



Landlord Property Manager V9 – New Features User Guide



Award Winning Software – Designed by Landlords
for Landlords.

www.propertyportfoliosoftware.co.uk

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Landlord Property Manager

The aim of this guide is to take you through the updates that have been released through the Landlord Property Manager v9 solution.

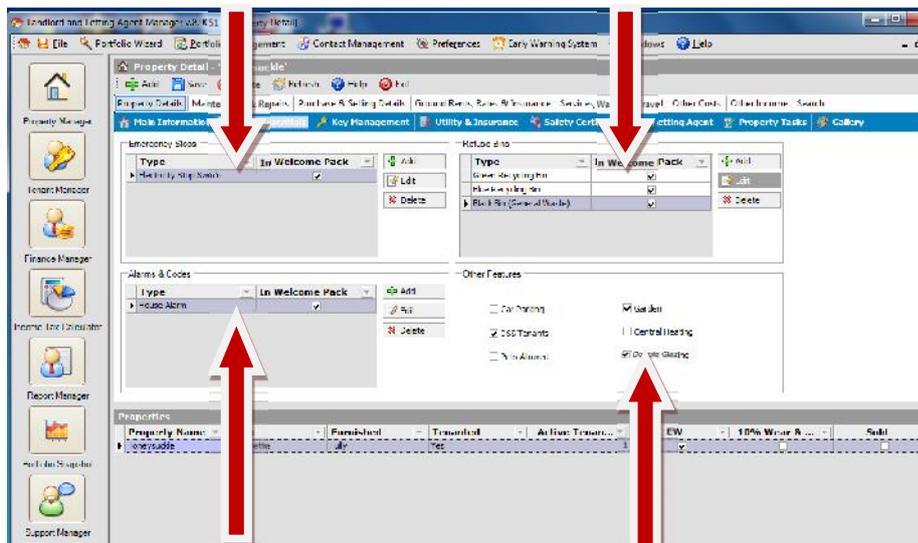
This tutorial goes through a case study showing you the new functionalities within this software.

1. Property Essentials

The Property Essentials tab can be found at the second blue tab within Property Manager and once opened has four areas:

Emergency Stops

2) Refuse Bins



3) Alarms & Codes

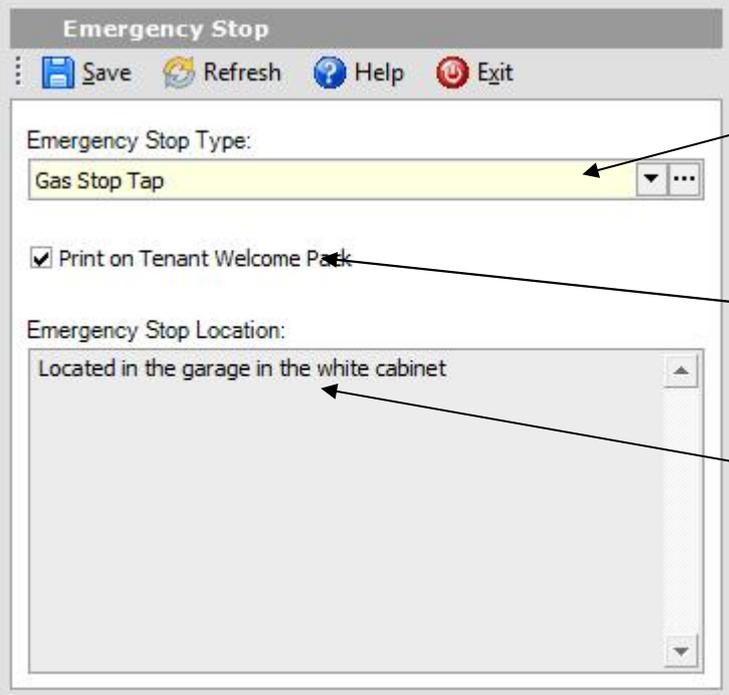
4) Other Features

1.1. Emergency Stops

This area enables you to record the position of all emergency stop taps within the property, e.g. water stop taps, gas meter taps. It is essential your tenants are able to turn off supplies if the need arises with the minimum amount of hassle.

To set-up an emergency stop click on the “Add” button.

You can then enter the details of the emergency stop.



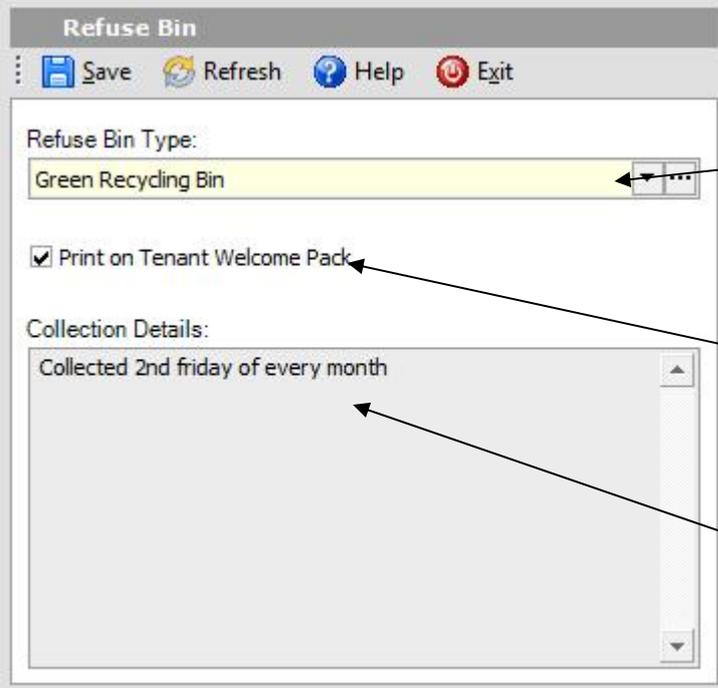
The screenshot shows a dialog box titled "Emergency Stop" with a menu bar containing "Save", "Refresh", "Help", and "Exit". The main content area includes:

- Emergency Stop Type:** A dropdown menu currently showing "Gas Stop Tap". A callout box points to this dropdown with the text: "Choose the type of emergency stop, or add your own."
- Print on Tenant Welcome Pack:** A checked checkbox. A callout box points to it with the text: "If you want the details of the stop tap to print on the Tenant Welcome Pack, chose this flag."
- Emergency Stop Location:** A text area containing the text "Located in the garage in the white cabinet". A callout box points to this text area with the text: "Enter the details i.e. the location of the stop tap here."

1.2. Refuse Bins

This area enables you to record information such as the different types of refuse bins there are and also the collection days. With the increasing number of refuse collection bins and different collection days it is important you keep this information in one central place.

To set-up refuse collection bins and their deliver days click on the “Add” button.



The screenshot shows a window titled "Refuse Bin" with a menu bar containing "Save", "Refresh", "Help", and "Exit". The main content area is divided into three sections:

- Refuse Bin Type:** A dropdown menu with "Green Recycling Bin" selected. To the right of the dropdown is a small button with three dots.
- Print on Tenant Welcome Pack:** A checkbox that is checked.
- Collection Details:** A text area containing the text "Collected 2nd friday of every month".

Choose the type of refuse bin, or add your own.

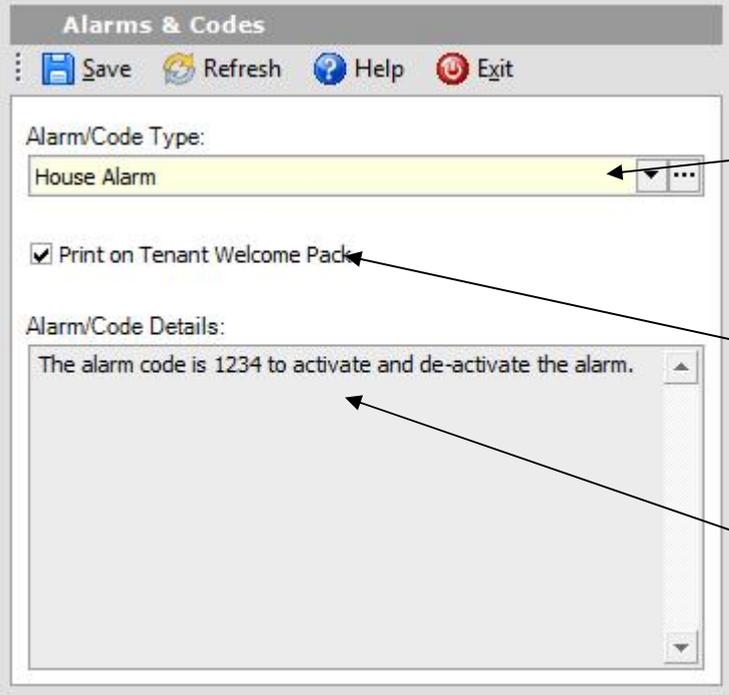
If you want the details of the refuse bin to print on the Tenant Welcome Pack, chose this flag.

