



**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

Email

Password

Forgot Password? Click to start account recovery

 Remember Me

## FORGOT PASSWORD

Click on "Forgot Password?"

2

Sign in with your email and password

Email

Password

Forgot your password?

## FORGOT PASSWORD 2

Click on "Forgot your Password"

3

Forgot your password?

Enter your Email below and we will send a message to reset your password

## ENTER YOUR EMAIL

Enter email to receive reset code

4

We have sent a password reset code by email to r\*\*\*@e\*\*\*. Enter it below to reset your password.

Code

New Password

Enter New Password Again

## NEW PASSWORD

Enter password twice to confirm.

5

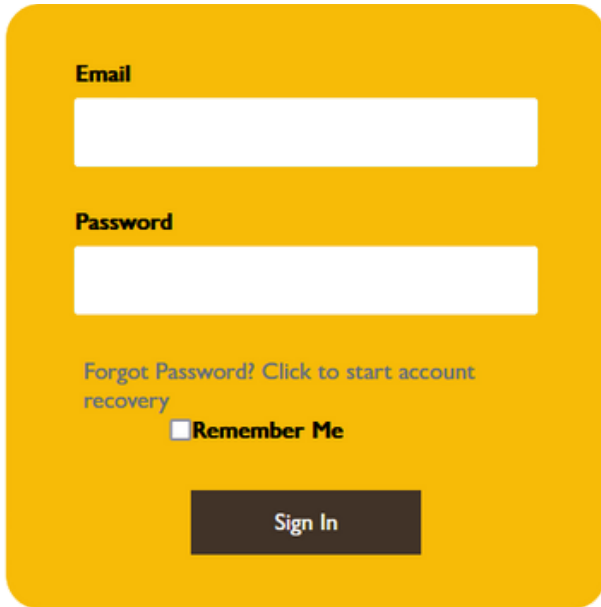
OK!

## YOU ARE DONE!

You may now start using Property Store



# LOGGING IN



A yellow rounded rectangle representing a login form. It contains two empty input fields labeled "Email" and "Password". Below the password field is a link "Forgot Password? Click to start account recovery" and a checkbox labeled "Remember Me". At the bottom is a dark grey button labeled "Sign In".

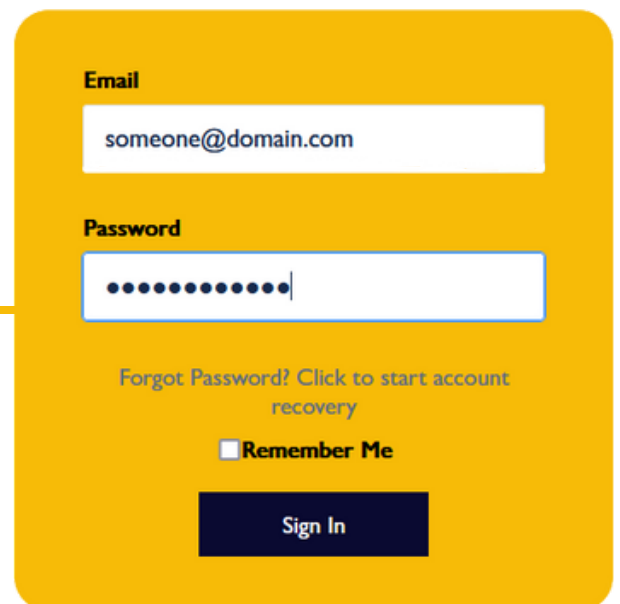
1

**GO TO THE WEBSITE**

<https://crm.propertystoreapilb.co.uk>

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

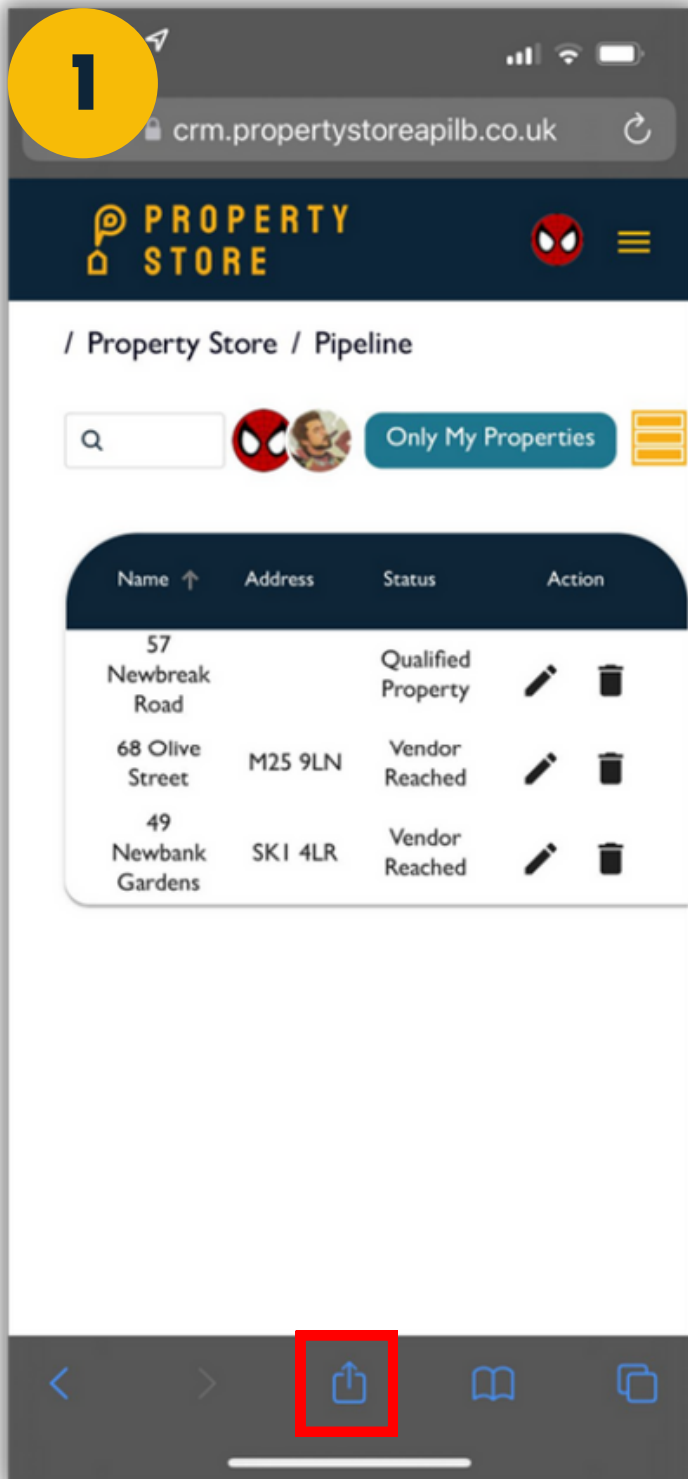
2



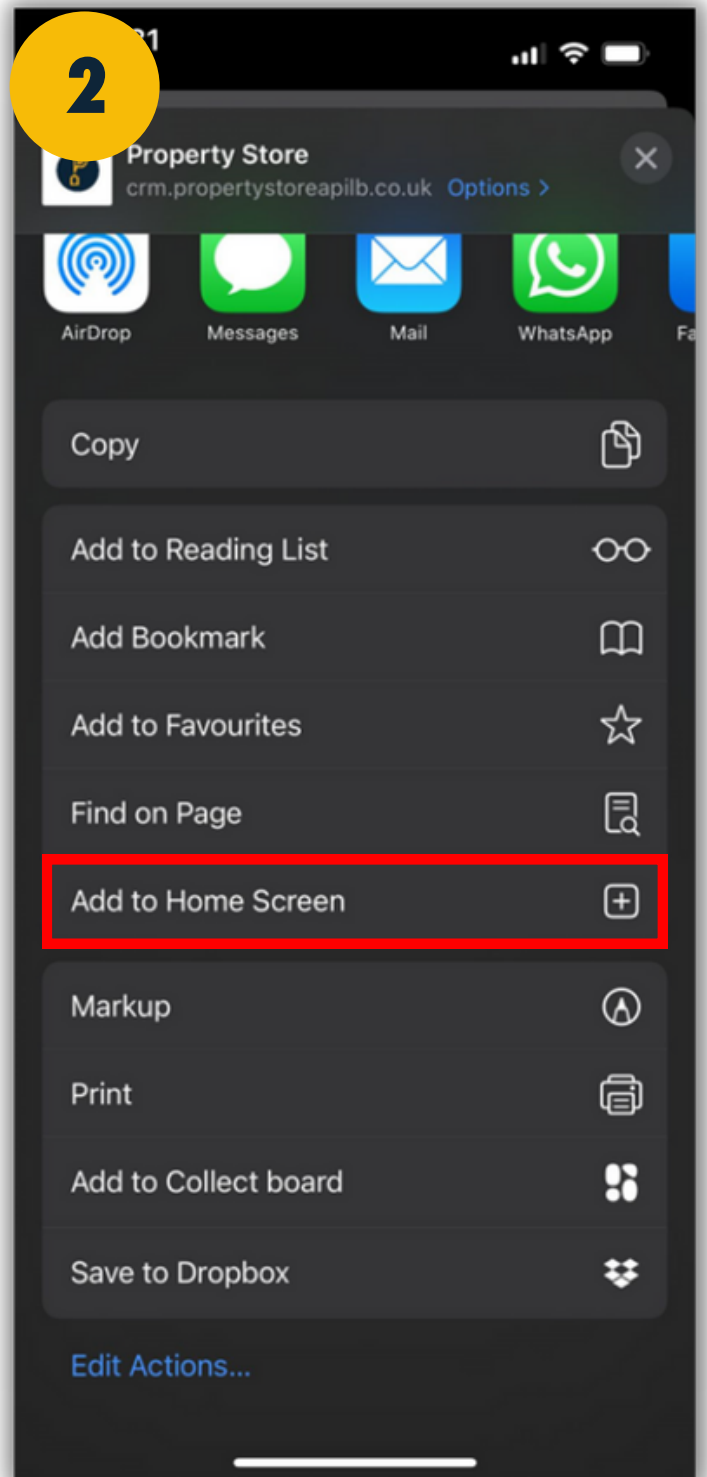
A yellow rounded rectangle representing a login form. The "Email" field contains the text "someone@domain.com". The "Password" field contains a series of dots. Below the password field is a link "Forgot Password? Click to start account recovery" and a checkbox labeled "Remember Me". At the bottom is a dark blue button labeled "Sign In".

**DONE!**

# SAVING CRM AS AN 'APP'

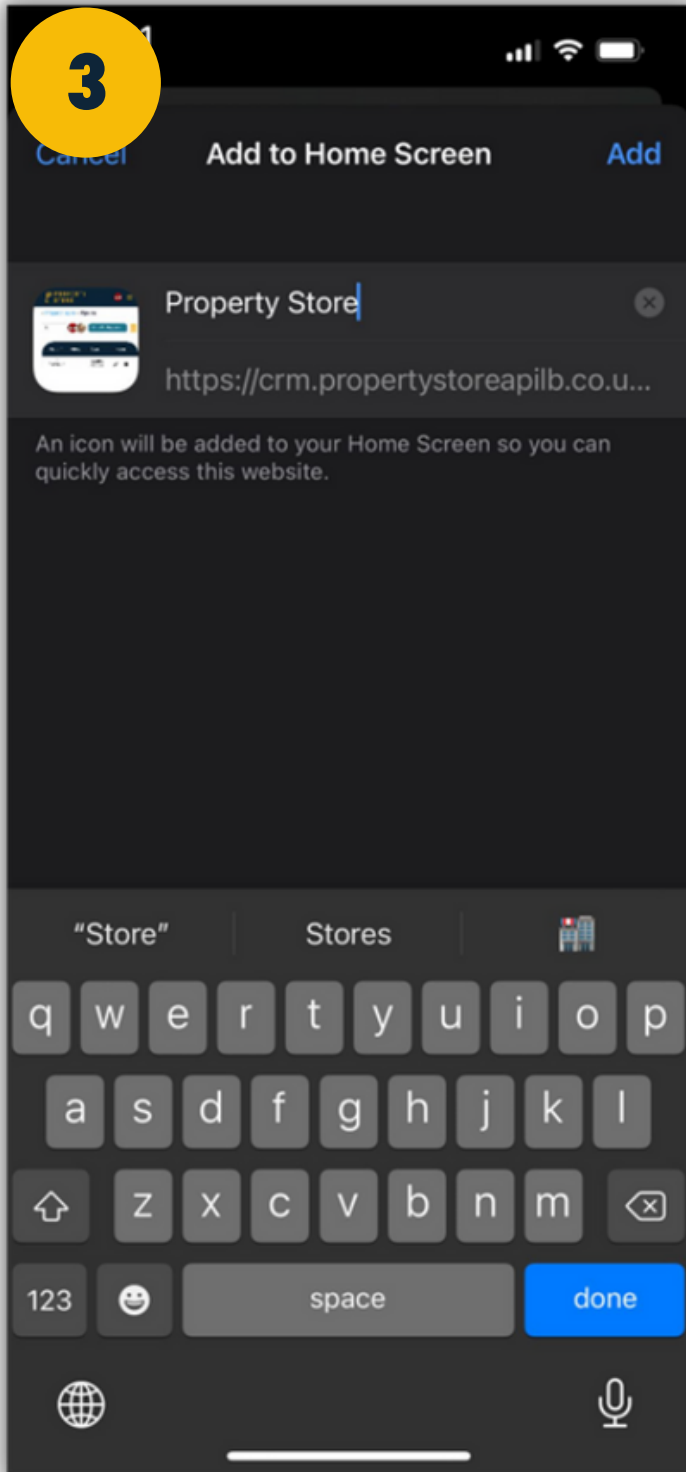


- Visit <https://crm.propertystoreapilb.co.uk/>
- Click the 'SHARE Button' at the bottom of the screen

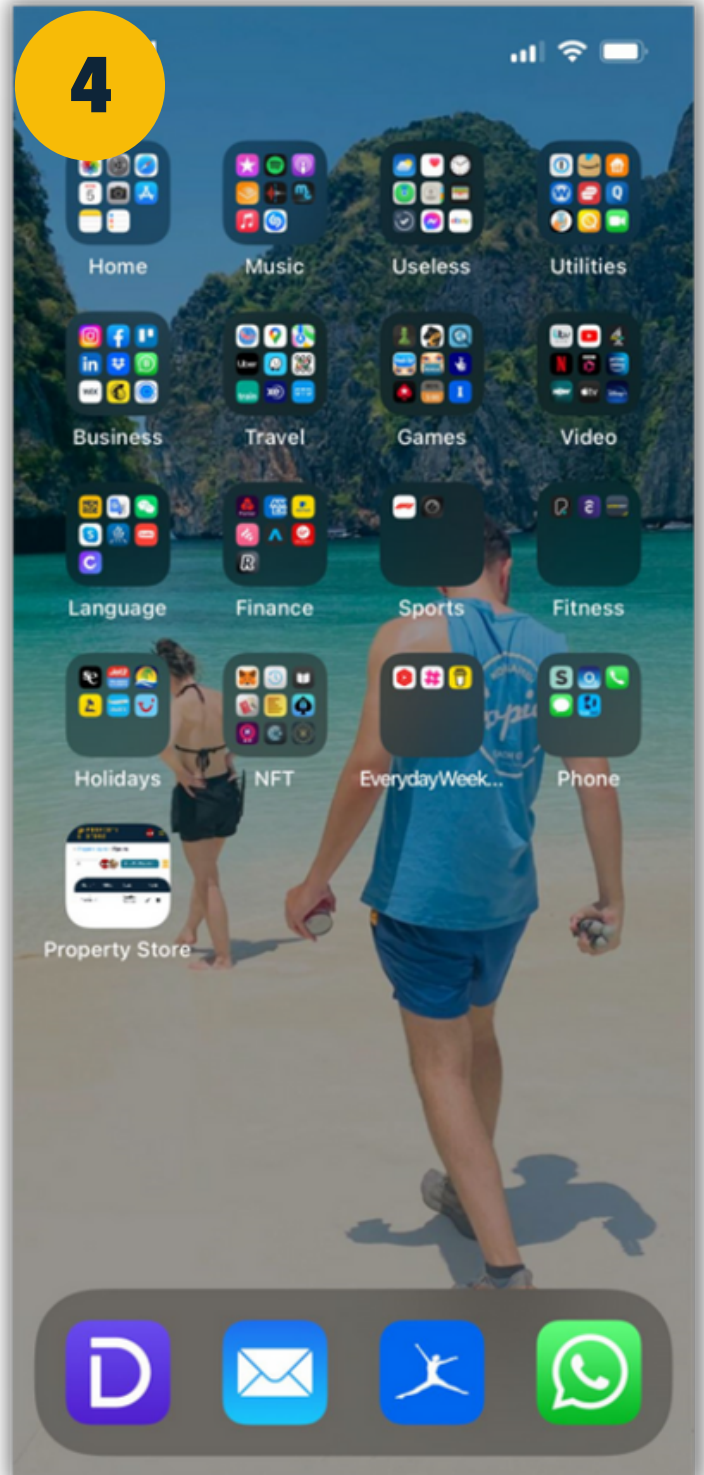


- Click 'Add to Home Screen'

# SAVING CRM AS AN 'APP'



- Set a name for the 'App'




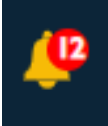







- You will now see Property Store as an 'App' on your Home Screen

# 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**.

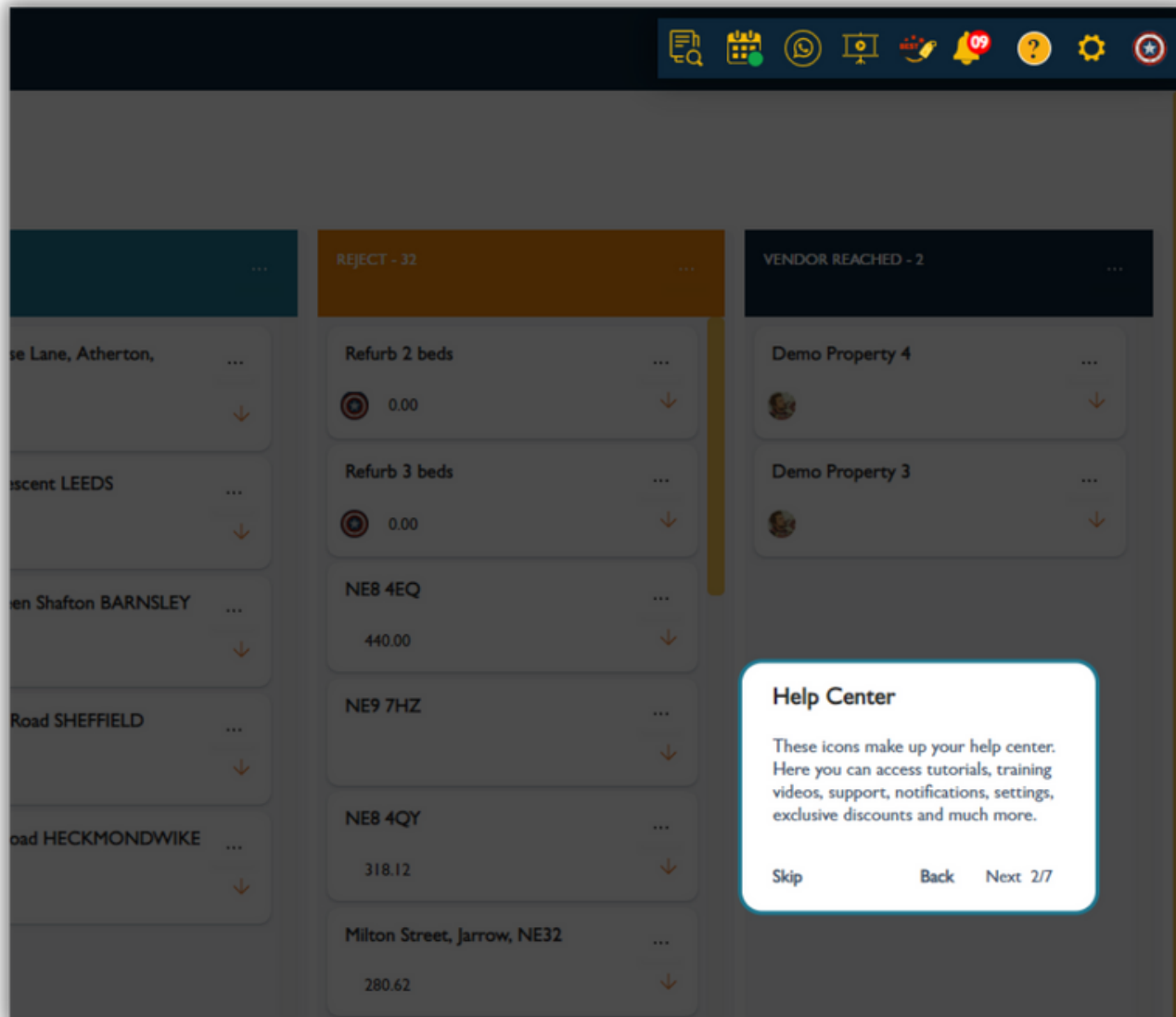


The **HELP CENTER** is located at the upper right portion of Property Store. Starting from the left, the icons are:

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



## 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

The screenshot displays the booking interface for 'Property Store Team 1-1'. On the left, there is a profile card with the Property Store logo, the team name, and a 45-minute duration. A message instructs users to use a specific link for a 1-1 demo. Below the calendar, there is a 'Time zone' dropdown menu set to 'UK, Ireland, Lisbon Time (1:32pm)'. The calendar shows December 2022 with the 15th highlighted. To the right of the calendar, a list of time slots is available for booking, ranging from 10:30am to 12:30pm in 15-minute increments.

SUN	MON	TUE	WED	THU	FRI	SAT
				1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	31

Time zone: UK, Ireland, Lisbon Time (1:32pm)

Time slots: 10:30am, 10:45am, 11:00am, 11:15am, 11:30am, 11:45am, 12:00pm, 12:15pm, 12:30pm

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.

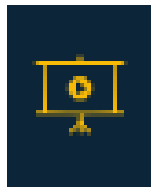
# WHATSAPP SUPPORT



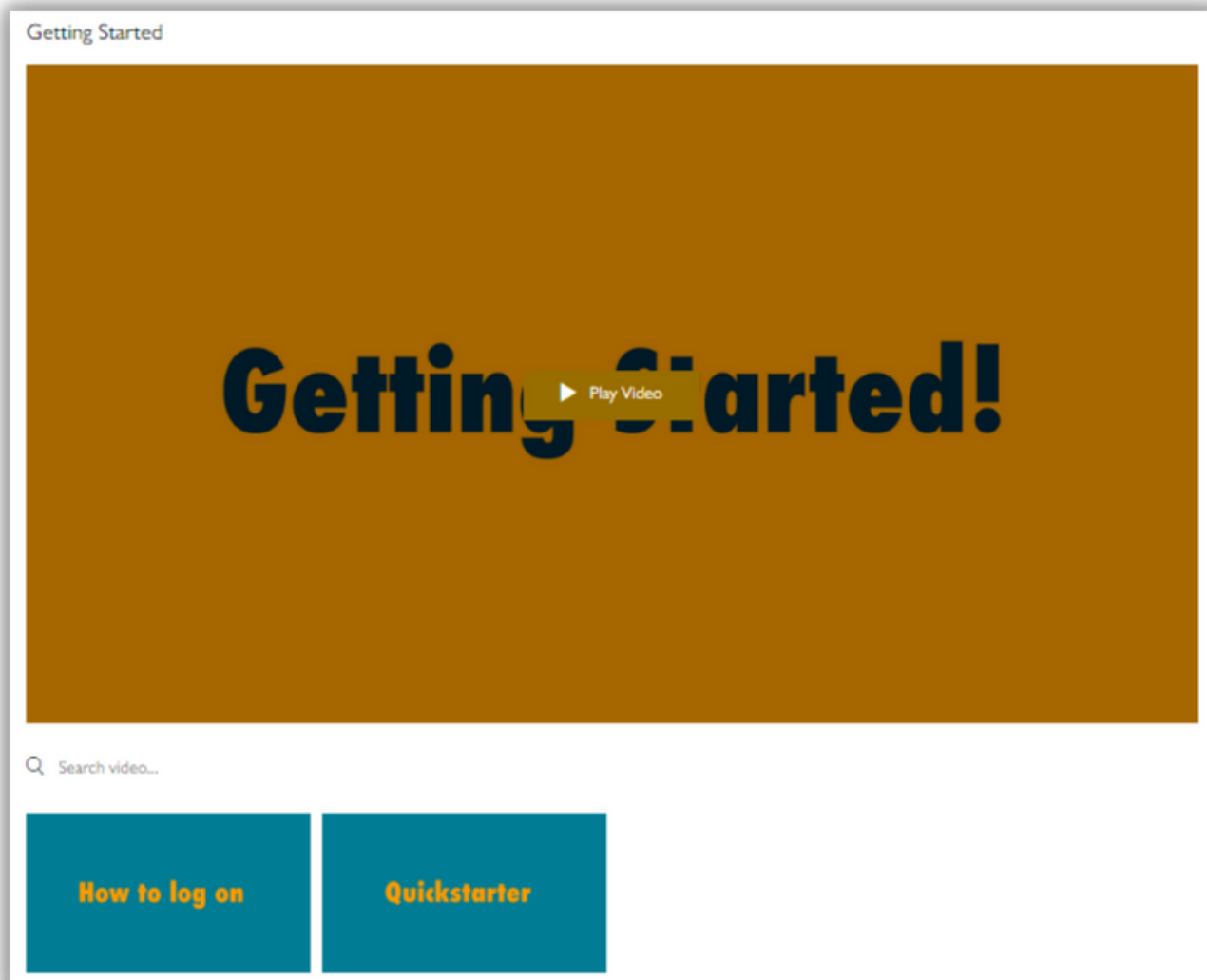
## Property Store WhatsApp Business Account



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.



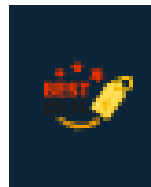
## Property Store Training Videos



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](mailto:Dan@koveproperties.com)

### Inventory and Reporting



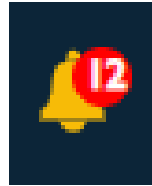
As a member of Property Store, you will receive 20% off an annual package with Hello Report. All you need to do is sign up at [www.helloreport.co.uk](http://www.helloreport.co.uk)

Contact: [www.helloreport.co.uk](http://www.helloreport.co.uk)

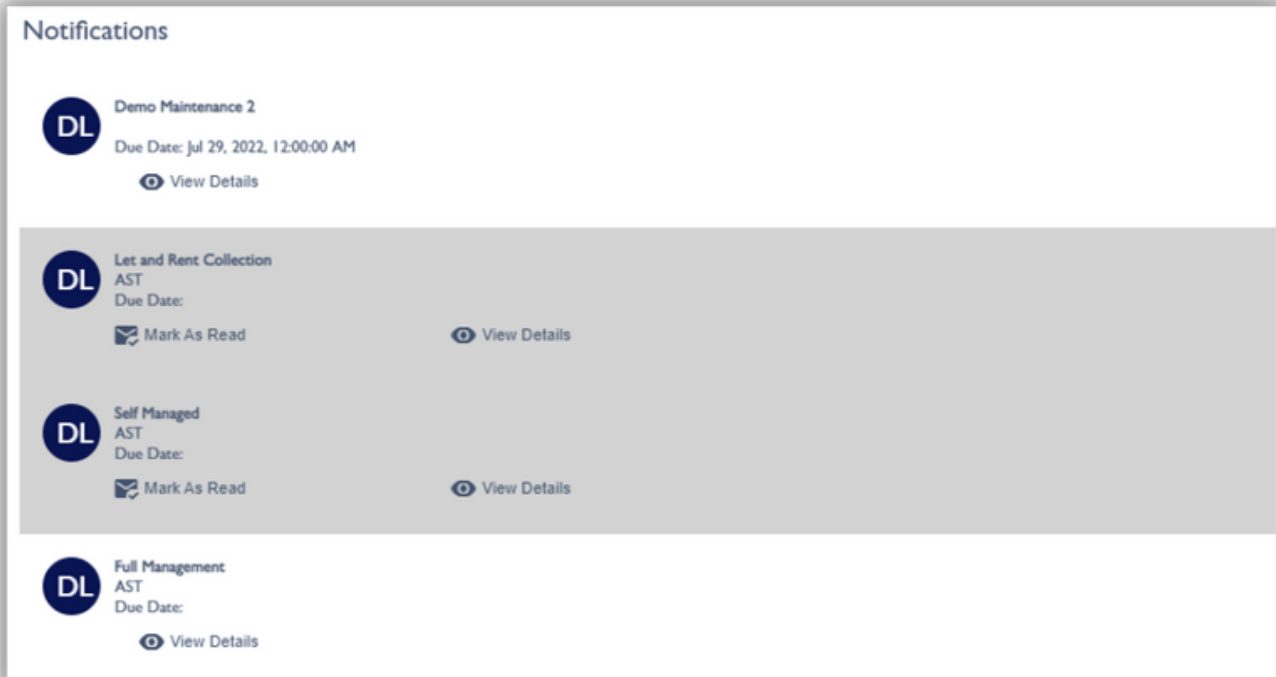
Property Store Members are eligible for discounts across multiple companies that are just as passionate with Property as we are. All of these businesses have been curated by us and have agreed to offer discounts only applicable for users of Property Store.

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.

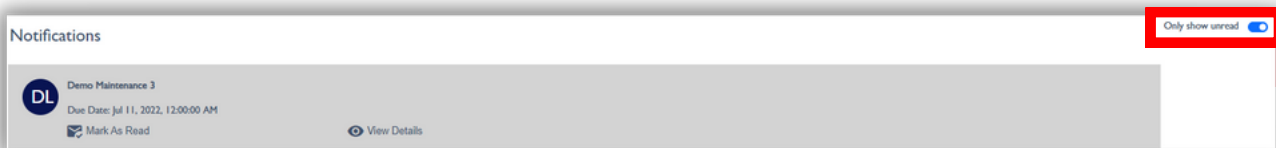
# NOTIFICATIONS



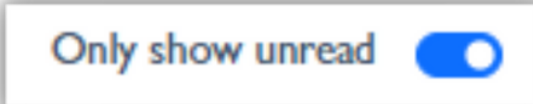
## Property Store Notifications



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.

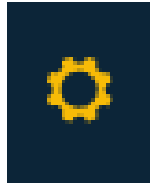


## Giving Feedback

A screenshot of a 'Support/Feedback' form. The form has a title bar with 'Support/Feedback' and a close button (X). It contains three main sections: 'Title' with a text input field containing a vertical bar; 'Priority' with a dropdown menu showing 'MEDIUM' and a downward arrow; and 'Additional Comments' with a large text area. At the bottom right, there are two buttons: 'Raise Support' (teal) and 'Cancel' (grey).

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

My Account | User Account | Settings | Coach Settings | Automation | Import/Export

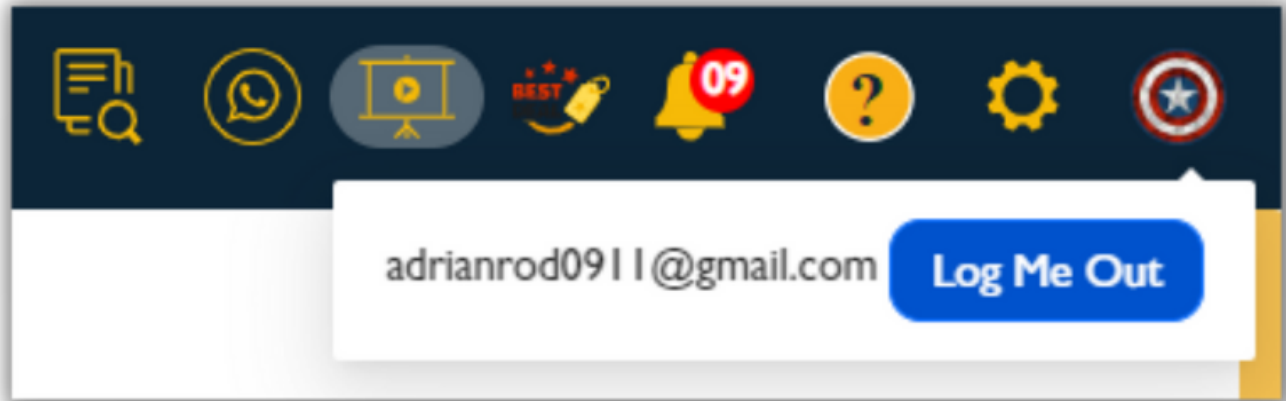
Support

Personal Details | Account Security | Subscription

ID	USR-00679	
First Name	Adrian Clark	<input type="checkbox"/> *
Last Name	Rodriguez	<input type="checkbox"/> *
Email	adrianrod0911@gmail.com	<input type="checkbox"/> *
Email Reminder	<input type="checkbox"/>	<input type="checkbox"/> *
Role	Sourcer	<input checked="" type="checkbox"/> *
Mobile		<input type="checkbox"/> *
Country		<input type="checkbox"/> *
Home Location	SK12 IUT	<input checked="" type="checkbox"/> *
Principle Investment Area(s)	Please select investment area	<input type="checkbox"/> *
Principle Investment Region(s)	Please select investment region	<input type="checkbox"/> *
Company Logo	<input type="button" value="Add Logo"/>	
Avatar		

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.

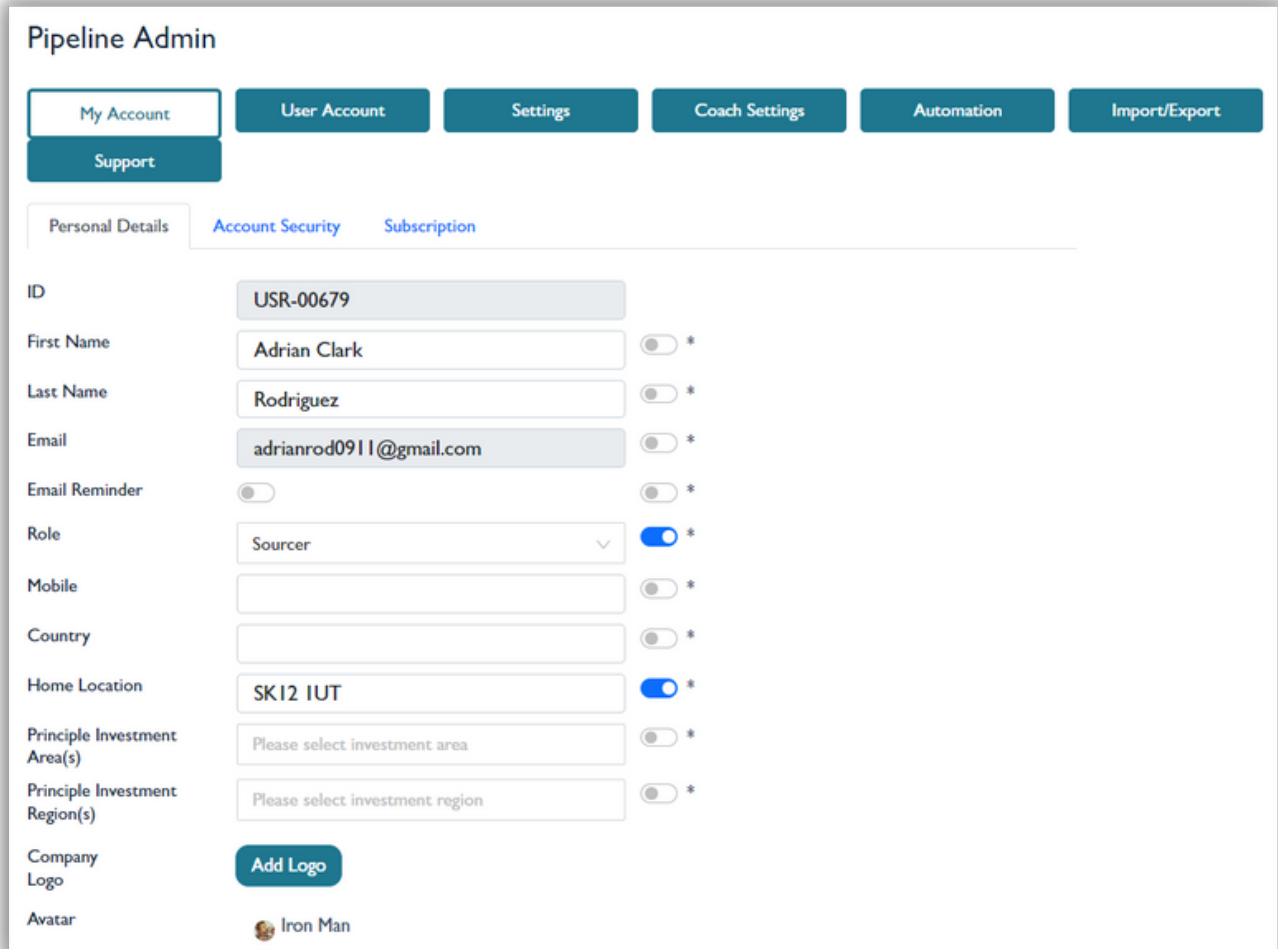
# USER ACCOUNT



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.



