Owner Portal

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Getting Started

Adding a Property

You add a property by filling in its **onboarding worksheet**. The LeaseOps team invites you by email. You upload photos and details. Your answers build the property's public listing page.

You do not build a property from a blank form. You complete the worksheet we prepare for you.

> ? Screenshot: the Property Onboarding worksheet, top of the page.

Before you start

Have these ready. The worksheet takes about 15 minutes.

- Property photos (JPG or PNG, up to 10 MB each)
- A one-line note about the neighborhood
- Rent ranges for each unit type

Step 1 — Open the invite

1. Open the email with the subject **"Property Content Request."**
2. Select **"Upload property content."**

The **Property Onboarding** worksheet opens in the Owner Portal.

Step 2 — Fill in each section

The worksheet has nine sections. They match the layout of your listing page.

> ? Screenshot: one section open, showing a field and the **Submit for review** button.

#	Section	What to enter
01	Call-to-action buttons	The labels for your contact and pre-qualify buttons
02	Hero images	Your main property photos
03	Identity block	Property name, street, city, state, ZIP, and phone
04	Living at [property]	Your marketing text about the property
05	Amenities	The features your property offers
06	Animal policy	Your rules for pets and animals
07	Your neighborhood	A short blurb and one photo
08	Availability & pricing	Unit types, units, and rent ranges
09	Resident benefits	The benefits you include with a lease

The worksheet saves as you type. Watch the bar at the top:

- **"Saving…"** — your work is saving now.
- **"All changes saved."** — your work is safe.

Step 3 — Submit a section for review

1. Finish a section.
2. Select **"Submit for review."**

The status changes to **"Pending approval."** Our team then checks your entry.

You can submit each section on its own. You do not need to finish the whole worksheet first.

Step 4 — Answer any feedback

If we cannot approve a section, you see **"Admin feedback:"** with the reason.

1. Read the note.
2. Fix the section.
3. Select **"Submit for review"** again.

What happens next

When we approve every section, your property goes live. Its listing page opens for applicants.

Getting Started

Dashboards

You have two dashboards. Each answers a different question.

- The **Portfolio Dashboard** answers *"How is my whole portfolio doing, and what needs me?"*
- The **Property Dashboard** answers *"How is this one property doing?"*

Open each from the sidebar.

Dashboard	How to open it	Use it to
Portfolio Dashboard	Select **Dashboard** at the top of the sidebar	See across every property and act on what LeaseOps needs
Property Dashboard	Open a property, then select its **Dashboard**	Check one property's setup and applications

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Portfolio Dashboard

This is your starting point each day. It pulls every property into one view, so you can spot what needs you and track how the whole portfolio is doing.

> ? Screenshot: the Portfolio Dashboard.

Act on what needs you

When work needs you, the dashboard surfaces it at the top in two panels. When you have nothing waiting, neither panel appears — so a clear top means you are caught up.

- **Needs your action** — shows when something needs a decision: approvals and change requests from across your properties. A badge counts them. For each item, **Open** it to act, **Discard** it to remove it, or select **Got it** to acknowledge it.

- **Awaiting LeaseOps response** — shows when you have items in review. You already sent them, so nothing is needed from you. LeaseOps tells you when there is a decision.

Reach your teams

- **Your LeaseOps Team** — your LeaseOps contacts. Message any of them without leaving the page.
- **Your Internal Team** — your own staff. Add people here to share the work. Until you do, it reads *"No internal team members have been added yet."*

Track the portfolio

Six cards give you the numbers that matter across all properties.

Card	Tells you
Active properties	How many properties are live
Total units	How many units you manage in total
Vacant units	How many units are empty and need filling
New applications	How many applications arrived in the last 7 days
Applications (lifetime)	How many applications you have received in all
Approved this month	How many applicants you approved this month

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Property Dashboard

Open one property to focus on it alone. Use this dashboard to check the property is set up well and to watch its applications.

> ? Screenshot: the Property Dashboard.

Reach your team

Your LeaseOps Team lists your LeaseOps contacts, each with their role and details. Message any of them from here.

Watch the application trend

Applications Over Time shows whether interest in this property is rising or falling. It plots the property's applications month by month.

Check the setup

Five cards show how complete this property is. Low numbers point to gaps to fill.

Card	Tells you
Total Units	How many units this property has
Available Units	How many units are open to applicants now
Unit Types	How many unit types (floor plans) you set up
Unit Type Images	How many photos you added to the unit types
Property Images	How many photos you added to the property

Portfolio

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

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

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
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

Portfolio

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.