Enter the details i.e. when the bin is collected.

1.3. Alarms & Codes

This area enables you to record the type of alarm and access code details associated with the property.

To enable this function click on the “Add” button.



The screenshot shows a window titled "Alarms & Codes" with a menu bar containing "Save", "Refresh", "Help", and "Exit". The main area is divided into three sections:

- Alarm/Code Type:** A dropdown menu currently showing "House Alarm". A callout box points to the dropdown arrow with the text: "Choose the type of alarm code, or add your own."
- Print on Tenant Welcome Pack:** A checkbox that is checked. A callout box points to it with the text: "If you want the details of the alarm code to print on the Tenant Welcome Pack, chose this flag."
- Alarm/Code Details:** A text area containing the text "The alarm code is 1234 to activate and de-activit the alarm." A callout box points to this text with the text: "Enter the details i.e. hot to set the alarm code."

1.4. Other Features

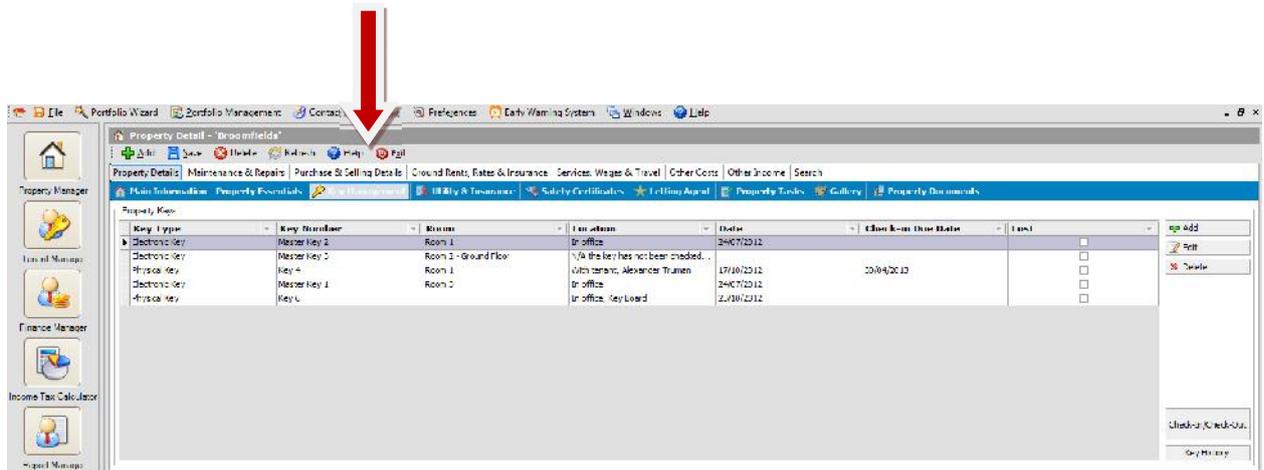
In the 'Other Features' section it is possible to set flags to indicate to prospective tenants what features the property has. For example, if the property has double glazing, you would set the "Double Glazing" flag.

Other Features

<input checked="" type="checkbox"/> Car Parking	<input type="checkbox"/> Garden
<input checked="" type="checkbox"/> DSS Tenants	<input type="checkbox"/> Central Heating
<input checked="" type="checkbox"/> Pets Allowed	<input checked="" type="checkbox"/> Double Glazing

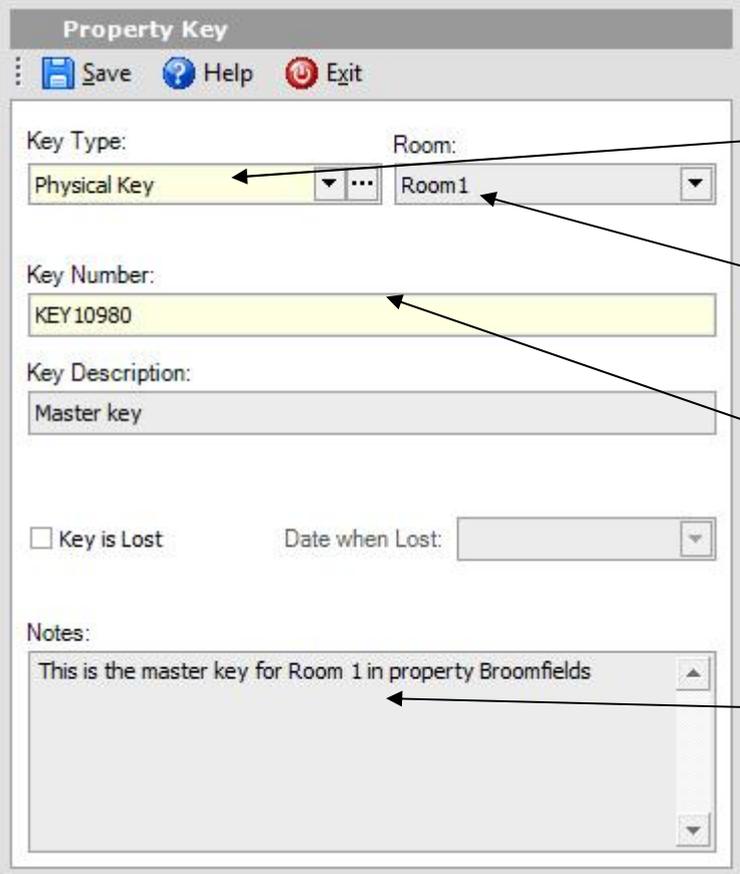
2. Key Management

The 'Key Management' is a solution for managing the whereabouts of property keys including booking-in and booking-out and can be found at the third blue tab within Property Manager (as illustrated above). If you have a number of keys for a property, then it is important to be able to record the whereabouts of them.



2.1. Creating Keys

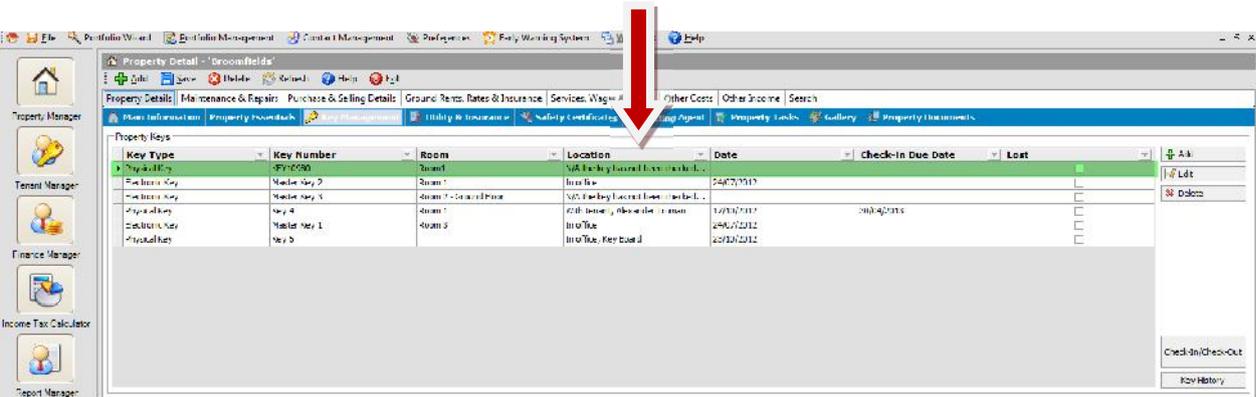
To set-up a Key you press the 'Add' Button:



The screenshot shows the 'Property Key' form with the following fields and callouts:

- Key Type:** A dropdown menu with 'Physical Key' selected. Callout: "Choose the type of key, or add your own."
- Room:** A dropdown menu with 'Room 1' selected. Callout: "If the key is for a specific room, specify which room."
- Key Number:** A text field containing 'KEY 10980'. Callout: "Give the key a unique reference, followed by a description."
- Key Description:** A text field containing 'Master key'.
- Key is Lost:** A checkbox that is currently unchecked.
- Date when Lost:** A date picker field.
- Notes:** A text area containing 'This is the master key for Room 1 in property Broomfields'. Callout: "Any notes you want to record about the property can be entered here."

Press 'Save' and the key will be added to list of other keys for the property.