The screenshot shows the 'Pipeline Admin' interface. At the top, there are several navigation buttons: 'My Account', 'User Account', 'Settings', 'Coach Settings', 'Automation', and 'Import/Export'. Below these, there are tabs for 'Personal Details', 'Account Security', and 'Subscription'. The 'Personal Details' tab is active, showing a form with the following fields and values:

- ID: USR-00679
- First Name: Adrian Clark
- Last Name: Rodriguez
- Email: adrianrod0911@gmail.com
- Email Reminder: (toggle off)
- Role: Sourcer (dropdown menu)
- Mobile: (empty field)
- Country: (empty field)
- Home Location: SKI2 IUT
- Principle Investment Area(s): Please select investment area
- Principle Investment Region(s): Please select investment region
- Company Logo: Add Logo button
- Avatar: Iron Man

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

## I. Editing your Account Details.

Personal Details
Account Security
Subscription

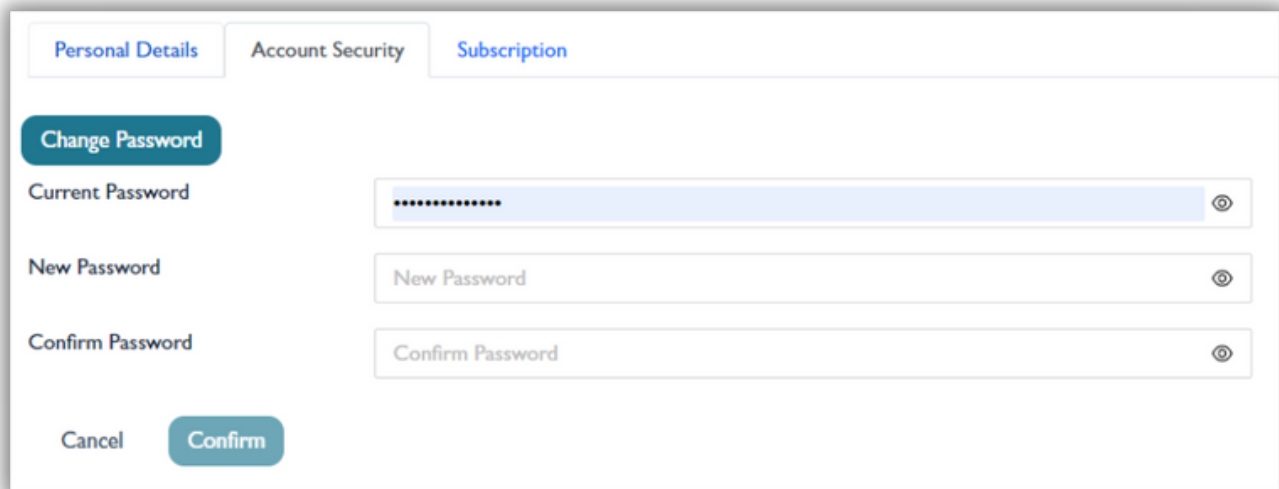
ID	<input type="text" value="USR-00679"/>	
First Name	<input type="text" value="Demo First"/>	<input type="checkbox"/> *
Last Name	<input type="text" value="Demo Last"/>	<input type="checkbox"/> *
Email	<input type="text" value="adrianrod0911@gmail.com"/>	<input type="checkbox"/> *
Email Reminder	<input type="checkbox"/>	<input type="checkbox"/> *
Role	<input style="border: none; border-bottom: 1px solid #ccc; padding: 5px 5px 5px 20px;" type="text" value="Coach"/> <span style="float: right;">v</span>	<input checked="" type="checkbox"/> *
Mobile	<input type="text"/>	<input type="checkbox"/> *
Country	<input type="text"/>	<input type="checkbox"/> *
Home Location	<input type="text" value="SK12 IUT"/>	<input checked="" type="checkbox"/> *
Principle Investment Area(s)	<input type="text" value="Please select investment area"/>	<input type="checkbox"/> *
Principle Investment Region(s)	<input type="text" value="Please select investment region"/>	<input type="checkbox"/> *
Company Logo	<input type="button" value="Add Logo"/>	
Avatar	Iron Man	

\*Please ensure you delete relevant data in accordance with local GDPR laws

\*By switching this on you are confirming that you are happy to share this information with others using the platform for the purposes of networking

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.

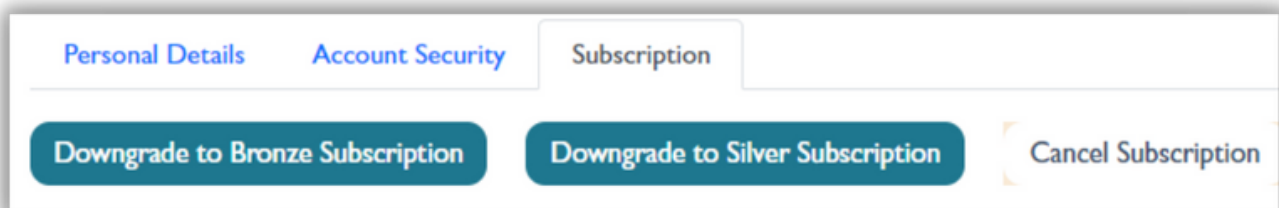
## 2. Changing your password.



The screenshot shows the 'Account Security' tab selected. At the top, there are three tabs: 'Personal Details', 'Account Security', and 'Subscription'. Below the tabs, there is a 'Change Password' button. The form consists of three input fields: 'Current Password' (filled with dots), 'New Password', and 'Confirm Password'. Each field has a toggle icon on the right. At the bottom, there are 'Cancel' and 'Confirm' buttons.

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

## 3. Changing your subscription.



The screenshot shows the 'Subscription' tab selected. At the top, there are three tabs: 'Personal Details', 'Account Security', and 'Subscription'. Below the tabs, there are three buttons: 'Downgrade to Bronze Subscription', 'Downgrade to Silver Subscription', and 'Cancel 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

## I. 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.

First Name	Last Name	Role	Email	Email Reminder	Action
Demo First	Demo Last	Coach	adrianrod0911@gmail.com	<input type="checkbox"/>	
Demo	User		demo@gmail.com	<input type="checkbox"/>	

[Add User](#)

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

### Create User ✕

First Name ⓘ

Last Name ⓘ

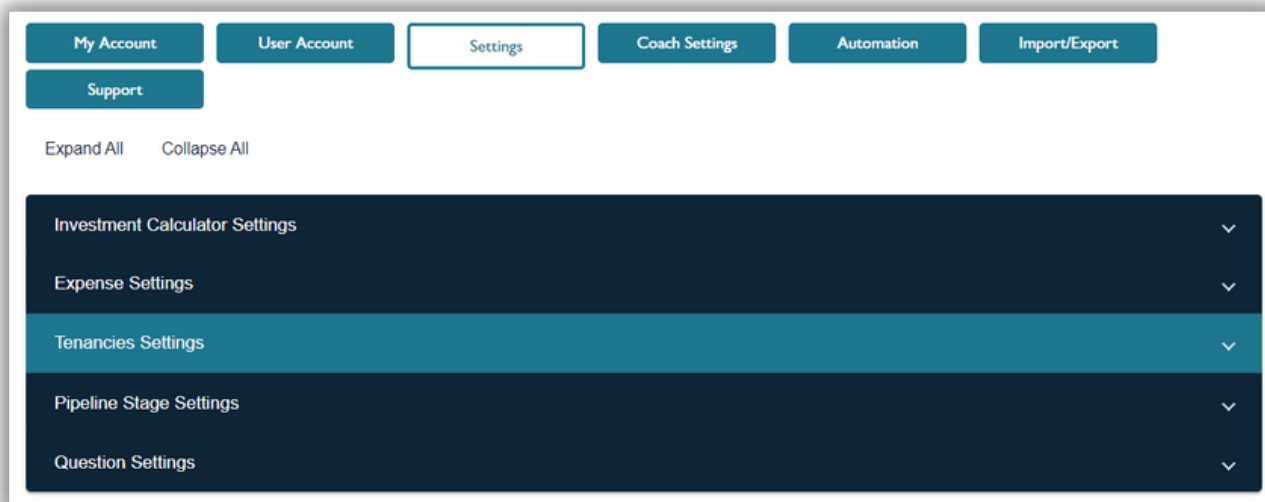
Email ⓘ

[Cancel](#) [Create User](#)

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.



## I. Investment Calculator Settings

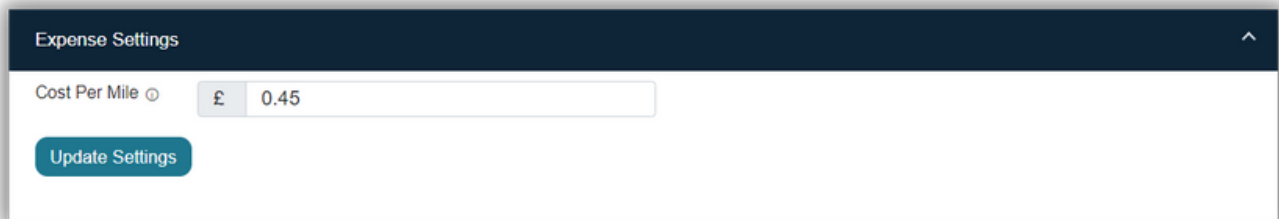
A screenshot of the 'Investment Calculator Settings' form. The form contains several input fields, each with a dropdown menu for units or currency. The settings are as follows:

Setting	Unit	Value
Deposit Percent	%	25
Fees	£	1500
Project Management Fees	£	1000
Mortgage Interest Min	%	3
Mortgage Interest Max	%	6
MOE	%	10
Management Fees	%	10
Legal Fees	£	1000
Survey	£	400
Re-finance LTV	%	75

At the bottom of the form, there is a teal button labeled 'Update Settings'.

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

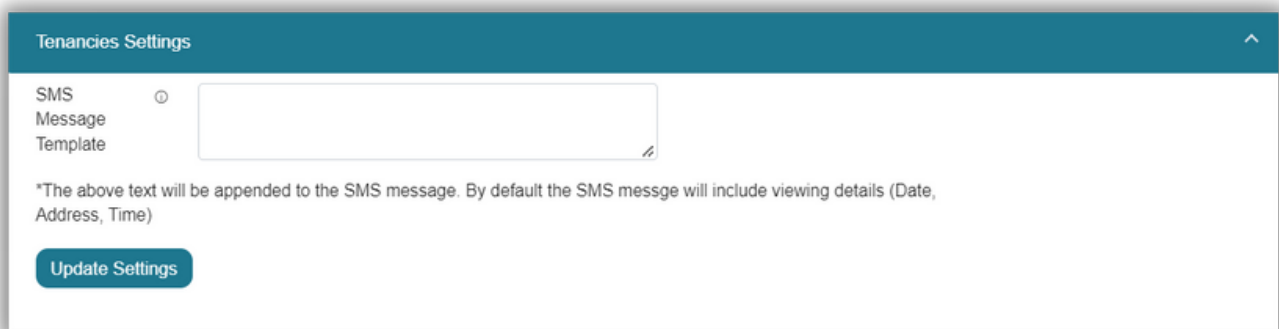
## 2. Expense Settings



The screenshot shows the 'Expense Settings' interface. At the top, there is a dark blue header with the text 'Expense Settings' and an upward-pointing arrow. Below the header, the label 'Cost Per Mile' is followed by a currency selector set to '£' and a text input field containing the value '0.45'. At the bottom of the form is a blue button labeled 'Update 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.

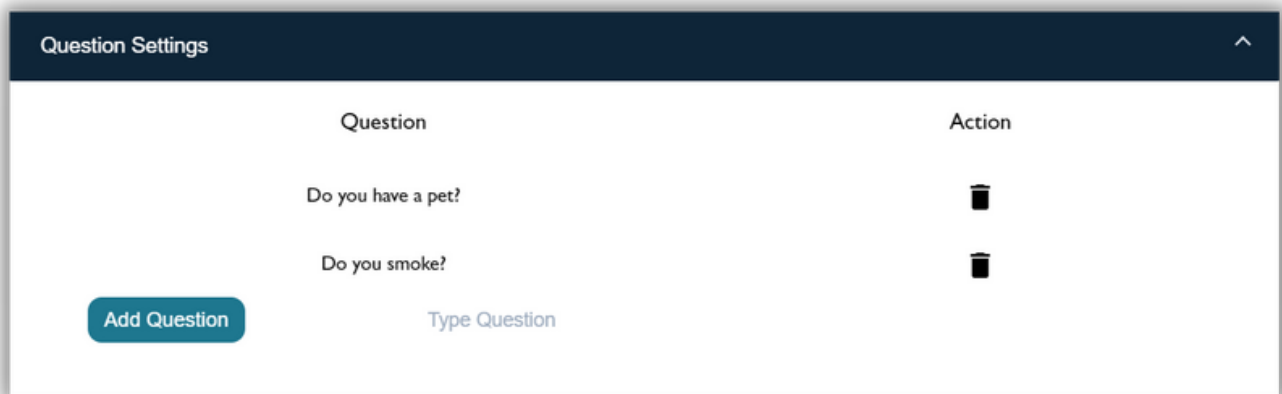
## 3. Tenancies Settings



The screenshot shows the 'Tenancies Settings' interface. At the top, there is a teal header with the text 'Tenancies Settings' and an upward-pointing arrow. Below the header, the label 'SMS Message Template' is followed by a large text input field. Below the input field, there is a note: '\*The above text will be appended to the SMS message. By default the SMS message will include viewing details (Date, Address, Time)'. At the bottom of the form is a blue button labeled 'Update 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.

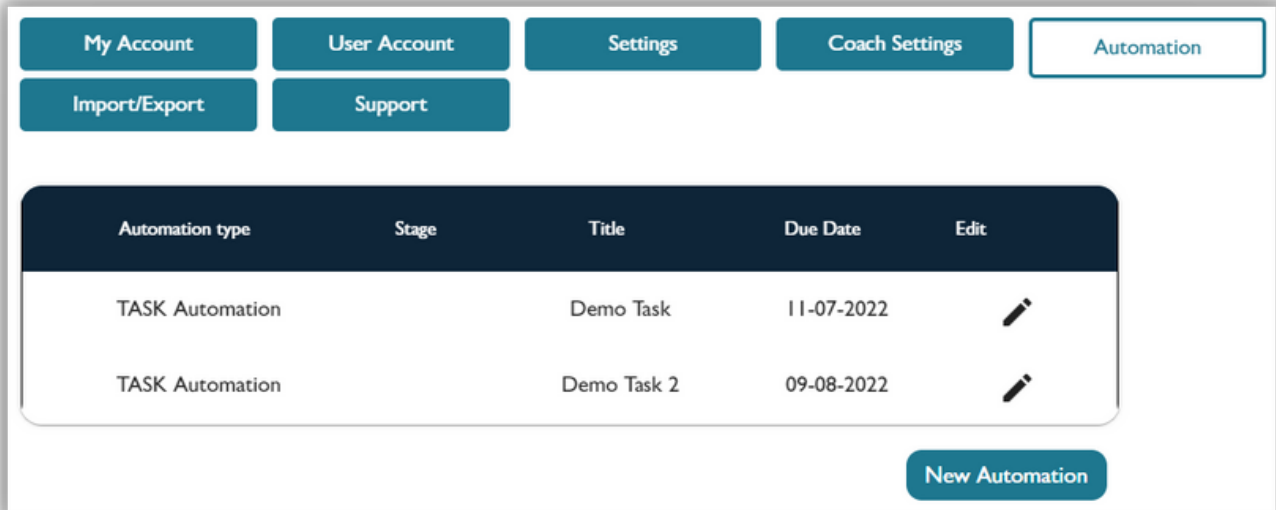
## 4. Question Settings



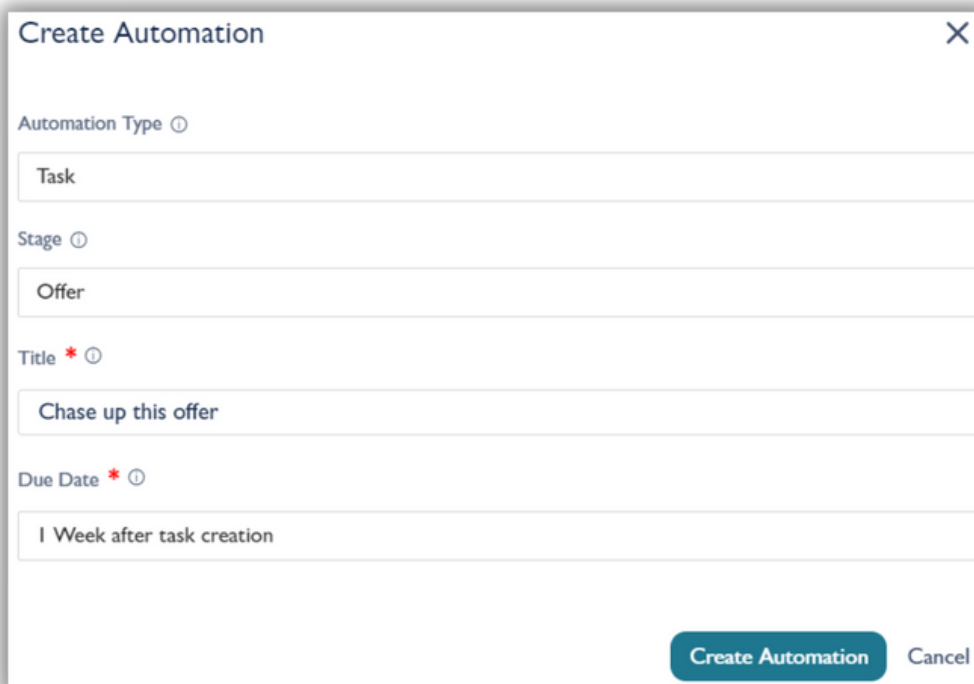
You can add or remove your default questions here for your prospective tenants so that you don't need to type it out for each tenant.

# 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:

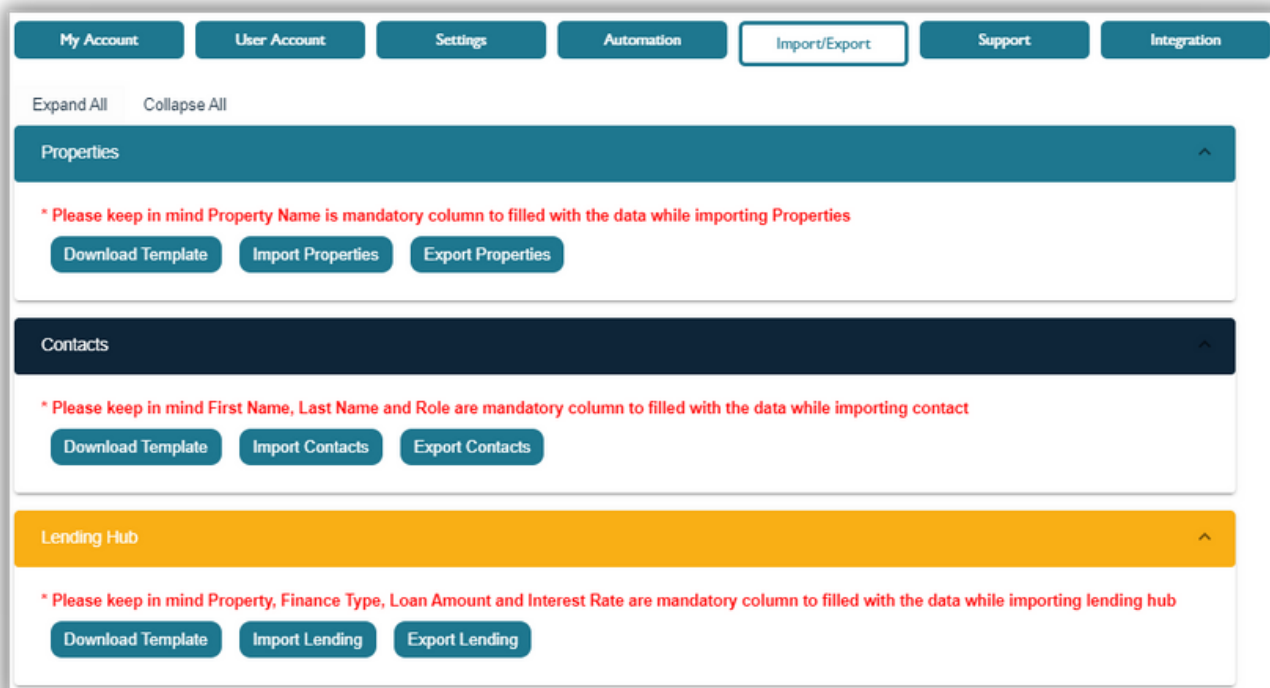


If we fill in the CREATE AUTOMATION form this way, what this means is that we want the system to create a TASK that would remind me 1 week after task creation to Chase up this offer whenever I move a property in my PIPELINE to the Offer Stage. What I created is a reminder to contact the seller again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



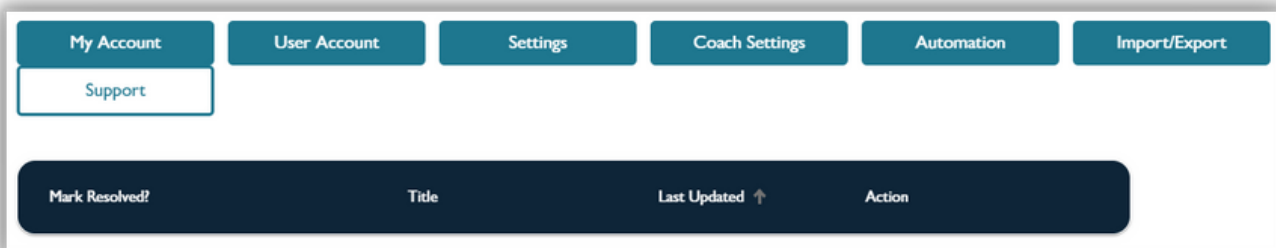
Click the "Download Template" button and you will get a spreadsheet that is pre-formatted. Fill that spreadsheet with your property details and then click the "Import Properties" button to upload that spreadsheet to Property Store and the system will add your portfolio to your PIPELINE.

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

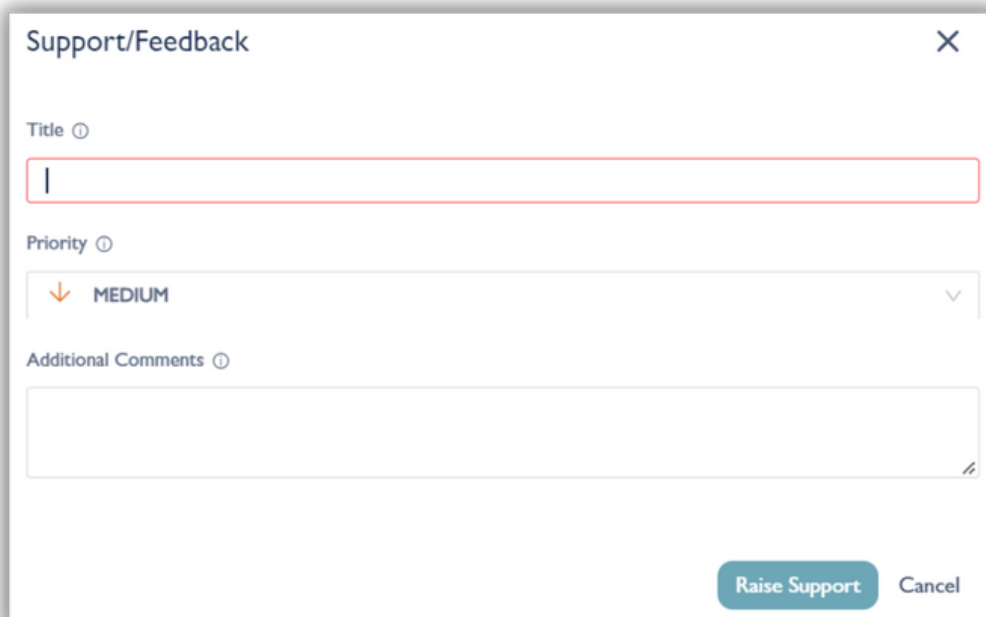
This tab is where all your support tickets for Property Store will be located in case you encounter any errors or bugs while using the CRM.



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:

A screenshot of a 'Support/Feedback' form. The form has a title bar with 'Support/Feedback' and a close button (X). It contains three main sections: 'Title' with a text input field containing a vertical bar; 'Priority' with a dropdown menu set to 'MEDIUM'; and 'Additional Comments' with a large text area. At the bottom right, there are two buttons: 'Raise Support' and 'Cancel'.

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.

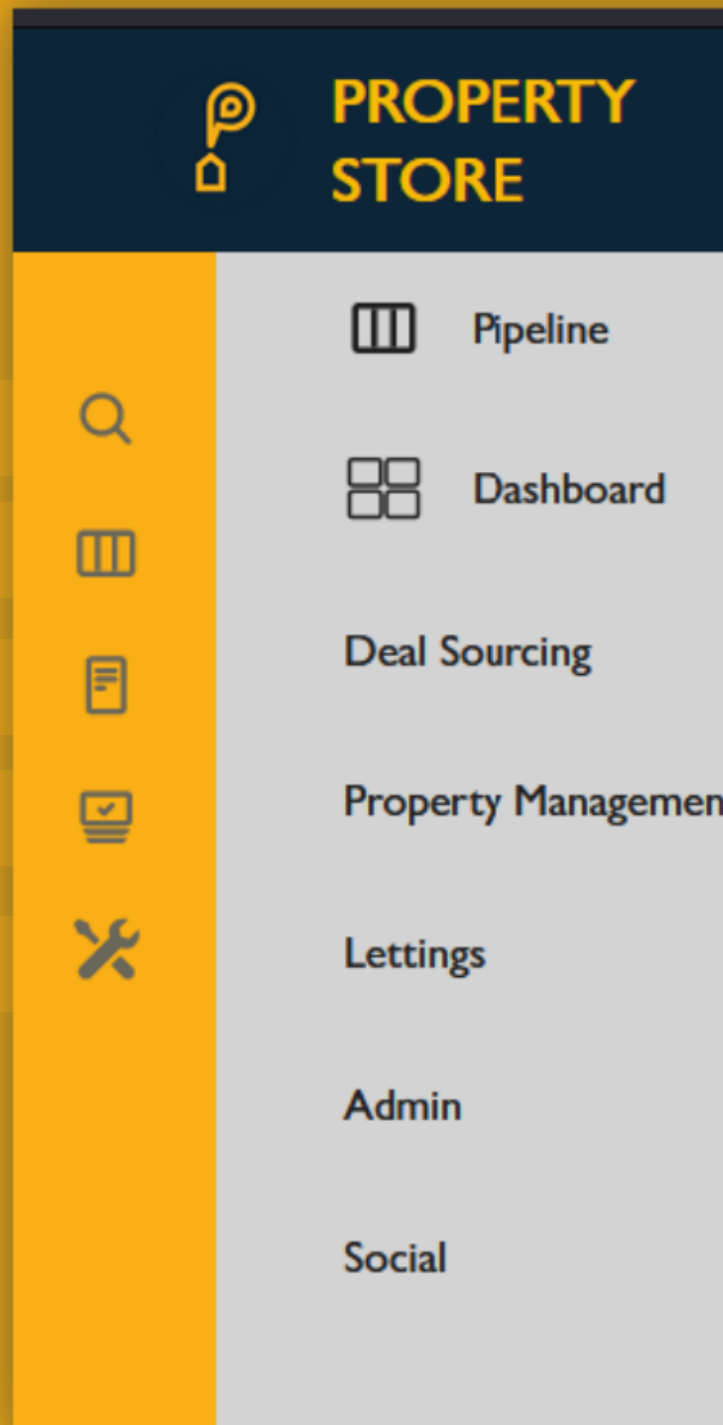
SEARCH PROPERTIES

ADD PROPERTY

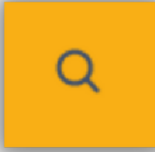
CREATE CONTACT

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:

Add Property X

Property Name \* ⓘ

Demo Property

Show Additional

Add Property Cancel

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

Hide Additional

Priority ⓘ

MEDIUM

Listing Link ⓘ

Property Owner ⓘ

Status ⓘ

Qualified Property

Property Type ⓘ

Property Area ⓘ

Property Address ⓘ

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.

Create Contact

Title

Pronoun

First Name \*

Last Name

Email

Role \*

Show Additional

Create Contact Cancel

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:

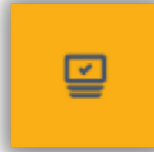
Contacts

General Tenant Prospective Tenant

Name	Company	Role	Email	Phone	Action
Demo Contact		Estate Agent	Demo@demo.com		<input type="button" value="edit"/> <input type="button" value="delete"/>

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

**Title** \* ⓘ

**Reminders** ⓘ

**Recurring Task** ⓘ

**Recurring Due Date** ⓘ

**Associated With Property** ⓘ

**Associated With User** ⓘ

**Associated With Contact** ⓘ

**Notes** ⓘ

**Due Date** \* ⓘ

Choose a date  
 27/07/2022

Create Task
Cancel

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

Tasks

Only My Tasks
☰

Active
Completed

Overdue Tasks

|

Upcoming Tasks

|

Future Tasks

|

New Task

Done	Due Date ↑	Title	Property	Assigned To	Action
<input type="radio"/>	09-06-2022	Demo Task	<a href="#">Demo Property</a>	Adrian Clark Rodriguez	<span style="font-size: 0.8em;">✎</span> <span style="font-size: 0.8em;">🗑</span>
<input type="radio"/>	10-07-2022	Demo Task 2	<a href="#">Demo Property 2</a>	Adrian Clark Rodriguez	<span style="font-size: 0.8em;">✎</span> <span style="font-size: 0.8em;">🗑</span>
<input type="radio"/>	28-07-2022	Demo Task 3	<a href="#">Demo Property 3</a>	Adrian Clark Rodriguez	<span style="font-size: 0.8em;">✎</span> <span style="font-size: 0.8em;">🗑</span>

# 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.

Name ⓘ

Status ⓘ

Due Date ⓘ

Description ⓘ

Source ⓘ

Priority ⓘ

Reminders ⓘ

Associated With Task ⓘ

Associated With Property ⓘ

Associated With User ⓘ

Associated With Contact ⓘ

Notes ⓘ

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

Done	Due Date ↑	Title	Property	Assigned To	Action
<input type="checkbox"/>	08-06-2022	Demo Maintenance	Demo Property	Adrian Clark Rodriguez	
<input type="checkbox"/>	29-07-2022	Demo Maintenance 2	Demo Property 2	Adrian Clark Rodriguez	
<input type="checkbox"/>	11-07-2022	Demo Maintenance 3	Demo Property 3	Adrian Clark Rodriguez	

# GRAY SIDEBAR

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

## PROPERTY STORE



Pipeline

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



Dashboard

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

Deal Sourcing



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

Property Management



Gives access to property handling features.

Lettings



Tenancy tracking is located here.

Admin



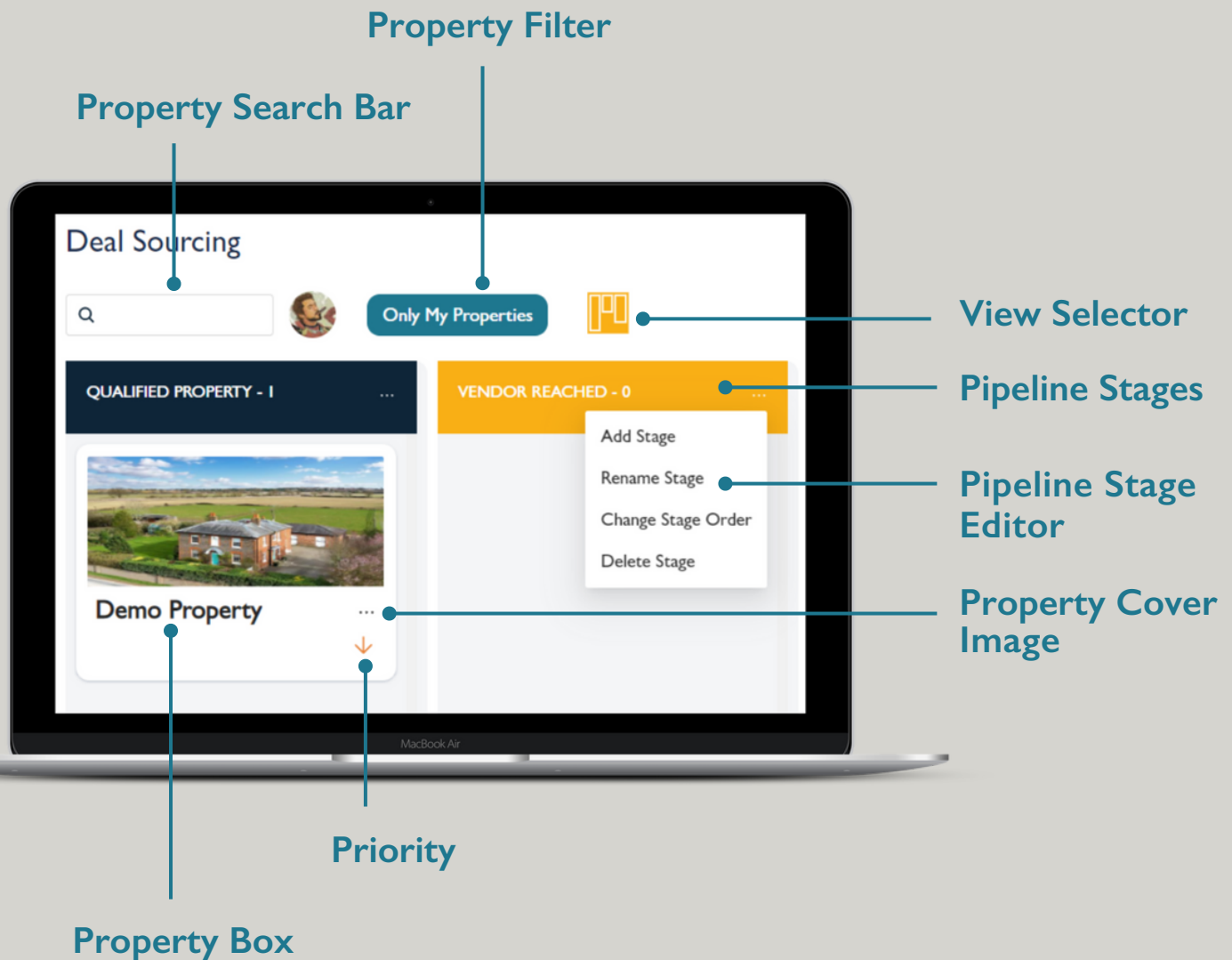
Clerical functions are assembled here.

Social



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

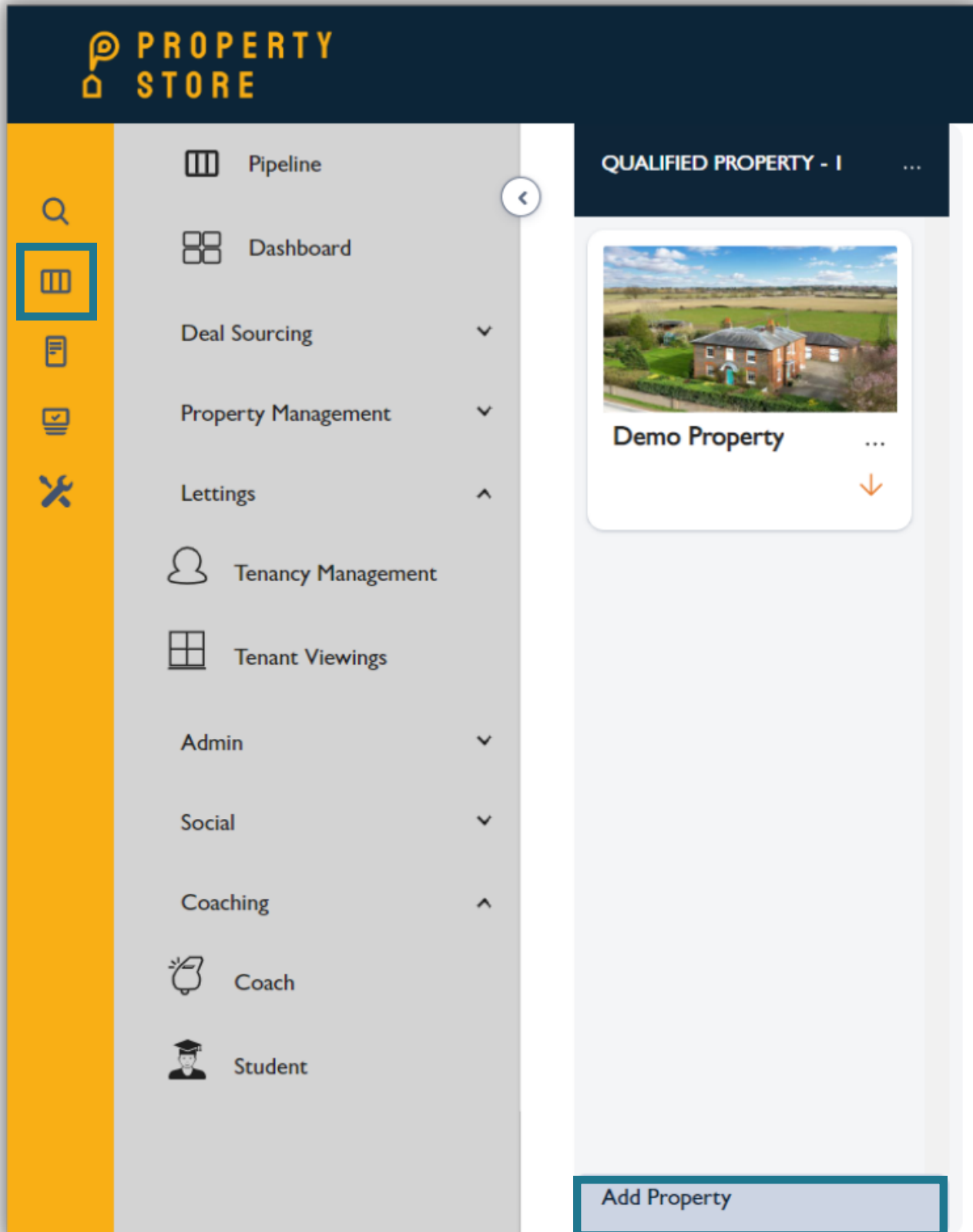
Shows the priority level that you set for the property. Default priority is Medium.



