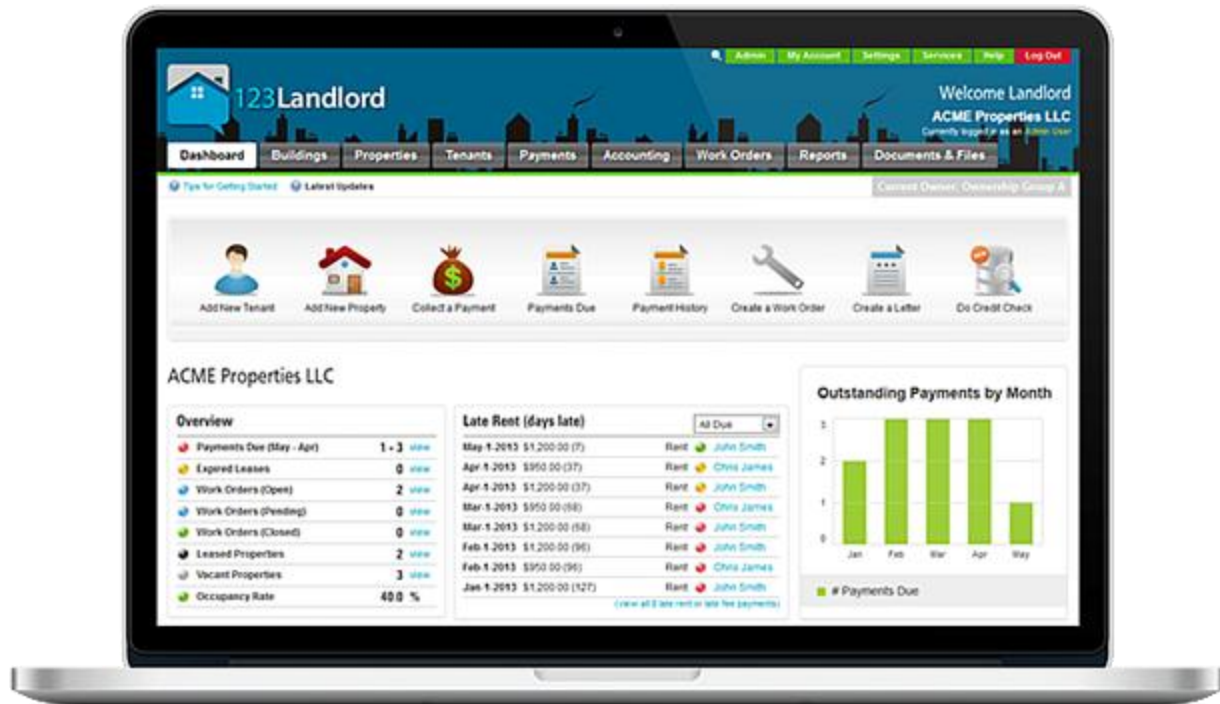




123Landlord

123Landlord.com

User Manual



123LANDLORD.COM

User Manual

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1. Getting Started

This section will help you sign up for a 123Landlord account, log into the system, and help you with usernames and passwords.

123Landlord is completely web-based, which means there is no software to install on your system. All you need is a modern web browser and an internet connection. 123Landlord has been tested and will work fine with Windows, Apple, or Linux-based computers, on Internet Explorer 8, 9, and 10, Firefox, Safari, and Google Chrome. Other browsers may also be compatible as well. 123Landlord will also work on tablets and smart phones (using the built in browser and either a WiFi connection, or using your cellular network).

Signing Up for 123Landlord

The first thing you'll need to do to start working with 123Landlord is to sign up for an account.

123Landlord is available in a variety of plans, ranging from the free basic plan to the various paid plans which offer different limitations with regard to the number of properties, tenants, and users that you can store.

To select a plan and sign up, visit www.123landlord.com and click **Sign Up**. Choose the plan right for you and enter your account information into the online form. You should choose a Username and a Password for your new account. These will be linked to the owner of the account who will be the contact point for all billing correspondence. Only this user will have access to the Billing tab inside the system.

Pricing Plan (* indicates required information)

Still not sure? [Try the free Basic account](#)

Plan: Professional \$13/mo *

I am: purchasing a new account

Username & Password

Username: *

Password: *

Repeat Password: *

Note

If you're purchasing a new account, specify the desired username and password for the account.

If you're upgrading an existing plan (**including the free Basic one**) to a new plan, enter the username and password for your current account. You cannot downgrade plans at this time.

Next

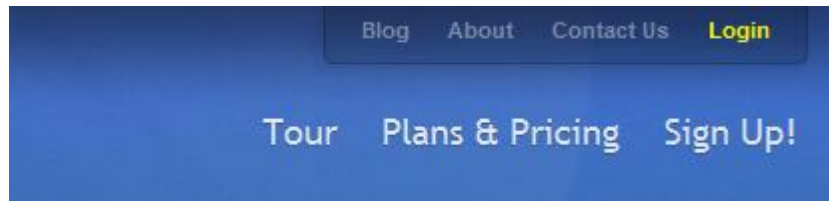
Click **Next** and (if you've selected a paid plan) enter your credit card information.

Once your payment has been processed and your account has been setup, you can log in.

Logging into the System

Logging into the system is accessed from the Login button on the main 123Landlord website, or directly through this URL:

<http://app.123landlord.com/Login.aspx> – you can bookmark this address for easy access.



Enter your Username and Password into the appropriate fields and click **Log In**.

A login form for 123Landlord. At the top left is a logo featuring a blue house icon with a white window and the text '123Landlord' in white. The background of the form area is a dark blue city skyline. In the center, there is a white box containing the following fields: 'Username:' followed by a text input field, 'Password:' followed by a text input field, and a 'Log In' button below them. Below the white box, there is a line of text: 'Enter your account info and click 'Log In'.'. At the bottom of the form, there is a dark blue bar containing a checked checkbox labeled 'Remember me for next time', and two links: 'Send username reminder' and 'Change my password'.

If you'd like to avoid entering your login information each time you sign in, you can check the **Remember me for next time** box and the system will remember your username and password. You should refrain from doing this on public computers – only utilize this on computers you use regularly and you trust, either at home or at work

Resetting Your Own Password

If you've forgotten your password, you can reset it. To do so, go to the Login page at <http://app.123landlord.com/Login.aspx> and click the **Change my password** link (this is also accessible here: <http://app.123landlord.com/ResetPassword.aspx>)

Enter your Username and the **New Password** – click **Change Password** to initiate the change password process.

For security purposes, we do not store your password in a retrievable form – our support staff is not able to view your password or retrieve it for you. The password can only be reset.

Also for increased security, the password reset is a two-step process. Once you click **Change Password**, you are sent an email to confirm the change. This is sent to the email address associated with the username you enter.

The ‘Password Reset Request’ email contains a link that you must click to confirm the change. It is only then that the password will be changed permanently.

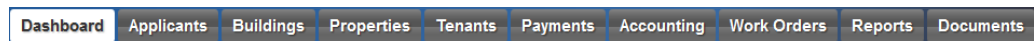
If you receive an email message similar to the above that you did **not** initiate using the Change Password screen, let us know as soon as possible and we will investigate.

Forgotten Username Reminder

If you’ve forgotten your username, you can have it emailed to you – go to the Login page at <http://app.123landlord.com/Login.aspx> and enter your **Email Address** into the Username field. Click **Send username reminder** and you will receive an email which contains your Username.

Main Application Toolbar

For the purposes of the manual, any references to the “Main Toolbar” mean the main program tab bar that looks like this:



2. Account Setup

Before you add properties and tenants to the system, your account might require some preliminary setup. This chapter covers topics such as Admin features, account configuration, and system settings.

Most of the day-to-day work in 123Landlord will involve adding and updating tenant and property data, collecting payments, and running reports. When you first sign up for 123Landlord services, however, you should take the time to set up the system according to how you work.

Important: *if you are a property manager that manages properties and tenants for other owners, you should probably create Owner records in the system before you start entering your properties, tenants, and leases. This is especially important if you want to be able keep owner data separate, run reports for a single owner, or allow owners the ability to log in and see their data. See the [Owner/Vendors tab](#) for more information.*

There are a variety of screens and pages that are designed to allow you to customize and personalize the system. Many of these functions are accessible only to Admin users.

First User Privileges (Account Owner/Admin)

By design, the first user created when you signed up for 123Landlord is the **account owner**. The account owner has the ability to access and manage things specific to the account (eg. the **Billing tab** on the [My Account](#) page). You cannot change the account owner user, nor grant these permissions to any other user.

The first user created on signup is also the first **admin user**, which means he or she has the ability to access settings and features on the **Admin page**.

Admin Page

Admin users have access to all tabs on the **Admin page**. The Admin page is accessed by the **Admin** button at the top-right corner of most pages.

If the current user is not an Admin user, he or she will not see the Admin button.



The Admin page consists of the following tabs:

Users tab

You can add additional users to 123Landlord to allow employees or other staff to log in and do work in the system. User accounts are also useful to allow Owners the ability to log in and view only their data.

Users						Add New
Add, remove, and edit users on this account						
First Name	Last Name	Username	Role	Tel	Email	
Jim	Beason	jimbeason	Viewer User		none@none.com	Edit ✕
Chris	Jackson	cjackson	Viewer User		cjackson@hotmail.com	Edit ✕
John	Smith	jsmith	Admin User	403 555 1212	jsmit@gmail.com	Edit

Create a User

1. Click the **Add New** button to add a new user. The **User Information** screen appears:

User Information General Restrictions

Username Initial Password Email Address
Leave blank to assign random password

First Name Last Name Address 1

Address 2 City State

Post Code Telephone Cellular

User Role Restricted To Specific Owner Data

2. Enter the user's First, Last Name, Username, Initial Password, and an Email Address. Enter other appropriate information and click **Save**. You can choose to leave the Initial Password empty – in this case a random password will be generated by the system.

When a user is created, a welcome email is sent which contains some basic info about 123Landlord.

Editing/Deleting Users

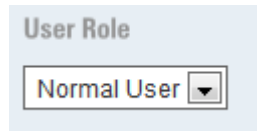
To edit existing users, click the **Edit** button. The **User Information** screen appears where you can modify the information for the user. Click **Save** to re-save the user. To delete owners, click the **Delete** button for the record you want to delete. Click OK to confirm. Deletes are permanent and cannot be undone.

User Roles

Various user permission levels are available in 123Landlord to allow you to control how your users can interact with your data:

- Normal User: normal users can view, edit, and delete all data – no admin access.
- Editor User: all data is viewable and editable, but no deletes allowed and no admin access.
- Viewer User: all data is visible, with no changes or deletes allowed and no admin access.
- Admin User: admin users can do everything normal users can do, plus add & edit other users in the system, and access everything else on the Admin page.

You specify the user's role on the **User Role** dropdown of the **User Information** screen:



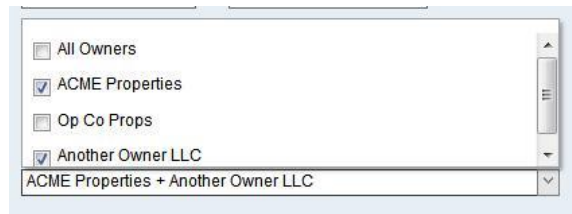
Owner Access

If you manage properties for other owners, you might want those owners to be able to log into 123Landlord and view their data. You can create a user for each owner that needs access, and you can specify their user role, depending on how much access you want your owner to have (read-only, edit, delete, etc.)

Link a User To Specific Owners

123 Landlord provides functionality to allow a user to manage data for specific owners. To do this, first make sure the owners are already created in the system - see the [Owners/Vendors tab](#):

1. Create a new user.
2. Set the proper 'User Role'
3. Select specific owners in the 'Restricted to Specific Owners' drop-down list:



4. If there are screens/modules/reports this user should **not** have access to, click the 'Restrictions' tab and select these areas of the system.
5. Click 'Save' when you are done. Now, when the user is logged in, they have access to the assigned owners. The user can toggle between the owners that have been assigned to him/her:



This is also useful to allow your owners to see their data and be restricted to only their data. For more information about this, see [Owners/Vendors tab](#).

Resetting Other Users' Passwords

To reset an existing user's password, click **Edit** to open the user screen for editing. Click the **Reset Password** link. In the **New Password** field enter the new password and click **Set** to save. Note: in this case, no email is sent to the user to notify them of this change – it is up to you to inform the user.

Owners/Vendors tab

You can create **Owners** to represent the owners of your properties. If you manage property for other owners (either other companies or individuals), it is especially important to keep track of which properties belong to which owners in 123Landlord.

If you own all of the properties you are managing in 123Landlord, this area of the system might not be applicable to you. Nevertheless, owners are a good way to separate properties into groups that allow you to keep data entry and reporting separate. You can then switch between owners using the **Current Owner** button. For more information about the current owner, see [Current Owner](#).

Creating an Owner

Click the **Add New** button to create a new owner. The **Owner Information** screen appears:

The screenshot shows the 'Owner Information' window with two tabs: 'Basic' (selected) and 'Ownership'. The 'Basic' tab contains the following fields:

Owner Name	Address 1	Address 2
ACME Group LLC		
City	State	Post Code
New York	New York	
Email Address	Telephone	Cellular
Fax	Owner Reserve Amount	

A 'Save' button is located at the bottom right of the window.

Enter the appropriate information into the fields on the Basic tab. The Ownership tab fields are useful to indicate individual sub-ownership percentages. These fields are informational only and are not used for any equity calculations in the system.

Click **Save** to save your new owner record.

Editing/Deleting Owners

To edit existing owners, click the **Edit** button. The **Owner Information** screen appears where you can modify the information for the owner. Click **Save** to re-save the owner. To delete owners, click the **Delete** button for the record you want to delete. Click OK to confirm. Deletes are permanent and cannot be undone.

Vendors are companies or individuals that you do business with, and are used to tag accounting entries and work orders to indicate who money was transferred to or from. Accounting and work order reports will show vendors, and you can search, filter, group and sort by these vendors accordingly.

Creating a Vendor

Click the **Add New** button to create a new vendor. The **Vendor/Contact Information** screen appears:

Vendor / Contact Information

First Name <input type="text"/>	Last Name <input type="text"/>	Company Name <input type="text"/>
Address 1 <input type="text"/>	Address 2 <input type="text"/>	City <input type="text"/>
State New York <input type="button" value="v"/>	Post Code <input type="text"/>	Email Address <input type="text"/>
Telephone 1 <input type="text"/>	Telephone 2 <input type="text"/>	Website <input type="text"/>

Save

Enter the appropriate information for the Vendor record and click **Save**.

Editing/Deleting Vendors

To edit existing vendors, click the **Edit** button. The **Vendor/Contact Information** screen appears where you can modify the information for the vendor. Click **Save** to re-save the vendor. To delete vendors, click the **Delete** button for the record you want to delete. Click OK to confirm. Deletes are permanent and cannot be undone.

Management Fees tab

If you're a property management firm that manages properties for other clients, often your fees are derived from the percentage of payments received.

123Landlord will allow you to automatically calculate and keep track of this, to allow you to properly present your fee breakdown to your clients.

Before adding management fees, you should make sure you've added one or more owner records, and you've added your properties, tenants, and leases under the correct owner. If you've done this, you've been collecting your payments and generating payments due for each owner separately, and you're able to switch between owners to do data entry and run reports. See [Owners/Vendors tab](#) and [Current Owner](#) for more info. Note that you cannot use the 'None' owner for management fees.

Adding Management Fees

Click the **Add New** button to display the Management Fee screen:

Management Fee

Title:

Owner:

Rounding: ☐ Round Calculated Fee To Nearest Dollar

Fixed Amount: ☒

Percentage of Payments: ☐ Percent Of:

For Each Month Between:

Tips: When entering percentages, don't divide by one hundred (i.e. enter 3.25, not 0.0325). The system will create a management fee entry for each month (within the date range you specify), based on the payment amounts for that month. If you want to calculate an entry for each month for the whole year, for example, use Jan 1 to Dec 31.

Save

Enter a descriptive title for the fee configuration, and select the owner for which it will apply.

You can select between a percentage based fee or a fixed amount – in either case, enter the rate or the amount. For percentage based fee regimes, select whether this is calculated from collected only, or collected AND uncollected payments. Also specify the type of payments used in the calculation (rent & non-rent, rent & late fee, or rent only).

Specify the date range for which the fee structure will apply. Normally this would be for the entire year (Jan 1 to Dec 31), or specific fee periods (quarterly, etc.) If you change your fee structure throughout the year, or only charge a fee for a certain portion of the year, you can create multiple management fee configurations for the same owner

to reflect this. Try and keep your management fee periods from overlapping to prevent unpredictable results in calculations. When you run your Management Fee report later, you'll specify a date range for the run, and fee configurations that you add here that fall within that date range will be used in the report.

Note: when entering percentages into this screen, don't divide by one hundred (i.e. enter 3.25, not 0.0325).

Click the **Save** button. You can add more management fee configurations if you have more than one owner to set up fees for (you should add at least one fee configuration record each owner you collect from fees from, even if the rates are the same for all your owners).

The system will create a management fee entry for each month (within the date range you specify), based on the amounts for that month.

Once you're done setting up Management Fees, you can run the Management Fee Report.

Accounting tab

The Accounting tab enables you to specify your Accounting Codes and Periods, which are used in conjunction with accounting entries when you collect payments and create expenses.

Accounting Codes

123Landlord comes with a set of standard accounts, suitable for most general ledger accounting systems. You can elect to use the standard account codes, or create your own to match whatever coding standards you have in place in other systems.

To use the standard set of account codes, click **Add Standard Account Codes**. The standard list will be added and saved.

To use your own accounts, you can click **Add New** to create new ones:

Account Code

Account Name

GL Code

Description

Type

Income

Save

You should give the Account a name, a code, and specify whether it is an Income account or an Expense account.

You can use the **Remove All Account Codes** button to remove all account codes.

Sub Accounts

Each account can have any number of sub-accounts. The accounting areas of 123Landlord allow you to code income and expenses to an account and a sub-account if you wish. Sub-accounts are useful to provide specificity and to clarify accounting entries attributed to generic accounts like ‘Other Expenses’.

The number of sub-accounts for any account is displayed in the sub-accounts column of the accounts table:

Auto	Auto Expenses	2000	Expense	7	Edit	✖
------	---------------	------	---------	---	------	---

You can click any row to see the sub-accounts for that account expand:

Auto	Auto Expenses	2000	Expense	7	Edit	✕
Sub-Accounts			Add New Sub-Account			
Name	Description	GL Code				
Fuel	Auto - Fuel Expenses	2100	Edit			✕
Insurance	Auto - Insurance Expenses	2200	Edit			✕
Interest Exp	Auto - Interest Expenses	2300	Edit			✕
Lease Payments	Auto - Lease Payment Expenses	2400	Edit			✕
Maintenance	Auto - Maintenance Expenses	2500	Edit			✕
Other Exp	Auto - Other Expenses	2600	Edit			✕
Registration	Auto - Registration Expenses	2700	Edit			✕

Click the **Add New Sub-Account** link to add a new sub-account for that account. Click the **Edit** or **Delete** buttons to edit or delete sub-accounts.

Account & Sub-Account codes apply to all users in your 123Landlord account, and are available for use for all those with edit access to the accounting areas of the system.

Accounting Periods

Accounting entries in the system can be attributed to the current accounting period (if there is one) and you can run reports for the current accounting period or any other accounting periods you have defined. This helps to segregate data in the system into pre-defined fiscal ranges.

Click the **Add New** button to add a new Accounting Period:

Accounting Period

Period Name

Starts

Ends

Description

Make This The Current Accounting Period

Save

Give the period an identifying name, and specify the start and end date for which it applies. You can specify whether this should be the 'current' accounting period (this will be the default accounting period selected when creating accounting entries, running reports, etc.)

If this is the first accounting period you are adding, the **Make This The Current Accounting Period** field will be preselected as 'Yes'.

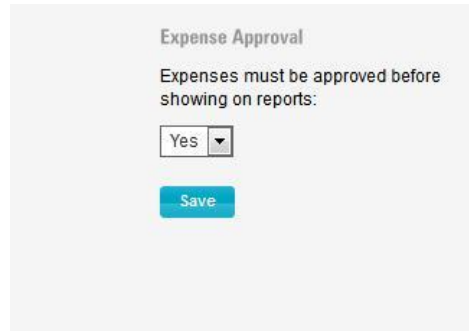
Click **Save** to save the new Accounting Period. Use the **Edit** and delete buttons to edit or deleting existing accounting periods.

Enabling Expense Approvals

The 'Expense Approval' option gives the user the ability to enable/disable the approving or unapproving of expenses. This option is used to keep new expenses that were not yet approved segregated from the main list, and to keep the unapproved expenses off reports until they are approved.

This feature is disabled by default, so you you'll need to enable this feature - to do so, go to the Admin screen, Accounting tab.

To Enable "Expense Approval", set it to Yes, and click Save:



Expense Approval

Expenses must be approved before showing on reports:

Yes

Company Logo tab

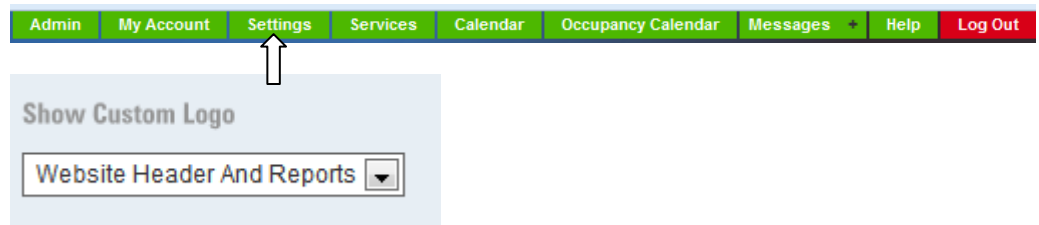
Adding a company logo will enable you to customize your 123Landlord screens and reports. Your custom company logo can be displayed on the main screen header and/or on reports (in the footer).

For best results use an image that is either exactly (or close to) 265 pixels wide and 86 pixels high. A transparent background (PNG or GIF format) is recommended. JPG files are also suitable.

Click the **Select Image File** button to browse to an image file on your computer, select it and click OK.

Then click the **Upload** button to start uploading the file to your account. The image is displayed in the Company Logo section when the upload is complete.

To display the logo in the system header and/or on reports, you must specify your preference in your user settings. Click the **Settings** button to display user [Settings](#).



Admin My Account **Settings** Services Calendar Occupancy Calendar Messages + Help Log Out

Show Custom Logo

Website Header And Reports

Choose how you want to display your company logo, and then click the **Save** button to close the Settings screen. Depending on the page you were on, you might have to refresh the screen to see the logo appear as you have specified.

Note: although the company logo is specified by an Admin user at the 123Landlord account level, the individual choice to actually *display* the logo (and where/how to show it) is at the **user** level – this means each one of your users has control over how the company logo is displayed. If you require all your employees to print reports in 123Landlord with your company’s logo on them in the footer, make sure you make this your company policy for all employees to set their 123Landlord user settings accordingly.

Custom States/Provinces tab

By default 123Landlord is preloaded with US and Canadian states and provinces. If you’re in a different region you will likely want to add your own custom items. Items you add here will be selectable options for “State/Prov” fields on tenant & property screens.

Click **Add New** to add a new custom state or province item:

Custom State/Province/Region

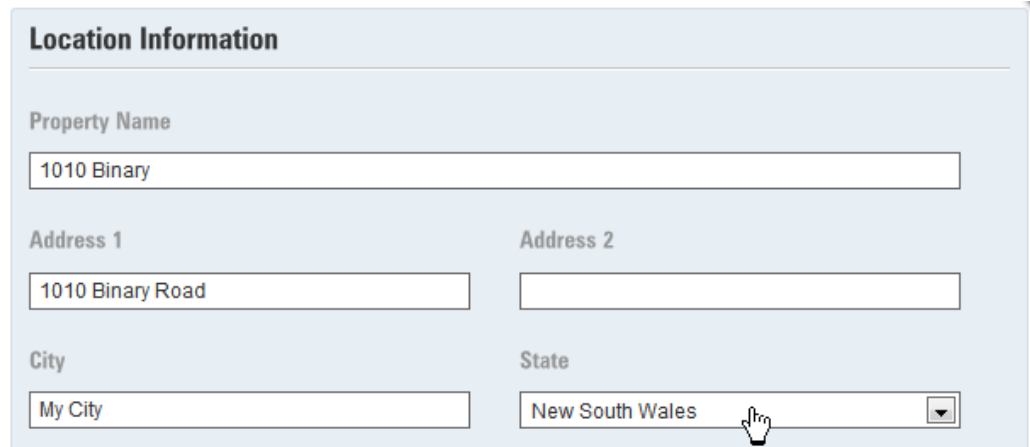
Name

Tip: this custom region is used exactly as it is entered here. You may wish to enter the long form (eg. New South Wales), or the abbreviated form (NSW).

Save

Click **Save** to save the item. Click **Edit** or **Delete** to edit or remove the item.

Your custom item is available in the **State** field on Property screens:



Location Information

Property Name
1010 Binary

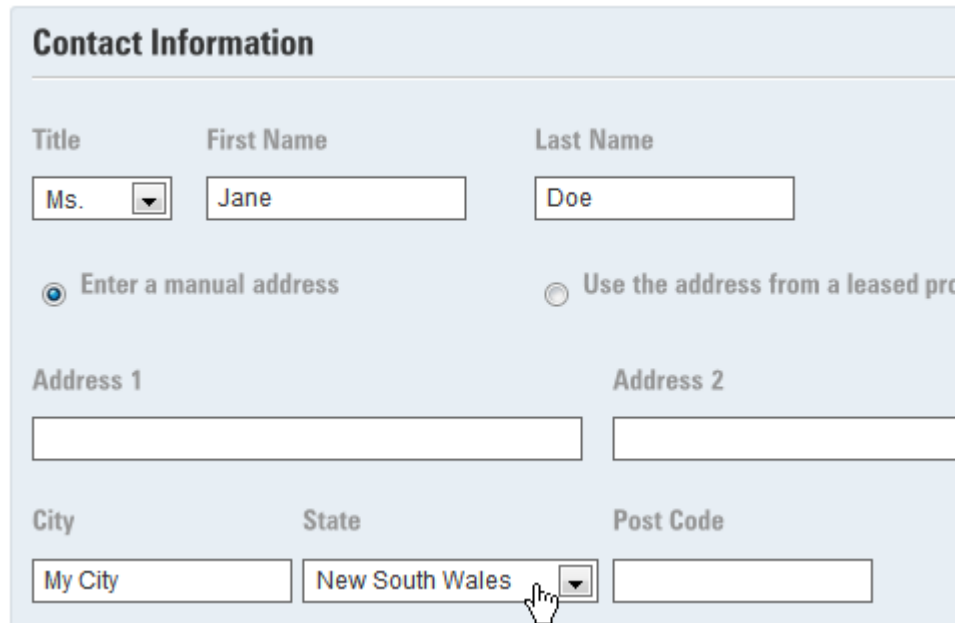
Address 1
1010 Binary Road

Address 2

City
My City

State
New South Wales

and on Tenant screens:



Contact Information

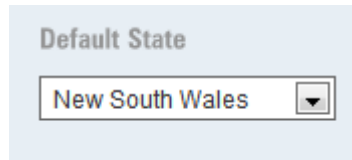
Title First Name Last Name
Ms. Jane Doe

☒ Enter a manual address ☐ Use the address from a leased property

Address 1 Address 2

City State Post Code
My City New South Wales

You can also ensure this is the **Default State** on the [Settings](#) screen:



Default State

New South Wales ▼

Custom Tenant/Property Fields Tabs

123Landlord is designed to be generic enough to be used in a wide variety of property management scenarios. Many of the fields on screens and reports are applicable to how most of our users operate their business, but sometimes you need more customized fields to handle information that is highly specific to you.

123Landlord will allow you to add custom fields for tenants and properties. These can then be used on tenant and property screens to add specialized information that is unique to your needs.

Click the **Add New** button to create a new Custom Tenant Field:



Tenant Field

Field Name

Save

Enter a **Field Name** and click **Save** to save the new tenant field. Keep in mind you're not adding the any tenant-specific information at this point, just the field type or name (for example, you would enter "Tenant Birthday" and not "Jan 14, 1977").

Click **Edit** or **Delete** to edit or delete as desired.

On the [Tenant Details](#) screen, you'll be able to see and edit these fields on the **Custom Fields** tab:

The screenshot shows the 'Tenant Details - Mark Bartlett' page with tabs for General Info, Leased Property, Charges & Balance, Contact History, and Custom Fields. The 'Custom Fields' tab is active, displaying a table with columns 'Field Name' and 'Value'. A modal window titled 'Add/Edit Field Value' is open, showing a dropdown for 'Field' (with 'Tenant Birthday' selected) and a text input for 'Value'. Below the input, it says 'or enter a date'. A 'Save' button is at the bottom right of the modal. A note on the right says 'You can manage fields for this tab on the Admin page.'

Tip: you can change the name of the custom fields tabs by editing it on the [Admin](#) page:

The screenshot shows a form titled 'Title of Tenant Custom Fields Tab'. It has a text input field with the value 'My Custom Fields' and a blue 'Update' button below it.

Additionally, if you want your custom fields to show on the [Tenants Page](#) as columns, indicate so with the **Show As Columns on Tenants List** drop down:

The screenshot shows a form titled 'Show As Columns on Tenants List'. It has a dropdown menu with 'Yes' selected.

The information and procedures above for the Custom Tenant Fields tab are the same for the Custom Property Fields tab, except the custom field (values) for Properties are added on the [Property Details](#) screen.

Inventory Tab

The Inventory tab is a handy, centralized place to keep a simple list of inventory items that can be associated with buildings or properties.

Often it is useful to track where particular equipment, furniture or other capital equipment is across many properties. Click **Add New** to add a new inventory item:

Inventory Item

Name

Type

Quantity

Comment

Building

Property

None

None

Brand

Cost

Serial #



Model #

Save

Enter appropriate information about the item, including Name, Type, and Brand and Serial # information. You can also select what Building or Property the inventory item currently belongs to. The Buildings and Properties in these dropdown lists are a global list from all owners, and (in this case) not specific to the current owner you have selected.

You can sort the inventory items in this list by selecting the field of your choice and clicking the **Sort** button:

Sort By:

Name  

My Account Page


The My Account page provides the ability for all users to manage their profile and view and upload common files accessible to all users on the account. In addition, the [Account Owner](#) user has access to the Billing tab, where billing and plan information can be viewed, and company information updated.

Profile Tab

All users can manage their own profile, consisting of basic user information, your email signature, and the ability to change your own password.

User Information – click **Edit** to modify your contact info:

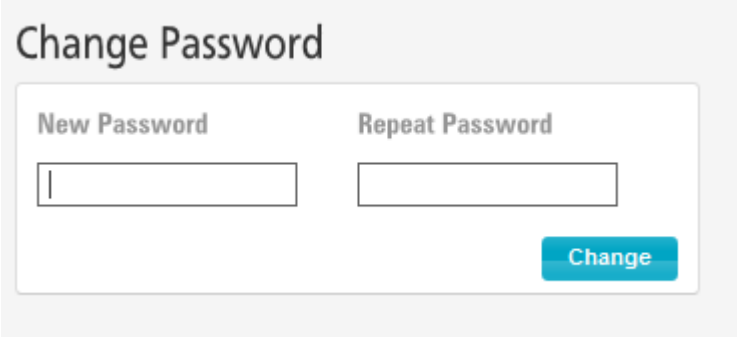
User Information

First Name	Last Name	Username
<input type="text" value="Landlord"/>	<input type="text" value="User"/>	<input type="text" value="landlorduser"/>
Address 1		Address 2
<input type="text" value="1234 Anywhere Road"/>		<input type="text"/>
City	State	Post Code
<input type="text" value="New York"/>	<input type="text" value="New York"/> 	<input type="text" value="10101"/>
Email Address	Telephone	Cellular
<input type="text" value="support@123landlord"/>	<input type="text" value="555 555 1111"/>	<input type="text"/>

Save


Click **Save** to save your changes. Your username is assigned by your Administrator and cannot be changed.

Change Password - enter a new password and click **Change** to save it.



The 'Change Password' form is a light gray box with a title 'Change Password' at the top. Inside, there are two input fields: 'New Password' and 'Repeat Password'. Below the 'New Password' field is a small vertical line indicating a password strength indicator. To the right of the 'Repeat Password' field is a blue 'Change' button.

Email Signature – click **Edit** to modify your email signature. This will be appended to the end of email messages sent by you in 123Landlord. Click **Save** when you have completed your changes.



The 'Email Signature' form is a light blue box with a title 'Email Signature' at the top. Below the title is a horizontal line. Underneath the line is the text 'Add custom text to be appended to the end of all your email messages sent through 123Landlord.' Below this text is a large, empty rectangular text area. In the bottom right corner of the text area, there are three small, faint icons. Below the form is a dark gray 'Save' button.

Billing Tab

The Billing tab shows the main contact information for your organization (your account) – this information is used on reports and other areas in the system where your organization's info is displayed (invoices, receipts, etc.) On most outgoing email sent in the system, the email address entered here will be used as the Sender and/or From address.

Only the [Account Owner](#) can see and interact with this tab.

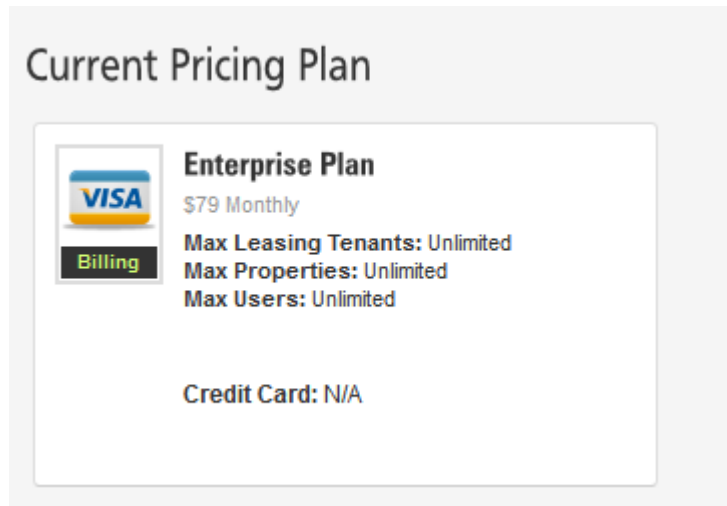
Your Company Information – click **Edit** to modify your company contact info:

Your Company Information

Company Name	Email Address	Website
<input type="text" value="ACME Properties LLC"/>	<input type="text" value="support@123landlord"/>	<input type="text"/>
Address 1	Address 2	
<input type="text" value="10101 W 81st St"/>	<input type="text"/>	
City	State	Post Code
<input type="text" value="New York"/>	<input type="text" value="New York"/> ▼	<input type="text" value="1011"/>
Telephone	Cellular	Fax
<input type="text" value="555 555 1111"/>	<input type="text"/>	<input type="text"/>

Save

Current Pricing Plan – this panel shows information about your current plan (free Basic or one of the paid plans), the property, tenant, and user limitations of your plan, and (if applicable) the last four digits of the credit card attached to the plan:

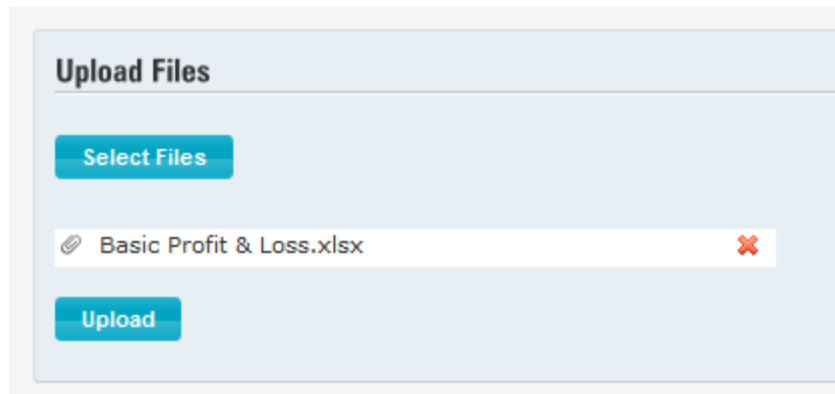


Note that the “Visa” icon displayed is not indicative of your payment method and is merely a design/user interface element to represent “billing” in general.

