

Efficiency Through Technology

Property Management Professional Series



PROPERTY 
MANAGEMENT
DIVISION

C.E. CREDIT



COMPLETE SURVEY

A survey will be sent to you within 24 hours of completing this class. Please complete this survey (which asks for your licensing information) so we can give you credit.



CAMERA MUST BE ON

You must have your camera turned on the entire class and cannot leave unless provided a break.



RECORDING IN PROGRESS

This class is being recorded and will be reviewed to ensure no one drops during the session who is requesting CE credit.

MANAGEMENT SOFTWARE

- **AppFolio 50+**
- **Buildium 50+**
- **Rentler 1+**
- **DoorLoop 1+**
- **Avail 1+**
- **Apartments.com 1+**
- **RentRedi 1+**
- **Rentec Direct 10+**

BENEFITS

SYNDICATION



TENANT SCREENING

- **Online Applications**
- **Ability to Charge a Fee**
- **Run Credit & Background Checks**

ONLINE PAYMENTS

- **No more trips to collect rent**
- **Convenience of autopay and use of credit cards**
- **More secure than cash or personal checks**

INCOME & EXPENSE TRACKING

- **Immediate and on-demand**
- **Owner/landlord accounting**

LEASE AGREEMENTS

- **Upload your lease agreement & forms**
- **Fill out forms online**
- **Electronic signatures**

MAINTENANCE & TASK MANAGEMENT

- **Receive tenant submissions online**

The screenshot displays a tenant portal dashboard with the following sections:

- Header:** Greeting "Hello, Tim!" and address "1021 W Jasmine Drive - KLM, Taylorsville, UT 84123".
- Balance Card:** "Your current balance is \$75.00" with buttons for "Make payment" and "Set up autopay".
- Rent Reporting:** A dark bar with the text "Build better credit by having monthly rent payments automatically reported to the credit bureaus." and a "Get started" button.
- Open requests:** A card with a wrench icon, the text "How can we help you?", and a "Create request" button.
- New announcements:** A card with a megaphone icon and the text "You're all caught up!".
- Lease Information:** A table listing account details.

Lease Information	
Account number	00718423
Address	1021 W Jasmine Drive - KLM Taylorsville, UT 84123 United States
Start date	10/1/24
End date	9/30/25
Rent	\$2,000.00
Prepayments	\$0.00
Deposits	\$0.00

USING TASKS IN BUILDIUM

Leaking Faucet (2872328 | 1021 W Jasmine Drive - TEST - 1) External



Equity Real Estate Property Management
to me

This message was sent from an email address that cannot accept email.

You can process the request online.

2872328 | Resident request | 1021 W Jasmine Drive - TEST - 1

Leaking Faucet

New

created by Tim Jones at 10/4/2024 1:22 PM

The bathroom faucet is leaking.

Shared with

Tim Jones, *Tenant*

(801) 916-0562 epmtraining1218@gmail.com

Process request

Equity Real Estate Property Management

Getting too many notifications? [Change notification settings](#)

Leaking Faucet

Resident request / 2872332

Summary

Work orders

STATUS:

New

PRIORITY:

Normal

DUE DATE:

m/d/yyyy

Resident request - #2872332

Created by Tim Jones at 1021 W Jasmine Drive - TEST - 1

CATEGORY: Maintenance Request

SUB-CATEGORY: General

DESCRIPTION

The faucet in the bathroom is leaking.

TENANT SCHEDULING

Permission to enter

Pets

Files

No files added yet

Updates



Tim Jones created a new task

10/4/2024 1:28 PM • Shared with tenant

STATUS

New

PRIORITY

Normal

MESSAGE

The faucet in the bathroom is leaking.

Update task

USING TASKS IN BUILDIUM

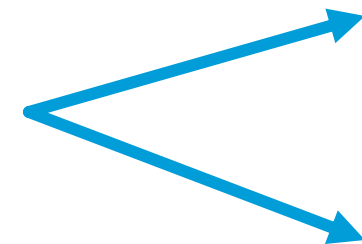
Update status, priority, and due date



Assign to vendors and collaborate with staff



Share updates with the right people



Update task

STATUS
In progress

PRIORITY
Normal

DUE DATE
m/d/yyyy

ASSIGNED TO (REQUIRED)
Select a staff member

COLLABORATORS
Select collaborators to include...

MESSAGE

+ Add attachments...

Sharing
Keep the right people informed by telling them what's changed.

- Staff**
Email staff members who opted into task notifications.
- Residents**
Send an email, push notification, and Resident Center updates.
- Rental owners**
Email the property's rental owners (PM Group).

Save Cancel

CREATE WORK ORDERS

Leaking Faucet

Resident request / 2872332

[Update task](#) ⋮ < ≡ >

[Summary](#) [Work orders](#)

STATUS: New PRIORITY: Normal DUE DATE: 🗨️ Last Updated: 10/4/2024 1:28 PM

Resident request - #2872332 [Edit](#) Created 10/4/2024 1:28 PM

Created by [Tim Jones](#) at 1021 W Jasmine Drive - TEST - 1

CATEGORY: Maintenance Request SUB-CATEGORY: General

DESCRIPTION
The faucet in the bathroom is leaking.

TENANT SCHEDULING
✓ Permission to enter
✗ Pets

Files + Add attachments

No files added yet

Updates


+ 🗨️

TJ Tim Jones created a new task
10/4/2024 1:28 PM • Shared with tenant

STATUS: New PRIORITY: Normal

MESSAGE
The faucet in the bathroom is leaking.

Location



1021 W Jasmine Drive - TEST - 1
1021 W Jasmine Drive - KLM
Taylorsville, UT 84123

[View on map](#)

Assignees

Staff Vendors

ASSIGNED TO
Assign a staff member to this task [Add](#)

COLLABORATORS
Add staff members you want to notify [Add](#)

Contacts

REQUESTED BY
TJ Tim Jones
Tenant (801) 916-0562

COMMUNICATION

ANNOUNCEMENTS:

Message entire properties via email, text message, and the Resident Center.

The screenshot displays the Buildium dashboard interface. On the left is a dark sidebar with navigation options: Dashboard, Rentals, Leasing, Accounting, Maintenance, Tasks, Communication, Reports, Analytics Hub, and Shortcuts. The main content area features a search bar and a greeting: "Good morning, Agent!".

Outstanding Balances - Rentals

Property	Amount
7102 S Brookhill Dr - EPM - 1	\$3,029.00
1021 W Jasmine Drive - TEST - 1	\$75.00

Showing 2 of 2 | View all →

Tasks

Incoming requests | Assigned to me

- Leaking Faucet
3 days ago | Resident request | 1021 W Jasmine Drive - TEST - 1
- Leaking Faucet
3 days ago | Resident request | 1021 W Jasmine Drive - TEST - 1

Showing 2 of 2 in last month | View all →

Renters Insurance

11 Total

- Insured
 - 0 MSI policy
 - 4 Third Party
- Uninsured
 - 7 Not insured

View all →

Overdue Tasks

My overdue tasks | All overdue tasks

There are no overdue tasks assigned to you.

Expiring Renters Insurance

Expired | 0 - 30 days | 31 - 60 days | 61 - 90 days

There are no expired policies.

