Mi Property Portal

Onboarding Step by Step Instructions

ALL-IN-ONE PROPERTY MANAGEMENT SOFTWARE

SIGN UP

Please follow the steps below to be onboarded on Mi Property Portal:

1. Sign up at this link https://manage.mipropertyportal.com/signup/create

Skip to the next page if you have already signed up.

2. Once you signup, our backend team will review and activate your account within 24 hrs.

3. Once activated, you will receive a notification that your account is activated.

WARNING:
Please make sure to check **Junk** or **Spam** Folder or Promotions tab

PASSWORD REQUIREMENT

Password Requirements:

- At least 8 characters long
- Must start with a character
- At least one Upper case character
- At least one number
- At least one special character (example: ! @ #)

Mi Property Portal Login URL:
https://manage.mipropertyportal.com/

TIPS:
Forgot password is available in the login page

HOW TO ARTICLES

Our **knowledgebase** center is a great source of finding ***how-to*** articles.

Please visit:
https://support.mipropertyportal.com

Enter any keyword in the search box (i.e., 'owner, tenant, invoice, payment') and hit **enter** key on your keyboard. You will see all relevant articles.

TIPS:
If you have any additional questions, please send us an email at ***help@mipropertyportal.com***

UPDATE PROFILE

Make sure to update your business profile and add the recent logo of your business to keep your branding.

1.Business Profile and Logo:
https://support.mipropertyportal.com/knowledgebase/how-to-update-business-profile/

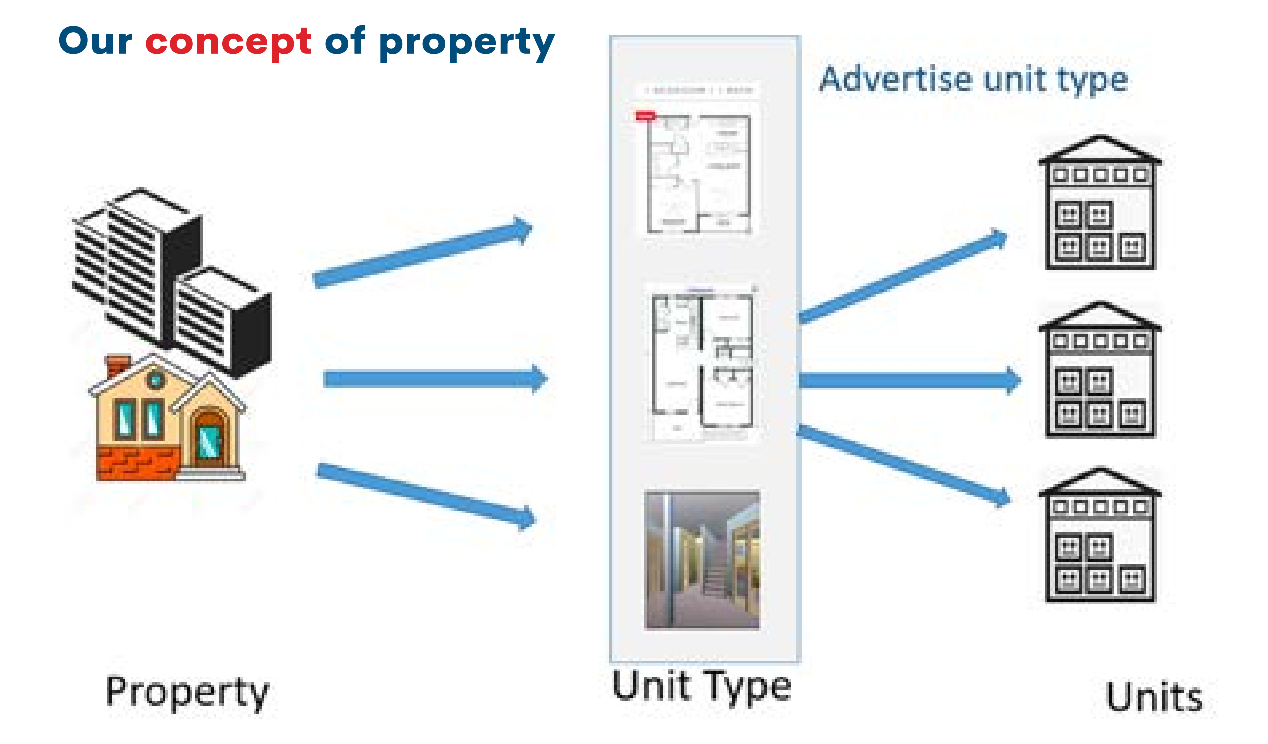
2. Personal Profile:
https://support.mipropertyportal.com/knowledgebase/how-to-update-my-profile/

3. Adding Signature:
https://support.mipropertyportal.com/knowledgebase/how-to-save-typed-in-signature/

TIPS:
A logo with the pixel between **(200px x 50px)** and **(210px x 60px)** and **white background** (optional) would be a best fit for the display

BASIC CONCEPT

The following explains the basic fundamentals of Mi property portal:



- **Property** is like a shell. It must have one or more unit
- **Unit type** is the categorization of units (i.e.: One bed, two-bedroom, and so on)

Learn more at:
https://support.mipropertyportal.com/knowledgebase/relation-between-properties-unit-type-and-unit/

NOTE:

- The unit type is for vacancy advertisement purposes ONLY
- Unit is rented to a tenant

ADMIN ACCESS

You can have as many admin as you like in the system

There are **3 types of Admin roles**:
Super Admin, Regular Admin and View Only Admin

How module permission works:
Each module have at least 3 or more associated permissions

For example:
Properties module have add, edit, delete and view permission. You can remove edit permission to block editing.

Managing Admin Access
https://support.mipropertyportal.com/knowledgebase/faq-managing-admin-access/

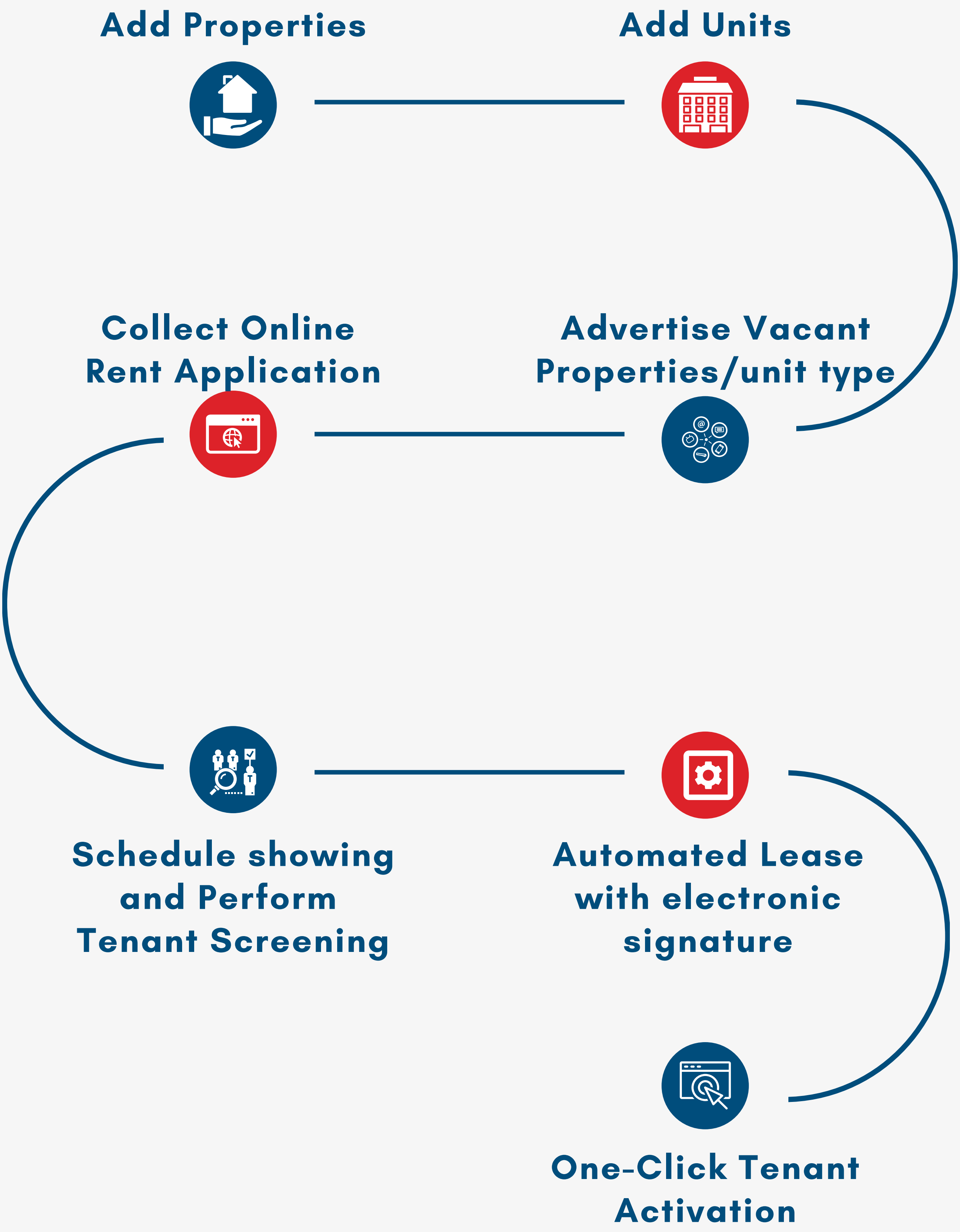
Invite Admin to join the portal
https://support.mipropertyportal.com/knowledgebase/how-to-invite-an-admin-to-join-the-portal/

