PROPERTY STORE

TRAINING MANUAL

VERSION 1.2

DEC 2022

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CONGRATULATIONS!

You have taken your first step in making property management simple. We believe in making things simpler, easier, and more convenient for Property Professionals. As such, Property Store is going to be your 'One Stop Shop' for all your operational needs.

The goal of this document is to help you utilize and maximize all of the features of the Property Store CRM and is designed to be used alongside the Training Videos. From stacking deals to automation, this training manual will help you achieve those, and more!

Get Ready to Maximize Your Productivity with Our All-in-One Property Solution!

JAKE BARLOW

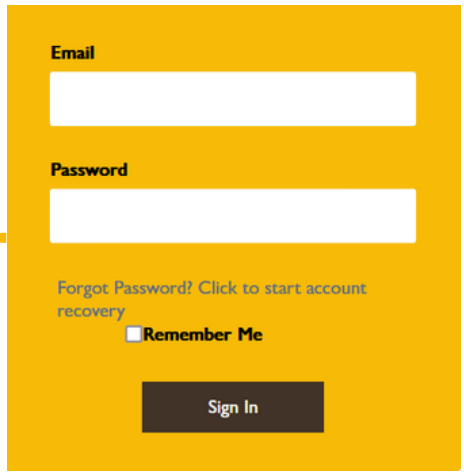
SETTING UP YOUR ACCOUNT

LOGIN EMAIL

Click the link on your inbox from the Property Store Login email.

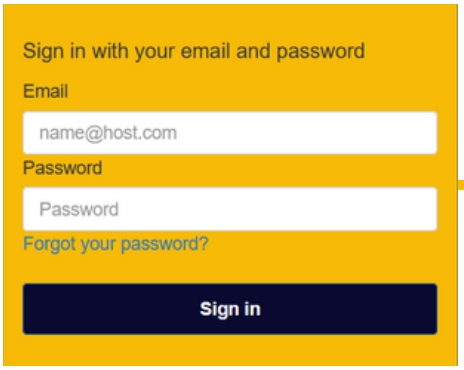
1

2



FORGOT PASSWORD

Click on "Forgot Password?"



3

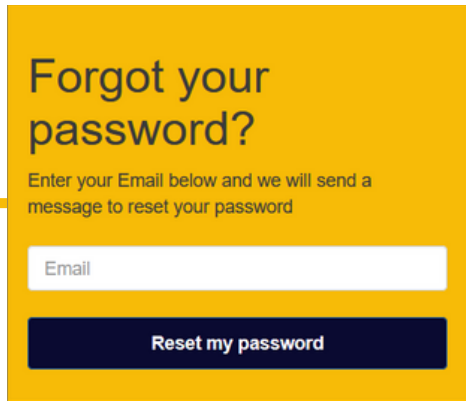
FORGOT PASSWORD 2

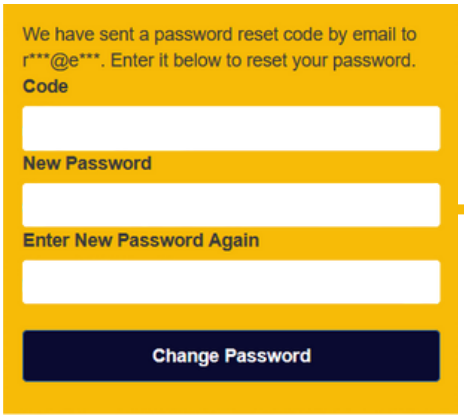
Click on "Forgot your Password"

4

ENTER YOUR EMAIL

Enter email to receive reset code





5

NEW PASSWORD

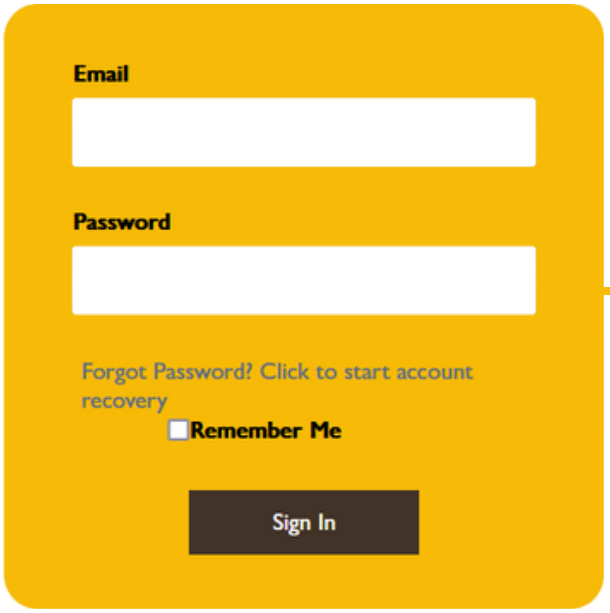
Enter password twice to confirm.

OK!

YOU ARE DONE!

You may now start using Property Store

LOGGING IN



1

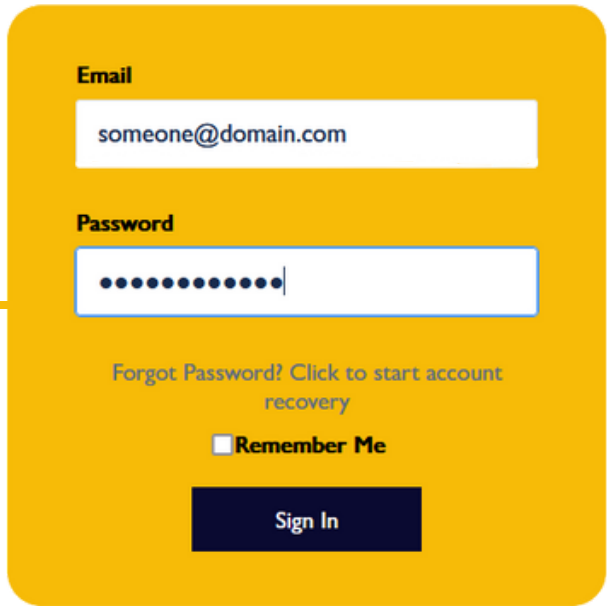
GO TO THE WEBSITE

https://crm.propertystoreapilb.co.uk

CREDENTIALS

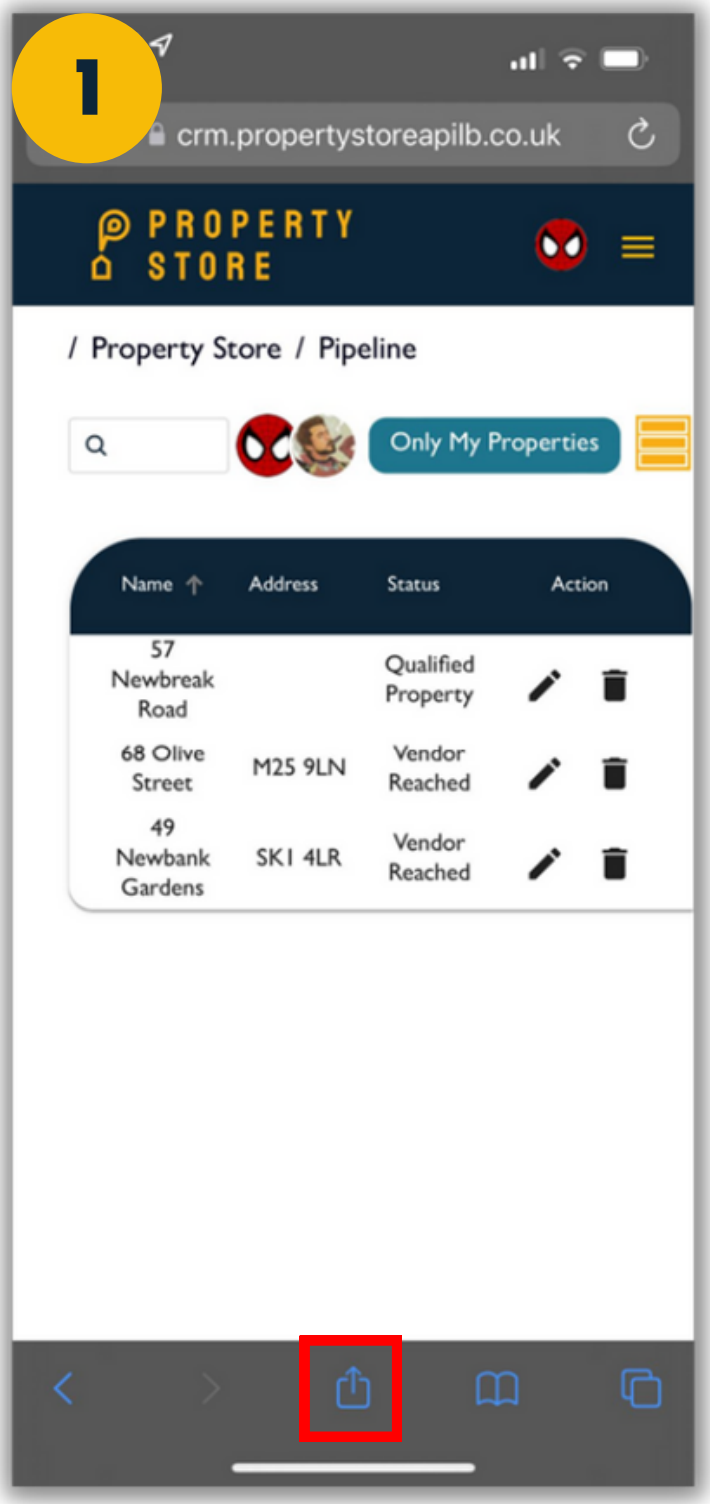
Type in your email and password, and click "Sign In".

2

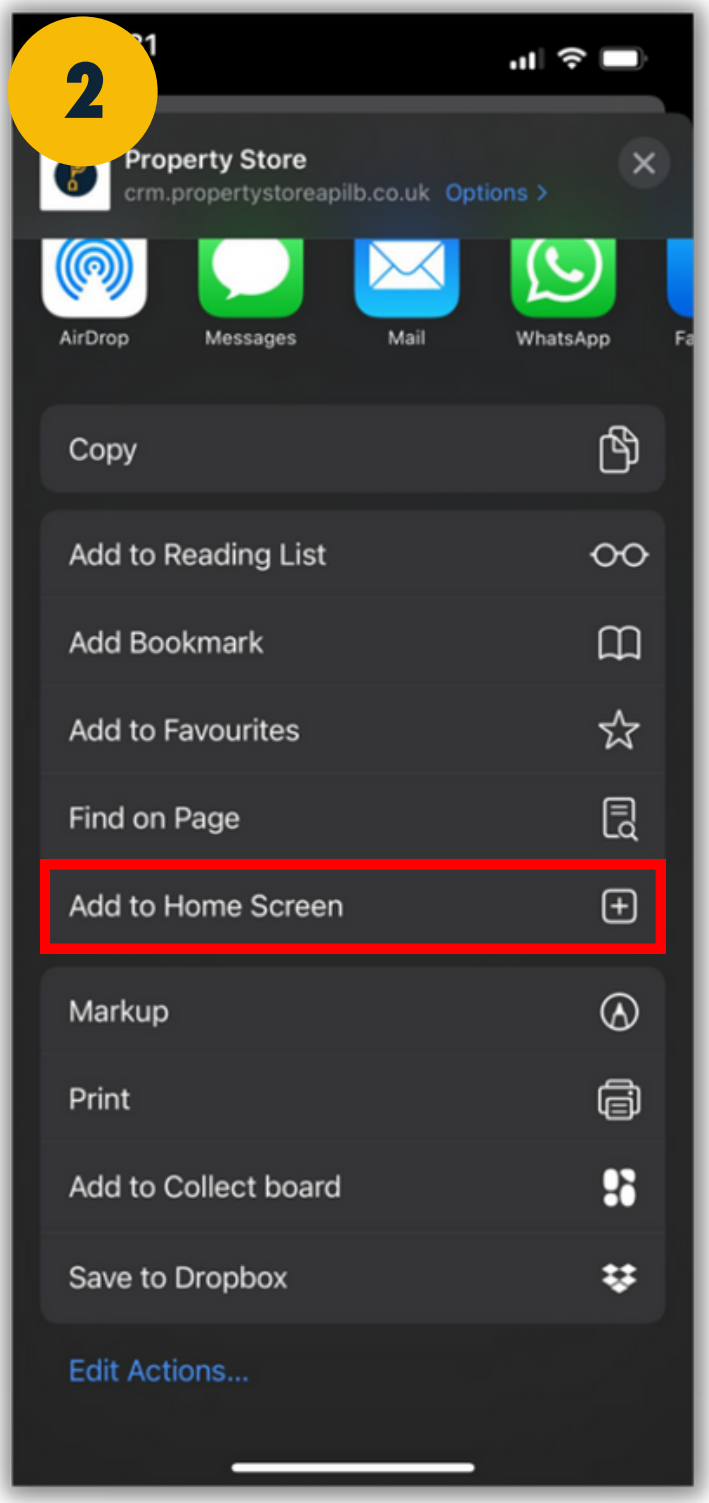


DONE!

SAVING CRM AS AN 'APP'

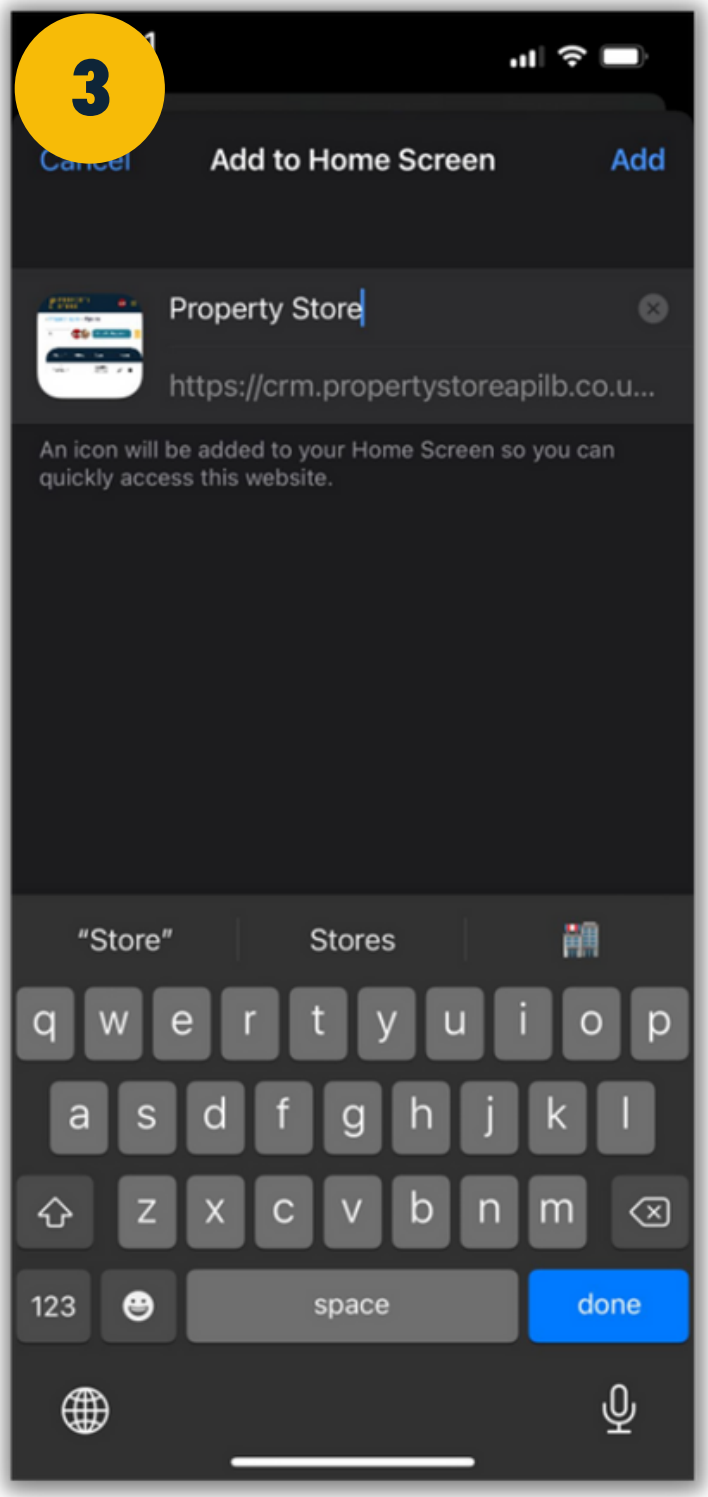


- Visit https://crm.propertystoreapilb.co.uk/
- Click the 'SHARE Button' at the bottom of the screen

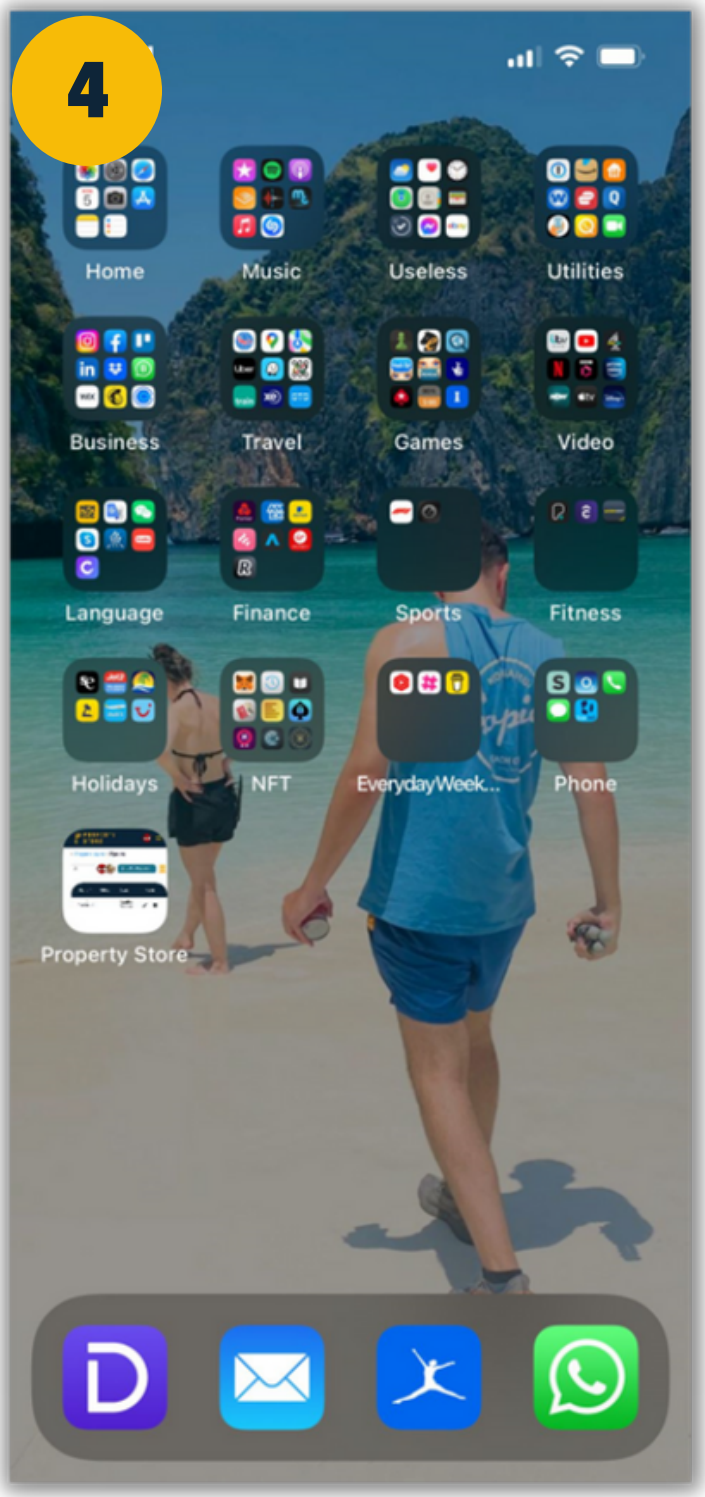


- Click 'Add to Home Screen'

SAVING CRM AS AN 'APP'



- Set a name for the 'App'



- You will now see Property Store as an 'App' on your Home Screen

HELP CENTER

The HELP CENTER is Property Store's support hub. Various functions designed to help you get the most out of the CRM and your subscription is located here. Such as discounts, give feedback, request support, and access to PIPELINE ADMIN.

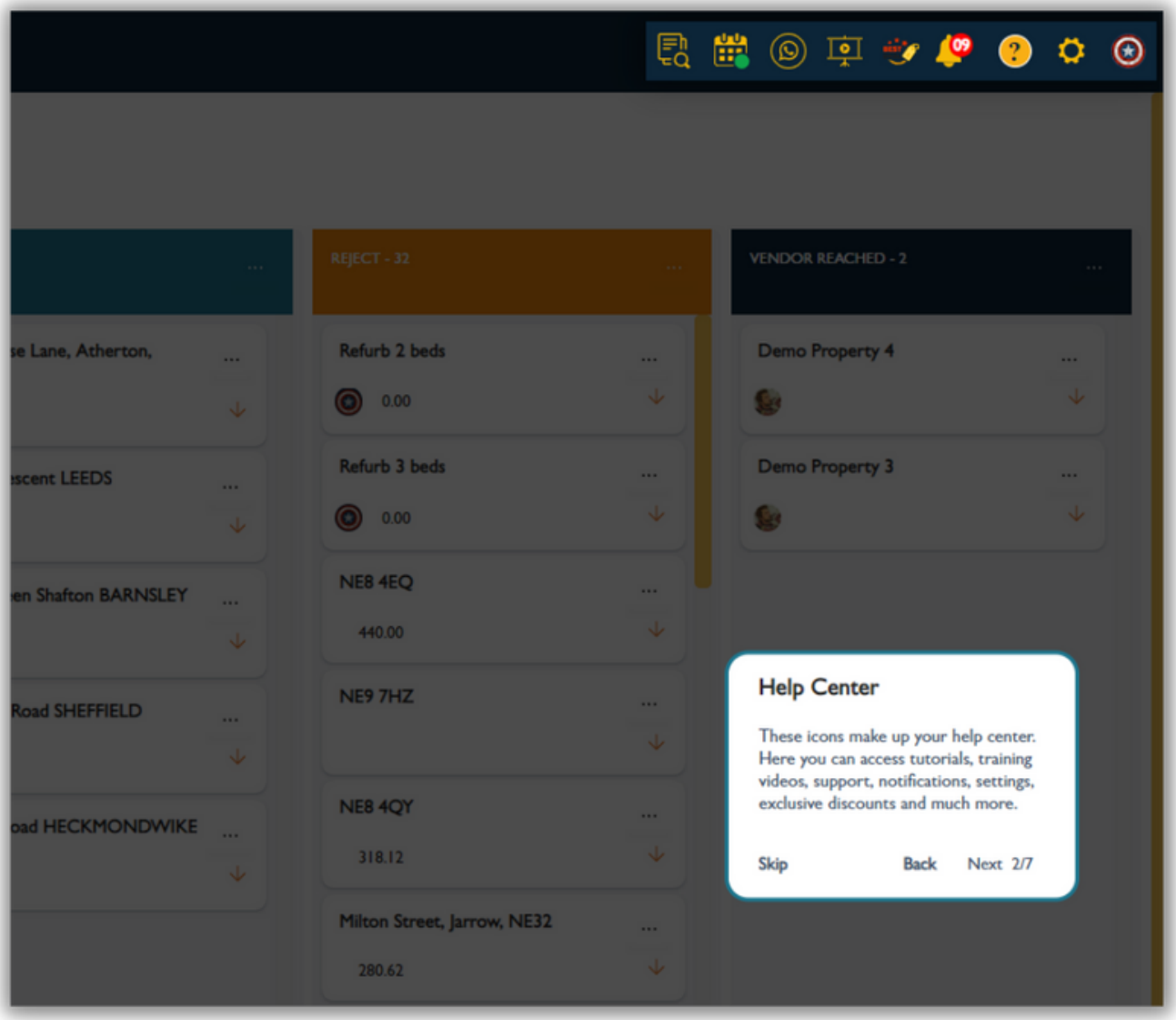
The HELP CENTER is located at the upper right portion of Property Store. Starting from the left, the icons are:

- UI TOUR
- ONE TO ONE CONNECT
- WHATSAPP SUPPORT
- TRAINING VIDEOS
- EXCLUSIVE DISCOUNTS
- NOTIFICATIONS
- GIVE FEEDBACK
- PIPELINE ADMIN
- USER ACCOUNT

HELP CENTER

UI TOUR

Property Store Quick Tour

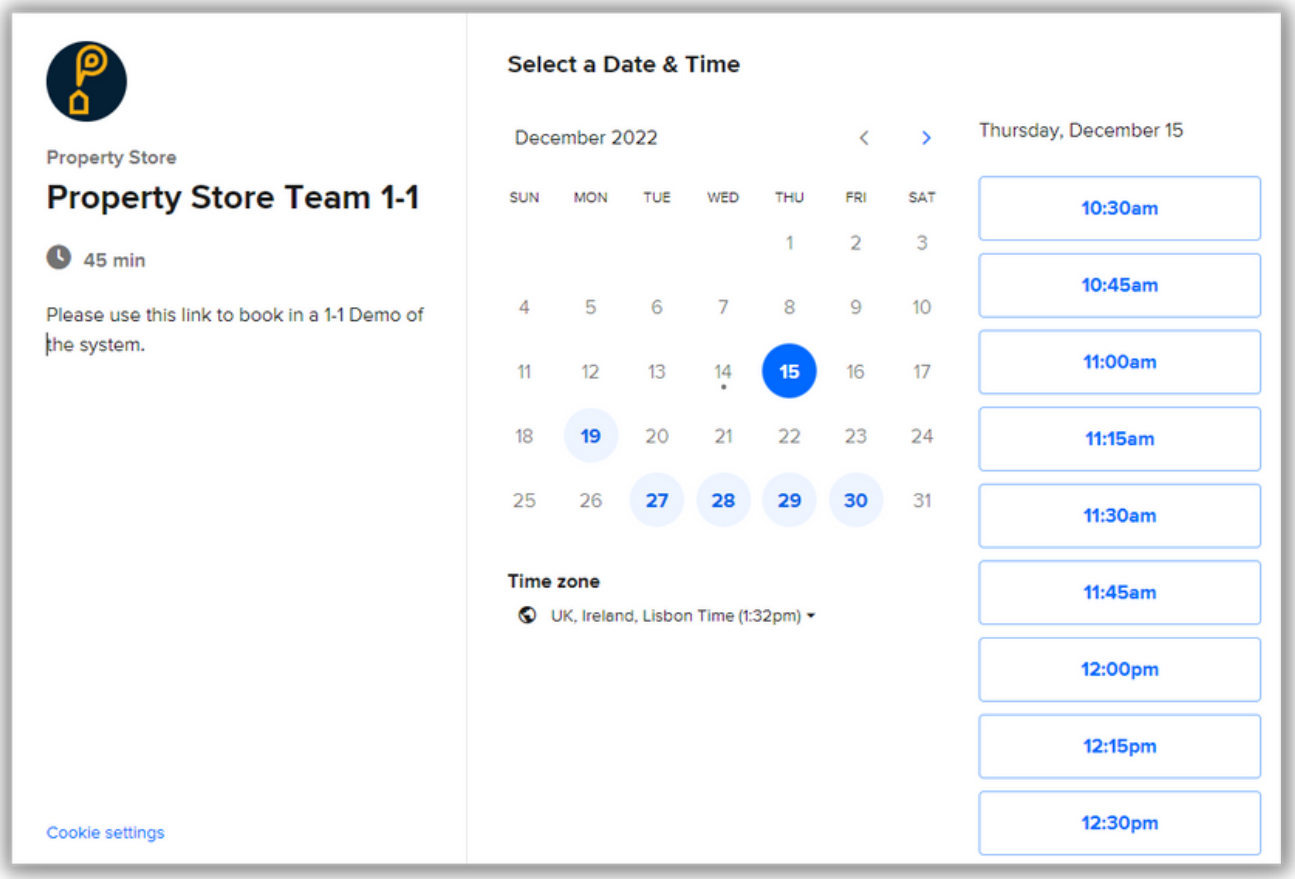


Clicking the UI Tour Icon would highlight some of the User Interface of the CRM. In this image above, HELP CENTER is highlighted and is briefly described since it leads to other resources that are useful for beginners.

Overall, the UI Tour is there to prevent first time users from being overwhelmed. If this is the first time you will be using Property Store or you simply would like a quick refresher, we highly recommended using this function.

ONE TO ONE CONNECT

Property Store Team One To One Booking



Unsure where to start? Want us to showcase Property Store's features? Book a call with us using the One To One Connect Icon. This will lead you to the Team's Appointment Booking System and you may reserve your slot there.

As you may have noticed, our team is in high demand (greyed out weekdays) so make sure to reserve your slot as early as possible.

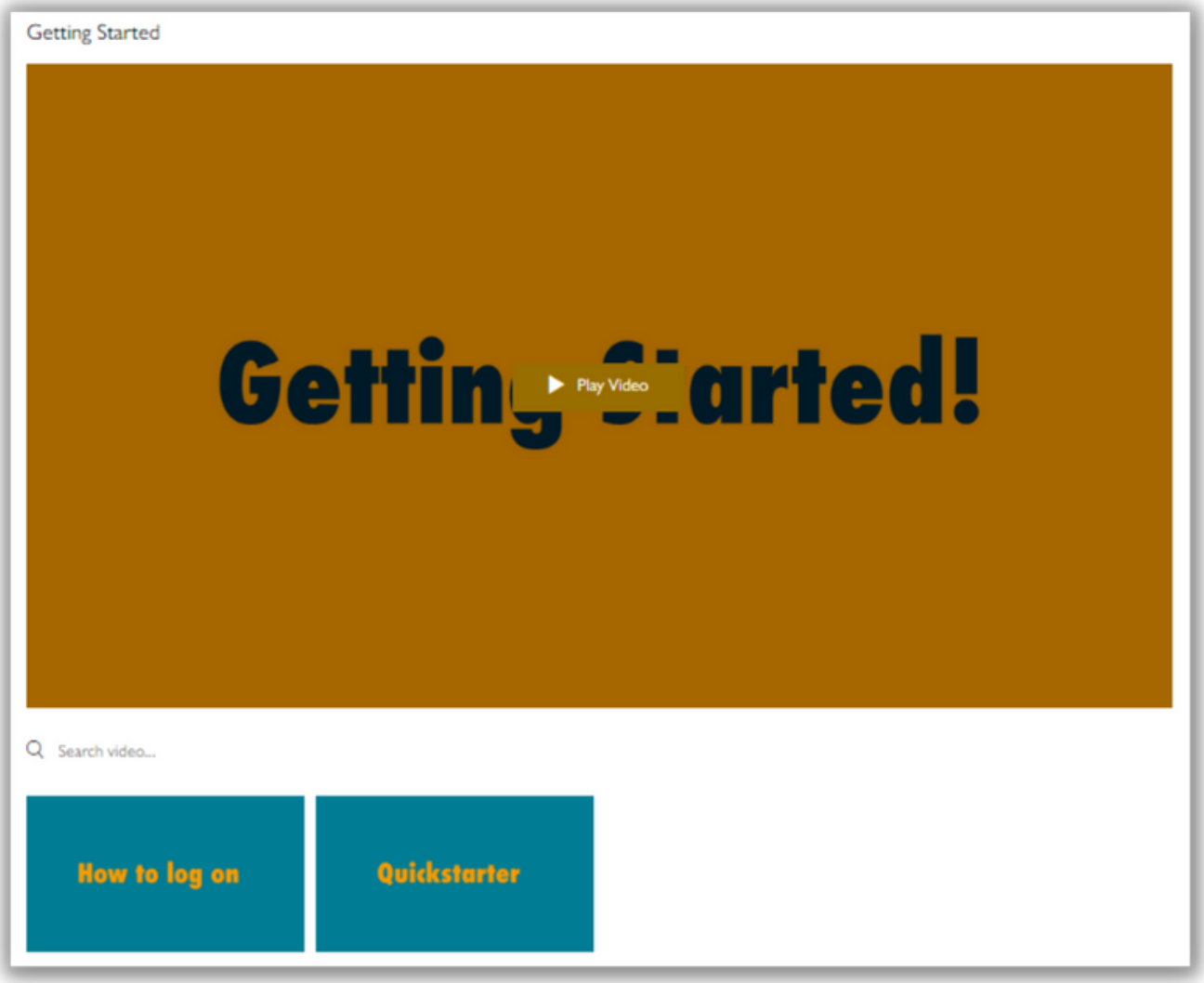
WHATSAPP SUPPORT

Property Store WhatsApp Business Account

The WhatsApp Support icon will show the QR code shown above. Scanning this code will allow you to start a WhatsApp chat with the Property Store support team. We respond as fast as we can but please allow us a few hours to get back to you especially outside office hours.

TRAINING VIDEOS

Property Store Training Videos



The Training Videos icon will open a new tab and lead you to, as you may have guessed, the training videos. We've got videos for all sorts of situations on using Property Store and its functions. If you need help with a certain tool of Property Store we recommend checking out the videos first since there is a full demo in there on how to use the tools of Property Store.

EXCLUSIVE DISCOUNTS

Property Store Members Exclusive Discounts

Deal Sourcing

As a member of Property Store, you will get an EXCLUSIVE £550 of any deal sourced through Kove Properties. All you need to do is contact the team letting them know the email you used to sign into Property Store

How to Claim: Contact Dan@koveproperties.com

Inventory and Reporting

helloreport

As a member of Property Store, you will receive 20% off an annual package with Hello Report. All you need to do is sign up at www.helloreport.co.uk

Contact: www.helloreport.co.uk

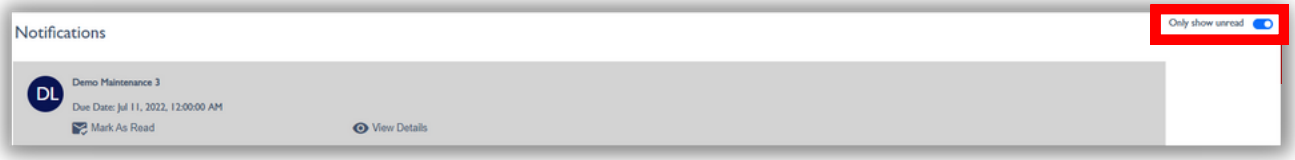
Property Store Members are eligible for discounts across multiple companies that are just as passionate with Property as we are. All of these businesses have been curated by us and have agreed to offer discounts only applicable for users of Property Store.

Just a small fine print from us: Discounts and offerings are subject to change without prior notice. The offers you see above may or may not still be there in the future. As such, we recommend that you grab as many discounts as you can.

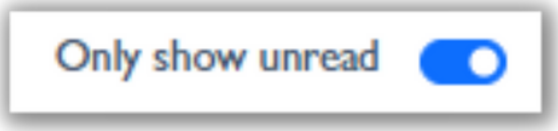
NOTIFICATIONS

Property Store Notifications

If used correctly, Property Store will remind you of anything that you want to be reminded of even if it is not about Property. If you keep forgetting your anniversary, Property Store can remind you a week before the date!



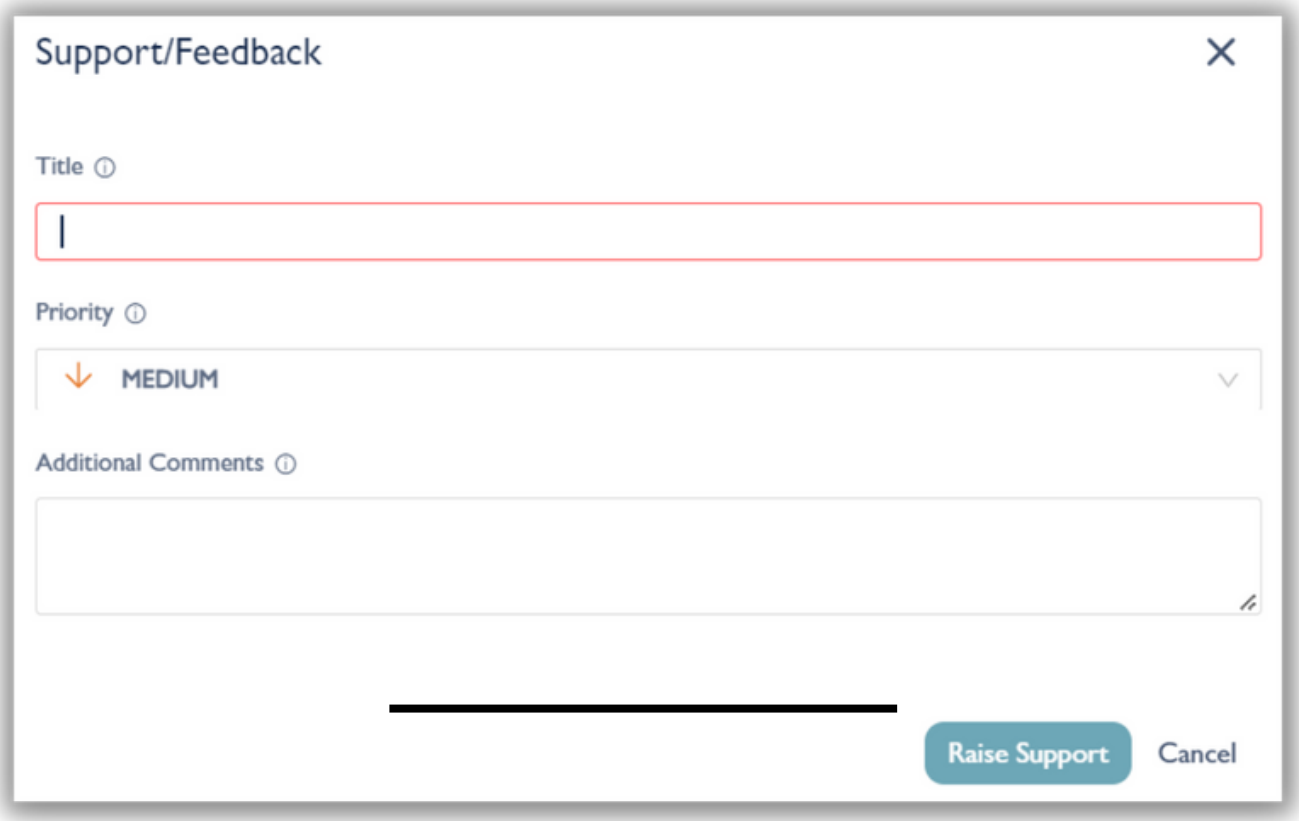
You can also filter your notifications by read and unread using this slider.



TASKS, MAINTENANCE, RENT TRACKING, and many other tools of Property Store that will be discussed further along this manual have functions that include sending you notifications, which can be found via the Notification Bell Icon, that is meant to remove the mental load of remembering small but important details.

GIVE FEEDBACK

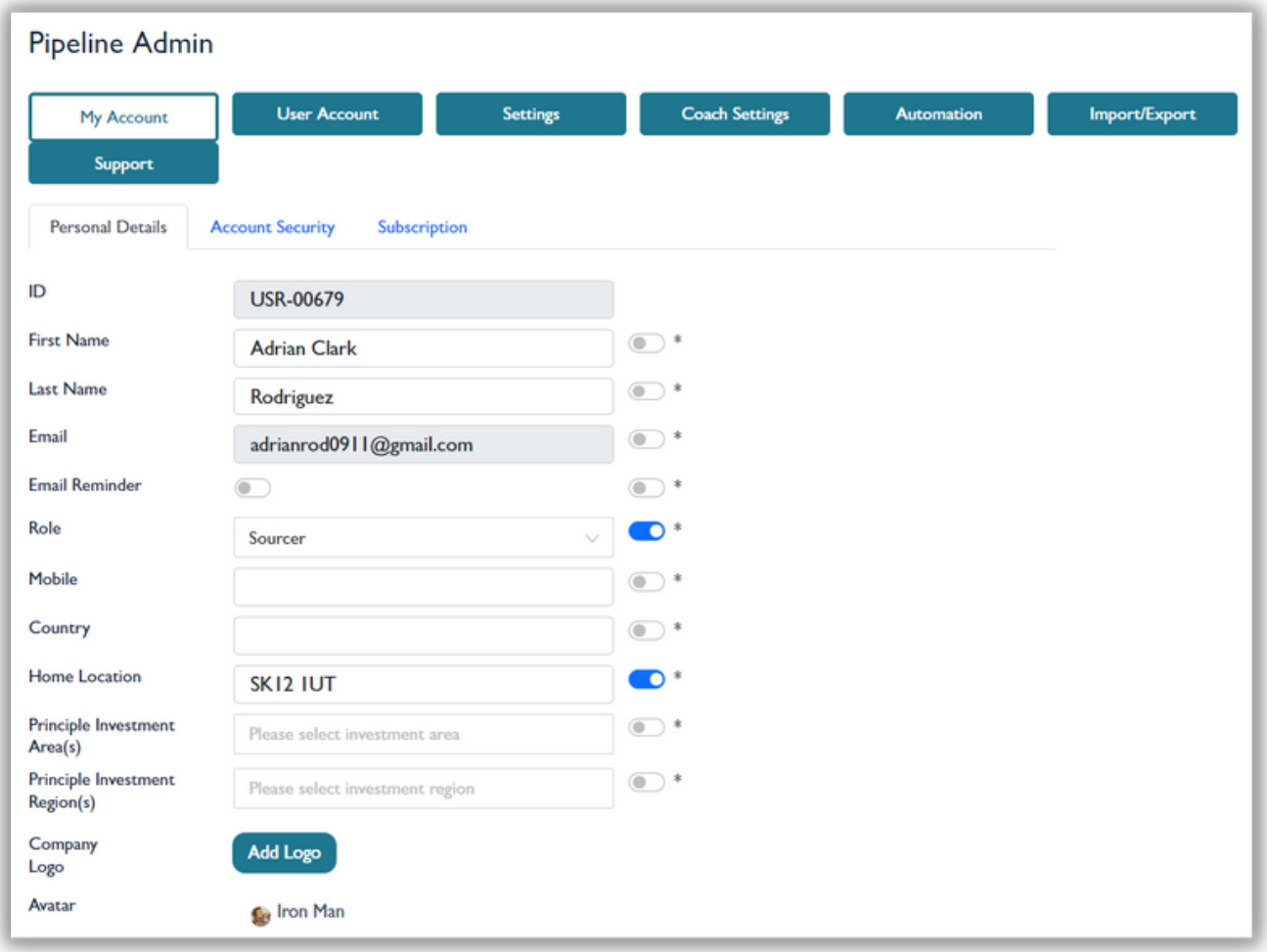
Giving Feedback



Do you have any comments, suggestions, or reactions that you would like to share with us? You can use this form to send us a message and we will make sure to read it.

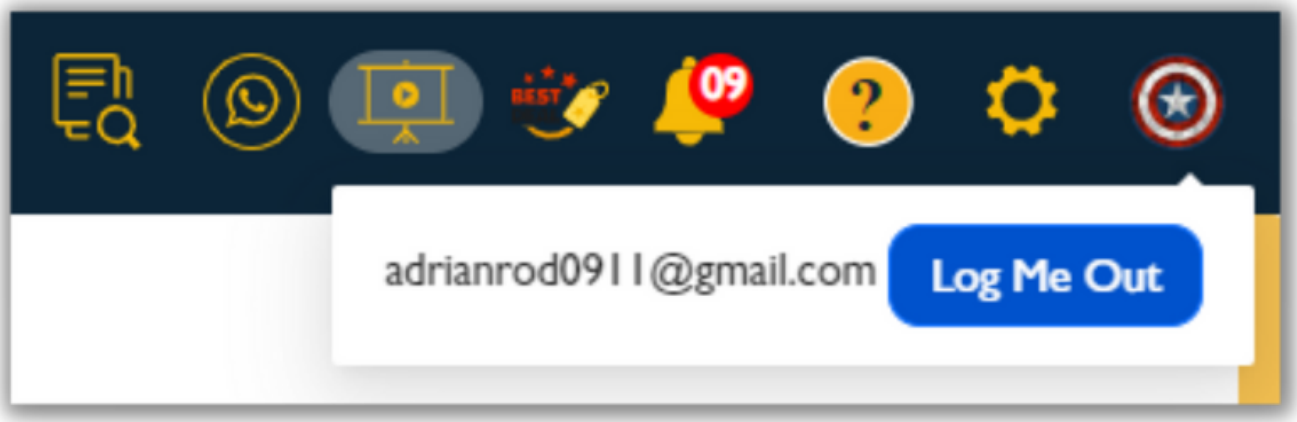
Found a bug/glitch or are you having any issues? You may contact us via this form or through our WhatsApp business account. Please include as much details as possible and steps to replicate the issue. This will make it easier for us to fix it as soon as we can.

PIPELINE ADMIN



PIPELINE ADMIN will have its own separate discussion as it is one of the most important part of Property Store and requires its own section. As you can see from the picture above, it involves your personal data and how you want it to be shared to other Property Store members.

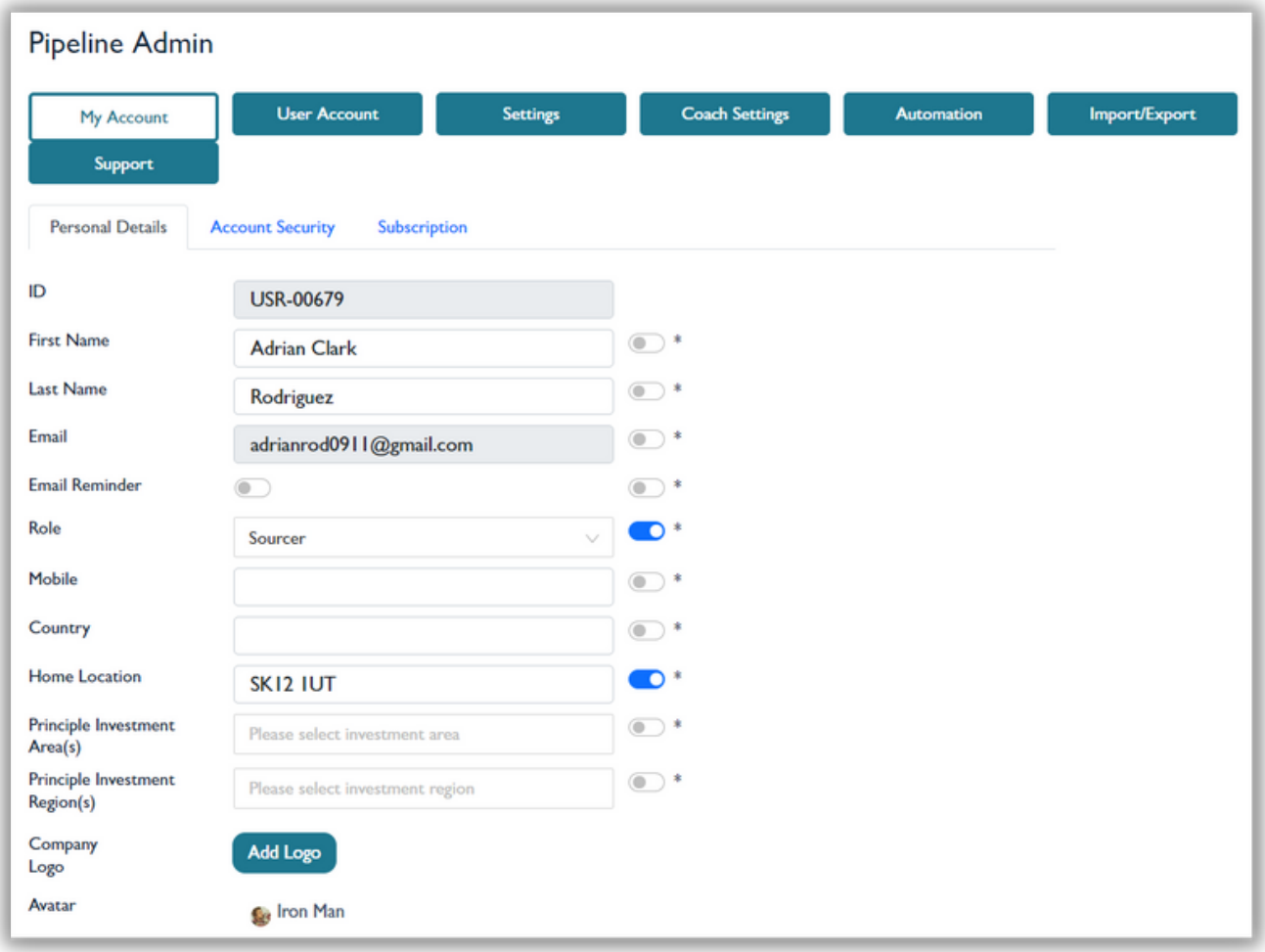
USER ACCOUNT



The USER ACCOUNT Icon have 2 simple yet important functions. First, if you have multiple users on a single device, you can check here which account is logged in. Lastly, it allows you to log out of your account. While these functions may not be of use to everyone, it can certainly be useful to members on the higher tiers and for coaches.

PIPELINE ADMIN

The PIPELINE ADMIN is where all your core information is stored. This is where you will set your Defaults and your Account Information.

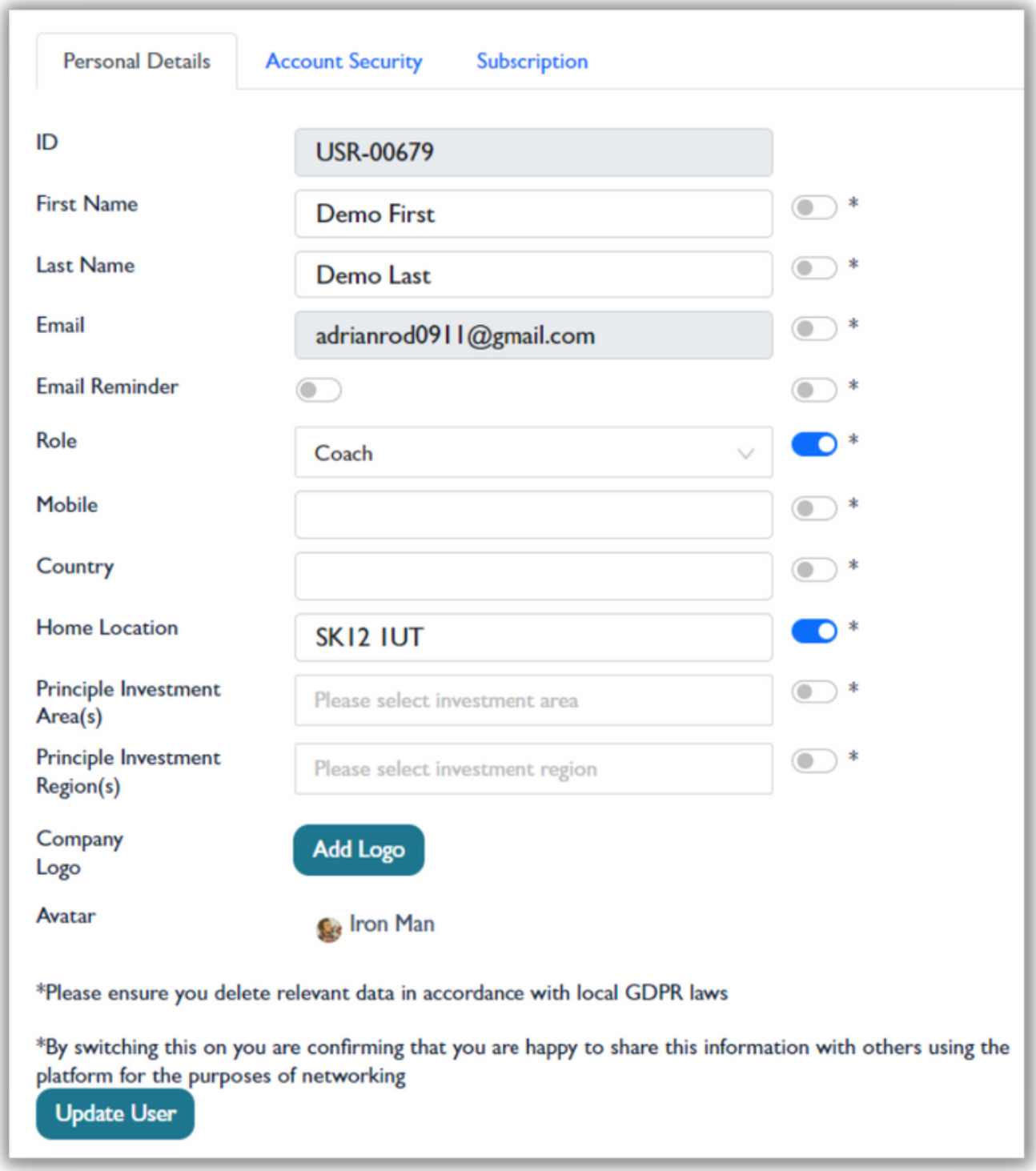


To access, look into the upper right portion of Property Store and you will see the icons below:

Click the GEAR icon and you're there.

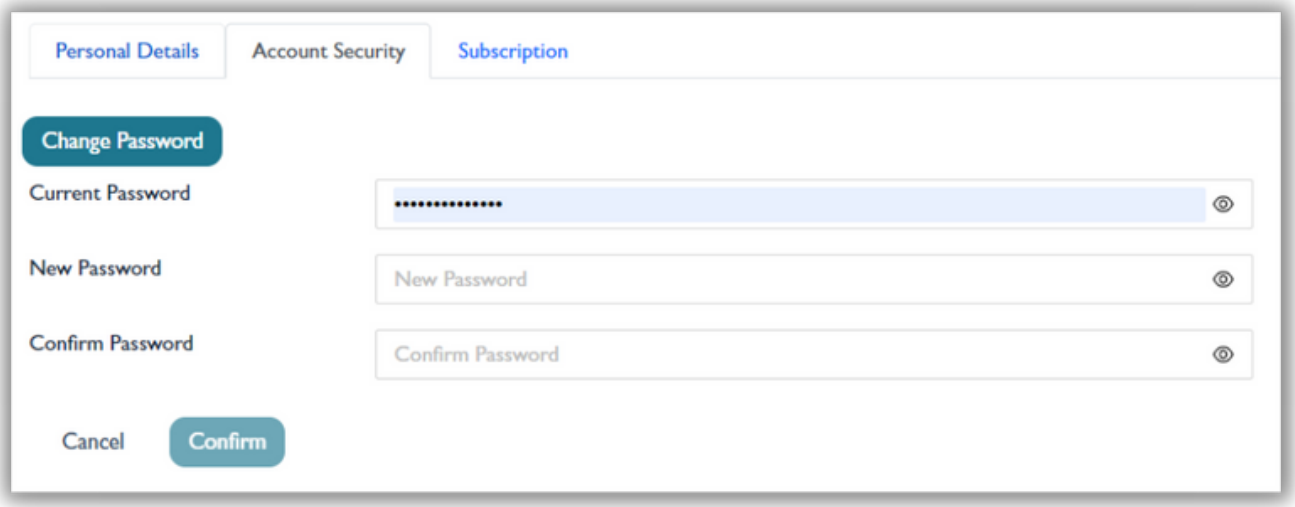
MY ACCOUNT

1. Editing your Account Details.



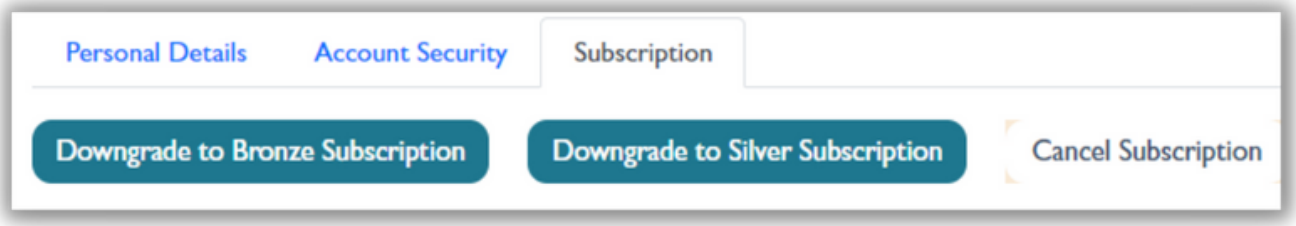
Fill in the appropriate boxes with your personal details. The slider beside each data is to allow you to choose which data you are willing to share to the network. To finalize your changes, please be sure to click the "Update User" button or the changes won't take effect.

2. Changing your password.



Switch to Account Security if you want to change your password. Input your password twice and click the "Confirm" button.

3. Changing your subscription.

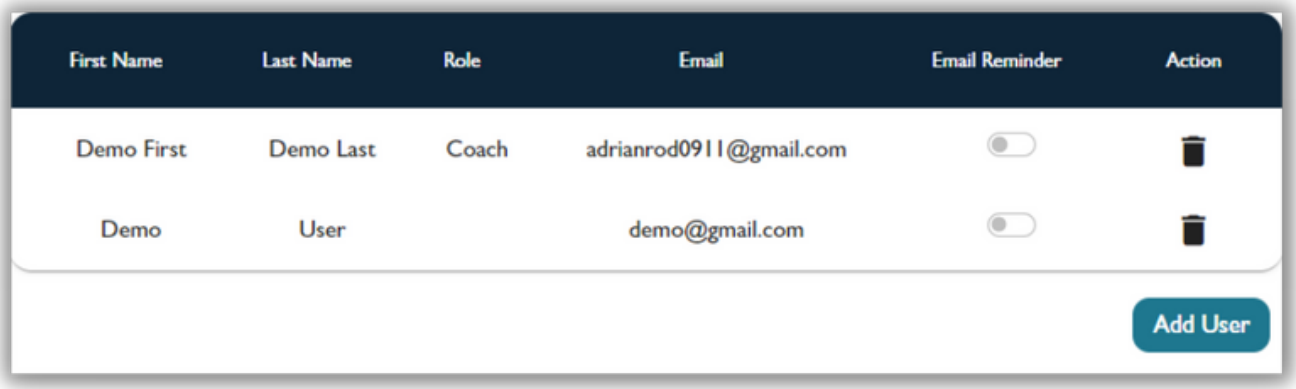


If you want to UPGRADE, DOWNGRADE, or CANCEL your subscription, switch to the Subscription Tab and choose the appropriate button. You will then be asked to type in the word "confirm" on the form that will appear. This is to prevent accidental clicks. Property Store will never hinder anyone if they want to make changes or cancel their subscription.

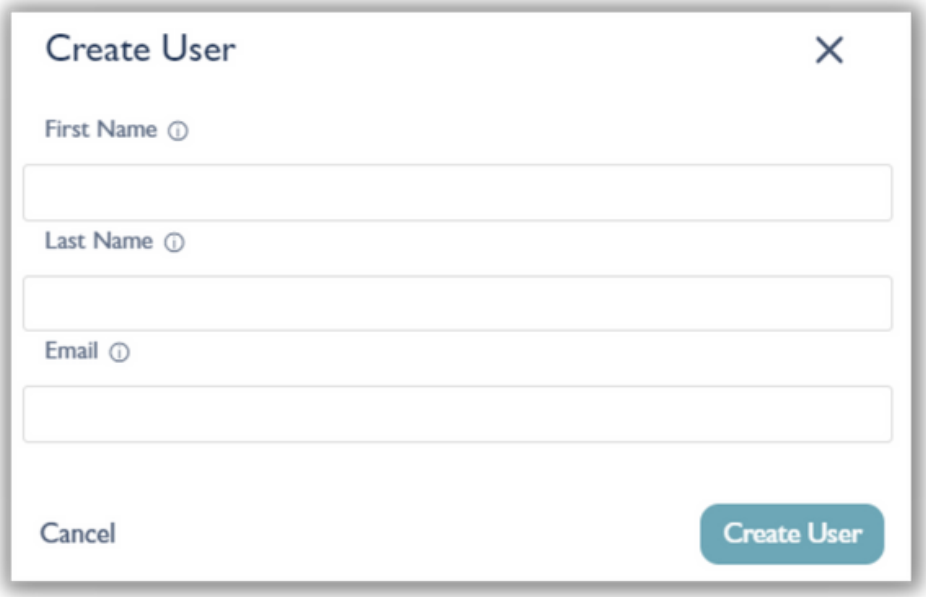
USER ACCOUNT

1. Add or Remove Existing Users

For our users in the SILVER or GOLD Package, you may add multiple users on a single account. This is to make cooperation smoother and faster. We made it so that you can assign tasks to individual users to make it easier to track who gets to do which.



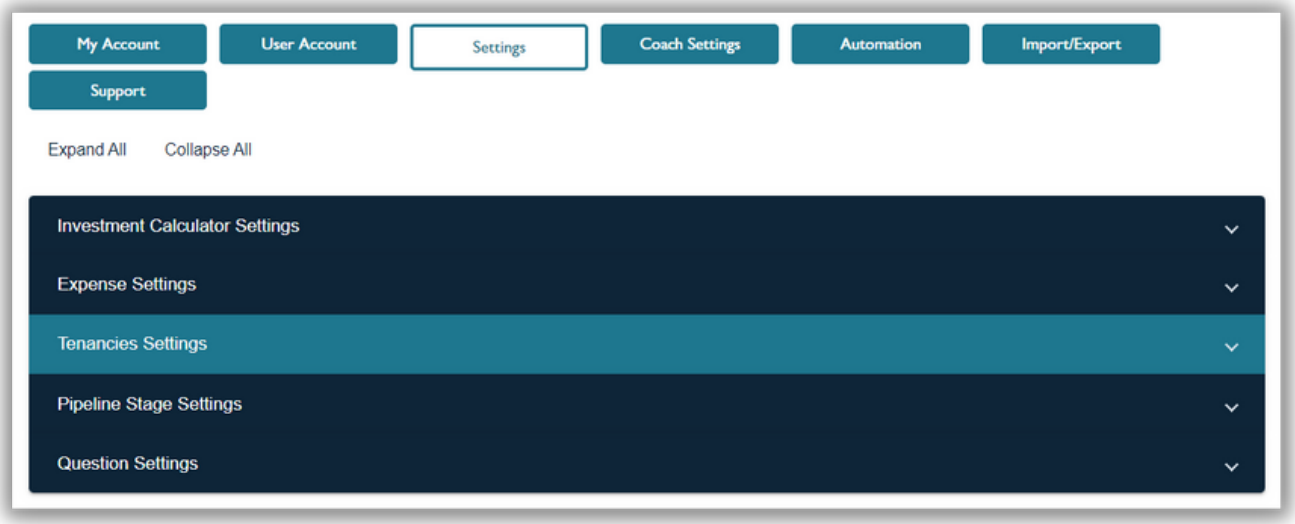
Simply click the "Add User" button and the Create User form will appear as shown below:



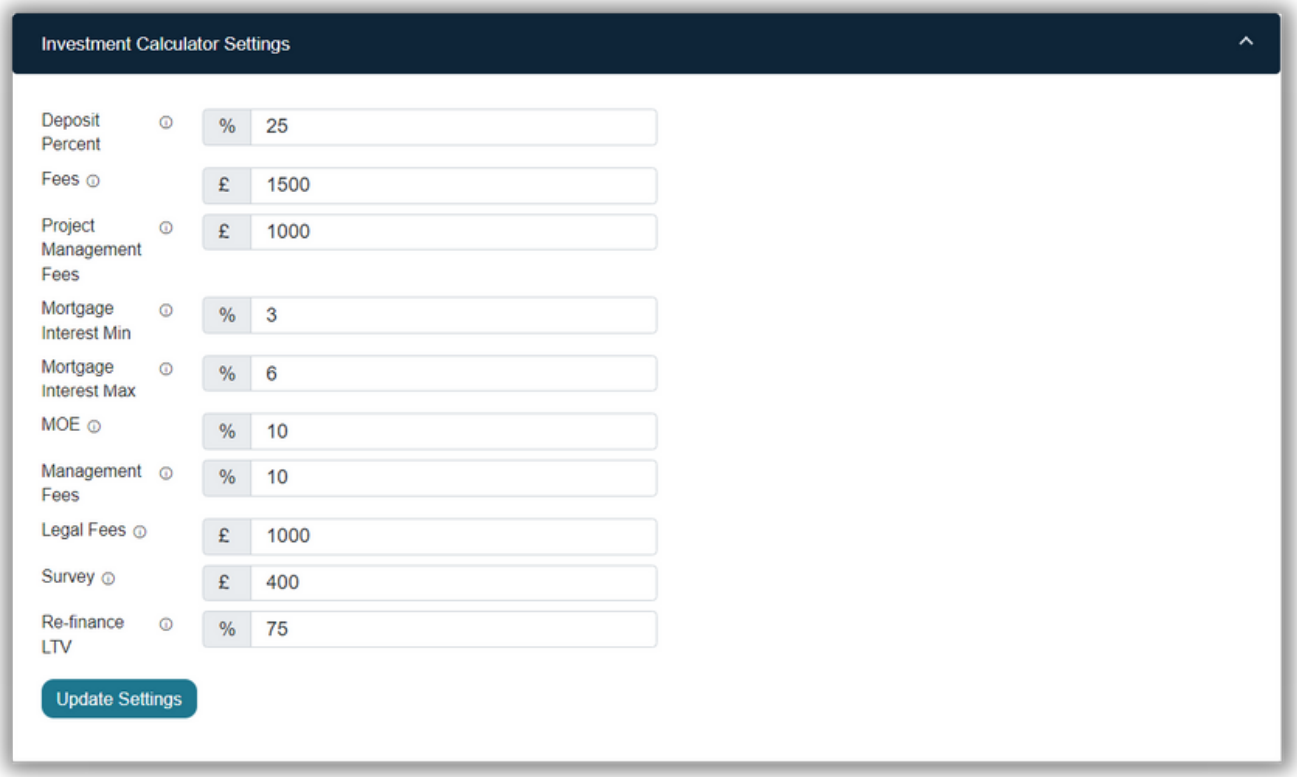
Fill in the details of the new user especially their email address. The system will automatically send the new user an email and he will be able to setup his own account.