View all →

Rental Listings

4 Total units

- Vacant Units
 - 0 unlisted
 - 0 listed
- Occupied Units
 - 4 unlisted
 - 0 listed

View all →

Rental Applications


Active applicants | New | Undecided | Approved

Recent Activity

Last 7 days — 10/1 - 10/7

COMMUNICATION

TEXT MESSAGES & EMAILS:



Tim Jones
Tenant | 1021 W Jasmine Drive - TEST - 1 [Edit](#)

[Summary](#) [Communications](#) [Files](#) [Notes](#)

Contact information [Edit](#)

EMAIL epmtraining1218@gmail.com	PHONE (801) 916-0562	ADDRESS 1021 W Jasmine Drive - KLM Taylorsville, UT 84123 Map it	FORWARDING ADDRESS --
---	---	---	--------------------------

PAPERLESS COMMUNICATION [ⓘ](#)
Not enrolled

Active lease
[1021 W Jasmine Drive - TEST - 1](#)

Fixed w/rollover
10/1/2024 - 9/30/2025

Balance:	\$75.00
Prepayments:	\$0.00
Deposits held:	\$0.00
Rent:	\$2,000.00

Payment is due on the 1st of the month. If payment isn't received, a one-time fee equal to 10% of recurring charges will be charged on the 6th of each month.

[Lease ledger](#)

Personal information [Edit](#)

DATE OF BIRTH 3/9/1996	TAXPAYER ID --
---------------------------	-------------------

COMMENTS
--

Emergency contact information [Edit](#)

n/a n/a

Renters insurance policy [ⓘ](#) [Add](#)


This tenant doesn't have a renters insurance policy

Pets [Add](#)

NAME	TYPE	WEIGHT	AGE	LICENSE NUMBER	ASSISTANCE ANIMAL
Molly	Dog	70	4	123456789	

COMMUNICATION

Biggest benefit: Leaving a paper trail!







Tim Jones
Tenant | 1021 W Jasmine Drive - TEST - 1 [Edit](#)

Summary **Communications** Files Notes

History **Scheduled (0)** Drafts (0)

(5) Emails, Mailings, Phone c... | Last 30 days | 9/7/2024 | 10/7/2024 | [Add filter option](#)

-  **AI** Agent in Training sent an email to Tim Jones
10/7/2024 10:19 AM
Re: Past Due Rent - Service of Notice
From: epmtraining1218@gmail.com
-  **AI** Agent in Training started a text conversation with Tim Jones
10/7/2024 10:10 AM
Hello, Tim! Equity Real Estate - Property Management Division would like to communicate with you via text message.
+5 more messages
-  **AI** Agent in Training sent an announcement to 1021 W Jasmine Drive - TEST
10/7/2024 10:05 AM
URGENT: Water Shut Off
Water will be temporarily shut off between 08:00 PM and 10:00 PM for repairs. We appreciate your patience!
-  **AI** System sent an email to Tim Jones
10/4/2024 1:29 PM
New Maintenance Request - "Leaking Faucet"
From: equitypmoffice@gmail.com

COMMUNICATION

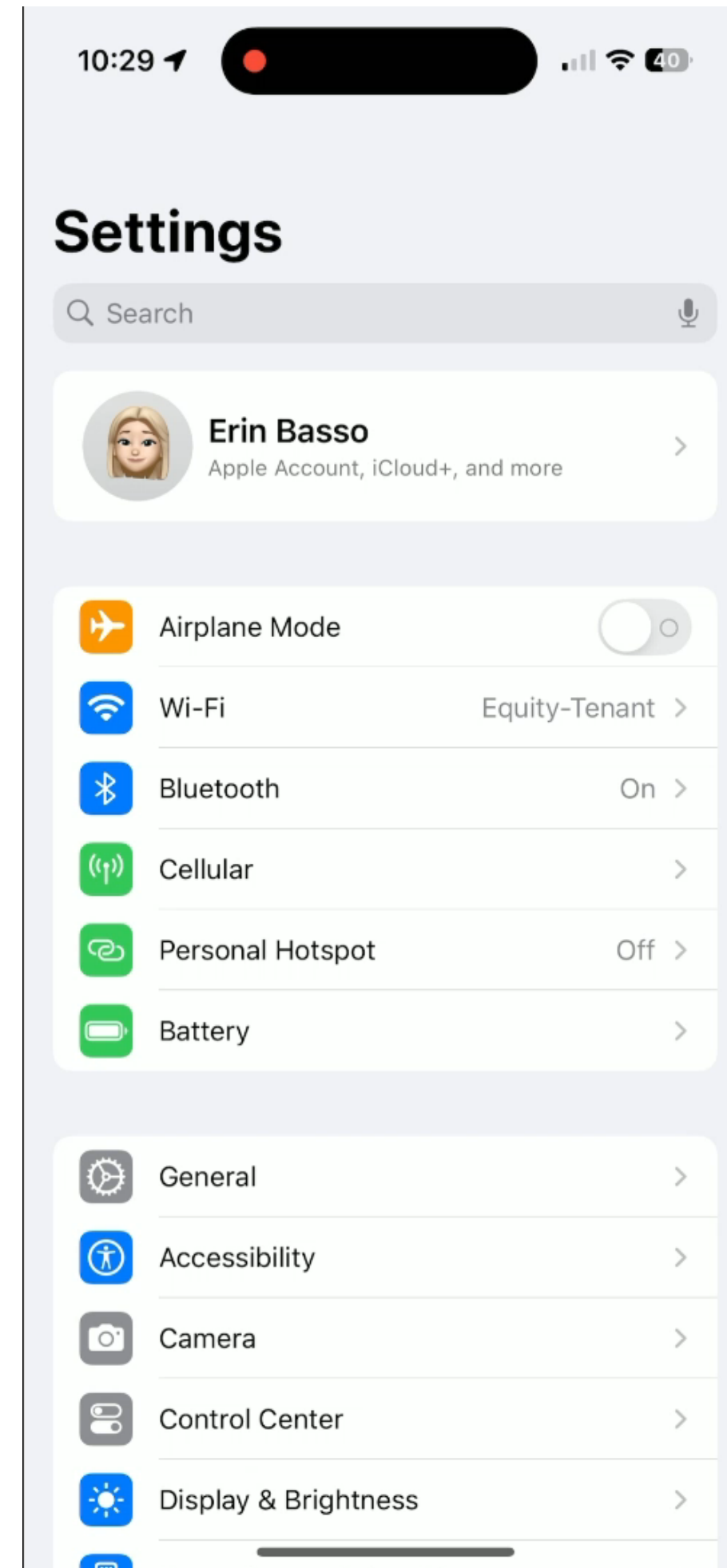
- Be consistent, regardless of how you choose to communicate.
- Be responsive.
- Be professional.
- Be aware of Fair Housing Guidelines

TEMPLATES

Useful for:

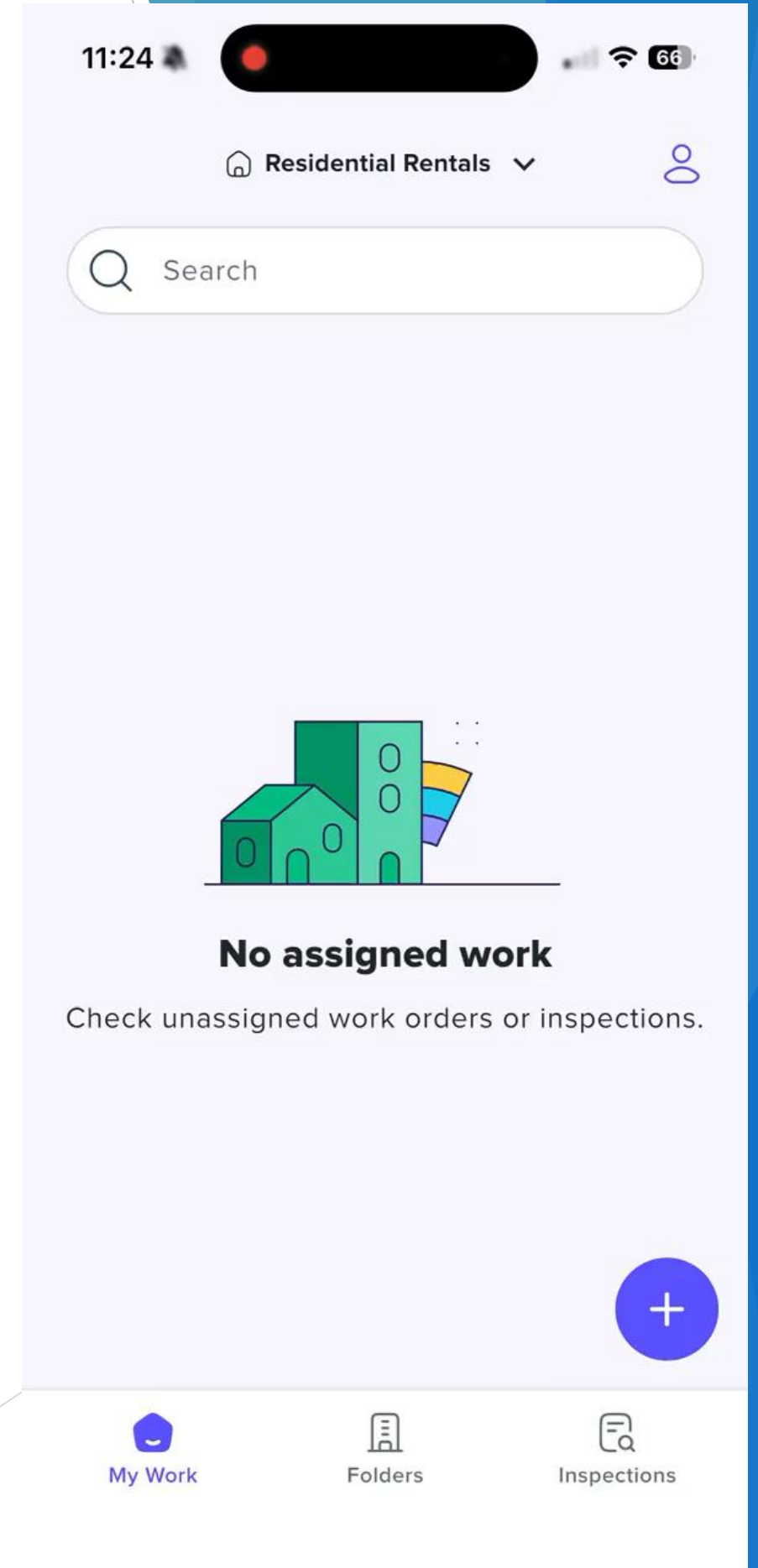
- Showing requests
- Rental criteria and applications
- Move-out requirements
- Renewals

IPHONE PREDICTIVE TEXT

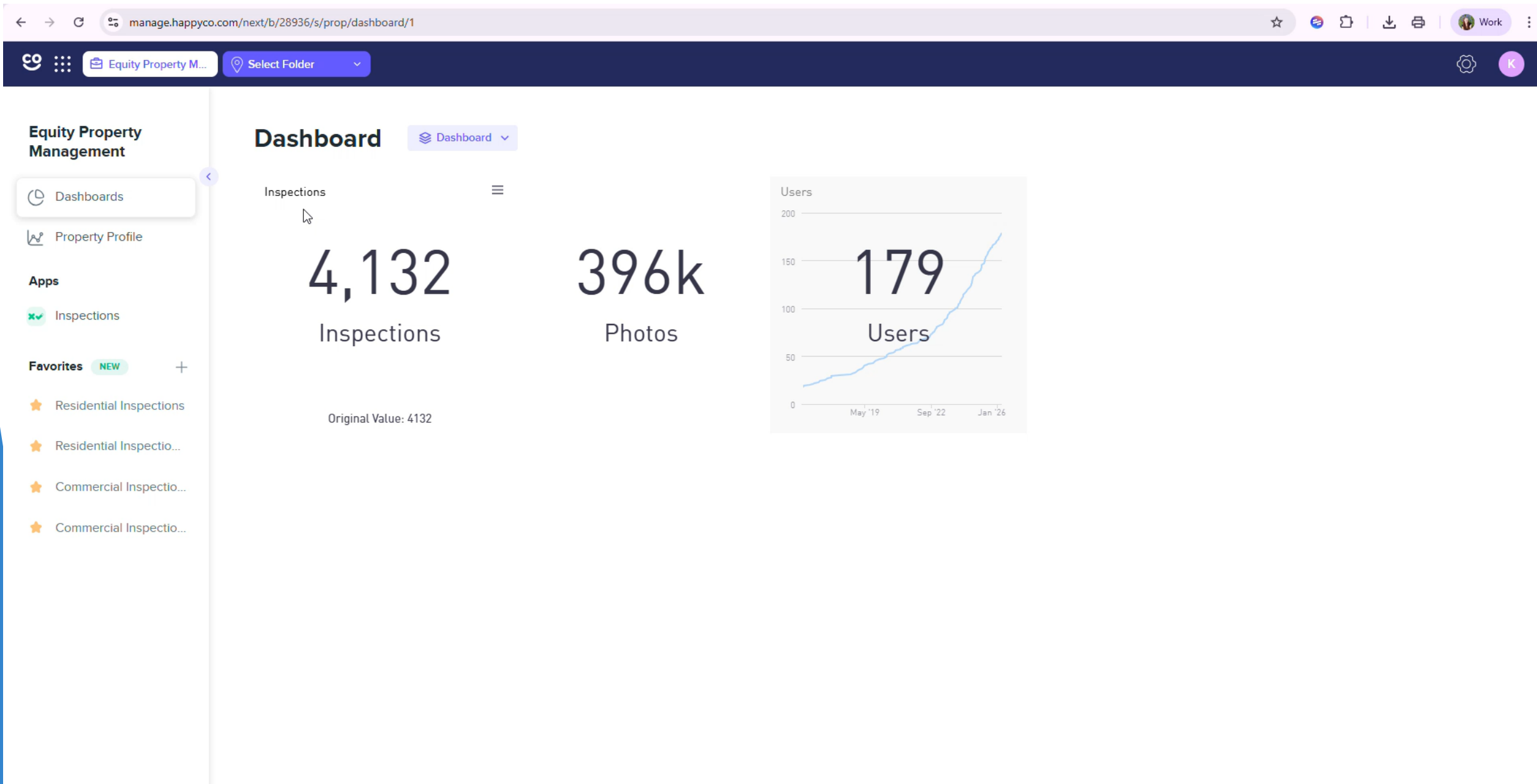


HAPPY CO - Happy Maintenance

Mobile View



Computer View



SELF-SHOWING

Rently Benefits



- More showings
- Auto vetting
- Time scheduling
- Auto confirmation
- Source of advertising

SELF-SHOWING

The process for a prospective tenant

1. Access the self showing web link from Rently.com.
2. Provide personal information and answer questions based on landlords set criteria.
3. Provide a credit card in case of vandalism, etc.
4. Receive key box code that expires in one hour.
5. Provide feedback via the automatic survey that is emailed after the showing is complete.

