PM

SL Property Manager

Rental property, lease & tenant management for WordPress

Version 0.76.1 | WordPress Plugin Reference Manual

Streamline Diving — Internal Plugin Documentation

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1. Overview

1a. What This Plugin Does

SL Property Manager is a rental property management system built into WordPress. It tracks properties and their units, public website listings, rental applications, leases, rent and fee payments (including online card/bank/PayPal payments, in full or in installments), landlord expenses/receipts, maintenance work orders, tenant onboarding, move-in inspection checklists, lease amendments, bulk tenant emails, bank loans and personal funds invested in the business, a loan/cap-rate calculator, a key register, and detailed per-property info — and it can email a large library of built-in and custom reports on a schedule.

The plugin deliberately does **not** use WooCommerce. Tenant payments go through direct Stripe and PayPal integrations instead, because there are no products being sold here — just rent, fees, deposits, and the occasional recurring charge.

> **Everything happens on one page.** Unlike most Streamline plugins, wp-admin is not where you manage anything day-to-day. The entire application — including its own Settings screen — lives at a single front-of-site web address called the **Access URL** (Section 2). wp-admin can also render that exact same dashboard directly as a built-in fallback (Section 2d) — but the Access URL remains the normal, everyday way in for staff and tenants.

1b. How It's Built (Access URL Pattern)

This plugin mirrors the same pattern already used by SL POS: a single-page application (plain React, no build step) is served at a configurable front-end web address, delivered through a small PHP snippet installed via the Code Snippets plugin rather than the property manager plugin's own files being directly web-visible. This is why installation has an extra step beyond the usual "upload and activate" (Section 2c).

Two separate account systems can sign in at the Access URL:

- **Staff Logins and Tenant Logins** — plugin-owned username/password accounts, not WordPress accounts, managed under Settings → Staff Logins and Settings → Tenant Logins (Sections 20b and 20c). Both groups log in the same way and never touch a WordPress login page at all. The same sign-in card can also be pasted onto any page of your public website (Section 3f).
- **WordPress accounts** — a real WordPress Administrator or Shop Manager gets full dashboard access automatically, with no separate setup.

A third, independent permission system — twelve granular capabilities like "Manage Leases" or "Manage Investments" — applies specifically to Staff Login accounts, so you can give a front-desk employee narrower access than a property manager without touching WordPress roles at all. A staff account can also be narrowed further to only certain report types or certain Settings tabs. See Section 21 for the full reference.

> **Tenants no longer use WordPress accounts.** Earlier versions of this plugin created a real WordPress account (the `pm_tenant` role) for every invited tenant. Tenants now log in the plugin-owned way instead — the same model Staff Logins already used. A tenant invited under the old system still has a working WordPress login as a fallback, but needs to be re-invited once (Section 13b) to get the new kind of login.

2. Installation & Setup

2a. What You Need First

> **The Code Snippets plugin is required.** SL Property Manager's actual application page is delivered by a PHP snippet that you install through the free **Code Snippets** plugin (available in the WordPress plugin directory), not by the SL Property Manager plugin files being visited directly. Install and activate Code Snippets before continuing.

2b. Installing the Plugin

1. Upload the SL Property Manager plugin zip in wp-admin under **Plugins → Add New → Upload Plugin**, then click **Activate**.
2. Activation automatically creates the plugin's database tables, a `pm_staff` role and a `pm_tenant` role (kept only for any accounts created under the old system, Section 1b), and a default seeded Staff Login (Section 2e).
3. Every plugin update also re-grants the latest set of Property Manager capabilities to any existing WordPress Administrator/Shop Manager account automatically — a newly added capability reaches those accounts without a deactivate/reactivate cycle.

2c. Adding the Frontend Access Snippet

The snippet's code is copyable directly from inside the dashboard itself, so there's no separate reference document to track down:

1. In wp-admin, go to **Snippets → Add New** (from the Code Snippets plugin), and name it "SL Property Manager - Frontend Access".
2. In the dashboard (reachable via the wp-admin fallback below if you haven't installed the snippet yet), go to **Settings → General** and click **Copy Code Snippet**, then paste it into the snippet's code box.
3. Save the snippet and make sure it's set to **Active**.
4. Go to **Settings → Permalinks** in wp-admin and click **Save Changes** once, to flush WordPress's rewrite rules so the new Access URL address starts working.
5. Visit `https://yoursite.com/property-manager/` (the default address — see Section 20a to change it).

> **If you use a reCAPTCHA plugin** that protects the standard WordPress login form (for example, Advanced Google reCAPTCHA), you don't need to worry about it for this plugin — both Staff and Tenant logins are a custom form that never touches the WordPress login page or triggers that reCAPTCHA check at all.

2d. The wp-admin Fallback Dashboard

A WordPress Administrator can always reach the full dashboard — the same one at the Access URL, including its Settings tab — directly from inside wp-admin, with no Access URL, Code Snippets install, or plugin-owned login involved:

- **Property Manager** in the wp-admin menu opens the dashboard on its Dashboard tab.
- **Property Manager → Settings** opens the same dashboard straight on its Settings tab.

> **This is a guaranteed way in, not a second system to maintain.** It's the exact same React app and the exact same data as the Access URL — authenticated with your normal WordPress Administrator session instead of a plugin-owned login. Use it any time the Access URL page, its rewrite rules, or the Code Snippets install are ever broken or unreachable. Day to day, staff and tenants should still use the Access URL — this fallback requires a real WordPress Administrator account, which Staff Logins and Tenant Logins exist specifically to avoid needing.

2e. First Visit & Default Staff Login

On first activation, one Staff Login account is seeded automatically so you can get in immediately:

Username	Password	Role
`admin`	`admin`	Admin (all twelve permissions)

> **Change this password immediately after install.** Staff Login passwords are stored in plain text (Section 20b) — the same trade-off SL POS makes for the same reason (so a device that has never touched WordPress can still log in with something as simple as a shared employee PIN). Go to Settings → Staff Logins as soon as you're in and set a real password, or turn on password requirements under Settings → Login Security (Section 20d) so a weak one can't be saved in the first place.

> **Before you start loading in real data,** turn on **Settings → General → Turn off ALL email notifications** (Section 20a) — it keeps every automated notice (rent reminders, late notices, work order alerts, checklist/amendment notices, scheduled reports) from going out to real tenants and staff while you set things up and run the Import/Export tools (Section 20p).

3. Signing In

The Access URL shows a landing page with a chooser between Staff (Landlord) Login and Tenant Login, plus a WordPress-account path that bypasses the chooser entirely if you're already logged into WordPress as an Administrator.

> **As of version 0.67.0, Staff and Tenant login passwords are stored scrambled** (WordPress password hashing) instead of as plain text. Existing passwords were converted automatically when this update was installed and keep working — nobody needs to change theirs.

> **Fixed in 0.66.0 — a cached Access URL page could show "Cookie check failed."** Some caching plugins/hosts (LiteSpeed Cache, for one) could serve a saved copy of the Access URL page with an expired security code, blocking sign-in for anyone not already logged into WordPress. The Access URL page is no longer cached, and this self-corrects on its own — there's nothing to configure.

3a. Staff Login

1. On the Access URL landing page, choose the **Landlord Login** tab.
2. Enter the username (or email) and password for a Staff Login account (Section 20b).
3. If Email Verification is turned on for Staff (Section 3d), enter the 6-digit code emailed to that account before continuing.
4. The session is a bearer token stored in the browser (valid 24 hours), sent on every request as the `X-PM-Employee-Token` header — there's no WordPress cookie involved for this path at all.

3b. Tenant Login

A tenant signs in on the Access URL's **Tenant Login** tab with a plugin-owned username (or email) and password — the same kind of login Staff Logins use, set up the first time they're invited (Section 13b). This is **not** a WordPress account: it's a row directly on that tenant's own lease record, with its own session (sent as the `X-PM-Tenant-Token` header) completely separate from WordPress.

Once in, a tenant sees a stripped-down, self-service **My Account** view with two tabs: **My Lease** (documents, payments and Pay Now — including partial online payments and, if staff have turned it on, AutoPay — Sections 8i, 8j — and the ability to submit a maintenance work order, fill out an inspection checklist, or sign a lease amendment when one is pending) and **Contact Info** (their own name, email, phone numbers, and address, plus a way to request a password change — Section 3e) — never any other tenant's data, and never the staff dashboard. If staff have turned it on, a **Renters Insurance** card also appears on the tenant's Overview, pointing them to a quote (Section 20h), and a **rent payment reporting** card asks the tenant to acknowledge or opt into reporting their rent to the credit bureaus (Section 20i).

> **A household can now share one login.** If more than one tenant on the same lease was set up with the same email address, that login tries the entered password against every tenant row sharing that email and signs in as whichever one it matches — so roommates or spouses sharing a mailbox can still each have their own password without a login conflict.

> **Invited under the old system?** A tenant whose account predates the plugin-owned tenant login can still sign in with their old WordPress login as a fallback, but won't have a plugin-owned login until re-invited once (Section 13b). After that, the Tenant Login tab is what they use going forward.

3c. WordPress Administrator Access

A WordPress Administrator or Shop Manager always has full access automatically, with no separate setup — both roles are granted all twelve Property Manager capabilities on plugin activation (and kept current on every update, Section 2b). There are two ways in with a WordPress account:

- At the Access URL, on the landing page's WordPress-account tab (or by already being logged into wp-admin in the same browser) — the dashboard opens directly, no chooser shown.
- Directly inside wp-admin, under **Property Manager** (Section 2d) — useful any time the Access URL itself isn't working.

> **A WordPress user with neither role is turned away.** If someone is logged into WordPress but has no Property Manager access at all (an ordinary Subscriber, for example), visiting the Access URL shows an "Access Denied" page rather than the staff/tenant chooser.

3d. Email Verification & Remember This Device

If turned on under Settings → Login Security (Section 20d), a Staff or Tenant login (separately configurable for each) adds a second step after the password: a 6-digit code is emailed to that account, valid for 10 minutes, which must be entered to finish logging in.

1. Enter username/email and password as usual.
2. Check your email for the 6-digit code, and enter it on the verification screen.
3. Optionally check **Remember this device for 10 days** (only shown if Settings → Login Security has this turned on) so the same browser isn't asked for a code again until that remembered period expires.

> **A login code still sends even while automated emails are paused.** Turning on the master "Turn off ALL email notifications" switch (Section 8k, Section 20a) only blocks the plugin's own automated notices — it never blocks a verification code, a password reset, or an invite someone on staff clicks to send.

> **The "remember this device" setting has two layers.** Settings → Login Security's own checkbox controls whether the option is offered *at all*; the person logging in then separately chooses whether to actually use it for their device, each time they're asked for a code. Turning the setting off hides the

checkbox going forward but doesn't un-remember a device that was already remembered under an already-issued token.

3e. Forgot / Change Password

Both Staff and Tenant logins share the same reset mechanics, entirely separate from WordPress's own password system:

- **From the login screen ("Forgot password?")** — emails a one-hour setup/reset link to the email address on file for that account. The same generic response is shown whether or not the entered username/email actually matches an account, so this can't be used to test which logins exist.
- **From a tenant's own account** — the Contact Info tab's **Change Password** button (Section 3b) sends that same one-hour link to the tenant's own email, without anyone needing to go through the login screen.
- **Set directly by staff** — Settings → Staff Logins and Settings → Tenant Logins (Sections 20b, 20c) both have a **Set Password** action that sets a new password immediately, no email involved.

Any new password set through any of these paths must satisfy the password requirements configured under Settings → Login Security (Section 20d), if any are turned on. Password-reset and login-verification emails always go out, even while the master email-pause switch (Section 8k) is on.

3f. Login Cards on Your Website

New. The Access URL's own sign-in screen and any sign-in box you paste onto your website are now the same reusable "login card," so a visitor can sign in from your home page, a dedicated login page, or anywhere else without first finding the Access URL. Three ready-made cards are available from Settings → General (Section 20a):

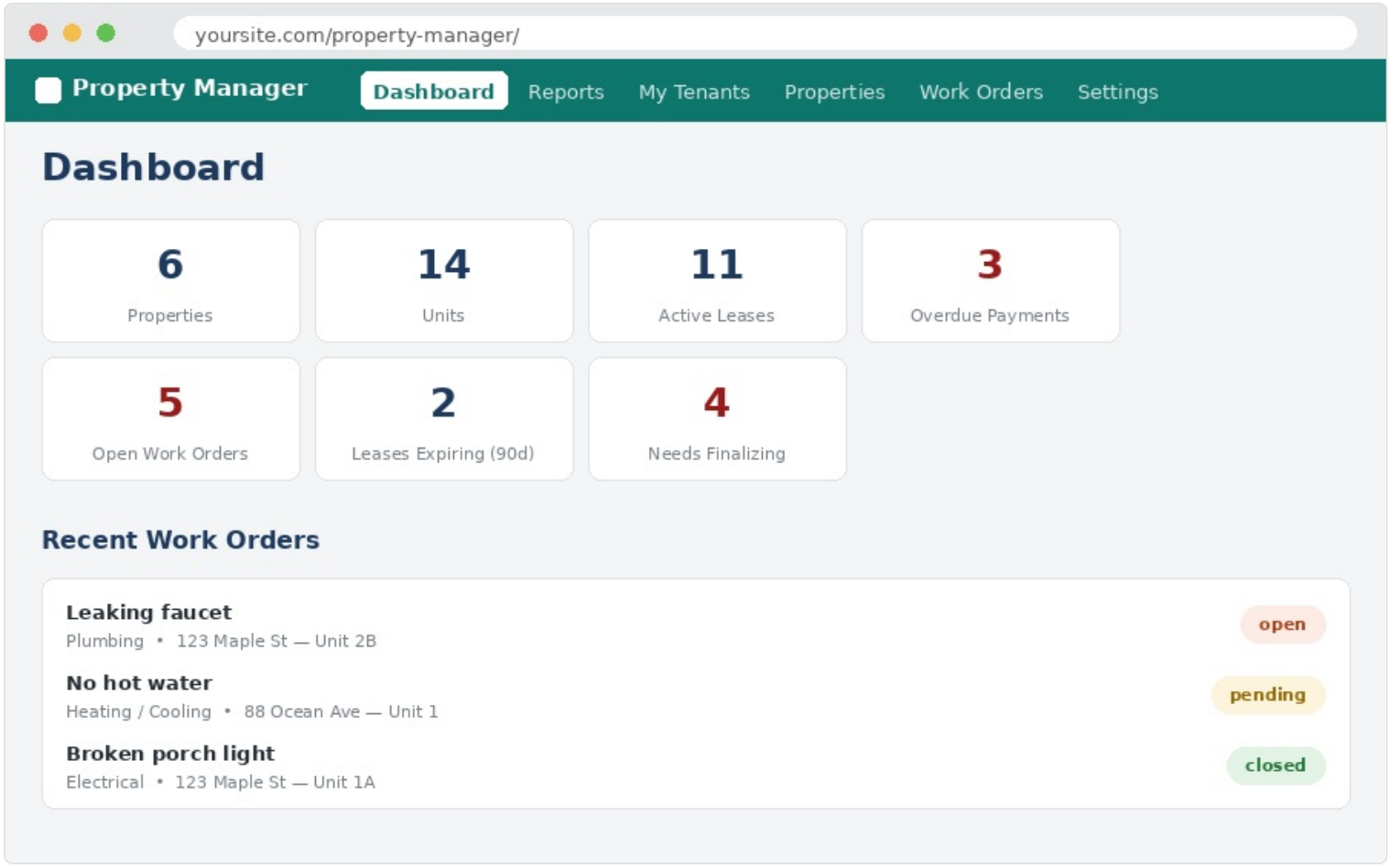
Card	Shows
Full login card	Tenant Login and Landlord Login buttons together, so one card serves everyone.
Tenant login card	Tenant sign-in only.
Landlord (Staff) login card	Landlord/staff sign-in only.

Each is two lines of copy-paste HTML (a placeholder plus the card's script), pasted into an HTML block wherever it should appear — in Elementor, the "HTML" widget. A matching shortcode works the same way: `[sl_pm_login]`, `[sl_pm_login mode="tenant"]` or `[sl_pm_login mode="staff"]`, with `hide_new="1"` to hide that card's "New Here?" section. After signing in from any of these, the visitor is taken to the Access URL. All the cards share the colors, "New Here?" links, and Sign In button color saved once under Settings → General.

> **You can turn the Access URL's own login card off.** Settings → General has a "Show the login screen at the Access URL" switch; turned off, a signed-out visitor to the Access URL is sent to a page you choose instead (presumably one with a login card pasted on it) — useful if you'd rather people sign in from your own branded page. Adding `?pm_login=1` to the Access URL always shows the card regardless of this setting, as an escape hatch. Someone already signed in still reaches their dashboard at the Access URL either way.

