



Circle Property Management

Owner Portal

User Guide



For more detail on your account go to Rentec at the link provided:
circle.propertymanage.biz

Your email is your log-in and the default password is WELCOME

Circle Property Management

Username
eric@circlepm.com

Password

Remember Me

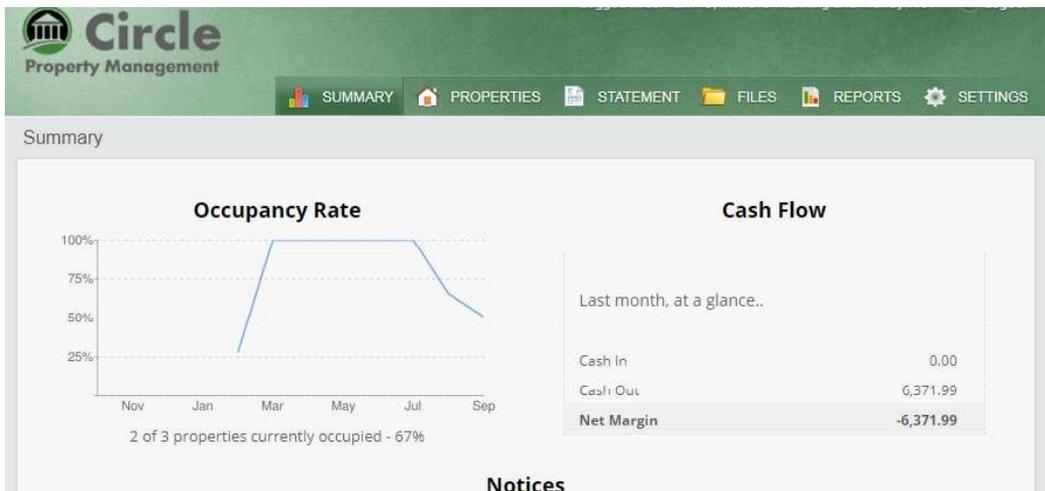
ACH Simplifies Rent Collection

With Rentec you can automatically debit your tenants checking account and take online check and credit card payments. Want to learn more?

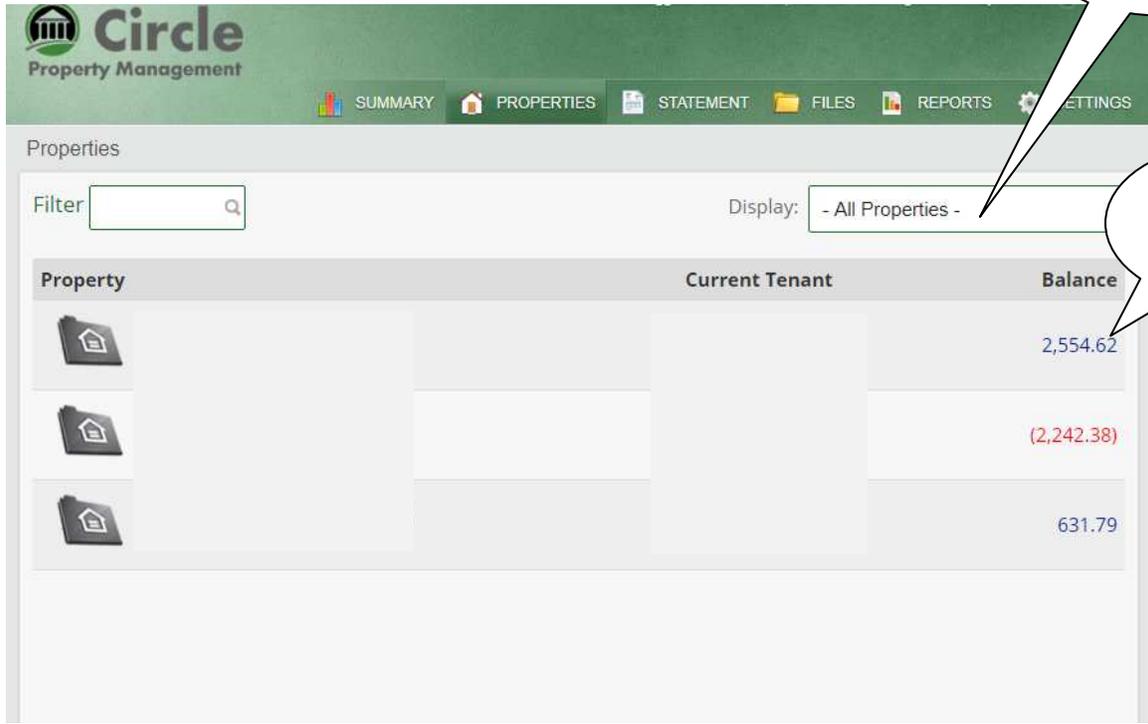
[Trouble logging in?](#)