SYSTEM

The System Tab is the heart of PIPELINE ADMIN. This is where you will be able to set your default settings so that you won't need to type in everything for every deal that you qualify. You can also edit the SMS reminders here for your viewing appointment reminders.

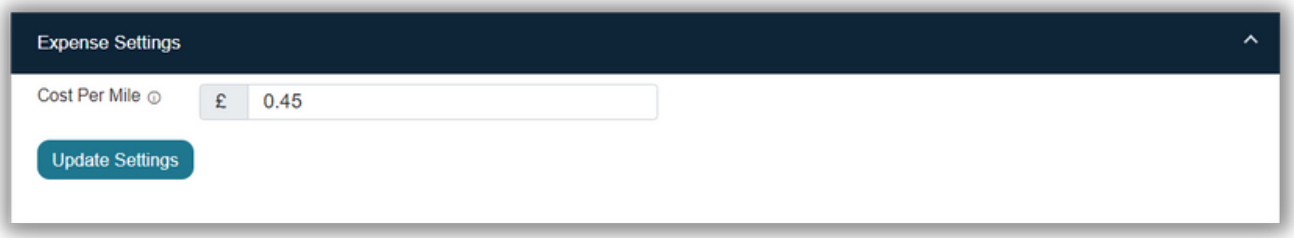


1. Investment Calculator Settings



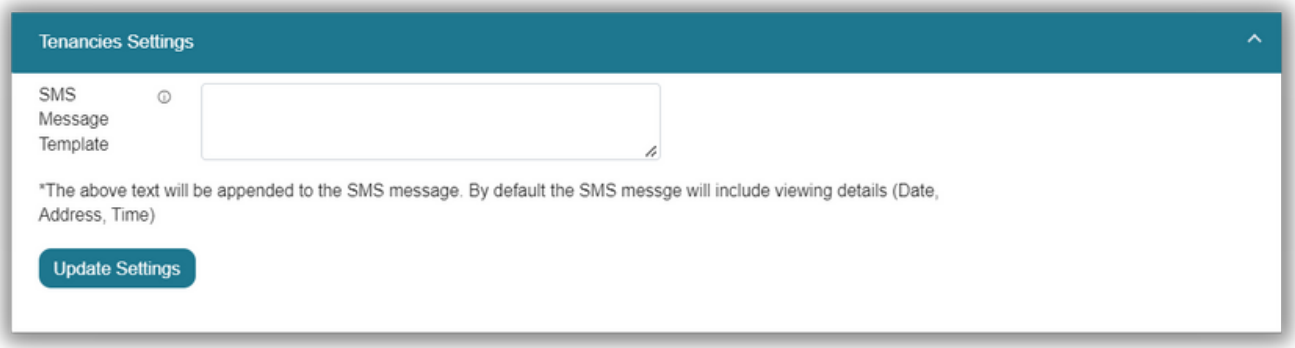
Set your INVESTMENT CALCULATOR defaults here. Ensure that you click the "Update Settings" button to save your changes.

2. Expense Settings



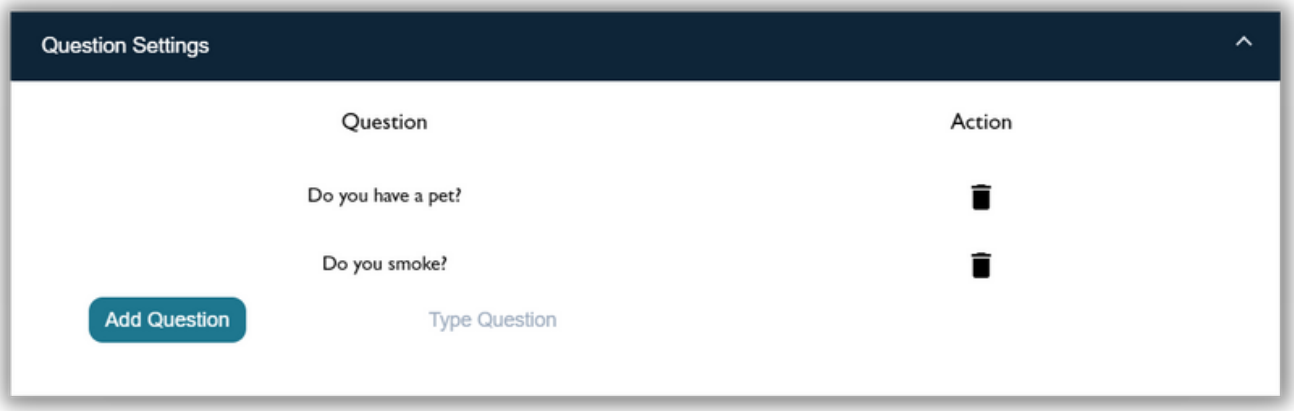
Property Store has an Expense Tracker for you to use that will be discussed on the Gray Sidebar Section. Driving to check out the property in person is a very common expense and as such, we made it so that you can set a default "Cost Per Mile" value and to make it easier to track this expense.

3. Tenancies Settings



This is where you can set the SMS Message Template for when you are setting up viewing appointments. This is to prevent your prospective tenants from forgetting their viewing time.

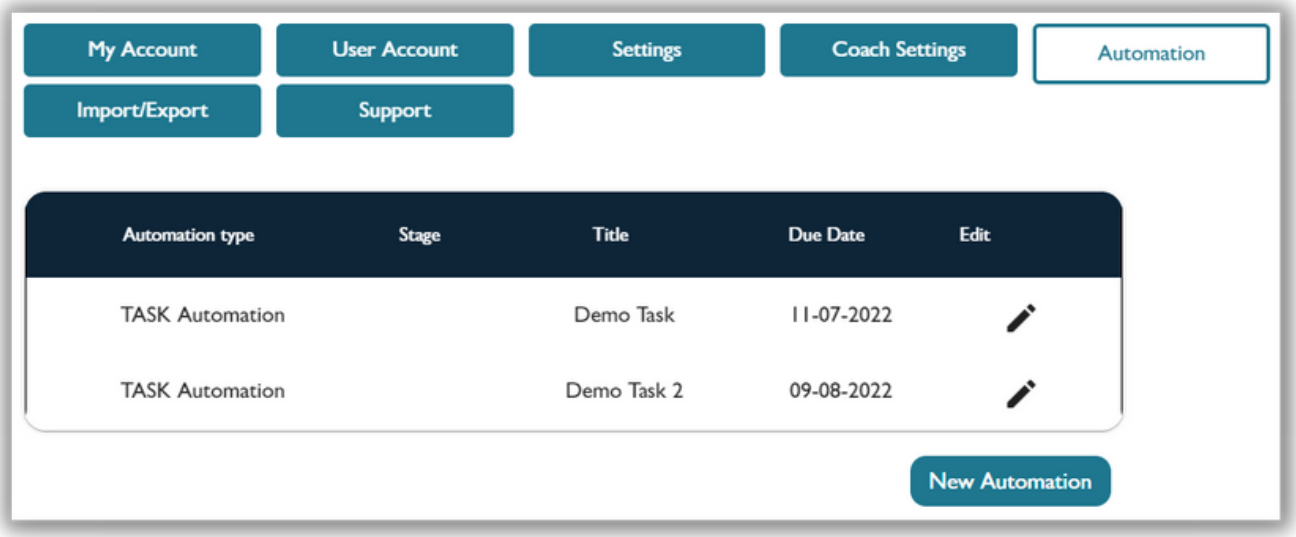
4. Question Settings



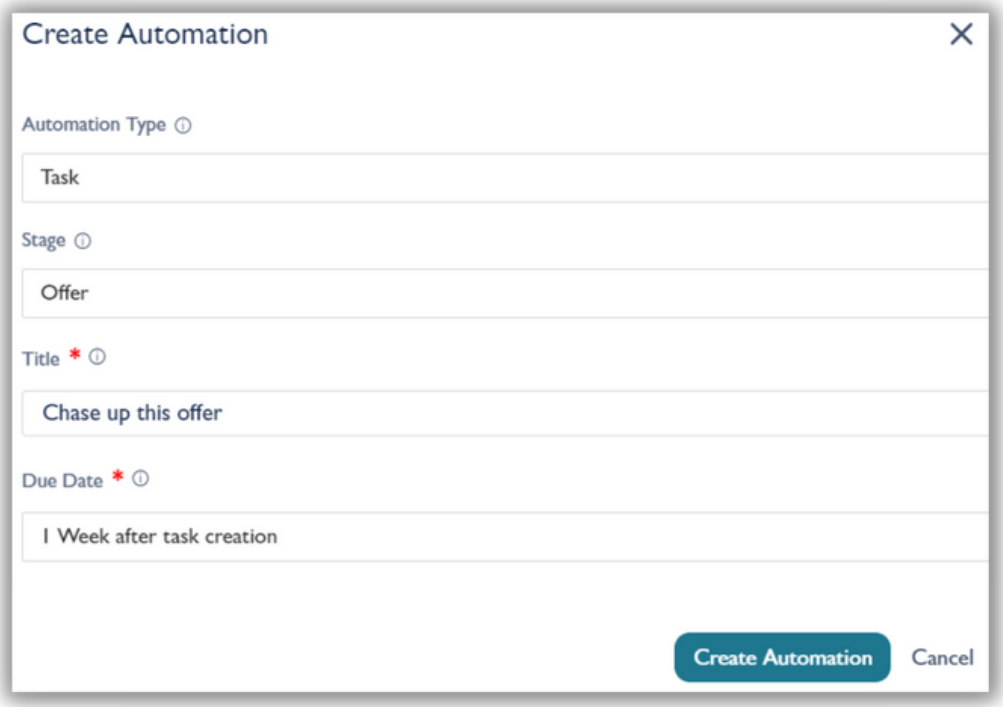
You can add or remove your default questions here for your prospective tenants so that you don't need to type it out for each tenant.

AUTOMATION

Automation is one Property Store's most powerful tools. If used correctly, it will allow you to remove mundane tasks so that you can focus on what's really important for property investors: Looking for Deals.



This tool will allow you to automate the creation of TASKS and MAINTENANCE Tickets. Click the "New Automation" button to create your first automated task. Here is an example:

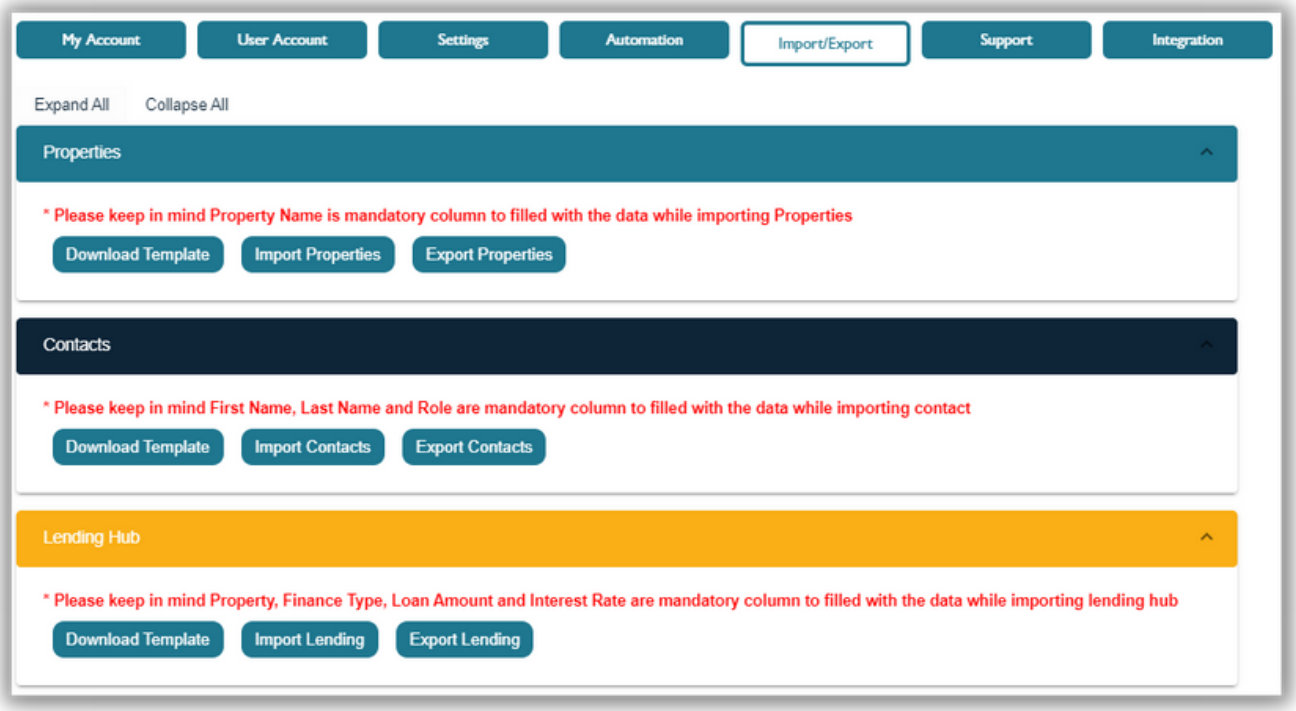


If we fill in the CREATE AUTOMATION form this way, what this means is that we want the system to create a TASK that would remind me 1 week after task creation to Chase up this offer whenever I move a property in my PIPELINE to the Offer Stage. What I created is a reminder to contact the seller again to see if he's still interested on my offer.

Need help? We got you! We have training videos available for you or you may contact us and we would be happy to help.

IMPORT / EXPORT

We have made it easier to transfer your Properties, Contacts, or Lending to Property Store for you and you can do it here in this tab.



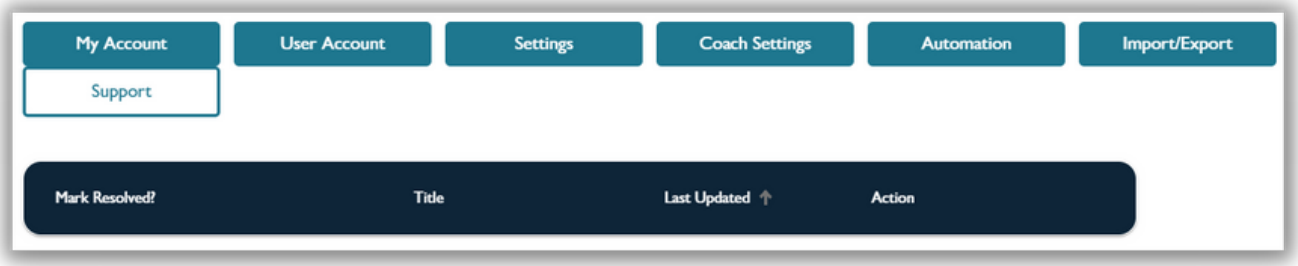
Click the "Download Template" button and you will get a spreadsheet that is pre-formatted. Fill that spreadsheet with your property details and then click the "Import Properties" button to upload that spreadsheet to Property Store and the system will add your portfolio to your PIPELINE.

Similarly, you can do the same with your Contacts and Lending. Download the template. Type in the names and the details and upload it to Property Store via the "Import Contacts" or "Import Lending' button.

Just a small reminder, the "Property Name" field is mandatory for importing PROPERTIES. On a similar note, importing Contacts and your Lending also has the same restriction. Don't worry! As you can see, the system will remind you of these guidelines whenever you are planning to import CONTACTS, PROPERTIES or LENDING.

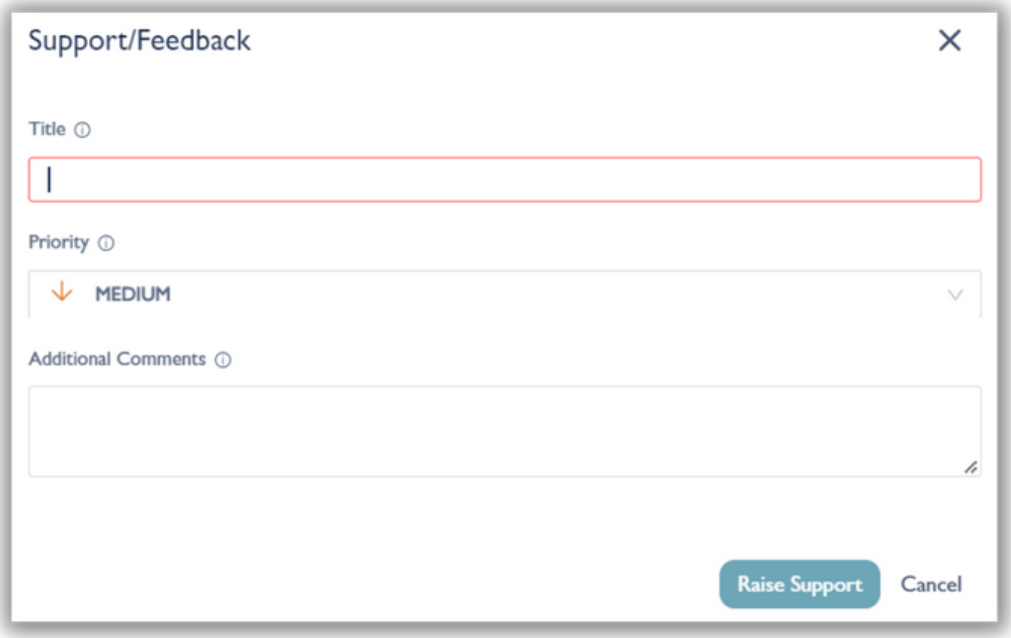
SUPPORT

This tab is where all your support tickets for Property Store will be located in case you encounter any errors or bugs while using the CRM.



To send a ticket, look into the upper right portion and find the icon of a circle with a question mark inside. This is beside the GEAR icon used to access PIPELINE ADMIN as shown below:

Clicking on that icon will show the Support/Feedback form as shown below:



Please include as much details as possible and steps to replicate the issue. This will make it easier for us to fix it as soon as we can.

ORANGE SIDEBAR

The Orange Sidebar is used for user generated content such as adding PROPERTIES and creating TASKS. The Orange Sidebar will always be visible on the left.

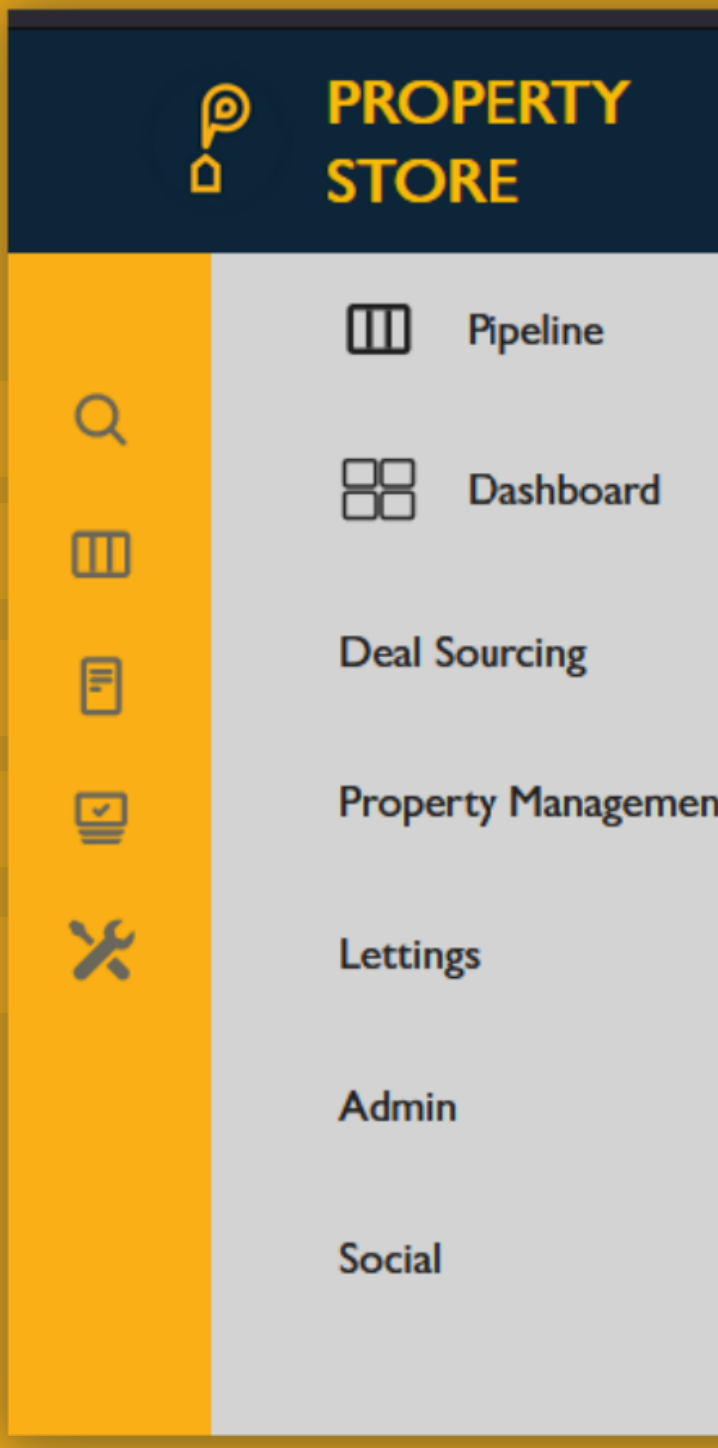
SEARCH PROPERTIES

ADD PROPERTY

CREATE CONTACT

CREATE TASKS

CREATE MAINTENANCE



SEARCH PROPERTY

Simply click the Magnifying Glass Icon and the search function will pop up.

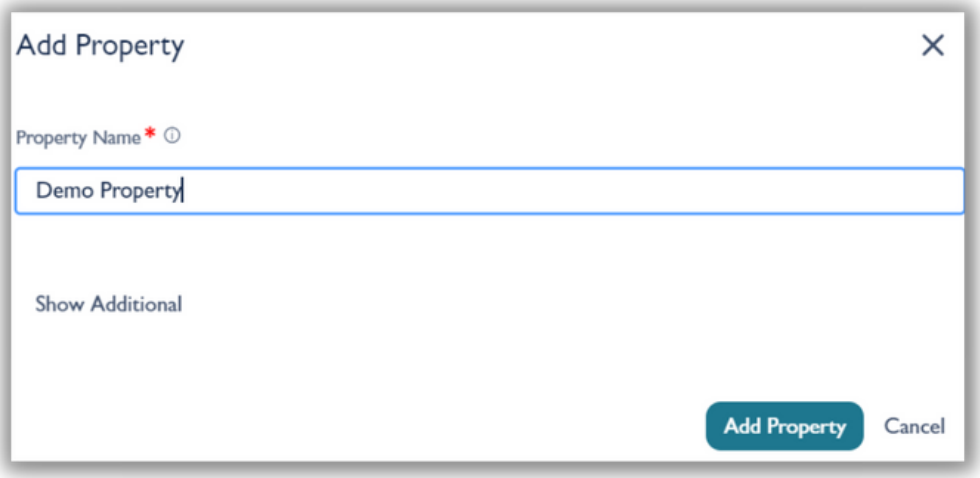
Type in keywords that you are looking for here. Example: You may type in "Chase" to search for "Chase up offer" Tasks.

As shown in the image, this search bar will look for the keyword everywhere such as properties, tasks, contacts, etc.

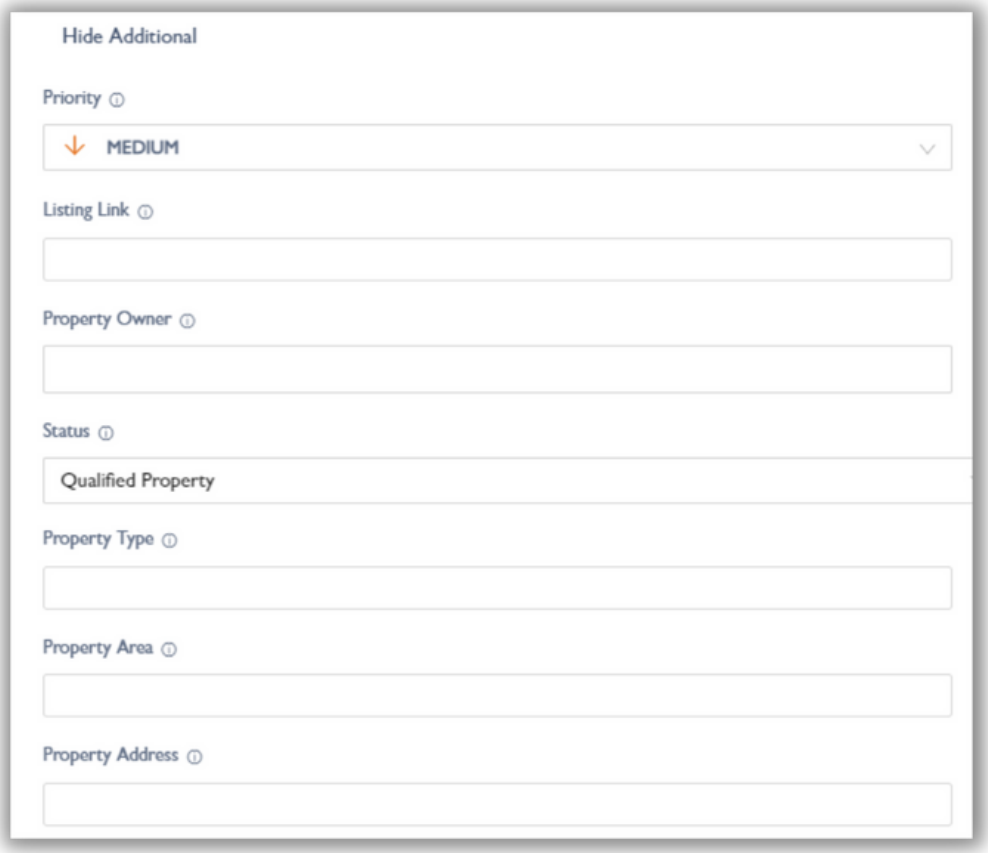
Other Examples: You can type in "carpet" to search for projects or activities involving ripping out carpets (if you have added it before).

ADD PROPERTY

Clicking the PROPERTY icon will show the ADD PROPERTY form below:



Clicking "Show Additional" will reveal a lengthy form to complete your property details. A small portion of that form is shown below:



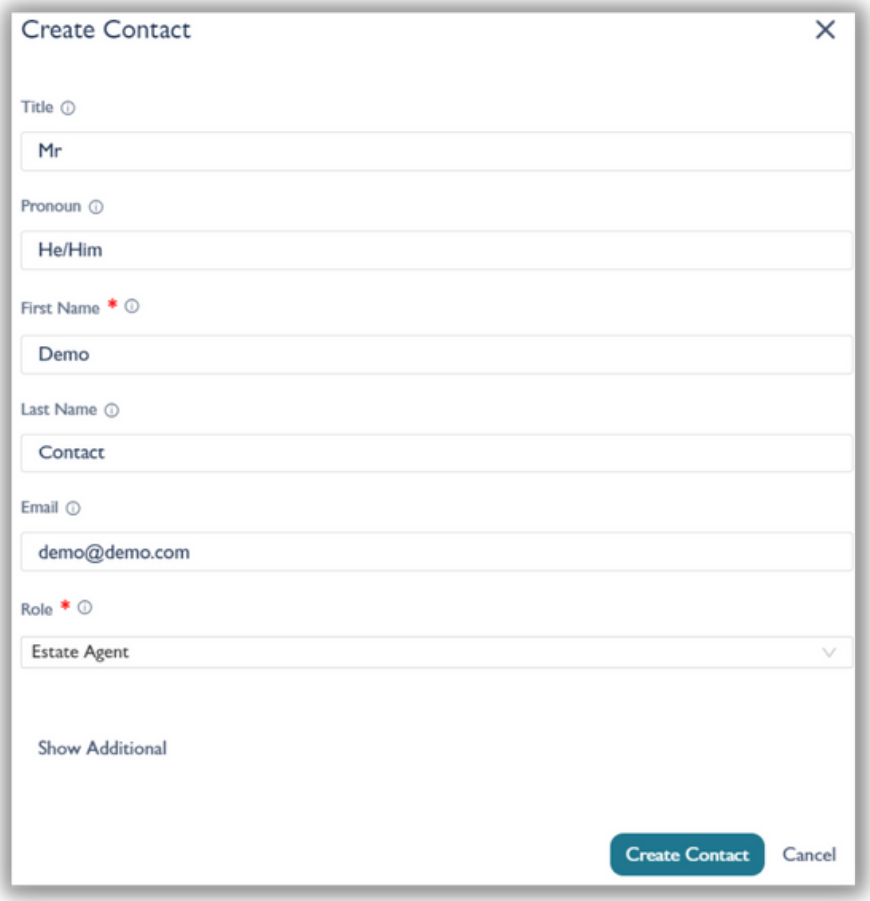
You may fill these up now or you may choose to add the property now via the "Add Property" button and fill in the details later. Newly added property will show up on the first stage of your PIPELINE.

CREATE CONTACT

Clicking the CONTACT icon will show the CREATE CONTACT form:

Custom pronouns can be added by choosing "Other" on the Pronoun Field.

Additional options may pop up for specific roles such as contractors.



Similar to the "ADD PROPERTY" form, clicking "Show Additional" will reveal other details to be filled if needed.

Clicking the "Create Contact" button will add the details to your list, which can be found on the CONTACT overview as shown below:

CONTACTS feature is discussed in full on the GRAY SIDEBAR section.

CREATE TASK

Set to receive an email reminder.

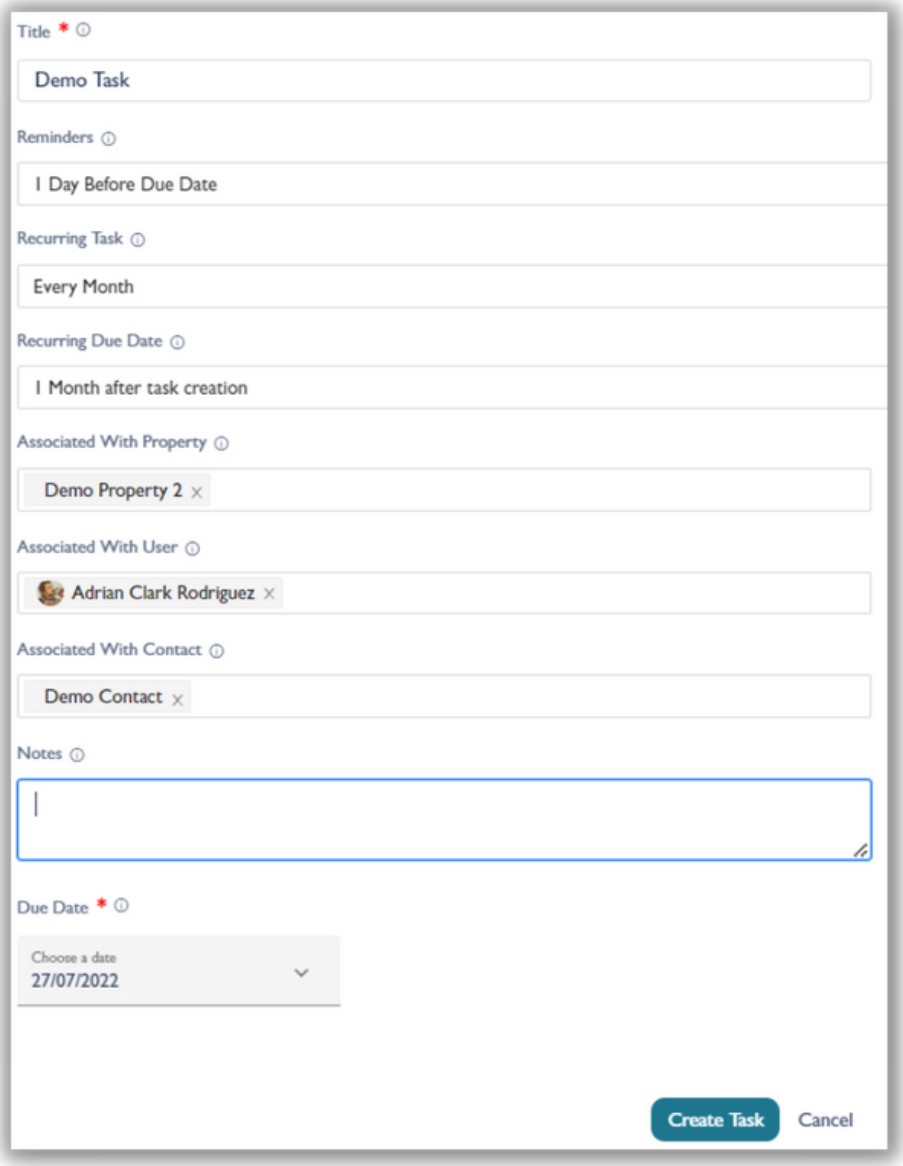
Removes the need to set it again.

Set to receive recurring email reminders

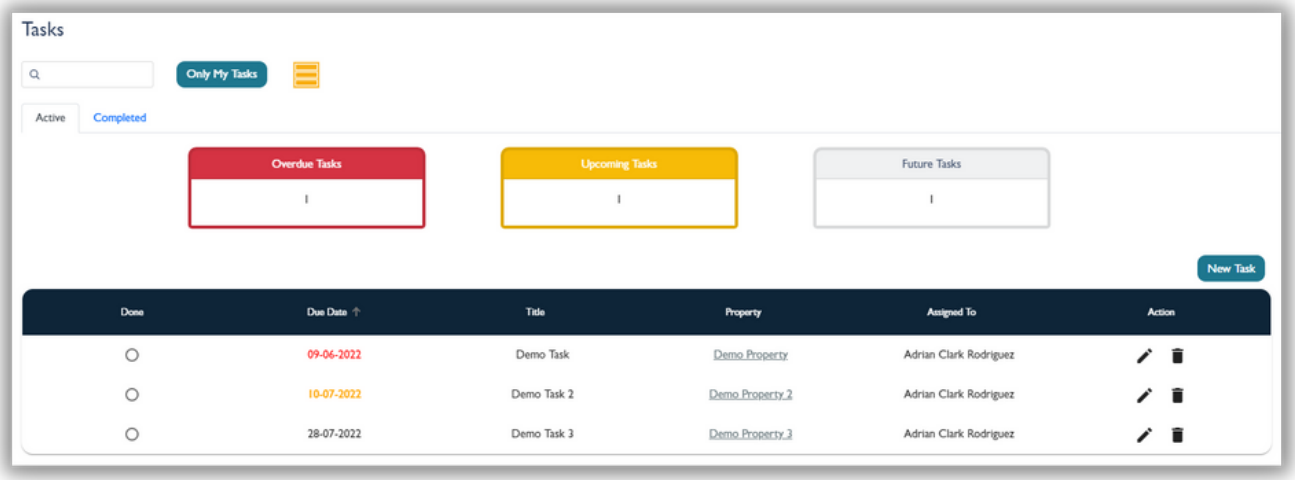
Set so that TASK will show up on the property details.

Account with multiple users can assign the TASK to a person

Set to easily remember your client for this TASK



TASKS will be discussed in full on the GRAY SIDEBAR Section.



CREATE MAINTENANCE

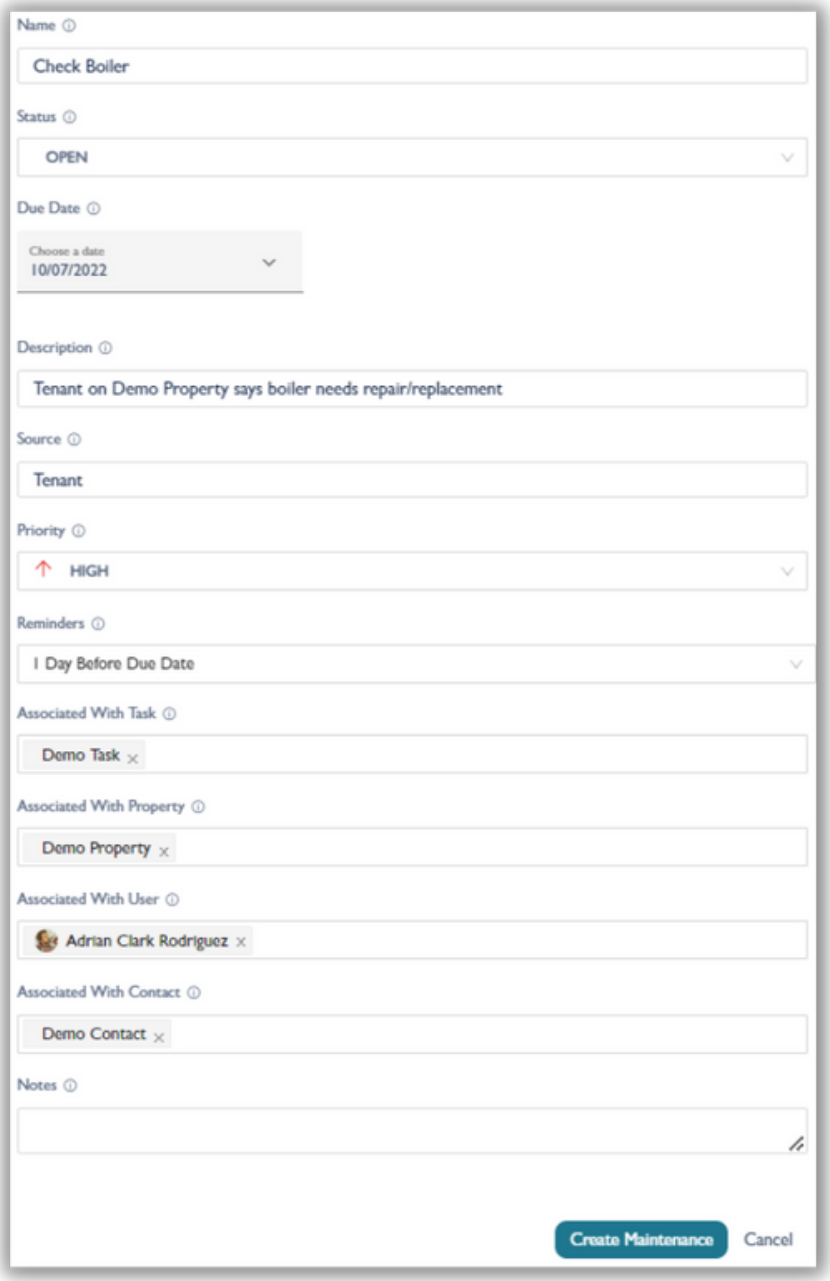
Set STATUS to open to receive reminders and notifications.

Set to easily remember who raised the ticket.

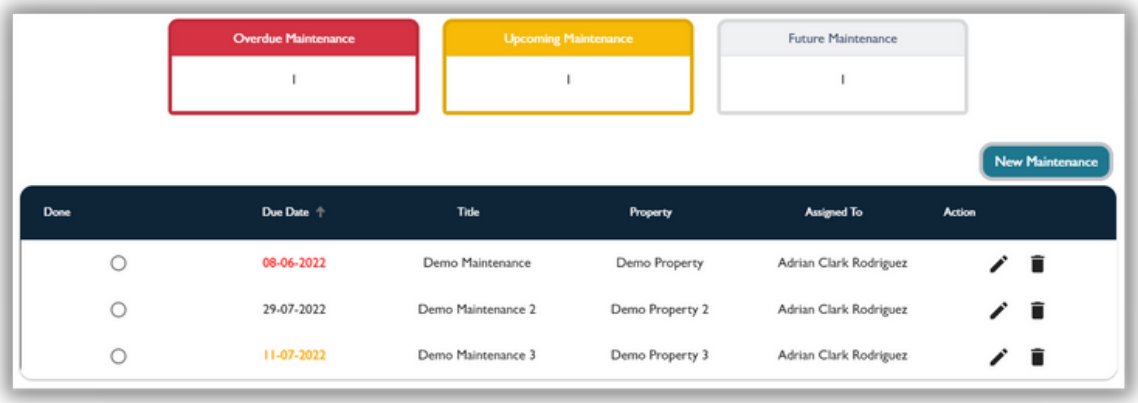
If set, you will receive an email regarding this task.

If set, maintenance ticket will show up on the property details.

Set to easily remember your client for this ticket.

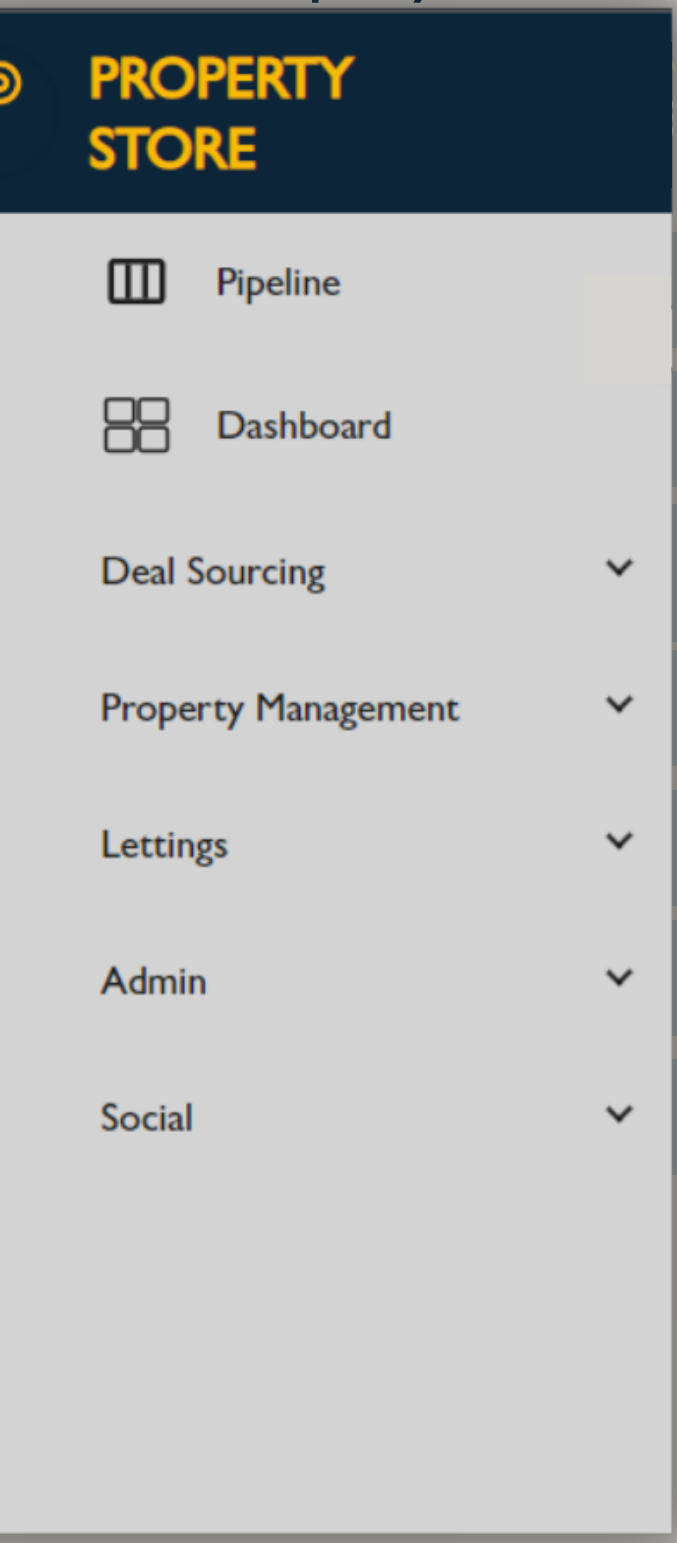


MAINTENANCE will be discussed in full on the GRAY SIDEBAR Section.



GRAY SIDEBAR

The Gray Sidebar is used to access all the features of Property Store.



Returns you to your PIPELINE or the landing page upon logging in.

Shows you an overview of your Finances, Calendar, Task, and Tickets.

Gives access to the PROPERTY VIEWING MANAGER and the INVESTMENT CALCULATOR feature.

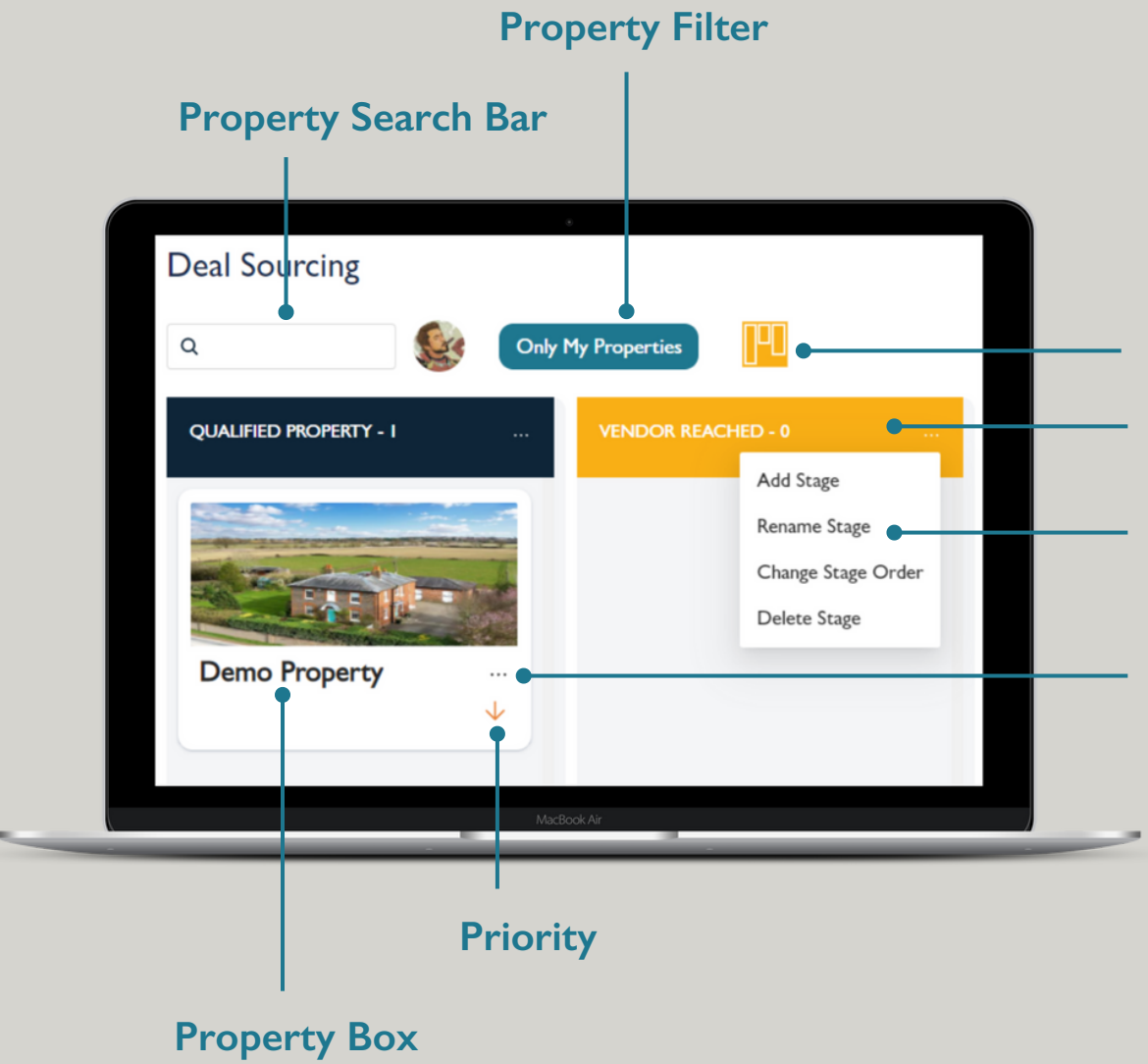
Gives access to property handling features.

Tenancy tracking is located here.

Clerical functions are assembled here.

Networking environment of Property Store.

PIPELINE



Property Filter

Filters property in which you set yourself as the "Property Owner".

View Selector

Allows you to alternate between Kanban View and List View.

Property Search Bar

Can be used to search for specific properties using keywords.

Pipeline Stages

Allows you to easily track where your properties are in the investment pipeline.

Pipeline Stage Editor

Allows you to personalize your pipeline to fit your needs.

Property Box

The properties that you have added will be shown here.

Property Cover Image

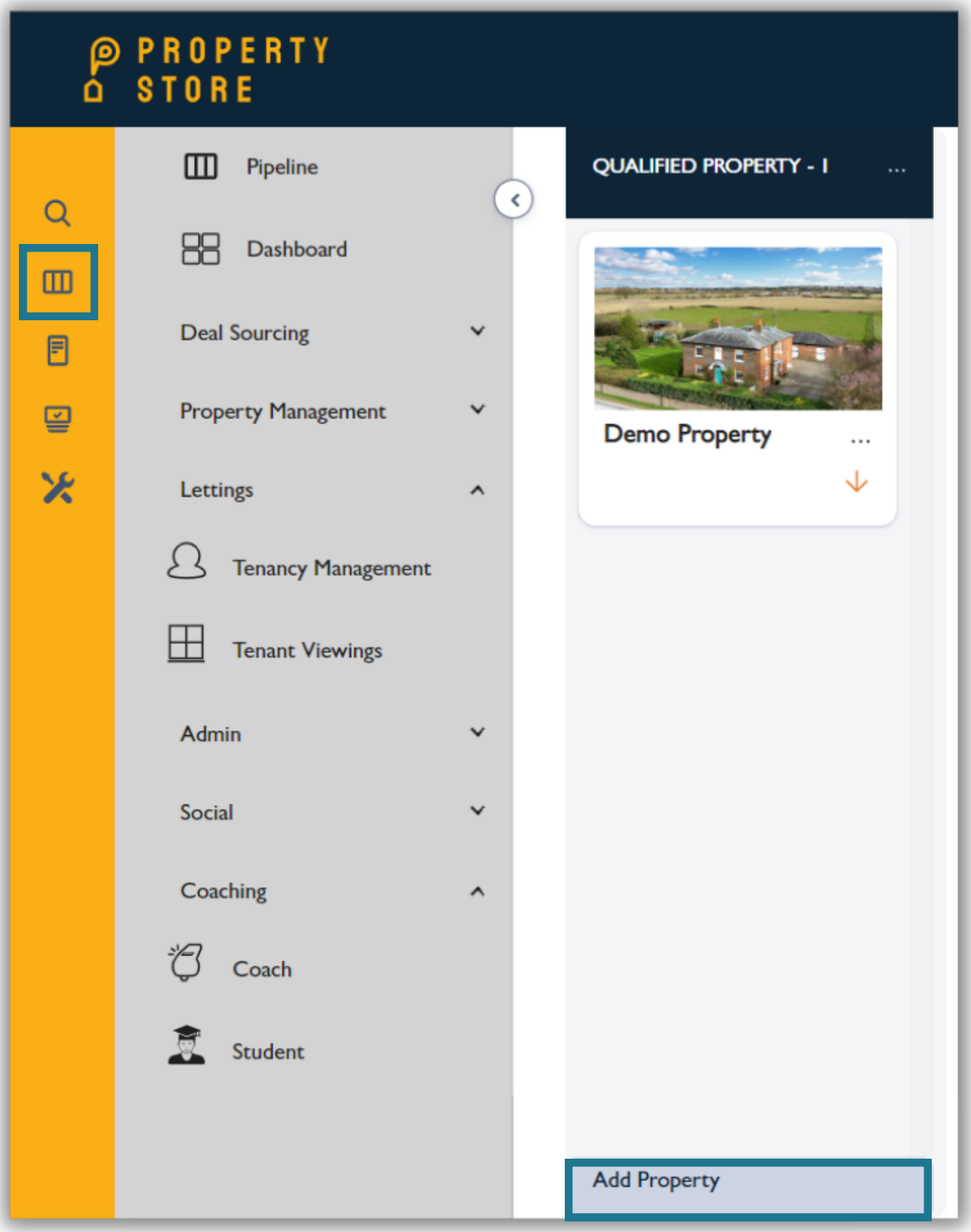
Images can be added using the three dots to help you easily distinguish properties.

Priority

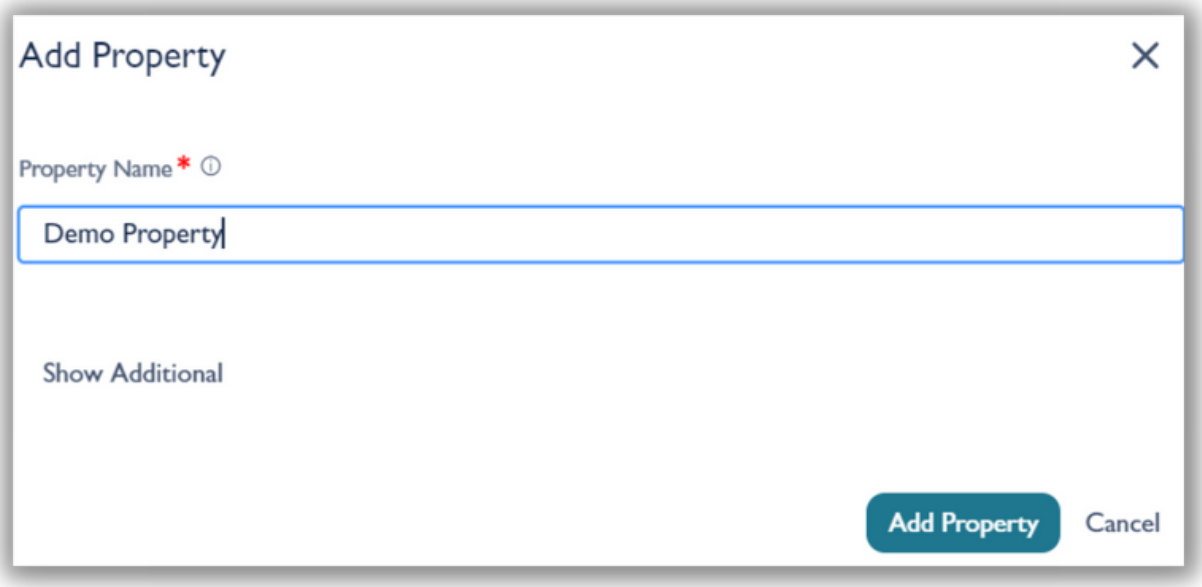
Shows the priority level that you set for the property. Default priority is Medium.

ADD PROPERTY

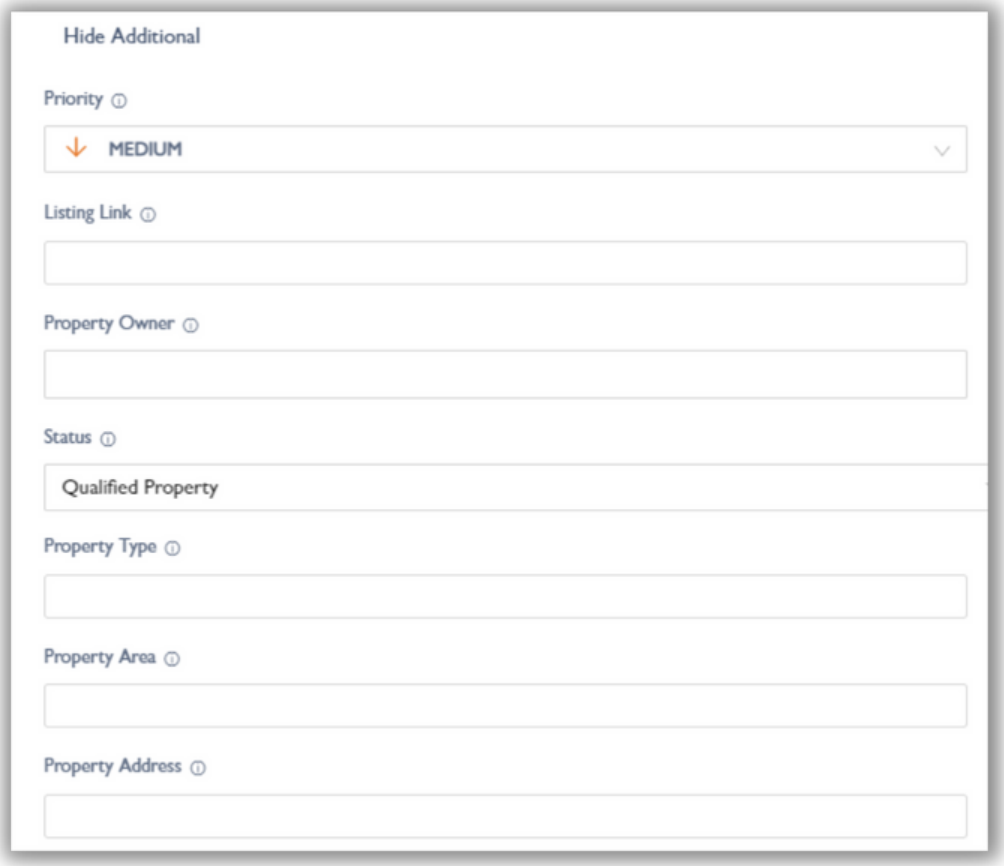
1. Click the Property Icon or "Add Property" button.



2. Fill in the details of your Property.

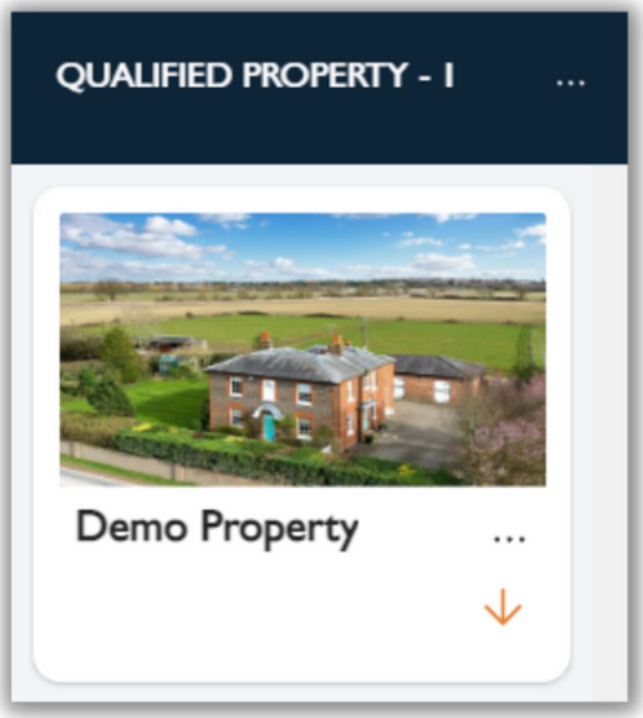


Clicking "Show Additional" will reveal more detail boxes to complete your property details. A small portion of that form is shown below:

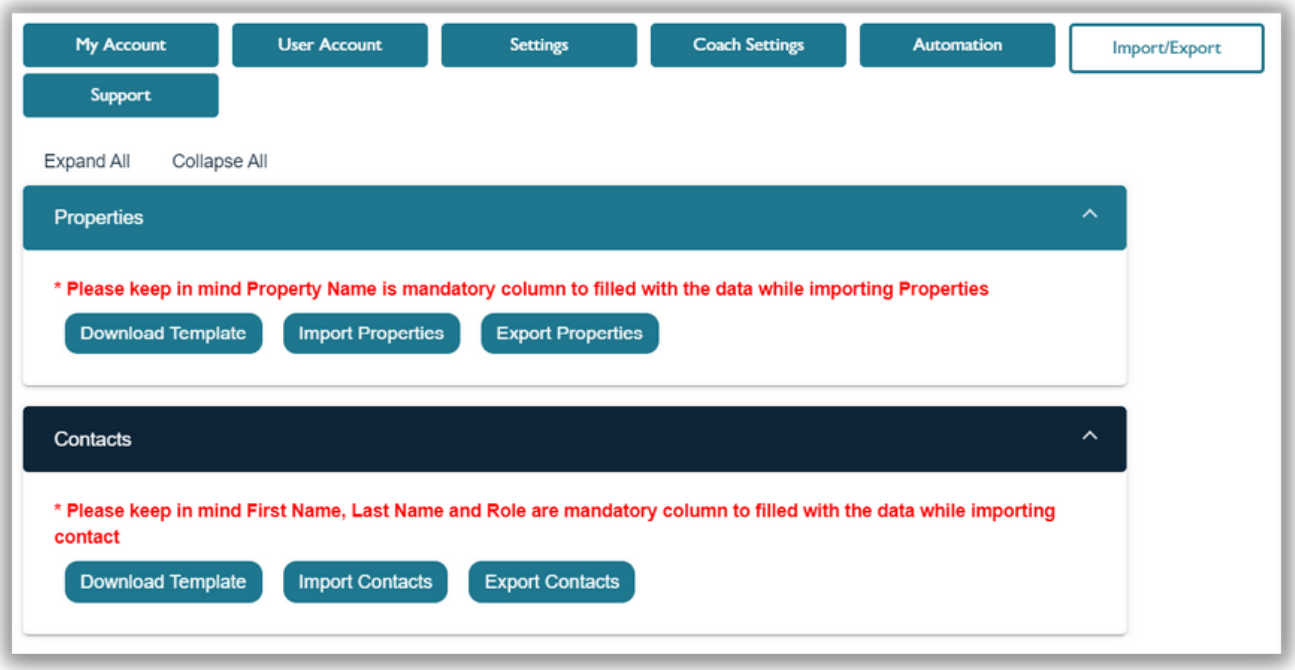


You may fill these up now or you may choose to add the property now via the "Add Property" button and fill in the details later as needed. Newly added property will show up on the first stage of your PIPELINE.

Your newly added property will always show up the first stage of your PIPELINE. Here we have "QUALIFIED PROPERTY" as the first stage.