Change Admin Permissions
https://support.mipropertyportal.com/knowledgebase/how-to-change-admin-permission/

Disable Admin Access
https://support.mipropertyportal.com/knowledgebase/how-to-disable-admin-access/

TIPS:
You can cutomize admin permission

TENANT ONBOARDING FLOW



PROPERTIES

There are **two ways** to add properties in the portal.

1. Manual:
https://support.mipropertyportal.com/knowledgebase/how-to-add-a-new-property/

WARNING: Set managed by property carefully. This cannot be changed once selected.

2. Bulk Upload: Please fill out the property template file available at:
https://manage.mipropertyportal.com/ClientAdmin/DashBoard/BulkTemplates

Email the file to ***help@mipropertyportal.com*** and our team will upload the properties for you.

IMPORTANT:
Please make sure to check each section and action menu in the property details page

UNIT TYPE

The unit type is used for vacancy listing purposes ONLY.

Each unit type has its own URL.

The system automatically creates unit type based on the following information:

- Number of Bedrooms
- Number of Bathrooms
- Rent Amount and
- Square Footage

1. How to add a unit type:
https://support.mipropertyportal.com/knowledgebase/how-to-add-unit-types/

2. How to edit a unit type:
https://support.mipropertyportal.com/knowledgebase/how-to-edit-a-unit-type/

NOTE:
NO bulk upload option for unit types

UNIT TYPE

The unit type detail page contains information related to the type of the unit. For example, a description of the unit, amenities information.

These information shows up in the vacancy listing page.

How to link or relink a unit to a unit type:
https://support.mipropertyportal.com/knowledgebase/how-to-link-or-relink-unit-to-a-unit-type/

How unit types get created during the bulk upload:
https://support.mipropertyportal.com/knowledgebase/how-unit-types-get-created-during-the-bulk-upload/

How to add amenities for a unit:
https://support.mipropertyportal.com/knowledgebase/how-to-add-remove-features-amenities-in-a-unit/

NOTE:
You are **NOT** charged for Unit Types

UNITS

Units are the ones that you rent out to the tenants. There are two ways to add units.

1. Manual:
https://support.mipropertyportal.com/knowledgebase/how-to-add-a-unit/

2. Bulk Upload:
Please fill out the property template file available at https://manage.mipropertyportal.com/ClientAdmin/DashBoard/BulkTemplates

Email the file to ***help@mipropertyportal.com*** and our team will upload the properties for you.

NOTE:
The system automatically creates unit type based on Number of bedroom, - Bathroom, - Rent - SqFt

UNITS

3. How to activate or deactivate a unit?
https://support.mipropertyportal.com/knowledgebase/how-to-activate-or-deactivate-a-unit/

4. Is there a charge for inactive units?
https://support.mipropertyportal.com/knowledgebase/is-there-a-charge-for-inactive-units/

5. How to change the unit type of a unit:
https://support.mipropertyportal.com/knowledgebase/how-to-change-the-unit-type-of-a-unit/

IMPORTANT:
Unit MUST be in "Active' status to be used for lease

- Unit **can not** be deactivated if there is an active tenant

TENANTS

Tenant rents or leases a house or apartments from a landlord or property manager. There are two ways to add tenants:

1. Manual:
https://support.mipropertyportal.com/knowledgebase/how-to-add-a-tenant/

2. Bulk Upload:
Please fill out the property template file available at https://manage.mipropertyportal.com/ClientAdmin/DashBoard/BulkTemplates

Email the file to ***help@mipropertyportal.com*** and our team will upload the properties for you.

TIPS:
Be cautious about **lease start** and **lease end date format** when filling up the bulk update file

OWNERS

Owners are the ones who own one or more properties. They give their property to property managers to manage. There are two ways to add owners:

1. Manual:
https://support.mipropertyportal.com/knowledgebase/how-to-add-owner/

2. Bulk Upload:
Please fill out the property template file available at https://manage.mipropertyportal.com/ClientAdmin/DashBoard/BulkTemplates

Email the file to ***help@mipropertyportal.com*** and our team will upload the properties for you.

TIPS:
Invite owners to the Owner Portal

OWNERS

3.How to invite owners to join the portal:
https://support.mipropertyportal.com/knowledgebase/how-to-invite-owner-to-join-owner-portal/

4.How to link properties to an owner profile:
https://support.mipropertyportal.com/knowledgebase/how-to-add-an-owner-link-properties-to-owner/

5. How to charge or get the money back from the owner:
https://support.mipropertyportal.com/knowledgebase/how-to-get-money-back-from-the-owner-reimbursable-bill-and-owner-invoice/

TIPS:
Owner portal is in read ONLY

VENDORS

A vendor is a company or a person who provides service to the landlord or property managers. There are two ways to add vendors:

1. Manual:
https://support.mipropertyportal.com/knowledgebase/how-to-add-a-vendor-step-by-step/

2. Bulk Upload:
Please fill out the property template file available at https://manage.mipropertyportal.com/ClientAdmin/DashBoard/BulkTemplates

Email the file to ***help@mipropertyportal.com*** and our team will upload the properties for you.

TIPS:
You can **PAY** vendors through the portal

INVOICE AND BILL SETTINGS

Auto-populate your ***Bill To*** and ***Pay To*** information when creating an invoice.

1. Invoice Settings:
https://support.mipropertyportal.com/knowledgebase/how-to-auto-populate-payable-to-information-in-the-invoice/

2. Bill Settings:
https://support.mipropertyportal.com/knowledgebase/how-to-auto-populate-bill-to-information-in-the-bill/

NOTE:
These settings have to be configured for **each property**

NOTIFICATIONS

Provide the best email to get various notifications from the portal.

3 important emails:

- **Root Email**: Business email address of the company
- **Primary Email**: Default email for all portal notification
- **BCC Email:** All communication will be Bcc to this address

This covers:

- overdue invoices
- rent due,
- tenant invoice,
- EFT payments made by the tenant
- failed payments made by tenants,
- service request,
- lease expiry,
- owner payment,
- vendor payment and
- messages from the tenant portal

Understanding various notification settings:
https://support.mipropertyportal.com/knowledgebase/understanding-notification-settings-and-features/

TIPS:
Notification can be **Globally** set

CHART OF ACCOUNT

There are more than 350 charts of accounts in the system. You can also add new accounts based on your financial and business needs.

You can download all charts of accounts in excel or CSV.

1. Add Chart of Accounts:
https://support.mipropertyportal.com/knowledgebase/how-to-add-charts-of-accounts/

2. MIPP vs Quickbooks vs Wave:
https://support.mipropertyportal.com/knowledgebase/chart-of-accounts-quicbooks-vs-wave-vs-mipp/

3. How to edit the existing Chart of Accounts?:
https://support.mipropertyportal.com/knowledgebase/how-to-edit-existing-chart-of-accounts/

NOTE:
By default, most of the system-provided charts of accounts are **not visible** unless you add them to the list.

