

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**.