ADVANCED MARKETING TOOLS

**Floorplans, Video Tours, and Watermarking
Photos.**

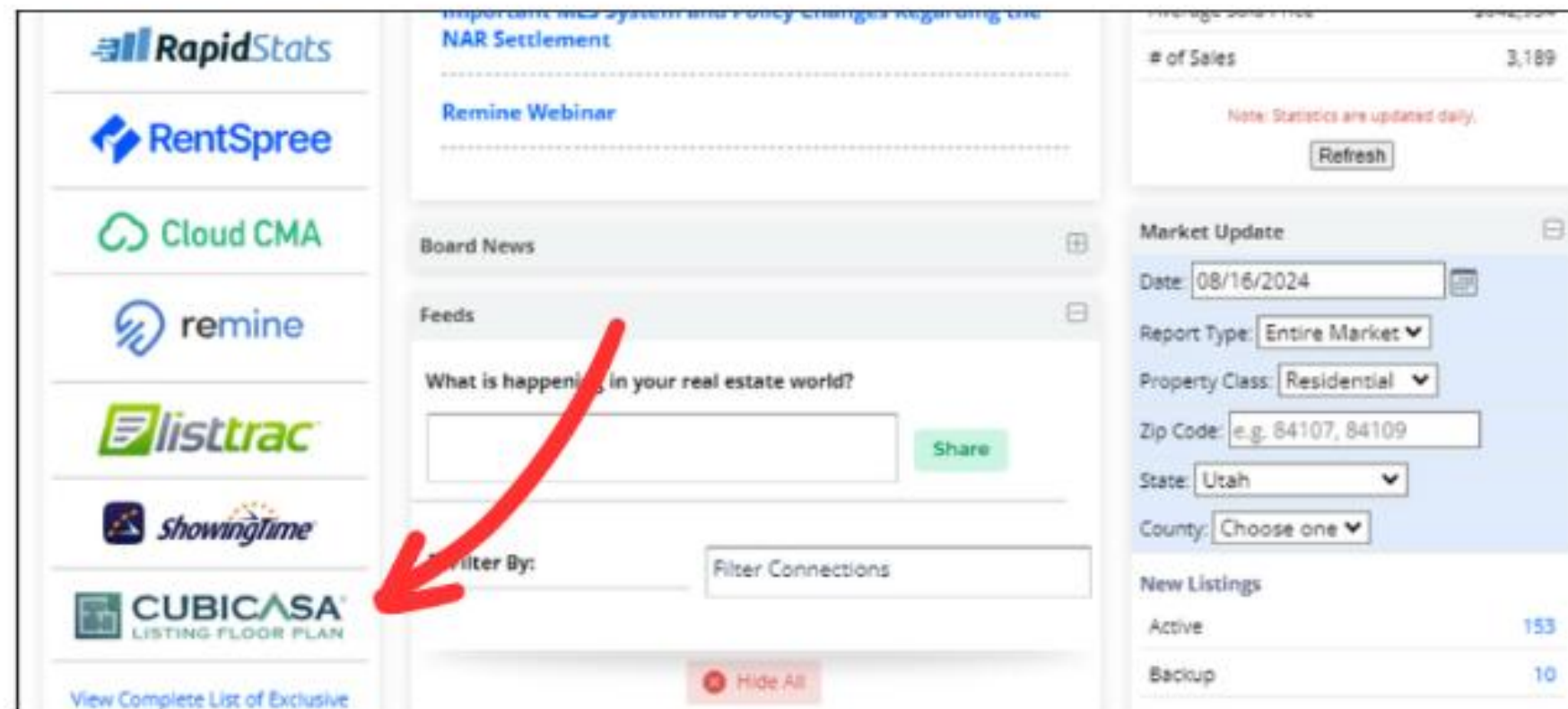
Benefits:

- **Competitive Market**
 - **Save Time**
 - **Professional**
- **Prevent Fraud/Scams**

CUBICASA

Free floor plans in .jpg or .png format

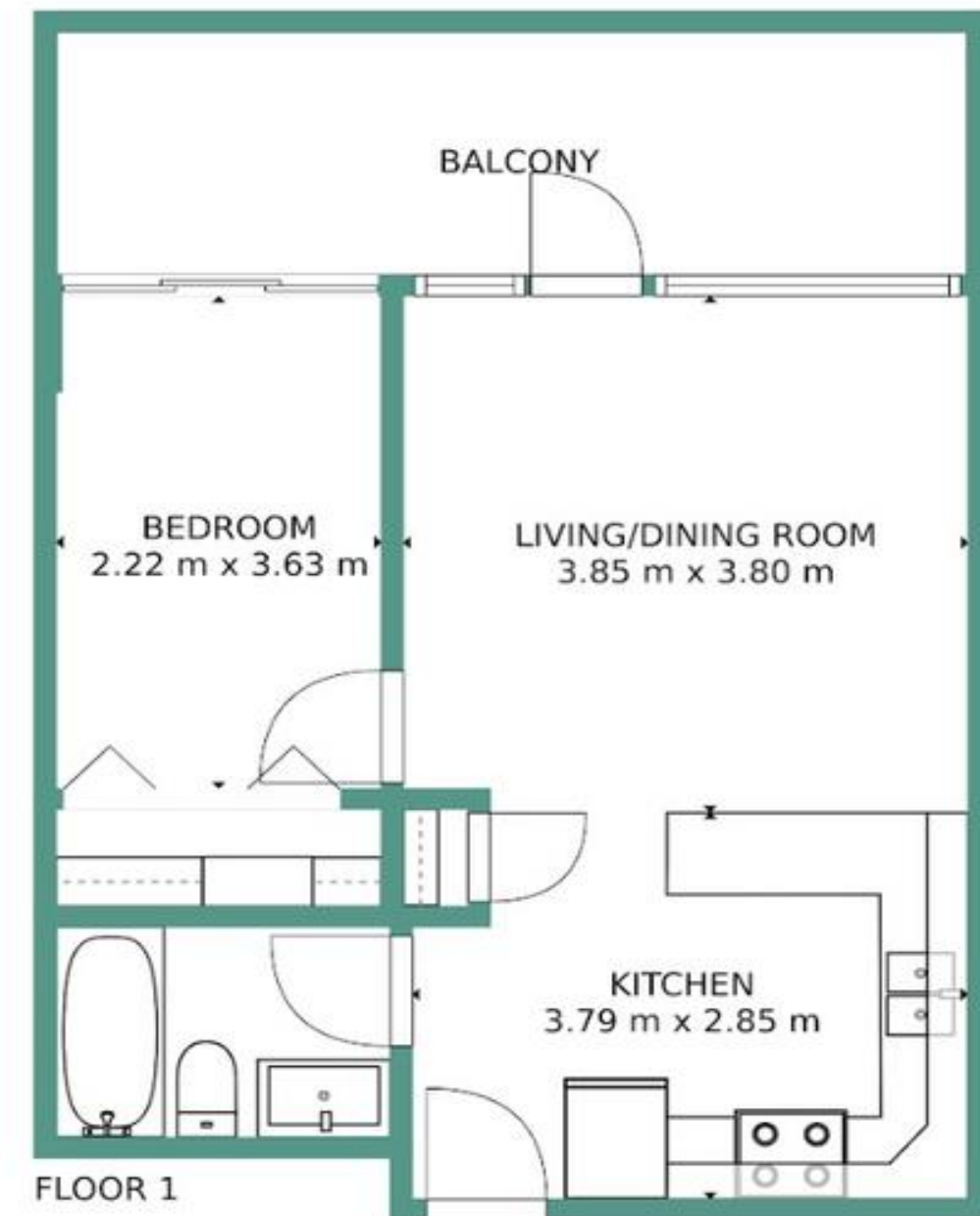
1. Log in to the MLS. On your dashboard, click on CubiCasa.