SUMMARY TAB

After you're logged in, you will arrive at your summary tab.



Properties Tab



The screenshot shows the 'Properties' tab in the Circle Property Management system. At the top, there is a navigation bar with the following options: SUMMARY, PROPERTIES (active), STATEMENT, FILES, REPORTS, and SETTINGS. Below the navigation bar, there is a search filter and a 'Display:' dropdown menu currently set to '- All Properties -'. The main content area displays a table with three columns: Property, Current Tenant, and Balance. The table contains three rows of data, each with a house icon in the Property column.

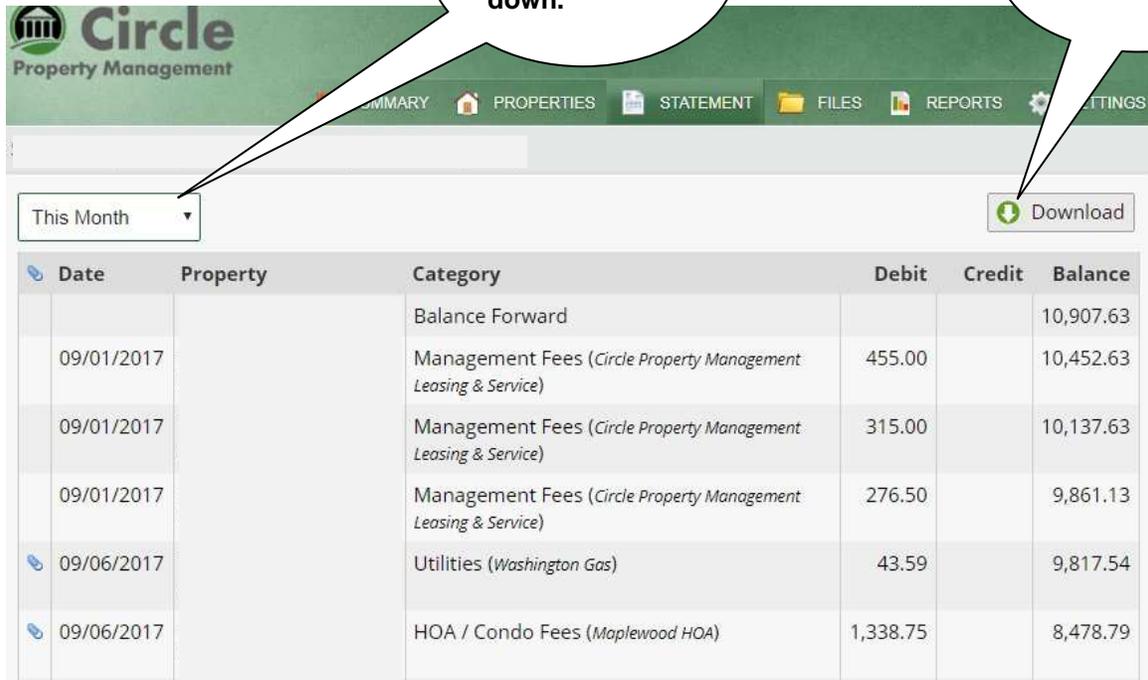
Property	Current Tenant	Balance
		2,554.62
		(2,242.38)
		631.79

Sort your properties here.

Click here to view ledger.

Please note: you can review each property separately by clicking on the balance amount on the right. You can also sort your properties with the drop down on the top right.