4. Dashboard

The Dashboard is the landing tab after signing in. It's a fast, read-only snapshot of what needs attention — nothing here is editable directly; every card now opens a detail window, and every detail row links through to the section that manages it. The dashboard's look was restyled to match a friendlier, branded website feel (soft cards, a white header with icon tabs) rather than a plain database screen; no screen or feature moved as part of that restyle.



The Dashboard tab — summary cards, including the Needs Finalizing card, plus a Recent Work Orders list.

4a. The Summary Cards

New: a very large number on one of these cards (or on Invested's or a tenant's Overview stat cards) now shrinks to fit the card rather than overflowing or wrapping awkwardly, and re-checks itself if the window or card is resized.

Card	What It Counts
Properties	Active (non-archived) properties.
Units	Active units across all properties.
Active Leases	Leases with status "active."
Overdue Payments	Scheduled/pending/overdue payments whose due date has passed, plus the dollar total still owed across all of them (installment payments already recorded reduce this total — Section 8b).
Open Work Orders	Maintenance items with status "open" or "pending."
Leases Expiring (90d)	Active leases whose end date falls within the next 90 days.
Needs Finalizing	Submitted Apartment Inspection Checklists (Section 10) plus signed Lease Amendments (Section 11) that are still waiting on a staff member to review and finalize them.

4b. Click-Through Detail Windows

Clicking any summary card opens a detail window listing exactly what's behind that number — for example, clicking Needs Finalizing lists every awaiting checklist and amendment together, each row showing the item, property, unit, who signed or submitted it, and when, so staff can jump straight to the specific record instead of hunting for it across two different tabs. These detail lists use the same table as Reports, so every column can be sorted and a long cell can be opened to read in full (Section 19b).

4c. Recent Work Orders

The five most recently created work orders, newest first, each showing its title, kind, unit/property, and status badge. Click through to Work Orders (Section 12) to see the full list or change a status.

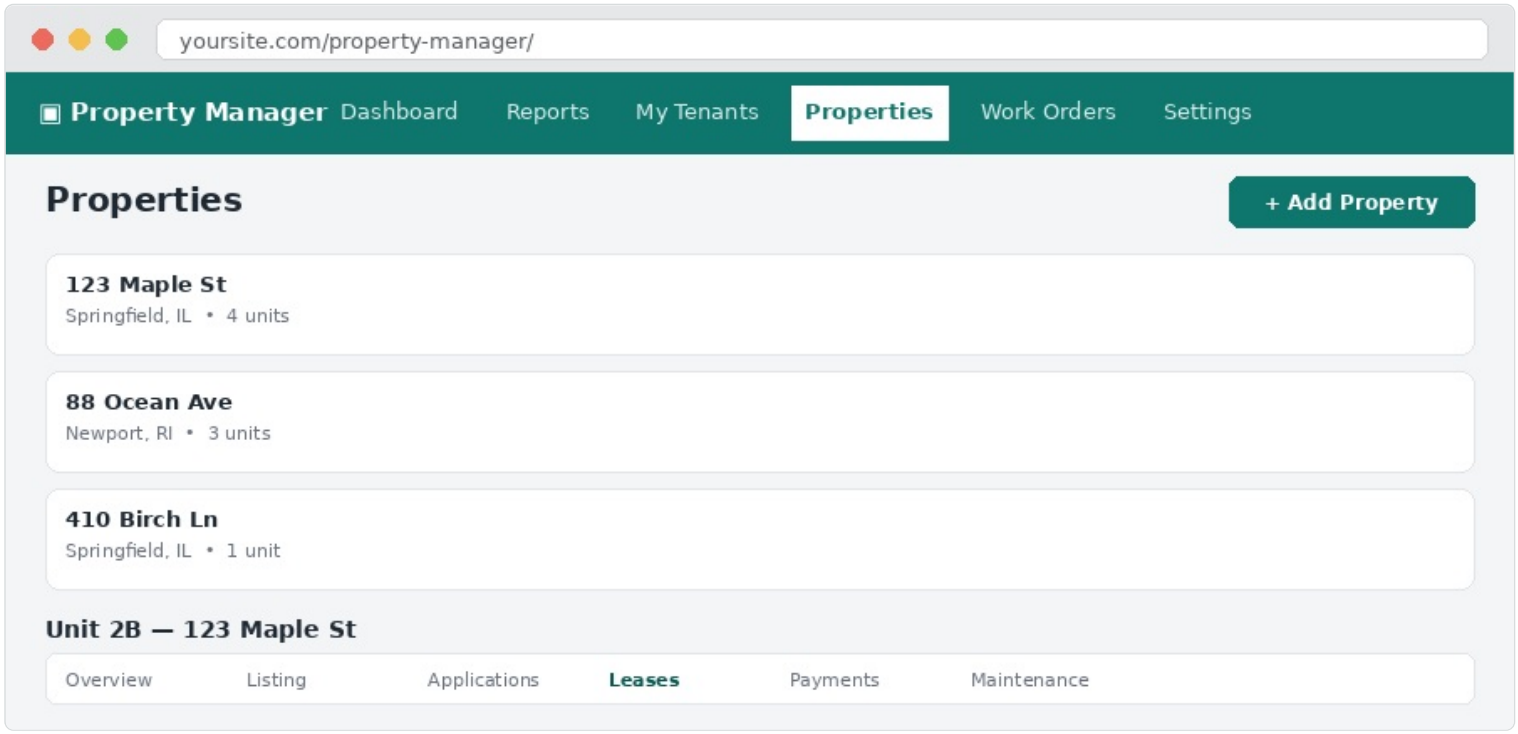
5. Properties & Units

5a. The Properties List

The Properties tab lists every active property as a card: address, unit count, and every current tenant living there, with their unit, phone number(s), and email right on the card, so staff can see who lives where without drilling into a specific unit or lease. Deleting a property doesn't actually remove it — it's archived (status set to "archived") so historical leases and payments tied to its units stay intact.

A property card's tenant list now reflects a lease's actual timing rather than just "active or not":

- A lease that hasn't started yet shows **"Lease starts {date}"** instead of appearing as a current tenant.
- A holdover tenant — a lease whose term has ended but who's still counted as living there (typically because month-to-month after term is on, Section 5h) — shows **"Lease term ended {date} — still active."**
- A tenant removed from the lease (Section 13d) no longer shows on the card at all.
- A unit with more than four tenants turns its tenant list into a scrollable sub-list, with a "{N} tenants — scroll to see all" count shown above it, so a crowded card doesn't grow without limit.



The Properties list, and a unit's tab strip (Overview / Leases / Payments / Maintenance).

5b. Adding a Property

1. Click **+ Add Property**.
2. Optionally pick **Start from a copy of** an existing property first (Section 5f).
3. Fill in a street address (required), title (optional, for your own reference), city, state, and zip.
4. Optionally fill in **Date Acquired** and **Purchase Price** — these feed the Real Estate Schedule and Property Profitability reports (Section 19a) and are also editable later from Property Info (Section 18). Purchase Price only shows for a staff account with the Property Info financial details permission (Section 21).
5. Optionally pick an **Owning Company** (Section 5c).
6. Save. The property appears in the list immediately.

5c. Owning Company

If a property is held under its own LLC or building name, pick it from the **Owning Company** dropdown on the property's form — the list of companies is managed under Settings → Property Ownership (Section 20e). Once set, automated emails about that property (rent reminders, late payments, failed payments, lease terminations — Section 8l) show that company's name, address, contact info, and logo instead of your site's own default branding, which matters most for a portfolio where different properties are held under different LLCs. A company from this list can also be given its own office or equipment keys (Section 17c).

> **Legacy company fields still work as a fallback.** Properties set up before the Property Ownership list existed may have their own free-text company name/address/phone/email/logo fields filled in directly on the property. Those are used only when no Owning Company is picked from the dropdown — picking a company from the list always takes priority.

5d. Units Within a Property

Click a property to see its units. Add a unit with a label (e.g. "2B," "Unit 1," "Main House"), bedroom and bathroom counts (decimals allowed, e.g. 1.5 baths), and notes — or start it from a copy (Section 5f). Like properties, removing a unit archives it rather than deleting it outright.

Each unit's card now shows its **bathroom count** next to bedrooms, and up to three lines of its notes directly on the card (hover to read the rest if there's more). An **Edit** link next to **Duplicate** on every unit card opens a form to change that unit's label, bedrooms, bathrooms, or notes without needing to archive and re-add it.

5e. The Unit Detail Screen

Clicking into a unit opens a tabbed screen with everything that belongs to that specific unit:

Tab	What's There
Leases	Every lease ever written for this unit, current and past, including controls to end, restart, or disable payments on a lease (Section 7).
Payments	Every payment line item for the unit's active lease (Section 8).
Maintenance	Work orders logged against this unit (Section 12).

A unit's public website listing (photos, price, amenities, description) is managed separately, from the Website Listings tab (Section 6) rather than from here.

5f. Starting From a Copy

New. Both **Add Property** and **Add Unit** have a **Start from a copy of (optional)** picker at the top of the form, and every property card and unit row also has its own **Duplicate** link that opens the form already filled in from that one:

	Copied	Never copied
Property	Title, city, state, ZIP, and Owning Company. Optionally, its units too (labels, bedrooms, bathrooms, notes) via a checkbox shown when the source property has at least one unit.	Street address, date acquired, purchase price, tenants, leases, payments, documents.
Unit	Bedrooms, bathrooms, and notes. Optionally, its website listing too (description, rent and features, not the photos) via a checkbox shown when the source unit has one — the copied listing starts hidden and Not Available until you turn it on.	Unit label (give the new one its own), tenants, leases, payments.

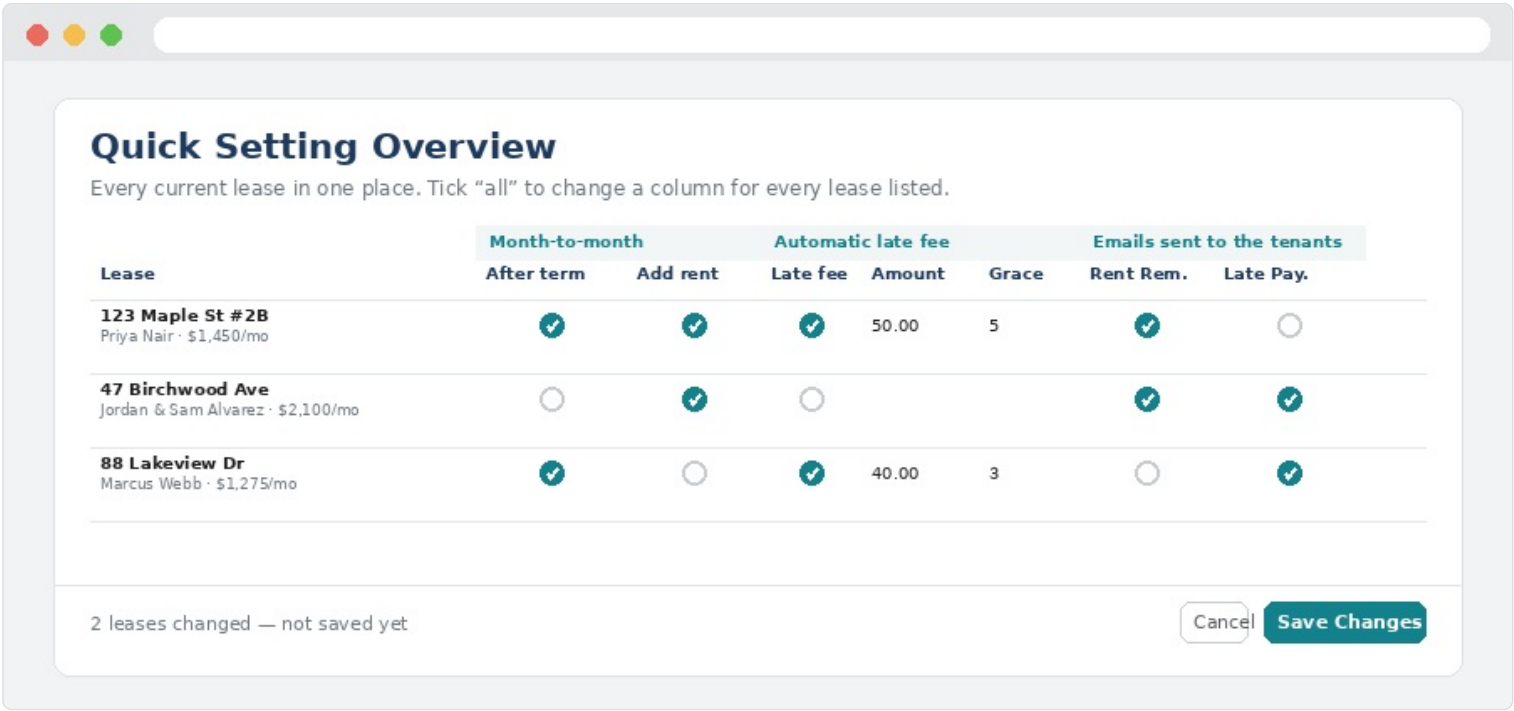
Saving a copied property or unit never changes the one it was copied from.

5g. Rental Applications

Applications can come in through the plugin's own public, unauthenticated submission endpoint (no login required for a prospective tenant to apply) or be entered by staff. Each one carries an applicant name, email, phone, and an optional link to a credit report you host elsewhere. Staff move an application's status forward (pending → approved/declined, etc.) from the unit's Applications area; approving one doesn't automatically create a lease — that's still a separate step (Section 7a).

5h. Quick Setting Overview

New. A **Quick Setting Overview** button next to **+ Add Property** in the Properties tab toolbar opens a single table listing every current lease, so the handful of settings usually set one lease at a time can instead be reviewed and changed across all of them at once.



Quick Setting Overview — every current lease's month-to-month, late fee, and email settings in one table.

The table has one row per current lease (address/unit, tenant names, end date or "Open-ended," and monthly rent) and a column for each of these settings:

- **Month-to-month — After the term ends** and **Add rent each month** — the same two toggles available on the lease itself (Sections 7a, 8d).
- **Automatic late fee — On**, **Amount ($)**, and **Grace (days)** (Section 7a); the amount and grace fields are disabled on a row until that row's late fee is turned on.
- One column per lease-level tenant email (Section 7g) — Rent Reminders, Late Payments, Failed Payments, Lease Terminations, and the three new opt-in emails covered in Section 20j, whichever ones apply.

