



QuiSuite Rental

Landlords, properties, tenancies, rent, client money and compliance:
a step-by-step guide for letting agents and landlords

Example_QSRental

Everything in this guide is done in the Demo Rental company on the QuiSuite USB test drive, so you can follow every step yourself.

How to use this guide

Plug in the QuiSuite USB drive, open **TestDrive.bat**, press **5** for QuiSuite Rental, and log in as **Admin** with the password **Admin**.

Read a page, then do the same thing on the screen. Nothing you do can harm anything: the test drive starts afresh every time.

QuiSuite Platform version 1.34

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Welcome to QuiSuite Rental

QuiSuite Rental is a **Vertical Application**: a program made for one kind of business, built on the full QuiSuite accounts system. It is for letting agents who manage other people's properties, and for landlords who let their own, residential or commercial.

3 landlords, with 4 units in 3 properties	£1,650 rent raised, received and paid over in this guide	£1,024.32 paid to a landlord after fees, repairs and tax
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In this guide you will:

- set up landlords, properties, units and tenancies;
- raise the rent, record it when it arrives, and keep tenants' money apart from your own;
- make a landlord's statement, with your fees, the repairs and any tax kept back;
- keep on top of maintenance, safety certificates, inspections and deposits.

Starting QuiSuite Rental



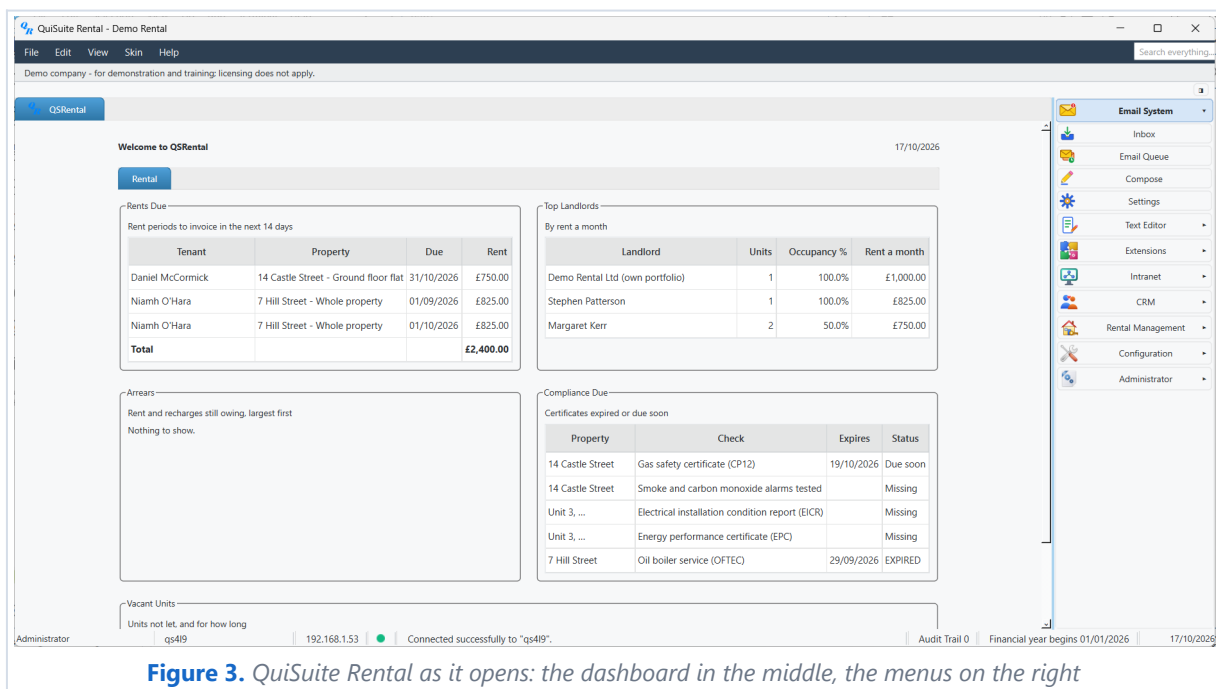
Figure 1. The splash screen



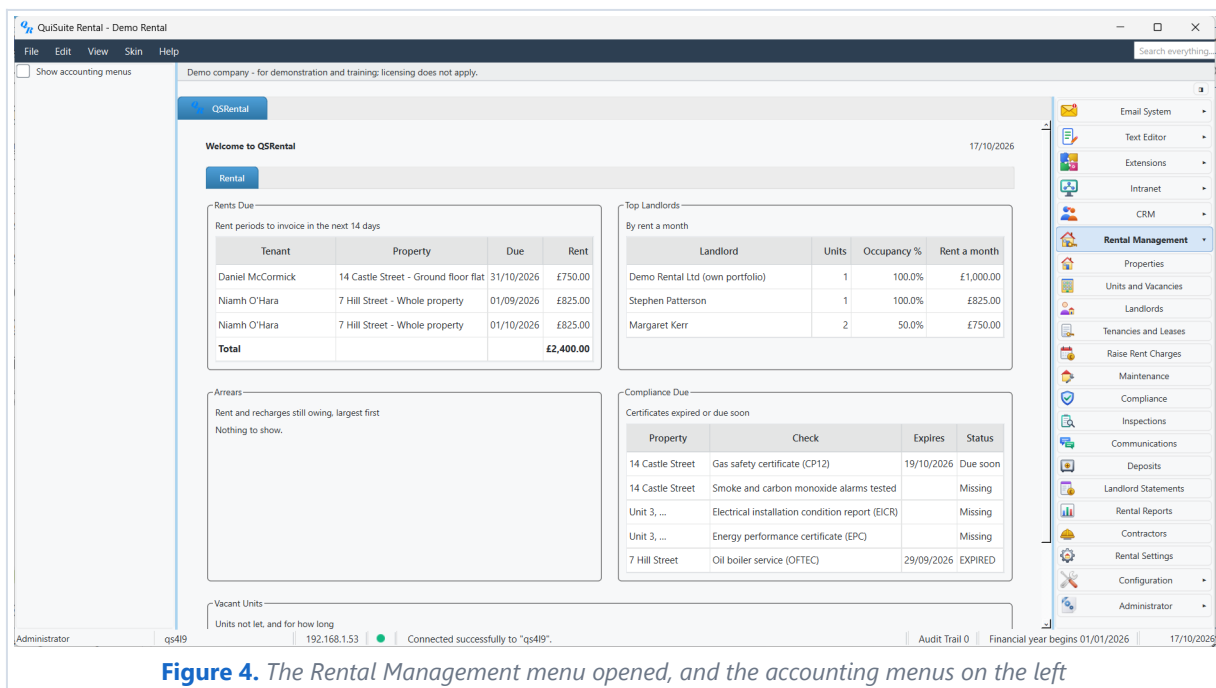
Figure 2. Logging in to Demo Rental

When QuiSuite Rental starts, its splash screen shows its own name under **Powered by QuiSuite Platform**, with the program and database versions. The login window then lists the companies it may open: on the test drive, **Demo Rental**. Log in as **Admin**, password **Admin**.

The main window



The **dashboard** fills the middle: rent due in the next fortnight, the top landlords, arrears, certificates expired or due soon, and empty units. The **menus** are on the right: Email, the Text Editor, Extensions, the Intranet and the CRM, which every QuiSuite program shares, then **Rental Management**, the subject of this guide, then Configuration and Administrator.



Click **Rental Management** and its items open beneath it: **Properties, Units and Vacancies, Landlords, Tenancies and Leases, Raise Rent Charges, Maintenance, Compliance,**

Inspections, Communications, Deposits, Landlord Statements, Rental Reports, Contractors and Rental Settings.

Behind the scenes is a full accounts system: tenants are customers in the Sales Ledger, landlords and contractors are suppliers in the Purchase Ledger. The accounting menus stay out of the way on the left: press **F10** (or [Help > Toggle Menu](#)) and tick **Show accounting menus** to see them.

How a letting agent's money works

Three ideas, and the rest of QuiSuite Rental follows from them.

1. The rent is the landlord's, not yours

When a tenant pays rent on a property you manage, that money belongs to the landlord. It goes into a separate **client account** at the bank and into the **client monies** account in the books. QuiSuite never mixes it with the agency's own money (the **office account**). Rent from properties the agency owns itself (its **own portfolio**) is the agency's income straight away.

2. Each month, the landlord gets a statement

The **landlord statement** takes the rent received for the landlord, takes off your **management fee** (and its VAT), any **repairs** paid on their behalf, and any **non-resident landlord tax**, and shows what is left to pay them. Finalising it moves your fees into the office account and raises the payment to the landlord.

3. Some landlords live abroad

If a landlord lives outside the UK, HMRC requires the agent to keep back basic-rate tax (20%) from the rent, after fees and expenses, and pay it to HMRC, unless HMRC has given the landlord approval to be paid in full. This is the **Non-Resident Landlord** scheme, and QuiSuite works it out on every statement.

QR Setting up

Rental Settings

Rental Settings

Accounts and banks | Tenancy agreement | Commercial lease

Client monies account: 2400 Client monies held for landlords

Rental income account: 4904 Rent income

Fee income account: 4910 Letting and management fees

Maintenance account: 7800 Repairs & renewals

NRL tax account: 2410 Non-resident landlord tax

Client bank: Client Account

Office bank: Office Account

NRL tax %: 20

Inspect every (months): 3

Save Cancel

Figure 5. Rental Settings: the accounts, the banks and the rules

Open **Rental Management > Rental Settings** once, first. **Accounts and banks** says where the money goes: **2400 Client monies held for landlords**, **4904 Rent income** (your own properties), **4910 Letting and management fees**, **7800 Repairs and renewals** and **2410 Non-resident landlord tax**; the **client bank** (Client Account) and **office bank** (Office Account); the **NRL tax %** (20) and how often to **inspect** (every 3 months). The other two tabs hold the wording of the **tenancy agreement** and the **commercial lease** that QuiSuite prints for you.