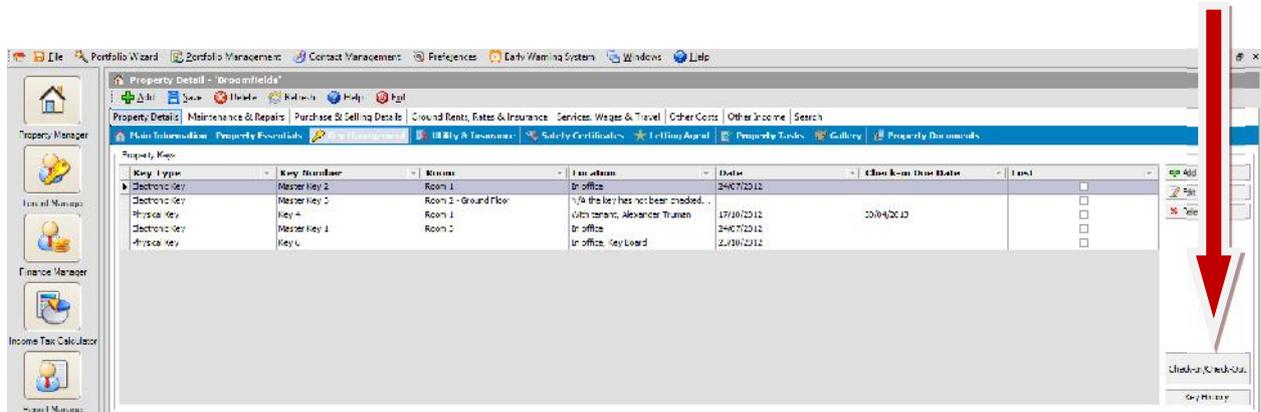


The screenshot shows the 'Property Detail' window for 'Broomfields'. A red arrow points to the 'Add' button in the 'Property Keys' table. The table contains the following data:

Key Type	Key Number	Room	Location	Date	Check-In Due Date	Lost
Physical Key	KEY 10980	Room 1	100 King Street, Broomfields	24/07/2019		<input type="checkbox"/>
Master Key	Master Key 2	Room 2				<input type="checkbox"/>
Master Key	Master Key 3	Room 3 - Secured Room	S/O Farley Local Bus stop			<input type="checkbox"/>
Physical Key	Key 4	Room 4	20th Century Newlands House	12/03/2017	2004/2015	<input type="checkbox"/>
Master Key	Master Key 1	Room 5	Bro'Bus	24/07/2012		<input type="checkbox"/>
Physical Key	Key 5	Room 5	Bro'Bus, Key box d	22/02/2012		<input type="checkbox"/>

2.2. Check-in/Check-out of a Key

Once a key has been created, it then becomes necessary to track the whereabouts of a key. For example when a tenant moves in, you may give them one or two sets of keys. It is important you are to record this information and can do so via the 'Check-in/Check-out' button.



On this screen you can enter the check-in/check-out date and the location of the key.

The 'Key Check-In/Check-Out' dialog box contains the following fields:

- Date:** A date picker showing 31/10/2012.
- Key Location:** Radio buttons for 'In Office' (selected), 'With Tenant', and 'With Contact'.
- Location in Office:** A dropdown menu with an ellipsis button.
- Notes:** A text area for entering additional information.

If you select the location of the key as the office you are able to select where the key is located within the office.

Key Check-In/Check-Out

Save Help Exit

Date:
31/10/2012

Key Location

In Office
 With Tenant
 With Contact

Tenant:
Alexander Truman

Check-in Due Date:
30/04/2013
 Use the tenancy end date

Notes:

If you select the location of the key as with Tenant then you are able to enter tenant information and also the Check-in Due Date.
If you check the "Use the tenancy end date" box this date will be inserted automatically into the "Check-in Due Date".

Key Check-In/Check-Out

Save Help Exit

Date:
31/10/2012

Key Location

In Office
 With Tenant
 With Contact

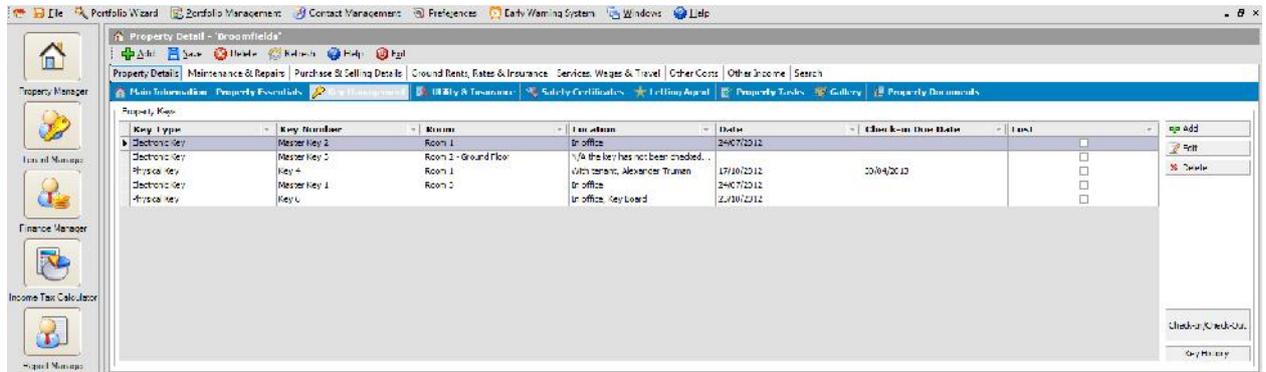
Contact:
H. Garde & Son

Check-in Due Date:
30/04/2013

Notes:

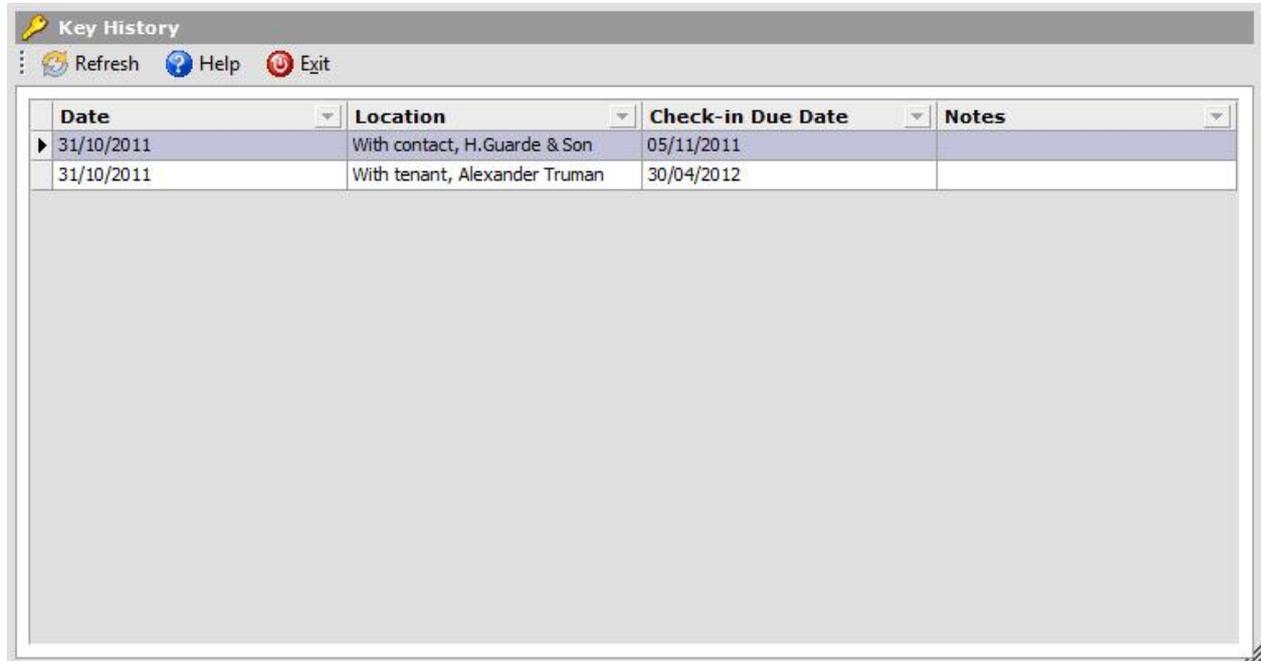
You can also allocate a key to a contact in your contact list and then set the check-in due date accordingly.

Once the keys have been checked-in/out, you are able to clearly see where each key is:



2.3. Key History

The Key History button when pressed opens up to show you a history of the recorded events of the key.