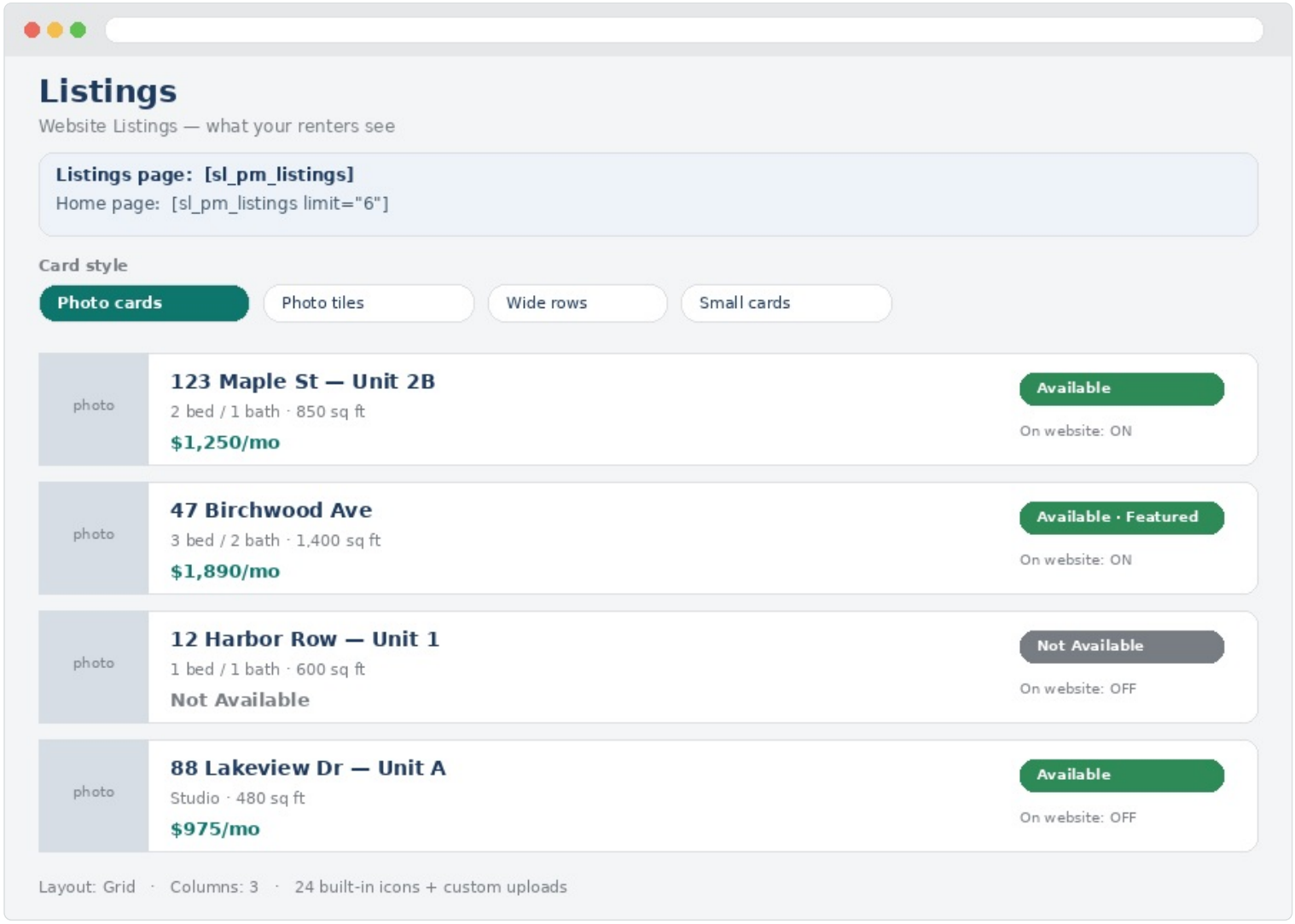
Every column header has its own checkbox, titled **"Turn '{setting}' on or off for every lease listed"** — ticking it sets that column for every lease currently shown (it shows a dash/indeterminate mark when rows disagree), respecting the search box above the table. A **"Late fee for all listed: $___ after ___ days — Apply"** control sets both late-fee fields at once across every listed row without needing two separate column checkboxes.

A shared panel at the top, **Email timing — applies to every lease**, holds the two plugin-wide timing numbers: how many days before rent is due to send the Rent Reminders email, and the new **"Start late-rent notices"** days-after-due-date setting (Section 20j) — changing either here changes it everywhere, the same as changing it under Settings → Emails & Auto Late Fees.

Nothing is saved until you click Save Changes. Changed rows are highlighted and counted ("N leases changed — not saved yet") before you save, and closing the window with unsaved changes asks "Close without saving your changes?" first. A search box filters the rows shown (and therefore what a column's "set for all" checkbox applies to) by address or tenant name.

6. Website Listings

New section. A full public rental-listings system for your website: photo galleries, amenities, pricing, and a details page per unit, shown as cards you place on any page with a shortcode or a pasted block of HTML. This is a bigger, separate system from the older per-unit "Listings" tab used only for the All Listings report in earlier versions — that data now feeds this public-facing one.



The Listings tab — card style picker and the public-listing status of every unit.

6a. What It's For

Each unit can have one website listing, built step by step in an editor and controlled by two independent switches:

- **Available** — on shows the monthly price and an arrow to the full details page; off keeps the card on the site but marked "Not Available," with no price and no details page (Section 6c).
- **On website** — off hides the unit from the website completely, keeping its photos, price and details intact so it can be switched back on any time; useful for a building with several similar units where only one should show at a time (Section 6c).

Cards are ordered Available + Featured units first, then other Available units, then Not Available units; within each group by street address, then unit. A unit hidden by the On Website switch never appears, in any order.

6b. Creating or Editing a Listing

From the **Listings** tab in the main navigation, every active unit is listed by property with its current status. Click **Create Listing** (or **Edit Listing**) to open the editor, a six-step wizard:

1. **Basics** — the Available switch, "This is a room for rent with a shared living space" checkbox, date available, year built, beds (0 = studio), baths, size (sq ft), total monthly price, deposit, lease length in months, and an optional **Featured** flag with its own badge wording (up to 28 characters) and icon.
2. **Amenities** — checkboxes for property amenities, laundry, utilities included, parking type and fee, and pets allowed (leaving both Cats and Dogs unchecked shows "No pets").
3. **Media** — add photos (uploaded and automatically shrunk for the web); the first photo is the card's main photo, with arrows to reorder, a "Make main" action, and a caption field per photo. **New in version 0.70.1:** a note at the top says what works best — landscape, 1200px wide or more — and each photo shows its actual size, with a red border on one under 900px wide or taller than it is wide, so it's obvious which ones to replace.
4. **Description** — a free-text description, plus an optional rent special (title, start/end dates, and its own description).
5. **Contact** — first/last name (with a "Hide my name" checkbox), role (Owner / Agent-Broker / Property Manager), email, phone, and a contact preference shown on the website (Phone & Email / Phone / Email).

6. **Review** — a summary of what will show on the card and details page, with warnings if there are no photos yet or no price is entered while Available is on (the website then says "Call for price").

Save is available on every step; **Save & Close** finishes from the last step. Deleting a listing (as opposed to turning it off) erases its photos, price and details permanently, with a confirmation that spells this out.

> **New in version 0.70.2 — clicking a photo on the details page opens a full viewer.** It steps through every photo of that listing (the grid on the page itself still shows only the first nine, with a "+N more" label over the last tile when there are more), with previous/next arrows, the arrow keys, and swiping on a phone, plus a "3 / 15" counter and that photo's caption. Closing it (the × button, clicking outside the photo, or Escape) returns to the details page.

6c. Available vs. On Website

Both switches live on the Listings tab's per-unit row as well as inside the editor, so staff can flip either one without opening the full form. See Section 6a for what each one does; a unit that has never been listed shows "Create Listing" instead of these switches.

> **New in version 0.70.0 — a Not Available banner.** Switching Available off no longer just removes the price; the website card shows a banner across the photo (wording is yours — "Occupied" by default, up to 30 characters), set under Settings → Website Listings' Card Style, Layout & Icons screen (Section 6e). **As of version 0.70.1,** the photo itself is never greyed out — the banner is the only visual cue, so a card that happens to have a dark or busy photo still reads clearly.

> **New in version 0.70.1 — listing changes show on the website right away.** Turning Available or On Website on/off, changing the price, swapping photos, or any other listing change now clears the site's page cache (LiteSpeed Cache, WP Rocket, W3 Total Cache, or WP Super Cache, whichever the site uses) the moment it's saved, instead of waiting for that cache to expire on its own — which could otherwise take up to a week depending on the host's settings.

6d. Putting Listings on Your Website

Two ready-made codes are shown at the top of the Listings tab, each copy-paste-ready for a Shortcode block or widget:

Code	What It Shows
Listings page	`[sl_pm_listings]` — every listing.
Home page	`[sl_pm_listings limit="6" …]` — only the first N (set with the "How many to show" box), with an optional "Only show Available units" checkbox and its own layout choice.

The shortcode also accepts, for a one-off page: `style="cards\|overlay\|list\|compact"`, `layout="grid\|carousel\|marquee"`, `columns="3"` (grid only), `show="3"` (carousel only), `available="1"`, `property="ID"` to show one property only, and `empty="…"` to override the "nothing to show" message for that page. The details page is the same page with `?sl_listing=ID` appended — nothing extra to set up. A unit's card and its details page use the colors saved under Settings → Appearance and the Sign In button color (Section 3f).

> **The "nothing to show" message is editable.** Shown in place of the cards whenever no units qualify — for example "Only show Available units" is on and none are — it defaults to a built-in sentence but can be replaced on the Listings tab, and reset to the default by leaving the box empty.

6e. Card Style, Layout & Icons

Also on the Listings tab, applying everywhere the shortcode is used (unless a specific page overrides it):

Setting	Choices
Card style	Photo cards, Photo tiles (price/address over the photo), Wide rows, Small cards.
Layout	Grid (rows), Carousel (slides, with arrows/dots and auto-slide seconds), Marquee (scrolls by itself, speed and direction, pause-on-hover).
Grid settings	Cards per row on a computer (fit automatically, or 2–6); tablets always show 2, phones 1–2.
Carousel settings	Cards in view, auto-slide on/off and interval, arrows on/off, dots on/off; visitors can also swipe.
Marquee settings	Speed (slow/medium/fast), direction, pause when pointed at; a visitor who has asked their device to reduce motion gets a row they scroll themselves instead.
Card details & icons	Turn Bedrooms / Bathrooms / Size on or off per card, and pick each one's icon from 24 built-in icons or an uploaded image (PNG/JPG/WebP/GIF, under 500 KB).
New (0.70.0): Not Available cards	**Show a banner across the photo**, and the wording it says (up to 30 characters, defaulting to "Occupied") — a live preview card shows exactly how it will look. See Section 6c for how this shows on the website.

7. Leases

7a. Creating a Lease

1. From a unit's Leases tab, click **+ Add Lease**.
2. Enter tenant name(s) as free text (e.g. "Jordan Alvarez & Sam Alvarez"), start date, end date, monthly rent, and security deposit.
3. **New:** optionally enter the **Primary Tenant Cell Phone** and **Home Phone** right on the New Lease form, so a phone number is on file from the moment the lease is created rather than added later from My Tenants.
4. Optionally turn on **Auto Late Fee** and set an amount and a grace-period length in days (Section 8l covers what this triggers).
5. Optionally check "Enable month-to-month at the end of this lease term" so the lease doesn't just lapse at the end date.
6. If SL Waivers is active on the site, optionally pick a lease template from the SL Waivers bridge (Section 7c).
7. Save. A tenant-tracking row is created automatically behind the scenes so the lease shows up in My Tenants (Section 13) right away, even before anyone has been invited.

New: the same two phone fields — **Cell Phone** and **Home Phone** — are also on the "Add a person" row under Tenants on this Lease (Section 13c), and each co-tenant's numbers then show next to their name in that list once saved.

7b. Rent Schedule & Security Deposit

When creating a lease, checking **Auto-generate the monthly rent payment schedule** auto-creates one scheduled "Monthly Rent" payment line item per month from the start date through the end date (or 12 months out, if no end date is set) — each due on the same day of the month as the start date. A separate one-time "Security Deposit" payment line item is created automatically whenever a deposit amount greater than $0 is entered, due on the lease's start date.

> **Nothing here is locked in.** Every generated payment line item can still be edited or removed individually afterward from the unit's Payments tab (Section 8a) — the schedule is a starting point, not a constraint. For adding more charges later — a renewal's worth of rent, or an ongoing month-to-month auto-renew — see Section 8d.

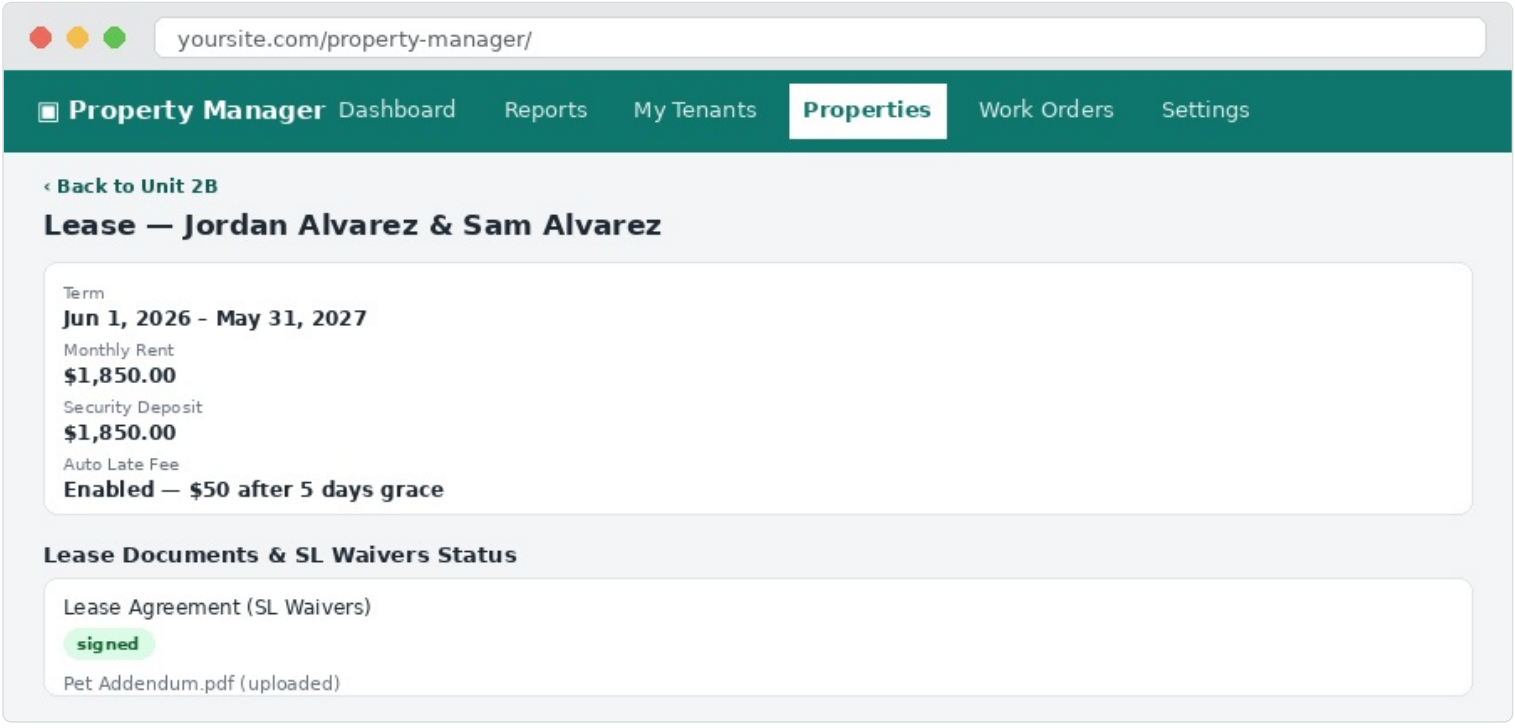
7c. Lease Documents & the SL Waivers Bridge

A lease's Documents area shows three kinds of files together:

- **Uploaded documents** — added directly here (title + file URL), tagged "upload."
- **Property default documents** — house rules, disclosures, or other documents that apply to every tenant on this unit's property automatically, managed centrally under Settings → Property Documents (Section 20f) rather than attached lease by lease.
- **SL Waivers documents** — live signing status pulled from the separate SL Waivers plugin, matched to the tenant by email, tagged "sl_waivers."

Both the printable copy of a waiver document and its signature image render through a signed, time-limited link (valid 6 hours) generated directly by this plugin, so a plugin-login staff member or a tenant without a WordPress admin session can still view and print them.

> **This plugin only tags and displays waiver status — it doesn't send anything.** Actually sending the lease agreement to the tenant for e-signature still happens inside SL Waivers itself (its kiosk mode or its own admin screen). SL Property Manager just lets you pick which SL Waivers lease template a given lease should use, and then shows you whether that document has been sent, viewed, or signed. If SL Waivers isn't active on the site, this area shows "SL Waivers isn't active on this site" instead of an error.



A lease's detail view, showing terms, End/Restart Lease controls, and its Lease Documents / SL Waivers status area.

7d. Editing a Lease

Any lease field can be edited after creation. There's no separate "renew" action — a renewal is handled by editing the existing lease's end date (and rent, if it's changing), adding another date range of rent payments (Section 8d), or by creating a new lease for the same unit and ending the old one, whichever better matches how you keep records.

7e. Ending & Restarting a Lease

A lease's status can also be **ended**, alongside pending/active/archived:

- **End Lease** — a confirmation first explains exactly what happens: "End this lease? It stops counting as current, month-to-month auto-rent stops, and the end date becomes today if it was later. Anything already owed stays on the account." Confirming sets status to **ended**, turns off auto-generate-monthly-rent, and moves the end date up to today if it was open-ended or further out.
- **Restart Lease** — available on an ended lease, this opens a small modal to optionally pick a new end date (leave it blank for an open-ended, month-to-month lease). Confirming sets the lease back to **active**.

Past leases on a unit are shown separately from current ones in the Leases tab, so staff can tell at a glance which tenants are living there now versus who used to.

