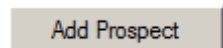




Step 1: Open Property Genie and Navigate to the **Tenant Coordinator / Prospective Tenants** screen.

First Name	Last Name	Credit Results	Employment Result	Landlord Result	Status	Submitted	Primary Property	Select
Margaret	Grand				Tenant	4/7/2011 9:26 AM	902 First Street Apt. 1	<input type="checkbox"/>
Howard	Miller				Tenant	12/12/2011 12:4...	1446 Lavender St	<input type="checkbox"/>
Lauren	Sanders				Tenant	12/15/2011 2:15...	1258 San Carlos Ave	<input type="checkbox"/>
Henry	Jones				Tenant	12/15/2011 2:18...	1425 Francis Ave	<input type="checkbox"/>
Piere	Lionel				Tenant	12/15/2011 2:19...	211 Longview Lane	<input type="checkbox"/>
Ramona	Valleze				Tenant	12/15/2011 2:22...	3223 Crofton Lane	<input type="checkbox"/>
Norman	Brown				Tenant	12/15/2011 2:23...	43 Desperado Blvd	<input type="checkbox"/>
Cindy	Green				Tenant	12/15/2011 2:24...	902 First Street Apt. 1	<input type="checkbox"/>
Martha	Schmidt				Tenant	12/15/2011 2:24...	8418 Bell Street	<input type="checkbox"/>
Francis	Grover				Tenant	12/15/2011 10:3...	8417 Bell Street	<input type="checkbox"/>
Mario	Pinto				Tenant	12/15/2011 11:3...	151 Bradshaw Highway	<input type="checkbox"/>
Jeremy	Davis				Tenant	12/16/2011 10:1...	555 Rivertown Blvd Unit 1	<input type="checkbox"/>
Ryan	Pedro				Tenant	12/19/2011 11:3...	555 Rivertown Blvd Unit 2	<input type="checkbox"/>
Derick	Sands				Former Tenant	1/10/2012 11:29...	555 Rivertown Blvd Unit 2	<input type="checkbox"/>
Simon	Kiesch				Former Tenant	1/11/2012 9:19...	902 First Street Apt. 1	<input type="checkbox"/>
Connor	Williams				Former Tenant	1/19/2012 10:04...	1425 Francis Ave	<input type="checkbox"/>

Step 2: CLICK the **Add Prospect** button in the upper-left hand corner of the screen.



Step 3: After clicking the **Add Prospect** button you will be presented with **Add a Prospect** window. Fill in all of the **required fields** (First name, last name, selected property, and move in date).

Add Prospect

Add A Prospect

* **First Name** **MI** * **Last Name**

Show Only Available

* **Primary Choice** * **Primary Rent**

* **Secondary Rent**

* **Move In Date**

* **Required Fields**



When adding a new prospect, you will need to select their “Primary Choice” property from the drop down list in the middle of the page. By default Property Genie will only display properties in the system marked “available to show”. If the property you wish to move the prospect into is not setup as “available to show” you can uncheck the box labeled **Show Only Available and a list of ALL of your active properties will show up.*

***Users are only required to select the **Secondary Property** if they plan on processing the tenant’s background check through Property Genie since part of the check compares the selected properties asking rent, vs. the prospects monthly income.*

Add Prospect

* First Name MI * Last Name

Tenant's First Name Tenant's Last Name

Show Only Available

* Primary Choice * Primary Rent

1258 San Carlos Ave - Sanford, FL - US - 5\3 1500.0000

1258 San Carlos Ave - Sanford, FL - US - 5\3

1425 Francis Ave - Orlando, FL - US - 1\1

1446 Lavender St - Deltona, FL - US - 4\2

151 Bradshaw Highway - Longwood, FL - US - 2\1

211 Longview Lane - Orlando, FL - US - 2\2

3223 Crofton Lane - Orlando, FL - US - 2\2

43 Desperado Blvd - Orlando, FL - US - 2\2

555 Rivertown Blvd Unit 1 - Orlando, FL - US - 3\3

555 Rivertown Blvd Unit 2 - Orlando, FL - US - 3\2

8417 Bell Street - Orlando, FL - US - 2\2

8418 Bell Street - Longwood, FL - US - 5\2

902 First Street Apt. 1 - Orlando, FL - US - 1\1

Secondary Rent

\$1,500.00

Step 4: This will open up the new **Prospect Application Record**

Step 5: CLICK the **Edit Record** button in the lower right hand corner

Property Genie for Magical Management Company - [Prospects]