ACCOUNTING

1.How to create a budget in MIPP?
https://support.mipropertyportal.com/knowledgebase/how-to-create-a-budget/

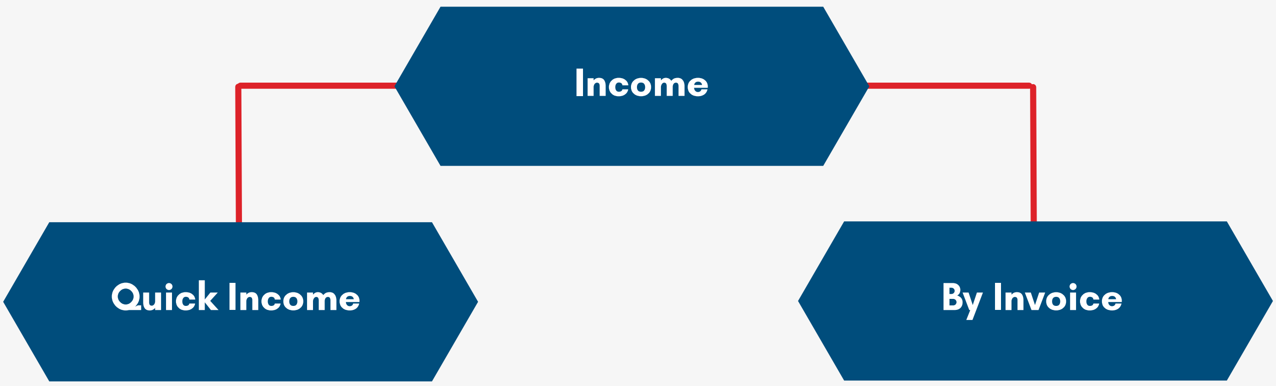
2.Account Reconciliation in MIPP
https://support.mipropertyportal.com/knowledgebase/account-reconciliation-in-mipp/

3.How to do journal transaction?
https://support.mipropertyportal.com/knowledgebase/how-to-do-journal-transaction/

NOTE:
MIPP have their own Accounting modules

INCOME LOGGING

There are ***2 ways*** to track income:



Quick income
Quickly log an income without an invoice

Invoice
Income that will be received in the future

INCOME LOGGING

Quick Income

Invoice

This income are used to quickly log income **without** an invoice. However, there are some limitations in this type of income.

1. How to add a quick income?
https://support.mipropertyportal.com/knowledgebase/how-to-add-a-quick-income/

LIMITATION:
Quick income does not have a report

INCOME LOGGING

Invoice

Invoice

Unlike Quick Income, Invoice has the ability to invoice a client today and receive payment in the future.

2. How to add invoice?

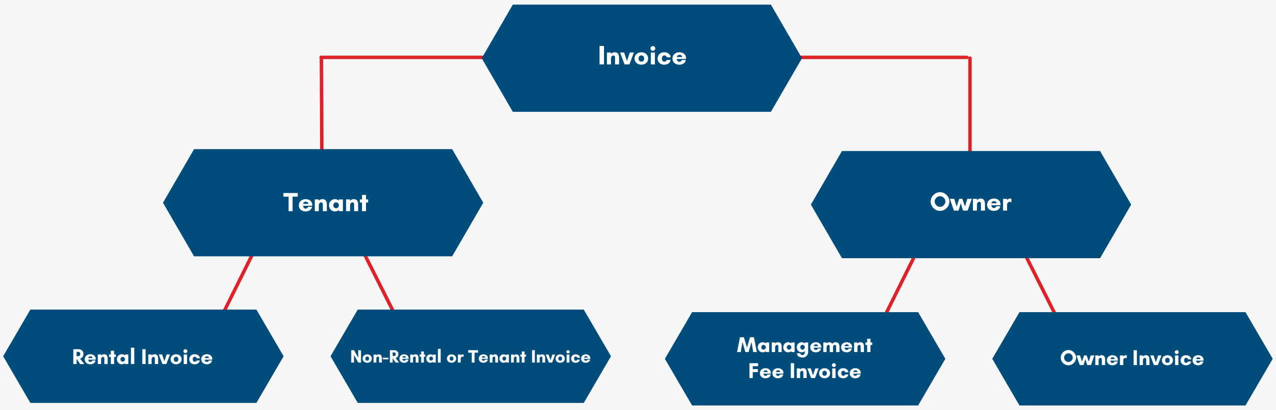
In MIPP there are 4 invoice types **Rental invoice, Tenant or Non-rental invoice, Management Fee Invoice, and Owner invoice.**

Please see the invoice types on the next page.

NOTE:
Invoice has an Aged Receivable report to track unpaid invoices

INVOICE TYPES IN MIPP

There are **4 *invoice types*** that can be created inside the portal, **Rental invoice, Tenant or Non-rental invoice, Management Fee Invoice, and Owner invoice.**



NOTE:
Use **owner invoices** when you are managing 3rd party properties

TENANT INVOICE

Rental invoice:

- Auto-generated ***10 days before*** the payment due date
- Only generates invoice if **NOT** exist
- **Automatically** created and closed when payment is processed through the portal
- Create a rental invoice (for future)

1. How to create a rental invoice?
https://support.mipropertyportal.com/knowledgebase/how-to-create-a-rental-invoice/

Tenant or Non-rental:
This type of invoice is created manually. This can be automatically created using **Recurring Invoices.**

Used when billing a tenant for fees like:
- Late Payments
- Maintenance and so on

1. How to add a tenant or non-rental invoice?
https://support.mipropertyportal.com/knowledgebase/how-to-create-a-tenant-invoice/

OWNER INVOICE

Management Fee Invoice

- Can be created **automatically** or **manually**

1.How to setup Management Fee?
https://support.mipropertyportal.com/knowledgebase/how-to-setup-management-fee/

Owner invoice

- Automatically created (settings controlled) using Recurring Invoice generation
- Can be created manually

2. How to create an owner invoice?
https://support.mipropertyportal.com/knowledgebase/how-to-create-an-owner-invoice/

TIP:
Owner invoices are generated automatically every month

RECURRING INVOICE

A recurring invoice is an invoice that is sent to the same tenant or owner at regular intervals, this also has the same invoice amount.

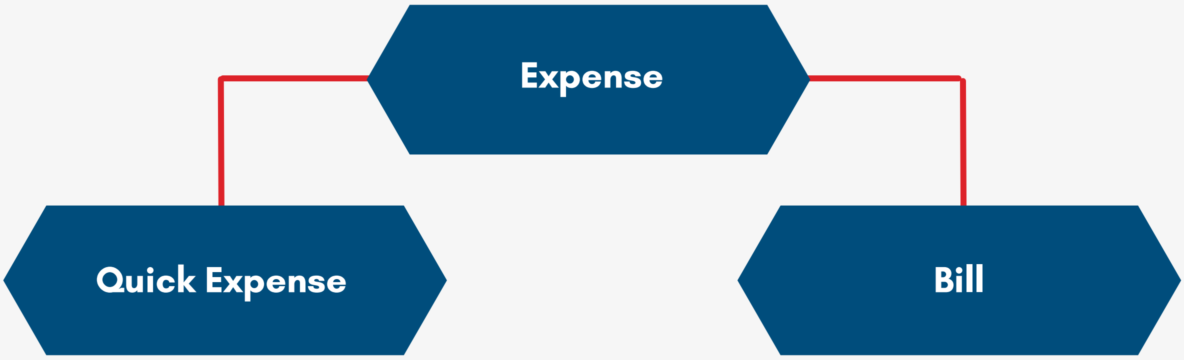
1. How to add a recurring invoice for a tenant?
https://support.mipropertyportal.com/knowledgebase/how-to-add-recurring-invoice-for-tenant/

2. How to add a recurring invoice for the owner?
https://support.mipropertyportal.com/knowledgebase/how-to-add-recurring-invoice-for-owner/

NOTE:
Recurring invoice should be manually created before it generates automatically

EXPENSE LOGGING

There are ***2 ways*** to track bills:



NOTE:
Bill **MUST** be tied to a vendor

EXPENSE LOGGING

Quick Expense

Expenses created here will **NOT** have any bill references.

1. How to add Quick Expense?
https://support.mipropertyportal.com/knowledgebase/how-to-add-quick-expense/

NOTE:
Quick Expense does not have a report

EXPENSE LOGGING

Bill

Tracking expenses and paying in the future.

1.How to create bill?
https://support.mipropertyportal.com/knowledgebase/how-to-create-a-bill/

2.How to record a bill payment?
https://support.mipropertyportal.com/knowledgebase/how-to-record-a-bill-payment/

3.How to delete a bill payment?
https://support.mipropertyportal.com/knowledgebase/how-to-delete-a-bill-payment/

NOTE:
Bill have **Aged Payable report**, this report shows how much money you owe to different vendors

ONLINE PAYMENT

Mi Property Portal has a dynamic and easy-to-use payment processing system that allows property managers to collect rent and other payments online. It **also allows you to pay vendors and owners**.