Common Files Tab

On this tab, any user can upload files and documents that all users have access to view, edit, and download. This tab is a useful place to post commonly used forms or letters that all employees and users need frequently.

Click **Upload Files** to display the Upload Files panel:



Click **Select Files** to browse to a file on your computer, select a file, and click OK.

Click **Upload** to transfer the file to the account:

Common Files & Documents

Upload Files

Common files and documents for all users on this account

File Name	Comment
Basic Profit & Loss.xlsx Uploaded on: May 21 2013	<div>Edit Info</div> <div>✖</div>

Click **Edit Info** to modify the Comment associated with the file. Click the **Delete** button to remove the file from your account.

Chapter
3

3. Applicants

Dashboard

Applicants

Buildings

Properties

Tenants

Payments

Applicants

First Name

Search by applicant name

1 applicants

<input type="checkbox"/>	Name	Received On	Desired Property	Tel
<input type="checkbox"/>	Mark Simms			555 555

123Landlord allows you to keep track of applicants before they become tenants, and you can manage their status (approved, declined, etc.) during the approval process.

New applicants, when created, are "Pending" - that is, they haven't been approved or declined. You can approve or decline them on the Applicants tab, and they will be flagged as such. We've also added a handy filter drop-down to let you select between all applicants, or only those that have been designated as approved or declined.

Furthermore, we've added the same Details page you've come to know from the Tenants areas - a full details page where you can do all of the things you'd expect about

applicants - keep track of references, employment info, notes, etc. You can also upload pertinent files & documents for that applicant.

You can convert the applicant to a full fledged tenant at any time - just click the Lease button on the Applicants list and you'll be able to create the lease etc - once you save that, the person will move from the applicants list to the Tenants tab list.

Special Note: There is built in support to import applicants from a specially designed application form that you can add to your website. To learn more or to have a custom application form developed to match the look & feel of your website, please contact us.

4. Buildings & Properties

Once you've set up your Account, you're ready to add Buildings & Properties. In this chapter, we'll discuss some terminology, show you how to add and manage property data, and run some basic property reports.

Difference Between Buildings and Properties

In 123Landlord, the system is designed to be as flexible as possible to allow users to work with a variety of property types. Many users work exclusively with single family homes, while others operate multi-tenant housing such as high-rise condominiums, apartment buildings, etc.

For all intents and purposes in 123Landlord, a “Building” record represents a physical structure that may house two or more “units” – for example, an apartment building with 25 separate units.

A “Property” then, represents a single unit – a single apartment in a larger building, or a single family home. The property or unit may have one or more tenants, but in 123Landlord it has one lease associated with it.

The term “property” might be less confusing for owners of single family homes, since the building generally is also the property. For operators of multi-tenant housing though, all you need to remember is that the building is the building, and the “doors” or “units” are the property.

What if you rent a single family home, divided into separate “units”? In this case, if each unit has a separate lease, you’d create a single building record for the home, and property records to represent your units (i.e “basement apartment”, “loft”, etc.)

You can link one or more properties in 123Landlord to a particular building record just to provide a way to group them together for data entry and reporting purposes

If you rent single family homes, it is likely that you don't need to worry about adding Buildings – just add Properties.

Current Owner

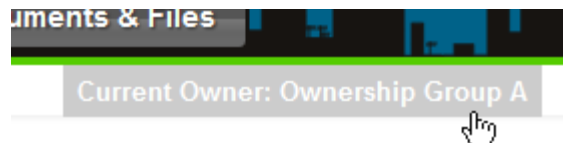
Everything you enter (properties, tenants, leases, payments, etc.) is within the context of the **current owner**. If you manage properties for multiple owners, you will have added them on the Admin screen's [Owner](#) tab.

For example, let's assume the owners you've added look like this:

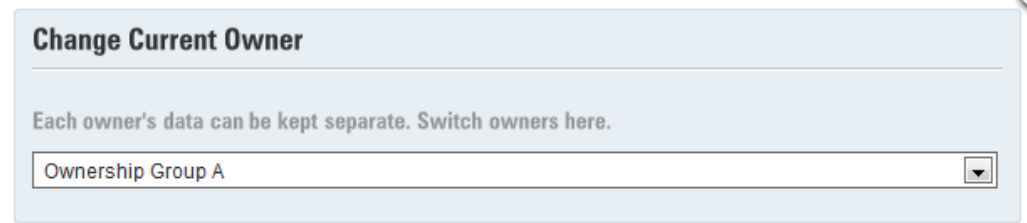
Owners Add New							
Owners are people or companies for which you manage properties and tenants							
Owner Name	Address 1	Address 2	City	State	Tel	Email	Reserve
Ownership Group A			Palo Alto	California			Edit ✖
Ownership Group B			Palo Alto	California			Edit ✖

This means that all data entered will be entered specific to that owner— all owner data is kept separate. Most reports that you run are run for the current owner (you can run for all owners also, if you wish).

You will see the **Current Owner** button (found on the top-right portion of most pages), and it shows that the current owner is set to "Ownership Group A":



If you click the Current Owner button, you will see the **Change Current Owner** screen:



Change Current Owner

Each owner's data can be kept separate. Switch owners here.

Ownership Group A

OK

Administrators can add, edit, & delete owners on the admin page.

Here you switch the current owner from one to another. Click **OK** to save the change. In most cases, the page will refresh and the data displayed will be with respect to the current owner.

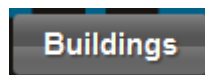
If you suddenly don't see any of the properties or tenants you have added, don't be alarmed – it is because those you have entered were entered for the previous owner, and none have been added for the (now) current owner. Switch back to the previous owner to see all of your previously entered data.


Special Note About the “None” Owner:


If you don't specify any Owners on the Admin page, all data entered will be entered under a blank owner called “None”. This is just a catch-all owner to represent the fact that you've chosen not to use Owner records.

Buildings Page

The Buildings page is the main listing of all your buildings. It is accessed most readily via the **Buildings** button on the [Main Toolbar](#):



Building Name  



Search by building name  

1 buildings



Building Name	Address 1	Address 2	City	Sta
Building ABC1	101 West Street E	#123	Palo Alto	Ca



Displaying records like 'Search by building name' sorted by Building Name

You can move between pages by clicking the Previous/Next page buttons:



 Page 1 of 1 

A tools panel contains functionality to allow you to sort, search, and print buildings:

Building Name  

Search by building name  

New Building

Click the **New Building** button to add a new Building:

Building Information		
Building Name	Address 1	Address 2
<input type="text"/>	<input type="text"/>	<input type="text"/>
City	State	Post Code
<input type="text" value="Palo Alto"/>	<input type="text" value="California"/>	<input type="text"/>
Telephone	Purchase Date	
<input type="text"/>	<input type="text" value="May-21-2013"/>	
Manager Name	Manager Telephone	
<input type="text"/>	<input type="text"/>	

Save

Enter a Building Name, Address, etc and click **Save**.

[Properties](#) can be added and assigned to Buildings.

Moving Properties From One Owner to Another

Ideally, you will have added your Owner records first, switched to a particular owner using the Current Owner button, and entered some properties and tenants in specific to that owner.

If you started entering properties before you added owners, and they have been filed into “None”, however, you might want to move them into actual owners.

To do so, click the **Properties** button on the [Main Toolbar](#):




Click the **Show More** button for the property you want to move:



The property row expands:

Property Name	Address	Size	Type
247 Alpine Street	247 Alpine Street #921	1902 ft²	Single Family Home
<div><div><div>247 Alpine Street 247 Alpine Street #921 Palo Alto CA Size 1902 ft² Year Built Not Entered Type Single Family Home Style Not Entered Building: East Block B Maintenance & Repair Issues (0 open) Photos (0)</div></div><div><div>This property This property is currently assigned to Ownership Group A, but you can do more. You can also add a building to this property.</div></div></div>			

Click the Move this Property to a different Owner button 

Move Property to Different Owner

Select the owner this property should now belong to.

Ownership Group B

This property is currently assigned to owner: Ownership Group A.
You can only see and select owners that you have been granted access to.

IMPORTANT: All linked leases (including Tenants on the lease), payments, accounting entries and work orders will also move to the new owner. Secondary tenants will move also, EXCEPT for those secondary tenants that have leases of their own (even closed or expired leases). If the property is linked to a Building, the building record will also move but **only if the Building does not have any other properties linked to it. If it does, the Building will not be moved over and this property will no longer belong to a building.** You can add a building manually afterward if you'd like, and then assign this property to it under the new owner.

Move Property

Here you can see that the selected property is assigned to Ownership Group A, but we can move it to Ownership Group B by selecting it from the dropdown list.

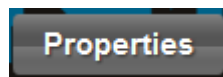
Click **Move Property** to perform the move.

Important: all linked leases (including Tenants on the lease), payments, accounting entries and work order will also move to the new owner. Secondary tenants will also move, EXCEPT for those secondary tenants that have leases of their own (even closed or expired leases). If the property is linked to a Building, the building record will also move but *only if the Building does not have any other properties linked to it. If it does, the Building will not be moved over and this Property will no longer belong to a building.* You can add a building manually afterward if you'd like, and then assign this property to it under the new owner.

More information on our blog: <http://blog.123landlord.com/post/2011/11/17/Move-a-Property-From-One-Owner-to-Another.aspx>

Properties Page

The Properties page is the main listing of all your leased and vacant properties. It is accessed from a number of places throughout 123Landlord, but most readily via the **Properties** button on the [Main Toolbar](#):



Leased Properties

Property Name

Search property name or address

New Property

3 leased properties

Property Name

Address

Size

Leased To

Lease Ends

Building

1010 Test Property	1010 Test Street		Mark Jones	Jun 03 2014		Details	✕
112 Alpine Street	112 Alpine Street #290	1902 ft²	John Smith	Jan 01 2014	East Block B	Details	✕
409 Alpine Street	408 Alpine Street #31	1902 ft²	Chris James	Mar 01 2014	East Block B	Details	✕

Displaying records sorted by Property Name

Vacant Properties

Property Name

Search property name or address

Lease

Details

3 vacant properties

Property Name

Address

Size

Type

Style

Bed

Bath

Building

247 Alpine Street	247 Alpine Street #921	1902 ft²	Single Family Home				East Block B	Lease	Details	✕
47101 Coventry Blvd	47101 Coventry Blvd NE	1800 ft²	Single Family Home				West Block A	Lease	Details	✕

Leased Properties are shown in the top panel, and Vacant Properties are shown in the bottom panel.

Sorting, Searching, & Printing

You can move between pages by clicking the Previous/Next page buttons:

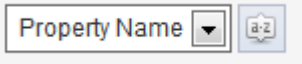


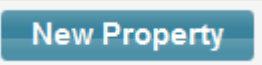



A tools panel contains functionality to allow you to sort, search, and print properties:

Property Name

Search property name or address

New Property

	Sort By Field Selector, Sort Button
	Search by property name or address field
	Filter by search criteria button, Remove filter (show all records) button, Find records by multiple criteria (advanced) button
	New Property button
	Print Current list button, Email current list as an attachment button

Expanded Details Panel

Each property row can be expanded by clicking the **Show More** button for it:



And the expanded row reveals a details panel with more advanced functionality:

 <p>1010 Test Property</p> <p>1010 Test Street Palo Alto CA</p> <p>Size Not Entered Year Built Not Entered Type Single Family Home Style Not Entered Building None Assigned</p> <p>Work Order Issues (0 open) Photos (0)</p>	 <p>Mark Jones</p> <p>Tel 555 555 1212 Cell Edit Lease Tenant Details</p> <p>Rent \$1,000.00 (Monthly) Balance \$0.00 Start Jun Mon 2013 End Jun 03 2014 1st Pmt Jun 10 Late Fee None Deposit None Last Pmt Next Pmt Jun 10 2013</p>	<p>No Photo Available</p>
--	--	---------------------------

Print Property Details Report



Click this button to display the property details report for the selected property. The report can be printed or export to Word, Excel, PDF, etc.

ACME Properties LLC		Property Details	
Location Information 1010 Test Property 1010 Test Street Palo Alto California Building Leased To Mark Jones		Classification Property Type Single Family Home Property Style Parking Heating Air Conditioning Flooring	
Layout Size (ft²) Bedrooms Bathrooms Year Built		Features & Amenities	
Comments			

|
 |
 |
 |
 Page 1 of 1 |
 |
 Pdf

Click the **Print Entire Report** button or **Export to Selected Format & Save File** button to save this report in the desired file format.

For more information, see [Reports](#).

Email Property Details Report



Generate the property details report and automatically send an email as an attachment.

Send Email

Find or Enter Email Address:

T

To:

None

Cc:

None

Bcc:

None

Attached File:

[PropertyDetails.pdf](#)

Subject:

Body:

Email All Tenants Associated With This Property



This button will allow you to quickly send an email to all tenants (primary & secondary tenants) linked to the Property.

Duplicate This Property



The Duplicate button will create a copy of the selected record as a new property. If the property belongs to an Building, the duplicate will be added to the same building. Leases will not be copied. All information about the Property will be cloned, including Location info, Classification, Layout, Features/Amenities, Comments, etc.

The duplicated property will be given the same name as the source property that was copied and an asterisk will be appended to the end of the name (eg. 1010 Test Property*). The duplicate property will be added the Vacant property list.

Move This Property to a Different Owner



See [Moving Properties From One Owner to Another](#).

Highlight This Record With Color



You can highlight the particular Property row with a the color of your choice. Click the **Highlight this Record with Color** button and the color selector appears:



Select a color and the row is highlighted accordingly. Choose 'Transparent' to reset the color to the default.

Send Email to this Tenant



Sends an email to the tenant associate with this property from within 123Landlord. Email sent this way gets added to the tenant's Contact History, with a copy of the outgoing email text archived.

Add Other Charges



Links to the associated Lease Edit page's [Other Charges](#) tab, where you can add or modify other, non-rent charges to this lease.

Collect Payment from this Tenant



Links to the [Collect Payment](#) page, where you can collect a manual payment for any due date or type.

View Payment History



Links to the [Payment History](#) page for this tenant/property, showing a list of all payments collected.

View Balance



Links to the [Balance Due](#) page for this tenant/property, showing any outstanding balances across all payment types.

Adding Properties

Click the **New Property** button to create a new Property:




New Property




You can also create a new property from the [Dashboard](#) (using the **Add New Property** button there):



The **Add New Property** screen loads:

 **Note:** Property name and address info are required.

Add New Property

Property Name (or Unit #)	<input type="text"/>	Property Type	<div>Not Entered </div>
Building	<div>None </div>	Size	<input type="text"/>
Address 1	<input type="text"/>	Address 2	<input type="text"/>
City	<div>Palo Alto</div>	State	<div>California </div>

Quick Save

Save & Enter More Info

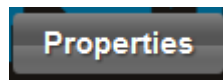
Property name and Address info are required for new property records. You can specify the **Building** the property belongs to by selecting from existing building records. When you do this, the Property will be linked to the Building throughout the system via linked dropdown lists, searches, etc. The Property will also appear under the Building when you expand a row on the [Building page](#).

Click the **Quick Save** button to save the Property immediately and go back to the main properties page (or the Dashboard if you came from there). The property is saved with minimal information.

Alternatively, you can click the **Save & Enter More Info** button to save the property, and be redirected to the [Property Details](#) page for the new record, where you can add much more information.



Managing Property Details

To view an existing Property's detail page, click the **Properties** button on the [Main Toolbar](#):



The [Properties page](#) loads.

For each property entered, either on the Leased Properties panel or on the Vacant Properties panel, there will be one row like this:


Property Name	Address	Size	Leased To	Lease Ends	Building
1010 Test Property	 1010 Test Street		Mark Jones	Jun 03 2014	Details 

Click the **Details** button to go to the Property Details page for that record:

Property Details - 1010 Test Property

General InfoWork OrdersInventoryCustom Fields

Location Information



1010 Test Property

1010 Test Street
Palo Alto CA

Leased

Building None Assigned
Leased To [Mark Jones](#)

Classification

Property Type

Property Style

Parking

Heating

Air Conditioning

Flooring

Single Family Home

Not Entered

Not Entered

Not Entered

Not Entered

Not Entered

Layout

Size

Bedrooms

Bathrooms

Year Built

Not Entered

Not Entered

Not Entered

Not Entered

Comments

None Entered

Listing Description

None Entered

Features & Amenities

Market Rent

\$1,000.00

Typical Deposit

\$500.00

Application Fee

\$25.00

Available On

May 17 2013

Collect a Payment

Print Property Details

Email Property Details

Email All Tenants in Property

Show Address On Map

45

The Property Details page will accept a wide array of information about your property. You should complete as much information as you'd like, specifying the Type, Style, Layout etc.

The following sections cover many of the sections and features of the Property Details page.

Property Details – General Info Tab

Location Information



The screenshot shows a web interface for 'Location Information'. At the top right of the section is an 'Edit' button. Below this is a property card. On the left of the card is a house icon with a red roof and a blue door, with a yellow 'Leased' badge at the bottom. To the right of the icon, the text reads: '1010 Test Property', '1010 Test Street', 'Palo Alto CA', 'Building None Assigned', and 'Leased To Mark Jones'.

In this section you specify the address and location information for the Property. It is important that each property has an identifying **Property Name** which is used throughout the system to refer it, and also an **Address**. Often these will be nearly the same – for example, it is fairly common to create a property that has a name of 123 Maple, and the address is 121 Maple Street South.

Properties are usually sorted by Name and sometimes (depending on your settings) by Address, so make sure you stick to a consistent naming scheme to ensure they sort in the order you expect.

Click the **Edit** button to make changes to the Location information:

Location Information

Property Name

1010 Test Property

Address 1

1010 Test Street

Address 2

City

Palo Alto

State

California

Post Code

Building

None

Street #

Apt/Suite/Unit

Street Name

Street Type

Street Direction

Save

In addition to an Address field, you can also specify the individual parts of the address (Street #, Apt #, Street Name, Type, Direction) to help the system display the property on a [Google map](#) or to show these fields individually on a Letter template.

Click **Save** to save your changes.

Classification

Classification

Edit

Property Type	Single Family Home
Property Style	Not Entered
Parking	Not Entered
Heating	Not Entered
Air Conditioning	Not Entered
Flooring	Not Entered

This section lets you classify the property based on a number of different parameters – you can specify the **Type** of property (eg. Single Family Home, Multi-Family Unit, Apartment Hi-Rise, etc.), **Style** (eg. Two Story, Single Level, Bungalow, etc.), and much more (Parking Type, Heating Type, Air Conditioning Style, Flooring components)

Click **Edit** and you can make changes to this info – click **Save** when done.

Classification

Property Type

Single Family Home

Property Style

Not Entered

Parking

Not Entered

Heating

Not Entered

Air Conditioning

Not Entered

Flooring

Not Entered

Save

Layout

Layout

Edit

▸ Size

1011 ft²

▸ Bedrooms

2

▸ Bathrooms

1.5

▸ Year Built

1997

Here you can specify layout information, indicating the **Size**, number of **Bedrooms** and **Bathrooms**, and **Year Built**. Click **Edit** to modify, and **Save** when done.

Layout

Square Feet

1011

Bedrooms

2

Bathrooms

1.5

Year Built

1997

Save

Tip: you can switch the Layout screen between **Square Feet** and **Square Meters** on the **Settings** screen:

Show Property Sizes In

Square Meters ▼

You might have to manually refresh the page to see this change reflect in the Property Details page:

▸ Size

1011 m²

Features & Amenities

Features & Amenities

Edit

▶ Balcony ▶ Dogs ▶ Elevator ▶ Telephone ▶
 Refrigerator ▶ Washer ▶ Microwave ▶ Courtyard ▶
 Dryer

The Features & Amenities section will help you keep track of the specific highlights, features, and selling points of your property. This is useful to be able to let potential renters know what is included in the property.

Click **Edit** to select (by clicking) from the pre-defined options:

Features & Amenities

Balcony	Deck	Elevator	Garage	Pool
Cable	Dishwasher	Fenced	Internet	Range
Cats	Dogs	Fireplace	Landscaped	Refrigerator
Children	Dryer	Fitness	Managed	Security
Courtyard	Electricity	Furnished	Microwave	Smoking

List Amenities

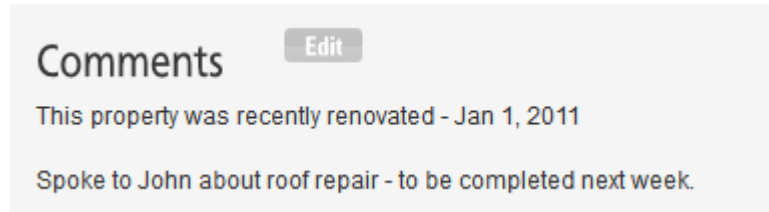
Balcony,Dogs,Elevator,Telephone,Refrigerator,Washer,Microwave,Courtyard,Dryer,

You can type additional features here - separate items with a comma

You can also enter in custom features and amenities into the text box – just separate them with a comma.

Click **Save** to save your changes.

Comments

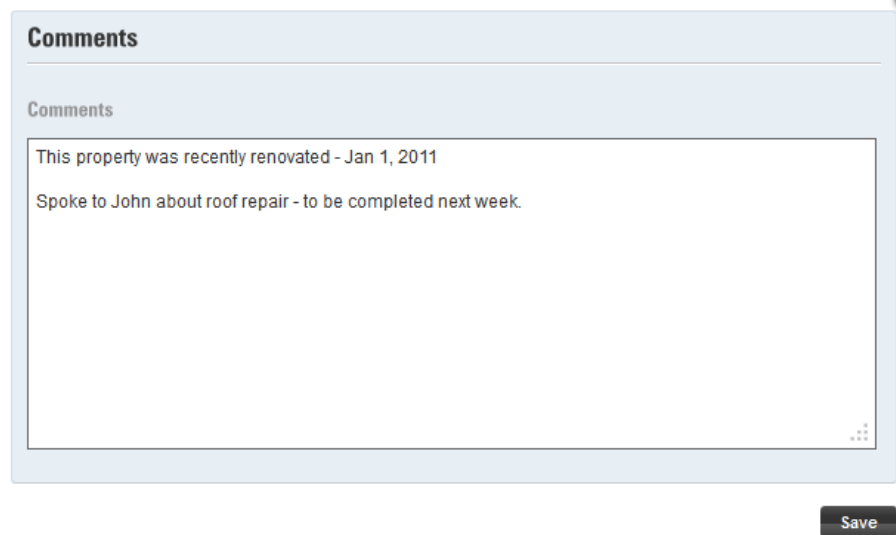
A screenshot of a 'Comments' panel. It has a title 'Comments' and an 'Edit' button. Below the title, there are two lines of text: 'This property was recently renovated - Jan 1, 2011' and 'Spoke to John about roof repair - to be completed next week.'

Comments Edit

This property was recently renovated - Jan 1, 2011

Spoke to John about roof repair - to be completed next week.

This panel is a general comments panel for the property – click **Edit** to enter them:

A screenshot of the full comments panel. It has a title bar 'Comments' and a sub-header 'Comments'. Below the sub-header is a large text area containing the same two lines of text as the previous screenshot: 'This property was recently renovated - Jan 1, 2011' and 'Spoke to John about roof repair - to be completed next week.' At the bottom right of the text area are three small icons. Below the panel is a 'Save' button.

Comments

Comments

This property was recently renovated - Jan 1, 2011

Spoke to John about roof repair - to be completed next week.

Save

And **Save** when complete.

Listing Information

Listing Description

[Edit](#)

Norfolk Housing Association is renting a 2 bedroom unit on the top floor of the newly renovated Flett Manor. Available as of May 15th sorry we do not have anything available for a later date...

Rent: \$1700

Security Deposit: \$1700

Lease term: Negotiable, 6 months

Pets: One pet allowed (no exceptions, sorry!), \$50 non refundable pet deposit required.

You will be the first to live in your newly renovated executive style two bedroom suite. Complete with brand new appliances (fridge, stove, dishwasher), new cupboards, laminate flooring throughout, stylish subway tiling in kitchen and bathroom, and free laundry in the building.

Rent includes: Heat, Water, Electricity, 1 powered uncovered parking stall and Laundry. Tenant pays for their own phone and cable.

The entire exterior of the building has also been renovated which includes new windows and doors to provide cozy warm apartments on those cold winter days.

The building is serviced by major bus routes and is a 5-10 minute walk from the college, subway station, access to downtown, and popular shops.

This section is intended as an area to store marketing descriptions, website copy, and other information used in your advertising and promotion for the property.

Files & Documents

This area is a handy place to store documents that are intended to be specific to this particular property. Examples of property-specific files might be things like lease addendums, feature sheets, amenity descriptions, or other promotional material.

Files & Documents

[Upload Files](#)

Files and documents specific to this property

File Name

Comment

Click the **Upload Files** button to display the file upload panel:

The screenshot shows a light blue panel titled "Upload Files". At the top left is a blue button labeled "Select Files". Below it is a white text input field containing the text "info.html". To the right of the input field is a red "X" icon. At the bottom of the panel is a blue button labeled "Upload".

Click **Select Files** to browse to the file you want to upload and click OK.

Click **Upload**. The file is transferred and appears as a link on the Property Details page:

The screenshot shows a section titled "Files & Documents". Below the title is a grey bar with the text "Files and documents". Below this is a table with two columns: "File Name" and "Comment".

File Name	Comment
info.html	Uploaded on: May 28 2013

You can add/modify the file Comment by clicking **Edit Info**.

Other

Market Rent, Typical Deposit, Application Fee, Available On

These fields are intended for supplementary information about the property. This info is not used in lease configuration or payment calculations.

Property Details – Work Orders Tab

Work Orders

Add New

Open issues for this property

Due	Summary	More	Type	Priority	Opened
Jan-31-2013	Fix leaky faucet	⌵	Repair	Medium	Jan-08-2013

Edit

✖

Work Description:

This faucet needs repair ASAP.

Labor Cost: \$200.00 Materials Cost: \$75.00 Serviced By: James Brown (Alto Widgets)

Invoice #: Work Started Date: Completed Date:

Pending issues for this property

Due	Summary	More	Type	Priority	Opened
No pending issues					

No pending issues


Closed issues for this property

Closed	Due	Opened	Summary	More	Type	Priority
No closed issues						

No closed issues

The Work Orders tab shows open, pending, and closed work order specific to the current property.

Click **Add New** to add a new Work Order linked to the current property.

Click the **Show More** button  to expand a work order row, showing a more detailed description, including costs and vendor information.



Click the **Generate Work Order Report** button to generate a details report.

Click the **Email** button to send the details report as an email attachment.

Click the **Edit** button to open the record for editing:

Work Order				
Property	Address	Building	Tenant	
11303 Coventry *	11303 Coventry Blvd NE Winston-Salem NC 27101		Mike Jarvis 11303 Coventry Blvd NE Winston-Salem NC 27101 555 555 1212 mikejarvis@jarvis.com	
Summary		Opened On	Date Due	
Fix leaky faucet		Jan-08-2013	Jan-31-2013	
Type	Status	Priority	Vendor	
Repair	Open	Medium	James Brown (Alto Widgets)	
Work Description				
This faucet needs repair ASAP.				
Key/Entry Instructions				
Tenant will be home for access to premises.				
Labor Cost	Materials Cost	Work Started	Completed Date	Invoice #
200.00	75.00			
<input type="checkbox"/> Include Accounting Entry For Costs <input type="checkbox"/> Labor Cost <input type="checkbox"/> Materials Cost		Accounting Entry Date Based On <input type="button" value="Opened On Date"/> <input type="button" value="Opened On Date"/>		File to Account Code <input type="button" value="Advertising"/> <input type="button" value="Advertising"/>
<input type="button" value="Save"/>				

Click the **Delete** button to remove it.

For more detailed information, see [Work Orders](#).

Property Details – Inventory Tab

Inventory
Add New

Add your inventory, electronics, furniture, or other capital equipment here.

Name	Type	Quantity	Serial #	Cost	
Washer		1	WA29302	549	Edit ✕

The Inventory tab lists inventory items specific to the current property. Click **Add New** to add a new inventory item linked to the current property.

Click **Edit** to open an existing inventory item for modification:

Inventory Item

Name
Type
Quantity

Washer

▼

1

Comment

Brand
Cost

LG
549

Serial #
Model #

WA29302
Front Load SA890123

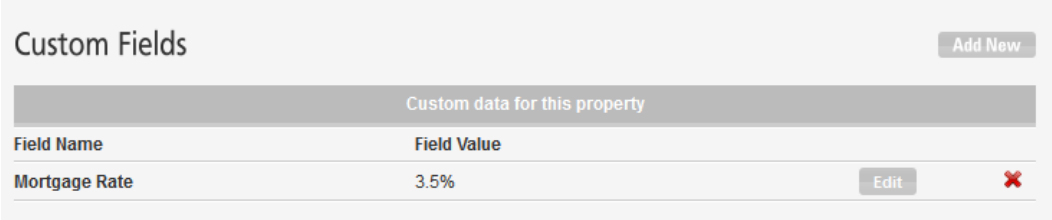
Save

Click **Delete** to remove an inventory item.

Property Details – Custom Fields Tab

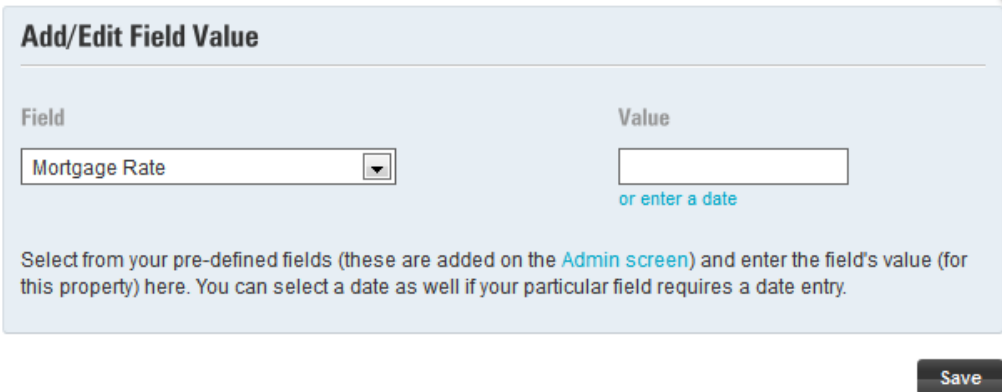
After you've added some [Custom Fields](#) on the Admin page, you can add property-specific values on the Property Details Custom Fields tab.

The Custom Fields tab might have a different label if you have given it a custom name (on the Admin page).



Custom Fields		Add New
Custom data for this property		
Field Name	Field Value	
Mortgage Rate	3.5%	Edit ✕

Click **Add New** to add a new custom field value:



Add/Edit Field Value

Field

Mortgage Rate ▼

Value

or enter a date

Select from your pre-defined fields (these are added on the [Admin screen](#)) and enter the field's value (for this property) here. You can select a date as well if your particular field requires a date entry.

Save

You will be able to select from the Fields you have previously created on the Admin page, and supply a value for the field specific to this property.

5. Tenants

After setting up your Buildings and Properties, Tenants are the next thing on your to-do list. You can enter and manage a wide variety of data about your tenants.

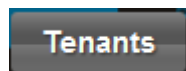
Primary & Secondary Tenants

In 123Landlord, leases can be assigned one primary tenant, and an unlimited number of secondary tenants. Secondary tenants can be roommates, a spouse, or anyone else who technically has a signature on your lease paperwork. Other occupants, such as children or dependents, don't need to be on the lease in the system as Secondary Tenants, but can be added on the [Tenant Details](#) page as Occupants.

In determining the limits of your plan, 123Landlord uses the primary tenant count – that is the number of primary tenants linked to a property via a lease. So if your plan allows for 12 properties and 12 tenants, that means you can technically have any number of tenants in the system, but only 12 linked to a property as a primary. Secondary tenants have no impact on plan limits.

Tenants Page

The Tenants page is the main listing of all your tenants – those that have a lease, and those that have no lease, or are former tenants or applicants. This page is accessed from a number of places throughout 123Landlord, but most readily via the **Tenants** button on the [Main Toolbar](#):



Tenants Leasing & Expired No Lease / Former

Last Name New Tenant

3 tenants with a lease Page 1 of 1

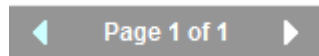
Name	Address	Tel	Balance	Last Pmt On	Next Pmt Due	
Chris James	408 Alpine Street #31	403 555 9912	\$4,450.00	May-07-2013	Jun-01-2013	Details ✖
Mark Jones	1010 Test Street	555 555 1212	\$0.00		Jun-10-2013	Details ✖
John Smith	112 Alpine Street #290	403 555 1212	\$6,100.00		Jun-01-2013	Details ✖

Displaying records sorted by Last Name

Leasing Tenants are shown in the first tab, and tenants with No Lease / Former tenants are shown in the second tab.

Sorting, Searching, & Printing



You can move between pages by clicking the Previous/Next page buttons:



A tools panel contains functionality to allow you to sort, search, and print tenants:

Last Name New Tenant

Last Name	Sort By Field Selector, Sort Button
<input type="text" value="Search by tenant name"/>	Search by tenant name field
	Filter by search criteria button, Remove filter (show all records) button
New Tenant	New Tenant button







 	Print Current button, Email current list as an attachment button
---	--

Expanded Details Panel

Each tenant row can be expanded by clicking the **Show More** button for it:



And the expanded row reveals a details panel with more advanced functionality:

 Chris James 408 Alpine Street #31 Palo Alto CA Tel 403 555 9912 Cell 403 555 9218 Last Contact On: (none entered) References (0) Residences (0) Employers (0) Occupants (0) Pets (0) Vehicles (0)	 409 Alpine Street 408 Alpine Street #31 Palo Alto CA Rent \$950.00 (Monthly) Balance \$4,450.00 Start Feb 01 2013 End Mar 01 2014 1st Pmt Feb 01 Late Fee None Deposit None Last Pmt May 07 2013 Next Pmt Jun 01 2013	 Tenant Details  Collect Payment  Payment History  Payments Due
--	--	--

Email Tenant



Sends an email to this system from within 123Landlord. Email sent this way gets added to the tenant’s Contact History, with a copy of the outgoing email text archived.

