Start here — owner and manager

Operations help · Reviewed 22 November 2026

What the system does

propertiesmanager.app connects property records, leasing, finance, maintenance, security, visitors and tenant support. These services are included together. Different login departments show different work and permissions; a company does not need to buy or activate each service separately.

This guide describes the current application reviewed on 22 November 2026. Button visibility depends on your role, assigned properties and the record's current stage. Sample amounts are illustrations, not company policy.

Sign in to your company

1. Open your company's address: https://YOUR-COMPANY.propertiesmanager.app. Replace YOUR-COMPANY with the address approved for your company.

2. Choose the relevant department, such as Company administration, Property management, Leasing, Finance, Maintenance or Security. Tenants and vendors use their own portals.

3. Enter your individual username and password. Choosing a department does not grant permission to that department.

4. Check the company name and property context before working. Sign out when finished. To test different users on one computer, use separate browser profiles or sign out before switching.

The public homepage's Log in route can help locate a company portal using its company address.

First-time company setup

1. The company owner registers the company, its address, logo and owner details using a company-domain email. Personal/free email addresses are not accepted.

2. Open the verification email and click Confirm my email on the webpage. Opening the email alone is insufficient.

3. Wait for platform-owner approval. Verification and approval are separate steps. After approval, the branded company subdomain is available with all departments.

4. In Company administration, appoint a company administrator and the required department users. Assign property access deliberately.

5. Add the properties and unit counts/types. Leasing completes individual apartment/villa numbers and tenant records.

6. Finance fills in the legal billing identity, TRN, bank details and invoice terms. Download a sample PDF to review the result.

7. Appoint the security head and property security managers, create gates and assign approved guards. Enable visitor logging for the relevant property.

8. The company administrator sets up Learning, publishes approved material and chooses which tenant information AI may use.

9. Run one clearly labelled test tenancy through leasing, finance and management before onboarding real tenants.

Who does what

Role	Main responsibility
Platform owner	Approves company registrations and operates the software platform
Company owner	Company setup, branding, staff access and oversight; can review chats
Company administrator	Company administration and staff access; controls chatbot permissions and learning material
Property manager	Assigned-property oversight, building actions and workflow approvals
Leasing	Unit and tenant records; lease preparation and leasing clearances
Finance	Payment arrangements, invoices, payments, receipts and finance clearances
Maintenance manager	Request review, internal teams and vendor management
Head of security	Company-wide security staffing, guard approvals and log oversight
Property security manager	Assigned-property gates, guard assignments and guard submissions
Guard	Visitor registration and gate check-in/check-out
Tenant	Own lease, billing, maintenance, visitors, move-out requests and chat
Vendor	Assigned maintenance quotations and work updates

There is no separate landlord role: the company owner/admin represents that function. Operational creation still requires the appropriate departmental role. Owner status does not confer company-administrator control of chatbot settings.

The connected workflows

New tenancy: Leasing prepares and submits → Finance verifies payment arrangements → Management approves → tenancy and invoices are created → tenant, maintenance and security can use the approved tenancy as applicable.

Repair: Tenant requests → Maintenance reviews → vendor or internal team is assigned → quotation approval if needed → work begins → work is resolved.

Move-out: Tenant requests → Leasing and Finance each clear → Management gives final approval → Security sees the approved permit.

Visitor: Guard registers → tenant approval or saved auto-approval preference → guard checks in → guard checks out.

Support: Tenant asks → AI answers using permitted sources → human handoff when needed → authorized staff claim, reply and resolve.

A manager's daily routine

1. Review the portfolio Overview, then select the property you are managing.

2. Check pending lease and move-out approvals. Read the supporting history before approving or returning a record.

3. Review overdue balances with Finance and open repairs with Maintenance.

4. Review visitor logs and permits with security management, rather than operating the gate desk.

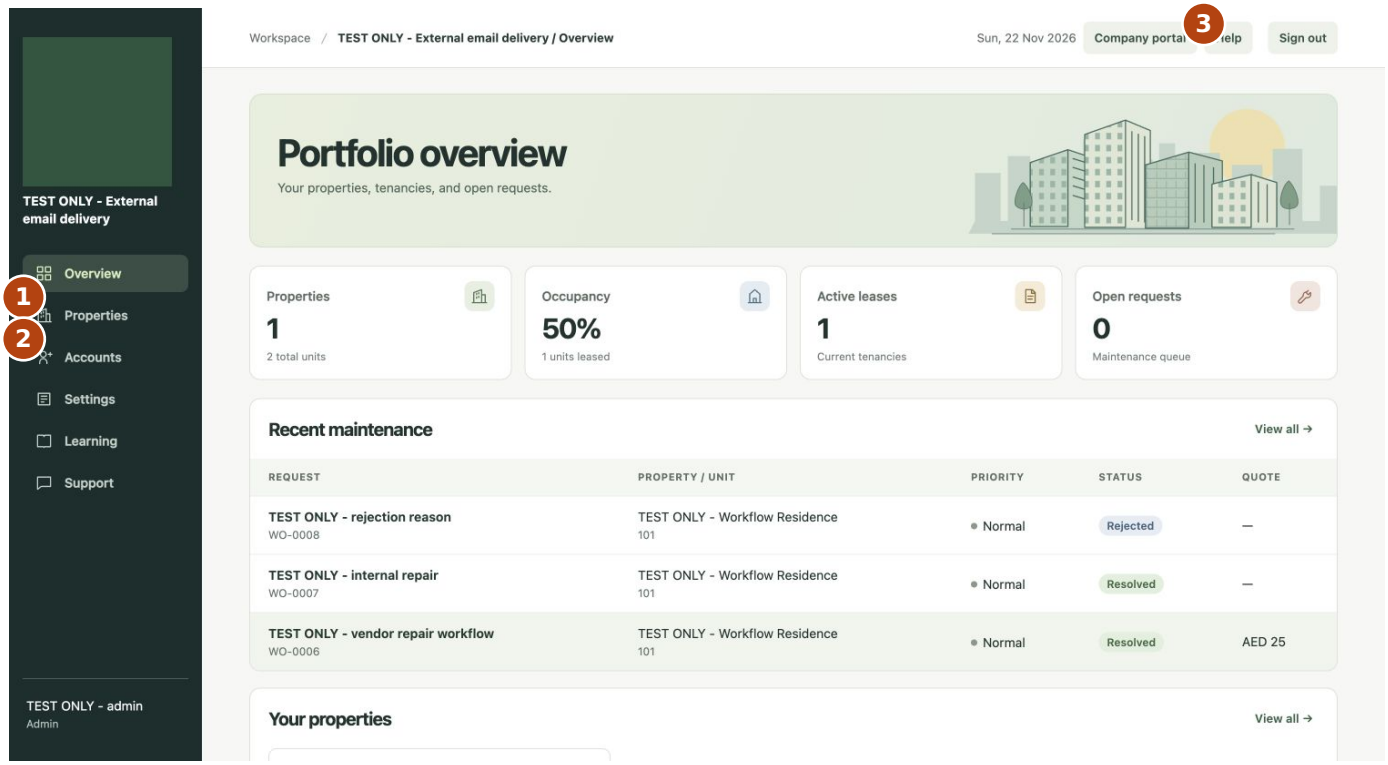
5. Escalate incomplete records to the responsible department with a clear reason.

If something is missing

An empty company has no property or tenant data until staff create it. A visible department login is not an automatic staff account. Ask the company administrator to check your role and property assignment; do not share another person's account to bypass access.

Where to click

Screenshot walkthrough



1. Properties — Open Properties to choose a building.

2. Accounts — Manage staff roles and property access.

3. Help — opens guide in a new tab — Open the guide for the current section.

Example from a synthetic test company. Available actions depend on your role and record status.

Company administration — people and access

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Who uses this guide

Company owners and company administrators. Use the Company administration login, then Accounts and Settings. This is for company staff access; tenant accounts belong in Leasing and vendor accounts in Maintenance → Vendor management.

Add a staff user

1. Open Accounts and choose the add-account action.

2. Enter the person's full name, a unique username and a password meeting the form requirements (12–128 characters).

3. Select the staff role or roles needed for their work. Security roles are separate identities and cannot be combined with other roles in the same account.

4. Select the properties they may access. Use all-properties access only where the person's job requires it; company administrator access is company-wide.

5. Save, then give that person the company portal link and their department. Verify the account sees the expected property.

A manager can be assigned multiple properties. A tenant or vendor account should not be converted into a staff identity; create a separate staff account instead.

Change access

Open the user's access action, revise the allowed role/property selections and save. Access changes sign the affected user out so they must sign in again. The ordinary staff-access editor cannot modify your own access or the company owner account.

For security reporting lines and gate assignments, use the Security workspace. For a forgotten password or an owner-account change not available in the screen, contact platform support; do not expect a self-service reset button that is not present.

Company branding and settings

Upload the company logo from Settings. Company branding identifies the portal; Finance maintains the parent-company billing identity and details used on invoices and receipts. An optional property logo is separate from the company logo.

All services are part of the package. Chatbot data permissions and property visitor access still require deliberate configuration; inclusion does not automatically permit AI to read private documents or allow guards to register visitors everywhere.