Payment Options:
- EFT (Bank to Bank) - $0.50 per transaction
- Credit Card, Master Card, and AMEX Card - 2.75% of transaction amount + $0.20

1. How to subscribe to the online payment collection?
https://support.mipropertyportal.com/knowledgebase/how-to-subscribe-for-online-payment-collection/

2. How to configure payment profile in Mi property portal?
https://support.mipropertyportal.com/knowledgebase/how-to-configure-payment-profile-in-mi-property-portal/

WARNING:
Payment Cut off time is **12:30 pm**
EFT processing time is **3 business days**

ADDING BANK ACCOUNT TO PROCESS ONLINE PAYMENT

From Admin Portal:

Tenant:
https://support.mipropertyportal.com/knowledgebase/how-to-add-tenant-bank-account/

Owner (adding bank account to pay owner using our system):
https://support.mipropertyportal.com/knowledgebase/how-to-add-owner-bank-account/

Vendor:
https://support.mipropertyportal.com/knowledgebase/how-to-save-a-vendor-bank-account/

From Tenant Portal:

Saving Tenant Bank Account:
https://support.mipropertyportal.com/knowledgebase/how-a-tenant-can-save-a-bank-profile/

NOTE:
Additional charge is applied when a payment fails due to an invalid account information

100% AUTOMATION ON RENT COLLECTION

Rent invoices are created automatically

Money is withdraw from tenant's bank account on rent due date

Rental invoice are closed automatically

Money deposit into your bank account in 3 Business days

All accounting reports are updated in real time

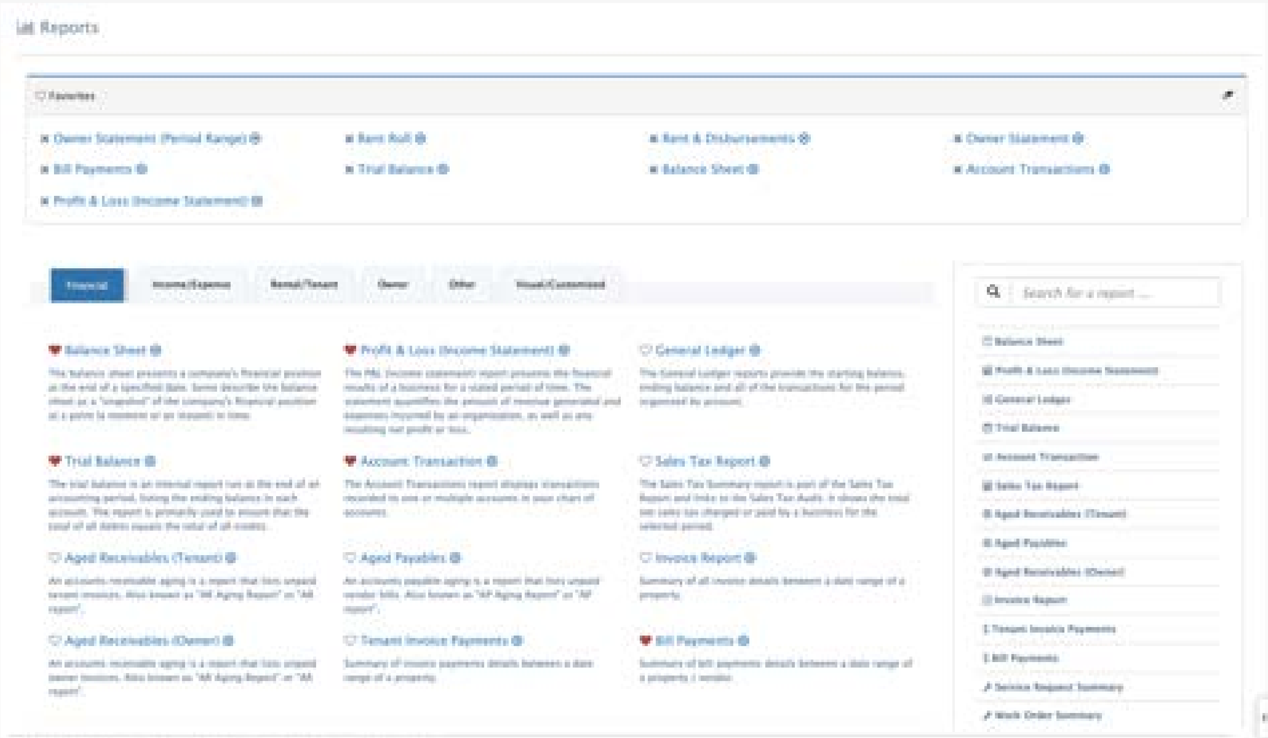
Rental receipt is available in tenant portal

TIPS:
You can pay owners and vendors from the portal

REPORT

What are the different section of Reports in MIPP:

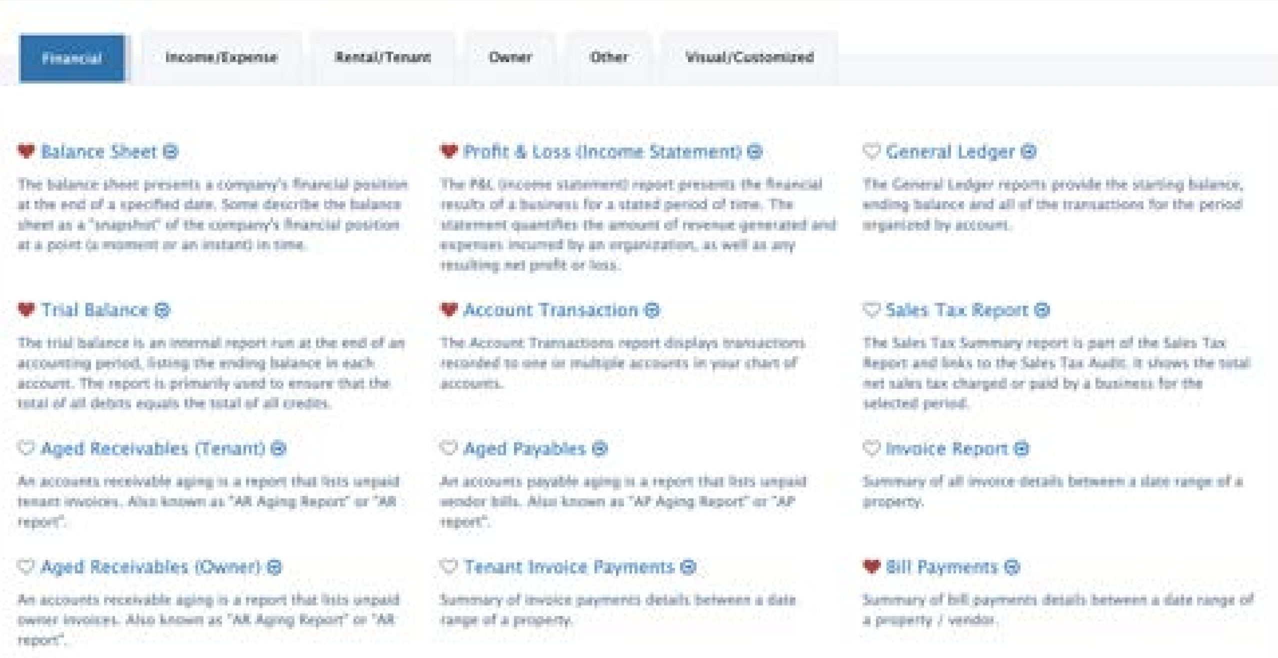
- Financial
- Income/Expense
- Rental
- Other
- Visual/Customized



TIPS:
Click the **Heart icon** to favorite a Report

REPORT

What is included in the Financial tab:

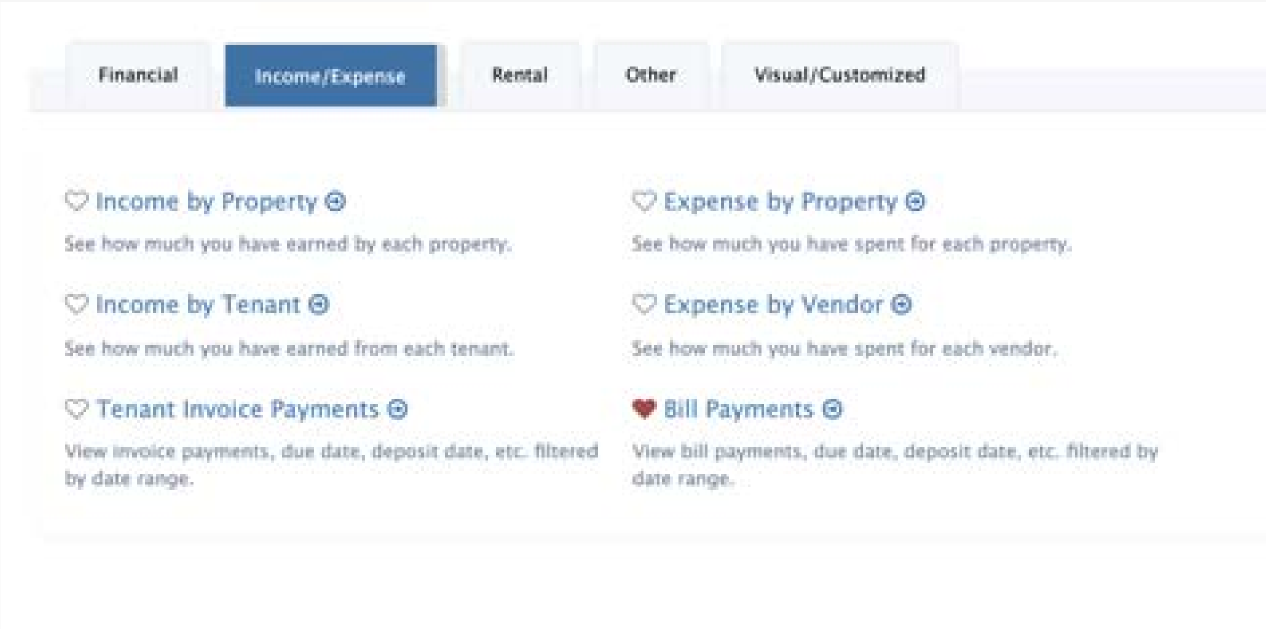


Financial:
https://support.mipropertyportal.com/knowledgebase/report-financial-definitions/