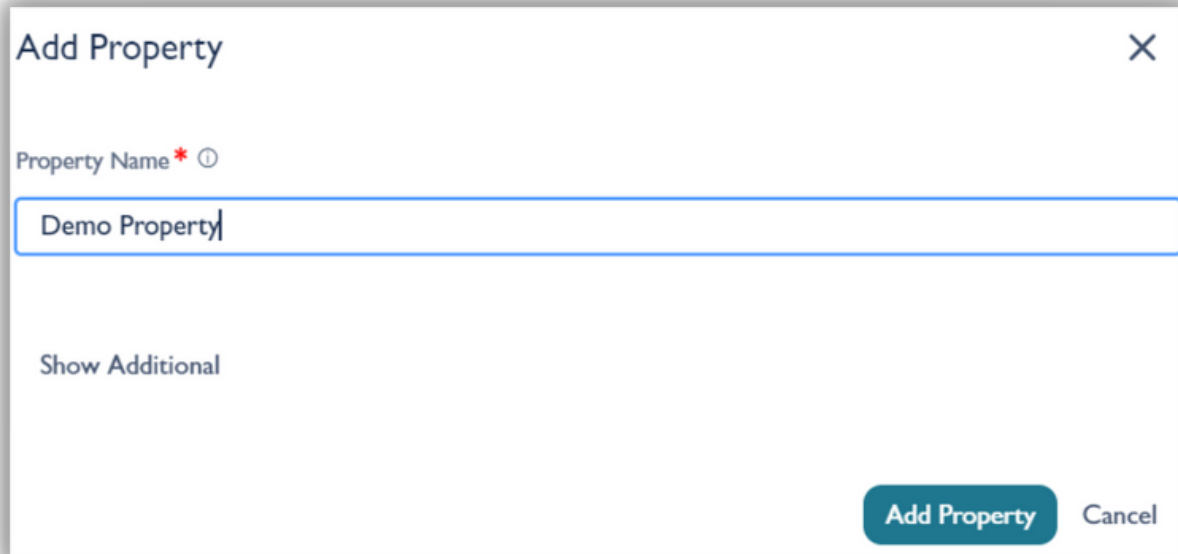


# ADD PROPERTY

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



## 2. Fill in the details of your Property.



Add Property

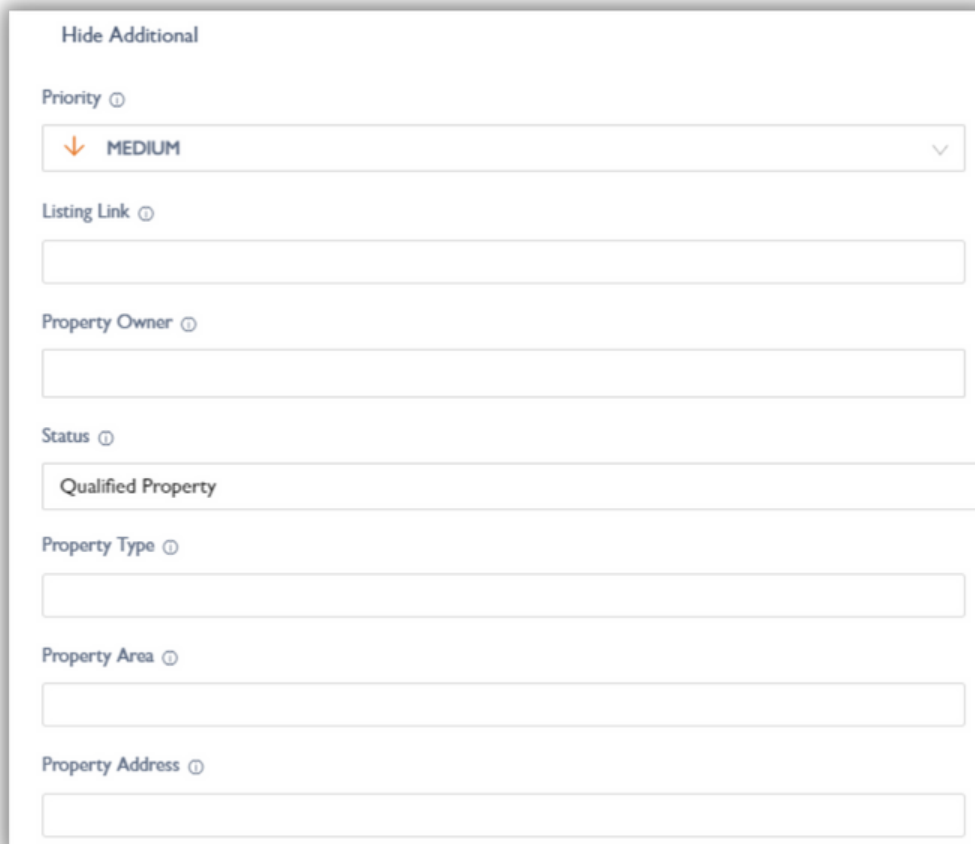
Property Name \* ⓘ

Demo Property

Show Additional

Add Property Cancel

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



Hide Additional

Priority ⓘ

↓ MEDIUM

Listing Link ⓘ

Property Owner ⓘ

Status ⓘ

Qualified Property

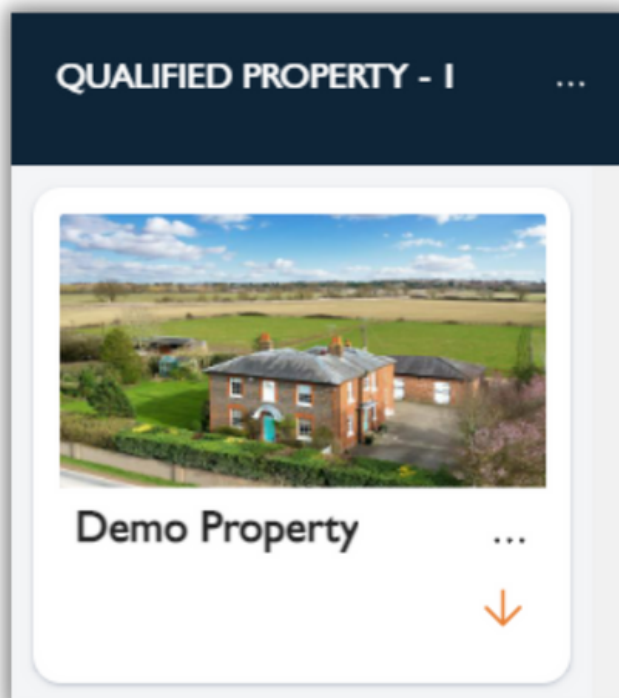
Property Type ⓘ

Property Area ⓘ

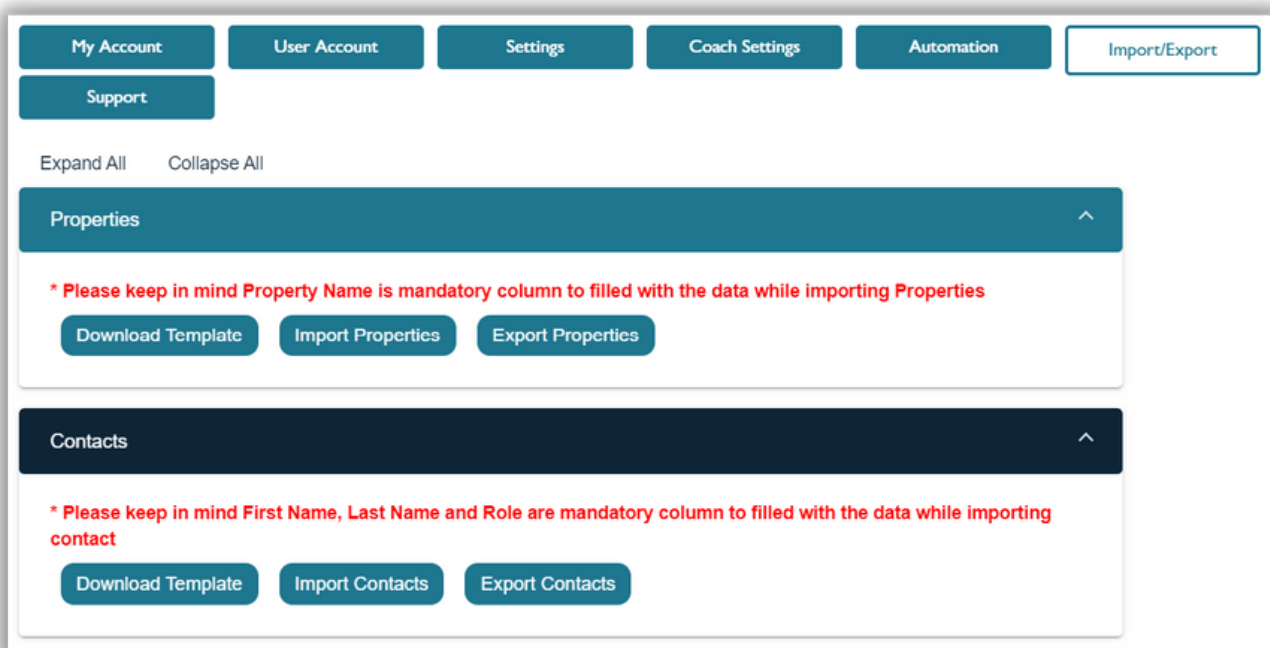
Property Address ⓘ

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.

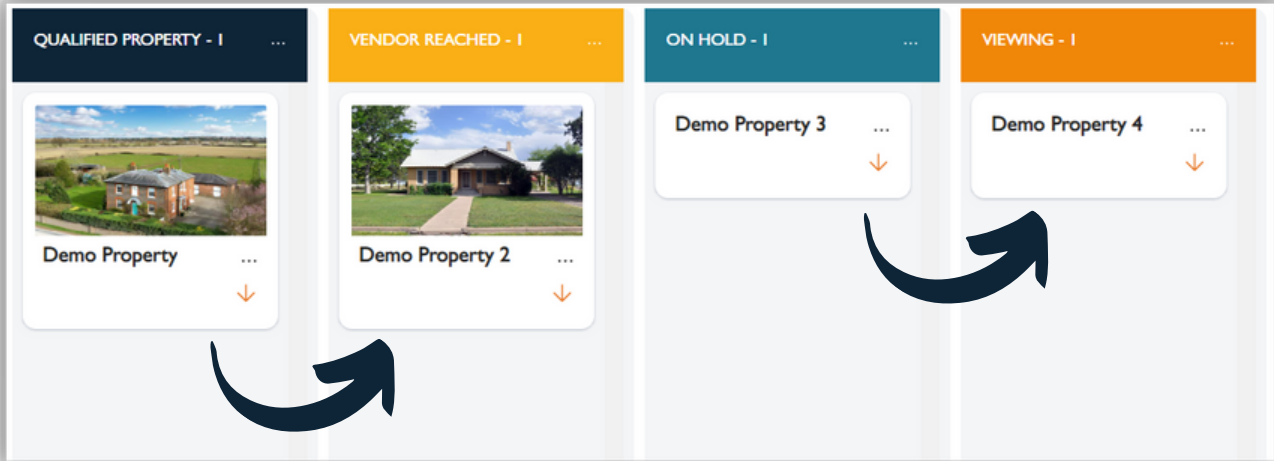


You can also import a large number of properties by downloading the template. The template is a pre-formatted spreadsheet which you can fill in with the details of your portfolio and then upload to Property Store. The template can be found on the IMPORT/EXPORT of PIPELINE ADMIN.



# STAGES

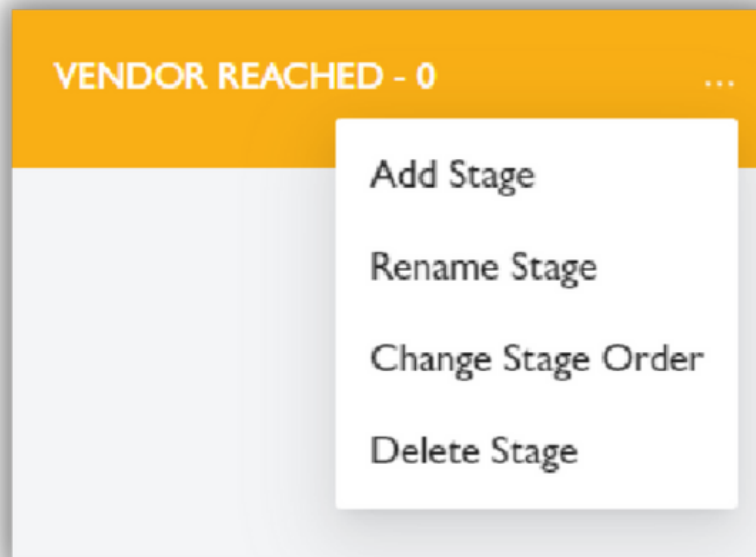
## 1. Drag and drop properties between stages.



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


Name ↑	Address	Assignee	Cashflow	Status	Priority	Action
Demo Property	M24 SRP			Qualified Property	↓ Medium	 
Demo Property 2	PR0 2AF			Vendor Reached	↓ Medium	 
Demo Property 3				On Hold	↓ Medium	 
Demo Property 4				Viewing	↓ Medium	 

## KANBAN VIEW


QUALIFIED PROPERTY - 1 ...




Demo Property ...



VENDOR REACHED - 1 ...




Demo Property 2 ...




ON HOLD - 1 ...

Demo Property 3 ...



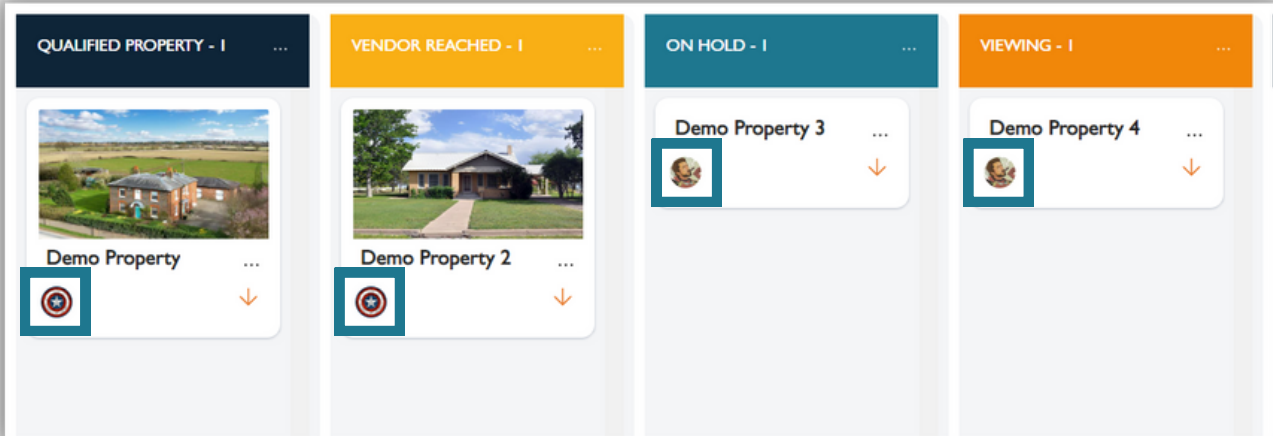
VIEWING - 1 ...

Demo Property 4 ...

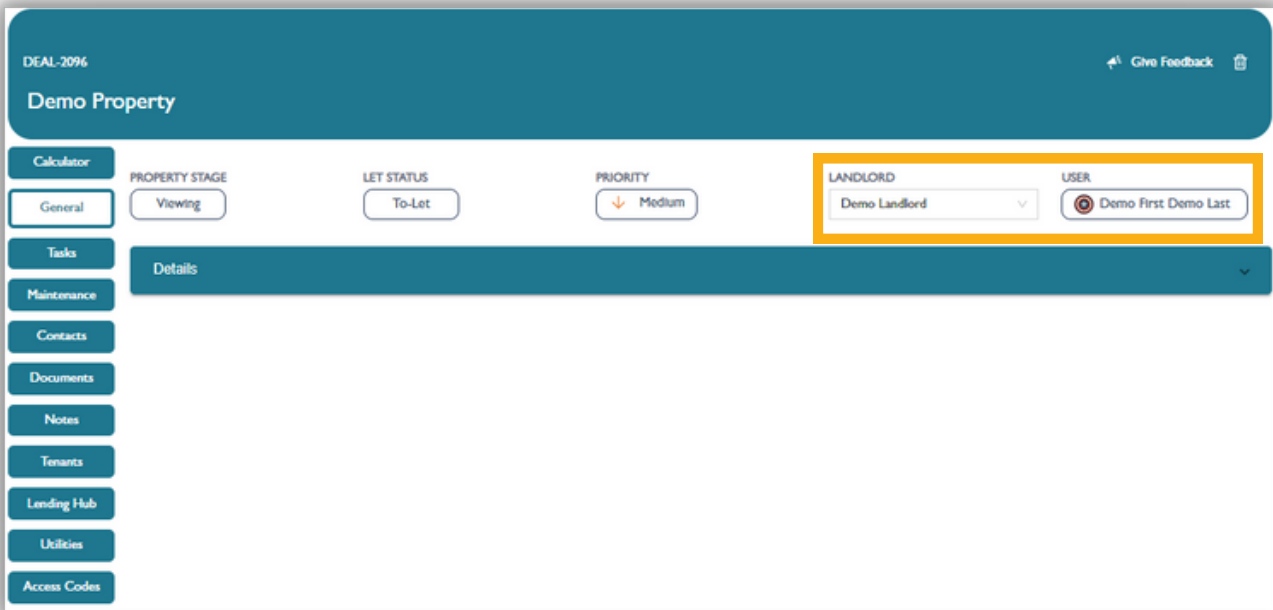


# OWNED PROPERTY

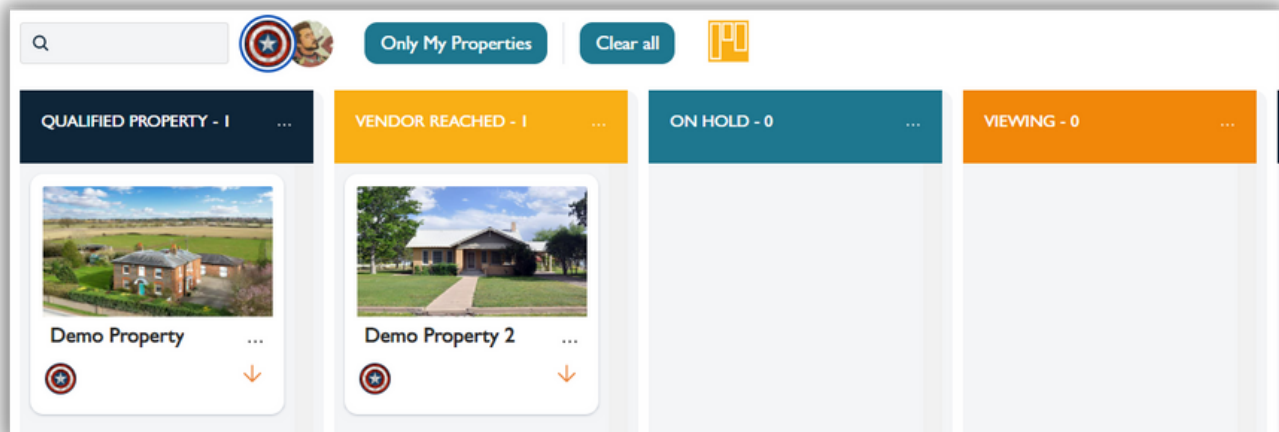
## I. Assign Property to User and Landlord for tracking.



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.

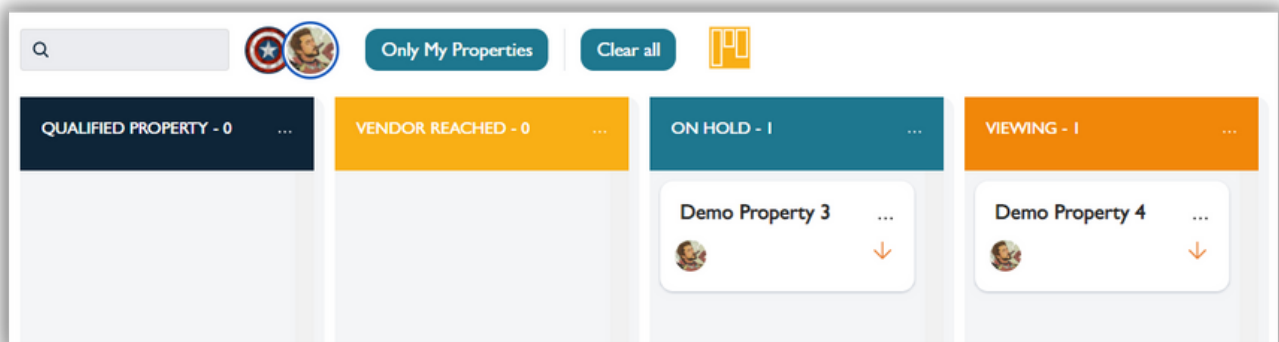


## 2. Sort properties by owner.



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:

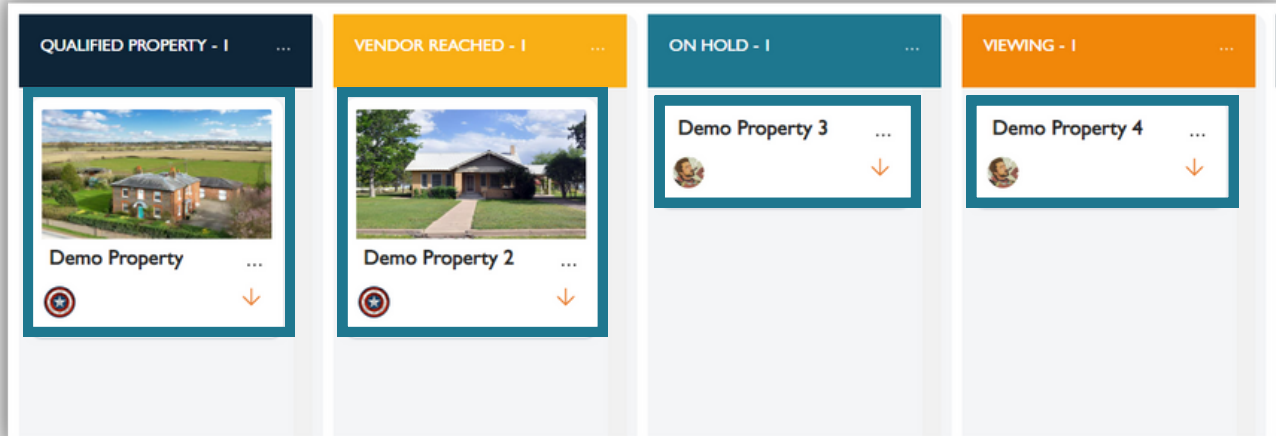


You can use the "Clear all" button to remove the filter. This is important because properties with NO USER will be sorted out.

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

I. 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.

DEAL:2899 Give Feedback

80 Mealhouse Lane, Atherton

Calculator

PROPERTY STAGE: General Accepted LET STATUS: None PRIORITY: Medium LANDLORD: Select Landlord USER: Demo First Demo Last

Tasks

Maintenance

Contracts

Documents

Notes

Tenants

Lending Hub

Utilities

Access Codes

Details

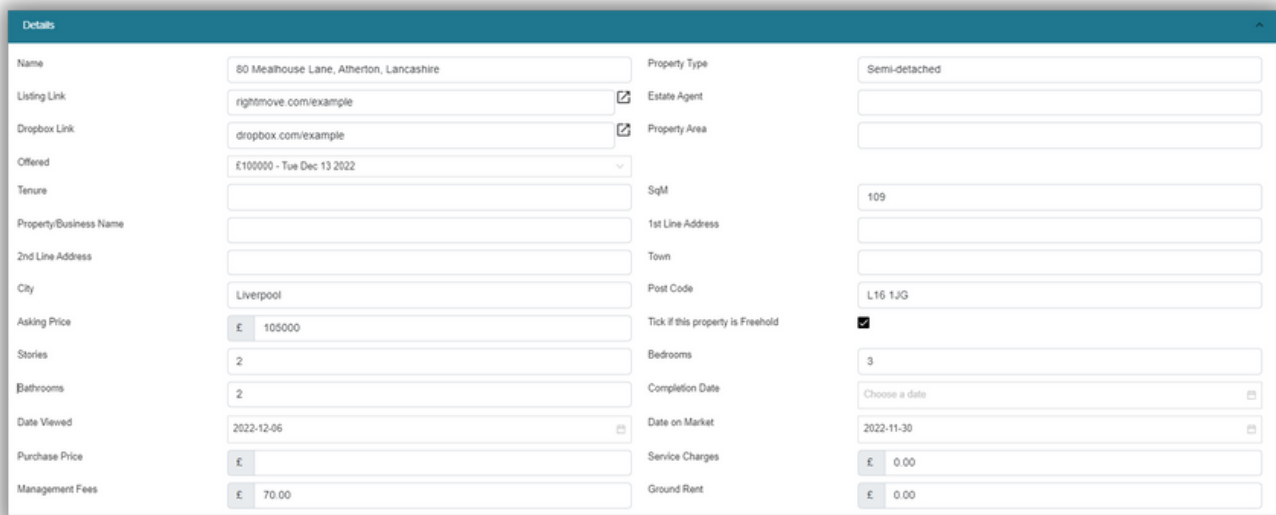
Name	80 Mealhouse Lane, Atherton, Lancashire	Property Type	Semi-detached
Listing Link	rightmove.com/example	Estate Agent	
Dropbox Link	dropbox.com/example	Property Area	
Offered	£100000 - Tue Dec 13 2022	SqM	109
Tenure		1st Line Address	
Property/Business Name		Town	
2nd Line Address		Post Code	L16 1JG
City	Liverpool	Tick if this property is Freehold	<input checked="" type="checkbox"/>
Asking Price	£ 105000	Bedrooms	3
Stories	2	Completion Date	Choose a date
Bathrooms	2	Date on Market	2022-11-30
Date Viewed	2022-12-06	Service Charges	£ 0.00
Purchase Price	£	Ground Rent	£ 0.00
Management Fees	£ 70.00		

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.

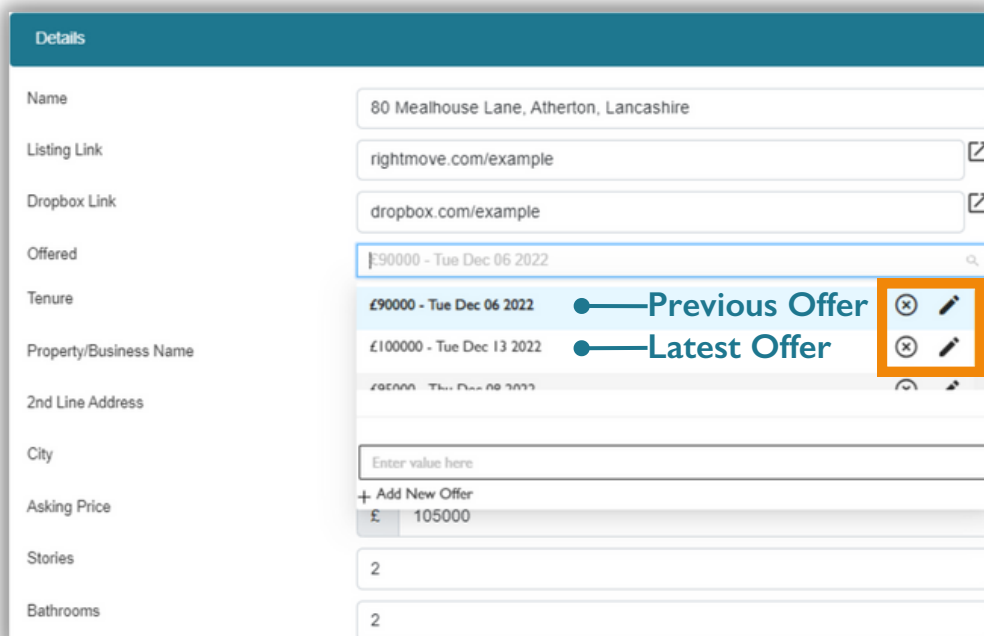
For now, let's focus on the General Tab:



The screenshot shows a 'Details' form with the following fields and values:

Name	80 Mealhouse Lane, Atherton, Lancashire	Property Type	Semi-detached
Listing Link	rightmove.com/example	Estate Agent	
Dropbox Link	dropbox.com/example	Property Area	
Offered	£100000 - Tue Dec 13 2022	SqM	109
Tenure		1st Line Address	
Property/Business Name		Town	
2nd Line Address		Post Code	L16 1JG
City	Liverpool	Tick if this property is Freehold	<input checked="" type="checkbox"/>
Asking Price	£ 105000	Bedrooms	3
Stories	2	Completion Date	Choose a date
Bathrooms	2	Date on Market	2022-11-30
Date Viewed	2022-12-06	Service Charges	£ 0.00
Purchase Price	£	Ground Rent	£ 0.00
Management Fees	£ 70.00		

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 screenshot shows the 'Details' form with a list of offers. The 'Offered' field is expanded to show a list of offers:

- £90000 - Tue Dec 06 2022 (Previous Offer)
- £100000 - Tue Dec 13 2022 (Latest Offer)
- £85000 - Tue Dec 06 2022

The 'Previous Offer' and 'Latest Offer' rows have a pencil icon (edit) and a delete icon (X) highlighted with an orange box. Below the list is an 'Add New Offer' button and an 'Asking Price' field set to £ 105000.

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

**1** Finance Overview

Net Cashflow (£) 0.00

Portfolio LTV (£)

Portfolio Equity (£)

**2** Calendar Overview

Calendar - Tuesday 07th June

10 AM

11 AM

12 PM

1 PM

**3** Maintenance Overview

Tickets

Overdue Maintenance 0

Upcoming Maintenance 1

**4** Task Overview

Tasks

Overdue Tasks 0

Upcoming Tasks 1

New Task

Done	Due Date ↑	Title	Property	Assigned To	Action
<input type="checkbox"/>	09-06-2022	Demo Task	Demo Property	Adrian Clark Rodriguez	

## 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.

Property Viewing Manager

Departure Address: SK12 IUT

Method of Travel:

Area Map

Scheduled Viewings

Viewing Schedule	Deal	Address	Time Of Arrival	Date Of Arrival	Depart Previous Destination	Distance to travel	Edit
Destination 1	Demo Property	M24 SRP	11 : 00	2022-06-25	10:18 am	34.8 km	
Destination 2	Demo Property 2	PR0 2AF	09 : 00	2022-06-25	8:21 am	54.1 km	

Schedule Viewings Export Viewings

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

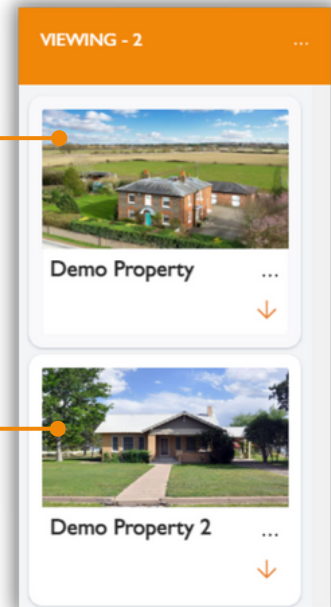
Deal Sourcing

- Property Viewing
- Investment Calculator**
- Property Management

# VIEWING PROPERTIES

## 1. Add properties to the Viewing Stage of your PIPELINE

Viewing Schedule	Deal	Address
Destination 1	Demo Property	M24 5RP
Destination 2	Demo Property 2	PR0 2AF



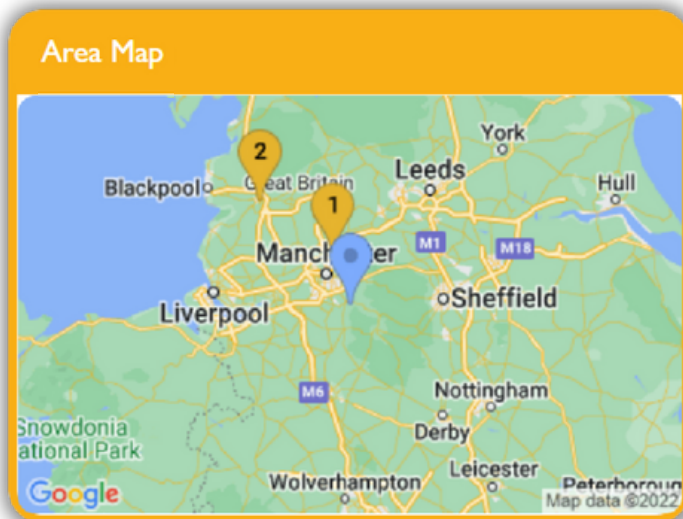
Properties in your VIEWING stage are added automatically along with their postcode. Ensure that the Property has a valid postcode on the Address Column as shown or feature will not work.



## 2. Set your Departure Address and Method of Travel.

PIPELINE Default or type in a postcode.  
Set to calculate time required to travel.



Departure Address	SK12 IUT
Method of Travel	

Initial location and Destination will appear on the Area Map.



-  Initial Location Marker
-  Destination Marker/s

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

Time Of Arrival	Date Of Arrival	Depart Previous Destination	Distance to travel	Edit
11 : 00	2022-06-25	10:18 am	34.8 km	
09 : 00	2022-06-25	8:21 am	54.1 km	

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.

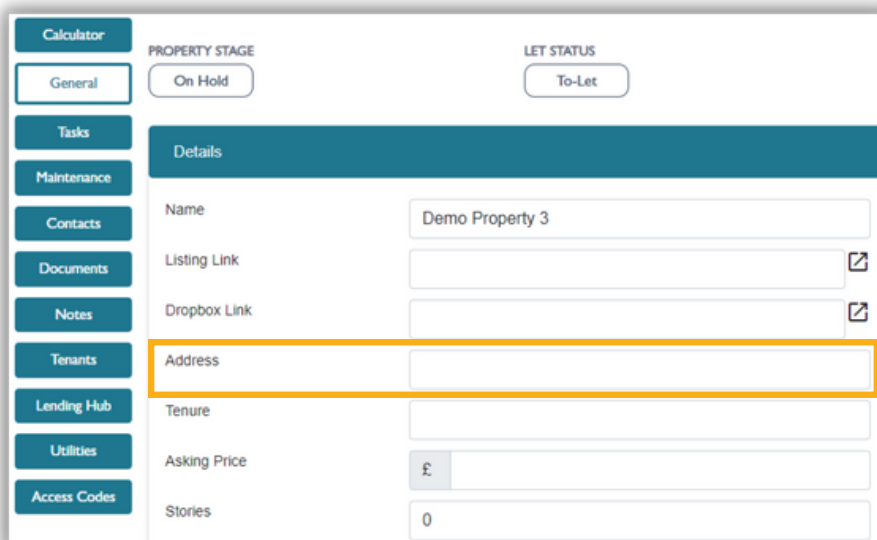
**Schedule Viewings**

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

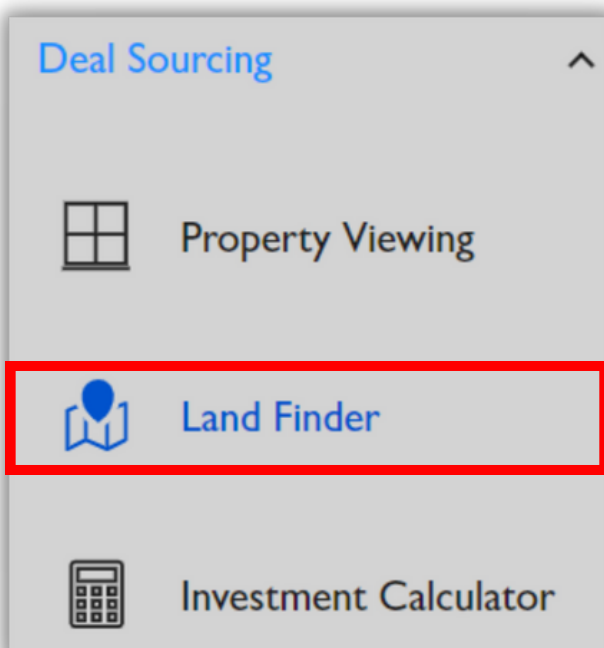
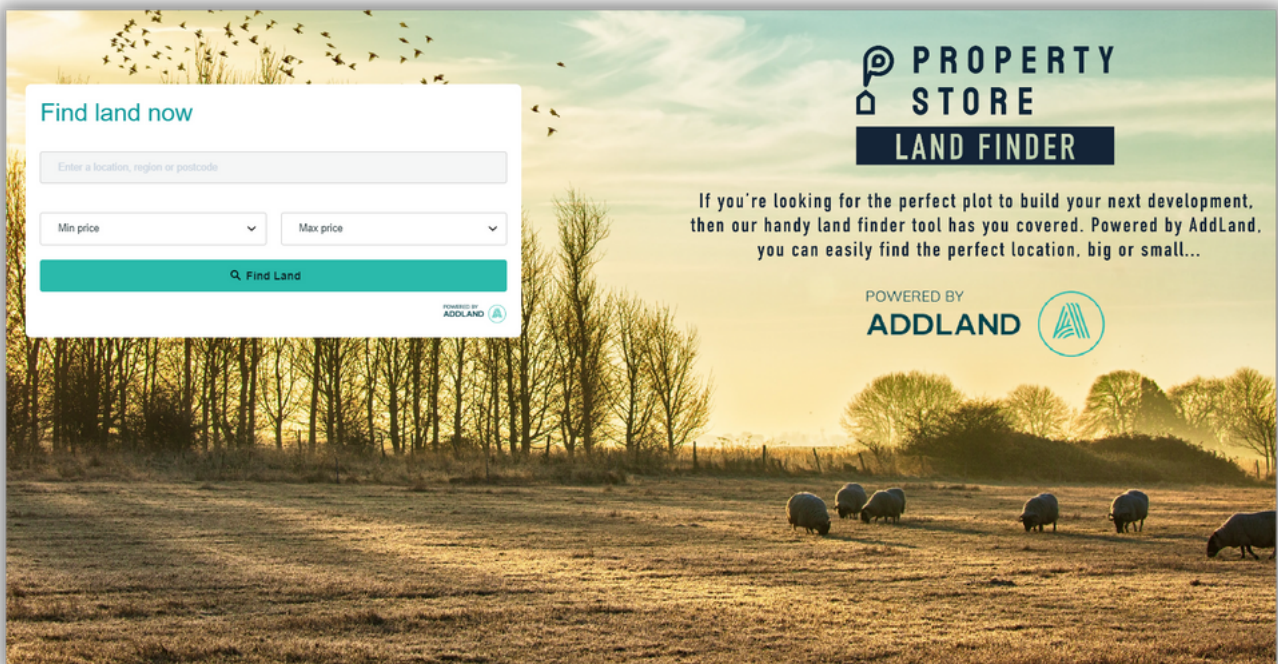


The screenshot shows a sidebar with navigation options: Calculator, General, Tasks, Maintenance, Contacts, Documents, Notes, Tenants, Lending Hub, Utilities, and Access Codes. The main content area is titled 'PROPERTY STAGE' and 'LET STATUS'. Under 'PROPERTY STAGE', there are buttons for 'On Hold' and 'To-Let'. The 'Details' section includes fields for Name (Demo Property 3), Listing Link, Dropbox Link, Address (highlighted), Tenure, Asking Price (with a currency symbol £), and Stories (0).

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

## I. Enter a Location, Region, or Postcode.

Find land now

SK1 1AB

Min price ▼ Max price ▼

Find Land

POWERED BY ADDLAND

(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.

ADDLAND

Find Research Sell Memberships Login Join

SK1 1AB + 0 miles Price range Land types Size Add more filters Reset Filters Save search Map

Land in Greater London  
356 result(s)

All land (356) Rural Land (70) Development Land (279)  
Agricultural Land (2) Residential Land (5)

Email alerts

Sort by Availability

Development Land  
Lot 17-166 Northwood...  
Hillingdon  
£750,000

Rural Land  
Land at Langton Grove...  
Hillingdon  
£375,000

Development Land  
Land at Reeves Corner...  
Croydon  
£1,750,000

Development Land  
Consented Development...  
Croydon  
£405,000

Development Land  
Conversion Opportunity...  
Lambeth  
£3,000,000

Development Land  
Development Opportuni...  
Levisham  
£2,600,000

No Result [View our Catalogue](#)

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

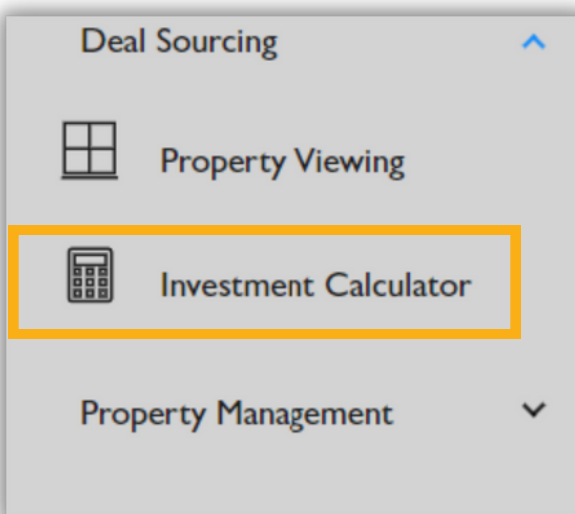
# INVESTMENT CALCULATOR

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.