Owner versus administrator

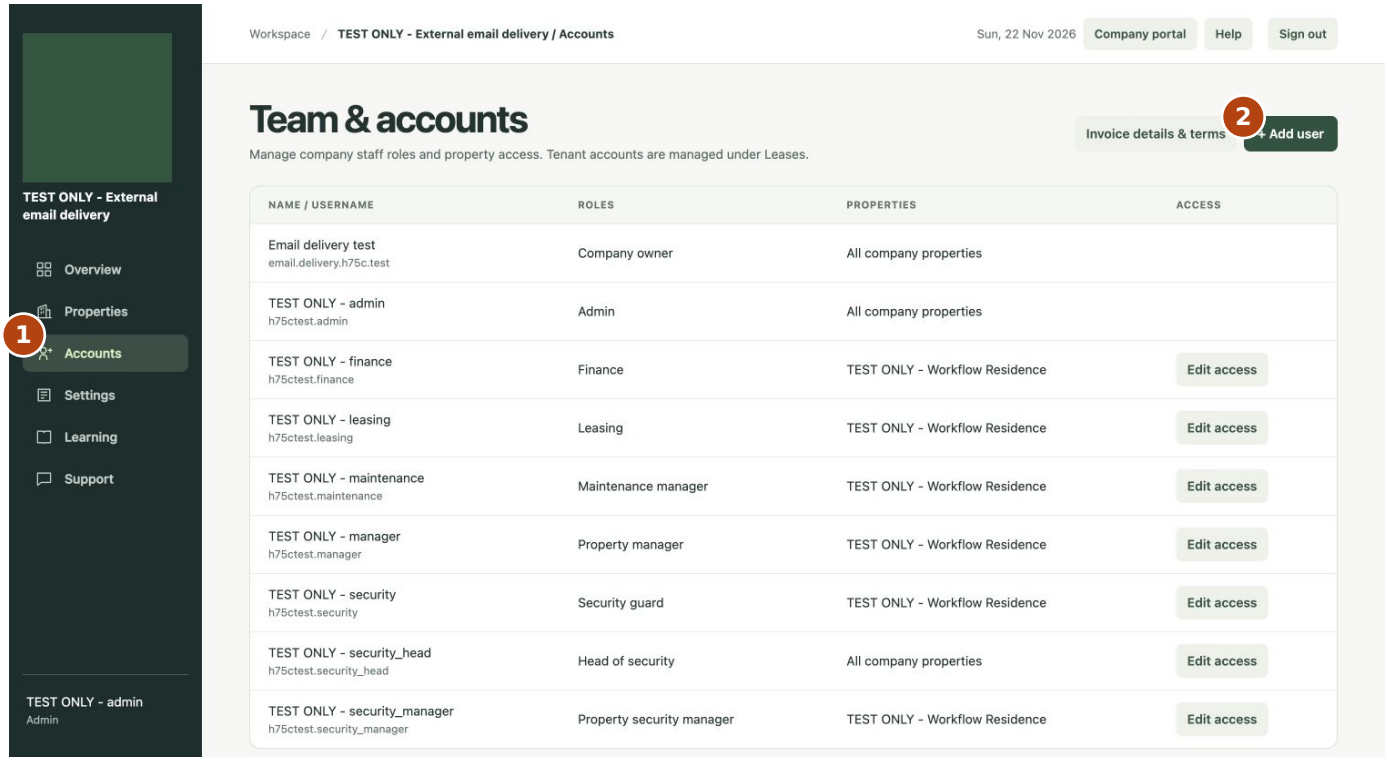
The company administrator manages Learning materials, AI reply enablement and source permissions. The owner can review company conversations but cannot change chatbot permissions or reply as support. Use a separately appointed administrator for those tasks.

Checks and common issues

- Wrong department: choose the login matching the user's assigned role.
- Property missing: verify the account's property assignment and whether the property is archived.
- Guard cannot sign in: check approval status and gate assignment with the head of security.
- Tenant appears absent from Accounts: manage the tenant through Leasing.
- Changed access has not appeared: sign out and sign in again.

Where to click

Screenshot walkthrough



1. Accounts — Open company staff accounts.

2. + Add user — Add a staff user, then assign their role and properties.

Example from a synthetic test company. Available actions depend on your role and record status.

Properties — buildings, units and availability

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Who does what

Company owner/admin adds property records and unit counts/types. Property managers can browse assigned properties, rename or archive buildings, and freeze units. Leasing edits individual unit details and tenant/lease records. A manager must not use building administration to change or delete an apartment or tenant.

Add a property manually

1. Open Properties → Add property.

2. Enter Property name and choose Building, Compound, Building complex, Villa or Other. For Other, enter the custom type.

3. Enter Location and optionally paste a Google Maps location link.

4. Enter Number of units. Add the unit-type breakdown, such as Studio or 1-bedroom. Ensure the type counts equal the total.

5. Optionally upload a property logo, then save.

6. Ask Leasing to complete individual flat/villa numbers and unit types before preparing leases. Unit-count placeholders are not automatically ready-to-rent numbered apartments.

Import new properties from CSV

1. Within Add property, expand Import from CSV.

2. Download the sample and retain the column headings.

3. Use one row per unit type. Repeat the same property details for each type in that property.

4. Check that unit_count totals equal number_of_units for each property. Save as CSV and upload it (up to 1 MB).

5. Review the imported properties. If any row is invalid, correct the file and retry; the import is rejected as a whole.

The columns are property_name, property_type, location, google_maps_url, number_of_units, unit_type and unit_count. For example, a 10-unit building can have a Studio row with 4 and a 1-bedroom row with 6. CSV import creates new properties; it is not an update tool for existing ones and does not import tenant leases. Upload logos separately through Edit property where available.

Browse a property

Select a property from the directory or Current property dropdown. Property-specific screens follow that selection. Overview provides a portfolio summary; the selected property's summary shows units, occupancy and pending approvals. Expand details to inspect unit number, type, tenant, nationality and contract dates according to your access.

The small map uses the saved Google Maps link where supported, or an area preview from the Location text. Use Open in Google Maps to inspect the saved location. An area preview is not proof of an exact building pin.

Freeze or make a unit available

1. Open the property/unit list and choose Freeze for the relevant unit.

2. Read the confirmation and save.

3. Tell Leasing why it should not be rented.

4. When ready, choose Make unit available.

Freezing blocks new leasing of that unit. It does not cancel a current lease, remove the tenant or mean the unit is physically vacant. Occupancy follows current lease dates; future leases and frozen availability should be checked separately.

Rename, archive and restore

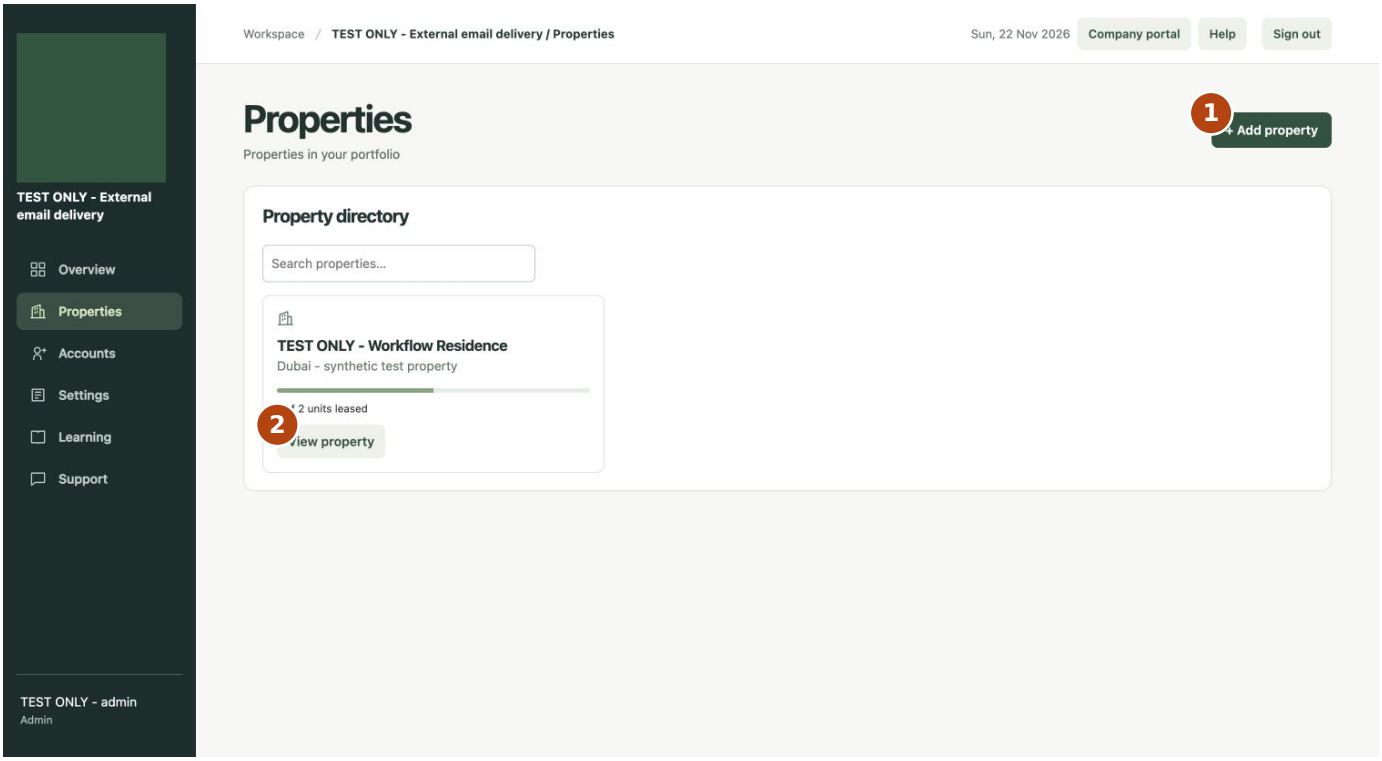
Use Rename building to change its name. Delete / archive building is an archive action that preserves records; review its confirmation. Archived buildings are unavailable for new leasing. Use Restore building when it should return to service. Do not interpret archive as deleting leases or financial history.

Daily checks

Review vacant versus occupied units, upcoming contract end dates and frozen units. If an apartment number is missing or incorrect, send it to Leasing rather than changing tenant data from the manager workspace.

Where to click

Screenshot walkthrough



1. + Add property — Create a property; the CSV import option is inside this form.

2. View property — Browse the summary, map and unit availability.

Example from a synthetic test company. Available actions depend on your role and record status.

Leasing — tenant accounts, contracts and approval

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Before you start

Sign in through Leasing with leasing privileges. The property must exist and be assigned to you. Confirm the correct numbered unit is available and not frozen or archived. Have the agreed tenant details, dates, rent, charge schedule and prepared contract attachment ready.

Prepare the tenant and unit

1. In Leasing, create the tenant account if it does not already exist and associate it with the correct property.

2. Complete the apartment/villa number and unit type in the leasing unit controls.

3. Check the tenant account carefully: it links the lease to that tenant's billing, repairs, visitor approvals and move-out requests.

Prepare a lease

1. Open Lease approvals and payment plans → Prepare lease.

2. Select the property and tenant account. Enter flat/villa number, nationality, start date, end date and agreed rent in AED.

3. Attach the prepared contract as PDF, PNG or JPEG, at most 2 MB. The system stores the attachment; this workflow does not generate or electronically sign a legal contract for you.

4. Generate the rent/deposit lines using Number of rent payments and the editable Deposit percentage, or add the agreed charges manually.

5. For each charge enter Rent, Refundable deposit or Other charge, its description, amount and due date. Describe items such as parking-key or facility-key deposits clearly.