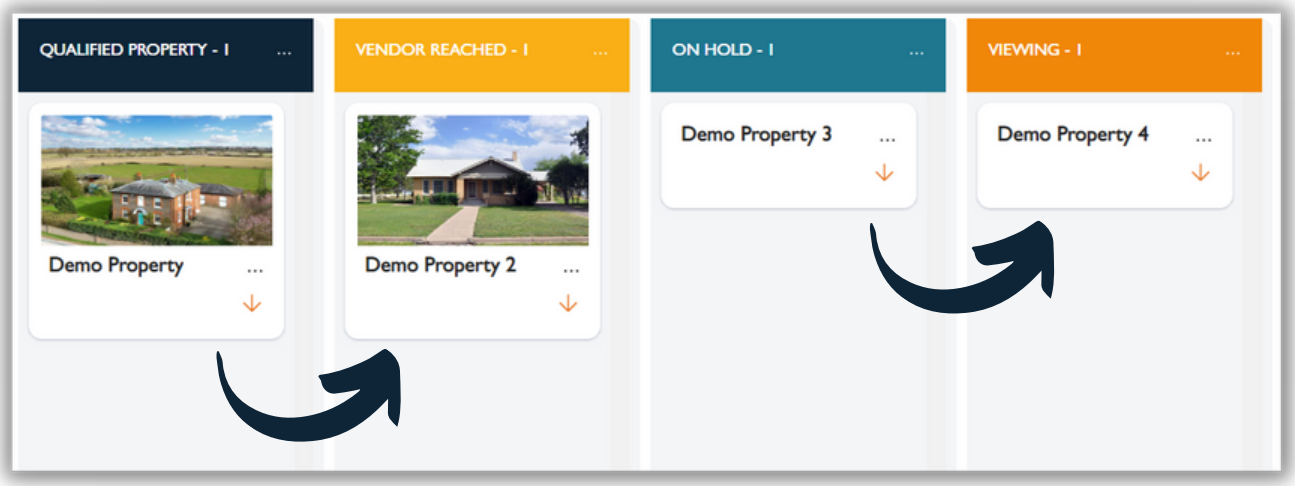


You can also import a large number of properties by downloading the template. The template is a pre-formatted spreadsheet which you can fill in with the details of your portfolio and then upload to Property Store. The template can be found on the IMPORT/EXPORT of PIPELINE ADMIN.



STAGES

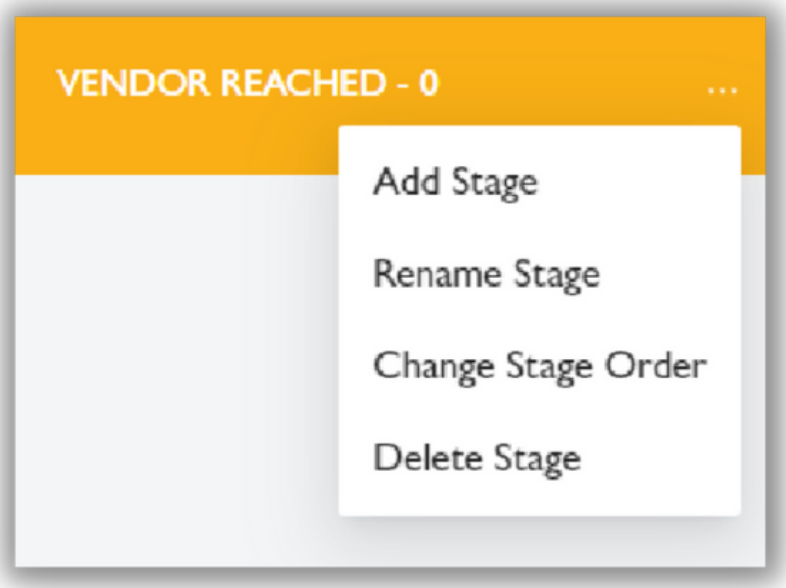
1. Drag and drop properties between stages.



Hover your cursor to any property then click and hold to transfer the property from one stage to another.

2. Modify Stages

You can modify stages by clicking the three small dots beside the name of each stages.

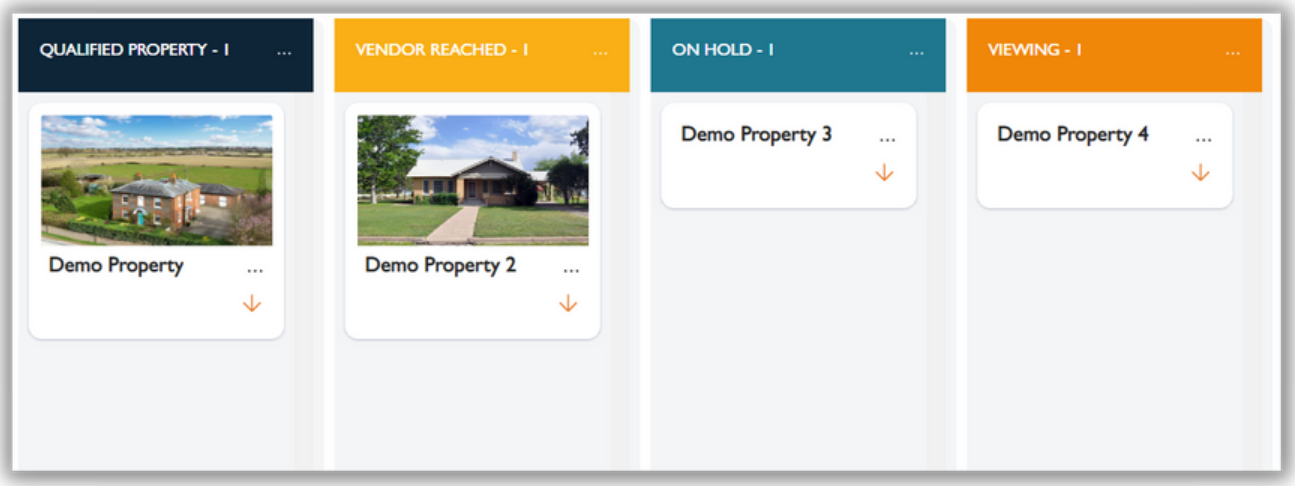


LIST VS KANBAN

The default is KANBAN VIEW but you can always switch to LIST VIEW.

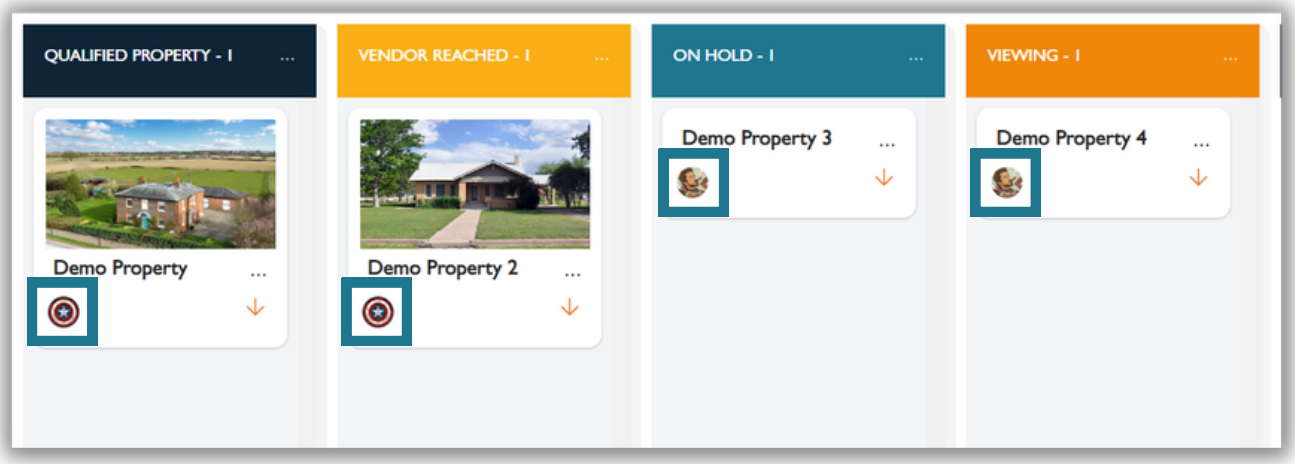
LIST VIEW

KANBAN VIEW

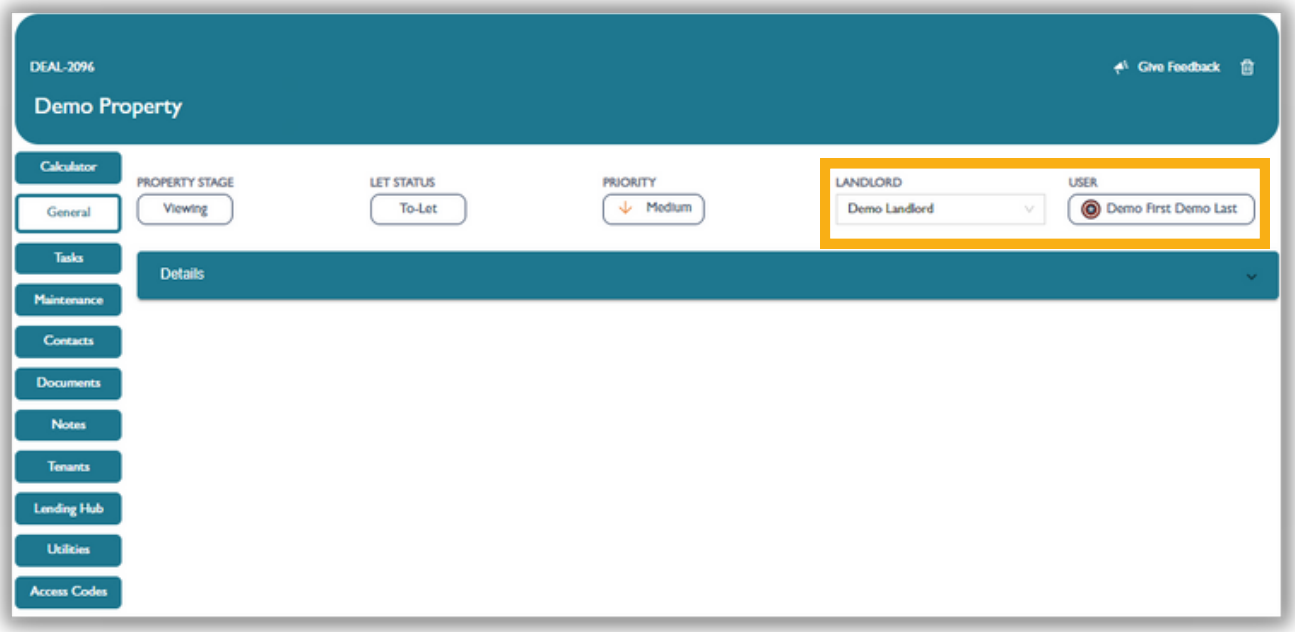


OWNED PROPERTY

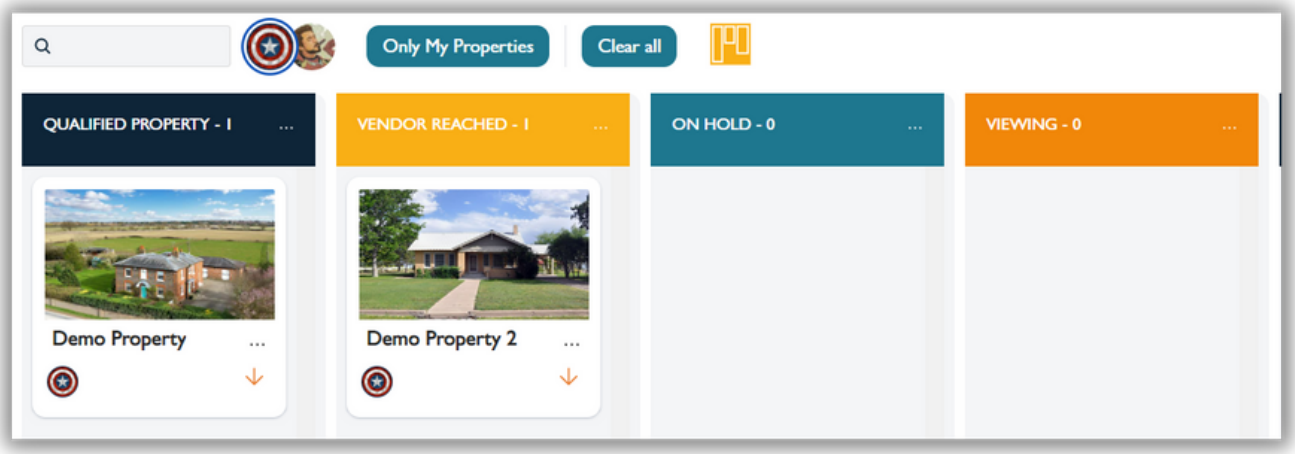
1. Assign Property to User and Landlord for tracking.



Click the property to see its details and find the "LANDLORD" and "USER" field. Clicking on it will allow you to choose from the registered users.

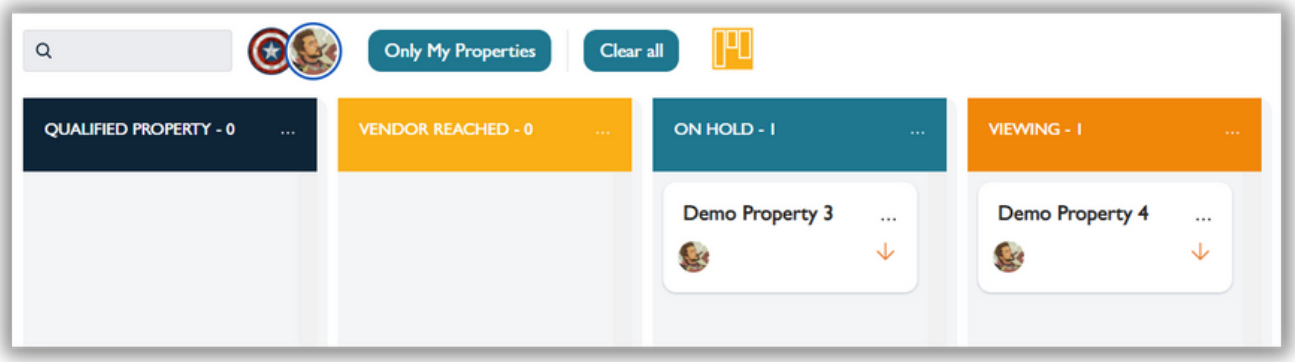


2. Sort properties by owner.



As you can see from the picture above, the shield was highlighted by clicking. With this, only properties assigned to User "Steve Rogers" can be seen on the PIPELINE.

Similarly, we can sort properties assigned to User "Tony Stark" as shown below:

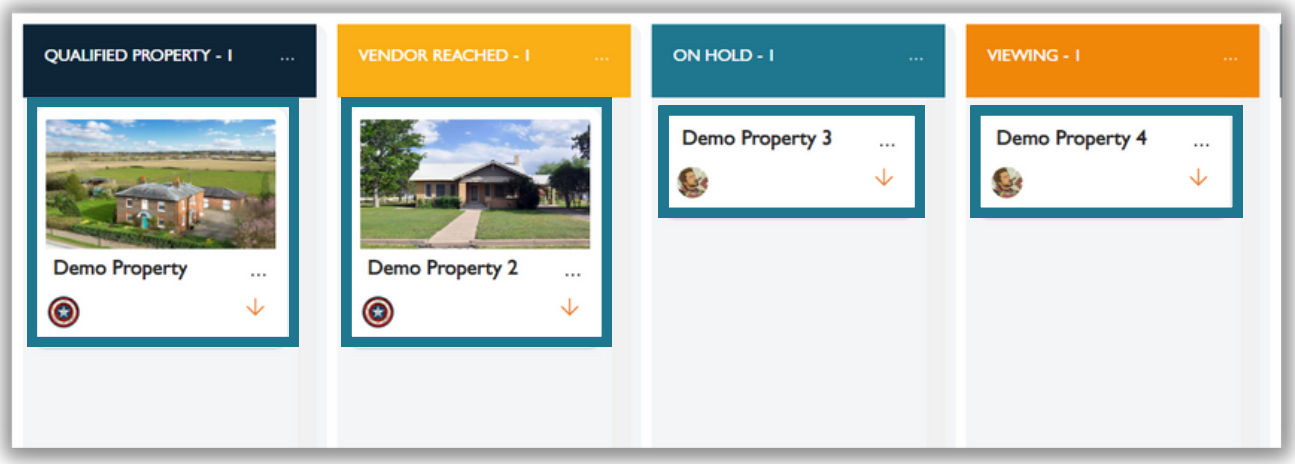


You can use the "Clear all" button to remove the filter. This is important because properties with NO USER will be sorted out.

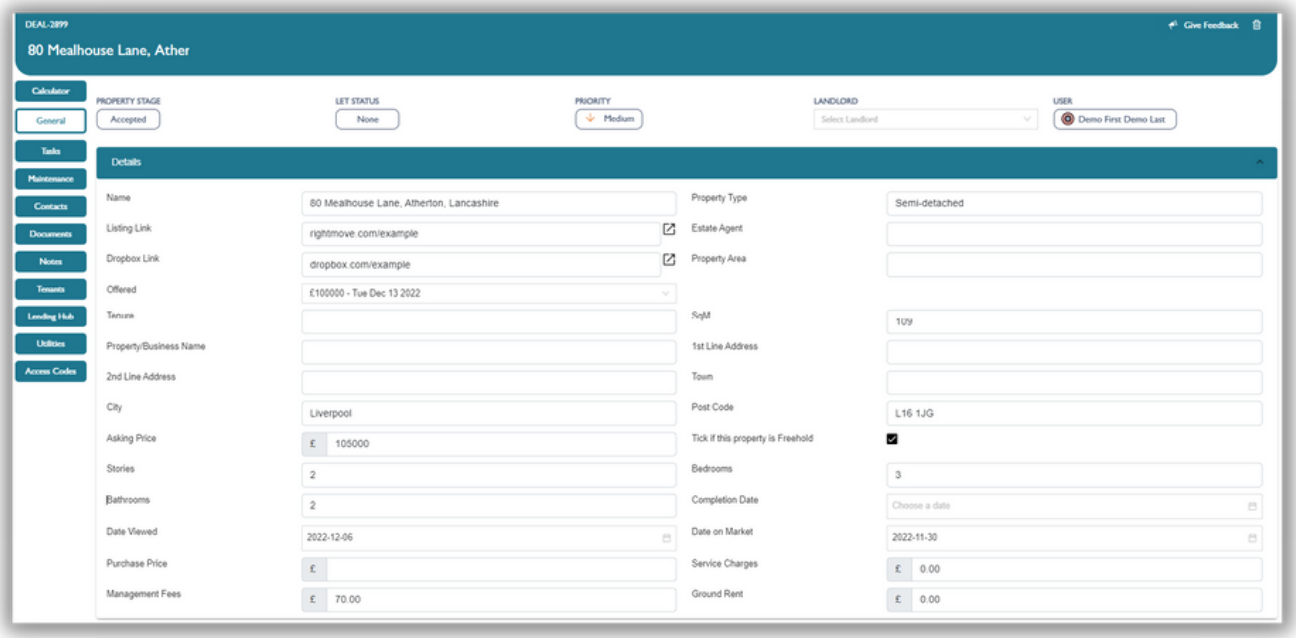
Lastly, instead of clicking on your logo, you can use the "Only My Properties" button to sort properties that were assigned to YOU.

PROPERTY DETAILS

1. Choose the Property you want to view or edit.



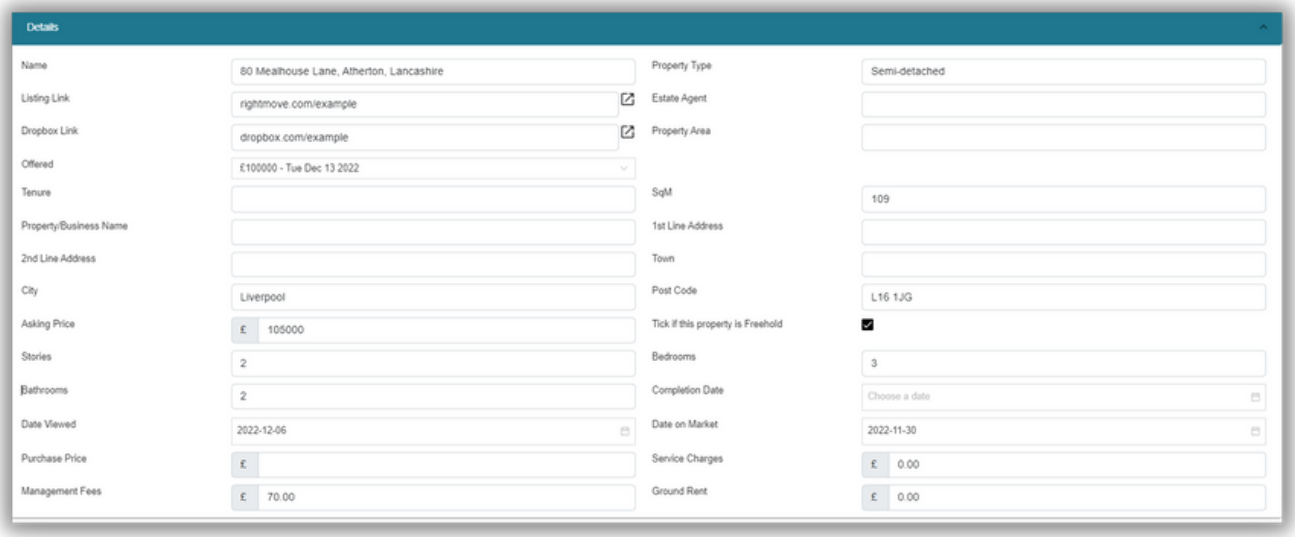
Clicking any Property will open up its details. There are multiple tabs to help you compartmentalize the information for your convenience. For example, the General Tab will contain all the basic information of the property. The Tasks tab will show the tasks that are assigned to the property either manually or through automation.



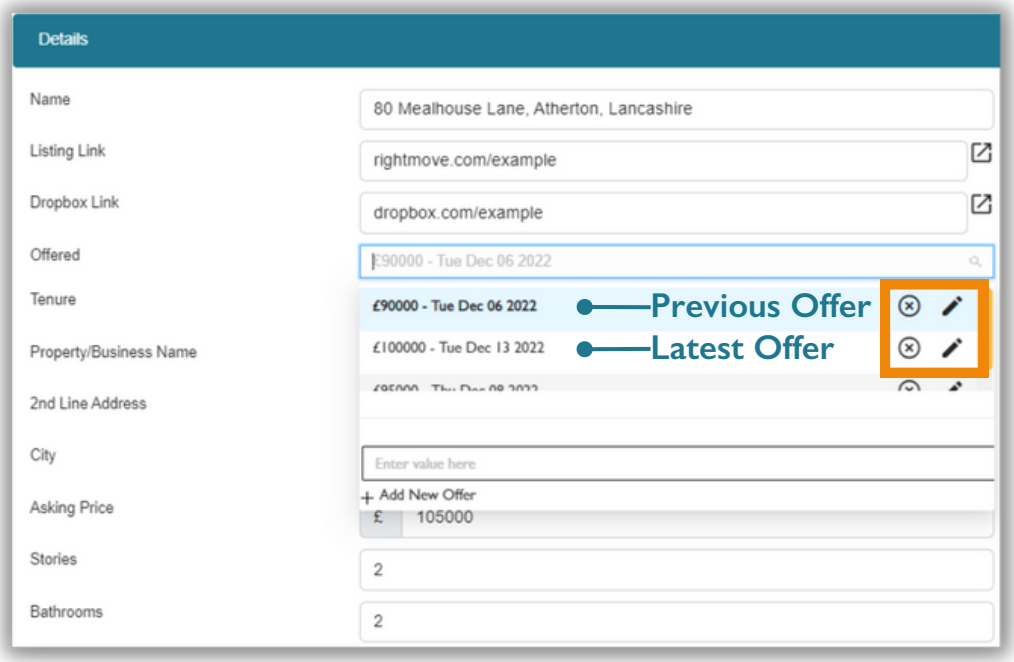
As you can see, there are multiple tabs each with their own data and purpose. These will all be discussed in this manual.

2. Choose the tab that you want to edit.

For now, let's focus on the General Tab:



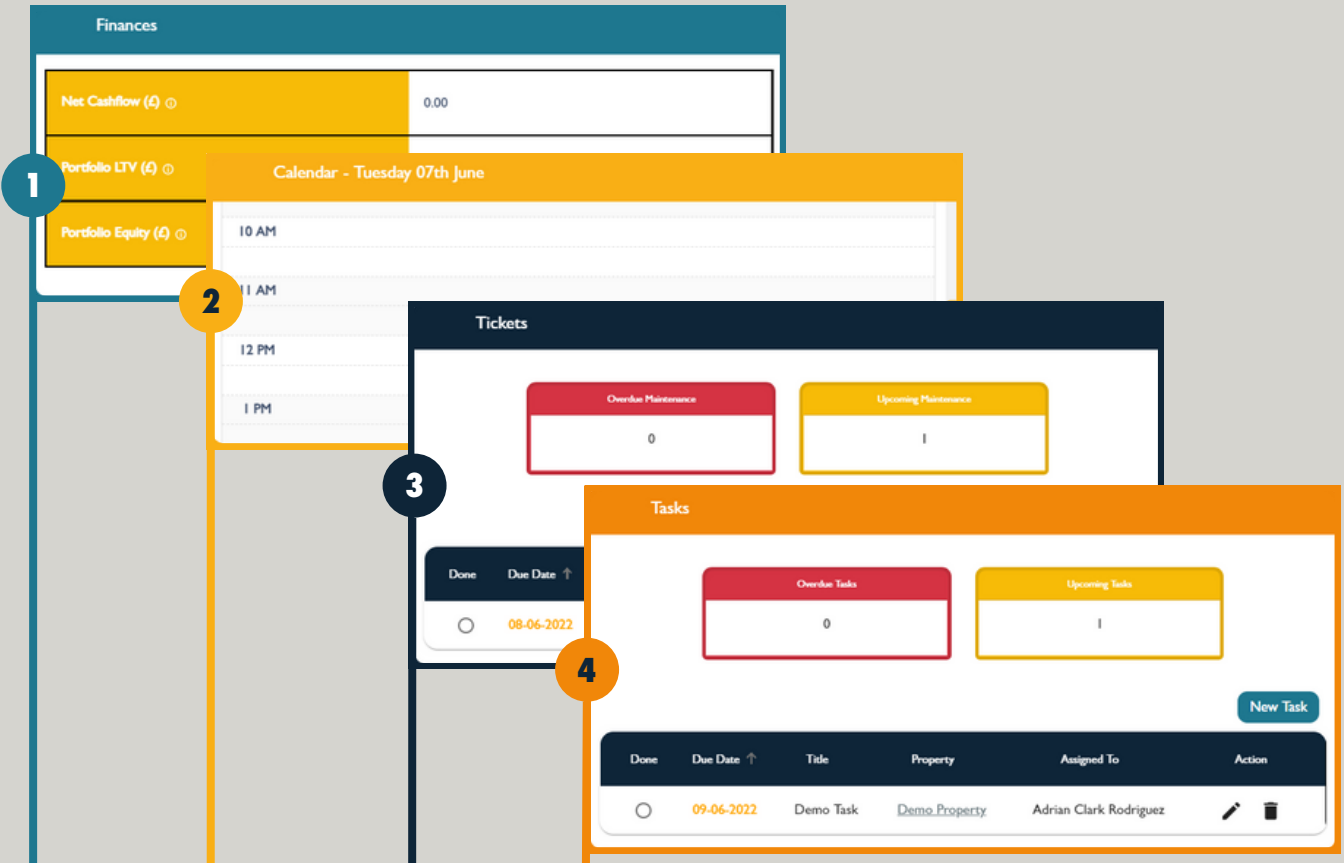
The General Tab contains fields for all the information you will ever need for your property. In addition, Property Store also has a function to save all your offers so you can view them when needed as shown below:



The icons highlighted are the Pencil Icon and the Delete Icon. You can use these icons to edit your offers (including the date) or delete them.

For some of the fields, you can type in links. Clicking the "Go To Link" icon beside these fields will open the link it contains on a new tab.

DASHBOARD



Task Overview

Shows all tasks. Can close, delete, edit, and add tasks here.

Maintenance Overview

Compilation of maintenance tickets. Close, delete, edit, and add tickets.

Calendar Overview

Provides a compact Day View of the Calendar on date today.

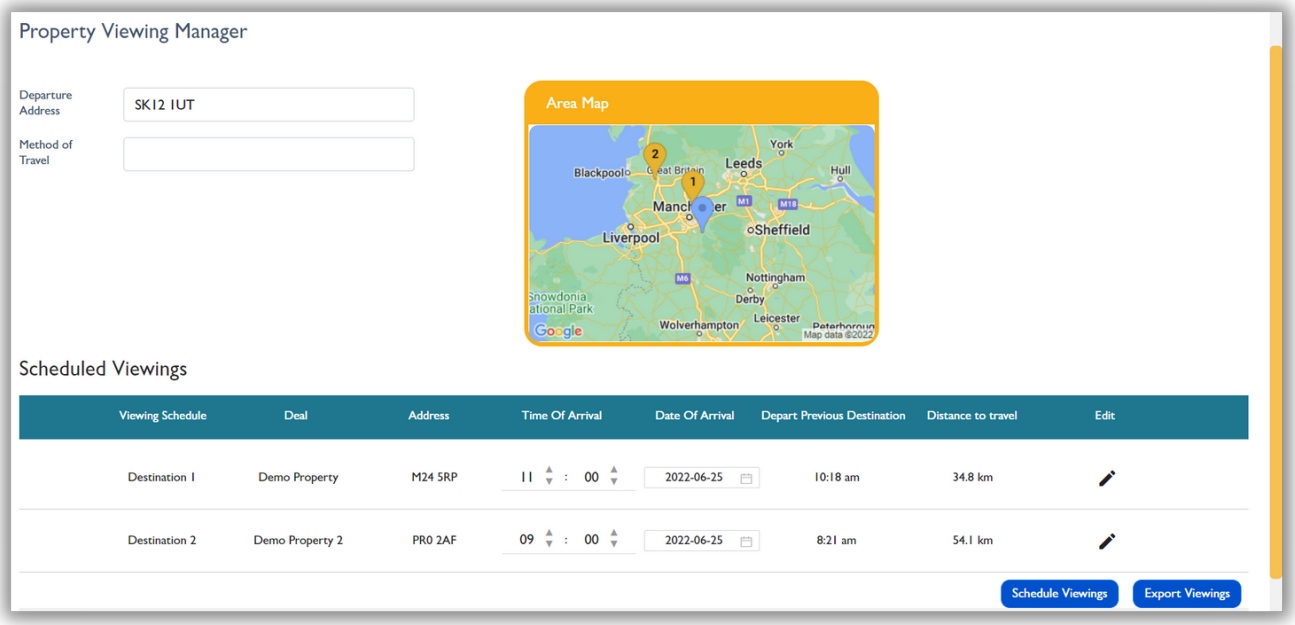
Finance Overview

Provides a summary of your finances such as net cashflow PCM and total portfolio value.

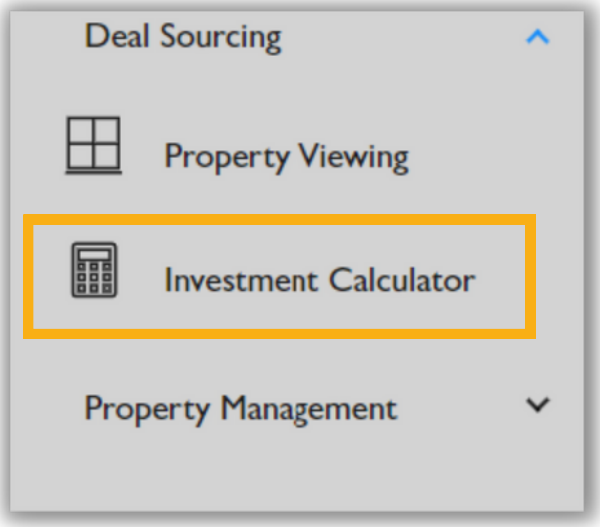
The DASHBOARD feature is used to be able to show you the important features in one screen. All of these features will be tackled later on in this manual.

PROPERTY VIEWING MANAGER

There are two types of viewing manager in Property Store. The first one is the PROPERTY VIEWING MANAGER. This feature is to help you remove the headache of managing your viewing appointments.

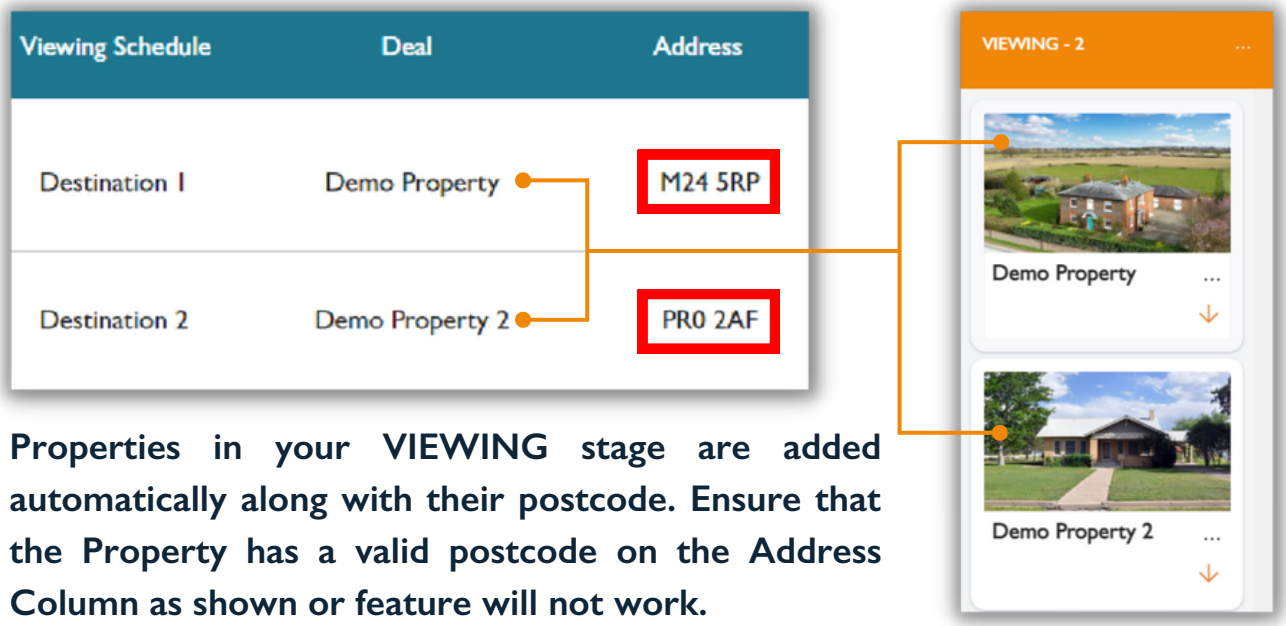


The PROPERTY VIEWING MANAGER can be found on the GRAY SIDEBAR under DEAL SOURCING.



VIEWING PROPERTIES

1. Add properties to the Viewing Stage of your PIPELINE

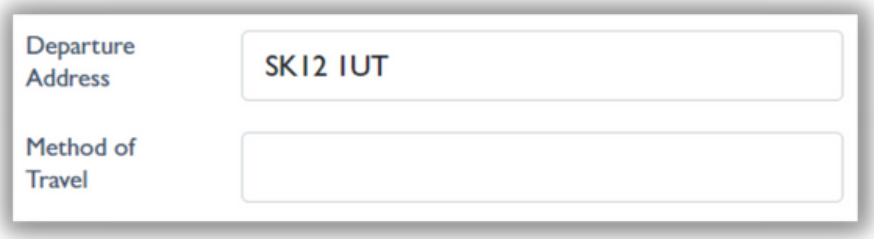


Properties in your VIEWING stage are added automatically along with their postcode. Ensure that the Property has a valid postcode on the Address Column as shown or feature will not work.

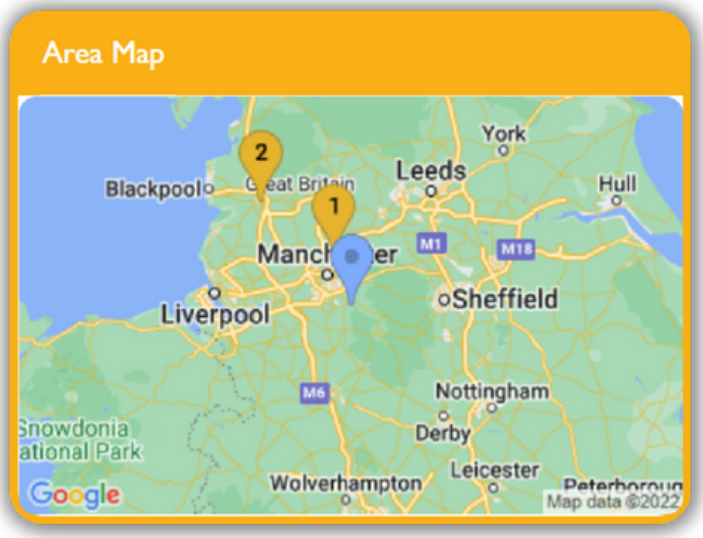
2. Set your Departure Address and Method of Travel.

PIPELINE Default or type in a postcode.

Set to calculate time required to travel.



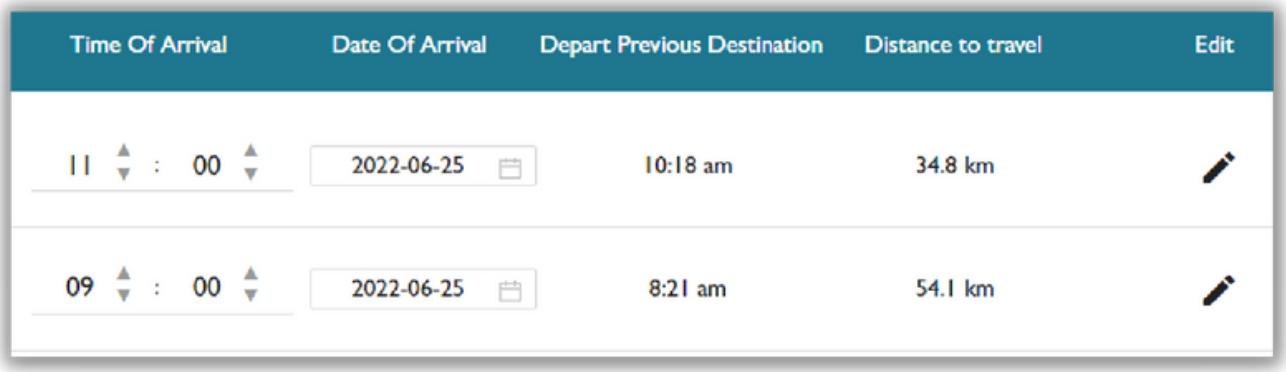
Initial location and Destination will appear on the Area Map.



Initial Location Marker

N Destination Marker/s

3. Fill in the time and date of your appointment.



Property Store will automatically calculate the travel distance and the estimated time to leave your previous destination in order to reach your next appointment on time.

4. Finish by clicking the "Schedule Viewings" button.

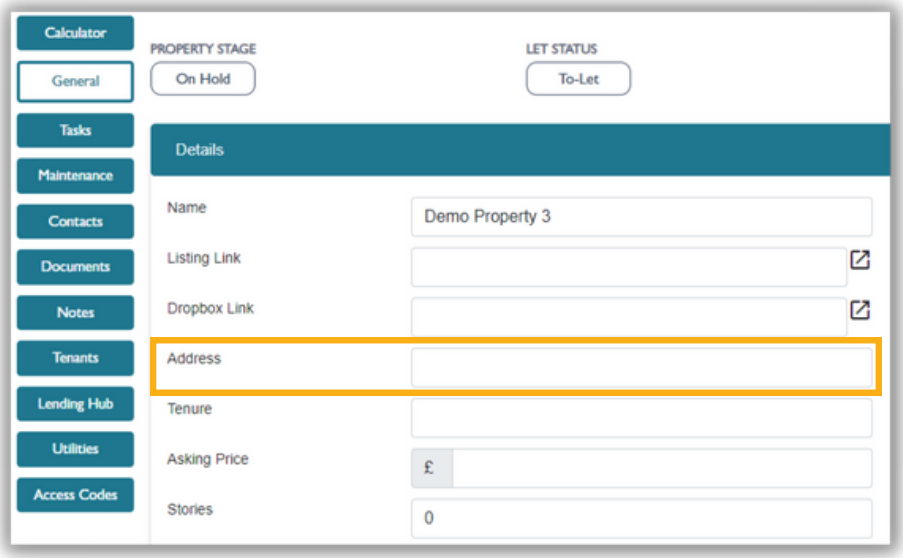
Schedule Viewings

Once departure address, and appointment date and time are set, click this button to show the recommended time of departure.

Export Viewings

Clicking this button will allow you to download your viewing schedule and open it in any worksheet application.

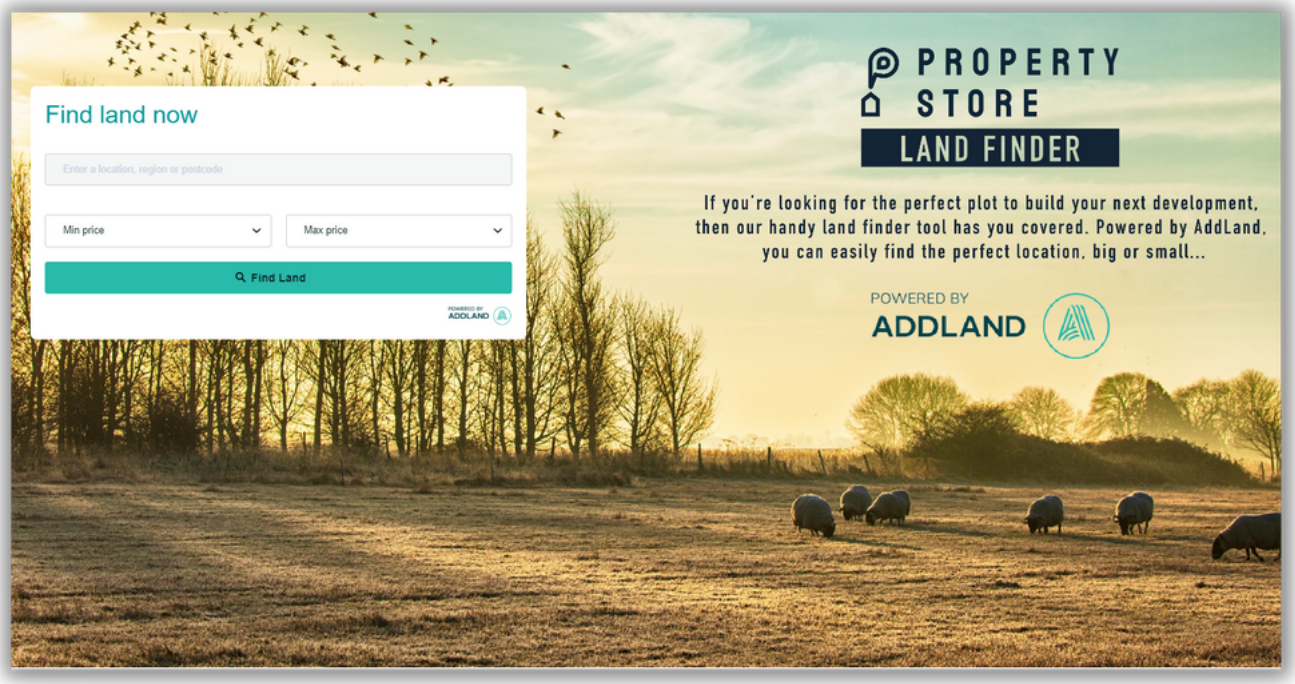
Note: Add/Place/Update Property Postcode

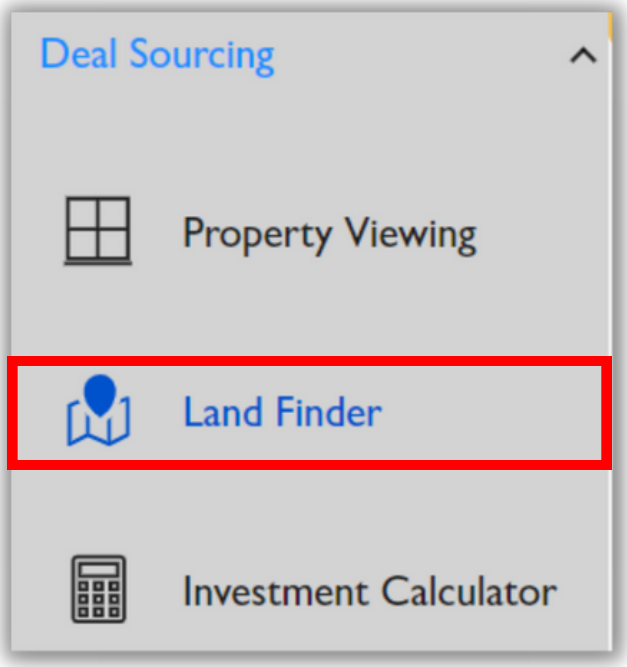


To modify the address of the property, click its Property Box on your PIPELINE and you will be shown the form as shown and fill in the Address Field.

LAND FINDER

Property Store has integrated a Land Finder for your next development. Powered by ADDLAND, you can use this tool to find the perfect plot for your dream home.

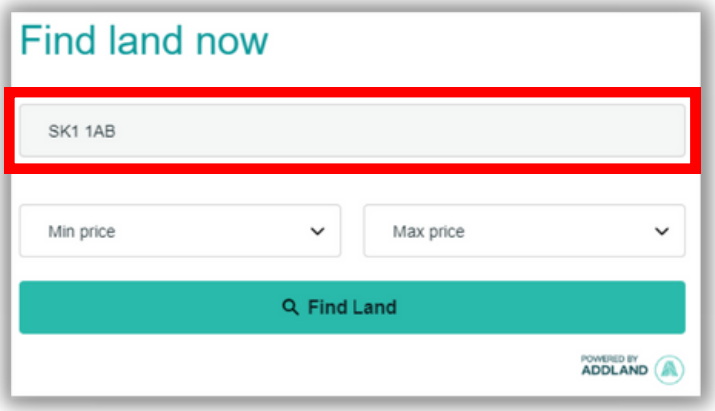




Feature can be found on the GRAY SIDEBAR under DEAL SOURCING.

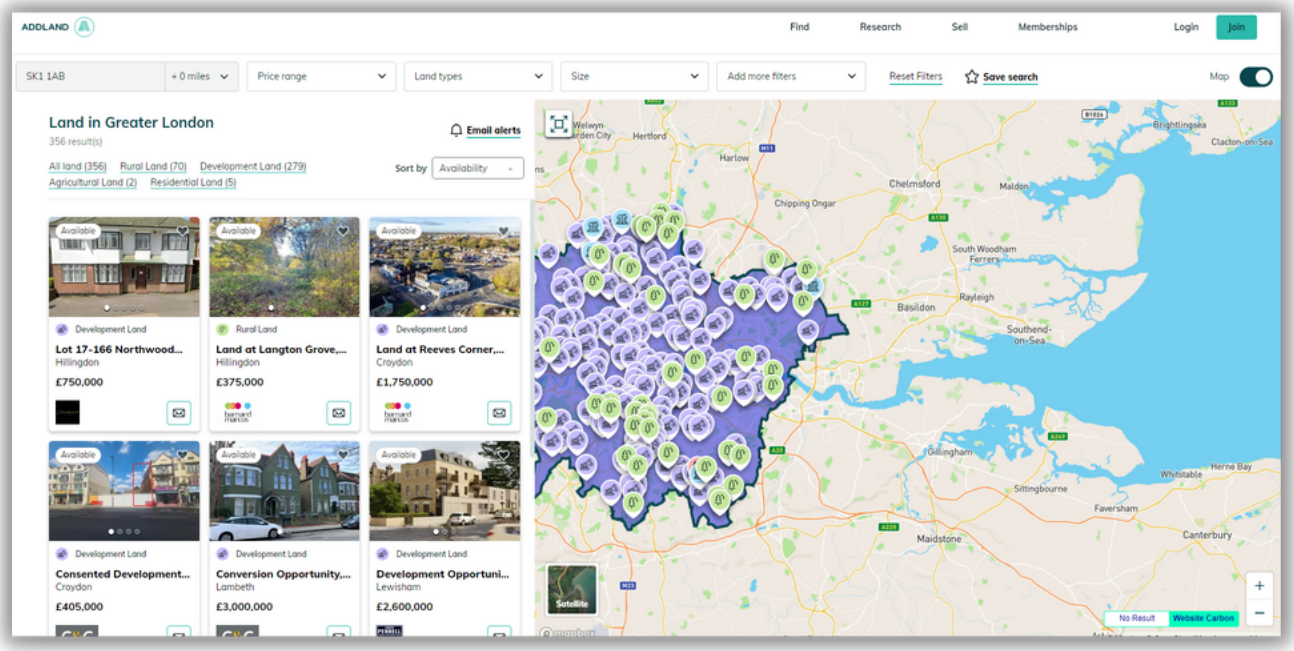
FINDING LAND

1. Enter a Location, Region, or Postcode.



(Optional) You may also select the Minimum Price and Maximum Price that you want from the corresponding dropdown box.

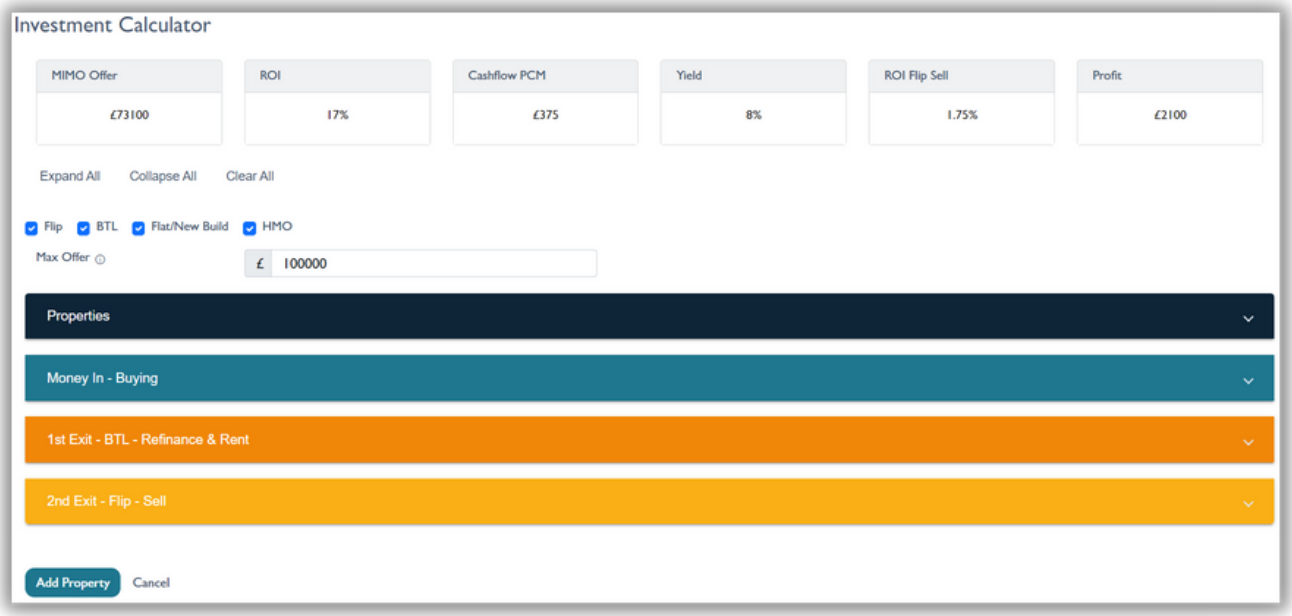
Once satisfied, simply click the Find Land button and a new browser will open leading you to ADDLAND processing your search query.

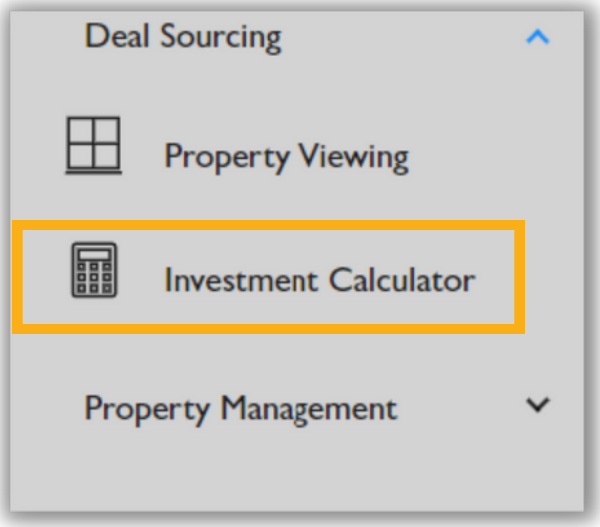


You may continue to browse here for the perfect plot of land.

INVESTMENT CALCULATOR

The INVESTMENT CALCULATOR is arguably the most powerful tool in Property Store. This feature will help you to easily determine if the deal has legs without the hassle of multiple and cluttered spreadsheets.

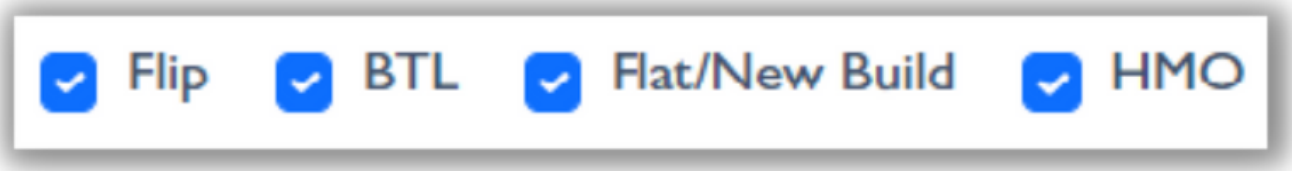




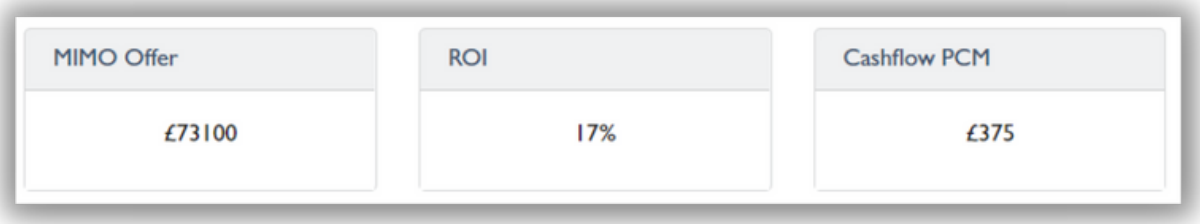
Feature can be found on the GRAY SIDEBAR under DEAL SOURCING.

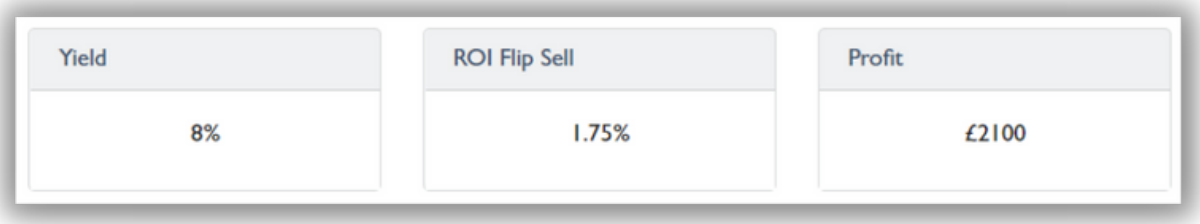
CRUNCHING NUMBERS

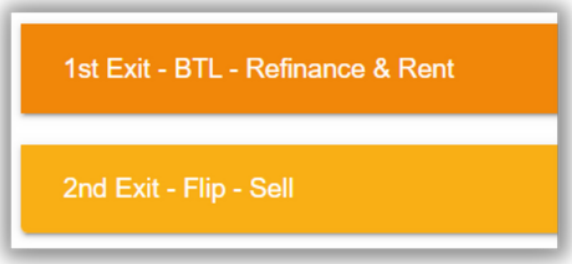
1. Choose your Exit Strategy



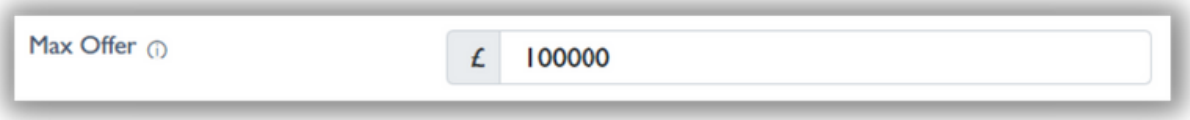
Only the figures and exit forms for the strategy that you choose will show based on chosen strategy. Unticking any strategy will remove forms associated with that exit. This is to make the calculator as clean as possible. Samples of the figures and exits are shown below:







2. Set a ballpark Max Offer.



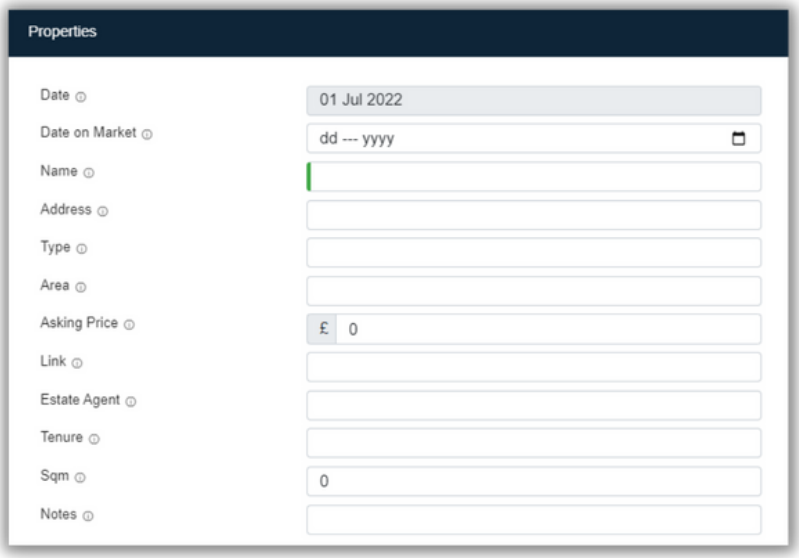
You may type in any number and make adjustments based on the calculated figures such as the Yield and ROI.

3. Fill in the Property Details.

You can fill in as little as you want. The more information you fill in, the more results you will get from the calculator and the CRM. It will also make it easier to search for the details of the property later.

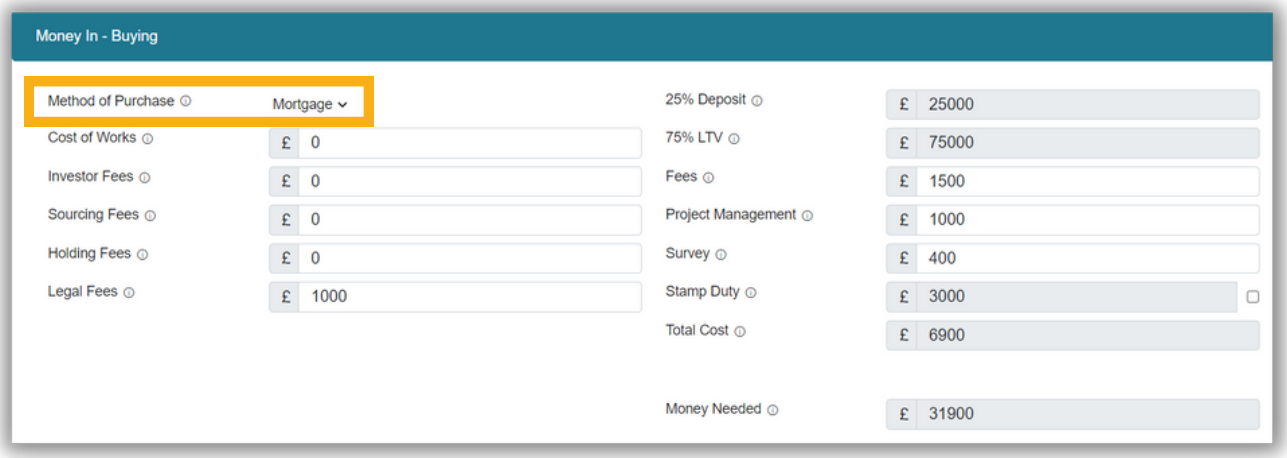
Type in the address for the Property Viewing Manager

Filling in the SQM will allow the calculator to calculate the £/sqm later.



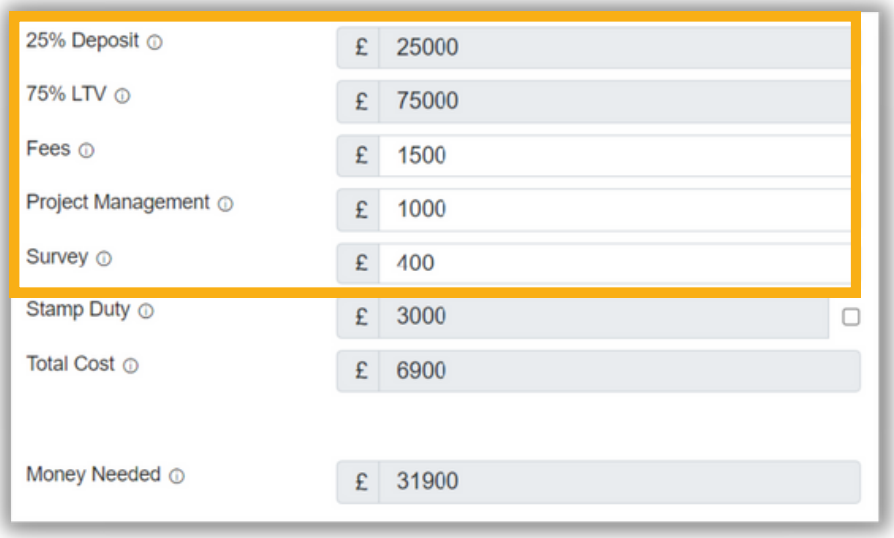
4. Fill in the Money In - Buying Section.

Form may vary depending on your "Method of Purchase" (Cash, Bridge, or Mortgage). The example shown below is for Mortgage:



Legal fees, Project Management, and Survey costs are auto-filled with default values. These can be modified in the PIPELINE ADMIN. This is to streamline the use of the calculator.