The screenshot shows the 'Investment Calculator' interface with the following data:

MIMO Offer	ROI	Cashflow PCM	Yield	ROI Flip Sell	Profit
£73100	17%	£375	8%	1.75%	£2100

Below the table are controls for 'Expand All', 'Collapse All', and 'Clear All'. There are also checkboxes for 'Flip', 'BTL', 'Flat/New Build', and 'HMO', and a 'Max Offer' input field set to £100000. A list of properties is shown with expandable sections for 'Properties', 'Money In - Buying', '1st Exit - BTL - Refinance & Rent', and '2nd Exit - Flip - Sell'. At the bottom are 'Add Property' and 'Cancel' buttons.



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



# CRUNCHING NUMBERS

## I. Choose your Exit Strategy

Flip
  BTL
  Flat/New Build
  HMO

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:

MIMO Offer	ROI	Cashflow PCM
£73100	17%	£375

Yield	ROI Flip Sell	Profit
8%	1.75%	£2100

1st Exit - BTL - Refinance & Rent

2nd Exit - Flip - Sell

## 2. Set a ballpark Max Offer.

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.

The screenshot shows a form titled 'Properties' with the following fields:

- Date: 01 Jul 2022
- Date on Market: dd --- yyyy
- Name: [empty]
- Address: [empty]
- Type: [empty]
- Area: [empty]
- Asking Price: £ 0
- Link: [empty]
- Estate Agent: [empty]
- Tenure: [empty]
- Sqm: 0
- Notes: [empty]

### 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:

The screenshot shows a form titled 'Money In - Buying' with the following fields:

- Method of Purchase: Mortgage (highlighted with a yellow box)
- 25% Deposit: £ 25000
- 75% LTV: £ 75000
- Cost of Works: £ 0
- Investor Fees: £ 0
- Sourcing Fees: £ 0
- Holding Fees: £ 0
- Legal Fees: £ 1000
- Fees: £ 1500
- Project Management: £ 1000
- Survey: £ 400
- Stamp Duty: £ 3000
- Total Cost: £ 6900
- Money Needed: £ 31900

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

25% Deposit	£	25000	
75% LTV	£	75000	
Fees	£	1500	
Project Management	£	1000	
Survey	£	400	
Stamp Duty	£	3000	<input type="checkbox"/>
Total Cost	£	6900	
Money Needed	£	31900	

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

Money In - Buying

Method of Purchase

Investor Fees	£	0	Fees	£	1500	
Sourcing Fees	£	0	Project Management	£	1000	
Holding Fees	£	0	Survey	£	400	
Legal Fees	£	1000	Stamp Duty	£	0	<input type="checkbox"/>
			Total Cost	£	3900	
Gross Loan %	%	0	Gross Loan £	£	0	
Arrangement Fee	%	0	Arrangement Fee £	£	0	
Exit Fee	%	0	Exit Fee £	£	0	
Monthly Rate %	%	0	Interest to Deduct £	£	0	
Term (months)		0	Net Loan	£	0	
			Deposit Required	£	0	
			Money Needed	£	3900	

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

Field	Value
Method of Purchase	Cash
Cost of Works	£ 0
Investor Fees	£ 0
Sourcing Fees	£ 0
Holding Fees	£ 0
Legal Fees	£ 1000
Fees	£ 1500
Project Management	£ 1000
Survey	£ 400
Stamp Duty	£ 0
Total Cost	£ 3900
Money Needed	£ 3900

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)

Field	Value
Method of Refinance	Mortgage
GDV	£ 65000
Rent PCM	£ 550
Ground Rent PCM	£ 0
Service Charge PCM	£ 0
Licence/Insurance PCM	£ 0
Utilities/Council Tax PCM	£ 0
Refinance LTV %	% 75
£/sqm	£ 0
Refinance Amount	£ 48750
Money Left In	£ -44850
Rent PCY	£ 6600
Mortgage PCM	£ 121.88
Mgmt Fees PCM	£ 55
MOE	£ 55
Total Outgoing PCM	£ 231.88
Cashflow	£ 318.12

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)

1st Exit - BTL - Refinance & Rent

Method of Refinance  Cash

GDV <input type="radio"/>	£ 65000	Rent PCY <input type="radio"/>	£ 6600
Rent PCM <input type="radio"/>	£ 550	Mgmt Fees PCM <input type="radio"/>	£ 55
Ground Rent PCM <input type="radio"/>	£ 0	MOE <input type="radio"/>	£ 55
Service Charge PCM <input type="radio"/>	£ 0	Total Outgoing PCM <input type="radio"/>	£ 231.88
Licence/Insurance PCM <input type="radio"/>	£ 0	Cashflow <input type="radio"/>	£ 318.12
Utilities/Council Tax PCM <input type="radio"/>	£ 0		
Refinance LTV % <input type="radio"/>	% 75		
£/sqm <input type="radio"/>	£ 0		
Refinance Amount <input type="radio"/>	£ 48750		
Money Left In <input type="radio"/>	£ -44850		

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

## FLIP Exit Form

2nd Exit - Flip - Sell

GDV <input type="radio"/>	£ 65000
Legals <input type="radio"/>	£ 1000
Agent Fee <input type="radio"/>	% 0
Agent Fee £ <input type="radio"/>	£ 0
Total Costs <input type="radio"/>	£ 1000

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.

MIMO Offer	ROI	Cashflow PCM
£73100	17%	£375

Yield	ROI Flip Sell	Profit
8%	1.75%	£2100

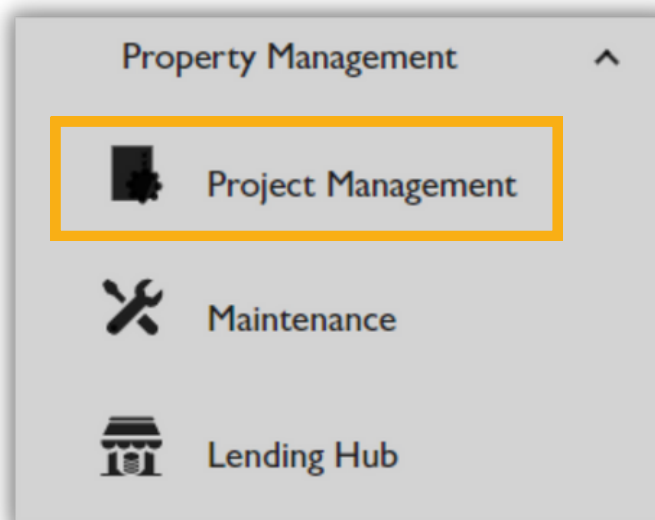
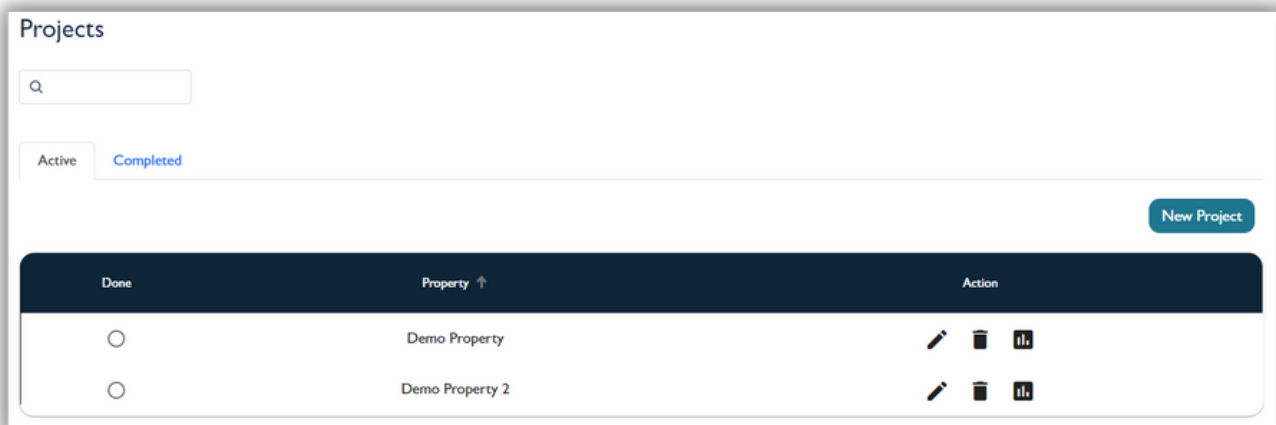
## 7. Click the "Add Property" Button to save property.

**Add 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

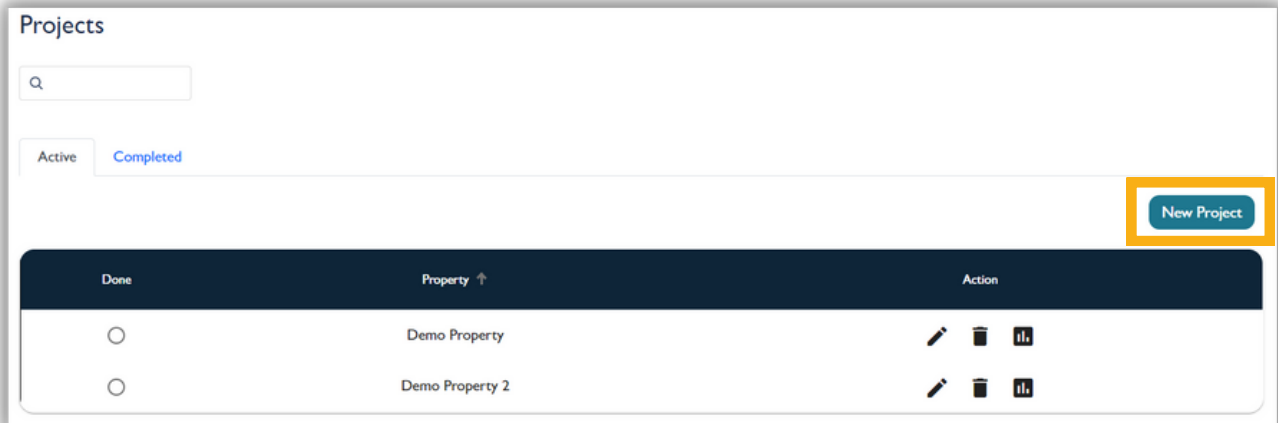
As you may have already guessed, the Project Management tool is for significant works such as refurbishments where there would be multiple activities to be tracked with multiple contacts. As a contractor, you can also use this to track your projects for different clients.



**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.

The form is titled 'Property Information' and has three tabs: 'Property Information', 'Renovation Works', and 'Create Tender'. It contains the following fields:

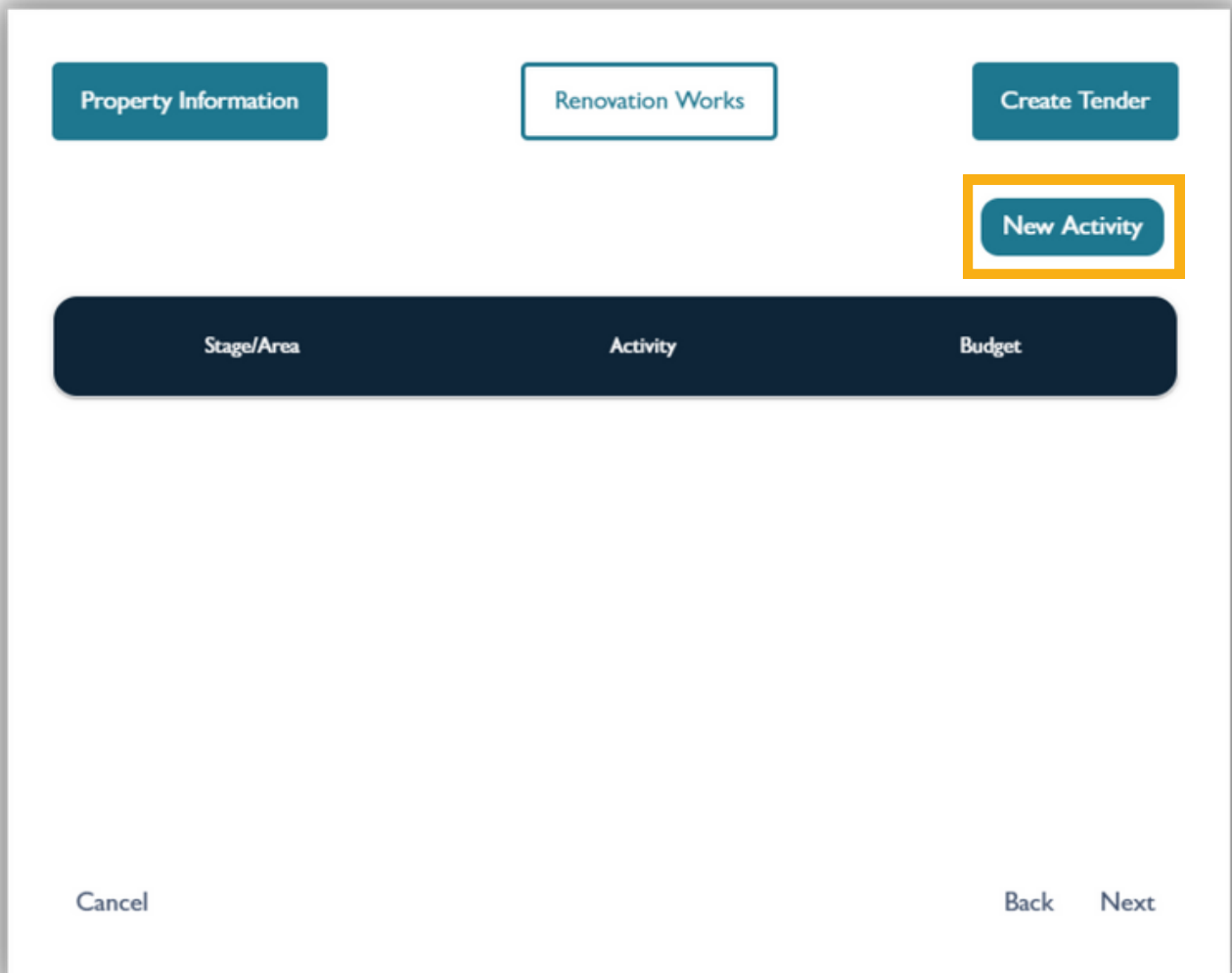
- Property Name (dropdown menu)
- Client Contact(s) (text input)
- Tender Return Date (date picker)

At the bottom, there are buttons for 'Cancel', 'Save & Create Project', and 'Next'.

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.

The screenshot shows a 'Create Activity' form with the following fields and controls:

- Stage/Area**: A dropdown menu with 'Select Title' as the current selection.
- Activity**: A text input field.
- Owner**: A text input field.
- Spec**: A text input field.
- Advised Payment**: A text input field with a '£' symbol on the left.
- Date From**: A date picker dropdown menu with 'Choose a date' and a downward arrow.
- Date To**: A date picker dropdown menu with 'Choose a date' and a downward arrow.
- Budget**: A text input field with a '£' symbol on the left.
- Paid**: A text input field with a '£' symbol on the left.
- Remaining**: A text input field with a '£' symbol on the left.
- Notes**: A large text area for entering notes.
- Buttons**: 'Create Activity' (in a blue rounded rectangle) and 'Cancel' (in a grey rounded rectangle) at the bottom right.

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.

The screenshot shows a software interface with three tabs at the top: 'Property Information', 'Renovation Works', and 'Create Tender'. Below the tabs is a 'New Activity' button. A table displays the following data:

Stage/Area	Activity	Budget
Kitchen	Repaint Kitchen Walls	1200

At the bottom of the screen, there are three buttons: 'Cancel', 'Back', and 'Next'. The 'Next' button is highlighted with a yellow border.

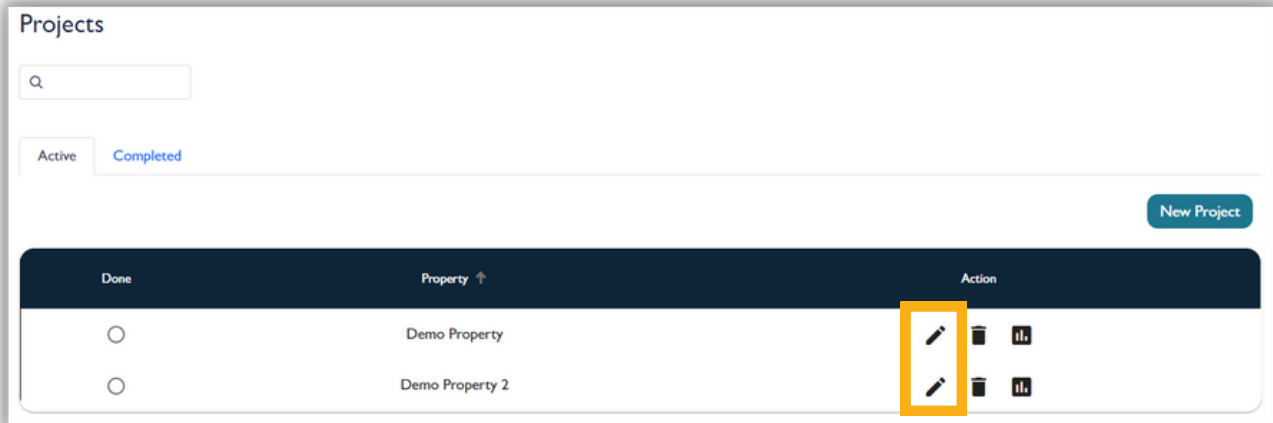
6. Add an Addendum if needed and click "Create Project".

The screenshot shows the same software interface as above, but with the 'Addendum' section expanded. It features a text input field containing the text 'This is an addendum'. At the bottom of the screen, the buttons are 'Cancel', 'Back', and 'Create Project'. The 'Create Project' button is highlighted with a yellow border.

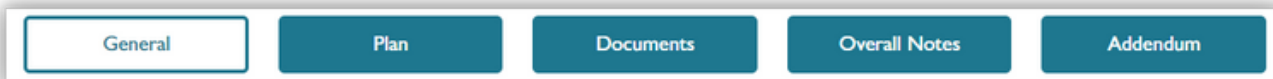
After clicking the button, your project is now finalized and can be edited if needed, which will be discussed next.

# EDITING PROJECTS

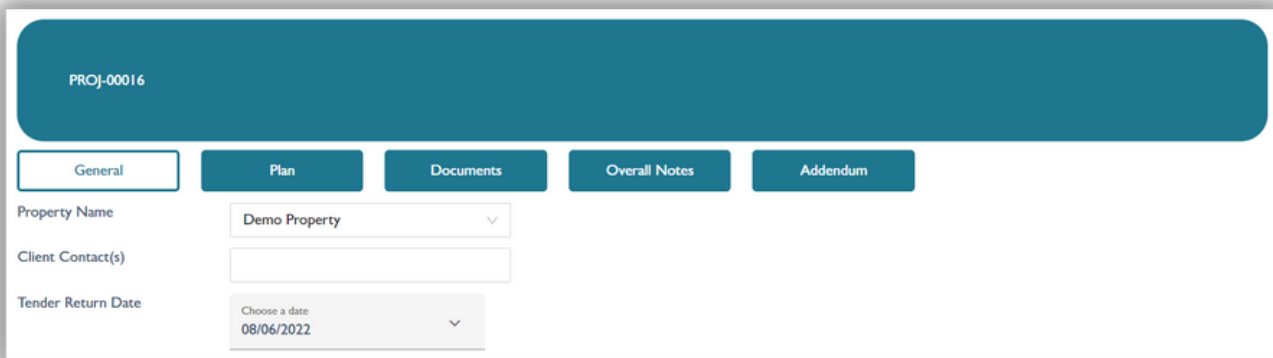
1. Click the Pencil Icon beside chosen Project.



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:

### Download Tender Pack

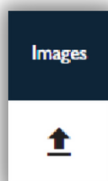
Downloads a pre-formatted invitation to tender document.

### Download Progress Report

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

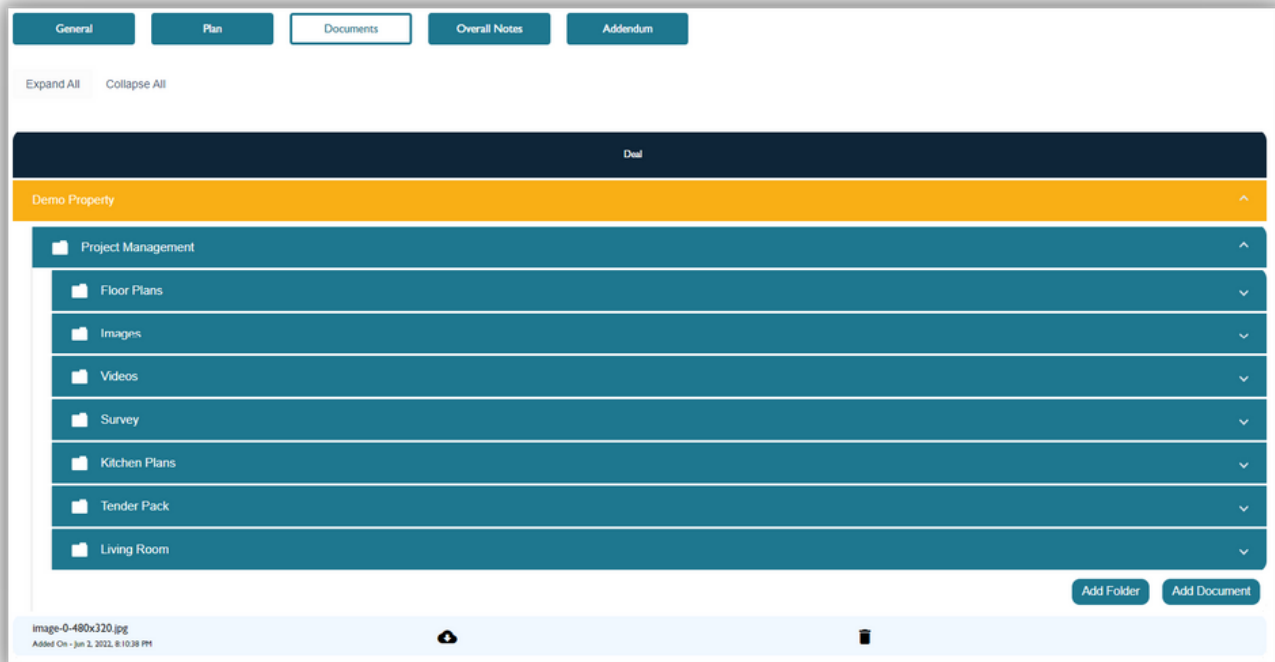
### New Activity

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.



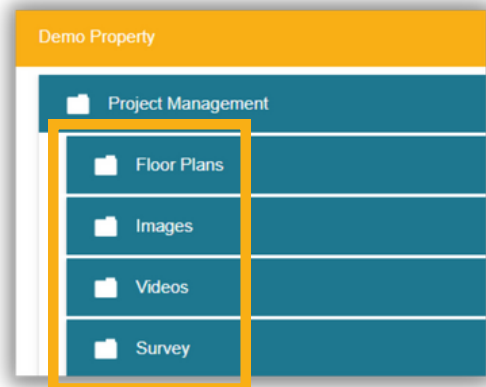
Allows you to upload an image for the specific Stage/Area. Uploaded images can be found on the DOCUMENTS tab

## 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:

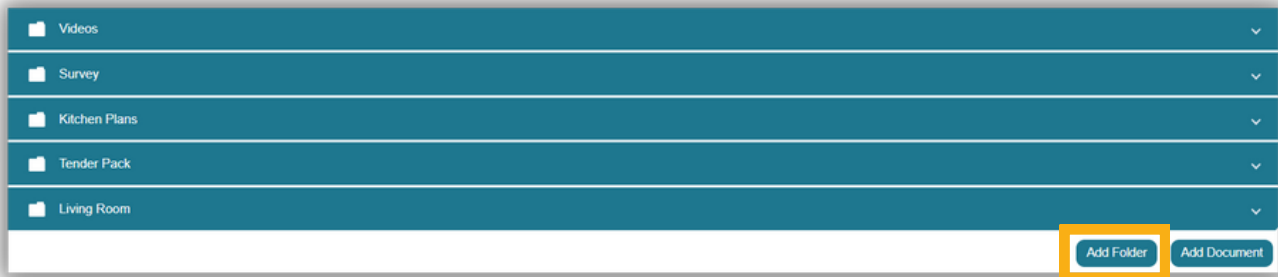
Inside the folder are other subfolders so you can easily organize your documents.



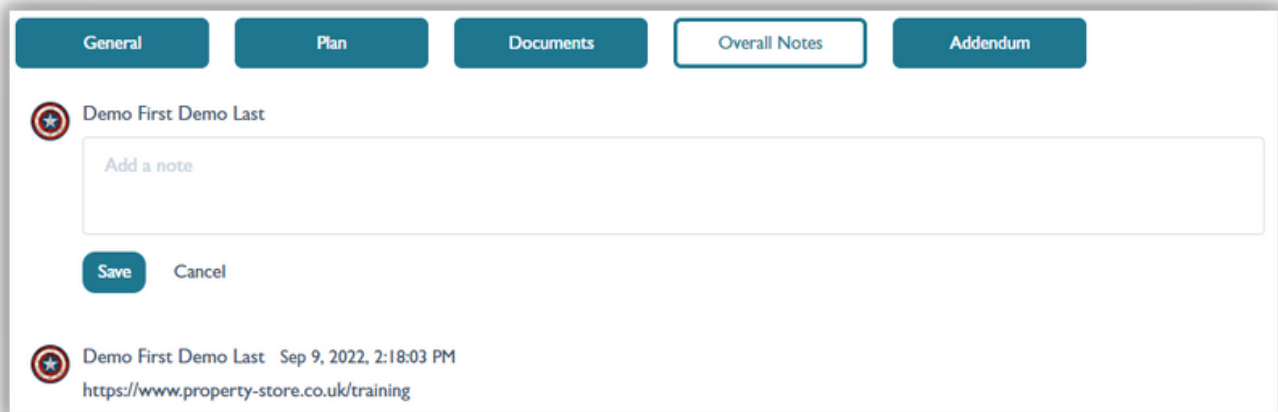
To add a document to any subfolder, click the the subfolder to reveal the "Add Document" button as shown below:



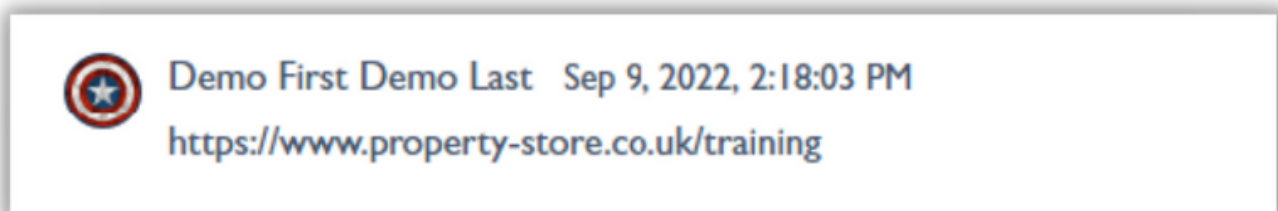
If you want to add your own custom folder, click the "Add Folder" button at the bottom of all the subfolders as shown below:



## 6. Overall Notes Tab

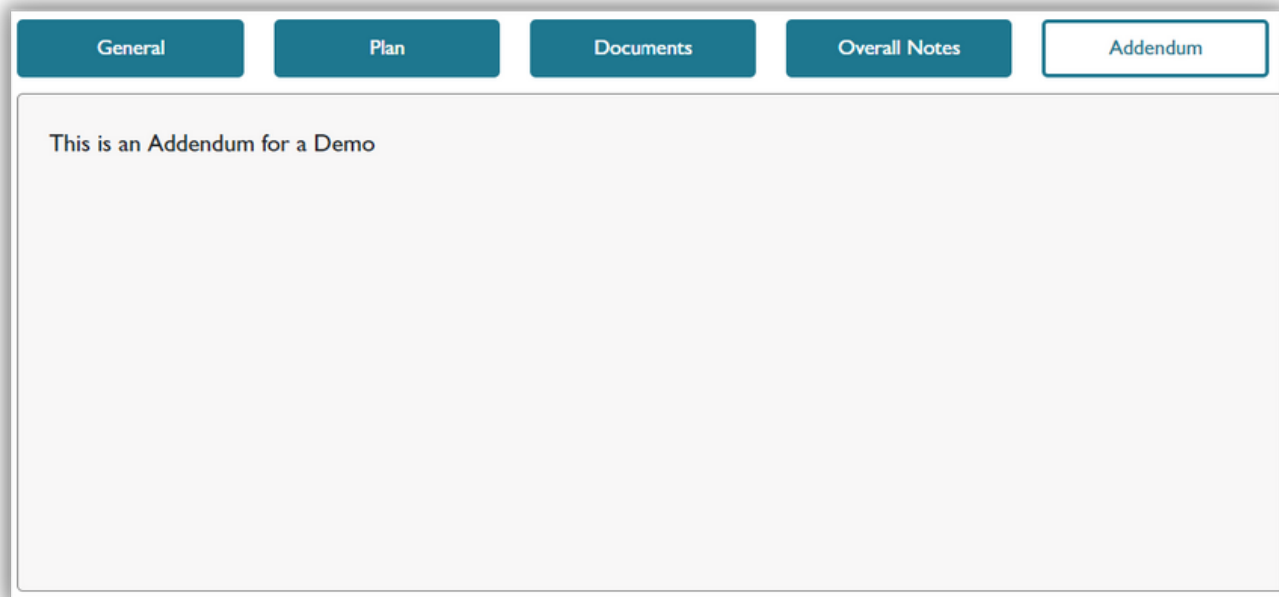


You can add notes for the project in this tab. These notes will show on the pre-formatted progress report that you can download in the PLAN Tab.



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

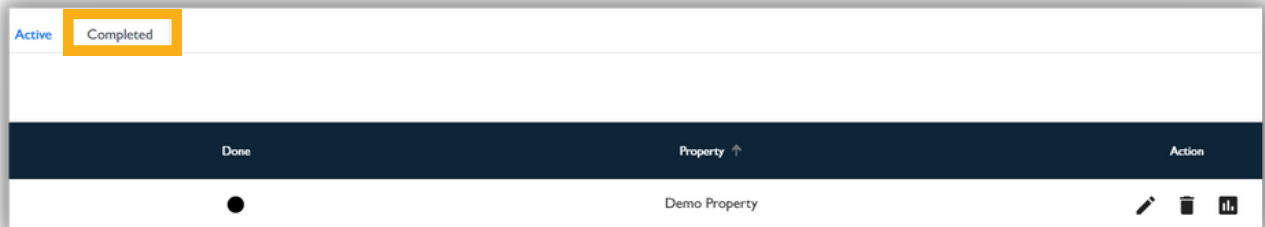
## 1. Projects can be marked as completed and archived.

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



Done	Property	Action
<input type="radio"/>	Demo Property	
<input type="radio"/>	Demo Property 2	
<input type="radio"/>	Demo Property 3	

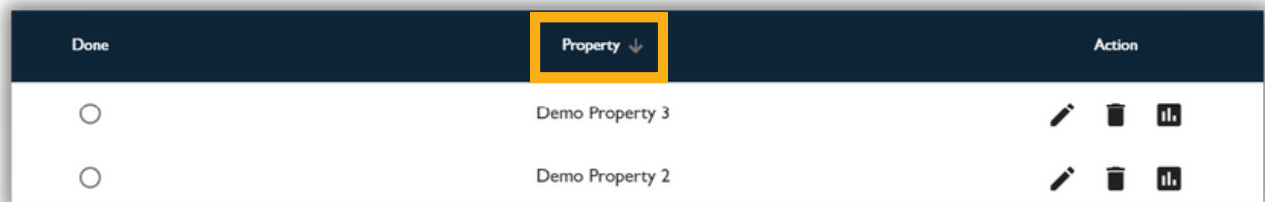
To find the archived projects, simply click the COMPLETED Tab.



Done	Property	Action
<input checked="" type="radio"/>	Demo Property	

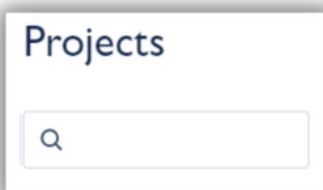
## 2. Projects can be sorted.

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



Done	Property	Action
<input type="radio"/>	Demo Property 3	
<input type="radio"/>	Demo Property 2	

## 3. Projects search function.



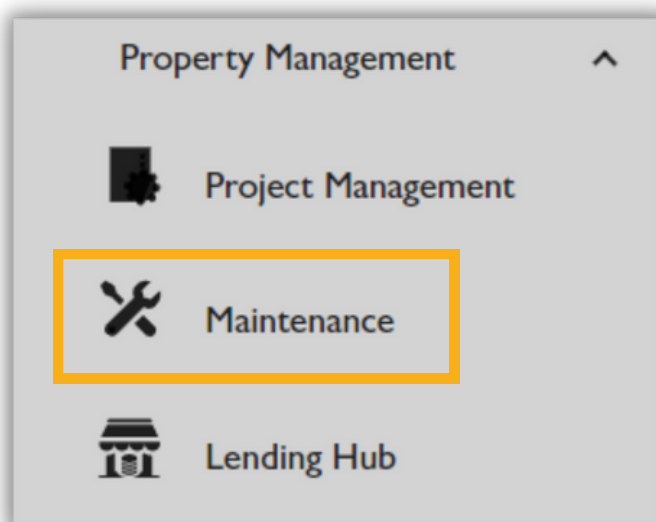
Projects

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.

Done	Due Date ↑	Title	Property	Assigned To	Action
<input type="radio"/>	08-06-2022	Demo Maintenance	Demo Property	Adrian Clark Rodriguez	
<input type="radio"/>	29-07-2022	Demo Maintenance 2	Demo Property 2	Adrian Clark Rodriguez	
<input type="radio"/>	11-07-2022	Demo Maintenance 3	Demo Property 3	Adrian Clark Rodriguez	



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

# CREATE TICKET

I. Click the "New Maintenance" Button.

Done	Due Date ↑	Title	Property	Assigned To	Action
<input type="radio"/>	08-06-2022	Demo Maintenance	Demo Property	Adrian Clark Rodriguez	
<input type="radio"/>	29-07-2022	Demo Maintenance 2	Demo Property 2	Adrian Clark Rodriguez	
<input type="radio"/>	11-07-2022	Demo Maintenance 3	Demo Property 3	Adrian Clark Rodriguez	

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.

The screenshot shows a form for creating a maintenance ticket. The fields are as follows:

- Name: Check Boiler
- Status: OPEN
- Due Date: 10/07/2022
- Description: Tenant on Demo Property says boiler needs repair/replacement
- Source: Tenant
- Priority: HIGH
- Reminders: 1 Day Before Due Date
- Associated With Task: Demo Task
- Associated With Property: Demo Property
- Associated With User: Adrian Clark Rodriguez
- Associated With Contact: Demo Contact
- Notes: (empty)

Buttons at the bottom right: Create Maintenance, Cancel

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

The screenshot shows the MAINTENANCE overview with three filters: Overdue Maintenance (red), Upcoming Maintenance (yellow), and Future Maintenance (grey). A 'New Maintenance' button is in the top right. Below is a table of maintenance tickets:

Done	Due Date ↑	Title	Property	Assigned To	Action
<input type="radio"/>	08-06-2022	Demo Maintenance	Demo Property	Adrian Clark Rodriguez	
<input type="radio"/>	29-07-2022	Demo Maintenance 2	Demo Property 2	Adrian Clark Rodriguez	
<input type="radio"/>	11-07-2022	Demo Maintenance 3	Demo Property 3	Adrian Clark Rodriguez	



# EDITING TICKETS

1. Click the Pencil Icon beside the chosen ticket.

Done	Due Date ↑	Title	Property	Assigned To	Action
<input type="radio"/>	08-06-2022	Demo Maintenance	Demo Property	Adrian Clark Rodriguez	 
<input type="radio"/>	29-07-2022	Demo Maintenance 2	Demo Property 2	Adrian Clark Rodriguez	 
<input type="radio"/>	11-07-2022	Demo Maintenance 3	Demo Property 3	Adrian Clark Rodriguez	 

2. Choose the Tab that you want to edit.

## General Tab

TIKT-00107 Give Feedback  

**General**

Title  Assigned To

Description

Associated Deal



Due Date  Associated Contact

Status  Priority

Source  Reminder


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


TIKT-00107 Give Feedback  

**General**

**Notes**

 Adrian Clark Rodriguez

Pro tip: press **SHIFT + M** to add a note

 Adrian Clark Rodriguez Jun 7, 2022, 12:22:49 AM  
Demo Purposes Only

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.

Done	Due Date ↑	Title	Property	Assigned To	Action
<input type="radio"/>	08-06-2022	Demo Maintenance	Demo Property	Adrian Clark Rodriguez	
<input type="radio"/>	29-07-2022	Demo Maintenance 2	Demo Property 2	Adrian Clark Rodriguez	
<input type="radio"/>	11-07-2022	Demo Maintenance 3	Demo Property 3	Adrian Clark Rodriguez	

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

Active	Completed
	<input checked="" type="radio"/>

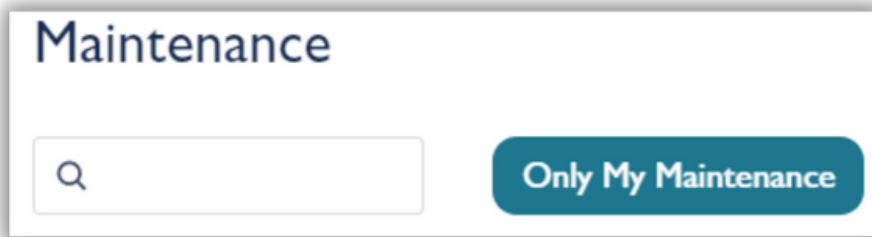
Done	Due Date ↑	Title	Property	Assigned To	Action
<input checked="" type="radio"/>	08-06-2022	Demo Maintenance	Demo Property	Adrian Clark Rodriguez	

## 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.

Done	Due Date ↑	Title	Property	Assigned To	Action
<input type="radio"/>	08-06-2022	Demo Maintenance	Demo Property	Adrian Clark Rodriguez	
<input type="radio"/>	29-07-2022	Demo Maintenance 2	Demo Property 2	Adrian Clark Rodriguez	
<input type="radio"/>	11-07-2022	Demo Maintenance 3	Demo Property 3	Adrian Clark Rodriguez	

### 3. MAINTENANCE tickets search function.



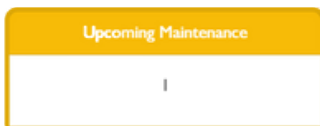
Similar to the Project search function, this search box will only look for MAINTENANCE tickets.

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.



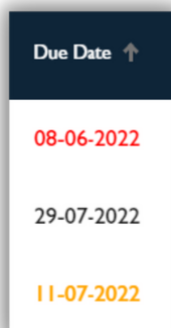
Tickets that are past their due date.



Tickets that are due within 7 days.