6. Check that rent lines total the agreed rent. Deposits and other charges are additional lines. The form's initial 5% deposit value is editable, not an enforced policy.

7. Save draft, review it, then select Submit to Finance and confirm.

What Finance and Management do next

Finance reviews each agreed charge, completes payment method/reference and bank details, optionally attaches cheque images, and confirms receipt of instruments/arrangements. Finance can split a charge into multiple payments but cannot alter the total agreed for that charge. It submits the cleared schedule to Management.

Management reviews the cleared proposal and selects Approve lease. This creates the operational tenancy and its invoices. A draft or proposal in review is not yet an operational lease. Date-sensitive tenant services also depend on the lease being current.

Lease stages

Stage	Responsible person	Next step
Draft	Leasing	Edit, attach contract and submit
Finance review	Finance	Complete review or return with reason
Returned	Leasing	Correct and resubmit
Management approval	Management	Approve or return with reason
Approved	Operational departments	Use the tenancy and generated invoices

A returned proposal requires Finance clearance again after Leasing resubmits it. If another person changes the proposal while you are reviewing, refresh and review the latest version rather than repeatedly submitting stale data.

After approval

Check the correct unit, dates, tenant and invoices. Give the tenant their portal access and ask them to confirm visitor preferences. Keep cheque-receipt confirmation separate from actual invoice payment: Finance must record payments separately.

Use property, status, date and search filters where shown. Export CSV or Excel exports the matching register records. Tenant views are summaries and document previews, not staff export screens.

Move-out duty

Review the tenant's request in the permit approval list. Confirm required agreements/documents are complete and give leasing clearance, or reject with a useful reason. Finance must also clear the request before Management can give final permission. See the Move-out permits guide.

Troubleshooting

• Cannot submit: attach a supported contract and check dates and rent totals.

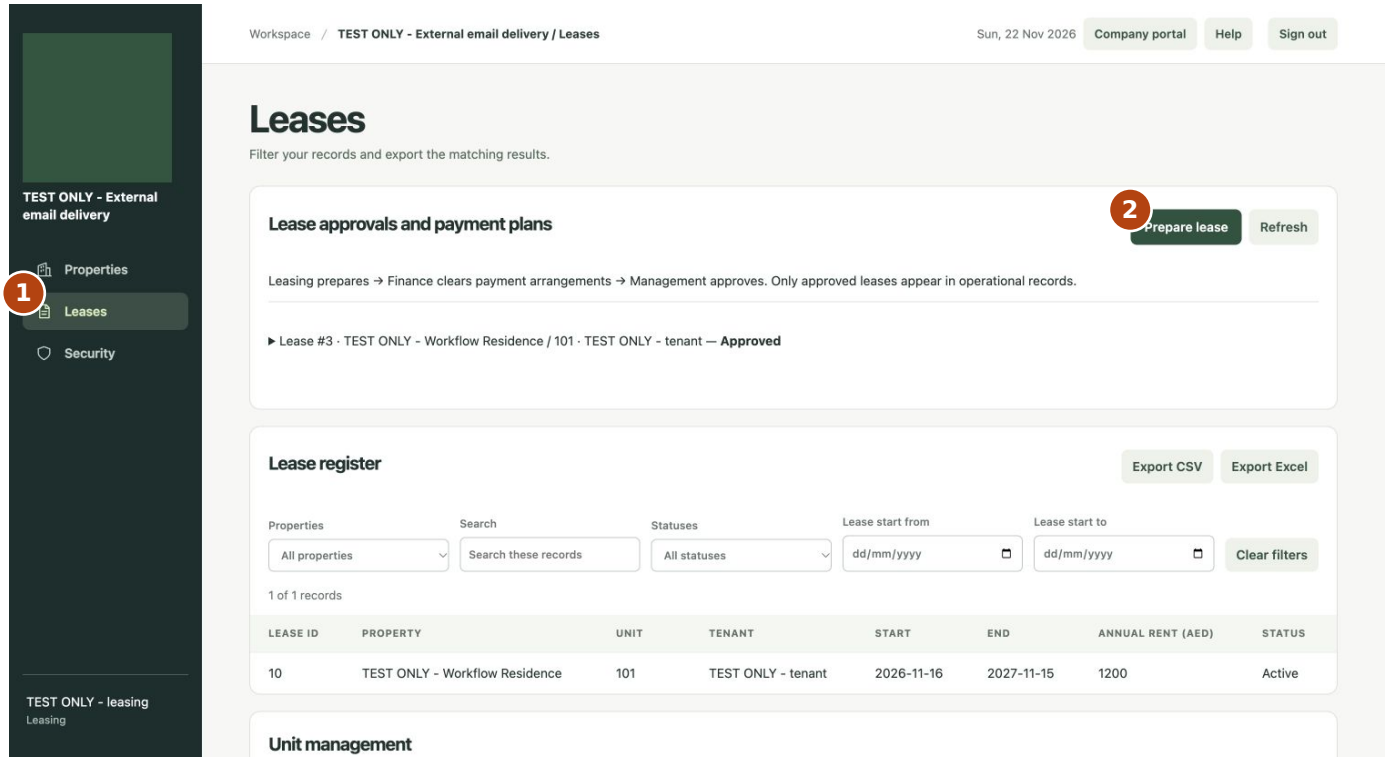
• Unit cannot be leased: check freezing, archiving, the unit record and conflicting tenancy dates.

• Tenant cannot see the lease: verify tenant-account linkage, approval status and date range.

• Approved lease needs correction: do not create a duplicate to hide an error. Escalate to the responsible company administrator/platform support for the appropriate correction path.

Where to click

Screenshot walkthrough

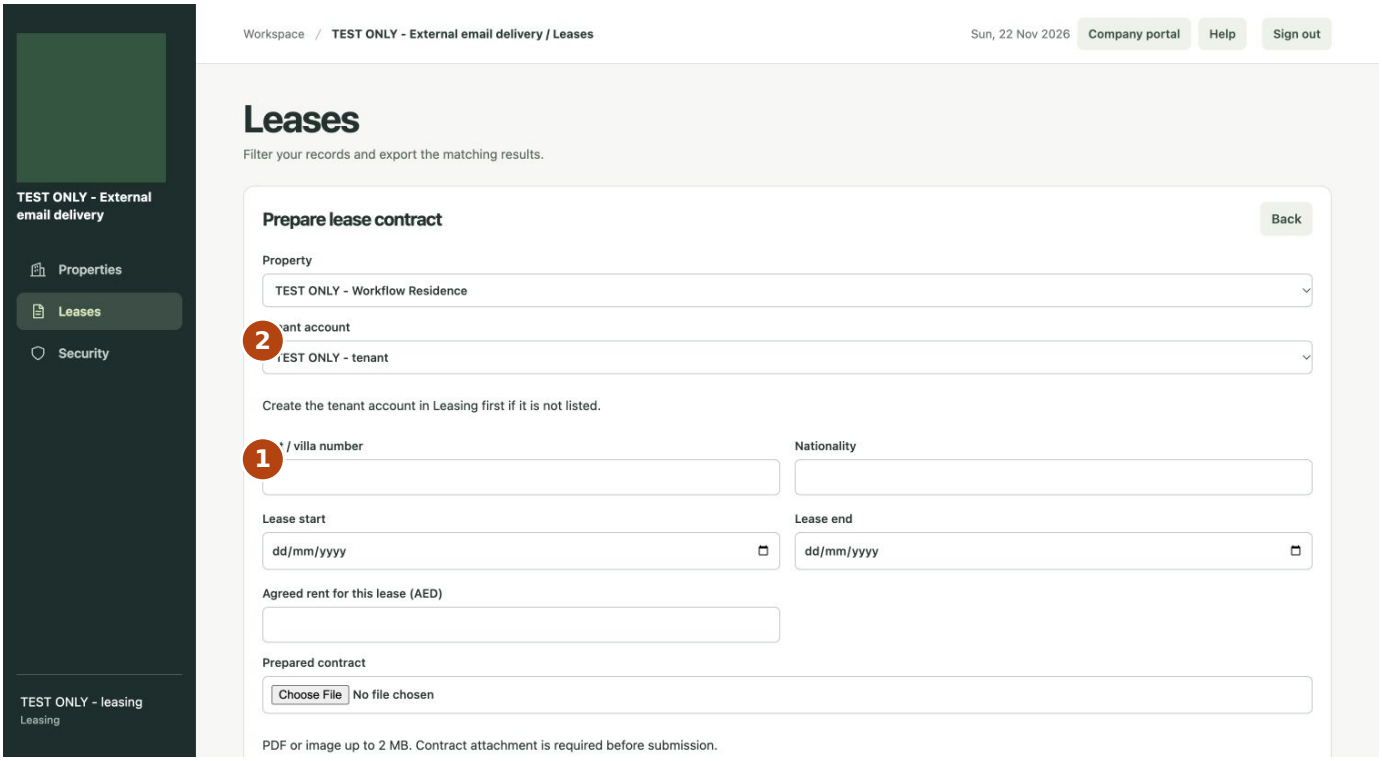


1. Leases — Open the lease workflow and register.

2. Prepare lease — Start a contract and payment plan for Finance to review.

Example from a synthetic test company. Available actions depend on your role and record status.

Screenshot walkthrough



1. Flat / villa number — Enter the exact numbered unit.

2. Tenant account — Select the tenant account created in Leasing.

Example from a synthetic test company. Available actions depend on your role and record status.

Finance — invoices, payments and receipts

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Who uses this guide

Finance staff use the Finance department to maintain payment arrangements and financial records. Company owners/admins and property managers review information and authorized approvals; they do not create invoices or record payments merely by holding those roles. Tenants see only their own billing.

Set the billing identity first

Open the company billing settings in Finance (Company billing identity & terms). Enter the parent company/legal billing name, company address, phone, TRN/tax registration number, terms and conditions, bank name, account name, account number and IBAN. Save, then review a downloaded invoice and receipt. Use the mother company's legal identity rather than automatically using the building name.

The company logo and details appear on PDFs. Bank details appear on tenant invoices. Entering a TRN does not calculate or add VAT; verify the amounts under your company's accounting process.

Review a new lease's payment arrangements

1. Open the lease proposal waiting for Finance review and inspect the contract and agreed charges.

2. Choose Complete Finance review.

3. Enter the amount, due date, payment method and reference for each line. Cheques require a cheque number/reference and bank.

4. Add another payment for a charge if splitting it across cheques. The split total must still equal that charge's agreed amount.