View Contact History With This Tenant



Navigates to the Contact History tab of the [Tenant Details](#) page, displaying the history of contact with this tenant.

Highlight This Row With Color



You can highlight the particular Property row with a the color of your choice. Click the **Highlight this Record with Color** button and the color selector appears:



Select a color and the row is highlighted accordingly. Choose ‘Transparent’ to reset the color to the default.

Add Other Charges



Links to the associated Lease Edit page’s [Other Charges](#) tab, where you can add or modify other, non-rent charges to this lease.

Make Changes to this Lease



Links to the [Lease Edit](#) page for this tenant/property, where you can modify the terms of the lease, rent amount due, payment schedule, and other charges and settings.

View or Edit this Property



Links to the [Property Detail](#) page for the property associated with this tenant.

Move Tenant Out



This button will display the Perform Tenant Move Out screen. More information about this feature in the next section, [Moving Tenants Out](#).

Other Links



Tenant Details

Links to the Tenant Details page (same action as the **Details** button)



Collect Payment

Collect a manual payment from this Tenant/Lease.



Payment History

Links to the Payment History page for this Tenant/Lease.









Payments Due

Links to the Payments Due page for this Tenant/Lease.

Generating Statements

You can generate statements showing current balance & payment history for any number of tenants on the Tenants page.

To create a statement, select the tenants you want by checking the box for that row:

4 tenants with a lease				
<input type="checkbox"/>		Name	Address	Tel
<input checked="" type="checkbox"/>		Chris James		408 Alpine Street #31 403 555
<input checked="" type="checkbox"/>		Mark Jones		1010 Test Street 555 555
<input type="checkbox"/>		Joe Namath + Chris James		1010 Test Street 555 555

Here we have chosen to generate statements for Chris James and Mark Jones.

Next, click the **Generate Statement** button:



The **Statement Options** screen appears:

Statement Options

Statement Date

Show Payment Details

Show Secondary Tenants

Include Closed Leases

Jun-06-2013

☒

☐

☐

[Change how the return address appears on invoices, receipts & statements](#)

Comments for Statement (optional, applied to all statements):

Email Attachment Options:

☒ One file per tenant (default)
 ☐ One file for all tenants

Email Subject:

Email Body:

Email Statement

To Tenants

Print Statement

You can specify the **Statement Date** that will appear on the statement.

If you have leases that have secondary tenants, you can choose to include those names on the statement as well – check the **Show Secondary Tenants** box to do so.

To add a comment to the statement, enter it into the **Comments For Statement** field. This comment is applied to all statements generated in the batch.

To include any closed leases that a tenant might have had in the past, check the **Include Closed Leases** box:

Include Closed Leases


☐

To include Payment History on the Statement, check the **Show Payment Details** box:

Show Payment Details

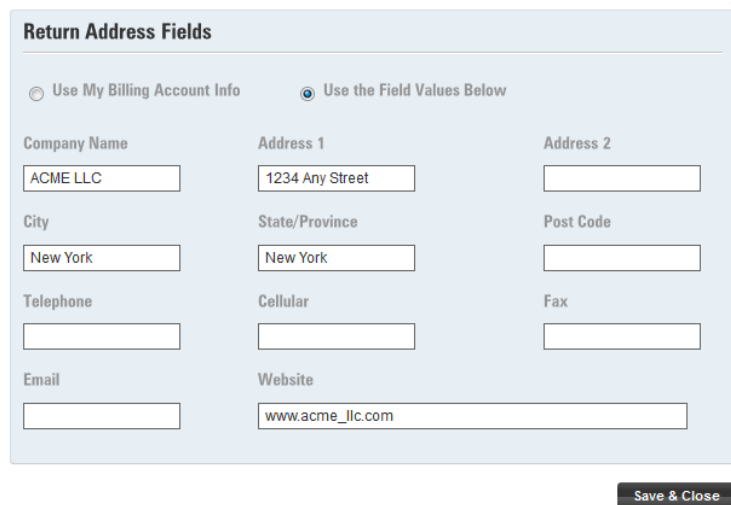
☒

This will show payment history details underneath each payment period on the statement:

Jun 01 2013	Rent	\$950.00	\$495.00	\$455.00
	PAYMENT RECEIVED:	May 31 2013	Rent	Check
				\$495.00

By default, the system will use your [Billing Account](#) info as the return address on the Statement – to override this, you can specify custom return address information – click the **Change how the return address appears...** link:

Change how the return address appears on invoices, receipts & statements



The image shows a 'Return Address Fields' dialog box. At the top, there are two radio buttons: 'Use My Billing Account Info' (unselected) and 'Use the Field Values Below' (selected). Below the radio buttons, there are several input fields arranged in a grid. The first row contains 'Company Name' (with 'ACME LLC'), 'Address 1' (with '1234 Any Street'), and 'Address 2' (empty). The second row contains 'City' (with 'New York'), 'State/Province' (with 'New York'), and 'Post Code' (empty). The third row contains 'Telephone' (empty), 'Cellular' (empty), and 'Fax' (empty). The fourth row contains 'Email' (empty) and 'Website' (with 'www.acme_llc.com'). At the bottom right of the dialog box is a 'Save & Close' button.

Company Name	Address 1	Address 2
ACME LLC	1234 Any Street	
City	State/Province	Post Code
New York	New York	
Telephone	Cellular	Fax
Email	Website	
	www.acme_llc.com	

Save & Close

Select **Use the Field Values Below** and specify custom information. Select **Use My Billing Account Info** to revert back to the default settings

Printing Statements

After you have configured how you want the Statement to appear, click **Print Statement** to generate the statement and display the report viewer screen:

ACME Properties LLC

10101 W 81st St
 New York New York 1011
 Tel: 555 555 1111
 Email: support@123landlord.com

Statement of Charges



Jun 06 2013

Chris James

408 Alpine Street #31
 Palo Alto New South Wales

Telephone 403 555 9912

408 Alpine Street #31Palo Alto New South Wales

Rent Payments & Late Fees				
DUE ON	DESCRIPTION	AMOUNT DUE	AMOUNT PAID	BALANCE
Jun 01 2013	Rent	\$950.00	\$495.00	\$455.00
	PAYMENT RECEIVED: May 31 2013 Rent Check \$495.00			
Jun 01 2013	Late Fee	\$0.00	\$0.00	\$0.00
May 01 2013	Rent	\$950.00	\$950.00	\$0.00
	PAYMENT RECEIVED: May 07 2013 Rent Check \$950.00			
May 01 2013	Late Fee	\$0.00	\$0.00	\$0.00
Apr 01 2013	Rent	\$950.00	\$0.00	\$950.00

From here you can print the statement or export it to PDF, which can be saved to your computer, emailed using your email software, etc.

Emailing Statements

You can also use 123Landlord to email the statement automatically, either directly to the tenant(s) on the statement, or to other recipients.

On the **Statement Options** screen, select how you want the email attachment to be sent:

Email Attachment Options:

☒ One file per tenant (default) ☐ One file for all tenants

You can specify a default email subject and body – this will be applied to all emails, but you can customize it on an per email basis as well later:

Email Subject:
<input type="text" value="Your statement is enclosed"/>
Email Body:
<input type="text" value="Please find your complete statement attached"/>

Also select whether you want to email the statement to tenants, or to other recipients:

Email Statement	To Tenants	<input type="button" value="v"/>
-----------------	------------	----------------------------------

and click the **Email Statement** button.

- Single Email Mode:

If you've selected **One File for All Tenants**, or the statement has only been generated for one tenant, a single **Send Email** screen will appear:

Send Email

Find or Enter Email Address:

To: Cc: Bcc:

Type a tenant, contact, or email address

To:

Chris James [chris@123landlord.com] ✕

Cc:

None

Bcc:

None

Attached File:

Statement.pdf

Subject:

Your statement is enclosed

Body:

Please find your complete statement attached

If you've specified that the statement be sent **to tenants**, the tenant email address (if entered in the system) will be pre-selected as a recipient. The subject and body text will also be pre-filled if you've supplied them on the Statement Options screen. If you've entered an Email Signature on the [My Account](#) page, the signature will be appended to the end of the email body.

If you've specified that **other recipients** receive the email, you will have to supply those email addresses here.

- Bulk (Batch) Email Mode:

If you've specified **One File Per Tenant** and the statement has been generated for **multiple tenants**, the **bulk Send Document Batch** screen will appear, allowing you to send the appropriate statement to each tenant, either individually, or in a mass batch send:

Send Document Batch

☐ Cc ☐ Bcc me on all emails, using this address:

User Account: support@123landlord.com

2 statements ready to send

Tenant	To:	Cc:	Bcc:	Subject	Details	Attachment
<input checked="" type="checkbox"/> Chris James	chris@123landlord.com			Your statement is enclosed	⬆	Statement.pdf
<input checked="" type="checkbox"/> Mark Jones				Your statement is enclosed	⬆	Statement.pdf

Each tenant for which a statement has been generated will appear as a row in this list.

If you specified that tenants will receive the email, their email addresses will be pre-filled here, if available. If you specified that other recipients will receive the email, you can supply those email addresses here.

Click the **Show More** button  to expand any row – this will display the details of each individual email message to be sent:

Email Message

To:

chris@123landlord.com

Tip: separate email addresses with a comma.

Subject:

Your statement is enclosed

Body:

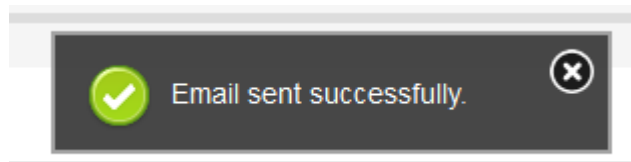
Please find your complete statement attached

You can completely customize each email message's recipients, subject, and body. Separate email addresses with a comma in the To: field. You can also add email addresses in the Cc: and Bcc: fields.

Click **Save Changes** when you are done customizing an email message.

When you are ready to send emails, you can click the **Send All Emails** button to send all messages automatically. They are sent as separate emails to the recipients as you have defined them – **each tenant or recipient will receive the individual statement attachment that has been generated for each tenant.** You can click the Statement.pdf hyperlink to preview the email attachment that will be sent for each tenant.

When the emails have been sent, the confirmation message appears:



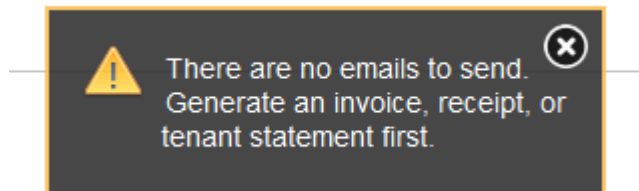
If you would like to only send a portion of the email messages displayed, click the blue

Send button for each individual row



Emails sent using this method are passed to a queue and are processed in the order they are received – depending on system load and the number of emails being sent by you and other 123Landlord users at that time, it may take seconds or minutes for your emails to be processed and sent. Report an issue to 123Landlord support staff if your emails do not arrive by the next day.

Note: if you wait too long to send your emails, or if you browse off this page and go back with the Back button on your browser, this page might have timed out – you'll see this message:



The data on this page is valid for about 15-20 minutes. This message means you will have to go back and generate your document batch again.

Moving Tenants Out

When a lease has expired and you do not want to renew the lease, or the tenant has been evicted, you have a few options in the system to handle the move out.



Click the [Move Tenant Out](#) button on the [Tenants page](#) for the tenant you want to move out. The **Perform Tenant Move Out** screen is displayed:

Perform Tenant Move Out

Moving this tenant out of this property will cause the lease to be closed and/or deleted and the property will be available to rent to other tenants and applicants. The tenant will move to the **No Lease / Former tab** on the Tenants page.

Other move out tasks can be configured below. Click **Complete Move Out** to complete the process.

Options

Delete or Close Lease

Close Lease ▼

Delete or Keep Payment History

Keep History ▼

Deleting a lease means all payment history and balances must be deleted as well. If you want to keep any outstanding balances on the account, select 'Close Lease'. If you want to also keep payment history for historical purposes, select 'Close Lease' and 'Keep History'.

Complete Move Out

Your options are to either:

1. **Close** the Lease (but do not delete it) and either Keep or Delete the existing payment history.
- or
2. **Delete** the lease, and delete the corresponding payment history.

If you choose to Close the lease, but not delete it, a record of the old lease will be kept, linked to the tenant. You can keep the tenant in the system for historical and perhaps contact purposes.

If you keep the Payment History, you will be able to pull up the closed lease on Payment History and Balance Due screen (by changing the filter to show Closed Leases), and you will be able to see all Charges & Balances on the Tenant Details page for that tenant.

Deleting a lease means all payment history and balances must be deleted also.

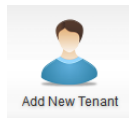
When you've selected your move out options, click the **Complete Move Out** button – the property will be available to rent to other tenants, and this tenant will move to the **No Lease / Former tab** on the Tenants page.

Adding Tenants

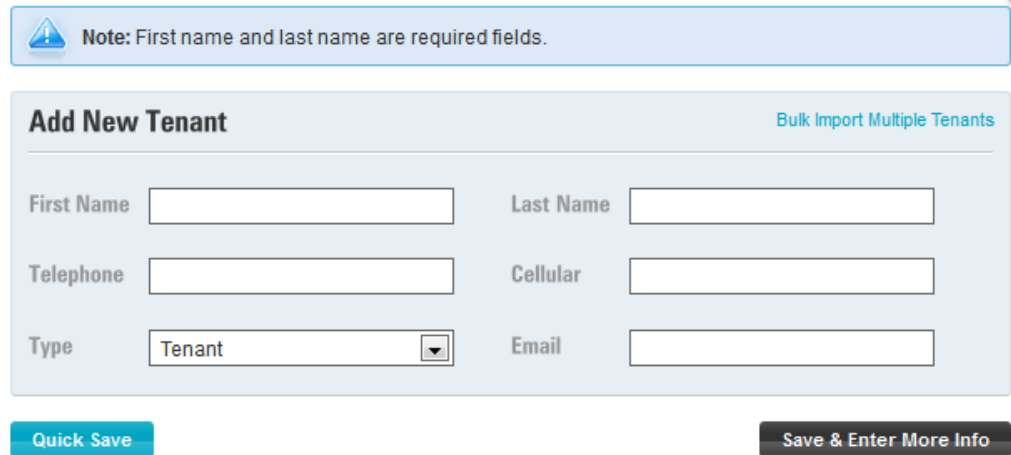
Click the **New Tenant** button to create a new Tenant:



You can also create a new tenant from the [Dashboard](#) (using the **Add New Tenant** button there):



The **Add New Tenant** screen loads:



Note: First name and last name are required fields.

Add New Tenant [Bulk Import Multiple Tenants](#)

First Name Last Name

Telephone Cellular

Type Email

Quick Save **Save & Enter More Info**

First Name and Last Name are required for new tenant records. Click the **Quick Save** button to save the Tenant immediately and go back to the main Tenants page (or Dashboard if you came from there). The tenant is saved with minimal information.

Alternatively, you can click the **Save & Enter More Info** button to save the property, and be redirected to the [Property Details](#) page for the new record, where you can add much more information.

Managing Tenant Details

To view an existing Tenant's detail page, click the **Tenants** button on the [Main Toolbar](#):



The [Tenants page](#) loads.

For each tenant entered, either on the Leased & Expired tab or on the No Lease / Former tab, there will be one row like this:


 Chris James	 408 Alpine Street #31	403 555 9912	\$4,450.00	May-07-2013	Jun-01-2013	Details	
---	---	--------------	------------	-------------	-------------	-------------------------	---

Click the **Details** button to go to the Tenant Details page for that record:

Tenant Details - Chris James

General InfoLeased PropertyCharges & BalanceContact HistoryCustom Fields

Contact InformationEdit



Chris James

408 Alpine Street #31
Palo Alto CA
support@123landlord.com
Tel 403 555 9912 Cell 403 555 9218

\$4,450

IdentificationEdit

Driver's LicenseNot Entered

Date of BirthNot Entered

Social SecurityNot Entered

Type, StatusTenant, Leasing

Tenant ProfileNot Entered

Tenant Rating☆☆☆

SmokerNo

Collect a Payment

Send Email to Tenant

Generate Credit Reports

CommentsEdit

None Entered

Tenant NotesAdd New

Add notes about the tenant, organized by date

Created	By	Note	Updated	By
No records				

Files & Documents


You can enter as much information about your tenants as you deem necessary. There are panels and sections for Comments, Notes, Files, References/Contacts, Residences, Employer Info, Children/Occupants, Pets, Vehicles, and more.

The following sections cover many of the sections and features of the Tenant Details page.

Tenant Details – General Info Tab

Contact Information

Contact InformationEdit



Chris James

408 Alpine Street #31
Palo Alto CA
support@123landlord.com
Tel 403 555 9912 Cell 403 555 9218

\$4,450

Basic contact information about the tenant (or applicant) can be stored here. Click Edit to make changes:

Contact Information

Title	First Name	Last Name	
<input type="text" value=""/>	<input type="text" value="Chris"/>	<input type="text" value="James"/>	

☐ Enter a manual address ☒ Use the address from a leased property

Properties Leased to this Tenant

Gender	Email Address	Telephone	Cellular
<input type="text" value="Male"/>	<input type="text" value="support@123landlord"/>	<input type="text" value="403 555 9912"/>	<input type="text" value="403 555 9218"/>

Save

You can enter a specific manual address for the tenant, or use the address from the property the tenant is leasing (if the tenant is currently linked to a property via a lease).

Identification

Identification

Edit

▶ Driver's License

▶ Date of Birth

▶ Social Security

▶ Type, Status

▶ Tenant Profile

▶ Tenant Rating

▶ Smoker

Not Entered

Not Entered

Not Entered

Tenant, Leasing

Not Entered

☆☆☆

No

Additional information about the tenant, including DL#, DOB, SSN, etc. can be stored in this panel:

Identification

Driver's License

Social Security

Type

Tenant

Date of Birth

May-28-2013

Profile

Tenant Rating

☆☆☆☆

Smoker

Save

Comments

A general-use comments area.

Comments

Edit

None Entered

Comments

Comments

Save

Tenant Notes

Here you can add date-stamped notes regarding this tenant.

Tenant Notes

Add New

Add notes about the tenant, organized by date

Created	By	Note	Updated	By
No records				

Note

Note Text

Save

Files & Documents

This area is a handy place to store documents that are intended to be specific to this particular tenant. Examples of tenant-specific files might be things like lease addendums, information release forms, agreements, or scans of personal documents (driver’s license, letters of reference, etc.)

Files & Documents

Upload Files

Files and documents specific to this tenant

File Name	Comment
No files	

Click the **Upload Files** button to display the file upload panel:

Click **Select Files** to browse to the file you want to upload and click OK.

Click **Upload**. The file is transferred and appears as a link on the Tenant Details page:

Files & Documents	
Files and documents	
File Name	Comment
info.html	
Uploaded on: May 28 2013	

You can add/modify the file Comment by clicking **Edit Info**.

References / Contacts

References / Contacts					Add New
Includes employment and credit references, or emergency contacts					
Reference Name	Telephone	Address	Relationship	Years Known	
No records					

Here you can add references of character, employment, and the like.

Reference / Contact

Reference Name

Telephone

Address

Relationship

Years Known

Save

Residences

Information about prior or current residences can be added here:

Residences

Add New

History of previous residences (or current residence for applicants)

Address	City	State	Years / Months
No records			

Tenant Residence

Address

City

State

Duration

Save

Employer Information

Intended for Tenant employment information:

Employer Information
Add New

Current and previous employment history

Employer Name	Employed For	Salary	Contact Name	Telephone
No records				

Employer

Employer Name

Contact Name

Telephone

Duration

Salary

Save

Children / Other Occupants

While roommates or other adults on the lease should be added as [Secondary Tenants](#), children and dependents can be added as other occupants here:

Children / Other Occupants
Add New

These people are occupants linked to this tenant that are not on the lease

Name	Relationship to Tenant	Comments
No records		

Occupant

Occupant Name

Relationship to Tenant

Comments

Save

Pets

Information about live-in pets:

Pets

Add New

Pets linked to this tenant

Type	Comment
No records	

Pet

Pet Type

Comments

Save

Vehicles

You can keep track of make, model, and plate numbers for all tenant vehicles:

Vehicles

Add New

Vehicles linked to this tenant

Make	Model	Tag / Plate #
No records		

Vehicle

Make

Model


Tag/Plate #

Save

Tenant Details – Leased Property Tab

This panel is informational, and shows the lease that the current tenant is linked to at-a-glance.

Leased Property



409 Alpine Street

408 Alpine Street #31
Palo Alto New South Wales

[Edit Lease](#) | [Property Details](#)

Rent \$950.00 (Monthly) Balance \$4,450.00
Start Feb 01 2013 End Mar 01 2014 1st Pmt Feb 01
Late Fee None Deposit None

Lease Payment Schedule

Feb-01-2013 - \$950.00	Jul-01-2013 - \$950.00	Nov-01-2013 - \$950.00
Mar-01-2013 - \$950.00	Aug-01-2013 - \$950.00	Dec-01-2013 - \$950.00
Apr-01-2013 - \$950.00	Sep-01-2013 - \$950.00	Jan-01-2014 - \$950.00
May-01-2013 - \$950.00	Oct-01-2013 - \$950.00	Feb-01-2014 - \$950.00
Jun-01-2013 - \$950.00		

The panel shows information about the lease rent rate, frequency, and start and end date. It also displays the late fee and deposit type, and the lease payment schedule. The lease payment schedule is the list of all due dates, based on the settings you have defined in your lease.

The **Edit Lease** link will take you to the [Edit Lease](#) page, where you can make changes to all aspects of the lease.

The **Property Details** link will take you to the [Property Details](#) page for the property that this tenant is leasing.

Other functions available from this panel are as follows:



Collect Payment from this Tenant



View Payment History



View Balance



Move Tenant Out

Tenant Details – Charges & Balance Tab

This tab displays all outstanding and fully-paid due dates for all leases associated with this tenant (including both open and former, closed leases).

Current Charges & Balance

\$4,450.00

409 Alpine Street - 408 Alpine Street #31 (Feb 01 2013 - Mar 01 2014)

[Edit Lease & Rent Charges](#)

Rental Payments & Late Fees								
Lease Period	Rent			Late Fees			Balance	Pmts
	Rent Due	Rent Paid	Subtotal	Late Fee (Days Late)	Late Fee Paid	Subtotal		
Feb 01 2013	\$950.00	\$0.00	\$950.00	\$0.00 (116)	\$0.00	\$0.00	\$950.00	⬆
Mar 01 2013	\$950.00	\$0.00	\$950.00	\$0.00 (88)	\$0.00	\$0.00	\$950.00	⬆
Apr 01 2013	\$950.00	\$0.00	\$950.00	\$0.00 (57)	\$0.00	\$0.00	\$950.00	⬆
May 01 2013	\$950.00	\$950.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	⬆
Total	\$3,800.00	\$950.00	\$2,850.00	\$0.00	\$0.00	\$0.00	\$2,850.00	

[Edit Other Charges](#)

Recurring Charges (Due Every Lease Period)					
Lease Period	Charge Type	Amount Due	Amount Paid	Balance	Pmts
Feb 01 2013	Garage Fee	\$75.00	\$0.00	\$75.00	⬆
Mar 01 2013	Garage Fee	\$75.00	\$0.00	\$75.00	⬆

This table also displays payment history, with each payment rolling up to the due date for which it has been collected – view payments by clicking

the **Show More** button



to expand the row for that period:

Lease Period	Rent Due	Rent Paid	Subtotal	Late Fee (Days Late)	Late Fee Paid	Subtotal	Balance	Pmts
Feb 01 2013	\$950.00	\$950.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	⬆
Payment: May 28 2013			\$950.00	Rent	Check	Ref #:		
Mar 01 2013	\$950.00	\$950.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	⬆
Payment: May 28 2013			\$950.00	Rent	Check	Ref #:		

The tenant's current charges are displayed, organized by charge category. The charge categories correspond to the types of charges you can add on a lease, and are:

Rent & Late Fees

These charges are inherent in every lease and do not have to be manually added. When you create a lease, rent charges are generated based on the start/end date, the 'first payment due on' date, and the payment frequency of the lease (monthly, weekly, etc.). Late fee charges appear when you enable late fees on the lease, and select a late fee type (flat fee, or per day)

Recurring Charges (Due Every Lease Period)

These charges are 'other, non-rent' charges and are configured on the lease to be due whenever rent is due (so, for each period due date). If your rent is due monthly, these charges are also due monthly. Examples include garage or storage fees, utility charges, etc.

Fixed Charges (Start or End of Lease)

Fixed charges represent things like Security Deposits, which are due once, and (commonly) at the start of the lease. These are due on the start date of the lease. You can also have fixed charges due at the end of the lease.

Manual Date Charges

For all other one-time charges that are due at irregular but known dates, you can add them as manual date charges. Examples include one-off charges like Returned Check fees, Key Replacement fee, etc.

For more information about adding these types of charges, see the [Edit Lease](#) page, for information about [Late Fees](#), and [Other Charges](#).

Tenant Details – Contact History Tab

This tab is a tabular list of all logged contact with your tenant. You can keep track of phone calls, emails, letters sent, and other correspondence to & from the tenant.

Contact History							Add New	
History of contact with tenant								
Contact Date	Contact Type	Person	To / From	Comment	Follow Up	Reminder?		
May-28-2013	Telephone	Landlord User	To Tenant		May-28-2013	Yes	Edit	✕

Contact with Tenant

Contact Date

May-28-2013

Contact Type

Telephone

Contact Name

Landlord User

To / From

To Tenant

Comments / Message

Spoke to tenant on the phone to clear up missing rent issue. Tenant will come down and clear payment up in person next week.

Follow Up On

May-28-2013

Dashboard Reminder

☐ Show follow-up reminder on dashboard

Save



Enter the Contact Date and Contact Type to indicate the type of correspondence and when it occurred. The Contact Name field contains a list of all users on your account.


You can check the **Show follow-up reminder on dashboard** box and enter a follow-up date, and this contact history item will appear as a reminder on the [Dashboard](#):

Contact History Reminders	
May-28-2013 Telephone	Chris James
<i>Spoke to tenant on the ph...</i>	

Note: Whenever an email is sent to a tenant through 123Landlord, a contact history item (with type 'Email') is automatically created and logged for that tenant. A copy of the outgoing message text and in some cases (reports, invoices, etc.) a link to the report attachment is also archived.

You can filter the Contact History list by a pre-defined date range and sort by various fields:

Date Range:	
All	
Sort By:	
Contact Date (Desc)	

Make a selection from the drop-down list and click the appropriate button  or



to execute your filter or sort.

Tenant Details – Custom Fields Tab

After you've added some [Custom Fields](#) on the Admin page, you can add tenant-specific values on the Tenant Details Custom Fields tab.

The Custom Fields tab might have a different label if you have given it a custom name (on the Admin page).

Custom Fields

Add New

Custom data for this tenant

Field Name	Field Value	
Birthday	Jan-01-1977	<div>Edit</div> <div>✖</div>

Click **Add New** to add a new custom field value:

Add/Edit Field Value

Field

Value

Birthday

Jan-01-1977

or enter a date

Select from your pre-defined fields (these are added on the [Admin screen](#)) and enter the field's value (for this tenant) here. You can select a date as well if your particular field requires a date entry.

Save

You will be able to select from the Fields you have previously created on the Admin page, and supply a value for the field specific to this tenant.

6. Leases

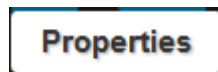
Now that you've added Buildings, Properties, and Tenants, you'll need to define the relationship between your properties and your tenants — this is done by creating Leases.

Creating a Lease

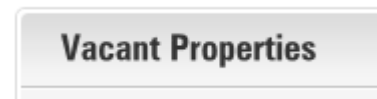
There are a few places in the system where you can create a new Lease. The most commonly used method is from either the [Tenants](#) or [Properties](#) pages.

From the Properties Page

Click the **Properties** button on the [Main Toolbar](#):




Click the **Show More** button for the property you want to lease (from the **Vacant Properties** list):




The property row expands:

Property Name	Address	Size	Type
247 Alpine Street	247 Alpine Street #921	1902 ft²	Single Family Home

**247 Alpine Street**
247 Alpine Street #921
Palo Alto CA
Size 1902 ft² Year Built Not Entered
Type Single Family Home Style Not Entered
Building: [East Block B](#)
[Maintenance & Repair Issues \(0 open\)](#) | [Photos \(0\)](#)

**This property is vacant**
This property is not currently assigned to a tenant, but you can do so by **creating a new lease**.
You can also add a new tenant on the **Manage Tenants** page

On the right side of the expanded panel, click the link pertaining to **creating a new lease**:

**This property is vacant**
This property is not currently assigned to a tenant, but you can do so by **creating a new lease**.
You can also add a new tenant on the **Manage Tenants** page

This will take you to the [Edit Lease](#) page, where you can set up the terms of the lease.

Note: an alternative method is to simply click the blue **Lease** button for any property row in the Vacant Properties list:

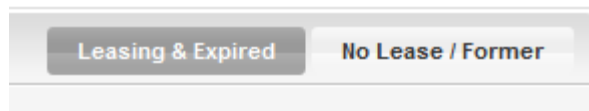


From the Tenants Page

Click the **Tenants** button on the [Main Toolbar](#):



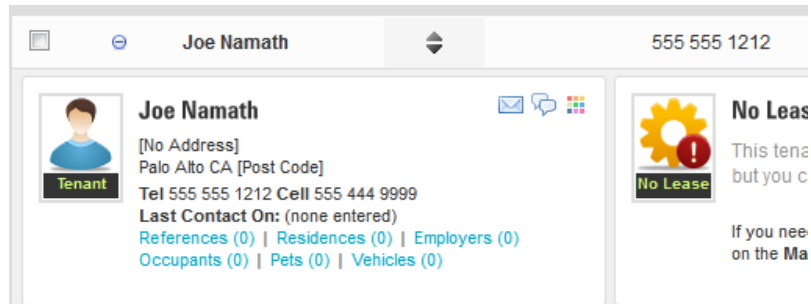
Make sure you're on the **No Lease / Former tab** if you want to create a new lease for a tenant that currently does not have an existing lease:




Click the **Show More** button for the tenant you want to lease a property to:



The tenant row expands:



On the right side of the expanded panel, click the link pertaining to **creating a new lease**:



No Leased Property

This tenant is not currently assigned to a property, but you can do so by **creating a new lease**.

If you need to add a new property, you can do that as well on the **Manage Properties** page

This will take you to the [Edit Lease](#) page, where you can set up the terms of the lease.

Note: an alternative method is to simply click the blue **Lease** button for any tenant row in the No Lease / Former tenant list:

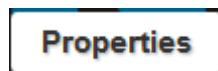


Editing an Existing Lease

The process to make changes to an existing lease is similar to the steps in initiating a new one, except everything starts from a property or tenant that already has a lease on it.

From the Properties Page

Click the **Properties** button on the [Main Toolbar](#):



Click the **Show More** button for the property you want to lease (from the **Leased Properties** list):



The property row expands:

The screenshot shows a detailed view of a property listing. On the left, under 'Test Property', it lists '11 m² Year Built 1997', 'Single Family Home', 'Style Not Entered', 'No Agents Assigned', and 'No Pending Issues (0 open) | Photos (0)'. On the right, under 'Mark Jones', it shows 'Tel 555 555 1212 Cell', 'Edit Lease | Tenant Details', 'Rent £1,000.00 (Monthly) Balance', 'Start Jun Mon 2013 End Jun 03', 'Late Fee None Deposit None', and 'Last Pmt Next Pmt Jun 10 2013'.

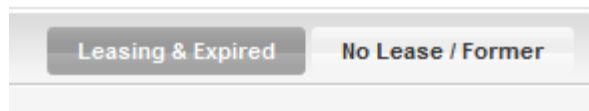
On the right side of the expanded panel, click the **Edit Lease** link. This will take you to the [Edit Lease](#) page, where you can make changes to the lease settings.

From the Tenants Page

Click the **Tenants** button on the [Main Toolbar](#):






Make sure you're on the **Leasing / Expired** tab to view tenants that already have leases assigned to them:




Click the **Show More** button for the tenant that has the lease you want to modify:



The tenant row expands:










409 Alpine Street

408 Alpine Street #31
Palo Alto New South Wales

Rent \$950.00 (Monthly) Balance \$2,400.00
Start Feb 01 2013 End Mar 01 2014 1st Pmt Feb 01
Late Fee None Deposit None
Last Pmt May 28 2013 Next Pmt Jun 01 2013

On the right side of the expanded panel, click the **Make changes to this lease** button:



This will take you to the [Edit Lease](#) page, where you can set up the terms of the lease.

Edit Lease Page

Whether you're editing an existing lease, or creating a new lease record in the system, you'll do this on the Edit Lease page. This screen allows you to define the leaseholders and terms of the lease, which will affect calculations that determine what charges are due, when they are due, and how much.

Note: The Edit Lease page will be discussed here from the context of creating a new lease – much of the same workflow and user interface elements are used when making changes to an existing lease. Topics specific to changing a lease such as [Payment Schedule Changes & Prorating Rent](#), [Entering Existing Balances](#), [Month-To-Month Leases](#) will be dealt with in separate sections that follow.

The Edit Lease page looks like this:

Leaseholders & Terms Tab

This tab is the main lease tab, and allows you to configure the properties and tenants on the lease, and the lease term & rental rate information.


Property & Tenant

To set up a lease, the first thing you should do is to specify the **Property** and the **Tenants** that are associated with it.

In 123Landlord, leases can be assigned one property, one primary tenant, and an unlimited number of secondary tenants. Secondary tenants can be roommates, a spouse, or anyone else who technically has a signature on your lease paperwork.

Other occupants, such as children or dependents, don't need to be on the lease in the system as Secondary Tenants, but can be added on the [Tenant Details](#) page as Occupants.

1. Select the Property to Lease:



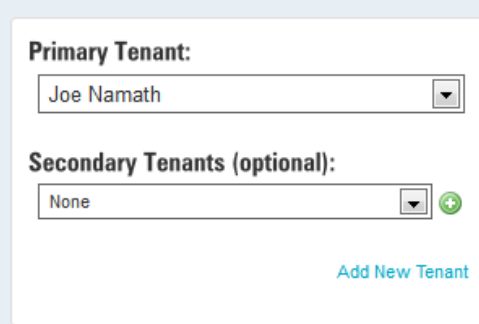
The screenshot shows a web form titled "Property to Lease:". It features a dropdown menu with the selected option "1010 Test Property * - 1010 Test Street". Below the dropdown, the selected property details are displayed: "1010 Test Property *", "Address: 1010 Test Street", "Palo Alto CA", and "Type: Single Family Home | Style: Not Entered". At the bottom, there is a checkbox labeled "Make tenant address match property address" which is checked.

