# Admin Portal


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# Getting Started

The Admin Dashboard and how the LeaseOps team works the queues.

# Admin Dashboard

The Dashboard is your starting point each day. It shows what needs the LeaseOps team's attention across the whole platform — unread messages, contact requests, and owner changes waiting for review.

> ? Screenshot: the Admin Dashboard.

## Today's counts

Five cards count the work waiting for you. Each card is a shortcut — select one to open that queue.

| Card | Counts | Opens |
|---|---|---|
| Contact Us Requests | Applicant contact requests, with an "unanswered" tag | The contact-us queue |
| Property Owner Messages | Unread messages from owners | Messages from owners |
| Applicant Messages | Unread messages from applicants | Messages from applicants |
| Portfolio Reviews | Owner content changes waiting for review | The review queue |
| Publication Requests | Properties waiting to be published | The publication queue |

## Portfolio changes awaiting review

Below the counts is your main work queue: the owner changes that need a decision. A counter shows how many are **pending**.

- Use the **Queue** filter to narrow the list. Select **Everything** to see all pools.
- Select **Review** on an item to open it and decide.

When the queue is clear, it reads **"No portfolio changes are waiting for review."**

Related: to review owner scoring-rule changes, see **Scoring Review**.

# People

Manage applicants, owners, and platform users.

# People

People is your directory for everyone on the platform — applicants, owners, and users. Use it to find a person or a record and open it.

> ? Screenshot: the People directory.

## What the directory holds

The screen groups people into tiles. Select a tile to open its list.

**Applicants** — everyone applying for a home:

- **Questionnaires** — submitted pre-qualification questionnaires.
- **Submitted Applications** — completed applications.
- **Guest Card Applications** — guest card entries.
- **Withdrawn Applications** — applications that were pulled.

**Owners** — the property owners you serve. See Owners.

**Users** — the people with a login on the platform. See Users.

To work with applicants in detail, see Applicants.

People

# Applicants

This is where you track everyone applying across the platform. The work is split into lists, so you can focus on one type at a time.

> “ ? Screenshot: an admin applicant list.

## The lists

| List | Holds |
|---|---|
| Applicants | Everyone applying — "Manage and view all applicants" |
| Questionnaires | Submitted pre-qualification questionnaires |
| Submitted Applications | Completed applications |
| Guest Card Applications | Guest card entries |
| Withdrawn Applications | Applications that were pulled |
| Contact Us Requests | Questions sent through the contact form |

## Work a list

Each list works the same way:

- **Search** to find a person fast.
- Filter by **status** where the list offers it.
- Select **Export** to download the list (where available).

## Open one applicant

Select a row to open the applicant. From there you can see their **questionnaire** and their **application** in full.

The **Withdrawn** list shows the applicant, email, property, and the date they withdrew.

# Owners

Owners is your directory of the property owners you serve. Use it to find an owner and manage their account, users, properties, and billing.

> ? Screenshot: the Owners list.

## Read the list

The table covers owners across every region.

| Column | Shows |
| --- | --- |
| Owner Name | The company or owner name |
| Region | Where the owner operates |
| Users | How many users the owner has |
| Properties | How many properties the owner has |
| Billing | The owner's billing status |

## Add or edit an owner

Open an owner, or add a new one, and set their **Company Details**:

- **Company / Owner Name**
- **Region**

From an owner you reach their users, their properties, and their billing.

People

# Users

Users is your directory of everyone with a login on the platform. Use it to add a user, set their roles, and check their account.

> ? Screenshot: the Users list.

## Read the list

| Column | Shows |
|---|---|
| Email | The user's sign-in email |
| Relationship | How the user is tied to the platform |
| Roles | The roles that set what the user can do |
| Email Verified | Whether the user confirmed their email |
| Actions | Edit the user |

A user who is switched off shows an **Inactive** status.

## Add or edit a user

Open a user, or add a new one, and set:

- **First Name** and **Last Name**
- **Email**
- **Relationships** — how the user connects to owners or properties
- **Roles** — what the user is allowed to do

Roles control access, so set them with care.

# Properties

Create and manage properties: details, listing content, units, screening, and settings.

# Properties & Creating a Property

The Properties screen is your command view of every property on the platform. Use it to find a property or add a new one.

> “ ? Screenshot: the Properties list.

## Find a property

Type in the search box to filter the list. The table shows each property with its **Neighborhood**, **Owner**, and **Listing** status.

## Create a property

Select **Create** (or **Add Property**) to start a new one. You then set its basic details. See Property Overview for what a property holds.

After you create a property, you build it out: details, listing content, units, screening, and settings. The rest of this chapter covers each part.

# Property Overview

Open a property to reach everything about it in one place. The overview shows the property's key facts and links to each part you can edit.

> ? Screenshot: the property overview.