Tenant Coordinator Property Manager Owner Coordinator Accounting System Settings Reminders Help

Property Genie™

Select a prospect Pending ON 17/19/2012 BY Property Genie

Tenant Last Name, Tenant First Show All

Prospective Tenants

Available Properties

Properties

Showing Schedule

Tenants

Keys Checkout

Vendors

Property Reviews

Receive Rent

Link Scan Documents

First Name MI Last Name

Tenant First Name Tenant Last Name

SS# VISA #

US Citizen

(numbers only)

Date of Birth DL State Driver's License #

Heard about us from:

Accounting Journal Deleted Transactions

Transaction	Posted By	Type	Debit	Credit	Reference

Unpaid Charges \$0.00

Available Credit \$0.00

Credit Balance: \$0.00

Charges

Log Out - Logged On As: Property Genie



Step 6: Now that you are able to EDIT the Prospect's Application fill in the Required Fields.

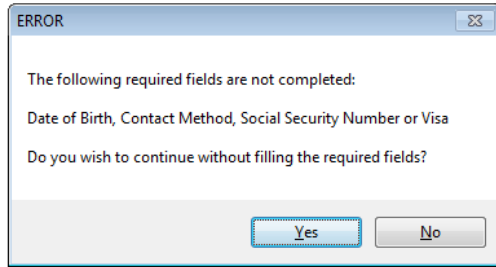
**Note there are four required fields:*

1. Social Security Number
2. Date of Birth
3. Driver's License State
4. a SELECTION from the Preferred Contact drop down list are all

***If you choose not keep any of this information on file Property Genie recommends that you fill these fields in with data that you know to be false (ie. No SSN= 000-00-0000, no d.o.b. = 1/1/1900, etc.)*

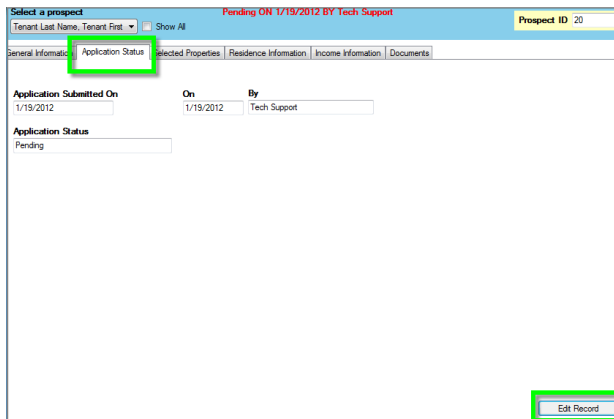
****Please note that if you submit known false information through the Property Genie background check partners they will return an invalid or failed background checks. Users should only change the information to known false data AFTER the background check is completed.*

Step 7: Once you have filled out the Required Fields, click the **Save Record** button in the lower right hand corner of the screen. If you have not filled in the required fields you will receive the following error:



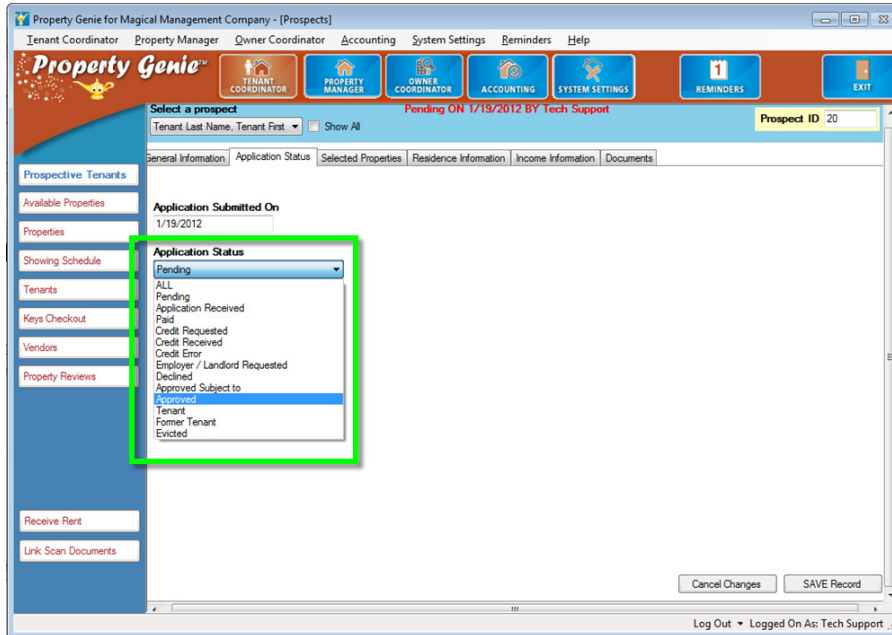
*If you are going to process a background check for this prospect then you will need to fill in as much data you have from the tenant in the **RESIDENT INFORMATION** and **INCOME INFORMATION** tabs of the prospect record. Any data you have about your prospect is important to keep on file and Property Genie recommends you retain all of the data they provide.*