If you came to the Edit Lease page by selecting the lease link on a Property from the Properties page, the property you selected will be pre-filled here.

If you check the **Make tenant address match property address** box, the tenant linked to the lease will have his/her address on file updated to that of the property he/she is now leasing.

If you do not check this box, the tenant and the property he/she is leasing could have different addresses – this may or may not be your intention.

2. Next, select the **Primary Tenant**:



The screenshot shows a web form titled "Primary Tenant:". It features a dropdown menu with the selected option "Joe Namath". Below this, there is a section titled "Secondary Tenants (optional):" with a dropdown menu showing "None" and a green plus icon to its right. At the bottom right of the form, there is a blue link that says "Add New Tenant".

If you came to the Edit Lease page from the Tenants page (by clicking a lease link) the primary tenant will be pre-filled for you. If you are editing an existing lease, the Primary Tenant selection will be locked – you cannot change the primary tenant on a lease once it has been saved. If you need to remove the primary tenant, you should close or delete the lease, [moving the tenant out](#).

- Next, add any Secondary Tenants:

You can have any number of secondary tenants; these are optional.

Secondary Tenants (optional):

Chris James 

Select a tenant from the list, and make sure you click the **Add** button. 

The tenant appears as a Secondary Tenant:

Secondary Tenants (optional):

Chris James 

Lease Term & Rental Rate

This information is required to ensure the system can calculate the correct charges due, and at the appropriate times.

- Select the Start Date and Term:

Start Date	Term
Jun-01-2013 	12  Months 
	<input type="checkbox"/> or go Month-to-Month

When you select a Start Date and Term, the End Date is pre-filled. You can then customize the End Date to suit.

If you check the **Or Go Month-To-Month** box, the system will ignore term and end date, and will continue the lease indefinitely. For more information, read [Month-To-Month Leases](#).

5. Enter the **Rent Amount** and how often it is due (**Rent is Due**):

Rent Amount	Rent Is Due
1200	Monthly ▼

6. Specify the First Rental Payment Due On date:

First Rental Payment Due On
Jun-15-2013 ▼

This date is important because it is used as the starting point for when rent is due. It is the first payment due date, and all subsequent due dates are derived from this date, based on the rent frequency (monthly, bi-monthly, weekly, etc.)

For example, if your lease paperwork technically was signed and started on June 1, but your payments are due on the 15th of every month, you should set the Start Date to Jun 1st, but the First Payment Due On date to be the Jun 15th.

7. Verify the Payment Schedule

To ensure that the system generates the lease due dates you expect, click the **Refresh** button in the **Payment Schedule** panel to see the payment schedule based on your settings:

Payment Schedule		
Jun-15-2013 - \$1,200.00	Nov-15-2013 - \$1,200.00	Mar-15-2014 - \$1,200.00
Jul-15-2013 - \$1,200.00	Dec-15-2013 - \$1,200.00	Apr-15-2014 - \$1,200.00
Aug-15-2013 - \$1,200.00	Jan-15-2014 - \$1,200.00	May-15-2014 - \$1,200.00
Sep-15-2013 - \$1,200.00	Feb-15-2014 - \$1,200.00	Jun-15-2014 - \$1,200.00
Oct-15-2013 - \$1,200.00		

[Refresh](#)

As you can see, our lease starts on Jun 1, but each payment is due on the 15th of each month.

Note also that even though we specified **12 Months** as our term, the system has generated 13 due dates. This is because the end date for the lease is actually Jun 30, so there is one extra due date at the end. If you intended to only have 12 payment due dates, you can retract the **End Date** a bit:

End Date

- And click **Refresh** to see your changes to the Payment Schedule:

Payment Schedule		
Jun-15-2013 - \$1,200.00	Oct-15-2013 - \$1,200.00	Feb-15-2014 - \$1,200.00
Jul-15-2013 - \$1,200.00	Nov-15-2013 - \$1,200.00	Mar-15-2014 - \$1,200.00
Aug-15-2013 - \$1,200.00	Dec-15-2013 - \$1,200.00	Apr-15-2014 - \$1,200.00
Sep-15-2013 - \$1,200.00	Jan-15-2014 - \$1,200.00	May-15-2014 - \$1,200.00

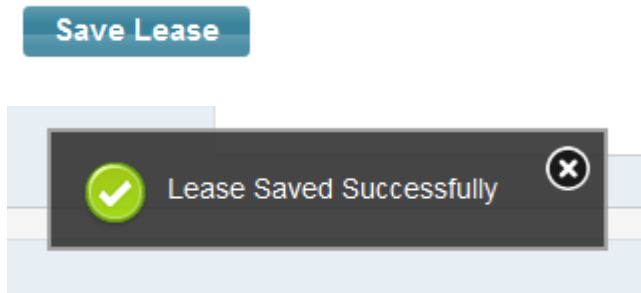
[Refresh](#)

Now, there are only 12 payments due.

You can experiment with different 'first rental payment due on' dates, end dates, and terms and click the Refresh button on the Payment Schedule to get the correct payment period due dates you require to match the terms of your lease paperwork.

9. IMPORTANT: Save your Lease!

Don't forget to save your lease:



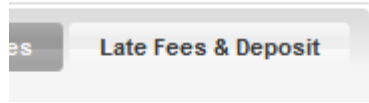
When you save a lease, the associated tenant will now appear on the **Leasing & Expired** tab of the Tenants page, and the property will appear in the **Leased Properties** list on the Properties page.

Late Fees

123Landlord is designed to allow you auto-calculate and collect late fees. The system supports most common late fee scenarios, including flat fees and fees based on the number of days late. Late fees can also be derived from a set amount per day, or a percentage of the rent due per day.

There are also a number of other settings that allow you to completely customize how late fees are calculated, including grace periods and maximum caps.

To add late fee calculations to a lease, select the **Late Fees & Deposit** tab on the Edit Lease page:



Click the **Late Fees** box to enable them:



The late fees settings are displayed:

 A screenshot of a settings form for late fees. It includes a text input for "days after the due date (grace period)" with the value "3". There are three radio button options: "Flat fee:" with a value of "0", "10 (base amount) + 3 per day*" (which is selected), and "0 percent (%) of rent per day*". Below these is a note "*Excluding grace period days" and a checkbox labeled "Stop calculating per day charges when rent has been paid in full for the period". At the bottom, there is a label "Maximum Late Fee:" followed by a text input containing the value "250".

Normally, late fees will be incurred in the system **as soon as rent appears due**. So if your lease expects payment on June 1, which is today, you'll see a charge on the [Payments Due](#) screen for Rent, and another one for Late Fee.

If you want to have a “grace period” or some number of days between when rent is due and when late fees actually kick in, enter that number in the **days after the due date (grace period)** field.

123Landlord supports two late fee types – flat fee and per-day charges:

☒ **Flat fee:**

Select this option and enter a flat amount to charge as your late fee. This late fee will never increase over time.

☒ **(base amount) +** **per day***

Select this option to have the system calculate late fees based on how many days late rent is. You can specify a base amount and a per day portion. For example, to simply have late fees set at \$5 per day, enter 0 for the base amount and 5 for the per day portion.

☐ **percent (%) of rent per day***

This option will calculate late fees based on how much the rent is. Note that this calculation uses the base rent amount, not the amount of rent that actually outstanding. So regardless if your tenant has paid \$850 of his \$1000 due, this late fee configuration will be based on a percentage of \$1000. So if you specify 0.1 (this means 0.1 percent, which is 0.01) here the system will calculate \$10 per day (on \$1000 rent).

Note: all per day charges take the grace period into account – so if your rent payment is 10 days late, but your grace period is 3 days, the late fee calculated will be based on 7 late days.

☐ **Stop calculating per day charges when rent has been paid in full for the period**

This setting allows you to limit how far late fees can accrue when rent has been collected in full.

When this box is checked, the system will look to see if the **rent for that period** has been paid in full. If it has, and the late fee **is set to a per day type**, the system will look to find the **last/most recent rent payment** for that period. Based on the **RECEIVED DATE** of that payment, the system will cap the late fee amount at that point. Whatever the late fee was at that point in time (when the rent was paid in full), that's where it will remain, no matter how long into the future we go.

Turn this setting OFF, and late fees will continue to accrue indefinitely based on your other per day rules, until you either collect the fee in full, or check the "this payment satisfies the late fee" box on the Collecly Payment screen to ignore them.

More info about this setting here:

<http://blog.123landlord.com/post/http://blog.123landlord.com/post/2013/05/28/New-Late-Fee-Settings-for-Per-Day-Late-Fee-Charges.aspx>

Maximum Late Fee:

This setting allows to specify a 'ceiling' or 'cap' value that the late fee will never exceed. Regardless of your other late fee settings, or how late the payment is, the late fee will be capped at this value. Leave this field blank to have late fees increase indefinitely.

Other Charges

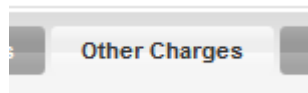
Most often, you'll have secondary charges associated with a lease other than just Rent and Late Fees. 123Landlord supports any number of additional non-rent charges, including Security Deposits, Application Fees, Utilities, Garage/Storage, HOA fee, or just about any fee you can imagine.

The system supports three types of charges:

- **Recurring Charges** – charges due each time rent is due
- **Fixed Charges** – charges due once, either at the start or the end of the lease.
- **Manual Date Charges** – charges due once, at a specified date.

Adding Other Charges

To add “other” non-rent charges, make sure you're on the [Edit Lease](#) page, and select the **Other Charges** tab:



Recurring Charges

To add a recurring charge that is due **each time rent is due** such as, for example, Garage Fee, select it from the **Description** drop down list:

 A screenshot of a form titled "Other Charges" in a light blue box. The form has two main sections: "Description" and "Amount". Under "Description", there is a dropdown menu with "Garage Fee" selected and a small downward arrow. Below the dropdown is a link that says "or suggest charge type...". Under "Amount", there is a text input field containing the value "12.50".


Specify the **Amount** that is due for each recurring payment.

Select Each Time Rent is Due:


Due

each time rent is due

And click the **Add** button:

Add


The charge appears in your **Current Charges on Lease** list:

Current Charges on Lease			
Garage Fee	\$12.50	each time rent is due	

Variable Charges

123 Landlord has the functionality to add other variable charges. This is great for charges like utility bills, because you can set up the lease with an estimated amount for the charge, and then override that on the fly to keep everything balanced

1. Create an 'Other' charge and select 'yes' to variable and click 'Add' to add the charge.
2. Make sure you 'Save' the lease

Important: these charges are not saved until you click the **Save Lease** button:

Save Lease

Description Utility	Amount 50	Variable? <input checked="" type="checkbox"/> Yes	Due Each time rent is due	Valid From 1st Payment	Valid Until No Expiry	Add
------------------------	--------------	--	------------------------------	---------------------------	--------------------------	---------

or suggest charge type...

- The charge will now show up on the Payments -> Payments Due tab.
- Select the 'Pencil' or edit icon to change the Amount Due for the payment.

Due On	Type	Amount Due
Oct-01-2015	Utility	45.35
Nov-01-2015	Utility	\$50.00

- Click the 'Save' icon to save the new value

Setting a Custom Validity Date Range

To add an 'Other' charge with a valid date range, following the same process of adding an 'Other' charge, but select a valid date range that falls within the Leasing dates.

The From - Until date range selectors allow you to be really specific about when a specific charge is valid¹. This feature is only relevant and available to charges that either recur each time rent is due, or monthly on a specific date. They aren't relevant to one-time charges. You'll see these selectors on the Lease Edit --> Other Charges & Credits screen:

Variable? Yes	Due Each time rent is due	Valid From 1st Payment	Valid Until No Expiry	Add
------------------	------------------------------	---------------------------	--------------------------	---------

rent is due

rent is due - valid from Oct-01-2015 until Dec-04-2015

rent is due - valid from 1st payment until Jun-30-2015

rent is due - valid from Jul-01-2015 until (no expiry)

rent is due on a specific day (5th) - valid from Sep-08-2015 until Dec-09-2015

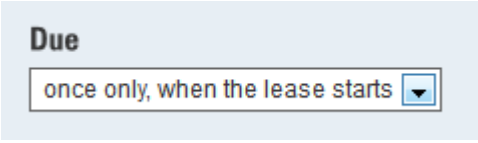
If you **don't** need a specific validity period for the charge, just leave them blank, which means the charge will be valid from the first rental period (which is derived from the 'First Payment Due On' date on the lease), all the way until the end of the lease (so the charge won't expire until the lease does).

¹ Note that the date ranges you select affect the periods of the lease - the due dates - not today's date. So even though today's date might be valid between your From and Until date selection, 123Landlord compares this date range to the due date of each period, so make sure your lease "First Payment Due On" date and end date fall within the ranges you want.

More info: <http://blog.123landlord.com/post/2015/11/04/New-feature-Custom-validity-ranges-for-non-rent-charges.aspx>

Fixed Charges

To add a fixed charge (for example a Security Deposit), the process is the same as adding Recurring Charges, except that you would select either **Once Only, When the Lease Starts** or **Once Only, When the Lease Ends** in the due field:




The image shows a light blue rectangular box containing the word "Due" in bold. Below it is a dropdown menu with a white background and a blue border. The dropdown is open, showing the text "once only, when the lease starts" in blue. To the right of the text is a small blue square with a white downward-pointing arrow.


If you choose 'when the lease starts', the charge will be due on the **First Payment Due On Date** of the Lease, and 'when the lease ends' will mean the charge will due at the **End Date** of the lease.

Manual Date Charges


For charges that are due once at a specific point in time (for example, a Key Replacement Fee that the tenant incurs for a lost key), you add them by specifying **Once, On a Specific Date** and selecting the date it is due:

Due

once, on a specific date: 


May-09-2013 

Editing Other Charges

To edit a charge, you must remove it with the delete button  and re-add it.

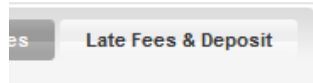
Collecting Other Charges

When you've added the "other" charges you need to open your lease, and saved the lease, you'll start to see these charges appear on the [Payments Due](#) list:

<input type="checkbox"/>	Joe Namath	1010 Test Property *	May-09-2013	Key Replacement Fee		\$50.00
--------------------------	------------	----------------------	-------------	---------------------	---	---------

Note because "today" is May 29 2013, the only payment that appears due is the Key Replacement fee, which was the manual date charge set to May 09. The first Rent payment due will appear on June 15, as will the recurring Garage Fee charge. The Security deposit fee, set at the "start" of the lease, is also due June 15.

Deposits



The **Late Fees & Deposit** tab allows you to enter information about how a lease's deposit is structured, but the settings on this tab are **mostly informational only**- they are not used in any calculation, and setting these will not generate charges:

 A screenshot of a form for setting deposit options. It includes four radio button options: 'None', 'Flat fee: 0', 'First payment', and 'Two payments (eg. first & last)'. The 'Two payments' option is selected. Below the radio buttons is a dropdown menu labeled 'Deposit is due:' with the value 'when lease starts' selected.

You can set your deposit info on this tab to have it appear in information panels elsewhere in the system:

 A screenshot of a lease information panel for '409 Alpine Street'. The panel includes a 'Lease 1' icon, the address '408 Alpine Street #31, Palo Alto New South Wales', and financial details: 'Rent \$950.00 (Monthly) Balance \$2,721.00', 'Start Feb 01 2013 End Mar 01 2014 1st Pmt Feb 01', 'Late Fee None Deposit First Rent', and 'Last Pmt May 28 2013 Next Pmt Jun 01 2013'. A blue arrow points to the 'Deposit First Rent' text.

To create a charge for a Deposit that you can collect, create it as an [“Other” Charge](#) on the lease. This will cause it to appear as a charge on the [Payments Due](#) screen and you can collect it like any other payment.

Payment Schedule Changes & Prorating Rent

If you need more control over how much rent is due and when, you can adjust the lease payment schedule – this allows you to prorate rent, or even change when rent is due for individual periods.

Browse to the [Edit Lease](#) page for a particular tenant/property, and scroll down to the **Payment Schedule**:

Payment Schedule

Feb-01-2013 - \$950.00	Jul-01-2013 - \$950.00	Nov-01-2013 - \$950.00
Mar-01-2013 - \$950.00	Aug-01-2013 - \$950.00	Dec-01-2013 - \$950.00
Apr-01-2013 - \$950.00	Sep-01-2013 - \$950.00	Jan-01-2014 - \$950.00
May-01-2013 - \$950.00	Oct-01-2013 - \$950.00	Feb-01-2014 - \$950.00
Jun-01-2013 - \$950.00		

Refresh

Click any individual due date you wish to make date or amount changes to:

[Feb-01-2013 - \\$950.00](#)
[Mar-01-2013 - \\$950.00](#)
[Apr-01-2013 - \\$950.00](#)
[May-01-2013 - \\$950.00](#)
[Jun-01-2013 - \\$950.00](#)

The **Edit Due Date & Amount** screen is displayed:

Edit Due Date & Amount

Date Due

Feb-01-2013

▼

Amount Due

950

Override this rent period by specifying a custom amount or due date.

Please note: These custom changes to the payment schedule will not be finalized until you click Save at the top of this page.

Also remember that changes to due dates or amounts due can impact payment history and balances for this lease - you may have to go back and modify existing payments to make sure the system does not consider them late.

Change

You can change the **Date Due** for the period, or the **Amount Due**.

Click the **Change** button when your changes are made, and the Payment Schedule shows your edits:

Payment Schedule

Feb-04-2013 - \$955.00	Jul-01-2013 - \$950.00	Nov-01-2013 - \$950.00
Mar-01-2013 - \$950.00	Aug-01-2013 - \$950.00	Dec-01-2013 - \$950.00
Apr-01-2013 - \$950.00	Sep-01-2013 - \$950.00	Jan-01-2014 - \$950.00
May-01-2013 - \$950.00	Oct-01-2013 - \$950.00	Feb-01-2014 - \$950.00
Jun-01-2013 - \$950.00		

Customized due dates are displayed in green. Don't forget to click **Save Lease** above to finalize your changes to the lease.

Note: these changes will not be finalized until you click the Save Lease button at the top of the Edit Lease page:

Save Lease

IMPORTANT: if you change the date due (or the amount due) for a period for which you've already collected existing payments, these payments will no longer be applicable to the new due date, or the previous amount collected might not be enough to satisfy the new amount due (or it might be too much).

When you make fundamental changes to the lease due dates in this way, it is recommended to do so BEFORE you've collected payments on it. However, in any case, the system will give you an opportunity to **move existing payments to the new due dates**:

Move Existing Payments to New Due Dates

Since you've just made changes to either the due dates on the lease or the amounts due, existing payments previously collected may not be accurate now. They may be allocated to the old due dates, or you might want to adjust the amounts collected.

You should do this now by verifying the due dates and the amounts for each payment on this lease. If the due dates do not match the new settings for the lease, you should adjust them accordingly. If you want to do this later, you can either manually edit each payment on the payment history page, or you can click 'Move Payments' at the bottom of this page.

6 payments						Page 1 of 2
Received	Type	Amount	Method	Current Period	New Period	
May-07-2013	Rent	<input type="text" value="950"/>	Check	May-01-2013	<input type="text" value="May-01-2013"/>	✗
May-07-2013	Garage Fee	<input type="text" value="25"/>	Check	May-01-2013	<input type="text" value="May-01-2013"/>	✗
May-28-2013	Garage Fee	<input type="text" value="75"/>	Check	Feb-01-2013	<input type="text" value="Feb-04-2013"/>	✗
May-28-2013	Rent	<input type="text" value="950"/>	Check	Feb-01-2013	<input type="text" value="Feb-04-2013"/>	✗

Ignore
Move Payments

Your existing payments will be shown, and the date they are assigned to shown in the **Current Period** column. For each payment, you'll have to re-align it to a new due date – the new due dates are shown in the drop down list.

For example, in the previous steps we made a change to the Feb 1 due date, changing it to Feb 4 and the new amount required was \$955 instead of \$950.

Our payments for the May 1 due date are fine, we select May 1 for those. The payments for Feb 1, however, must be moved to the Feb 4 due date, so we select that.

Click **Move Payments** when you are satisfied with how your existing payments are allocated.

If you have only made changes to the **amounts**, and not the **due dates**, you likely do not need to move payments. Payments that might have been previously “paid in full” might not be now though, because you’ve specified a different amount is due for that date.

If you do not move payments when you should and you click **Ignore**, your old payments will not be applied to the new due dates, and these due dates will appear as unpaid and/or overdue.

You can manually go into the [Payment History](#) page, delete and re-add these payments, or edit them directly and re-point them to the new period due dates.

More info about this topic on our blog:

<http://blog.123landlord.com/post/2012/08/07/On-Moving-Payments-When-Editing-Leases.aspx>

Entering Existing Balances

First time users of 123Landlord often ask how to account for an existing balance in the system.

Example:

The current date is May 30 2013. John has been renting the same house since Nov 12th, 2007. His rent is \$1000 per month, payable on the 15th of every month. You are setting up his lease in the system for the first time, and he has an existing balance of \$585.

Keep in mind that the **Start Date** for your lease can be any date – it can match the date in your paperwork, so this can be Nov 12, 2007.

You obviously don't want to collect payments in the system that far back, so you'd set your **First Payment Due** date to be something reasonable, like Jan 15th of the current year (many users like to back-collect all payments from the current year). So you'd have to back-collect payments for Jan 15, Feb 15, Mar 15, Apr 15, and May 15.

How to handle the additional \$585 that is outstanding?

There are two different ways to accomplish this:

Method 1: Include Existing Balance in First Payment Due Date

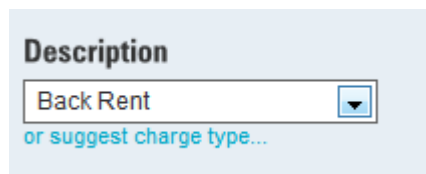
Once you have the lease set up as outlined above, you can manually adjust the Payment Schedule so that the for the **first** rental payment due date, the tenant owes the regular rent PLUS the \$585. See the [Payment Schedule Changes](#) section for information on how to do this.

This will cause the tenant to owe \$1585 for Jan 15, which you can collect in one transaction, or multiple partial payments.

Method 2: Create Balance Owing as Separate “Other” Charge

If you don't want to include the balance owing into a period due date for rent, you can accomplish this in another way.

The second way to do this is to add an “Other” charge for the balance owing – just select an appropriate payment type:



The image shows a screenshot of a software interface. At the top, the word 'Description' is written in bold. Below it is a dropdown menu with 'Back Rent' selected. To the right of the dropdown is a small blue square with a white downward arrow. Below the dropdown menu is a link that says 'or suggest charge type...' in blue text.

Available charge types that might be applicable for this include Back Rent, Miscellaneous, Prorated Rent, etc. – just select one and enter the balance owing (\$585). Set the payment to be due **once only, when the lease starts**, or **once on a specific date** – either option will be fine.

Save the Lease, and then view the Payments Due screen. You'll see that this balance owing is added as an extra charge – you can collect this payment normally.

The advantage to this method is that you can track it and invoice it separately, and it show up in reports under a different charge type than Rent, so there's a bit more transparency about how much money is owed above and beyond day-to-day rental payments.

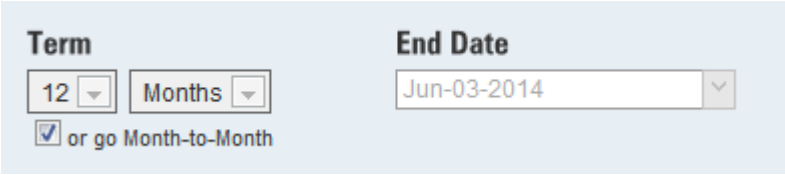
Month-To-Month Leases

Often you'll have a tenant that is renting month-to-month and the term is open ended.

Technically speaking, there isn't much difference to 123Landlord between a lease that repeats month-to-month, and one that has an end date extended way out into the future (eg. let's say 5 years out) – the system will still expect rent due each month, and you can move the tenant out and close or delete the lease whenever you need to.

The simplest answer here is that if you have a lease that is “month-to-month”, you can just create the lease in the system with an end date that is so far out into the future that you won't have to worry about it “expiring” for the next few years.

You can, however, use the **Month-to-Month** box on your Lease settings, which looks like this:



The screenshot shows a light blue rectangular box containing two sections. The left section is titled "Term" and contains two dropdown menus: the first is set to "12" and the second is set to "Months". Below these is a checkbox that is checked, followed by the text "or go Month-to-Month". The right section is titled "End Date" and contains a text input field with the date "Jun-03-2014" and a small downward arrow icon to its right.

When you go month-to-month, the **Term** and the **End Date** are irrelevant, so they are disabled.

Basically, what is happening under the hood is that 123Landlord is just extending the end date out **twenty years**, so for all intents and purposes a month-to-month lease doesn't expire.

If you use this option, that's the only difference – you'll still be collecting payments each period, and you'll still close the lease when you want to move the tenant out.

Adjust Rental Rates Going Forward

The Rental Rate Adjustment feature gives you the ability to adjust rental rates for any or all leases going forward, without having to do it manually.

Open the Admin → Update Leases tab to choose to Increase or Decrease rent, and then choose which specific leases to perform the operation on (or all leases) - note that only *open* leases are shown.

Update Leases

Increase ▼

the Rent amount for the following leases:

☐ All Open Leases
 ☐ 1010 Test Property * - Joe Namath (Rent: \$1,200)
 ☒ 409 Alpine Street - Chris James (Rent: \$950)

by:

2.5

Percent ▼

for all due dates:

After & including ▼

Sep-01-2014 ▼

Update

*All due dates (for the selected leases) within the range !
previously paid due dates, this may cause them to show*

You can adjust the rental rate by a fixed amount (eg \$25) or a percent (eg 2.25 %) - if entering percent, just enter the number without the percent symbol, and enter it as 2 (for 2%), not 0.02.

You can perform the rent amount update for any due dates either **after** a specific date, or **after and including** the date you choose.

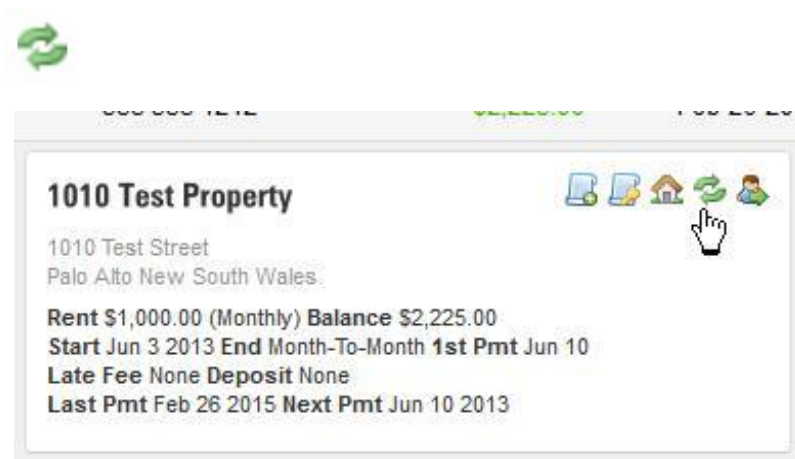
Example:

To increase the rent by 2.5 % for all leases for all months after and including Sept 1, select the options as shown in the screenshot above and click Update.

When the update is complete, you'll see a "Lease Update Complete" message - do **NOT** repeatedly click the Update button if the operation appears slow, this may result in duplicate runs of the update and increase (or decrease) the rent amount more than you had anticipated.

Renewing a Lease

From either the Tenants, Properties, or Dashboard screens you have the option to renew a lease (you might have to expand the tenant or property row to see it):



Clicking this button will display the Renew Lease screen:

Renew Lease

This will create a new lease for the same tenant & property with new terms, renewing tenancy for the date range specified below.

The old lease will be closed and archived - you can still view any outstanding balances or payments due for the old lease by viewing the Tenant Details / Charges & Balance tab, or on the Payments / Payments Due screen by choosing to "Include Closed Leases".

All other terms of the lease will be copied from the old lease, with the exception of fixed date charges which will not be copied (those that are set to "Once only..."). You should add these manually afterward.

New Terms

Start Date	Sep-01-2015
End Date	Dec-31-2015
First Payment Due	Sep-01-2015
Rent Amount	1025

Renew Lease

You are now able to specify the terms of the new lease, including the start date, end date, and when the first payment is due (all subsequent payments are derived from this date). The lease will recur at the same frequency as the original lease (monthly, weekly, etc) and much of the information (property, tenant, etc) will be copied over to the new lease. The existing lease will be closed and archived. Late fee information cannot be changed - if you need to change the late fee structure for the new lease you will have to create a new lease manually using the second (Move Tenant Out) method described above.

Note that you can increase/decrease the rent amount for the new lease.

If the old lease had any "Other" non-rent charges applied to it, the Renew Lease function will **only copy over the ones that were set to recur whenever rent is due.** Fixed date charges will not be carried over; you will need to add these afterward manually.

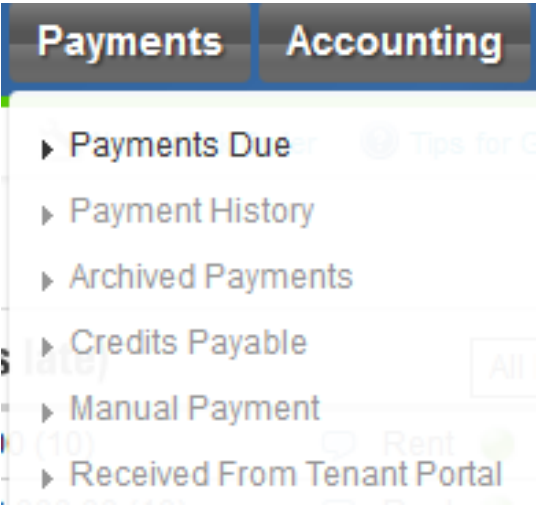
Once you click Renew Lease, the old lease will be closed and archived, which means if there are any outstanding balances or payments due on it (for example, if you renew the lease before the tenant has paid last month's rent) - you likely won't see these charges on the Payments --> Payments Due screen unless you toggle the filter drop-down on that screen to "Include Closed Leases". Then you can pay these items normally.

7. Payments

With your leases set up, you're ready to view payments due, generate invoices, collect payments, issue receipts, and view payment histories.

Payments Due

Once you have created tenants, properties, and leases, the system will start expecting payments as they become due. All payments due in the system will appear on the Payments Due screen – hover over the **Payments Button**, and click **Payments Due**:



The **Payments Due** page loads:

Payments - All Tenants

Hide Closed Leases

Payments Due

Payment History

Tenant & Period

Show Payments Due: All

Generate Invoice

13 outstanding receivables totalling \$8,876.00

Page 1 of 1

<input type="checkbox"/>	Tenant	Property	Building	Due On	Type	Amount Due	Days Late	Collected	Balance		
<input type="checkbox"/>	Chris James	409 Alpine Street	Building ABC1	Feb-04-2013	Security Deposit	\$1,521.00	119	\$0.00	\$1,521.00	Pay	
<input type="checkbox"/>	Chris James	409 Alpine Street	Building ABC1	Feb-04-2013	Rent	\$955.00	116	\$950.00	\$5.00	Pay	
<input type="checkbox"/>	Chris James	409 Alpine Street	Building ABC1	Apr-01-2013	Garage Fee	\$75.00	60	\$0.00	\$75.00	Pay	
<input type="checkbox"/>	Chris James	409 Alpine Street	Building ABC1	Apr-01-2013	Rent	\$950.00	60	\$0.00	\$950.00	Pay	
<input type="checkbox"/>	Chris James	409 Alpine Street	Building ABC1	May-01-2013	Garage Fee	\$75.00	30	\$25.00	\$50.00	Pay	
<input type="checkbox"/>	Chris James	409 Alpine Street	Building ABC1	May-31-2013	Miscellaneous	\$125.00	0	\$0.00	\$125.00	Pay	
Hide Lease											
<input type="checkbox"/>	Joe Namath	1010 Test Property *		May-09-2013	Key Replacement Fee	\$50.00	22	\$0.00	\$50.00	Pay	
Hide Lease											
<input type="checkbox"/>	John Smith	112 Alpine Street	East Block B	Jan-01-2013	Rent	\$1,200.00	150	\$0.00	\$1,200.00	Pay	
<input type="checkbox"/>	John Smith	112 Alpine Street	East Block B	Jan-01-2013	Application Fee	\$100.00	150	\$0.00	\$100.00	Pay	
<input type="checkbox"/>	John Smith	112 Alpine Street	East Block B	Feb-01-2013	Rent	\$1,200.00	119	\$0.00	\$1,200.00	Pay	
<input type="checkbox"/>	John Smith	112 Alpine Street	East Block B	Mar-01-2013	Rent	\$1,200.00	91	\$0.00	\$1,200.00	Pay	

Date Range Filtering

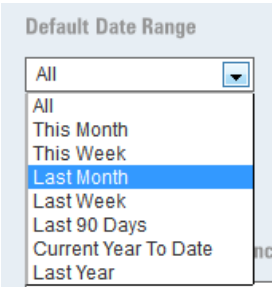
By default, the Payments Due screen shows “All” charges, but you can also display payments due just for the current month, current month, last month, last week, last 90 days, current year to date, or last year.

Select the date range you want in the **Show Payments Due** filter:

Show Payments Due: 

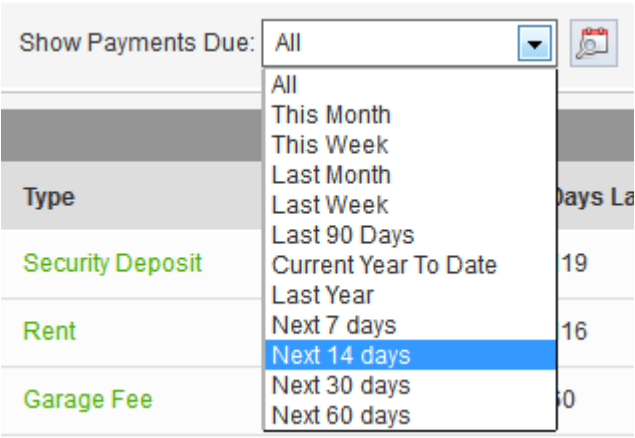
and click the filter button 

You can set the default date range that will be displayed here on the [Settings](#) screen:



Future Payments

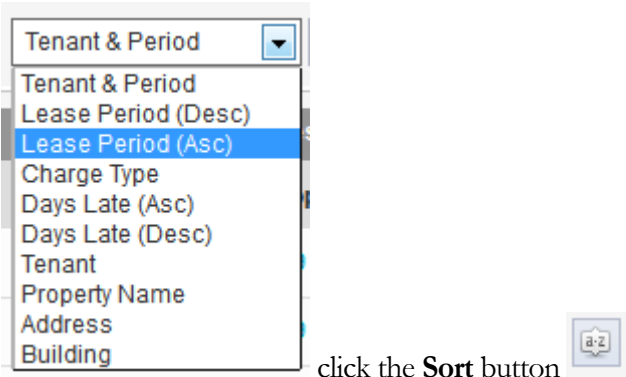
Also by default, the Payments Due page shows payments that **are currently due**. If you want to see **upcoming payments that are due in the near future**, select a future date range in the Show Payments Due filter:



Your future payment options include the next 7 days, next 14 days, next 30 days, and next 60 days.