Applicants

Track and review applicants for your properties, then accept or decline them.

Applicants Dashboard

This is where you keep applicant work moving. See what is waiting across your properties, then jump straight to the list you need.

> ? Screenshot: the Applicants Dashboard.

See what is waiting

Four cards count the work in front of you, so you know where to start.

Card	Counts
Applications	Rental applications waiting for a decision
Guest Cards	Guest card entries
Contact Us	Contact requests you have not answered
Inactive Leads	Leads that have gone quiet

Jump to a list

Each card below the counts opens a working list. Select the one you need.

Card	Where it takes you
Applications	Review and decide on rental applications
Guest Cards	Handle guest card entries and visitor details
Contact Requests	Answer inquiries and track your replies
Inactive Leads	Revisit quiet leads and forward them
Leases	Manage lease agreements and terms

To decide on a single applicant, open **Applications**, then select the person. See **Reviewing an Applicant**.

Applicants

Reviewing an Applicant

Open an applicant to make a decision. This page gathers everything you need — their answers, their score, and their documents — so you can accept or decline with confidence.

> ? Screenshot: an applicant detail page.

Judge the applicant

- **Score** — how the applicant did against your questionnaire scoring rules. It is your quick read on fit.
- **Status** — where the applicant stands right now.
- **Activity** — a timeline of what happened and when. It fills as the application is submitted, scored, and actioned.

Check the evidence

Open each document to see the full picture before you decide. A document appears only when the applicant has it.

- **View questionnaire results** — the applicant's answers and how they scored. Always available.
- **View application** — the full application. Appears once the applicant completes one.
- **Download credit report** — the applicant's credit report. Appears when a report is on file.

Work with your team

- Add an **internal note** to record your team's thinking. Notes stay private to your team; the applicant never sees them.
- Use **Reassign reviewer** to hand the applicant to a teammate.

Make the decision

Decide with the buttons at the bottom of the page.

- **Accept** — approve the applicant.
- **Decline** — reject the applicant. Add a **Reason** so your team has a record.

Changed your mind? After you decline someone, the **Accept** button becomes **Undecline**. Select it to reverse the decline.

Your decision updates the applicant's status and adds an entry to the activity timeline.

Laws & Scoring

Laws & Scoring is a quick way into your scoring tools for one property. It does not hold settings itself; it points you to the screen that does.

> ? Screenshot: the Laws & Scoring hub.

The shortcut

The screen offers a shortcut card. Select it to open the tool.

Card	Opens
Questionnaire Settings	Your scoring rules, pass scores, and questionnaire profiles for the property

To set your rules, open **Questionnaire Settings**. The full steps are in **Questionnaire & Scoring Settings**.

Questionnaire & Scoring Settings

Set how LeaseOps scores your applicants: the pass score, starting points, and the points for each question.

Overview & Inheritance

Scoring is how LeaseOps ranks your applicants for you. You decide what a strong applicant looks like — the bar to clear, the score to start from, and the points each answer earns. LeaseOps then scores every applicant the same way, so your decisions stay fair and consistent.

> ? Screenshot: the Questionnaire Scoring Rules screen.

Decide where a rule applies

You set scoring at one of two levels. Choose the level that matches how much you want to reuse.

- **Portfolio** — one shared rulebook. Every property follows it. Best when your properties screen the same way.
- **Property** — a rulebook for one property. Best when a property needs its own approach.

A property follows the portfolio's scoring by default. While it does, the screen tells you so, and gives you two moves:

- **Edit shared scoring in Portfolio Settings** — change the rules for every following property at once.
- **Customise for this property** — give this one property its own rules.

If a property already has its own rules, you can **Re-inherit** to drop them and follow the portfolio again.

Expect a review

Your scoring changes may go to LeaseOps before they take effect. A banner shows where they stand:

- **Pending** — we are reviewing. The changes are not live yet.
- **Rejected** — we could not approve a change. The banner explains why, so you can fix it.

Where to go next

- **Pass Score & Starting Points** — set the bar and the starting score.
- **Rules by Question** — set the points for each answer.

Pass Score & Starting Points

Two settings frame every applicant's score: the score they must reach, and the score they begin with. Set these first, then tune the per-question points.

> ? Screenshot: the outcome band (Pass score, Starting points, Tenant Screening Document).