Landlords and properties

Landlords

Ref	Landlord	Contact	Phone	Email	Town	Properties	Own portfolio	Non-resident	Statements	Registration	
L0003	Stephen Patterson	Stephen Patterson		s.patterson@example.es	Alicante, Spain	1		X	Monthly	NI-LR-519870	31/6
L0002	Demo Rental Ltd (own portfolio)					1	X		Monthly		
L0001	Margaret Kerr	Margaret Kerr		m.kerr@example.com	Ballymena	1			Monthly	NI-LR-482211	31/6

Figure 6. The landlords

Rental Management > Landlords lists the owners: Stephen Patterson, who lives in Spain (ticked **Non-resident**), Margaret Kerr in Ballymena, and the agency's **own portfolio**. Each shows how often they get a statement and their landlord registration number.

Landlord | Money and tax | Notes | Properties | Fees and charges | Statements | Communications

Owner

Reference: L0003

Name: Stephen Patterson

Contact: Stephen Patterson

Our own portfolio: ☐

Prefers: Email

Contact details

Address: Calle Mayor 14

Town: Alicante, Spain

County:

Postcode:

Phone:

Mobile:

Email: s.patterson@example.es

New Supplier Account... | Save | Close

Figure 7. A landlord's record

Landlord holds who they are and how to reach them, and whether this is **our own portfolio**.

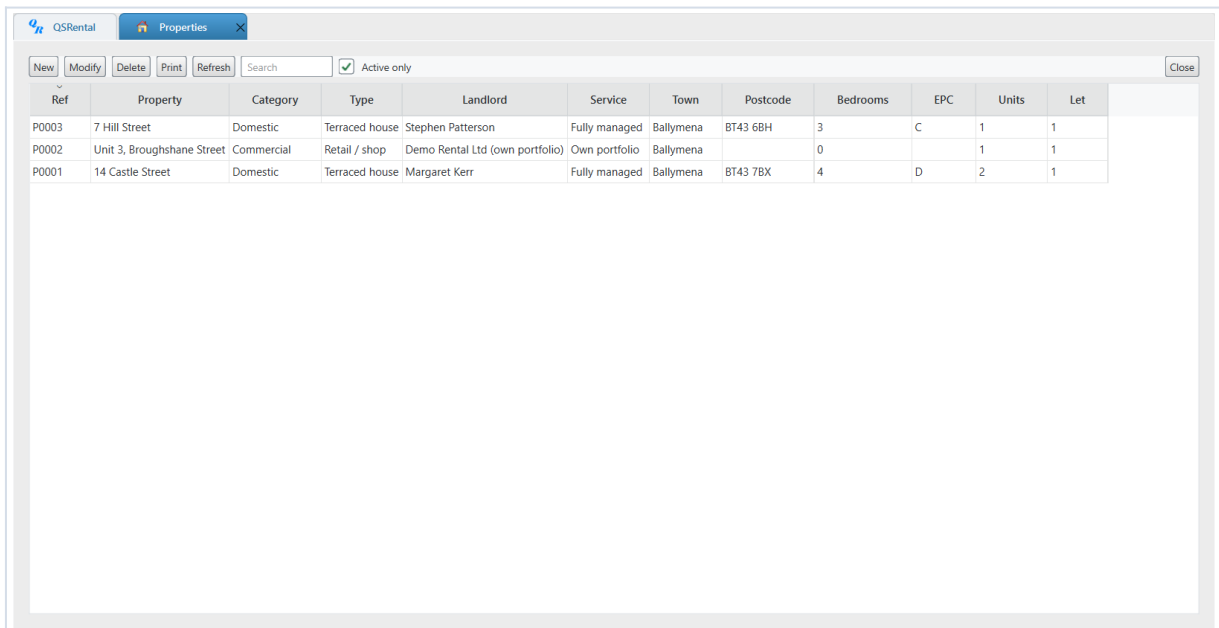
The screenshot shows the 'Landlord' form in the QuiSuite application, specifically the 'Money and tax' tab. The form is organized into several sections. On the left, under 'Statements and fees', there's a dropdown for 'Statements' (currently 'Monthly'), a text input for 'Usual management fee %' (currently '12.00'), and a dropdown for 'Supplier account' (currently 'Stephen Patterson'). Below this is the 'Registration and tax' section, which includes a text input for 'Landlord registration' (currently 'NI-LR-519870'), a dropdown for 'Registration expires' (currently '31/03/2029'), a checked checkbox for 'Non-resident landlord', and a text input for 'HMRC approval'. To the right of these sections is a 'Bank' section with text inputs for 'Bank' (currently 'Northern Counties Bank'), 'Account name', 'Sort code' (currently '95-03-11'), and 'Account number' (currently '55128840'). At the bottom left of the form is a button labeled 'New Supplier Account...', and at the bottom right are 'Save' and 'Close' buttons.

Figure 8. *Money and tax*

Money and tax holds how often they get a **statement** (monthly), their usual **management fee** (12%), the **supplier account** they are paid through, their **bank details**, their **landlord registration** and its expiry, and whether they are a **non-resident landlord** (with HMRC's approval number, if they have one: then no tax is kept back). **New Supplier Account...** makes the supplier account if they have none.

The other pages list the landlord's **properties**, any **fees and charges** waiting for their next statement, their **statements**, and every **communication** with them.

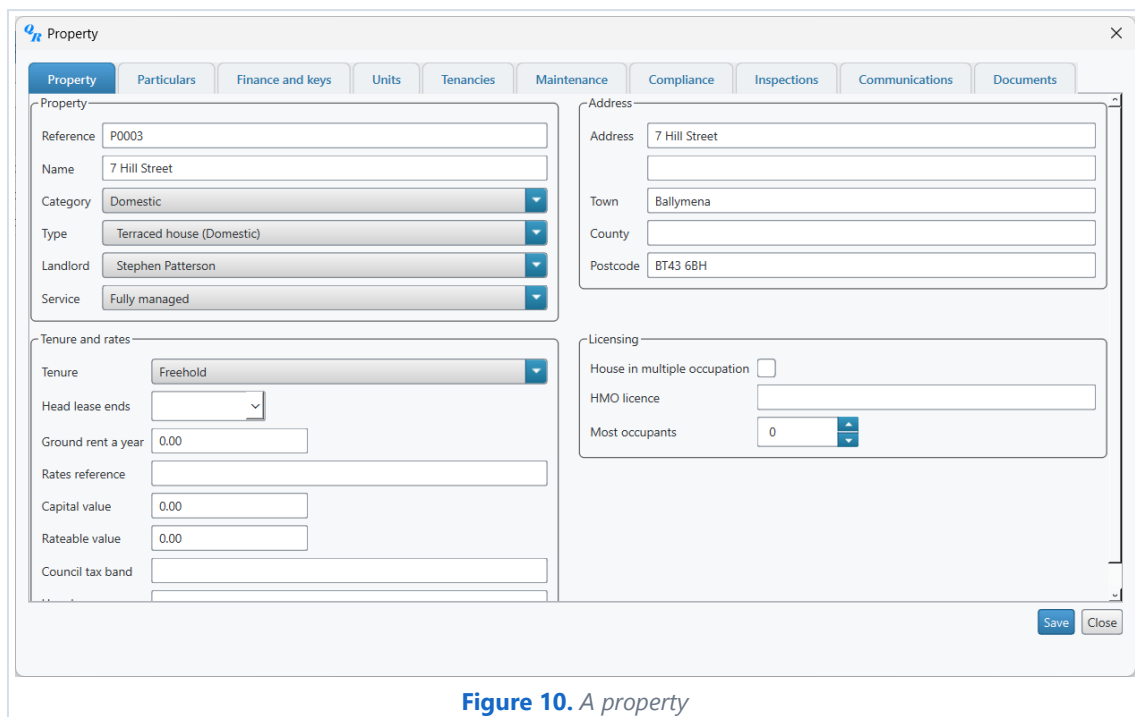
Properties



Ref	Property	Category	Type	Landlord	Service	Town	Postcode	Bedrooms	EPC	Units	Let
P0003	7 Hill Street	Domestic	Terraced house	Stephen Patterson	Fully managed	Ballymena	BT43 6BH	3	C	1	1
P0002	Unit 3, Broughshane Street	Commercial	Retail / shop	Demo Rental Ltd (own portfolio)	Own portfolio	Ballymena		0		1	1
P0001	14 Castle Street	Domestic	Terraced house	Margaret Kerr	Fully managed	Ballymena	BT43 7BX	4	D	2	1

Figure 9. The properties

Rental Management > Properties lists every property: 7 Hill Street (a terraced house, fully managed for Stephen Patterson), Unit 3 Broughshane Street (a shop in the agency's own portfolio) and 14 Castle Street (a townhouse divided into two flats, for Margaret Kerr).



Property

Reference: P0003
 Name: 7 Hill Street
 Category: Domestic
 Type: Terraced house (Domestic)
 Landlord: Stephen Patterson
 Service: Fully managed

Address

Address: 7 Hill Street
 Town: Ballymena
 County:
 Postcode: BT43 6BH

Tenure and rates

Tenure: Freehold
 Head lease ends:
 Ground rent a year: 0.00
 Rates reference:
 Capital value: 0.00
 Rateable value: 0.00
 Council tax band:

Licensing

House in multiple occupation: ☐
 HMO licence:
 Most occupants: 0

Save Close

Figure 10. A property

Property holds the property itself: its type, landlord and the **service** you provide (fully managed, rent collection or let only), its tenure, rates and any HMO licence. **Particulars** holds the bedrooms, features and description used in adverts; the other pages list its **units**,

tenancies, maintenance, compliance certificates, inspections, communications and documents.