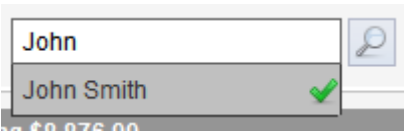
Sorting Payments

Payments due can be sorted by a number of different fields:



Tenant & Property Filtering

You can filter the Payments Due list to only show payments due for a specific tenant or property – just start typing a tenant name into the filter textbox:



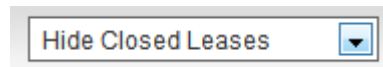
You can also search for a specific property name:



As you type, tenant or property suggestions will appear, based on the tenants and properties you have added – click a suggestion to filter the Payments Due list accordingly.

Open vs Closed Leases

By default, the Payments Due list shows open leases only. To view closed leases, click the drop down:



and select "Include Closed Leases".

Printing Current Payments Due List

To print the current list of payments due, click the **Print** button:

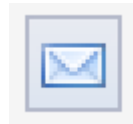


A report window will appear, where you can print or export the report to PDF:

Current Balance							ACME Properties LLC	
Tenant	Property	Building	Lease Period	Type	Due	Days Late	Collected	Balance
Joe Namath	1010 Test Street Palo Alto CA		May 09 2013	Key Replacement Fee	\$50.00	22	\$0.00	\$50.00
John Smith	112 Alpine Street #290 Palo Alto CA	East Block B	Jan 01 2013	Rent	\$1,200.00	150	\$0.00	\$1,200.00
John Smith	112 Alpine Street #290 Palo Alto CA	East Block B	Jan 01 2013	Application Fee	\$100.00	150	\$0.00	\$100.00
John Smith	112 Alpine Street #290 Palo Alto CA	East Block B	Feb 01 2013	Rent	\$1,200.00	119	\$0.00	\$1,200.00
John Smith	112 Alpine Street #290 Palo Alto CA	East Block B	Mar 01 2013	Rent	\$1,200.00	91	\$0.00	\$1,200.00
John Smith	112 Alpine Street #290 Palo Alto CA	East Block B	Apr 01 2013	Rent	\$1,200.00	60	\$0.00	\$1,200.00
John Smith	112 Alpine Street #290 Palo Alto CA	East Block B	May 01 2013	Rent	\$1,200.00	30	\$0.00	\$1,200.00

Email List (Attachment)

To convert the current list of payments due to a file attachment and automatically email it, click the **Email** button:



The **Send Email** screen appears, with the payments due list attached as a PDF file:

Send Email

Find or Enter Email Address:

Type a tenant, contact, or email address

To:

None

Cc:

None

Bcc:

None

Attached File:

BalancesList.pdf

Subject:

Body:

Hiding Payments Due

If you'd like to hide payments due for a specific tenant/property, click the **Hide Lease** button for that tenant:

Chris James

409 Alpine Street

Hide Lease

All payments due for that tenant & property will be hidden from the list – these payments are not cleared however, they are still considered due in the system and will impact overall balance calculations. These payments due will still appear on reports also. The main purpose for this feature is to temporarily hide payments due to

minimize screen “clutter” for payments that you don’t need to collect or work with right away.

When you’ve hidden payments due, you’ll see a link indicating so:

1 lease is hidden from the payments due list. Click to unhide it.

Click this link to reveal hidden payments.

Payments Due Comments

You can add comments to individual payment due items by clicking the comments button:



osit	\$1,521.00	119	\$0.00	\$1,521.00	Pay	
------	------------	-----	--------	------------	-----	--

The comments pane appears:

We contacted Chris about this item outstanding and he will come in to pay next week.

Save

Enter a comment and click **Save** when done. An item that has comments associated with it will show in yellow:

Generating Invoices

You can generate invoices for items currently due (and items due in the future) from the [Payments Due](#) page.

You can invoice every item currently due, items for a particular tenant, or just a single charge – it’s up to you.

To create an invoice, select the charges you want to appear by checking the box for that row:

13 outstanding receivables totalling \$8,876.00						
<input type="checkbox"/>	Tenant	Property	Building	Due On	Type	Amount D
<input checked="" type="checkbox"/>	Chris James	409 Alpine Street	Buildng ABC1	Feb-04-2013	Security Deposit	\$1,521.00
<input checked="" type="checkbox"/>	Chris James	409 Alpine Street	Buildng ABC1	Feb-04-2013	Rent	\$955.00
<input type="checkbox"/>	Chris	409 Alpine	Buildng	Apr-01-2013	Garage Fee	\$75.00

Here we have chosen to invoice a \$1521 Security Deposit and a \$955 Rent payment.

Next, click the **Generate Invoice** button:

Generate Invoice

The **Invoice Options** screen appears:

Invoice Options

Invoice Date: May-31-2013

Show Secondary Tenants: ☐

Start Invoice Numbers At:

Separate Invoices:

- ☒ For each primary tenant (default)
- ☐ For each primary tenant AND payment type
- ☐ For each amount due
- ☐ All items on one invoice

Return Address Options:

[Change how the return address appears on invoices, receipts & statements](#)

Comments for Invoice (optional, applied to all invoices):

Email Attachment Options:

- ☒ One file per tenant (default)
- ☐ One file for all tenants

Email Subject:

Email Body:

Email Invoice To Tenants

You can specify the **Invoice Date** that will appear on the invoice, and you can set the **Invoice Number** as well – invoice numbers will be incremented from this starting point if you are generating multiple invoices in one batch.

If you have leases that have secondary tenants, you can choose to include those names on the invoice as well – check the **Show Secondary Tenants** box to do so.

To add a comment to the invoice, enter it into the **Comments For Invoice** field. This comment is applied to all invoices generated in the batch.

By default, the system will use your [Billing Account](#) info as the return address on the Invoice – to override this, you can specify custom return address information – click the **Change how the return address appears...** link:

Change how the return address appears on invoices, receipts & statements

Return Address Fields

☐ Use My Billing Account Info
 ☒ Use the Field Values Below

Company Name	Address 1	Address 2
<input type="text" value="ACME LLC"/>	<input type="text" value="1234 Any Street"/>	<input type="text"/>
City	State/Province	Post Code
<input type="text" value="New York"/>	<input type="text" value="New York"/>	<input type="text"/>
Telephone	Cellular	Fax
<input type="text"/>	<input type="text"/>	<input type="text"/>
Email	Website	
<input type="text"/>	<input type="text" value="www.acme_llc.com"/>	

Save & Close

Select **Use the Field Values Below** and specify custom information. Select **Use My Billing Account Info** to revert back to the default settings.

The **Separate Invoices** setting allows you to control how the charges are grouped together on the invoice:

Separate Invoices:

☒ For each primary tenant (default)
 ☐ For each primary tenant AND payment type
 ☐ For each amount due
 ☐ All items on one invoice

The default selection is to have a separate invoice generated for each primary tenant – in most cases, this is all you’ll need.

If, for example, you wanted to have each charge type invoiced separately, you can do that – use the “for each primary tenant AND payment type” option. This means that if John Smith had charges for Rent and charges for Security Deposit, two invoices would be generated for him – one for each type.

You can also separate the invoices up by each individual amount (regardless of type), or you can combine every amount into one invoice, regardless of tenant. This last option is rarely used, but is useful if you wanted a duplicate record or journal entry of every item you’ve previously invoiced to your tenants.

Printing Invoices

After you have configured how you want the Invoice to appear, click **Print Invoice** to generate the invoice and display the report viewer screen:

Page 1 of 1 Pdf

ACME Properties LLC
 10101 W 81st St
 New York New York 1011
 Tel: 555 555 1111
 Email: support@123landlord.com

Invoice

May 31 2013

Chris James
 408 Alpine Street #31
 Palo Alto New South Wales

Telephone 403 555 9912

DUE ON	DESCRIPTION	AMOUNT DUE	COLLECTED	PLEASE PAY
Feb 04 2013	Security Deposit	\$1,521.00	\$0.00	\$1,521.00
Feb 04 2013	Rent	\$955.00	\$950.00	\$5.00
TOTAL				\$1,526.00

Comments

From here you can print the invoice or export it to PDF, which can be saved to your computer, emailed using your email software, etc.

Emailing Invoices

You can also use 123Landlord to email the invoice automatically, either directly to the tenant(s) on the invoice, or to other recipients.

On the **Invoice Options** screen, select how you want the email attachment to be sent:

Email Attachment Options:

☒ One file per tenant (default)
 ☐ One file for all tenants

You can specify a default email subject and body – this will be applied to all emails, but you can customize it on an per email basis as well later:

Email Subject:

Your invoice is attached!

Email Body:

Hello, please find your invoice attached...

Also select whether you want to email the invoice to tenants, or to other recipients:

Email Invoice
To Tenants

and click the **Email Invoice** button.

- Single Email Mode:

If you've selected **One File for All Tenants**, or the invoice has only been generated for one tenant, a single **Send Email** screen will appear:

Send Email

Find or Enter Email Address:

Type a tenant, contact, or email address

To: Cc: Bcc:

To:

Chris James [support@123landlord.com] ✖

Cc:

None

Bcc:

None

Attached File:

Invoice.pdf

Subject:

If you’ve specified that the invoice be sent **to tenants**, the tenant email address (if entered in the system) will be pre-selected as a recipient. The subject and body text will also be pre-filled if you’ve supplied them on the Invoice Options screen. If you’ve entered an Email Signature on the [My Account](#) page, the signature will be appended to the end of the email body.

If you’ve specified that **other recipients** receive the email, you will have to supply those email addresses here.

- Bulk (Batch) Email Mode:

If you’ve specified **One File Per Tenant** and the invoice has been generated for **multiple tenants**, the **bulk Send Document Batch** screen will appear, allowing you to send the appropriate invoice to each tenant, either individually, or in a mass batch send:

Send Document Batch

☐ Cc ☐ Bcc me on all emails, using this address: User Account: support@123landlord.com


Send All Emails

2 invoices ready to send

	Tenant	To:	Cc:	Bcc:	Subject	Details	Attachment	
	Chris James	support@123landlord.com					Invoice.pdf	<div><div>Send</div><div>✖</div></div>
	John Smith	support@123landlord.com					Invoice.pdf	<div><div>Send</div><div>✖</div></div>

Each tenant for which an invoice has been generated will appear as a row in this list.

If you specified that tenants will receive the email, their email addresses will be pre-filled here, if available. If you specified that other recipients will receive the email, you can supply those email addresses here.

Click the **Show More** button  to expand any row – this will display the details of each individual email message to be sent:

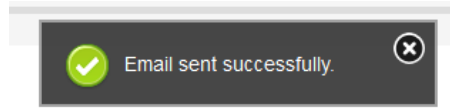
Email Message	
To:	<input type="text" value="support@123landlord.com"/>
	<small>Tip: separate email addresses with a comma.</small>
Subject:	<input type="text" value="Your invoice is attached!"/>
Body:	<input type="text" value="Hello, please find your invoice attached..."/>

You can completely customize each email message's recipients, subject, and body. Separate email addresses with a comma in the To: field. You can also add email addresses in the Cc: and Bcc: fields.

Click **Save Changes** when you are done customizing an email message.

When you are ready to send emails, you can click the **Send All Emails** button to send all messages automatically. They are sent as separate emails to the recipients as you have defined them – **each tenant or recipient will receive the individual invoice attachment that has been generated for each tenant.** You can click the Invoice.pdf hyperlink to preview the email attachment that will be sent for each tenant.

When the emails have been sent, the confirmation message appears:



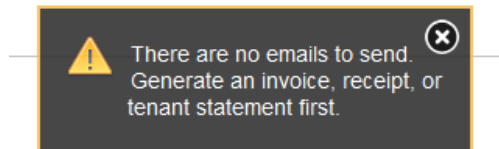
If you would like to only send a portion of the email messages displayed, click the blue

Send button for each individual row



Emails sent using this method are passed to a queue and are processed in the order they are received – depending on system load and the number of emails being sent by you and other 123Landlord users at that time, it may take seconds or minutes for your emails to be processed and sent. Report an issue to 123Landlord support staff if your emails do not arrive by the next day.

Note: if you wait too long to send your emails, or if you browse off this page and go back with the Back button on your browser, this page might have timed out – you'll see this message:



The data on this page is valid for about 15-20 minutes. This message means you will have to go back and generate your document batch again, whether it was the Invoice, Receipt, or Tenant Statement.

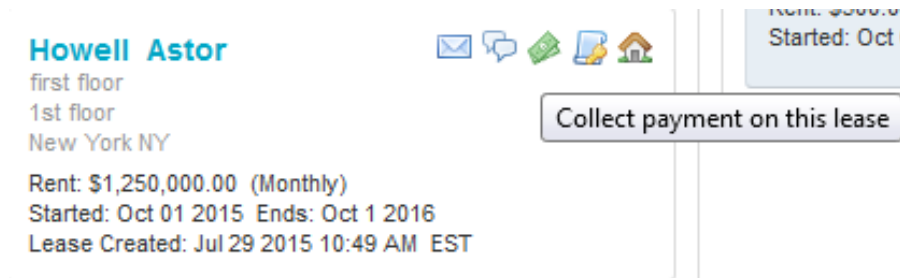
Collecting Payments

There are three ways to collect payments in 123Landlord. The slower, more manual method offers more control over the finer details of the payment and how it is filed, whereas the fastest, most automated method “assumes” more and you lose a bit of control over certain details on a per-payment level, but allows you to collect dozens (if not hundreds) of payments with just a couple of clicks.

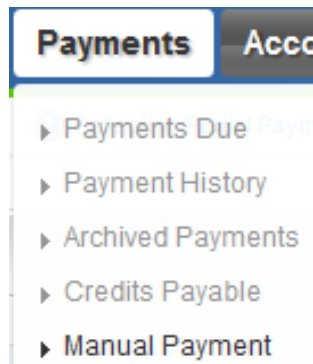
Here’s more information about all three methods. Usually we recommend Method #2, which is a good balance between speed and accuracy, but there are certain scenarios when the other methods are warranted.

Method #1: Dashboard or Manual Payment

The Collect Payment page is accessed by hovering over the Dollar sign icon :



Or alternatively, Select the Payments → Manual Payment option



The screen reloads, showing the **Payment Details** pane:

Payment Details		
Type Rent	For Period Jun-01-2013	Amount Received 950
Received On May-31-2013	Method Check	<input type="checkbox"/> Flag period as fully paid
Check / Money Order / EFT # [Empty Field]		
Comment [Empty Text Area]		

Specify the **Type** of the payment you want to collect. You can choose from the existing list of rent and non-rent payment types.

Type
Rent

You should also select the period/due date the payment is to be allocated to in the **For Period** field. This field contains a list of the same payment periods that were generated when you created the lease in 123Landlord. You can collect payments that aren't technically due yet just by selecting a future period from this list.

For Period
Jun-01-2013

If you are collecting payments to be applied against amounts owing, it is important to select the same type as the type of the balance/charge amount showing on the payments due page. It is also important that the proper period be selected. For example, if a tenant has \$1000 owing on the payments due screen for "Rent", for the period of Mar 1 2013, any payments collected should have the same type and period, in order to be applied accordingly.

Enter the amount you wish to collect in the **Amount Received** field:

Amount Received	
<input type="text" value="950"/>	<input type="checkbox"/> Flag period as fully paid

You should also specify the **Received On** date, **Method** (check, cash, ACH, etc.), and reference # (**Check #, Money Order, EFT #**)

Received On	Method	Check / Money Order / EFT #
<input type="text" value="May-31-2013"/> ▼	<input type="text" value="Check"/> ▼	<input type="text"/>

A **Comment** can also be entered:

Comment
<input type="text"/>

Optional: Simultaneous Late Fee Payment

If Late Fees are enabled for the lease, you can also record a separate payment for the late fee **in addition to the original rent payment you are collecting**, if the payment is late. This will create a second payment, separate from your Rent payment.

When you select the period due date in the **For Period** field, the system will determine if a late fee is necessary or not based on the amounts collected for that due date and the lateness of the payment (from the current date), etc.

It will also try and calculate the right amount for the late fee, based on your late fee settings and how late this payment is:

Late Fee Options		
Add Late Fee Payment <input checked="" type="checkbox"/>	Late Fee Amount Received <input type="text" value="35"/>	<input checked="" type="checkbox"/> This payment satisfies the late fee (stops calculating fees for this due date)

You can choose to make changes to the late fee amount and collect it also (leaving the **Add Late Fee Payment** box checked), or you can un-check this box and a late fee payment will not be added.

If you choose to collect the late fee, you can leave this box checked to close off the late fee:

☒ **This payment satisfies the late fee (stops calculating fees for this due date)**

This means that this late fee payment satisfies the late fee requirement in full **for this period**, and no more late fees will be calculated or due for this tenant and due date.

If Late Fees are not enabled for the lease, you will see the following panel, and will not be able to record a simultaneous late fee.

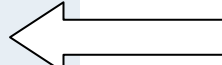
Late Fees - Disabled for this Lease

Note that simultaneous late fee payments can only be added onto **Rent** payments.

If you'd like to flag the period as 'fully paid' – check the box to indicate it:

Amount Received

☐ Flag period as fully paid



If you check this box, no more payments will be required from the tenant for this due date. If you are collecting the full amount owed for this payment, the due date will be considered fully paid anyways, so you would normally only need to check this box if you are discounting the amount due for this period, but want to indicate that the amount received is sufficient. This will allow you to collect an amount lower than what is due, but the system will not continue to show a balance owing for the period.

See [Discounting Payments](#) for more info.

When your payment is collected, the system will normally file income accounting entries to match the payment. You should verify that the payment is being filed under the correct [Account and/or Sub-Account](#):

Accounts

Payment	Late Fee
Account Rent Income	Account Late Fees
Sub-Account None	Sub-Account None

Account & sub-account settings will be remembered for your next payment.

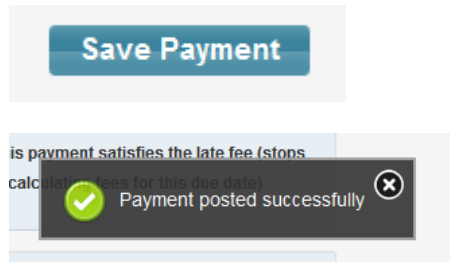
Accounting Period
None

Also specify the right Accounting Period, if you have set them up on the [Admin screen](#). This ensures your accounting entries are filed under the right fiscal period, which makes your reporting more intuitive.

A separate income accounting entry will be filed for the simultaneous late fee payment, if one was specified.

If you don't see any account codes here and the fields are disabled, read why in [Where Are My Accounting Entries?](#)

If everything is set the way you want it for the payment, click **Save Payment**:

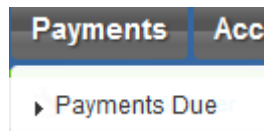


The payment will be applied to amounts owing (if applicable) for the period and type you've specified. The payment will be filed in the [Payment History](#) page, and (if specified) accounting entries will be created for the incoming amount(s).

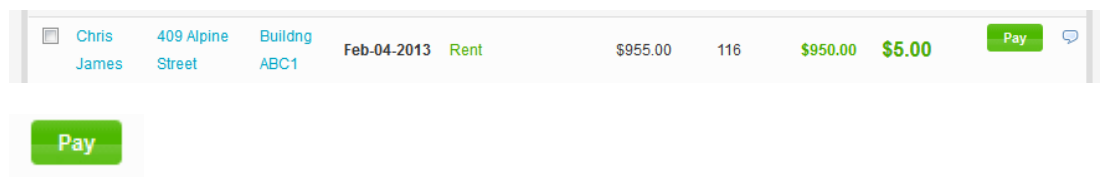
Method #2: Quick Pay Panel

While Method 1 requires manual data entry, this method is much faster and more streamlined.

Go to the **Payments Due** page:



For the amount and type you want to collect, click the green **Pay** button:



The charge row expands, and displays the Quick Pay panel:

Post payment from Chris James at 409 Alpine Street for Feb-04-2013 (Security Deposit)				
Amount	Received On	Method	Check #	Comment
<input type="text" value="1521"/>	<input type="text" value="May-31-2013"/>	<input type="text" value="Check"/> ▼	<input type="text"/>	<input type="text"/>
		<input type="button" value="Post"/>		
More Payment Options		Accounting entry to be filed under: Rent Income		

The amount owing is pre-filled in the **Amount** received field; you can override it and collect a partial amount if you wish. If you collect a partial amount, a balance owing will be calculated and the charge will be kept open on the Payments Due page, until you collect the amount in full (with subsequent payments as you receive them).

You can specify the **Received On** date, the payment **Method** (check, cash, etc.), the reference or **Check #**, and a **Comment**.

If an Account code has been synced with this payment type (for instance, normally a payment type of **Rent** is synced with the account code **Rent Income**), it will appear here:

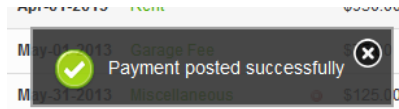
Accounting entry to be filed under: Rent Income
--

If you need to specify the account code for the payment, or to modify any other particulars about the payment not accessible from the Quick Pay panel, click the **More Payment Options** link and this will navigate you to the [Collect Payment](#) page, where you can enter the payment in a more deliberate manner.

Otherwise, if your payment is configured the way you need it to be, click the green **Post** button to save the payment:

<input type="button" value="Post"/>

This creates a payment record that matches the type and due date of the associated charge:



If the associated charge was paid in full by this payment, the charge will be cleared from the Payments Due screen. If this was a partial payment, and there is still a balance owing on the associated charge, it will remain on the Payments Due screen, but the payment will be reflected in the **Collected** column (and the **Balance** updated).

An entry will be created on the [Payment History](#) tab, and an income accounting entry (if an account code was specified) will be created to match the payment.

And that's it! You can repeat this process for each payment you're collecting – just find the charge you wish to apply money received toward, click the green **Pay** button, verify the particulars of the payment, and click **Post**.

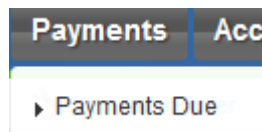
Paying Charges Not Due Yet

To collect payments that technically aren't due yet, first you need to display them on the Payments Due screen in order to use the Quick Pay method. To display future payments, use the **Show Payments Due** filter and select a date range in the future. [More info](#) Then collect the payments using the Quick Pay panel, as described above.

Method #3: Bulk Payments

With this method, it extends the Quick Method a bit farther. Using Bulk payments, you can automatically collect any number of payments showing the Payments Due list with one process.

Here's how it is done – select **Payments** → **Payments Due**:



You'll see the list of outstanding payments. You'll need to specify which payments you're collecting. To do so, check the box next to the payments you wish to auto-collect:

7 outstanding receivables totalling \$4,812.50						
<input type="checkbox"/>	Tenant	Property	Building	Due On	Type	Amount Due
<input checked="" type="checkbox"/>	Chris James	409 Alpine Street	Building ABC1	May-31-2013	Miscellaneous	\$125.00
<input checked="" type="checkbox"/>	Chris James	409 Alpine Street	Building ABC1	Jun-01-2013	Garage Fee	\$75.00
Hide Lease						
<input type="checkbox"/>	Mark Jones	1010 Test Property		Jun-10-2013	Rent	\$1,000.00
Hide Lease						
<input checked="" type="checkbox"/>	Joe Namath	1010 Test Property *		Jun-15-2013	Garage Fee	\$12.50
<input type="checkbox"/>	Joe Namath	1010 Test Property *		Jun-15-2013	Rent	\$1,200.00
<input type="checkbox"/>	Joe Namath	1010 Test Property *		Jun-15-2013	Security Deposit	\$1,200.00

Again, you can select as little or as many payments as you want.

If you need to make adjustments the payments, click a payment row to expand it. You can override the payment amount, the received date, payment method, etc. just as you would do so if you were collecting a single payment. If you want to enter a check # or comment about the payment, this is where you do it.

<input checked="" type="checkbox"/>	Chris James	409 Alpine Street	Building ABC1	Jun-01-2013	Garage Fee	\$75.00										
<div>Post payment from Chris James at 409 Alpine Street for Jun-01-2013 (Garage Fee)</div> <table> <tr> <th>Amount</th> <th>Received On</th> <th>Method</th> <th>Check #</th> <th>Comment</th> </tr> <tr> <td><input type="text" value="75"/></td> <td><input type="text" value="May-31-2013"/></td> <td><input type="text" value="Check"/></td> <td><input type="text"/></td> <td><input type="text"/></td> </tr> </table> <div> More Payment Options <div>Accounting entry to be filed under: Rent Income</div> </div>							Amount	Received On	Method	Check #	Comment	<input type="text" value="75"/>	<input type="text" value="May-31-2013"/>	<input type="text" value="Check"/>	<input type="text"/>	<input type="text"/>
Amount	Received On	Method	Check #	Comment												
<input type="text" value="75"/>	<input type="text" value="May-31-2013"/>	<input type="text" value="Check"/>	<input type="text"/>	<input type="text"/>												

(If you don't need to make any adjustments to the payments before you collect them, and **wish to collect the full amounts**, and for a **received date of today**, then you don't need to worry about the last step, just check the boxes for the payments you're collecting...)

Next, click the **Multipay** button:



You'll see the following notice:

All checked payments will be automatically collected based on the amounts, received dates, and other information you have specified. If configured, an accounting (income) entry will also be recorded for each payment. Note that only payments marked with a checked box will be auto-collected. Continue?

Click OK to continue, and the auto-save process will commence. When complete, a message will appear:



And that's it - you're done! The payments will be automatically collected, and (if applicable) an income accounting entry will be recorded for each payment. If the payments have been collected in full, they will of course clear from the payments due list. All payments will be recorded in the [Payment History](#) tab.

Associated Accounting Entries

Whenever payments are collected in the system, income accounting entries will be saved (if the payment had an associated account and (optionally) a sub-account linked to it.


Note that when a payment is opened (from the Payment History), edited, and re-saved, the corresponding accounting entry is not synchronized. You should adjust corresponding accounting entries to match your updated payment, to make sure your profit & loss and your accounting entry reports match your payment history totals.

Also note that when a payment is deleted, no accounting entries are automatically deleted – you should do this manually as well.


Partial Payments

The system will allow you to collect a partial payment – just enter any amount between zero and the amount due for that line item.

When you enter a partial payment, 123Landlord will keep track of the remaining balance owing on a per due date basis. Balances owing (or credits) will always be shown on the [Payments Due](#) page:

Amount Due	Days Late	Collected	Balance	
\$950.00	3	\$495.00	\$455.00	Pay 

on individual Tenant Detail pages ([Charges & Balance tab](#))...

Current Charges & Balance							\$1,770.00
Jun 01 2013	\$950.00	\$495.00	\$455.00	\$0.00 (3)	\$0.00	\$0.00	\$455.00 
Payment: May 31 2013		\$495.00	Rent	Check	Ref#:		

... and of course on any generated Statements and rent roll reports.

You can also enter an amount **higher** than what is required – in the case of any overpayment, the system will calculate a credit - credit amounts are often shown in parentheses in the system, eg. (\$1500). Note that in most cases you should apply any funds available to the payment types and periods that can be paid at that time.

For example, if you have a tenant that shows three payments due in the system:

RENT	\$1500
GARAGE FEE	\$75
PARKING FEE	\$25

and you receive a check payment for **\$1550**, rather than posting the payment in full to RENT and having a credit owing there, you should probably apply \$1500 of it towards RENT, and the remaining \$50 towards another payment or even another period due date. In this case we could apply \$50 towards the GARAGE FEE, and the tenant would owe the remaining \$25 for that charge.

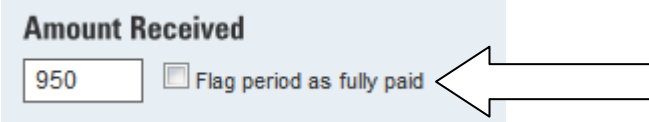
Some organizations like to do the opposite – that is, they prefer to post all receivables into the payment type it was intended for – so in the case they would post the full amount received into RENT (showing a credit/overage) and the other type GARAGE FEE would still owe in full.

At the end of the day it comes down to what your accounts receivable policies are, and how you wish to record your transactions in the system.

Discounting Payments

When you are collecting payments, you have the option of entering an amount less than what it is owed and having the system accept this amount as enough to satisfy the payment period. This effectively means you are ‘forgiving’ or ‘discounting’ that period’s amount due, and flagging the period as fully paid.

To accept a discounted payment and flag the period as ‘fully paid’, collect it on the Collect Payment screen – check the box to indicate it:



Amount Received

☒ Flag period as fully paid

This means that to discount a payment you must use the more [manual method](#) on the Collect Payment screen to collect the payment – this option is not available from the [Quick Pay panel](#) or the [Bulk Pay method](#).

If you check this box, no more payments will be required from the tenant for this due date. This will allow you to collect an amount lower than what is due, but the system will not continue to show a balance owing for the period.

Note: If you are collecting the full amount owed for this payment, the due date will be considered fully paid anyways, so you would normally only need to check this box if you are discounting the amount due for this period, but want to indicate that the amount received is sufficient.

Generating Receipts

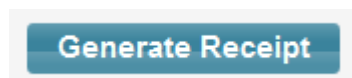
After you've collect a payment, you can generate a receipt for it with just a couple of clicks.

All payments for which a receipt can be printed are displayed on the [Payment History](#) screen – just check the box for each one you want to appear on the receipt:

8 payments totalling \$5,495.00				
<input type="checkbox"/>	Received	Type	Amount	Due Date
<input checked="" type="checkbox"/>	May-31-2013	✓ Rent	\$949.00	Jun-01-201
<input checked="" type="checkbox"/>	May-07-2013	✓ Rent	\$950.00	May-01-201
<input type="checkbox"/>	May-07-2013	Garage Fee	\$25.00	May-01-201
<input checked="" type="checkbox"/>	May-28-2013	Garage Fee	\$75.00	Mar-09-201

Here we have chosen to generate a receipt for two rent payments and a garage fee payment.

Next, click the **Generate Receipt** button:



The **Invoice Options** screen appears:

Receipt Options

☐ Show Secondary Tenants

Separate Receipts:

☒ For each primary tenant (default)

☐ For each primary tenant AND payment type

☐ For each payment

☐ All items on one receipt

Return Address Options:

[Change how the return address appears on invoices, receipts & statements](#)

Comments for Receipt (optional, applied to all receipts):

Email Attachment Options:

☒ One file per tenant (default) ☐ One file for all tenants

Email Subject:

Email Body:

Email Receipt

To Tenants

Print Receipt

If you have leases that have secondary tenants, you can choose to include those names on the receipt as well – check the **Show Secondary Tenants** box to do so.

To add a comment to the receipt, enter it into the **Comments For Receipt** field. This comment is applied to all receipts generated in the batch.

By default, the system will use your [Billing Account](#) info as the return address on the receipt – to override this, you can specify custom return address information – click the **Change how the return address appears...** link:

Change how the return address appears on invoices, receipts & statements

Return Address Fields

☐ Use My Billing Account Info
 ☒ Use the Field Values Below

Company Name	Address 1	Address 2
<input type="text" value="ACME LLC"/>	<input type="text" value="1234 Any Street"/>	<input type="text"/>
City	State/Province	Post Code
<input type="text" value="New York"/>	<input type="text" value="New York"/>	<input type="text"/>
Telephone	Cellular	Fax
<input type="text"/>	<input type="text"/>	<input type="text"/>
Email	Website	
<input type="text"/>	<input type="text" value="www.acme_llc.com"/>	

Save & Close

Select **Use the Field Values Below** and specify custom information. Select **Use My Billing Account Info** to revert back to the default settings.

The **Separate Receipts** setting allows you to control how the charges are grouped together on the receipt:

Separate Receipts:

- ☒ For each primary tenant (default)
- ☐ For each primary tenant AND payment type
- ☐ For each payment
- ☐ All items on one receipt

The default selection is to have a separate receipt generated for each primary tenant – in most cases, this is all you’ll need.

If, for example, you wanted to have each charge type documented separately, you can do that – use the “for each primary tenant AND payment type” option. This means that if John Smith had payments for Rent and payments for Security Deposit, two receipts would be generated for him – one for each type.

You can also separate the receipts up by each individual payment (regardless of type), or you can combine every amount into one receipt, regardless of tenant. This last option is rarely used, but is useful if you wanted a duplicate record or journal entry of every item you’ve previously received from your tenants.

Printing Receipts

After you have configured how you want the Receipt to appear, click **Print Receipt** to generate the receipt and display the report viewer screen:

ACME Properties LLC
 10101 W 81st St
 New York New York 1011
 Tel: 555 555 1111
 Email: support@123landlord.com

Receipt

Jun 04 2013

Chris James
 408 Alpine Street #31
 Palo Alto New South Wales

Telephone 403 555 9912 403 555 9218

RECEIVED	DUE DATE	REF #	TYPE	PAID
May 28 2013	Mar 09 2013		Garage Fee	\$75.00
May 07 2013	May 01 2013		Rent	\$950.00
May 31 2013	Jun 01 2013		Rent	\$495.00
TOTAL				\$1,520.00

Comments

From here you can print the receipt or export it to PDF, which can be saved to your computer, emailed using your email software, etc.

Emailing Receipts

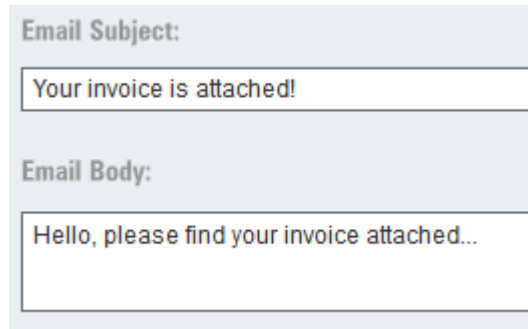
You can also use 123Landlord to email the receipt automatically, either directly to the tenant(s) on the receipt, or to other recipients.

On the **Receipt Options** screen, select how you want the email attachment to be sent:

Email Attachment Options:

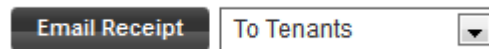
☒ One file per tenant (default)
☐ One file for all tenants

You can specify a default email subject and body – this will be applied to all emails, but you can customize it on an per email basis as well later:



The screenshot shows a light blue bordered box containing two sections. The top section is labeled 'Email Subject:' and contains a text input field with the value 'Your invoice is attached!'. The bottom section is labeled 'Email Body:' and contains a text input field with the value 'Hello, please find your invoice attached...'.

Also select whether you want to email the receipt to tenants, or to other recipients:



The screenshot shows a dark grey button labeled 'Email Receipt' next to a dropdown menu. The dropdown menu is open, showing the text 'To Tenants' and a downward arrow icon.

and click the **Email Receipt** button.

- Single Email Mode:

If you've selected **One File for All Tenants**, or the receipt has only been generated for one tenant, a single **Send Email** screen will appear:

Send Email

Find or Enter Email Address:

To:

Cc:

Bcc:

To:
None

Cc:
None

Bcc:
Chris James [chris@123landlord.com] ✖

Attached File:
[ReceiptForPayment.pdf](#)

Subject:

If you've specified that the receipt be sent **to tenants**, the tenant email address (if entered in the system) will be pre-selected as a recipient. The subject and body text will also be pre-filled if you've supplied them on the Receipt Options screen. If you've entered an Email Signature on the [My Account](#) page, the signature will be appended to the end of the email body.

