Tracking Applicants

Property Management Solutions for Over 30 Years

Overview
This guide shows one way to keep track of applicants before they become tenants.

One Time
Set up 2 generic profiles:

Owner ID=Applications No Posting
No 1099
Unit ID=Applications No Posting
No Rent

Set up a Category of Applicant. Use this Category on notes for applicant tenants to add as many notes as you want, or use one note to record progress.

Each Time
Set up tenant profile:

Tenant ID=Actual Name No rent
No late fee
Status = Future
Category = Applicant

- Run whatever reports you need under tenant reports – can limit to category applicant.
- Run Tickler reports (under Profile reports), limit to Category applicant or to the tenant
- Receive applications – pay to management group
- Don't post any other payments until assigned to real unit.
- Change unit when applicant becomes a tenant. Change status to Past Inactive if the applicant does not become tenant.