

Portfolio

Manage your portfolio: shared settings your properties inherit, and the property roster.

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Portfolio Overview

A **portfolio** groups your properties and the settings they share. Set a rule once for the portfolio, and every property follows it. This saves you from setting up each property from scratch.

You work with your portfolio through two screens:

- **Portfolio Settings** — the rules your properties share.
- **Properties** — the list of properties, and how each one relates to those rules.

“ ? Screenshot: the Portfolio Settings screen.

Why inheritance matters

Inheritance is what makes a portfolio worth using. Each property starts by following the portfolio's tenant-intake settings. Change the portfolio once, and every following property changes with it.

When one property needs something different, you customize just that property. It then keeps its own value and ignores later portfolio changes for that setting.

The Properties screen shows the state of each setting at a glance:

- **Inherits** — the property follows the portfolio.
- **customized** — the property uses its own value.

Where to go next

- Set your shared rules in **Portfolio Settings**.
- See your roster and open a property in **Properties**.

Portfolio Settings

Set the rules your properties share, all in one place. Every following property picks up what you set here, so you avoid repeating the same work across properties.

“ ? Screenshot: the Portfolio Settings hub.

Rename your portfolio

The portfolio name appears in the portfolio switcher and on each property's inheritance banner. A clear name helps your team pick the right portfolio.

- 1. Select **Rename**.
- 2. Type the new name.
- 3. Select **Save name**.

Open a setting to edit it

Each setting sits in a tile, grouped into four sections. Select a tile to open its editor. A tile with a lock icon is not ready yet; it reads *"Portfolio-level editor coming soon."*

01 / General — who your applicants are and who runs the portfolio.

Tile	Set
Income & Assistance	The income levels and assistance you accept
Internal Contacts	Your portfolio staff and operational contacts

02 / Property Listing Page — what applicants see on your listings.

Tile	Set
Amenities	The amenities you show applicants
Animal Policy	Your pet rules, in your own words

Tile	Set
Call-to-action Buttons	The labels and style of your listing buttons
Resident Benefits	The benefits you include with a lease

Custom resident benefits go to LeaseOps for review. They appear on your listings once we approve them.

03 / Questionnaire — how you screen and score applicants.

Tile	Set
Assistance Animals	Your ESA and service animal policies
Payment Requirements	The payment methods you accept
Questionnaire Scoring Rules	The points each questionnaire section carries

04 / Service Terms — your commercial terms with LeaseOps.

Tile	Set
Advertising	Your advertising limits
Billing & Payment	Coming soon
Lease Template	Coming soon

Properties

See every property in your portfolio in one list, and tell at a glance which ones follow your shared rules and which have their own.

“ ? Screenshot: the Properties roster.

Read the roster

Each row is one property. The columns tell you its state.

Column	Tells you
Property	The property name and address
Status	Whether the property is active
Inheritance	Which settings the property inherits, and which it customized

The inheritance chips are the quick read:

- **Inherits** — the property follows the portfolio for that setting.
- **customized** — the property set its own value, so portfolio changes no longer reach it.

If the portfolio has no properties yet, the list reads *"No properties yet in this portfolio."*

Open a property to change it

1. Find the property.
2. Select **Open**.

Inside a property you reach its own settings — units, address, and leases — and you can customize any setting it currently inherits.