Set the bar with Pass score

The **Pass score** is the score an applicant must reach to pass. Set it where you want the cut-off.

1. Drag the slider to your number. It moves in steps of 5, from 0 to 100.

Applicants who fall below the bar see a message. The screen previews that message under the slider, so you know what they will read.

Set the starting line with Starting points

Starting points is the score every applicant begins with. Their answers then add or take away points from there.

1. Open the **Starting points** list.
2. Choose a starting score.

A higher start is more forgiving; a lower start makes each answer count for more.

Show your work with the Tenant Screening Document

This setting appears for a single property. When you turn it **On**, applicants can download a list of the answers that can lower or fail their score. It makes your screening transparent.

- Select the toggle to turn it **On** or **Off**.
- Select **Preview document** to see the list first.

Some laws require this document. Where a law requires it, the toggle stays **On** and cannot be turned off.

Rules by Question

This is where you decide how much each answer matters. The points you set here shape every applicant's score, so it is the heart of your screening.

> ? Screenshot: the Rules by question work surface.

Narrow the list

Three chips filter the questions, so you can focus.

Chip	Shows
All questions	Every applicant question
Questions with scores	Only questions that carry points
Overridden vs master	Only questions where your points differ from the master

When you work on a single property, you can also **View all rules** on one page, or download the current list for your records.

Find the question

Questions are grouped into sections on the left. Each section shows how many questions it holds, how many are scored, and how many you overrode — so you can see coverage without opening every one.

Each question row states where it stands:

- **matches master** — your points match the master rules.
- **N overrides** — you changed the points.

- **not scored** — the question carries no points.

Set the points

1. Select a question to open its editor.
2. Read the **applicable law** shown for the question, so your points stay compliant.
3. Set the **Points** for each answer. The editor shows the master value next to yours, so you can see what you changed.
4. Select **Save**.

Make an answer an automatic fail

Some answers should end an application on their own.

1. Select **Set this answer to auto-fail**.
2. For some answers, add a limit — for example, *"More than [N] time(s) during last [N] year(s)."*
3. To undo it, select **Cancel auto-fail**.

Start over with Reset to master

If your changes are not working, return to the master defaults.

1. Select **Reset to master**.
2. Read the warning. This removes every override you made.
3. Select **Reset settings** to confirm.

The button stays greyed out while your rules already match the master, so you cannot reset by mistake.

Preferences

Preferences is where you tune one property. Every setting starts by following your portfolio, so a property works well from day one. Change only what this property needs to do differently.

> ? Screenshot: the Preferences hub.

Follow the portfolio, or go your own way

A tile with an **Inherited from portfolio settings** badge is using the shared value. Leave it to stay in step with the portfolio, or open it to give this property its own value. For how inheritance works, see Portfolio Overview.

Finish onboarding to unlock listing tiles

Some listing tiles stay locked until you finish onboarding. A locked tile shows a lock icon and reads *"Finish onboarding before editing this section here."* Open **On-Board Property** to finish. See Adding a Property.

Edit a setting

Each setting is a tile, grouped into four sections. Select a tile, make your change, and save it in the editor.

01 / General — who your applicants are.

Tile	Set
Income & Assistance	The income levels and assistance you accept

02 / Property Listing Page — what applicants see on the listing.

Tile	Set

Amenities	The amenities you show applicants
Animal Policy	Your pet rules, in your own words
Call-to-action Buttons	The labels and style of your listing buttons
On-Board Property	Photos, copy, and details for your listing
Resident Benefits	The benefits you include with a lease
Units Presentation	How your units appear on the public listing

03 / Questionnaire — how you screen and score.

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

For the scoring rules, see Rules by Question.

04 / Service Terms — your commercial terms.

Tile	Set
Advertising	Your advertising limits
Billing & Payment	Invoicing, payment schedules, and billing terms
Enrolled Units	The units listed under LeaseOps service
Lease Template	Your lease document

Messages

Messages keeps all your conversations in one place. Talk with your LeaseOps team, admins, and applicants without leaving the portal. Each conversation is a **thread**.

> ? Screenshot: the Messages inbox.

Find the right conversation

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

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

Looking for one thread? Search by name, unit, or message text.

A brand-new inbox reads *"No conversations yet."*

Start a conversation

1. Select **New message**.
2. In **Recipient**, search by name or email. You can reach an admin, an owner, or an applicant.
3. Choose the **Property** the message is about, so the thread has context.
4. Type your note and send it.