Date	Location	Check-in Due Date	Notes
31/10/2011	With contact, H.Guarde & Son	05/11/2011	
31/10/2011	With tenant, Alexander Truman	30/04/2012	

3. Tenant Management Changes

A number of enhancements have been made to the 'Tenant Management' module and these include:

- Ending Tenancy Early - Calculating Daily Rental
- Change Rent Functionality Enhancement to change individual rents
- Changing the payment Term Midway through Tenancy
- Capturing a Tenant Forwarding Address
- Storing all emails that are sent from the mail merge solution in the Tenant Journal
- Property / Room address (Tenant's contact information i.e. Telephone and email address)
- New payment term added to allow for four monthly payments

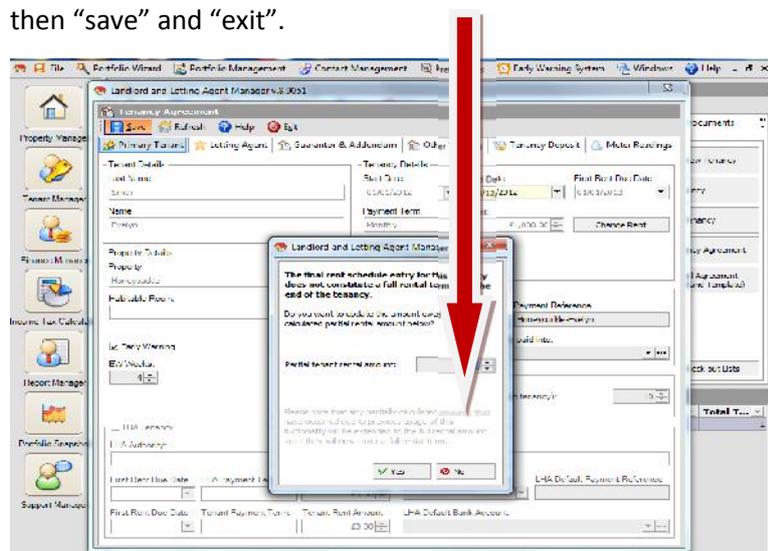
3.1. Ending Tenancy Early - Calculating Daily Rental

Prior to this update when a tenancy was ended early a calculation had to be made, manually, as to how much rent was owed over a partial rent period, say 3 weeks of a monthly rental period or 3 days of a weekly rental period. The Landlords Property Manager now automatically works this out for you.

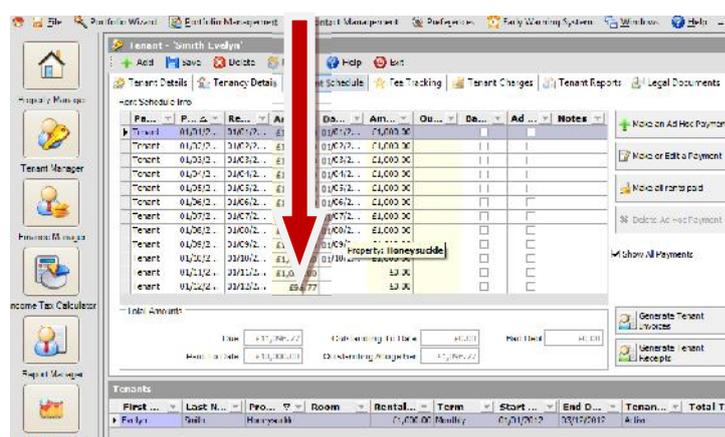
To end a tenancy early you would as usual go to:

Tenant Manager → Tenancy Details → Select Tenant → Edit Tenancy → End Date → Save → Yes → OK.

This window opens which shows you the partial tenant rental amount and you will click on “yes” and then “save” and “exit”.

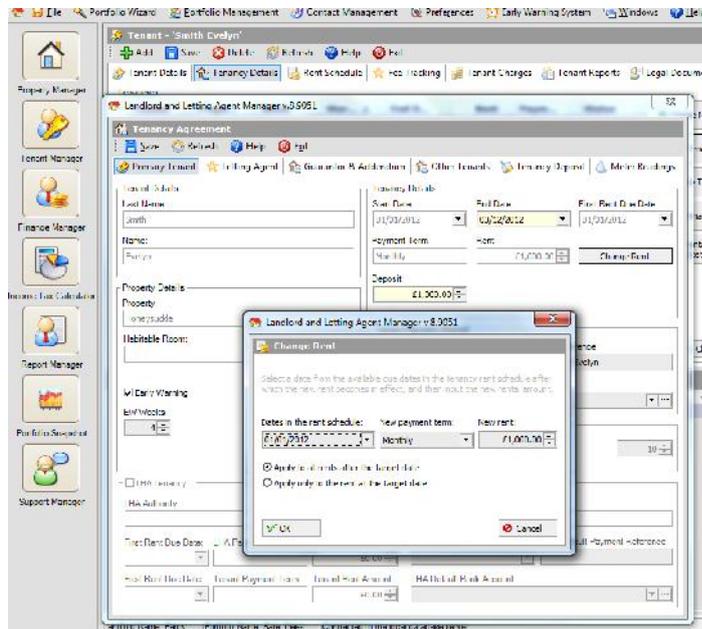


You can see in the rent schedule that the partial payment has been inserted.

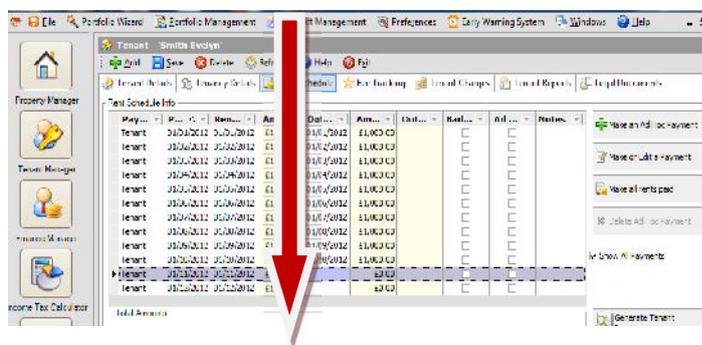


3.2. Change Individual Rents Entries

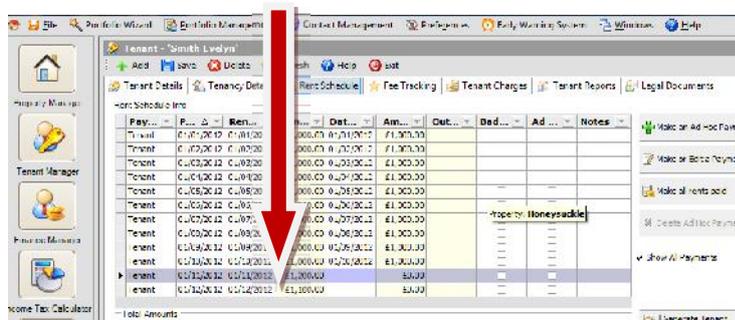
You can now easily change the rent amount with this enhancement for a single rent schedule entry. Click on Tenant Manager → Edit Tenancy → Change Rent, and the following window is displayed:



Enter the new rent and you have two options to decide how you want the change to be applied. You can either “Apply to all rents after the target date”. If you select this the rent schedule will show the new rent from the date you selected for all subsequent rents:



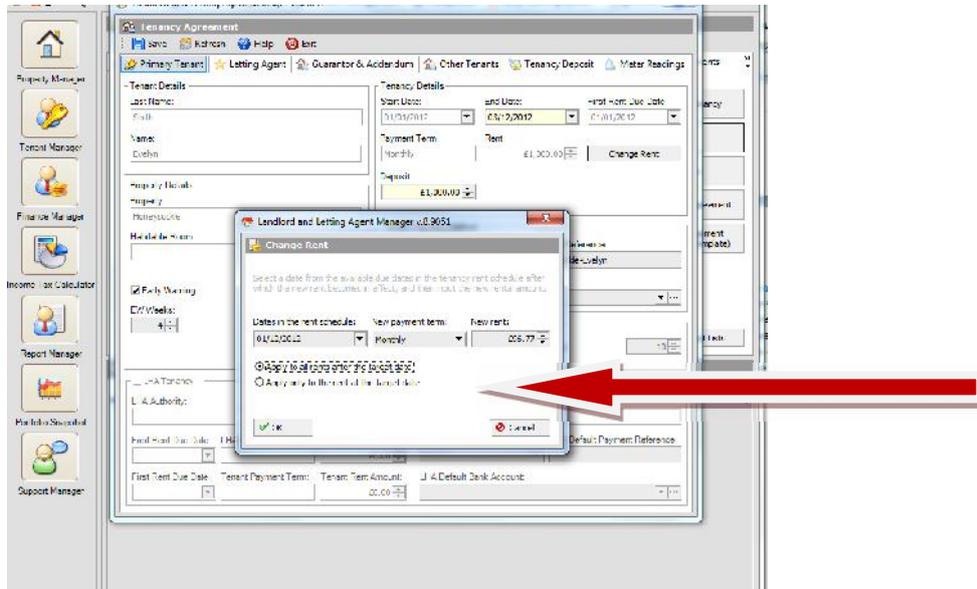
Should you select “Apply only to the rent at the target date” then once you have changed the date and clicked “ok” the rent schedule will show the rent change for that one rent schedule only:



3.3. Changing Payment Term During A Tenancy

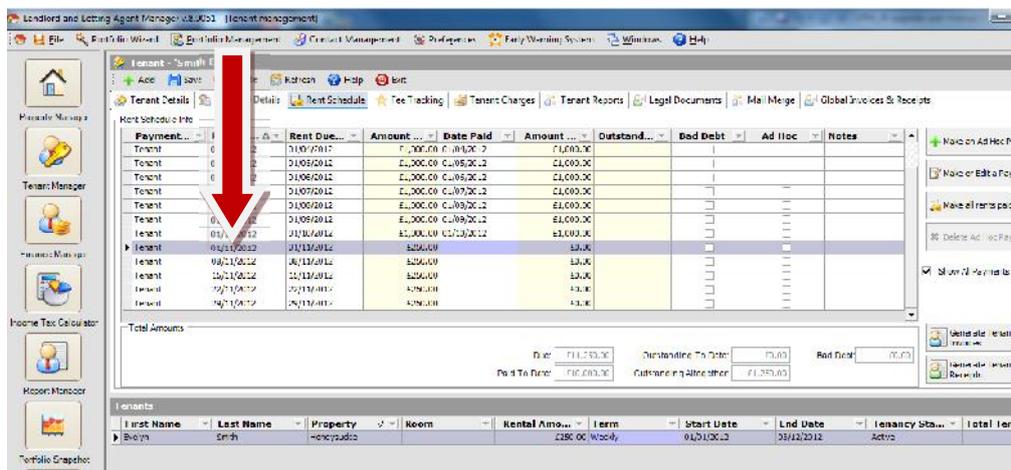
Historically the software was unable to let the user change the tenant's payment term once the tenancy had been created. Now with this enhancement you have the ability to change the tenant's payment term during the existing tenancy as many times as is required.

To use this function click on Tenant Manager → Tenancy Details → Edit Tenancy → Change Rent and you will see the following window open:



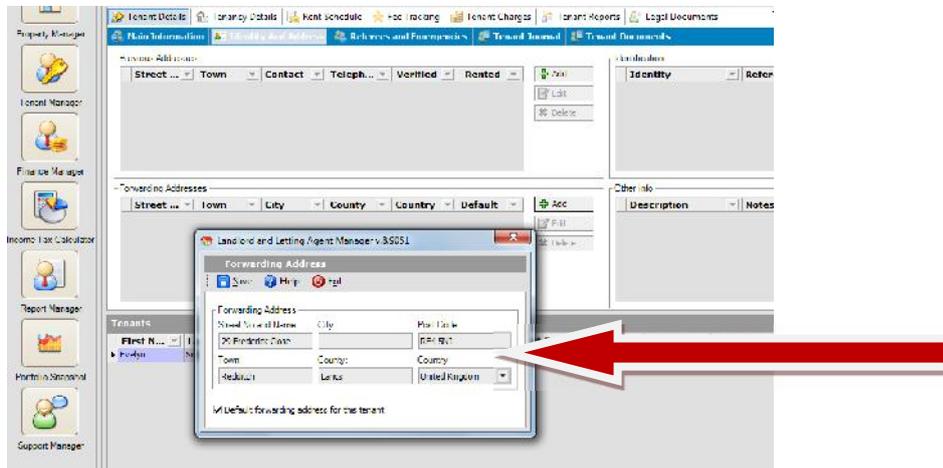
There is an option to change the payment term for example from monthly to weekly. You must enter the rent figure and the date from when the new payment term is to apply.

Click on "ok". A message appears to let you know that the rent was changed successfully, click on "exit" then click on "rent schedule" and view the changes:



3.4. Capturing a Tenant Forwarding Address

A useful record to have is a tenant’s forwarding address, so that you can communicate with them or forward them mail that is still coming to the property. You can do this by clicking on Tenant Manager → Identity and Address. You will see the screen is split and you need to click on the “Add” button at the right hand side of “Forwarding Addresses” block.

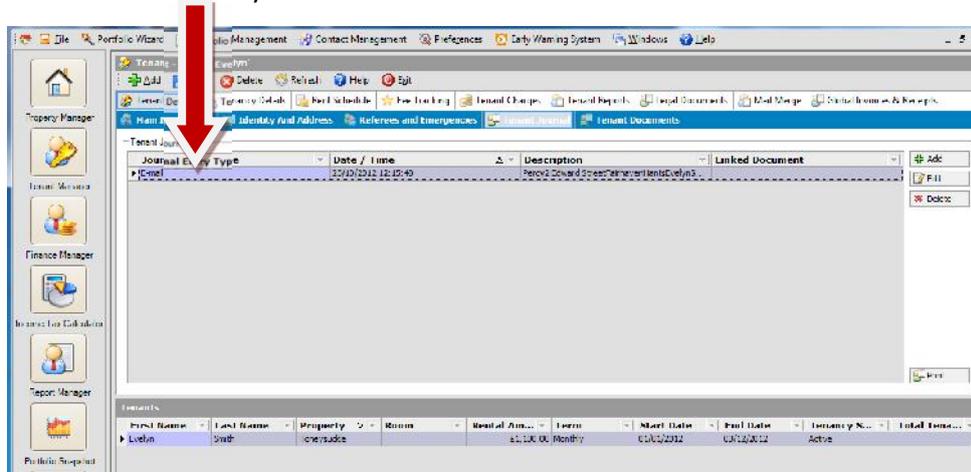


Place a tick into the “Default forwarding address for this tenant and any correspondence for this former tenant which is created in mail merge will be automatically addressed to this forwarding address. You have the option to leave the box unticked or remove the tick at a later date.

The tenant forwarding address fields now also appear in the ‘Mail Merge’ section, so you still communicate with them through the software.

3.5. Automatic Saving of Emails in Tenant Journal

When you send an email from the mail merge option a copy of the email is placed into the Tenant Journal automatically:



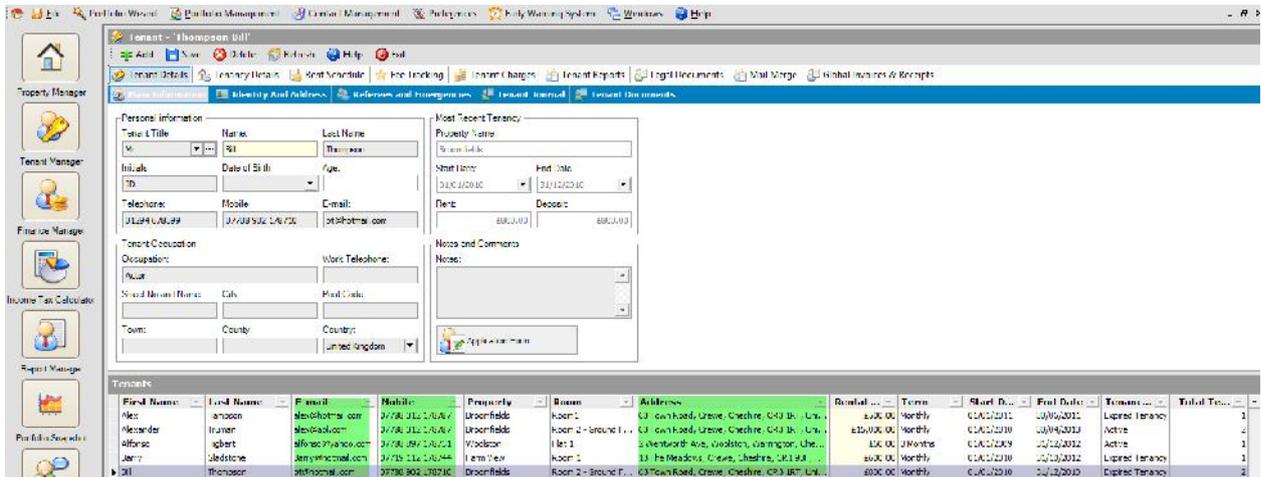
3.6. Tenant Manager – More Information

In the Tenant manager Screen, additional data is displayed including:

The email address of the tenant

The mobile telephone number for the tenant

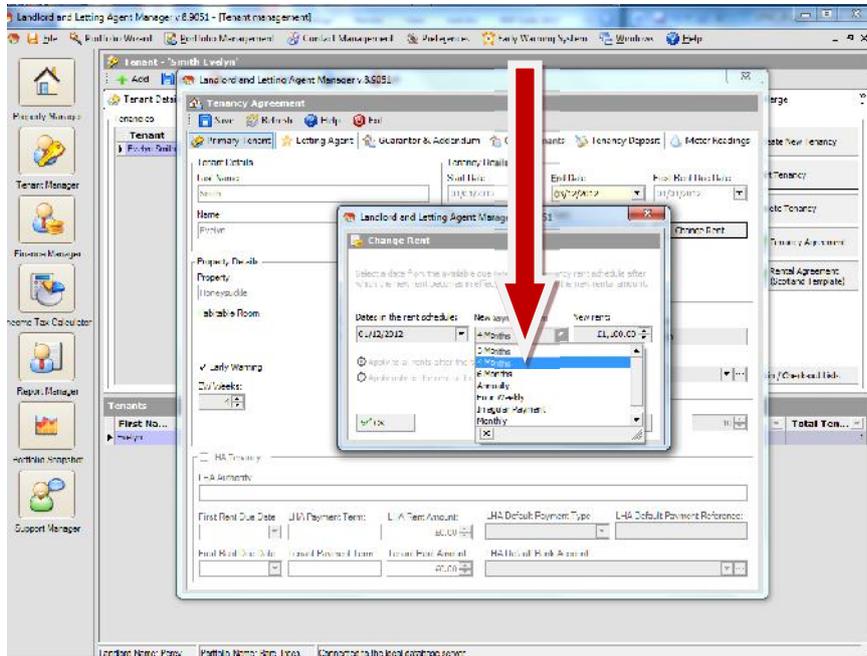
The property address the tenant is allocated to



Remember, you can print this list, using our 'Smart Print' feature. Just simply right click your mouse over the display list and you will have an option to print the list. You can then either print the list to your local printer or save it as a file e.g. Excel, MS Word etc.

3.7. New Four Monthly Payment Term

Included in the payment term option is a 4 Month option specifically for those rents which are due on a quarterly basis.



4. Improvement for HMO / Multi-Let Properties

One of the key benefits of Landlords Property Manager is that it makes managing Multi-let properties easy. We have now added the following new features:

- Ability to see 'Room Occupancy' in Portfolio Snapshot
- Detailed new HMO Room Occupancy Report
- When starting software, tenants who are assigned to properties with HMO rooms are asked to assign to HMO room

4.1. Ability to see 'Room Occupancy' in Portfolio Snapshot

Previously on the Portfolio Snapshot it was not possible to display room occupancy when portfolios had HMSOs. As you can see from the following image you are now able to do so.

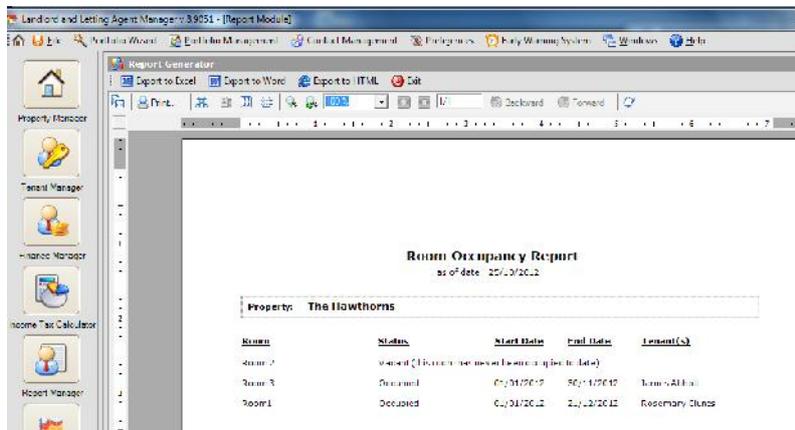


4.2. New HMO Room Occupancy Report

Within the Portfolio Snapshot you can now create a “Room Occupancy Report” by clicking on the “View Detailed Report” link which opens a window allowing you to choose one of three options:



Choose “Show all rooms” and the following report is produced:



Choose “Show occupied rooms only” and the following report is produced:

Landlord and Letting Agent Manager v2.9051 - [Report Module]

Report Generator

Export to Excel | Export to Word | Export to HTML | Edit

Room Occupancy Report
as of date: 25/10/2012

Property: The Howthorns

Room	Status	Start Date	End Date	Tenant(s)
Room 5	Occupied	01/01/2012	30/01/2012	Mrs. J. Smith
Room 1	Occupied	01/01/2012	31/12/2012	Mrs. J. Jones

Choose “Show vacant rooms only” and the following report is produced:

Landlord and Letting Agent Manager v2.9051 - [Report Module]

Report Generator

Export to Excel | Export to Word | Export to HTML | Edit

Room Occupancy Report
as of date: 25/10/2012

Property: The Howthorns

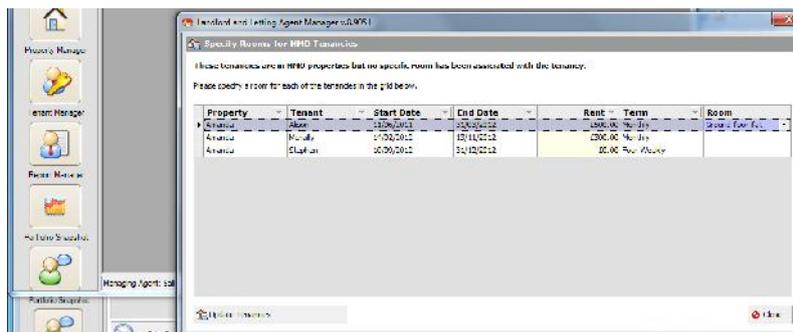
Room	Status	Start Date	End Date	Tenant(s)
Room 2	Vacant (this room has never been occupied to date)			

4.3. Assigning HMO Rooms on Start-up

When the software is opened for the first time after the version 9 update then any tenants that have been assigned to a property with HMO rooms, but the room has not been specified against the tenancy will need to assign the rooms.

This is required so that the occupancy reports can give a true picture of the property/room occupancy.

This screen displayed below will continue to be displayed at each occurrence of the software being opened until all the rooms have a tenant assigned to it.



5. Early Warning System Changes

The following changes have been made to the Early Warning system:

- Transaction Drilldown
- Room added to the expiring tenancies tab

5.1. Transaction Drilldown

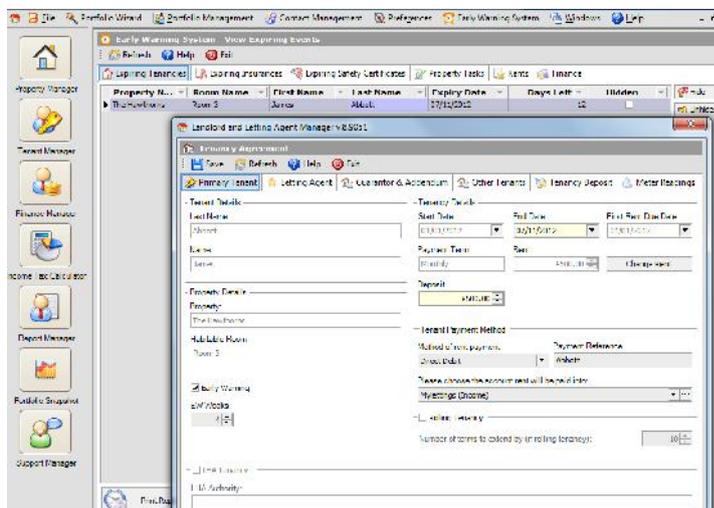
In the 'Early Warning' system, you now have the ability to double click on:

- Expiring Tenancies
- Expiring Insurances
- Expiring Safety certificates

and jump straight to the relevant transaction.

Click onto the tab "Early Warning System" → View EW Events → Expiring Tenancies and you can see a list of those tenancies due to expire within the range that you have previously set.