5. Optionally attach a cheque/payment image or PDF, at most 2 MB per attachment.

6. Confirm Received / arrangements verified for the agreed instruments or arrangements, then submit to Management.

7. If the agreement is wrong or incomplete, Return to Leasing with a clear reason rather than changing the agreed total.

Received is not paid. Receiving a cheque or verifying arrangements does not mark an invoice paid. Management approval creates invoices from the schedule; actual payment is recorded separately.

Invoices and payment tracking

1. Review invoices generated after lease approval. Create a separate invoice only for a genuine additional charge not already generated.

2. Open an invoice and check the tenant, property/unit, description, issue/due dates, amount and balance.

3. When payment has actually been confirmed under your process, select Record payment.

4. Enter amount, payment date, method and reference. Partial payments are supported; a payment cannot exceed the outstanding balance.

5. Save and check the updated balance/payment history.

6. Download the invoice PDF and the receipt for that particular payment. The receipt identifies its payment and invoice; a partially paid invoice remains outstanding for the difference.

The application tracks payments; it does not move money, deposit a cheque, check bank clearance or automatically reconcile a bank feed. Staff must verify real-world payment evidence.

Correct mistakes without hiding history

Use Reverse payment for an incorrectly recorded payment and enter a reason. This changes the tracked balance; it is not a bank refund. To void an invoice, reverse its recorded payments first, then use the void action with a reason. Keep the audit trail and explain the correction to the tenant. Do not record a second payment to compensate for an error.

Reporting and move-out clearance

Use property, status, date and search filters where shown. Export CSV or Export Excel downloads matching records. Reset filters if records appear missing.

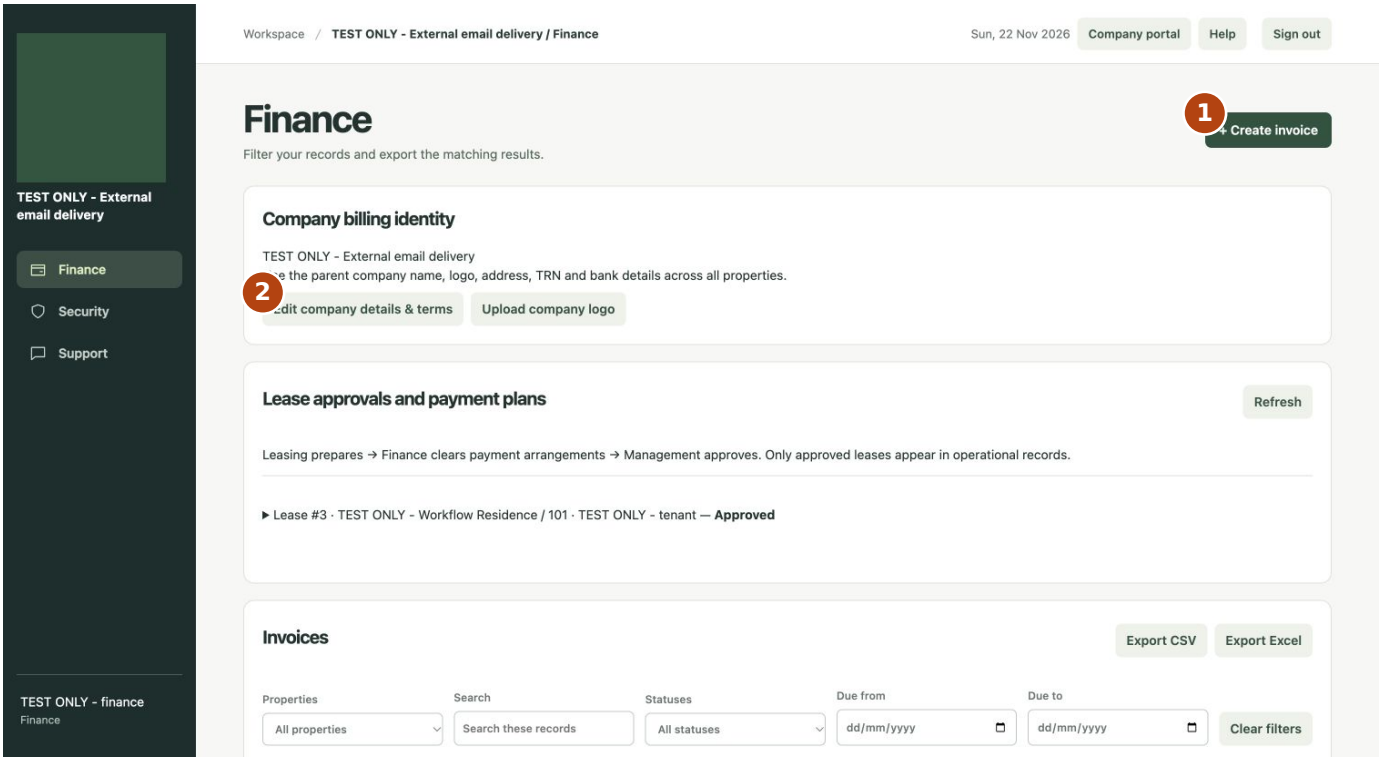
For a move-out request, inspect unpaid amounts, deposits and other obligations under your company's settlement process. Give Finance clearance only when you are satisfied, or reject with a reason. The software does not perform a deposit refund simply because you approve a permit.

Daily checklist

Review due/overdue invoices, reconcile payments to external evidence, check partial balances, provide requested PDFs and clear lease/move-out review queues. Refresh before retrying an uncertain save; verify the record was not already created.

Where to click

Screenshot walkthrough



1. + Create invoice — Create an invoice for the correct tenant and property.

2. Edit company details & terms — Set the legal company name, TRN, bank details and terms.

Example from a synthetic test company. Available actions depend on your role and record status.

Maintenance — requests, internal teams and vendors

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Workspace and roles

Maintenance opens with the latest requests. Internal team and Vendor management are separate sidebar sections. Tenants submit their own repairs; maintenance staff triage and assign them. Property/company managers browse and approve quotations within their access, rather than creating requests.

Review a request

1. Open the request from the list to inspect its property, unit, tenant, description, priority, status and history.

2. Check whether more information is needed and coordinate with the tenant through the available contact/support process.

3. Accept the request for handling, or Reject it with a written reason. A rejection without a reason is not accepted.

4. Assign accepted work to an internal team for that property or a vendor.

5. State whether a quotation is required and whether extra parts are needed. If parts are required, describe them; parts-required work requires a quotation.

Assign internal work

In Internal team, add the team's name, property, contact and members. Select that team when assigning the request. A team must belong to the request's property. The maintenance manager records the team's quotation and work updates; adding a team does not create individual technician logins.

For work requiring no extra cost/quotation, assignment can move it directly to Ready for work. Record Begin, then Resolve with a completion note after the work is done.

Assign vendor work

In Vendor management, add the vendor's full name, username/password, email, phone and trade. Choose General work, Electrical work, Plumbing, AC repair, Painting or another available trade. Other lets you supply a new work type. A licence attachment is optional (PDF/PNG/JPEG, up to 2 MB).

The vendor uses its own portal to view assigned work, submit the quotation, begin approved work and resolve it. Maintenance staff cannot perform the vendor's work updates as if they were that vendor.

Open a vendor to edit details or suspend/reactivate it. Suspension prevents new assignment to that vendor and signs it out; review unfinished work and reassign it as appropriate. It does not automatically complete existing jobs.

Quotation and work stages

Status	Meaning and next action
Requested	Awaiting maintenance review
Accepted	Accepted, ready for assignment
Assigned	Vendor/team assigned; quotation required
Awaiting approval	Quotation submitted for an authorized approver
Ready for work	Quote approved, or assigned without extra cost
In progress	Assigned operator began work
Resolved	Completion note recorded
Rejected	Maintenance rejected the initial request with a reason

Authorized finance/management approvers can approve or decline a quotation. Declining returns the job to Assigned for a revised quotation; it does not mean the repair is complete. This is a quotation approval, not the separate two-department clearance used for move-out permits.

Complete and review

1. Verify approval before beginning chargeable work.

2. Record Begin when work actually starts.

3. Record Resolve with a clear completion note after work is finished.

4. Check that the tenant sees the updated status.

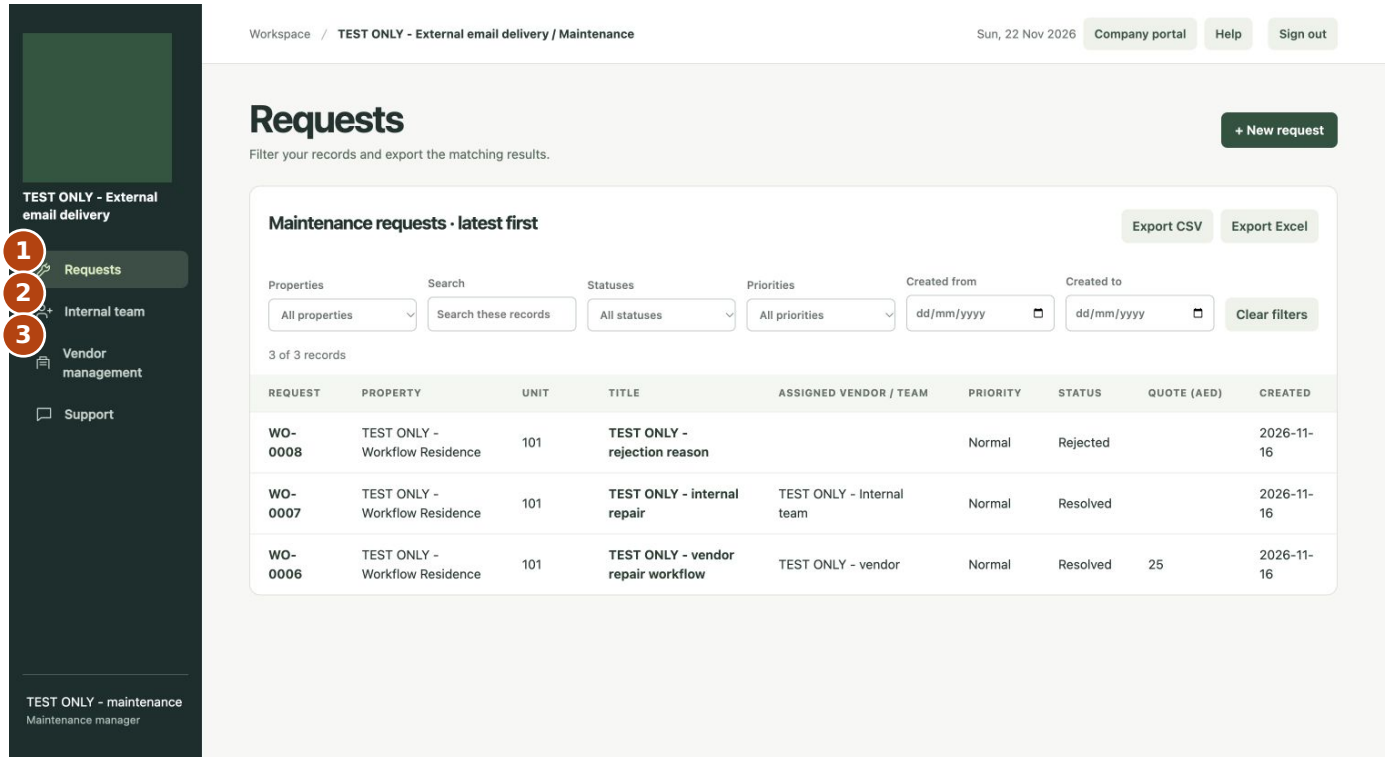
A resolved job does not automatically create a supplier payment or tenant invoice. Coordinate genuine charges with Finance separately.