## The key facts

The overview shows the property at a glance:

- **Property Name**
- **Contact Number**
- **Total Units**
- **Owner**
- Address — **Street**, **City**, **State**, **ZIP Code**

## What you can edit

From a property you reach each part of its setup:

- **Details & ownership** — the basics, who owns it, and its owner users. See Details & Ownership.
- **Listing content** — what applicants see. See Listing Content.
- **Units & unit types** — the homes and their price bands. See Units & Unit Types.
- **Questionnaire scoring** — how applicants are scored. See Questionnaire Scoring.
- **Listing page content review** — the owner's onboarding submission. See Listing Page Content Review.

# Details & Ownership

This is where you set who owns a property and its core facts.

> “ ? Screenshot: the property basic details.

## Basic details

Set the property's fundamentals. Required fields are marked.

- **Property name**
- **Owner**
- **Property Ownership**
- Visibility — set the property **Public** when it is ready to show.

## Change the owner

Use **Ownership** to see who owns the property right now, or to hand it to a different owner.

1. Open **Ownership**.
2. Choose the **New owner**.
3. Confirm the transfer.

## Owner users

The **People** section lists the owner's users tied to this property. For each you see their **Email**, **Status**, and **Messages**. If none are linked, it reads *"No owner users found."*

# Listing Content

Listing content is everything an applicant sees about a property. Set it here so the public listing looks right.

> “ ? Screenshot: a property's listing content.

## Amenities

Add the amenities the property offers. You can add a **custom amenity**, or remove one you no longer need.

## Call-to-action buttons

Set the property's action buttons in their **Slots** — the labels applicants tap to contact or apply. Select **Discard Changes** to drop edits you have not saved.

## Flyers

Manage the property's flyers. Search and filter by **Type** and **Status** to find one.

## Special offers

Add the offers an applicant should see. Search and filter by **Type** and **Status** the same way.

Each part feeds the public listing, so keep it current and accurate.

# Units & Unit Types

A property's homes are set up as **units** and **unit types**. Unit types set the price bands; units are the individual homes.

> “ ? Screenshot: the property units.

## Unit types

A unit type is a floor plan with a price range. Add one and set:

- **Min Price** and **Max Price** — the price band.
- **Media** — photos for the type.

Before you add any, it reads *"No unit types added yet."*

## Units

A unit is one home of a given type. Add one and set its **Unit Name**, **Unit Type**, and details such as **Baths**.

Before you add any, it reads *"No units added yet."*

Set your unit types first, then add units against them.

# Questionnaire Scoring

Each property has its own questionnaire scoring — the points that decide how applicants rank. This is the admin view of the same rules owners set.

> ? Screenshot: the property questionnaire scoring.

## Set the rules

Set the points for each answer, the pass score, and the starting score for this property. The screen works like the owner's scoring editor.

For a full walk-through of pass scores, starting points, and per-question points, see the Owner Portal pages:

- Pass Score & Starting Points
- Rules by Question

## Reset

To drop this property's changes and return to the master defaults, use the reset action. It shows **"Resetting…"** while it runs.

# Listing Page Content Review

When an owner submits their property content, you review it here before it goes live. This is the admin side of the owner's onboarding worksheet.

> ? Screenshot: the listing page content review.

## Request the content

You start the process by asking the owner for their content. From the property's **Settings**, send the request:

- **Send From Here** — send it straight away.
- **Send From Communications Page** — send it with the rest of your owner messages.

The owner then fills the worksheet. See the owner's side in [Adding a Property].

## Review each section

When the owner submits, review their content section by section. For each section you can approve it or reject it. A rejected section returns to the owner with your **Admin feedback**, so they can fix it and resubmit.

If the owner has not started, the screen reads *"Listing page content review not started."*

# Scoring Review

Scoring Review is where you approve the scoring changes owners make. When an owner edits their portfolio-level questionnaire scoring rules, the change waits here until you decide.

> ? Screenshot: the Scoring Review queue.

## Read the queue

The queue lists each change awaiting review, with its **Owner** and **Portfolio**, under the heading *"Scoring changes awaiting review."* Each item shows its status.

## Approve or reject

For each change:

- **Approve** — the new rules take effect.
- **Reject** — the change is turned down. Add feedback so the owner knows why.

Owners see the outcome on their side. For the owner's view of scoring, see Overview & Inheritance.

# Billing

Billing shows how owners are enrolled and what they pay. Use it to track revenue and spot owners who are past due.

> ? Screenshot: the Billing screen.

## See the numbers

Four cards give you the health of enrollment at a glance.

| Card | Tells you |
|---|---|
| Total Enrolled | How many owners are enrolled |
| Active | How many are paying and current |
| Past Due | How many owe a payment |
| Monthly Revenue | What you are billing per month |

## Work the list

- **Search** to find an owner.
- Filter by **Status** to focus on one group, such as past due.
- Select **Export** to download the list.