Ref	Property	Unit	Type	Status	Tenant	Rent	Market rent	Period	Available	Bedrooms	Fee	Landlord
P0003/1	7 Hill Street	Whole property	Whole property	Let	Niamh O'Hara	825.00	825.00	Monthly		3	12.00%	Stephen Patterson
P0002/1	Unit 3, Broughshane Street	Whole property	Whole property	Let	Jane's Kitchen	3,000.00	0.00	Quarterly		0	None	Demo Rental Ltd (own p
P0001/2	14 Castle Street	First floor flat		Vacant			650.00	Monthly		2	50.00	Margaret Kerr
P0001/1	14 Castle Street	Ground floor flat	Whole property	Let	Daniel McCormick	750.00	750.00	Monthly		2	10.00%	Margaret Kerr

Figure 11. Units and vacancies

Rental Management > Units and Vacancies lists every unit with its status: **Let** or **Vacant**. The first floor flat at 14 Castle Street is empty: the dashboard counts how long it has been empty.

QR Tenancies

Ref	Tenant	Property	Unit	Type	Status	Start	End	Rent	Period	Next charge	Deposit	Break
T00003	Niamh O'Hara	7 Hill Street	Whole property	Private tenancy (Northern Ireland)	Active	01/09/2026	31/08/2027	825.00	Monthly	01/09/2026	825.00	
T00002	Jane's Kitchen	Unit 3, Broughshane Street	Whole property	Commercial lease	Active	10/08/2026	09/08/2031	3,000.00	Quarterly	25/12/2026	0.00	10/08/2029
T00001	Daniel McCormick	14 Castle Street	Ground floor flat	Private tenancy (Northern Ireland)	Active	31/07/2026	30/07/2027	750.00	Monthly	31/10/2026	900.00	

Figure 12. Tenancies and leases

Rental Management > Tenancies and Leases lists every tenancy: its reference, unit, tenant, rent, dates and status.

Parties

Reference: T00003

Unit: 7 Hill Street - Whole property

Tenant: Niamh O'Hara

Joint tenants:

Occupants: 2

Type: Private tenancy (Northern Ireland)

Rent

Rent: 825.00

Period: Monthly

On the quarter days:

In advance: ☒

Rent day: 0

Next period from: 01/09/2026

Service charge: 0.00

Term

Status: Active

Starts: 01/09/2026

Fixed term ends: 31/08/2027

Then periodic: ☐

Notice given:

Move-out:

Buttons: New Tenant..., Start Tenancy, Notice..., End Tenancy..., Change Rent..., Letting Fee, Charge Tenant..., Rent Received..., Print Lease, Notice of Terms, Save, Close

Figure 13. Niamh O'Hara's tenancy of 7 Hill Street

Tenancy holds the parties (unit, **tenant**, joint tenants, occupants), the **term** (start, fixed-term end, whether it then runs on periodically, notice) and the **rent**: £825 a month, in advance, with the **next period from** date QuiSuite will charge from next.

The screenshot shows the 'Deposit and checks' form in the QuiSuite application. The form is titled 'Tenancy' and has a tabbed interface with 'Deposit and checks' selected. The 'Deposit' section contains fields for 'Deposit' (825.00), 'Scheme' (TDS Northern Ireland), 'Scheme reference' (TDS-NI-771204), 'Received' (25/08/2026), 'Protected' (08/09/2026), 'Information served' (08/09/2026), 'Status' (Protected), 'Returned', 'Amount returned' (0.00), and 'Deductions'. The 'Checks' section contains fields for 'Notice of terms served' (20/09/2026), 'Right to rent checked', 'References checked', 'Emergency contact' (Brendan O'Hara, 07700 900233), and 'Pets'. At the bottom of the form, there is a row of buttons: 'New Tenant...', 'Start Tenancy', 'Notice...', 'End Tenancy...', 'Change Rent...', 'Letting Fee', 'Charge Tenant...', 'Rent Received...', 'Print Lease', 'Notice of Terms', 'Save', and 'Close'.

Figure 14. Deposit and checks

Deposit and checks records the deposit: £825, the **scheme** it is protected with, the dates received, **protected** and **information served**, and its status (**Protected**). The checks record the notice of tenancy terms, right to rent, references and an emergency contact.

The buttons along the bottom do the jobs of a tenancy: **Start Tenancy** (the unit becomes Let), **Notice...**, **End Tenancy...**, **Change Rent...** (kept in the rent history), **Letting Fee**, **Charge Tenant...** (a one-off invoice for damage or works), **Rent Received...**, **Print Lease** and the Northern Ireland **Notice of Terms**.



Raising the rent

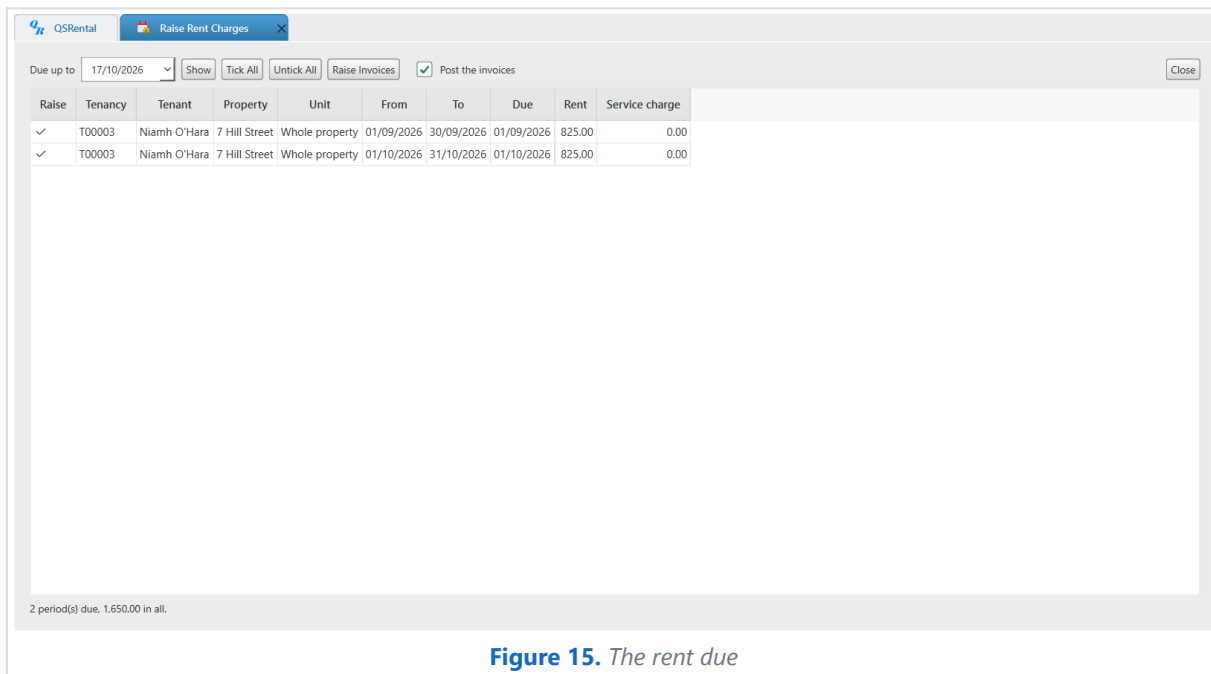


Figure 15. The rent due

Rental Management > Raise Rent Charges lists every rent period due up to the date at the top: Niamh O'Hara's tenancy started on 1 September, so September's and October's rent are due, £1,650 in all. Every period is ticked; **Post the invoices** is ticked too, so each goes straight to the tenant's account.

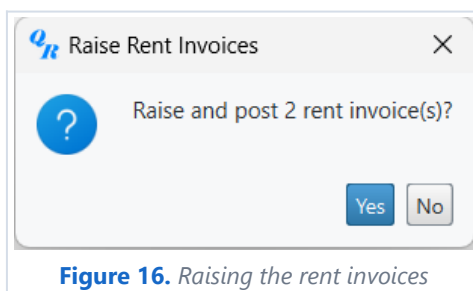
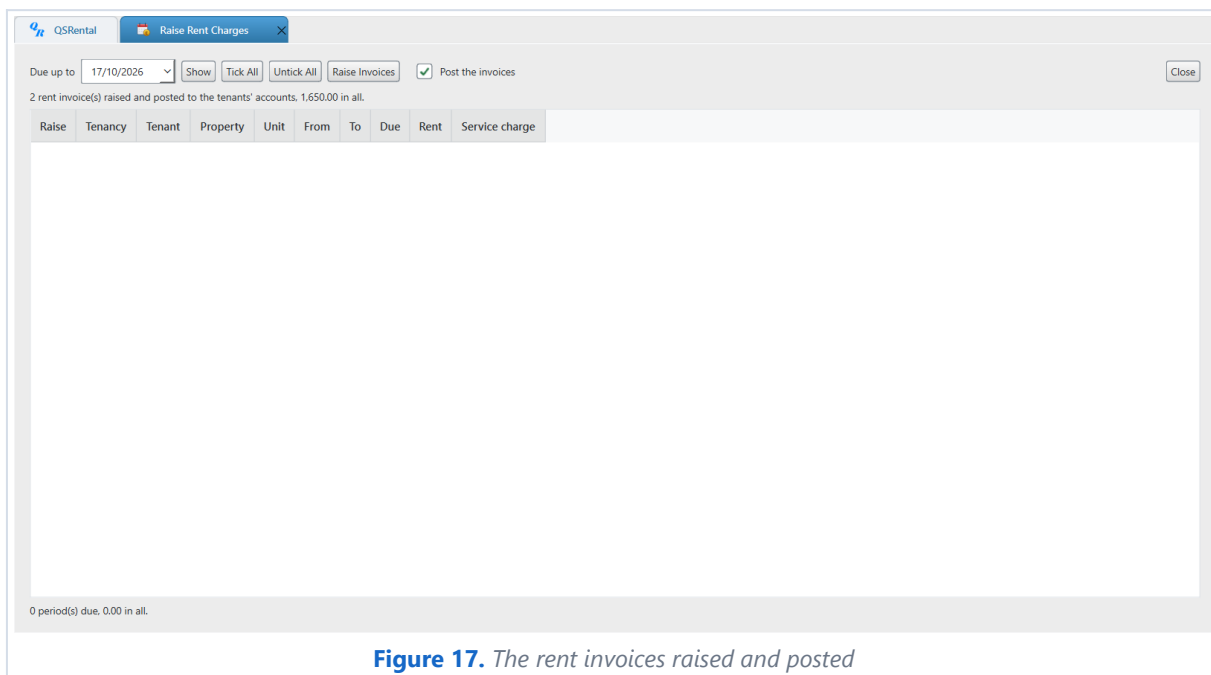