7f. Disabling Online Payments for a Lease

A checkbox on the lease — **"Disable online payments for this lease (collections) — tenants can't pay in the system"** — stops that tenant from using Pay Now (Section 8j) at all, for example once an account has gone to outside collections and you don't want partial self-service payments complicating it. Turning it on shows a confirmation first. A lease with this on shows a "payments off" badge on its row in the Leases tab (Section 5e) so it's visible without opening the lease. It also hides AutoPay and scheduled payments (Section 8i) from that lease's tenants, the same as Pay Now.

7g. Per-Lease Email Notification Toggles

Beyond the plugin-wide master email switch (Section 8k), each lease has its own set of checkboxes — one per automated email template — to turn off just that lease's automated emails without affecting anyone else. The help text on this panel explains the use case directly: "Turn off any email you don't want this lease's tenants to get — for example the termination notice when they're on a new payment plan for overdue rent." This is useful for a tenant who is already on a manual payment plan and shouldn't keep receiving the formal termination notice (Section 8l) while they work it off.

New: three more templates can be toggled here alongside the original four (Rent Reminders, Late Payments, Failed Payments, Lease Terminations) — **Payment Made**, **Bank Payment Approved**, and **Payment Changed** (Section 20j). All three are off by default on every lease, individually or in bulk, until switched on — whether per lease here, or for every lease at once from Quick Setting Overview (Section 5h).

8. Payments

8a. Payment Line Items & Statuses

Every rent charge, fee, late fee, and deposit is its own row on a lease's Payments tab, with a type, label, amount due, amount paid, due date, and status.

Status	Meaning
scheduled	Created, not yet due or not yet paid.
pending	In progress (e.g. an online payment started but not yet confirmed).
processing	Payment captured by the processor but still settling — a bank (ACH) payment commonly sits here for a few days (Section 8l).
overdue	Past its due date and still unpaid — set automatically by the nightly sweep (Section 8l).
paid	Fully recorded as paid — reached once the running total of every recorded payment parcel (Section 8b) covers the full amount due, not just by a single lump payment.

Staff can also create a one-off payment line item directly (**+ Add Payment** → **Single Payment**) for anything that doesn't fit the auto-generated rent schedule — a pet fee, a repair charge-back, a manually-entered late fee, and so on.

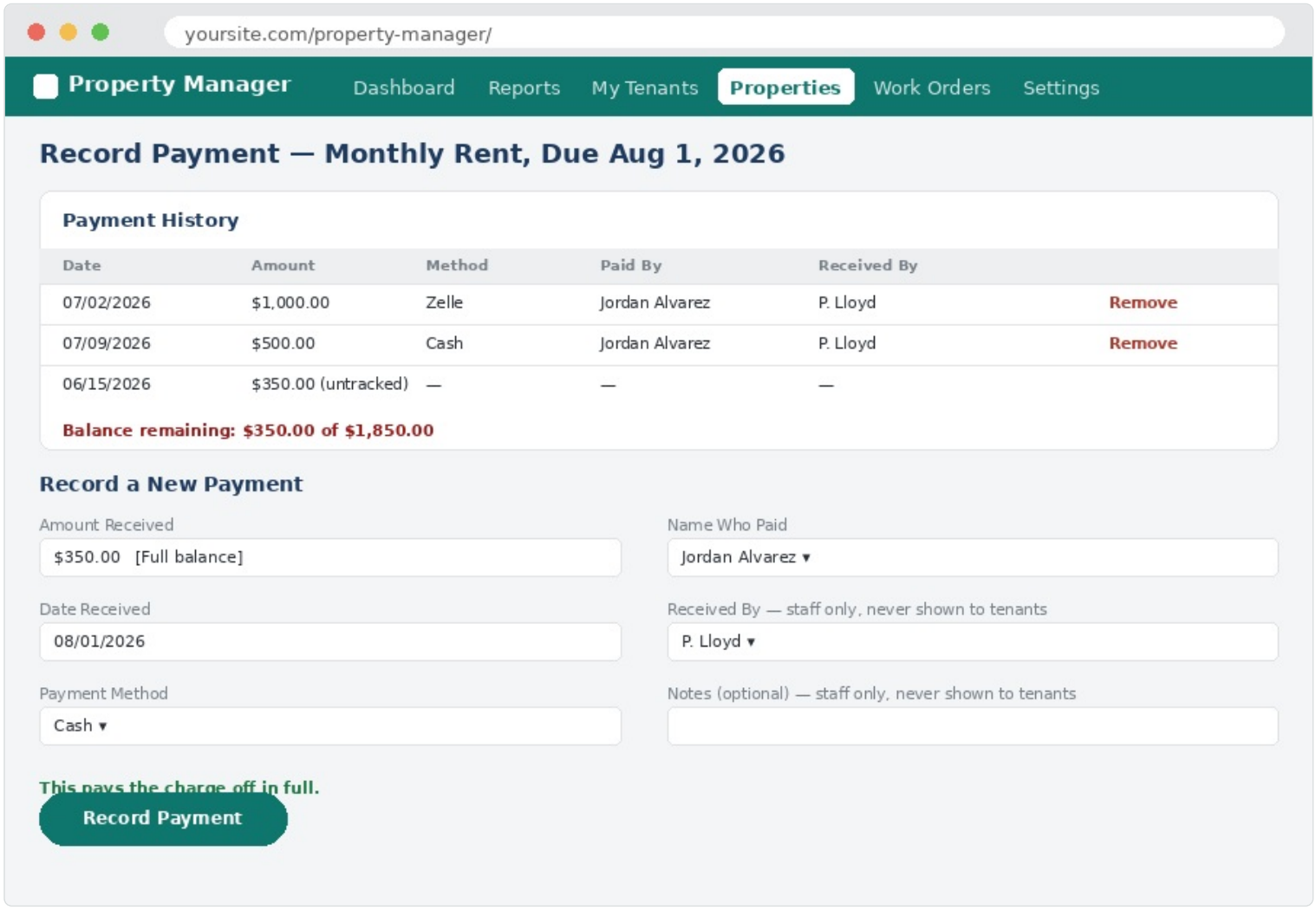
> **A bank payment still processing shows right on the charge. New.** While a submitted bank (ACH) payment hasn't cleared yet, the charge shows **"Bank payment processing since {date}"**, with a tooltip explaining that no late fee is added while it's processing (Section 8l).

8b. Recording a Payment (Partial & Full)

"Mark Paid" is "**Record Payment**," and a single charge can be paid off in more than one parcel over time rather than all at once — useful for a tenant paying rent in two installments, or catching up on an overdue balance a little at a time.

1. On the unit's Payments tab, click **Record Payment** next to the charge. The form opens showing any payment history already recorded against it — date, amount, method, who paid, who received it (staff only), with a **Remove** action on each parcel.
2. Enter the **Amount Received** (or click **Full balance** to fill in exactly what's still owed). As you type, the form shows either "Partial payment — $X will still be owed" or "This pays the charge off in full."
3. Enter the **Date Received**.
4. **Payment Method** — a free-text, growing picklist (type a new value to add it for next time) rather than a fixed Cash/Check/Other choice.
5. **Name Who Paid** — a growing picklist of payer names.
6. **Received By** — a growing picklist of staff names. Labeled "staff only, never shown to tenants." **New in version 0.73.0:** a name added here with "+ Add new" (or a new Payment Method added the same way) is saved to the list right away, so it's there next time even if this window is closed without actually recording a payment. An **Edit names…** link under the Received By field opens a small manager: hide someone who no longer collects payments (their name stays on whatever they already took, it just drops off the picklist for new ones), rename a misspelled name — with an optional "also fix N past payments" checkbox to correct it on payments already recorded, not just going forward — and see how many payments each name is currently on. A name that came from a Staff Login account is renamed in Settings → Staff Logins (Section 20b) instead.
7. **Notes** (optional) — also labeled "staff only, never shown to tenants."
8. Click **Record Payment**. The parcel is added to the history, and the charge's status and remaining balance update immediately — it only flips to **paid** once the recorded parcels add up to the full amount due.

New: attaching a receipt or bill to a payment. Editing a payment, or adding one as a Single Payment (Section 8d), has its own **Receipt or Bill** field (a PDF or a picture, up to 10MB, kept in the same private, encrypted storage an expense receipt uses — Section 9d). It isn't offered on the Monthly — Date Range or Month-to-Month add-payment modes, since those create more than one charge at once. A checkbox, off by default, reads **"Let the tenant see this file on their Payments page"** — left unchecked, the attachment is for staff's own records only and a tenant never sees it; checked, the tenant opens it through the same kind of temporary signed link staff use, not a public Media Library URL.



The Record Payment form — prior payment history with Remove, and the parcel fields.

A pre-existing balance shows as an "untracked" row. If a charge already had some amount recorded as paid before this version's payment-history table existed, that older amount appears as a single "untracked" row at the top of the history rather than being lost or needing to be re-entered.

Any parcel can be undone. Clicking **Remove** on a payment-history row deletes just that parcel and recalculates the charge's status and remaining balance — useful for correcting a payment entered against the wrong charge or for the wrong amount, without having to remove and recreate the whole charge.

8c. Payment History, Methods & Exporting

Because Payment Method and Name Who Paid are both growing picklists rather than a fixed list, they naturally build themselves into a useful, reusable set of options as staff record real payments — a cash-heavy property ends up with "Cash," "Zelle," "Venmo (manual)" and similar showing up as quick picks, without any setup screen to maintain them. **Received By** works the same way for staff names.

A payment-history export (available from the Payments tab) lists every recorded parcel across whatever's currently in view — useful for reconciling against a bank statement or handing a batch of entries to a bookkeeper.

8d. Adding a Recurring or Month-to-Month Charge

Clicking **+ Add Payment** on a lease's Payments tab opens three modes, not just one:

Mode	What It Does
Single Payment	One charge of any type (Rent, Fee, Late Fee, Deposit), with its own due date, and its own optional Receipt or Bill attachment (Section 8b). The everyday way to add a one-off item.
Monthly — Date Range	Adds one payment per month, on the lease start date's day of the month, from a chosen start through end date — handy for a fixed-term renewal (e.g. another 6 or 12 months) without creating a whole new lease. Works for any type/label/amount, not just rent — a recurring parking fee, for instance.
Month-to-Month	Turns on **auto-generate monthly rent** for this lease (the same checkbox shown above the payments table once it's on) — the system keeps adding next month's rent automatically (see the note below), until turned back off.

New in version 0.73.0 — a rent charge's label says which month it's for. A rent charge made from a lease's own dates (Monthly — Date Range above) or from Month-to-Month auto-renew now reads, for example, **"Rent - November 2026"** instead of the plain "Rent," taken from the charge's own due date

— makes a long list of rent charges on the Payments tab easier to scan at a glance. A label you've already customized to include its own month and year (typed any of the twelve month names) is left exactly as you wrote it.

New: a simpler Month-to-Month auto-renew rule. A daily sweep (Section 8l) checks every lease with auto-generate-monthly-rent on and adds next month's rent charge the day after the current month's is due — for example, rent due October 1st means next month's charge appears October 2nd. Turning this on late never back-charges every month that was missed; it only adds the single next upcoming month. An ended lease (Section 7e) is skipped automatically, since ending a lease already turns this off. (This replaced an earlier "keep about two months ahead" rule, and also fixed a date-drift bug that could occur for rent due on the 29th through 31st after a short month.)

New: emailing a tenant about a charge you just added. Both Single Payment and Monthly — Date Range have an **"Email the tenant about this new charge"** checkbox, off by default each time the form opens. Checking it sends every tenant on the lease a tailored notice using the editable **New Charge Added** template (Section 20j) — worded for a single charge, or for the whole run when added as a date range. This send always goes out, even while the master email-pause switch (Section 8k) is on, since it's a deliberate staff action rather than an automated notice, and it has no per-lease toggle of its own.

8e. Setting Up Card & Bank Payments (Stripe)

Card and US bank account (ACH) payments go through Stripe Checkout — the tenant is redirected to Stripe's own hosted payment page, so card and bank numbers never touch this site. Configure it under Settings → Payments (Section 20g):

1. Enter your Stripe **Publishable Key** and **Secret Key** (from your Stripe dashboard).
2. Enter the **Webhook Signing Secret** for a webhook you've pointed at `{your site}/wp-json/sl-property-manager/v1/webhooks/stripe`, listening for **checkout.session.completed, checkout.session.async_payment_succeeded,** and **checkout.session.async_payment_failed** (the last two confirm and catch bank/ACH payments — Section 8l).
3. Toggle **Stripe Enabled** on.
4. Click **Test my Stripe setup** (after saving) for a plain checklist of what the plugin found when it checked in with Stripe — nothing is charged by this test.

New: AutoPay needs two more webhook events. If AutoPay and scheduled payments (Section 8i) is turned on under Settings → Payments, add **payment_intent.succeeded** and **payment_intent.payment_failed** to the same webhook, alongside the three Checkout events above. "Test my Stripe setup" checks for these two automatically only while AutoPay is turned on, and tells you exactly which events are missing if any are.

The webhook is what actually confirms a payment, not the redirect. When a tenant finishes paying, Stripe redirects their browser back to a success page — but that's only where they land. The webhook call is the authoritative signal that funds actually moved, verified by an HMAC signature check against your Webhook Signing Secret. If the webhook isn't configured correctly, a payment can go through on Stripe's side without ever being marked paid here.

8f. Setting Up PayPal & Venmo

PayPal payments (PayPal balance and, for eligible US buyers, Venmo) go through the PayPal Orders API. Configure it under Settings → Payments:

1. Choose **Sandbox** (for testing) or **Live** mode.
2. Enter your PayPal **Client ID** and **Client Secret** for that mode.
3. Toggle **PayPal Enabled** on.

Venmo needs no extra setup here. It appears automatically as a payment option for eligible US buyers, as long as your PayPal Business account has Venmo enabled on PayPal's side — there is nothing further to configure in this plugin.

8g. Adding a Card Surcharge Fee

New. Under Settings → Payments, **"Add a credit card fee when a tenant pays by card"** adds an optional surcharge on top of what a tenant pays by card, shown to them before they pay:

- **Percent of the payment** and/or a **flat amount**, combined, and a **name shown to the tenant** for the line item (default "Credit card processing fee").
- Applied separately to **Stripe card payments** and/or **PayPal/Venmo payments**, each its own checkbox.
- Bank account (ACH) payments through Stripe never carry the fee — when it's on, a tenant paying by Stripe is offered "Card (+ fee)" and "Bank account (no fee)" as separate buttons (Section 8j).

The fee is booked onto the tenant's account as its own "fee" line item once the payment goes through, so the ledger always shows what was actually charged. A note on the settings screen is worth taking seriously: check your state's rules and your card processing agreement before turning this on, since some states cap or prohibit credit card surcharges.

8h. Pay Through an App (Venmo, Cash App, Zelle…)

New. For payment apps where a tenant sends money to your own account or username rather than through a processor this plugin can confirm automatically — Venmo, Cash App, Zelle, a personal PayPal, a bank transfer — Settings → Payments has a **"Pay Through an App"** panel:

1. Click **+ Add an app** for each one you accept, filling in the app's name, the username/phone/email to pay, an optional link, and an optional note (for example "Put your unit in the note").
2. **New in version 0.71.0:** upload a **QR code picture** — the one Venmo, Cash App, PayPal, or your bank's Zelle shows you under "My code" (PNG, JPG, WebP or GIF, up to 4MB).

3. Set the **notice shown to tenants** (appears bold and highlighted) and a **cell number** and/or **email** to contact once they've paid.