2. Create an account.

3. Download CubiCasa from the App Store or Google Play Store.

4. Watch the help playlist on CubiCasa's official YouTube channel for tutorials and tips!

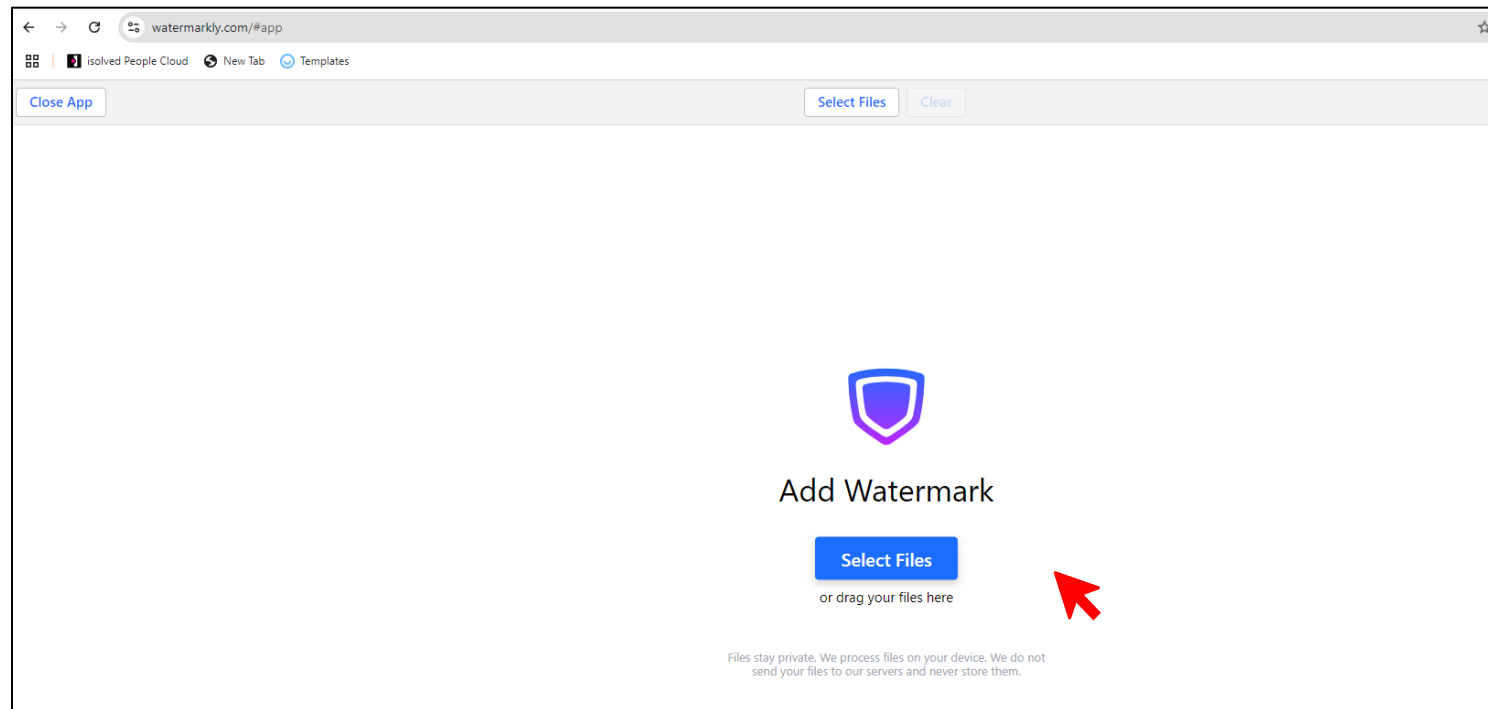


VIDEO TOUR

- Take a video walkthrough with your phone.
- Create a YouTube channel.
- <https://support.google.com/youtube/answer/1646861>
- Follow the steps to upload a video.
- Upload video link to Listings under Photos in PM software.

WATERMARKLY.COM

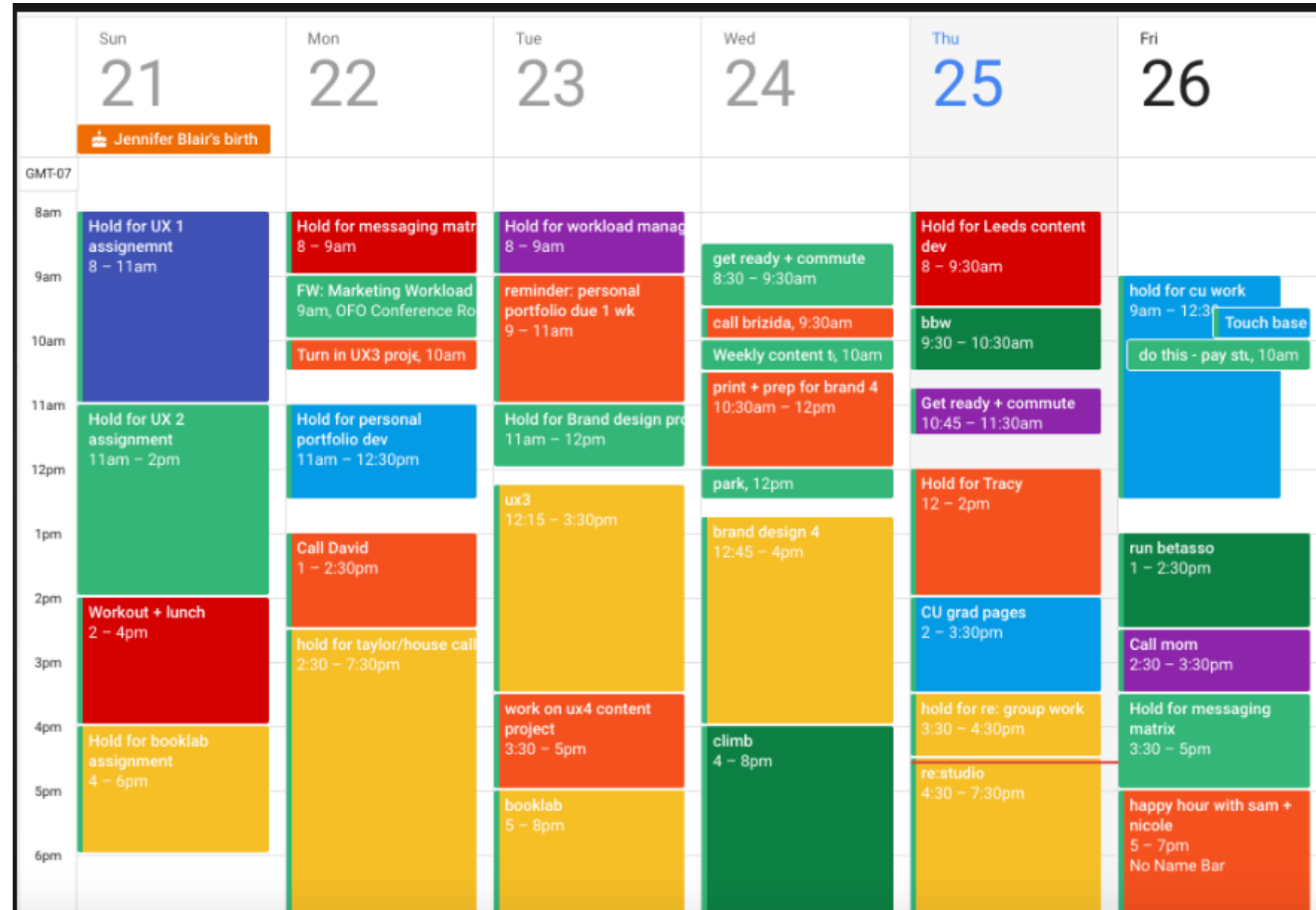
Free and easy! No account needed.