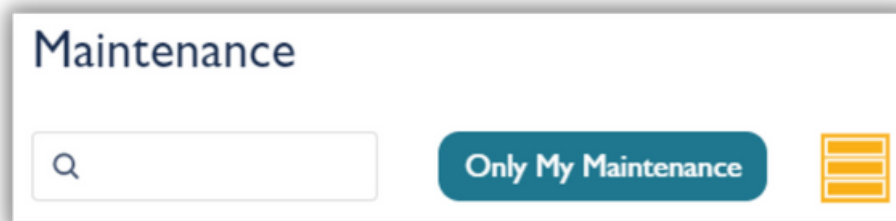


Tickets that are not due for the next 7 days.



Dates are color coded based on the categories above.

## 5. KANBAN View and LIST View.

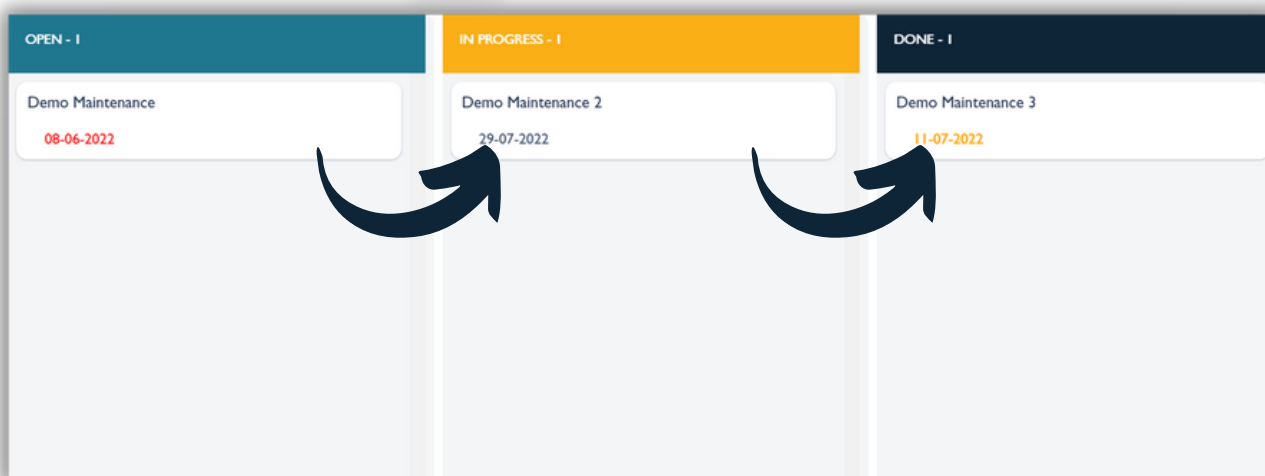


### LIST View



Done	Due Date ↑	Title	Property	Assigned To	Action
<input type="radio"/>	08-06-2022	Demo Maintenance	Demo Property	Adrian Clark Rodriguez	
<input type="radio"/>	29-07-2022	Demo Maintenance 2	Demo Property 2	Adrian Clark Rodriguez	
<input type="radio"/>	11-07-2022	Demo Maintenance 3	Demo Property 3	Adrian Clark Rodriguez	

### 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



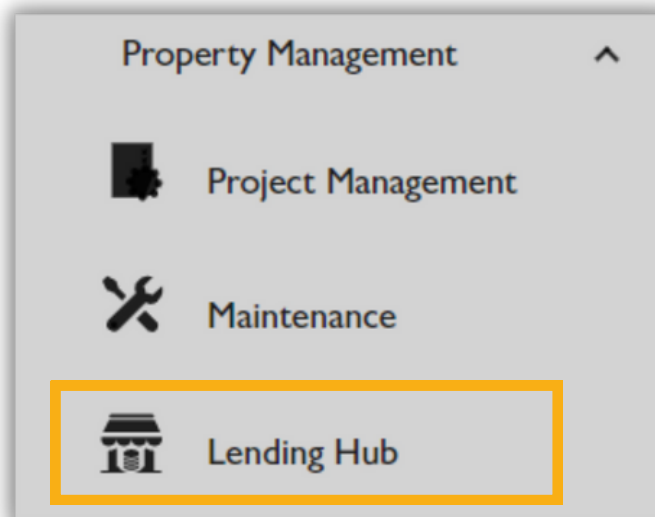
# LENDING HUB

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

Finance Provider	Reference	Property	Start Date	Fixed Rate End Date	Loan Amount	Action
Demo Lender		Demo Property	Jul 2, 2022	Jul 2, 2023	£75000	 

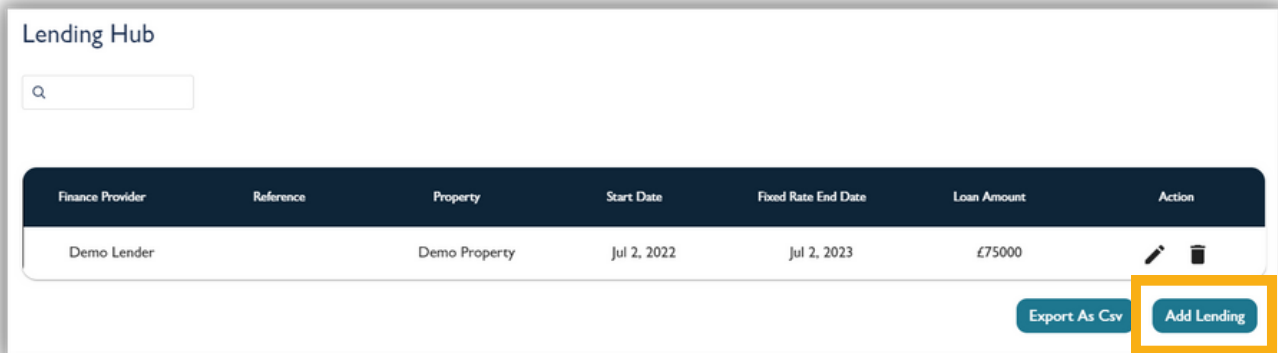
[Export As Csv](#) [Add Lending](#)



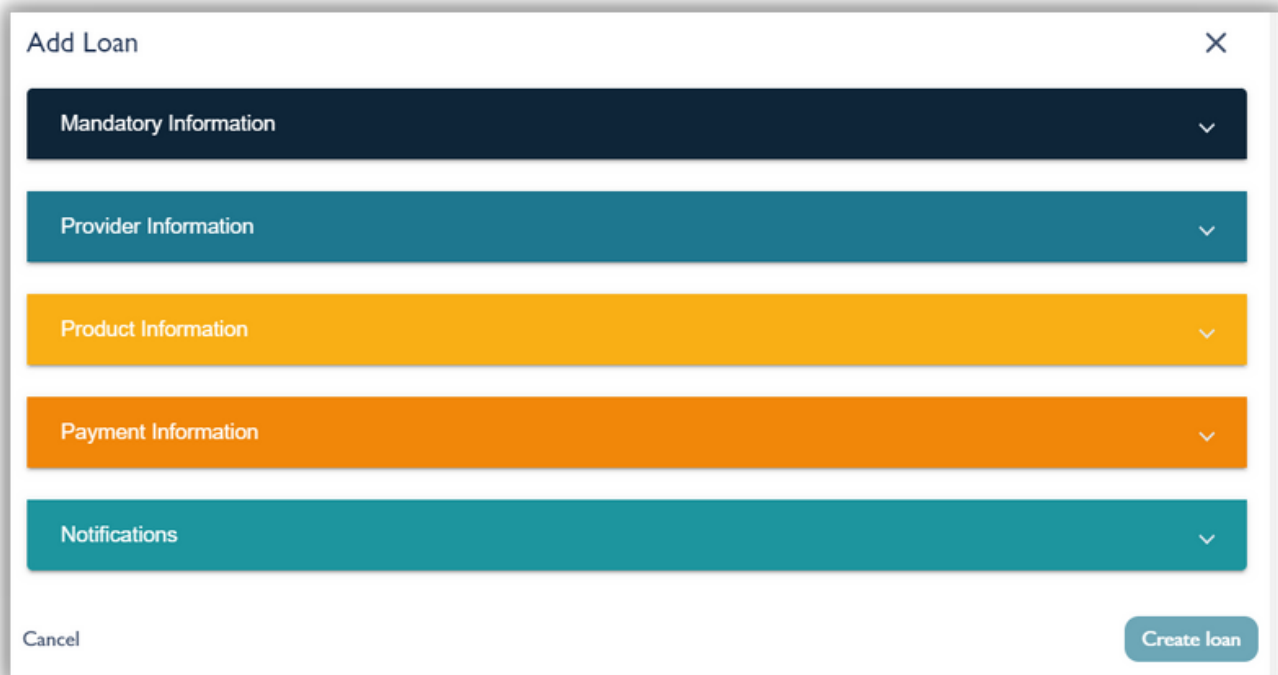
**LENDING HUB** can be found on the **GRAY SIDEBAR** under **PROPERTY MANAGEMENT**.

# ADDING LOANS

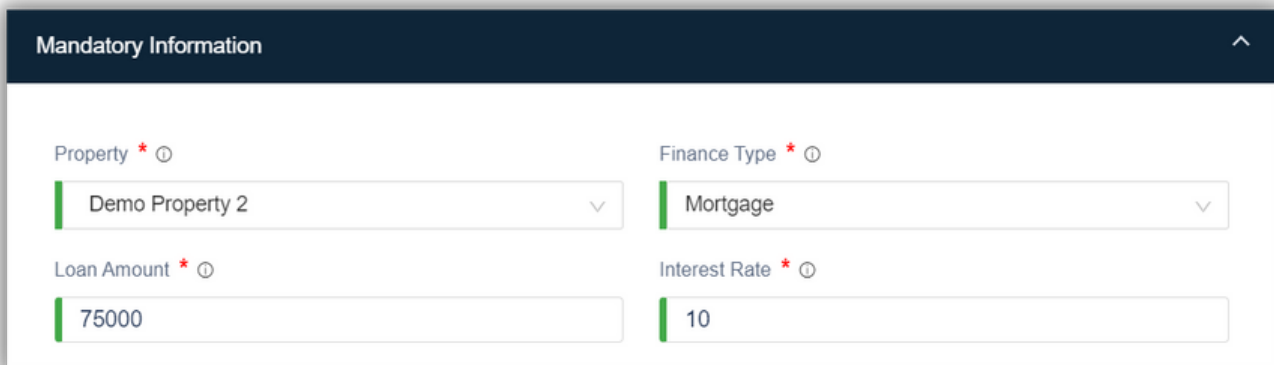
1. Click the "Add Lending" button.



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

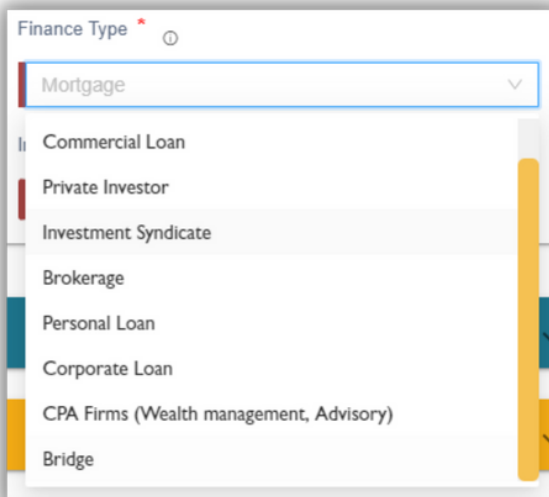


### 3. Mandatory Information Form



The screenshot shows a form titled "Mandatory Information" with a dark blue header. Below the header, there are four input fields arranged in a 2x2 grid. The top-left field is a dropdown menu labeled "Property" with a red asterisk and a help icon, containing the text "Demo Property 2". The top-right field is a dropdown menu labeled "Finance Type" with a red asterisk and a help icon, containing the text "Mortgage". The bottom-left field is a text input labeled "Loan Amount" with a red asterisk and a help icon, containing the number "75000". The bottom-right field is a text input labeled "Interest Rate" with a red asterisk and a help icon, containing the number "10".

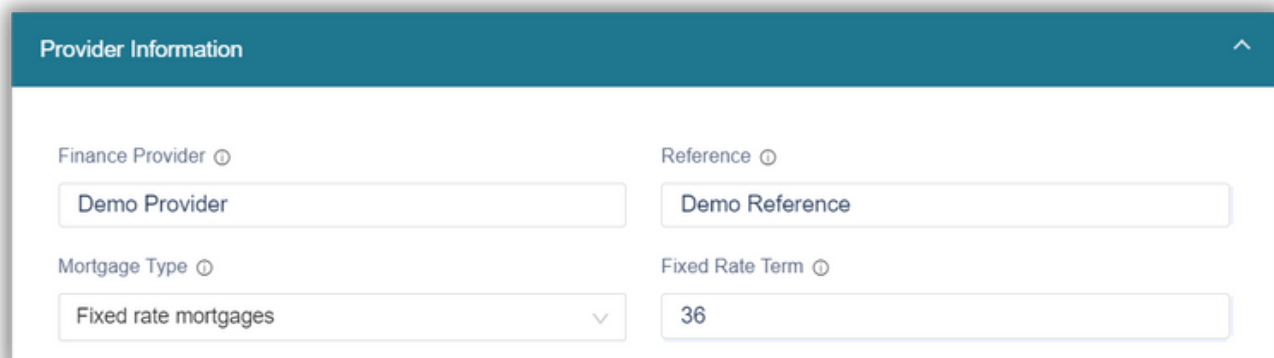
As you may have already guessed, the information here are required to add the loan to Property Store. The rest of the tabs below are optional but we suggest you fill in as it may come handy for you in the future if all the details are in one place. Associating a Property with the loan would make the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



The screenshot shows a dropdown menu for "Finance Type" with a red asterisk and a help icon. The menu is open, showing a list of options: "Mortgage" (selected), "Commercial Loan", "Private Investor", "Investment Syndicate", "Brokerage", "Personal Loan", "Corporate Loan", "CPA Firms (Wealth management, Advisory)", and "Bridge".

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

### 4. Provider Information Form



The screenshot shows a form titled "Provider Information" with a teal header. Below the header, there are four input fields arranged in a 2x2 grid. The top-left field is a text input labeled "Finance Provider" with a help icon, containing the text "Demo Provider". The top-right field is a text input labeled "Reference" with a help icon, containing the text "Demo Reference". The bottom-left field is a dropdown menu labeled "Mortgage Type" with a help icon, containing the text "Fixed rate mortgages". The bottom-right field is a text input labeled "Fixed Rate Term" with a help icon, containing the number "36".

## 5. Product Information Form

Product Information

Start Date

Equity Release Amount

Mortgage Product End date

Mortgage Term end date

Current Market Value

LTV %

Arrangement fee

Early Redemption?

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

## 6. Payment Information Form

Payment Information

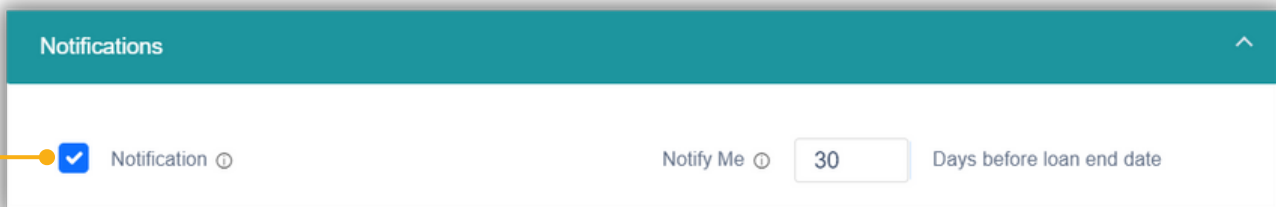
Payment

Payment Period

Deposit

First Payment Due Date

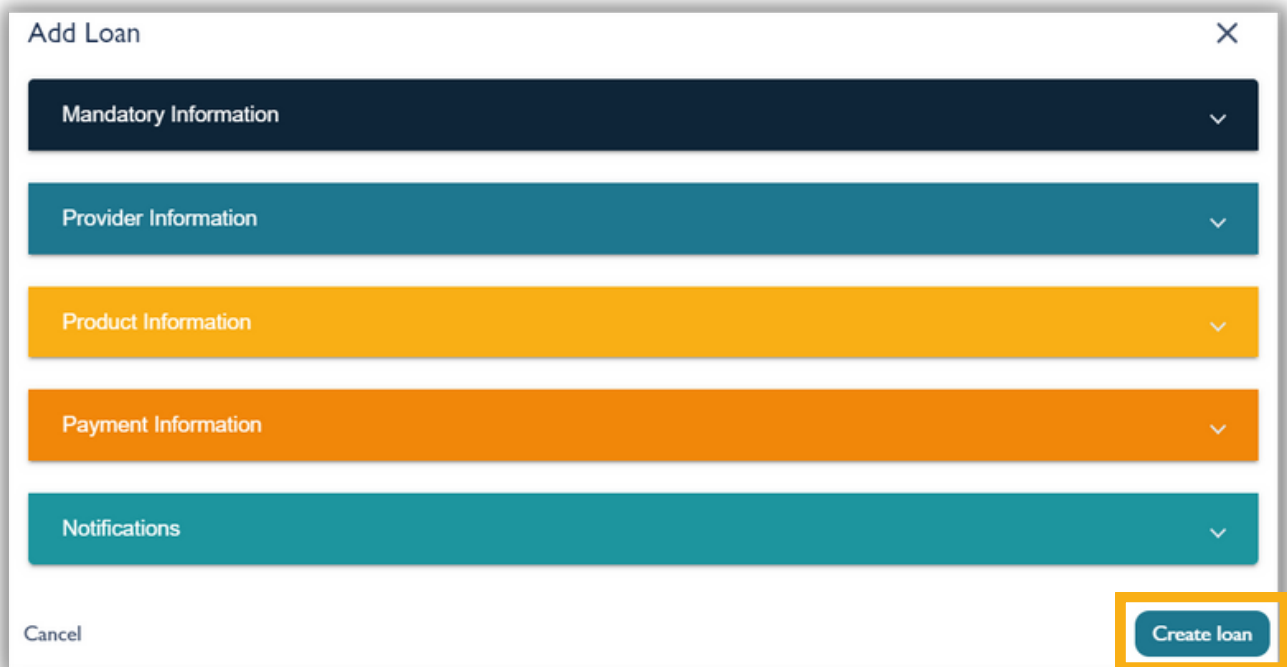
## 7. Notifications Form



The screenshot shows a 'Notifications' form with a teal header. Below the header, there is a checked checkbox labeled 'Notification' with a help icon. To the right, there is a 'Notify Me' label, a text input field containing the number '30', and the text 'Days before loan end date'.

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

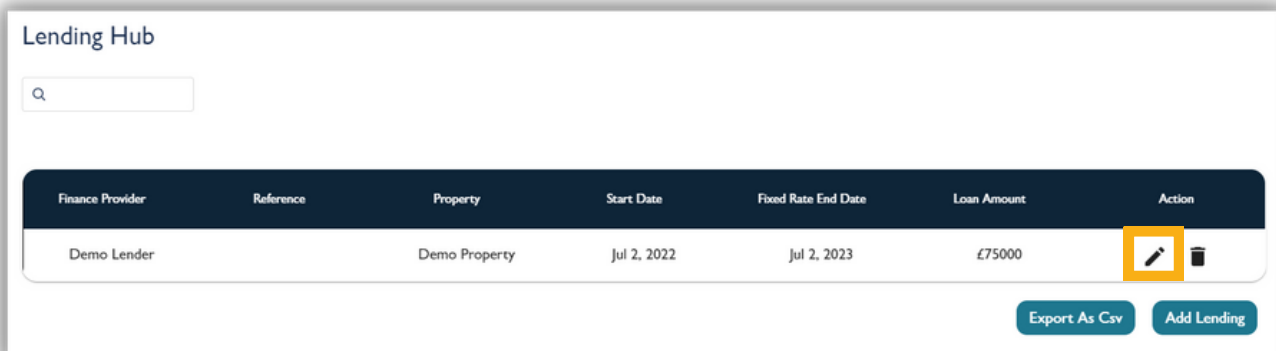
## 8. Finalize and click the "Create Loan" button.



The screenshot shows the 'Add Loan' form with a white background and a close button in the top right corner. The form is divided into five sections, each with a colored header and a dropdown arrow: 'Mandatory Information' (dark blue), 'Provider Information' (teal), 'Product Information' (yellow), 'Payment Information' (orange), and 'Notifications' (teal). At the bottom left is a 'Cancel' button, and at the bottom right is a 'Create loan' button, which is highlighted with a yellow border.



# EDITING LOANS

## 1. Click the Pencil Icon.



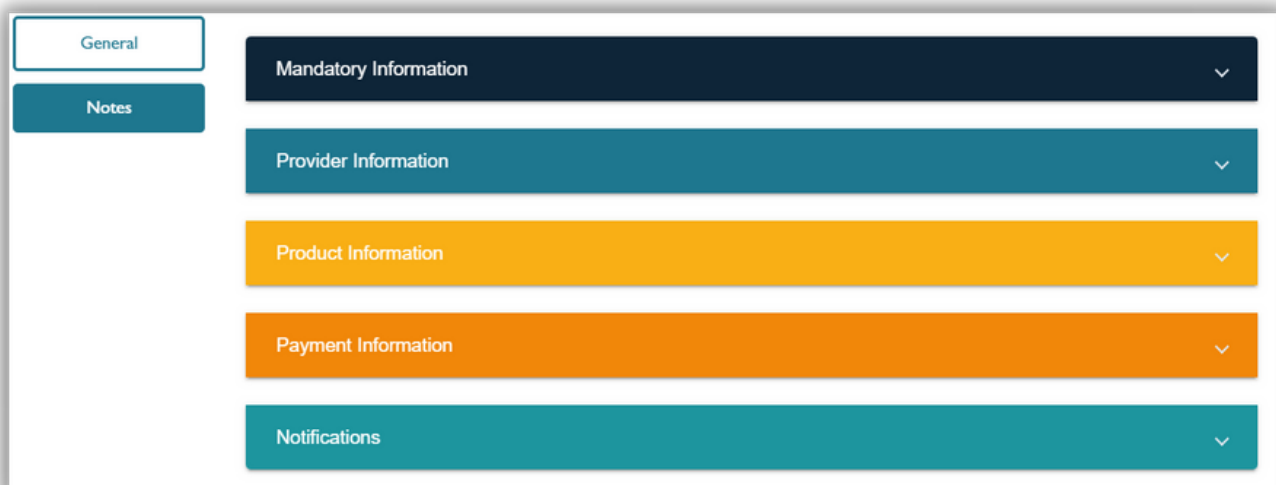
Lending Hub

Q

Finance Provider	Reference	Property	Start Date	Fixed Rate End Date	Loan Amount	Action
Demo Lender		Demo Property	Jul 2, 2022	Jul 2, 2023	£75000	 

Export As Csv Add Lending

## 2. Edit any Forms in the General Tab.

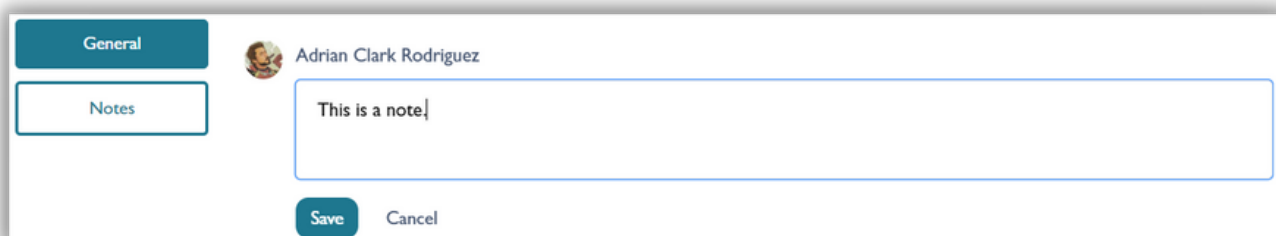


General

Notes


- Mandatory Information
- Provider Information
- Product Information
- Payment Information
- Notifications

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



General

Notes

 Adrian Clark Rodriguez

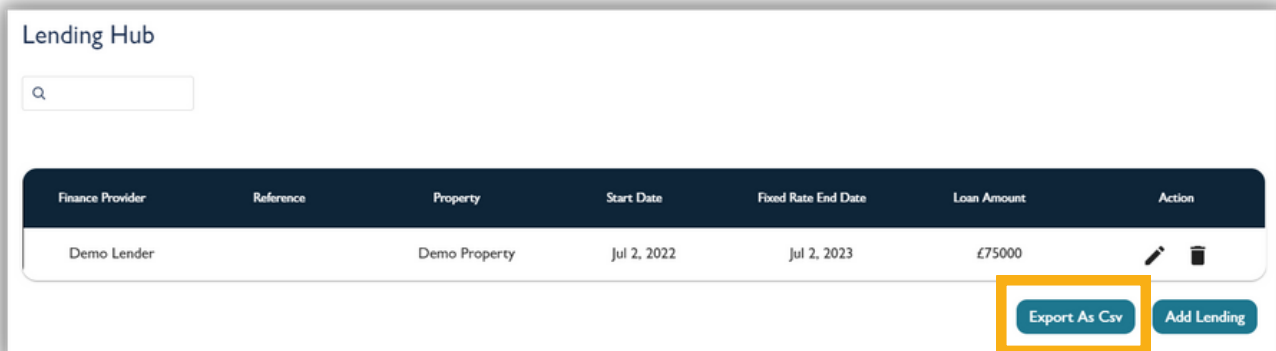
This is a note|

Save Cancel

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

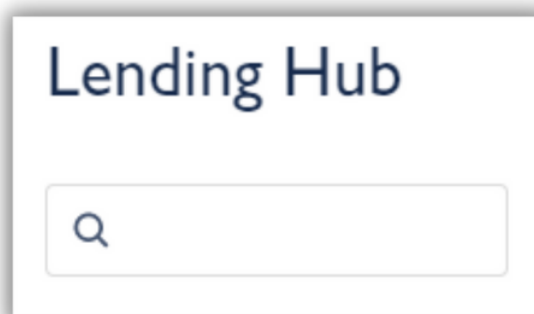
# OTHER FEATURES

## 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.

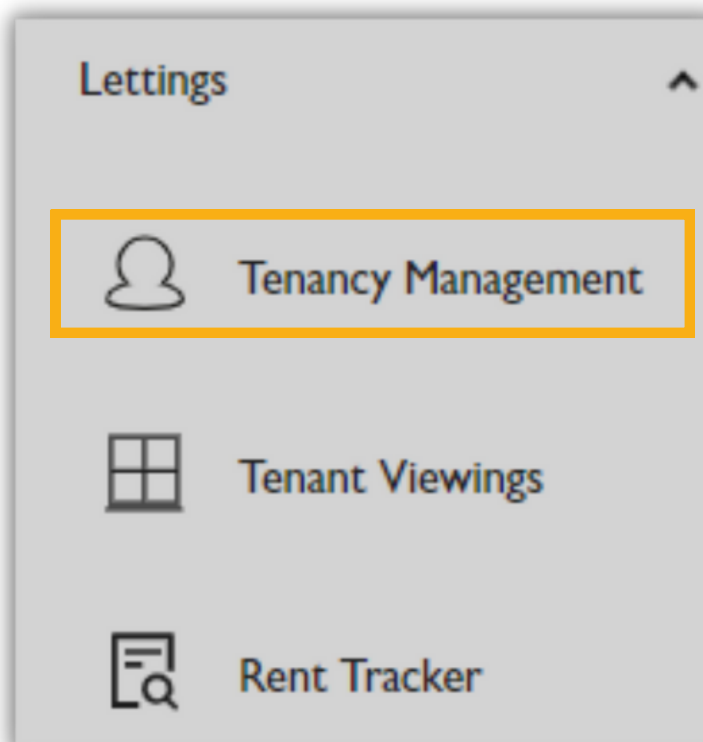
Tenancies Management

Tenancy Management

Q

New Tenancy

Tenancy	Tenant Management	Tenancy Type	Inspection Date	Letting Agent	Payment Frequency	Action
Demo Property	Full Management	AST	Every 3 Months?	Demo Letting Agent	Monthly	 
Demo Property 2	Self Managed	AST	Every 3 Months?			 
Demo Property 3	Let and Rent Collection	AST	Every 3 Months?	Demo Letting Agent	Monthly	 



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



# ADD TENANCY







## 1. Click the "New Tenancy" Button.

Tenancies Management

Tenancy Management Rent Tracker

Q

New Tenancy

Tenancy	Tenant Management	Tenancy Type	Inspection Date	Letting Agent	Payment Frequency	Action
Demo Property	Full Management	AST	Every 3 Months?	Demo Letting Agent	Monthly	 
Demo Property 2	Self Managed	AST	Every 3 Months?			 
Demo Property 3	Let and Rent Coll...	AST	Every 3 Months?	Demo Letting Agent	Monthly	 

## 2. Fill in the NEW TENANT form.

Property:

Tenant Management:

Tenancy Type:

Inspection Date:

Landlord:

Letting Agent:

Notification

Rental Income:

Fees:

Charging method:

Fee:

VAT:

Agent Fee Frequency:

Cancel

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.

Property: ⓘ  
Select Property ▼

Tenancy Type: ⓘ  
Select Type ▼

Landlord: ⓘ  
Select Landlord ▼

Notification ⓘ

Rental Income: ⓘ  
£

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

Tenant Management: ⓘ  
Dropdown ▼

Inspection Date: ⓘ  
Every 6 Months? ▼

Letting Agent: ⓘ  
Select Agent ▼

Notification ⓘ      Notify Me ⓘ       Days before the inspection date

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

Fees:

Charging method: ⓘ      Fee: ⓘ      VAT: ⓘ      Agent Fee Frequency: ⓘ

Percentage/Fixed Rate ▼      £/%      20%      Weekly ▼

Cancel      **Create Tenant**

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

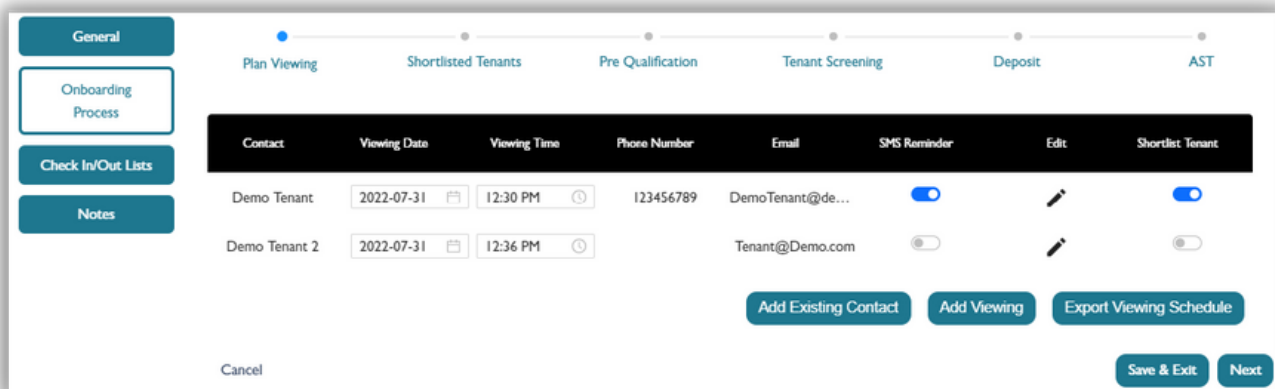
Click the "Create Tenant" button to finalize.

# ONBOARDING

1. Click the Pencil Icon beside the Property.

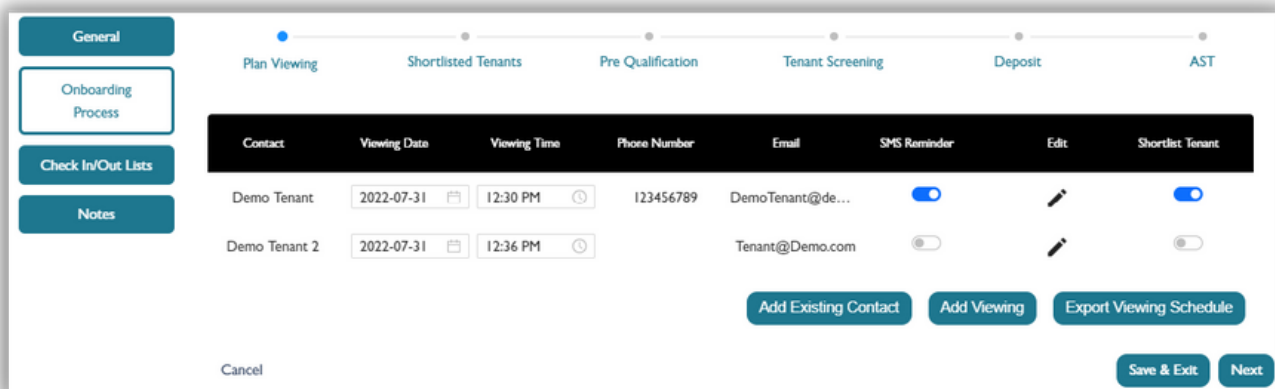
Tenancy	Tenant Management	Tenancy Type	Inspection Date	Letting Agent	Payment Frequency	Action
Demo Property	Full Management	AST	Every 3 Months?	Demo Letting Agent	Monthly	 
Demo Property 2	Self Managed	AST	Every 3 Months?			 
Demo Property 3	Let and Rent Collection	AST	Every 3 Months?	Demo Letting Agent	Monthly	 

2. Go to the Onboarding Process Tab.



The screenshot shows the 'Onboarding Process' tab with a progress bar at the top. The 'Plan Viewing' step is selected. Below the progress bar is a table with columns: Contact, Viewing Date, Viewing Time, Phone Number, Email, SMS Reminder, Edit, and Shortlist Tenant. Two tenants are listed: 'Demo Tenant' and 'Demo Tenant 2'. Below the table are buttons for 'Add Existing Contact', 'Add Viewing', and 'Export Viewing Schedule'. At the bottom right are 'Save & Exit' and 'Next' buttons.

3. Accomplish the Plan Viewing Step.



This screenshot is identical to the previous one, showing the 'Onboarding Process' tab with the 'Plan Viewing' step active. The table and buttons are the same as in the previous screenshot.

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.

Add Existing Contact

Demo Tenant

Add Tenant Cancel

#### 4. Arrange viewing and shortlist prospective tenants.

General

Onboarding Process

Rent Tracker

Notes

Plan Viewing Shortlisted Tenants Pre Qualification Deposit AST

Contact	Viewing Date	Viewing Time	Phone Number	Email	SMS Reminder	Edit	Shortlist Tenant
Demo Tenant	2022-07-31	12:30 PM	123456789	DemoTenant@dem...	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>
Demo Tenant 2	2022-07-31	12:36 PM		Tenant@Demo.com	<input type="checkbox"/>		<input type="checkbox"/>

Add Existing Contact Add Viewing Export Viewing Schedule

Cancel Save & Exit Next

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.

The screenshot shows a progress bar at the top with five stages: Plan Viewing, Shortlisted Tenants (active), Pre Qualification, Deposit, and AST. Below the progress bar, a dropdown menu is set to 'Demo Tenant- Tenant #0 (Total Score)'. To the right of this dropdown is a radio button labeled 'Progress Tenant?' which is selected and highlighted with a yellow box. Below the dropdown are two rows of input fields: 'Do you have any pets?' with 'No' and a score of '10', and 'What is your annual income?' with '60k' and a score of '8'. There is a '+ New question' link below these fields. At the bottom left is an 'Export as CSV' button. At the bottom right are 'Cancel', 'Back', 'Skip', 'Save & Exit', and 'Next' buttons, with 'Next' highlighted by a yellow box.

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.

The screenshot shows a progress bar at the top with five stages: Plan Viewing, Shortlisted Tenants, Pre Qualification (active), Deposit, and AST. Below the progress bar, the 'Tenancy Start Date' is set to '2022-08-01'. There are three checked checkboxes: 'Right to rent check completed?', 'Tenant Submitted Application?', and 'Pre Tenancy Check Completed?'. There is an unchecked checkbox for 'Joint Tenancy?'. The 'Rental Frequency' is set to 'Monthly'. Below this is a section for 'Let the tenancy expire after end date?' with 'Periodic' selected and 'Let Expire' unselected. There is an unchecked checkbox for 'Guarantor?'. There is a checked checkbox for 'Notification' with a 'Notify Me' field set to '60' and the text 'Days before the tenancy end date'. At the bottom left is a 'Cancel' button. At the bottom right are 'Back', 'Skip', 'Save & Exit', and 'Next' buttons.

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.

The screenshot shows a multi-step process with the following steps: Plan Viewing, Shortlisted Tenants, Pre Qualification, Tenant Screening (selected), Deposit, and AST. On the left, there are buttons for General, Onboarding Process, Check In/Out Lists, and Notes. The main content area displays two options:

- Full Tenant Profile Express  
TenantScreening.co.uk will attempt to verify the applicant's employment details by email, information about the applicant's current employment, length of service and salary information are obtained. TenantScreening.co.uk will also verify any other incomes such as part time work or benefits income. If the applicant is self-employed we will obtain a reference from their accountant or verify income from current bank statements.
- Full tenant profile + Right to Rent Check  
TenantScreening.co.uk will attempt to verify the applicant's employment details by email, information about the applicant's current employment, length of service and salary information are obtained. TenantScreening.co.uk will also verify any other incomes such as part time work or benefits income. If the applicant is self-employed we will obtain a reference from their accountant or verify income from current bank statements. Since the 1st February 2016 landlords/agents across England must check to determine the immigration status of all prospective adult tenants by checking ID before the start of a tenancy.

Full Tenant Profile Express  
TenantScreening.co.uk will attempt to verify the applicant's employment details by email, information about the applicant's current employment, length of service and salary information are obtained. TenantScreening.co.uk will also verify any other incomes such as part time work or benefits income. If the applicant is self-employed we will obtain a reference from their accountant or verify income from current bank statements.

~~£ 32.95~~  
£ 29.65 Plus VAT  
Start application

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.

The screenshot shows a progress bar at the top with six steps: Plan Viewing, Shortlisted Tenants, Pre Qualification, Tenant Screening, Deposit (highlighted), and AST. Below the progress bar, there are several input fields and checkboxes:

- Deposit Organisations:** A dropdown menu with "Tenancy Deposit Scheme" selected.
- Deposit paid to organisations?:** A checked checkbox.
- Has the deposit info been provided to the tenant?:** A checked checkbox.
- Reference Number:** A text input field containing "123456789".
- Deposit Due Amount:** A text input field containing "10000".
- Date:** A date picker showing "2022-07-26".

At the bottom, there are buttons for "Cancel", "Back", "Skip", "Save & Exit", and "Next".

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.

The screenshot shows the same progress bar as in the previous step, with the "AST" step highlighted. Below the progress bar, there is a large text area labeled "AST Addendum" with a small "AST Addendum" label above it. At the bottom left of this text area, there is a button labeled "Create AST" which is highlighted with a yellow border. At the bottom of the form, there are buttons for "Cancel", "Back", "Save & Exit", and "Finish".

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.

