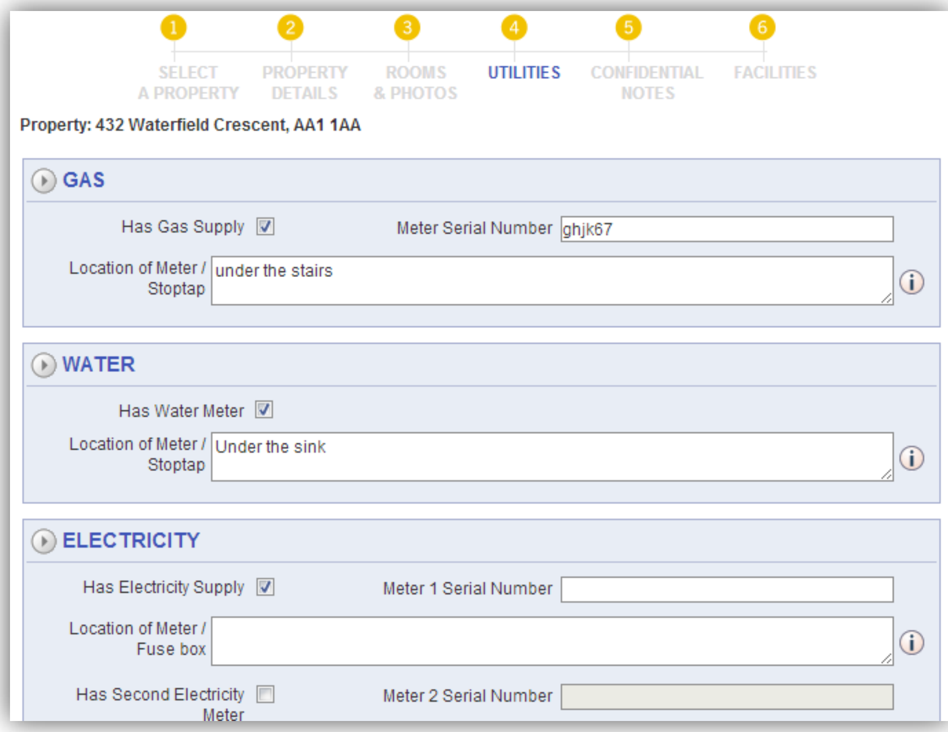
This can be completed in lettings > property > properties > modify a property. Once you have selected 'modify a property' you'll be presented with a search option screen. Search for the first line of the address (without the number) of the property that you have just imported from PropertyAdd and then click search.





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’.

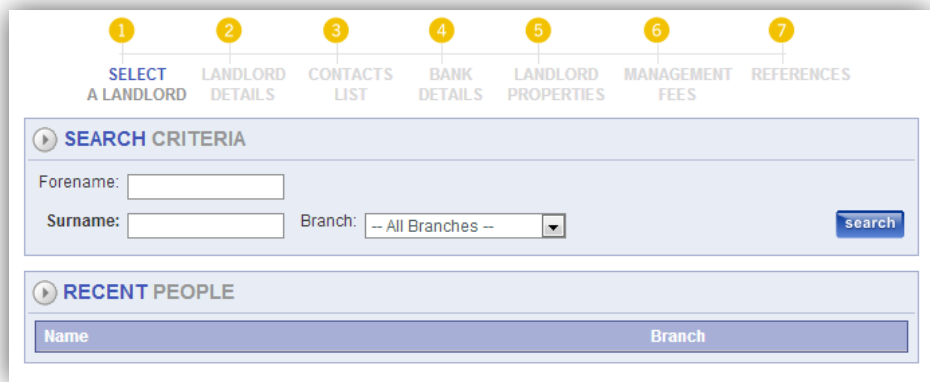
In section 2 make sure that the correct address details have been transferred from PropertyADD and input any other additional information you require.