# Reports

Reports is where you pull the numbers you need about the platform. Each report covers one area, and you can export what you find.

> ? Screenshot: the Reports screen.

## The reports

| Report | Covers |
|---|---|
| Special Offers Report | The offers running across properties |
| Unresolvable Addresses | Addresses the system could not match |
| Properties Report | Your properties |
| Tenants Report | Your tenants |
| Financial Report | Money in and out |
| Maintenance Report | Maintenance activity |
| Custom Reports | Reports you build to your own needs |

## Use a report

1. Open the report you need.
2. Read or filter the results.
3. Select **Export** to download it.

# Settings

Platform-wide settings: neighborhoods, unit types, resident benefits, publish rules, housing laws, the master questionnaire, and AI compliance.

# Settings

Settings holds the platform-wide defaults that shape every property and listing. Set them once here, and they apply across LeaseOps.

> ? Screenshot: the Settings hub.

## What Settings holds

The settings sit in tiles, grouped into three sections. Select a tile to open its editor.

#### General

- **Neighborhoods** — the locations your properties sit in. See Neighborhoods & Places.
- **Neighborhood Places** — the establishments near your neighborhoods.
- **Unit Types** — the master list of unit-type labels. See Unit Types.

#### Property Listing Page

- **Resident Benefits** — the benefits owners can show. See Resident Benefits.
- **Publish Requirements** — what a property must have before it can go live. See Publish Requirements.

#### Laws & Scoring

- **AI Compliance** — the record of AI reviews. See AI Compliance.
- **Housing Laws** — the housing laws you apply. See Housing Laws.
- **Master Questionnaire** — the master scoring rubric. See Master Questionnaire.

Settings

# Neighborhoods & Places

Neighborhoods are the locations your properties sit in. Set them up so listings show the right area and nearby places.

> ? Screenshot: the Neighborhoods list.

## Neighborhoods

The list shows each neighborhood with its **City, State**, how many **Properties** it holds, its **Highlights**, and when it was **Created**. Use the **Filters** to narrow the list.

Add or edit a neighborhood to set its location and highlights.

## Neighborhood Places

Neighborhood Places are the establishments near your neighborhoods — the spots you show on a listing. The list shows each place with its **City, State** and the **Neighborhoods** it belongs to.

Add a place and link it to one or more neighborhoods. A place with no location reads *"No city yet."*

Settings

# Unit Types

Unit Types is the master list of unit-type labels every property draws from. Set them here so all properties use the same names.

> ? Screenshot: the Unit Types list.

## Read the list

The list shows each unit type with its **Bedrooms** count, its **Status**, and **Actions** to edit it.

## Add or edit a unit type

Add a unit type and set its label and **Number of Bedrooms**. Set its status to control whether properties can use it.

These labels feed each property's own unit types. See Units & Unit Types.

Settings

# Publish Requirements

Publish Requirements set what a property must have before it can go live. Turn a requirement on to make it a gate; turn it off to let properties publish without it.

> ? Screenshot: the Publish Requirements screen.

## Set your requirements

The requirements are grouped — for example, **Preconditions** and **Landing page** items.

- To make an item required, select **Start requiring it**.
- To drop it, select **Stop requiring it**.

## See who is affected

The screen tells you how many properties meet each requirement and how many do not, so you know the impact before you change a rule.

Settings

# Housing Laws

Housing Laws is where you manage the housing laws LeaseOps applies. These laws keep screening compliant across properties.

> ? Screenshot: the Housing Laws screen.

## Manage the laws

Add, edit, or review each housing law from this screen. The laws you set here feed the scoring rules, so applicants are screened within the law.

Related: laws shape questionnaire scoring. See the Master Questionnaire and the owner-facing Rules by Question.

Settings

# Master Questionnaire

The Master Questionnaire is the scoring rubric every property starts from. Set the master rules here, and each property inherits them until it customizes its own.

> ? Screenshot: the Master Questionnaire Scoring screen.

## Choose a profile

The rubric is set per questionnaire profile.

1. Use **Select Questionnaire Profile** to pick the profile you want.
2. The screen shows the **Current Profile** you are editing.

## Set the scoring

For the chosen profile, set:

- **Pass Score Configuration** — the score an applicant must reach.
- **Starting points** — the score every applicant begins with.
- The points for each question.

Properties and portfolios inherit this master rubric. For the owner's view, see Rules by Question.

# AI Compliance

AI Compliance is the record of how LeaseOps uses AI in screening. It keeps AI reviews and their training examples in one place, so your process stays accountable.

> ? Screenshot: the AI Compliance screen.

## What it holds

- **Reviews** — the AI reviews on the record.
- **Training examples** — the examples that guide the AI.