Tenancy	Tenant Management	Tenancy Type	Inspection Date	Letting Agent	Payment Frequency	Action
Demo Property	Full Management	AST	Every 3 Months?	Demo Letting Agent	Monthly	 
Demo Property 2	Self Managed	AST	Every 3 Months?			 
Demo Property 3	Let and Rent Collection	AST	Every 3 Months?	Demo Letting Agent	Monthly	 

2. Edit any field in General Tab.

Property:

Tenant Management:

Tenancy Type:

Inspection Date:

Landlord:

Letting Agent:

Notification  Days before the inspection date

Rental Income:


Fees:

Charging method:  Fee:  VAT:  Agent Fee Frequency:

Cancel

3. Add anything you want in the Notes Tab.

- General
- Onboarding Process
- Check In/Out Lists
- Notes

 Demo First Demo Last

Pro tip: press **SHIFT + M** to add a note

4. Onboarding Process Tab.

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



## 5. Accomplish the Check In/Out Lists

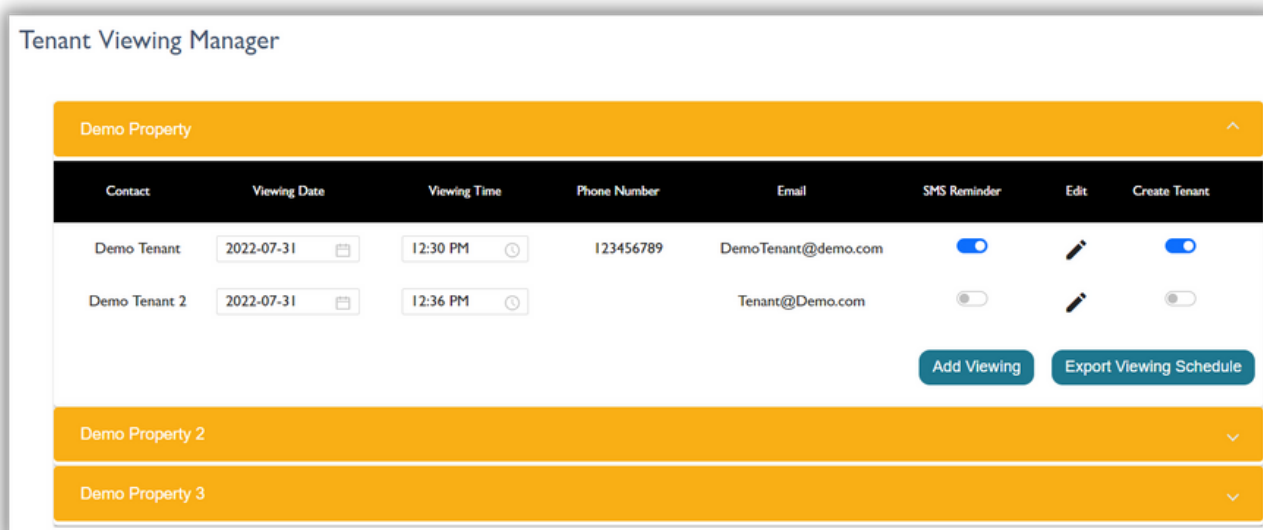
General		Check In List					
<b>General</b> Check in date: <input type="text" value="Choose Date"/>		<b>Safety Certs</b> Gas Safety issued: <input type="radio"/> Yes <input type="radio"/> No		<b>Others</b> Welcome Pack Issued: <input type="radio"/> Yes <input type="radio"/> No			
EPC issued: <input type="radio"/> Yes <input type="radio"/> No		Electrical Safety Issued: <input type="radio"/> Yes <input type="radio"/> No		Landlord Contact Details Provided: <input type="radio"/> Yes <input type="radio"/> No			
Tenancy Agreement Signed: <input type="radio"/> Yes <input type="radio"/> No		EPC Issued: <input type="radio"/> Yes <input type="radio"/> No		Emergency Contact Details Provided: <input type="radio"/> Yes <input type="radio"/> No			
Privacy Notice Issued: <input type="radio"/> Yes <input type="radio"/> No		Fire Risk Assessment: <input type="radio"/> Yes <input type="radio"/> No		Service Suppliers Notified: <input type="radio"/> Yes <input type="radio"/> No			
Right to rent check: <input type="radio"/> Yes <input type="radio"/> No		Legionnaires Assessment: <input type="radio"/> Yes <input type="radio"/> No		Sets of keys issued: <input type="text"/>			
<b>Deposit Protection</b> Protected: <input type="radio"/> Yes <input checked="" type="radio"/> No		<b>Inventory</b> Inventory Carried Out: <input type="radio"/> Yes <input type="radio"/> No		<b>Alarm Checks</b> Smoke Alarms Tested: <input type="radio"/> Yes <input type="radio"/> No			
Protection Date: 2022-07-26		Inventory Signed by Tenant: <input type="radio"/> Yes <input type="radio"/> No		CO Alarm Tested: <input type="radio"/> Yes <input type="radio"/> No			
Certificate copy given to tenant: <input checked="" type="radio"/> Yes <input type="radio"/> No							

Check Out List					
<b>General</b> Checkout Date: <input type="text" value="Choose Date"/>		<b>Inventory</b> Inventory Carried Out: <input type="radio"/> Yes <input type="radio"/> No		<b>Others</b> Service Suppliers Notified?: <input type="radio"/> Yes <input type="radio"/> No	
Key(s) Returned: <input type="radio"/> Yes <input type="radio"/> No		Inventory Signed by Tenant: <input type="radio"/> Yes <input type="radio"/> No		Forwarding Address Recorded?: <input type="radio"/> Yes <input type="radio"/> No	
<b>Deposit Protection</b> Deposit Returned: <input type="radio"/> Yes <input type="radio"/> No		<b>Forwarding Address</b> Forwarding Address: <input type="text"/>			
Date Returned: <input type="text" value="Choose Date"/>					
Amount Returned: £ <input type="text"/>					

[Update](#)

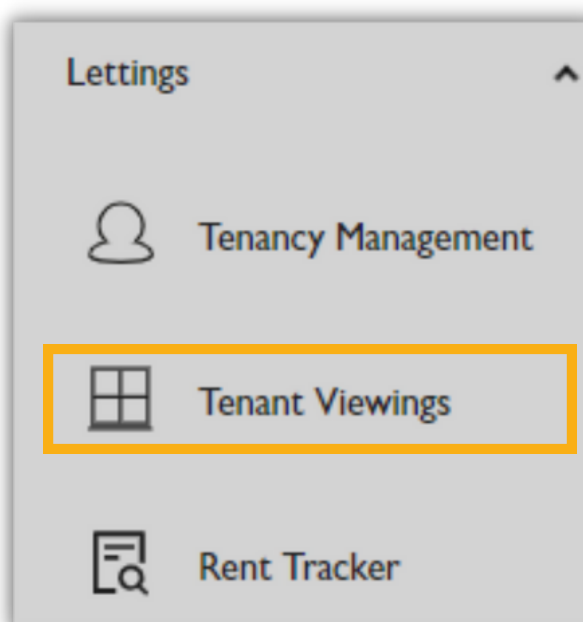
# TENANT VIEWING MANAGER

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.



The screenshot shows the 'Tenant Viewing Manager' interface. At the top, there's a header 'Tenant Viewing Manager' and a dropdown menu for 'Demo Property'. Below this is a table with columns: Contact, Viewing Date, Viewing Time, Phone Number, Email, SMS Reminder, Edit, and Create Tenant. The table contains two rows of data. Below the table are two buttons: 'Add Viewing' and 'Export Viewing Schedule'. At the bottom, there are two more dropdown menus for 'Demo Property 2' and 'Demo Property 3'.

Contact	Viewing Date	Viewing Time	Phone Number	Email	SMS Reminder	Edit	Create Tenant
Demo Tenant	2022-07-31	12:30 PM	123456789	DemoTenant@demo.com	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>
Demo Tenant 2	2022-07-31	12:36 PM		Tenant@Demo.com	<input type="checkbox"/>		<input type="checkbox"/>

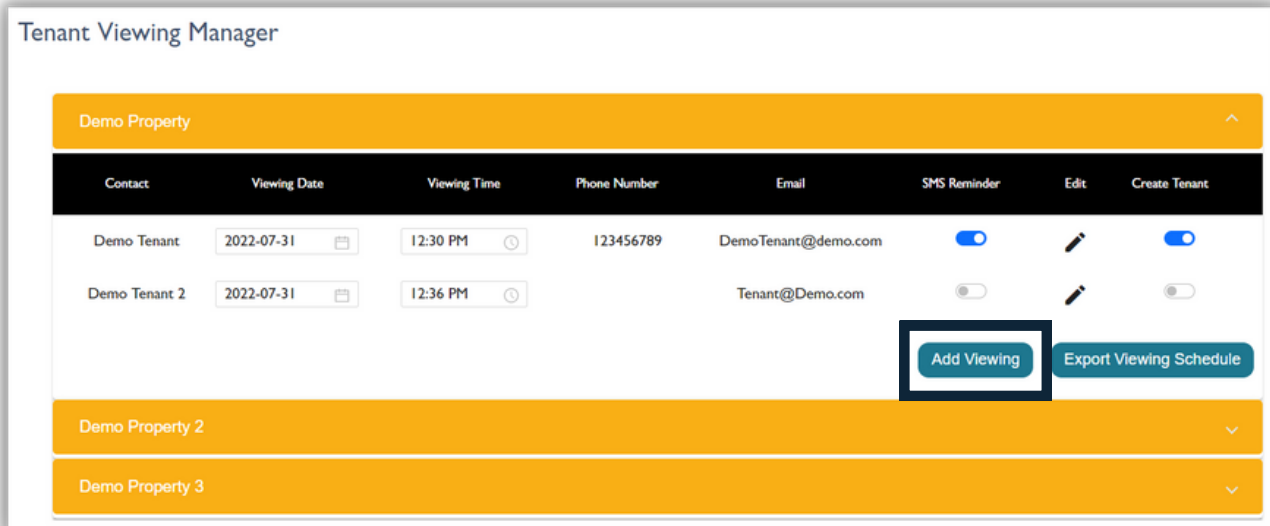


The screenshot shows a sidebar menu titled 'Lettings'. It contains three items: 'Tenancy Management' with a person icon, 'Tenant Viewings' with a calendar icon (highlighted with a yellow border), and 'Rent Tracker' with a document icon.

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

# MANAGE VIEWINGS

1. Click the "Add Viewing" Button.

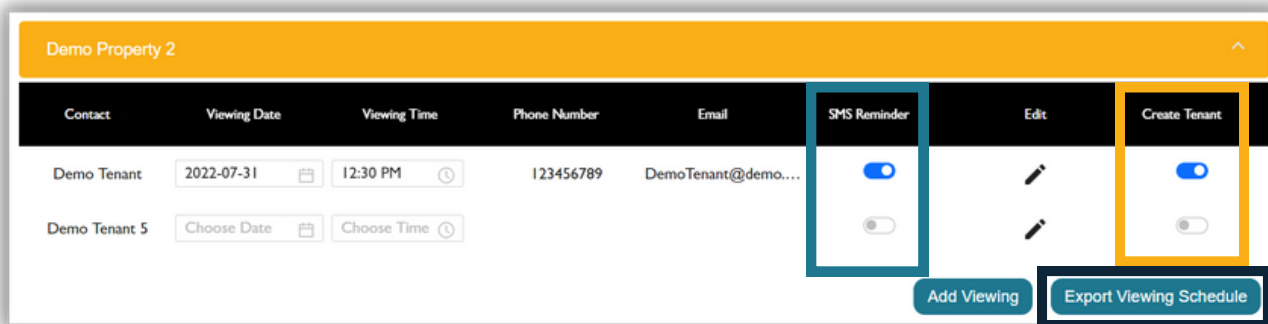


2. Fill in the details of the tenant on the Form.

The 'Create Contact' form is shown with the following fields and values:

- Title: Mr
- Pronoun: He/Him
- First Name: Demo
- Last Name: Tenant

### 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.

Tenancy	Tenant Management	Tenancy Type	Inspection Date	Letting Agent	Payment Frequency	Action
Demo Property	Full Management	AST	Every 3 Months?	Demo Letting Agent	Monthly	 
Demo Property 2	Self Managed	AST	Every 3 Months?			 
Demo Property 3	Let and Rent Collection	AST	Every 3 Months?	Demo Letting Agent	Monthly	 



2. Edit any field in General Tab.

CONT-02335
Give Feedback  


General  
Properties  
Notes

Title <small>⊙</small>	<input type="text" value="Mr"/>	Pronoun <small>⊙</small>	<input type="text" value="Select Pronoun"/>
First Name <small>⊙</small>	<input type="text" value="Demo"/>	Last Name <small>⊙</small>	<input type="text" value="Tenant"/>
Company Name <small>⊙</small>	<input type="text"/>	Role <small>⊙</small>	<input type="text" value="Tenant"/>
Email <small>⊙</small>	<input type="text" value="DemoTenant@demo.com"/>	Phone Number <small>⊙</small>	<input type="text" value="123456789"/>
Address <small>⊙</small>	<input type="text"/>	Country <small>⊙</small>	<input type="text"/>
Room Number <small>⊙</small>	<input type="text" value="0"/>	Rent <small>⊙</small>	£ 1000.00
Start Date <small>⊙</small>	<input type="text" value="Choose a date 01/07/2022"/>	End Date <small>⊙</small>	<input type="text" value="Choose a date 01/10/2022"/>
Tenancy Type <small>⊙</small>	<input type="text"/>	Contact Owner <small>⊙</small>	<input type="text"/>

3. Edit anything in the Notes Tab.

CONT-02335
Give Feedback  

General  
Properties  
Notes

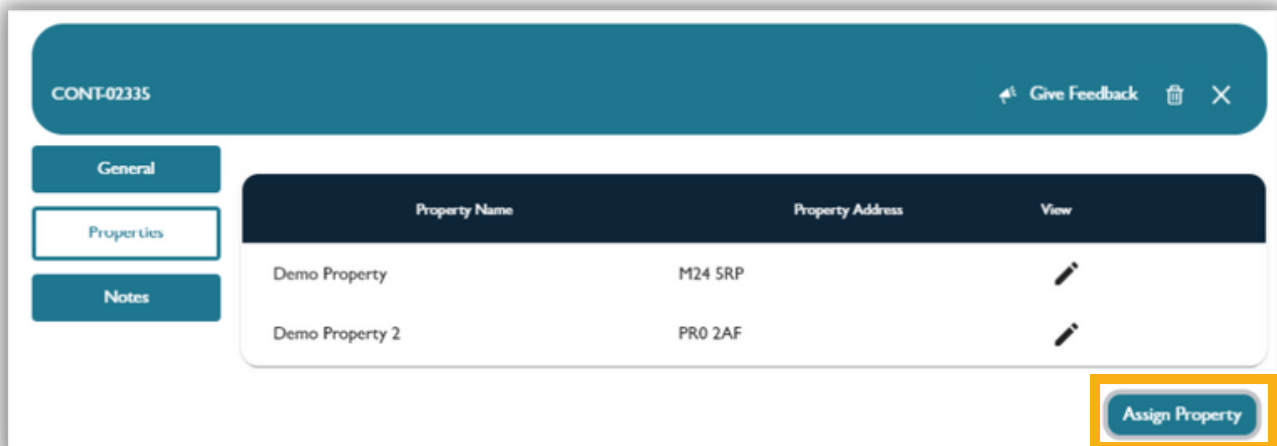

Demo First Demo Last

Add a note

Pro tip: press **SHIFT + M** to add a note

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

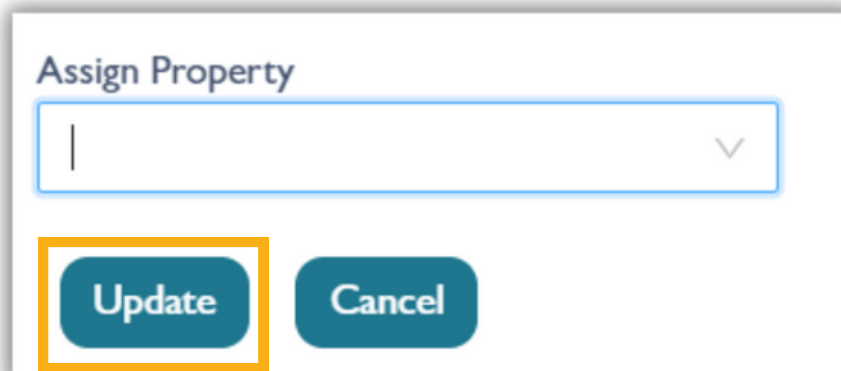
## 4. Reassign tenant to a different Property.



The screenshot shows a user interface for managing a tenant (CONT-02335). On the left, there are three tabs: 'General', 'Properties', and 'Notes'. The 'Properties' tab is active, displaying a table with two rows of property information. The table has columns for 'Property Name', 'Property Address', and 'View'. The 'View' column contains edit icons. A yellow box highlights the 'Assign Property' button located at the bottom right of the interface.

Property Name	Property Address	View
Demo Property	M24 SRP	
Demo Property 2	PR0 2AF	

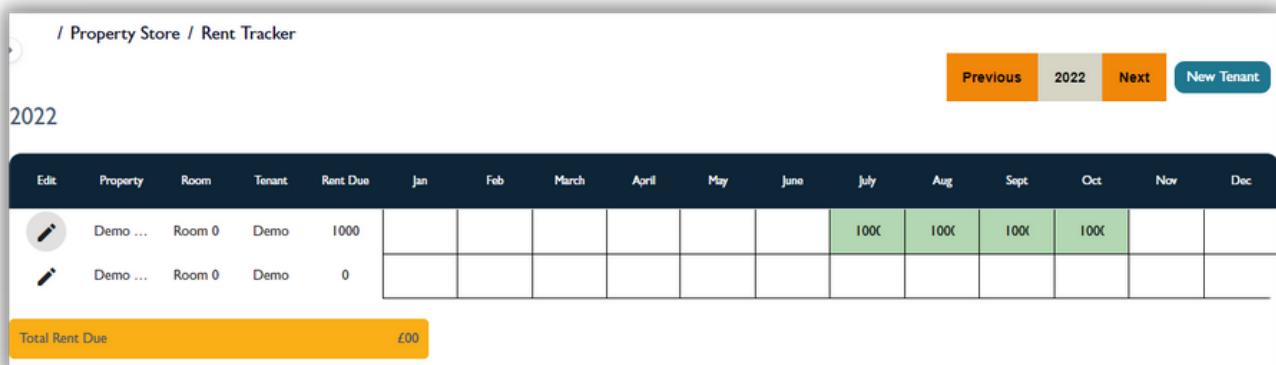
You may click the "Assign Property" button so that you may reassign your tenant to a different property in case that situation occurs. The Assign Property Form will show and simply find the new property for your tenant in the dropdown list and click the "Update" button to finalize changes.



The screenshot shows the 'Assign Property' form. It features a dropdown menu with a vertical line and a downward arrow. Below the dropdown are two buttons: 'Update' and 'Cancel'. The 'Update' button is highlighted with a yellow box.

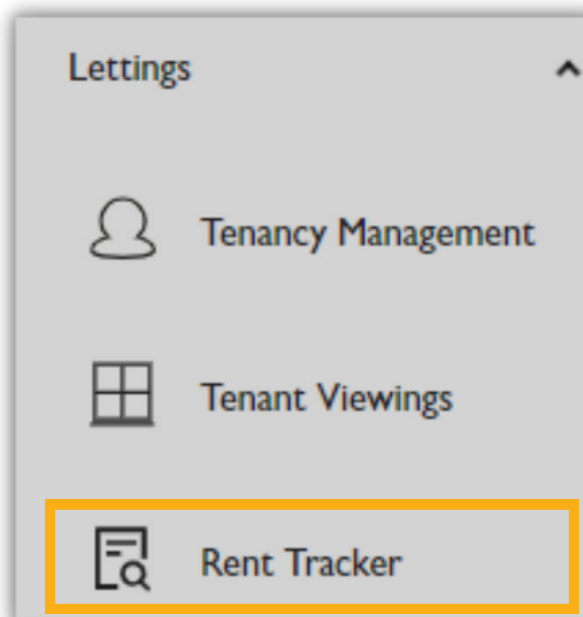
# RENT TRACKER

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.



The screenshot shows the 'Property Store / Rent Tracker' interface. At the top right, there are navigation buttons: 'Previous', '2022', 'Next', and 'New Tenant'. Below this is a table with columns for months (Jan to Dec) and rows for tenants. The first row shows a tenant with a rent due of 1000, with values of 1000 for July, August, September, and October. The second row shows a tenant with a rent due of 0. At the bottom, a yellow bar indicates 'Total Rent Due £00'.

Edit	Property	Room	Tenant	Rent Due	Jan	Feb	March	April	May	June	July	Aug	Sept	Oct	Nov	Dec
	Demo ...	Room 0	Demo	1000							1000	1000	1000	1000		
	Demo ...	Room 0	Demo	0												
Total Rent Due				£00												



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

# TRACKING RENT

## I. Set the monthly rent of your tenant.

/ Property Store / Rent Tracker

2022

Previous 2022 Next New Tenant

Edit	Property	Room	Tenant	Rent Due	Jan	Feb	March	April	May	June	July	Aug	Sept	Oct	Nov	Dec
	Demo ...	Room 0	Demo	1000							1000	1000	1000	1000		
	Demo ...	Room 0	Demo	0												

Total Rent Due £00

Click the Pencil Icon beside the chosen tenant.

General Properties Notes

Title  Pronoun

First Name  Last Name

Company Name  Role

Email  Phone Number

Address  Country

Room Number  Rent

Start Date  End Date

Tenancy Type  Contact Owner

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.

Edit	Property	Room	Tenant	Rent Due	Jan	Feb	March	April	May	June	July	Aug	Sept	Oct	Nov	Dec
	Demo ...	Room 0	Demo	1000							1000	1000	1000	1000		
	Demo ...	Room 0	Demo	600												

Total Rent Due £600

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.



General	Previous 2022 Next New Tenant																
Onboarding Process	2022																
Rent Tracker	Edit	Property	Room	Tenant	Rent ...	Jan	Feb	March	April	May	June	July	Aug	Sept	Oct	Nov	Dec
Notes	Dem...	Room 0	Demo	1000								1000	1000	0			
Total Rent Due					£00												

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.

July	Aug
1000	1000

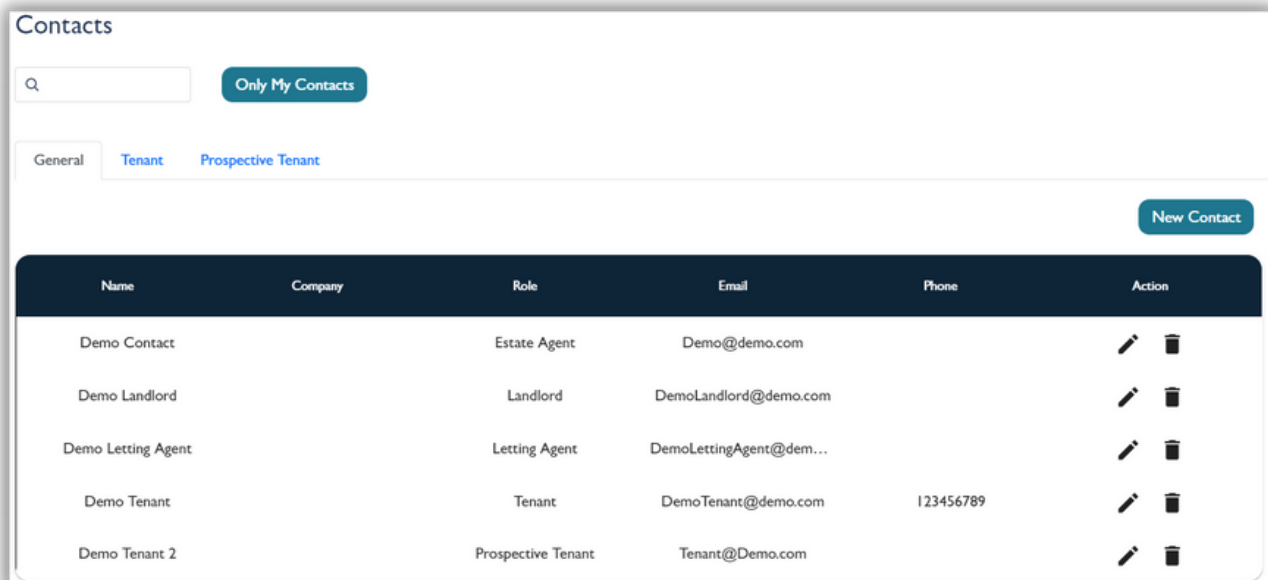
Green indicates the rent has been collected.

Sept
0

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

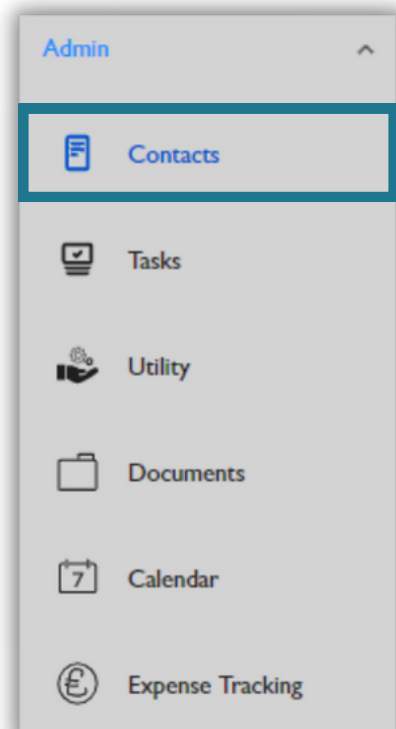
# CONTACTS

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.



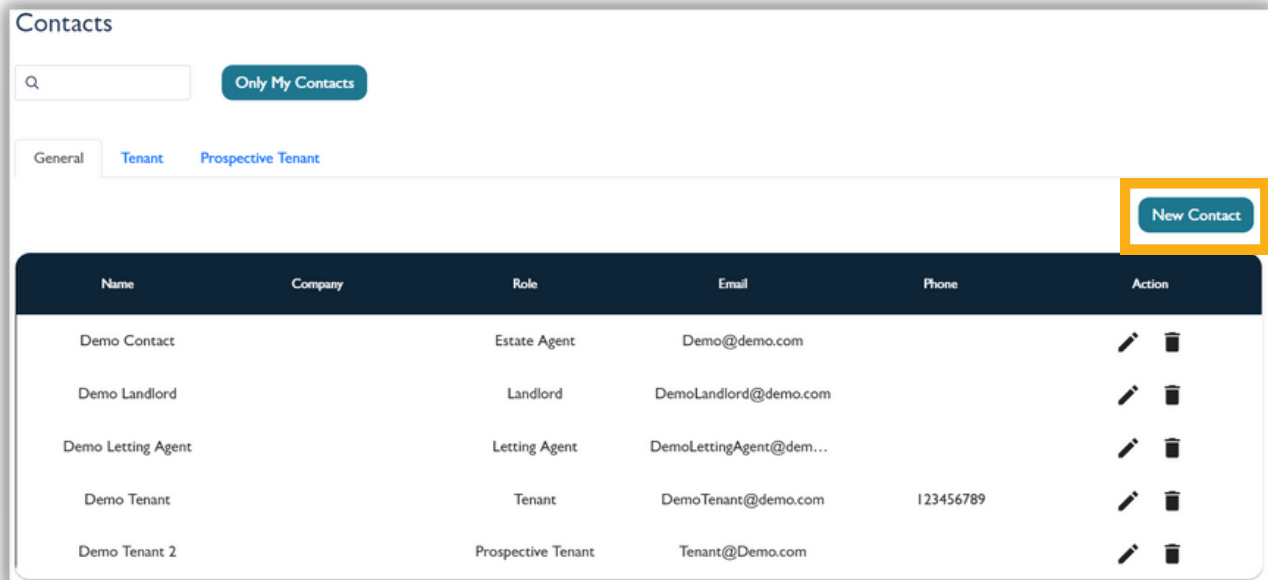
Name	Company	Role	Email	Phone	Action
Demo Contact		Estate Agent	Demo@demo.com		
Demo Landlord		Landlord	DemoLandlord@demo.com		
Demo Letting Agent		Letting Agent	DemoLettingAgent@dem...		
Demo Tenant		Tenant	DemoTenant@demo.com	123456789	
Demo Tenant 2		Prospective Tenant	Tenant@Demo.com		

**CONTACTS** can be found on the **GRAY SIDEBAR** under **ADMIN**.













# CREATE CONTACT

I. Click the CREATE CONTACT button.



The screenshot shows a web interface for managing contacts. At the top, there's a search bar and a filter button labeled 'Only My Contacts'. Below that are tabs for 'General', 'Tenant', and 'Prospective Tenant'. A 'New Contact' button is highlighted with an orange border. The main area contains a table with columns for Name, Company, Role, Email, Phone, and Action.

Name	Company	Role	Email	Phone	Action
Demo Contact		Estate Agent	Demo@demo.com		 
Demo Landlord		Landlord	DemoLandlord@demo.com		 
Demo Letting Agent		Letting Agent	DemoLettingAgent@dem...		 
Demo Tenant		Tenant	DemoTenant@demo.com	123456789	 
Demo Tenant 2		Prospective Tenant	Tenant@Demo.com		 

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

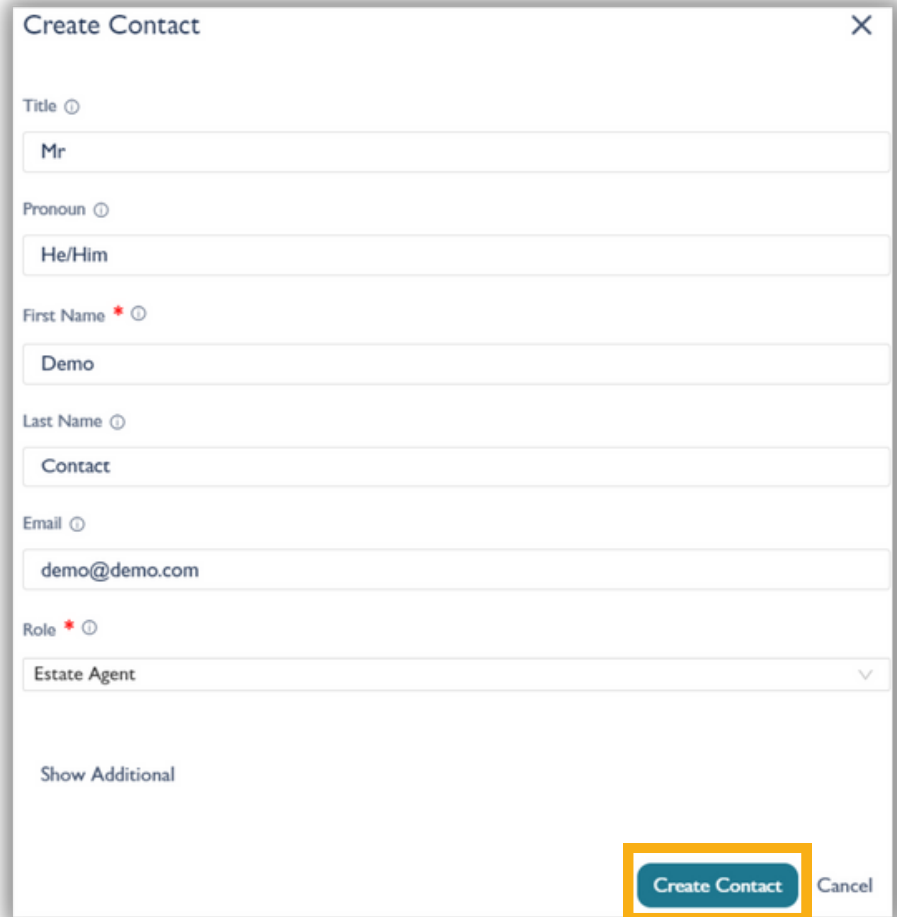


## 2. Fill in the CREATE CONTACT Form.

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.



Create Contact

Title ⓘ  
Mr

Pronoun ⓘ  
He/Him

First Name \* ⓘ  
Demo

Last Name ⓘ  
Contact

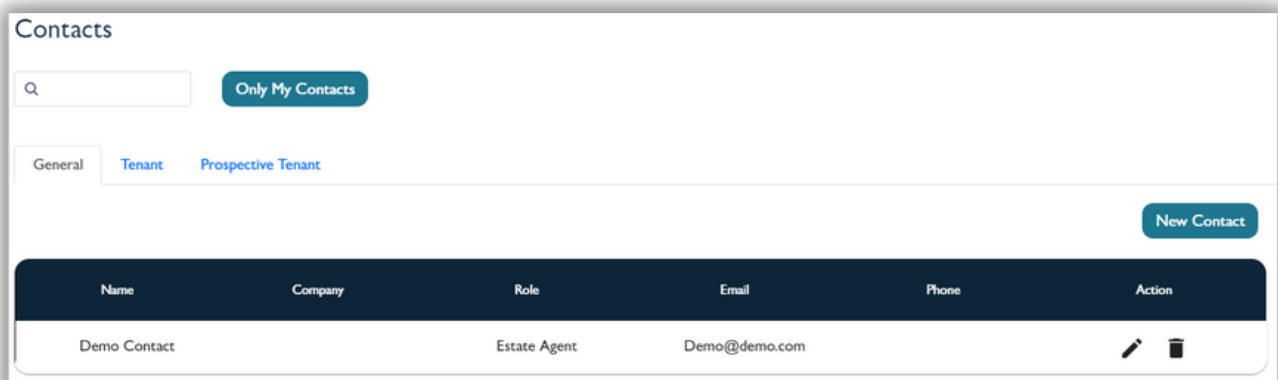
Email ⓘ  
demo@demo.com

Role \* ⓘ  
Estate Agent

Show Additional

Create Contact Cancel

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




Contacts

Q Only My Contacts











General Tenant Prospective Tenant

New Contact

Name	Company	Role	Email	Phone	Action
Demo Contact		Estate Agent	Demo@demo.com		 

# EDIT CONTACT

1. Click the Pencil Icon beside the chosen Contact.

Name	Company	Role	Email	Phone	Action
Demo Contact		Estate Agent	Demo@demo.com		 
Demo Landlord		Landlord	DemoLandlord@demo.com		 
Demo Letting Agent		Letting Agent	DemoLettingAgent@dem...		 
Demo Tenant		Tenant	DemoTenant@demo.com	123456789	 
Demo Tenant 2		Prospective Tenant	Tenant@Demo.com		 

## General Tab

General

Properties

Notes

Title ⓘ

First Name ⓘ

Company Name ⓘ

Email ⓘ

Address ⓘ

Day Rate ⓘ

Choose a date ⓘ

Pronoun ⓘ

Last Name ⓘ

Role ⓘ

Phone Number ⓘ

Country ⓘ

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

Property Name	Property Address	View
Demo Property	M24 SRP	

Assign Property

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

Adrian Clark Rodriguez

Add a note

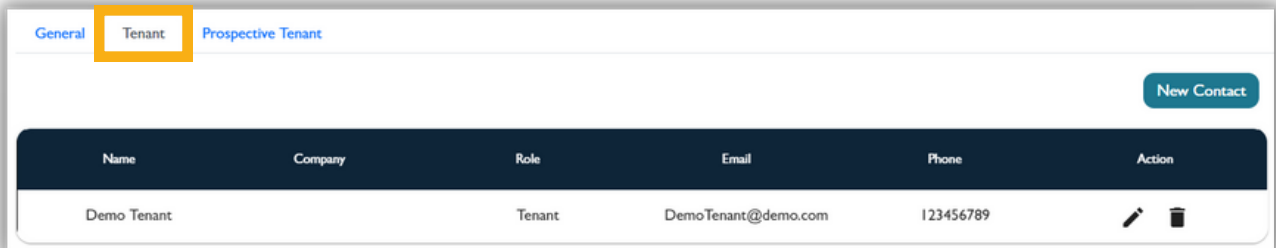
Pro tip: press **SHIFT + M** to add a note

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

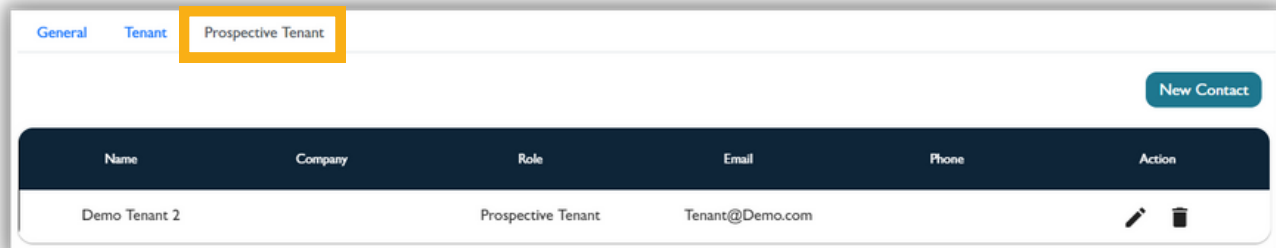
# OTHER FEATURES

1. Shortlisted Tenants are separated from the others.

## Tenants Tab

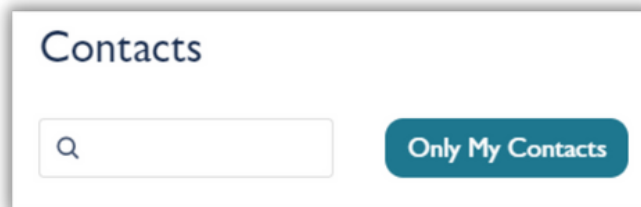


## Prospective Tenant Tab



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.

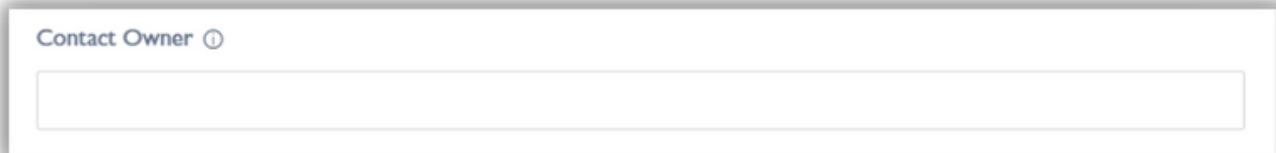
## 2. CONTACTS search function.



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

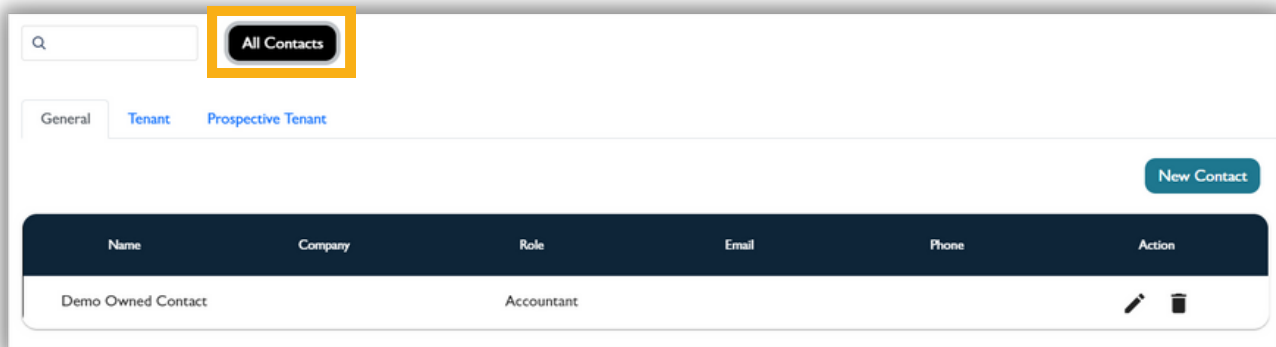
## Only My Contacts

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:





A screenshot of a form field labeled "Contact Owner" with a help icon. Below the label is an empty rectangular input box.