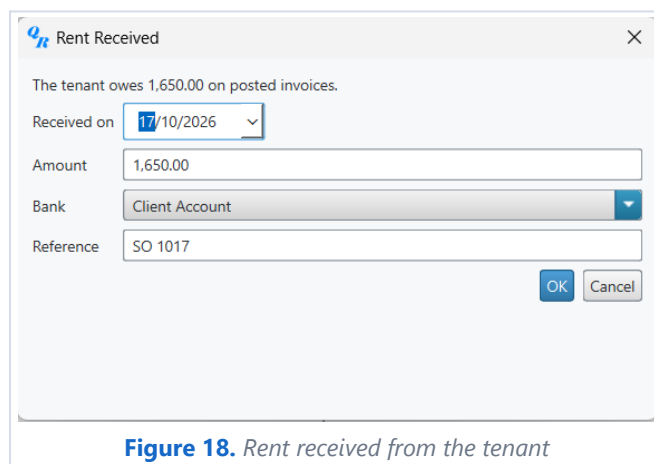
Figure 16. Raising the rent invoices

Press **Raise Invoices** and answer **Yes**.



"2 rent invoice(s) raised and posted to the tenants' accounts." Each period is invoiced once: the list is now empty, and the tenancy's next period is November.

Rent received



When the money arrives, open the tenancy and press **Rent Received...** QuiSuite says what the tenant owes (£1,650), fills in the amount, and chooses the bank: the **Client Account**, because this property is managed for a landlord. Give the date and the bank's reference, and press **OK**.

1,650.00 received from the tenant and set against their invoices.

Tenancy | Deposit and checks | Lease terms | Charges | Rent history | Communications | Maintenance | Inspections | Documents

Parties

Reference: T00003

Unit: 7 Hill Street - Whole property

Tenant: Niamh O'Hara

Joint tenants:

Occupants: 2

Type: Private tenancy (Northern Ireland)

Term

Status: Active

Starts: 01/09/2026

Fixed term ends: 31/08/2027

Then periodic: ☐

Notice given:

Move-out:

Rent

Rent: 825.00

Period: Monthly

On the quarter days: ☐

In advance: ☒

Rent day: 0

Next period from: 01/11/2026

Service charge: 0.00

VAT on rent: Exempt

New Tenant... Start Tenancy Notice... End Tenancy... Change Rent... Letting Fee Charge Tenant... Rent Received... Print Lease Notice of Terms Save Close

Figure 19. The rent received and set against the invoices

"1,650.00 received from the tenant and set against their invoices." The payment pays off the oldest invoices first, and the tenant owes nothing.

Landlord statements

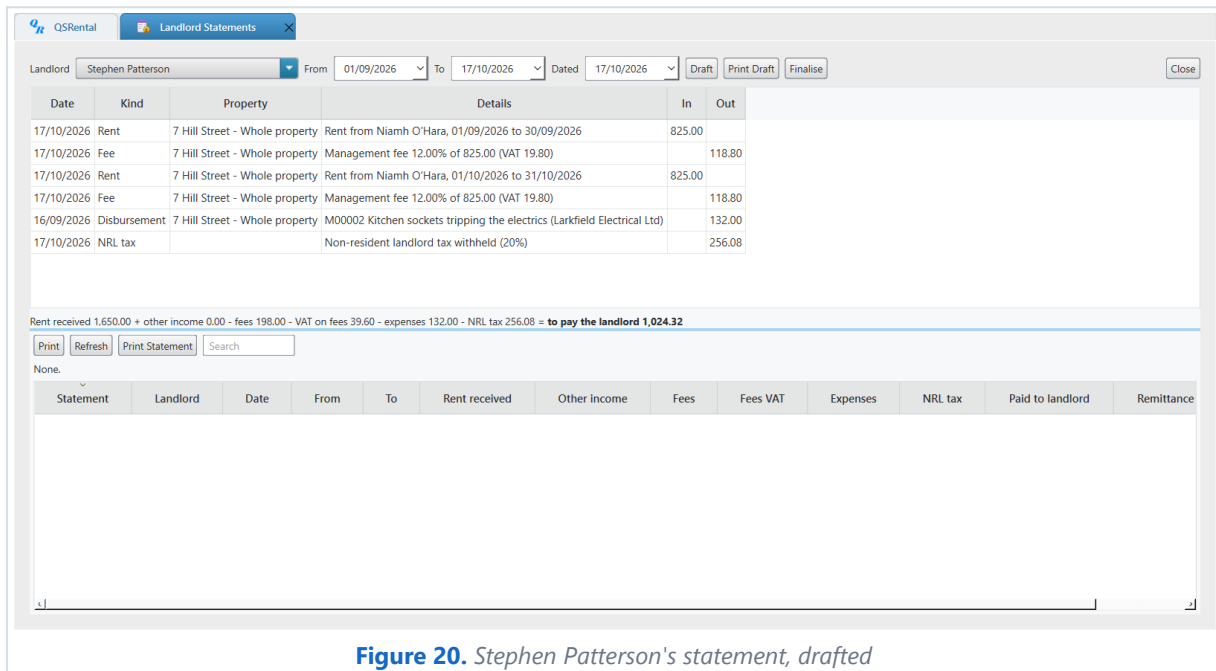
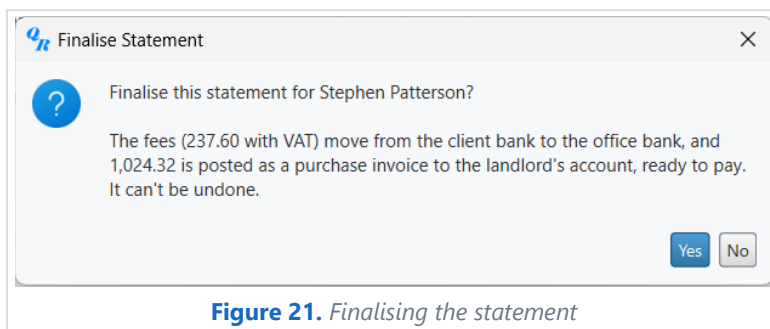


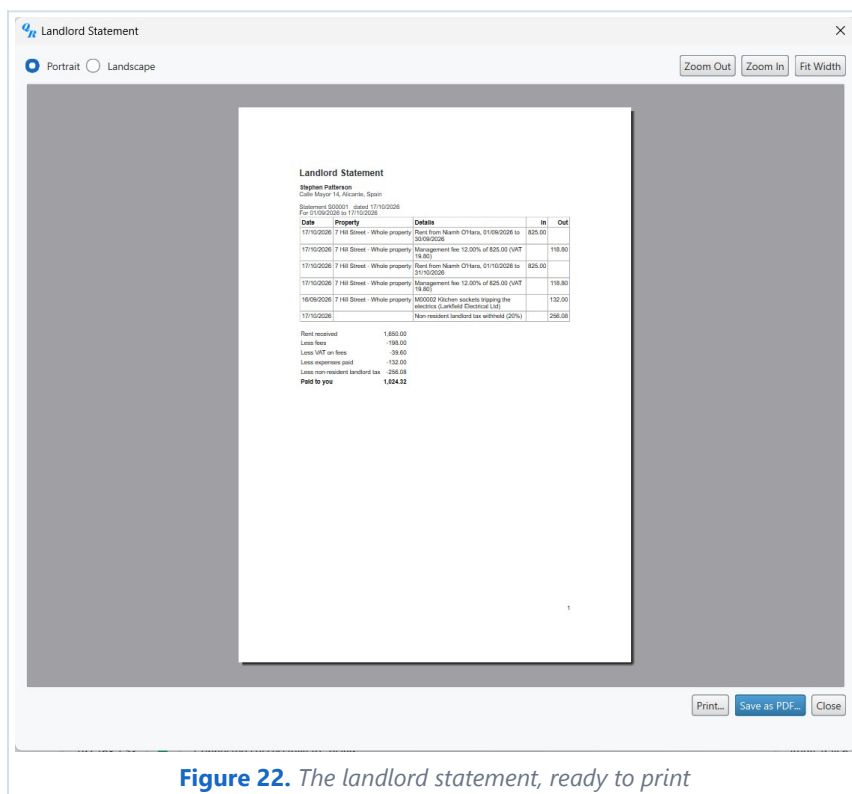
Figure 20. Stephen Patterson's statement, drafted

Open **Rental Management > Landlord Statements**, choose the landlord and the period, and press **Draft**. Every line is listed: the two months' **rent** (£825 each), the **management fee** on each (12%, £99, plus £19.80 VAT), the **disbursement** for the electrician's repair (£132), and the **NRL tax** kept back because he lives abroad (£256.08). The line underneath adds it up: rent received £1,650.00, less fees £198.00, VAT on fees £39.60, expenses £132.00 and NRL tax £256.08, **£1,024.32 to pay the landlord**.