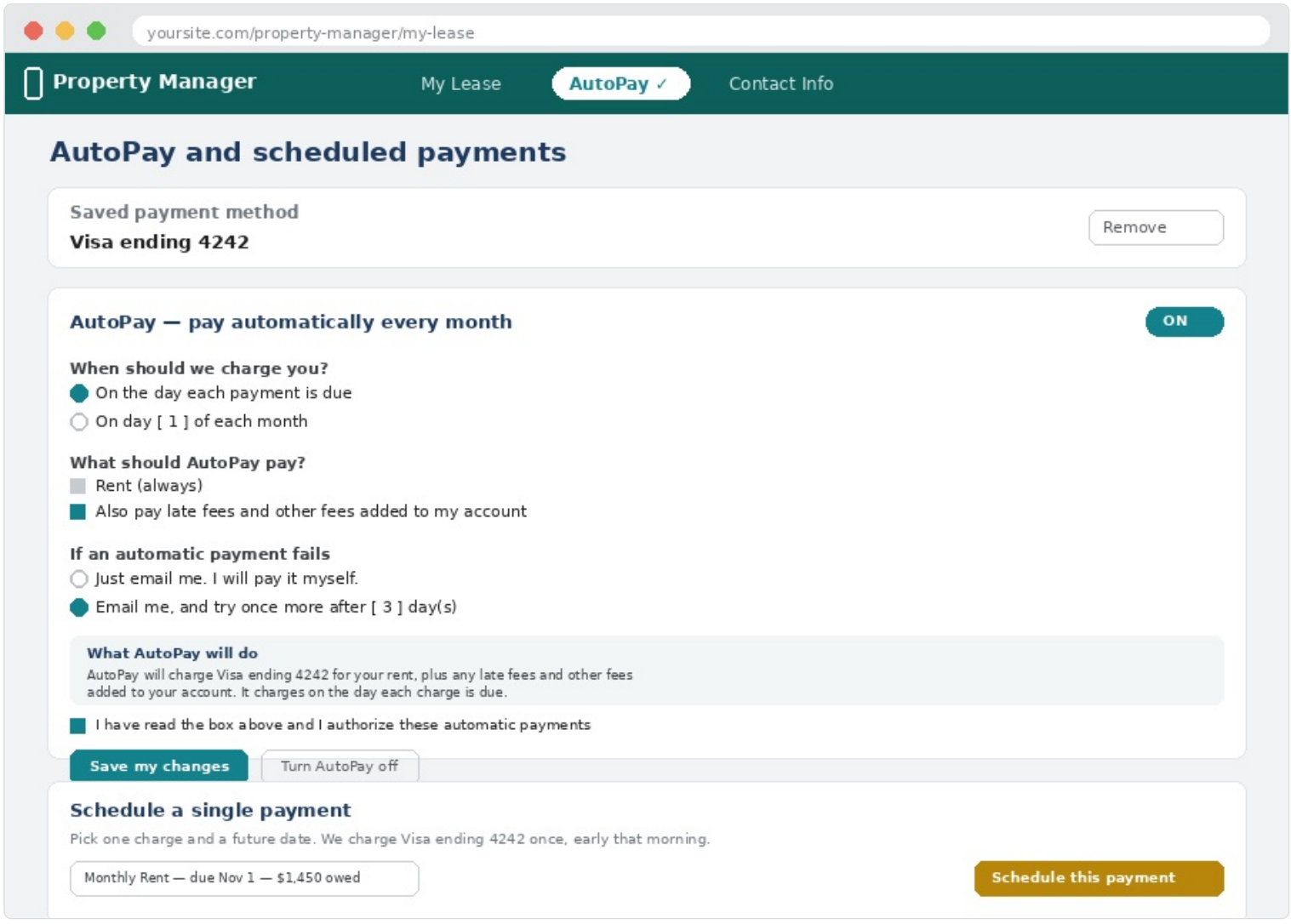
These show to a tenant under "Other ways to pay" on their Payments page and inside the Pay Now window (Section 8j), alongside whichever online gateways are enabled. Since nothing about an app payment is recorded automatically, staff still record it afterward from the Payments tab (Section 8b) once the tenant lets them know.

> **New in version 0.72.0 — each app is its own button, in the app's own color.** "Other ways to pay" now lists the configured apps as a row of buttons (Venmo blue, Cash App green, PayPal navy, Zelle purple, and so on), each marked with a small ▦ **QR** label when that app has a code picture uploaded. Clicking one opens a **"Pay with {app}"** window with everything needed to actually pay: the amount still owed, the QR code (click to open it full size, with a reminder to scan it with the phone's camera or the app itself), the username/phone/email with a one-click **Copy** button, an **Open {app} ↗** button when a link was set, the note if any, and the same "once you've paid, contact us" notice with its phone/email links. This appears identically on the tenant's Payments page and inside the Pay Now window (Section 8j).

8i. AutoPay and Scheduled Payments

New. Lets a tenant save a card or bank account and have the plugin pay their rent for them automatically each month, or schedule a single future payment, without them needing to click Pay Now. It's Stripe-only, and off plugin-wide until staff turn it on.

1. Under Settings → Payments (Section 20g), check **"Let tenants use AutoPay and scheduled payments (Stripe only)."** It's off by default. The help text spells out the guardrail plainly: "Nothing is ever charged unless the tenant sets it up and ticks an authorization box. You can switch a tenant's AutoPay off from the unit's Payments page, but only the tenant can switch it on."
2. Make sure the Stripe webhook is listening for the two extra AutoPay events (Section 8e).



A tenant's AutoPay tab — saved payment method, monthly AutoPay settings, and Schedule a single payment.

What a tenant sees

Once staff have turned the feature on, a tenant whose lease allows it (and who doesn't have online payments disabled, Section 7f) gets an extra **AutoPay** tab on their My Lease screen (shown with a checkmark once AutoPay is actually on). It walks through, in order:

- **Saved payment method. Save a card** or **Save a bank account** opens Stripe's own secure page in "setup" mode — the card or bank number is entered there and never touches this site, only a Stripe id and a label such as "Visa ending 4242" are kept. Saving a method doesn't charge anything and doesn't turn AutoPay on by itself. **Use a different card**/**Use a different bank account** replace it; **Remove** takes it off file (with a confirmation that this also turns AutoPay off and cancels anything not yet started).
- **AutoPay — pay automatically every month**, shown with an ON/OFF badge once a method is saved:
  - **When should we charge you?** — "On the day each payment is due," or "On day {1–28} of each month." In day-of-month mode, anything covered that's already due or coming due within the next 10 days is included in that month's charge, so nothing due right after the chosen day is missed.

  - **What should AutoPay pay?** — Rent is always included (shown as a checked, locked checkbox); a second checkbox, **"Also pay late fees and other fees added to my account,"** is optional.
  - **If an automatic payment fails** — "Just email me. I will pay it myself," or "Email me, and try once more after {1–10} day(s)."
  - A **"What AutoPay will do"** box spells out, in plain language generated from the choices above, exactly what will be charged, when, any card fee that applies, and what happens on failure — this is the exact wording the tenant is agreeing to, and it updates live as they change the choices above.
  - A required checkbox: **"I have read the box above and I authorize these automatic payments from {payment method} until I turn AutoPay off." Turn AutoPay on** (or **Save my changes**, once it's already on) is disabled until this is checked, and the exact wording agreed to is stored with the date, shown back as "You authorized AutoPay on {date}." Changing any setting above un-checks the box and requires authorizing again before saving.
  - **Turn AutoPay off** asks "Automatic payments that have not started will be cancelled. You will need to pay your rent yourself," then confirms.
- **Only one tenant per lease can have AutoPay on at once** — if a roommate already has it on, the panel says so by name ("{name} already has AutoPay turned on for this lease. Only one person on a lease can, so the rent is never charged twice.") instead of showing the settings.
- **Schedule a single payment** — pick one still-owed charge, a future date (up to a year out), and an amount (defaulting to the full balance; a partial amount is allowed), tick its own one-time authorization checkbox, and click **Schedule this payment**. Scheduling for a date after that charge's due date warns that a late fee may still be added before the scheduled payment runs. A scheduled (not yet started) payment can be cancelled any time before it runs.
- **Upcoming and recent automatic payments** lists every AutoPay and scheduled charge from the last 45 days with its status (scheduled, processing, succeeded, failed, cancelled), a retry date if one is pending, and the reason for a failure; a **Cancel** link is offered on anything still scheduled or waiting to retry.

What staff see

A staff-only panel on the lease's Payments tab shows **AutoPay: ON — {tenant}, {payment method}** or **AutoPay: off**, with every tenant on the lease and their own on/off status, and every charge waiting to run or recently finished. Staff can **Turn off** a tenant's AutoPay (with a confirmation that "Only they can turn it back on") and **Cancel** a scheduled or retry-pending charge — staff can never turn AutoPay on for a tenant; only the tenant can.

How it actually runs

AutoPay and scheduled payments are processed as the very first step of the nightly sweep (Section 8l), before overdue status and late fees are worked out, so a charge AutoPay pays on time is never mistakenly treated as late. Each night:

1. Every lease with AutoPay on gets that month's (or that due date's) qualifying charges lined up to run, skipping anything already covered by a bank payment still processing (Section 8l) or already queued.
2. Any charge still stuck "processing" from more than 20 hours ago is checked directly against Stripe rather than waiting on a webhook that might never arrive, so a missed webhook can't leave a tenant's payment silently stuck.
3. Everything actually due to run tonight — new AutoPay charges, scheduled payments whose date has arrived, and any due retry — is attempted, at most twice total (the first try plus one retry, only if the tenant chose that failure option).

The `payment_intent.succeeded` and `payment_intent.payment_failed` Stripe webhook events (Section 8e) confirm a charge the moment Stripe reports it, independent of the nightly reconciliation above.

> **Database footprint.** AutoPay adds two new tables (`autopay` settings per tenant, and `auto_charges` for every attempt), and the plugin's stored database version moved to 0.64.0 to track them.

8j. What a Tenant Sees: Pay Now & Partial Payments

On their own account's My Lease tab, a tenant sees a **Pay Now** button on any unpaid charge — unless that lease has online payments disabled (Section 7f), in which case Pay Now doesn't appear at all. The window that opens shows the balance owed and an amount field (defaulting to the full balance, but a tenant can pay less); the options below adjust automatically:

- If a card fee is on (Section 8g), Stripe is offered as two buttons — **Pay by Credit/Debit Card** (the entered amount plus the fee, spelled out) and **Pay by Bank Account (ACH)** (no fee) — otherwise one combined **Pay with Card or Bank Account** button.
- **Pay with PayPal or Venmo**, with its own fee shown if one applies to that gateway.
- **Other ways to pay** (Section 8h), always shown beneath the online options when any apps are configured — the "Pay with {app}" window it opens shows whatever amount is currently entered in this Pay Now window (or the full balance if nothing's typed yet).

After paying online, the tenant is redirected back to the Access URL, which shows a banner confirming success or that the attempt was cancelled — a PayPal payment additionally completes a capture step automatically on that return before the banner confirms it. A partial online payment is recorded as its own parcel (Section 8b) the same way a staff-recorded partial payment is, tagged so staff can see it came from the tenant online rather than being entered manually.

8k. Turning Off Automated Emails (All or Per-Lease)

A master switch under Settings → General — **"Turn off ALL email notifications (until you go live with the plugin)"** — blocks every automated notification plugin-wide at once: rent reminders, late notices, work order alerts, checklist/amendment notices, and scheduled reports. It's meant for the setup period while staff are importing data and don't want real tenants getting real notices yet. It does **not** block password resets, login verification codes, an invite a staff member clicks to send on purpose, a manual "Email the tenant about this new charge" send (Section 8d), or clicking Send Now on a report — those always go through regardless of this switch.

Layered underneath that plugin-wide switch is the per-lease set of toggles covered in Section 7g, which stays in effect whether or not the master switch is on — so a lease can have its termination notice turned off permanently for its own reason, independent of whether the whole plugin is paused for setup.

> **Optional staff copies.** Under Settings → Emails & Auto Late Fees (Section 20j), each editable template can also be set to send a copy to a staff email address — a quick way to keep an eye on what tenants are actually receiving without digging through each tenant's own inbox.

8l. Automatic Late Fees, Reminders & the Lease Termination Notice

A scheduled sweep runs once daily and does several things, in order:

1. **Runs AutoPay and scheduled payments** (Section 8i) — happens first, so an on-time automatic payment is never mistakenly flagged late by the next two steps.
2. **Marks overdue payments** — any scheduled/pending payment whose due date has passed flips to **overdue**, except a charge with a bank payment still processing (below), which is left alone until that payment clears or fails.
3. **Keeps month-to-month leases rolling** — adds the next month's rent for any active lease with auto-generate-monthly-rent on, the day after the current month's rent was due (Section 8d).
4. **Sends rent-due-soon reminders** — emails tenants whose rent is due in N days (default 3, set under Settings → Emails & Auto Late Fees, Section 20j), using the editable Rent Reminders template.
5. **Applies auto late fees** — for any lease with Auto Late Fee turned on (Section 7a), once an overdue rent payment is past its grace period, a "Late Fee — {due date}" charge is added automatically (never charged twice for the same missed payment) and the Late Payments template email goes out with the tenant's current total overdue balance. **New:** a charge with a bank payment submitted before the late-fee date, still processing, is skipped by this step entirely — no late fee or notice is added on it while the bank transfer is still clearing (the charge shows "Bank payment processing since {date}," Section 8a). If that bank payment later fails, the normal late-fee/overdue handling picks the charge back up.
6. **Sends the Lease Termination notice** — only if enabled under Settings → Emails & Auto Late Fees, once a lease's overdue balance crosses a dollar threshold or its count of unpaid payments crosses a count threshold you set there, but no sooner than the "Start late-rent notices" days-after-due setting (Section 20j) allows.

Every step in the sweep, and every automated email it sends, is skipped for a lease with its own notification turned off (Section 7g), and all of it except the AutoPay step is skipped entirely while the master email-pause switch is on (Section 8k).

A separate, immediate trigger — not part of the daily sweep — sends the **Failed Payments** template the moment an online payment that already looked successful later fails to actually settle (most commonly a Stripe ACH bank debit that bounces after the tenant's Checkout session already completed). This is caught by the `checkout.session.async_payment_failed` Stripe webhook event, which is why that event needs to be included on the webhook configured in Section 8e.

> **The Lease Termination notice is a formal, jurisdiction-specific legal notice.** Its subject and body follow a Pennsylvania Landlord Tenant Act of 1951 (68 P.S. § 250.501) formatted termination letter, with the property address, a 30-day vacate deadline calculated from the notice date, the next amount due, a signature line, and the statute citation. This hardcodes Pennsylvania's specific statute language, which may not match the law in every jurisdiction a property sits in. Review the template's wording against your own local landlord-tenant law (Settings → Emails & Auto Late Fees, Section 20j) before relying on it for a property outside Pennsylvania.

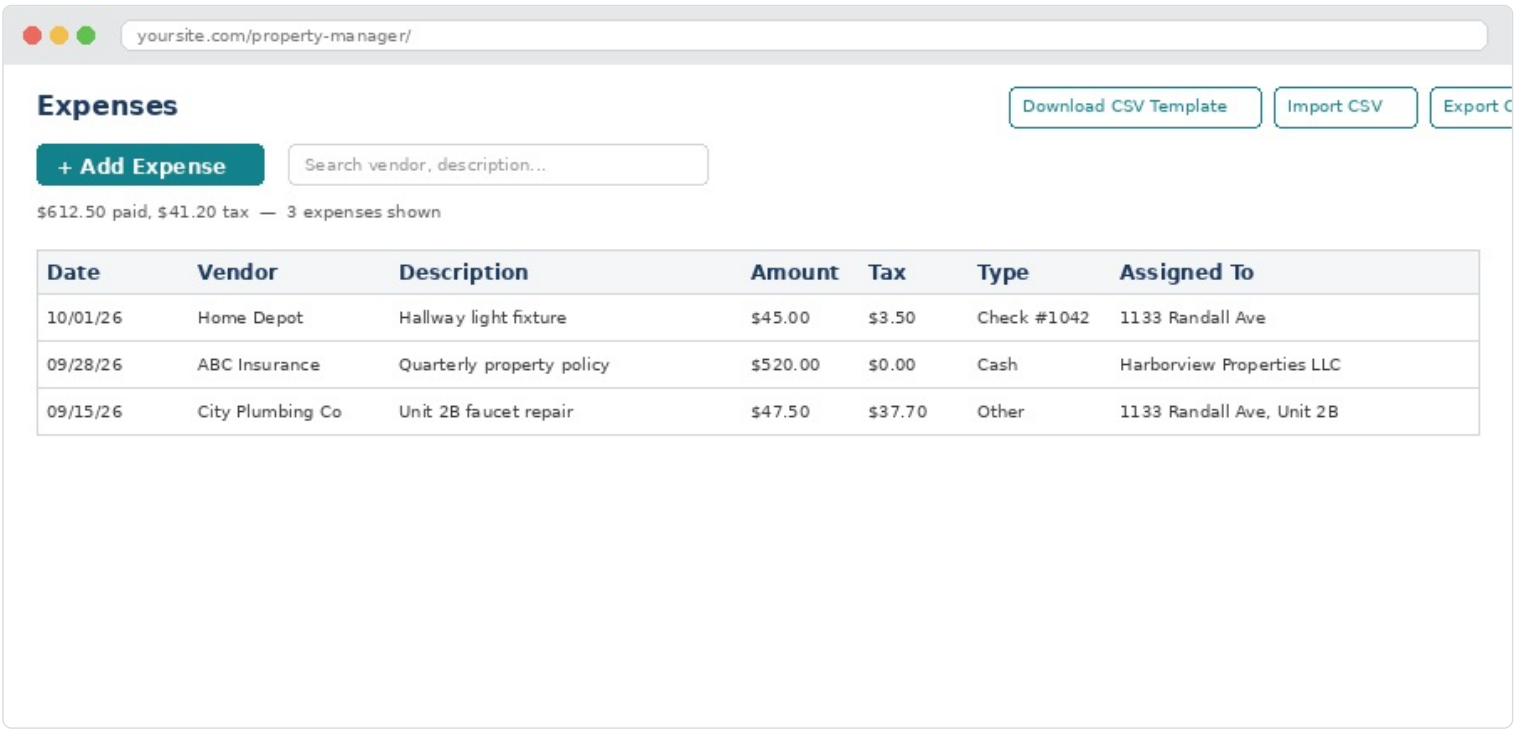
9. Expenses

Expenses is a landlord-side record of receipts and bills — repairs, supplies, services, anything you pay out rather than collect — kept separate from tenant rent and fees (Section 8). Each one is assigned either to a single property or, for shared overhead like insurance or a management fee, to a Property Ownership company (Section 20e) so it's spread across every property that company owns rather than picked arbitrarily.