Double click in one of the record lines and it takes you to the "Tenancy Agreement" screen as so:

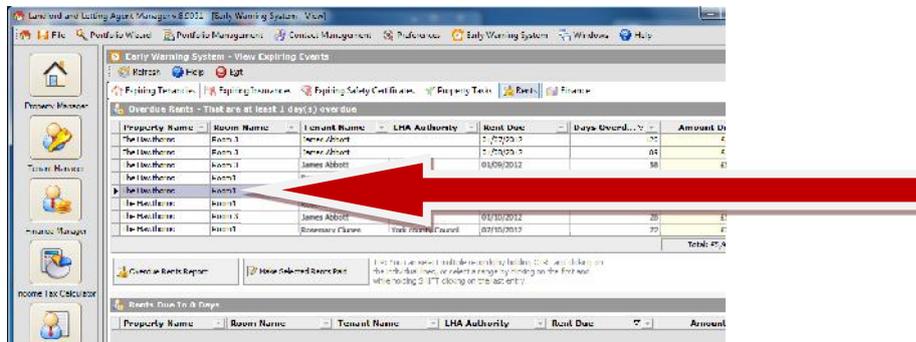


Similarly if you click on the "Expiring Insurances" tab and double click on one of the record lines then you will be taken to the actual insurance details.

And if you click on the 'Expiring Safety Certificates' tab you can drilldown to the safety certificate detail.

5.2. Room Added to Expiring Tenancies Tab

Not only can you view expiring tenancies but this screen also displays any expiring room tenancies too:



The screenshot shows the 'Early Warning System - View Expiring Events' window. The main table displays 'Overdue Rents - That are at least 1 day(s) overdue'. A red arrow points to the row for 'The Millstone Room 3'.

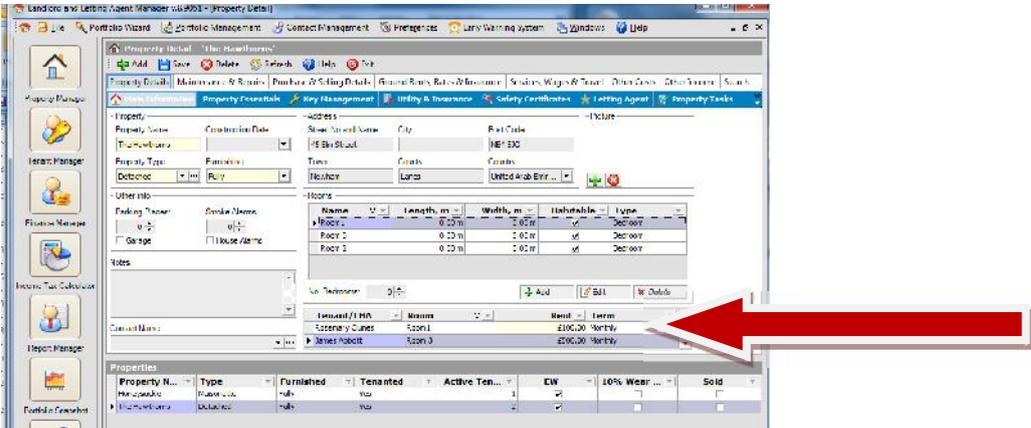
Property Name	Room Name	Tenant Name	LHA Authority	Rent Due	Days Overdue	Amount Due
The Millstone	Room 1	James Abbott		01/05/2012	15	£
The Millstone	Room 1	James Abbott		01/05/2012	05	£
The Millstone	Room 1	James Abbott		01/05/2012	58	£
The Millstone	Room 3					
The Millstone	Room 3	James Abbott		01/01/2012	20	£
The Millstone	Room 3	James Abbott	York 20090 Council	07/10/2012	20	£
						Total: £58

Below the table, there are buttons for 'Print as Batch Report' and 'View Selected Report'. A note states: 'If you have used a multi-property facility, you can also print the individual reports for each property by clicking on the Print icon within the grid of the property.'

At the bottom, there is a section for 'Events Due In 30 Days' with a table header: 'Property Name | Room Name | Tenant Name | LHA Authority | Rent Due | Amount'.

6. Property Manager – Tenant Details

There is a new feature in Property Manager which displays a summary of who is in the current property:



7. Letting Agent Fees

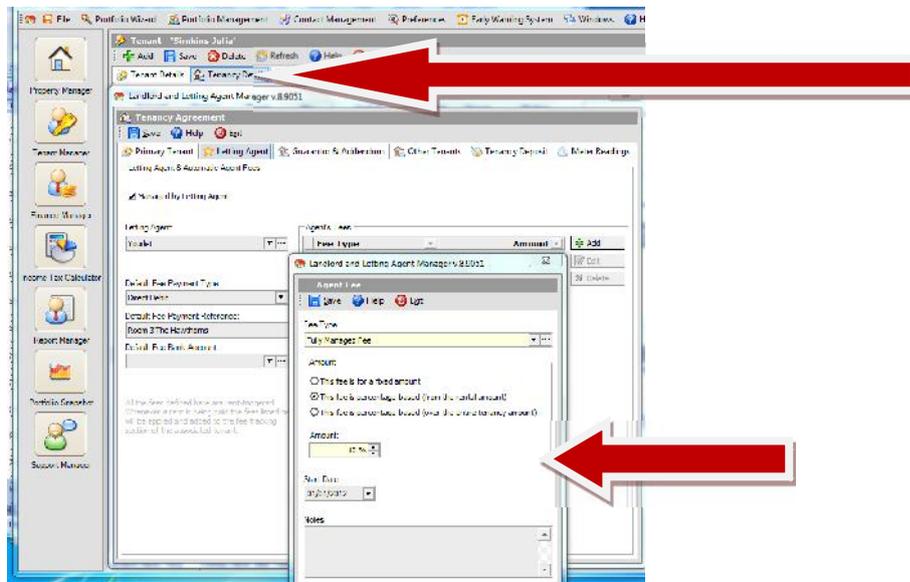
It is quite common for users to not only self-manage their properties but in many cases to have part or their entire portfolio managed to be managed by a letting agent.

Where properties are managed by a letting agent, we have developed a new solution for tracking commissions that are paid to letting agents.

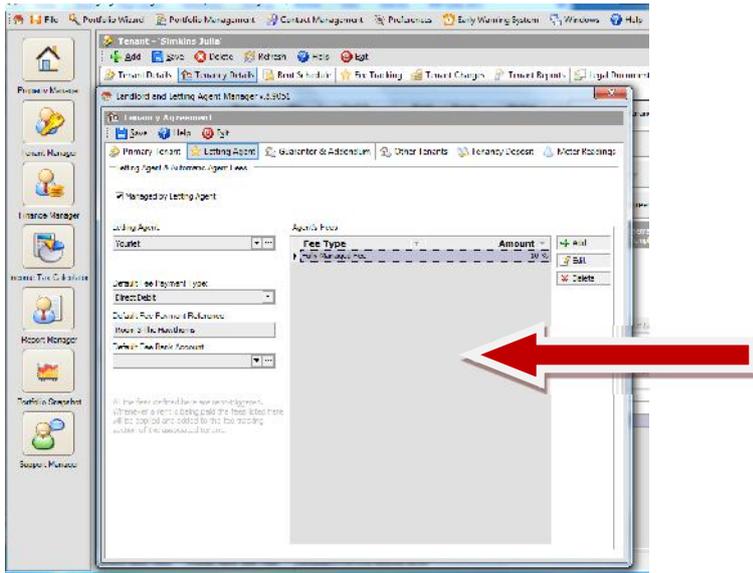
7.1. Creating Letting Agency Fees

The commissions must be set- during the creation of the tenancy agreement. If you have already inputted the property information then create the tenancy in the usual fashion.

Then click on Letting Agent and add the following information: Letting Agent, Default Fee Payment Type, Default Fee Payment Reference, etc and click on Save.



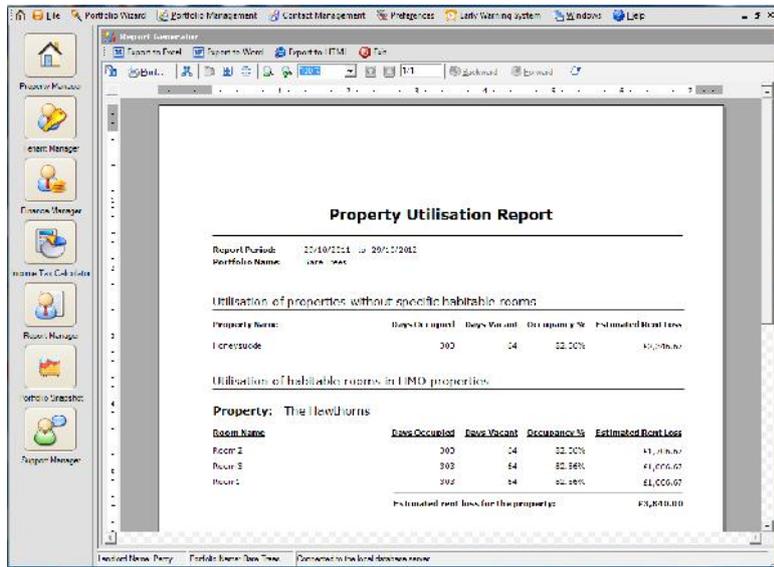
Then click on the “Add” button and the Agent Fee window opens allowing you to enter your information. Once you have clicked “Save” the following screen will display showing that the Agent’s Fees have been added successfully:



then click on “Save” and “Exit”.