	Amount
Rent received for Stephen Patterson	£1,650.00
less management fees, 12%	£198.00
less VAT on the fees	£39.60
less the electrician's repair	£132.00
less non-resident landlord tax, 20% of what is left	£256.08
To pay the landlord	£1,024.32



When it is right, press **Finalise** and answer **Yes**. QuiSuite records the statement so no line can go on another, moves the fees from the client account to the office account, keeps the NRL tax back for HMRC, and posts the £1,024.32 to the landlord's supplier account, ready to pay.



The statement opens ready to **Print** or **Save as PDF** and send to the landlord.

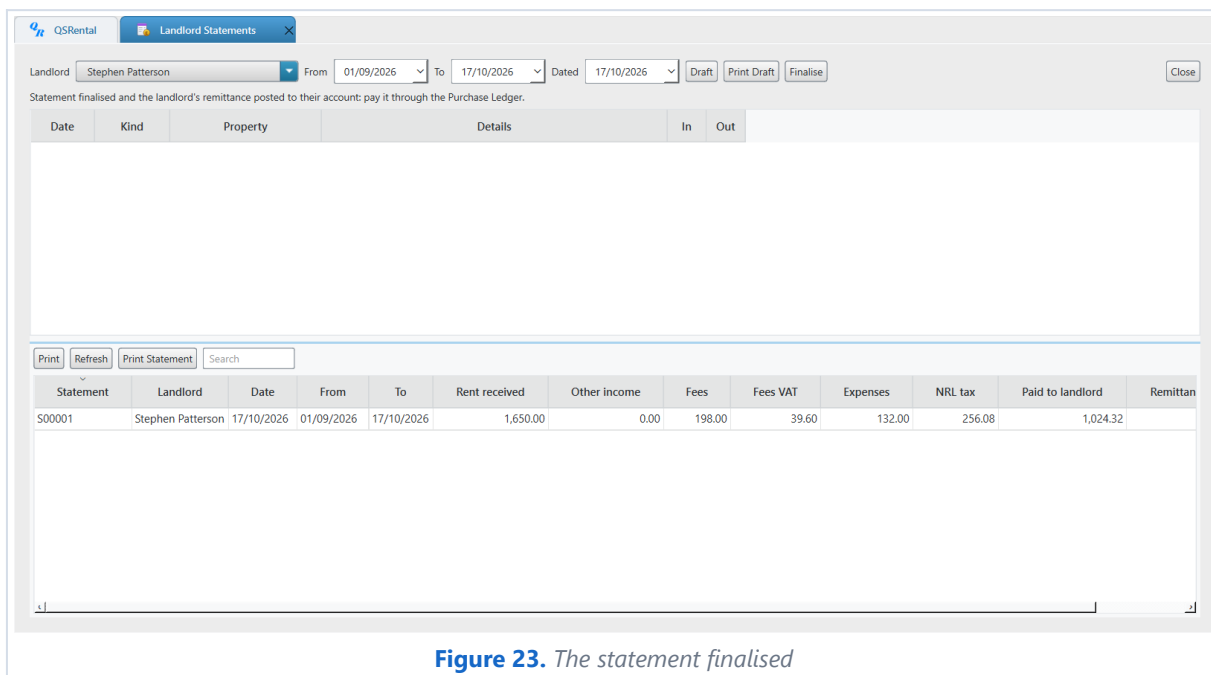


Figure 23. *The statement finalised*

The statement (S00001) is listed at the bottom with its figures. Pay the landlord in the **Purchase Ledger** (one of the accounting menus) like any supplier.

QR Maintenance, safety and inspections

Maintenance

Job	Reported	Property	Unit	What	Category	Priority	Status	Contractor	Target	Completed	Cost	VAT	Location
M00003	15/10/2026	7 Hill Street	Whole property	No hot water	Heating and gas	Urgent	Instructed	Greystone Heating Services	17/10/2026		0.00	0.00	Lanc
M00001	02/10/2026	14 Castle Street	Ground floor flat	Dripping kitchen tap	Plumbing	Routine	Instructed	Greystone Heating Services	09/10/2026		0.00	0.00	Lanc

Figure 24. Maintenance jobs

Rental Management > Maintenance lists the repairs: who reported them, the priority, the contractor and how far each has got. **Open jobs only** hides the finished ones.

Job

Communications

The job

Reference

M00003

Property

P0003 7 Hill Street

Unit

7 Hill Street - Whole property

Tenancy

T00003 Niamh O'Hara (Whole property, 7 Hill Street)

Reported

15/10/2026

Reported by

Tenant

Category

Heating and gas

Priority

Urgent

What

No hot water

Details

The oil boiler fires but the water stays cold.

Contractor and cost

Contractor

Greystone Heating Services (Heating and gas) *

Status

Instructed

Quote

0.00

Landlord approved

Instructed

15/10/2026

Target

17/10/2026

Completed

Cost (net)

0.00

VAT

0.00

Paid by

Landlord

Their invoice

What was done

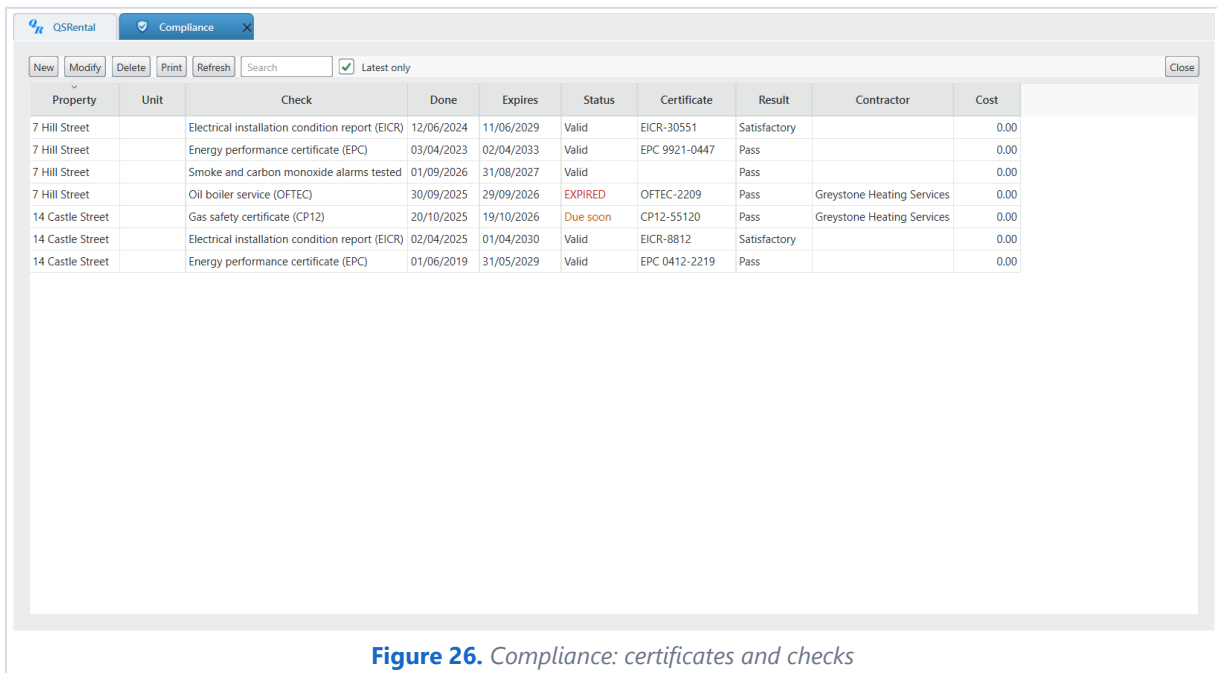
Raise Contractor Invoice

Save Close

Figure 25. A maintenance job

A job holds what is wrong, the **contractor**, the quote, when the landlord approved it, when it was instructed and finished, the **cost**, and who **pays**: the landlord (it goes on their statement), the agency, the tenant (recharged) or insurance. When the contractor's bill comes in, enter it and press **Raise Contractor Invoice**: it is posted to the contractor's account, ready to pay.