Values are based on defaults. Can be changed on PIPELINE ADMIN

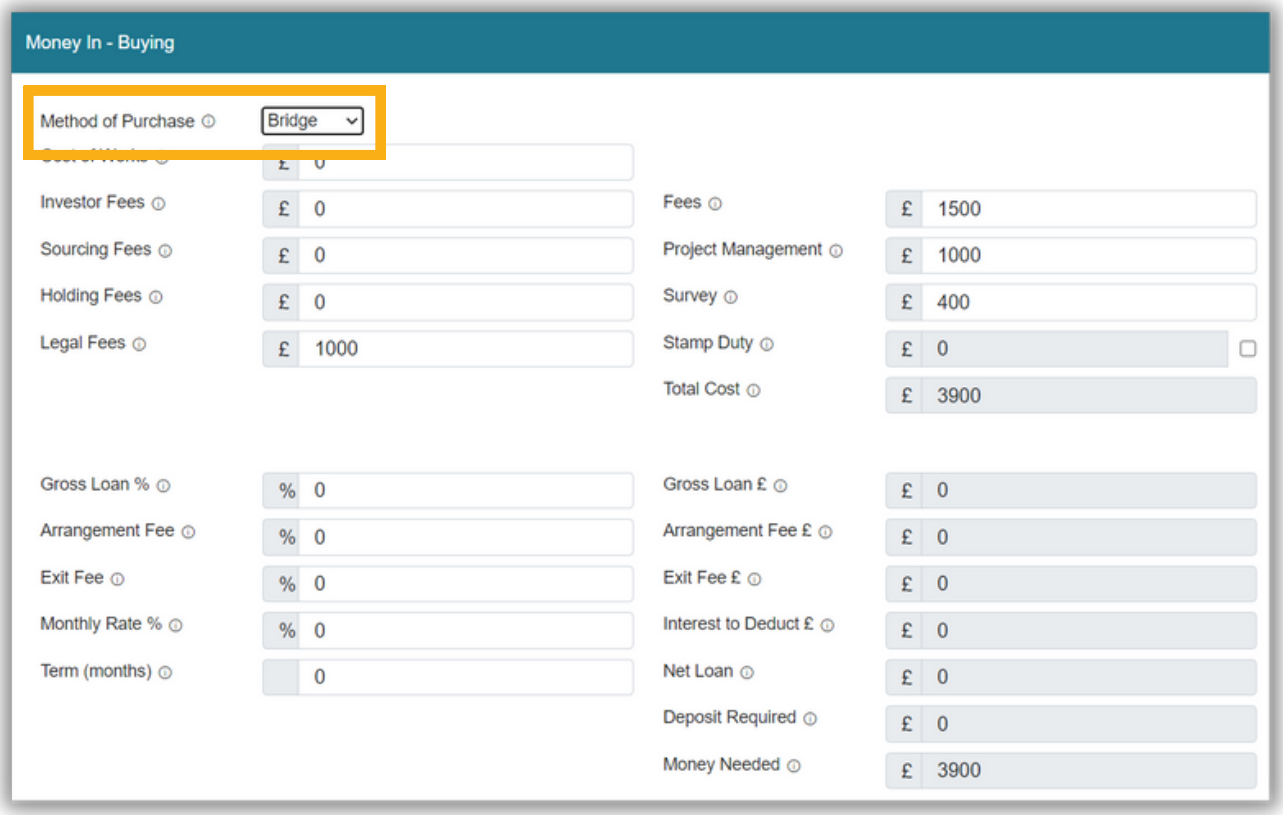


Stamp Duty can be modified if needed such as for uninhabitable homes by ticking the small box at the end of its data field.

Values on the greyed out boxes are automatically calculated based on your PIPELINE ADMIN defaults or derived from the values that you typed in.

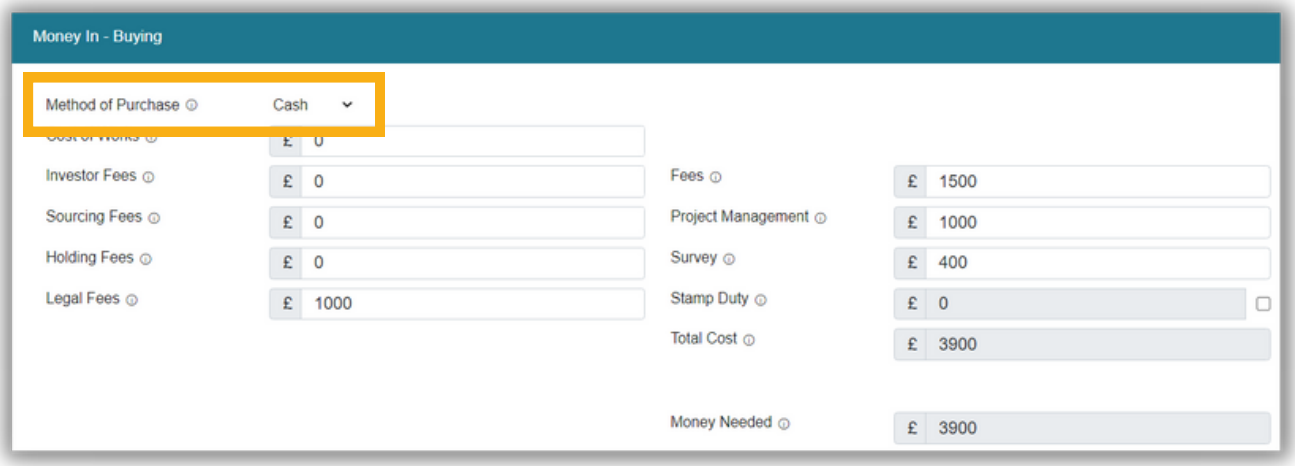
Money In - Buying Section Other Forms.

BRIDGE Form



For the BRIDGE Form, simply add the agreed upon rates for the fees and it will automatically be calculated in the greyed out boxes on the right.

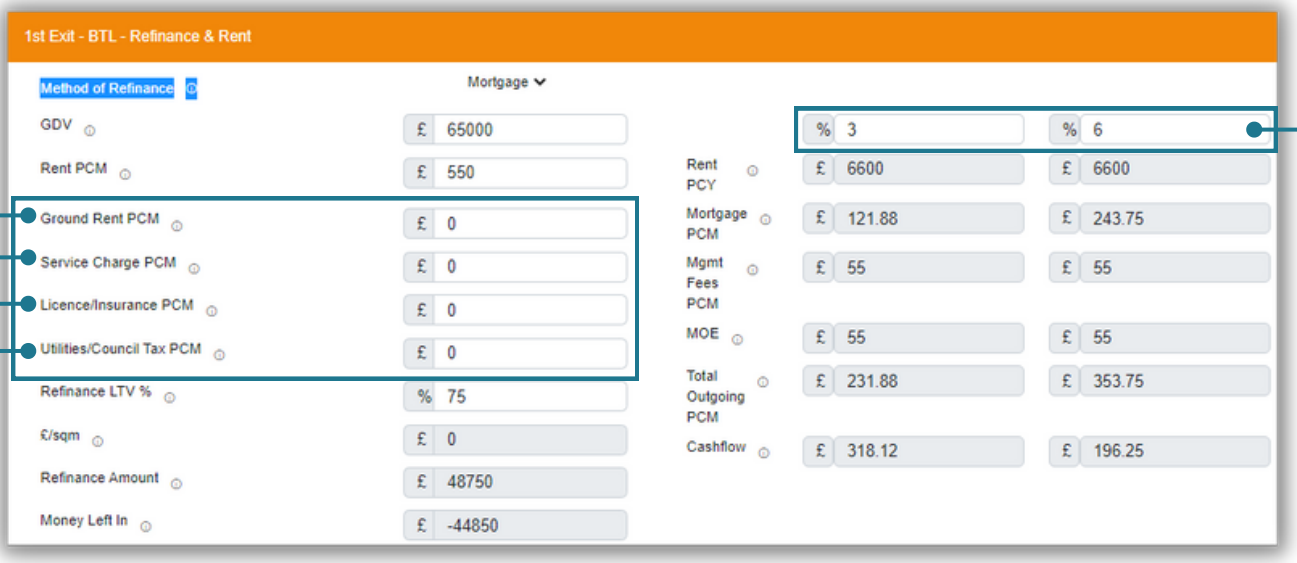
CASH PURCHASE Form



Cash Purchase Form is pretty straightforward with less boxes to fill. Works similarly as the others.

Exit Strategy Forms

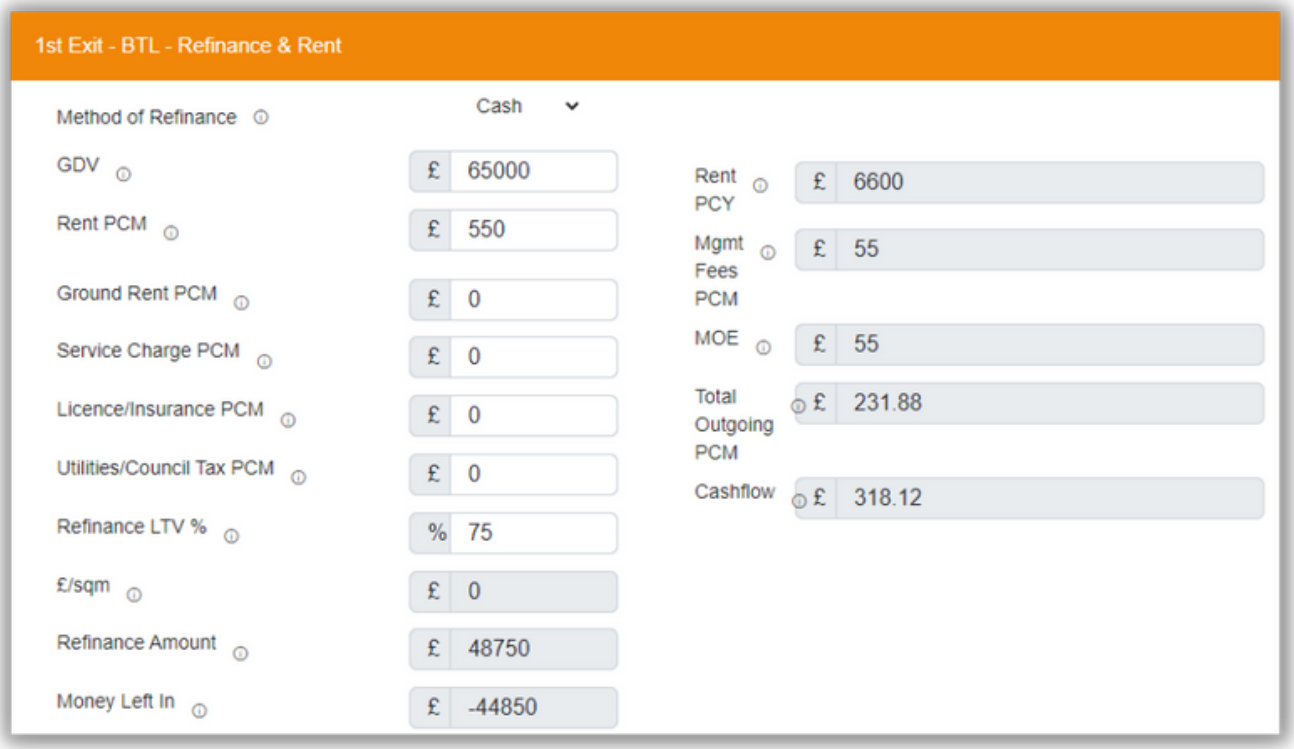
BUY-TO-LET/HMO Exit Form (Mortgage Refinance)



Ground Rent PCM, Service Charge PCM, License/Insurance PCM, and Utilities/Council Tax PCM are greyed out if the property is not a Flat/New Build. Pound per square meter (£/sqm) will only function if property area is provided in the Property Details.

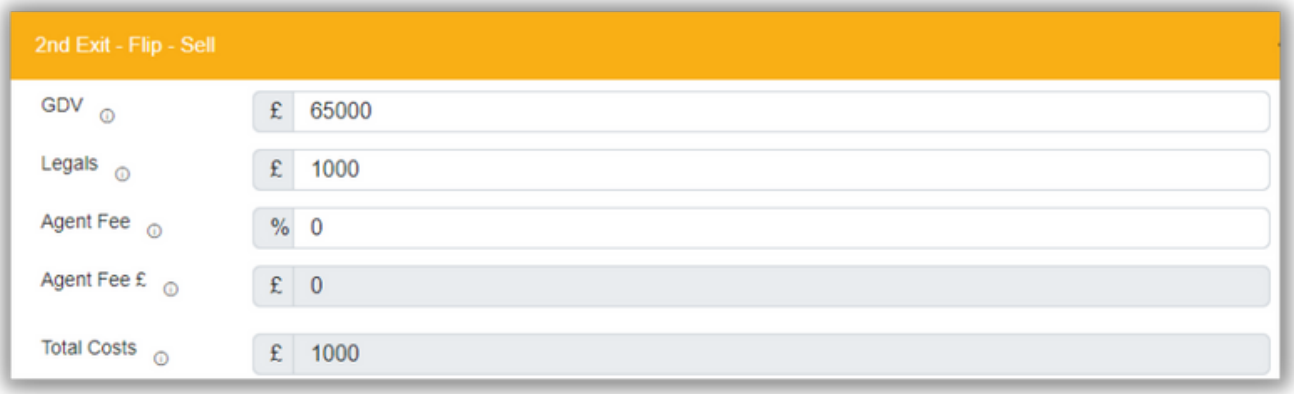
Percentages are for stress testing. You can modify the default percentages in PIPELINE ADMIN.

BUY-TO-LET/HMO Exit Form (Cash)



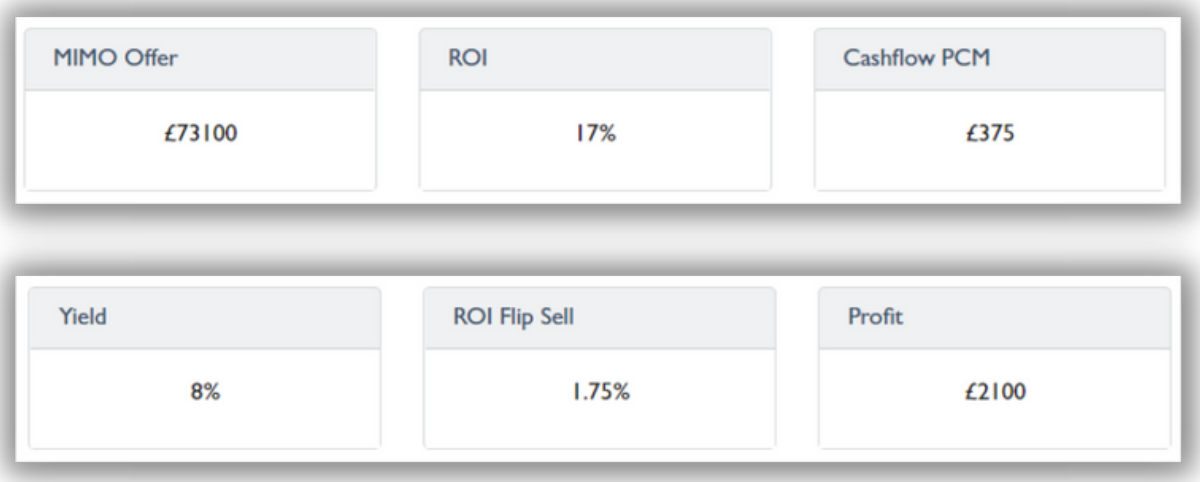
Similar to the Mortgage BTL Exit but without the monthly payments and the need for stress-testing.

FLIP Exit Form



Form to be used for if you're planning for selling the property after fixing it up. Simply input the GDV, Legal cost, and the percentage for the agent. Calculator would automatically calculate how much profit you'll earn and the ROI.

6. Check figures of the property.

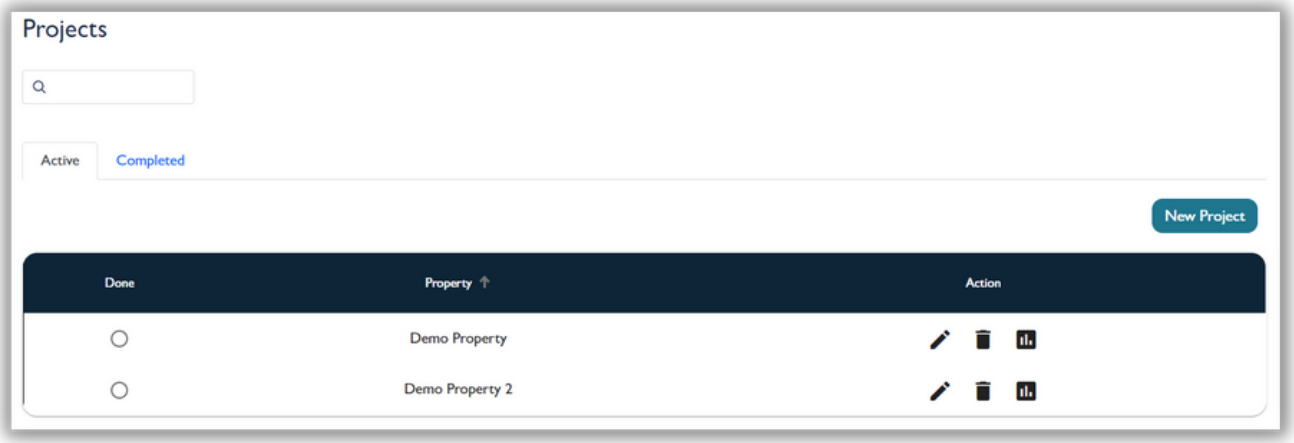


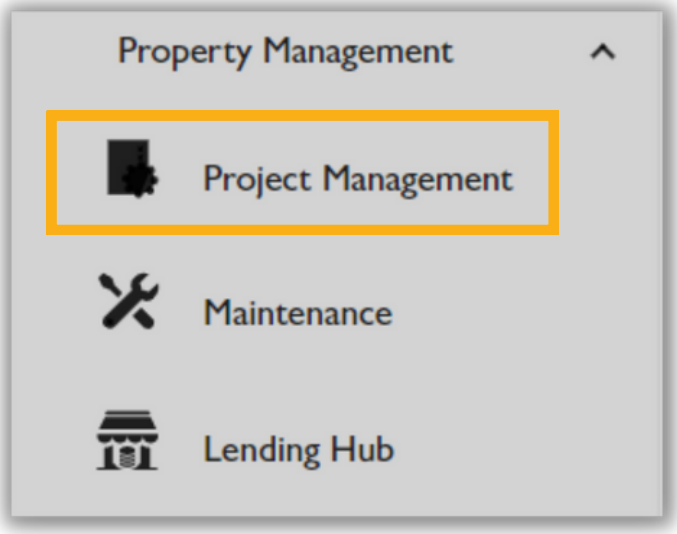
7. Click the "Add Property" Button to save property.

Clicking this button will save the property figures and details and it will be added to the QUALIFIED PROPERTY Stage of your PIPELINE.

PROJECT MANAGEMENT

As you may have already guessed, the Project Management tool is for significant works such as refurbs where there would be multiple activities to be tracked with multiple contacts. As a contractor, you can also use this to track your projects for different clients.

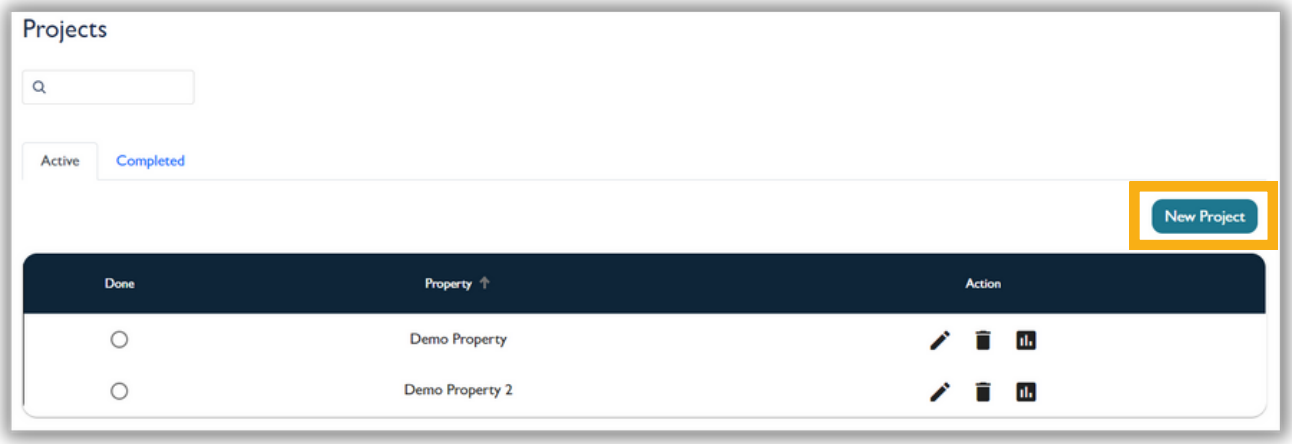




PROJECT MANAGEMENT can be found on the GRAY SIDEBAR under PROPERTY MANAGEMENT.

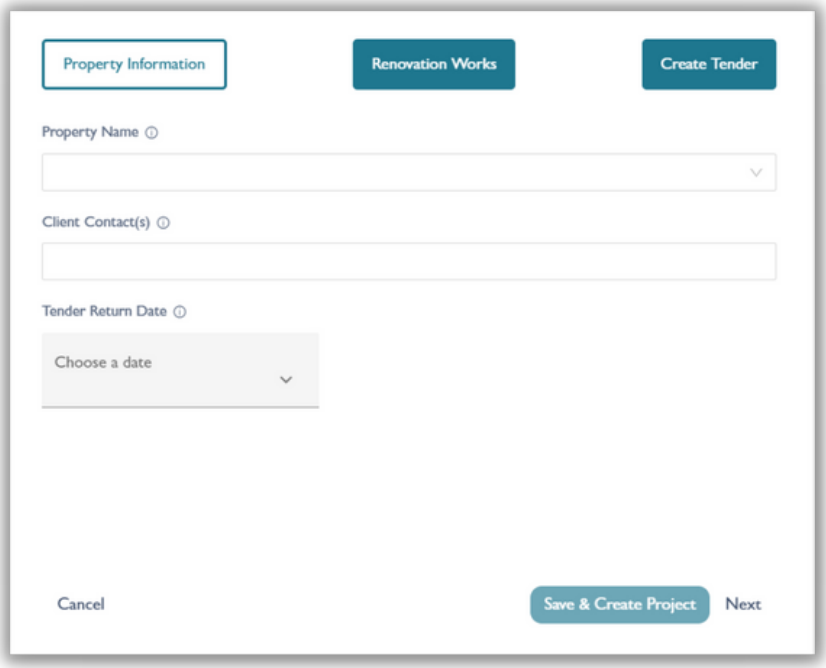
STARTING A PROJECT

1. Click the "New Project" Button.



2. Fill in the details of your new Project.

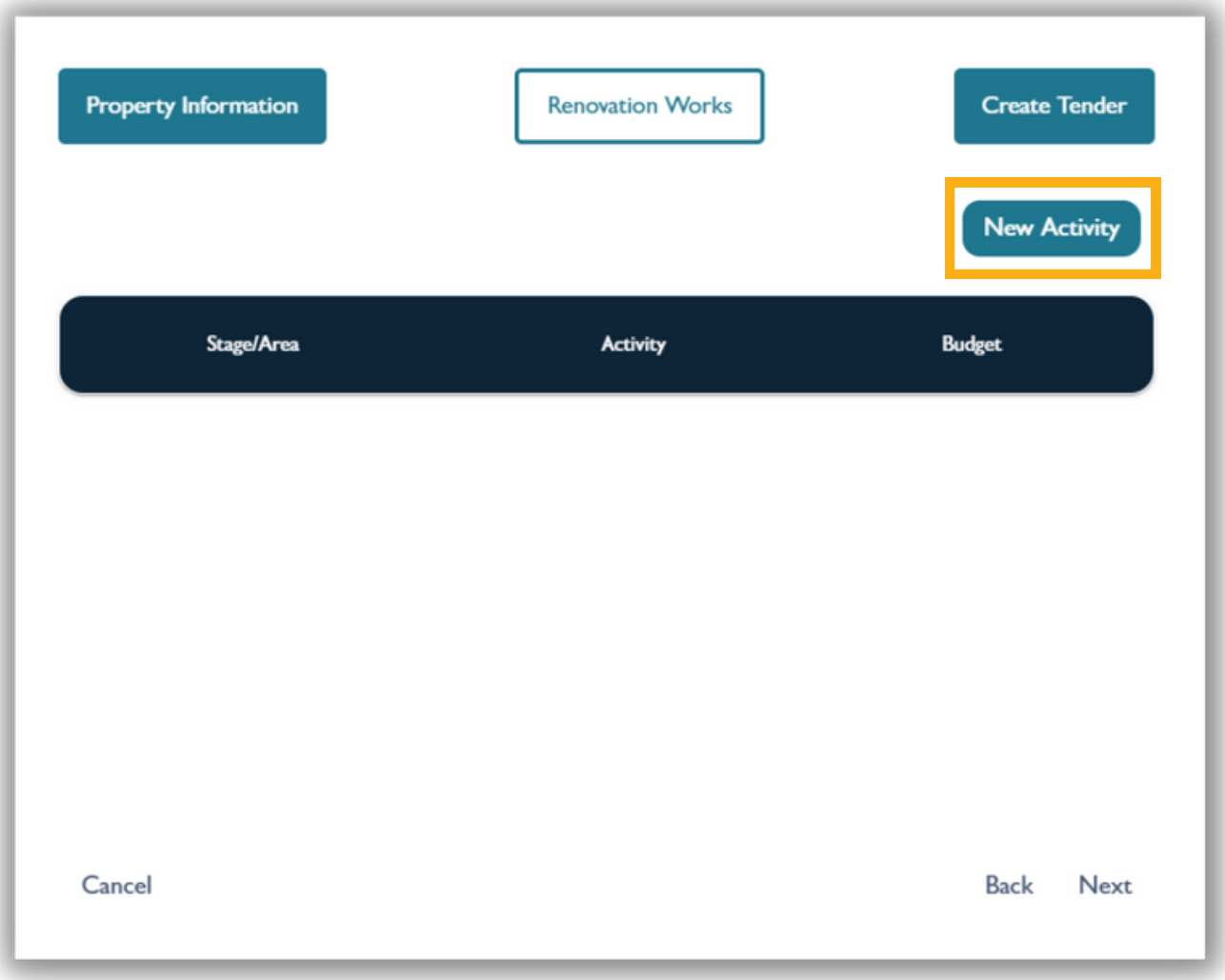
Choose from all the properties in your Pipeline here.
You can designate to a specific client the project here.



You may click the "Save & Create Project" button if you want to save the project and add details later.

Click "Next" to proceed and add specific details for the project.

3. Click the "New Activity" button.



4. Fill in the CREATE ACTIVITY form.

Can set Stage/Area here such as "Kitchen" or "Carpet Stage"

Can set any Activity here such as "Kitchen Repaint" or "Carpet Ripping"

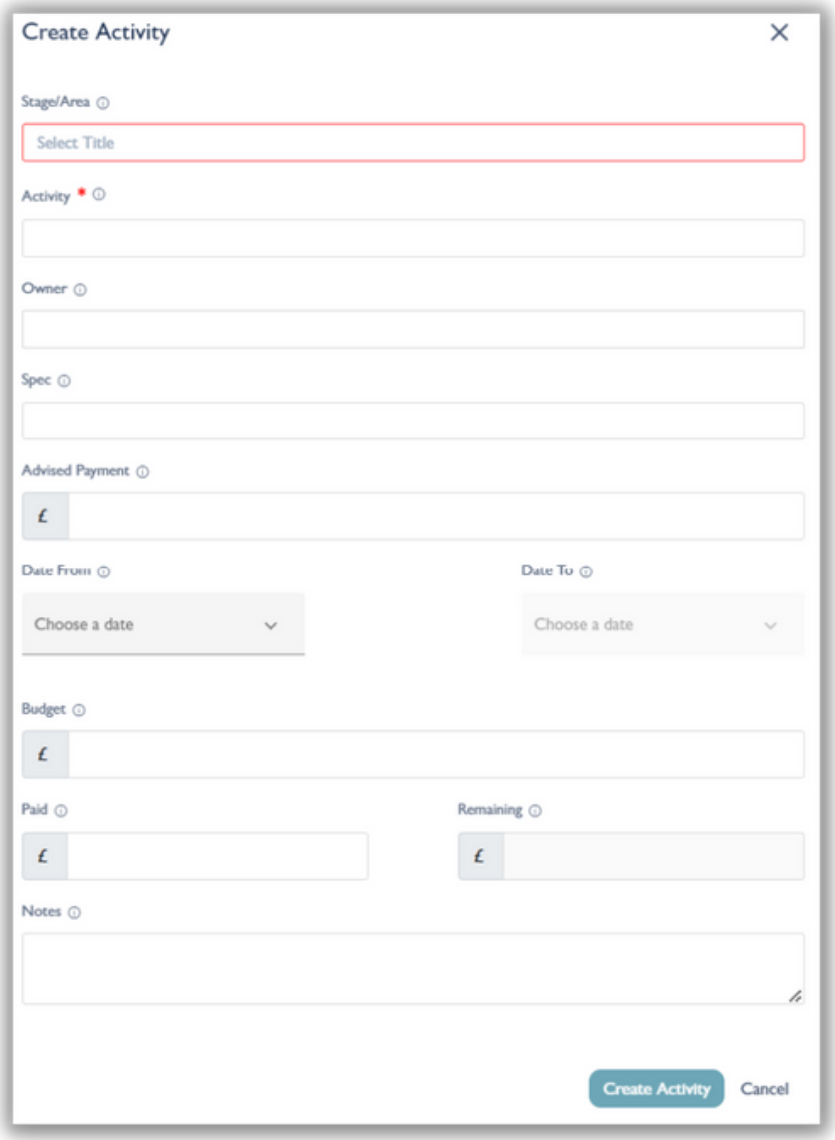
Contacts such as Plumbers associated with this activity for easy tracking.

Can set any specification here such as "Red Paint" or "10x12 New Carpet"

Price that you quoted for a client or price that a project manager quoted for you

Budget price including for contingencies to easily track if you went overbudget

Remaining budget is automatically calculated for you here.

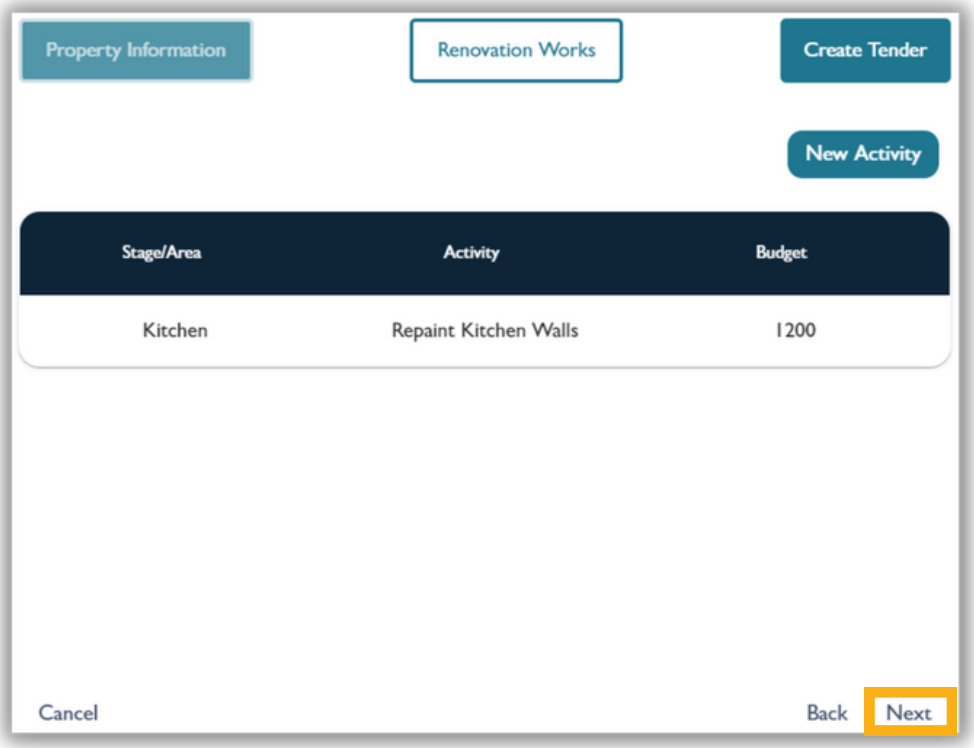


Once done, click the "Create Activity" button to save the activity.

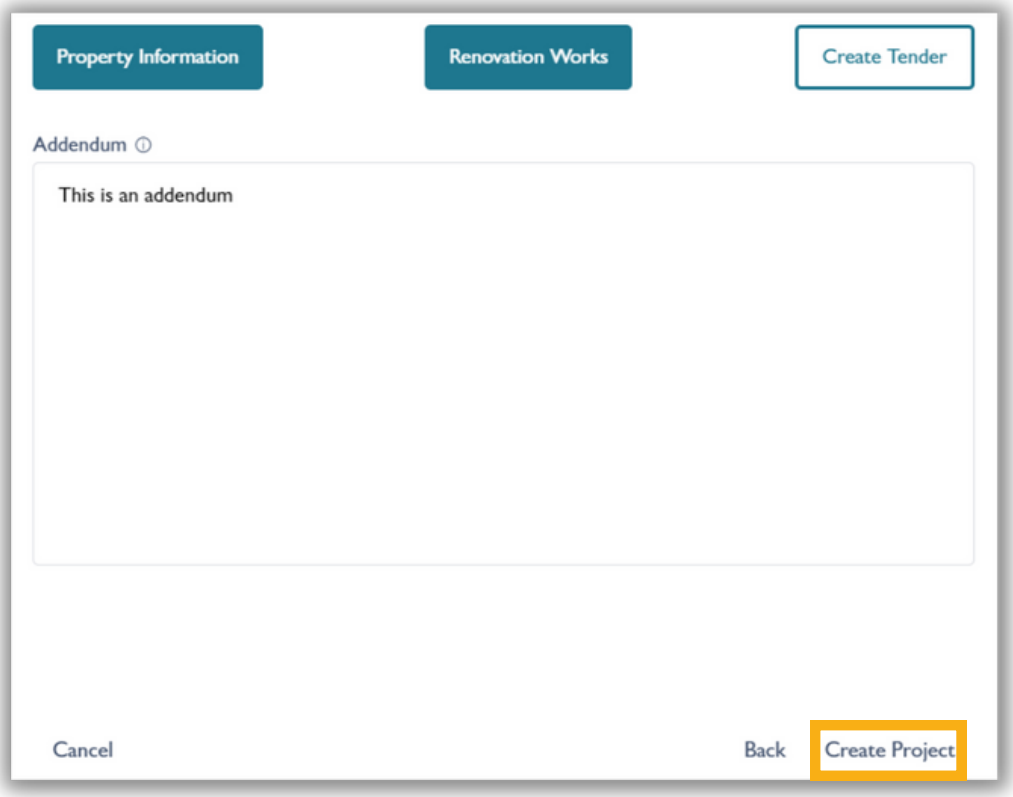
5. Click "Next" to continue.

Created activity will show here

Click "Next" again to continue.



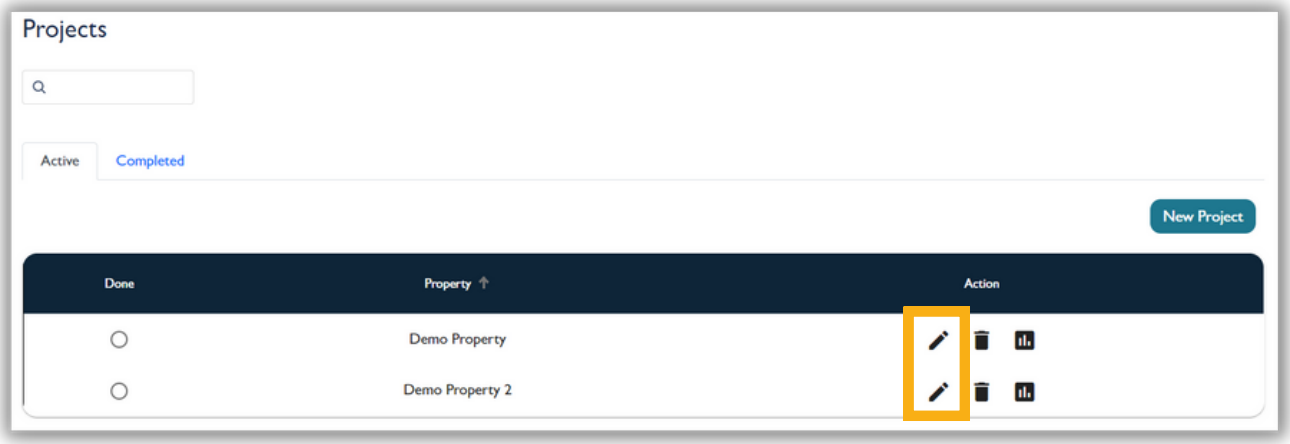
6. Add an Addendum if needed and click "Create Project".



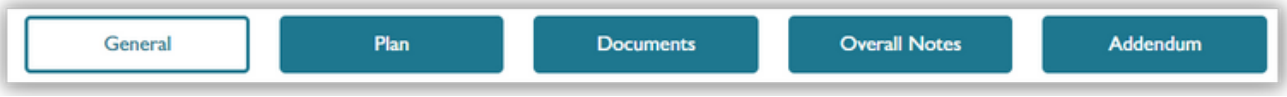
After clicking the button, your project is now finalized and can be edited if needed, which will be discussed next.

EDITING PROJECTS

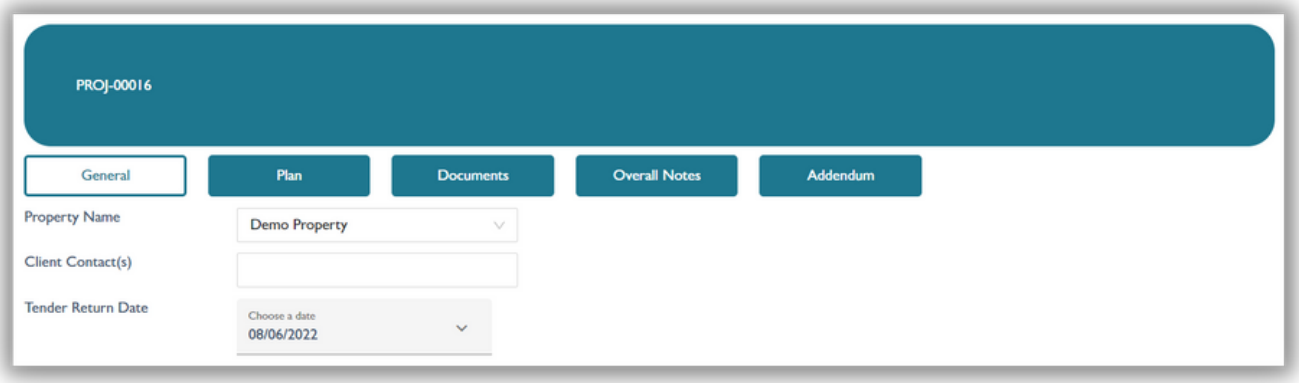
1. Click the Pencil Icon beside chosen Project.



2. Choose which Tab you want to edit to.

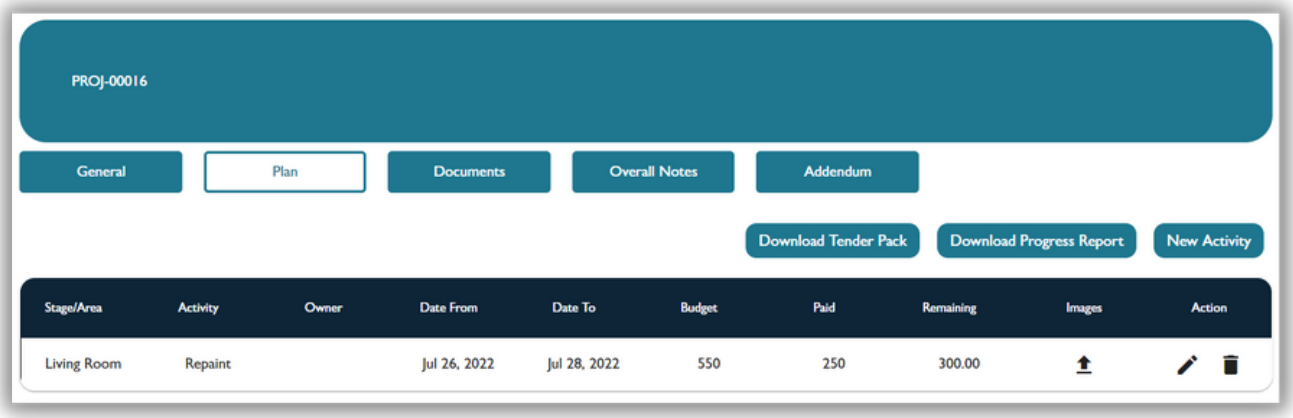


3. General Tab



In the General Tab, you may edit which Property was associated to the Project, the associated client of the Project, and the Tender Return Date.

4. Plan Tab



In the Plan Tab, you may edit your created activities and update your expenses so you may update your remaining budget. In addition, you can create new activities.

Plan Tab also has multiple buttons that you can use as shown below:

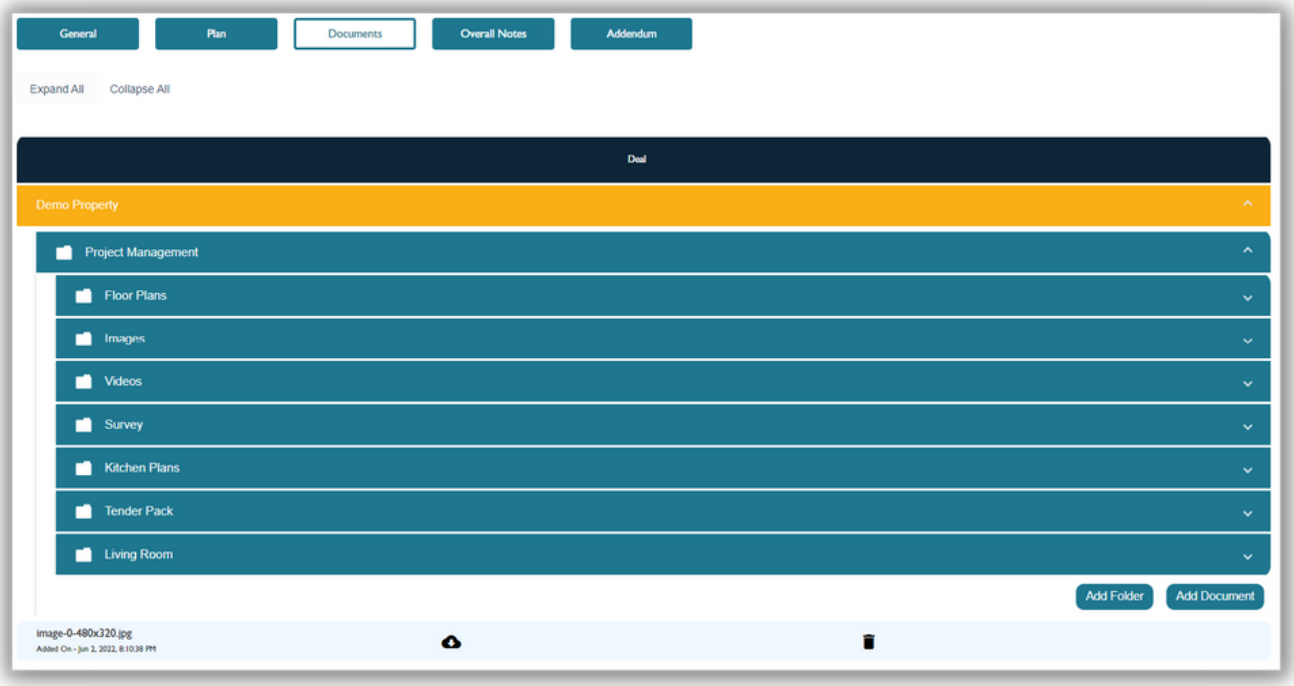
Downloads a pre-formatted invitation to tender document.

Downloads a pre-formatted project updates document based on the activities added.

Allows you to create a new activity for the chosen project. Please go to Step 3 of "Steps to add a New Project" for the step by step guide.

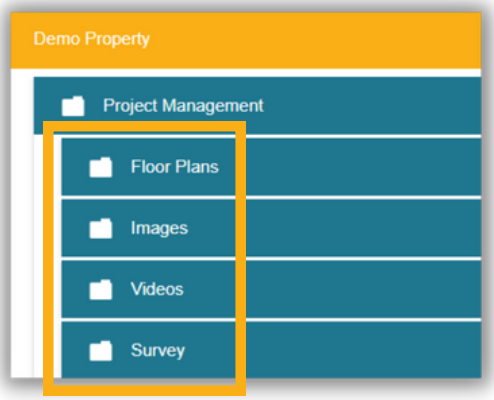
Allows you to upload an image for the specific Stage/Area. Uploaded images can be found on the DOCUMENTS tab

5. Documents Tab



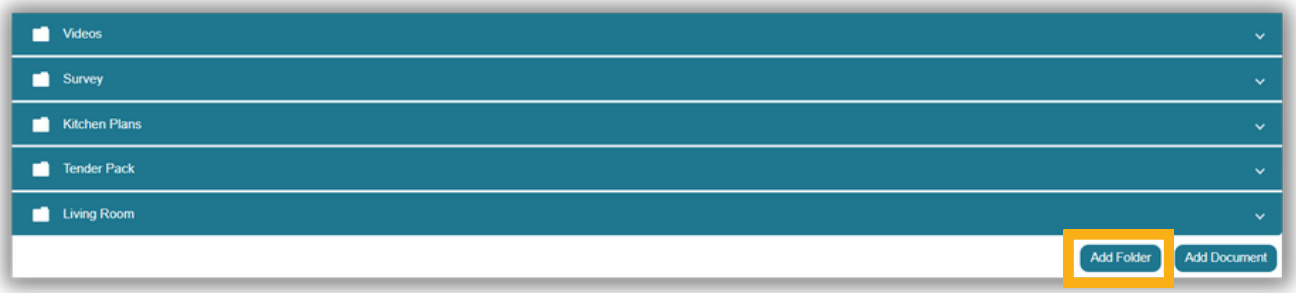
The Documents tab is where you can upload files and images to make it easier for you to manage the project. Whenever a project is created, a subfolders called "Project Management" will be created for it as seen below:

Inside the folder are other subfolders so you can easily organize your documents.

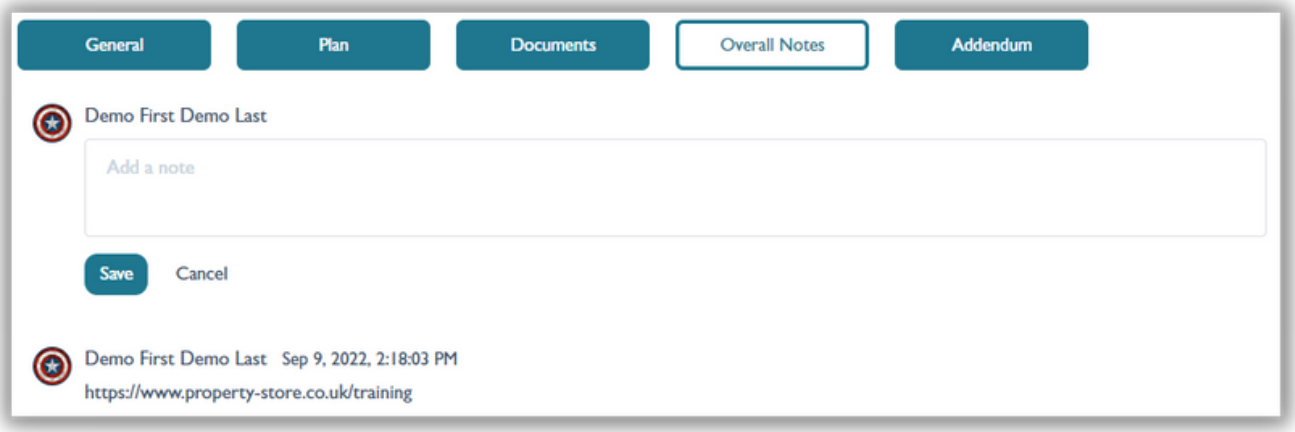


To add a document to any subfolder, click the the subfolder to reveal the "Add Document" button as shown below:

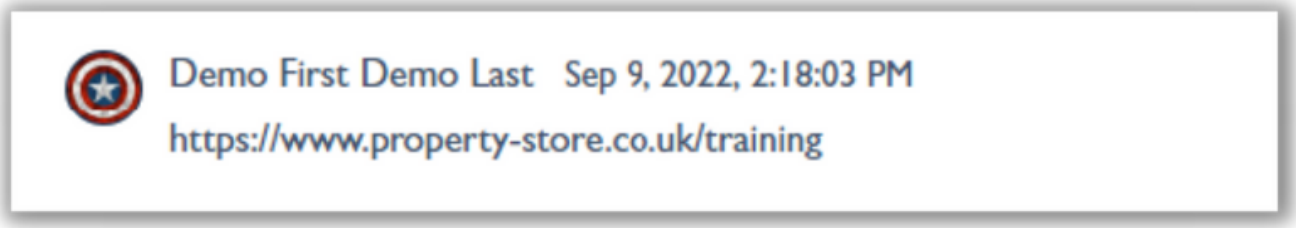
If you want to add your own custom folder, click the "Add Folder" button at the bottom of all the subfolders as shown below:



6. Overall Notes Tab

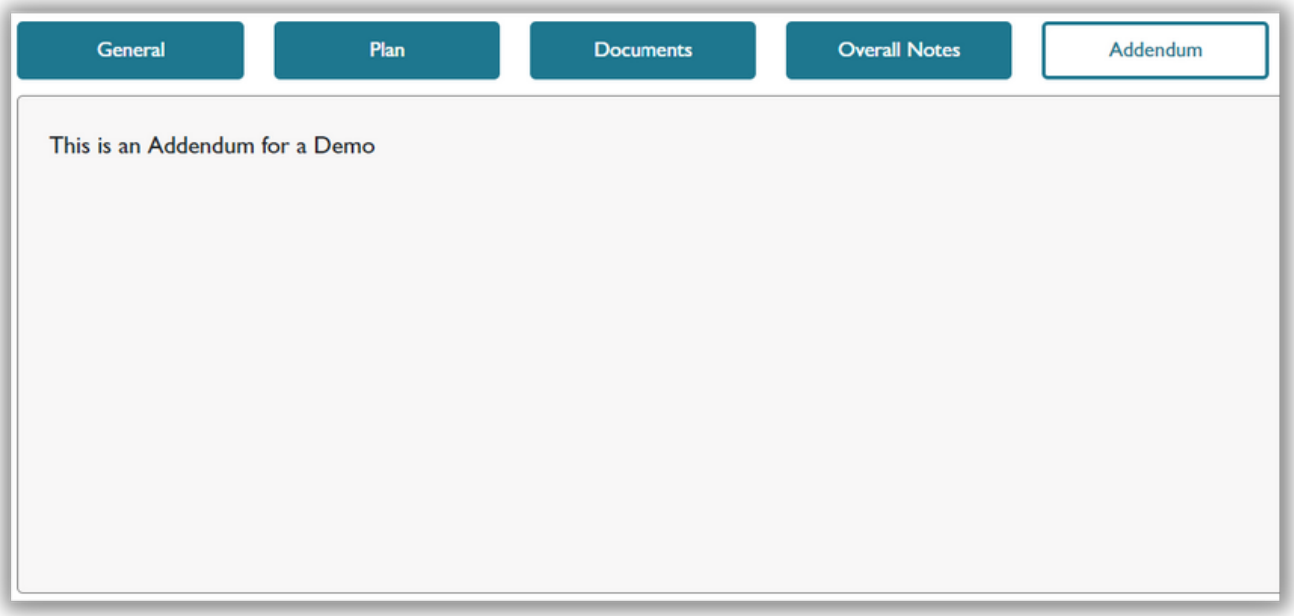


You can add notes for the project in this tab. These notes will show on the pre-formatted progress report that you can download in the PLAN Tab.



Any URL added here and on as a note on other tools are also clickable and would open a new tab to go to the address.

7. Addendum Tab



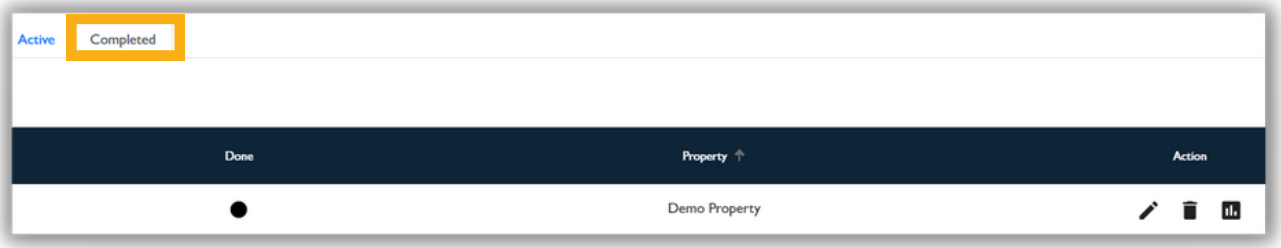
Addendum added here will also show on the downloadable report.

OTHER FEATURES

1. Projects can be marked as completed and archived.

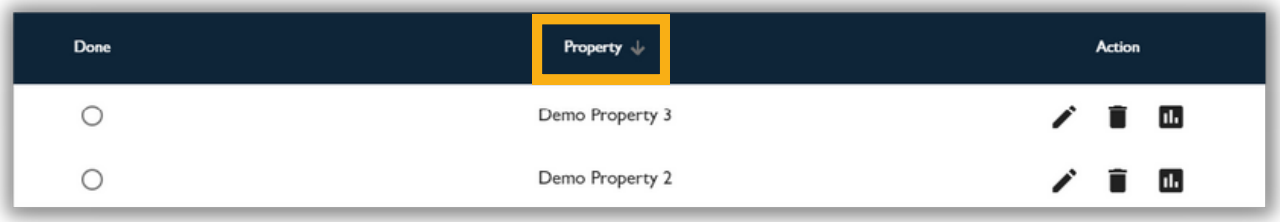
Clicking the small circle as shown above will mark the Project as COMPLETED and will be archived.

To find the archived projects, simply click the COMPLETED Tab.

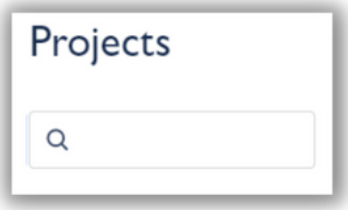


2. Projects can be sorted.

Simply click on the "Property" column header to sort the projects from increasing to decreasing and vice versa. Useful for large sets of projects.



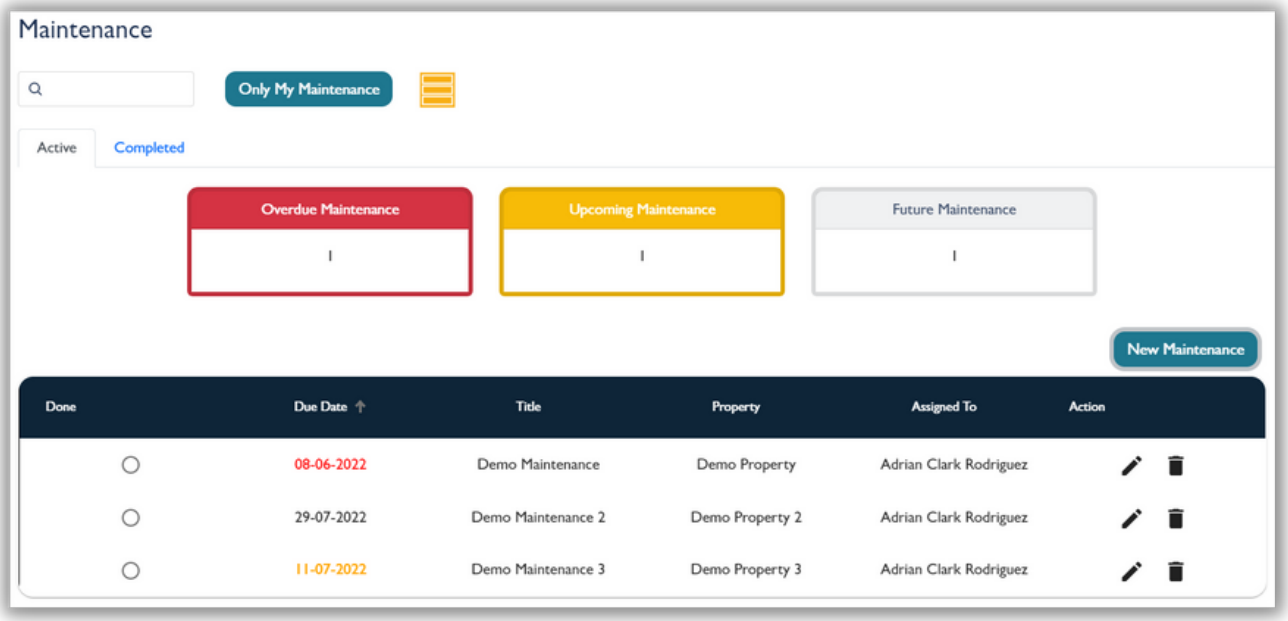
3. Projects search function.

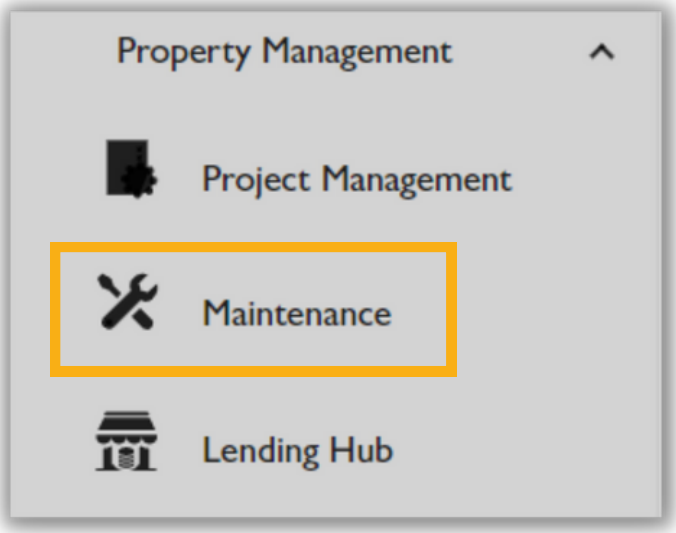


While the Search Function on the Orange Sidebar searches everywhere, this search box will only look for projects.

MAINTENANCE

Unlike projects, maintenance activities are small, one time or recurring jobs meant to preserve the good condition of your property. The MAINTENANCE tool in Property Store is designed with that in mind.

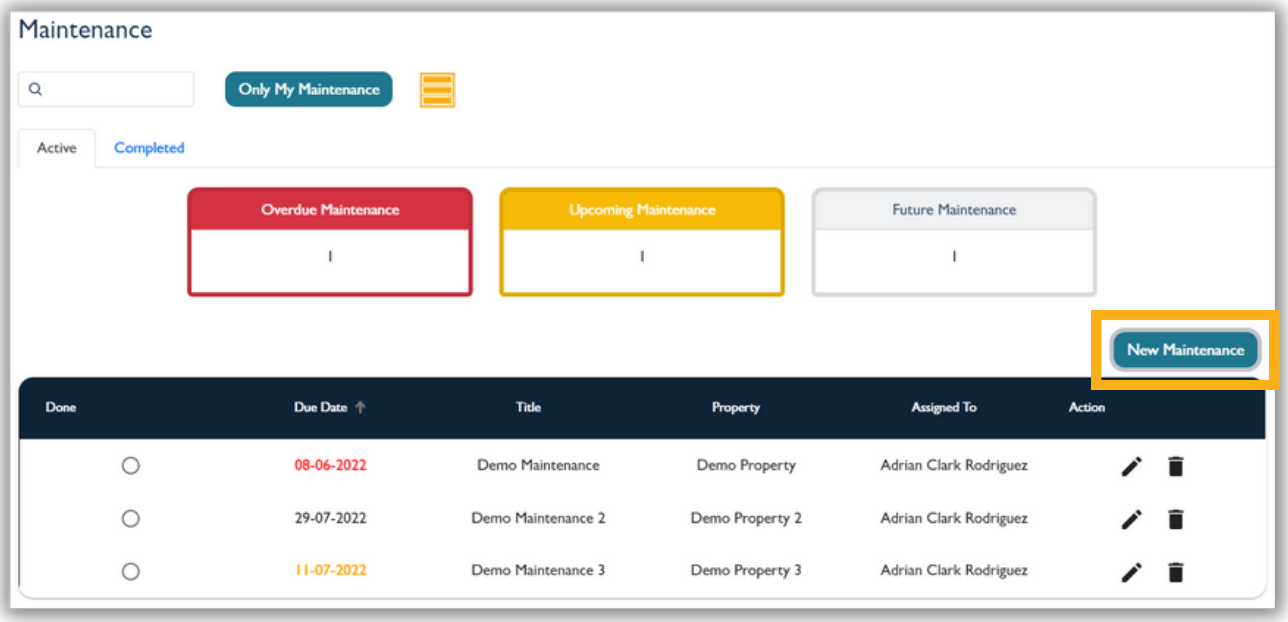




MAINTENANCE can be found on the GRAY SIDEBAR under PROPERTY MANAGEMENT.

CREATE TICKET

1. Click the "New Maintenance" Button.



You may also click the MAINTENANCE Icon on the Orange Sidebar:

2. Fill in the MAINTENANCE Form.

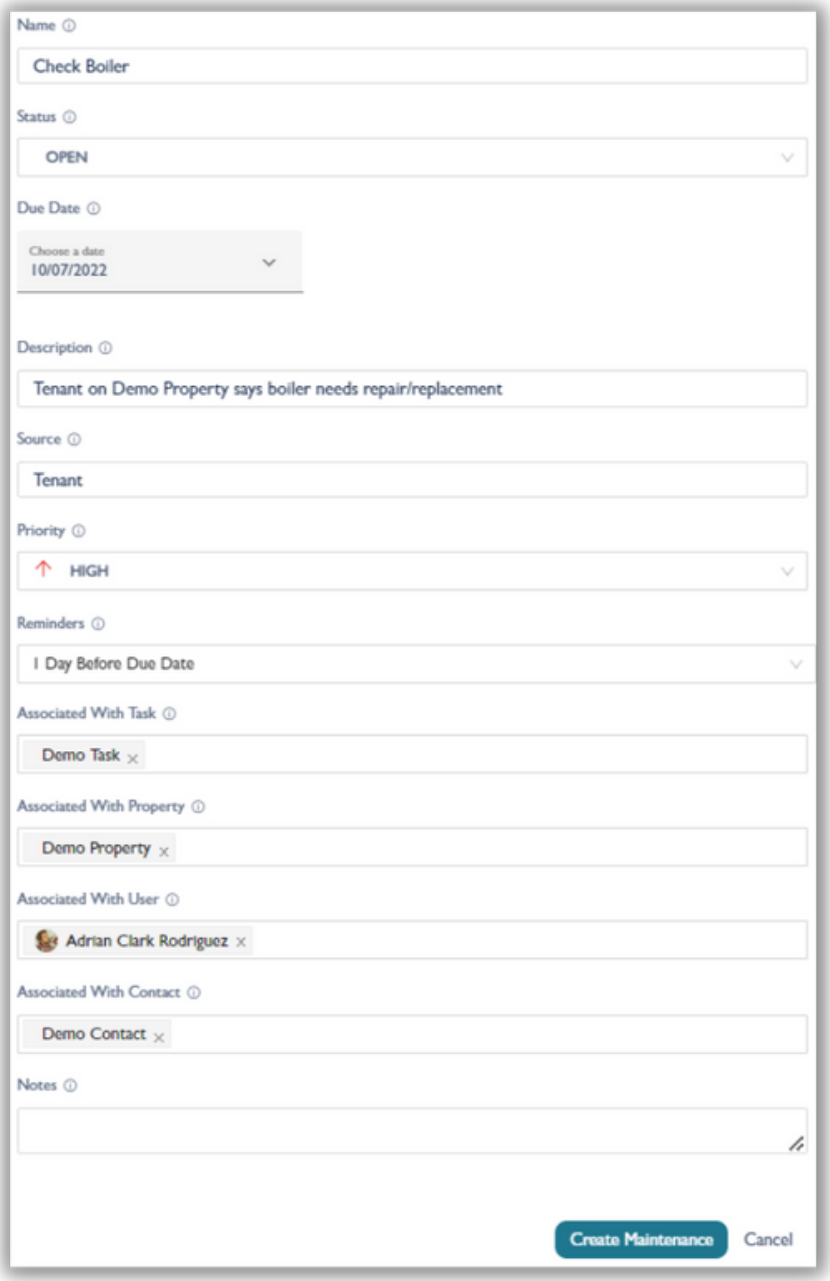
Set STATUS to open to receive reminders and notifications.