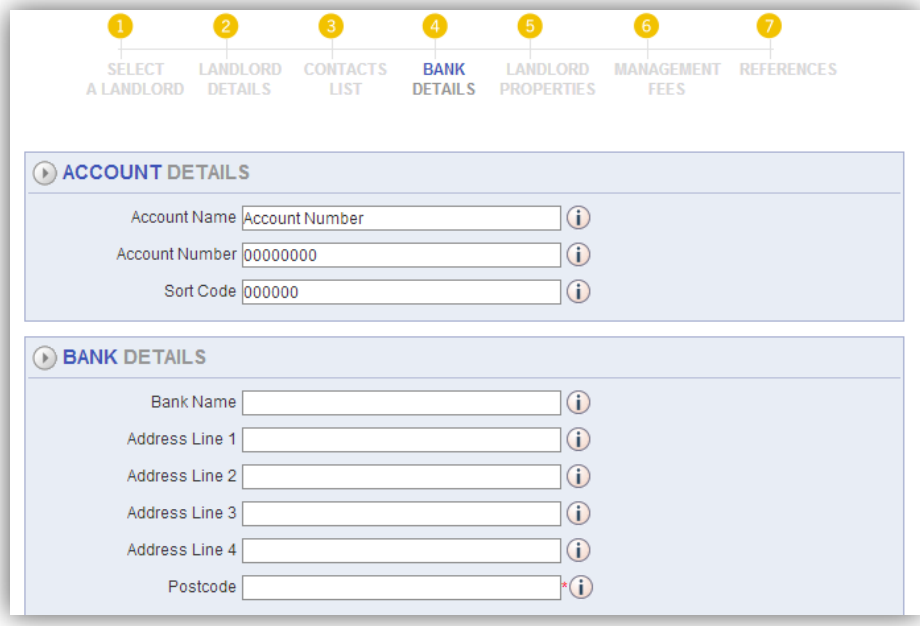
In section 4 make sure you have the correct utility supplies selected along with adding their locations and meter serial numbers. The amount of supplies you have selected here will affect how many opening and closing meter readings you can enter when a tenancy starts and ends. Then click next until you 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.



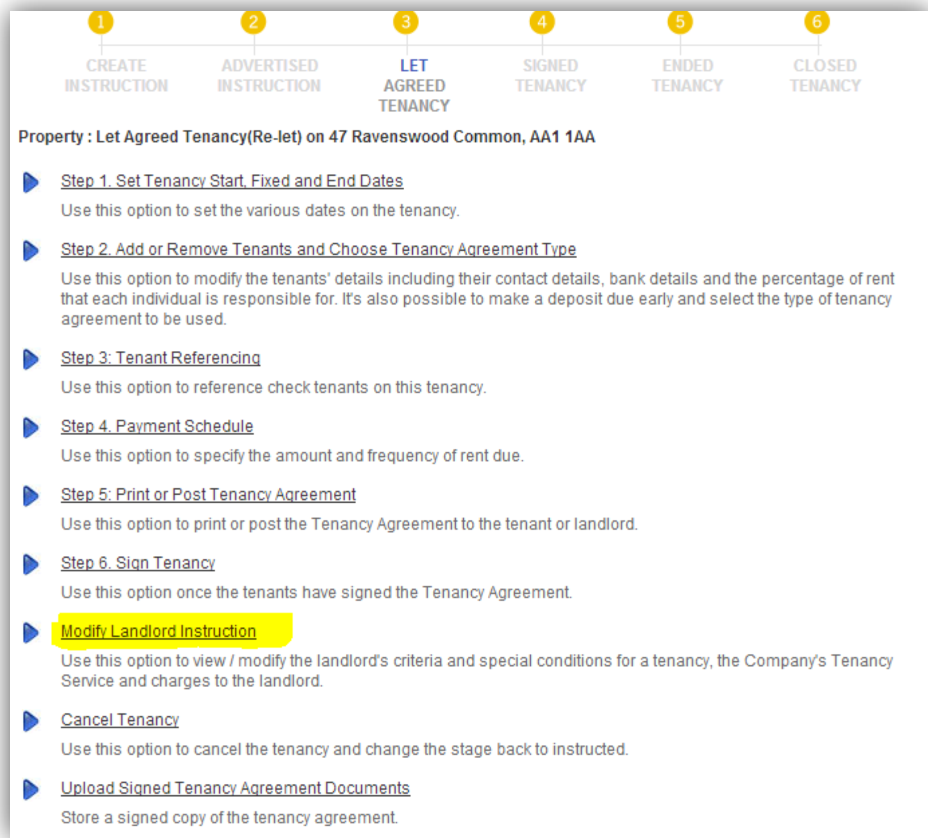
Click ‘next’ on the right hand side of the screen to navigate through the different pages of the landlord record. The areas that will be important to check will be section 2 – ‘landlord details’ where you can check the name of the landlord imported from PropertyAdd, section 3 – ‘contacts list’ where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



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.



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.