Daily checks and troubleshooting

Review latest/unassigned requests, quotes waiting for approval and jobs in progress. Use available filters and staff exports. Tenants need a simple request/status view and do not need CSV/Excel exports. If an action is missing, inspect both the role and current status; work cannot skip required approval stages.

Where to click

Screenshot walkthrough



1. Requests — Review the latest maintenance requests.

2. Internal team — Manage the company maintenance teams.

3. Vendor management — Add, edit or suspend external vendors.

Example from a synthetic test company. Available actions depend on your role and record status.

Security management — hierarchy, gates and guards

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Three levels of responsibility

Security role	Operates
Company Head of Security	Existing company properties, security managers, guard approvals and log oversight
Property Security Manager	Assigned property/properties, gates, guard assignments and new guard submissions
Security Guard	Assigned active gates, visitor registration and entry/exit

Use the separate Security login. Security has a separate session from the main application. The head of security is an oversight role: it does not register visitors, perform OCR or operate gates. Property security managers manage their assigned scope; the guards operate the gate desk.

Set up security for a property

1. The owner/admin appoints the Company Head of Security.

2. The head opens Properties, reviews locations, property types, tenant counts and gate counts, and appoints the property security manager/in-charge for an existing property.

3. The property security manager opens their workspace, creates the gates and gives each a recognizable name.

4. Mark gates active and choose whether plate information/photo is required.

5. Enable visitor logging for that property in the property visitor-access settings.

6. Create or assign guards to a property, its security manager and the required gates. Give each person their own account.

Security does not create new buildings in the company portfolio. Ask company administration to add a missing property first.

Approve a newly submitted guard

1. A property security manager submits a guard with a username/password, supervising manager and gate/property assignments.

2. The head of security reviews Pending guards and verifies the proposed assignment.

3. Approve or reject the request. A pending guard cannot sign in as an active guard.

4. After approval, test that the guard sees the assigned active gate and no unrelated properties.

A head of security can also add guards directly with the required property, manager and gate scope. Creating a guard account without a gate is insufficient.

Reassign or disable access

Review both property and gate assignments when moving a guard. A gate must belong to an assigned property. Access changes require the user to sign in again. Reassign a manager's guards before removing that manager's property responsibilities. Deactivate a gate when it should stop accepting arrivals; review who is still inside and organize checkout at an authorized gate.

Gate-specific links select a gate but never bypass sign-in or grant access. Do not share a guard account between shifts; use individual accounts so actions are attributable.

Oversight routine

Review Visitor logs, people still inside, long visits and approved permits for each property. Confirm staffing and gate assignments. Security can see the final move-out permit after leasing/finance/management clearance; it does not replace those departmental decisions.

Troubleshooting

• No properties: check role and explicit property assignment.

• No gate: check that the gate is active and assigned to this guard.

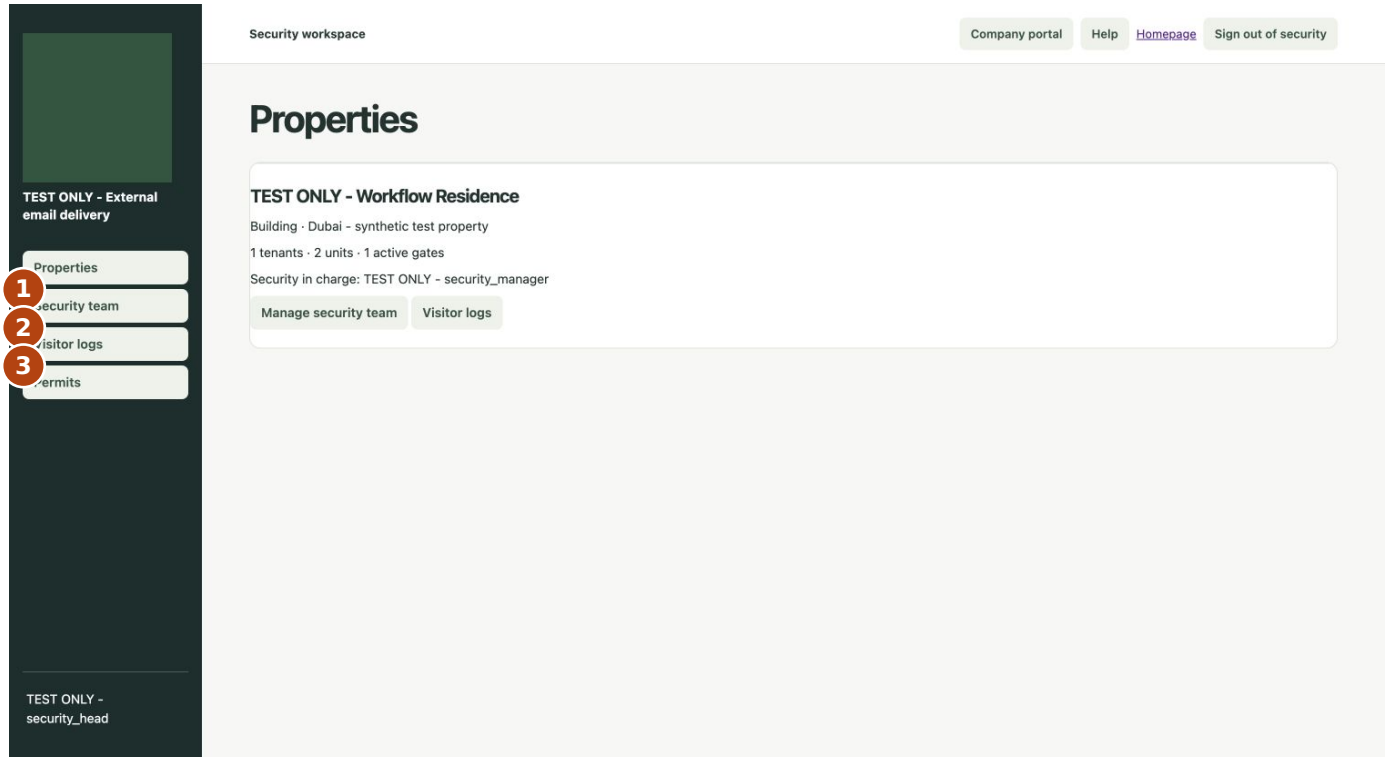
• No tenant/unit: check an approved, current tenant-linked lease and property visitor logging.

• Cannot create a guard: check the supervising security manager and allowed gate/property scope.

• Approval controls are absent: a property security manager submits guards; the head approves them.

Where to click

Screenshot walkthrough



1. Security team — Assign security managers and manage guard approvals.

2. Visitor logs — Review visitor activity across assigned properties.

3. Permits — Review move-out clearance and final permits.

Example from a synthetic test company. Available actions depend on your role and record status.

Visitor log — guard desk and tenant approval

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Before the shift

Sign into Security as your own guard account. Select the assigned gate and confirm it is the physical gate you are operating. On mobile, use the bottom navigation where shown. Confirm the property has visitor logging enabled and the gate is active.

Register an arrival

1. Choose the occupied unit/tenant the visitor intends to see. Only eligible tenant-linked leases are available.

2. Enter the visitor's full name, mobile, purpose and any relevant notes. For Delivery, choose the delivery company as prompted.

3. Capture or upload the ID image and, when needed, a plate image. Gate settings can require plate details. Use the on-screen camera controls or the device file picker; allow camera permission when prompted.

4. Review extracted suggestions for the name, ID reference and plate number. Correct errors before continuing. Text extraction assists entry; it is not identity verification.

5. Confirm photo review when photos are attached. Follow the site's identity-checking procedure separately.

6. Submit the visit once and inspect the resulting status.

PNG/JPEG images are supported; upload/extraction controls enforce image limits, typically 2 MB for the saved image. If capture or extraction fails, use a clearer photo/upload and correct fields manually. Do not invent missing ID details.

What happens after submission

Tenant preference	Result for a new visit
Approve every visit	Pending until tenant approves or declines
Automatically approve deliveries	Delivery visits are approved automatically; other visits need approval
Automatically approve all visits	All new visits are approved automatically

Tenants confirm their preference during onboarding and can change it in Visitors. Until a preference is confirmed, approval is required. Changing the preference does not retrospectively approve a pending visit.

The tenant receives an in-app notification and can approve or decline. The application must be open/visible for its periodic refresh; this is not SMS or an operating-system push alert. Tenant notifications do not expose ID numbers or photographs.

Check in and check out

1. Wait for Approved. Pending or Declined is not permission to enter.

2. Select Check in when entry actually occurs. Approval alone does not record physical entry.

3. Monitor Inside now and the visitor log during the shift.

4. Select Check out when the visitor leaves. An authorized guard at another gate of the same property can record the exit.

5. Review any remaining inside visitors before handing over the shift.

Pending and approved entry passes expire after 30 minutes. An expired pass requires a fresh arrival request; there is no guard override of tenant approval. A checked-in visitor can still be checked out if new visitor logging is later disabled.

Troubleshooting

• Tenant has not replied: keep the visitor pending and use the site's contact procedure; silence is not approval.

• Check in is unavailable: inspect approval, expiry and gate permissions, then refresh.

• Visitor is missing: check gate/property, search and Inside now/history filters.