Compliance



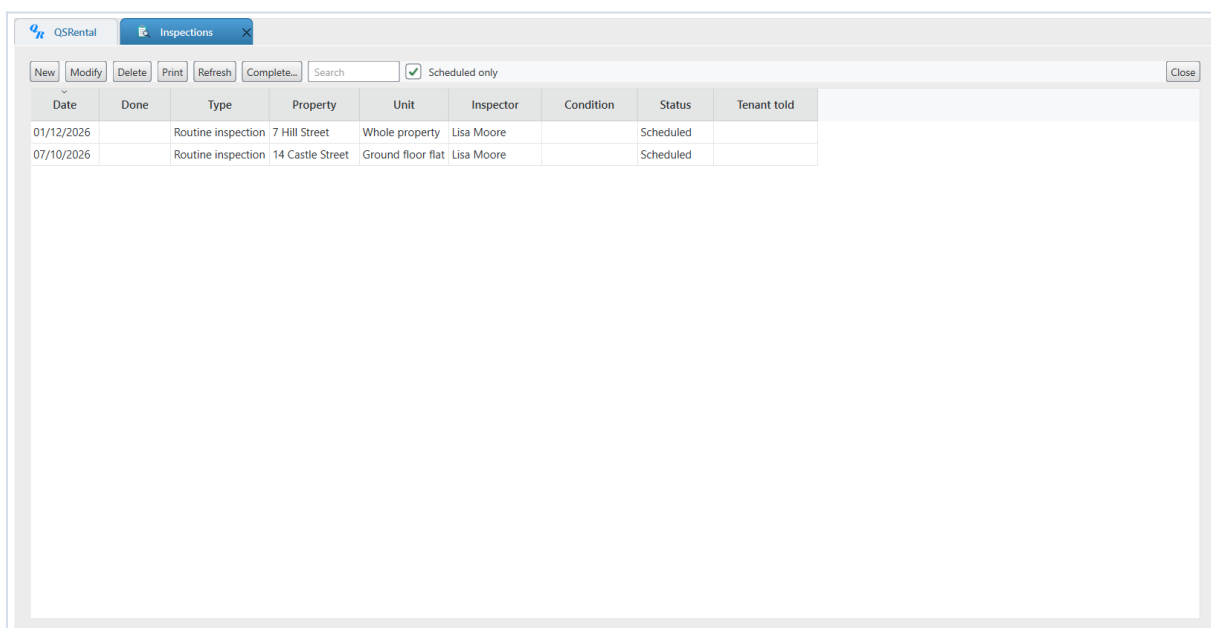
The screenshot shows the 'Compliance' section of the QuiSuite software. It features a table with columns for Property, Unit, Check, Done, Expires, Status, Certificate, Result, Contractor, and Cost. The table lists several safety certificates and checks for properties at 7 Hill Street and 14 Castle Street. Notable entries include an expired oil boiler service at 7 Hill Street and a gas safety certificate at 14 Castle Street that is due soon.

Property	Unit	Check	Done	Expires	Status	Certificate	Result	Contractor	Cost
7 Hill Street		Electrical installation condition report (EICR)	12/06/2024	11/06/2029	Valid	EICR-30551	Satisfactory		0.00
7 Hill Street		Energy performance certificate (EPC)	03/04/2023	02/04/2033	Valid	EPC 9921-0447	Pass		0.00
7 Hill Street		Smoke and carbon monoxide alarms tested	01/09/2026	31/08/2027	Valid		Pass		0.00
7 Hill Street		Oil boiler service (OFTEC)	30/09/2025	29/09/2026	EXPIRED	OFTEC-2209	Pass	Greystone Heating Services	0.00
14 Castle Street		Gas safety certificate (CP12)	20/10/2025	19/10/2026	Due soon	CP12-55120	Pass	Greystone Heating Services	0.00
14 Castle Street		Electrical installation condition report (EICR)	02/04/2025	01/04/2030	Valid	EICR-8812	Satisfactory		0.00
14 Castle Street		Energy performance certificate (EPC)	01/06/2019	31/05/2029	Valid	EPC 0412-2219	Pass		0.00

Figure 26. Compliance: certificates and checks

Rental Management > Compliance lists every safety certificate and check for every property, with its expiry and status: the oil boiler service at 7 Hill Street has **EXPIRED**, and the gas safety certificate at 14 Castle Street is **due soon**. QuiSuite knows how often each one must be renewed, and the dashboard shows the problems every day.

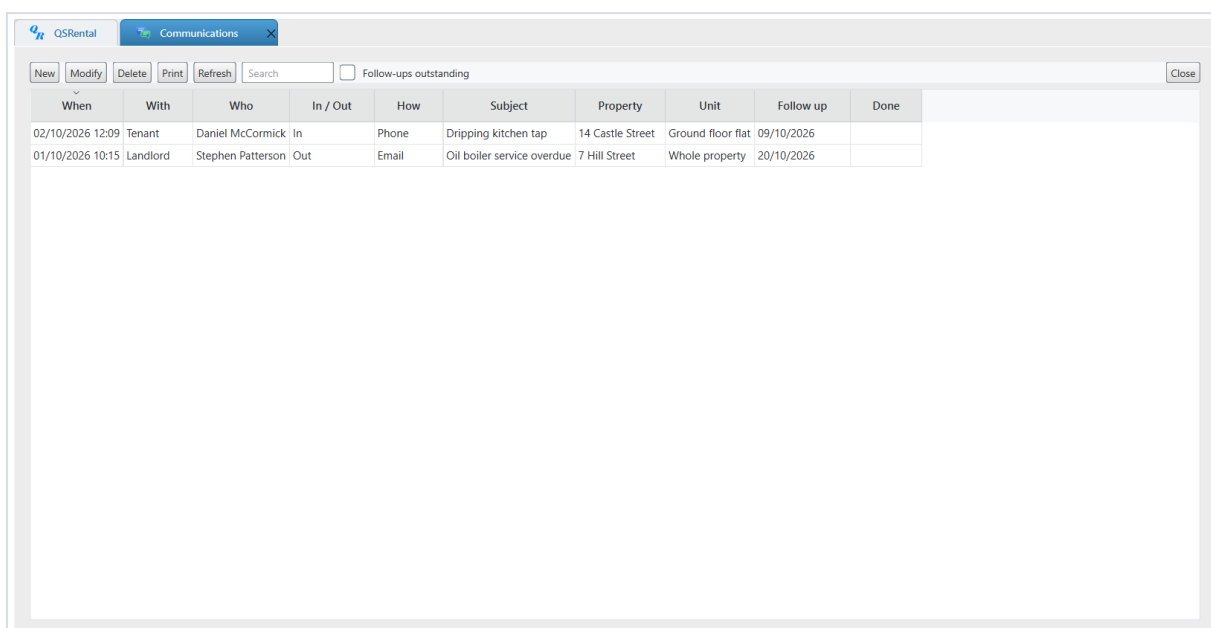
Inspections, communications and deposits



Date	Done	Type	Property	Unit	Inspector	Condition	Status	Tenant told
01/12/2026		Routine inspection	7 Hill Street	Whole property	Lisa Moore		Scheduled	
07/10/2026		Routine inspection	14 Castle Street	Ground floor flat	Lisa Moore		Scheduled	

Figure 27. Inspections

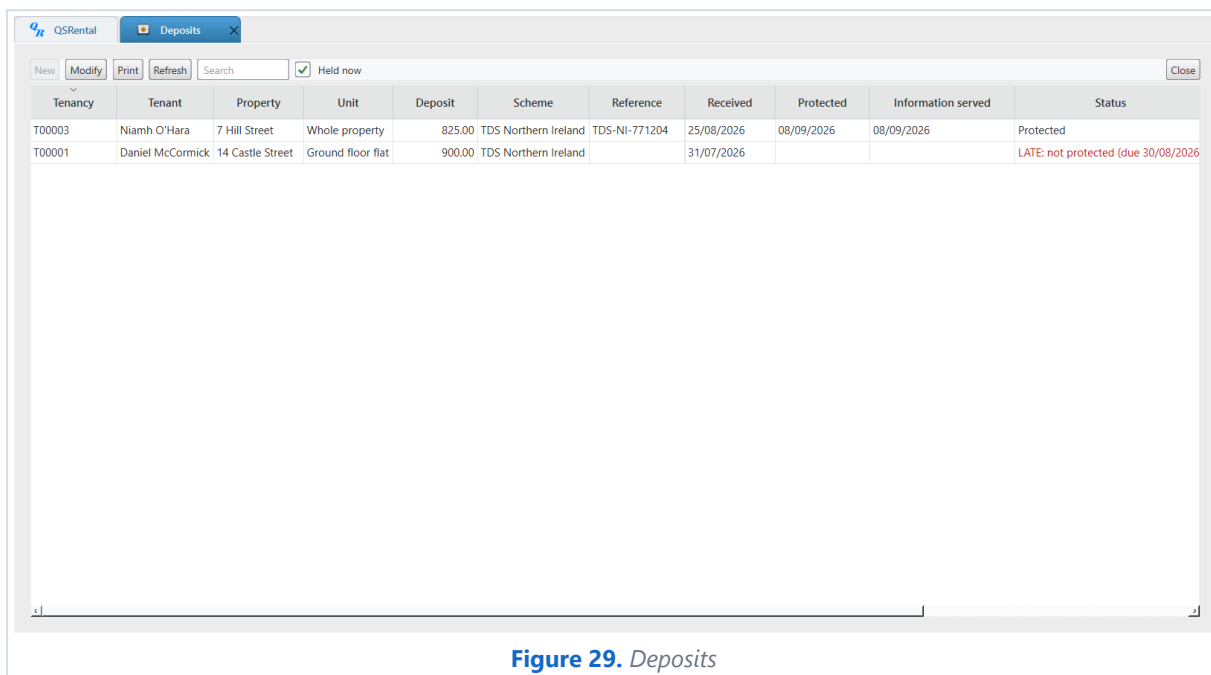
Rental Management > Inspections lists the inspections booked: QuiSuite books the next routine one automatically when one is completed (every 3 months here).



When	With	Who	In / Out	How	Subject	Property	Unit	Follow up	Done
02/10/2026 12:09	Tenant	Daniel McCormick	In	Phone	Dripping kitchen tap	14 Castle Street	Ground floor flat	09/10/2026	
01/10/2026 10:15	Landlord	Stephen Patterson	Out	Email	Oil boiler service overdue	7 Hill Street	Whole property	20/10/2026	

Figure 28. Communications

Rental Management > Communications is the log of every call, email and letter with tenants, landlords and contractors, with a **follow-up** date so nothing is forgotten.