TIPS:
Search for a report from the Dashboard

REPORT

What is included in the Income/Expense tab:

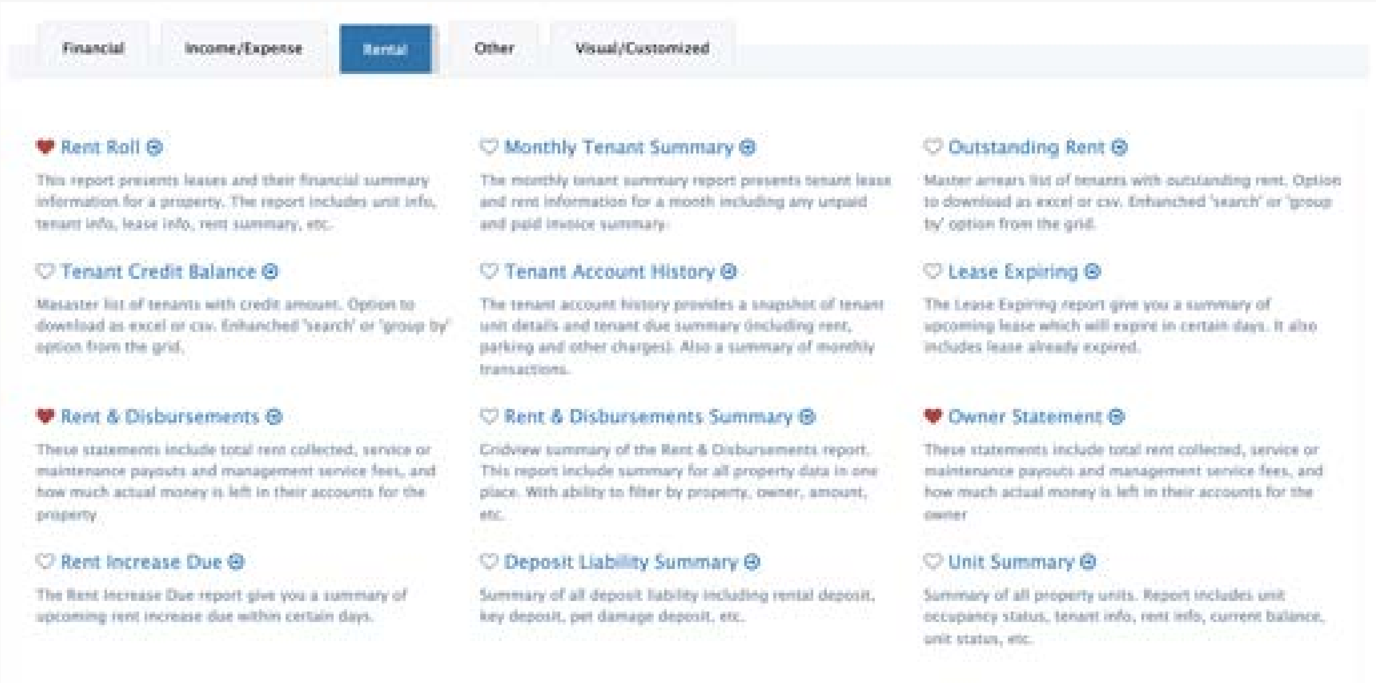


Income/Expense:
https://support.mipropertyportal.com/knowledgebase/report-income-expense-definitions/

TIPS:
New reports are added frequently

REPORT

What is included in the Rental tab:

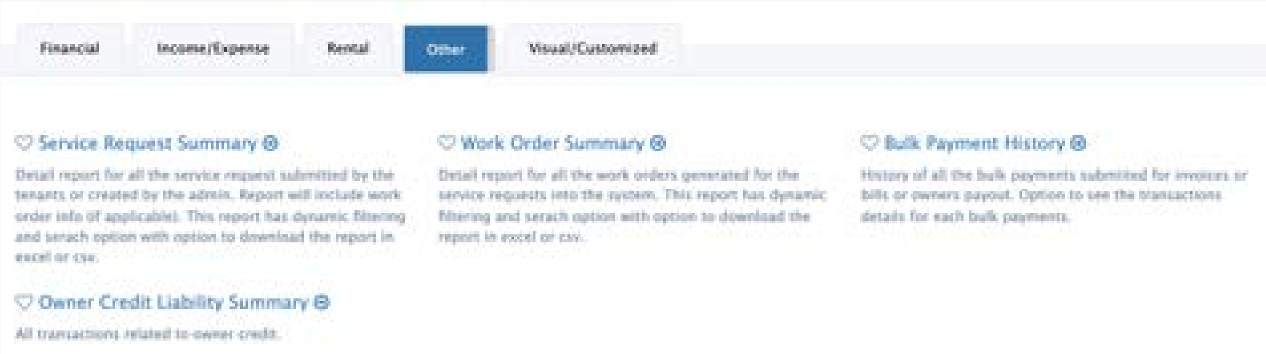


Rental:
https://support.mipropertyportal.com/knowledgebase/report-rental-definitions/

TIPS:
These reports are specific for Property Management business

REPORT

What is included in the Other tab:

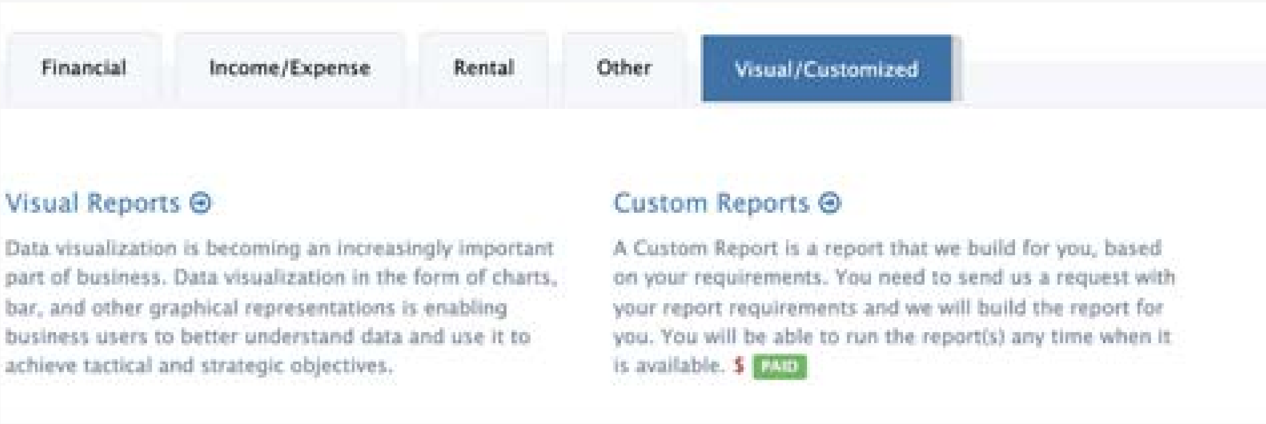


Other:
https://support.mipropertyportal.com/knowledgebase/report-other-definitions/

TIPS:
Reports are dynamic and real time

REPORT

What is included in the Visual/Customized tab:

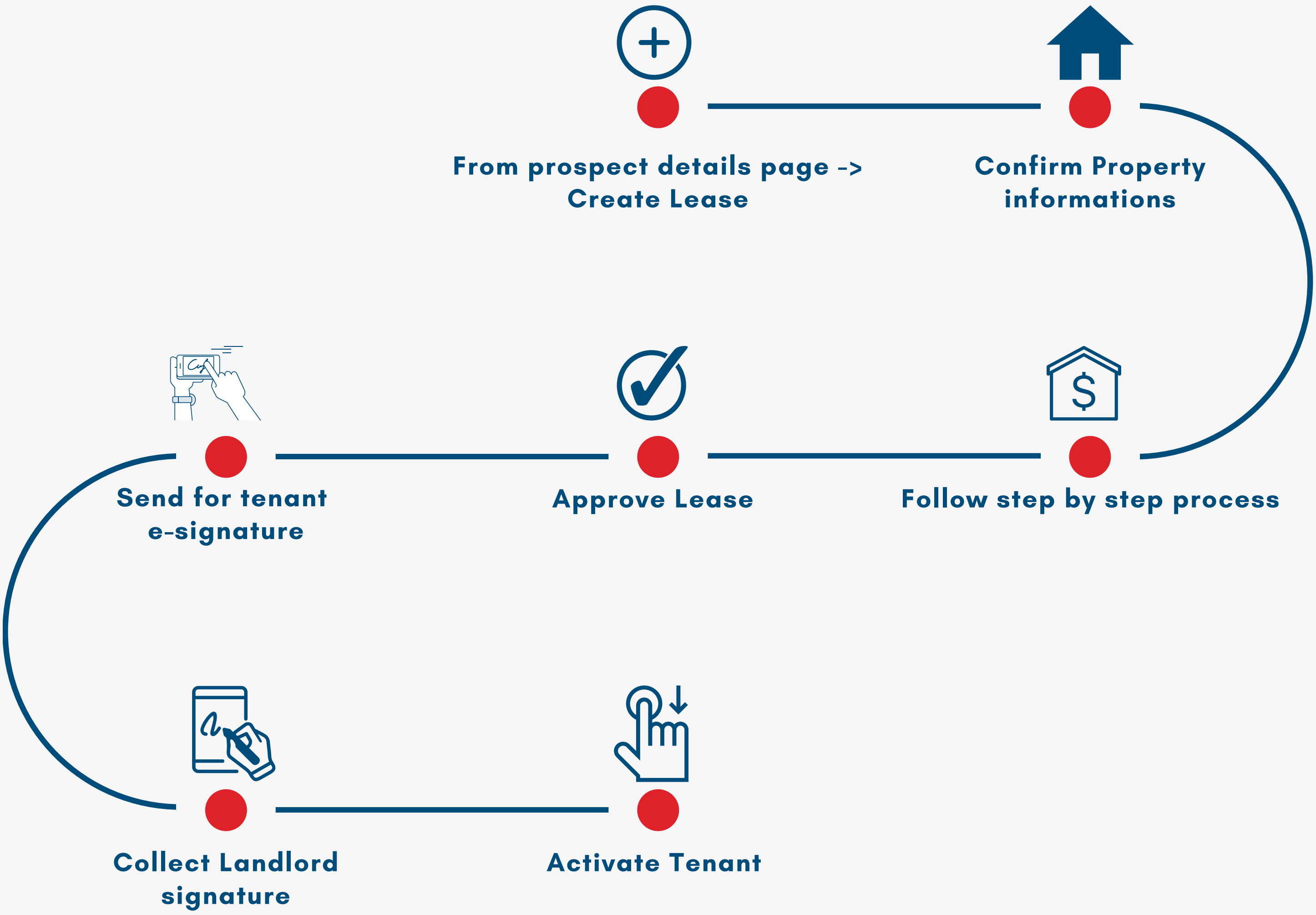


Visual/Customized:
https://support.mipropertyportal.com/knowledgebase/report-visual-customized-definitions/

TIPS:
There might be a cost involved with adding custom report

Lease Management

Lease Creation Flow



NOTE:

Electronic signature capability for System Generated Lease

No Electronic Signature capability for Upload New Lease option

System Generated Lease

System Generated Lease

- Electronic Signature Capability
- Automatically generated lease integration
- Multiple Tenant profile creation capability
- Split Rent Capability among multiple tenants
- Lease can be edited until a signature is received from at least from 1 tenant

NOTE:
Lease approval could be different from Lease creator

TENANT MANAGEMENT

1. How to move out a tenant?
https://support.mipropertyportal.com/knowledgebase/how-to-move-out-tenant/

2. How to increase tenant rent?
https://support.mipropertyportal.com/knowledgebase/how-to-increase-monthly-lawful-rent-in-the-portal/

3. How to assign a different unit to a tenant?
https://support.mipropertyportal.com/knowledgebase/how-to-change-assign-property-and-unit-for-an-existing-tenant/

TIPS:
Use the Announcement function to send bulk announcement

TENANT MANAGEMENT

How to log deposit information?
https://support.mipropertyportal.com/knowledgebase/how-to-log-last-months-rent-lmr/

How to return security deposit?
https://support.mipropertyportal.com/knowledgebase/how-to-refund-a-tenant-deposit/

How to adjust security deposit?
https://support.mipropertyportal.com/knowledgebase/how-to-adjust-last-month-rent-from-tenant-deposit/

How to return tenant credit?
https://support.mipropertyportal.com/knowledgebase/how-to-return-tenant-credit/

NOTE:
There are 3 main deposits in MIPP,
Rental, Key and Pet Deposits

TENANT MANAGEMENT

How to adjust tenant credit?
https://support.mipropertyportal.com/knowledgebase/how-to-adjust-rental-invoice-with-tenant-credit

How to send different form to tenants?
https://support.mipropertyportal.com/knowledgebase/how-to-send-different-form-to-tenants/

How to get yearly rent receipt?
https://support.mipropertyportal.com/knowledgebase/how-to-download-yearly-rent-receipt/

NOTE:
Tenant can download receipt from the Tenant Portal

ADVERTISING VACANT UNITS

MIPP allows to advertise your vacant units to be listed on their vacancy listing site for FREE.

1.How to enable or disable vacant property listing?
https://support.mipropertyportal.com/knowledgebase/how-to-enable-or-disable-vacant-property-listing/

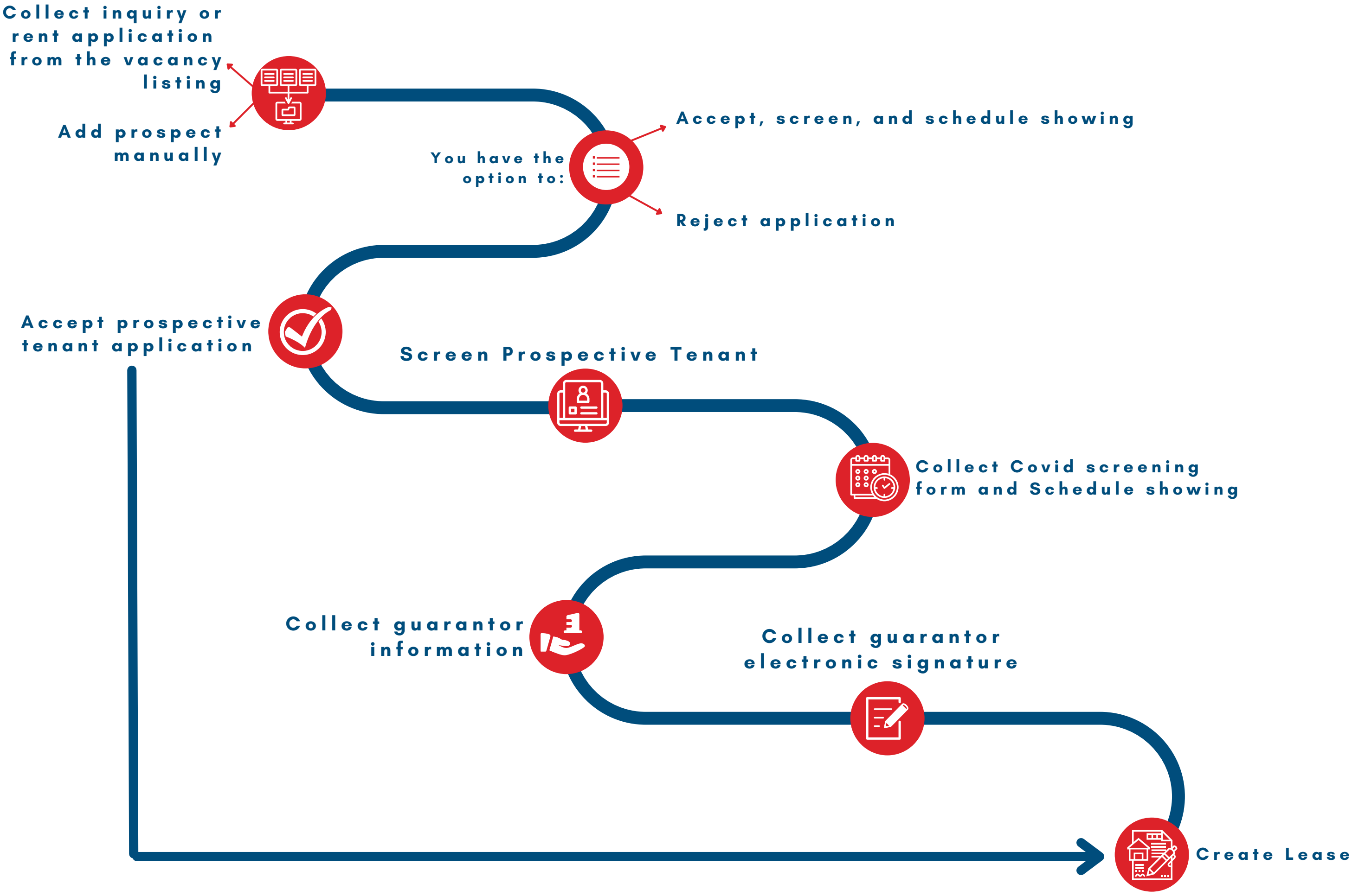
2.How to add or remove property features in the vacancy listing page?
https://support.mipropertyportal.com/knowledgebase/how-to-add-remove-property-features-in-the-vacancy-listing-page/