TIME MANAGEMENT

- Calendar blocking
- AI calendars
- AI Tools (ChatGPT & Claude AI)

CALENDAR BLOCKING



Google Calendar
Clickup.com

Oodo.com
Motion.com

MOTION

Calendar Projects Booking Tutorials

Today < > Oct 2024

MDT + Sun 6 Mon 7 Tue 8 Wed 9 Thu 10 Fri 11 Sat 12

Display options + Week

kristin @equitypmusa.com

Dawgs & Whiskers Letter ... 1 - 1:30 PM

+ Add task T

3 tasks past due Resolve

07 Oct MON

- Clean car 3d 6:34 AM - 7:04 AM
- Weights 8:00 AM - 9:30 AM
- Flowers/Cookies Vi... -4d 8:44 AM - 10:44 AM
- Mail Becky Shirt -2d 9:18 AM - 9:48 AM
- Roger Utilities -2d 9:30 AM - 10:00 AM
- Marquette Building - r... 1d 11:00 AM - 11:15 AM
- Bryce Canyon SD/Kish... 0d 11:15 AM - 11:45 AM
- Vivian Paradigm Marketing ... 12:00 PM - 12:30 PM
- John & Mike - IL PM Set-Up 1:00 PM - 1:30 PM
- Start Illinois State Set ... 0d 2:51 PM - 3:51 PM
- Jeanette Mohlman 0d 3:38 PM - 3:53 PM
- Exchange Co. Meeting 4:00 PM - 4:30 PM
- Aria game 5:30 PM - 7:00 PM

08 Oct TUE

- Pilates 7:30 AM - 9:15 AM

MOTION - Scheduling

The screenshot displays a calendar interface for the user 'kristin@equitypmusa.com'. The main view is a weekly calendar for October and November 2024. The calendar shows a dense schedule of tasks and events. Key events include 'Aria's Birthday!!' on Oct 28, 'Weights' on Oct 28, 'Success Blueprint' meeting on Oct 28, 'Aria Carpool' on Oct 30, 'ARM Meeting' on Oct 30, 'RHA Membership Committee' on Oct 30, 'Tyler Dr. APPT.' on Oct 30, and 'Exchange Co. Meeting' on Oct 30. The right sidebar shows a task list for 'Dawgs & Whiskers Letter ...' with a list of tasks such as 'Aria's Birthday!!', 'Weights', 'MO Confirmation of Receipt...', 'F/U Tracy adding to CRM', 'Erin - Paradigm New Agent...', 'ADA Website Requirements', 'May Unclear Balances and Update Erin portion of Manual', 'Set Up Brokerage/CSP...', 'Reminder Pay Due Tomorrow', 'Legal Cruise Outline', 'RHA Government Affairs...', 'Blankethomes.com review', 'LLC Filings - Review Chortne...', 'Tyler Dr. APPT.', and 'Exchange Co. Meeting'. The interface includes navigation tabs for 'Calendar', 'Projects', 'Booking', and 'Tutorials', and a search bar for teammates.

AI TOOLS

ChatGPT & Claude AI

- Both are FREE to use
- Any question you have can be answered
- Great for drafting emails, notices, and listings
- Can analyze files, make spreadsheets, make pictures, and so much more!
- Available on your phone and computer



ChatGPT



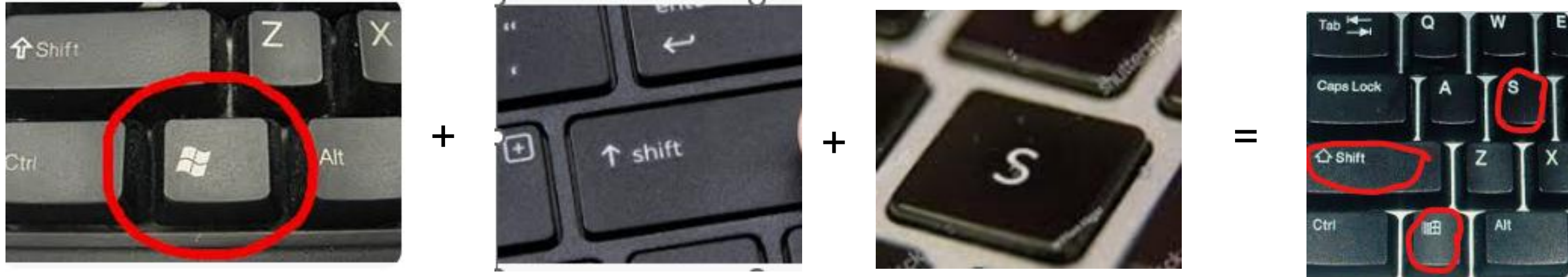
Claude

AI TOOLS - WHAT TO TRY

Try asking it to:

- Draft a late rent reminder email
- Write a property listing description
- Create a move-in/move-out checklist
- Respond to a tenant complaint professionally
- Summarize a long lease or document

SCREENSHOTS



Tenant Resident Announcement – Insurance Compliance Change

Dear Resident,

Equity Real Estate Property Management has recently partnered with **Foxen** to monitor residents' compliance with the insurance requirements outlined in your lease agreement.

As a reminder, your lease requires you to maintain a **minimum of \$100,000 in liability insurance coverage** to protect against accidental damage you may cause to the property.

ALL TENANTS MUST TAKE ACTION BY DECEMBER 1, 2025

Please review the options below and complete the action that applies to you.

Election 1 – You Have an Active Independent Insurance Policy

If you already have renter's insurance through a provider such as **MSI, State Farm, Progressive, Lemonade, or another carrier**, please

- A **minimum of \$100,000 in liability coverage**
- **Your property address** listed on the policy
- **Equity Real Estate Property Management** listed as an **Additional Interest/Interested Party**
- Notification address for policy changes listed as:
 - **Equity Real Estate Property Management**
PO Box 12367
Columbus, Ohio 43212

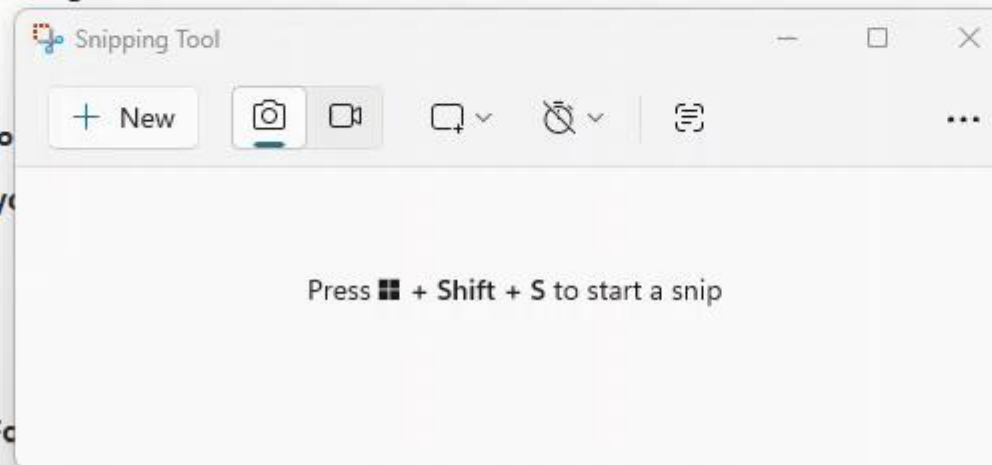
If your insurance provider offers a **notification**

Example of how this should appear on your policy

Equity Real Estate Property Management
PO Box 12367
Columbus, Ohio 43212
status@foxen.com

To Upload Your Insurance Certificate – Foxen

1. Visit www.foxen.com



New Message

Recipients

Subject

Manager

Equity Real Estate - Property Management

O: 801.545.4302

www.equitypmusa.com



SCREENSHOTS

Control V or Paste in your email, document, etc.