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



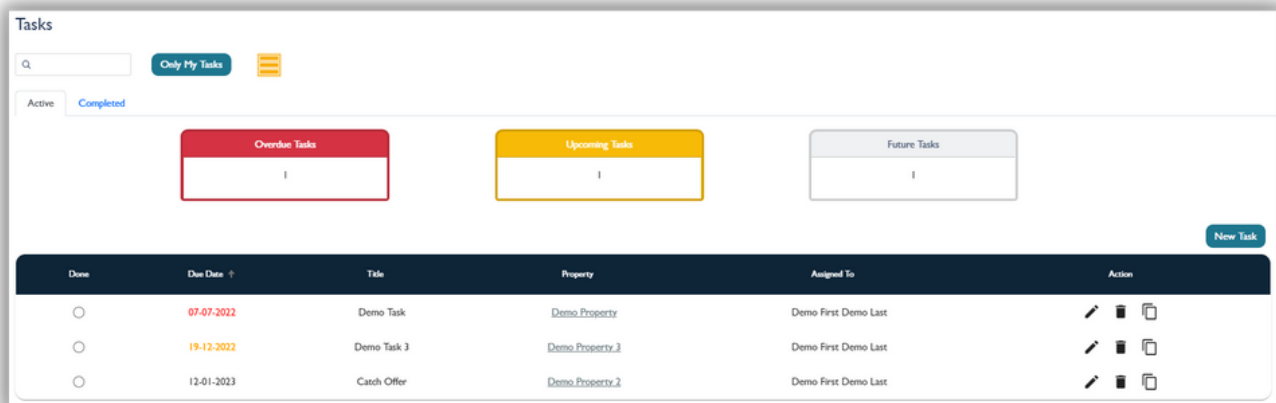
A screenshot of a web application interface for managing contacts. At the top left is a search bar with a magnifying glass icon. To its right is a button labeled "All Contacts" which is highlighted with a yellow border. Below the search bar are three tabs: "General", "Tenant", and "Prospective Tenant". On the right side of the interface is a "New Contact" button. Below these elements is a table with a dark header and one data row. The table columns are: Name, Company, Role, Email, Phone, and Action. The data row contains: "Demo Owned Contact", an empty cell, "Accountant", an empty cell, an empty cell, and two icons (a pencil and a trash can).

Name	Company	Role	Email	Phone	Action
Demo Owned Contact		Accountant			 



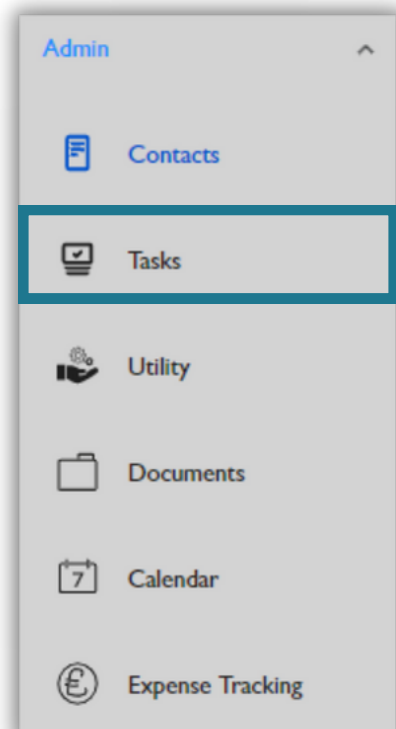
# TASKS

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.



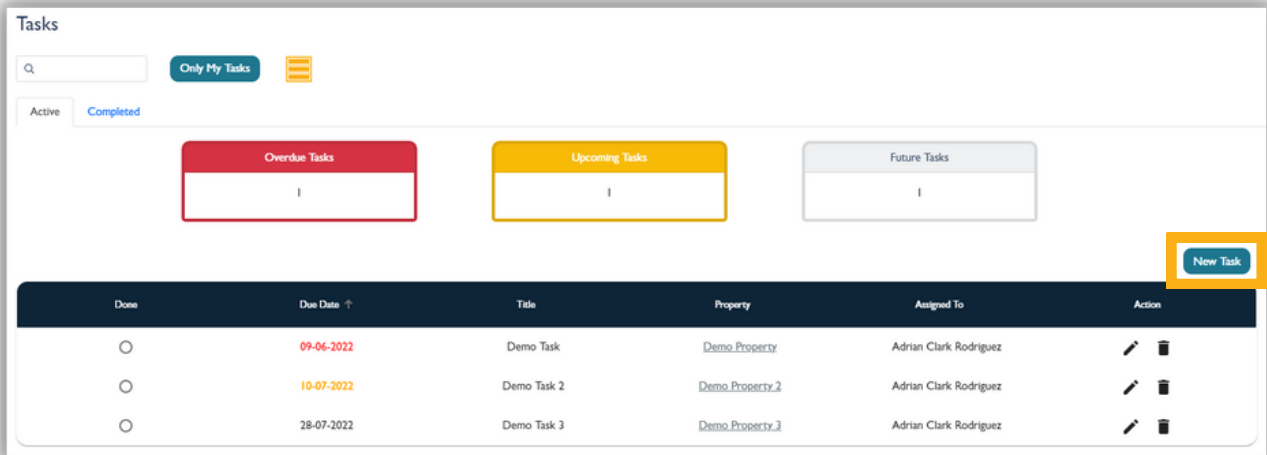
Done	Due Date	Title	Property	Assigned To	Action
<input type="radio"/>	07-07-2022	Demo Task	Demo_Property	Demo First Demo Last	
<input type="radio"/>	19-12-2022	Demo Task 3	Demo_Property_3	Demo First Demo Last	
<input type="radio"/>	12-01-2023	Catch Offer	Demo_Property_2	Demo First Demo Last	

TASKS can be found on the GRAY SIDEBAR under ADMIN.

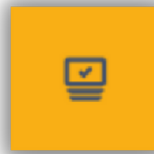


# CREATE TASKS

I. 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

Title \* ⓘ  
Demo Task

Reminders ⓘ  
1 Day Before Due Date

Recurring Task ⓘ  
Every Month

Recurring Due Date ⓘ  
1 Month after task creation

Associated With Property ⓘ  
Demo Property 2 x

Associated With User ⓘ  
Adrian Clark Rodriguez x

Associated With Contact ⓘ  
Demo Contact x

Notes ⓘ

Due Date \* ⓘ  
Choose a date  
27/07/2022

Create Task Cancel

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

Tasks

Only My Tasks

Active Completed

Overdue Tasks

Upcoming Tasks









Future Tasks

New Task

Done	Due Date ↑	Title	Property	Assigned To	Action
<input type="radio"/>	09-06-2022	Demo Task	Demo Property	Adrian Clark Rodriguez	
<input type="radio"/>	10-07-2022	Demo Task 2	Demo Property 2	Adrian Clark Rodriguez	
<input type="radio"/>	28-07-2022	Demo Task 3	Demo Property 3	Adrian Clark Rodriguez	

# EDIT TASKS

1. Click the Pencil Icon beside the chosen TASKS.

Done	Due Date ↑	Title	Property	Assigned To	Action
<input type="radio"/>	09-06-2022	Demo Task	<a href="#">Demo Property</a>	Adrian Clark Rodriguez	 
<input type="radio"/>	10-06-2022	Demo Task			 
<input type="radio"/>	10-07-2022	Demo Task 2	<a href="#">Demo Property 2</a>	Adrian Clark Rodriguez	 
<input type="radio"/>	28-07-2022	Demo Task 3	<a href="#">Demo Property 3</a>	Adrian Clark Rodriguez	 

2. Edit any of the Tabs below.

## General Tab

General

Notes

Title ⓘ

Reminder ⓘ

Status ⓘ

Recurring ⓘ

Due Date ⓘ

Assigned to ⓘ

Associated Deal ⓘ


Associated Contact ⓘ

Recurring Due Date ⓘ

## Notes Tab

General

Notes



Adrian Clark Rodriguez

Add a note

Pro tip: press **SHIFT + M** to add a note

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.

Done	Due Date ↑	Title	Property	Assigned To	Action
<input type="radio"/>	09-06-2022	Demo Task	<a href="#">Demo Property</a>	Adrian Clark Rodriguez	
<input type="radio"/>	10-07-2022	Demo Task 2	<a href="#">Demo Property 2</a>	Adrian Clark Rodriguez	
<input type="radio"/>	28-07-2022	Demo Task 3	<a href="#">Demo Property 3</a>	Adrian Clark Rodriguez	

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








Active	Completed					New Task
Done	Due Date ↑	Title	Property	Assigned To	Action	
<input checked="" type="radio"/>	10-06-2022	Demo Task				

## 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.

Done	Due Date ↑	Title	Property	Assigned To	Action
<input type="radio"/>	09-06-2022	Demo Task	<a href="#">Demo Property</a>	Adrian Clark Rodriguez	
<input type="radio"/>	10-07-2022	Demo Task 2	<a href="#">Demo Property 2</a>	Adrian Clark Rodriguez	
<input type="radio"/>	28-07-2022	Demo Task 3	<a href="#">Demo Property 3</a>	Adrian Clark Rodriguez	

### 3. Duplicate TASKS.

Title	Property	Assigned To	Action
Demo Task	<a href="#">Demo Property</a>	Demo First Demo Last	  
Demo Task 3	<a href="#">Demo Property 3</a>	Demo First Demo Last	  
Catch Offer	<a href="#">Demo Property 2</a>	Demo First Demo Last	  

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:

Title	Property	Assigned To	Action
Demo Task	<a href="#">Demo Property</a>	Demo First Demo Last	  
Demo Task 3	<a href="#">Demo Property 3</a>	Demo First Demo Last	  
Catch Offer	<a href="#">Demo Property 2</a>	Demo First Demo Last	  
Demo Task	<a href="#">Demo Property</a>	Demo First Demo Last	  

### 4. TASKS search function.

## Tasks

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.

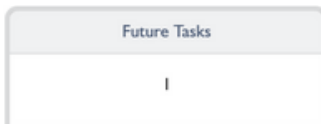
## 5. Status of your TASKS.



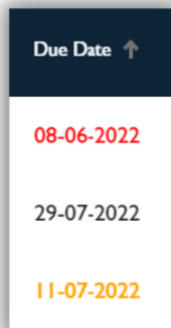
Tasks that are past their due date.



Tasks that are due within 7 days.

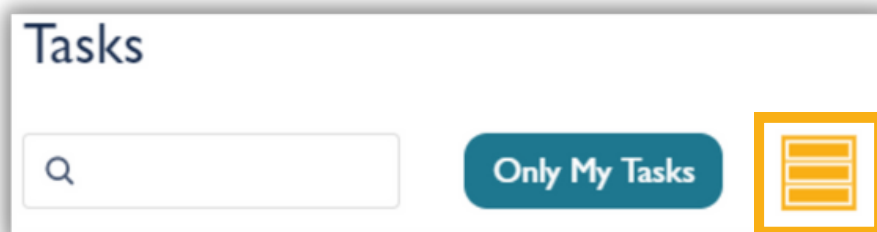


Tasks that are not due for the next 7 days.



Dates are color coded based on the categories above.

## 6. KANBAN View and LIST View

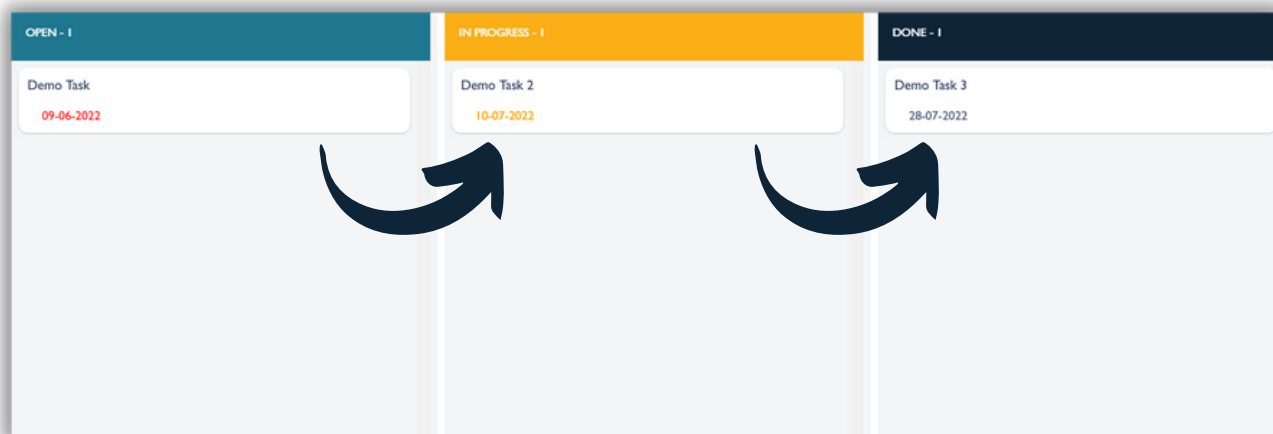


### LIST View



Done	Due Date ↑	Title	Property	Assigned To	Action
<input type="radio"/>	09-06-2022	Demo Task	<a href="#">Demo Property</a>	Adrian Clark Rodriguez	
<input type="radio"/>	10-07-2022	Demo Task 2	<a href="#">Demo Property 2</a>	Adrian Clark Rodriguez	
<input type="radio"/>	28-07-2022	Demo Task 3	<a href="#">Demo Property 3</a>	Adrian Clark Rodriguez	

### 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

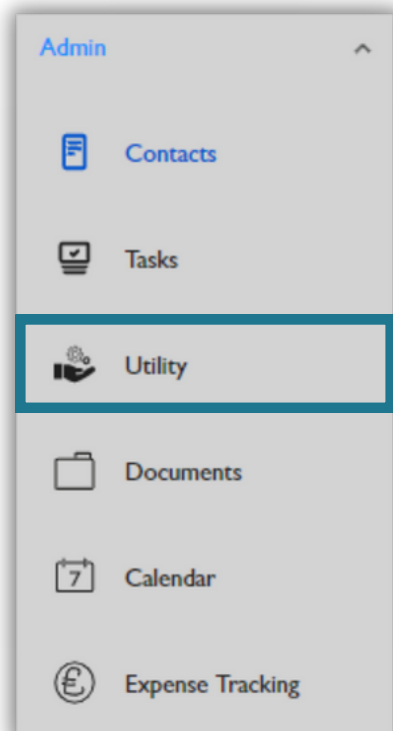
Have multiple properties and can't remember which bill is for which? The **UTILITY** hub was made for this exact problem. Track all your bills using our dedicated **UTILITY** tracking feature.

Utilities

New Utility

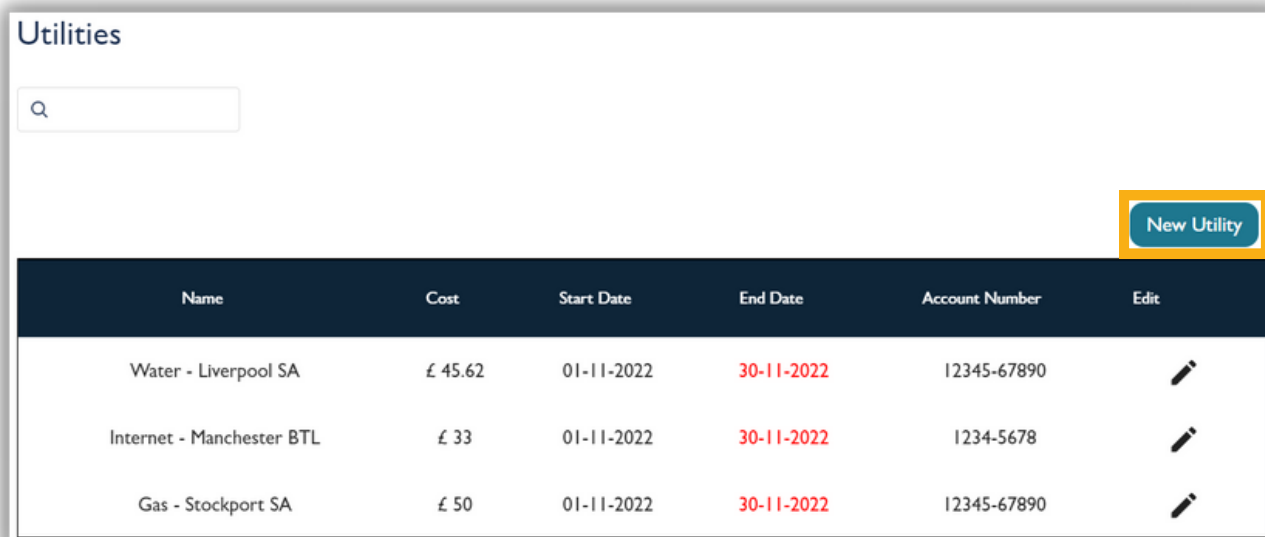
Name	Cost	Start Date	End Date	Account Number	Edit
Water - Liverpool SA	£ 45.62	01-11-2022	30-11-2022	12345-67890	
Internet - Manchester BTL	£ 33	01-11-2022	30-11-2022	1234-5678	
Gas - Stockport SA	£ 50	01-11-2022	30-11-2022	12345-67890	

**UTILITY** can be found on the **GRAY SIDEBAR** under **ADMIN**.

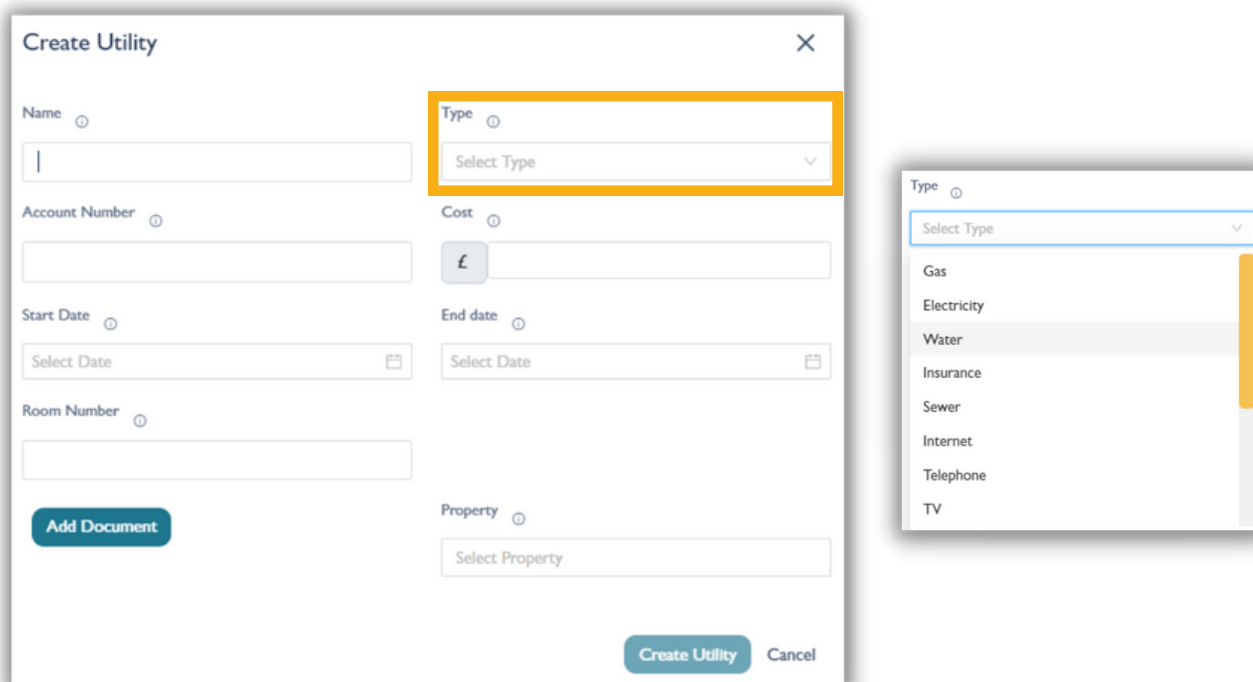


# CREATE UTILITY

## 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

The image shows a 'Create Utility' form with the following fields and options:

- Name**: Text input field.
- Type**: Dropdown menu with 'Electricity' selected.
- Add MPAN / MPRN**: Text input field.
- Meter Serial Number**: Text input field.
- Smart Meter**: Checkbox (unchecked).
- Cost Per Month**: Text input field with a '£' symbol.
- Standing Charge / Day**: Text input field with a '£' symbol and a dropdown arrow.
- Unit Price / Kwh Or Unit Price / Kwh**: Text input field with a '£' symbol.
- Reading**: Text input field with 'Meter Reading' placeholder.
- Meter Read Date**: Date selection field with 'Select Date' and a calendar icon.
- Account Number**: Text input field.
- Cost**: Text input field with a '£' symbol.
- Start Date**: Date selection field with 'Select Date' and a calendar icon.
- End date**: Date selection field with 'Select Date' and a calendar icon.
- Room Number**: Text input field.
- Property**: Text input field with 'Select Property' placeholder.

The 'Add Document' button is highlighted with a yellow box. At the bottom right, there are 'Create Utility' and 'Cancel' buttons.

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.

**Create Utility**

Name: Water - Liverpool SA

Type: Water

Reading: 64.73 - Thu Dec 15 2022

Meter Read Date: 2022-12-02

Account Number: 12345-67890

Cost: £ 50

Start Date: 2022-11-01

End Date: 2022-11-30

Room Number: 12

Property: Demo Property

**Create Utility** Cancel

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.

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	

2. Edit any of the Tabs below.

## General Tab

General

Notes

Name: Water - Liverpool SA

Cost: £ 45.62

Start Date: 2022-11-01

Reading: 52.89 - Thu Dec 15 2022

Room Number: 3

Document: [Add Document](#)

Type: Water

Account Number: 12345-67890

End Date: 2022-11-30

Meter Read Date: 2022-12-05

Note:

Property: 75, Doe Quarry Lane Dinnington SHEFFIELD

## Notes Tab

General

Notes

Demo First Demo Last

Add a note

Pro tip: press **SHIFT + M** to add a note

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.

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	

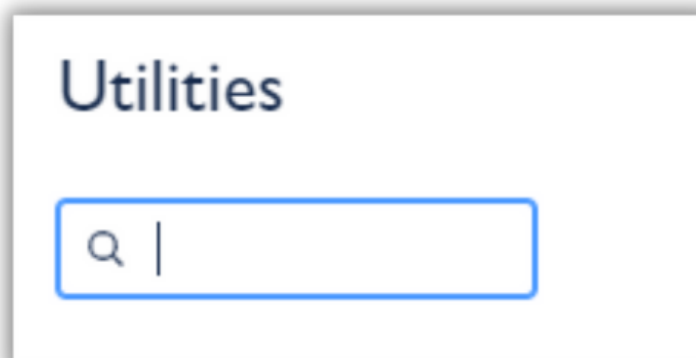
To find the archived tasks, simply go to the COMPLETED Tab.

Active Completed

[New Task](#)

Done	Due Date ↑	Title	Property	Assigned To	Action
<input type="checkbox"/>	10-06-2022	Demo Task			

## 2. UTILITY search function.



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

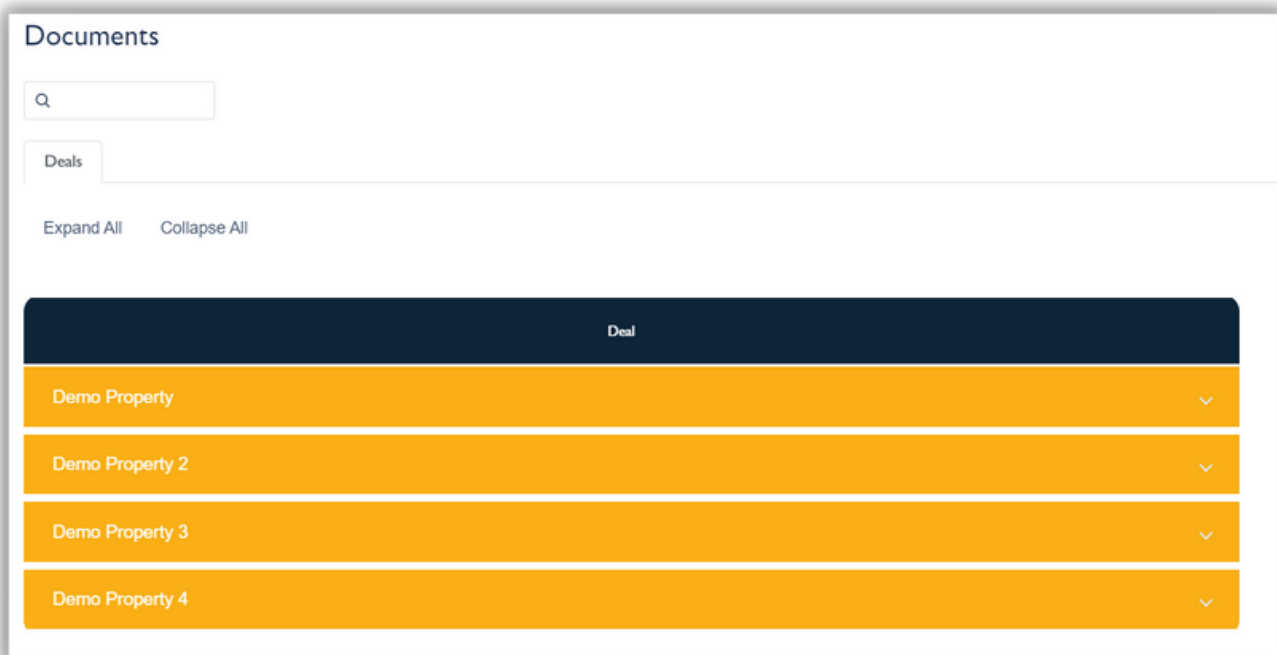
### 3. Assign UTILITIES to multiple properties.

General	Name	Gas - Stockport SA	Type	Gas
Notes	Cost	£ 50	Account Number	12345-67890
	Start Date	2022-11-01	End Date	2022-11-30
	Reading	Meter Reading	Meter Read Date	2022-12-15
	MPAN / MPRN		Meter Serial Number	101010
	Smart Meter	<input checked="" type="checkbox"/>	Cost Per Month	£ 50
	Standing Charge / Day	£	Unit Price / Kwh Or	£
	Room Number		Unit Price / Kwh	£
	Document	Add Document	Note	
			Property	Demo Property 1 x Demo Property 2 x Demo Property 3 x Demo Property 4 x

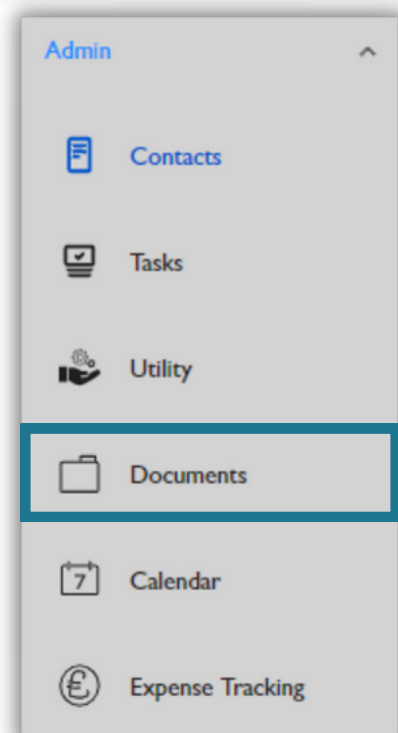
You can assign UTILITIES to multiple properties. Useful if you want to group all your electricity expenses together. Such as if you own multiple flats in the same building so that they are easier to track.

# 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**.



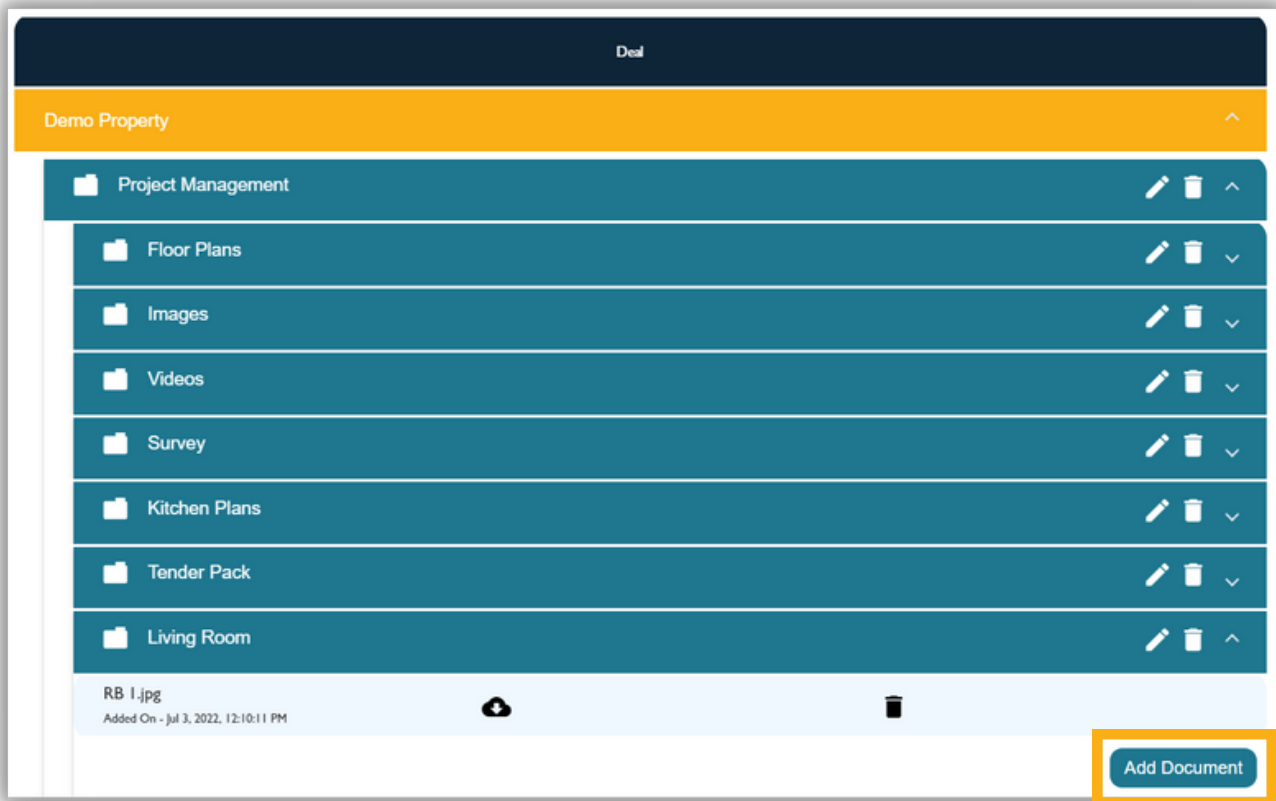


# UPLOAD DOCUMENTS

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.

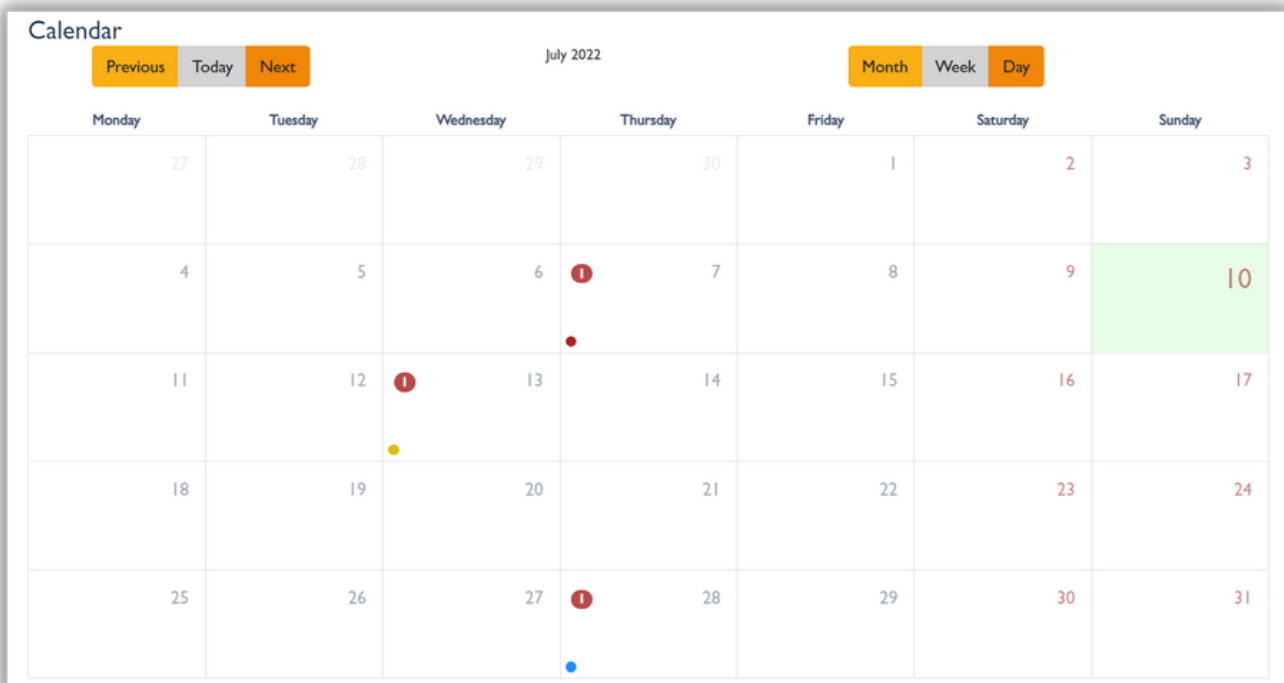


Download File

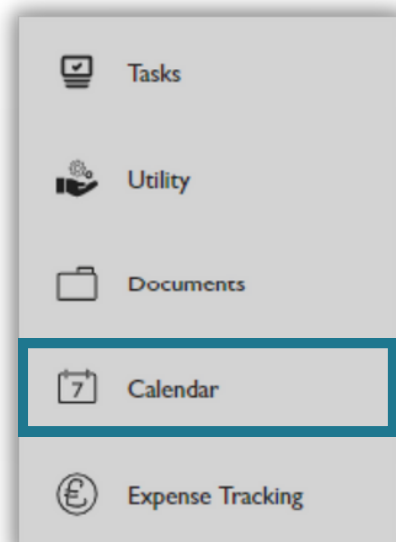
Click the Cloud Icon to download your uploaded files. With this, you can rest assured that any of your uploaded files can be accessed almost everywhere and anytime as long as you have internet access. You also won't be needing any third party app either as it is already a feature of Property Store.

# 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

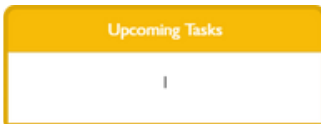
I. Created TASKS will show up on the CALENDAR.

27	28	29	30	1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	31

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.



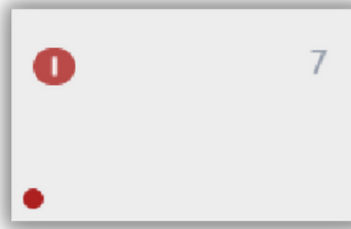
Tasks that are not due for the next 7 days.

RED dots are TASK past their due date.

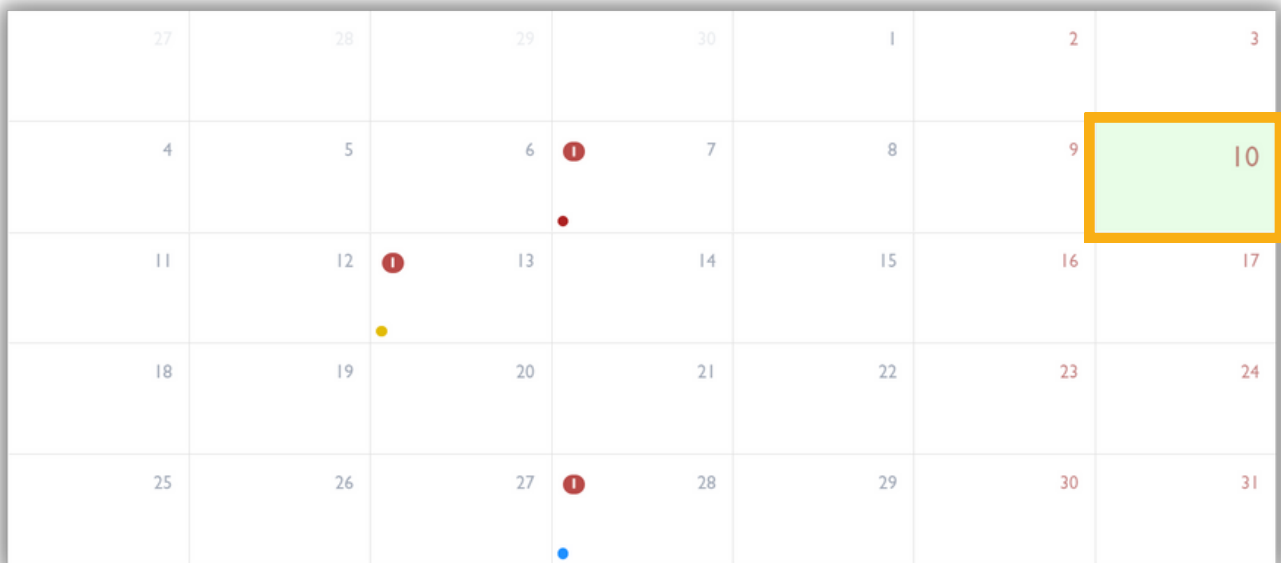
YELLOW dots are task that are due in 7 days.

BLUE dots are TASK that are not due for the next 7 days.

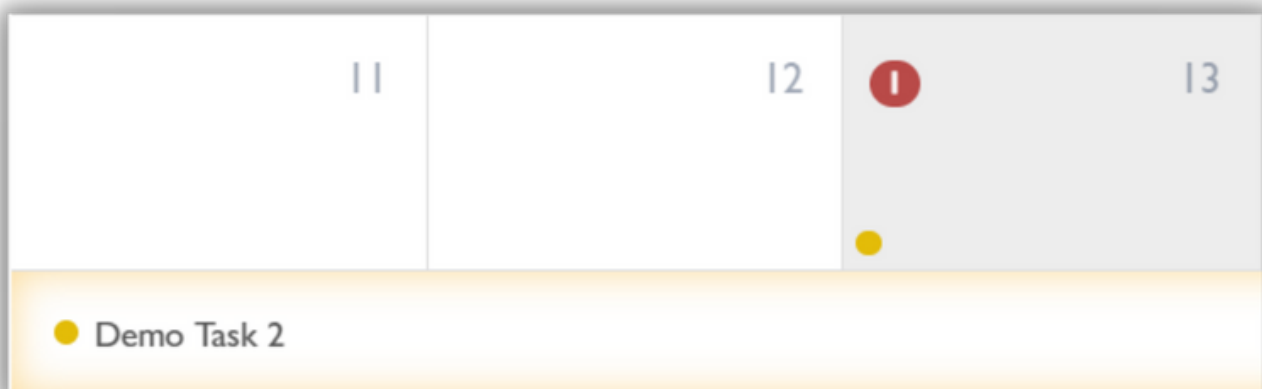
2. Number indicates the sum of TASK due that day.