STATEMENT TAB

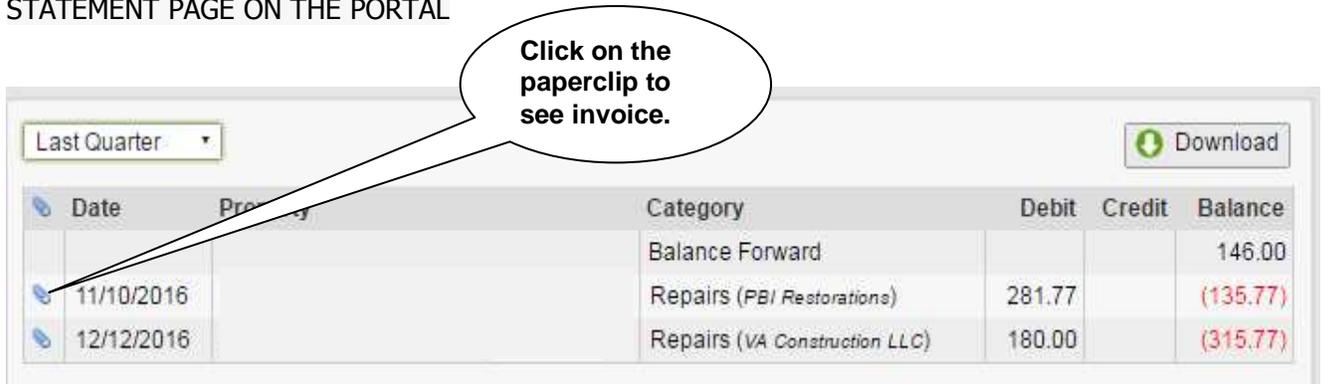


Date	Property	Category	Debit	Credit	Balance
		Balance Forward			10,907.63
09/01/2017		Management Fees (Circle Property Management Leasing & Service)	455.00		10,452.63
09/01/2017		Management Fees (Circle Property Management Leasing & Service)	315.00		10,137.63
09/01/2017		Management Fees (Circle Property Management Leasing & Service)	276.50		9,861.13
09/06/2017		Utilities (Washington Gas)	43.59		9,817.54
09/06/2017		HOA / Condo Fees (Maplewood HOA)	1,338.75		8,478.79

TIP 1. There is a drop down menu on the top left which sorts by the year or month or for ever. (Instructions included)

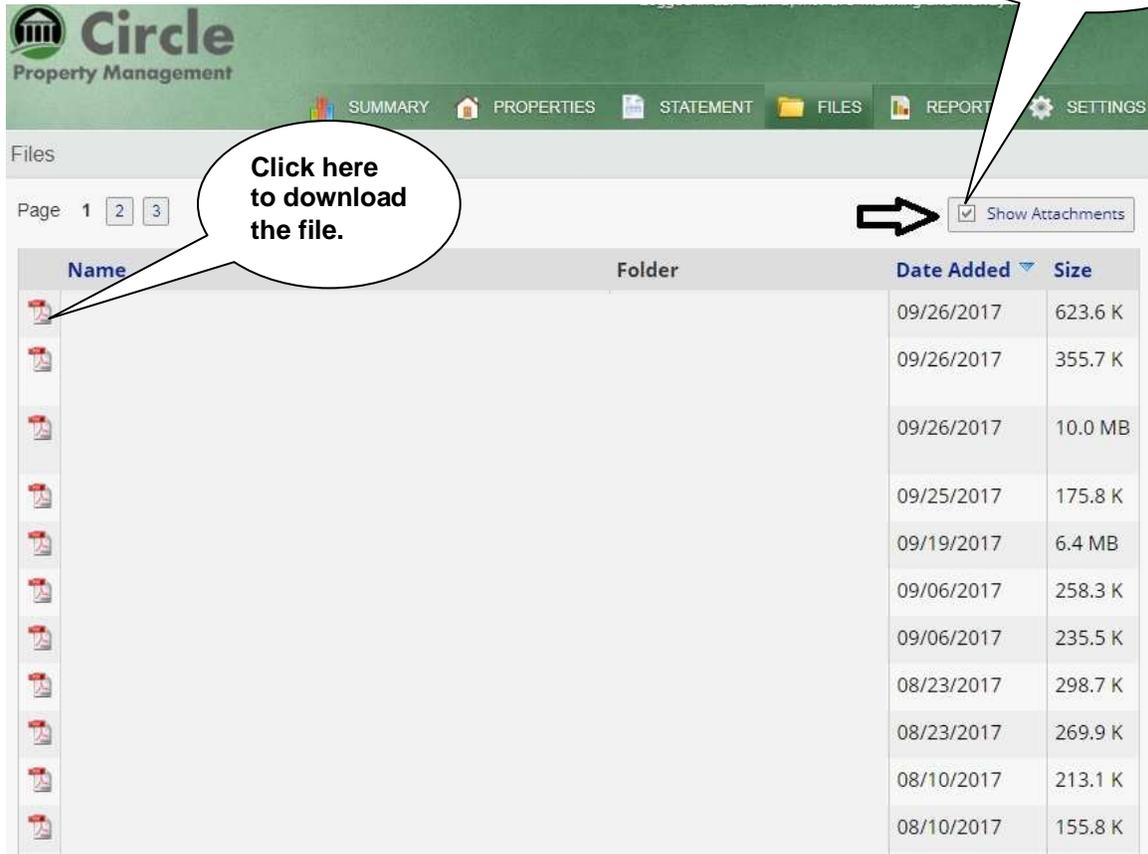
TIP 2. There is a paper clip on the left of the expense row which can be clicked on for more details about the work order or expense.