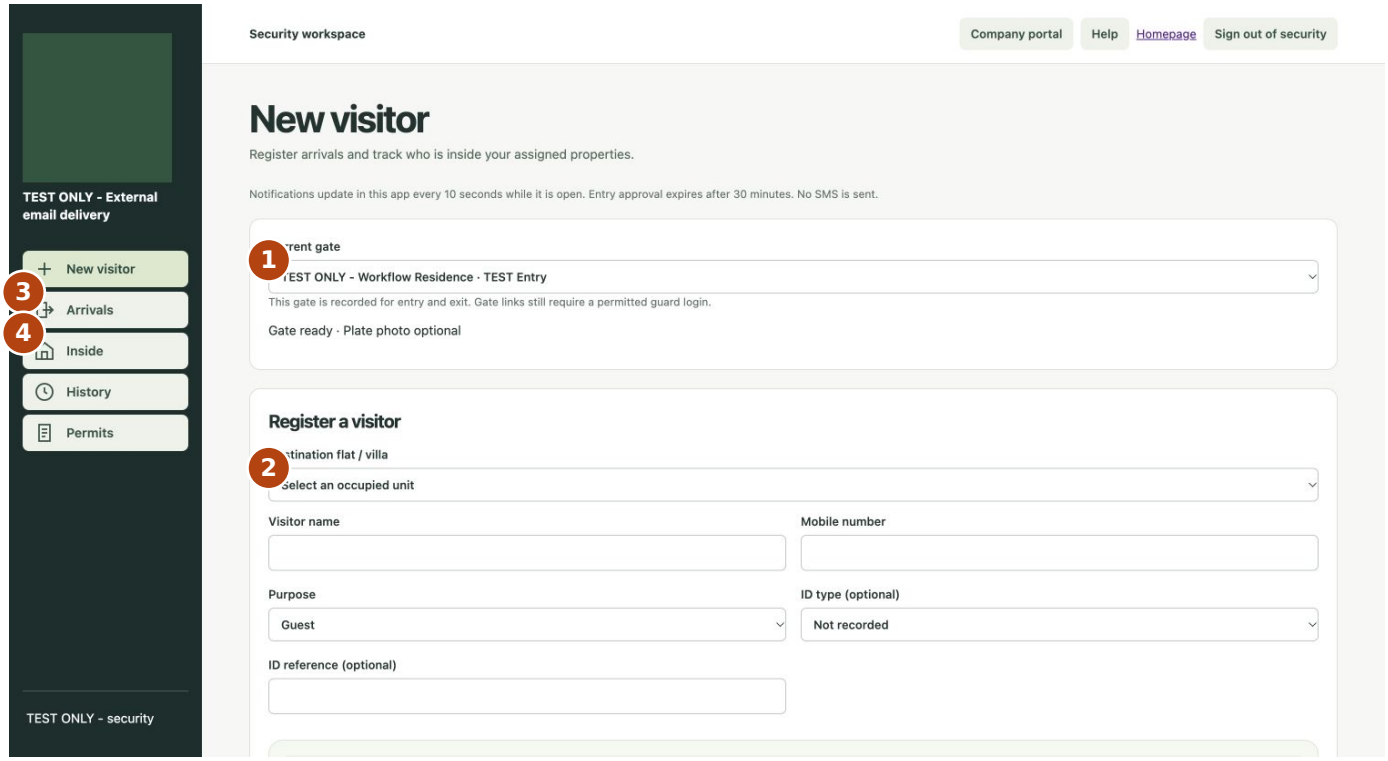
• Camera blocked: review browser camera permission and use Upload if necessary.

• ID text is wrong: correct it and review the photo before submission.

Logs record the gate, operator and action times. Authorized staff may view private ID/plate details; tenants see the arrival information needed for their decision.

Where to click

Screenshot walkthrough



1. Current gate — Confirm the gate you are staffing.
2. Destination flat / villa — Choose the occupied unit receiving the visitor.
3. Arrivals — After submission, review the tenant decision before check-in.
4. Inside — Use Inside to check out visitors when they leave.

Example from a synthetic test company. Available actions depend on your role and record status.

Move-out permits — clearance and final approval

Operations help · Reviewed 22 November 2026

Workflow at a glance

Tenant submits → Leasing clears agreements/documents AND Finance clears financial obligations → Management approves → Security views the final permit.

Leasing and Finance can clear in either order. Both are required before Management's final approval. This workflow currently covers tenant-submitted Move out requests; do not assume a separate move-in permit workflow is implemented.

Tenant: submit the request

1. Open Move permits in the tenant portal.

2. Check the displayed tenancy. If the screen offers more than one eligible tenancy, confirm the intended one; do not select an unrelated unit.

3. Enter Planned move date and useful notes, such as access or moving arrangements.

4. Select Submit move-out request.

5. Track the request and read any rejection reason. Do not treat submission as permission to move.

Only the tenant submits this request. Security and property management do not create it on the tenant's behalf.

Leasing: check agreements

Open the permit list, expand the request, confirm the correct tenant/unit and review agreements and required documents. Approve leasing clearance if complete; otherwise reject and write a clear reason describing what must be corrected.

Finance: check settlement

Review invoices, payments, deposits and other financial obligations using the company's settlement process. Approve Finance clearance when satisfied, or reject with a reason. This is a human financial review, not an automatic assertion that every account balance is zero and not a payment/refund transaction.

Management: final permission

In the property context, open Permits / Move-out approval inbox. Review all requests or filter by status. Read both departmental clearances and notes. Give final approval only when both are approved. The software blocks a premature management approval.

Security: inspect the permit

Use Permits in the Security workspace to confirm the correct tenant, property/unit, planned date and final Approved status. Check that all three clearances are recorded. Pending departmental clearance is not a permit. Follow the property's physical move-out checks separately.

Rejections and follow-up

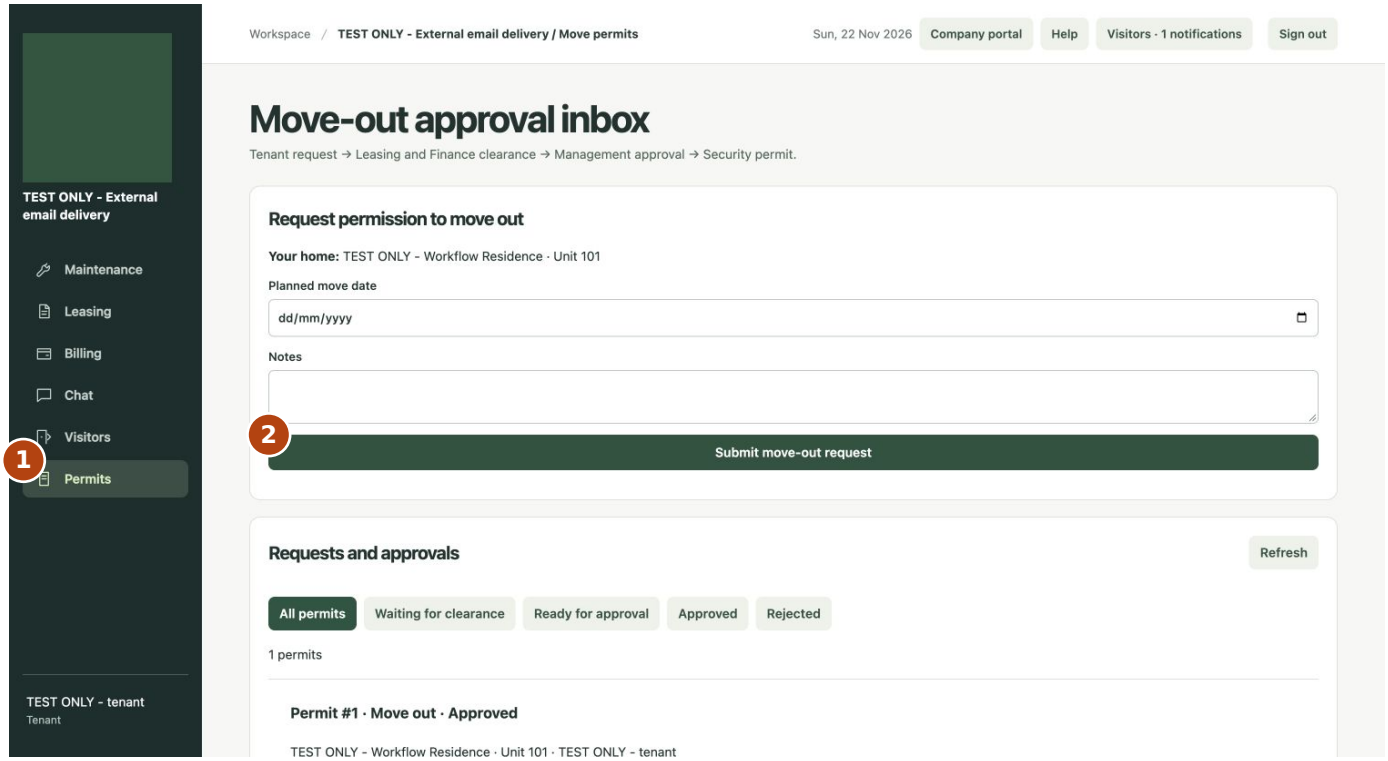
A rejection requires a note. The tenant should correct the underlying issue and submit a new request once resolved. Do not repeatedly submit duplicate pending requests. If a screen says the record changed, refresh and re-read the latest decisions.

What approval does not do

A permit does not automatically terminate the lease, refund deposits, mark the unit vacant, close maintenance work or record a physical exit. Leasing, Finance and Security must finish those operational steps separately. The permit records permission and its approval history.

Where to click

Screenshot walkthrough



1. Permits — Open your move-out requests.

2. Submit move-out request — After entering the move date and notes, submit for Leasing and Finance clearance.

Example from a synthetic test company. Available actions depend on your role and record status.

Learning centre — AI permissions and human support

Operations help · Reviewed 22 November 2026

Responsible role

The company administrator controls Learning. Company owners can review company chats but cannot activate/deactivate AI, change its tenant-data permissions, edit learning material or reply as support. Use the correct administrator account, not the owner account, for setup.

Configure Assistant access

1. Open Learning → Assistant access.

2. Select Enable AI replies when you are ready to allow AI responses.

3. Select Published general knowledge for published company/property material.

4. Decide separately whether to permit Tenant lease details; Tenant invoices, balances and payment history; Tenant maintenance status; and Private lease documents.