3.How to integrate vacancy listings in Mi Property Portal on your website?
https://support.mipropertyportal.com/knowledgebase/how-to-integrate-vacancy-listings-in-mi-property-portal-on-your-website/

NOTE:
We do not syndicate with other rental listing website
TIPS:
Vacancy listings can be easily integrated to your website

PROSPECTIVE TENANTS

Prospective Tenant Process



NOTE:
There are no special setup process.

PROSPECTIVE TENANTS

Easily add, edit and track prospective tenants inside the system.

1.How to collect rent application for a vacant property?
https://support.mipropertyportal.com/knowledgebase/how-to-collect-rent-application-for-a-vacant-property/

2.How to add prospect manually?
https://support.mipropertyportal.com/knowledgebase/how-to-add-a-prospect-manually/

3.How to edit a prospective tenant?
https://support.mipropertyportal.com/knowledgebase/how-to-edit-a-prospective-tenant/

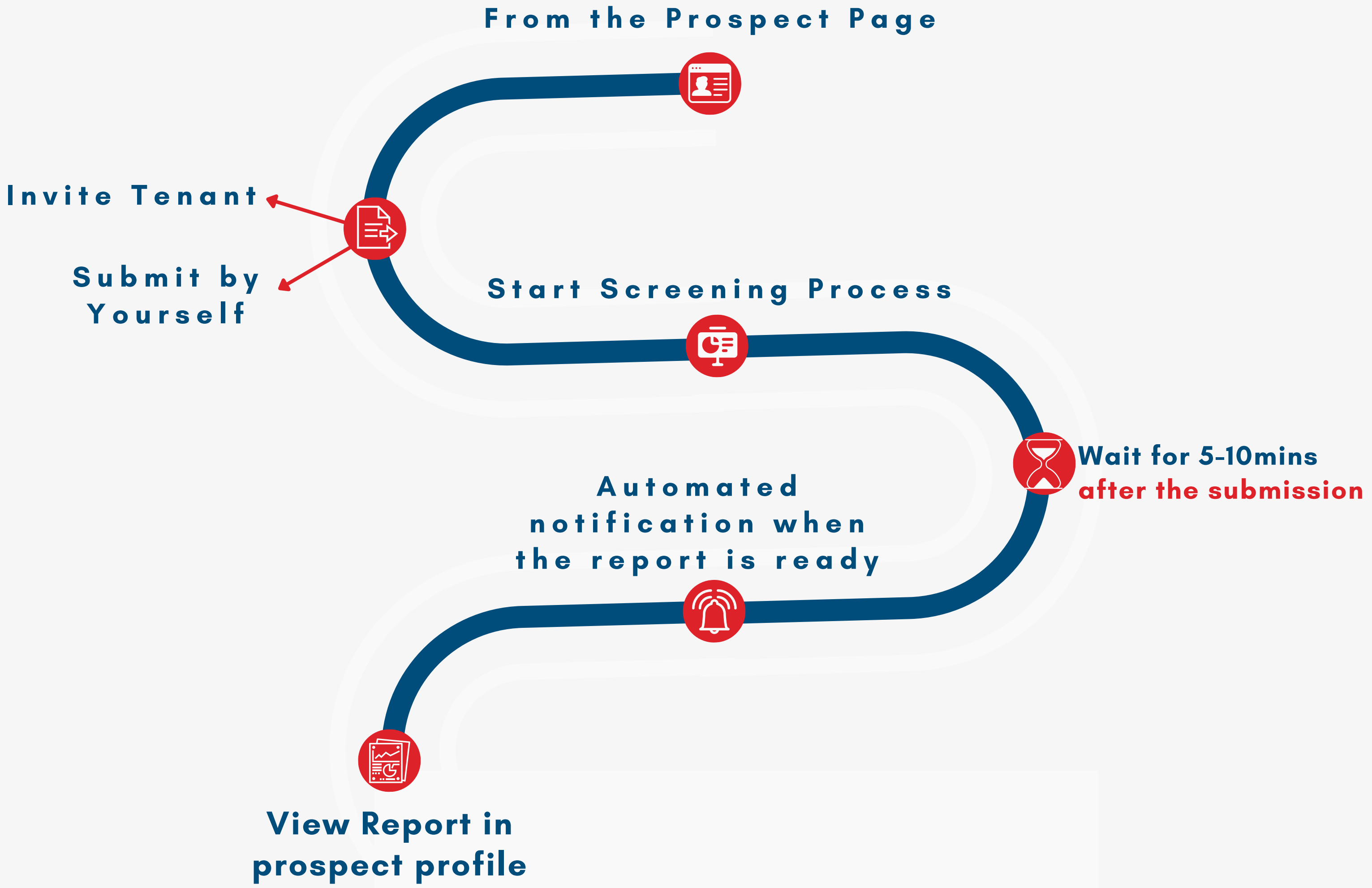
4.How to schedule a showing of property?
https://support.mipropertyportal.com/knowledgebase/how-to-schedule-a-showing-of-property/

5.How to collect more information about a guarantor?
https://support.mipropertyportal.com/knowledgebase/how-to-collect-more-information-about-a-guarantor/

6.How to collect guarantor signature?
https://support.mipropertyportal.com/knowledgebase/how-to-collect-guarantor-signature/

7.How Tenant screening process works?
https://support.mipropertyportal.com/knowledgebase/how-tenant-screening-process-works/