STATEMENT PAGE ON THE PORTAL



Date	Property	Category	Debit	Credit	Balance
		Balance Forward			146.00
11/10/2016		Repairs (FBI Restorations)	281.77		(135.77)
12/12/2016		Repairs (VA Construction LLC)	180.00		(315.77)

FILES TAB



Circle Property Management

SUMMARY PROPERTIES STATEMENT **FILES** REPORT SETTINGS

Files

Page 1 2 3

Click here to download the file.

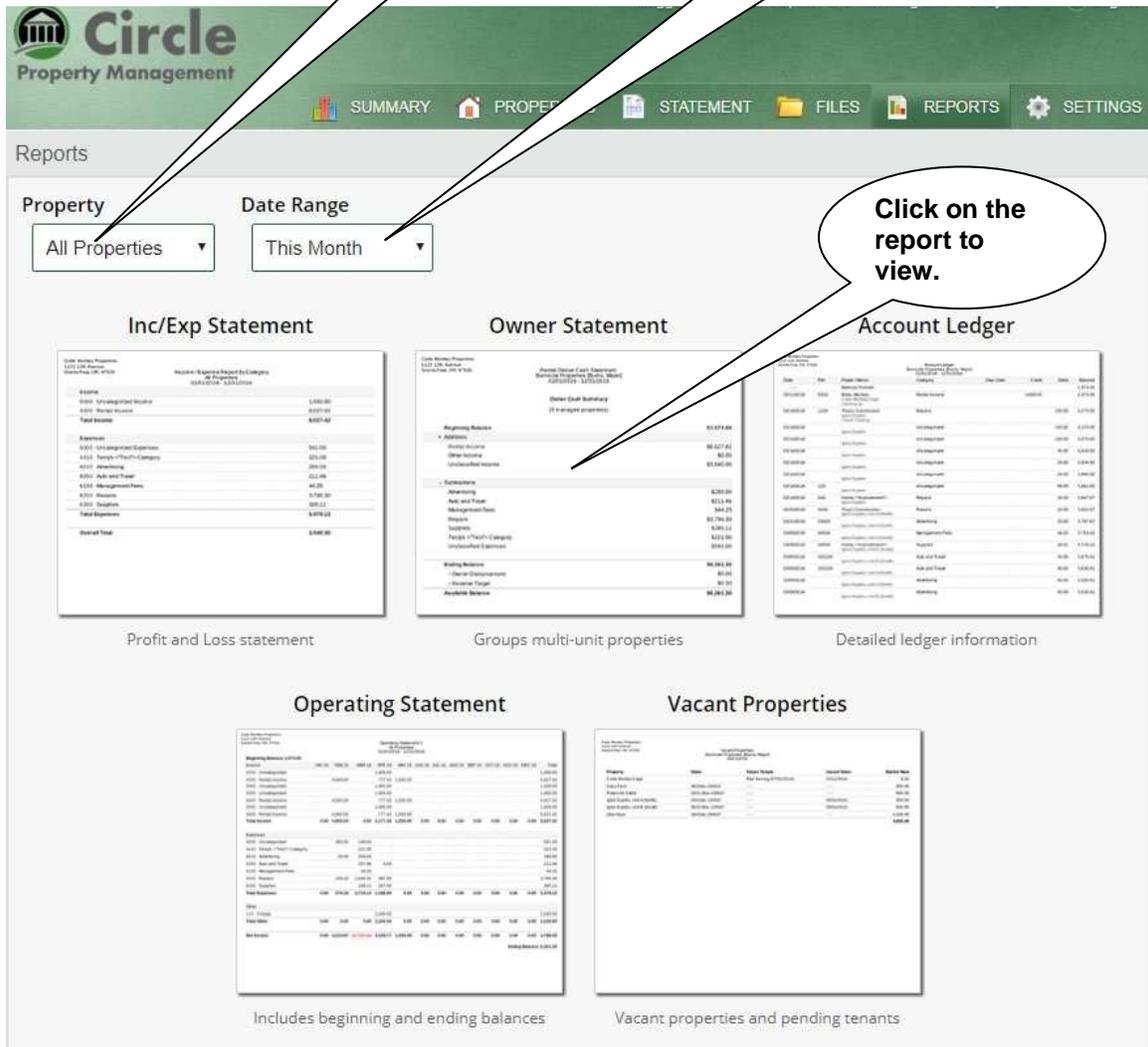
Please make sure you check the box to show all the attachments.