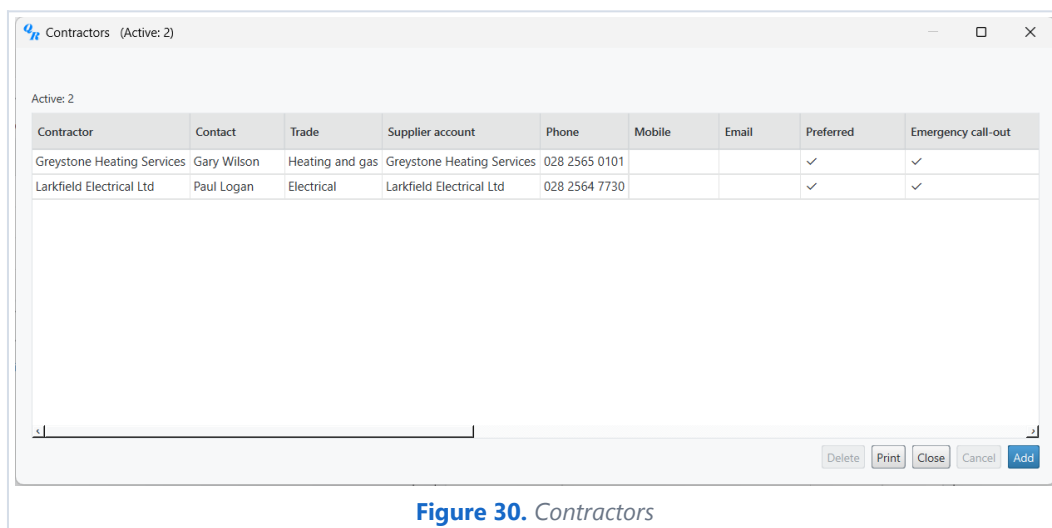


The screenshot shows the 'Deposits' window in the QuiSuite software. It features a table with columns for Tenancy, Tenant, Property, Unit, Deposit, Scheme, Reference, Received, Protected, Information served, and Status. Two rows are visible: one for Niamh O'Hara (Protected) and one for Daniel McCormick (LATE: not protected due 30/08/2026). The interface includes buttons for New, Modify, Print, Refresh, and a search bar.

Tenancy	Tenant	Property	Unit	Deposit	Scheme	Reference	Received	Protected	Information served	Status
T00003	Niamh O'Hara	7 Hill Street	Whole property	825.00	TDS Northern Ireland	TDS-NI-771204	25/08/2026	08/09/2026	08/09/2026	Protected
T00001	Daniel McCormick	14 Castle Street	Ground floor flat	900.00	TDS Northern Ireland		31/07/2026			LATE: not protected (due 30/08/2026)

Figure 29. Deposits

Rental Management > Deposits lists every deposit held and its protection: Niamh O'Hara's is **Protected**, but Daniel McCormick's shows "**LATE: not protected (due 30/08/2026)**". In Northern Ireland a deposit must be protected within 28 days: this one needs dealing with today.



The screenshot shows the 'Contractors' window in the QuiSuite software. It features a table with columns for Contractor, Contact, Trade, Supplier account, Phone, Mobile, Email, Preferred, and Emergency call-out. Two rows are visible: Greystone Heating Services and Larkfield Electrical Ltd. The interface includes buttons for Delete, Print, Close, Cancel, and Add.

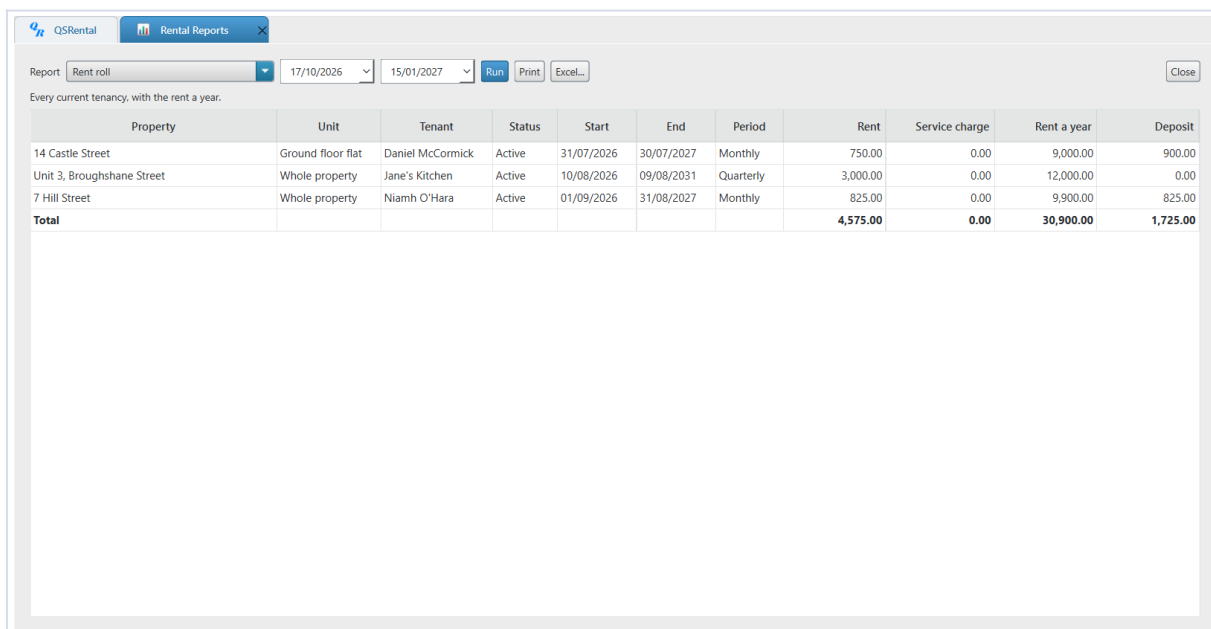
Contractor	Contact	Trade	Supplier account	Phone	Mobile	Email	Preferred	Emergency call-out
Greystone Heating Services	Gary Wilson	Heating and gas	Greystone Heating Services	028 2565 0101			✓	✓
Larkfield Electrical Ltd	Paul Logan	Electrical	Larkfield Electrical Ltd	028 2564 7730			✓	✓

Figure 30. Contractors

Rental Management > Contractors lists the trades you use, each with their trade, phone, supplier account, and whether they are preferred and take emergency call-outs.

Reports

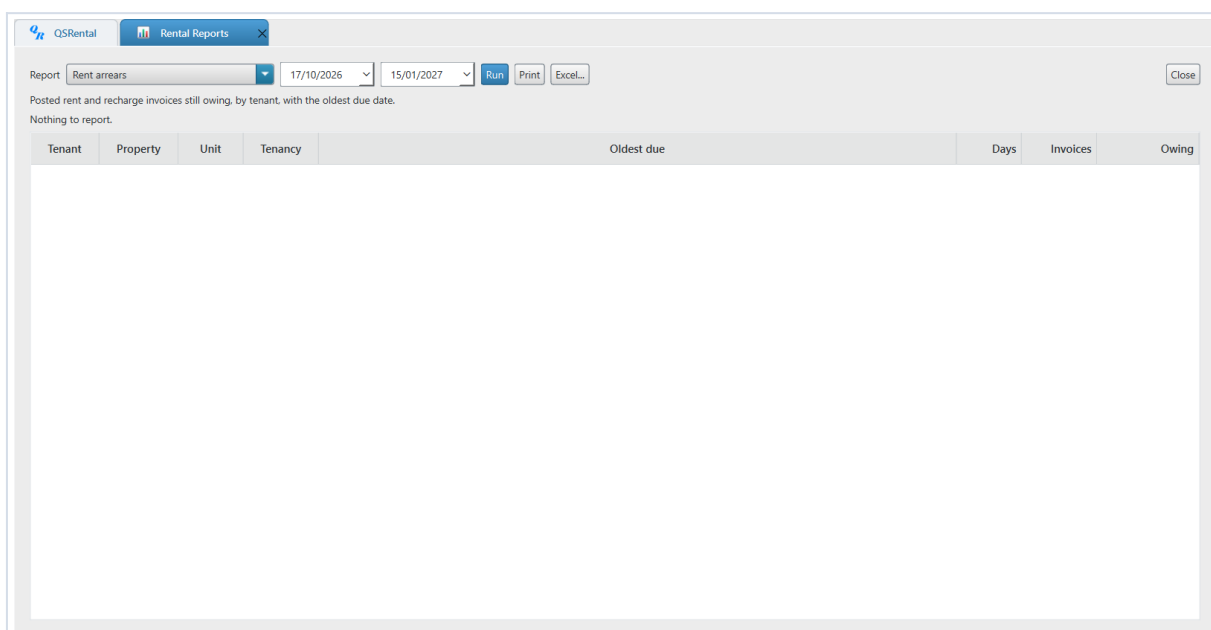
Open **Rental Management > Rental Reports**, choose a report and the dates, and press **Run**. **Print** prints it and **Excel...** saves it as a spreadsheet. There are ten; four are shown here.