5. Save permissions. Test with a tenant account and a question whose answer you can independently verify.

Enabled sources may be sent to OpenAI to answer questions. Private records are limited to the signed-in tenant's permitted data. Having all services included does not turn on every private-data permission. These permissions do not authorize the assistant to approve leases, record payments or issue permits.

Add learning material

Section	How to use it
Website links	Import a public website link, then inspect the extracted content
Documents	Upload supported PDF, Word, Excel or text material
Questions & FAQs	Write a question/answer or upload a collection of FAQs

1. Choose the source section and add a descriptive title.

2. Set Audience to the appropriate company, property or available private lease scope. A building rule should not inadvertently become company-wide advice.

3. Enter the text/link or upload the file. Follow the file format/size rules displayed by the uploader.

4. Open the saved material and inspect the text. Scanned/image-only files may not yield usable learning text; supply readable text if necessary.

5. Edit incorrect or outdated content, then publish it when approved.

A website import captures content at import time; do not assume it continuously follows website changes. A saved draft is not automatically published for answers.

View, edit, pause and delete

Open a material's title to view it. Use Edit to change its title, audience or learning text. Publish makes eligible material available; Pause removes it from AI use while retaining it for later. Delete removes it from active learning; use the deleted-material view and Restore where available. After restoration, check its publication state before expecting it in answers.

Review material whenever policies, contacts, opening hours or property rules change. Avoid contradictory published FAQs. Test again after changing permissions or publication state.

Tenant questions and human handoff

The tenant opens Chat and asks a question. AI uses the permitted learning and tenant sources. If the tenant requests a human or the assistant escalates, the conversation enters the Support queue.

Authorized support staff open Support, claim/take over the conversation, reply, and mark it resolved when finished. A colleague who has already claimed a thread must coordinate before another person takes over. The tenant sees staff replies in the same conversation. The company owner may review the conversation but is not a replying support agent.

Email escalation

The administrator can configure an escalation address. Email delivery also needs the server's support-email sender configuration. Registration verification mail and support escalation are separate configurations; a working verification email does not prove escalation mail is ready. If the interface reports email unavailable, continue in-app handoff and contact platform support to configure the sender.

Troubleshooting

• No AI answer: check Enable AI replies, server AI readiness and any displayed error.

• General answer is missing: check publication, pause/deletion state, audience and source quality.

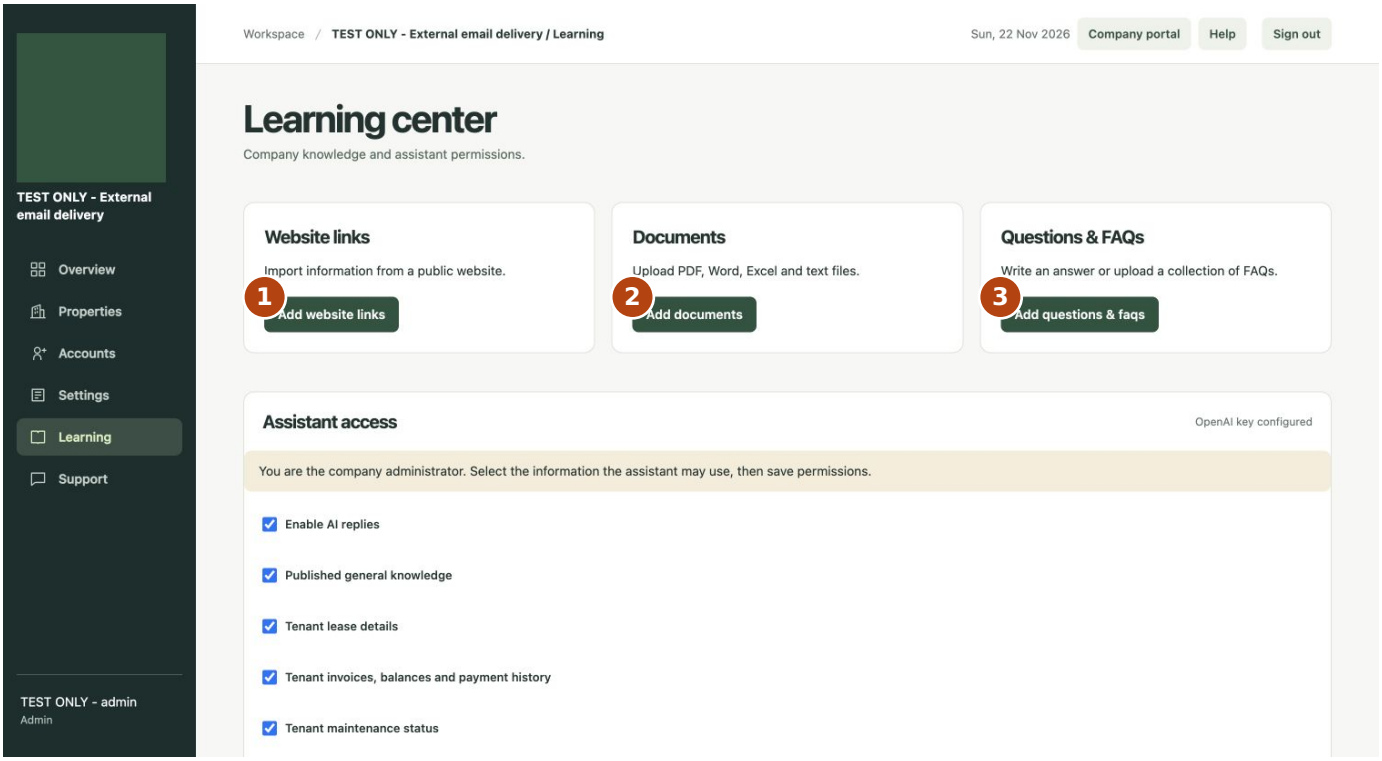
• Lease/balance answer is missing: check the corresponding permission and tenant/lease linkage.

• Wrong answer: correct the source, pause misleading material and escalate to a person. Do not use an AI answer as evidence of payment or approval.

• Controls are read-only: verify company administrator privileges; owner access intentionally differs.

Where to click

Screenshot walkthrough



1. Add website links — Import information from a website.

2. Add documents — Upload reference documents.

3. Add questions & faqs — Write answers or upload FAQs.

Example from a synthetic test company. Available actions depend on your role and record status.

Tenant portal — everyday tasks

Operations help · Reviewed 22 November 2026

First sign-in

Use the Tenant portal link on your company's branded page and your own credentials. Leasing creates your account and links it to your tenancy. Confirm your visitor approval preference when prompted. On mobile, use the bottom navigation to reach the available sections.

Your portal shows your own linked records. A single-tenancy user should not need to choose the property repeatedly. If your lease or unit is missing, ask Leasing to check account linkage, approval and dates.

Your lease and documents

Open Leases to see the property/unit, tenant name, start/end dates, agreed rent and status. Select Preview for an attached document; use the preview's download/open controls when needed. No document is shown until Leasing attaches it. You cannot edit or approve the contract from this screen.

Maintenance

1. Open Maintenance → New request.
2. Describe the fault and location clearly and choose an appropriate priority.
3. Submit once and inspect its status.
4. Open the request to follow assignment, progress or a rejection reason.

You are requesting work, not assigning a vendor or approving a quotation. A missing active lease can prevent submission; contact Leasing rather than making an unrelated request. Use your property's emergency contact process for urgent danger instead of waiting for app review.

Billing

Open Billing to see invoices, outstanding balance and payment history. Download invoice PDFs and receipts for recorded payments. A bank transfer or cheque is not reflected until Finance records it; send payment queries/evidence through your company's agreed process. The portal tracks billing and does not itself initiate a bank transfer.

Visitors

Choose whether to approve every visit, auto-approve deliveries only or auto-approve all visits. For pending arrivals, check visitor details and approve or decline. Saved preferences affect new arrivals, not existing pending ones. Keep the app open for in-app updates; SMS and background push are not part of this notification flow.

Guard check-in/check-out records physical arrival and departure separately from your approval. Your notification does not include the visitor's private ID photos or ID number.

Moving out

Open Move permits, enter your planned date and notes, then submit. Leasing and Finance must clear the request before Management approves it. Wait for final Approved status. Read rejection notes and resolve the problem before making a new request. Approval does not automatically settle bills or end the lease.

Chat

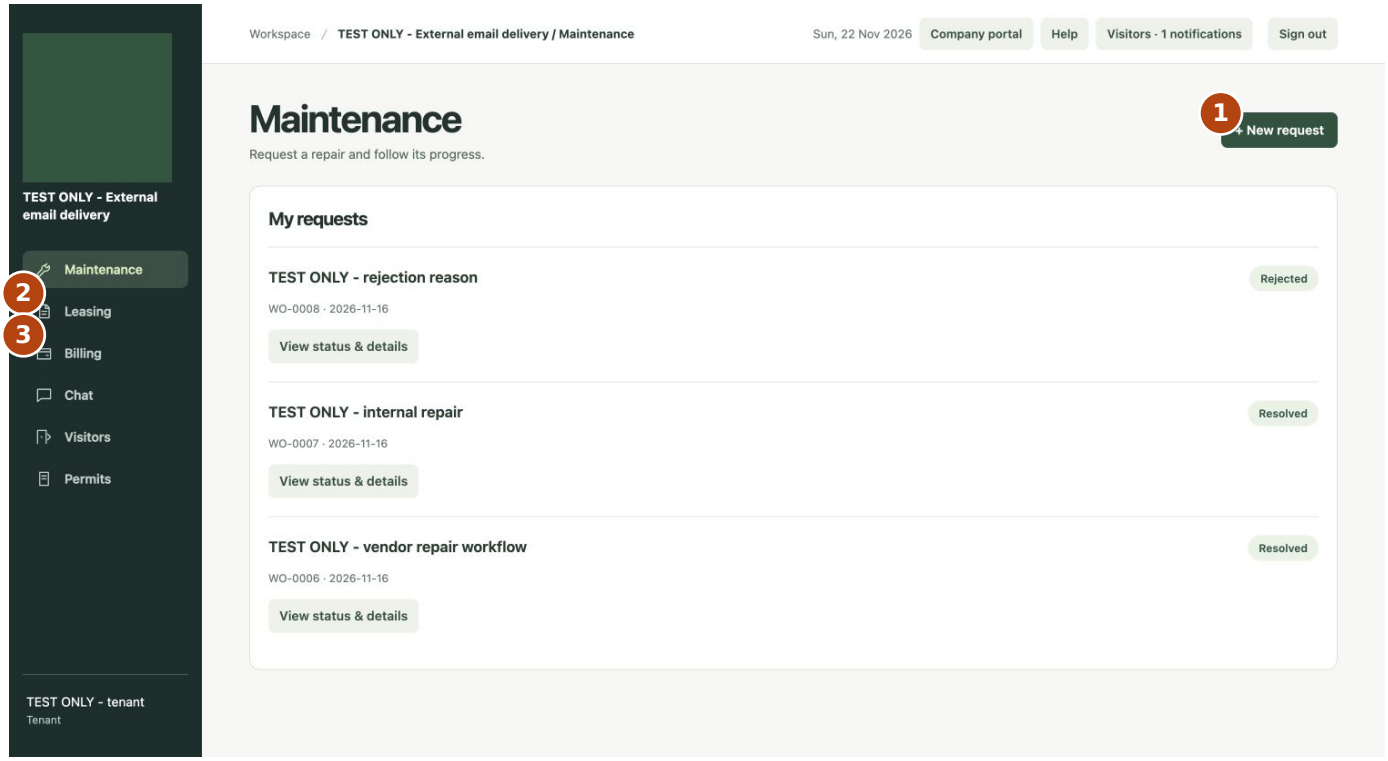
Open Chat for general questions. It can answer about your lease/billing only where your company administrator has enabled those sources. Request human support for a specific issue or uncertain answer; staff replies appear in the same thread. Chat is not a substitute for a formal maintenance request, payment record or move-out permit.

