

Icon Map:

The following icons are used in this template. They are available in the Google Cloud Folder on this Trello Card: <https://trello.com/c/z2j1yyVR>

While icons may look different in this template, the ones in the Google Drive folder are always the most up-to-date. Almost all icons have a complementing line version. The name is the same with the addition of an “-l” added to the end. If an icon is missing, please let me know—chances are it is in the process of being created!

- 1) Edit: [system-edit](#)
- 2) Delete: [system-trashcan](#)
- 3) View: [system-view](#)
- 4) Move: [system-move](#)
- 5) Tenant [users-tenant](#)
- 6) Emergency Information: [system-emergency-information](#)
- 7) Emergency Contact [system-emergency-contact](#)
- 8) Allergies: [system-allergies](#)
- 9) Notifications [system-notifications](#)
- 10) Notes and Files [system-notes-and-files](#)
- 11) Public Files [system-files](#)
- 12) Public Notes [system-notes-red](#)
- 13) Staff Files [system-files-staff](#)
- 14) Staff Notes [system-notes-staff](#)
- 15) Property Manager Files [system-files-property-manager](#)
- 16) Property Manager Notes [system-notes-property-manager](#)
- 17) Owner Files [system-files-private](#)
- 18) Owner Notes [system-notes-private](#)
- 19) Interactions: [system-interactions](#)
- 20) Keys: [assets-keys](#)
- 21) Loanable Items: [assets-loanable-items](#)
- 22) Verified Seal: [system-verified](#)
- 23) Camera: [system-camera](#)
- 24) Vehicles: [assets-vehicles](#)
- 25) Kids: [tenant-kids](#)
- 26) Pets: [tenant-pets](#)
- 27) Others Living with You: [tenant-others-living](#)
- 28) Employment: [tenant-employer](#)
- 29) References: [tenant-references](#)
- 30) Move-Out Address: [tenant-moving-address](#)

PLEASE NOTE: ANY INFORMATION THAT IS UPDATED/DELETED FOR THE TENANT NEEDS TO BE SAVED IN A HISTORY/LOG. THIS IS FOR A FUTURE FEATURE!

- 31) Approve: [system-approve](#)
- 32) Download: [system-download](#)
- 33) Shots: [tenant-pet-shots](#)
- 34) Reject: [system-reject](#)
- 35) No Picture: [system-no-picture](#)
- 36) Tooltip: [system-tooltip](#) (coming soon)

NOTE: Prospects, Tenants, and Renters are the same User account.

Renters are the general name of the user account for the system.

Prospects, are those that contact an Owner about a property, but have not rented it.

Tenants are those that have signed a lease for a property. Renters will only have access to certain fields/parts of this.



Add Tenant

Once Tenant accepts portal invite Owner can't deactivate tenant portal.

NEW TAB

Enable Portal:

☐

Send Notifications:

☐

Prefix: First Name: Middle Name: Last Name: Suffix:

^Prefix and Suffix are editable lists by Super Admin. Fields will be larger, but for space I put them small so they are all on one line.

Address Line 1:

Address Line 2:

City:

State:

Zip Code:

Number 1:

Type

OFFICE

Number 2:

Type

OFFICE

Number 3:

Type

OFFICE

E-mail:

Date of Birth:

DLN/ID:

DL/ID Picture:

Upload ID

DLN/ID Issue State

DLN/ID Issue Notes:

HTML EDITOR

Gender*:

Ethnicity*:

Editable list by Super Admin

^Male, Female, Transgender, Other, Prefer Not to Say

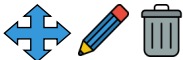
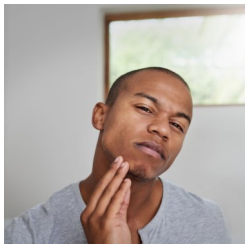
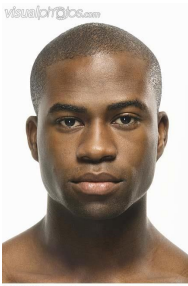
Smoker:

☐

If yes, html box will appear for "smoking notes"

Pictures:

Upload Pictures



(Multiple Picture Upload - first one is "Cover" picture and "My Account" Picture) . If "My Account" Picture is changed, then it is updated here as the Cover Picture. OWNER/PROPERTY MANAGERS are able to see pictures added by Tenant and can also upload to them.