Set to easily remember who raised the ticket.

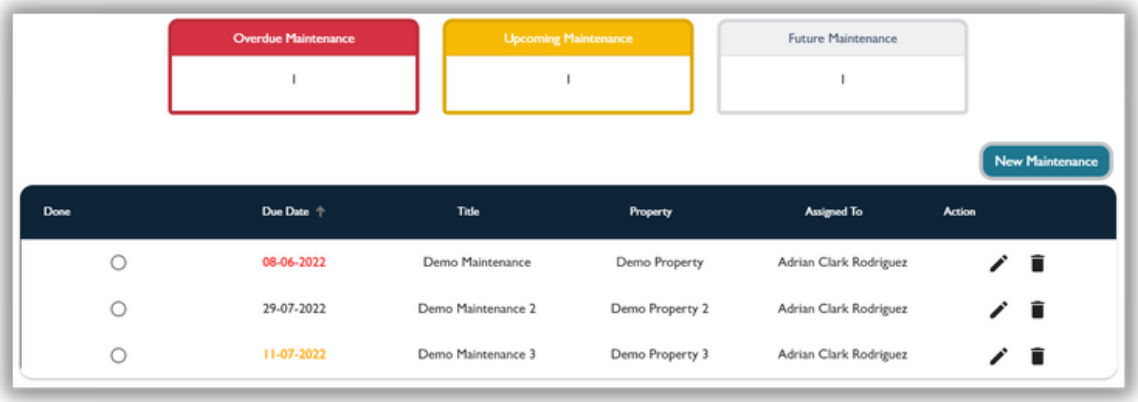
If set, you will receive an email regarding this task.

If set, maintenance ticket will show up on the property details.

Set to easily remember your client for this ticket.

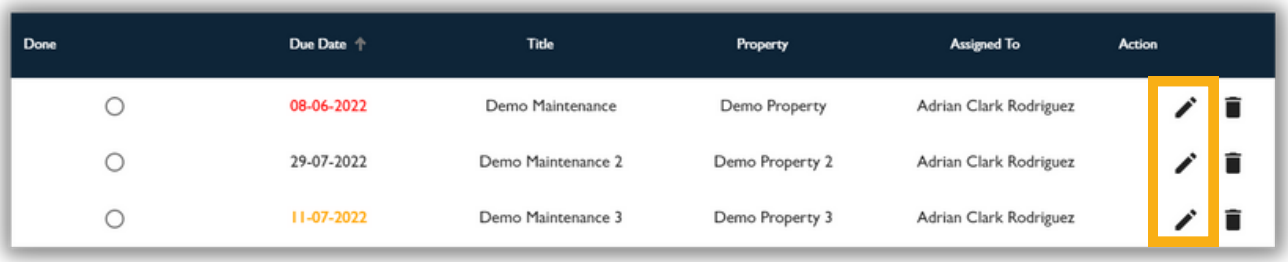


Created MAINTENANCE tickets will be appear in the MAINTENANCE overview as shown below:



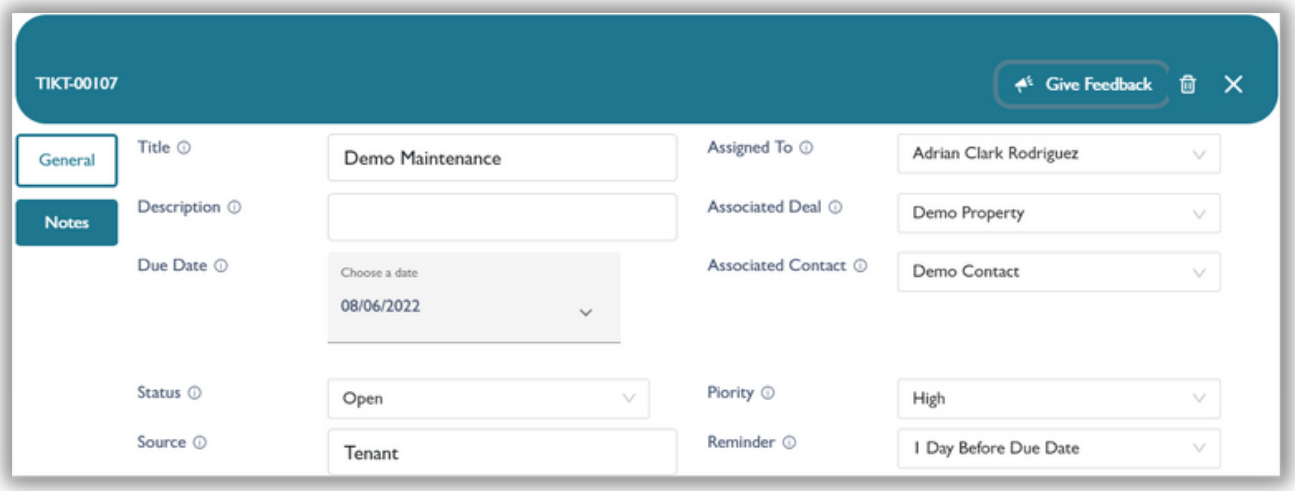
EDITING TICKETS

1. Click the Pencil Icon beside the chosen ticket.



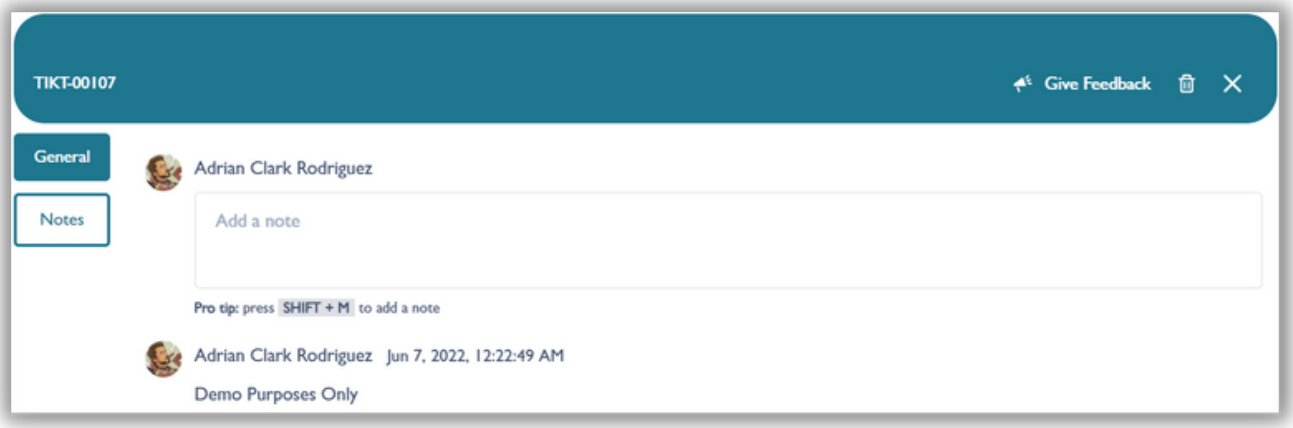
2. Choose the Tab that you want to edit.

General Tab



General information can be edited here. You can change the due date and the priority of the ticket to make it easier for you to prioritize.

Notes Tab

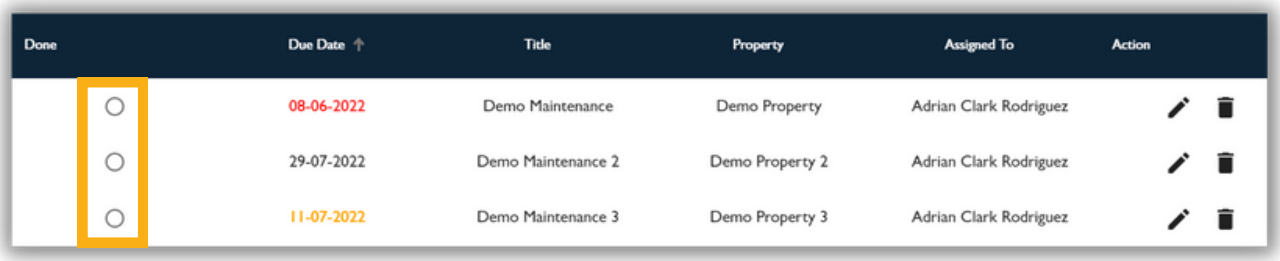


URLS added as notes are clickable and would follow the link on a new tab.

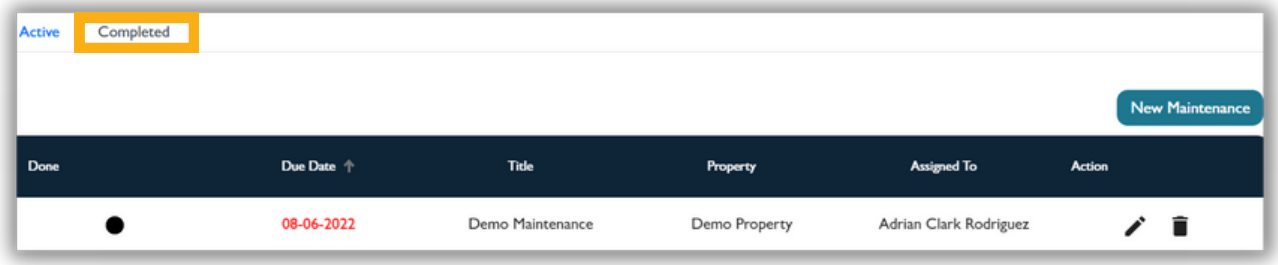
OTHER FEATURES

1. Tickets can be marked as completed and archived.

Similar to PROJECTS, clicking the small circle as shown below will mark the Project as COMPLETED and will be archived.

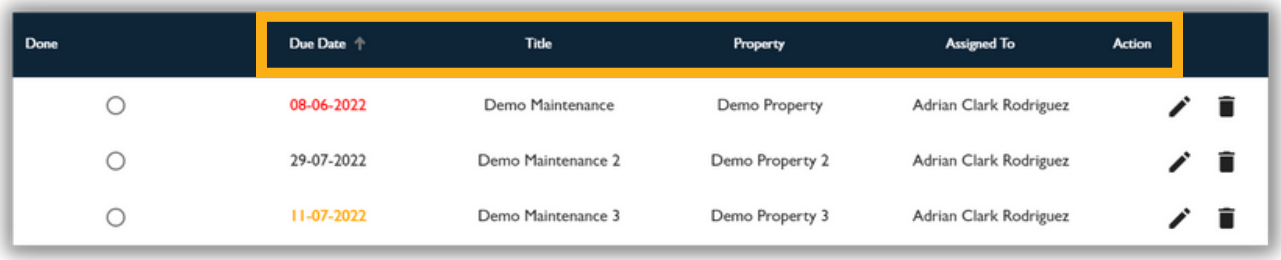


To find the archived tickets, simply click the COMPLETED Tab.

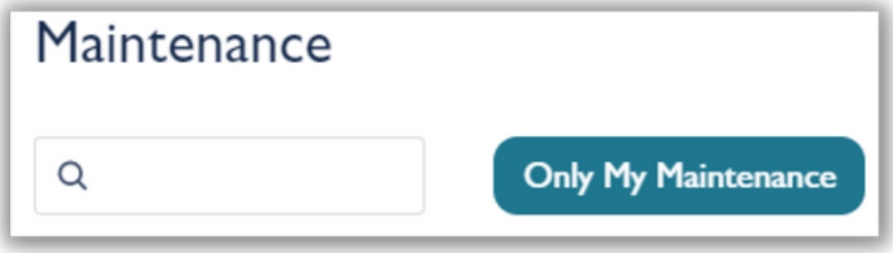


2. MAINTENANCE tickets can be sorted.

Simply click on the column headers to sort the projects from increasing to decreasing and vice versa. Useful for large sets of projects.



3. MAINTENANCE tickets search function.



Similar to the Project search function, this search box will only look for MAINTENANCE tickets.

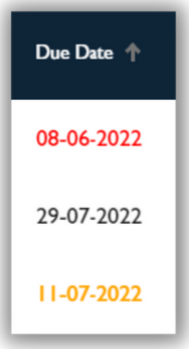
The "Only My Maintenance" button will only look for tickets that were assigned to you via the "Associated with User" detail in the Create MAINTENANCE Form.

4. MAINTENANCE tickets Status.

Tickets that are past their due date.

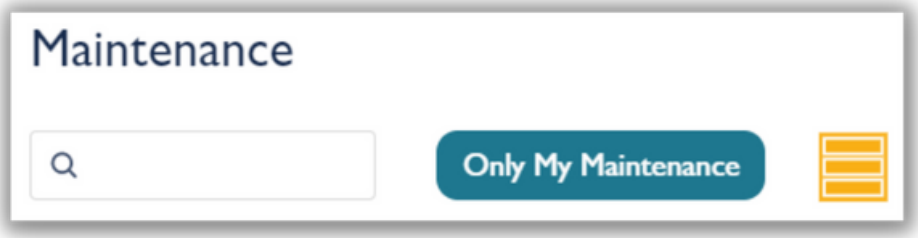
Tickets that are due within 7 days.

Tickets that are not due for the next 7 days.

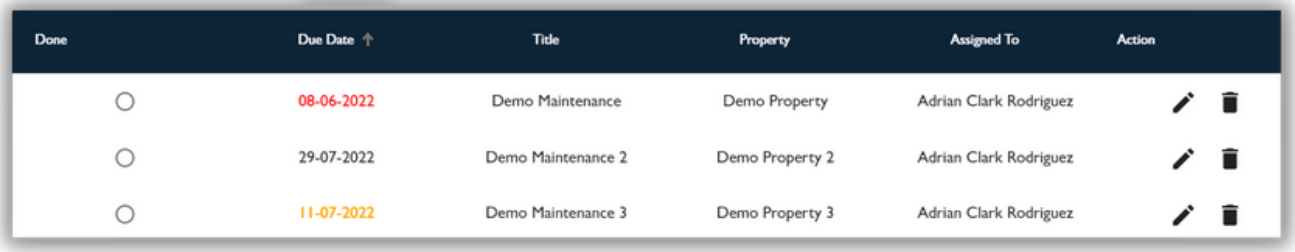


Dates are color coded based on the categories above.

5. KANBAN View and LIST View.



LIST View

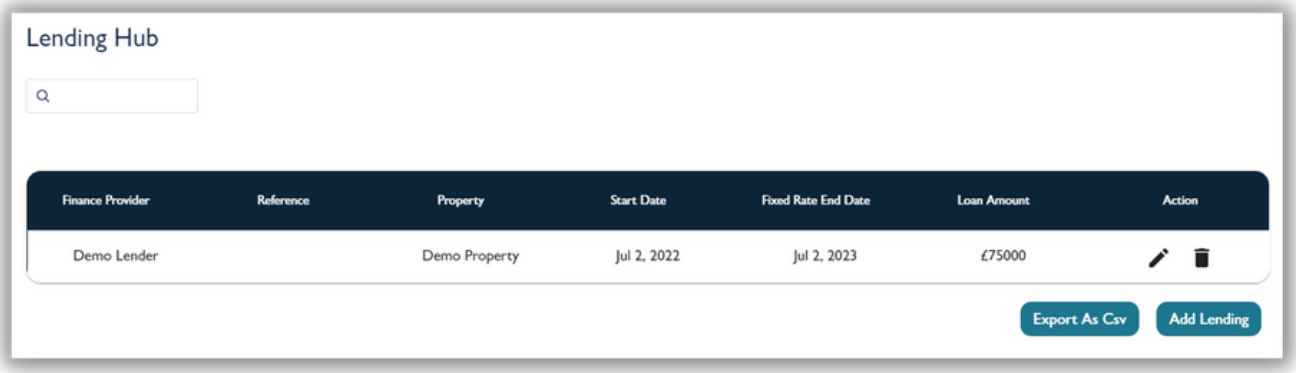


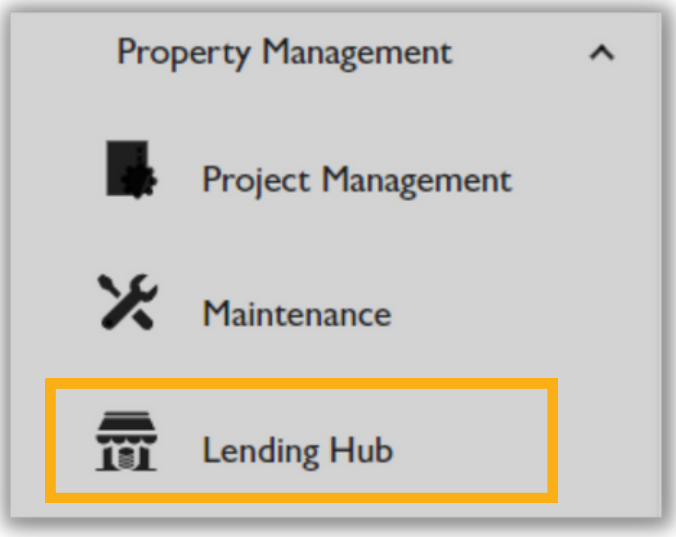
KANBAN View

Similar to your PIPELINE, you can drag and drop MAINTENANCE tickets to different stages. Placing the ticket on the "DONE" stage archives them and places them on the COMPLETED tab of the LIST view

LENDING HUB

You can add your loans in Property Store. This will make it easier to track and will send notifications if payments are due or if your rates are about to change. Once all your loans are in Property Store, you can download a pre-formatted document that you can share with your broker when needed.

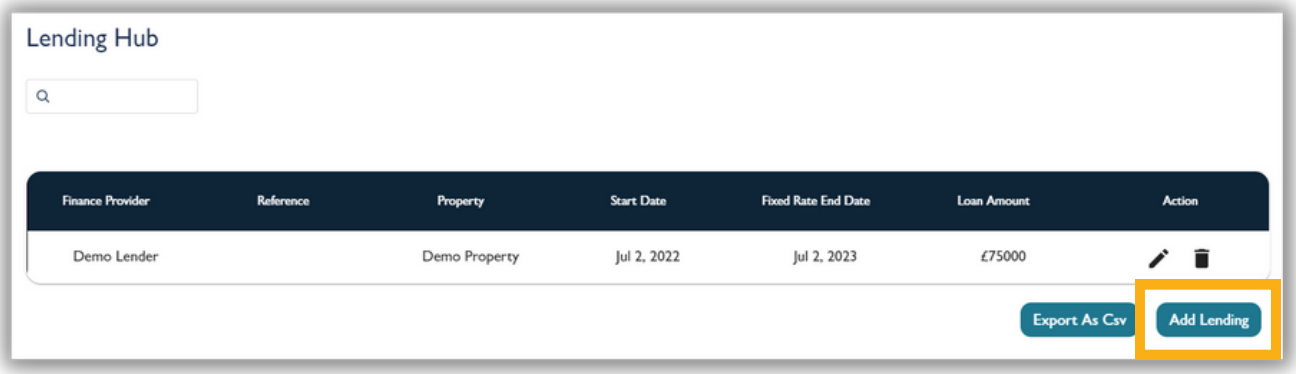




LENDING HUB can be found on the GRAY SIDEBAR under PROPERTY MANAGEMENT.

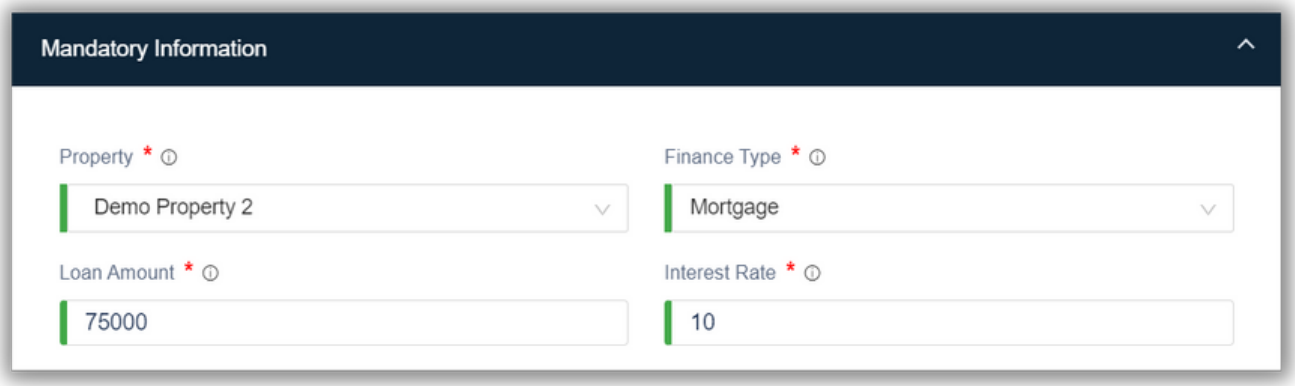
ADDING LOANS

1. Click the "Add Lending" button.

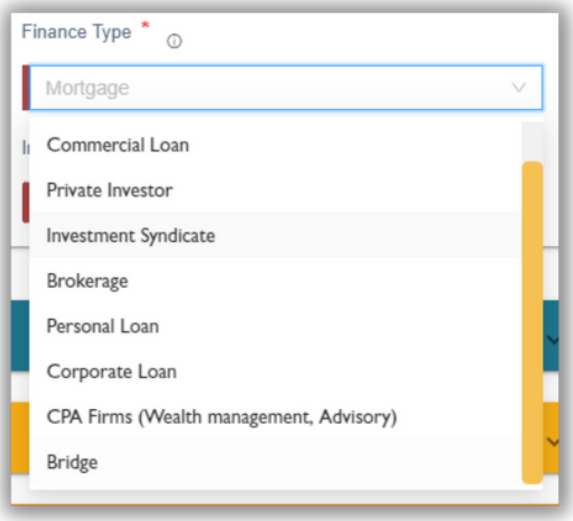


2. Fill in the ADD LOAN form and the following tabs.

3. Mandatory Information Form

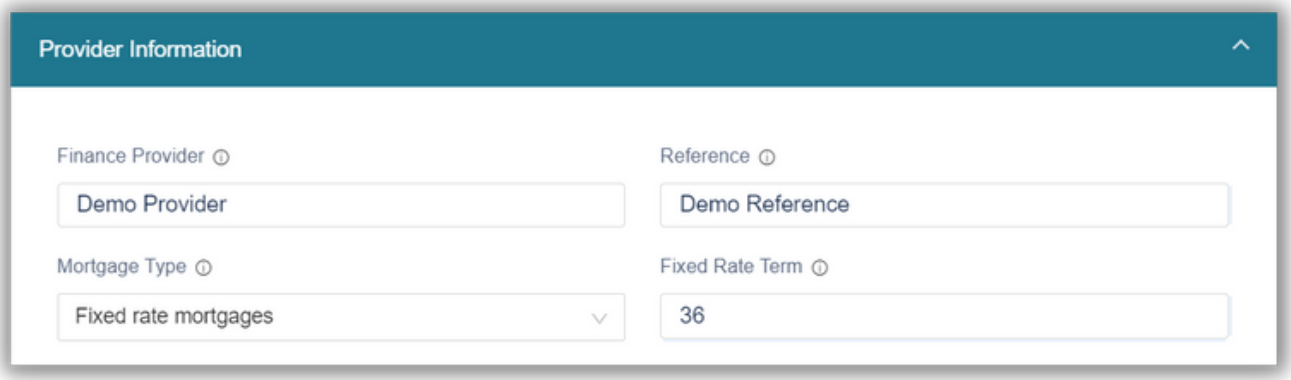


As you may have already guessed, the information here are required to add the loan to Property Store. The rest of the tabs below are optional but we suggest you fill in as it may come handy for you in the future if all the details are in one place. Associating a Property with the loan would make the loan show up in the details of the property.

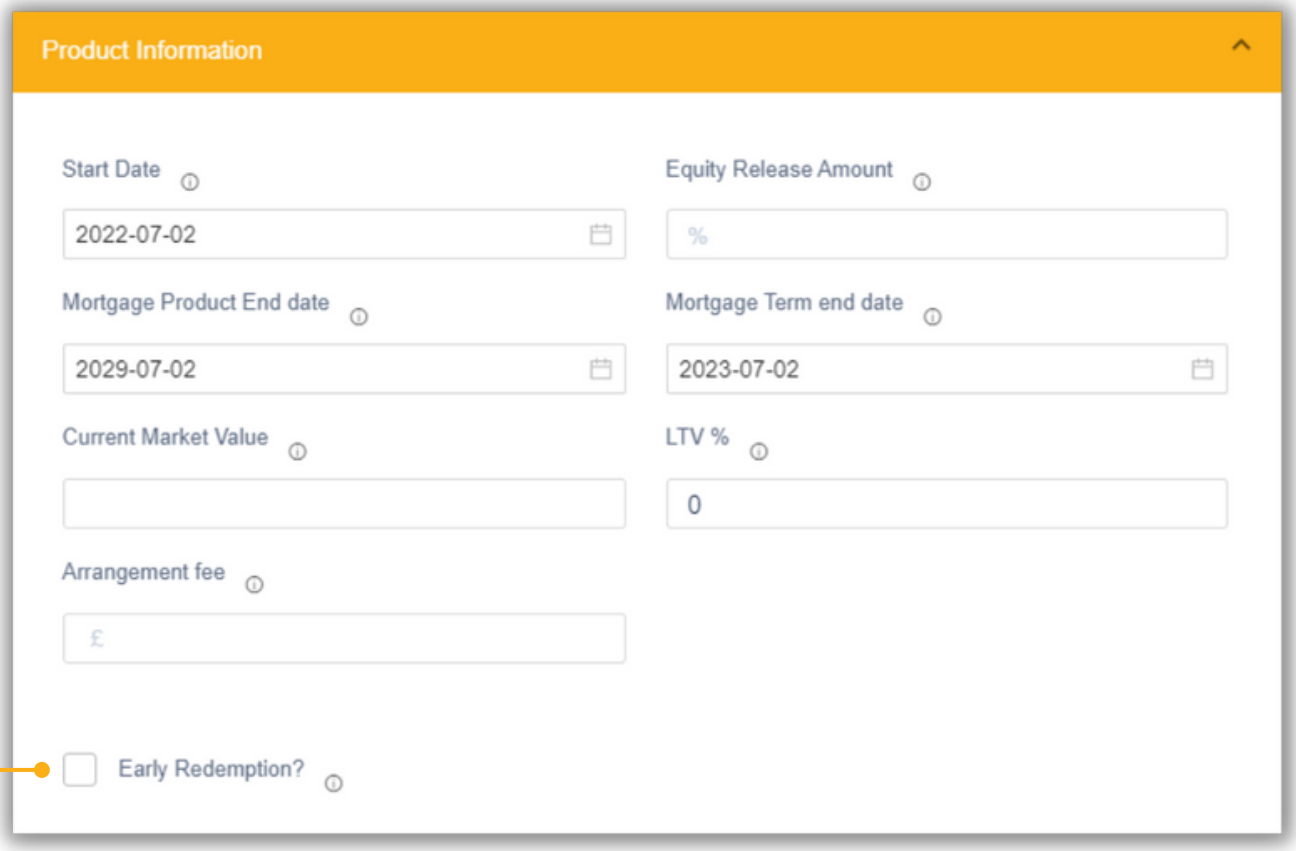


Shown here are the different Finance Types that you can set.

4. Provider Information Form

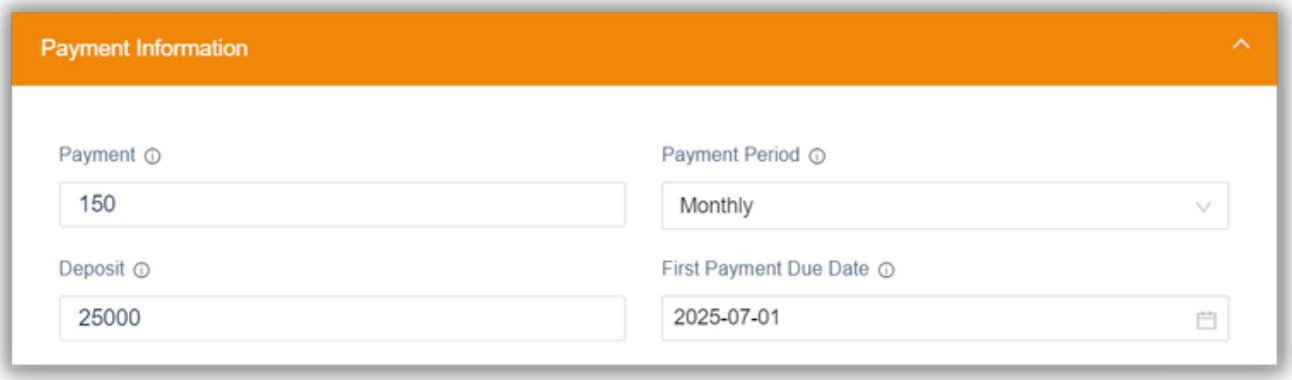


5. Product Information Form

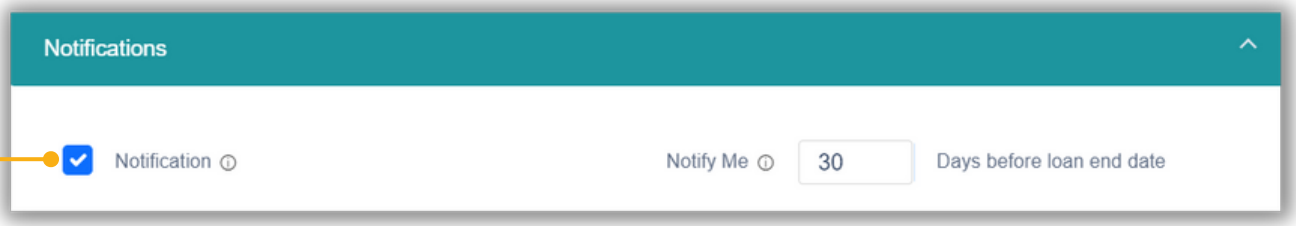


Tick this box to show additional details pertaining to early redemption fees.

6. Payment Information Form



7. Notifications Form

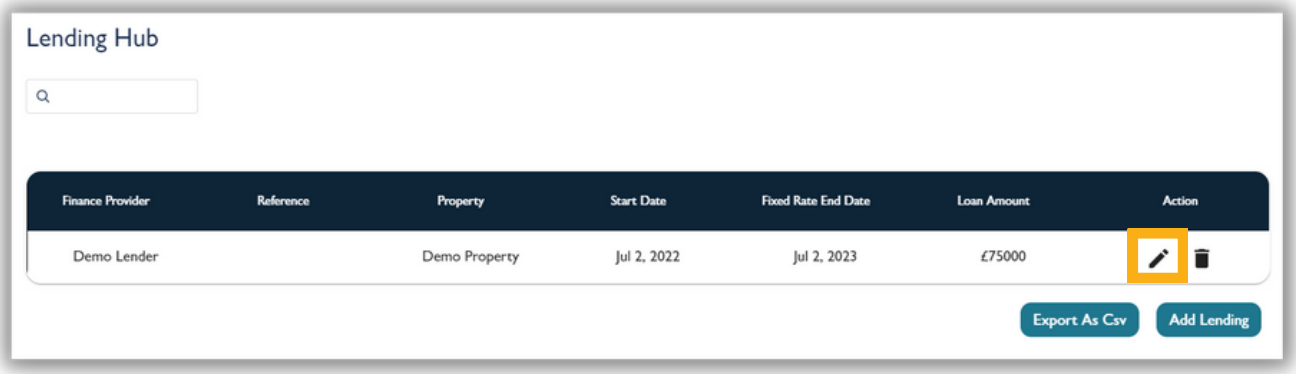


Tick this if you want to be notified via email when the fixed rate period is coming to an end.

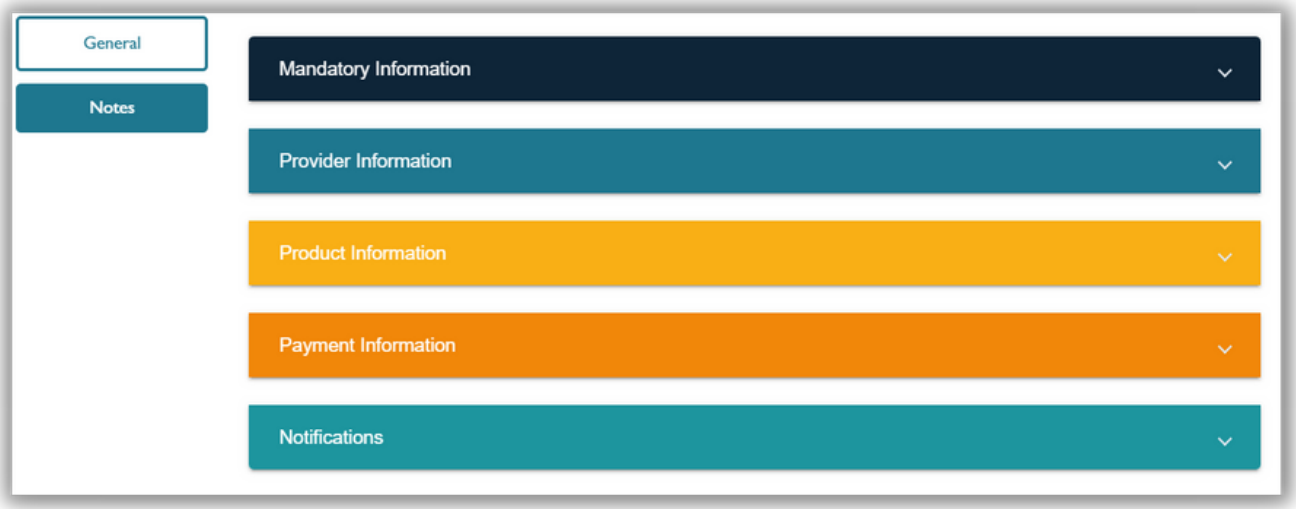
8. Finalize and click the "Create Loan" button.

EDITING LOANS

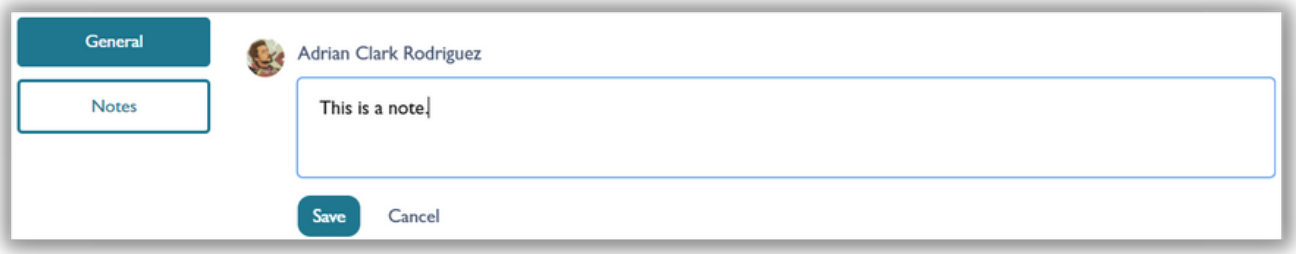
1. Click the Pencil Icon.



2. Edit any Forms in the General Tab.



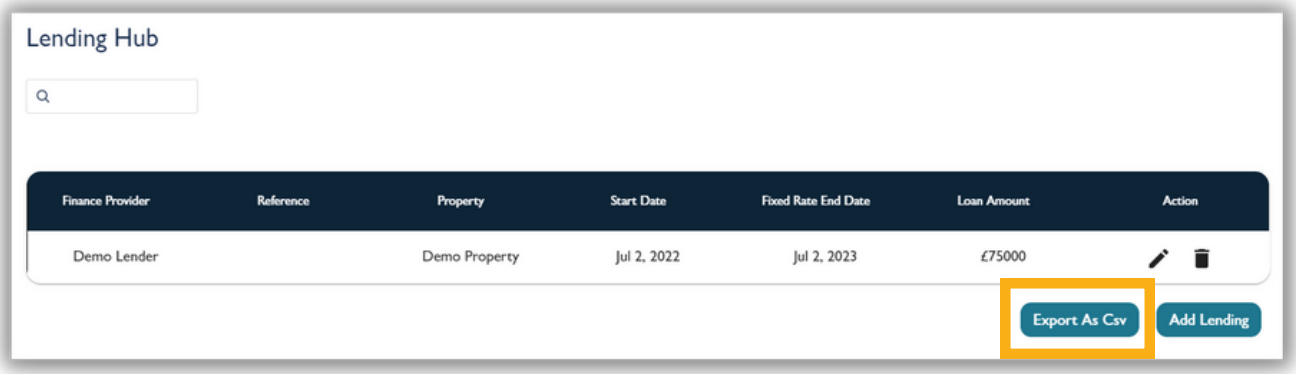
3. Add any comments you want in the Notes Tab.



Similar to the other notes, URL added are clickable and would open that link on a new tab.

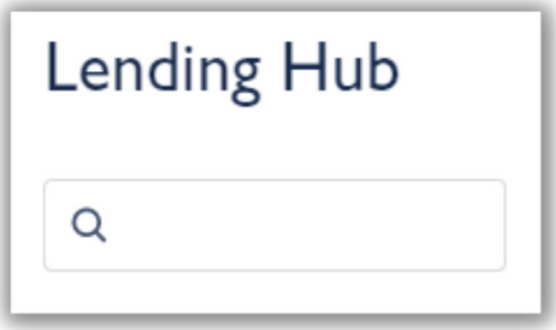
OTHER FEATURES

1. Download the lenders as a spreadsheet.



Simply click the "Export as CSV" button and your lenders will be exported to a downloadable pre-formatted spreadsheet that you can share with your broker.

2. LENDING HUB search function.



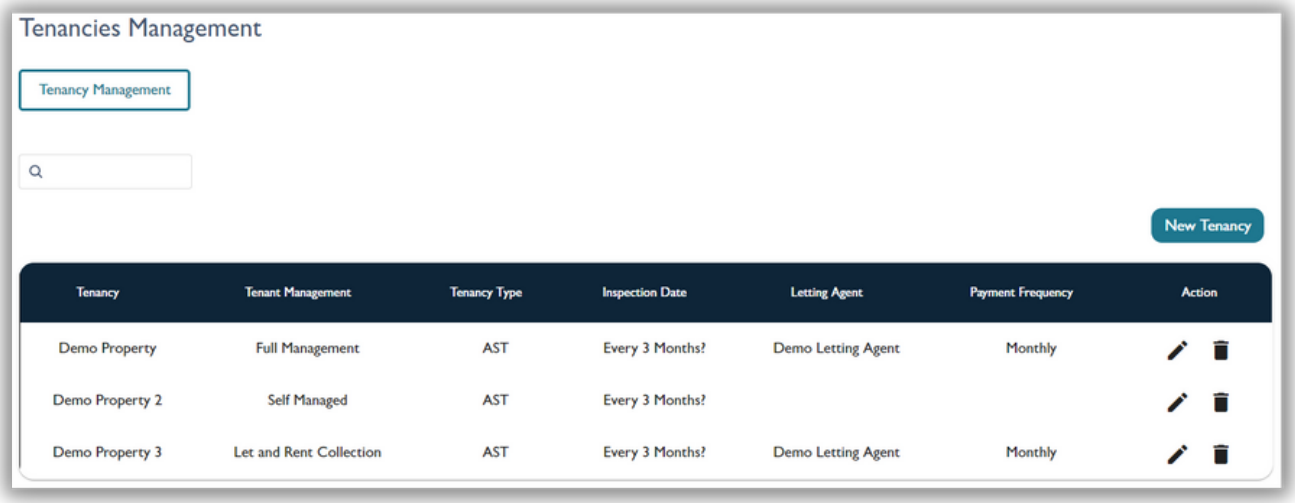
This search box will only look for lenders. Useful for large datasets that you will encounter as your portfolio grows.

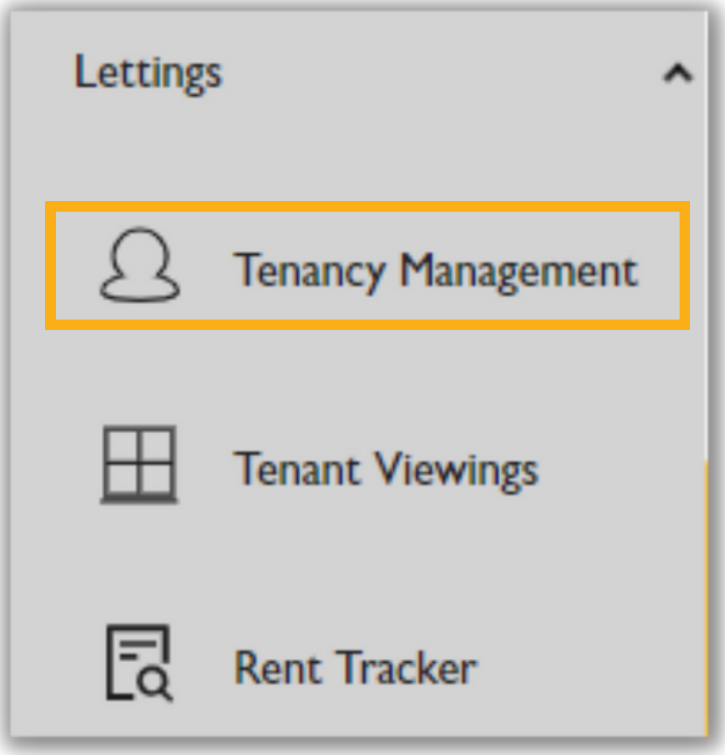
3. Bulk Import to LENDING HUB.

Please check the IMPORT/EXPORT Section of PIPELINE ADMIN.

TENANCY MANAGEMENT

You can track your tenancies in Property Store and yes, even HMOs. Property Store will help you from the tenant viewing process, onboarding process, and up to inspections of your lettings.

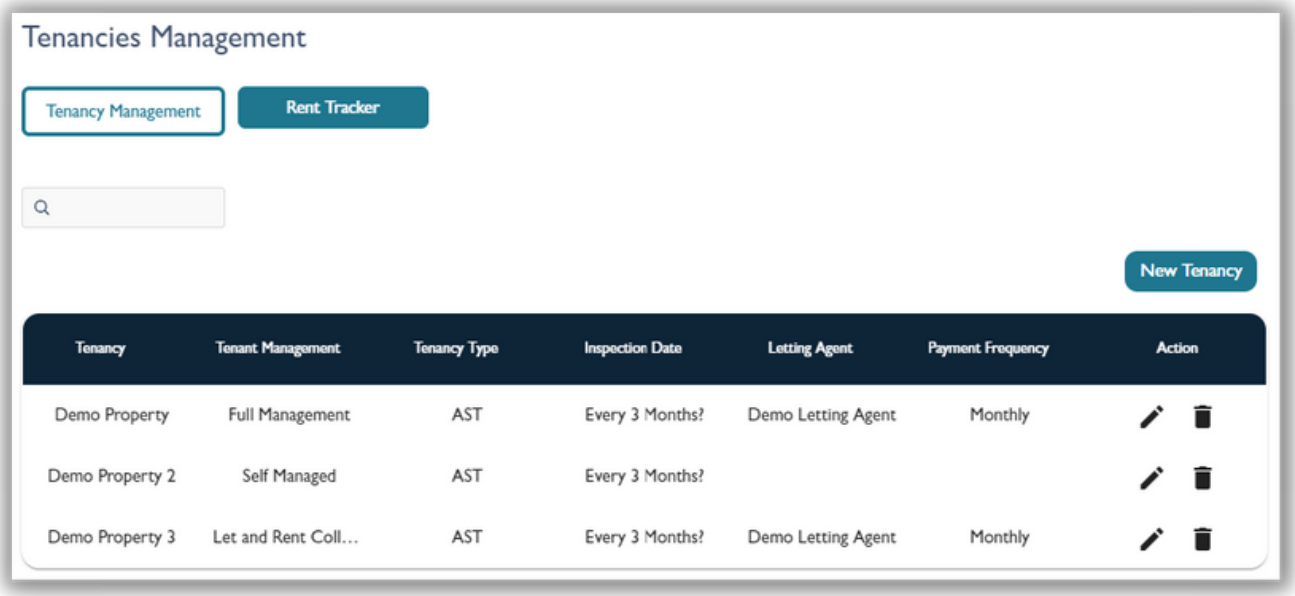




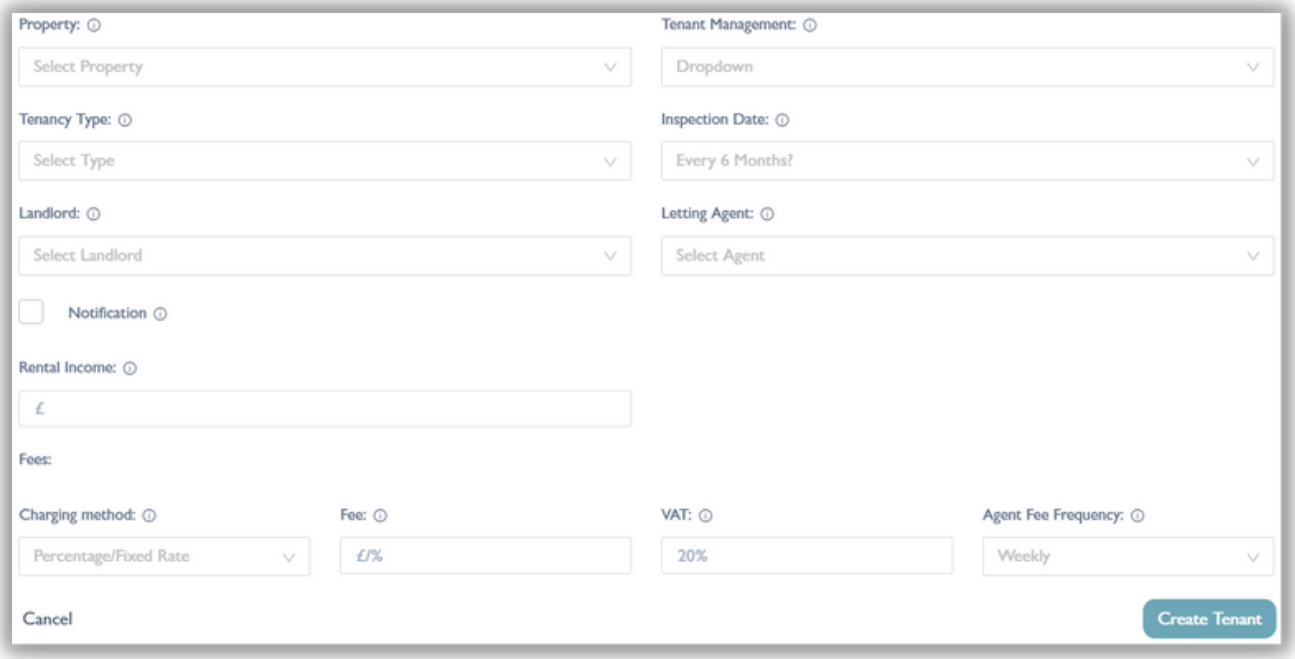
TENANCY MANAGEMENT can be found on the GRAY SIDEBAR under LETTINGS.

ADD TENANCY

1. Click the "New Tenancy" Button.



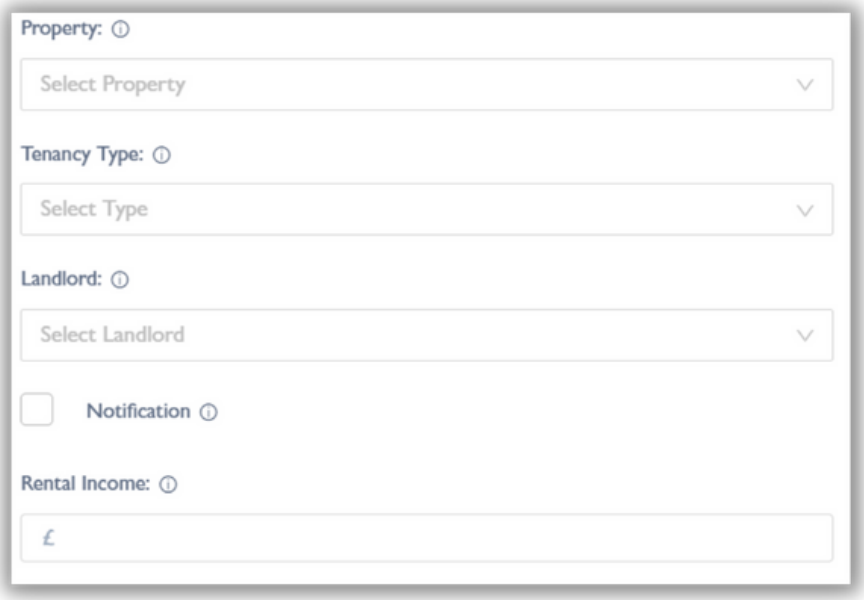
2. Fill in the NEW TENANT form.



Associate property so it shows up on the property details.

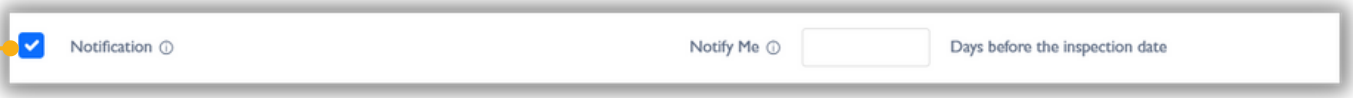
Allows you to choose from your contact list or generate a new contact on the spot.

Setting the net rental income will allow Property Store to calculate your finances in the Dashboard.

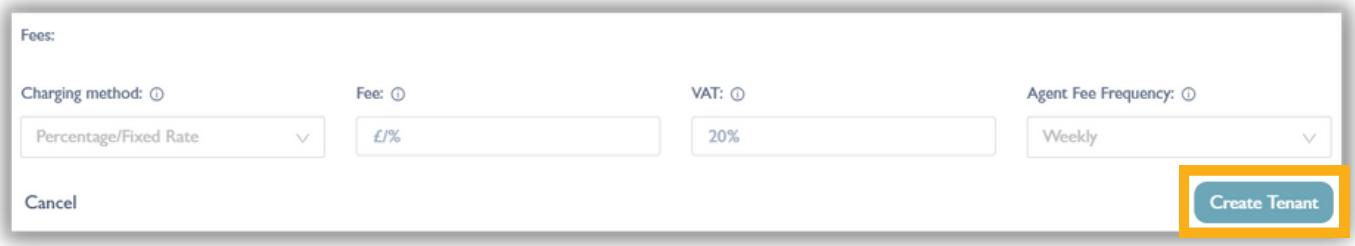


Choose if managed by you, by an agent, or both.

Similar to Landlord, you may choose from your contact list or generate a new contact



Ticking the "Notification" box and setting the number of days will allow Property Store to notify via email when inspection dates are coming up.

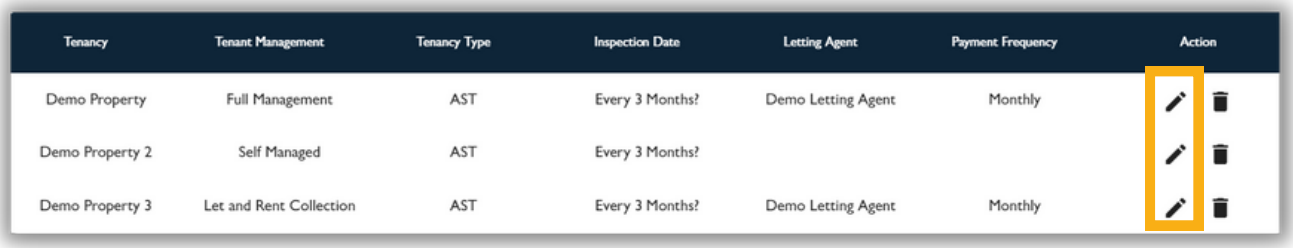


If the tenancy is managed by an agent, fees associated can be written in this section.

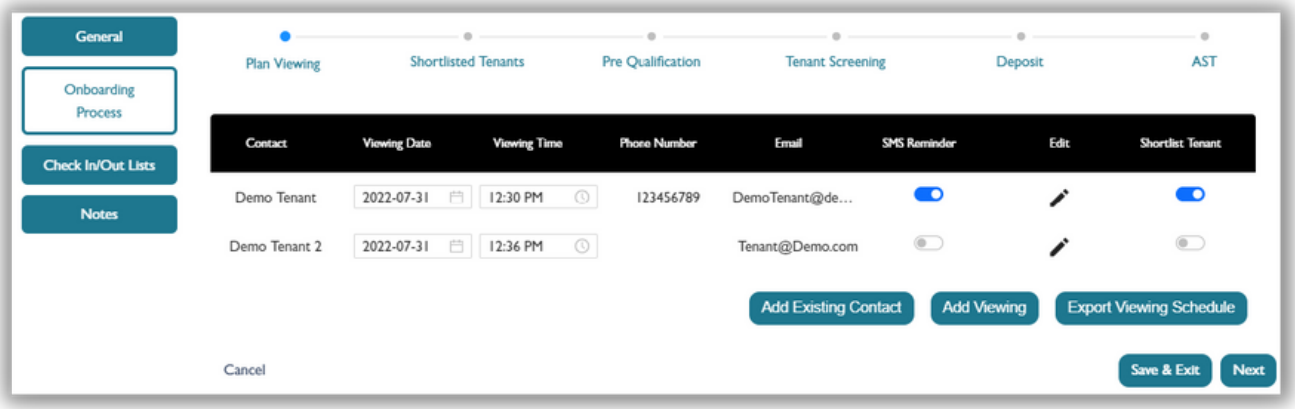
Click the "Create Tenant" button to finalize.

ONBOARDING

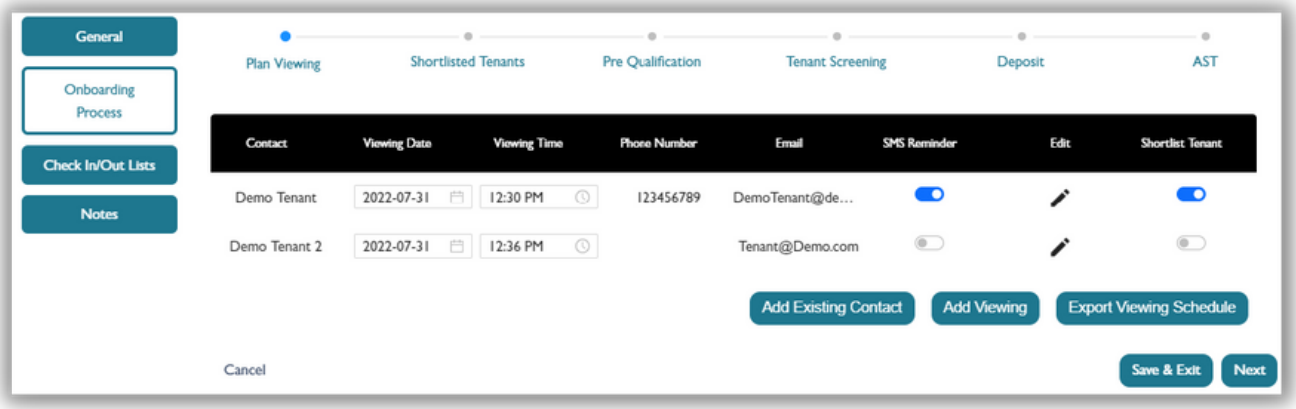
1. Click the Pencil Icon beside the Property.



2. Go to the Onboarding Process Tab.



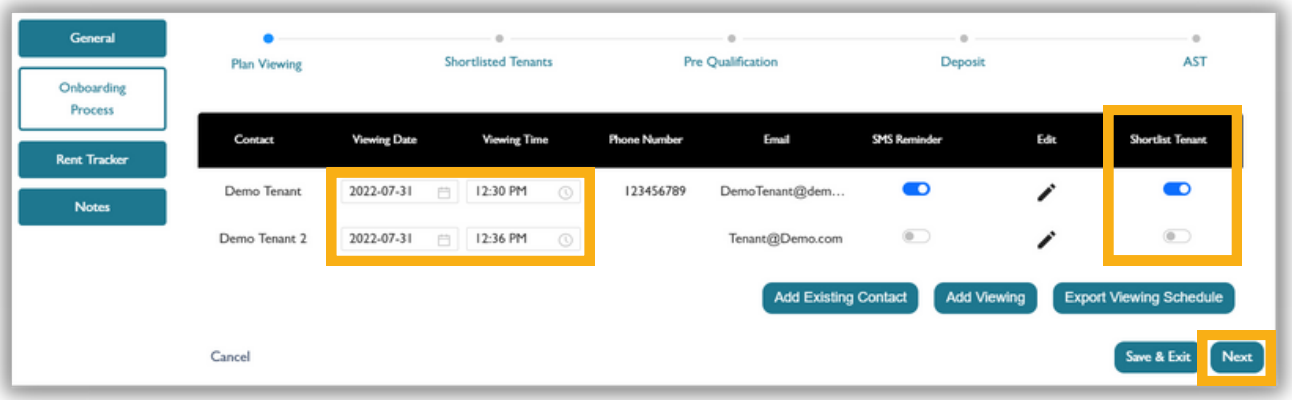
3. Accomplish the Plan Viewing Step.



If you have already created tenants, add them to the list by clicking the "Add Existing Contact" button. If not, click the "Add Viewing" button and the Create Contact form will show up for you to fill in.

Choose the tenant from the dropdown list as shown below and click the "Add Tenant" button.

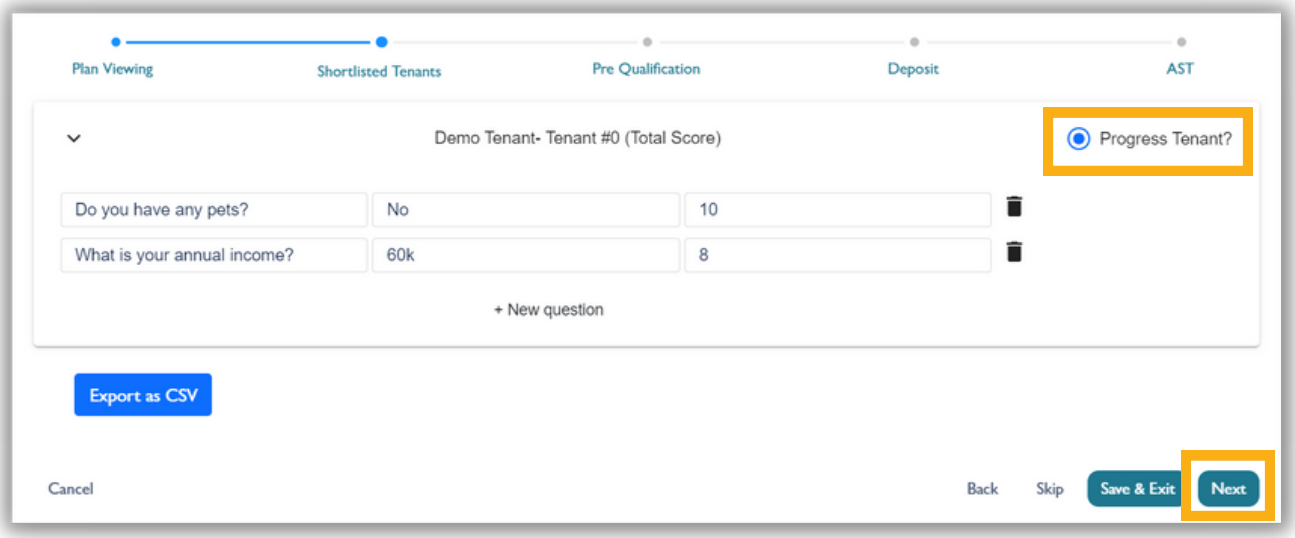
4. Arrange viewing and shortlist prospective tenants.



Setup the viewing appointment for each tenant. You may also set an SMS reminder to prevent your prospective tenants from forgetting the appointment. You may set the SMS template on the PIPELINE ADMIN.

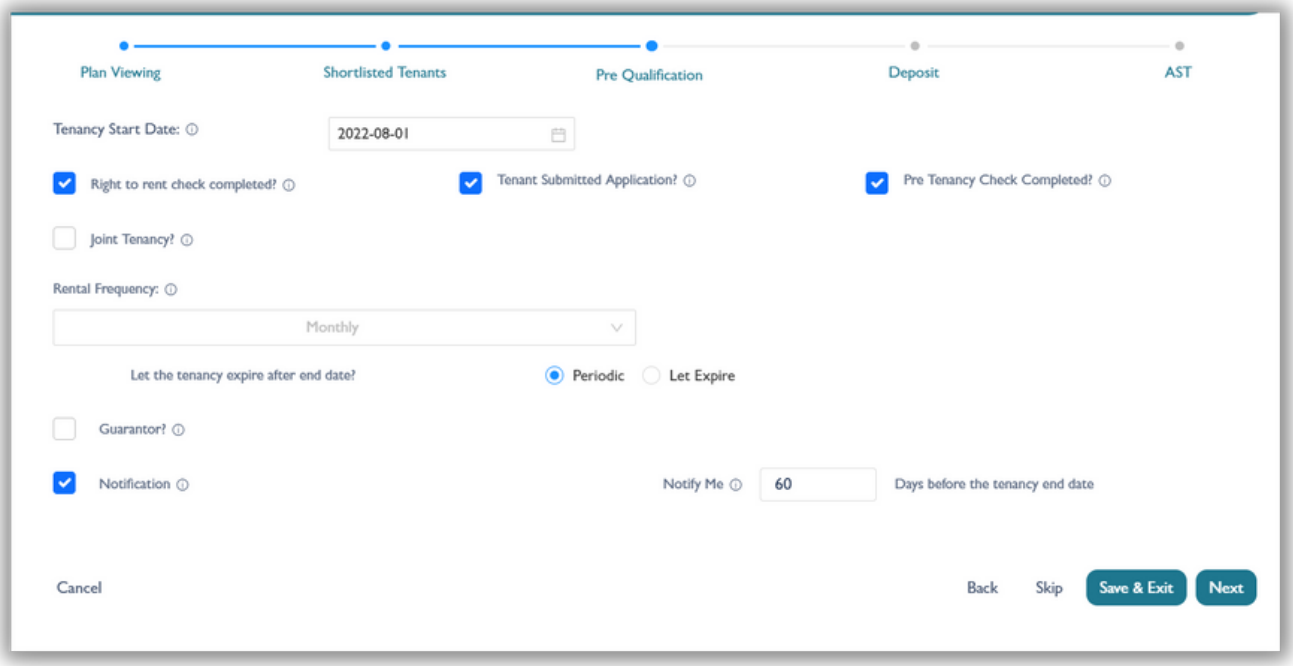
After viewing, shortlist your preferred tenant and click the "Next" button to proceed to the next step.