Show Attachments

Name	Folder	Date Added	Size
		09/26/2017	623.6 K
		09/26/2017	355.7 K
		09/26/2017	10.0 MB
		09/25/2017	175.8 K
		09/19/2017	6.4 MB
		09/06/2017	258.3 K
		09/06/2017	235.5 K
		08/23/2017	298.7 K
		08/23/2017	269.9 K
		08/10/2017	213.1 K
		08/10/2017	155.8 K

Please make sure to check the **"Show attachments"** check box on the top right to **see all of your files**. If you want to view, download or print you will need to click on the document icon on the left.

REPORTS TAB



The screenshot shows the 'Reports' section of the Circle Property Management software. At the top, there is a navigation bar with icons for SUMMARY, PROPERTIES, STATEMENT, FILES, REPORTS, and SETTINGS. Below this, the 'Reports' section is active, showing filters for 'Property' (set to 'All Properties') and 'Date Range' (set to 'This Month').

Three callouts provide instructions:

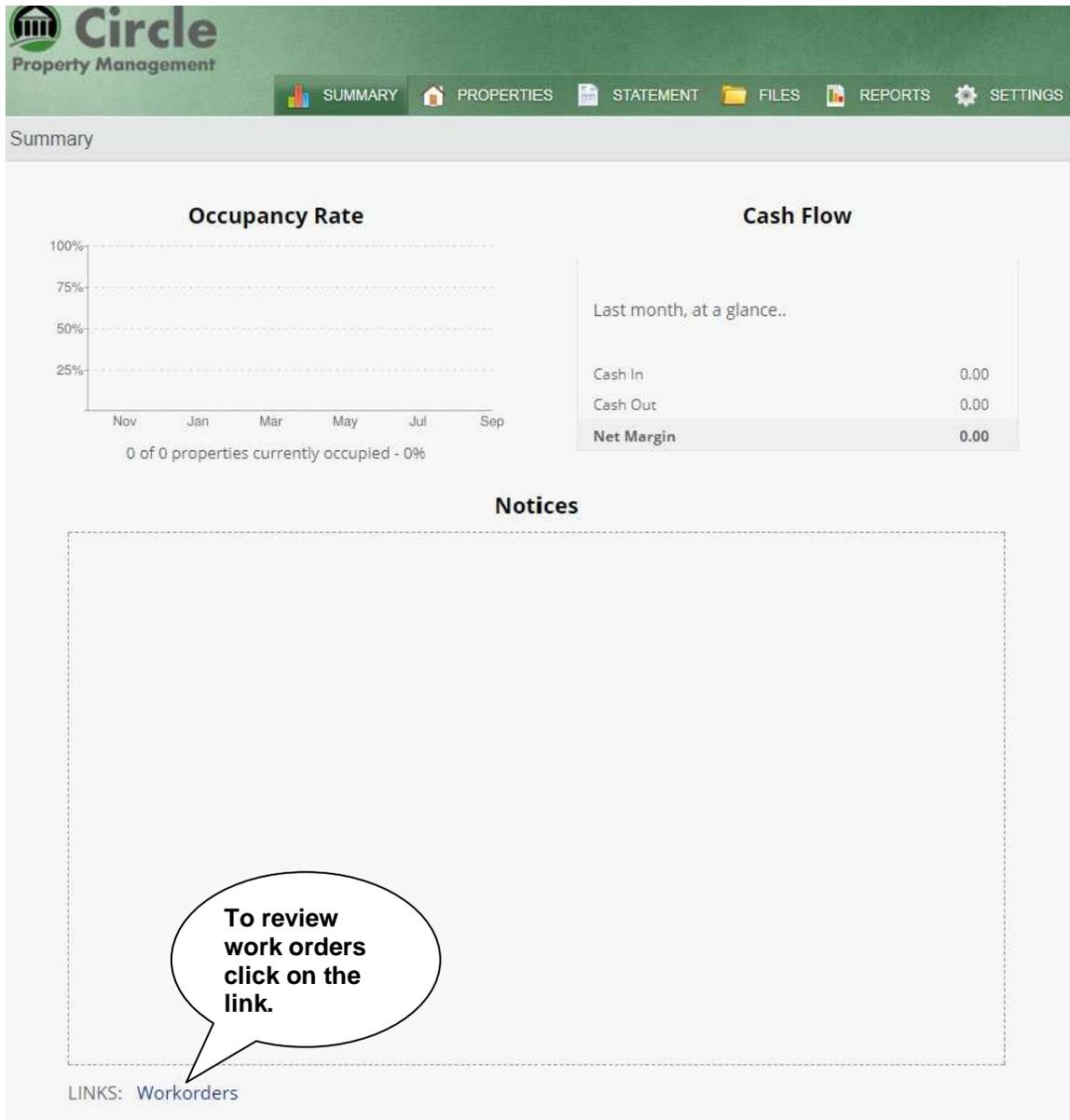
- Sort your properties here.** (Points to the 'Property' dropdown menu)
- Dates for your reports are here. Drop down menu.** (Points to the 'Date Range' dropdown menu)
- Click on the report to view.** (Points to the 'Inc/Exp Statement' report icon)

Five report thumbnails are displayed:

- Inc/Exp Statement:** Profit and Loss statement
- Owner Statement:** Groups multi-unit properties
- Account Ledger:** Detailed ledger information
- Operating Statement:** Includes beginning and ending balances
- Vacant Properties:** Vacant properties and pending tenants

Once you have selected your property and the date range you wish for then click on the report icon for your report to be created which can be view, printed or downloaded.

WORK ORDERS



The screenshot shows the Circle Property Management dashboard. The top navigation bar includes: SUMMARY, PROPERTIES, STATEMENT, FILES, REPORTS, and SETTINGS. The main content area is titled "Summary" and contains three sections:

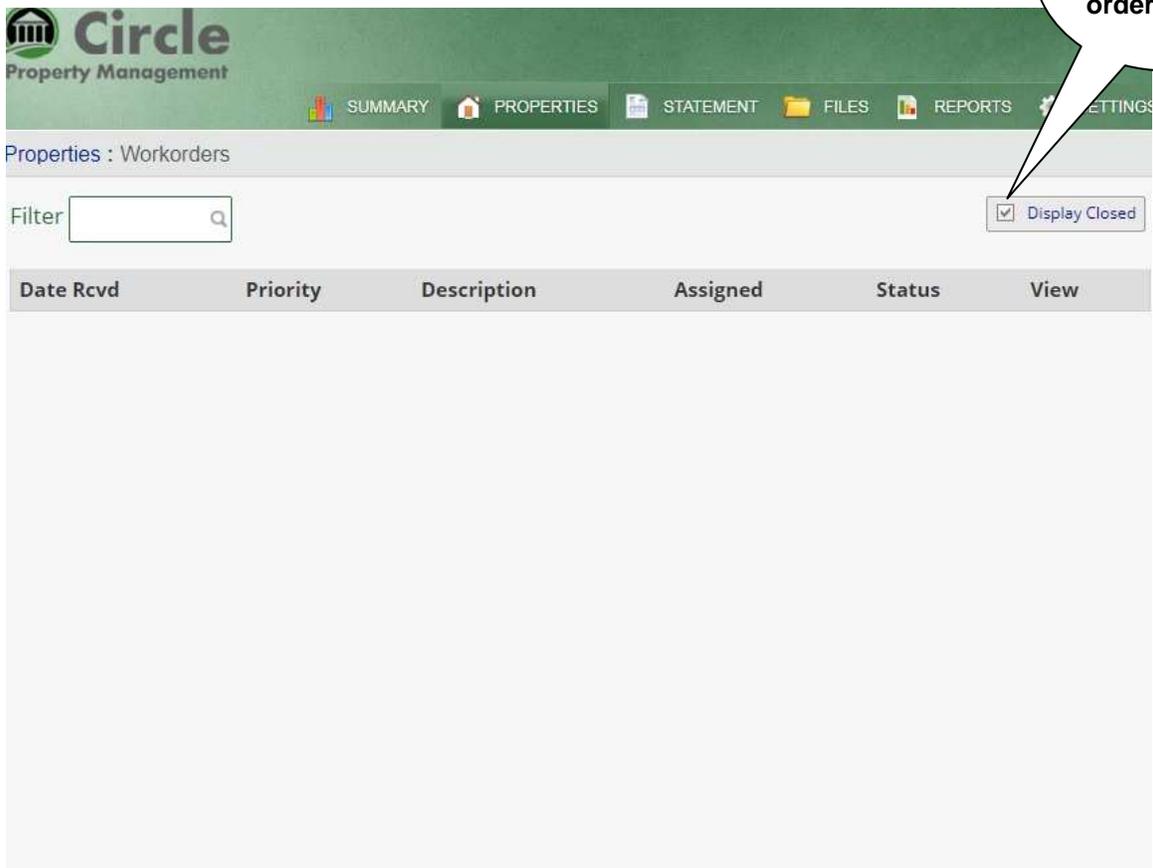
- Occupancy Rate:** A line chart showing occupancy percentage from Nov to Sep. The y-axis ranges from 0% to 100%. Below the chart, it states "0 of 0 properties currently occupied - 0%".
- Cash Flow:** A table titled "Last month, at a glance..".

Cash In	0.00
Cash Out	0.00
Net Margin	0.00
- Notices:** A large dashed rectangular area containing a speech bubble that says "To review work orders click on the link." Below this area, there is a link labeled "LINKS: Workorders".

To review work orders click on the Work Orders link at the bottom left.

Reviewing Your Work Orders

Your open work orders will appear on this page and if you wish to review any previous "closed" work orders you will need to check the box "Display Closed".



The screenshot shows the Circle Property Management interface for the 'Workorders' section. At the top, there is a navigation bar with icons and labels for SUMMARY, PROPERTIES, STATEMENT, FILES, REPORTS, and SETTINGS. Below this, the page title is 'Properties : Workorders'. A search filter box is present on the left. On the right, there is a checkbox labeled 'Display Closed' which is checked. A callout box with a speech bubble points to this checkbox, containing the text: 'Check this box to see closed work orders.' Below the checkbox is a table header with columns: Date Rcvd, Priority, Description, Assigned, Status, and View.