Emergency Information:

NEW TAB



Emergency Contacts:

They should be able to add as many Emergency Contacts as they want.

First Name:

Last Name:

Relationship:

▼

Parent, Partner, Sibling, Child, Friend, Other

Address Line 1:

Address Line 2:

City:

State:

▼

Zip Code:

Number 1:

Type

OFFICE

▼

Number 2:

Type

OFFICE

▼

Number 3:

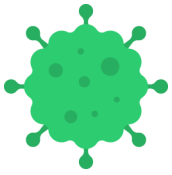
Type

OFFICE

▼

Save

Last Name:	First Name:	Relationship:	Number 1:	Options:
Robertson	Samuel	Colleague	(785) 584-5215	



Known Allergies:

HTML EDITOR



Other Emergency
Info:

HTML EDITOR



Notifications:

This would be an area to add notifications sent just to this specific Tenant. Past Tenant notifications would also appear here. With the ability to edit/delete. Notifications would be Time/Date Stamped and appear under their notifications icon and a pop-up (if selected).

NEW TAB

Add Notification

Title:

Notification:

HTML EDITOR

Pop-up Notification:



Post Later

Post Now

"Post Later" would allow them to schedule the notification to post at a later date/time. "Post Now" would post it instantly. If "Pop-up Notice" is selected, then the notification would show up as a pop-up the next time they log into their system (as well as in the notifications list). Notifications are automatically e-mailed to recipients.



Notes & Files:

Upload Files

NEW TAB



Public Files:



Tenant Documents



Public Notes:

HTML EDITOR



Staff Files:

Upload Files



Staff Documents



Staff Notes:

HTML EDITOR



Property Manager Files:

Upload Files



Manager Documents



Property Manager Notes:

HTML EDITOR



Owner Files:

Upload Files



Owner Documents



Owner Notes:

HTML EDITOR



Interactions:

NEW TAB

This is only seen by OWNER/PROPERTY MANAGER. These would also be displayed in the "Interactions" portion of their application (if they are a prospect). A Table of the interactions would appear below it. "Interactions" tool will also be in other modules.

Date*:



Time*:



Type*:

CALL



Call, Tour, Meeting, Encounter, E-mail, Text, Other (with text box to write in description) ^

HTML EDITOR

Interaction Notes:

Only Owner/Property Managers can see and edit the Interaction Notes.

Interaction Files:

Upload Files

Add Interaction

📅 ↓ Date:	📅 ↓ Time:	📅 ↓ Type:	📅 ↓ Notes:	Options:
08/24/2022	04:30PM	Tour	Shown up on time, seemed interested.	👁️ ✎️ 🗑️
8/25/2022	02:13PM	Call	Called to thank for tour and to follow up.	👁️ ✎️ 🗑️



Keys:

NEW TAB

Add Key

This is a feature that was created for my first system (with a couple of changes). It would allow Keys to be created by the Owner, Property Manager., and Operations. Tenants and Staff can then be loaned these keys. A list of keys and info would show below the form. This is connected to the Keys under the “Assets & Inventory” Module.

Key:

▼

Date Given:

This would be a drop down of keys added into the system via the Assets Module. When a key is added it would take away from inventory (if used).

Add Verification

I would like a way for the Owner to select “Add Verification” that would pop up a form that would show the Key, Date, Replacement cost and an acknowledgement that they have received the key and agree to the replacement cost. They would then sign it and it would take a pic of them and record the IP Address and Timestamp. (likely would be on a tablet).

Lost or Destroyed:

▼

Date:

Auto-Generate &
Send Replacement
Cost Invoice:

Additional
Fees:

Reason:

Add Files

Only the Lost/Destroyed drop down would be displayed. If a Key is marked Lost or Destroyed, then the “Date” field would appear (for when it was lost or destroyed) . This information would replace the “Date Returned” information on the overview. Owner can also have the system automatically generate an invoice for the replacement cost + any additional fees and the reason/files).

Date Returned:

Add Verification

HTML EDITOR

Notes:

Key Tool Tip would show Key Description, verified seal means verified, View would open up full record for the Key. Table would have sort by column options.