Use this screen to check the record and keep it current.

# Resident Benefits

Resident Benefits is the master list of benefits owners can switch on for their listings. Set them here so every owner picks from the same set.

> ? Screenshot: the Resident Benefits list.

## Add or edit a benefit

Add a benefit and set:

- **Description** — what the benefit is.
- **Icon (MDI name)** — the icon shown on the listing.
- **Link (URL)** — a link with more detail, if there is one.

Use **Actions** on a row to edit or remove a benefit.

Owners choose from these benefits on their side. See the owner view in Portfolio Settings.

# Messages

Messages is where the LeaseOps team talks with owners and applicants. Every conversation is a **thread**, so replies stay together.

> ? Screenshot: the admin inbox.

## Find a conversation

Your threads sit in a list, grouped so the important ones surface first:

- **Unread** — threads with new replies.
- **This week** — recent threads.
- **Open threads** — everything else still open.

Search by name, unit, or message text to find one thread. Your Dashboard also splits the counts into **Property Owner Messages** and **Applicant Messages**, so you can jump straight to either.

## Read and reply

1. Select a thread to open it.
2. Type your reply at the bottom.
3. To send a file, select **Attach file**.
4. Select **Send**.

# Profile

Profile is where you manage your own admin account and keep your sign-in secure. Each card shows a status, so you can see what needs attention.

> ? Screenshot: the Profile hub.

## General

### General Information

Keep your name and contact details current.

1. Select **General Information**.
2. Edit your **First Name**, **Last Name**, **Email**, or **Cell Phone**.
3. Save your changes.

### Profile Image

Add the photo shown across your account. Use a JPG or PNG file.

## Security

### Passkeys

A passkey lets you sign in without a password, using your device. It is the strongest way to protect your account, so we recommend it.

1. Select **Passkeys**.
2. Add a passkey, and follow your device's prompt.

# About & Help

What this portal is, common questions, troubleshooting, and policies.

# Overview

The Admin Portal is the LeaseOps team's control center. From here you manage owners, properties, and applicants, review the changes owners submit, and set the platform-wide rules.

## Who uses it

The LeaseOps internal team. Access depends on each user's roles.

## What you can do

- **Work the queues** — handle what needs attention each day. See Admin Dashboard.
- **Manage people** — owners, applicants, and users. See People.
- **Manage properties** — build and maintain each property. See Property Overview.
- **Review owner changes** — scoring and listing content. See Scoring Review and Listing Page Content Review.
- **Set platform rules** — laws, scoring, benefits, and publish gates. See Settings.

## New here?

Start with the Admin Dashboard. For quick answers, see the FAQ.

About & Help

# FAQ

Short answers to the questions the team asks most.

## Where do I start each day?

The Admin Dashboard. It shows what needs your attention — unread messages, contact requests, and owner changes waiting for review.

## How do I review an owner's scoring change?

Open Scoring Review. Approve the change to make it live, or reject it with feedback.

## How do I review an owner's listing content?

Open the property's Listing Page Content Review. Approve or reject each section. A rejected section returns to the owner with your feedback.

## Why can't a property publish?

It has not met every publish requirement. Check Publish Requirements to see which gate is unmet.

## Where do I manage housing laws or the master scoring?

Under Settings — see Housing Laws and Master Questionnaire.

## How do I add an owner or a user?

Use Owners and Users under People.

# Troubleshooting

Common problems and how to fix them.

## An owner's change hasn't taken effect

It is likely still in a review queue. Check the Admin Dashboard, Scoring Review, or the property's Listing Page Content Review. A change is live only after it is approved.

## A property won't publish

Open Publish Requirements. The screen shows which requirements the property has not met. Clear each one, then publish.

## An owner says their listing is missing content

Check the property's Listing Page Content Review. If a section was rejected, it went back to the owner with feedback and needs resubmitting.

## I can't find a setting

Platform-wide rules live under Settings. Property-specific settings live on the property itself. See Property Overview.

## The review queue looks empty

When nothing is waiting, the Dashboard reads **"No portfolio changes are waiting for review."** That means you are caught up.

# Policies

The rules that govern how the team approves and publishes.

## Owner changes are reviewed before they go live

Owners submit changes; the team approves them. This keeps listings accurate and compliant.

- **Listing content** — reviewed section by section before a listing publishes.
- **Scoring changes** — reviewed before they take effect.

Approve a change to make it live. Reject it with **feedback** so the owner knows what to fix.

## Publishing is gated

A property can only publish when it meets every active publish requirement. Set these gates in Publish Requirements. Turning a gate on affects every property that does not yet meet it.

## Scoring follows housing law

The master scoring rubric is built to follow housing law. Manage the laws in Housing Laws and the rubric in Master Questionnaire.