Step 8: After **SAVING** the record **NAVIGATE** to the next tab of the prospect record. Once in the **Application Status** tab, click the **Edit Record** button in the lower right hand corner of the screen.



Step 9: After **CLICKING** the **Edit Record** button you can select a new **Application Status** for the Prospects.

At this point you are ready to process a background check through your account with one of the Property Genie background check partners. You will need to refer to the instructions for [How To Process A Background Check through Property Genie](#) as that process deviates from here.



Step 10: Please select “**Approved**” from the drop down list on the right hand side. Then select the **Property** for which they are **approved for** from the dropdown that appears in the middle of the screen. Then CLICK the **SAVE Record** button in the lower right hand corner of the window.



Property Genie for Magical Management Company - [Prospects]

Tenant Coordinator Property Manager Owner Coordinator Accounting System Settings Reminders Help

Property Genie™

SELECT A PROSPECT Pending ON 1/19/2012 BY Tech Support Prospect ID 20

Tenant Last Name, Tenant First Show All

General Information Application Status Selected Properties Residence Information Income Information Documents

Prospective Tenants Available Properties Properties Showing Schedule Tenants Keys Checkout Vendors Property Reviews

Application Submitted On 1/19/2012

Application Status Approved Approved For FL - US, Sanford - 1258 San Carlos Ave 5/3

Cancel Changes SAVE Record

Log Out Logged On As: Tech Support

****For LEASES with MULTIPLE TENANTS, REPEAT STEPS 1-10 until all of the Tenants records have been created and Approved for the Property.***

Step 11: Once all of the **Tenants** have been **Approved** for their selected property, NAVIGATE to the **Lease** tab of the **Property Profile**.

From the Prospect Application Screen you can use the "Go to Property" button to open the record for the selected Property.

General Information Application Status Selected Properties Residence Information Income Information Documents

Application Submitted On 1/19/2012 On 1/19/2012 By Tech Support

Application Status Approved Approved For FL - US, Sanford - 1258 San Carlos Ave 5/3

Approved Letter

Go To Property

Step 12: Once on the **Property Record**, navigate to the **Lease** tab.

Step 13: In the **Lease** tab, DOUBLE-CLICK on the lease you wish to enter.

Property Genie™



Property Genie for Magical Management Company - [Properties]

Tenant Coordinator | Property Manager | Owner Coordinator | Accounting | System Settings | Reminders | Help

Property Genie™

TENANT COORDINATOR | PROPERTY MANAGER | OWNER COORDINATOR | ACCOUNTING | SYSTEM SETTINGS | REMINDERS | EXIT

Select a property: 1258 San Carlos Ave | See All | Property ID: 10

Street Address: 1258 San Carlos Ave | Unit/Suite: | City: Sanford | County: | State: FL - US | Zip: 32771 | Managed Since: 12/15/2011

Property Information | Reviews | Tenants | Owner | Documents | **Lease** | Work Orders | Amenities | Warranty | Utilities | Marketing | Security Deposit

Add New Lease | Move Lease | Show: All Leases | Current Lease(s)

Lease Name	Legal Names	Start Date	End Date	Rent	Status	AutoRenew
Original Tenant's Name on Lease	Original Tenant's Name on Lease	2/15/2011	2/29/2012	\$1,250.00	Current	<input type="checkbox"/>

Double Click on the Lease you wish to enter

Accounting Journal | Recurring Payments | Recurring Checks | Deleted Transactions | Preview Statement | Preview Journal