Save

Date Given:	Key:	Replacement Cost:	Date Returned:	Notes:	Options:
10/20/2018	Room Key	\$20			
10/20/2018	Front Door Key	\$20 + lock change	4/15/2019	Returned when moved Out	
10/20/2018	Mailbox Key	\$20	LOST 2/5/2015	Dropped key and lost it	



Loanable Items

NEW TAB

+Add Item

This is a feature that was created for my first system (with a couple of changes). It would allow Items to be created by the Owner and Property Manager. Tenants and Staff can then be loaned these items. A list of items would be shown below the form. This is like the Key one with a few more options.

Item:

Serial Number:

This would be a drop down of items added into the system via the Assets Module. When an item is added it would take away from inventory (if used).

They can select an existing serial number or add a new one (that would be added to system).

Date Given:

Add Given Pictures

Add Verification

Owner would be able to take/upload pics of the item/condition at the time of loan. These pictures would be timestamped.

I would like a way for the Owner to select "Add Verification" that would pop up a form that would show the Item, Date, Replacement cost and an acknowledgement that they have received the key and agree to the replacement cost. They would then sign it and it would take a pic of them and record the IP Address and Timestamp. (likely would be on a tablet)

Lost, Damaged, or Destroyed:

Date:

Auto-Generate & Send Replacement Cost Invoice:



Additional Fees:

Reason:

Add Files

Only the Lost/Destroyed drop down would be displayed. If an item is marked Lost, Damaged, or Destroyed, then the "Date" field would appear (for when it was lost or destroyed). This information would replace the "Date Returned" information on the overview. **If Lost or Destroyed**, Owner can also have the system automatically generate an invoice for the replacement cost + any additional fees and the reason). **If Damaged** then Owner can autogenerate an invoice for a specified amount + reason and any uploaded invoice files.

Date Returned:

Add Return Pictures

Add Verification






















Owner would be able to take/upload pics of the item/condition at the time of return (or showing destroyed damage. These pictures would be timestamped.

HTML EDITOR

Notes:

Save

Item Tool Tip would show Item Description (unless there is room to add that as a column next to it), Verified Seal means verified. Camera icon means pics were uploaded. View would open up full record for the Item. Table would have sort by column options. If possible to have “Damaged” or “Lost” appear in a separate column after “Date Returned” that would be great as it would allow for more sorting options (I just couldn’t fit that on the width of this template).

<div><div></div><div>↓</div></div> Date Loaned:	<div><div></div><div>↓</div></div> Item:	<div><div></div><div>↓</div></div> Serial Number:	<div><div></div><div>↓</div></div> Replacement Cost:	<div><div></div><div>↓</div></div> Date Returned:	<div><div></div><div>↓</div></div> Notes:	Options:
5/15/2020 	 Hue Light 	M245663	\$60			  
2/8/2021  	 Dresser 		\$90	DAMAGED 5/5/2021  	No longer needed, drawer was broken.	  
5/4/2020 	 Hue Hub 	4556233	\$50	6/5/2021		  



Vehicles:

The OWNER Should be able to add as many vehicles for the TENANT as they want.

NEW TAB

Add Vehicle

Status: ACTIVE

Year: [] [v] Make: [] [v] Model: [] [v] Color: []

Year CURRENT+1 to 50 years prior. Would like the make to be auto-populated by an online database. Would like the model to be auto-populated by an online database. Is this something I would have to buy or subscribe to?

VIN: [] License Plate: []

Assign Parking Space: [] Space: [] [v]

^if yes then a drop down would show to select what the space is - From an Owner Editable List in the Property Settings.