Reply and share files

1. Open a thread.
2. Type your reply in the box at the bottom.

3. To send a file, select **Attach file**.
4. Select **Send**.

An empty thread reads *"No messages yet. Start the conversation."*

Profile

Profile is where you manage your account and keep your sign-in secure. The settings sit in two groups — **General** and **Security** — and each card shows a status, such as **UP TO DATE** or **RECOMMENDED**, so you can see what needs attention.

> ? Screenshot: the Profile hub.

General

General Information

Keep your name and contact details current, so your team and LeaseOps can reach you.

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, so teammates recognise you.

1. Select **Profile Image**.
2. Add or replace your photo. Use a JPG or PNG file.

Before you add one, the card reads *"No photo yet."*

Security

Change Email

Change the address you use to sign in. LeaseOps confirms the change with you first, to keep your account safe.

1. Select **Change Email**.
2. Type your new address.
3. Open the confirmation email and follow the link to finish.

Once confirmed, your sign-in email shows a **VERIFIED** status.

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.

The card shows how many passkeys you have. With none, it reads **RECOMMENDED**. With one or more, it reads **ACTIVE**.

About & Help

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

Overview

The Owner Portal is where property owners run their rental pipeline with LeaseOps. You onboard a property, set how applicants are screened, review who applies, and keep your listing current.

Who uses it

Property owners and their teams. One owner can have several users, each with a role that sets what they can do.

What you can do

- **Onboard a property** — upload photos, copy, and details for your listing. See Adding a Property.
- **Track your portfolio** — see activity across every property. See Dashboards.
- **Screen applicants** — review and decide. See Applicants Dashboard.
- **Set your rules once** — share settings across properties. See Portfolio Overview.
- **Score applicants** — decide what a strong applicant looks like. See Overview & Inheritance.

New here?

Start with Adding a Property, then read Dashboards. For common questions, see the FAQ.

FAQ

Short answers to the questions owners ask most.

How do I add a property?

You do not build one from scratch. The LeaseOps team invites you by email, and you complete the onboarding worksheet. See Adding a Property.

Why isn't my scoring change live yet?

Scoring changes can go to LeaseOps for review. While we review, the change shows **Pending** and is not active. You get the result when we decide. See Overview & Inheritance.

Why can't I edit a listing tile in Preferences?

Some listing tiles stay locked until you finish onboarding. Open **On-Board Property** to finish. See Preferences.

I changed a setting, but one property didn't update. Why?

That property is **customized** — it uses its own value and no longer follows the portfolio. Change it on the property itself, or re-inherit to follow the portfolio again. See Portfolio Overview.

My custom resident benefit isn't on the listing. Why?

Custom benefits go to LeaseOps for review. They appear once we approve them. See Portfolio Settings.

Where do I see who applied?

Open **Applicants**. See Applicants Dashboard.

Troubleshooting

Common problems and how to fix them.

A worksheet section won't submit

- Fill every required field in the section.
- Watch the save bar. Wait until it reads **"All changes saved."**
- Then select **Submit for review**. See Adding a Property.

My property isn't live yet

- Check that every worksheet section is approved, not still **Pending approval**.
- A section we could not approve shows **Admin feedback**. Fix it and resubmit.

I can't find a setting

- Shared rules live in **Portfolio Settings**. See Portfolio Settings.
- Rules for one property live in **Preferences**. See Preferences.

An applicant's score looks wrong

- Check your points in Rules by Question.
- Check whether the property inherits or customizes scoring. See Overview & Inheritance.

Still stuck?

Message your LeaseOps team from the Dashboards or Messages.

Policies

The rules that govern how owner changes take effect.

Some changes need LeaseOps review

To keep listings accurate and compliant, certain changes go to LeaseOps before they go live:

- **Property content** — your onboarding sections are reviewed before your listing publishes.
- **Custom resident benefits** — reviewed before they show on listings.
- **Scoring changes** — may be reviewed before they take effect.

While a change is in review, it shows **Pending**. If we cannot approve it, you see **Admin feedback** with the reason, so you can fix it and resubmit.

Screening follows housing law

Applicant scoring is built to follow the housing laws that apply to your property. Some questions carry rules you cannot remove. This keeps your screening within the law.

Inheritance

Each property follows your portfolio's settings until you customize it. This keeps your properties consistent by default. See Portfolio Overview.