If you've specified that **other recipients** receive the email, you will have to supply those email addresses here.

- Bulk (Batch) Email Mode:

If you've specified **One File Per Tenant** and the receipt has been generated for **multiple tenants**, the **bulk Send Document Batch** screen will appear, allowing you to send the appropriate receipt to each tenant, either individually, or in a mass batch send:

Send Document Batch

☐ Cc ☐ Bcc me on all emails, using this address: User Account: support@123landlord.com

Send All Emails

2 receipts ready to send

Page 1 of 1

Tenant	To:	Cc:	Bcc:	Subject	Details	Attachment
Chris James	chris@123landlord.com					Receipt.pdf <div>Send</div> <div>✕</div>
Joe Namath	joe.namath@nfl.com					Receipt.pdf <div>Send</div> <div>✕</div>

Each tenant for which an invoice has been generated will appear as a row in this list.

If you specified that tenants will receive the email, their email addresses will be pre-filled here, if available. If you specified that other recipients will receive the email, you can supply those email addresses here.

Click the **Show More** button to expand any row – this will display the details of each individual email message to be sent:

Email Message

To:

chris@123landlord.com

Cc:

Tip: separate email addresses with a comma.

Subject:

Your receipt is attached

Body:

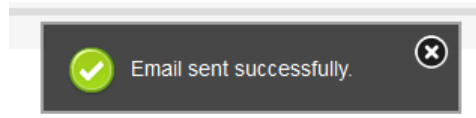
Hello please find your attached receipt - thanks for your payment

You can completely customize each email message's recipients, subject, and body. Separate email addresses with a comma in the To: field. You can also add email addresses in the Cc: and Bcc: fields.

Click **Save Changes** when you are done customizing an email message.

When you are ready to send emails, you can click the **Send All Emails** button to send all messages automatically. They are sent as separate emails to the recipients as you have defined them – **each tenant or recipient will receive the individual receipt attachment that has been generated for each tenant.** You can click the Receipt.pdf hyperlink to preview the email attachment that will be sent for each tenant.

When the emails have been sent, the confirmation message appears:



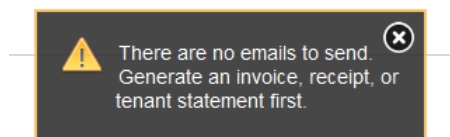
If you would like to only send a portion of the email messages displayed, click the blue

Send button for each individual row



Emails sent using this method are passed to a queue and are processed in the order they are received – depending on system load and the number of emails being sent by you and other 123Landlord users at that time, it may take seconds or minutes for your emails to be processed and sent. Report an issue to 123Landlord support staff if your emails do not arrive by the next day.

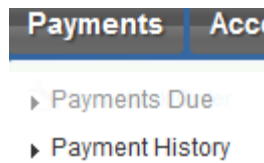
Note: if you wait too long to send your emails, or if you browse off this page and go back with the Back button on your browser, this page might have timed out – you'll see this message:



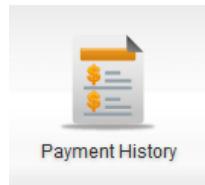
The data on this page is valid for about 15-20 minutes. This message means you will have to go back and generate your document batch again, whether it was the Invoice, Receipt, or Tenant Statement.

Payment History

When you collect payments in 123Landlord, they will be filed in the Payment History page – to view it, hover over the **Payments Button**, and click **Payment History**:



You can also use the **Payment History** button on the [Dashboard](#):



The **Payment History** page loads:

Payments - All Tenants Hide Closed Leases Payments Due Payment History

Lease Period (Desc) 🔍 🔍 Received: All 📅 Generate Receipt 🖨️ ✉️

9 payments totalling \$5,091.00 Page 1 of 1

<input type="checkbox"/> Received	Type	Amount	Due Date	Method	Check #	Tenant	Property	Building	
<input type="checkbox"/> May-31-2013 ✓	Rent	\$495.00	Jun-01-2013	⇅	Check	Chris James	409 Alpine Street	Building ABC1	Edit ✖
<input type="checkbox"/> Jun-04-2013 ⚠	Key Replacement Fee	\$50.00	May-09-2013	⇅	Check	Joe Namath	1010 Test Property *		Edit ✖
<input type="checkbox"/> May-07-2013 ✓	Rent	\$950.00	May-01-2013	⇅	Check	Chris James	409 Alpine Street	Building ABC1	Edit ✖
<input type="checkbox"/> May-07-2013	Garage Fee	\$25.00	May-01-2013	⇅	Check	Chris James	409 Alpine Street	Building ABC1	Edit ✖
<input type="checkbox"/> May-28-2013	Garage Fee	\$75.00	Mar-09-2013	⇅	Check	Chris James	409 Alpine Street	Building ABC1	Edit ✖
<input type="checkbox"/> May-28-2013 ✓	Rent	\$950.00	Mar-09-2013	⇅	Check	Chris James	409 Alpine Street	Building ABC1	Edit ✖
<input type="checkbox"/> May-31-2013	Security Deposit	\$1,521.00	Feb-04-2013	⇅	Check	Chris James	409 Alpine Street	Building ABC1	Edit ✖
<input type="checkbox"/> May-28-2013	Garage Fee	\$75.00	Feb-04-2013	⇅	Check	Chris James	409 Alpine Street	Building ABC1	Edit ✖
<input type="checkbox"/> May-28-2013 ✓	Rent	\$950.00	Feb-04-2013	⇅	Check	Chris James	409 Alpine Street	Building ABC1	Edit ✖

Archive Delete Displaying all records sorted by Lease Period (Desc) (desc) Total Paid: \$5,091.00

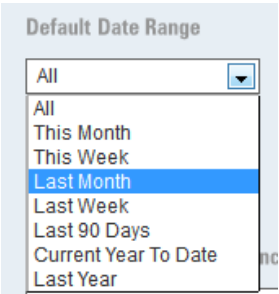
Date Range Filtering

By default, the Payment History screen shows “All” payments received, but you can also display payments just for the current month, current month, last month, last week, last 90 days, current year to date, or last year.

Select the date range you want in the **Received** filter:

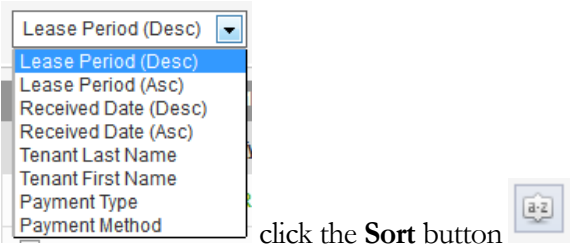
Received: All ▼ 🔍 and click the filter button 🔍

You can set the default date range that will be displayed here on the [Settings](#) screen:



Sorting Payments

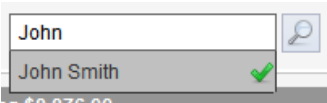
Payment History can be sorted by a number of different fields:



click the **Sort** button

Tenant & Property Filtering

You can filter the Payment History list to only show payments received for a specific tenant or property – just start typing a tenant name into the filter textbox:



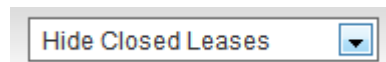
You can also search for a specific property name:



As you type, tenant or property suggestions will appear, based on the tenants and properties you have added – click a suggestion to filter the Payment History list accordingly.

Open vs Closed Leases

By default, the Payment History list shows open leases only. To view closed leases, click the drop down:



and select “Include Closed Leases”.

Printing Payment History List

To print the current list of payments received, click the **Print** button:



A report window will appear, where you can print or export the report to PDF:

Payment History						ACME Properties LLC		
Received	Type	Amount	Lease Period	Method	Check #	Tenant	Property	Building
May 31 2013	Rent	\$495.00	Jun 01 2013	Check		Chris James	409 Alpine Street	Building ABC1
Jun 04 2013	Key Replacement Fee	\$50.00	May 09 2013	Check		Joe Namath	1010 Test Property *	
May 07 2013	Rent	\$950.00	May 01 2013	Check		Chris James	409 Alpine Street	Building ABC1
May 07 2013	Garage Fee	\$25.00	May 01 2013	Check		Chris James	409 Alpine Street	Building ABC1
May 28 2013	Garage Fee	\$75.00	Mar 09 2013	Check		Chris James	409 Alpine Street	Building ABC1
May 28 2013	Rent	\$950.00	Mar 09 2013	Check		Chris James	409 Alpine Street	Building ABC1
May 31 2013	Security Deposit	\$1,521.00	Feb 04 2013	Check		Chris James	409 Alpine Street	Building ABC1
May 28 2013	Garage Fee	\$75.00	Feb 04 2013	Check		Chris James	409 Alpine Street	Building ABC1
May 28 2013	Rent	\$950.00	Feb 04 2013	Check		Chris James	409 Alpine Street	Building ABC1

Email List (Attachment)

To convert the current list of payments received to a file attachment and automatically email it, click the **Email** button:



The **Send Email** screen appears, with the payment history list attached as a PDF file:

Send Email

Find or Enter Email Address:

Type a tenant, contact, or email address

To:None

Cc:None

Bcc:None

Attached File:
PaymentList.pdf

Subject:

Body:

Archiving Payments

Over time, the Payment History list will grow long and cluttered, as more and more payments are recorded. You can minimize this by setting your default date range filter (on the Settings screen) to be something reasonably limiting, such as all payments received in the **Last Month**, for example – this will keep your backlog of payments relatively small.

Another way to clear out old payments from the main Payment History view is to simply **archive** them. To archive payments just means to file them away in a separate master list, keeping only the most current payments in the main list.

To archive any payments, first check their box to select them:

<input checked="" type="checkbox"/>	May-28-2013	Garage Fee	\$75.00	Mar-09-2013	⬆️⬆️
<input checked="" type="checkbox"/>	May-28-2013	✓ Rent	\$950.00	Mar-09-2013	⬆️⬆️
<input checked="" type="checkbox"/>	May-31-2013	Security Deposit	\$1,521.00	Feb-04-2013	⬆️⬆️

Then, click the **Archive** button at the very bottom of the Payment History page:

<input type="checkbox"/>	May-28-2013	✓ Rent	\$950.00	Feb-04-2013	⬆️⬆️	Check
<div> Archive Delete </div>						Displaying all records sorted by Lease Period (Desc) (desc)

A confirmation prompt will appear (click OK):

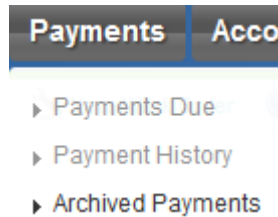
All payments you have checked will be moved to the Archived Payments list. Continue with archive?

<div> OK Cancel </div>
--

When payments are archived, a notice appears at the bottom of the list:

Displaying all records sorted by Lease Period (Desc) (desc) Some records have been archived. Show all 3 archived payments.

Click the “Show all X archived payments” link to display the **Archived Payments** list – you can also view this list by selecting Payments → Archived Payments:



The list is similar to the main Payment History list, except it contains archived payments:

Archived Payment History									
Hide Closed Leases									
Lease Period (Desc) [v] [a] [i] [e] Received: All [v] [a] [e] Generate Receipt [i] [e]									
3 archived payments totalling \$2,546.00 Page 1 of 1									
Received	Type	Amount	Lease Period	Method	Check #	Tenant	Property	Building	
May-28-2013	Garage Fee	\$75.00	Mar-09-2013	Check		Chris James	409 Alpine Street	Building ABC1	Edit X
May-28-2013	Rent	\$950.00	Mar-09-2013	Check		Chris James	409 Alpine Street	Building ABC1	Edit X
May-31-2013	Security Deposit	\$1,521.00	Feb-04-2013	Check		Chris James	409 Alpine Street	Building ABC1	Edit X
Unarchive Delete Displaying all records sorted by Lease Period (Desc) (desc) This list shows payments that have been archived. Click to go back to your working set of payments.									
Total Paid: \$2,546.00									

You can also un-archive payments to remove them back to the main payment history list:

Unarchive	Delete	Displaying all records sorted by Lease Period (Desc) (desc) This list shows payments that have been archived. Click to go back to your working set of payments.
---------------------------	------------------------	--

Credits Payable

These are amounts that are intended to be returned back to the tenant, and could include things like security deposit re-payment, credits for services rendered, refunds, or other similar payments.

1. The first step is to add the credit on the tenant's account. This happens on the Lease Edit screen, the same place that you'd set up the lease terms and add

Other Charges. Select the **Other Charges & Credits** tab - add a new credit in the "Credits" section:

Reason / Comment	Type	Amount	Credited On	Add
Refund tenant overpayment	Refund	125.00	Apr-10-2014	

- Enter the particulars of the credit, including the type, a comment, and the amount. Also indicate when the credit is to be issued and on the books (credited on date).
- Click the ADD button and don't forget to scroll up and click SAVE LEASE.

With the Credit added, it will now be visible on the Payments → Credits Payable screen:

Credits - All Tenants						
Tenant & Period				Show Credits Payable: All		
1 outstanding payable credits totalling 125.00 AED						
<input type="checkbox"/>	Tenant	Property	Building	Credited On	Type	Comment
<input type="checkbox"/>	Joe Brown	TEST1234	ACME Overload	Apr-10-2014	Refund	Refund tenant overpaymer
Displaying all records sorted by Tenant & Period						

Posting a Credit Payable

To post a credit payable you can select one or more entries using the check boxes (just like on the Payments --> Payments Due screen) and use the Multi-Pay button to "automatically pay & post the selected credits", or you can click the green Pay button to pay a line item individually:

Post payment to Joe Brown at TEST1234 for Apr-10-2014 (Refund)				
Amount	Paid On	Method	Check #	Comment
<input type="text" value="125"/>	<input type="text" value="Apr-13-2014"/>	<input type="text" value="Check/Debit Card"/>	<input type="text" value="112"/>	<input type="text" value="Paid"/>
Accounting entry to be filed under:				
<input type="text" value="Other Expenses"/>				

The Post Payment panel appears, and you can enter the details of the exact date the credit was paid out the tenant, including the amount (you can enter a partial amount if the credit is to be paid with multiple transactions or checks, etc.), method of payment, and reference/check #. Enter a comment for your own reference.

When credit payments are posted, an expense accounting entry is filed in the accounting ledger as well - this represents the corresponding debit from your operating account and can have any expense account (GL) code you wish to tag it with.

Click POST and the payment is processed. The credit payment will then be displayed on the Credit Payment history tab, which is the same as the tenant payment history tab except this list is just payments that have been issued back out to tenants

All Credits (paid in full or otherwise) will appear on the Tenant Detail screen → Charges & Balance tab:

Credits					
Orig Credited On	Type	Credit Amount	Amount Paid to Tenant	Balance	Pmts
Apr 10 2014	Refund	125.00- AED	125.00 AED	0.00 AED	⬆
Total		125.00- AED	125.00 AED	0.00 AED	

Where Are My Accounting Entries?

Often, we'll get questions about missing accounting entries, or why the amounts for the payments received don't seem to match the amounts on the income accounting reports. Here's the culprit, in most cases:

No Account Codes Assigned to Rental Payments

When you first set up your 123Landlord account, there might not be any account codes added to the account, so the system doesn't assign any accounting entries to incoming payments.

This is what you'll see if you go to the Admin page / Accounting tab (no account codes):

Administration

Accounting Periods

Accounting entries roll up to accounting periods for reporting p

Period Name	Start Date	End Date
No accounting periods		

Accounting Codes

Account codes are useful to categorize accounting entries (incomes/expenses

Name	Description	GL Code	Type	Sub-Acc
No account codes				

Add Standard Account Codes

You can add a standard set of account codes by clicking the blue button, or you can add your own custom ones.

So without these codes, you'll see this when you click Payments → Payments Due and then click the green "Pay" button ([Method #2 above](#)):

Nov-01-2012 (Rent)			
Method	Check #		
Check <input type="button" value="v"/>	<input type="text"/>		
Accounting entry to be filed under: (no account specified)			
Dec-01-2012	Rent	\$1,500.00	18

"No Account Specified"

Alternatively, if you click Payments → Collect a Payment and select a tenant/unit, you'll see this if you scroll down to the "Accounts" section:

Accounts	
Payment Account <input type="text" value="None"/> <input type="button" value="v"/>	Late Fee Account <input type="text" value="None"/>
Sub-Account <input type="text" value="None"/> <input type="button" value="v"/>	Sub-Account <input type="text" value="None"/>
Account & sub-account settings will be remembered for your next payment.	
Accounting Period <input type="text" value="None"/> <input type="button" value="v"/>	

This means that no accounting entries will be created for these payments.

How To Correct This

All you need to do is:

1. Add a standard set of account codes in Admin → Accounting tab.

2. Collect the first payment manually (using the Payments → Collect Payment method) and specify the account for the rental payment (i.e. "Rent Income") and the account for any late fee (i.e. "Late Fees"):

Accounts	
Payment	Late Fee
Account	Account
Rent Income	Late Fees
Sub-Account	Sub-Account

Save the payment - and an accounting entry should be saved as well (income entry).

3. The system will remember your account choices and they will be applied to all future payments, whether you collect them using the Payments → Collect Payment method, or the faster Payments Due → Pay button (green), which should now show the following:

Check	
Accounting entry to be filed under: Rent Income	
-01-2012	Rent \$1,500.00 18

If you're collecting non-rental payments, or any payments that you want applied to a different accounting code, use the Payments --> Collect Payment method, scroll down and manually specify the accounts you want the payments to go to. Accounting entries will be created appropriately.

8. Accounting

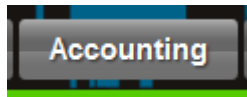
This chapter will demonstrate the accounting entries features of 123Landlord.

123Landlord will allow you to keep track of income and expense accounting entries. The system uses a simplified two ledger system of “money in” and “money out”. 123Landlord is not designed to replace a true double-entry accounting system like Quickbooks, but the accounting features are robust enough to be used to track profit & loss, cash flow, and organize your spending into accounts & categories.

You can create income or expense accounting entries manually on demand – you add them when you receive income or spend funds for business related expenses. When you [Collect Payments](#) in the system, income accounting entries are (usually) created automatically. When you create Work Orders, expense entries can automatically be created to track labor and material costs.

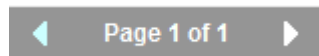
Accounting Entries Page

To view the income and expense accounting entries filed in the system, click the **Accounting** button on the [Main Toolbar](#):



The Income & Expenses page loads:

You can move between pages by clicking the Previous/Next page buttons:



By default, the Income & Expenses page is filtered to All Accounting Periods and to show both Income and Expenses:

You can make selections in these drop down lists to filter to a specific [Accounting Period](#), and/or to just show income or expense entries.

You can also filter accounting entries by a preset date range – either All entries, This Month, This Week, Last Month, Last Week, Last 90 Days, Current Year to Date, or Last Year. Just make a selection from the date range drop down:

Entries can be sorted by a variety of fields:

You can search for accounting entries for a particular tenant or property by typing them into the search box:





You can also search for accounting entries based on things like Ref # or a specific Amount.

To view the Comments for a specific accounting entry, click the Show More button



and the comments panel appears:

	May-31-2013 \$950.00		Rent Income
Payment Received - in person, on time			

Creating Accounting Entries

To create a new Expense entry, click **New Expense**. Similarly, to create a new Income entry, click **New Income**.



The **Accounting Entry** screen loads:

Accounting Entry

GeneralRecurrence

Type

Expense

Entry Date

Jun-05-2013

Reference #

Accounting Period

None

Building

None

Property

None

Tenant

None

Vendor

None

Amount

Tax 1

Tax 2

Account

None

Sub-Account

None

Description

Memo

Save

Editing Existing Accounting Entries

To modify an existing accounting entry, click the **Edit** button for the corresponding entry you want to edit:

333	Joe Namath	1010 Test Property *		Edit	✖
	Chris James	409 Alpine Street	Buildng ABC1	Edit	✖
	Chris James	409 Alpine Street	Buildng ABC1	Edit	✖

The **Accounting Entry** screen loads with the entry’s info loaded for modification:

Accounting Entry

GeneralRecurrence

Type	Entry Date	Reference #	Accounting Period
Income	May-31-2013		None

Building	Property
Buildng ABC1	409 Alpine Street

Tenant	Vendor
Chris James	None

Amount	Tax 1	Tax 2
950.00	0.00	0.00

Account	Sub-Account
Rent Income	None

Description

Payment Received - in person, on time

Memo

Save

Make the changes you require and click **Save** to save them.

Recurring Accounting Entries

You can create recurring accounting entries that repeat every day, week, month, or a custom number of days.

Create a new accounting entry and select the **Recurrence** tab:

Accounting Entry General Recurrence

☒ **Make this item recurring**

every month

Repeating: indefinitely

Custom # of days:

Number of times to repeat:

Starting on: Jun-05-2013

Repeat until: Jun-05-2013

Click the **Make This Item Recurring** box to enable recurrence. Select whether the item will repeat monthly, daily, every 7 days, or select a custom number of days and enter those in the **custom # of days** field.

In the **Repeating** field, specify how many times the item should repeat. You can have the item repeat indefinitely, a specific number of times, or until a specific date. Regardless of the setting you choose here, **the recurring items will only appear in your income or expense ledger list when they have accrued** - that is, if your settings generate a set of recurring entries on Sept 1, Oct 1, Nov 1, and Dec 1 - and today's date is Nov 10th (for example), you'll only see the entries for Sept 1, Oct 1, and Nov 1. The Dec 1 entry will not appear until Dec 1 or later.

You should specify a **start date** for the recurring entries to appear. This date is important - here's why:

The actual entry you're duplicating (or recurring) is set up on the **General tab**. All of the information set on this tab will be duplicated, including amount, account/sub-account code, and the tenant/property/building it is assigned to. **The first accounting entry generated will be set according to the entry date specified on the General tab.**

The **next** recurring entry generated will occur on the **Starting On** date of the Recurrence tab. This is the first child recurring entry. Subsequent child entries will be created based on the recurrence settings you specify.

So, as an example, you create an income accounting entry with an entry date (on the General tab) of Oct 12. You specify a monthly recurrence starting on Nov 1, recurring four times. You'll get the original accounting entry with an entry date of Oct 12, and (when today's date is Nov 1 or later), you'll see the first recurring entry for Nov 1. As time moves forward, you'll see the Dec 1 entry, the Jan 1 entry, and the Feb 1 entry. Because you've specified a limit of 4 times, the recurrence will then stop.

Approving Expenses

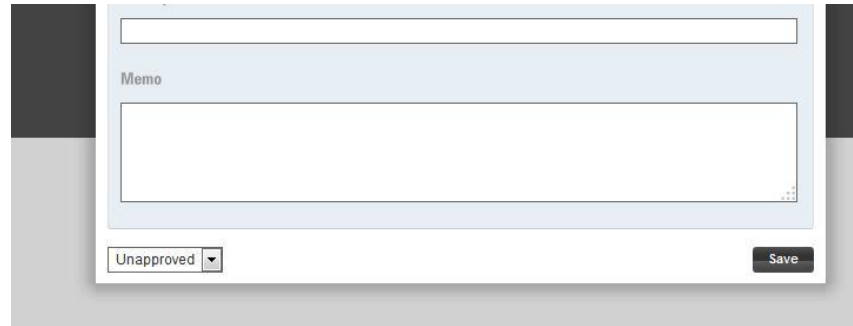
If you have enabled Expense Approvals, additional fields show up in the Income & Expense list form.

You will see a drop-down on the upper right corner of the tab allowing to you switch between Approved & Unapproved (the default), Approved Only, or Unapproved Only. Switching this will filter the list.



The screenshot shows the top portion of a web application interface. At the top, there are three dropdown menus: 'All Accounting Periods', 'Income & Expenses', and 'Approved & Unapproved'. Below these, there is a row of buttons: 'New Expense' and 'New Income' in blue, followed by two smaller icons representing a printer and a document with a magnifying glass.

Open an existing entry (expense) or create a new one. At the bottom of the entry detail screen, there is a drop down to switch between Unapproved and Approved for the entry. Toggle it accordingly and Save:

The screenshot shows a web form for an accounting entry. At the top is a single-line text input field. Below it is a section labeled 'Memo' containing a larger multi-line text area. At the bottom left of the form is a dropdown menu currently displaying 'Unapproved'. To the right of the dropdown is a dark button labeled 'Save'.

4. The accounting entries that are approved show a green 'check' icon.

Note:

- this is only for expenses, not income entries.
- with this setting on in Admin, only approved expenses will show up on the accounting entry and profit & loss reports (reports screen).
- you can get a list of unapproved expenses, just by switching the filter toggle to 'Unapproved Only' and the other filter to "Expenses Only".

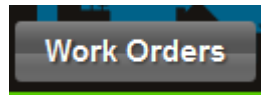
9. Work Orders

This section demonstrates how to use the Work Order features in 123Landlord.

Work Orders allow you to keep track of repairs, renovations, service calls, and other work being done on your properties, either at the request of tenants, or on your own accord.

Viewing Work Orders

The work orders screen is accessed from the **Work Orders** button on the [Main Toolbar](#):



Open, Pending, and Closed Work Orders are displayed:

Open Work Orders

Opened Date











Search by property or building name

Due: All

New Work Order

2 issues

Page 1 of 1

Due	Summary	Type	Priority	Opened	Property	Building	Vendor
 Mar-30-2013	Fix leaky faucet	 Repair	Normal	Feb-27-2013	47101 Coventry Blvd	West Block A	<div><div></div><div></div><div>Edit</div><div></div></div>
 Mar-09-2013	Repair broken fence	 Repair	Normal	Feb-27-2013	50 Gleniffer Lake Road	West Block A	<div><div></div><div></div><div>Edit</div><div></div></div>

Displaying all records sorted by Opened Date

Pending Work Orders

Opened Date Search by property or building name Due: All **New Work Order**

0 issues Page 1 of 1

Due	Summary	Type	Priority	Opened	Property	Building	Vendor
Displaying all records sorted by Opened Date							

Closed Work Orders

Opened Date Search by property or building name Closed: All **New Work Order**

0 issues Page 1 of 1

Closed	Summary	Type	Priority	Due	Opened	Property	Building	Vendor
Displaying all records sorted by Opened Date								

Similar to the [Property](#), [Tenant](#), and [Accounting](#) screens, Work Orders can be filtered by a preset date range, sorted by various fields, and you can search by tenant or property by typing into the search boxes.

Work Orders have one of three statuses – Open, Pending, or Closed. You can use these to mean anything appropriate to your organization, but for most purposes an open item is one that is new and work is currently being performed on the item. A pending work order would represent one where work has been completed and is under review, pending invoice or payment transaction, waiting for feedback from tenant, or some intermediate phase. A closed work order would likely mean an item where all work has been completed, vendor is paid, and tenant has been notified and is satisfied with the repairs.

Creating a New Work Order

To create a new work order, click the **New Work Order** button – either on the open work orders panel, the pending panel, or the closed panel. Depending on which one you click, the **Work Order** screen loads with the **Status** field set appropriately (open, pending, or closed):

New Work Order

Add New Work Order

GeneralRecurrence

Note: Summary is required.

BuildingOne World Trade Center

Propertyfirst floor

SummaryReplace Doors

Date OpenedNov-10-2015

Date DueJan-01-2016

Work Description

TypeRepair

StatusOpen

PriorityNormal

VendorPeter Jacobson (Peter's Window)

Quick SaveSave & Enter More Info

You can link the work order item to a specific **Property**, which auto-selects any corresponding Building and/or Tenant. The address for the property, if entered, is also displayed.

Enter a **Summary** to title the Work Order item, and a **Work Description** to describe the nature of the work order.

You can select a **Type** (Repair, Maintenance, Incident, Checkup, Meter Reading, Remove & Replace, Violation, or Other) and a **Priority** (Normal, Low, Medium, High, or Urgent).

If you have added Vendors on the Admin screen, you can link the Work Order to a specific [Vendor](#) by selecting it here. This will help organize your work orders by the individuals and firms performing the work involved.


Click the ‘**Save and Enter More info**’ button to enter more detail about the Work Order. Clicking this option will open the Work Order Detail form.

Work Order Details - first floor

Work Order # 2075541

Replace Doors

Property



first floor
1st floor
New York NY
Building One World Trade Center
Leased To [Howell Astor](#)

Details

- Type
- Status
- Priority
- Vendor
- Invoice #
- Key/Entry

Repair
Open
Normal
Peter Jacobson (Peter's Window Replacement)

Comments

Comments for this work order

Date	Comment	User
No comments linked to this work order		

Files & Documents

Files and documents specific to this work order

File Name	Comment
-----------	---------

Click the Details 'Edit' button to enter or edit the status, priority, vendor and entry instructions

The **Key/Entry Instructions** field is useful to indicate (either to your staff or to your vendors/servicepeople) how access to the property is to be gained. Normal input for this field would be along the lines of something like “Tenant will be home for the appointment”, or “Tenant has left key at main leasing office”.

Click the 'Edit' button on the Date pane to modify Work Order status dates.

Up to four dates can be associated with a Work Order – **Opened On** date, **Date Due**, **Work Started** date, and **Completed Date**. These let you indicate milestones during the lifecycle of the project or service call.

Adding Comments to a Work Order

Comments can be added to a specific work order by:

1. Select the Work Orders tab
2. Filter for the specific work order
3. Click the 'Detail' button to open the work order details
4. Click the 'Add New' in the comments pane. This will open the work order comment form



5. Enter the comment. If you would like this comment on the work order report, select the 'Include Comment on Report' check box.
6. Save and exit.

You can select the 'Mail' icon to email the comment. If you selected a tenant as the recipient of the email, an entry will also be copied to the tenant's contact history.

Adding Files & Documents to a Work Order

This section of the work order form allows you to upload files and documents specific to the work order. To upload a file:

1. Select the Work Orders tab
2. Filter for the specific work order
3. Click the 'Detail' button to open the work order details
4. Click the 'Upload Files' button in the Files & Documents pane. This opens the 'Upload Files' pane.
5. Select the file to upload.
6. Click the 'Upload' button, to upload the file.

Adding Expense Entries for Work Order Items

To add an expense to a work order:

1. Select the Work Orders tab
2. Filter for the specific work order
3. Click the 'Detail' button to open the work order details
4. Click the 'Expenses' tab in the top right corner.
5. Click the 'Add New' button in the expenses pane. This will open the Account Entry form.

Accounting Entry			
Type	Entry Date	Reference #	Accounting Period
Expense ▾	Nov-10-2015 ▾		2015 ▾
Vendor			
Peter Jacobson (Peter's Window Replacement) ▾			
Amount	Tax 1	Tax 2	
1500.00	15.00	0.00	
Account	Sub-Account		
Maintenance ▾	None ▾		
Description			
Replacing doors			
Memo			

- Enter the expense information and click 'Save'. The work order expense information can now be tracked on the 'Accounting' tab and can be reported on.

Important things to remember:

- If you delete the work order, the associated expense entry will **NOT** be deleted. This should be done manually. Also, if you un-check the box for either labor cost or materials cost on an existing work order and save it, **this will not remove any previously added accounting entry** - you should do your deletes manually on the accounting entry side.

- If you edit an existing work order that has a linked expense entry, and you change the amounts for labor cost or materials cost, **the associated amounts in the expense entry will also change**. If you change what account codes or what dates it is based on

- If you specify an account code for the accounting entry and for some reason you subsequently delete those account codes on the admin screen, **the account code will be reset to 'none' for those entries.** This was always the case for accounting entries when the master account code was deleted, so nothing has changed here.

Recurring Expenses for Work Orders

In some situations you may want to have a work order with recurring expenses. To do so, follow the procedure outlined above to open a specific work order and then follow these steps:

1. Click the 'Recurrence' tab in the top right corner.
2. Check the 'Make this item recurring', complete all information and click the 'Save' button. Select whether the item will repeat monthly, daily, every 7 days, or select a custom number of days and enter those in the 'custom # of days' field.

Work Order Details - first floor

☒ Make this item recurring

Repeating:
 every

Custom # of days:

Starting on:

Number of times to repeat:

Repeat until:

You can make this work order recurring, which means it will be duplicated every month or day (or whatever your setting) indefinitely, until a specific date, or for a certain number of times. Most details about the parent will be duplicated, including the building/property/tenant. Comments, expenses, and file attachments will not. Child recurring entries will default to 'Open' status.

The first entry (the parent) will be created based on the 'Date Opened' on the General tab above. The NEXT item (the child recurring entry) will be created on the 'Starting On' date on the Recurrence tab, and then subsequently, according to the recurrence settings you select. For example, your parent entry has an entry date of October 5 and you start a monthly recurrence on October 29. The first entry will be created for October 5, the next October 29, then November 29, December 29, and so on each month.

Save

3. In the "Repeating" field, specify how many times the item should repeat. You can have the item repeat indefinitely, a specific number of times, or until a specific date. Regardless of the setting you choose here, the recurring items will only appear in your work order list when they have been generated - for example, if your settings generate a set of work orders on Sept 1, Oct 1, Nov 1, and Dec 1 - and today's date is Nov 10th, you'll only see the entries for Sept 1, Oct 1, and Nov 1. The Dec 1 entry will not appear until Dec 1 or later.
4. You should specify a start date for the recurring work orders to appear. This date is important - here's why:



The actual work order you're duplicating (or recurring) is set up on the General tab. Most of the information set on this tab will be duplicated, including the description and work details, type, status, priority, status, and the tenant/property/building it is assigned to. The first work order generated will be set according to the Opened date specified on the General tab.

The next recurring work order generated will occur on the Starting On date of the Recurrence tab. This is the first child recurring entry. Subsequent child entries will be created based on the recurrence settings you specify.

So, as an example, you create a work order with an Opened date (on the General tab) of Oct 12. You specify a monthly recurrence starting on Nov 1, recurring four times. You'll get the original work order with an Opened date of Oct 12, and (when today's date is Nov 1 or later), you'll see the first recurring entry for Nov 1. As time moves forward, you'll see the Dec 1 entry, the Jan 1 entry, and the Feb 1 entry. Because you've specified a limit of 4 times, the recurrence will then stop.

Closing a Work Order

To simplify closing an existing work order, the "Close" button was added to the drop down panel that appears when you click the 'expand' arrows to show more info about an entry on the main Work Orders list page:

	2048151	Oct-04-2011	Fix leaky pipes and broken windows on garage.		Rep
<div> Work Description: Fix leaky pipes and broken windows on garage. Close </div>					
Served By: (not entered)		Vendor Tax ID: (not entered)		Invoice #: (not entered)	
Work Started: Oct-11-2011		Completed Date: (not set)			
Total Expenses: \$0.00		Total Tax: \$0.00			
Last Comment: (none)					

Clicking the close button will set the work order status to 'Closed' (it will move to the Closed work orders list) and the closed date will be set to today's date.

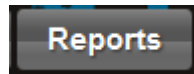
10. Reports

This section will demonstrate how to run 123Landlord reports, including the types of reports available and how to sort, filter, group, and export them to various file formats.