9a. Adding an Expense

1. From the **Expenses** tab, click **+ Add Expense**.
2. Enter the **Date**, **Amount Paid**, and any **Tax Paid**.
3. Pick or type a **Store / Vendor**, **Tax Category**, and **Payment Type** (Section 9b). If Payment Type is "Check," a **Check #** field appears.
4. Add a **Description**, and optionally attach one or more **Receipt Images** (Section 9d).
5. Under **Assign To**, choose **Property** (pick one) or **Company** (pick one from Property Ownership) — required either way.
6. Click **Save Expense**.

The Expenses list shows every expense with its date, vendor, description, amount/tax, payment type, and what it's assigned to, with a running total (amount paid and tax paid) across whatever's currently visible, and a full search/filter panel covered in Section 9f.



The Expenses tab — toolbar, running totals, and the expense list.

9b. Vendor, Tax Category & Payment Type Picklists

Vendor and Payment Type are simple, growing lists — typing a new value into either on the Add Expense form adds it to that list automatically for next time, sorted alphabetically. Payment Type starts out seeded with **Cash** and **Check** on a fresh install. Tax Category works the same way day to day, but can also be actively managed (Section 9c).

9c. Managing Tax Categories

Under Settings → Reports (Section 20n) is a Tax Category manager that shows every category in use, including ones that have been hidden, with a usage count for each:

- **Hide** a category to stop it appearing as a choice on new expenses, without touching any expense already using it.
- **Rename** a category — this updates its name everywhere, including on every existing expense already assigned to it, so historical reporting stays consistent under the corrected name.

Tax categories also feed into Property Profitability grouping and the Annual Tax Summary report (Section 19a).

> **Fixed in version 0.76.1 — the list used to need sideways scrolling to reach Rename / Hide on a long category name.** Each column now has a fixed width and the category name wraps onto a second line instead of pushing the usage count and the Rename / Hide links off the right edge of the window.

9d. Receipt Images (Multiple Pages) & Private Storage

Attaching a receipt image (or PDF) uploads it — unlike a work order's image attachments (Section 12a), this one is a permanent upload, not just a browser preview. An expense can hold more than one receipt image — useful for a multi-page invoice or a receipt photographed in two shots — added and removed individually from the expense's form; the very first one uploaded continues to also serve as the receipt shown on older reports/exports that only expect a single image. A file must actually be a PDF or a picture (JPG, PNG, WebP, GIF, or HEIC) — checked from its real contents, not just its file name — and no larger than

10 MB.

> **As of version 0.67.0, receipts are kept private, not in the Media Library.** A receipt you attach is encrypted on disk under `wp-content/uploads/sl-pm-private/` and opens only through a temporary link, valid for 12 hours, handed only to someone signed in here — reloading the page gets a fresh link. There's no longer a "Save to Media Folder" option, since receipts no longer go into the Media Library at all. Any receipt already in the Media Library from before this update was copied into private storage and then removed from the public Media Library, automatically, as part of updating.

9e. Importing & Exporting via CSV

1. Click **Download CSV Template** for a starter file with the correct column headers and one example row.
2. Fill in your rows: Date, Amount Paid, Tax Paid, Vendor, Description, Tax Category, Payment Type, Check #, Assigned Type (`property` or `company`), Assigned To (the exact street address or company name), and an optional Receipt URL.
3. Click **Import CSV** and choose your file.

Every row with a date is imported, even if its Assigned To doesn't match an existing property or company — that row is still created, just left unassigned, and listed as a warning in the "Imported N expense(s)" confirmation so you can go fix it manually rather than losing the row entirely. A re-import of the same file skips rows that already exist rather than duplicating them, and the confirmation also reports how many rows were skipped as duplicates. Click **Export CSV** (or **Export CSV (shown)** once a search/filter is active — Section 9f) at any time to download everything currently matching your search/filter in the same column format, for your own records or to round-trip back through Import after editing in a spreadsheet. The same importer is also reachable from Settings → Import/Export (Section 20p) alongside the plugin's other bulk importers.

9f. Search, Filter & Sort

As of version 0.68.0, the Expenses list has a full search and filter panel, pinned just under the tabs as you scroll (on a phone it stays pinned while **More filters** is collapsed) so it's always at hand on a long list:

1. Type in the search box to match vendor, description, tax category, property address, check #, amount, or receipt file name — type several words and every one of them has to match somewhere, in any order.
2. Use **Dates** for a quick range (This month, Last month, Last 30/90 days, This year, Last year, or any year that actually has expenses in it), or set **From**/**To** directly for a custom range.
3. Click **More filters** to reveal: **Property / Company** (or "Not assigned"), **Tax category** (including hidden/retired ones still in use on old expenses), **Paid by**, **Receipt** (Has a receipt / No receipt), an **Amount from $ / to $** range, and **Sort** (Newest first, Oldest first, Amount high-to-low or low-to-high, Vendor A–Z). The button shows how many of these are active even while collapsed.
4. The summary line below the filters updates instantly, showing how many expenses match (out of the total) and the paid/tax totals for just what's shown.
5. Click **Clear search & filters** (next to the summary line, once anything is active) to reset everything except your chosen sort order.

Everything happens instantly in the browser — there's no server round-trip while you type or adjust a filter. A long list shows 150 expenses at a time with a **Show more** button at the bottom reporting how many are left; narrowing your search or filters always resets back to the first 150 of the new, smaller result.

> **Filters are remembered until you close the browser tab,** including across switching to another tab and back or editing an expense — so you don't lose your place. They reset the next time you open the Expenses tab in a fresh browser tab or window.

10. Apartment Inspection Checklist

A move-in (or any-time) inspection checklist a tenant fills out and signs themselves, which staff then review and finalize — replacing a paper walk-through form with one that's kept with the lease's own records.

10a. What It's For

Each lease can have one Apartment Inspection Checklist. It starts from a shared, staff-editable template (Section 10d) of condition items (default sixteen, covering things like walls, floors, appliances, plumbing fixtures, and smoke detectors), each answered Yes / No / N/A with a comment, plus a short statement and disclaimer. A tenant can add up to a configurable number of their own extra items (default six) for anything the standard list doesn't cover.

> **What's filled in is a snapshot, not a live link to the template.** The checklist's statement, item list, and disclaimer are copied onto the checklist itself the moment it's first created. If the template is edited later (Section 10d), every checklist already in progress or finalized keeps the wording it was created with — a later template change never silently rewrites a document that's already been signed.

10b. Filling It Out (Tenant Side)

From their My Lease tab, a tenant sees the checklist header "RESIDENTIAL APARTMENT LEASE INSPECTION CHECKLIST," a status badge, and a contextual notice for where things stand. For each item, they choose Satisfactory (Yes/No/N/A) from a dropdown and can add a Comment. They can click **+ Add another item** up to the template's maximum extra-item count, each removable again while the checklist is still a draft.

1. Answer every item (required before submitting).
2. Add any extra items of their own, if needed.
3. Read the disclaimer text.
4. Type their full name in the signature field and check **"I have inspected the apartment and this checklist is accurate."**
5. Click **Save Draft** at any point to come back later, or **Submit Checklist** once everything is answered and signed — submitting requires a signed name and an answer on every item, and emails staff that a checklist is ready for review.

Print is available to the tenant (or staff) at any point once the checklist has been started.

10c. Reviewing, Finalizing & Reopening (Staff Side)

Once a tenant submits, staff-only **Landlord notes** fields appear per item (hidden from the tenant unless the checklist has since been finalized), plus a general Landlord notes textarea. Staff actions:

- **Save Notes** — save landlord notes without changing status.
- **Finalize** — moves a submitted checklist to finalized, snapshotting the landlord's own name onto the record permanently; this is the action that also clears it from the Dashboard's Needs Finalizing card (Section 4a).
- **Return to Tenant** — moves a submitted checklist back to draft, so the tenant can correct and resubmit it.

A finalized checklist cannot be edited by the tenant again.

10d. Editing the Template

Under Settings → Apartment Checklist (Section 20l), staff can edit the opening statement, the disclaimer text, the list of standard items (add, remove, reorder, or reword), and the maximum number of extra items a tenant may add. Changing the template only affects checklists created afterward (Section 10a) — it never rewrites one already saved.

11. Lease Amendments

A formal, signable change to an existing lease — adding a tenant, removing a tenant, allowing a pet, or any other custom change — drafted by staff, sent to the tenant for an electronic signature, and finalized once everyone's satisfied.

11a. What It's For

An amendment starts from one of four templates, each with its own blank fields to fill in and its own wording, and moves through a simple lifecycle: **draft → sent → signed → finalized** (a sent amendment can also be withdrawn back to draft, and a signed one sent back to sent for a re-sign).

Template	Used For
Add a Tenant or Occupant	Adding a new person to an existing lease.
Remove a Tenant	Taking a tenant off the lease; includes an extra "Outgoing Tenant" signature line.
Allow a Pet	Adding pet permission (and any related fee/deposit) to the lease.
Other Amendment	A blank template for anything else.

11b. Drafting an Amendment

1. From the lease's Amendments area, click **+ New Amendment**.
2. Pick the **Lease** (locked once pre-selected from a specific lease) and the **Amendment type** (locked once the draft is created).
3. Set the **Effective date**.
4. Fill in the template's own blank fields (plain text or a larger text area, depending on the field).
5. The **Wording** editor auto-fills from the template about 350ms after you stop typing in the fields above, substituting in your answers plus automatic tags like the lease date, tenant names, property address, unit, and today's date. A **Re-fill from template** button is available if you want to regenerate it; once you've hand-edited the wording yourself, it's marked "touched" and stops auto-refilling so your edits aren't overwritten.
6. Signature lines are added automatically — no need to type them into the wording yourself.
7. **Save Draft**, **Save & Send to Tenant**, **Delete Draft**, or **Cancel**.

11c. Sending, Signing, Finalizing & Withdrawing

Once sent, a tenant sees the pending amendment on their My Lease tab, with the full document preview, a checkbox agreeing to it, and a field to type their full name as a signature. Staff see a review window with a status badge, who signed and when (and who finalized, once finalized), the document preview, and these actions:

- **Finalize** — only available once signed; a confirmation warns this is "permanent and can no longer be changed."
- **Send Back to Tenant** — moves a signed amendment back to sent and clears the existing signature, for a re-sign.
- **Withdraw to Draft** — pulls a sent (not yet signed) amendment back to draft for more editing.
- **Print** and **Close**.

A signed-but-not-yet-finalized amendment is one of the two things counted on the Dashboard's Needs Finalizing card (Section 4a), alongside submitted inspection checklists.

11d. Editing the Amendment Templates

Under Settings → Lease Amendments (Section 20m), staff can edit each of the four templates' blank fields and default wording. A set of system tags — lease date, effective date, company name, tenant names, property address, unit label, and today's date — can be dropped into any template's wording and are substituted automatically when a real amendment is drafted from it.

12. Work Orders (Maintenance)

12a. Submitting a Work Order

A work order can be created two ways: by staff from a unit's Maintenance tab, or by a tenant from their own account's My Lease tab (tenants can only submit for their own unit, and must be logged in to do so). Every work order captures:

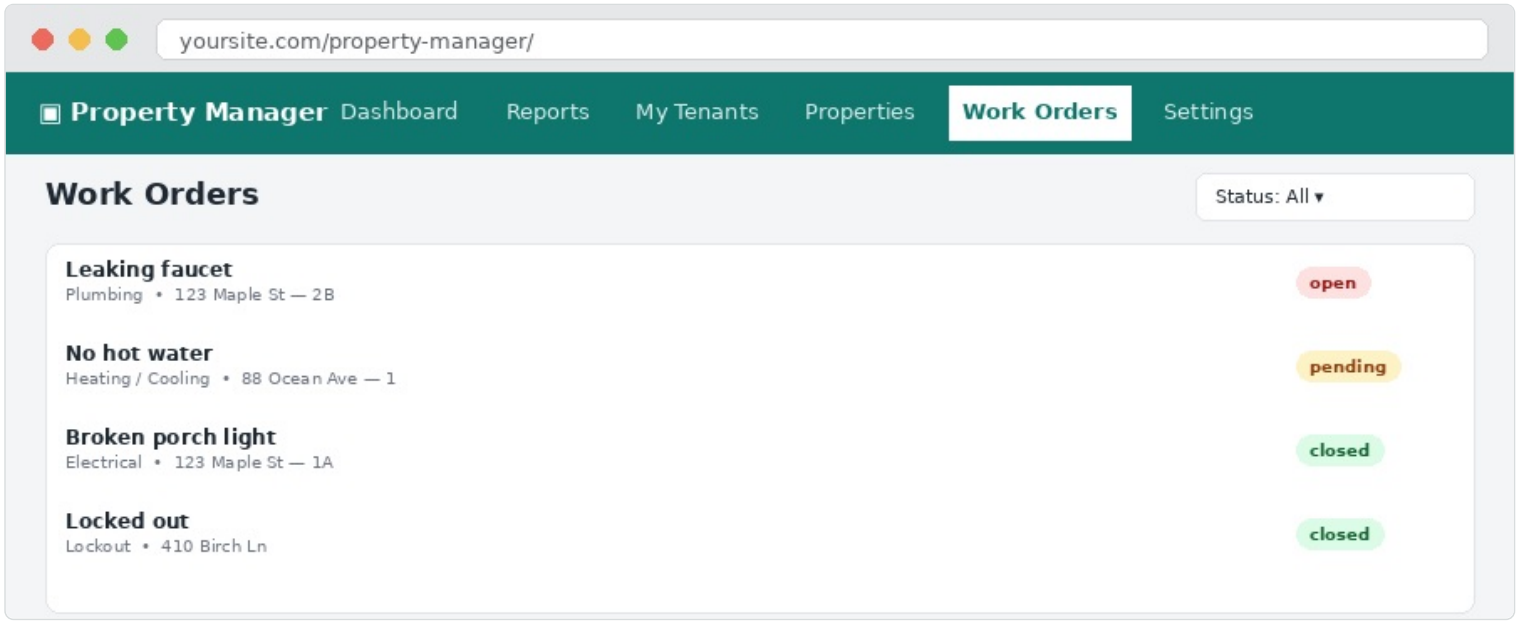
- **Nature of Issue** — a staff-editable list of categories (Section 12c).
- **Title** and **description**.
- **Images** — attached from the device.

> **Image attachments are still a preview only, not a real upload.** This remains a known, unfixed limitation: attached photos still show as a local preview in the browser but aren't uploaded to a permanent WordPress media location yet. (Expenses' receipt images, Section 9d, already use a real upload — this is a different, still-not-built part of the plugin.) Don't rely on attached work-order images surviving beyond the current browser session.

Submitting a work order also emails a staff notification address, set under Settings → Emails & Auto Late Fees (Section 20j) — unless the plugin's master email-pause switch (Section 8k) is on.

12b. The Work Orders Tab

Besides the per-unit Maintenance tab, there's a dedicated cross-property **Work Orders** tab in the main navigation, with a status filter (All / Open / Pending / Closed) so staff can triage everything at once instead of unit by unit.



The Work Orders tab, filterable by status across every property.

Staff (with the Manage Maintenance permission) or the original submitter can edit a work order's details; only staff with that permission can change its status. Marking a work order **closed** records the closing timestamp automatically.