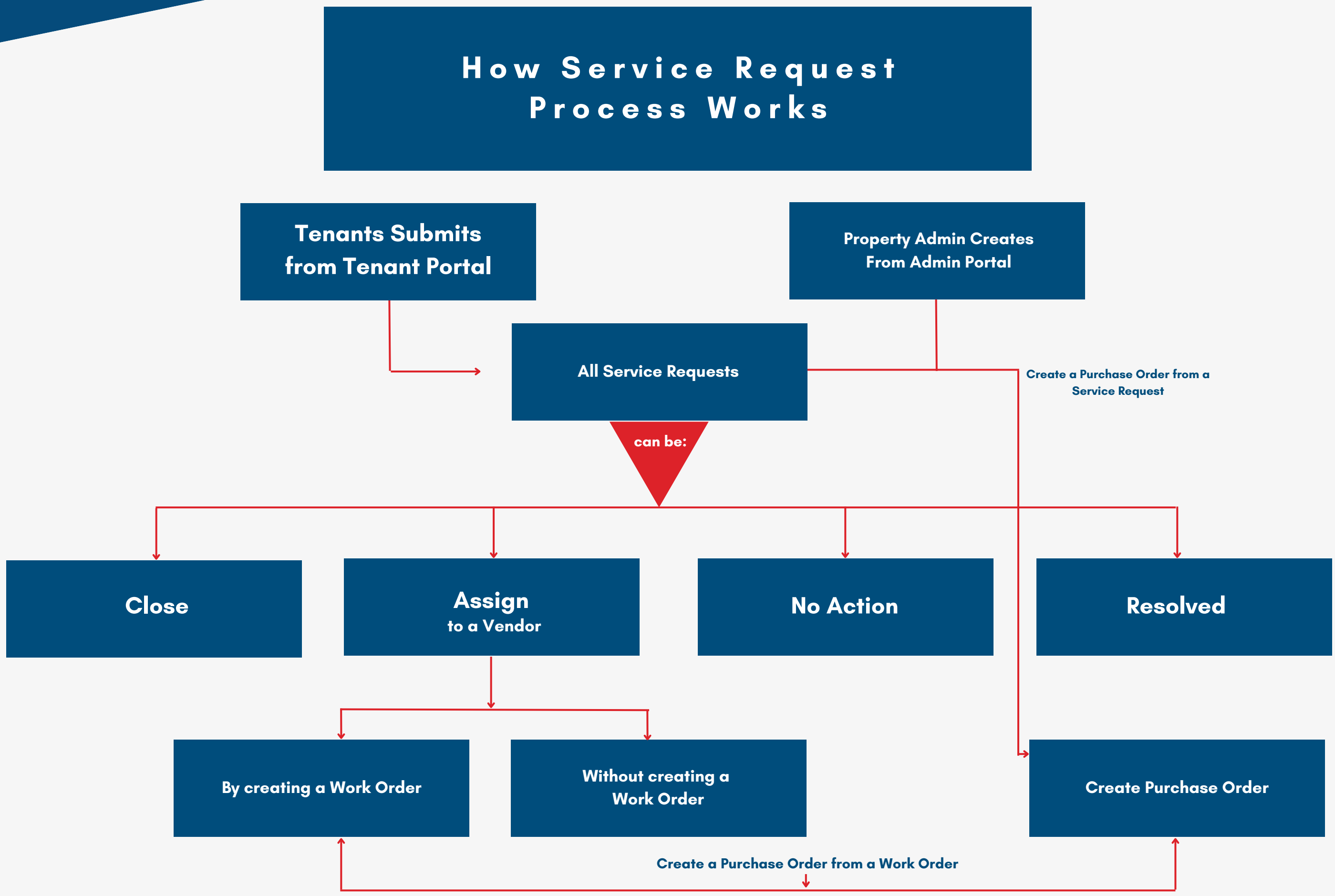
Tenant Screening Process



IMPORTANT NOTE:

Invite Tenant:
We will email the tenant an Application form to collect their info and consent.

Submit by yourself:
You will need tenant info and consent before you proceed.



1. How to create a Service Request from Admin Portal?

https://support.mipropertyportal.com/knowledgebase/how-to-create-a-service-request/

2. How to submit a service request from Tenant Portal?

https://support.mipropertyportal.com/knowledgebase/how-to-submit-a-service-request-from-tenant-portal/

3. How to create a Recurring Service Request?

https://support.mipropertyportal.com/knowledgebase/how-to-create-recurring-service-request/

4. How to create a Work Order?

https://support.mipropertyportal.com/knowledgebase/how-to-create-a-work-order/

SERVICE REQUEST

5. How to create a Purchase Order?
https://support.mipropertyportal.com/knowledgebase/how-to-create-a-purchase-order/

6. How to create a Bill from Service Request?
https://support.mipropertyportal.com/knowledgebase/how-to-create-a-bill-or-invoice-from-service-request/

7. How to hide or share tenant information from vendors?
https://support.mipropertyportal.com/knowledgebase/how-to-show-and-hide-tenant-information-with-a-vendor/

8. How to create a work order or purchase order from a service request?
https://support.mipropertyportal.com/knowledgebase/how-to-create-a-work-order-or-purchase-order-from-service-request/

WARNING:
The vendor cannot log in to the Portal as of now(coming)

TIPS:
You can SMS and Pay vendor through the system

DOCUMENT MANAGEMENT

1. Purpose of Form Management module?
https://support.mipropertyportal.com/knowledgebase/purpose-of-form-management-module/

2. How to store documents in the document management section?
https://support.mipropertyportal.com/knowledgebase/how-to-store-document-in-document-management-section/

3. How to upload documents inform management?
https://support.mipropertyportal.com/knowledgebase/how-to-upload-documents-in-form-management/

NOTE:
You can make the document private or public

INSPECTION

1. How to create inspection (different types)?
https://support.mipropertyportal.com/knowledgebase/how-to-create-inspection-different-types/

2. How to create an inspection template?
https://support.mipropertyportal.com/knowledgebase/how-to-create-an-inspection-template/

NOTE:
You can create **custom** inspection templates with your own questions and answers

OWNER PAYOUT FLOW

Let the system know that this property is managed by property manager

Configure management fee settings

Make sure all the income and expense are log and recorded properly during the property cycle

System will auto create and/or close management fee invoice, Generate report. Of course manual option is available.

Review Disbursement report and Pay owner

Share disbursement report with owners automatically!

NOTE:

Follow this section if you are managing **third-party** properties.

MANAGEMENT FEE

Management Fee is a form of service charge that the property manager charges to the owner for managing their properties.

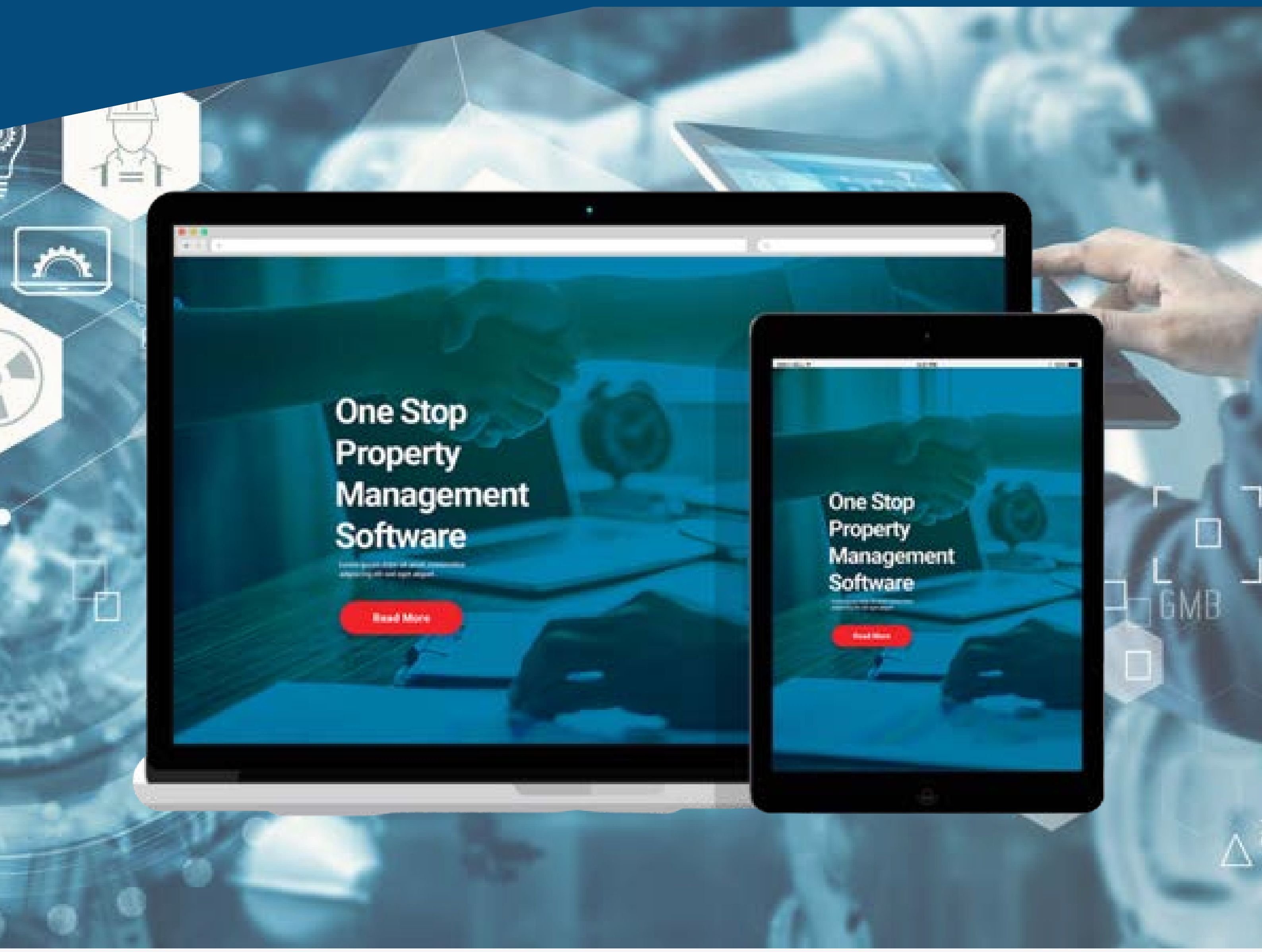
Here are **3 useful articles** for you to understand how management fee works:

1. https://support.mipropertyportal.com/knowledgebase/how-to-generate-management-fee-invoice/

2. https://support.mipropertyportal.com/knowledgebase/how-to-setup-management-fee/

3. https://support.mipropertyportal.com/knowledgebase/explanation-of-owner-payout-owner-report-management-fee-and-others-video/

NOTE:
Follow this section if you are managing **third-party** properties.



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Send your questions to help@mipropertyportal.com

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