Transaction Date	Posted By	Type	Debit	Credit	Reference
2/15/2011	Tech Support	Security Deposit	\$1,250.00		Security Deposit
2/15/2011	Tech Support	Check		\$1,250.00	Check 225
2/15/2011	Tech Support	Check		\$1,250.00	Deposit for: Security Deposit
2/15/2011	Tech Support	Cashiers Check		\$1,823.77	Cashiers Check 4151
3/29/2011	Tech Support	Check - Personal		\$1,250.00	Check - Personal 4455
4/1/2011	Tech Support	Rent	\$1,250.00		Rent
4/5/2011	Tech Support	Keys	\$25.00		House Keykeyd By Owner
4/5/2011	Tech Support	Cash		\$25.00	Cash for new keys
4/22/2011	Tech Support	Check - Personal		\$12,250.00	Check - Personal 4456
5/1/2011	Tech Support	Rent	\$1,250.00		Rent

Charges | Payments | Deposits | \$1,250.00 | Record NSF | Print Receipt | Money Transfer

Log Out | Logged On As: Tech Support

Step 14: From the Lease Details window, click on the TENANTS tab.

Lease Details

Lease Details

General | **Tenants** | Add Fees | Move Out

*Lease Name: Original Tenant's Name on Lease | *Start Date: 2/15/2011 | *End Date: 2/29/2012

*Rent: \$1,250.00 | Sec. Deposit: \$1,250.00 | Prorate Rent: \$573.77 | Prorate Period: 14 | Min. Term (Days): 12 | Security Refund Days: 15 | Security Claim Days: 30

No Personal Checks due to NSF | Lease Status: Current | Scheduled Lease Signing: 02/01/2011 - 02:15 F | Late Fee Schedule: \$25 late fee | Custom Late Notice: | Renew Automatically | Increase Rent By: \$ 0.00 And/Or 0.000 % | Convert to Monthly | Increase Rent By: \$ 0 And/Or 0 % | Print New Lease on Renewal

Pets Approved | Pets Description: | Terminate on Sale | Terminate on Sale Days: 0 | Keys Given: 0 | Remotes Given: 0 | Pool Keys Given: 0 | MailBox Keys Given: 0 | Require Full Payment

Print Lease | Renew | Close | Edit

Step 15: In the Lease Details / Tenants tab, click the EDIT RECORD button.



Lease Details

Lease Details

General | **Tenants** | Add Fees | Move Out

Original Tenant's Name
Original Tenant's Name on Lease

Legal Names
Original Tenant's Name on Lease

Informal Names
Original Tenant's Name on Lease

Other Occupants

Tenants

Name	Status	Select	
Original Tenant's Name on Lease	Tenant	<input checked="" type="checkbox"/>	<input type="button" value="Add New Tenant"/>

Special Provisions

Print Lease Renew

Close **Edit**

PropertyGenie

WARNING! Changing information after a lease has been closed will result in having to adjust posted transactions.

OK

Click **OK to Accept the message that prompts "WARNING! Changing information after a lease has been closed will result in having to adjust posted transactions."*

Step 16: Click the button labeled **Add New Tenant**

Add New Tenant

Step 17: Click the button labeled **Add New Tenant** and then click the **YES** button when the system tells you that "Adding a tenant to a closed lease can not be un-done except by moving out that tenant. Are you sure you want to add a Tenant to this Lease?"

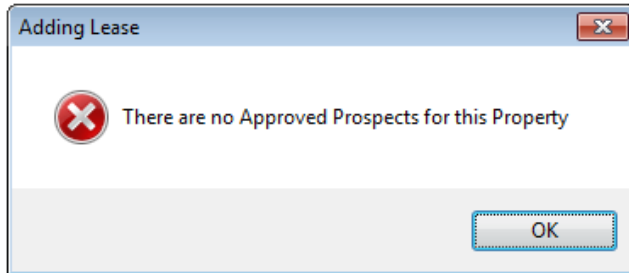
Adding Tenant

Adding a tenant to a closed lease can not be un-done except by moving out that tenant. Are you sure you want to add a Tenant to this Lease?