5. Accomplish the "Shortlisted Tenants" Step.



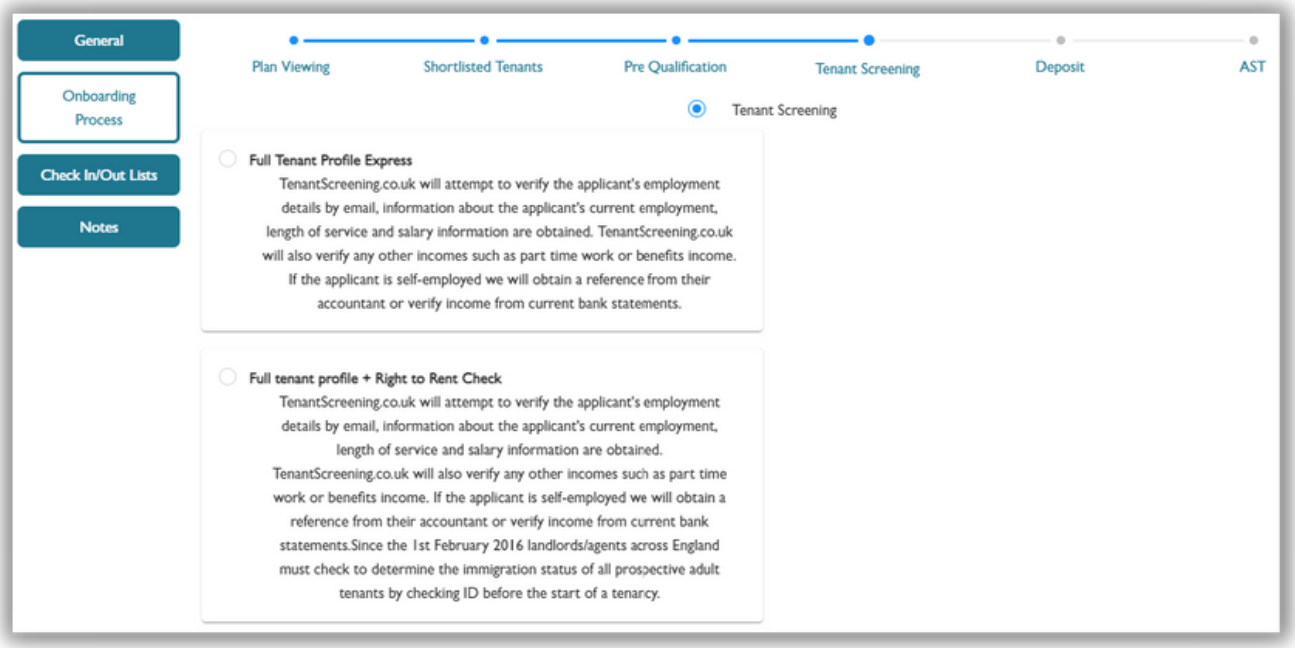
In this step, you may compile your interview questions for the candidate, jot down their answers, and rate their response out of 10 points. The scores will make it easier to compare the candidates. Tick the "Progress Tenant?" radio button if satisfied and click "Next" to proceed.

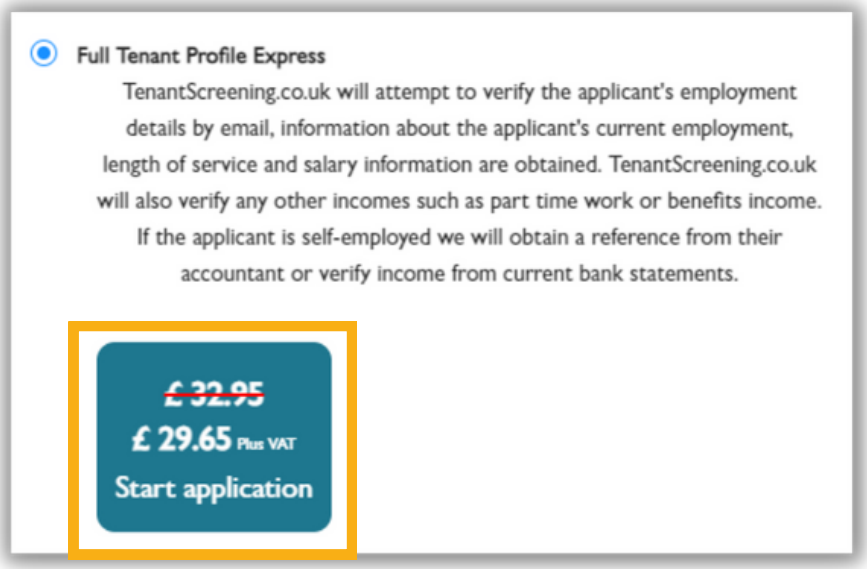
6. Accomplish the Pre-Qualification Step.



This step will serve as checklist for you to ensure the process goes smoothly. You may also set a notification when the tenancy is nearing its end. If its a joint tenancy, a new data fields will appear where you can fill in the names of the tenants. Similar to that, ticking the "Guarantor" tick box will open up a data field for the details of the Guarantor.

7. Accomplish the "Tenant Screening" Step.

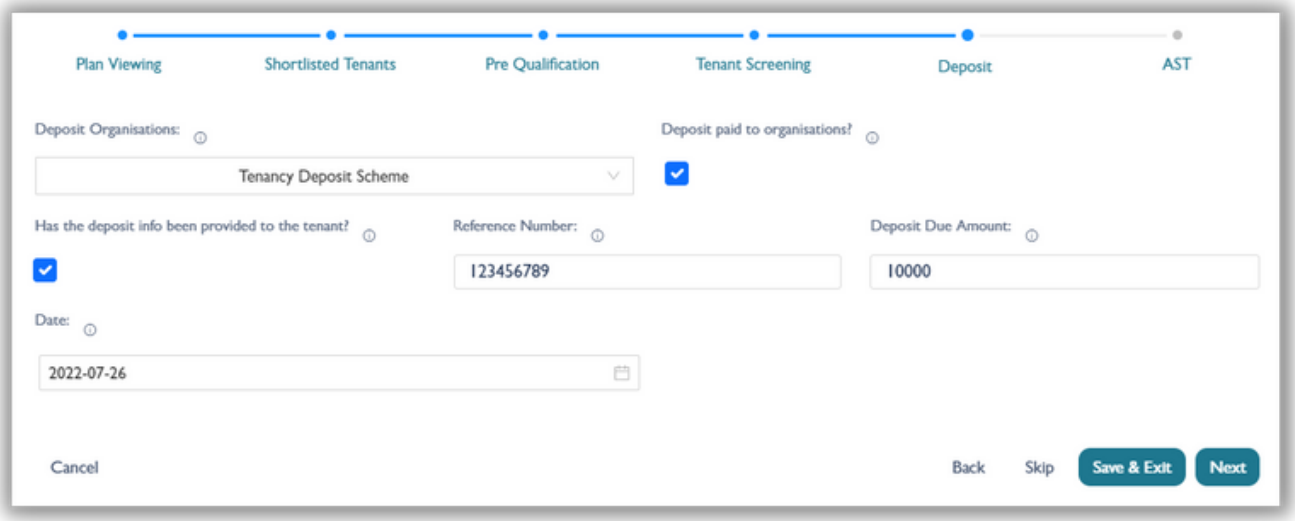




As a Property Store user, this is one of the exclusive discounts that you are eligible for. Upon choosing, you will receive a confirmation email on your registered email address.

Once satisfied, you may click the "Next" button again to proceed to the next step.

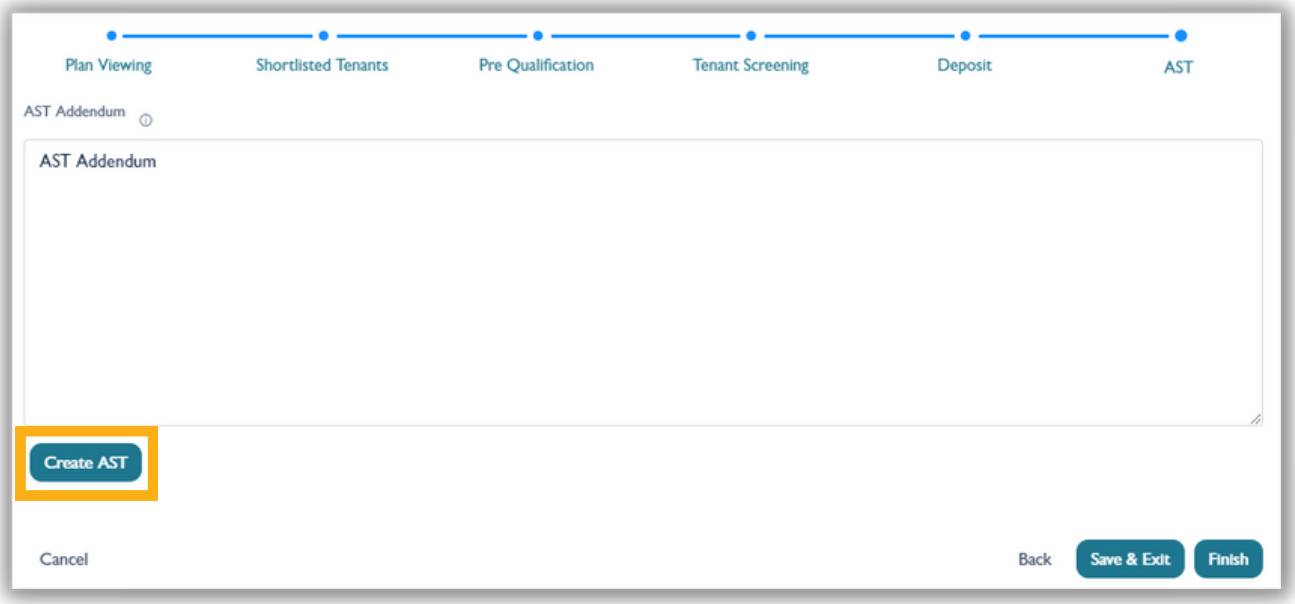
8. Accomplish the Deposit Step.



Similar to the previous steps, fill in and click the "Next" button to proceed.

9. Accomplish the AST Step.

If needed, you may use the Addendum box below. Once accomplished, click the "Create AST" button and agree to the terms. A pre-formatted pdf file will be downloaded with the details of the Addendum.

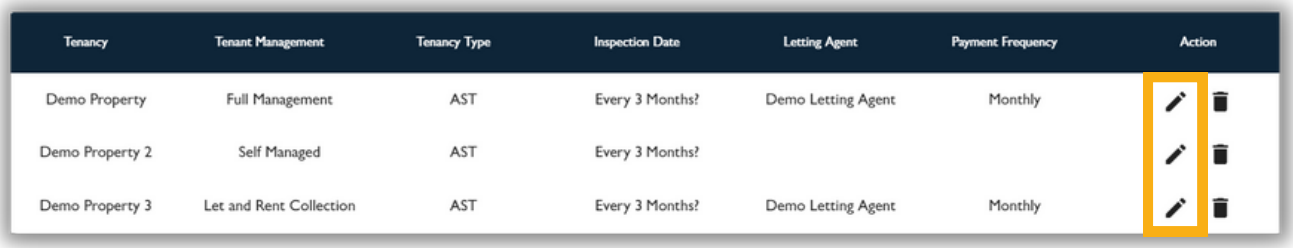


Click the "Finish" button to complete the Onboarding Process.

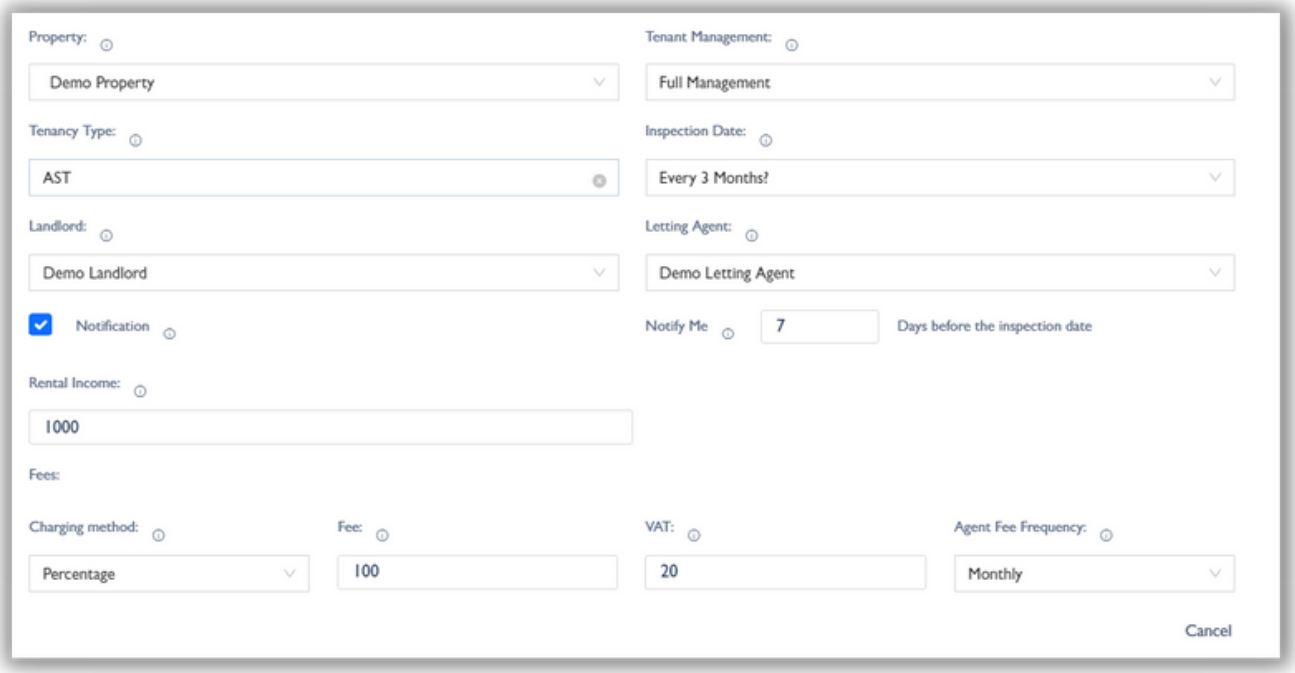
As you may have noticed, the "Save and Exit" button is available every step, which you can use to save the details and finish the process later.

EDIT TENANCY DETAILS

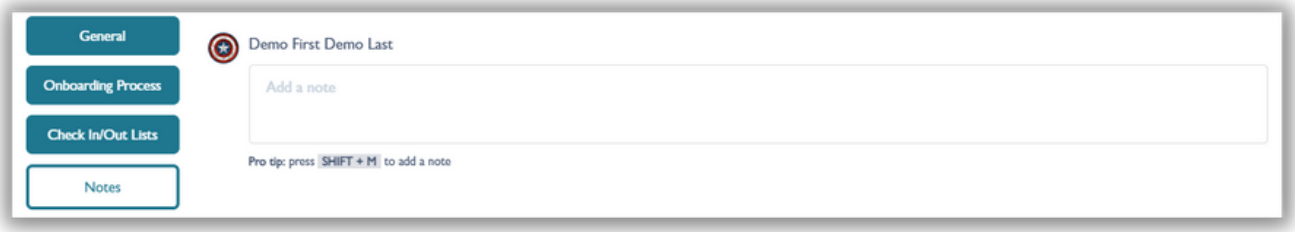
1. Click the Pencil Icon beside the chosen Property.



2. Edit any field in General Tab.



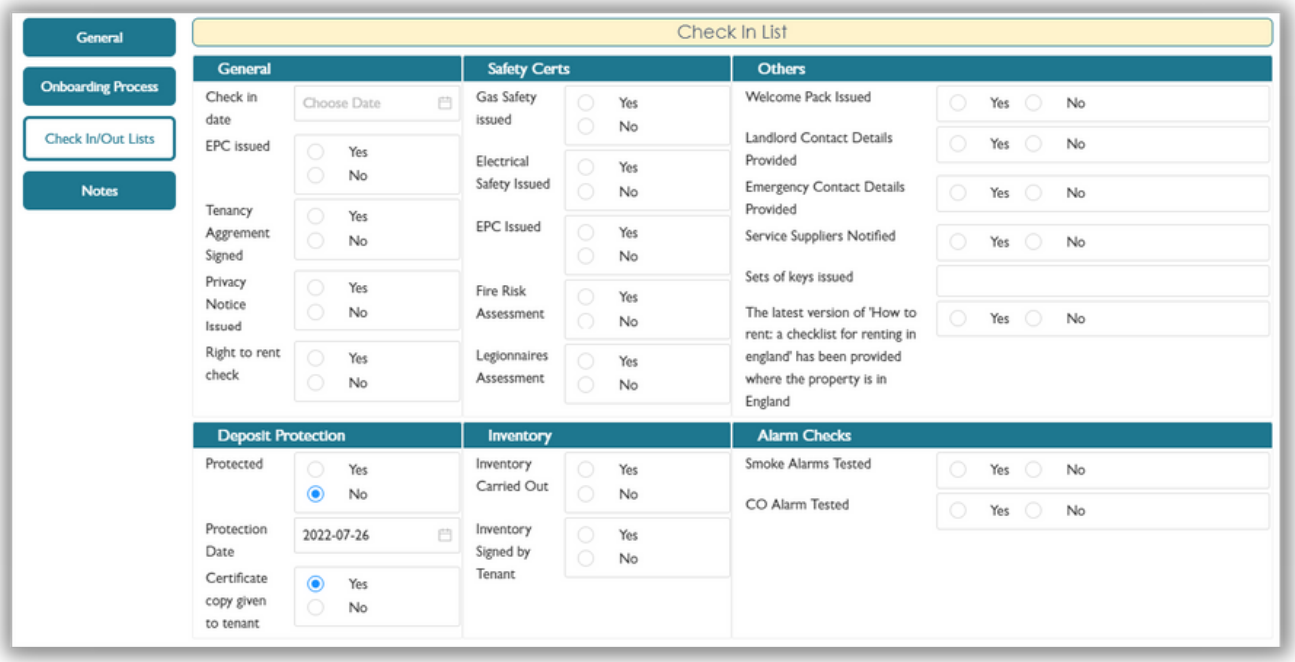
3. Add anything you want in the Notes Tab.

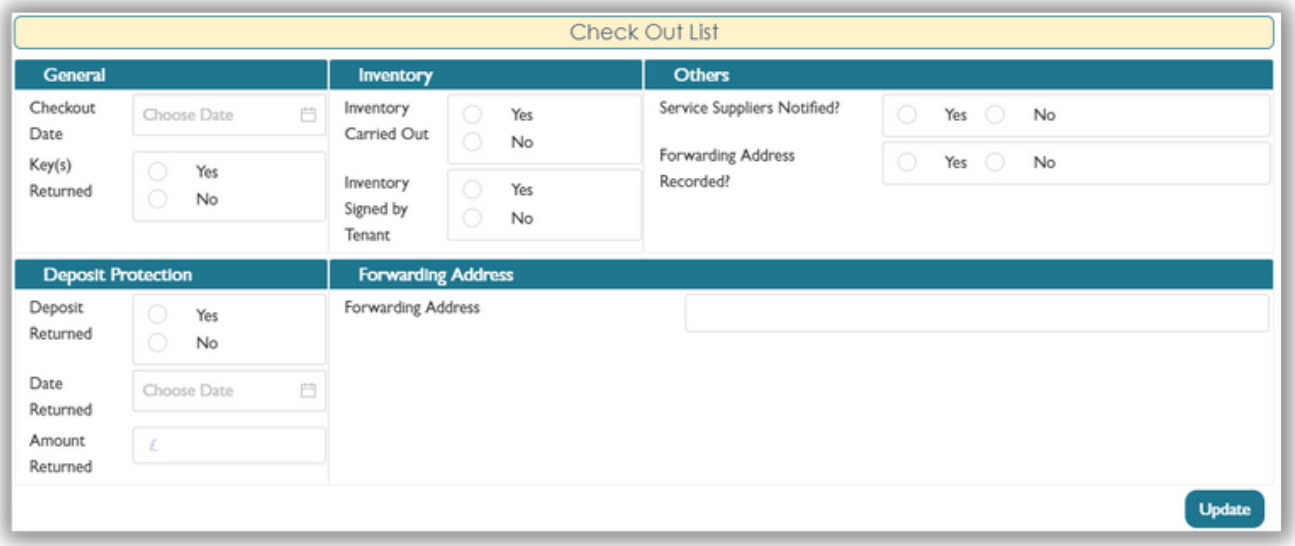


4. Onboarding Process Tab.

For the Onboarding Process, please check them on their respective Sections.

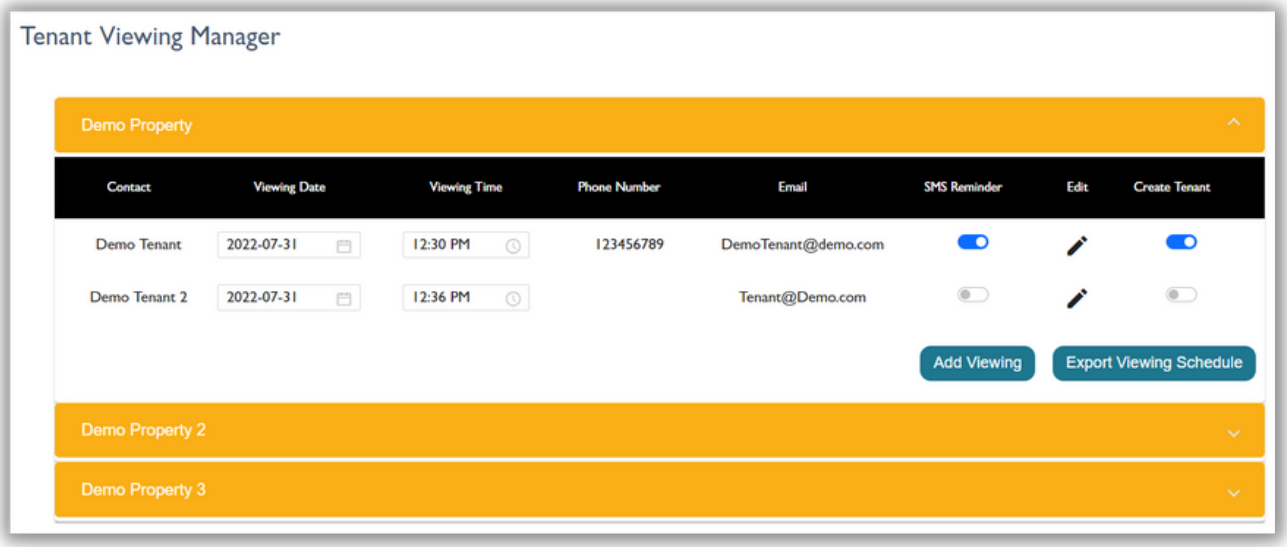
5. Accomplish the Check In/Out Lists

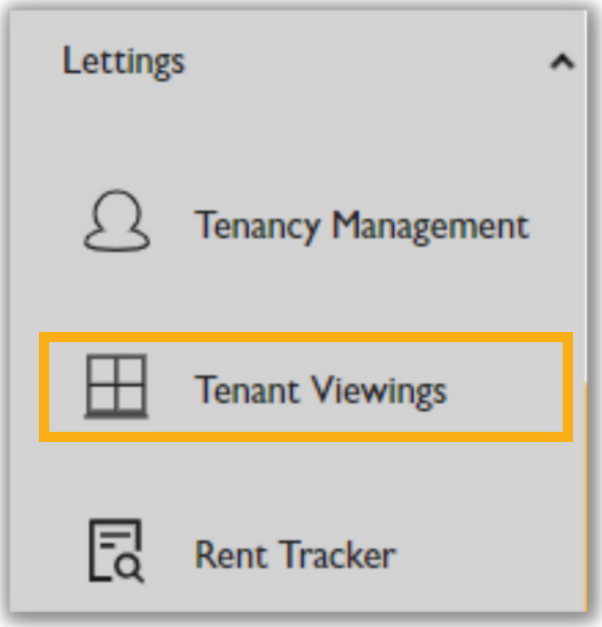




TENANT VIEWING MANAGER

Similar to PROPERTY VIEWING MANAGER, you can also manage tenant viewing appointments in Property Store. You can also set SMS reminders to prevent last-minute cancellations due to the tenants forgetting the appointment.

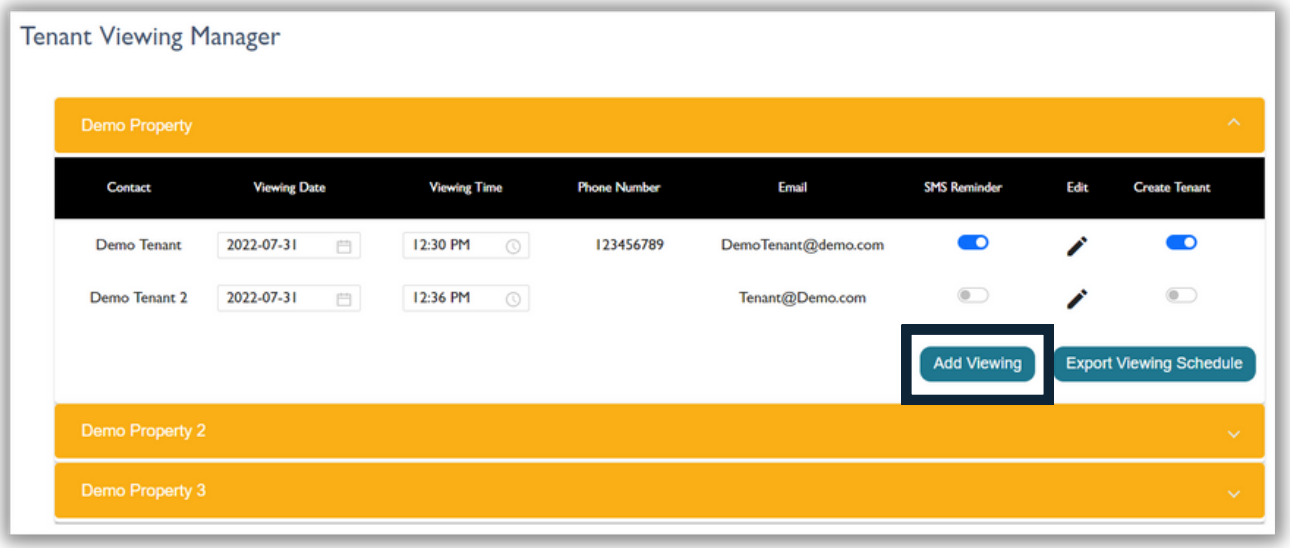




TENANT VIEWINGS can be found on the GRAY SIDEBAR under LETTINGS.

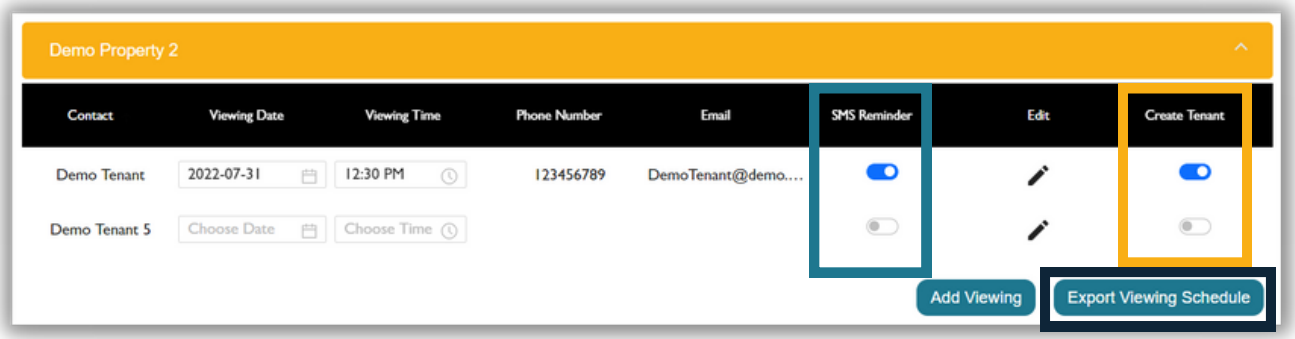
MANAGE VIEWINGS

1. Click the "Add Viewing" Button.



2. Fill in the details of the tenant on the Form.

3. Arrange the viewing appointment.

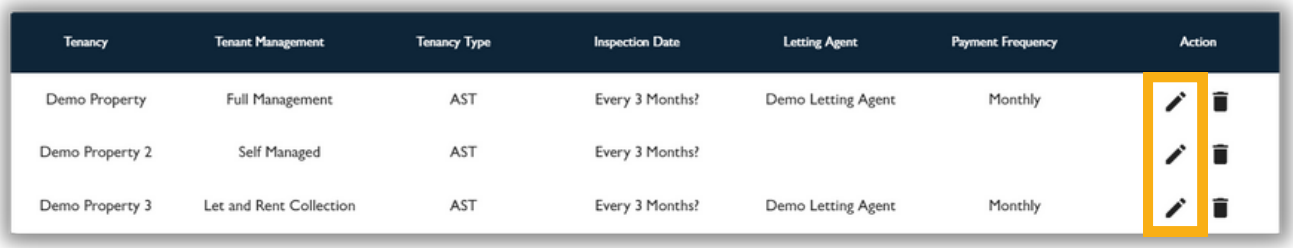


You may also set an SMS reminder by clicking on the slider. You will need to fill in the phone number of your tenant. Clicking the "Create Tenant" slider beside the tenant will qualify that tenant towards the "Shortlisted Tenants" Step of the onboarding process.

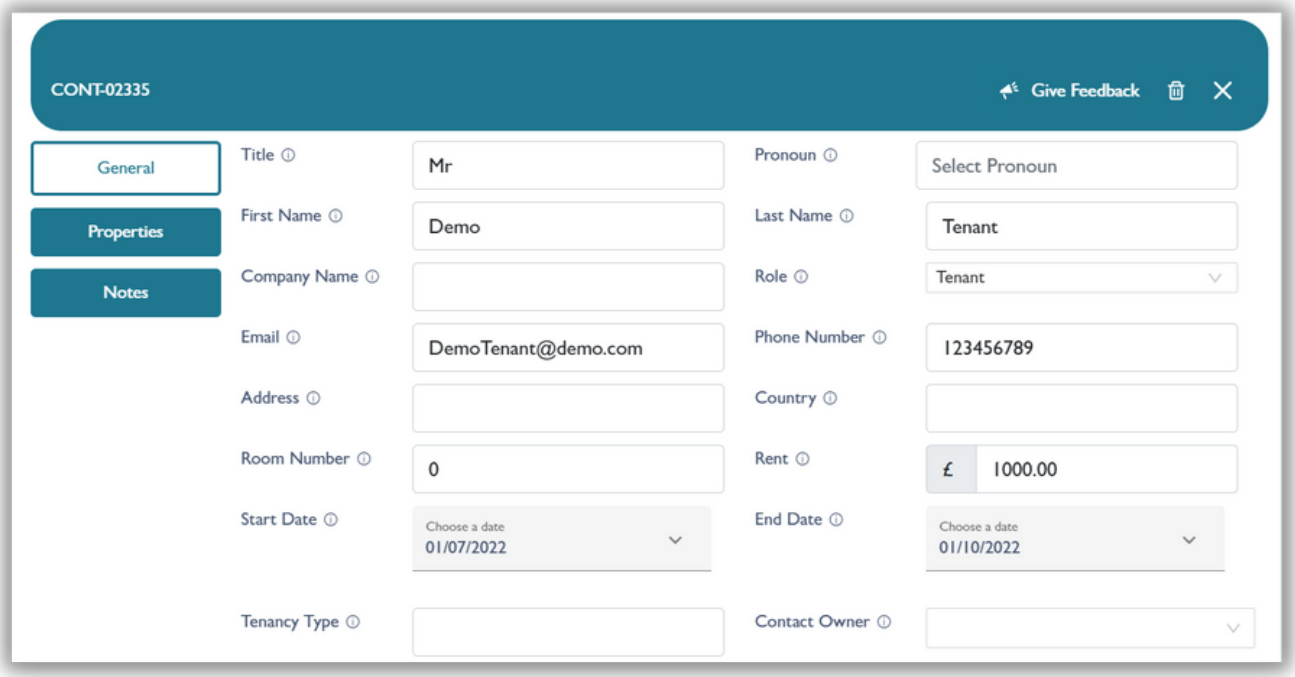
You may download the schedule by clicking the "Export Viewing Scheduled". You will be given a pre-formatted spreadsheet that you may open using any spreadsheet application.

EDIT TENANT DETAILS

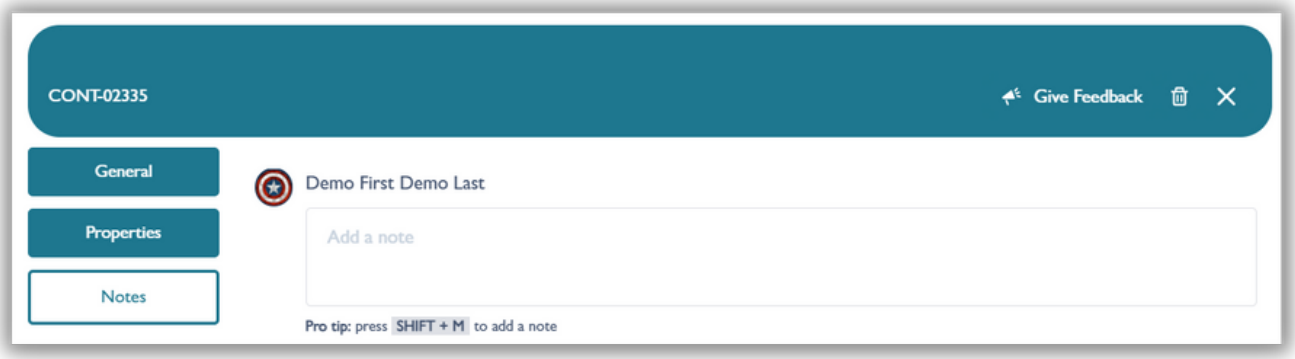
1. Click the Pencil Icon beside the chosen Property.



2. Edit any field in General Tab.

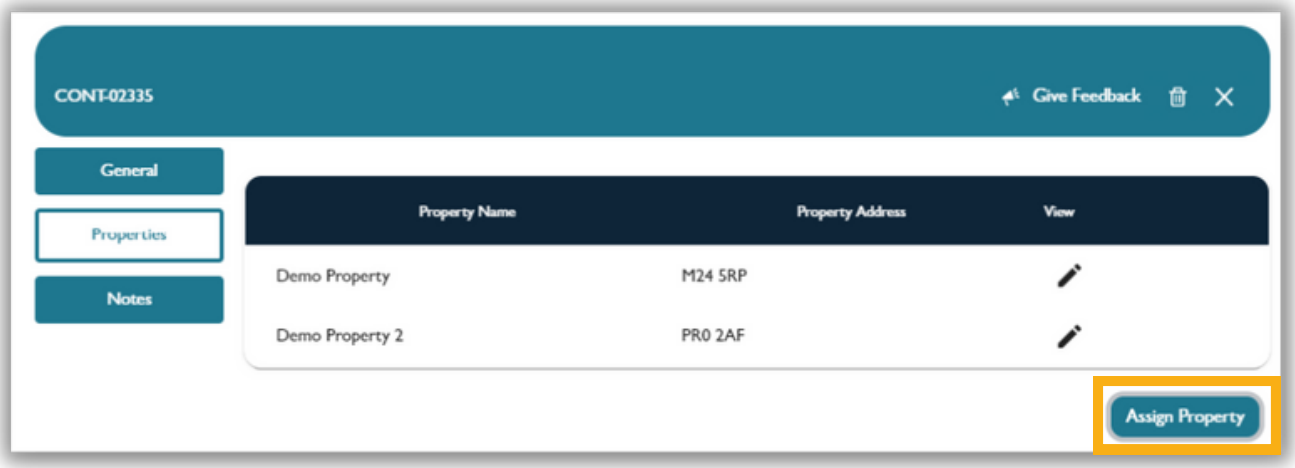


3. Edit anything in the Notes Tab.

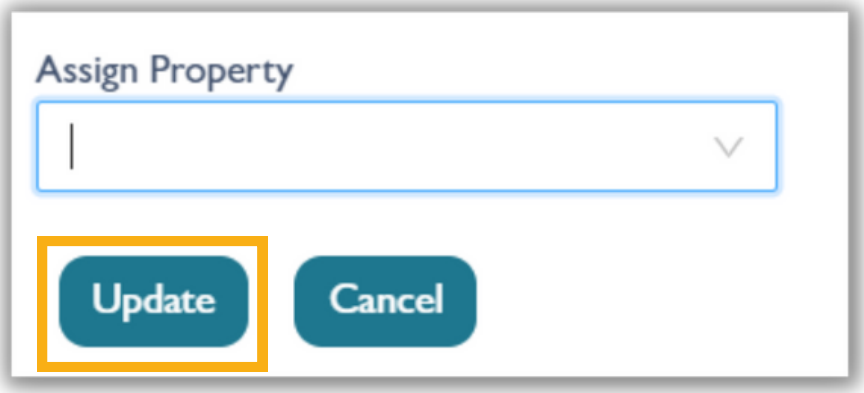


Similar to the other notes, URL added are clickable and would open that link on a new tab.

4. Reassign tenant to a different Property.

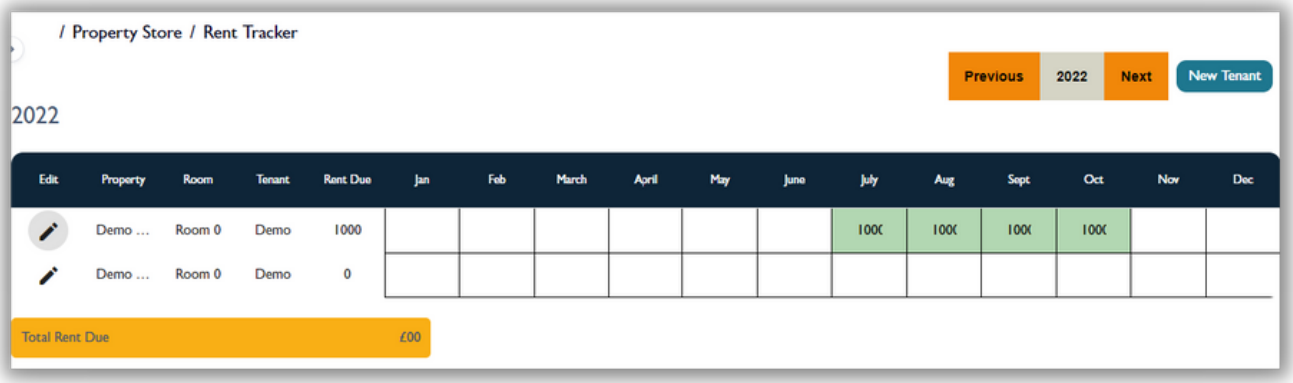


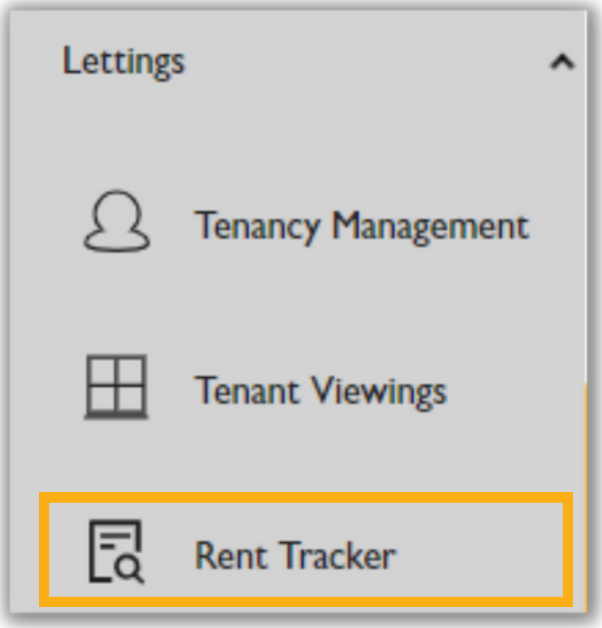
You may click the "Assign Property" button so that you may reassign your tenant to a different property in case that situation occurs. The Assign Property Form will show and simply find the new property for your tenant in the dropdown list and click the "Update" button to finalize changes.



RENT TRACKER

Here is where you can manage the rent of your tenants so you don't have to remember all of them. Property Store will remind you via notifications when the rent is due which frees up more time for you.

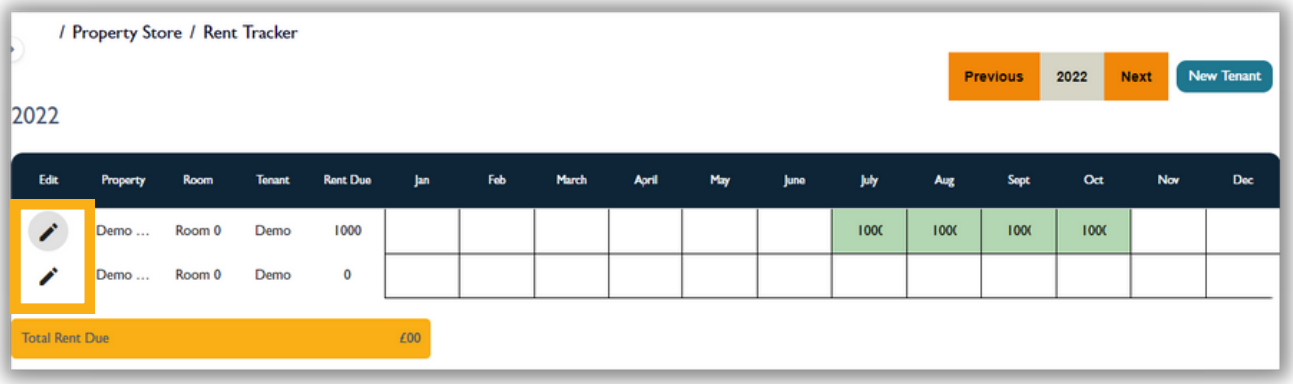




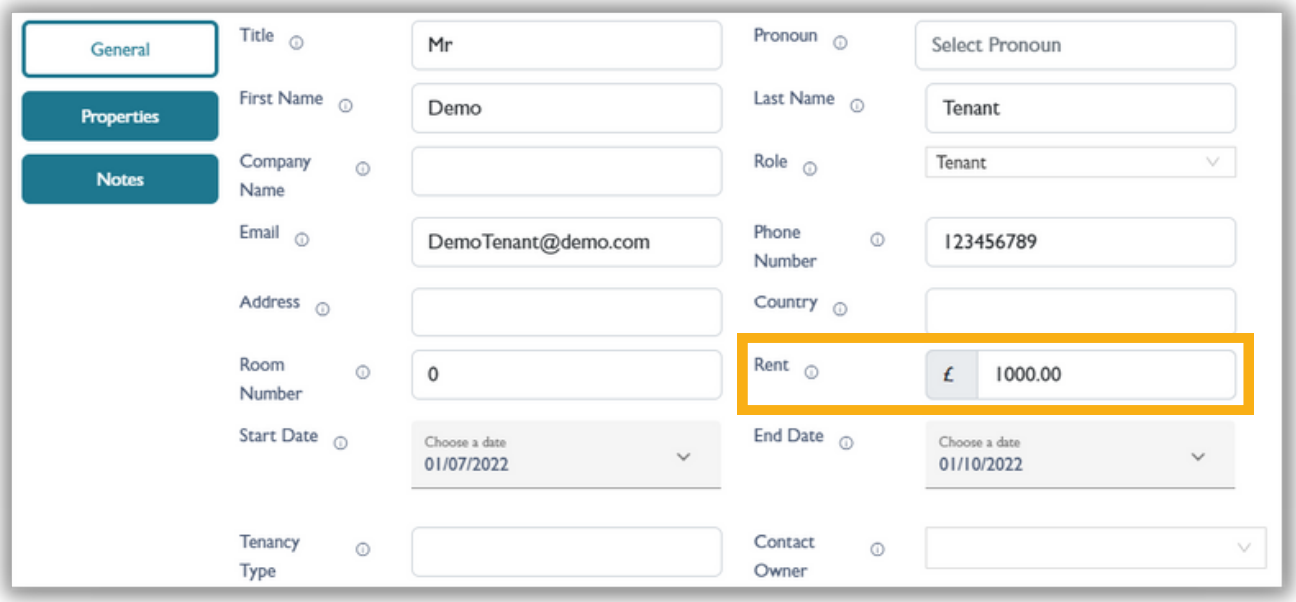
RENT TRACKER can be found on the GRAY SIDEBAR under LETTINGS.

TRACKING RENT

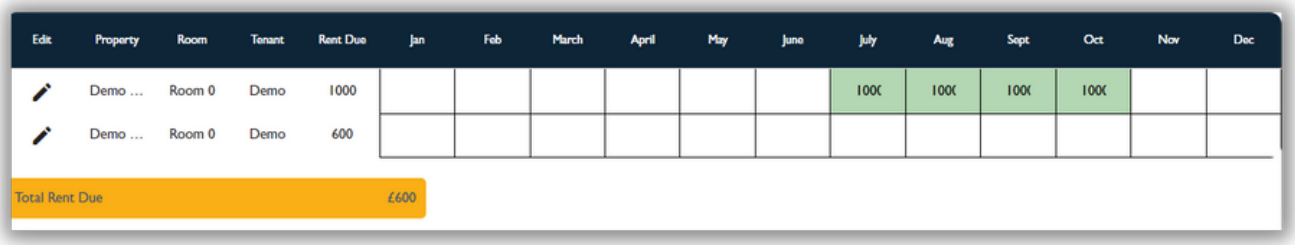
1. Set the monthly rent of your tenant.



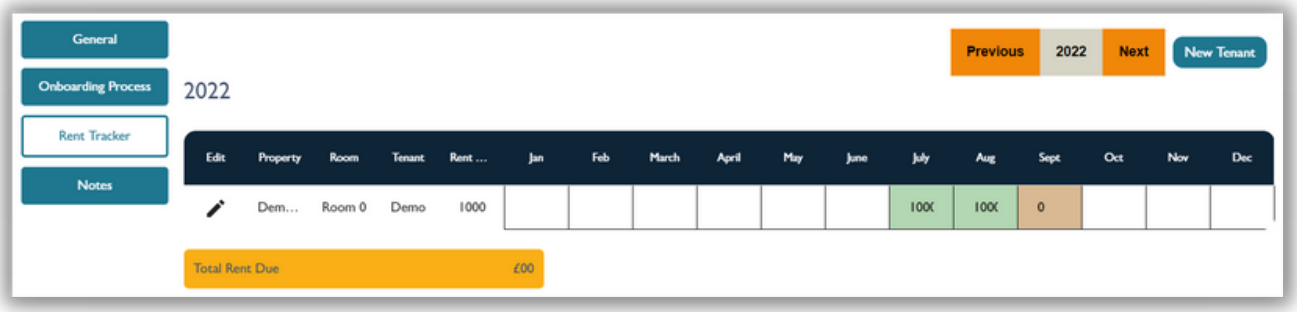
Click the Pencil Icon beside the chosen tenant.



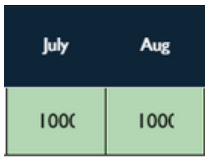
Edit the tenant's rent as shown above. With this, Property Store will be able to track your rentals and would notify you when it's due.



If your tenant was able to pay in full, simply double click the Light Brown box and the system will input the nominal rent for that month. For partial payment, you may type in the actual payment for that month.



After successfully onboarding a tenant, the Rent Tracker will make it easier for you to monitor rent payments by showing you if the rent is due. It will also assist you in monitoring unpaid months.

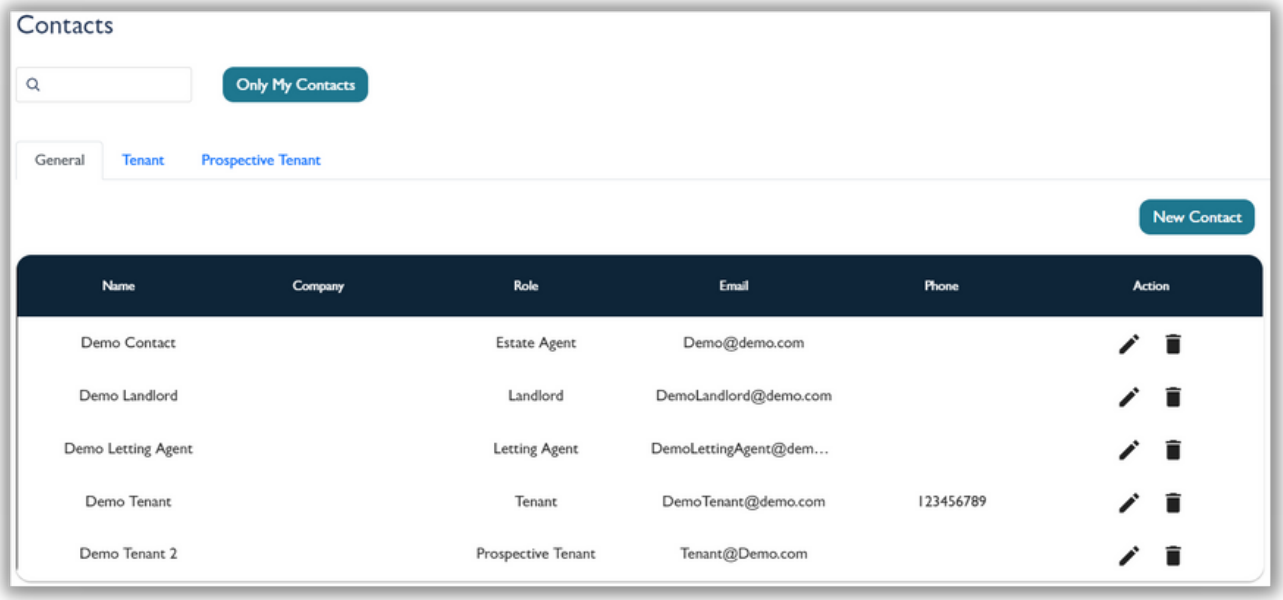


Green indicates the rent has been collected.

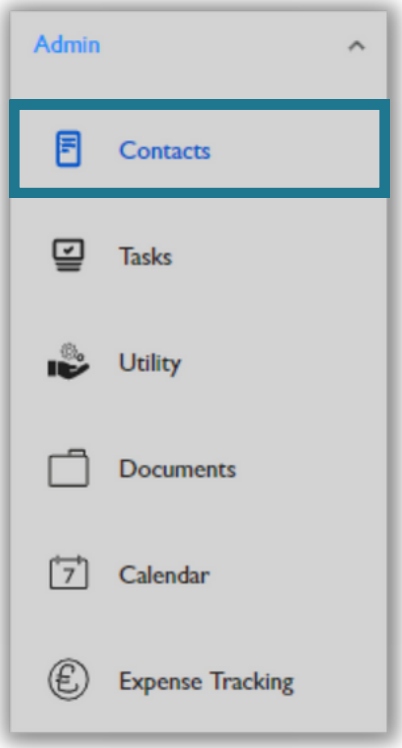
Light brown indicates the rent has not been collected. The last brown month is the month when the tenancy ends.

CONTACTS

You can create and store your contacts in Property Store. This will make it easier for you to do everything in Property Store instead of checking your phonebook every time you need the details of your team.

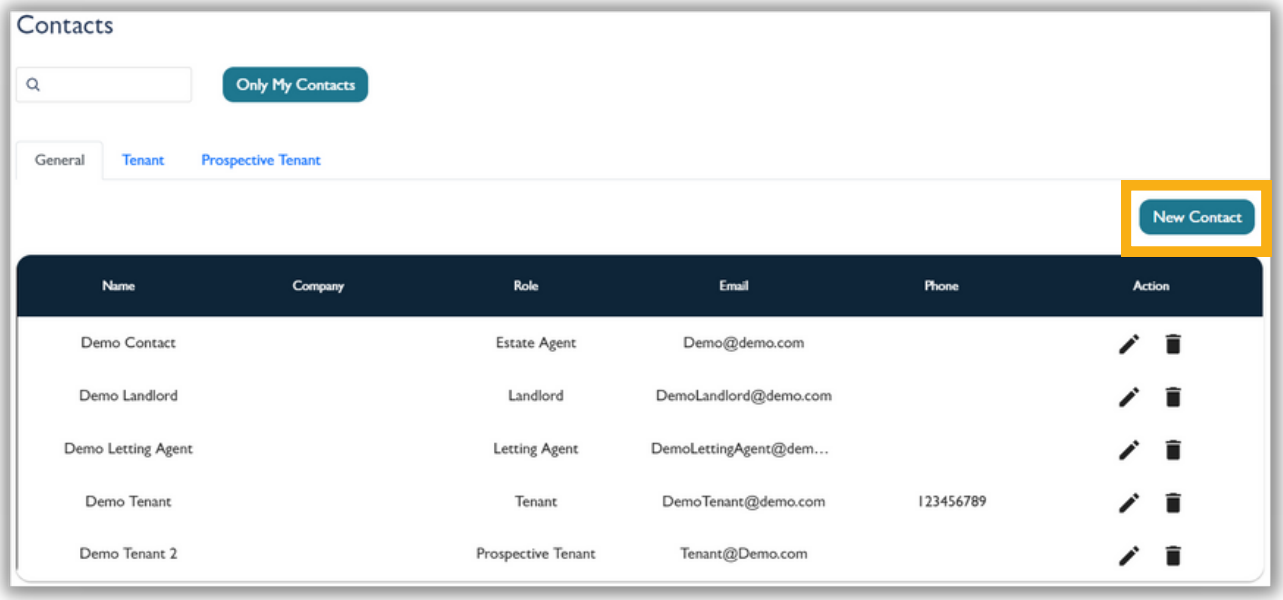


CONTACTS can be found on the GRAY SIDEBAR under ADMIN.



CREATE CONTACT

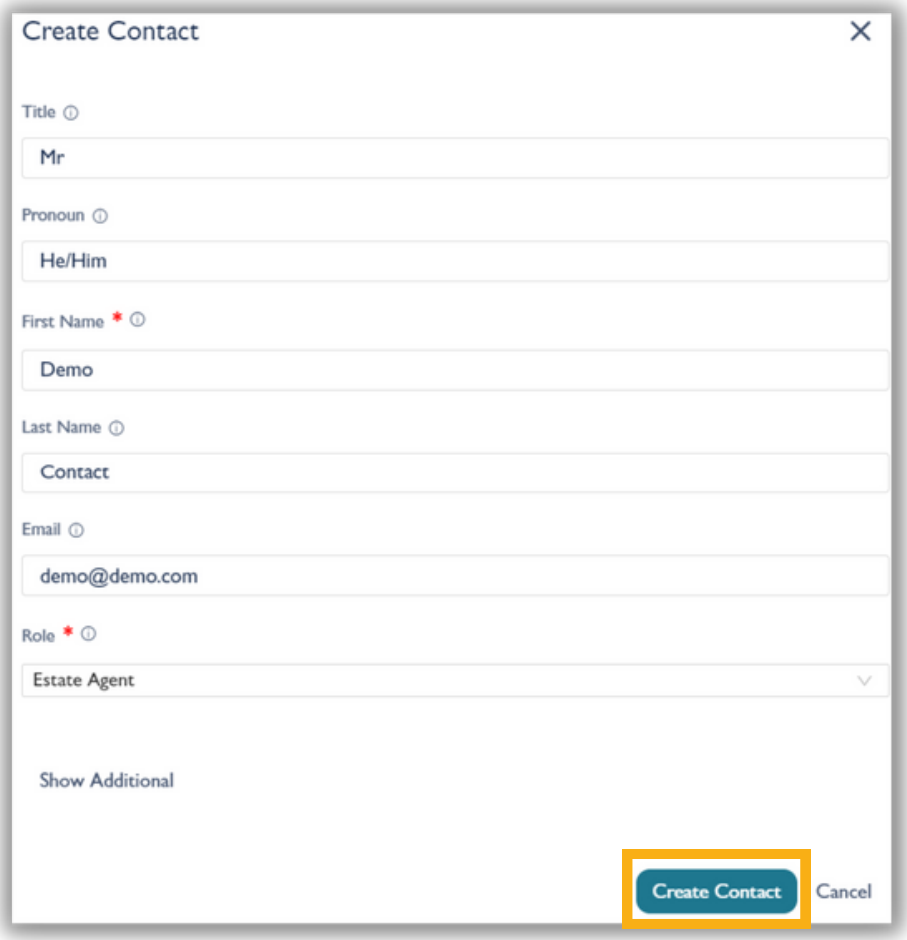
1. Click the CREATE CONTACT button.



You may also click the CONTACT Icon on the Orange Sidebar.

2. Fill in the CREATE CONTACT Form.

Custom pronouns can be added here by choosing "Other"



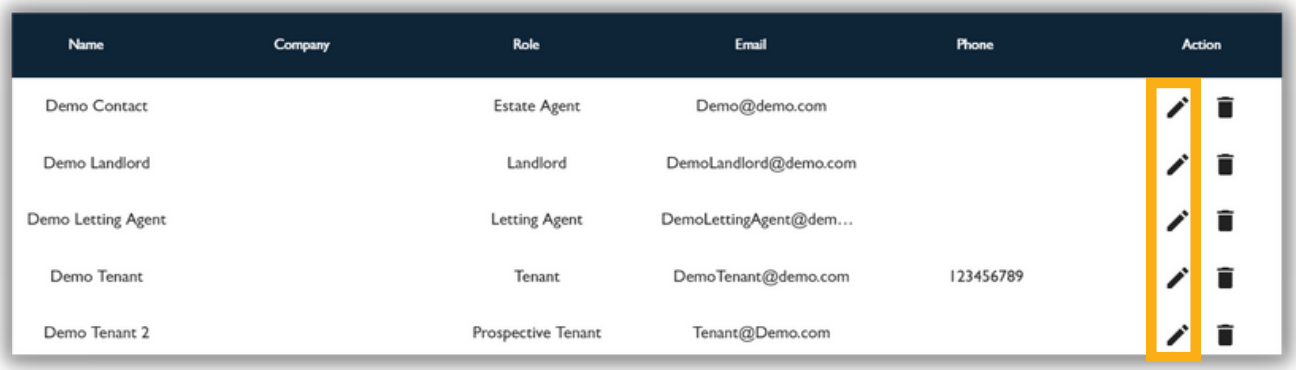
Additional options may pop up for specific roles such as contractors

Clicking "Show Additional" will reveal other details to be filled if needed.

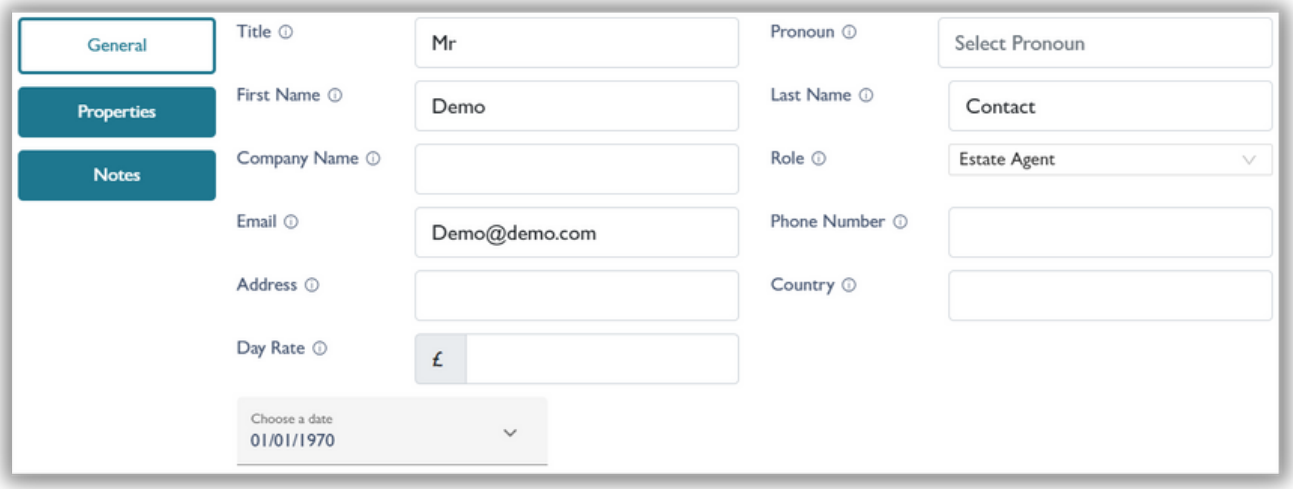
Clicking the "Create Contact" button will add the details to your list, which can be found on the CONTACT feature as shown below:

EDIT CONTACT

1. Click the Pencil Icon beside the chosen Contact.



General Tab

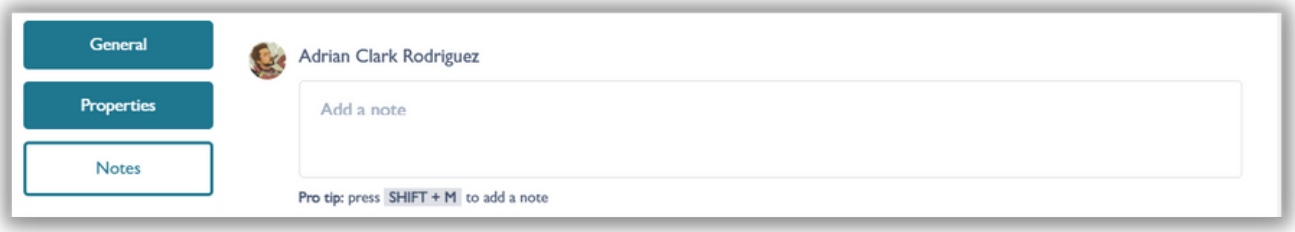


One of the most important detail of your contact is their roles. Roles such as Tenants would have different functions such as placing them on the onboarding process of the Tenancy features of Property Store. Some roles would show up more options such as Contractors.

Properties Tab

Assigning a property to a contact would make it much convenient for you to trace which property your contact is associated to and would make cooperation with multiple teams much easier. You can also assign tenants to a Property here.

Notes Tab

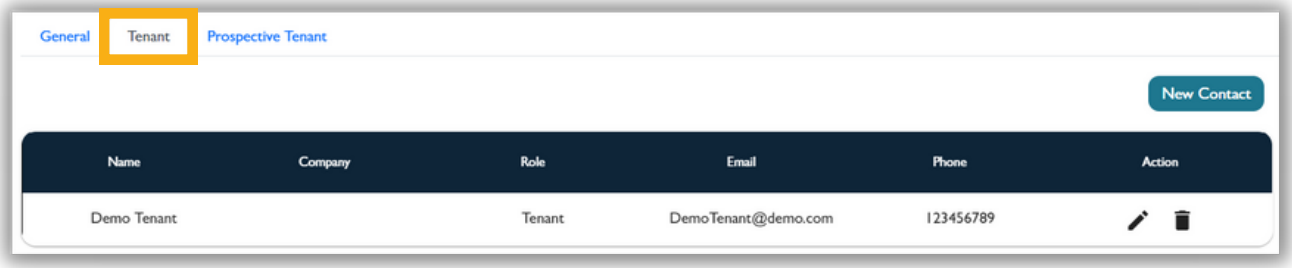


Similar to the other notes, URL added are clickable and would open that link on a new tab.