Vehicle Pictures: Upload Pictures



(Multiple Picture Upload - first one is "Cover" picture)

Vehicle Files: Upload Files

Vehicle Documents [] [v]

Vehicle Notes:

HTML EDITOR

	Year:	Make:	Model:	Color:	License Plate:	Parking Space:	Status:	Options:
	2015	Chevy	Cruze	Blue	LF29482	105	ACTIVE	



Children:

This area would be for adding children the Tenant has staying with them. Children should be able to be given an "ACTIVE/INACTIVE" status and be able to be deleted. They could add as many children as they want by clicking an "Add Child" button. When they click it, the following fields would be available:

Add Child

Status:

ACTIVE



First Name:

Middle Name:

Last Name:

Gender:

Male



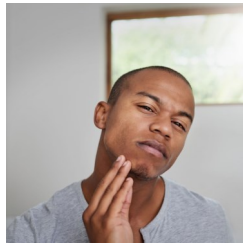
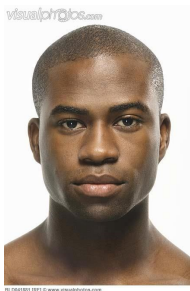
Date of Birth:



age of child would automatically calculate and display next to date in the "View" mode. Gender: Male, Female, Prefer not to say

Child Pictures:

Upload Pictures



(Multiple Picture Upload - first one is "Cover" picture)



Child Public Files:

Upload Files



Child Documents



Child Public Notes:

HTML EDITOR

Child Private Files:

Upload Files



Child Documents



Child Private Notes:

HTML EDITOR

NOT SHOWN: A table of all added children would appear under that would show sortable columns: PICTURE | FIRST_NAME | LAST_NAME | DATE OF BIRTH | AGE (with the birthday counter) | GENDER | STATUS and options to: VIEW | EDIT



Pets:

This area is for the Owner to Add pets the Tenant has. Pets should be able to be given an "ACTIVE/INACTIVE/"REQUEST PENDING"" status and should be able to be deleted. They can add as many pets as they want by clicking an "Add Pet" button. Tenants can "Request a Pet" using this, but must be approved by Owner/Property Manager. Tenants can update certain fields for added pets.

NEW TAB**Add Pet**Status: **ACTIVE** ▼

Pet Name*:

Type*:

Dog ▼

Gender:

Male ▼

^Editable list by Owner

Male Female

Breed*:

Color*:

Weight:

Date of Birth:



age of pet would automatically calculate and display next to date in "VIEW" mode

Support Animal*:

NO ▼

Pet Deposit:

Pet Rent:

Pet Deposit - this autogenerates an invoice and is added to the lease's deposits. Pet Rent-this amount is automatically added to the monthly rent and is shown as a line item in the Rent Invoices: "PET RENT" If a Pet is marked as "Inactive" then the Pet Rent no longer appears in future Rent Invoices.

License:

Location of License:



Shots:

Required Shots:

OWNER can list required shots for this pet. These would show in the shots overview and a notice will be sent for the TENANT to upload proof of the shot. A list of Required Shots would show below the "Add" form with the option for the OWNER to delete the requirement. In OWNER SETTINGS they should be able to create a universal list of required shots.

Type:

ADD

Rabies



FC1

OWNER can edit the name by double clicking the name, or delete the required shot with the delete icon.

As many shots can be added as needed. They would be displayed in a table below this form. For required Shots, A notice should be generated when shot is added or expired and sent to Tenant, Owner, and Property Managers weekly. The Reminder e-mail would stop once a new uploaded proof is submitted. E-mail is sent to OWNER/Property Manager when proof is uploaded so they can review it. Updated proofs are added as new entries—they do not replace the older proof. OWNER can reject the required proof if they review it and find that it is not correct. This would restart required shot reminders (if they apply). If they reject it a box should pop up for a reason, and the rejection emailed to TENANT. Expiration counter would work like the birthday counter, but showing "EXPIRED!" if it is past its expiry date.

Date:

Type:

Expires:

Upload Proof**ADD**

TYPE would be a drop down of the required shots with an "OTHER" selection that would allow the TENANT to type in a non-required Shot Type.

↓ Date:	↓ Type:	↓ Required:	↓ Expires:	↓ Proof:	Option:
8/17/2020	Rabies	REQUIRED	8/17/2021 EXPIRED!		
4/15/2019	FC1		9/25/2023 365 days		

Pet Pictures:

Upload Pictures



(Multiple Picture Upload - first one is "Cover" picture)



Pet Public Files:

Upload Files



Pet Documents



Pet Public Notes:

HTML EDITOR

Pet Private Files:

Upload Files



Pet Documents



Pet Private Notes:

HTML EDITOR

	Name:	Gender:	Type:	Breed:	Date of Birth:	Age:	Expired Req Shots:	Status:	Options:
	Max	Male	Dog	Golden Retriever	10/15/2016	6 30 days!	1	ACTIVE	
	Fluffy	Female	Cat	Mix	8/10/2020	2 335 days	0	REQUEST PENDING	

If Status is "Request Pending" OWNER/PROPERTY MANAGER can "REJECT" or "APPROVE" Request. This will send a notification to the TENANT with the decision and any additional deposit/rent (E-mail Template)



Others Living

NEW TAB

This area is for the Owner to Add other people (not kids) living with the Tenant. They can add as many people as they want by clicking an "Add Person" button. Tenants can "Request a Live in Person" using this, but must be approved by Owner/Property Manager. Tenants can update certain fields for added people. These people are NOT considered Co-Tenants.

Add Person

Status: ACTIVE

First Name:

Middle Name:

Last Name:

Date of Birth:

Gender*:

age of person would automatically calculate and display next to date

Male, Female, Other, Prefer Not to Say

Relationship*:

Spouse | Partner | Friend | Sibling | Parent | Other Relative | Other
(with text box to type in description)]

Additional Deposit:

Additional Rent:

Additional Deposit - this autogenerates an invoice and is added to the lease's deposits. Additional Rent-this amount is automatically added to the monthly rent and is shown as a line item in the Rent Invoices: "LAST_NAME, FIRST_NAME RENT" If a Person is marked as "Inactive" then the Additional Rent no longer appears in future Rent Invoices.

HTML EDITOR

Reason For
Person Wanting to
Move-in:

Pictures:

Upload Pictures

(Multiple Picture Upload - first one is
"Cover" picture)

Files:

Upload Files



Documents



Notes:

HTML EDITOR

Private Files:

Upload Files



Documents



Private Notes:

HTML EDITOR

NOT SHOWN: A table of all added people would appear under that would show sortable columns: PICTURE | FIRST_NAME | LAST_NAME | DATE OF BIRTH | AGE (with the birthday counter) | GENDER | RELATIONSHIP | DEPOSIT | EXTRA RENT | STATUS and options to: VIEW | EDIT Like Pets, "APPROVE" "REJECT" options for those that status is "REQUEST PENDING" and a notification to TENANT is sent on decision.



Employment:

NEW TAB

Tenant should be able to list as many past employers as they want. Once added, they would appear under the form. They should be able to edit/delete them. The Employers would be listed from “End Year” with the most recent first. Those listed as “Present” would be listed first.

Company Name*:

Title/Position*:

Annual Salary*:

Start Year*:



End Year*:



^Drop Downs of current year to 80 years prior. “End Year” would have option of PRESENT.

Address Line 1*:

Address Line 2:

City*:

State*:



Zip Code*:

Website:

Supervisor*:

Number*:

Type*:

OFFICE



Reason For
Leaving/other
Comments:

HTML EDITOR

Employment Notes

HTML EDITOR

Only Owner/Property Managers can see and edit the Employment Notes.

Add Another

NOT SHOWN: A table of all added employers would appear under that would show sortable columns: COMPANY | TITLE | START YEAR | END YEAR | ANNUAL SALARY and options to: VIEW | EDIT | DELETE



References:

They should be able to add as many
References as they want.

NEW TAB

First Name:

Last Name:

Relationship:

Employer | Colleague | Friend | Relative | Other (with text box to type in description))

Number 1:

Type

OFFICE

Number 2:

Type

OFFICE

Number 3:

Type

OFFICE

HTML EDITOR

Reference Notes:

Only Owner/Property Managers can see and edit the Reference Notes.

Add Another

NOT SHOWN: A table of all added references would appear under that would show sortable columns: LAST NAME | FIRST NAME | RELATIONSHIP | NUMBER 1 | REFERENCE NOTES and options to: VIEW | EDIT | DELETE



Move-Out Address:

This would be an area that has the new address/info for the Tenant when they move out. It should be auto-generated from the form sent out with the "Move Out Checklist", but the OWNER should also be able to manually update it.

NEW TAB

Address Line 1:

Address Line 2:

City:

State:

Zip Code:

Number:

Type

OFFICE

E-mail:

Move-Out Date:

Move-out Reason

Editable list by Super Admin