Property	Unit	Tenant	Status	Start	End	Period	Rent	Service charge	Rent a year	Deposit
14 Castle Street	Ground floor flat	Daniel McCormick	Active	31/07/2026	30/07/2027	Monthly	750.00	0.00	9,000.00	900.00
Unit 3, Broughshane Street	Whole property	Jane's Kitchen	Active	10/08/2026	09/08/2031	Quarterly	3,000.00	0.00	12,000.00	0.00
7 Hill Street	Whole property	Niamh O'Hara	Active	01/09/2026	31/08/2027	Monthly	825.00	0.00	9,900.00	825.00
Total							4,575.00	0.00	30,900.00	1,725.00

Figure 31. *Rent roll*

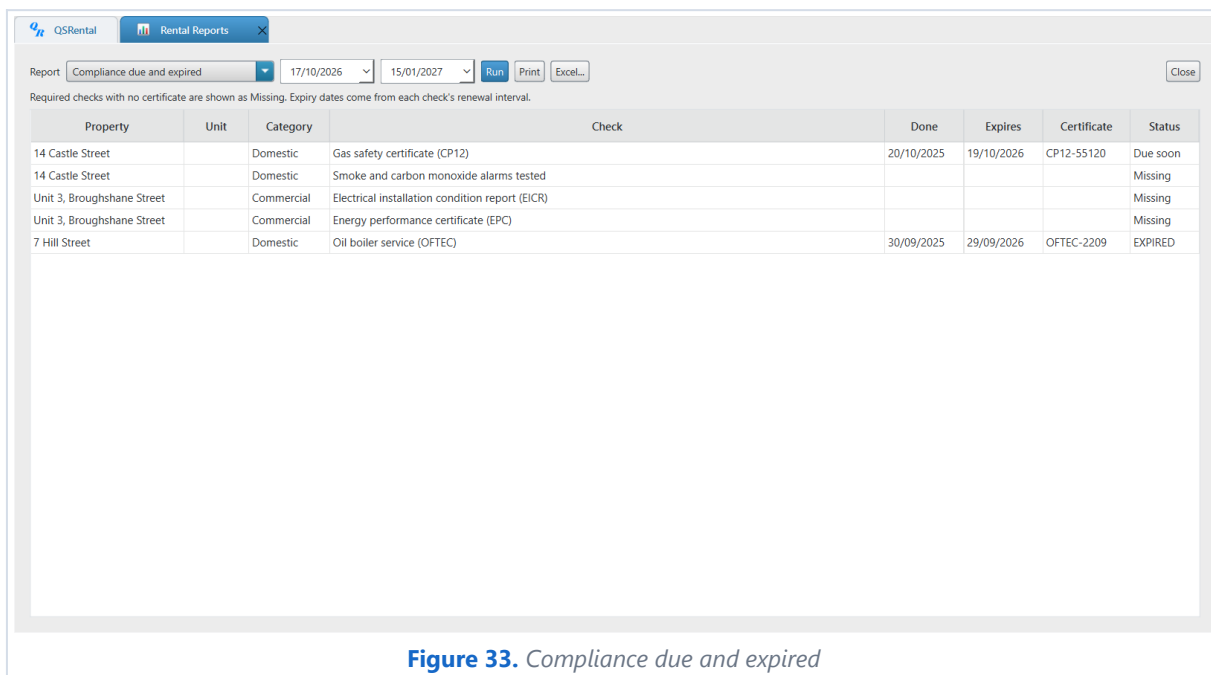
Rent roll: every current tenancy with its rent and deposit: three tenancies, £30,900 of rent a year.



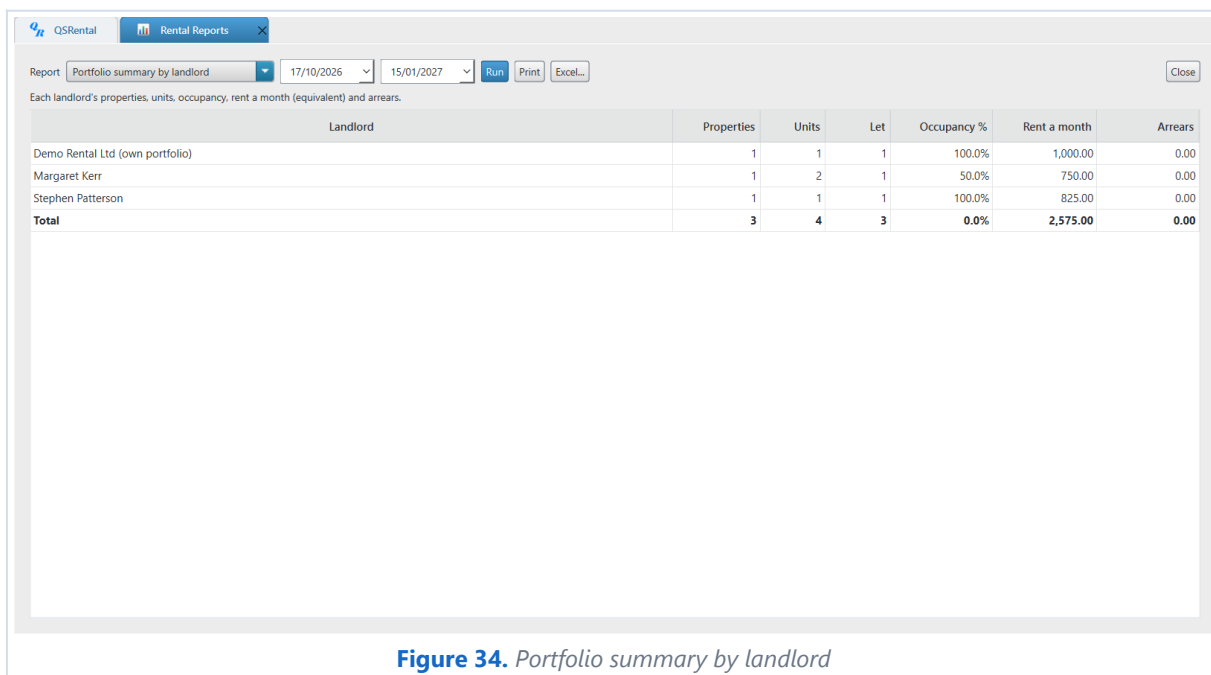
Tenant	Property	Unit	Tenancy	Oldest due	Days	Invoices	Owing

Figure 32. *Rent arrears*

Rent arrears: tenants with rent still owing, oldest first. Here, nothing: everyone has paid.



Compliance due and expired: the certificates to renew, and the checks with no certificate at all.



Portfolio summary by landlord: each landlord's properties, units, how many are let, and the rent a month. The others cover vacancies and voids, lease events, inspections due, open maintenance, the deposit register, and rent invoiced and received by property.

The dashboard afterwards

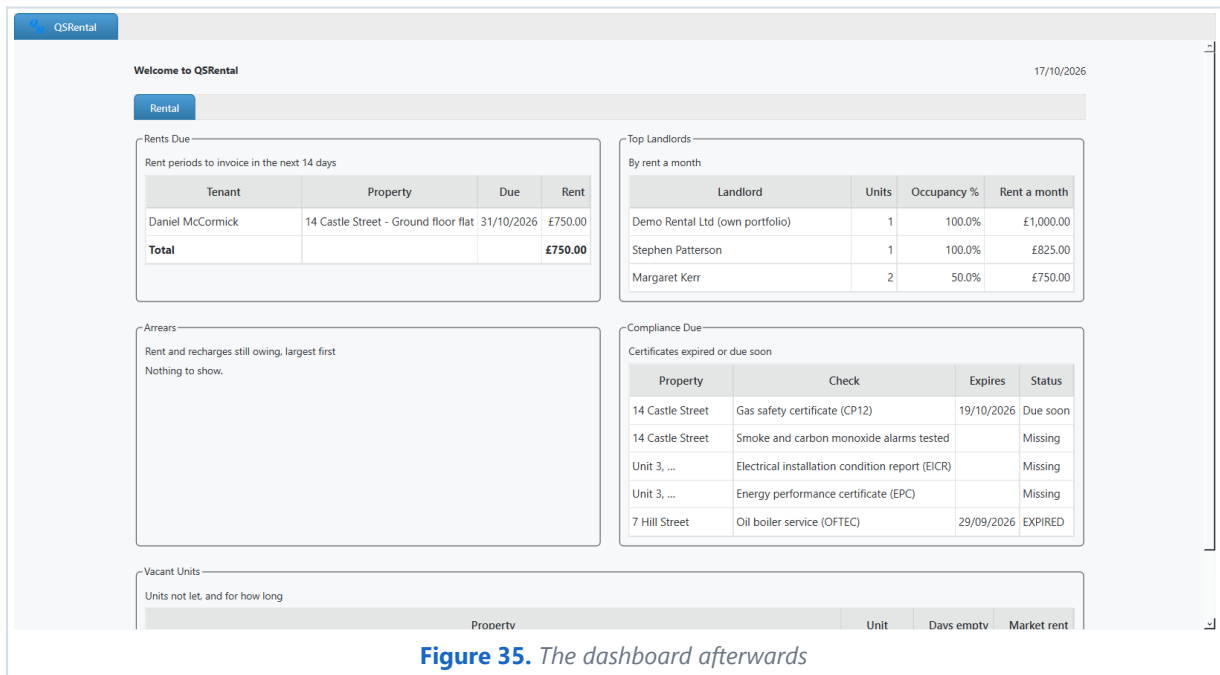


Figure 35. The dashboard afterwards

Rents Due now shows only the next rent due (Daniel McCormick's, at the end of the month), **Arrears** is empty, and **Compliance Due** still flags the expired boiler service and the missing certificates: the next jobs to do.

QR Quick reference

The agent's month

1. In **Rental Management > Raise Rent Charges**, raise the rent due.
2. As each tenant pays, open their tenancy and press **Rent Received...**
3. Run **Rent arrears** and chase what is still owing.
4. Make each landlord's statement: **Draft**, check it, **Finalise**, and send it.
5. Pay the landlords and contractors in the Purchase Ledger.
6. Check the dashboard's **Compliance Due** and the **Deposits** list.

Try it yourself on the test drive

1. Let the empty first floor flat at 14 Castle Street: make a new tenancy, then **Start Tenancy**.
2. Raise its first month's rent, then record it as received.
3. Record a new gas safety certificate for 14 Castle Street and watch the dashboard change.
4. Draft Margaret Kerr's statement for this month.