

Entering a new Owner

Click on Owner (Left hand side) Click on Add owner
A blank screen will come up

Start by entering all the contact details for the owner. If a Trust or a Company, we suggest that you put the full name of the trust etc in the full name area.

Click on the Financial Tab. Enter information about the statements, pick the payment setup i.e when and how you are going to pay the owner

Do NOT change the system bank account. Subscription media is how the owner wants to receive letters or newsletters

Click on the Options Tab, Enter in the Property Managers name if not you.

Fill in the other selections. (For more detailed information on the meaning of the fields please check out the Help File

When finished click on Save and Close. (Top Right)
If you are paying the owner by Direct Credit, a box will pop up to remind you to enter a bank account

Click on OK and it will take you to the bank account screen. Click on Create New. Enter in the details.

Account Number is just straight numbers no gaps or dashes. Fill in the other party details as that is what the owner will see on their bank statement - Save Changes.

Now you can enter the Property