OR

Modify under Snipping Tool and Add more details or instructions.

Rents for Owner

Kim Leon (office@equitypmusa.com)

Rents for Owner

Lease End	Bed/Bath	Rent Cycle	Rent Start	Rent
at-will	1- /1 Bath	Monthly	10/4/2019	\$995.00
12/31/2024	1- /1 Bath	Monthly	5/27/2024	\$1050.00
11/30/2024	1- /1 Bath	Monthly	45418	\$1100.00
10/31/2024	1- /1 Bath	Monthly	4/25/2024	\$1095.00
11/30/2024	1- /1 Bath	Monthly	6/1/2024	\$1000.00
1/31/2025	1- /1 Bath	Monthly	6/24/2024	\$1000.00
				\$6240.00

Kristin Matulonis (kristin@equitypmusa.com) is signed in

Snipping Tool

+ New

Edit in Paint

Lease End	Bed/Bath	Rent Cycle	Rent Start	Rent
at-will	1- /1 Bath	Monthly	10/4/2019	\$995.00
12/31/2024	1- /1 Bath	Monthly	5/27/2024	\$1050.00
11/30/2024	1- /1 Bath	Monthly	45418	\$1100.00
10/31/2024	1- /1 Bath	Monthly	4/25/2024	\$1095.00
11/30/2024	1- /1 Bath	Monthly	6/1/2024	\$1000.00
1/31/2025	1- /1 Bath	Monthly	6/24/2024	\$1000.00
				\$6240.00

SCREENSHOTS - VIDEOS



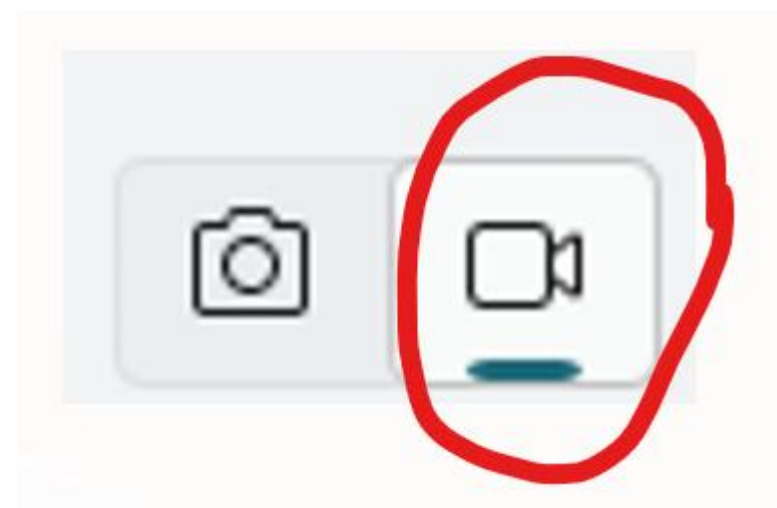
+



+



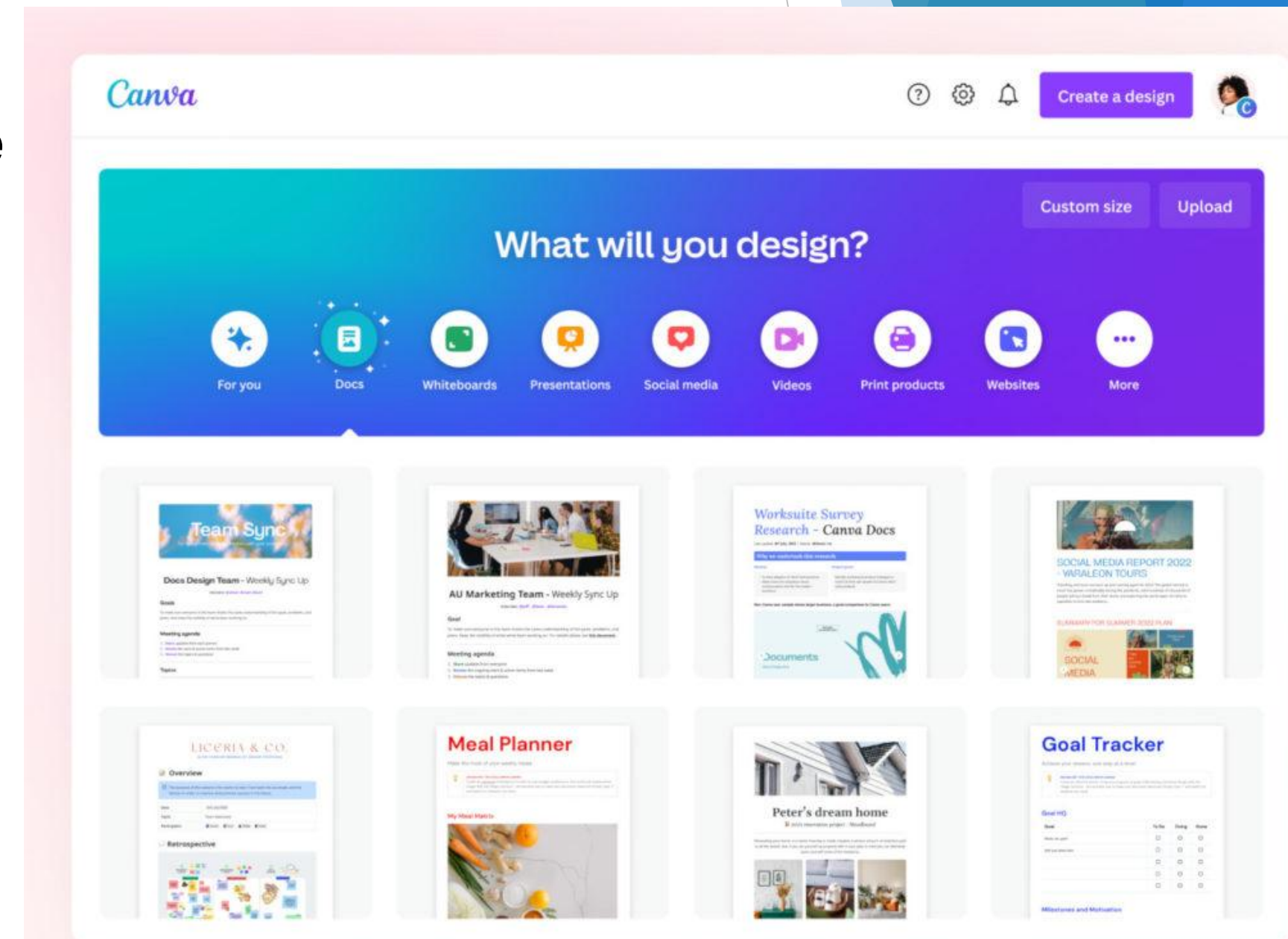
=



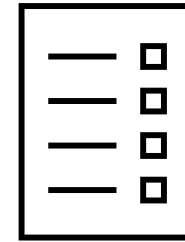
CANVA

Free design tool - no skills needed!