123Landlord comes complete with various reports that cover all aspects of your data and your business. Reports range from simple lists and detail sheets to full rent roll reports and profit & loss summaries.













Running Reports

Click the **Reports** button on the [Main Toolbar](#) to display the full list of reports available:



Reports

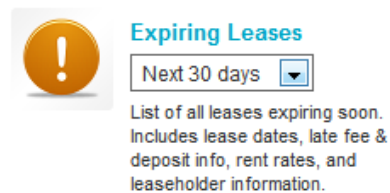
The following reports are available. Most reports can be configured on the report viewer screen, including customized sorting and filter options. Select a report below to open it in a new tab.

Tenants	Properties	Leases
 All Tenants List List of all tenants. Includes first/last name, address, telephone, and cellular.	 All Properties List List of all properties. Includes property name, building, address, city, state, and leased to.	 Active Leases List of all active leases. Includes lease dates, late fee & deposit info, rent rates, and leaseholder information.
 Leasing Tenants List All tenants with a lease. Includes first/last name, address, telephone, cellular, building, property.	 Leased Properties List All leased properties. Includes property name, building, address, city, state, leased to, and lease start/end date.	 Expiring Leases Next 7 days List of all leases expiring soon. Includes lease dates, late fee & deposit info, rent rates, and leaseholder information.
 Tenant Details Displays all current information about a tenant, including contact info, references & occupants, pets & vehicles, recent payments, current balance, and contact history.	 Vacant Properties List All vacant properties. Includes property name, building, address, city, state, and size.	 Expired Leases List of all expired leases. Includes lease dates, late fee & deposit info, rent rates, and leaseholder information.
 Contact History Full contact history list, for one or more tenants.	 Property Details Displays detailed info about a property, including comments, photos, and work orders.	 Closed Leases List of all closed leases. Includes lease dates, late fee & deposit info, rent rates, and former leaseholder information.
Payments All <input type="checkbox"/> Show Comments <input type="checkbox"/> Exclude Archived	Rent Roll As Of Date <input type="text"/> <input type="checkbox"/> Include Closed Leases Jun-05-2013	Accounting All Acct Periods <input type="text"/> <input type="checkbox"/> Show Comments All <input type="checkbox"/> Exclude Archived

Simple reports are accessed by just clicking the associated link:



Other reports require minor configuration before you click their link:



More advanced reports require additional configuration before you select them, including date ranges, whether to include closed leases, exclude or include archived data, whether to include or hide comments, etc:

All Acct Periods

Show Comments

All

Exclude Archived

When you configure and select a report to run, it is displayed in the Report Viewer.

The Report Viewer

When a report has been selected and generated, it is displayed in the Report Viewer:

All Buildings

All Properties

All Tenants

No Grouping

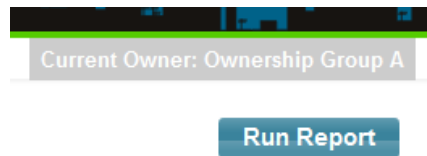
Lease Period

Complete Statements

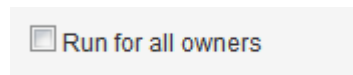
Run for all owners

ACME Properties LLC								
Tenant	Property	Building	Lease Period	Type	Due	Days Late	Collected	Balance
John Smith	112 Alpine Street	East Block B	Jan 01 2013	Application Fee	\$100.00	155	\$0.00	\$100.00
John Smith	112 Alpine Street	East Block B	Jan 01 2013	Late Fee	\$0.00		\$0.00	\$0.00
John Smith	112 Alpine Street	East Block B	Jan 01 2013	Rent	\$1,200.00	155	\$0.00	\$1,200.00
John Smith	112 Alpine Street	East Block B	Feb 01 2013	Rent	\$1,200.00	124	\$0.00	\$1,200.00
John Smith	112 Alpine Street	East Block B	Feb 01 2013	Late Fee	\$0.00		\$0.00	\$0.00
Chris James	409 Alpine Street	Building ABC1	Feb 04 2013	Rent	\$955.00	121	\$950.00	\$5.00
Chris James	409 Alpine Street	Building ABC1	Feb 04 2013	Security Deposit	\$1,521.00		\$1,521.00	\$0.00
Chris James	409 Alpine Street	Building ABC1	Feb 04 2013	Garage Fee	\$75.00		\$75.00	\$0.00
Chris James	409 Alpine Street	Building ABC1	Feb 04 2013	Late Fee	\$0.00		\$0.00	\$0.00
John Smith	112 Alpine Street	East Block B	Mar 01 2013	Rent	\$1,200.00	96	\$0.00	\$1,200.00
John Smith	112 Alpine Street	East Block B	Mar 01 2013	Late Fee	\$0.00		\$0.00	\$0.00
Chris James	409 Alpine Street	Building ABC1	Mar 09 2013	Garage Fee	\$75.00		\$75.00	\$0.00
Chris James	409 Alpine Street	Building ABC1	Mar 09 2013	Late Fee	\$0.00		\$0.00	\$0.00
Chris James	409 Alpine Street	Building ABC1	Mar 09 2013	Rent	\$950.00		\$950.00	\$0.00

Remember: reports are always generated for the current owner selected in the [Current Owner](#) button on the top-right of the screen:



Most reports can be run for **all owners**, just check the box to do so:



Filtering Reports

Most reports can be filtered for a specific Building, Property, or Tenant.

The first three drop down lists on the Report Viewer screen are the filter controls:



As you select a specific building, the Properties filter list changes to show properties from the selected building. Similarly, as you select a property, the tenants list filters to show tenants linked to the selected property.

Once your filter is set, click the **Run Report** button to refresh the report.

Grouping Reports

Reports can be grouped by various fields – the fields available to group by are specific to the report itself. In many cases the report will also show sub-totals rolled up by the grouping you specify.

For example, to group the Open Work Orders report by Property, select the report and then select “Property” from the Property filter list:

Click the **Group Records** button , or the **Run Report** button:

ACME Properties LLC								Work Orders - Open	
Opened	Due	Summary	Type	Priority	Labor	Materials	Tenant	Building	Vendor
<u>47101 Coventry Blvd</u>									
Feb 27 2013	Mar 30 2013	Fix leaky faucet	Repair	Normal	\$85.00	\$0.00		West Block A	
Jun 02 2013	Jun 30 2013	Repair torn roofing	Repair	Normal	\$0.00	\$0.00		West Block A	
Jun 02 2013	Jun 06 2013	Refinish driveway	Maintenance	Normal	\$0.00	\$0.00		West Block A	
Total :					\$85.00	\$0.00			
<u>50 Gleniffer Lake Road</u>									
Feb 27 2013	Mar 09 2013	Repair broken fence	Repair	Normal	\$500.00	\$115.00		West Block A	
May 26 2013	Jun 30 2013	Spring cleanup	Maintenance	Normal	\$0.00	\$0.00		West Block A	
Total :					\$500.00	\$115.00			
Grand Total :					\$585.00	\$115.00			

Sorted by Opened Date | Filtered by Building: All Buildings Property: All Properties Tenant: All Tenants
Grouped by Property

The report is grouped together by Property, and sub-totals on a per-property basis are calculated.

Sorting Reports

Report rows can be sorted by a number of different fields – these are usually specific to the report in the same way group fields are. To sort, simply select the field you wish to sort by:

and click the **Sort Records** button 

You can only sort and group reports by one field at a time.

Printing & Exporting

After you have generated your report and you are satisfied with the output, you might want to save the report results to a file, or print it.

To do, ensure the format setting is set to the file format you want (typically PDF or RTF / Word) and click the Print or Save button:



11. Dashboard

This chapter will demonstrate the features of the Dashboard and the kinds of information it summarizes.

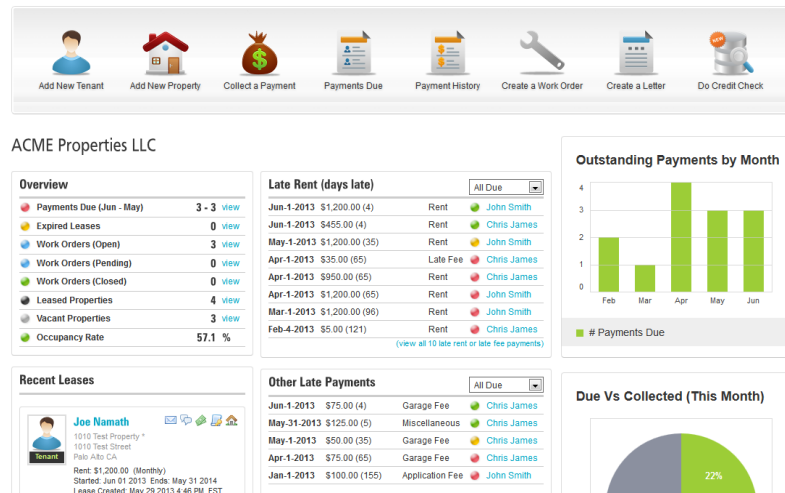
A hub of activity for your business, the dashboard provides an instant real-time status update, displaying information about who's late and what's due, expiring leases, pending work orders, and recent tenants. Information is summarized in tabular and chart format.

Viewing the Dashboard

Click the Dashboard button on the [Main Toolbar](#):

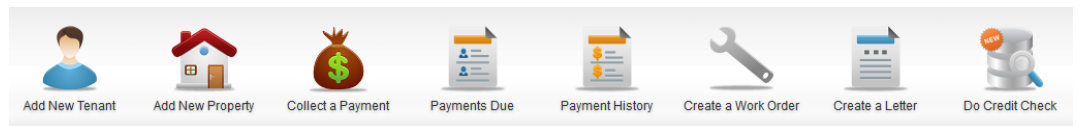


The **Dashboard** page loads:



Dashboard Menu Toolbar

The Dashboard Menu toolbar contains buttons to access commonly-used areas of 123Landlord, or to perform common tasks:











The menu buttons are fairly self-explanatory and are as follows:

Add New Tenant, Add New Property, Payments Due, Payment History, Create a Work Order, Create a Letter, and Do Credit Check.

Overview Panel










This panel shows counts of due payments, expired leases, work orders, leased & vacant properties, and your occupancy rate (leased ÷ (leased + vacant)).

Payments due counts are shown for the current month and the last month.

Overview		
	Payments Due (Jun - May)	3 - 3 view
	Expired Leases	0 view
	Work Orders (Open)	3 view
	Work Orders (Pending)	0 view
	Work Orders (Closed)	0 view
	Leased Properties	4 view
	Vacant Properties	3 view
	Occupancy Rate	57.1 %






Late Rent Panel

The Late Rent panel shows a subset of the full list of late rent payments and late fees – the amount due is shown, days late, and a lateness indicator (green for less than 30 days late, yellow for 30 days late or more, red for 60 days late or more).

Late Rent (days late)				All Due 
Jun-1-2013	\$1,200.00 (4)	Rent		John Smith
Jun-1-2013	\$455.00 (4)	Rent		Chris James
May-1-2013	\$1,200.00 (35)	Rent		John Smith
Apr-1-2013	\$35.00 (65)	Late Fee		Chris James
Apr-1-2013	\$950.00 (65)	Rent		Chris James
Apr-1-2013	\$1,200.00 (65)	Rent		John Smith
Mar-1-2013	\$1,200.00 (96)	Rent		John Smith
Feb-4-2013	\$5.00 (121)	Rent		Chris James
(view all 10 late rent or late fee payments)				

Other Late Payments Panel

This panel is the same as the Late Rent panel, except it shows non-rent payments that are due.

Other Late Payments				All Due
Jun-1-2013	\$75.00 (4)	Garage Fee		Chris James
May-31-2013	\$125.00 (5)	Miscellaneous		Chris James
May-1-2013	\$50.00 (35)	Garage Fee		Chris James
Apr-1-2013	\$75.00 (65)	Garage Fee		Chris James
Jan-1-2013	\$100.00 (155)	Application Fee		John Smith

Expiring Leases Panel

This panel shows leases that expiring within the selected date range. You can choose to show properties that are expiring within the next 7, 14, 30, or a custom number of days:

Leases Expiring	Next 7 days
There are no leases expiring in the selected range.	

To set a custom number of days for lease expiries to show up on this panel, click the **Settings** button (top-right hand corner of any screen) and enter the custom number of days:

Dashboard Lease Expiry

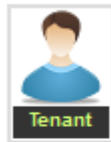
120

days

Recent Leases Panel

This panels shows the most recent leases (tenants & properties) created in the system.

Recent Leases

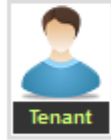


Joe Namath



1010 Test Property *
1010 Test Street
Palo Alto CA

Rent: \$1,200.00 (Monthly)
Started: Jun 01 2013 Ends: May 31 2014
Lease Created: May 29 2013 4:46 PM EST



Mark Jones



1010 Test Property
1010 Test Street
Palo Alto New South Wales

Rent: \$1,000.00 (Monthly)
Started: Jun 03 2013 Ends: Jun 03 2033
Lease Created: May 17 2013 1:20 PM EST



Chris James




400 Alhina Street


Recent Work Orders Panel

This panel displays the most recent [Work Orders](#).

Recent Work Orders



Repair broken fence
Fence was hit by car on Jan 12 - needs a re-build to two panels.
50 Gleniffer Lake Road
50 Glenniffer Lake Rd Apt A23
(West Block A)



Fix leaky faucet
Faucet is leaking (upstairs bedroom #2)
47101 Coventry Blvd
47101 Coventry Blvd NE
(West Block A)

Contact History Reminders

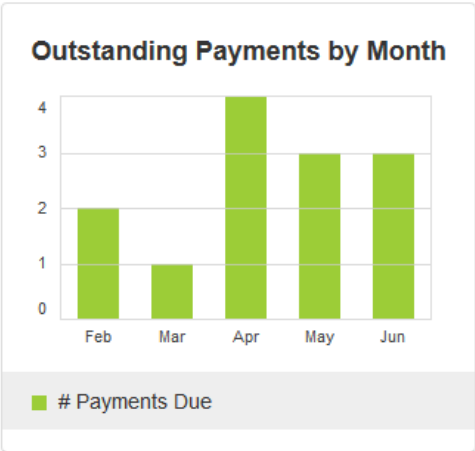
This panel shows contact history reminders – these items are added on the Tenant Details → [Contact History](#) tab when you create new contact history items. There is an option on that screen to include a ‘reminder’ with your contact history record – the reminders are displayed here on the Dashboard:

Contact History Reminders

May-28-2013 Telephone	Chris James
<i>Spoke to tenant on the ph...</i>	

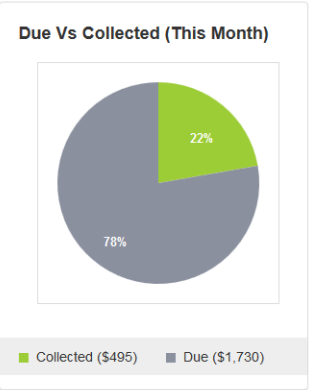
Outstanding Payments by Month Chart

This chart indicates the number of payments that have not been paid in full, by month, for the last five months.



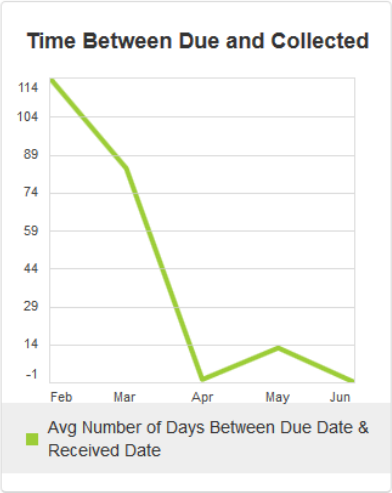
Due Vs Collected (This Month) Chart

This shows the percentage of due payments vs. payments that have been collected in full.



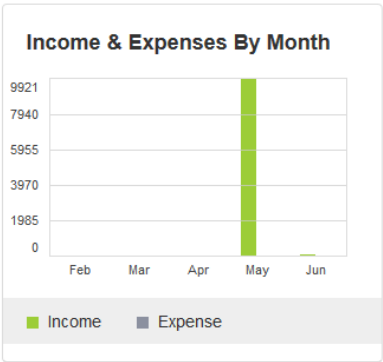
Time Between Due and Collected Chart

This chart indicates the average number of days that are between your payment due dates (when payments are due) and the actual received dates of payments for those periods. This is a good indicator of how late your tenants pay, so a low number of days on this chart is good.



Income & Expenses by Month

This chart is a basic summary of your income accounting entries total against your expense entries total, by month, for the last five months.



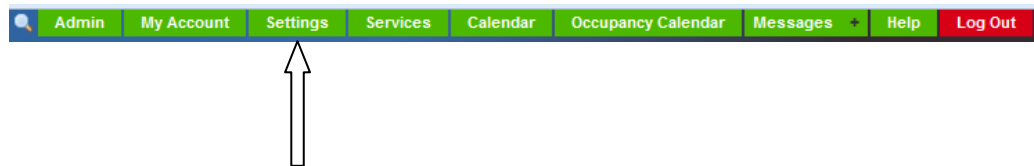
12. User Settings

This chapter highlights the different Settings options available to a User and how they are used in 123Landlord.

The Settings screen allows you to customize how 123Landlord works for you, and lets you tweak default selections, calculation rules, and regional settings.

Viewing the Settings Screen

Click the **Settings** button which is found at the very top-right corner of most screens:



The **Settings** screen loads:

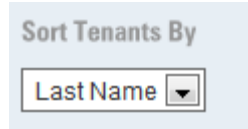
Settings

Sort Tenants By Last Name	Sort Properties By Property Name	Default Date Range All	Dashboard Lease Expiry 120 days
Tenants Usually Pay By Check	Typical Application Fee 25	Typical Deposit Amount 500	Typical Rent Amount 1000
Default City Palo Alto	Default State California	Show Money in this Currency USA/Canada Dollar \$	Show Property Sizes In Square Meters
On Reports Show Company Name Only	Show Custom Logo Hide Custom Logo		Switch to Next Due Date Right away
Tax 1 Name Tax 1	Tax 1 Rate 0 %	When Sending Email, Use This as the 'From' Address: User Account: support@123landlord.com	
Tax 2 Name Tax 2	Tax 2 Rate 0 %	Email Me: <input type="checkbox"/> When Rent Is Late <input type="checkbox"/> When Leases Have Expired <input type="checkbox"/> When Work Orders Are Due <input type="checkbox"/> When Tenants Send Work Order Requests	
Page Size Limit (List Screens) 25 records / page	Note: 'Show All Records' may increase page load times for large numbers of records. Notification emails are sent on the 5th, 15th, and 25th of each month		

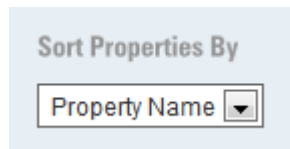
Currently browsing in unsecured mode. [Switch to secure SSL \(https\) mode.](#)
Save

Default Field Settings

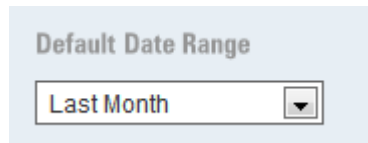
123Landlord will let you specify which fields you usually sort properties and tenants by, as well as default date ranges and some other fields. Wherever possible, these are used on other areas of the screen as default selections. For example, if you choose to **Sort Tenants By** the Last Name field on the Settings screen, the Tenants list screen will load, sorted by Last Name by default. You can of course change it on the Tenants list screen, but it will always revert to the default specified on the Setting screen on the first load of the page.

Sort Tenants ByA light blue rectangular box with the text "Sort Tenants By" at the top. Below it is a dropdown menu with a white background and a black border. The text "Last Name" is visible in the dropdown, followed by a small downward-pointing arrow icon.

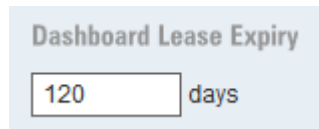
Indicates which fields to typically sort tenants by

Sort Properties ByA light blue rectangular box with the text "Sort Properties By" at the top. Below it is a dropdown menu with a white background and a black border. The text "Property Name" is visible in the dropdown, followed by a small downward-pointing arrow icon.

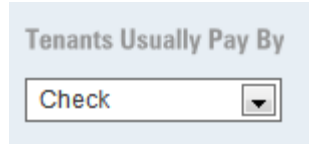
Indicates which field to typically sort properties by

Default Date RangeA light blue rectangular box with the text "Default Date Range" at the top. Below it is a dropdown menu with a white background and a black border. The text "Last Month" is visible in the dropdown, followed by a small downward-pointing arrow icon.

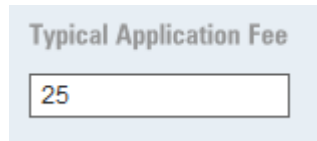
Indicates the typical date range to use when displaying data on screens like the Payment History and Payments Due pages

Dashboard Lease ExpiryA light blue rectangular box with the text "Dashboard Lease Expiry" at the top. Below it is a text input field with a white background and a black border. The number "120" is entered in the field. To the right of the input field is the text "days".

Specifies how many days to look ahead for upcoming lease expiries, for the “custom” option on the Dashboard [Expiring Leases](#) panel

Tenants Usually Pay ByA screenshot of a web form element. It has a light blue header bar with the text "Tenants Usually Pay By" in a grey font. Below the header is a white rectangular box containing the word "Check" in a blue font, followed by a small downward-pointing arrow icon, indicating a dropdown menu.

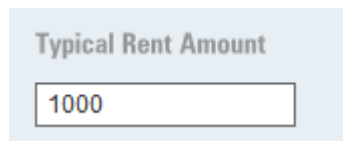
Specifies the default payment method; used on the Payment History Quick Pay panel and the Collect Payment page.

Typical Application FeeA screenshot of a web form element. It has a light blue header bar with the text "Typical Application Fee" in a grey font. Below the header is a white rectangular text input field containing the number "25" in a black font.

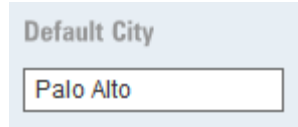
Specifies the usual application fee; inherited by all new property records you create

Typical Deposit AmountA screenshot of a web form element. It has a light blue header bar with the text "Typical Deposit Amount" in a grey font. Below the header is a white rectangular text input field containing the number "500" in a black font.

Specifies the usual deposit amount; inherited by all new property records you create

Typical Rent AmountA screenshot of a web form element. It has a light blue header bar with the text "Typical Rent Amount" in a grey font. Below the header is a white rectangular text input field containing the number "1000" in a black font.

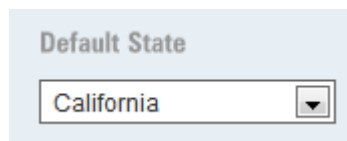
Specifies the usual default rent amount; inherited by all new property records you create

Default City

Default City

Palo Alto

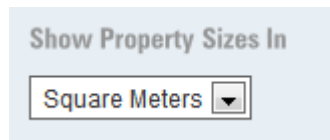
Specifies the default city to use when creating new tenants and properties

Default State

Default State

California ▼

Specifies the default state/province to use when creating new tenants and properties

Show Property Sizes In

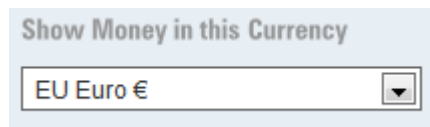
Show Property Sizes In

Square Meters ▼

You can choose to display sizes on property screens in Square Feet, or Square Meters

Currency Setting

You can specify the currency that you work most often in – 123Landlord is preloaded with a number of different world currencies – contact us to add one that isn't already in the drop down list.



Show Money in this Currency

EU Euro € ▼

When you select a currency, 123Landlord does **not do any cross-currency conversion**. That is to say, the system will not convert existing values entered from one currency to another based on some current market rate. The system uses the currency setting for **display** only. It will show monetary values with the correct symbol associated with the currency you select, and the typical numeric format association with that regional culture.

If one user in your company has his or her currency setting set to **USA/Canada Dollar \$** and enters a record with a monetary amount of 950.00 associated with it, it will appear as **\$950.00** (nine hundred & fifty dollars). If another user on your account logs in with his or her currency setting set to **Denmark Kroner kr**, however, they will see this amount as **kr 950,00** – regardless of the currency rate differences between this two amounts, the intrinsic value stays the same – only the **display** format is modified.

Accounting Entries Tax Settings

When you enter accounting entries, there are fields to include two optional tax amounts. These could represent sales tax, a regional tax, VAT, or some other goods & service tax.

If these are applicable to you, you can specify the names and rates for these taxes on the Settings screen:

Tax 1 Name	Tax 1 Rate
<input type="text" value="Tax 1"/>	<input type="text" value="0"/> %
Tax 2 Name	Tax 2 Rate
<input type="text" value="Tax 2"/>	<input type="text" value="0"/> %

Report & Company Logo Settings

These settings impact what information is shown on reports and screen headers:

On Reports Show	Show Custom Logo
<input type="text" value="Company Name Only"/>	<input type="text" value="Hide Custom Logo"/>

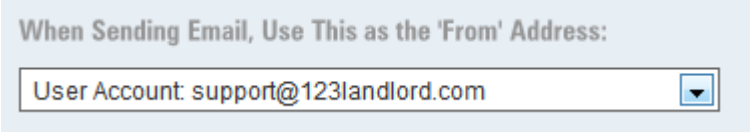
On reports, you can show one of the following:

- Your Company name (from the My Account → [Billing Tab](#)) in the report header
- Your Company name in the header, with the [current Owner](#) name in the footer.
- Owner name in the header
- Owner name in the header, with the Company name in the footer.

For your [custom logo](#), you can:

- Show it in the 123Landlord header on all screens of the system AND on reports
- Only show it on reports
- Only show in in the 123Landlord header
- Hide the company logo (not displayed in system header or on reports)

Email Sending Settings



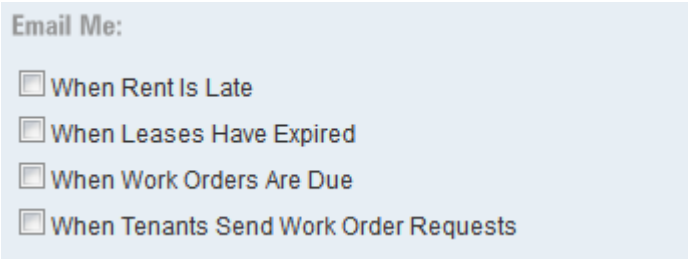
When Sending Email, Use This as the 'From' Address:

User Account: support@123landlord.com

When you send email from within 123Landlord, you can use (as the “from” address) the email address linked to your [billing account](#), or the email address linked to your [user profile](#). If you want your emails to come from a consistent source, you might want to standardize this and have all users use the billing account email address.

Email Notification Settings

123Landlord sends out notifications regularly when a few different events or milestones occur:



Email Me:

- ☐ When Rent Is Late
- ☐ When Leases Have Expired
- ☐ When Work Orders Are Due
- ☐ When Tenants Send Work Order Requests

You can choose to have email sent to you when Rent Is Late, when Leases Have Expired, when Work Orders Are Due, and/or when Tenants Send Work Order Requests.

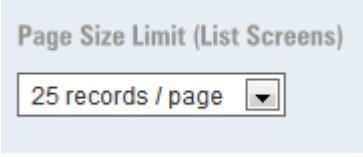
Email notifications are only sent for active accounts (billing accounts in good standing) and are sent on the 5th, 15th, and 25th of each month.

Un-checking these boxes will mean that no email will be sent to notify you of these events.

Record/Page Size Settings

You can limit the number of records per page to 10, 25, 50, 75 or 100 – set this according to your personal preference and typical number of records. The property, tenant, payment, accounting, and work order screens will respect this setting and page accordingly.

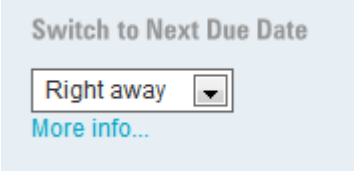
You can also choose the “Show All Records” option to turn off paging. This is likely the best option if your typical number of records is around 100. This option may increase page load times for lists and screens with large number of records.



Page Size Limit (List Screens)

25 records / page ▼

Switch to Next Due Date Setting



Switch to Next Due Date

Right away ▼

[More info...](#)

When collecting payments, the system will auto-select (on the collect payment screens) the nearest due date from 'today' just to make it a bit easier and not have to always select the right due date for your payments.

For example, if today was March 10, and you had due dates in your lease like Feb 1, Mar 1, and April 1, the system would preselect April 1, because it knows this is normally the next period due in the lease (since Mar 1 has passed).

However, if you normally take a bit longer to get all your rental payments in, and you need more time, you might want to have the system wait a few days before it switches to the next due date. Some users have indicated that they often wait a few days because they want to make sure checks clear, ACH payments go through, etc. But by the time you go into the system on March 10, the system is already selecting April 1, so you

have to change this back to March 1 to collect the payment. This is an extra step that takes a bit longer to perform, especially if you have lots of payments to enter.


With this setting you can adjust this behavior, by specifying the number of days to wait before the system will select the next due date. For example, if you specify 15 days, the system will not start selecting April 1 until March 15. Until March 15th, the pre-selected due date will still be March 1.

Keep in mind that this only affects the pre-selected due date - you are of course free to change the due date to anything to allow you to collect the payment for the period you want. This does not force you to collect your payments at any specific time, or change anything in the system other than saving you a little time in changing the pre-selected value for the period due date.

SSL (Secure Browsing Mode) Setting

You can use 123Landlord in a secured (SSL & https) browsing mode, which provides a secure, encrypted method of communications between our server and your browser.

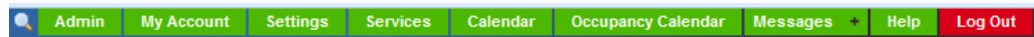
SSL (secure sockets layer) is an industry standard and is used by millions of websites to protect data transmission from unauthorized access.

 Currently browsing in unsecured mode. [Switch to secure SSL \(https\) mode.](#)

While we recommend SSL mode be turned on, you can elect to use either mode.

13. Services

The Services screen allows the user to setup a tenant portal, provide the ability to sign-up for tenant credit reports & background checks and generate an applicant website import module.



Tenant Portal

The tenant portal tab is used to set up your tenants so they can log into the system to see their current balance, create maintenance requests and to make payments to the property owner or landlord. The first step is to activate the tenant portal.

How to activate the Tenant Portal

In order to activate a tenant portal, the tenant record must already exist and must be leasing a property. If the tenant is properly set up they will be displayed in the 'Tenant Portal Accounts' pane.

1. From the Tenant Portal tab click the 'Activate' button for a tenant. The button will change from 'Activate' to 'Deactivate' and will provide a PIN# which the tenant will use as the password to log into the portal.
2. Click the 'Send Portal Info' button to send a link to the Tenants email address. The tenant will be emailed a link to <https://app.123landlord.com/TenantPortal/> - when this link clicked it will open a browser window or tab to the tenant login screen:

Tenant Login

Login to your tenant portal (email & PIN # required)

Email Address:

PIN #:

*

*

Login

3. After the account has been activated, you can now select the settings for the tenant portal accounts.

Settings

Save

Show Money on the Portal In:

USA/Canada Dollar \$
▼

☒ Show My Logo on the Portal

Allow Tenants To:

☐ Send ACH Payments i

☐ Send CC Payments i

☐ Print Receipts

☐ View Documents i

☒ Send Maintenance Requests

☒ Send Messages

☒ See Balance & Payment History

From the options above, you can enable the following:

- Send ACH Payments – this allows the tenant to send the property owner e-check (bank-to-bank) payments through the automated clearing house system. To use this feature you must complete an application to confirm your business activities and identity, and be approved as an ACH merchant.
- Send CC Payments – this option allows the tenant to pay their rent via credit card using a Stripe account. The property owner or landlord must set up an account with Stripe (easy & fast approval) for this option.
- Print Receipts – allows tenant to print receipts

- View Documents – allows tenant to view documents that you have uploaded to their file.
- Send Maintenance requests – The tenant can send a maintenance request through the portal.
- Send Messages – The tenant can send a messages to the property owner through the portal.
- See balance and payment history – The tenant can view their payment history and balance owed.

How to add ACH Account Credentials

The ACH functionality of the tenant portal allows you to have multiple bank accounts and specify which account each tenant's funds transfer gets transferred to.

First, you need to have ACH payments enabled for your account (you'll need to be approved by the underwriting & compliance team first, but approvals are straight-forward and only take 2-3 days). If you need multiple accounts, make sure request additional "Locations" when you're applying for the ACH add-on.

For each Location, you'll have a different Location ID and this is associated with a particular bank account into which your tenants will send funds.

Now, when you go to the Services page in 123Landlord, you'll see that there is an ACH Credentials section.

PLEASE NOTE: If you don't currently have ACH services enabled, nothing you add to this area will matter - you need ACH enabled to proceed here. Also, if you already have ACH services enabled, but you only have one account and you want to keep it that way, this area does not apply to you - your credentials are already stored in the system. If you want to add another bank account, contact us.

The ACH credentials area allows you to set up your different Location IDs. All of the information required here is generated and sent to you when your ACH services are approved.

Click Add ACH Credential to add your first location ID:

Description	Merchant ID	Location ID
Bank Account ABC	123456	001

Store ID	Store Key	Is Default
XYZ123	ABCDEF1111	Yes ▼

Save

Give the credential a descriptive name that represents the bank account for this credential. Enter the Merchant ID, Location ID, Store ID, and Store Key issued to you.

Continue adding ACH credentials for each location ID you have been approved for.

Linking Tenants to Bank Accounts

Now that you've added your bank accounts / credentials, you can specify which tenant payments go to which bank accounts. This is done at the **Building** level - so you'll need to have your tenants assigned to Properties in the system (normally by creating lease records that link the tenants to the properties), and the properties should be linked to a Building. The Building is a way of categorizing a number of Properties/Units into a higher level group, that either represents a physical building the units or apartments belong to, or just as a virtual way of categorizing/grouping units/properties.

Once your properties are pointing to Buildings, you can link the Building to your ACH Credential (Bank Account). Click Edit on the Buildings screen to open a Building entry and link an account (you'll need to be an Admin user to see this selector field):

Building Information

Building Name West Bldg	Address 1 1234 East Ave	Address 2
City Palo Alto	State California ▼	Post Code 62342
Telephone 	Purchase Date May-16-2011 ▼	
Manager Name 	Manager Telephone 	

ACH payments from tenants in this building should go to Bank Account 001 ▼ **Save**

Select an ACH Credential and click Save.

Now, when Tenants log into the Tenant portal, the system will detect what property (and thus Building) they belong to, and will transfer any funds they send to you to the bank account associated with the ACH Credential linked to that Building. This way you can cleanly segregate tenants funds into the bank accounts they belong to.

Credit Reports & Criminal Background Checks

This section provides the ability to create an account to do credit reports and background checks.

Applicant Website Import

We offer custom Application Forms as an add-on service. We can create the application form (web-based) for you with the fields you require etc., and when it is submitted it will automatically create a 123Landlord applicant for you in the system, and send you an email notification.

You can host this on your own website (or on ours) and we can of course assist with the integration.

