



LETTING AGENTS

Automation Checklist

ARE YOU READY FOR 2025?

1. Tenant and Landlord Communication

- ☐ **Automated email and text alerts** for rent reminders, lease renewals, and maintenance updates.
- ☐ **Tenant portals** where tenants can submit maintenance requests, pay rent, and access documents 24/7.

2. Rent Collection and Payments

- ☐ **Online rent payment systems** that allow tenants to pay via credit/debit card, direct debit, or bank transfer.
- ☐ **Automated rent reminders** sent to tenants before rent is due.
- ☐ **Late payment notifications** with automated late fees and reminders.

3. Lease Management

- ☐ **Document generation tools** that automatically create rental agreements, tenancy contracts, and notices.
- ☐ **E-signature integration** for quick and secure digital signing of leases and contracts.
- ☐ **Automated tenant move-in/move-out notifications** to streamline the process.



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4. Property Listings and Marketing

- ☐ **Automated property listing syndication** across multiple platforms (Rightmove, Zoopla, etc.).
- ☐ **Automated lead imports** from multiple sources like Agent's Website, Zoopla, Rightmove, On the Market.

5. Maintenance Management

- ☐ **Automated tenant maintenance request** forms via online portals.
- ☐ **Task assignment automation** to contractors and maintenance teams.
- ☐ **Automated updates** to tenants and landlords regarding the status of maintenance requests.
- ☐ **Reporting automation** to track maintenance issues and generate maintenance history reports

6. Reporting and Analytics

- ☐ **Real-time reporting tools** that automatically generate financial reports, occupancy rates, and other key performance metrics.
- ☐ **KPI tools for performance** tracking like Market Appraisals, Viewings, Move-ins, Move-outs, Renewals and more.



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7. Tenant Applications and Screening

- ☐ **Online application forms** that capture all required information for prospective tenants.
- ☐ **Automated tenant referencing** (background checks, credit reports, etc.)
- ☐ **Tenant screening results integration** to automatically assess applications based on predefined criteria..
- ☐ **Automated application status notifications** to keep applicants informed about their status in the process.

8. Document Management and Storage

- ☐ **Cloud-based document storage** that automatically categorises and stores contracts, agreements, and communication.
- ☐ **Document sharing** tools that allow tenants and landlords to access signed agreements and important documents.
- ☐ **Automated document generation** (e.g., tenancy agreements, reports, invoices) based on templates.
- ☐ **Secure e-signatures** for legally binding document signing, reducing the need for physical paperwork.



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9. Compliance and Legal Requirements

- ☐ **Automated compliance checks** for legal requirements such as gas safety certificates, EPC ratings, and tenant deposit protection.
- ☐ **Automated reminders** for key compliance deadlines, such as certification renewals and tenancy contract updates.

10. Client Relationship Management

- ☐ **Automated reports** are sent to landlords, providing regular updates on rent collection, property status, and maintenance.
- ☐ **Automated messaging** to keep landlords informed about upcoming renewals, tenant issues, and potential vacancies.
- ☐ **CRM systems** that track interactions with landlords and tenants, ensuring timely follow-ups and personalised communication.