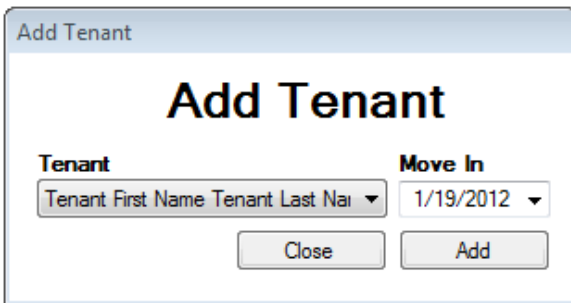
Yes No



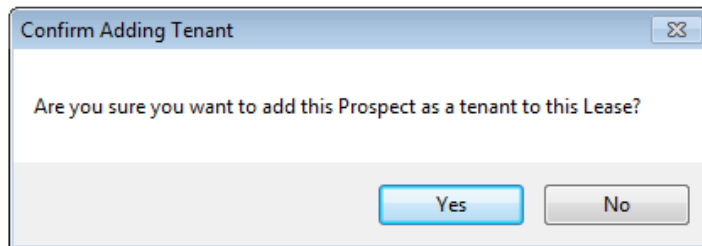
**If you did not update the new prospect to the status "Approved" (Steps 9 & 10) you will get the following error stating "There are no Approved Prospects for this Property"*



Step 18: Select the Prospect you want to move in from the **TENANT** list, and also set the **Move in** Date. Finally click the **ADD** button.



Step 19: Click the **Yes** button to confirm that "you want to add this Prospect as a tenant to this lease"



**Repeat Steps 18 & 19 until you have moved in all of the approved prospects you want as tenant on this property lease.*

Step 19: Click the **CLOSE** button when you are done adding tenants.



Add Tenant

Add Tenant

Tenant Move In

1/19/2012

Step 20: Click the **SAVE** button in the lower-right hand corner

Step 21: Click the **CLOSE** button to close the lease details screen.

Notice the Lease's **Legal Names and **Informal Names** fields update to include the new tenant's name in each.*

***The **QuickBooks Customer Name** will not update automatically. If you wish to update this field you will also need to manually update the Customer: Job record in QuickBooks to match.*

****After clicking **SAVE** the new tenant's will show up in the **TENANT** list of the lease details.*

Lease Details

Lease Details

General Tenants Add Fees Move Out

QuickBooks Customer Name
Original Tenant's Name on Lease

Legal Names
Original Tenant's Name on Lease, Tenant First Name Tenant Last Name

Informal Names
Original Tenant's Name on Lease, Tenant First Name

Other Occupants

Tenants

Name	Status	Select
Original Tenant's Name on Lease	Tenant	<input checked="" type="checkbox"/>
Tenant First Name Tenant Last Name	Tenant	<input checked="" type="checkbox"/>

Add New Tenant

Print Lease Renew

Close Edit



Lease Details

Lease Details

General | Tenants | Add Fees | Move Out

QuickBooks Customer Name
Original Tenant's Name on Lease

Legal Names
Original Tenant's Name on Lease, Tenant First Name Tenant Last Name

Informal Names
Original Tenant's Name on Lease, Tenant First Name

Other Occupants

Tenants

Name	Status	Select	
Original Tenant's Name on Lease	Tenant	<input checked="" type="checkbox"/>	<input type="button" value="Add New Tenant"/>

Special Provisions

Cancel Save

**Congratulations, you have successfully moved in a new prospect to an active lease in Property Genie*

***You will now find that the Prospect's record has been changed from "Approved" to "Tenant", and they will now show up on all of the current tenant reports in Property Genie.*

Property Genie™



Property Genie for Magical Management Company - [Properties]

Tenant Coordinator Property Manager Owner Coordinator Accounting System Settings Reminders Help

Property Genie™ TENANT COORDINATOR PROPERTY MANAGER OWNER COORDINATOR ACCOUNTING SYSTEM SETTINGS REMINDERS EXIT

Select a property 1258 San Carlos Ave See All

Street Address: 1258 San Carlos Ave Unit/Suite: City: Sanford County: State: FL - US Zip: 32771 Managed Since: 12/15/2011

Property Information Review **Tenants** Owner Documents Lease Work Orders Amenities Warranty Utilities Marketing Security Deposit

Send Email All Current By Lease Original Tenant's Name on Lease

Name	Home Phone	Work Phone	Cell Phone	Move Out	Move In	Inactive
Original Tenant's Name on Lease				1/1/1900	2/15/2011 2:15 PM	<input type="checkbox"/>
Tenant First Name Tenant Last Name	407-878-4977	888-6343643	407-555-8989	1/1/1900	1/19/2012 12:36 ...	<input type="checkbox"/>

Log Out Logged On As: Property Genie ...