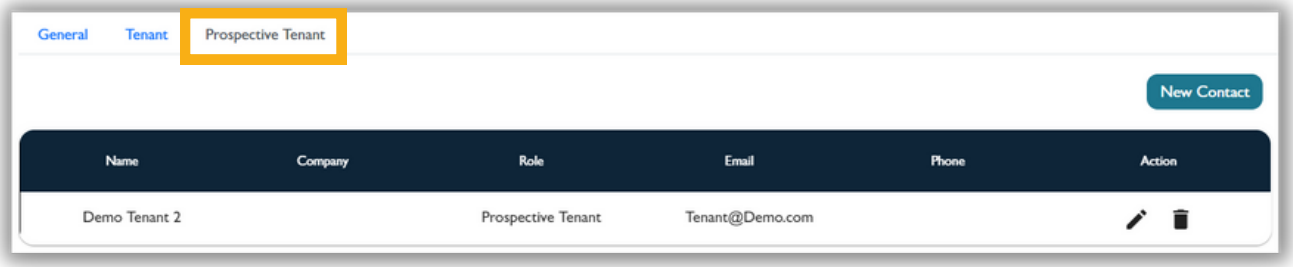
OTHER FEATURES

1. Shortlisted Tenants are separated from the others.

Tenants Tab

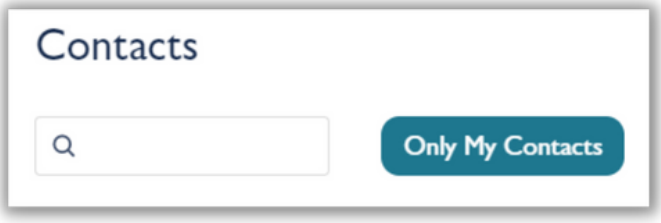


Prospective Tenant Tab



While contacts tagged as Tenants are listed on the General Tab, they are separated and can be found on the Tenant Tab. Furthermore, tenants that were shortlisted on the Onboarding Process feature of Tenancy Management are further filtered and have their own place on the Prospective Tenant Tab.

2. CONTACTS search function.

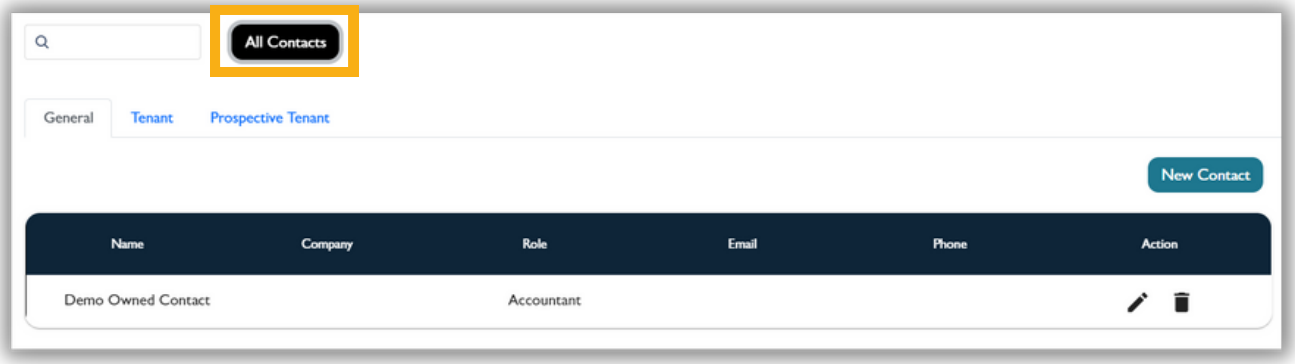


Similar to the Project search function, this search box will only look for CONTACTS.

Only My Contacts

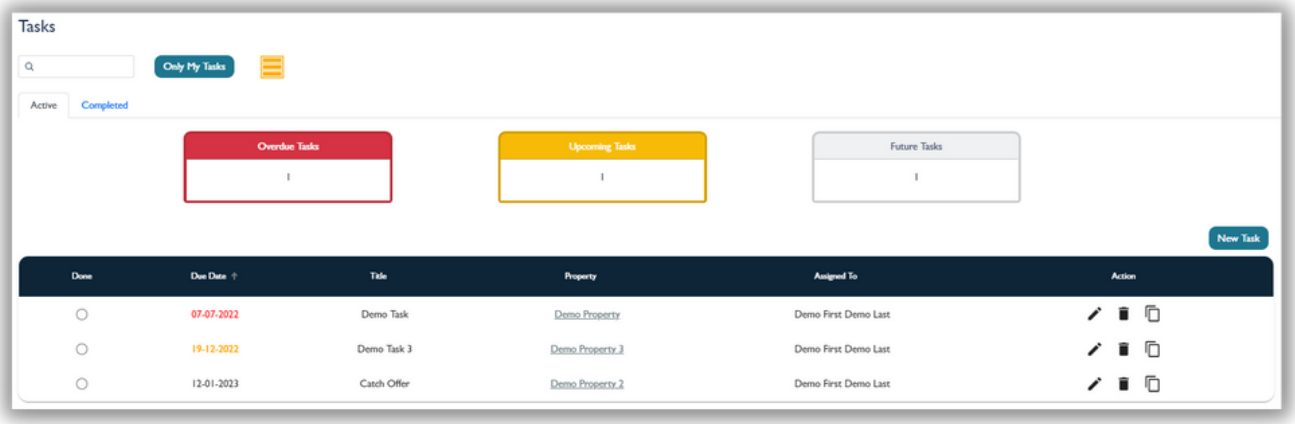
The "Only My Contacts" button will only look for CONTACTS that were assigned to you via the "Contact Owner" detail in the CREATE CONTACT Form. This can only be seen if the additional options are revealed. Sample is shown below:

Simply click the "All Contacts" button show all your contacts again.

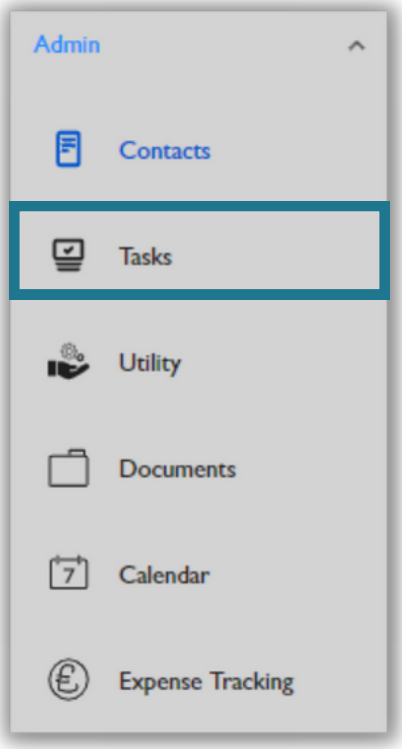


TASKS

TASKS is meant for chasing up offers or chasing up direct to vendor letters or anything that you need to do in your day-to-day work. You can associate TASKS to your contacts and property. You can also set due dates so that Property Store can send you a notification when a TASK is due.

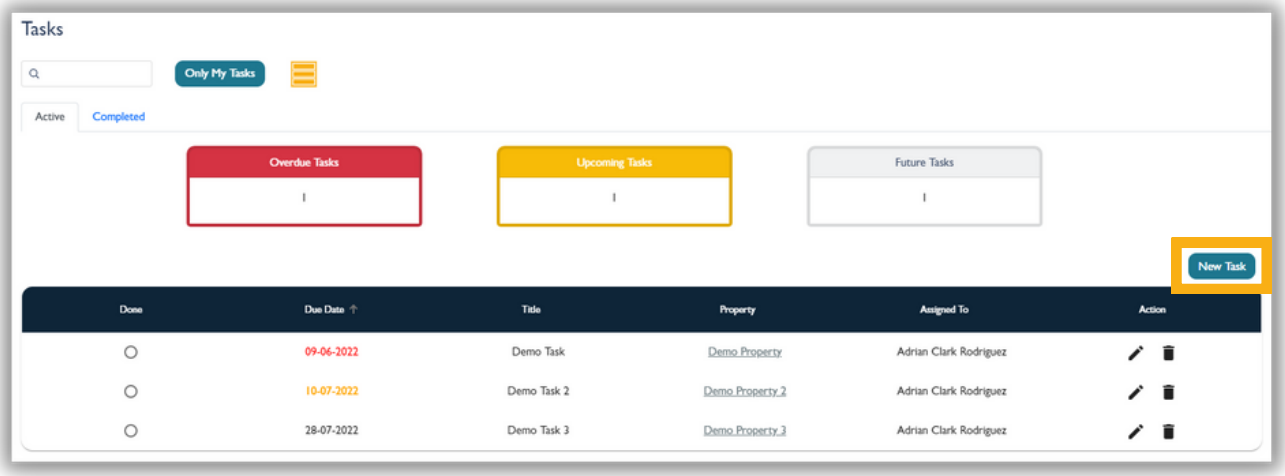


TASKS can be found on the GRAY SIDEBAR under ADMIN.



CREATE TASKS

1. Click the "New Task" Button.



You may also click the TASK Icon on the Orange Sidebar.

2. Fill in the CREATE TASK form.

Set to receive an email reminder.

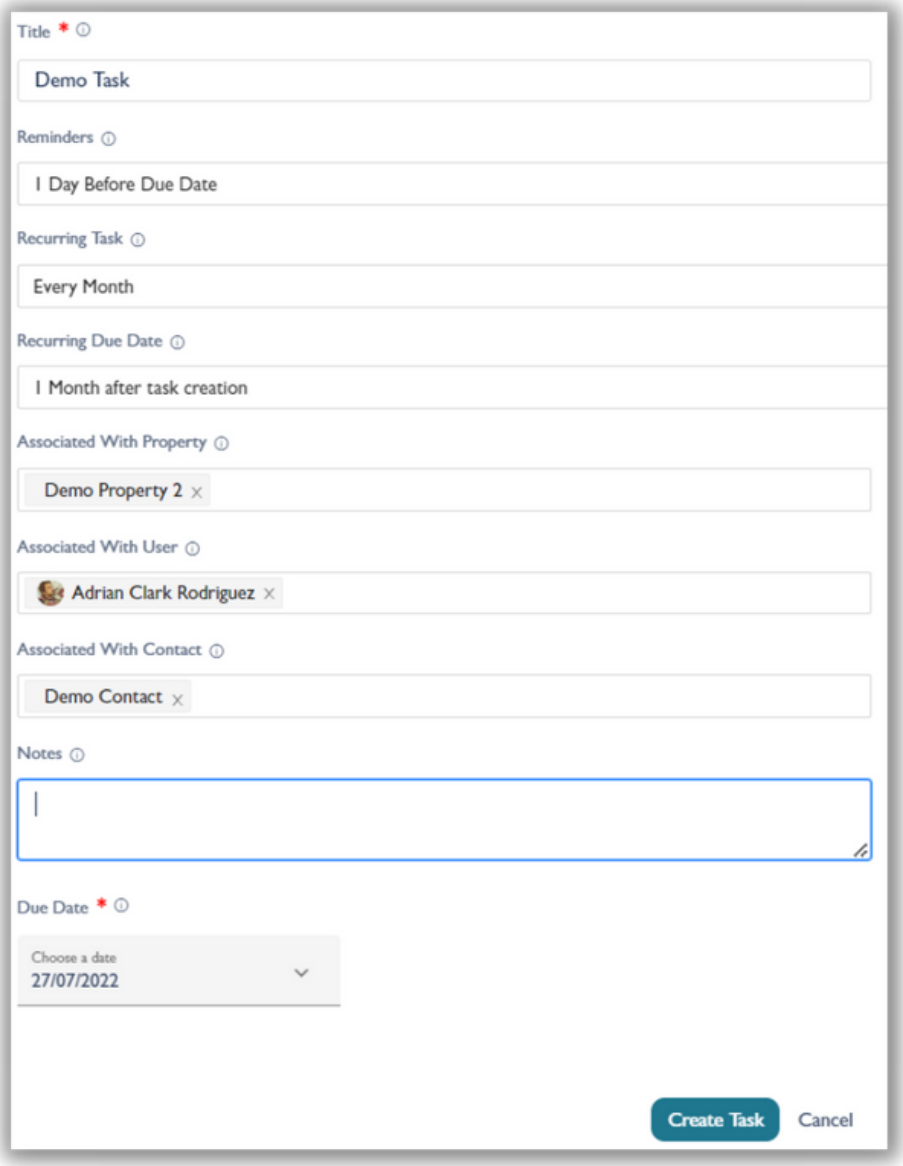
Removes the need to set it again.

Set to receive recurring email reminders

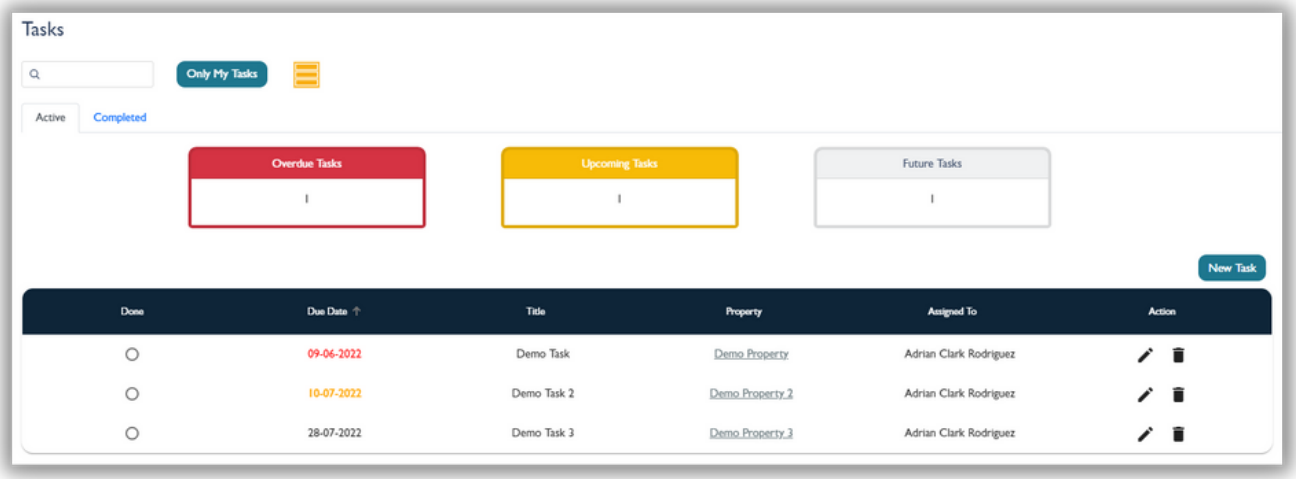
Set so that TASK will show up on the property details.

Account with multiple users can assign the TASK to a person

Set to easily remember your client for this TASK

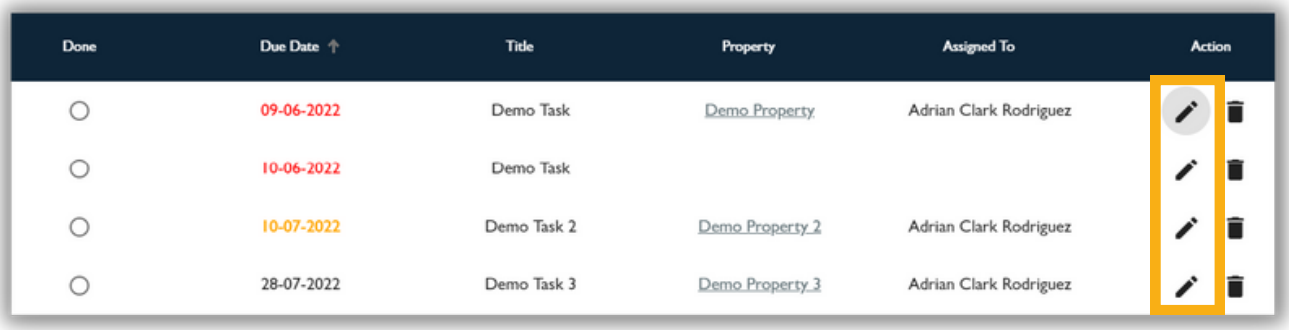


Created TASK will show here in the TASK feature as shown below:



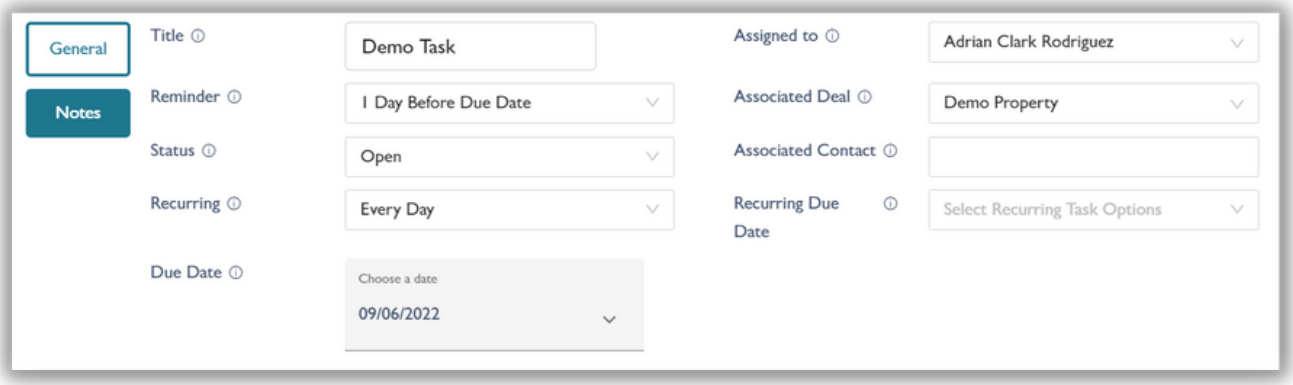
EDIT TASKS

1. Click the Pencil Icon beside the chosen TASKS.

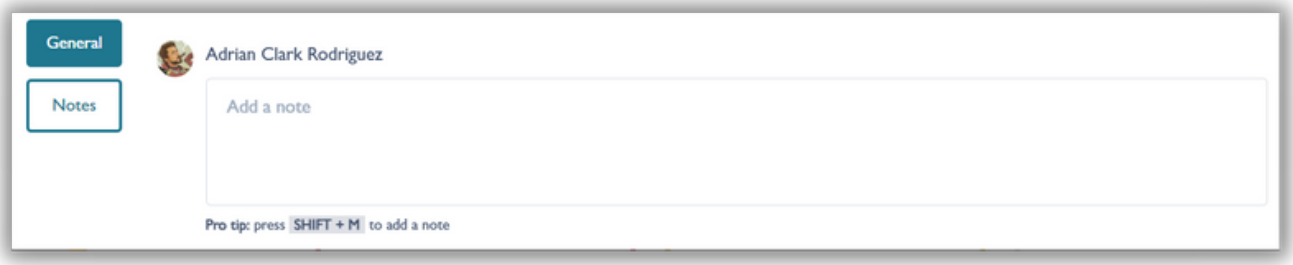


2. Edit any of the Tabs below.

General Tab



Notes Tab

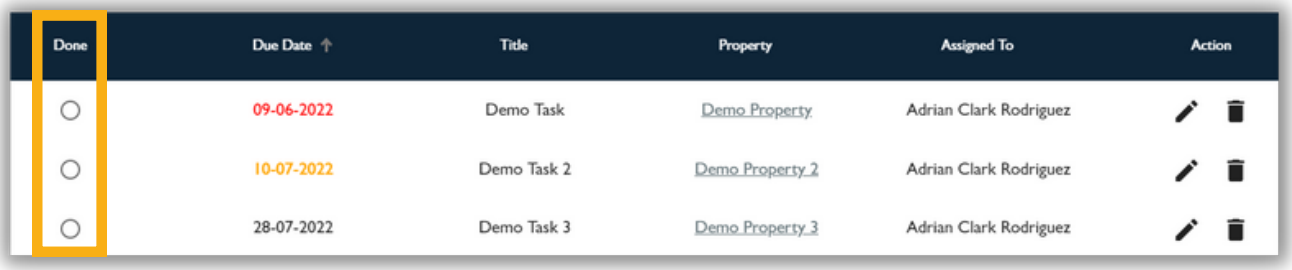


Similar to the other notes, URL added are clickable and would open that link on a new tab.

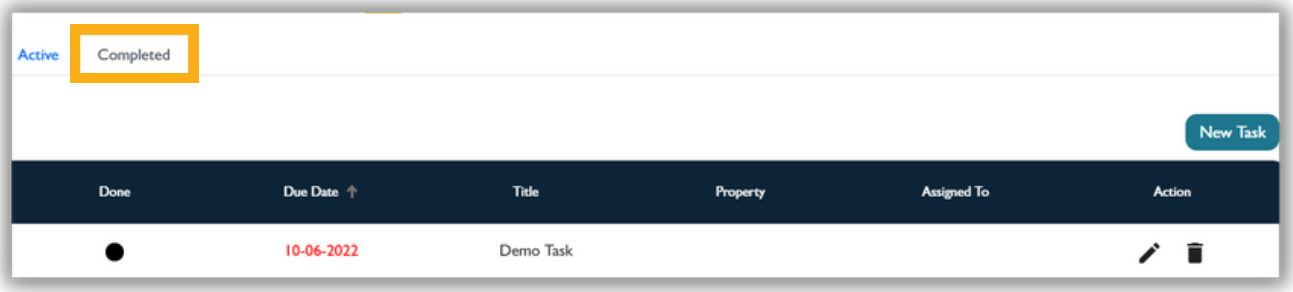
OTHER FEATURES

1. TASKS can be marked as completed and archived.

Similar to PROJECTS, clicking the small circle as shown below will mark the task as COMPLETED and will be archived.

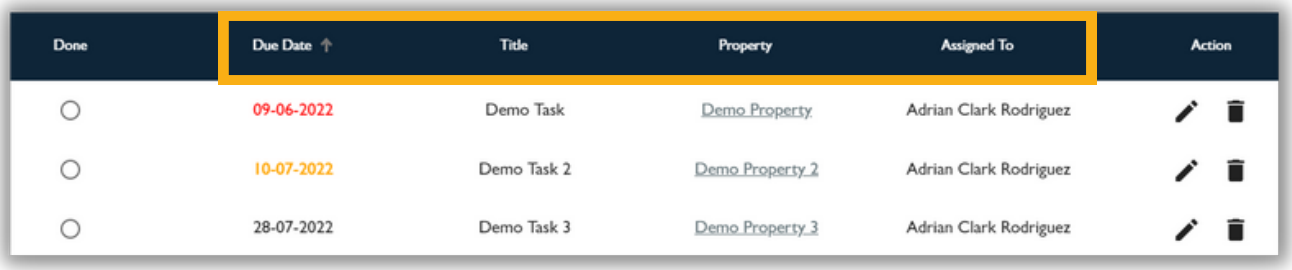


To find the archived tasks, simply go to the COMPLETED Tab.

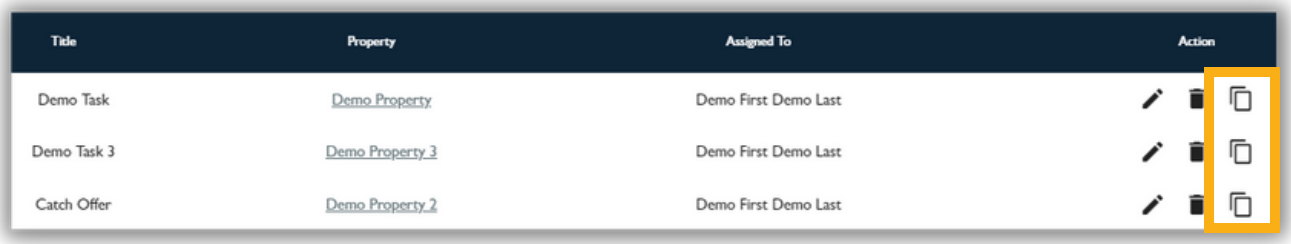


2. Sort TASKS.

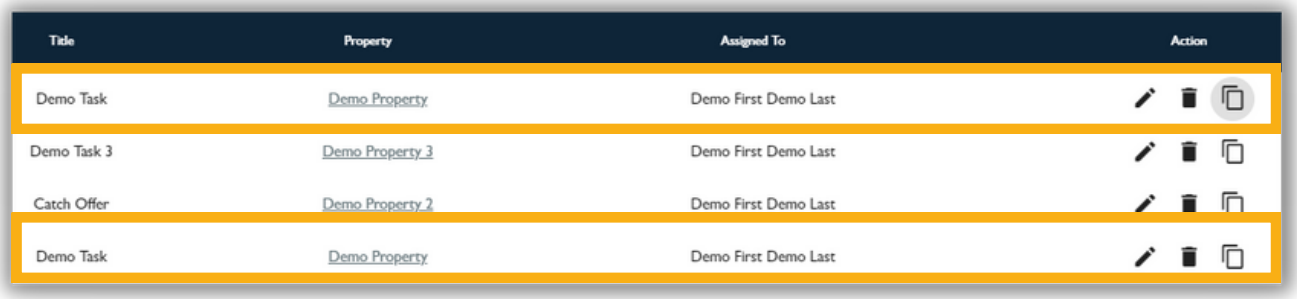
Simply click on the column headers to sort the TASKS from increasing to decreasing and vice versa. Useful for large sets of TASKS.



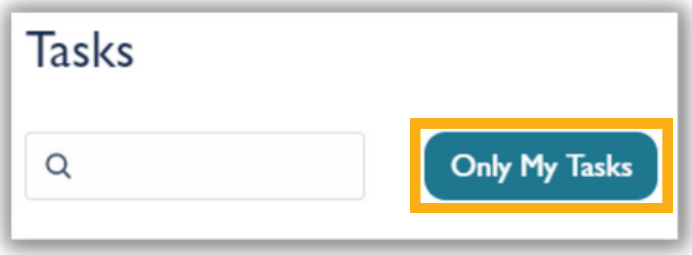
3. Duplicate TASKS.



Feeling lazy? You can duplicate tasks using the Duplicate Icon. Simply click it and confirm the next prompt to duplicate the task. See image below:



4. TASKS search function.



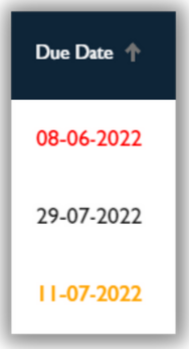
Similar to the Project search function, this search box will only look for TASKS. The "Only My Tasks" button will only look for tasks that were assigned to you via the "Associated with User" detail in the Create Task Form.

5. Status of your TASKS.

Tasks that are past their due date.

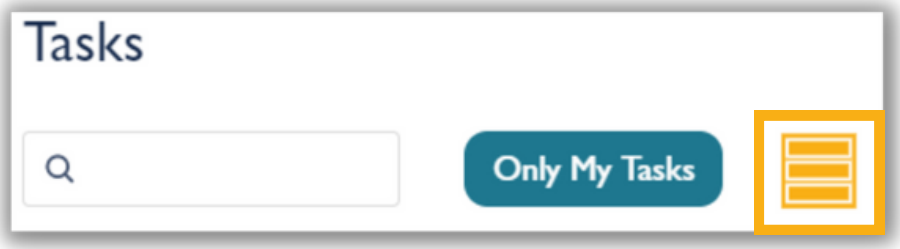
Tasks that are due within 7 days.

Tasks that are not due for the next 7 days.

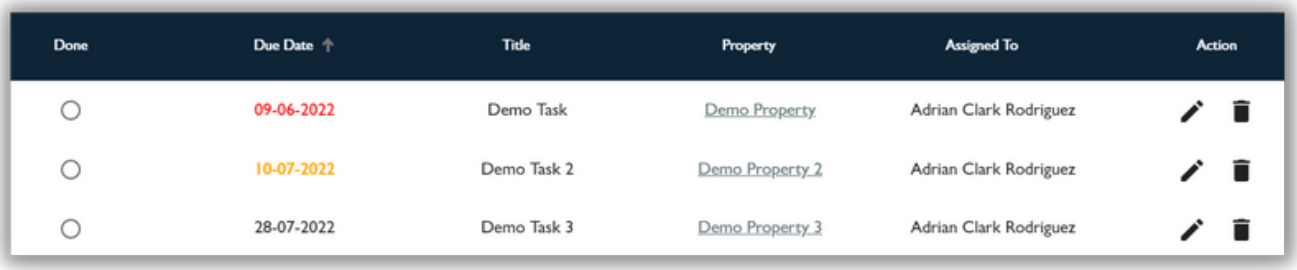


Dates are color coded based on the categories above.

6. KANBAN View and LIST View



LIST View



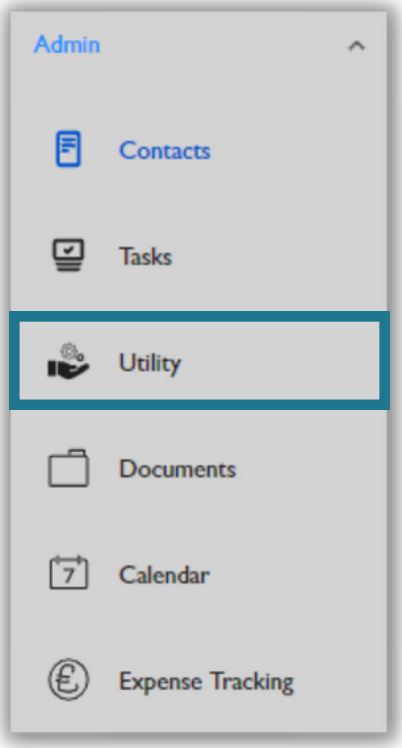
KANBAN View

Similar to your PIPELINE, you can drag and drop TASKS to different stages. Placing the ticket on the "DONE" stage archives them and places them on the COMPLETED tab of the LIST view

UTILITY

Have multiple properties and can't remember which bill is for which? The UTILITY hub was made for this exact problem. Track all your bills using our dedicated UTILITY tracking feature.

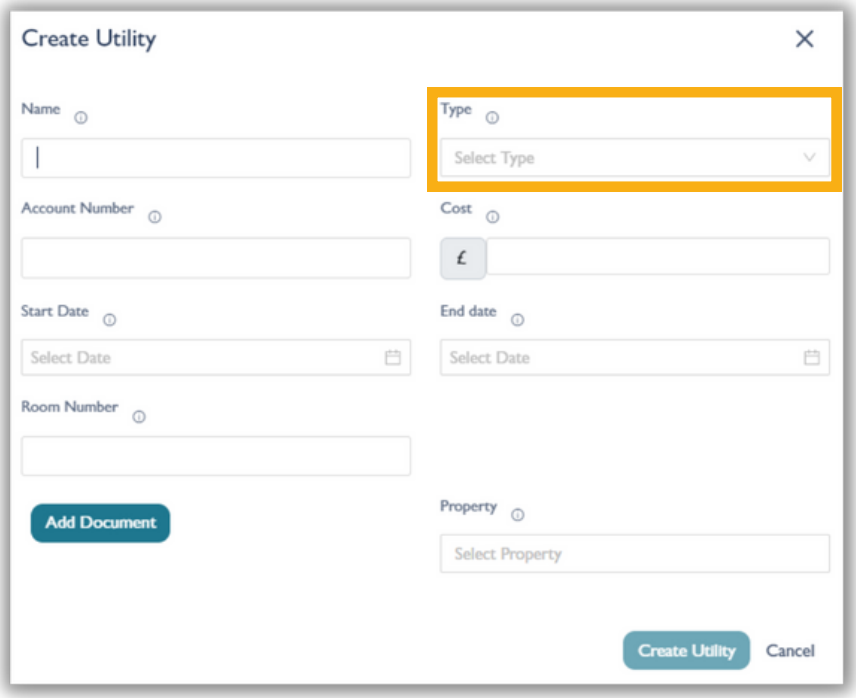
UTILITY can be found on the GRAY SIDEBAR under ADMIN.

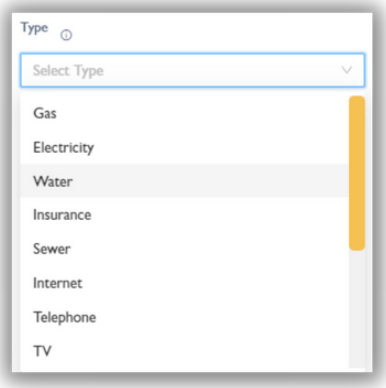


CREATE UTILITY

1. Click the "New Utility" Button.

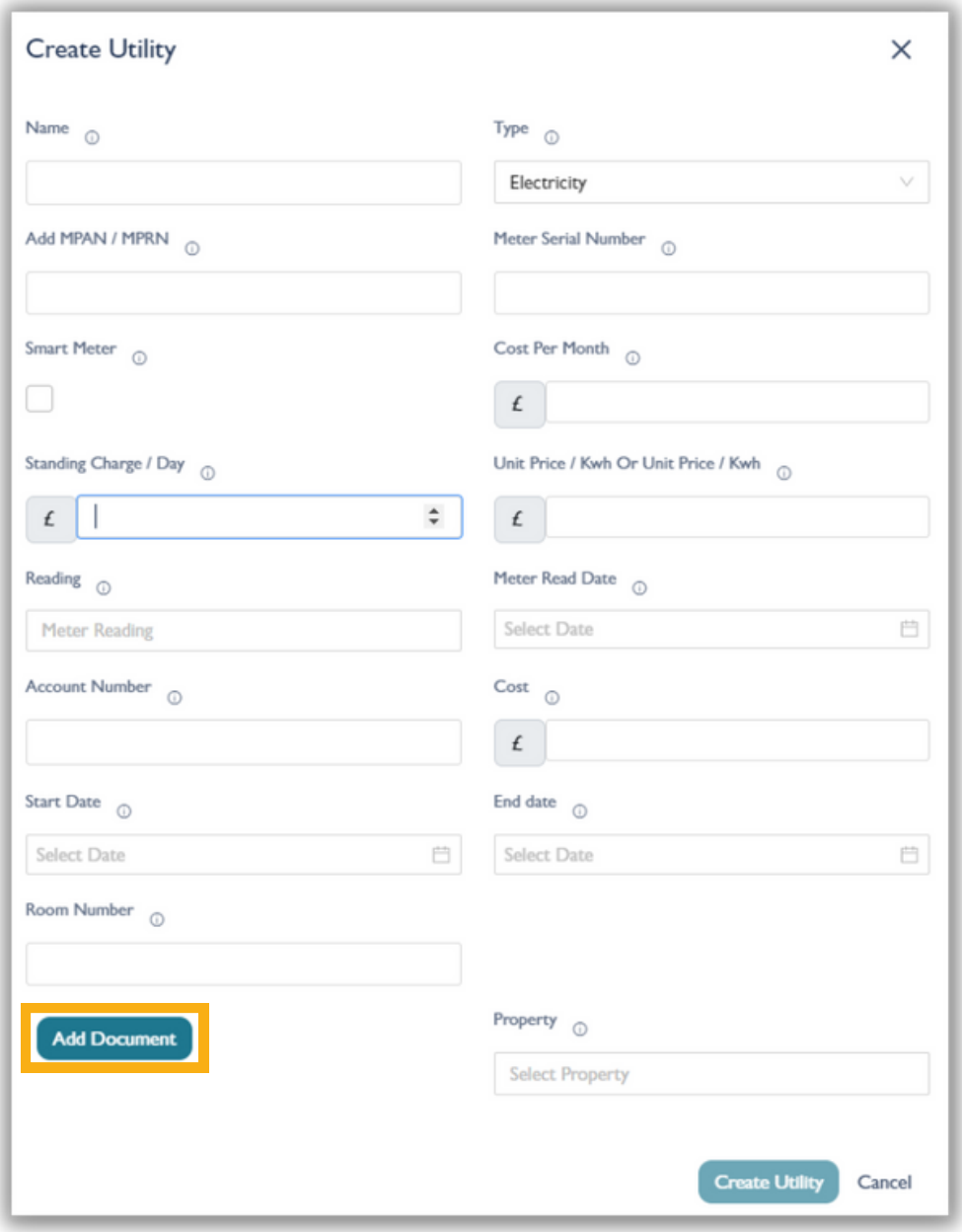
2. Fill in the "Create Utility" Form.





You may select which type of utility you are creating for. Depending on which you choose on the dropdown list, a few optional fields may be added.

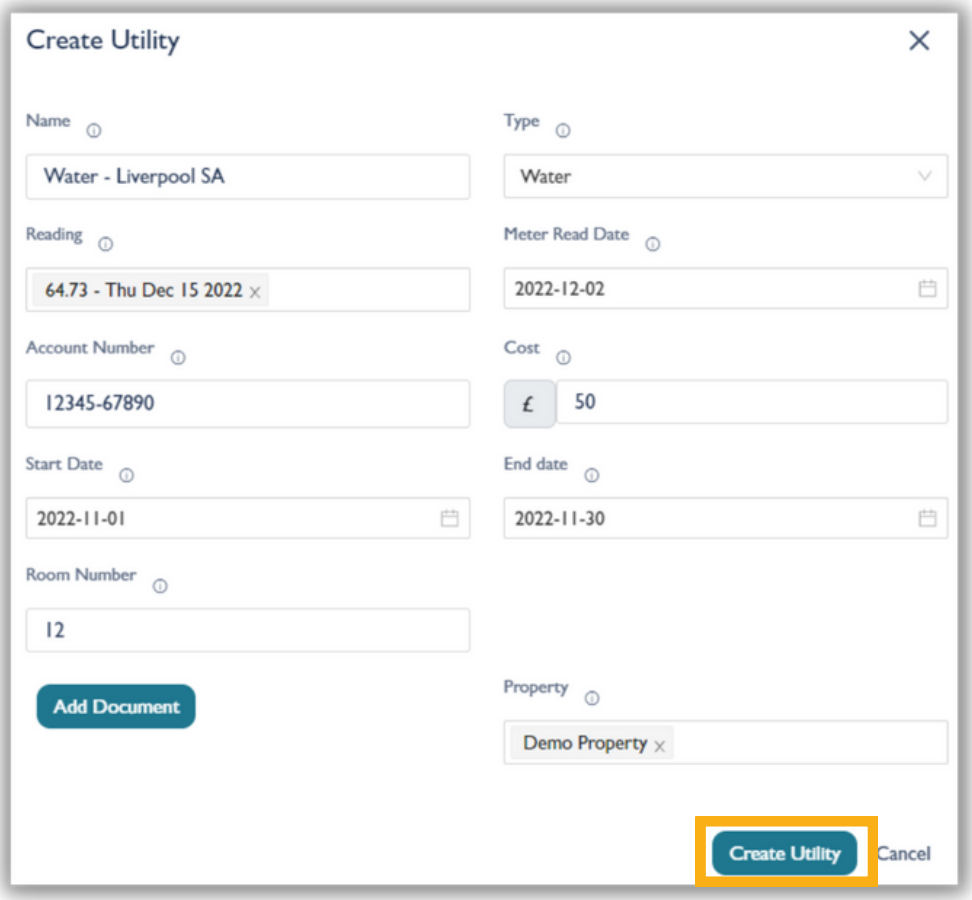
As an example, the image below shows the Create Utility form when Electricity is selected as the type of Utility



You may also attach documents to the Utility Form using the Add Document button. This can be useful especially with the age of paperless bills so that you have all of your records in one place.

Alternatively, you can also take a picture of your paper bills and upload it here so that you no longer need to undergo the hassle of storing bills and remembering where you placed them.

3. Finalize and Create Your Utility.



Once you have filled the form and happy with it, simply click the Create Utility button to save it. Created UTILITY will appear in their corresponding hub as shown below:

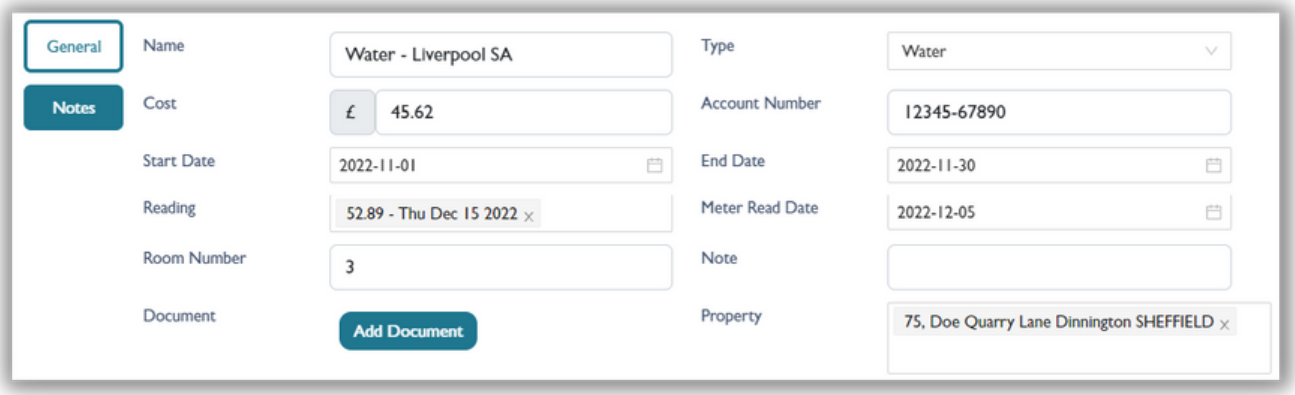
Name	Cost	Start Date	End Date	Account Number	Edit
Water - Liverpool SA	£ 45.62	01-11-2022	30-11-2022	12345-67890	
Internet - Manchester BTL	£ 33	01-11-2022	30-11-2022	1234-5678	
Gas - Stockport SA	£ 50	01-11-2022	30-11-2022	12345-67890	

EDIT UTILITY

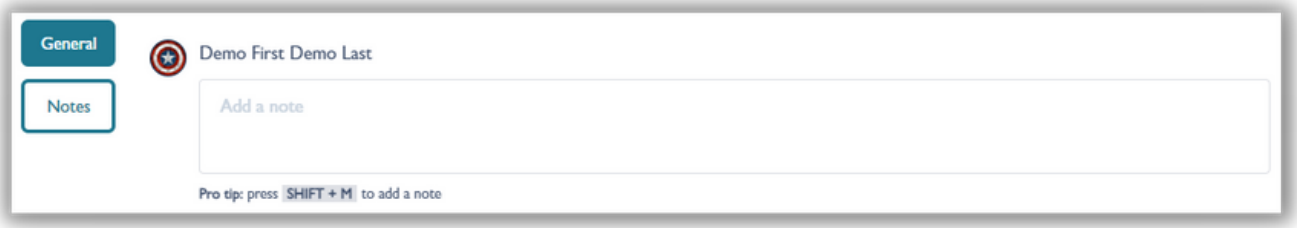
1. Click the Pencil Icon beside the chosen UTILITY.

2. Edit any of the Tabs below.

General Tab



Notes Tab



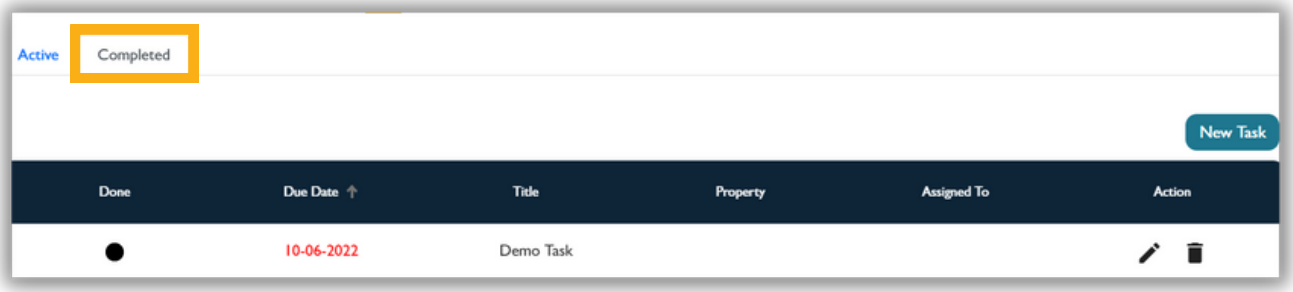
Similar to the other notes, URL added are clickable and would open that link on a new tab.

OTHER FEATURES

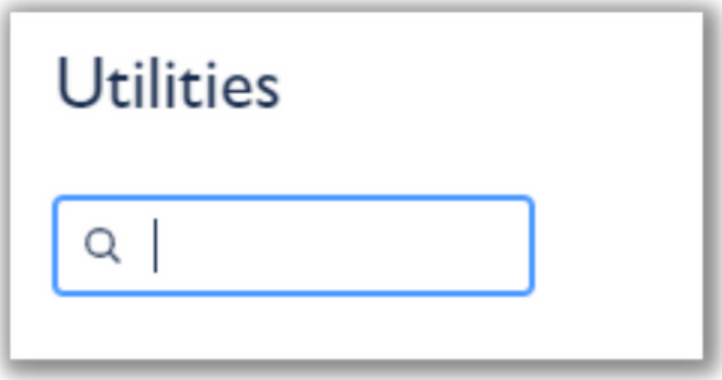
1. Sort UTILITIES.

Simply click on the column headers to sort your UTILITIES from increasing to decreasing and vice versa. Useful for large sets of UTILITIES.

To find the archived tasks, simply go to the COMPLETED Tab.

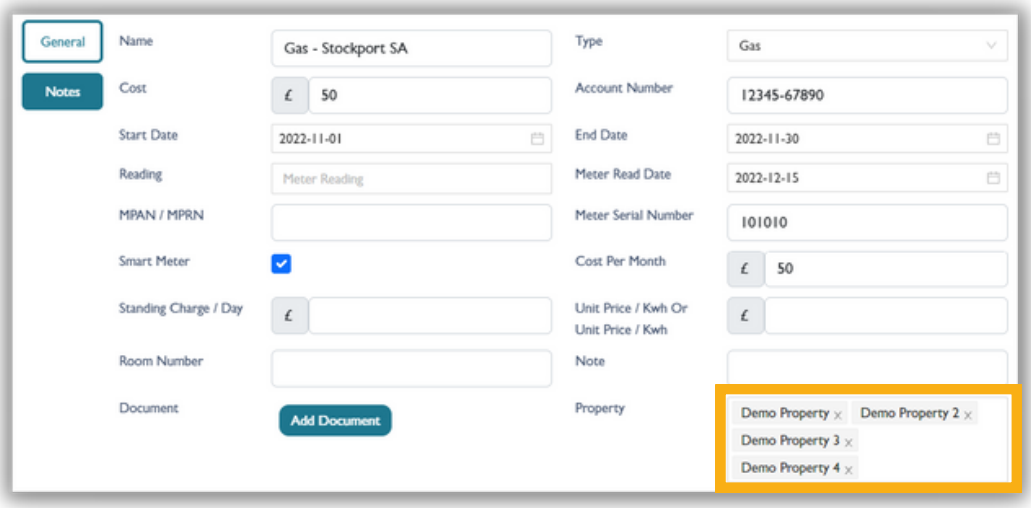


2. UTILITY search function.



Similar to the TASKS search function, this search box will only look for UTILITIES.

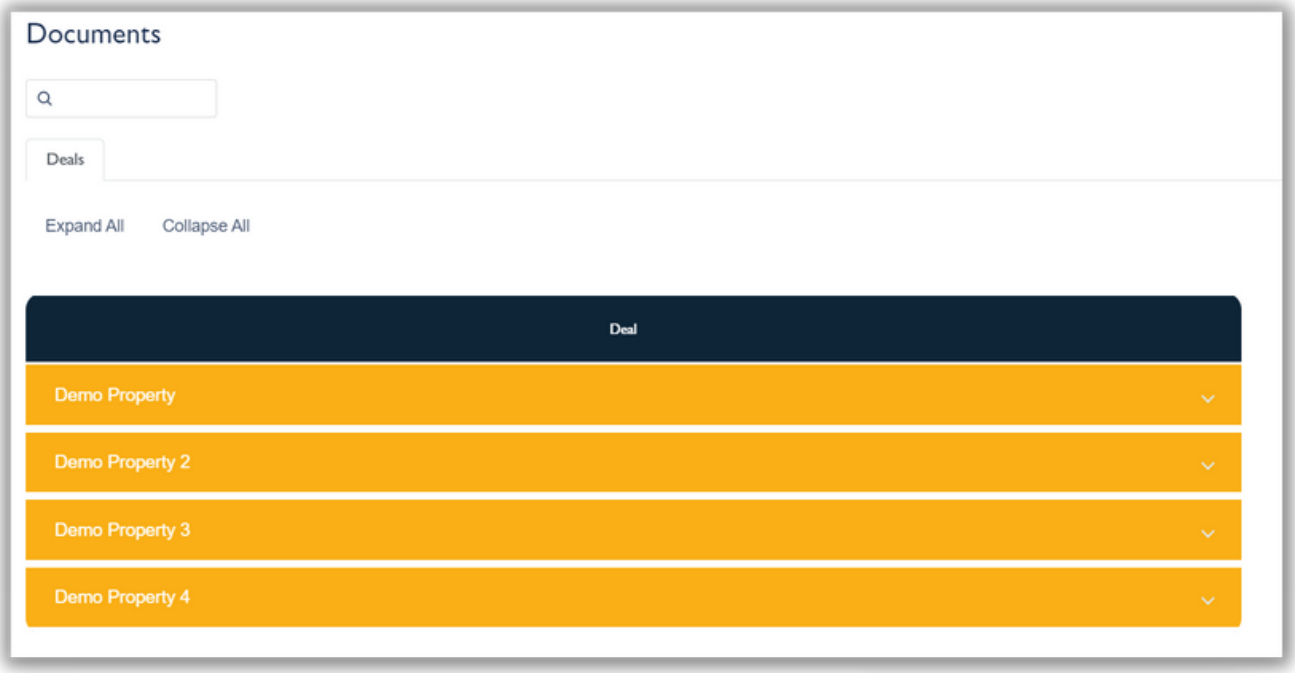
3. Assign UTILITIES to multiple properties.



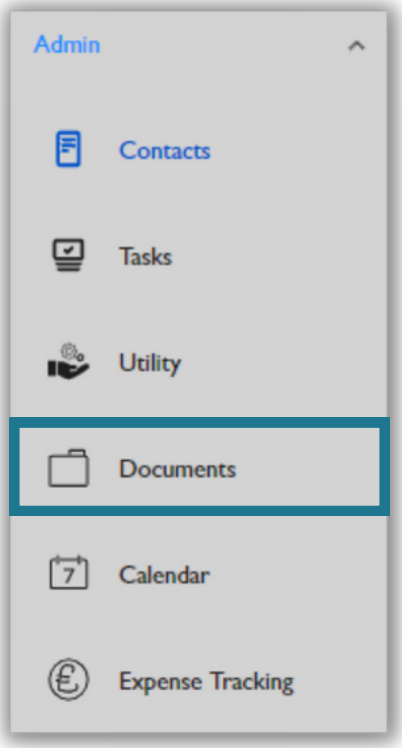
You can assign UTILITIES to multiple properties. Useful if you want to group all your electricity expenses together. Such as if you own multiple flats in the same building so that they are easier to track.

DOCUMENTS

Scrambling around to find that one document mixed with all the other papers, bills, and receipts from other properties? We've been there. With the DOCUMENTS feature, you can assign a document to a Property so that you will never lose it again.

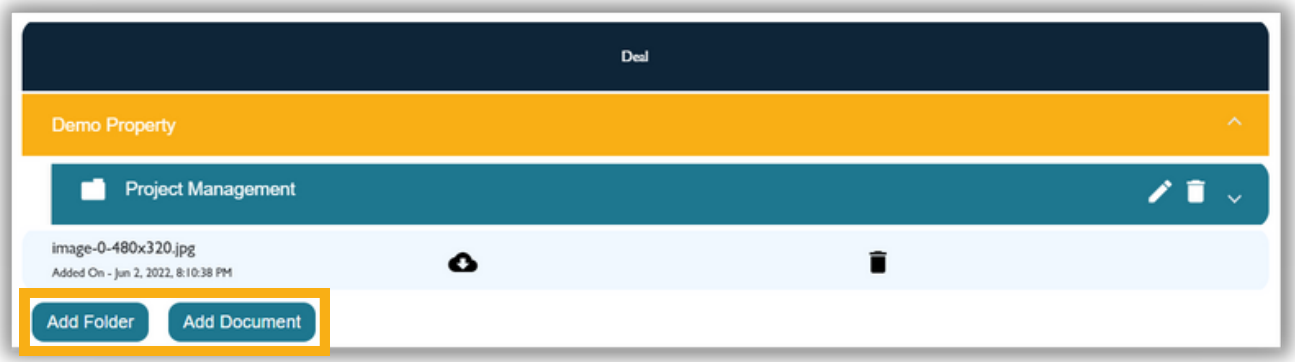


DOCUMENTS can be found on the GRAY SIDEBAR under ADMIN.

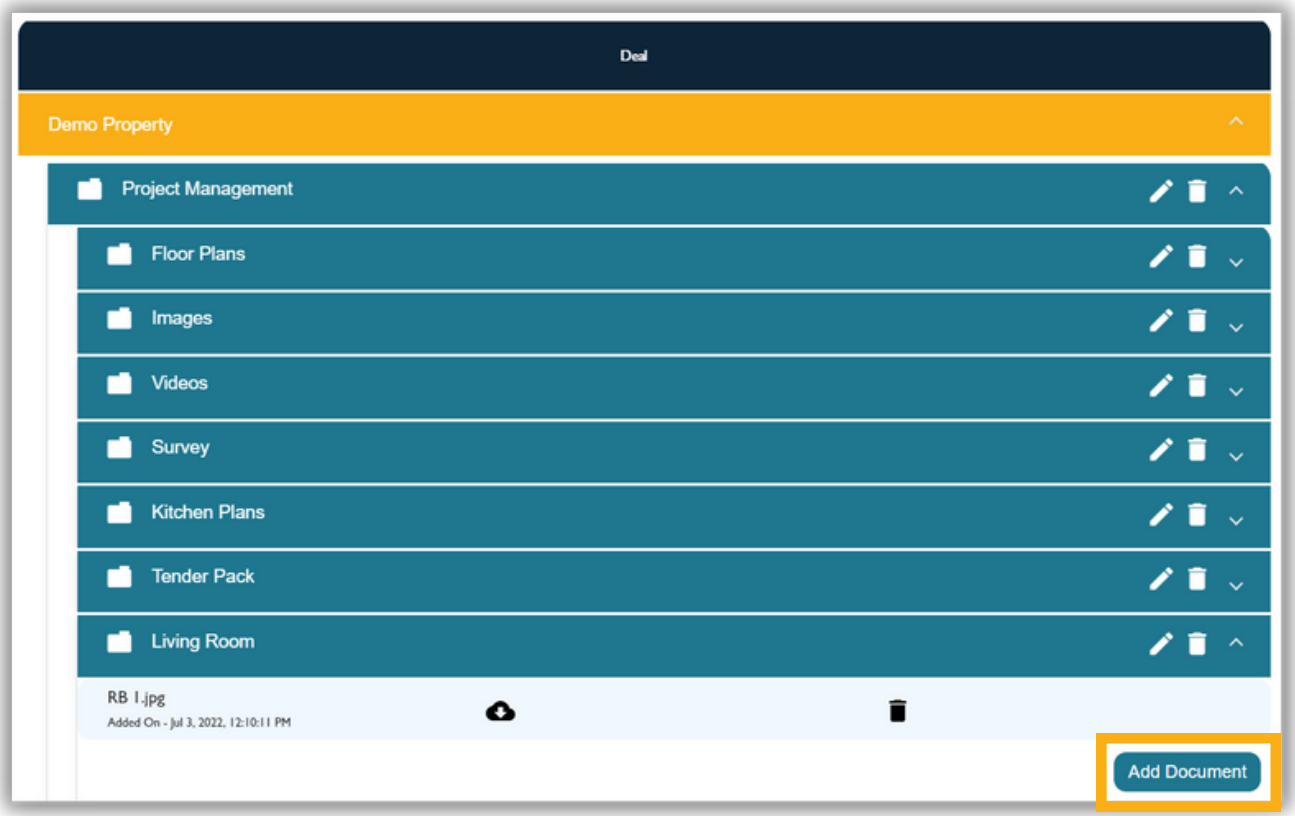


UPLOAD DOCUMENTS

1. Click the property that you wish to upload a document to.



Folders are automatically created for every single property that you create. You can create your own custom folder for that property using the "Add Folder" button. Within any of the folders, you can upload any documents you like using the "Add Document" button.



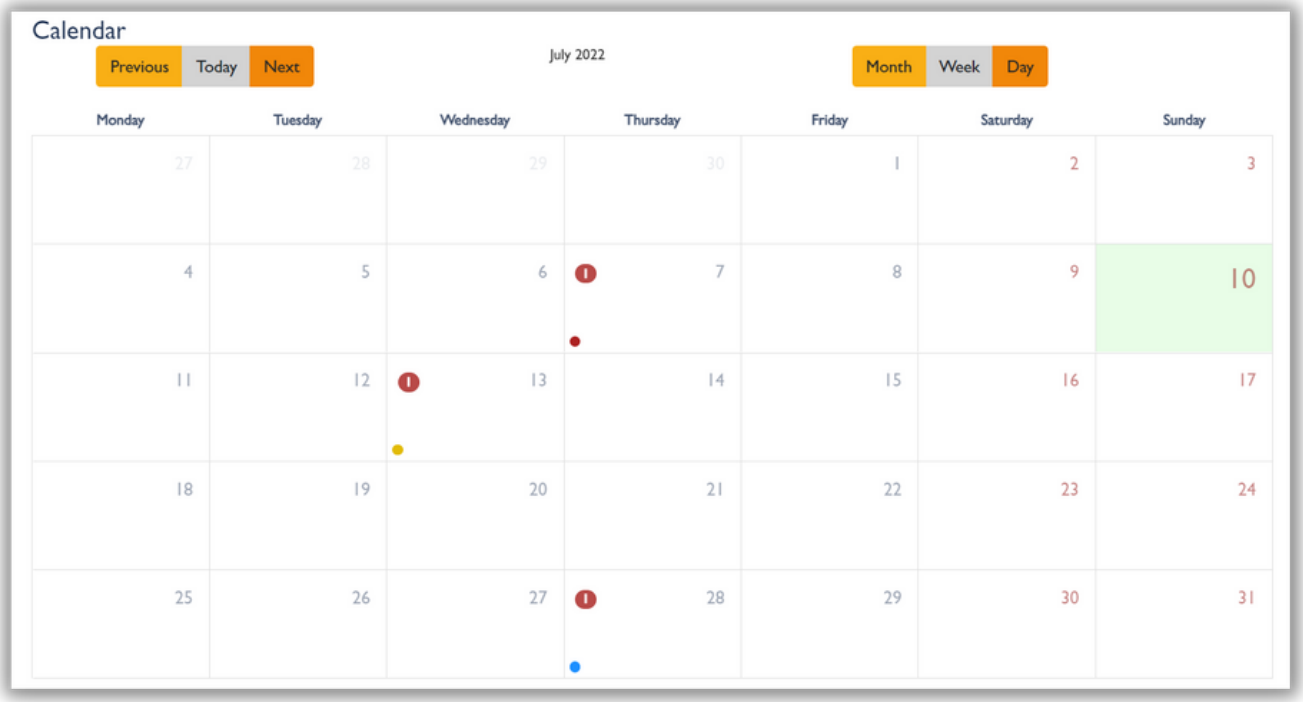
2. Uploaded files may be downloaded when needed.

Download File

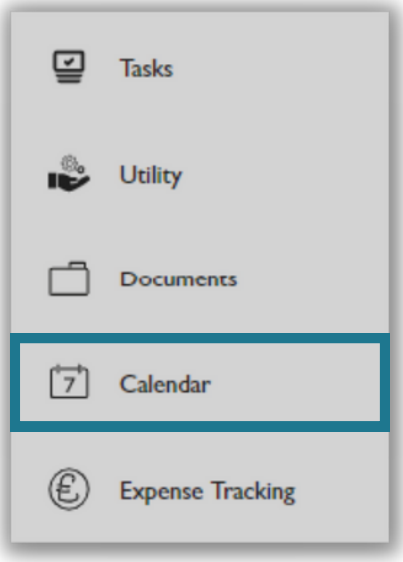
Click the Cloud Icon to download your uploaded files. With this, you can rest assured that any of your uploaded files can be accessed almost everywhere and anytime as long as you have internet access. You also won't be needing any third party app either as it is already a feature of Property Store.

CALENDAR

The CALENDAR has simple and very easy to use functionality. It follows a simple color scheme so that you can recognize and prioritize scheduled activities that are in need of attention. With this tool, it will make it easier for you to plan your day, week, or month.

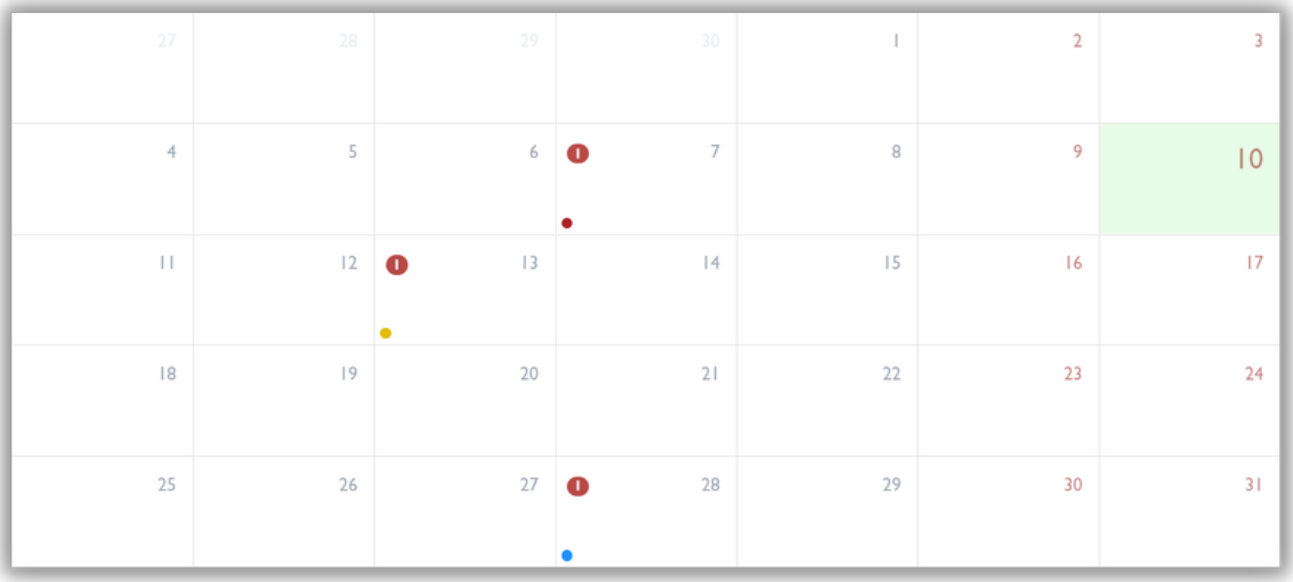


CALENDAR can be found on the GRAY SIDEBAR under ADMIN.



CALENDAR FUNCTIONS

1. Created TASKS will show up on the CALENDAR.



These tasks will show up as dots. Color of the these dots are similar to the color scheme for the TASK and MAINTENANCE as shown:

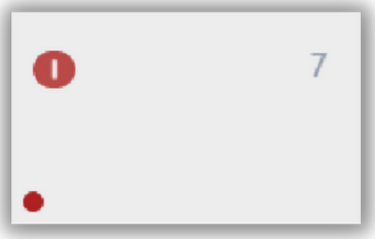
Tasks that are past their due date.

Tasks that are due within 7 days.