- Create professional flyers and For Rent signs
- Design social media posts for listings
- Hundreds of free templates to customize
- canva.com (free account)




GOOGLE FORMS



Free online forms – responses go to a spreadsheet!


- Maintenance request forms
- Rental applications and screening questions
- Move-out and satisfaction surveys
- Share via link or email – works on any device
- forms.google.com

Questions Responses **2,896**

Name 

Tell us your first name or initials (such as Jack or JD). Last name is optional.

Short answer text



Location

Insert a general location that Google Maps can recognize (such as Hartford, CT OR Kan Africa). Street address is optional.

Short answer text

Weblink







Optional: if you want others to learn more about you, add a public web address, such as: <https://twitter.com/DoughertyJack> OR other social media pages.

Short answer text

- Short answer
- Paragraph
- Multiple choice
- Checkboxes
- Dropdown
- File upload
- Linear scale
- Multiple choice grid
- Checkbox grid
- Date
- Time

← Template gallery

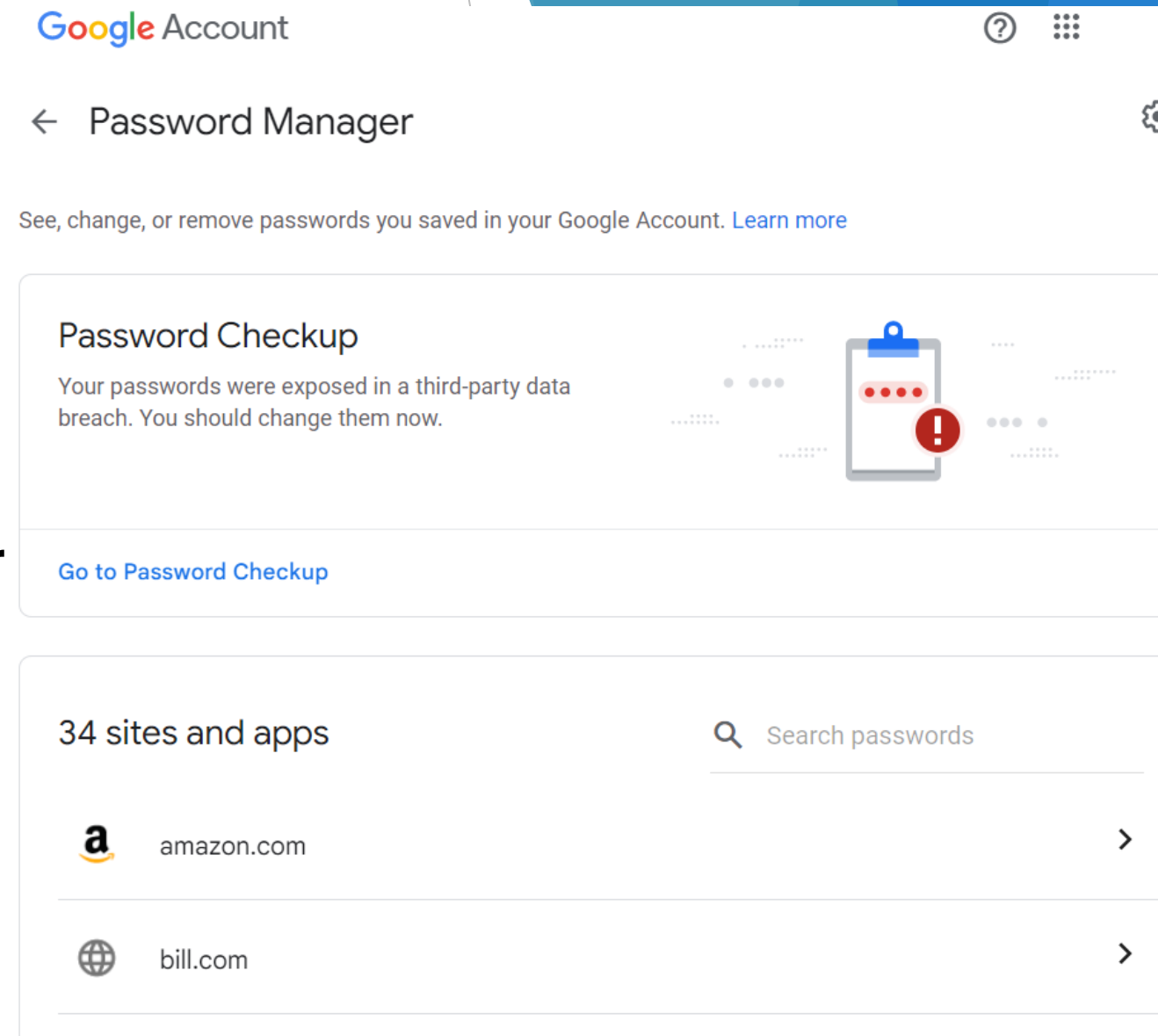
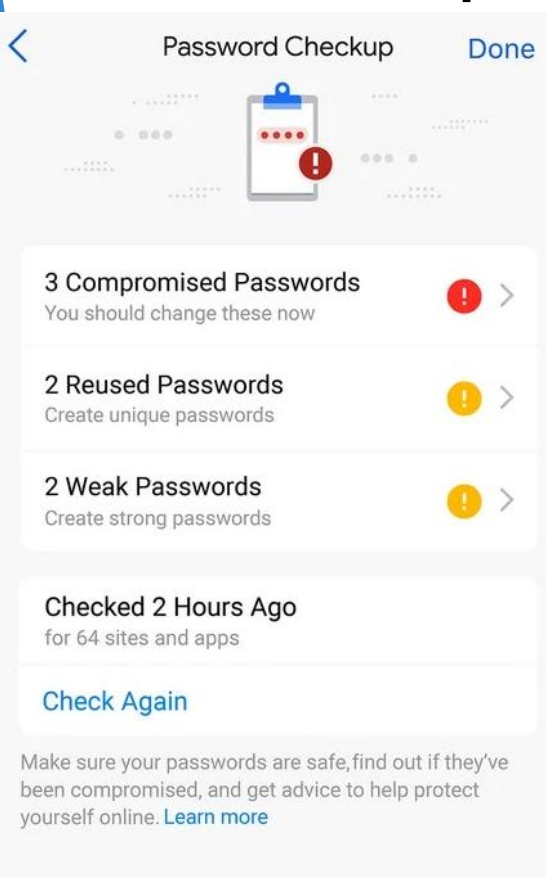
Recently used

-  Blank
-  Contact Information
-  RSVP
-  Party Invite
-  T-Shirt Sign Up
-  Event Registration

PASSWORD MANAGERS

Keep your accounts secure

- Remembers ALL your passwords for you
- Only need to remember ONE master password
- Auto-fills your login on websites and apps
- Free options: Bitwarden, Google Password Manager
- Stop using the same password everywhere!



QR CODES

Free and easy to create!

- Put on For Rent signs to link to your listing
- Add to move-in packets to link to forms
- Use on business cards to link to your website
- Tenants just point their phone camera to scan
- qr-code-generator.com (free)

QUESTIONS?

C.E. CREDIT

A survey will be sent to you within 24 hours.

You must complete the survey within 72 hours to receive CE credit.

If you do not receive the survey within 24 hours, please email manager@equitypmusa.com.

KEYWORD: INNOVATIVE

