

PROPERTY SET UP

A quick guide to getting started



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Properties

- Create a record for each property that you manage
- As well as the address you can store additional information against the property. There is a note field as well as the ability to attach images and documents
- Your customers, the property owners, are associated with a property



- The property name that is entered is used in all the drop down selections of properties
- It is also possible to define a property ref which could be linked to your accounting system
- The billing category determines how you will be billed for this property
- On the menu their are options to add and view attachments

Property Name	Billing Category	Ref	Address	Last Work Cl.	Added By	Added Time	Manage Owners
Maria House	Single Service 6 months	MAR001	1214 Beaumont Rd, Beaumont, ON, P1L 1W8, Canada		demouser_1	13-Oct-2023 09:36:18	Manage Owners
Muskoka Cottage Demo	Full Service	MainCottage	90 Joseph Street, Port Carling, Ontario, P0B 1J5, Canada	22-May-2024	demouser_1	22-May-2024 19:56:43	Manage Owners
Pine House	Full Service	PINE01	Pine Glen Rd, Port Carling, ON, P0B 1J5, Canada	09-May-2024	demouser_1	06-Sep-2023 11:54:02	Manage Owners
Shore Front House	Full Service	SHORE01	1081 McLeod Rd, Muskoka Lakes, ON, P0B 1J5, Canada	10-May-2024	demouser_1	05-Sep-2023 09:04:13	Manage Owners

Property Owners

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- These are your customers and they are linked to their properties
- Property owners can be set up before invites are sent to owners
- A property can have multiple owners - which they can manage
- An owner can also have multiple properties



- You can add and manage owners from the properties list or the property owners menu option
- It is possible to resend an invite and remove access to a property

Users Email	Username	Invite Sent	Registered Date	Active	Send Invite
1101 Eight House Road					
ts.martin@virgin.net		01-Mar-2024 12:19:55		Active	Send Invite
admin@ozonshab.com		11-Feb-2024 07:13:14		Active	Send Invite
*Marina House					
jamirok@gmail.com	demouser_3	12-Feb-2024 04:20:43		Active	Send Invite
demouser_3@zohocrator.com	demouser_3	17-Jan-2024 04:08:33	19-Jan-2024 10:04:05	Active	Send Invite
*Pine House					
demouser_3@zohocrator.com	demouser_3			Active	Send Invite
*Shore Front House					
demouser_3@zohocrator.com	demouser_3	21-Jan-2024 14:03:29	21-Jan-2024 14:06:01	Active	Send Invite