Typically the cost for this depends on complexity of course; it ranges between \$399-\$599 usually. Contact us and let us know what fields you need (or send a sample of a Word or PDF one you'd like to emulate).

The **Applicant Website import** widget on the Services page is a 'lite' version of this that will let you generate the HTML to create a small form that prospective tenants can fill out - this will also create an applicant etc in the system, but it is not as comprehensive as the custom built form, and it is a widget that needs to be hosted on your own website. This option requires some technical knowledge of website design.

14. Calendar

The calendar form allows the user to view calendar items such as: Lease Expiries, Work Order due dates, Contact follow-up reminders, Tenant birthdays, as well a custom calendar events you add yourself.

The screenshot displays the 'Calendar' interface. At the top, there are four checkboxes: 'Show lease expiries', 'Show work order due dates', 'Show contact follow-up reminders', and 'Show tenant birthdays'. To the right of these is a dropdown menu labeled 'Current Owner: Hillary Clinton' and a 'New Calendar Item' button. Below this is a navigation bar with 'today', 'November 2015', and tabs for 'month', 'week', and 'day'. The main area is a calendar grid for November 2015, with days of the week (Sun, Mon, Tue, Wed, Thu, Fri, Sat) and dates (1-14). Day 10 is highlighted in yellow.

Like most data in 123Landlord, all calendar events are specific to the current owner - set on the "current owner" button. You can switch between owners, add calendar events, switch back, etc. The calendar can also show events from specific owners by selecting the 'Current Owner' drop down list and selecting the appropriate owner.

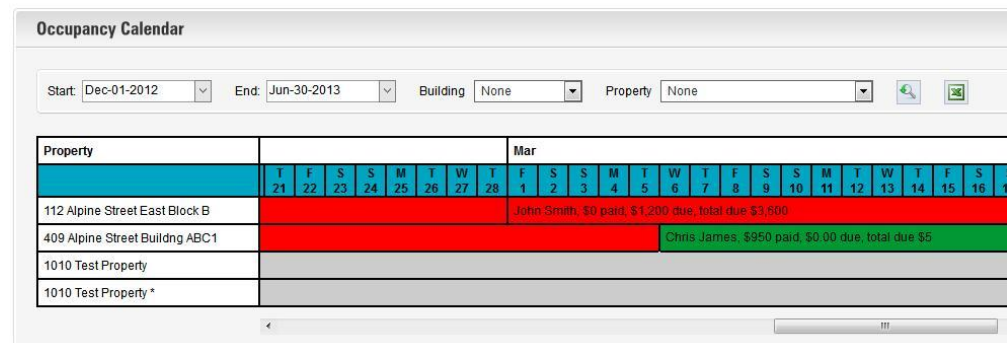
Note that the calendar is currently visible to all users in your account, however users that have been limited to viewing data for a particular owner only will only see calendar events for that specific owner (they will not be able to switch owners).

15. Occupancy Calendar

The Occupancy Calendar is available from the top-level menu, on most screens:



The Occupancy Calendar is designed to give you an overall picture of the vacancy/occupied status of your properties, and which tenants currently owe rent (Red), or are paid in full (Green):



The screen features a locked pane and a side-scrolling view, and you can specify any date range you'd like. You can view the calendar for specific building & property combinations, or all units. The Occupancy Calendar (like most things in 123Landlord) is specific to the current owner, so you can switch between owners to see the properties for any owner - just use the "Current Owner" button as usual.

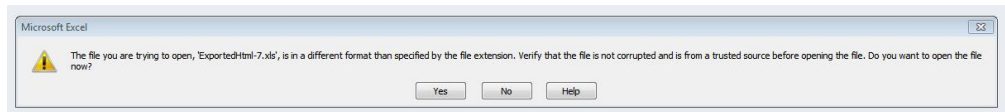
Once you've selected the date range and the building / property you want to filter for, click the Refresh button (magnifying glass icon). Once you've retrieved results on the calendar, you can use the Excel button to export the view to a spreadsheet:



Note that for certain newer versions of Excel, you might receive an error similar to the following:

"The file you are trying to open, 'ExportedHtml.xls', is in a different format than specified by the file extension. Verify that the file is not corrupted and is from a trusted source before opening the file. Do you want to open the file now?"

You can indeed ignore this message, click Yes, and the Excel file will open.



16. Messages

The Messages screen allows a user to send out a message to any other user on the same account (or all users).

Message

Select Recipients
Choose which users in your account should receive this message. A copy of the message will be sent to each user you specify here. Admin users can add new users on the [Admin page](#).

Your Account Users: George Costanza [v] →

Recipients: George Costanza [x]

Message Details

Subject: Please check up on Property 212 A

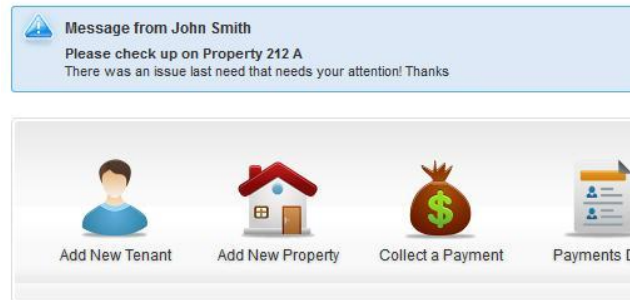
Message: There was an issue last need that needs your attention! Thanks

Send

Specify the recipients by selecting a user from the list (or all users) and clicking the --> arrow. Enter an optional subject and some (required) message text. Click the Send

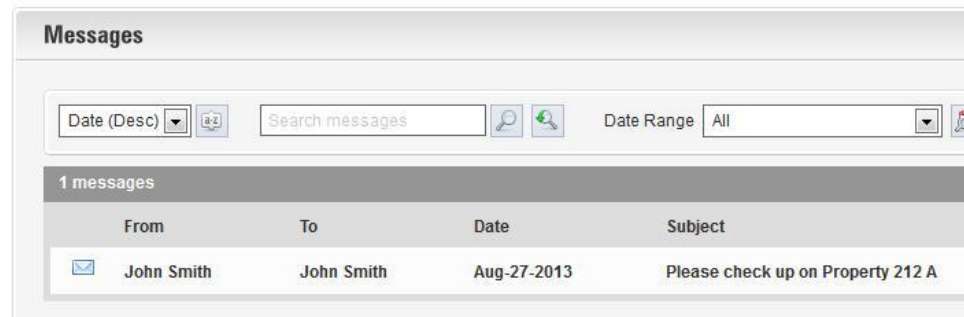
button to create the message. A message will be created and sent to each user you have specified.

When you create a new message, it will also appear as a notification on the dashboard for all users you have selected as recipients:



ACME Property Management Inc.

This notification will be displayed on their dashboard until they dismiss it. All messages are available on the Messages screen:



You can create new messages from here as well, and delete and view existing messages.

17. Searching for Properties & Tenants



This chapter highlights a number of ways to easily find specific tenants and properties in 123Landlord

Once you start adding a lot of tenants and properties into the system, it quickly becomes important to know how to find them. Often, if your records are named consistently and sorted well, you can simply scan a long list of tenants or properties and find what you're looking for relatively quickly.

More often than not, though, you'd save time by being able to search for specific tenants or properties. In 123Landlord there are a few options, ranging from the most simple to a bit more advanced.

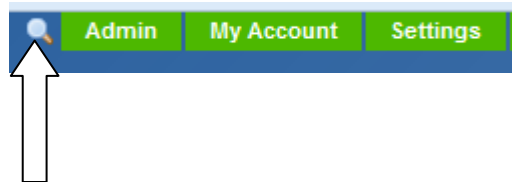
Simple Tenant & Property Filters

You can use the filter text fields on the building, property, tenant, payments due, payment history, accounting, and work order list pages to type tenants, properties, or other search criteria. 123Landlord will search the list for records that match that search, or display suggestions for tenants or properties as you type them.



Global Tenant & Property Search

To search for all tenants or properties **across all owners**, you can use the global search utility, located at the very top of most pages:



Click the global search icon  to display the search textbox:




Enter a tenant or property name – suggestions will appear as you type:




Suggestions will appear across all owners. Often you might want to quickly search for a property by address (or property name) or for a tenant, and you don't necessarily want to have to switch to the owner that it belongs to, just to quickly view basic info about it. Often, you might not even know off hand what owner it belongs to. One of our users described a scenario where he would be going through received payments, and would not know which ownership groups certain properties belonged to, but he knew the addresses of the properties and wanted to quickly find a particular property.

Click a suggestion to display the property or tenant search result:



John Smith
112 Alpine Street #290
Palo Alto CA


[Tenant Details](#) | [Send Email](#) | [Contact History](#)
[Payment History](#) | [Payments Due](#)
Tel 403 555 1212 Cell 403 555 1211
Last Contact On: (none entered)
[References \(0\)](#) | [Residences \(0\)](#) | [Employers \(0\)](#)
[Occupants \(0\)](#) | [Pets \(0\)](#) | [Vehicles \(0\)](#)
Owner: Ownership Group A



112 Alpine Street
112 Alpine Street #290
Palo Alto CA


[Edit Lease](#) | [Property Details](#) | [Collect Payment](#)
Rent \$1,200.00 (Monthly) Balance \$7,300.00
Start Jan 01 2013 End Jan 01 2014 1st Pmt Jan 01
Late Fee None Deposit Flat Fee: \$1,200.00
Last Pmt Next Pmt Jul 01 2013
Secondary Tenants: None

If you pull up a tenant or property that belongs to a different owner than the one you're current set to, you'll be able to see the basic info, but it will be "grayed out" and you won't be able to go further, until you switch owners. Also note that the owner that the property or tenant belongs to is now shown on this screen for your reference:



My New Property
123 Anywhere Street #B129
New York NY

[Property Details](#)
Size 1215 Year Built Not Entered
Type Not Entered Style Not Entered
Building None Assigned
[Work Order Issues \(0\)](#) | [Photos \(0\)](#)
Owner: ACME Properties



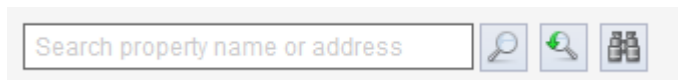
This pro
This prop
but you ca
You can als
page

This way, no matter what Owner you're currently working with, you can quickly pull up any property or tenant and see what's due, basic lease info, etc. and you can quickly find out what owner you need to switch to to be able to work further with that record.

The only **exception** to this is if you're a user that has been restricted to a particular owner - in your case you'll still only be able to see properties and tenants for your owner; this hasn't changed.

Advanced Property Finder

To search for properties based on multiple search criteria, use the finder tool on the [Properties page](#):



Click the Find Records by Multiple Search Criteria button:



The **Property Finder** screen is displayed:

Property Finder

Find properties that are leased and have the following attributes:

Type	Heating	Beds
Any	Any	<input type="text"/>
Style	Air	Bath
Any	Any	<input type="text"/>
Parking	Flooring	Year Built
Any	Any	<input type="text"/>

Combine attributes with: OR

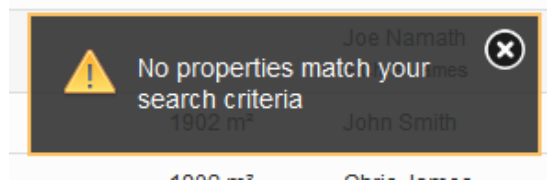
For example, choosing 'And' will search for properties where heating is 'Electric' AND number of bedrooms is 3, but choosing 'Or' will select properties where the heating is 'Electric' OR the number of bedrooms is 3.

Find Properties

You can search for properties that are leased or vacant, based on a variety of parameters across a number of fields.

You can combine your search parameters using **And** logic or **Or** logic. For example, choosing 'And' will search for properties where heating is Electric AND number of bedrooms is 3, but choosing 'Or' will select properties where the heating is Electric OR the number of bedrooms is 3. Naturally, the And logic searches are likely more restrictive than the Or searches.

Click the **Find Properties** button to filter the properties list accordingly. If no properties are found that match your search, a message will indicate this:



18. Documents & Files

This chapter demonstrates the HTML and PDF documents and files features of 123Landlord.

In addition to being able to store [common files](#), [property-specific files](#), and [tenant-specific files](#), 123Landlord will allow you to create highly personalizable HTML letters, leases, or any form you can imagine. These documents can be ‘tagged’ with 123Landlord data fields that (when printed) will display customized tenant and property data, much like a Word mail merge.

You can also upload PDF files that you work with and have 123Landlord auto-populate the fields already embedded in those files with your tenant and property data from the system.

Letters & Form Templates

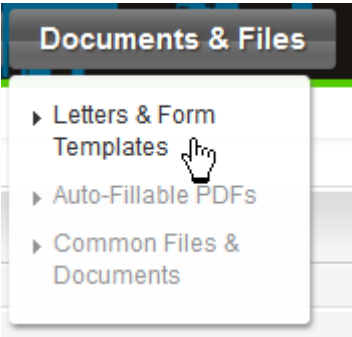
123Landlord will allow you to create HTML based forms, leases, letters, or any kind of document – you can link text “tags” to database fields from the system and auto-populate your property and tenant data into the form when it is printed.

You can create your own letters and forms or you can start with an existing template – 123Landlord comes pre-loaded with a number of common letters and forms.

Letters and Forms are accessed from the **Documents & Files** button on the Main Toolbar:






A screenshot of a software toolbar. It features a single button with a dark background and light-colored text that reads "Documents & Files". The button has a slight 3D effect with a shadow on its right side.

Hover over this button and select **Letters & Form Templates**:



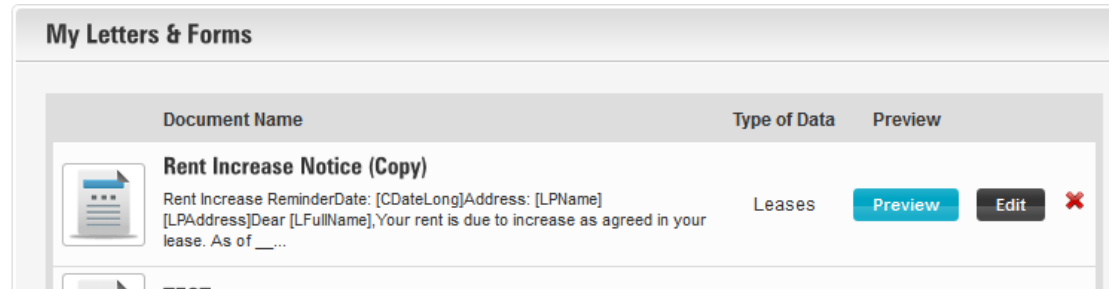
Using An Available Template

To use an existing template, scroll down to the **Available Templates** area:

Available Templates			
Template Name	Type of Data	Preview	Add to My Documents
 Rent Increase Notice Rent Increase ReminderDate: [CDateLong]Address: [LPName] [LPAAddress]Dear [LFullName], Your rent is due to increase as agreed in your lease. As of ____...	Leases	Preview	Add
 Clean-up and Large Item Removal Reminder Clean-Up and Large Item Removal ReminderDate: [CDateLong]Address: [LPName] [LPAAddress]Dear [LFullName], Now that you have given us notice of your In...	Leases	Preview	Add
 Settlement Charges Guide Settlement Charges GuideBelow is a list of estimated charges of assorted items or jobs that may sometimes be required after a residence is vacated....	Tenants	Preview	Add
 Tenant Recommendation Letter Tenant Recommendation LetterDate: [CDateLong]Attention: _____ To Whom it May Concern,Let it be known that [LFullName] h...	Leases	Preview	Add
 Eviction and How It Affects You Eviction & How It Affects YouDear [LFullName] As you know, your ...		Preview	Add

To sample what the document looks like when generated, click the **Preview** button.

To use an existing template, you must make a “copy” of it first. To do so, click the **Add** button – this copies the template to the **My Letters & Forms** section at the top of the page:



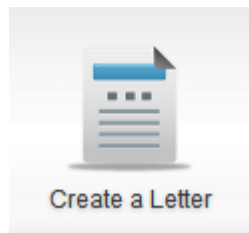
To modify your copy of the template, click the **Edit** button. The [document editor](#) loads.

Creating a New Blank Document

To create a new letter or form, click the **New Document** button at the top of the page:



You can also start a new document from the [Dashboard](#), using the **Create a Letter** button:



When you start a new document, the system needs to know what kind of data will be required. The **What Kind of Data Does Your Document Require** screen loads:

What Type of Data Does Your New Document Require?

- ☒ **Leases, including linked Tenant/Property/Building (default)**
This document will access information about leasing tenants, and all of the associated rent, payment, property and building information that is linked to each tenant.
- ☐ **Tenant Fields Only**
Just tenant data, no linked properties or lease info. Useful for documents about applicants and other non-leasing tenants.
- ☐ **Property Fields Only**
Property info, with info about linked buildings.
- ☐ **Building Fields Only**
Basic building info.

[More Info: which data fields should I use?](#) Start Document

Depending on the type of document you're creating, you will have different data field requirements to be able to properly auto-fill the document text with fields from the database.

If you're creating a simple flyer describing the features and highlights of a property, for example, you'll simply need to add items from the **Property Fields** list. Similarly, a basic letter to all tenants would probably just require **Tenants Fields** like first name, last name, address, telephone number, etc.

For most documents though, you'll need more advanced access to all fields, and

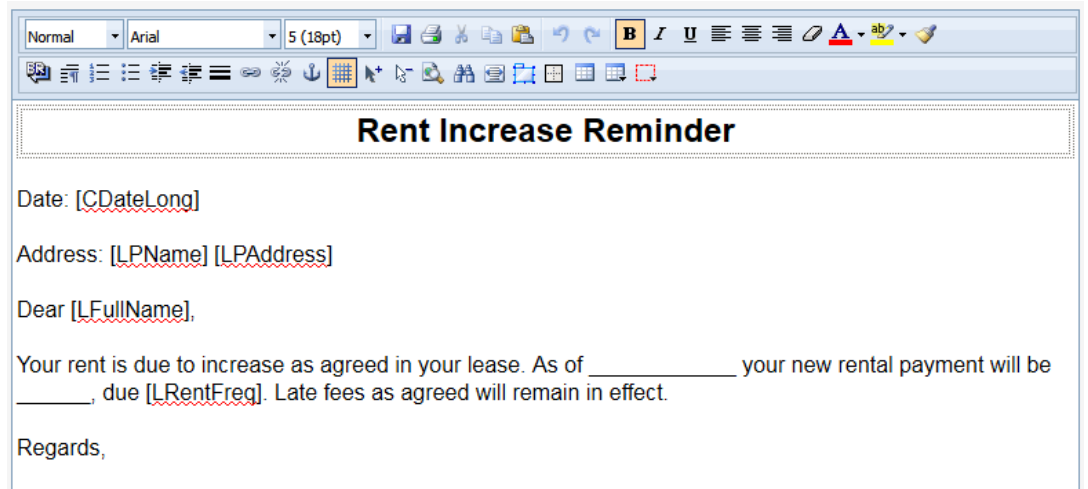
would use the **Lease Fields** - this will ensure that you will be able to generate documents for all Tenants with a lease, and all associated Property and Building information. This will also include pertinent Lease information like start/end dates, rent amount, and payment lists, balance lists, and more advanced types of data.

When in doubt, choose the most comprehensive set of fields, which is Lease Fields. Note that this option will only allow you to generate the document for tenants that have a lease associated to them, either a current one or an expired or closed one.

Make a selection and click **Start Document**. The document editor loads.

Document Editor

The editor for forms & letters is based on HTML. Knowledge of HTML, while helpful, is not required. The document editor presents the document in a “WYSIWYG” (what you see is what you get) format, so editing the document is as basic as editing in Microsoft Word. You can switch to HTML mode to fine-tune the document and how it appears, but this is optional.



The screenshot shows a web-based document editor interface. At the top is a toolbar with various formatting options like bold, italic, underline, and text color. Below the toolbar is a text area containing a document template titled "Rent Increase Reminder". The template includes several fields for personalization, such as [CDateLong], [LPName], [LPAddress], [LFullName], and [LRentFreq]. The text of the document is as follows:

Rent Increase Reminder

Date: [CDateLong]

Address: [LPName] [LPAddress]

Dear [LFullName],

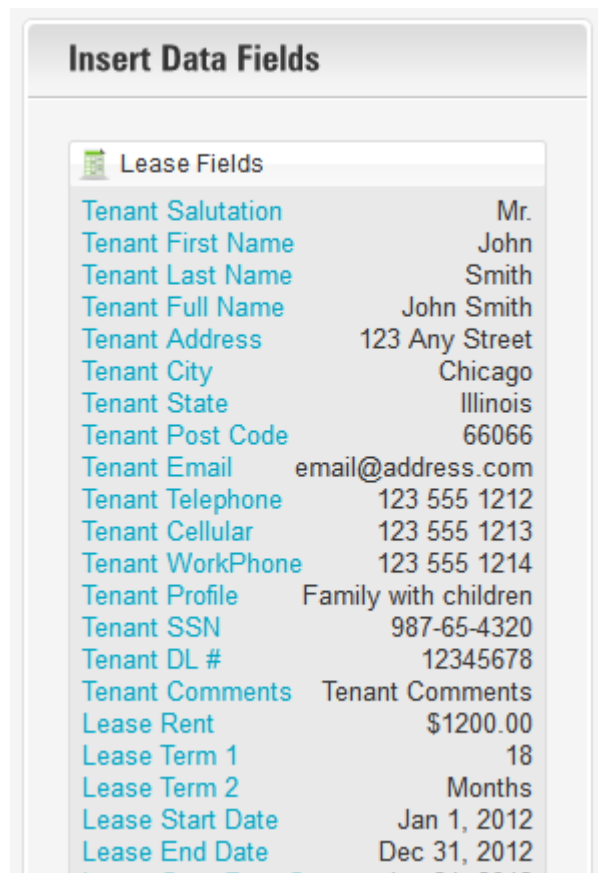
Your rent is due to increase as agreed in your lease. As of _____ your new rental payment will be _____, due [LRentFreq]. Late fees as agreed will remain in effect.

Regards,

You can type (or paste in from another source) the text and layout of the document into the editor, using the editor features and buttons to help style the document how you'd like.

To insert a 123Landlord data field, click to position the cursor exactly where you want the data field to appear in the document.

Then click one of the data fields available on the right hand side of the page:



Numerous data fields are available, ranging from basic tenant contact info to more advanced fields like Current Balance. You can even insert a full table containing

any combination of charges outstanding, including rent and late fees, recurring, fixed, or manual charges, and payment history.


When you are done editing your document, click the **Save & Close** button:

Save & Close

Printing a Document

To print a document, which will also pre-populate any fields you have added with data from the database, first click it to select it:

My Letters & Forms

Document Name	Type of Data	Preview
 Rent Increase Notice (Copy) Rent Increase ReminderDate: [CDateLong]Address: [LPName] [LPAddress]Dear [LFullName], Your rent is due to increase as agreed in your lease. As of ____...	Leases	Preview Edit ✕

Note that you can only select & print documents in the **My Letters & Forms** section.

Then click the **Print / Email Document** button:

Print / Email Document

The **Print or Email Document Options** screen appears:

Print or Email Document (or PDF) - Options

Select Tenants

Choose which tenants should be added to this document. A separate document will be generated using the data stored for each tenant you specify below. **Only tenants with leases are shown.**

Leasing Tenants

All

Tenants On This Document

No Tenants Selected (Blank Document)

Replace Blanks & Empty Fields

Information may not be completely entered for some database records, or might not be applicable for some data fields - what should this be replaced with?


☒ Blank line
☐ Empty box
☐ Custom text
☐ Nothing

Download PDF File

Now you must select which tenants, properties, or buildings the document should be generated and printed for.

You will only be able to select tenants, properties, or buildings based on the type of data you originally selected as applicable to the document when you created it.

For example, if (when you created the document) you originally selected “Leases” as the type of data required, you will be able to select “Leasing Tenants” from the dropdown list above. If you selected “Tenant” data, then you will be able to print this document for all tenants, regardless of whether they are in a lease or not. Similarly, if you selected “Properties” data, you’ll be able select one or more properties to generate and print the document for.

To add tenants/properties/etc to the document, click the drop-down list and select one. Then click the **arrow** button  to move them over to the right side of the screen, which indicates the document will be printed for this tenant/property/etc:

Leasing Tenants		Tenants On This Document
<div style="border: 1px solid #ccc; padding: 2px; display: inline-block;">Mark Bartlett</div> <div style="border: 1px solid #ccc; width: 20px; height: 20px; display: inline-block; vertical-align: middle; margin-left: 5px;"></div>		Mark Bartlett ✕

To generate and print the document for **all** tenants/properties/etc, select “All” from the drop-down and click the arrow:

Leasing Tenants		Tenants On This Document
<div style="border: 1px solid #ccc; padding: 2px; display: inline-block;">All</div> <div style="border: 1px solid #ccc; width: 20px; height: 20px; display: inline-block; vertical-align: middle; margin-left: 5px;"></div>		All Tenants ✕

When the document is being generated, often certain tenants or properties won't always have actual data entered for certain fields. In these cases, you should indicate how these 'blanks' will be handled:

Replace Blanks & Empty Fields

Information may not be completely entered for some database records, or might not be applicable for some data fields - what should this be replaced with?

☒ Blank line
 ☐ Empty box
 ☐ Custom text ☐ Nothing

You can choose to show a blank line, an empty box, some custom text, or nothing at all.

Once you're ready to generate the document for all selected tenants/properties/etc, click the **Download PDF File** button.

The document is generated, pre-populated, converted to PDF, and pushed to the browser, where you can download it (and email it) or print it.

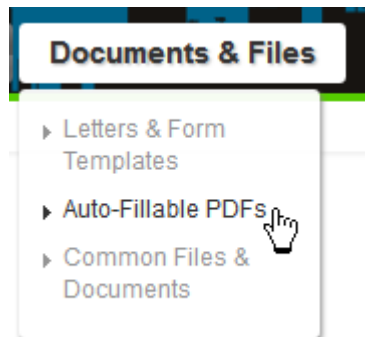
Auto-Fillable PDFs

In addition to HTML documents, 123Landlord will let you work with existing PDF files you may have. Often, state forms and lease templates that you may have acquired or purchased are in PDF format. And usually, these PDFs have embedded form fields in them, which allow you (in Adobe Acrobat Reader) to enter information directly into the PDF prior to printing it.

With 123Landlord, you can upload these PDFs and connect the **preexisting PDF form fields (that are embedded already)** to data fields in the system.

To do so, first you need a PDF that has form fields embedded in it, and then you need to upload it to 123Landlord.

To access this area of the system, hover over the **Documents & Files** button on the Main Toolbar, and click **Auto-Fillable PDFs**:



Uploading the PDF

To upload the PDF form, click **Upload New PDF**:



The **Upload New PDF Document** screen appears:

Upload New PDF Document

Type of Data Required

Lease




Select PDF File

Select PDF File

Upload

Select the type of data fields required (normally “Lease” covers everything you’d usually need) and click **Select PDF File** to browse to the PDF file you want to upload. Select it and click OK. Then click the **Upload** button.

The file is uploaded to your 123Landlord account.

All PDFs			
Filename & Comment		Data Fields Used	
	Residential Lease.pdf	Leases	<div>Preview</div> <div>Edit Data Fields</div> <div>✕</div>
	SampleRoomRentalAgreementJan2012.pdf	Leases	<div>Preview</div> <div>Edit Data Fields</div> <div>✕</div>
	updated_IDS.pdf	Leases	<div>Preview</div> <div>Edit Data Fields</div> <div>✕</div>

To see a preview of what the PDF looks like, click **Preview**.

The document is displayed in preview mode:



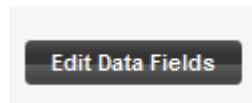
The screenshot shows a web browser window displaying a document titled "RESIDENTIAL TENANCY AGREEMENT (Fixed Term Tenancy)". The document contains several data fields for user input:

- A line for the date: "THIS AGREEMENT made in duplicate the _____ day of _____, 200 _____."
- A section labeled "BETWEEN:" followed by two lines for the Landlord: "[Designate Of Each Owner On Title], individuals resident in _____" and "(hereinafter either individually or collectively referred to as the 'Landlord')".
- A line for the Tenant: "[Names Of Each Tenant], individuals resident in _____" and "(hereinafter either individually or collectively referred to as the 'Tenant')".

The form is presented in a light gray box with a close button in the top right corner.

Adding/Editing Data Fields

To link 123Landlord data fields to the form fields embedded in the document, click the **Edit Data Fields** button:



The **Edit Data Fields** page loads:

updated_IDS.pdf

Font Setting

Select the font for auto-filled text:

Match PDF Fields → Database Fields

[Show Field Reference](#) [Add Database Field](#) [Add Custom Field](#)

Select PDF Field #

Map To Database Field

PDF Field Legend (PDF field numbers in yellow)

Doc code: IDS
Doc description: Information Disclosure Statement (IDS) Filed
Under the Paperwork Reduction Act of 1995, no persons are required to respond to a collection of information unless it contains a valid OMB control number.

Approved for use through 07/31/2012. OMB 0057-0002
U.S. Patent and Trademark Office, U.S. DEPARTMENT OF COMMERCE

Application Number	<input type="text" value="1"/>
Filing Date	<input type="text" value="2"/>
First Named Inventor	<input type="text" value="3"/>
Art Unit	<input type="text" value="4"/>
Examiner Name	<input type="text" value="5"/>
Attorney Docket Number	<input type="text" value="6"/>

U.S. PATENTS [Remove](#)

Each page of the PDF is displayed as a thumbnail or preview image.


You can specify the font used to populate data fields by selecting it:

Select the font for auto-filled text:

If the PDF form you uploaded does not contain any embedded form fields, you will not be able link 123Landlord data to it. Make sure the form you are using has form fields already embedded in it before you upload it.

Contact the producer of the form to ensure that the PDF you're going to use has form fields in it, or you can add your own using Adobe Acrobat (full version, not the Reader version). Adding form fields to PDF documents is beyond the scope of this manual.

You will see this notice if the PDF you are using does not have any usable form fields:

 This PDF contains no fillable fields. If you have it installed, open the document in **Adobe Acrobat** (you'll need the full version, not just Acrobat Reader), add editable form fields, and upload this file again. Alternatively, contact the publisher of this PDF to obtain a version that has fillable fields.

If your PDF has form fields embedded, they will be indicated in the preview images for each page of the PDF:

PTO/SB/008a (01-10)
 Approved for use through 07/31/2012, OMB 0651-0031
 U.S. Patent and Trademark Office; U.S. DEPARTMENT OF COMMERCE
 It is to respond to a collection of information unless it contains a valid OMB control number.

r		1
		2
or		3
		4
		5
umber		6

These numbers are overlaid by 123Landlord to show where each embedded form field is positioned in the PDF file.

You link these numbers to 123Landlord data fields by matching fields:

Match PDF Fields ➔ **Database Fields**

[Show Field Reference](#)
[+ Add Database Field](#)
[+ Add Custom Field](#)

Click **Add Database Field** to create your first field linkage:

Select PDF Field #

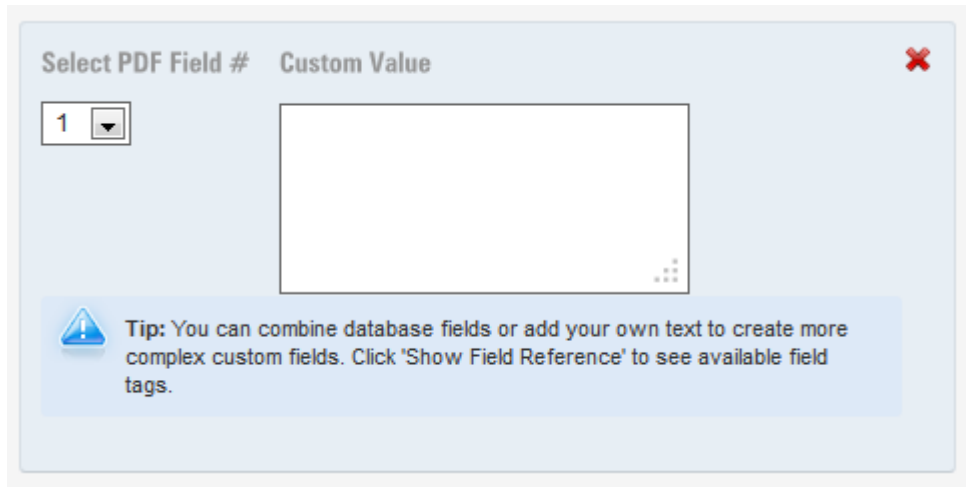
Map To Database Field

✖

Select the PDF field # (refer to the yellow field numbers overlaid on each page image) and the 123Landlord database field that will be matched to it. When the document is printed, tenant or property-specific data for that 123Landlord data field will be entered in the place of this PDF form field.

Tip: click **Show Field Reference** to view a list of applicable 123Landlord database fields you can add linkages to.

You can add more advanced data linkages by combining fields or entering your own custom text – click **Add Custom Field** to do so:



As before, select the PDF field #, and enter a custom value that will be printed in its place. You can combine 123Landlord database field tags (for example, [LSSNum] / [LDLNum]) or any text you'd like to appear.

To easily add database fields to the Custom Value textbox, click into the textbox to position the cursor, and then click a database field from the field reference list. You'll need to click **Show Field Reference** first if the field reference is not already visible.

Once you have added and linked all the PDF fields you need auto-populated, click the **Save Fields & Close** button:

Save Fields & Close

Now you're ready to generate and print the PDF. Back on the Auto-Fillable PDFs page, click to select your PDF and click the **Print/Email PDF** button to do so:

Print / Email PDF

The **Print Or Email PDF Options** screen appears:

Print or Email Document (or PDF) - Options

Select Tenants
Choose which tenants should be added to this document. A separate document will be generated using the data stored for each tenant you specify below. **Only tenants with leases are shown.**

Leasing Tenants

All

▼

→

Tenants On This Document


No Tenants Selected (Blank Document)

Download PDF File

Now you must select which tenants, properties, or buildings the PDF should be generated and printed for.

You will only be able to select tenants, properties, or buildings based on the type of data you originally selected as applicable to the PDF when you created it.

For example, if (when you uploaded the PDF) you originally selected “Leases” as the type of data required, you will be able to select “Leasing Tenants” from the dropdown list above. If you selected “Tenant” data, then you will be able to print this PDF for all tenants, regardless of whether they are in a lease or not. Similarly, if you selected “Properties” data, you’ll be able select one or more properties to generate and print the document for.

To add tenants/properties/etc to the PDF, click the drop-down list and select one. Then click the **arrow** button  to move them over to the right side of the screen, which indicates the PDF will be printed for this tenant/property/etc:

Leasing Tenants		Tenants On This Document
<input type="text" value="Mark Bartlett"/>		Mark Bartlett 

To generate and print the PDF for **all** tenants/properties/etc, select “All” from the drop-down and click the arrow:

Leasing Tenants		Tenants On This Document
<input type="text" value="All"/>		All Tenants 

Once you’re ready to generate the PDF for all selected tenants/properties/etc, click the **Download PDF File** button.

The PDF is generated, pre-populated, and pushed to the browser, where you can download it (and email it) or print it.