12c. Nature of Issue Reference & Customization

The built-in starting list:

Kind	Label Shown
plumbing	Plumbing
electrical	Electrical
hvac	Heating / Cooling
appliance	Appliance
pest	Pest Control
minor_damage	Minor Damage / Repair
lockout	Lockout
safety	Safety / Urgent
other	Other

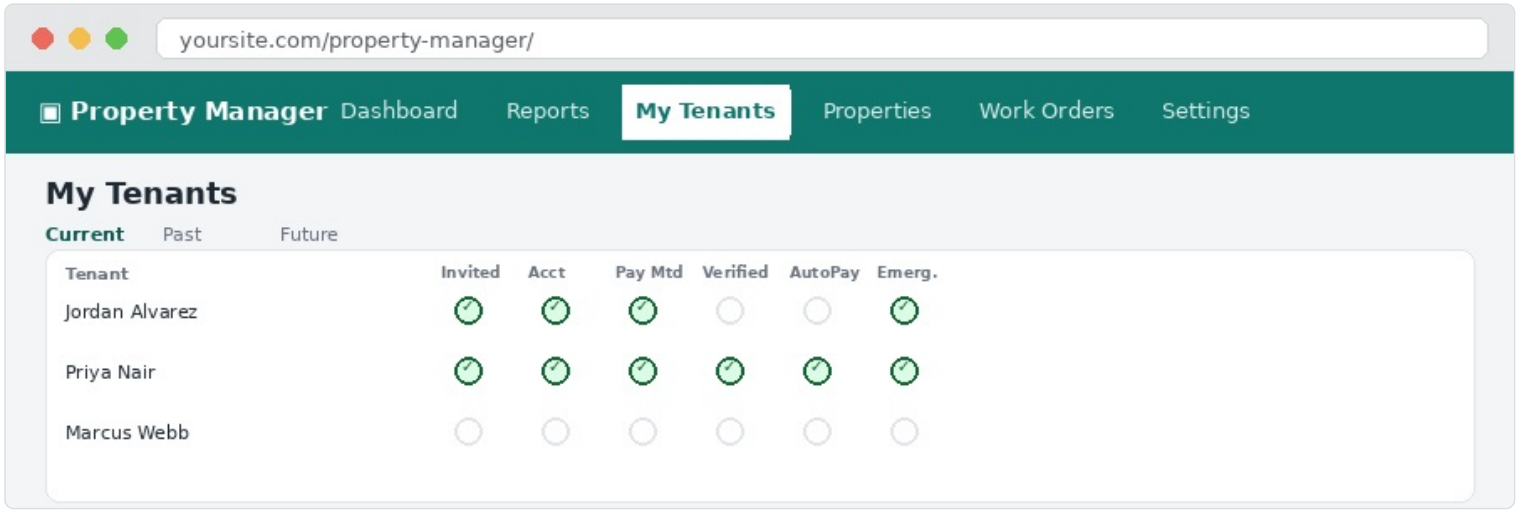
This list is not fixed — under Settings → Work Orders (Section 20k), staff can rename any entry, reorder the list with up/down arrows, remove an entry, or add a new one of their own. **Other** stays locked in place as a required catch-all and can't be removed.

13. My Tenants

My Tenants is a dedicated onboarding tracker, separate from any tenant's actual account — it's where staff see, at a glance, how far along every tenant is in setting up their frontend account. It's also the same list managed in more detail under Settings → Tenant Logins (Section 20c).

13a. The Onboarding Tracker

Scoped by tab to **Current**, **Past**, or **Future** tenants (based on their lease's start/end dates relative to today), the tracker shows one row per tenant with six togglable status columns:



My Tenants — six onboarding-status columns, clickable to toggle.

Column	What It Tracks
Invited	A login-setup invite has been sent.
Account Created	Their plugin-owned tenant login has a password set.
Payment Method Added	A card, bank account, or PayPal has been linked.
Payment Method Verified	That payment method has been confirmed usable.
AutoPay Ready	Automatic recurring payment is set up.
Emergency Contact Added	An emergency contact is on file.

Each circle icon is directly clickable to toggle that status on or off — useful for recording something that happened outside the system (e.g. a tenant emailed a photo of a voided check). **AutoPay Ready** is still a manual staff checkbox here, separate from whether the tenant has actually turned AutoPay on for themselves (Section 8i) — it's meant for your own onboarding record-keeping, not a live status.

13b. Inviting or Re-Inviting a Tenant

Clicking **Invite** (or **Re-invite**) on a tenant row:

1. Makes sure that tenant-tracking row has a username (defaulting to their email, the first time this runs).
2. Emails a one-hour link to set (or reset) their password, followed by the Access URL to log in at once it's set.
3. Marks that tenant's **Invited** column on.

This always reads the row's *current* email at the moment you click — so if you just fixed a typo'd address, re-inviting right away sends to the corrected one, with no stale lookup in between. This invite email sends even if the master email-pause switch (Section 8k) is on, since it's a deliberate staff action rather than an automated notice.

> **If the invite email doesn't send, the error tells you why.** A failed invite reports the specific reason — no email on file for that tenant, or the send itself failing (`wp_mail_failed`). A `wp_mail_failed` result usually means your host is blocking PHP's default mail() function; installing an SMTP plugin such as WP Mail SMTP typically fixes it. GoDaddy is a common example of a host that blocks default mail() outright.

13c. Adding a Co-Tenant to a Lease

A lease can have more than one tenant-tracking row — useful for roommates, spouses, or any co-tenants who should each get their own login and their own onboarding status. Add one from the lease's tenant list; each gets invited and tracked independently, and can be removed individually without affecting the others or the lease itself. If more than one tenant on the lease shares the same email address, they can still each keep their own password (Section 3b).

13d. Removing & Restoring a Tenant

Removing a tenant from a lease doesn't delete their record outright — it's a soft removal that stamps a removed date on the row and keeps it (and all of that

tenant's payment history) intact, hidden from the normal current-tenant views. A **Restore** action brings a removed tenant back. A property's tenant history also shows every tenant who's ever lived there, current and past, not just whoever's there today.

> **A removed tenant can't sign in.** Their login is blocked the moment they're removed, even though the underlying record and payment history are preserved rather than deleted — restoring them re-enables the login again.

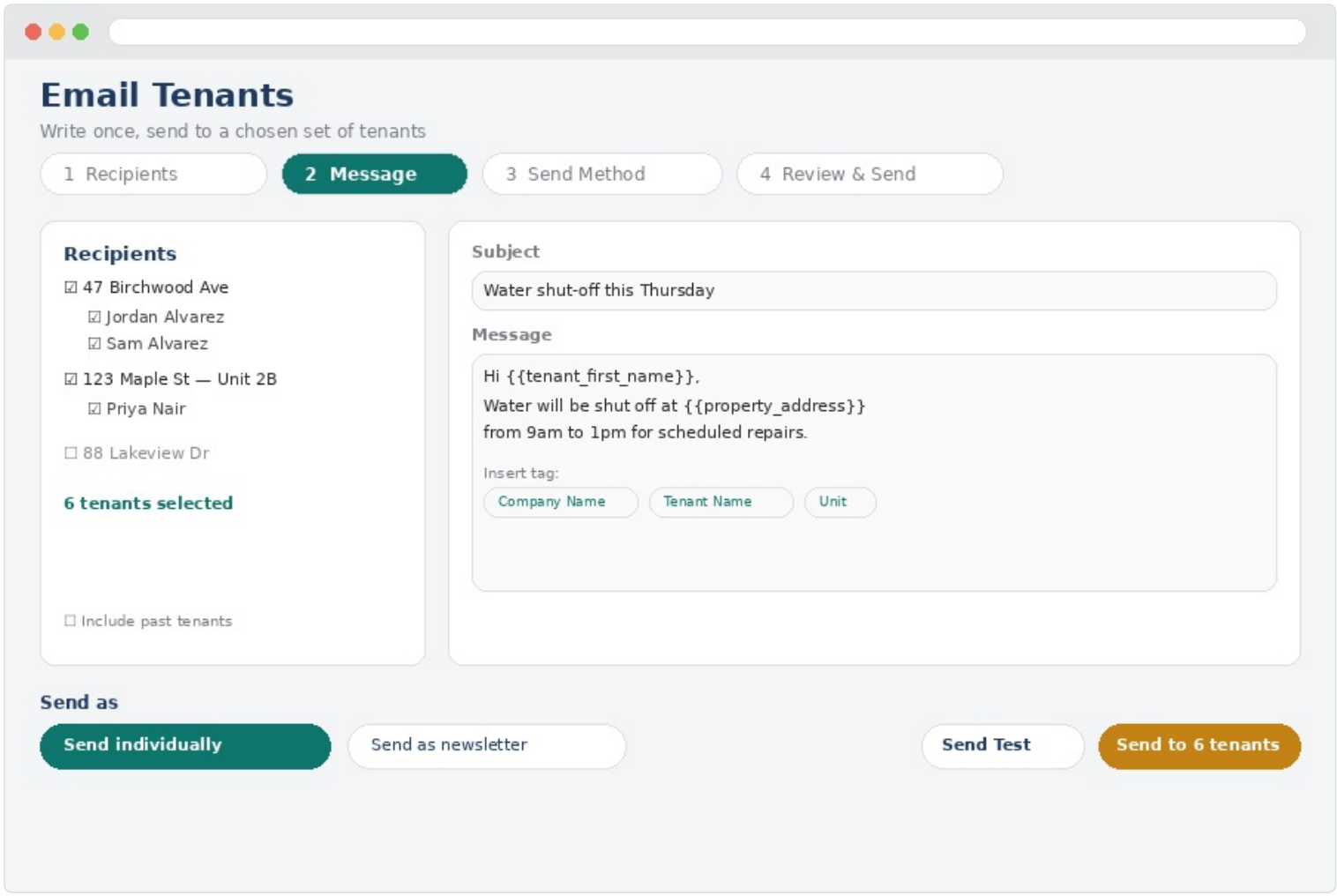
13e. Viewing an Account as a Tenant

Staff with the **View as Tenant** permission can search for and select any tenant to see exactly what they see — read-only, for troubleshooting "what am I supposed to see" questions without needing the tenant's login. A clearly labeled **"Viewing as: {name}"** banner stays on screen the whole time, with a one-click **Switch back to Staff View** to exit.

> **New in version 0.71.1 — this preview now includes payment options too.** Earlier, Tenant View left out "Other ways to pay" (Section 8h) and the Pay Now button; both now show exactly as the tenant sees them. Pay Now opens the same window a tenant would get, labeled **"Preview — Pay {charge}"**, and a note explains that nothing can actually be paid from here — attempting to pay shows "Preview only — in Tenant View nothing is charged. The tenant's own login goes on to the secure payment page from here."

14. Email Tenants

New section. A way to write one message and send it to a chosen set of tenants — a water shut-off notice, a holiday closure, a reminder about something that isn't an automated template — either as individual personal emails or as a tracked newsletter campaign, without leaving the dashboard.



The Email Tenants compose flow — recipients, message, send method, and review.

14a. What It's For

The **Email Tenants** tab (shown to staff with the Manage Tenants permission) is a four-step compose flow — who gets it, the message, how to send it, and a final check — plus a **Sent** tab showing a log of everything sent from here.

14b. Choosing Recipients

The recipient picker groups tenants by property, then by lease/unit, with a checkbox at every level: tick a whole property, a whole lease (everyone on it), or individual people. A search box filters by name, email, or property, and **Select everyone shown**/**Clear** speed up a broad send. A **"Include past tenants"** checkbox widens the list beyond current tenants when needed. Anyone without an email on file is shown but can't be selected.

14c. Writing the Message

An optional **Start from...** dropdown loads either one of your own saved messages or, if SL Email Marketing is active, one of its newsletter templates. The editor has a Subject line and a rich-text body, with clickable merge tags grouped as Company (name, address, phone, email, logo — from the recipient's property's Owning Company), Tenant (name, first/last name, account login link), and Lease (property address, unit, monthly rent, next amount due, next due date — direct email only, see Section 14d). **Save as a message** stores the current subject and body for reuse later; a saved message can also be deleted from the same dropdown.

14d. Sending Individually vs. as a Newsletter

Method	What Happens
Send individually	One personal email per tenant, sent "from" the company that owns their property, with every tag filled in with that tenant's own details.
Send as a newsletter	Handed to the separate SL Email Marketing plugin (only offered when that plugin is active): batched sending, open/click tracking, and an unsubscribe link, grouped into one campaign per owning company so each goes out under the right name. Tenants who have already unsubscribed from your newsletters are skipped automatically. Tags that differ per tenant (property, unit, rent, amount due, due date) can't be filled in on a newsletter and are left blank — a warning says so right on the screen. Optionally, one or more of SL Email Marketing's own subscriber lists can be added to the same send.

14e. Preview, Test & Send

Preview shows the message as a tenant would see it. **Send Test** emails one rendered copy — filled in using the first selected tenant's real details — to an address you choose, without logging it or counting toward anyone's Sent history. **Send to N tenants** asks for confirmation ("This can't be undone"), then reports how many were sent, failed, and skipped, with a reason listed for each skip (no valid email, already unsubscribed, duplicate address on two leases, and so on).

14f. The Sent Tab

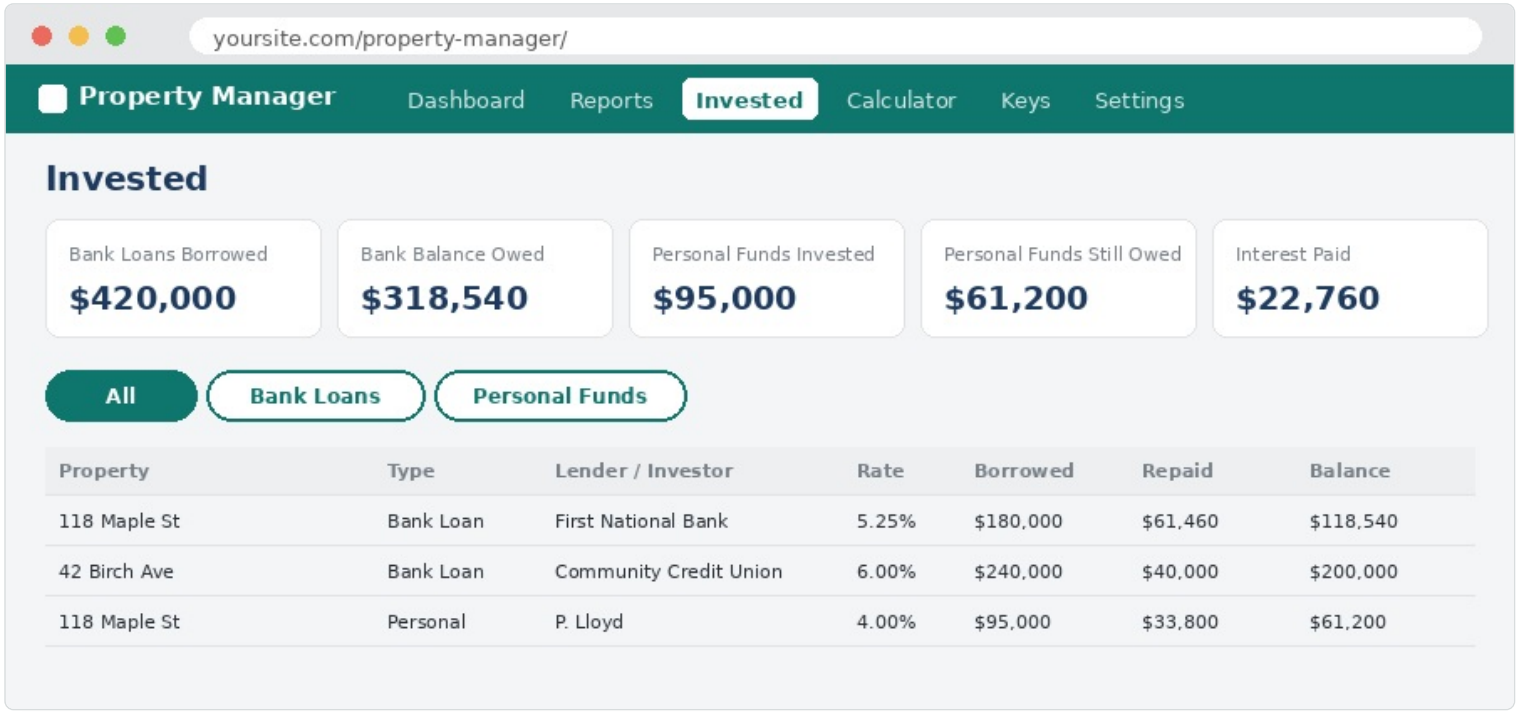
Every send is logged: date, subject, method (Direct/Newsletter), recipient/sent/failed/skipped counts, and who sent it. **View** opens the rendered message plus the full recipient list, and for a newsletter send, its current open/click/pending/failed stats pulled live from SL Email Marketing.