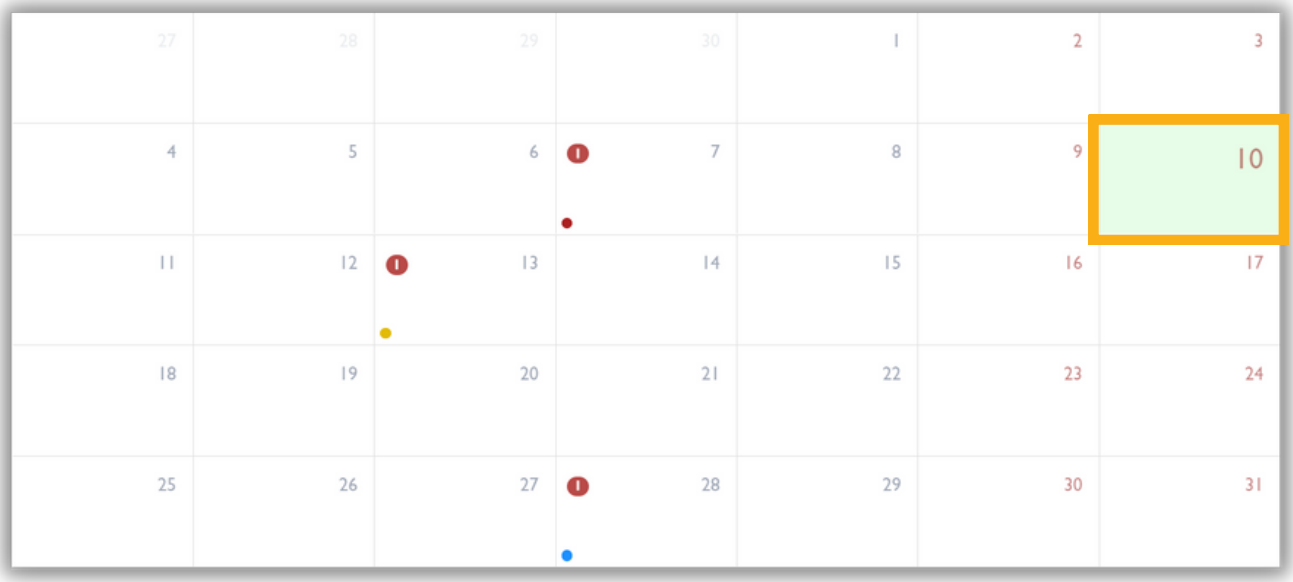
Tasks that are not due for the next 7 days.

RED dots are TASK past their due date.
YELLOW dots are task that are due in 7 days.
BLUE dots are TASK that are not due for the next 7 days.

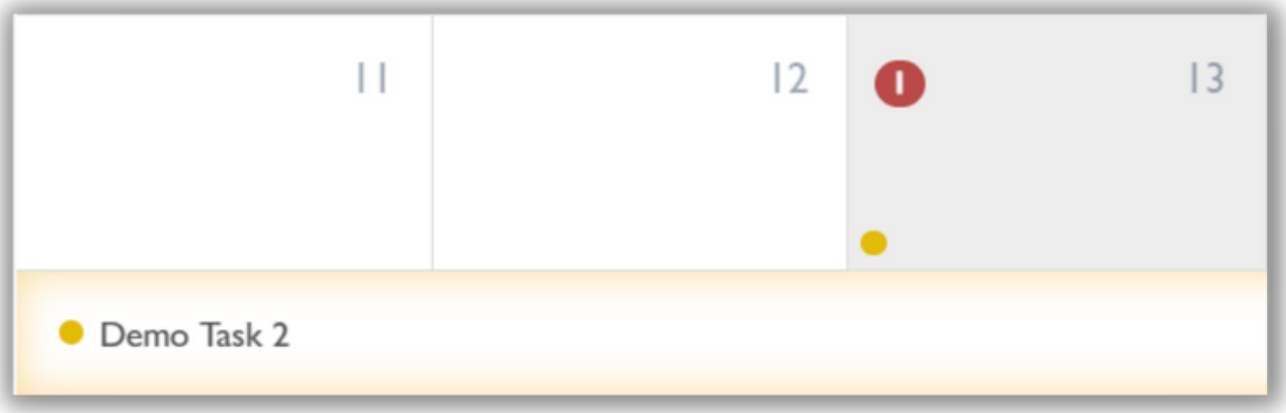
2. Number indicates the sum of TASK due that day.



3. The current date is highlighted in green.

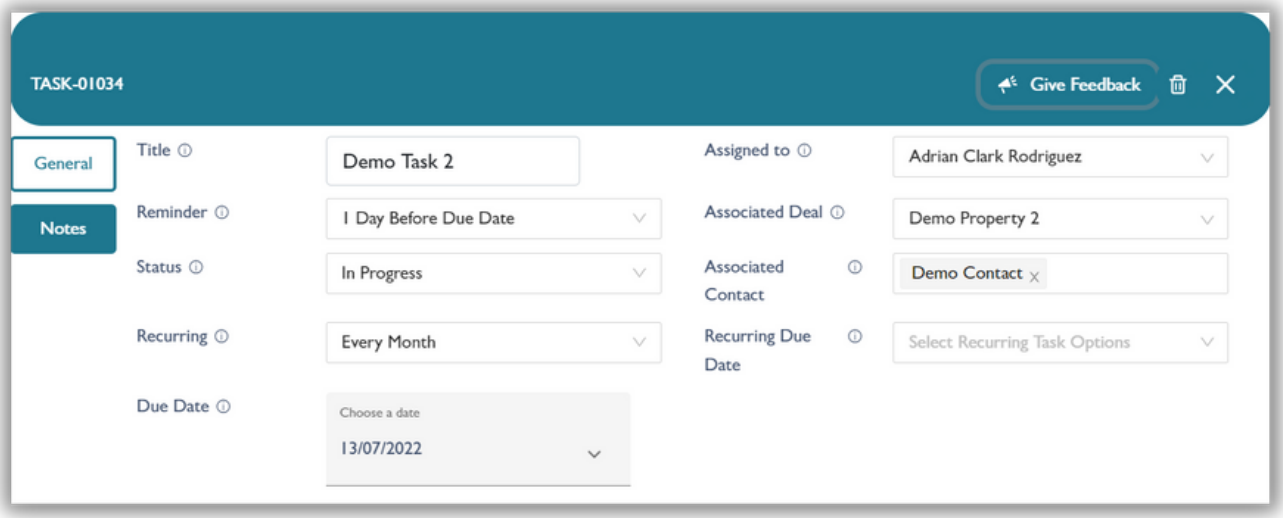


4. Clicking on a date with a dot shows the TASK.



5. Click on the name of the TASK to see the details.

Upon clicking, the image below showing the details of the task will pop up on your screen.

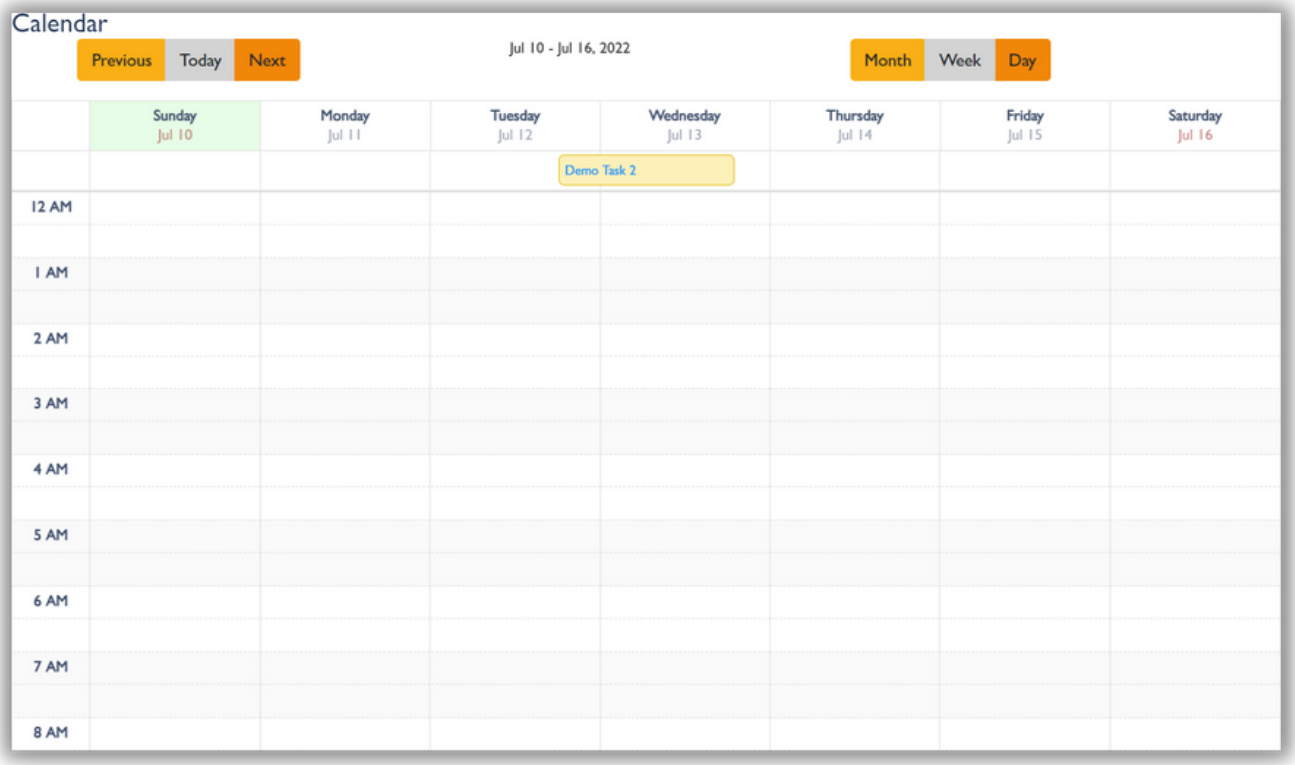


From here, you can edit the Task as shown in the TASK Section of this manual.

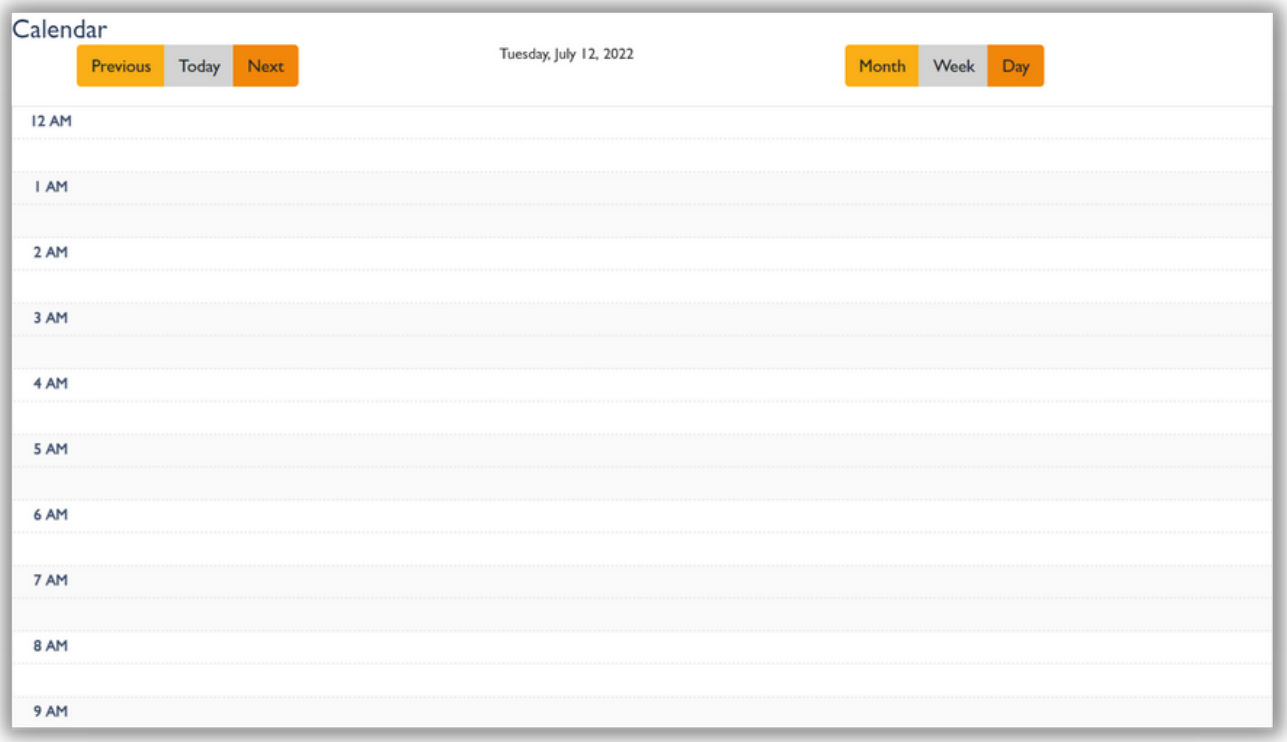
CALENDAR VIEWS

1. Calendar can also be viewed by week or by day.

WEEK View

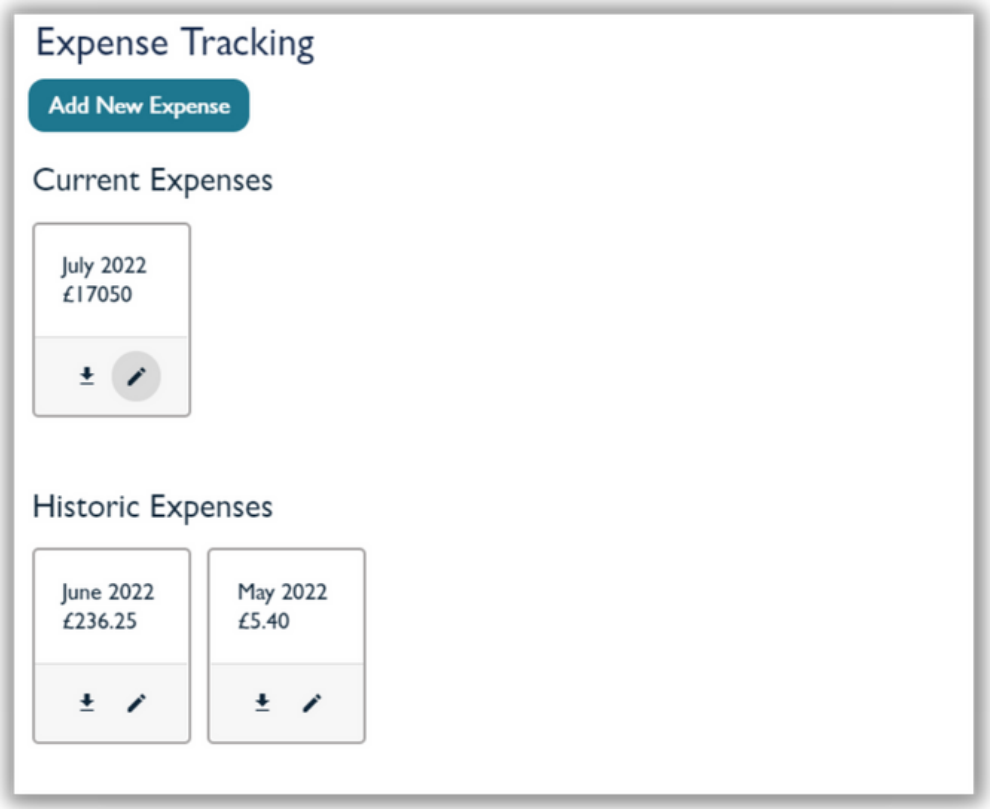


DAY View

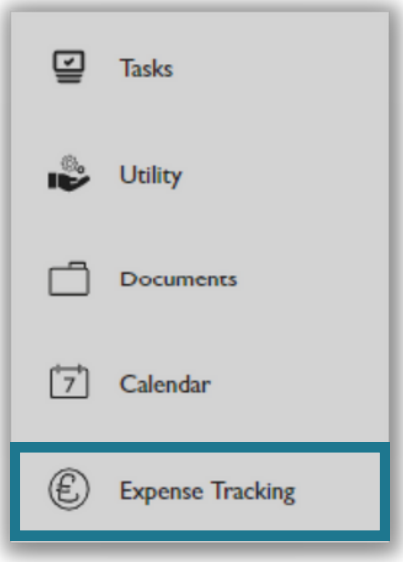


EXPENSE TRACKING

It is easy to lose track of your expenses especially for small ones incurred on different days. As such, the Expense Tracking tool was created to make it easier for you to track all the expenses of your business.



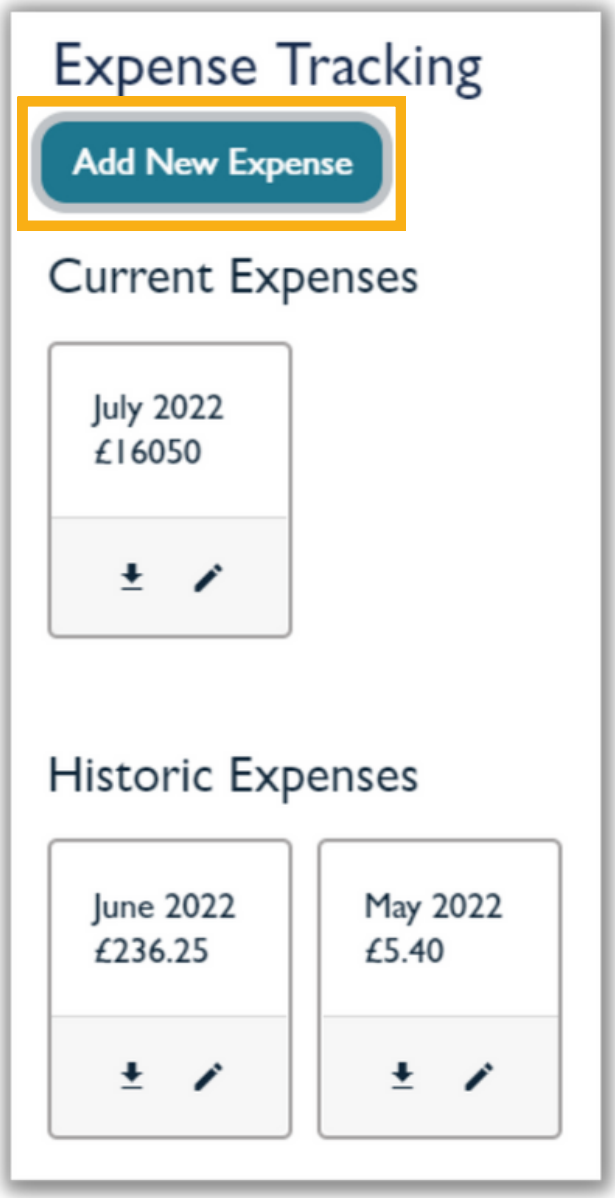
EXPENSE TRACKING can be found on the GRAY SIDEBAR under ADMIN.



USING TRACKER

1. Click the "Add New Expense" Button.

The Create Expense Form will pop up as upon clicking which is shown on Step 2.



A new Expense Template will be created every month and the previous month will be moved to Historic Expenses.

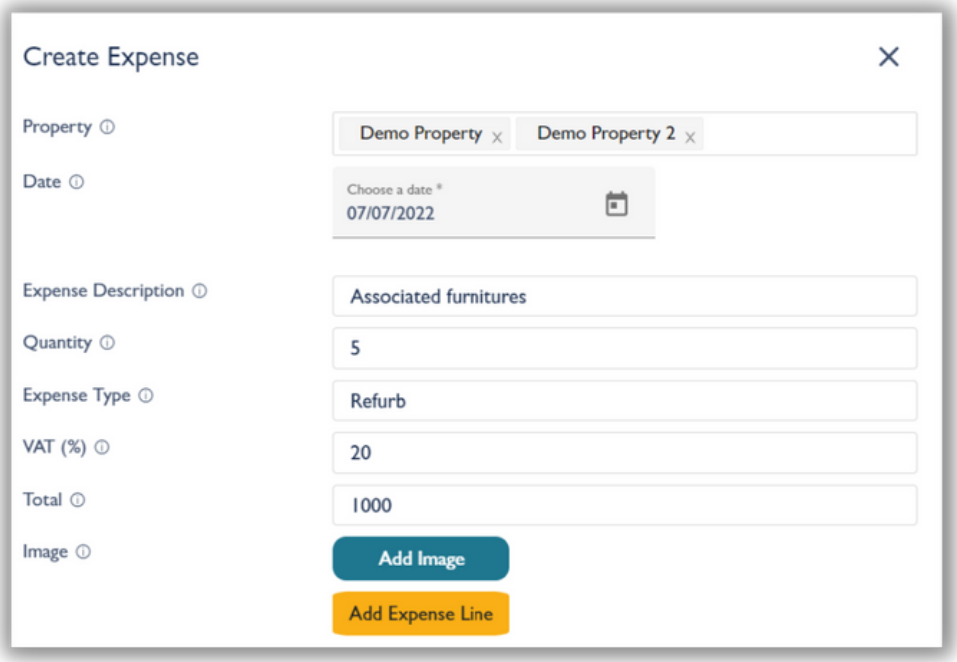
Click the Pencil icon to remove or add expenses to that month. This is also where you can review your expenses.

Total expenditure is shown below the month.

Click the Download icon to download your expenses into a pre-formatted spreadsheet and all the images you have uploaded here.

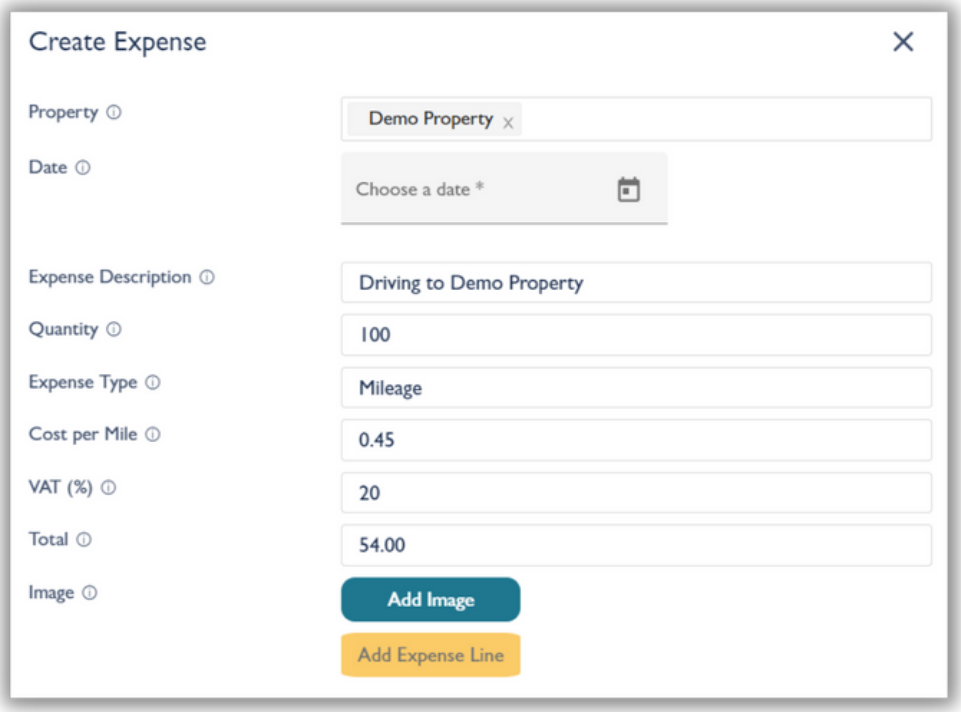
2. Fill in the CREATE EXPENSE form.

Associate expense to any property for tracking.



Click the "Add Image" button to upload any picture.

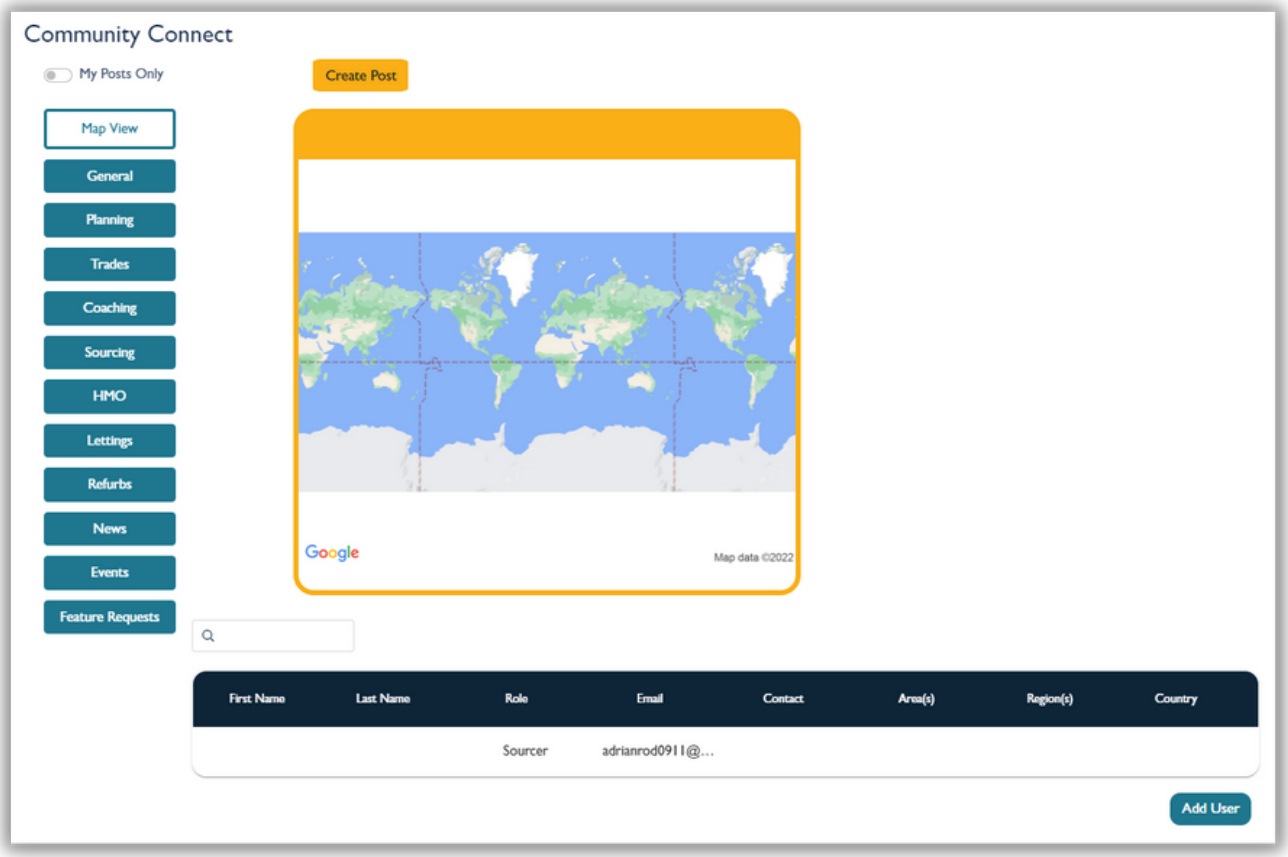
If "Mileage" is chosen, "Cost per Mile" will pop up along with your default value in Pipeline Admin.



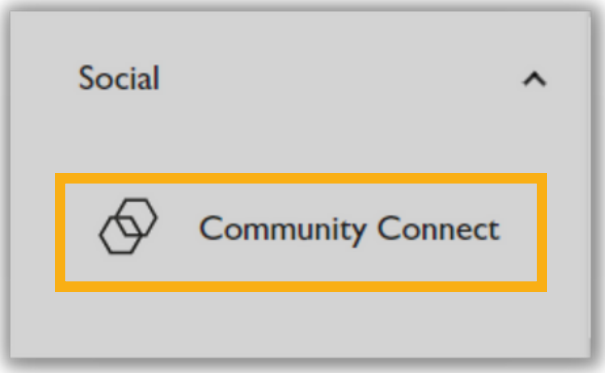
Click the "Add Expense Line" button once you're done with the details to save and include the Expense.

COMMUNITY CONNECT

COMMUNITY CONNECT is the social part of Property Store. It is so that users can interact, share ideas, exchange information, and network. Sharing your details to other users is entirely optional but you may miss out on some opportunities.



COMMUNITY CONNECT can be found on the GRAY SIDEBAR under SOCIAL.



SOCIAL FEATURES

1. Map View of Property Store Users

The Map will show the Property Store users that shared their information and location.

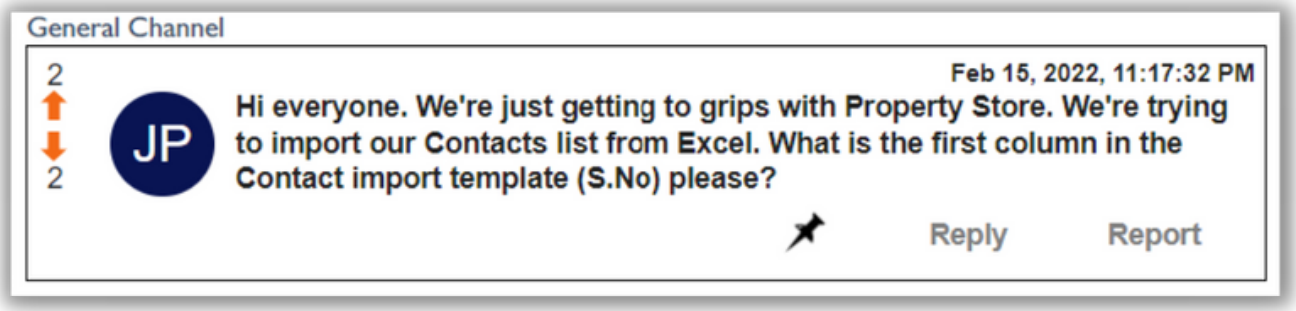
The table below is an example of what you may be able to see in Property Store once everyone share their information to the community. With this, you may connect to other Property Store users. The search function will allow you to filter roles and regions to help you find the people near you.

First Name	Last Name	Role	Email	Contact	Area(s)	Region(s)	Country
Pamela		Sourcer	test@gmail.com	7878777448	Birmingham	East Midlands	UK
Terry		Landlord	test@gmail.com	7878777448	Westhill	Scotland	UK
Daniel		Investor	test@gmail.com	7878777448	Burton	North East	UK
Peter		Sourcer	test@gmail.com	7725215068	Leeds	East Midlands	UK
Jake		Coach	jake@badgerandnash.com	7878777448	Blackpool,Preston,Newcastle	North West	UK
Doug		Agent	test@gmail.com	7878777448	Birmingham	East Midlands	UK
Jane		Investor	test@gmail.com	7878777448	Alcester	East Midlands	UK
Nicola		Landlord	test@gmail.com	7878777448	Glastonbury	South West	UK
Chris		Willing to View	test@gmail.com	7878777448	Manchester	West Midlands	UK
Jon		Sourcer	test@gmail.com	7878777448	Nottingham	North East	UK

You may edit your details and modify your visibility to the community via the Pipeline Admin.

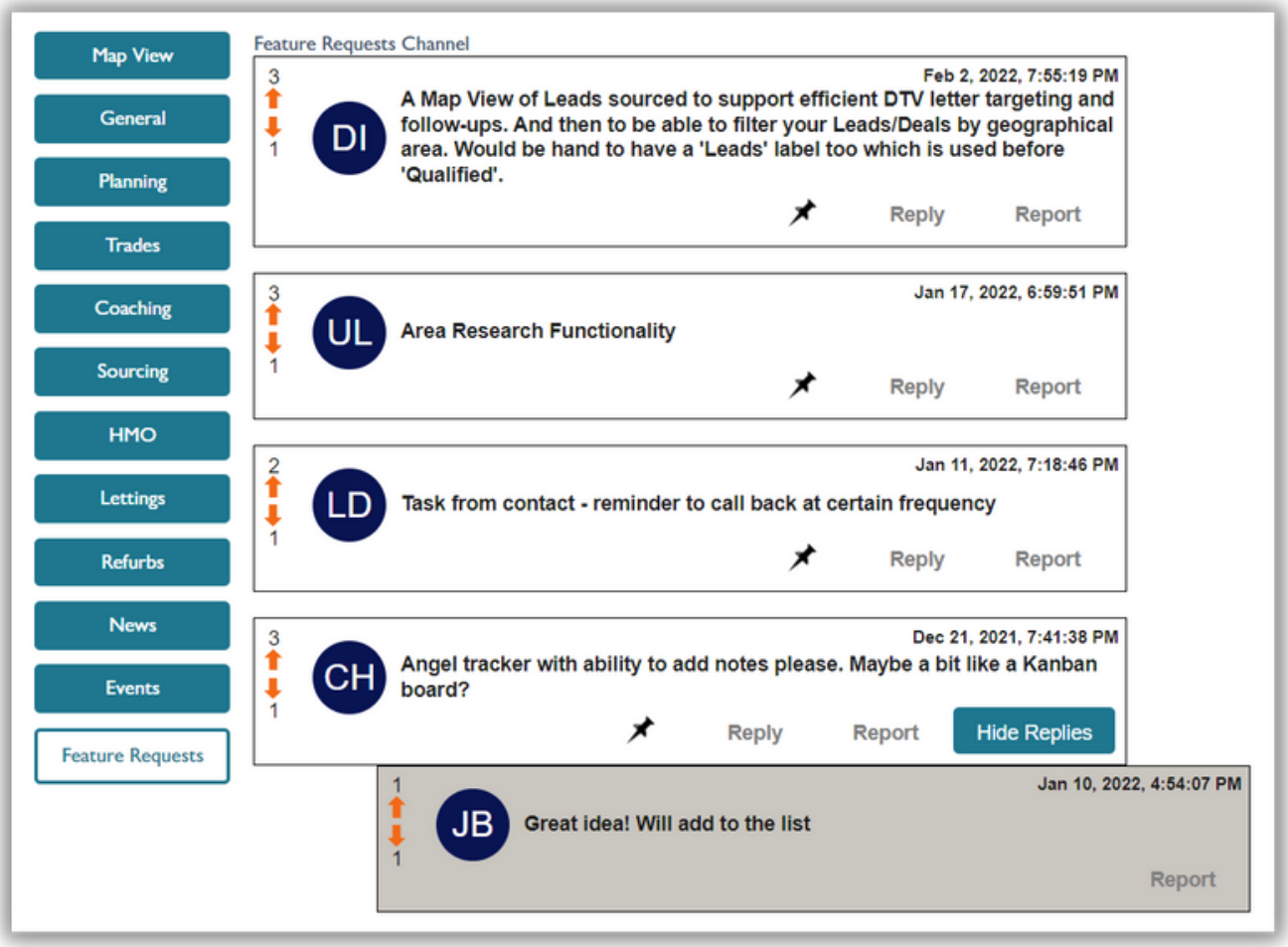
2. Community Channels.

The buttons "General", "Planning", up to "Feature Requests" are channels for specific topics to make it easier to look into. The image above shows the discussions on the "General" channel.



You may upvote or downvote the community posts. You may reply to these posts. If a post is inappropriate, you may report it so we may review it and take it down if needed. If you really like a post, you may use the Pin Icon similar to social media platforms.

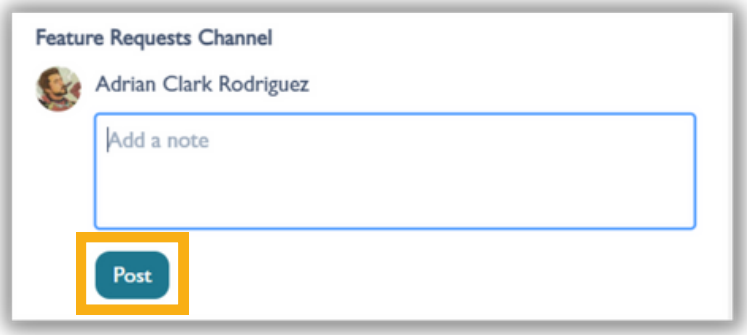
3. Community Channels - Feature Requests.



Got a great idea for a feature that you want to see? Simply post on the "Feature Request" and we will look into it. New features are added based on the upvotes it receives so it is recommended to check this channel occasionally and upvote suggested features that you like.

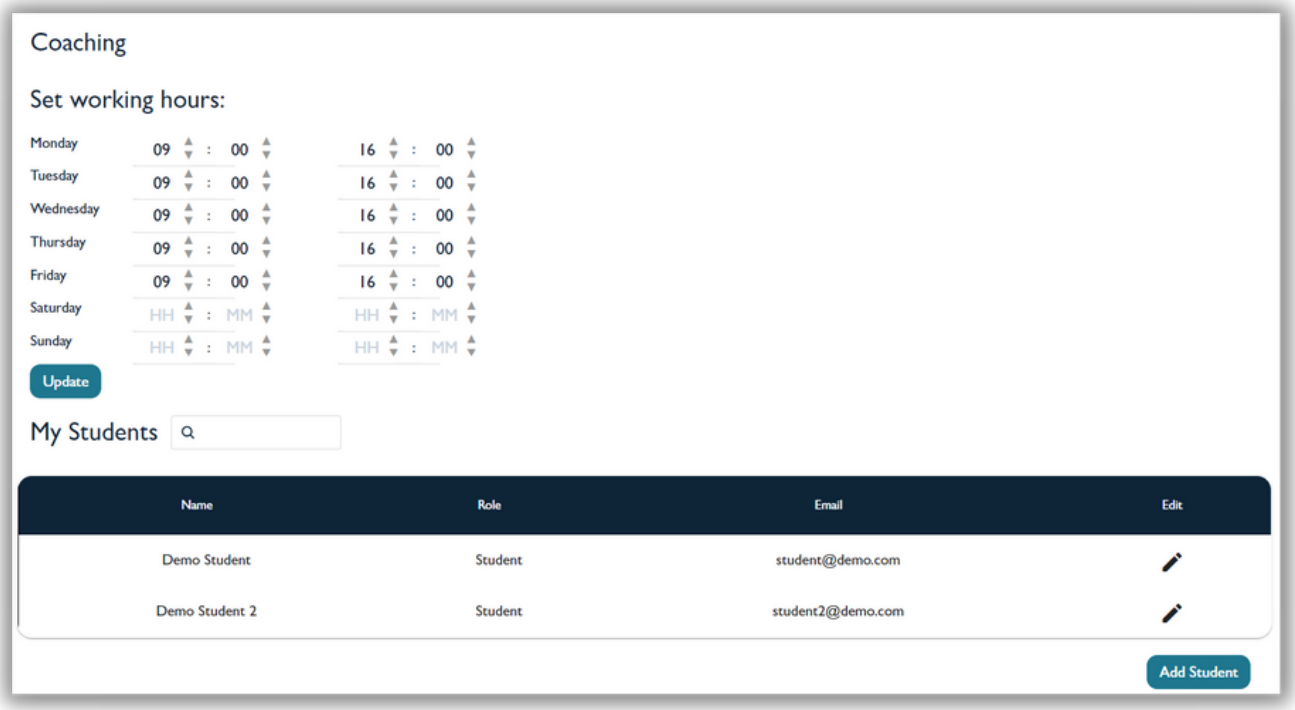
4. How to create your own post.

First, choose the channel that you want to post to and then click the "Create Post" Button. Type in what you have in your mind and click the "Post" button

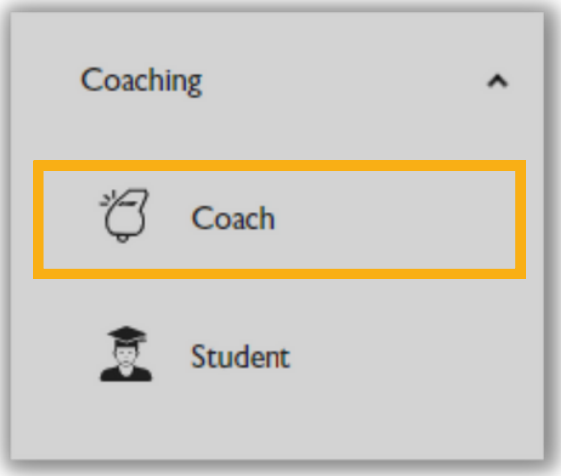


COACH

The COACH Module is a special feature in Property Store only available to those that are subscribed to our GOLD Package. This can be used to monitor or track your training sessions with your students and you can assign task to them. In addition, you can exchange notes and messages easily with your students.

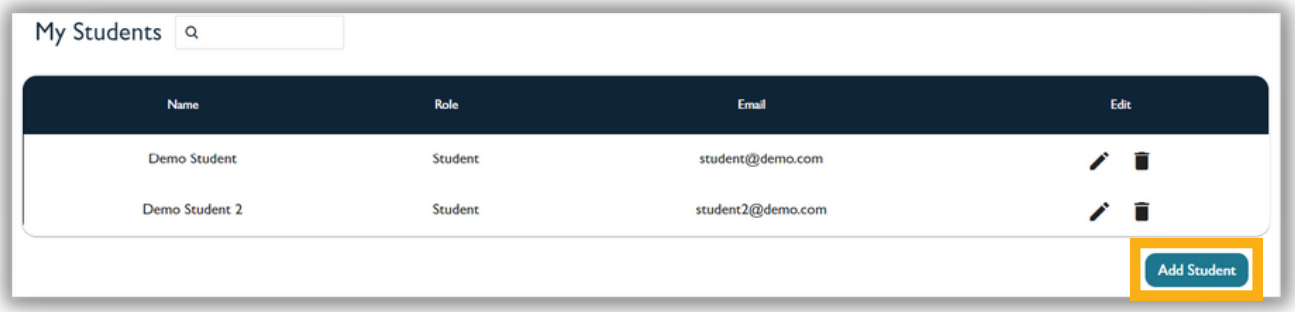


COACH feature can be found on the GRAY SIDEBAR under COACHING.



ADD STUDENTS

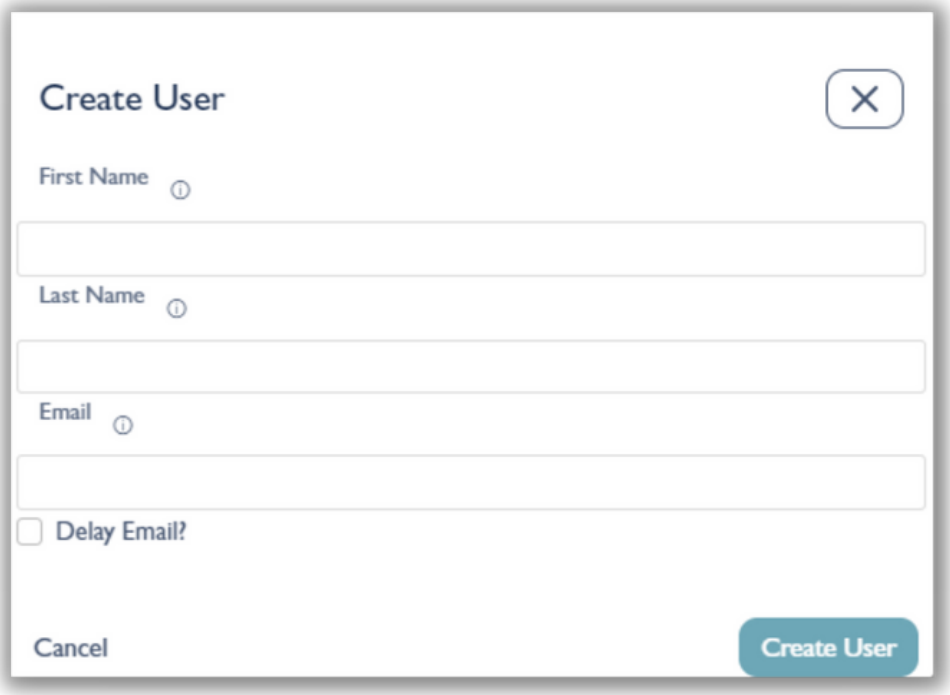
1. Click the "Add Student" button.



Students will get temporary access to Property Store and that would depend entirely on you. Once you delete them on your Students List via the Trash Icon, their access will be revoked.

2. Fill in the Create User Form.

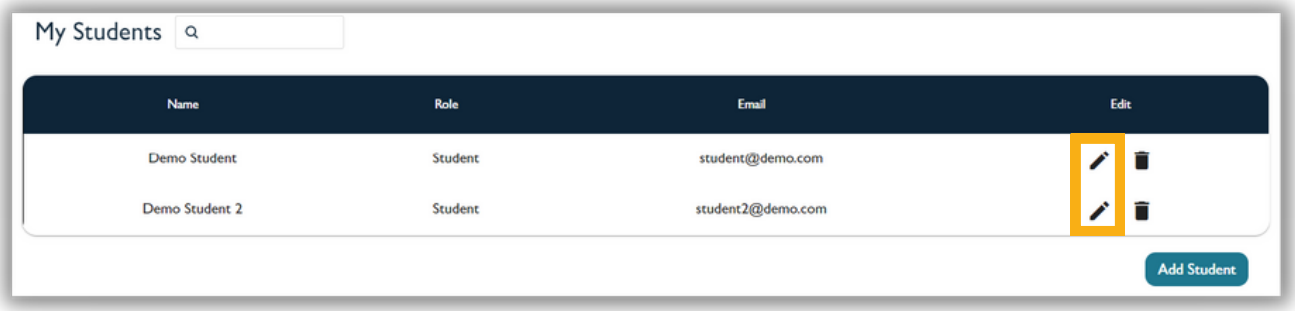
Upon clicking the button, the Create User form will pop up and simply fill in the name and email address of your students and they will receive an email to access Property Store. This process is very similar to when you are adding a new user to collaborate with (For accounts SILVER and above).



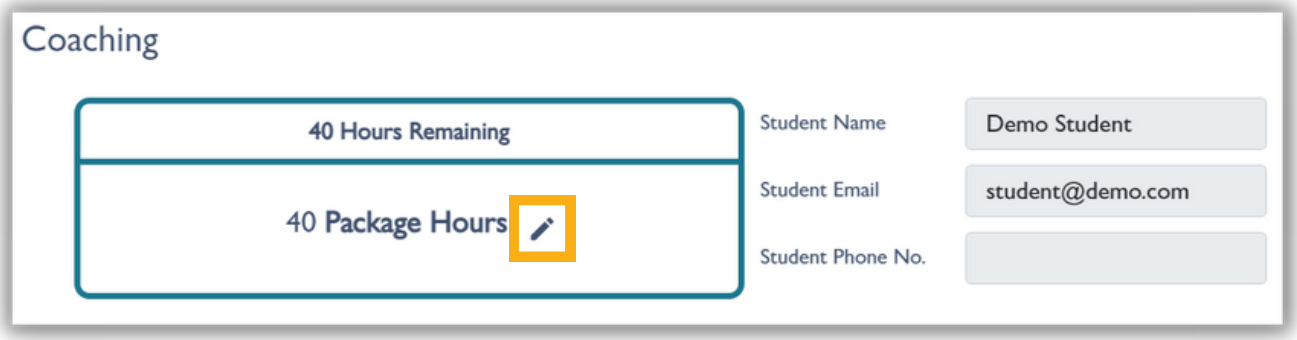
After entering their details, finish by clicking the "Create User" button and they will be added to your list.

3. Set your students' Package Hours.

Once your student is on the list, click the Pencil Icon beside their details as shown below:



You will be greeted with your student's details below. You may click the Pencil Icon to change their Package Hours.

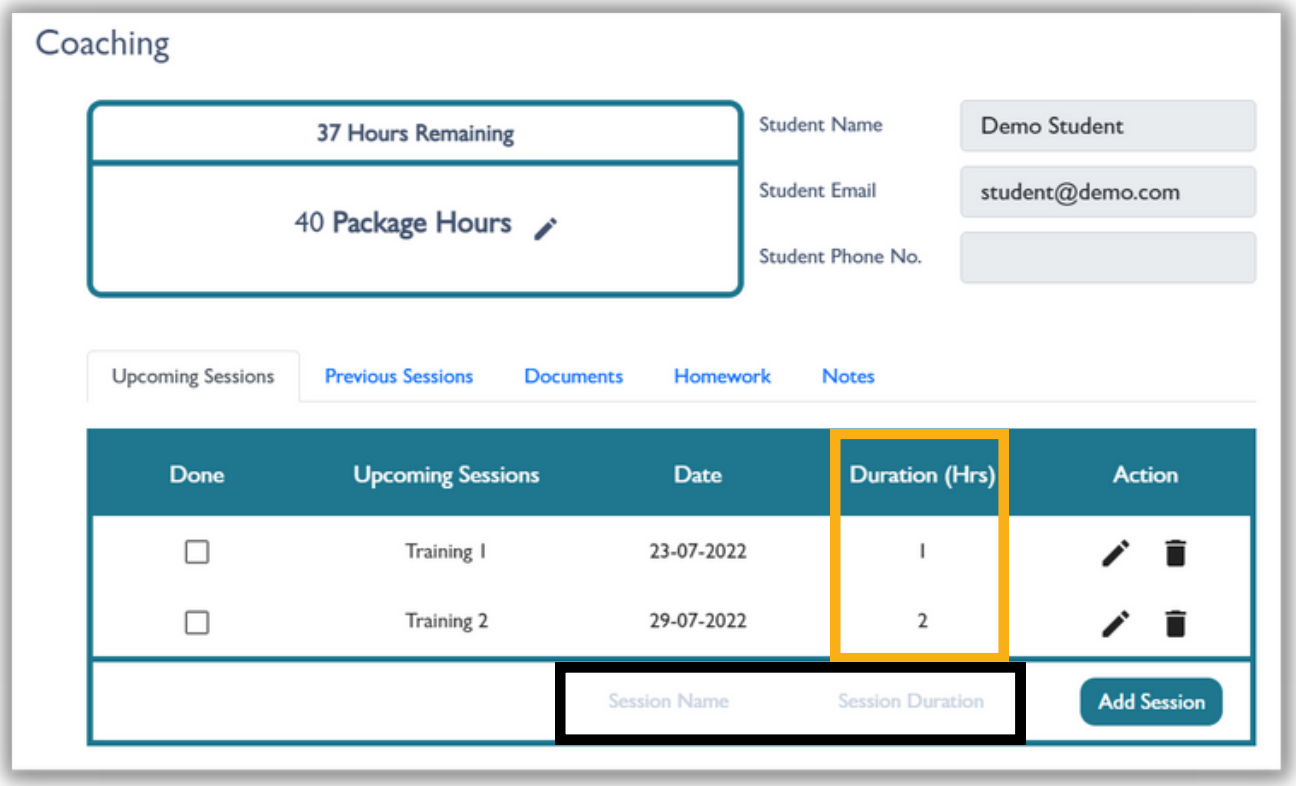


As you may have also noticed, Property Store will also track for you the remaining hours the student has in their package. Pretty useful if you don't take students by batch and teach them simultaneously.

COACHING

1. Set up the training plan for your student.

Below is an imaginary training plan for an imaginary student:

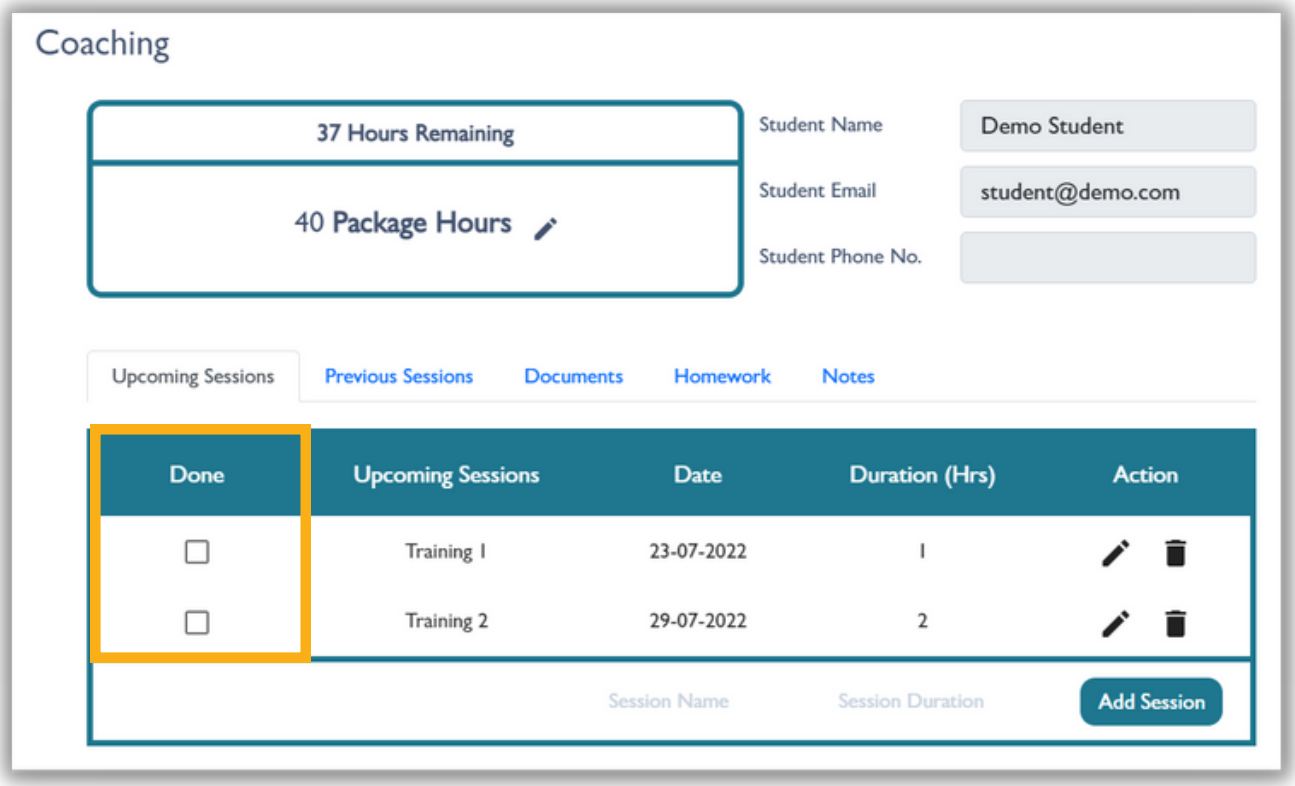


From the image, there are 3 hours worth of activities already in placed. As such, the hours remaining for the package was reduced to 37 hours. This way, it will be easier for you to setup your training plan.

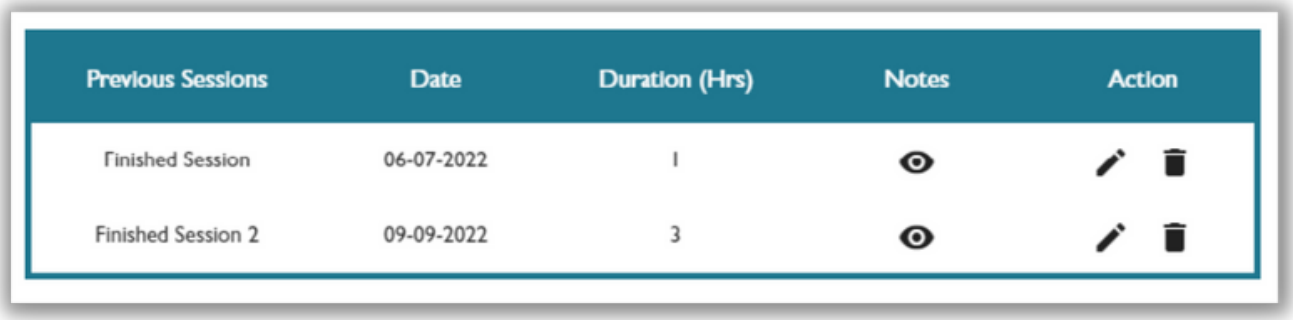
To add your own session, click the field where it says "Session Name" and "Session Duration" and type in the training plan and number of hours, respectively.

2. Archive finished sessions.

Once you are done with a session and you want them out of the way, you may tick the box on the leftmost column of the table and they will be moved to the Previous Sessions Tab, similar to archiving old TASKS.



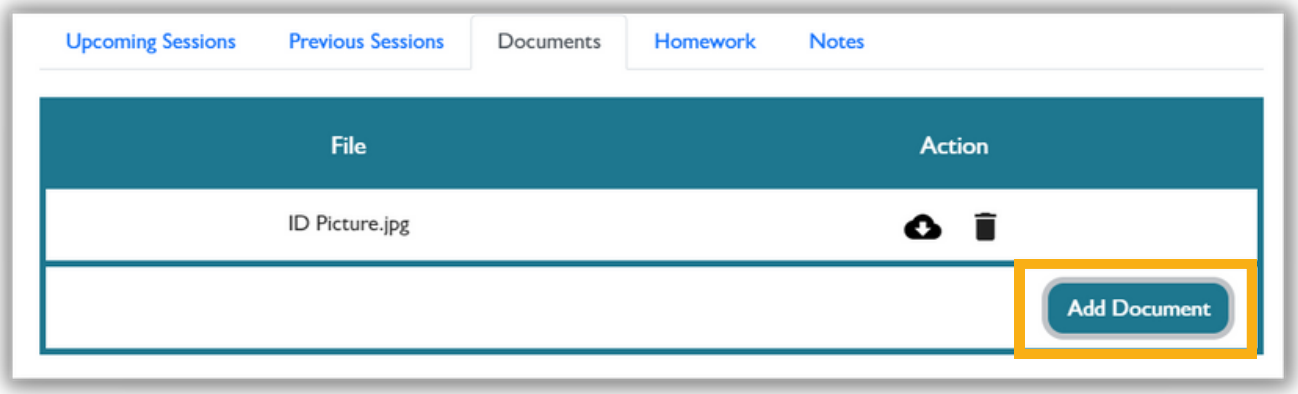
Below is what it looks like in the Previous Session Tab:



3. Upload files for your students or for you.

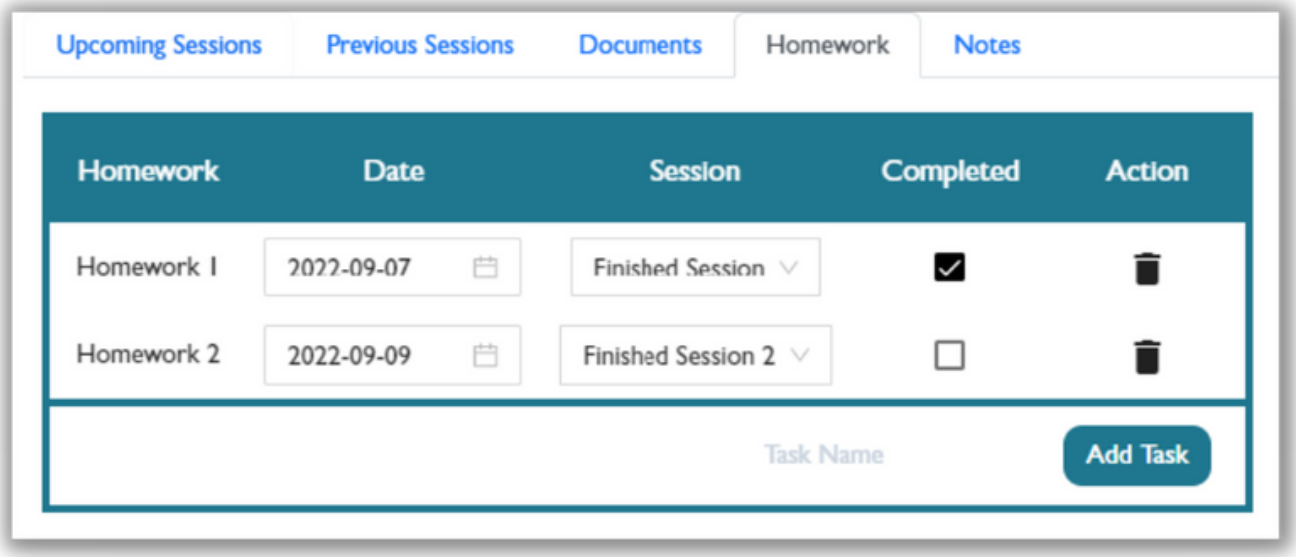
You can upload files for your students. It may be a copy of the teaching plan, a cheat sheet, or an assessment form. Whatever it maybe, you can use the Documents Tab for that. Students may upload their own documents too. Such as uploading an assessment form once its completed for you to check.

To upload any file, you may click the "Add Document" button.



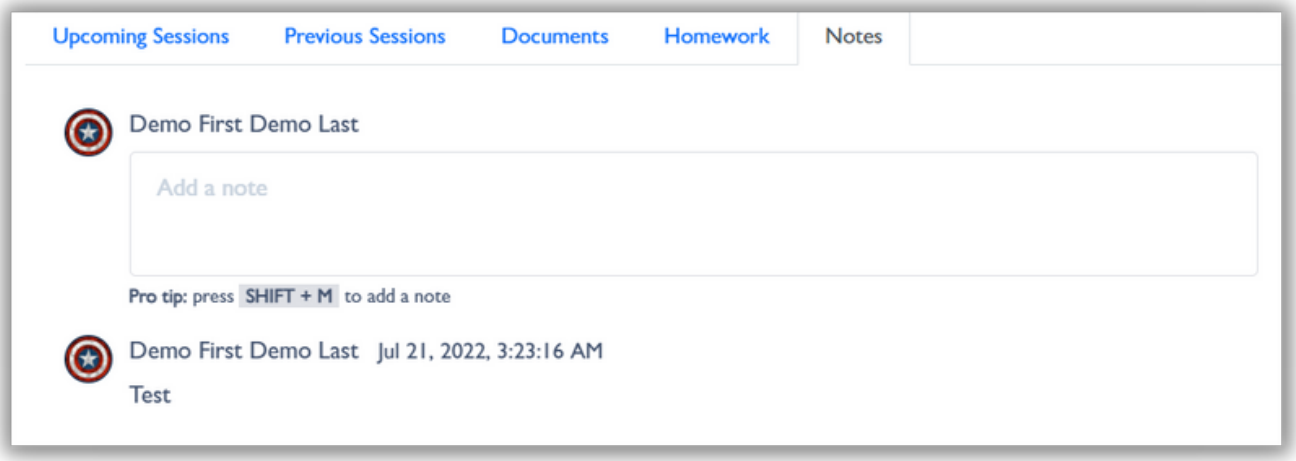
Similar to the DOCUMENTS Feature of Property Store, you may use the Download Icon to download the uploaded files.

4. Assign Homework to your students.



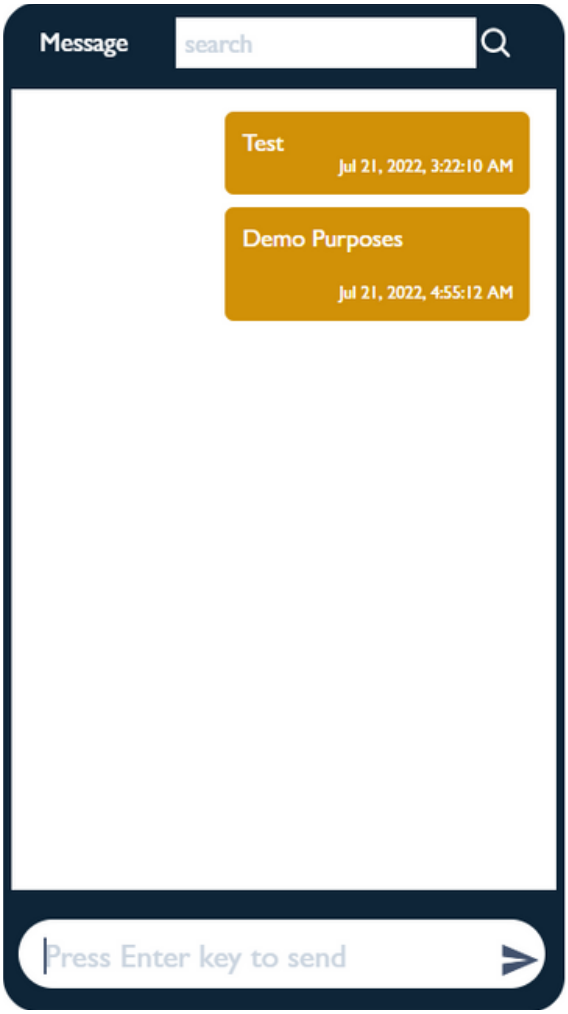
Homework creation is similar to sessions. These can be created, deleted, and marked as done by the coach. Students can only mark them as done. With these, you can track the progress of your students.

5. Exchange notes with your students.



You can exchange notes with your students in the Notes Tab. Useful for jotting down important details. Sent URLs are also clickable here.

6. Message your students via Property Store

You can also exchange messages with your students anytime or anywhere with Property Store via this phone.

In the FUTURE, these messages will also be sent via either SMS or email. This will only work if you have filled in the phone number or email of your student.