Need help?

Contact Leasing for lease/account details, Finance for invoices/payments, Maintenance for repair handling and the property/security team for visitor access. Include the relevant record number and description, not another user's password.

Where to click

Screenshot walkthrough



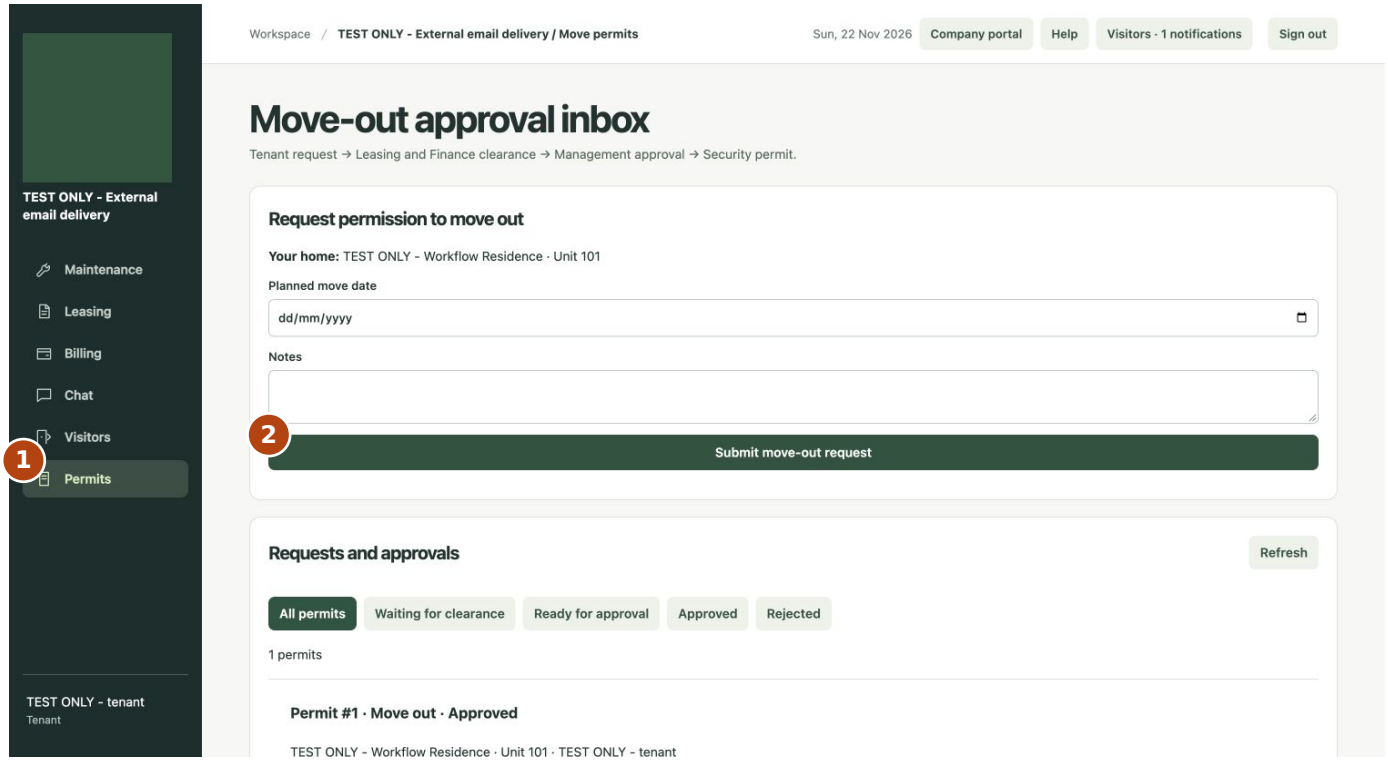
1. + New request — Request a repair for your tenancy.

2. Leasing — View your lease summary and attachments.

3. Billing — Check invoices, receipts and outstanding balances.

Example from a synthetic test company. Available actions depend on your role and record status.

Screenshot walkthrough



1. Permits — Open your move-out requests.

2. Submit move-out request — After entering the move date and notes, submit for Leasing and Finance clearance.

Example from a synthetic test company. Available actions depend on your role and record status.

Vendor portal — quotations and work updates

Operations help · Reviewed 22 November 2026

Getting access

The maintenance manager creates your vendor account and trade profile. Sign in through the company's Vendor portal with your individual credentials. You see work assigned to your vendor account, not the full property portfolio.

Handle an assigned repair

1. Open the assigned request and review the property/unit, issue, priority and notes.

2. Inspect the quotation/parts requirement and coordinate attendance with the maintenance team under the property's process.

3. If quotation is required, submit the amount and a clear note describing the proposed work and parts.

4. Wait for approval. Awaiting approval does not authorize chargeable work.

5. When Ready for work, record Begin when work starts.

6. On completion, record Resolve and a useful completion note. The tenant and maintenance team can then see the resolved status.

If the quotation is declined, the job returns to Assigned so you can revise the quotation with the maintenance team. Do not mark it resolved to bypass approval.

Access or detail changes

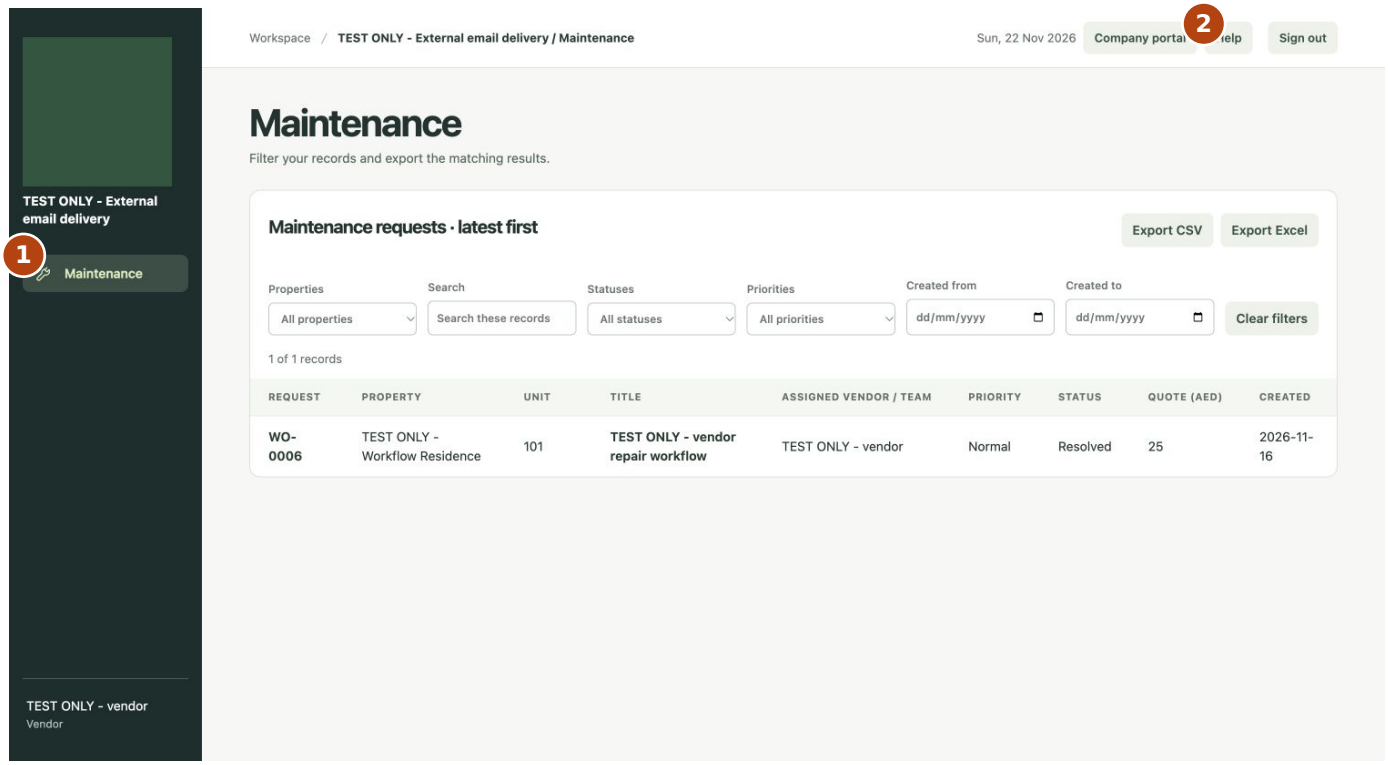
Ask Maintenance → Vendor management to edit your contact details/trade or optional licence attachment. A suspended vendor cannot sign in or receive new assignments until reactivated. If a job is missing, check that it was assigned to your account, not another vendor or an internal team.

Financial distinction

An approved quotation is permission in the repair workflow. It is not proof of vendor payment and does not automatically create a supplier invoice/payment. Coordinate invoicing and settlement with the company separately.

Where to click

Screenshot walkthrough



1. Maintenance — Open the requests assigned to this vendor.

2. Help — opens guide in a new tab — Read quotation and work-status instructions.

Example from a synthetic test company. Available actions depend on your role and record status.