8. Property Utilisation Report

This is a useful report which shows how many days a property/room has been occupied/vacant and also shows the estimated rent loss for portfolio over the period you have selected. The report can be found in the Report Manager function.

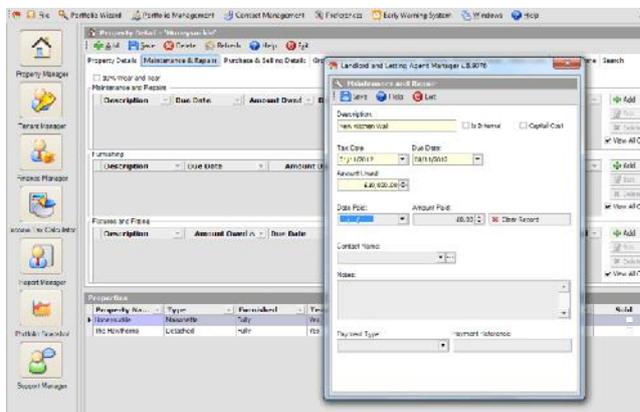


9. Better Expenses Management solution for Tracking Expenses

- The ability to enter due date and date paid for expenses
- New section called 'Expense Warnings' in 'Preferences', where you can specify after how many days past the due date an expense that has not been paid is classed as overdue
- In portfolio snapshot we have a section now called 'Overdue Expenses'
- In the EW system, we have a new tab called 'Expenses' that shows both overdue and expenses that are due

9.1. New 'Due Date' and 'Date Paid' expense fields

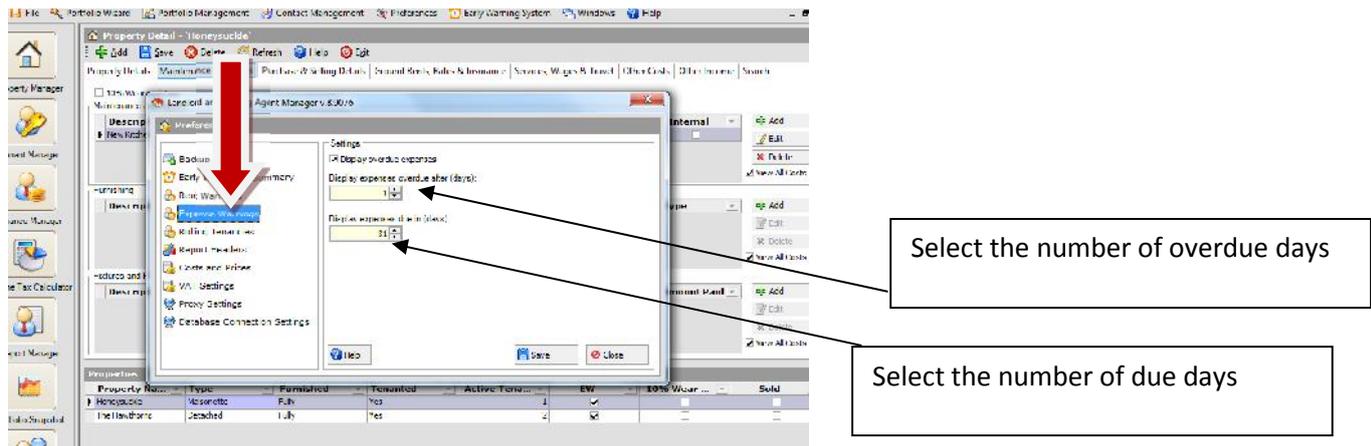
Under all the expense tracking screens there is now an ability to enter a "Due Date" and "Tax Date". For example to create an expense Property Manager → Maintenance & Repairs → Add → Description → Tax Date → Due Date → Amount Owed → Save.



All existing expenses when version 9 is upgraded will have the 'Due Date' and 'Date Paid' set to the 'Tax Date', which means that no difference will be seen on the reports.

9.2. New 'Expense Warnings' Section

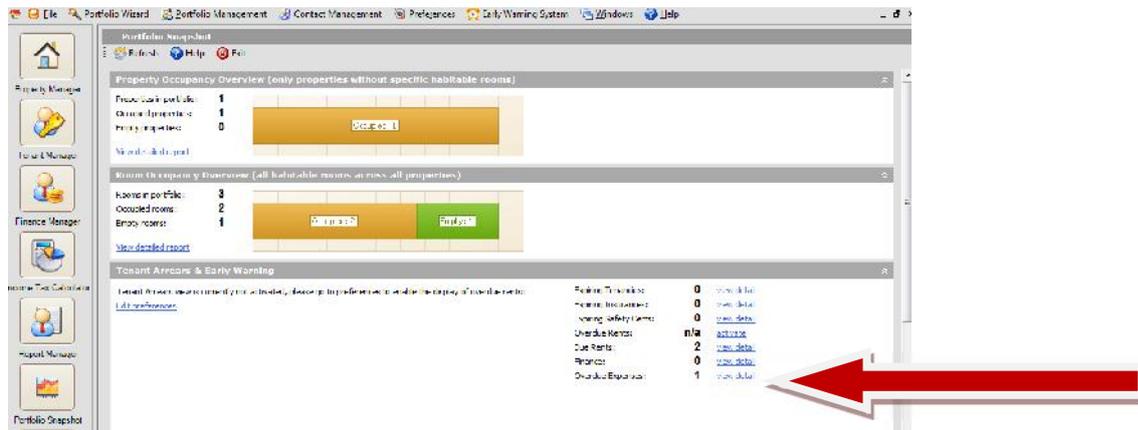
In Preferences, we have a new section called 'Expense Warnings', where you can specify after how many days past the due date an expense that has not been paid is classed as overdue:



Preferences → Preferences → Expense Warnings → Display expenses overdue after (days) → Display expenses due in (days) → Save. An information box will show with the message “Configuration successfully saved”.

9.3. New section ‘Overdue Expenses’ in portfolio snapshot

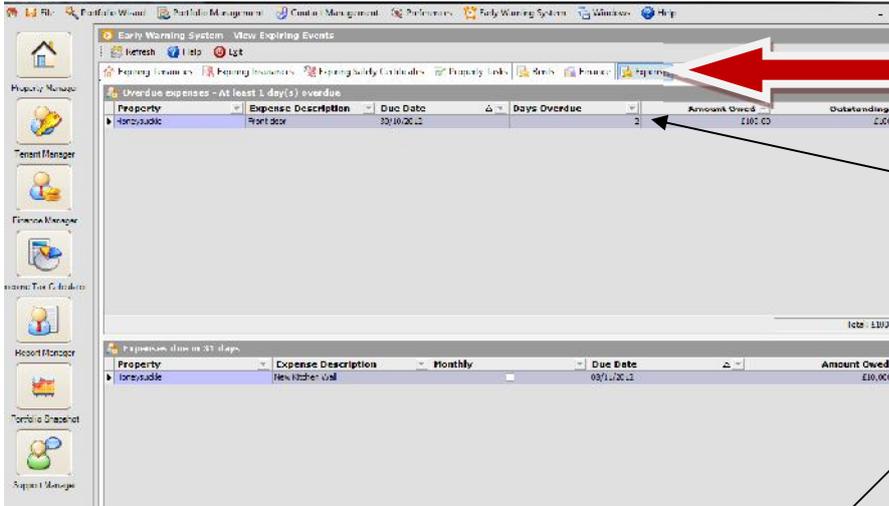
In portfolio snapshot we have a section now called ‘Overdue Expenses’, showing how many expenses are overdue and clicking on this takes you to the EW system.



You can click on the link ‘view detail’ and you will be taken to the Early Warning System where there is a new tab ‘Expenses’.

9.4. New tab ‘Expenses’ in the Early Warning system

In the EW system, we have a new tab called ‘Expenses’ that shows both overdue and expenses that are due.



Double click on here and it takes you to the entry screen