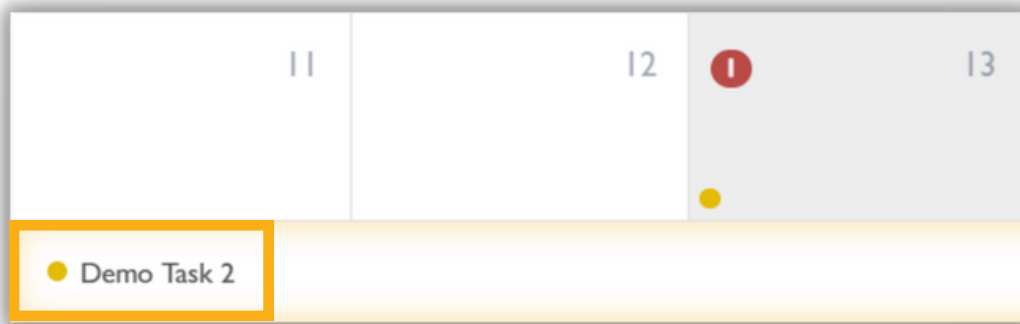
3. The current date is highlighted in green.



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.

A screenshot of a task details form. The form has a teal header with the task ID 'TASK-01034' on the left and 'Give Feedback' with a trash icon and a close button on the right. The form is divided into two tabs: 'General' and 'Notes'. The 'General' tab is active. The form contains several fields: 'Title' (Demo Task 2), 'Assigned to' (Adrian Clark Rodriguez), 'Reminder' (I Day Before Due Date), 'Associated Deal' (Demo Property 2), 'Status' (In Progress), 'Associated Contact' (Demo Contact), 'Recurring' (Every Month), and 'Recurring Due Date' (Select Recurring Task Options). The 'Due Date' field is set to 13/07/2022.

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

Calendar

Jul 10 - Jul 16, 2022

Previous Today Next Month Week Day

	Sunday Jul 10	Monday Jul 11	Tuesday Jul 12	Wednesday Jul 13	Thursday Jul 14	Friday Jul 15	Saturday Jul 16
				Demo Task 2			
12 AM							
1 AM							
2 AM							
3 AM							
4 AM							
5 AM							
6 AM							
7 AM							
8 AM							

## DAY View

Calendar

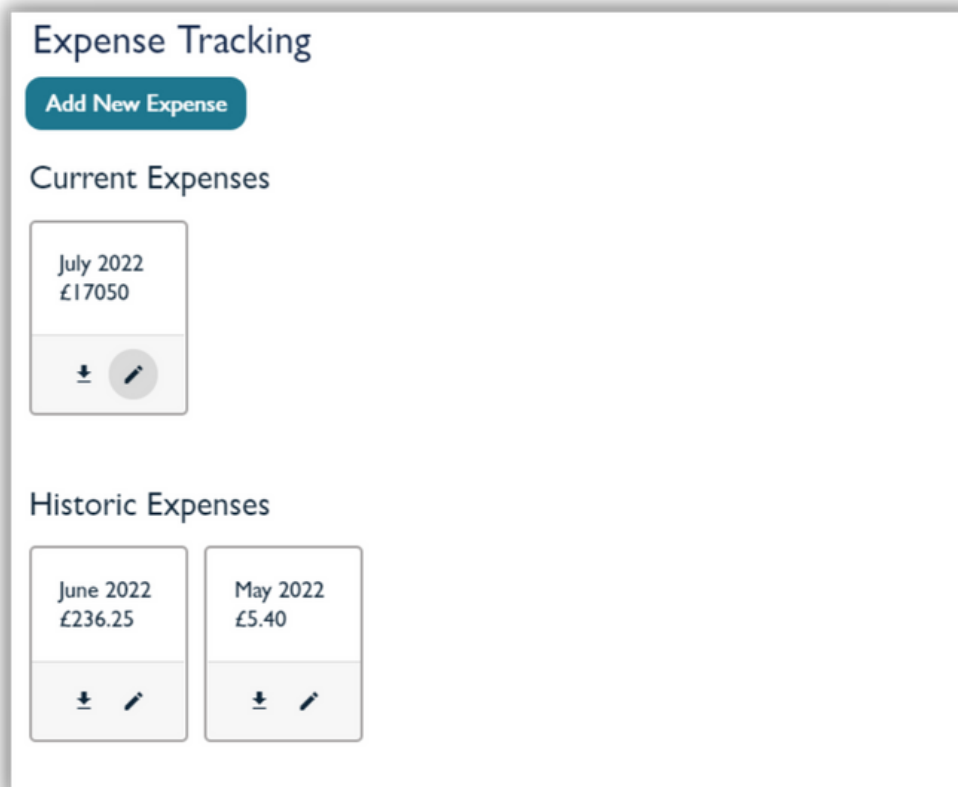
Tuesday, July 12, 2022

Previous Today Next Month Week Day

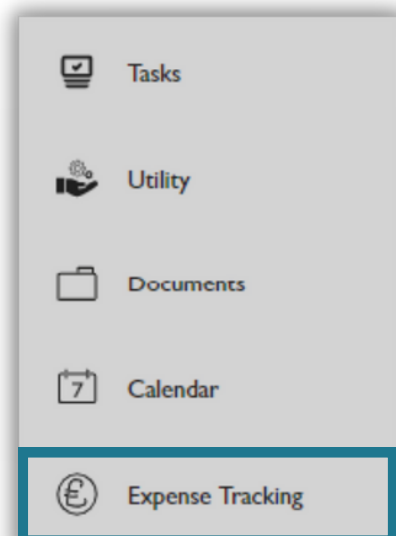
12 AM
1 AM
2 AM
3 AM
4 AM
5 AM
6 AM
7 AM
8 AM
9 AM

# 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.

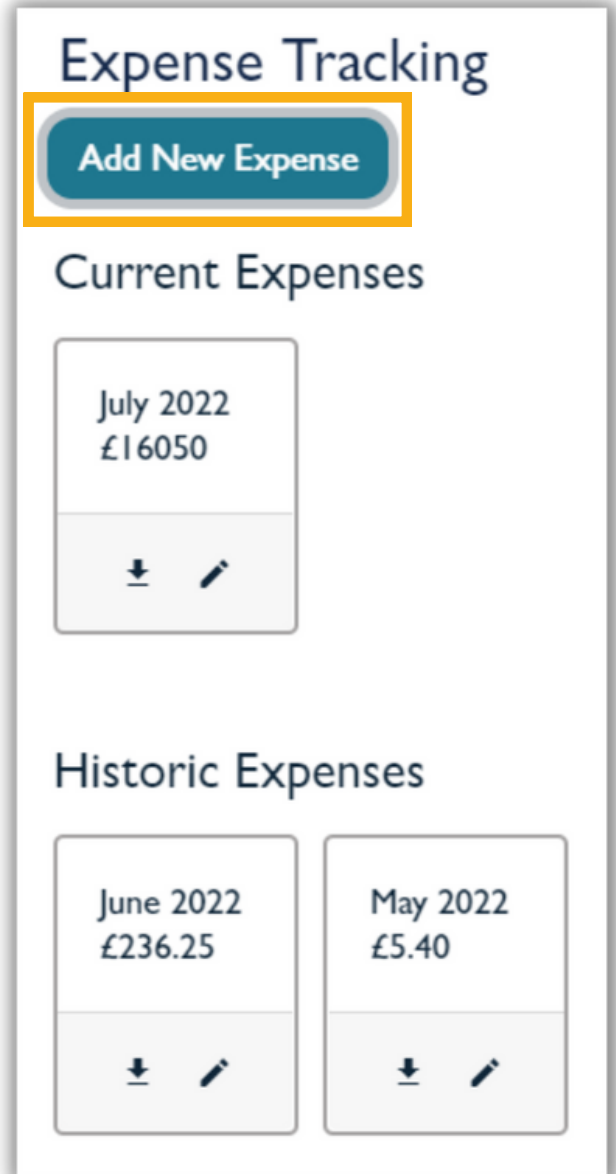
The Create Expense Form will pop up as upon clicking which is shown on Step 2.

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.

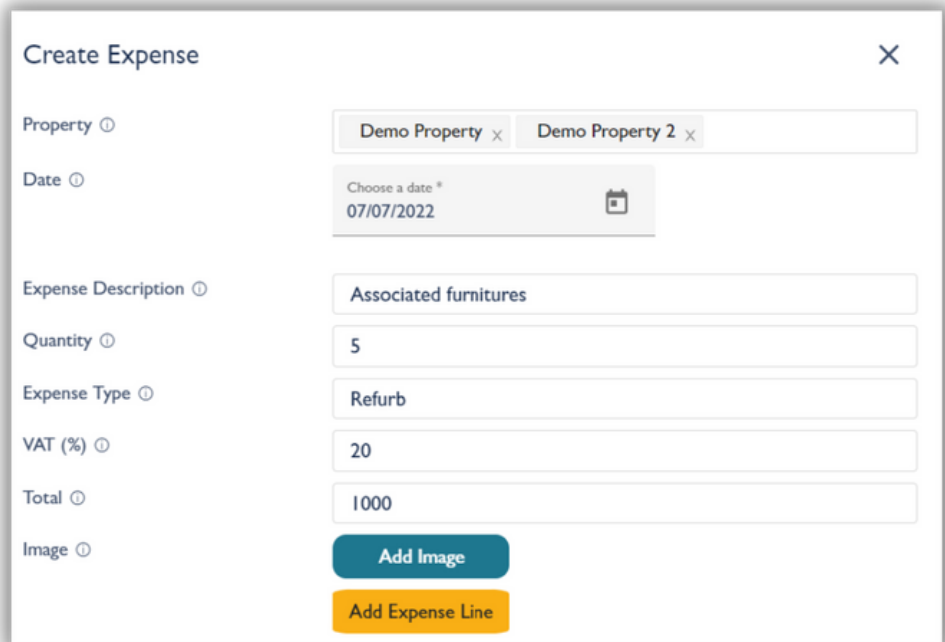
Click the Download icon to download your expenses into a pre-formatted spreadsheet and all the images you have uploaded here.



## 2. Fill in the CREATE EXPENSE form.

Associate expense to any property for tracking.

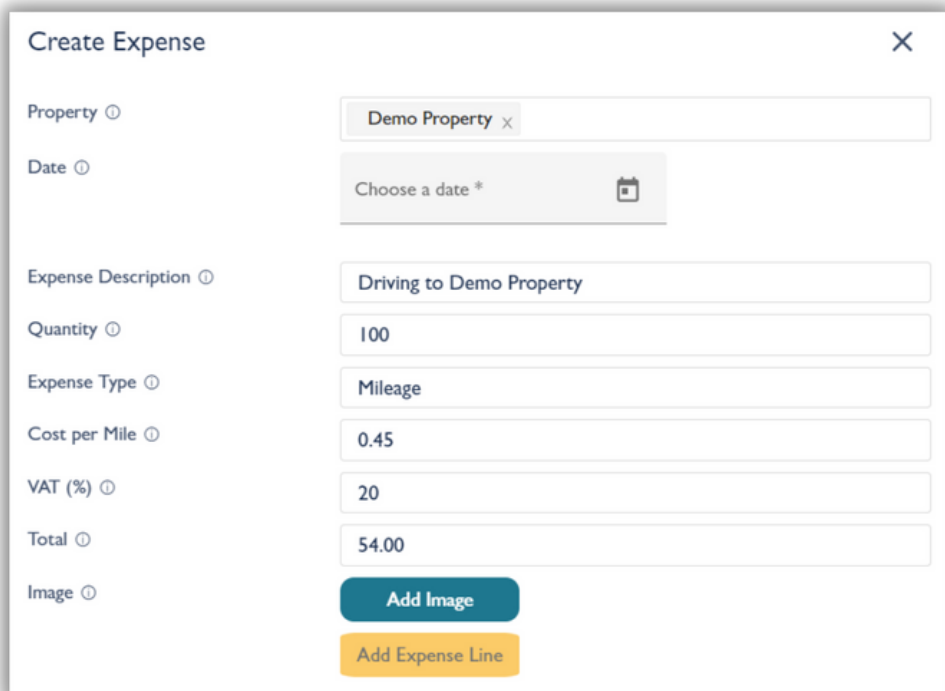
Click the "Add Image" button to upload any picture.



The screenshot shows the 'Create Expense' form with the following fields filled out:

- Property: Demo Property x Demo Property 2 x
- Date: 07/07/2022
- Expense Description: Associated furnitures
- Quantity: 5
- Expense Type: Refurb
- VAT (%): 20
- Total: 1000
- Image: Add Image button
- Bottom button: Add Expense Line

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



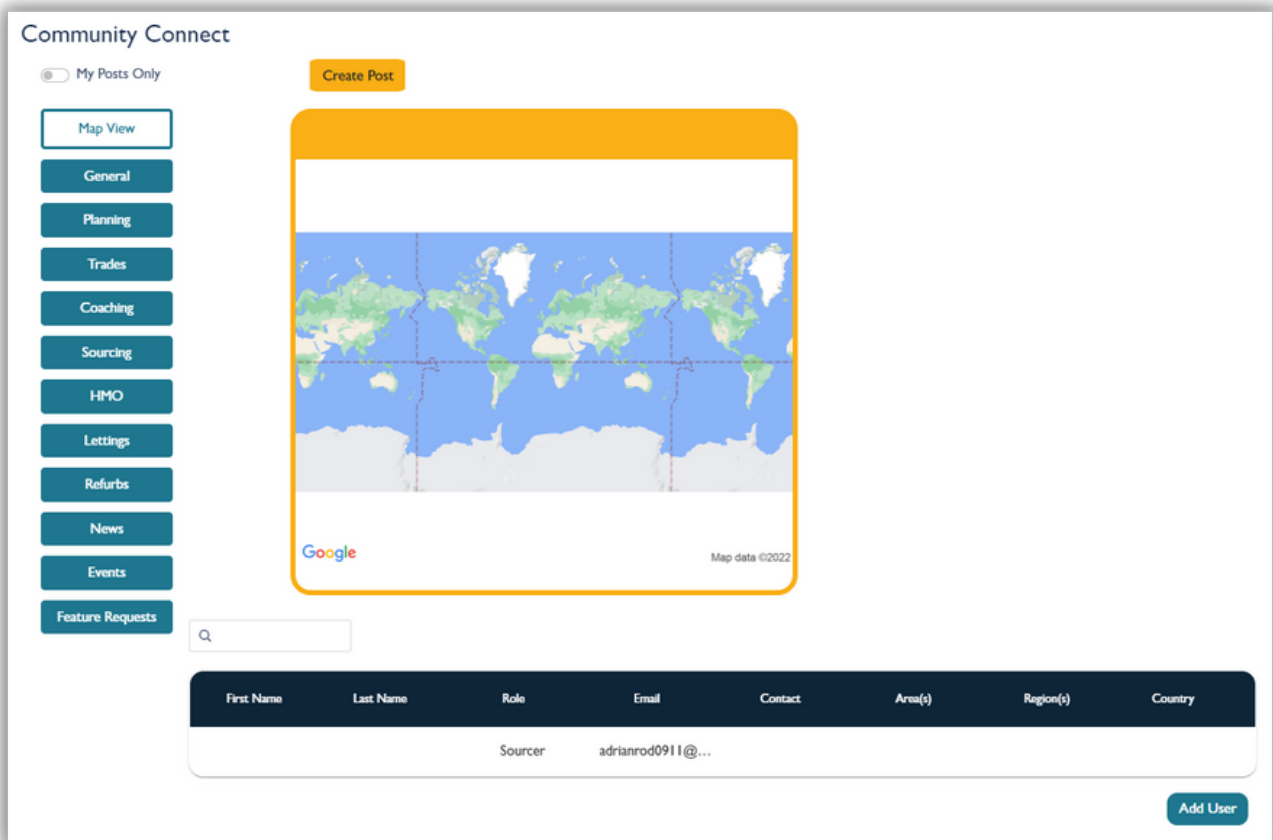
The screenshot shows the 'Create Expense' form with the following fields filled out:

- Property: Demo Property x
- Date: Choose a date \*
- Expense Description: Driving to Demo Property
- Quantity: 100
- Expense Type: Mileage
- Cost per Mile: 0.45
- VAT (%): 20
- Total: 54.00
- Image: Add Image button
- Bottom button: Add Expense Line

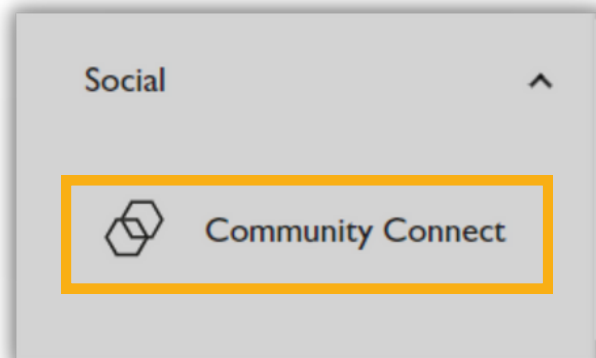
Click the "Add Expense Line" button once you're done with the details to save and include the Expense.

# 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

## I. 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 screenshot displays a vertical list of community posts in the "General Channel". On the left, a sidebar contains navigation buttons for "Map View", "General", "Planning", "Trades", "Coaching", "Sourcing", "HMO", "Lettings", "Refurbs", "News", "Events", and "Feature Requests". The main content area shows five posts:

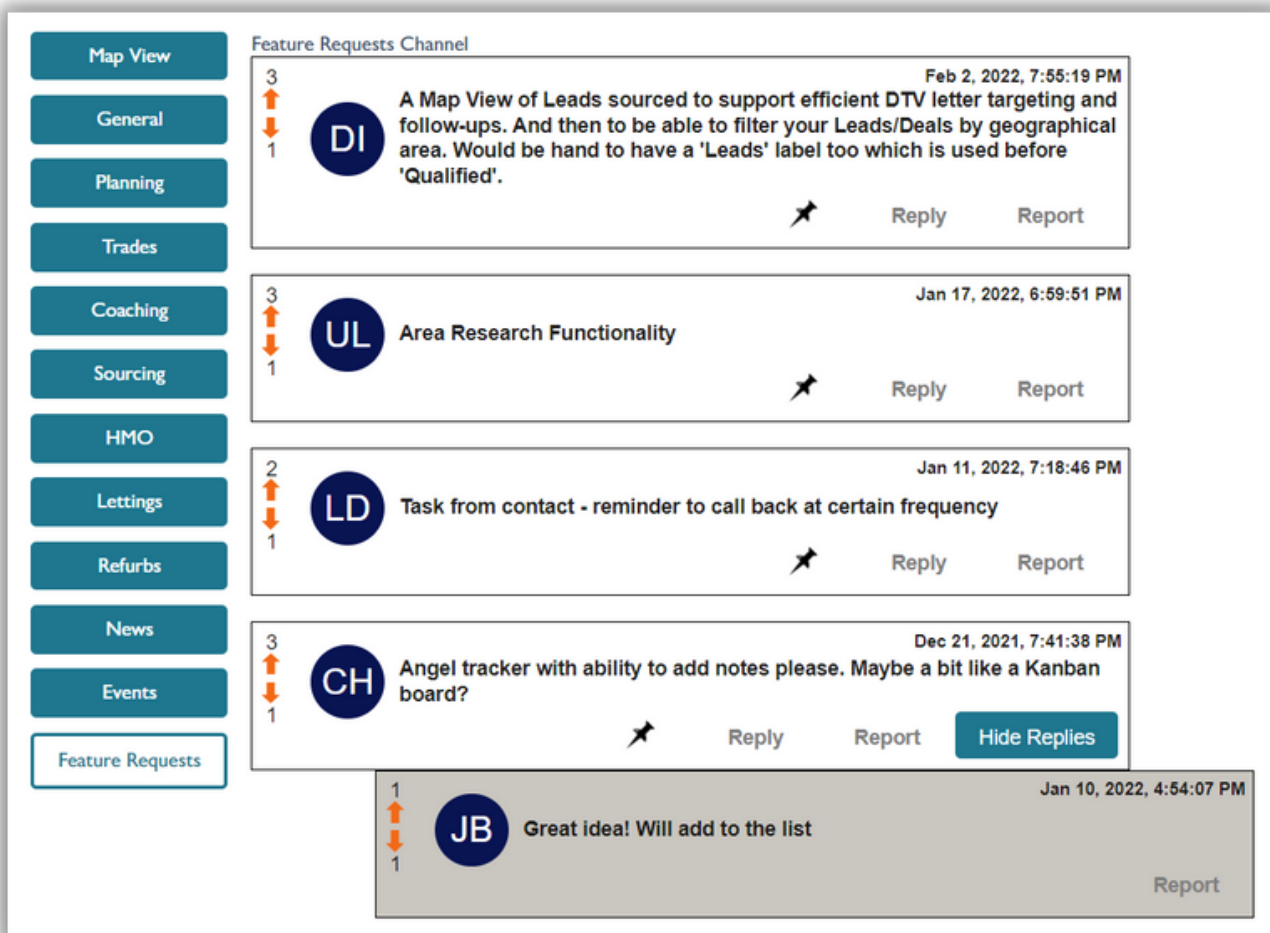
- Post 1:** User JP, Feb 15, 2022, 11:17:32 PM. Text: "Hi everyone. We're just getting to grips with Property Store. We're trying to import our Contacts list from Excel. What is the first column in the Contact import template (S.No) please?". Interactions: 2 upvotes, 2 downvotes, Pin icon, Reply, Report.
- Post 2:** User NR, Nov 16, 2021, 8:55:58 PM. Text: "Hi Jake loving the platform! With the investment calculator is there anyway you can add a section for flips? \*edit I think a lot of investors have a capital and income mixed strategy so flip calculator and category option would be priority to make this a". Interactions: 4 upvotes, 1 downvote, Pin icon, Reply, Report, Hide Replies button.
- Post 3:** User JB, Nov 19, 2021, 4:28:00 PM. Text: "Great idea! It's in development and will be released in our next major update scheduled for 3rd January. Thanks!". Interactions: 1 upvote, 1 downvote, Report button.
- Post 4:** User SC, Nov 8, 2021, 12:18:49 AM. Text: "Hi Folks, great platform :) I am struggling to save a note to a property it doesnt save when selected the save option. Thanks". Interactions: 2 upvotes, 1 downvote, Pin icon, Reply, Report, Show Replies button.
- Post 5:** User CP, Nov 5, 2021, 4:50:57 AM. Text: "Hi Jake, just having a play around adding my existing properties in that I already own but going through the process of adding them with all costs and offers etc. I can't see how to move the property from the sourcing pipeline to my portfolio (lettings?)". Interactions: 5 upvotes, 1 downvote, Pin icon, Reply, Report, Show Replies button.

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.

This is a close-up view of the first post from the screenshot above. It shows the user avatar "JP", the timestamp "Feb 15, 2022, 11:17:32 PM", the text of the post, and the interaction options: 2 upvotes, 2 downvotes, a pin icon, and buttons for "Reply" and "Report".

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.

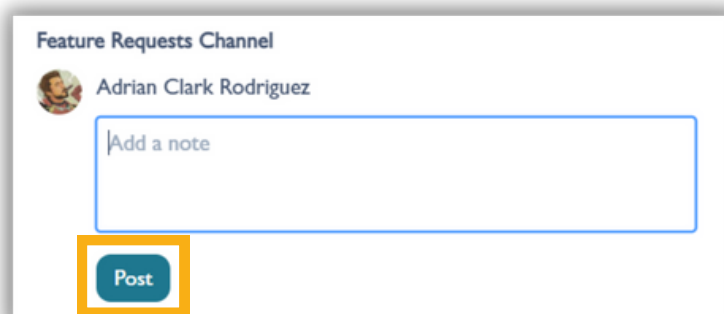
### 3. Community Channels - Feature Requests.



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.

The screenshot displays the 'Coaching' interface. At the top, it says 'Coaching' and 'Set working hours:'. Below this, there are input fields for each day of the week (Monday through Sunday) to set working hours in HH:MM format. An 'Update' button is located below the input fields. Underneath, there is a search bar labeled 'My Students' with a magnifying glass icon. Below the search bar is a table with the following data:

Name	Role	Email	Edit
Demo Student	Student	student@demo.com	
Demo Student 2	Student	student2@demo.com	

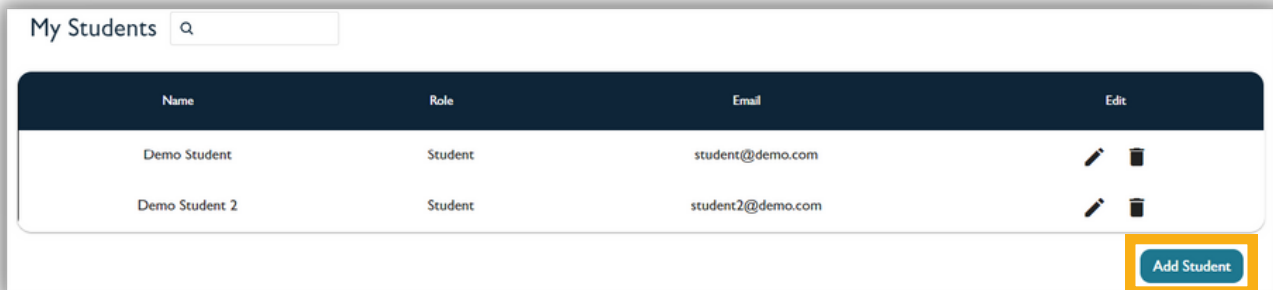
An 'Add Student' button is located at the bottom right of the table area.

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

The screenshot shows a gray sidebar menu. At the top, it says 'Coaching' with an upward arrow icon. Below this, there are two menu items: 'Coach' with a lightbulb icon and 'Student' with a graduation cap icon. The 'Coach' item is highlighted with a yellow border.

# ADD STUDENTS

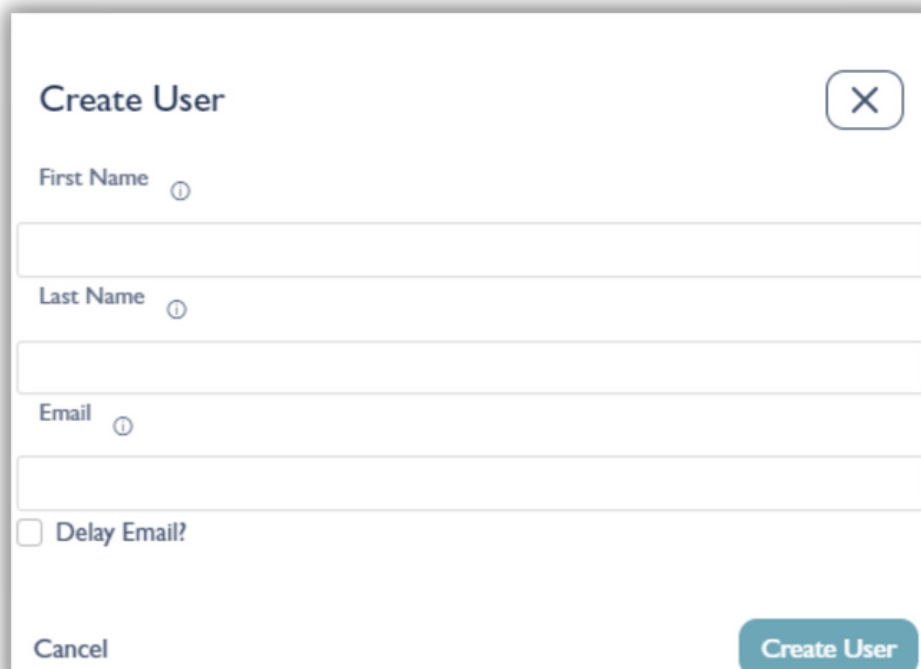
## 1. Click the "Add Student" button.



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).



The screenshot shows a "Create User" modal form. It has a close button (X) in the top right corner. The form contains the following fields and options:

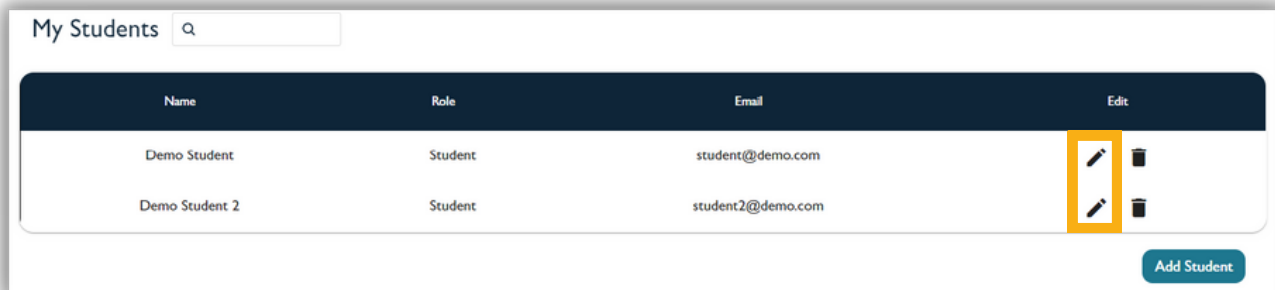
- First Name
- Last Name
- Email
- Delay Email?
- Cancel button
- Create User button





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.

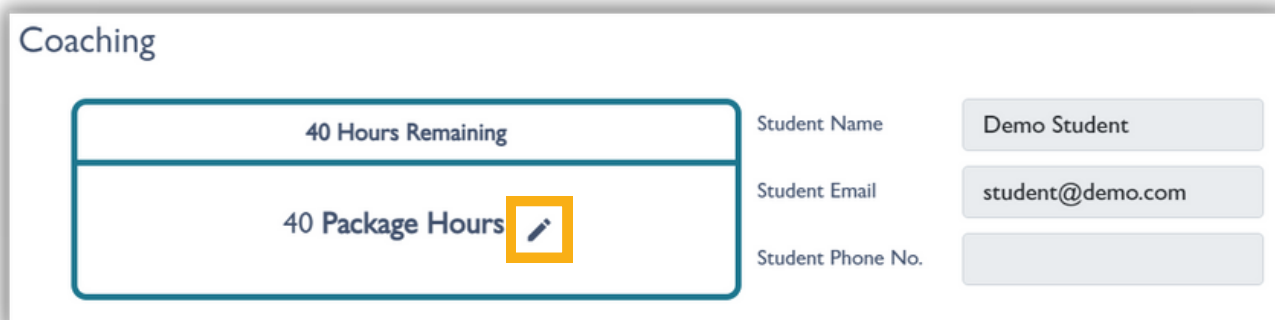
Once your student is on the list, click the Pencil Icon beside their details as shown below:



Name	Role	Email	Edit
Demo Student	Student	student@demo.com	 
Demo Student 2	Student	student2@demo.com	 

[Add Student](#)


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



Coaching

40 Hours Remaining

---

40 Package Hours 

Student Name:

Student Email:

Student Phone No.:

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

## I. Set up the training plan for your student.

Below is an imaginary training plan for an imaginary student:

The screenshot shows a 'Coaching' interface. At the top left, there are two boxes: '37 Hours Remaining' and '40 Package Hours' with an edit icon. To the right, there are input fields for 'Student Name' (filled with 'Demo Student'), 'Student Email' (filled with 'student@demo.com'), and 'Student Phone No.' (empty). Below this is a tabbed menu with 'Upcoming Sessions' selected. A table lists sessions with columns: Done, Upcoming Sessions, Date, Duration (Hrs), and Action. The 'Duration (Hrs)' column is highlighted with a yellow box. Below the table is a form to add a new session with fields for 'Session Name' and 'Session Duration', and an 'Add Session' button.

Done	Upcoming Sessions	Date	Duration (Hrs)	Action
<input type="checkbox"/>	Training 1	23-07-2022	1	
<input type="checkbox"/>	Training 2	29-07-2022	2	

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.

### Coaching

37 Hours Remaining





40 Package Hours 

Student Name: Demo Student

Student Email: student@demo.com







Student Phone No.:

Upcoming Sessions | Previous Sessions | Documents | Homework | Notes

Done	Upcoming Sessions	Date	Duration (Hrs)	Action
<input type="checkbox"/>	Training 1	23-07-2022	1	 
<input type="checkbox"/>	Training 2	29-07-2022	2	 

Session Name      Session Duration      [Add Session](#)

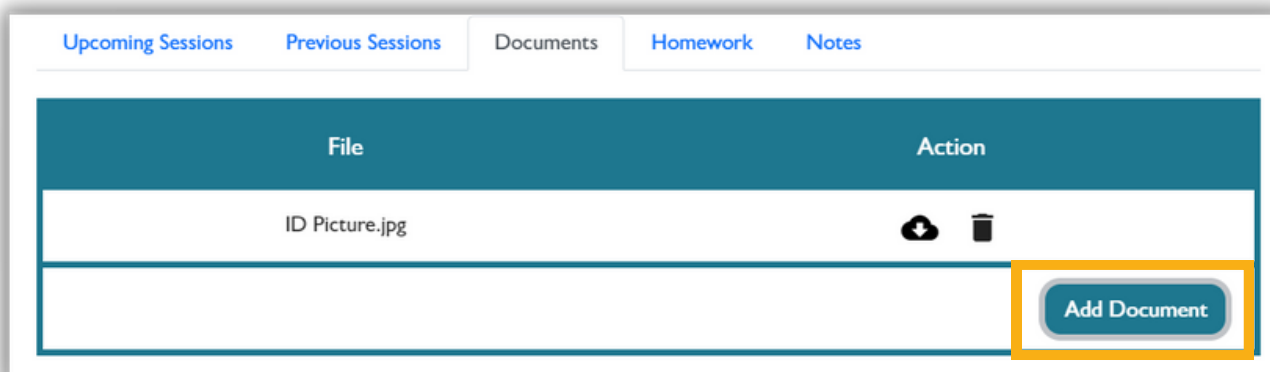
Below is what it looks like in the Previous Session Tab:

Previous Sessions	Date	Duration (Hrs)	Notes	Action
Finished Session	06-07-2022	1		 
Finished Session 2	09-09-2022	3		 

### 3. Upload files for your students or for you.

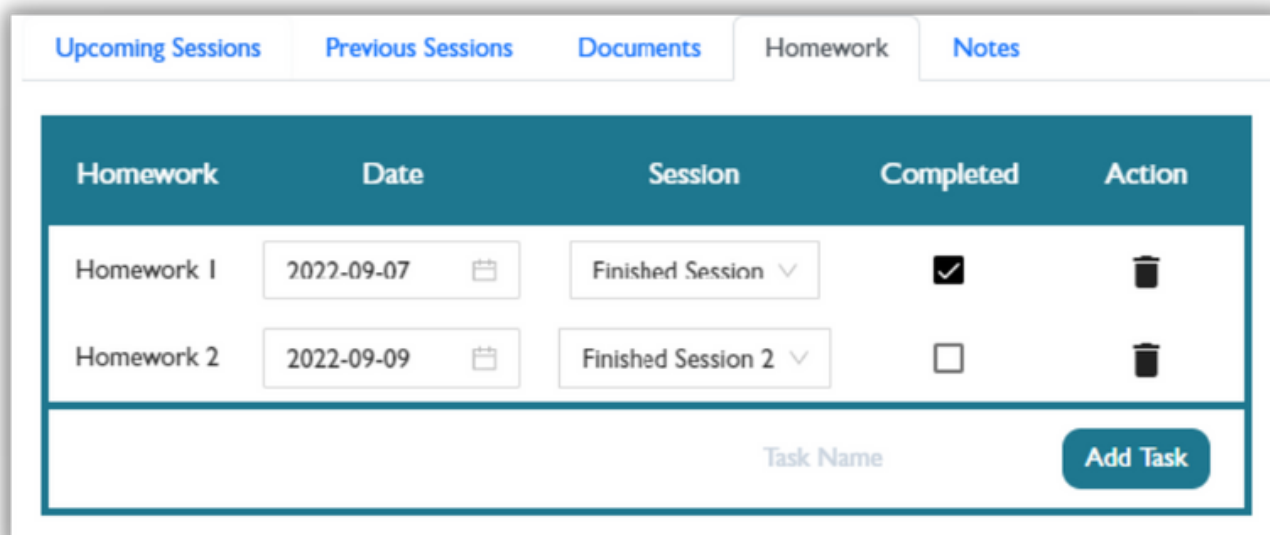
You can upload files for your students. It may be a copy of the teaching plan, a cheat sheet, or an assessment form. Whatever it maybe, you can use the Documents Tab for that. Students may upload their own documents too. Such as uploading an assessment form once its completed for you to check.

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



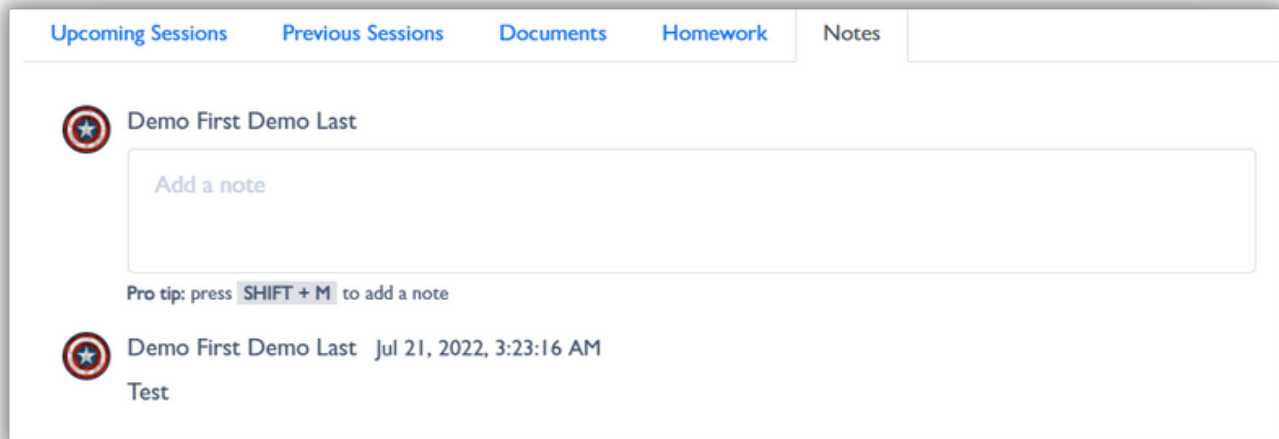
Similar to the DOCUMENTS Feature of Property Store, you may use the Download Icon to download the uploaded files.

### 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.