15. Invested

A record of where the money behind your properties actually came from — bank loans and personal funds put in by you or other investors — and how much of each has been paid back.

15a. What It's For

The **Invested** tab shows five stat cards at a glance — Bank Loans Borrowed, Bank Balance Owed, Personal Funds Invested, Personal Funds Still Owed Back, and Interest Paid — plus a filterable table (All / Bank Loans / Personal Funds) with columns for Property, Type, Lender/Investor, Reference, Start, Matures, Rate %, Borrowed/Invested, Repaid, and the running Balance.



The Invested tab — stat cards, filter tabs, and the loans/personal-funds table.

15b. Adding a Bank Loan or Personal Funds Entry

1. Click **+ Add** and choose **Bank Loan** or **Personal Funds**.
2. Pick the property it's tied to.
3. Enter the lender or investor name, an optional reference number, start date, maturity date (if any), interest rate, and the amount borrowed or invested.
4. Save.

15c. Recording Repayments

Each row's **Repayments** action opens its own running list of payments made against that loan or investment, each split between principal and interest — the Balance shown on the main table is always the original amount minus (total paid minus interest paid), so interest paid reduces what you owe toward interest but not toward the underlying principal balance. **Edit** and **Delete** are also available per entry.

15d. The Investments Report

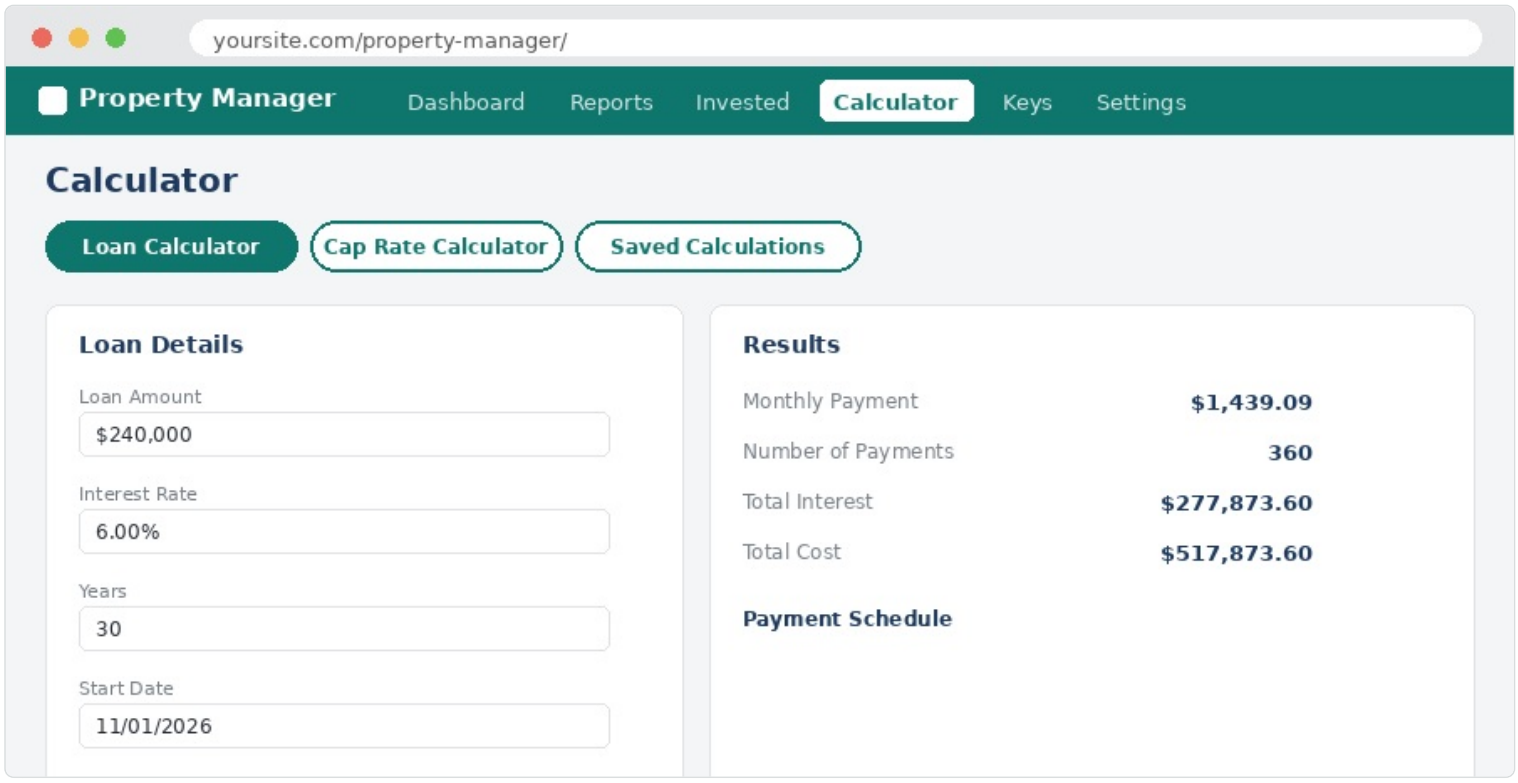
The Investments by Lender report (Section 19a) groups every entry by lender/investor name (showing "(no name)" for any left blank), with a totals row per lender and a comparison column showing what was owed as of a chosen date some number of years back — the number of years is configurable under Settings → Reports (Section 20n) — using the same side-by-side comparison style as the Late Payments report.

16. Calculator

Two quick financial calculators for sizing up a loan or a potential acquisition, without leaving the dashboard.

16a. Loan Calculator

Enter a loan amount, interest rate, number of years, and start date to get the monthly payment, number of payments, total interest, total cost, and a full month-by-month payment schedule table.



The Calculator tab — Loan Calculator, Cap Rate Calculator, and Saved Calculations sub-tabs.

16b. Cap Rate Calculator

Enter gross rents, a vacancy percentage, CAM charges, other income, taxes, insurance, maintenance, management fees, utilities, capital expenditures, and a purchase price to get gross rents, vacancy loss, gross income, total expenses, net operating income (NOI), and the resulting cap rate.

16c. Saved Calculations

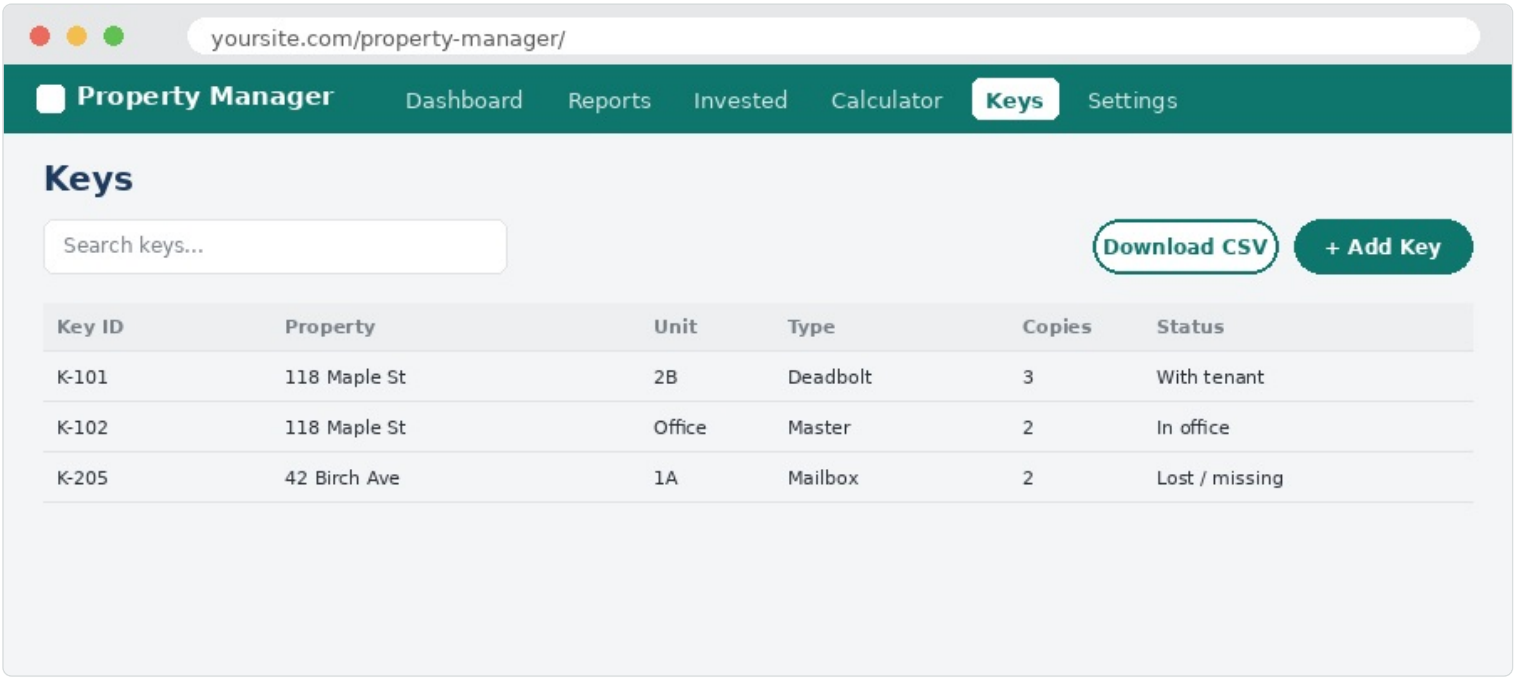
Either calculator can be saved with **Save** (overwrite) or **Save as New** (keep both), then revisited later from the **Saved Calculations** sub-tab, downloaded, or printed. **Start New** clears the form for a fresh calculation. A short **Useful Resources** link list sits alongside both calculators.

17. Keys

A simple register of physical keys — which unit, building, or company they belong to, how many copies exist, and where they currently are.

17a. The Key Register

The **Keys** tab lists every key with a search box, a **Download** CSV export, and columns for Key ID, Property, Unit, Type, Copies, Status, and Notes. Click the **Key ID** or **Property** column heading to sort A–Z or Z–A; the download follows whatever order is on screen. Keys with no property or company assigned sit in their own **Unassigned** section at the bottom, separate from the sortable list.



The Keys tab — register of physical keys with status and copy counts.

Status	Meaning
With tenant	Currently held by the tenant.
In office	Held on-site/in the office.
Lost / missing	Unaccounted for.
Other	Anything else — use Notes to explain.

17b. Adding & Editing a Key

1. Click **+ Add Key**.
2. Enter a unique **Key ID** (a duplicate ID is rejected).
3. Under **Property or company**, pick a property (or a company — Section 17c), then a **Unit** if it belongs to one specific unit.
4. Enter a key type, number of copies, status, and any notes.
5. Save.

Edit and **Delete** are available from each row.

17c. Building Keys & Company Keys

Picking a property but leaving **Unit** on "Whole building (no unit)" saves a **building key** — the front door, basement, or other shared areas — shown as *Building* in the Unit column rather than a specific unit. Picking a company from Settings → Property Ownership instead of a property saves a **company key** (office, shared equipment, and similar) with no property or unit attached at all; the Property column shows that company's name. The Keys CSV importer follows the same rule: a row with a street address but no unit (or a unit it can't find) becomes a building key, and a street address that actually matches a company name saves against that company instead.

18. Property Info

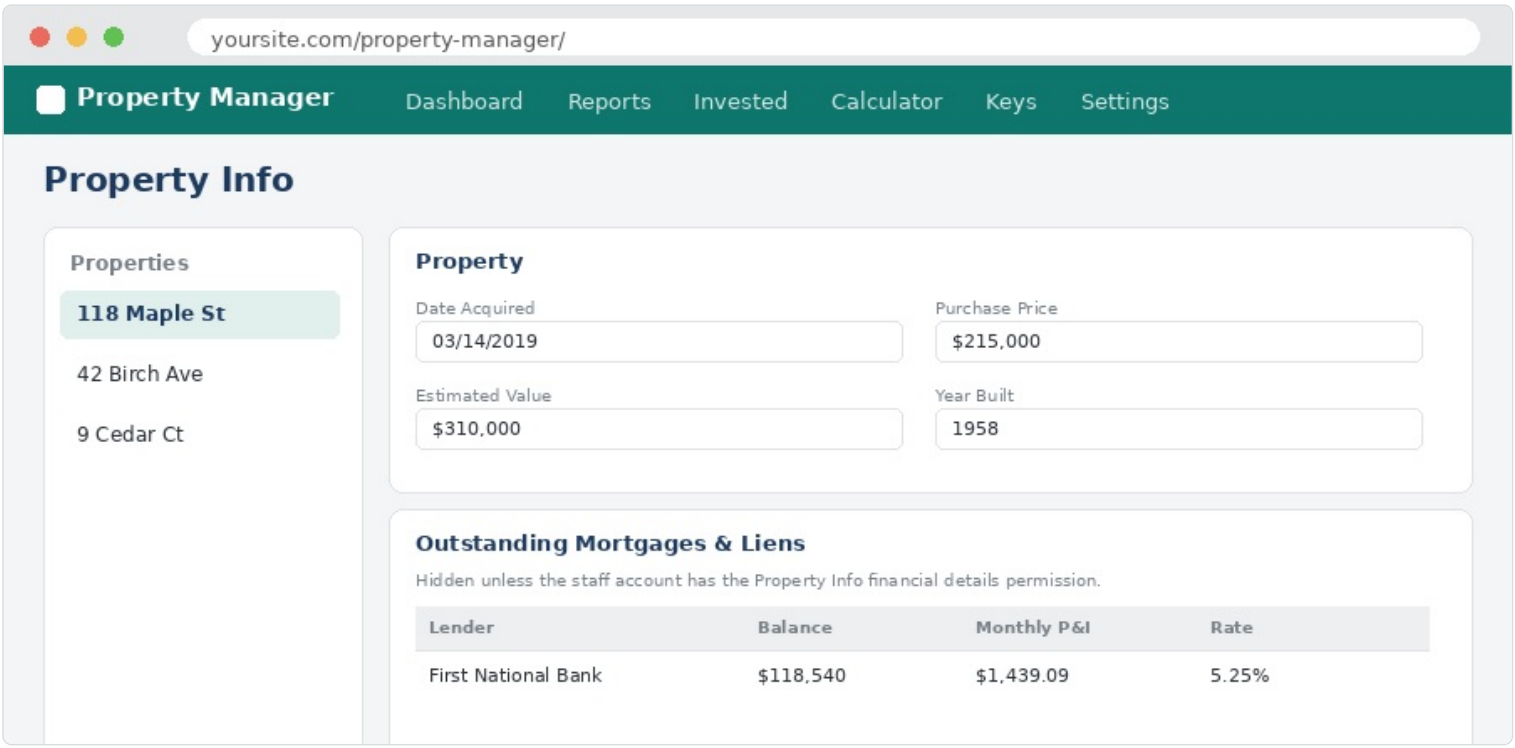
A detailed, per-property record — building characteristics, mortgages, roof/plumbing/HVAC details, and free-form notes — kept separate from the basic Properties & Units record (Section 5) and built specifically to feed reporting.

18a. What It's For

Property Info is reached from its own tab, with a sidebar list of properties down the left side. Selecting one shows several panels:

- **Outstanding Mortgages & Liens** — a repeating list of mortgages/liens against the property; feeds the Real Estate Schedule report.
- **Property** — Date Acquired, Purchase Price, Estimated Value, Building Style, Schedule Type, Occupancy, Ownership, Parcel #, Year Built, Sq Ft, and Lot Sq Ft.
- **Roof / Plumbing / Heating & Hot Water** — roof year/type, plumbing year/type, and repeating lists for HVAC/boiler units and hot water heaters.
- **Description & Notes** — free text.
- **Anything Else** — your own custom key/value pairs for anything the form above doesn't cover.

> **Purchase Price and Outstanding Mortgages & Liens are permission-gated.** Both are hidden from any staff account that doesn't have the "Property Info financial details" permission (Section 21) — and that permission is **not** included by default even for the Manager role preset, only Admin. Check Settings → Staff Logins (Section 20b) if a manager-level staff member needs to see this financial detail.



The Property Info tab — property sidebar and the panel-based detail form.

18b. Filling In a Property's Info

Select a property from the sidebar, fill in whichever panels apply, and save — every field is optional, so a property can be filled in gradually over time rather than all at once.

18c. Filling From Your Spreadsheets (Seed Import)

A one-click **"Fill from my spreadsheets"** button (found in the Import/Export settings, Section 20p) matches properties to a bundled starting data file by normalized street address ("house number + street name") and fills in only the fields that are currently empty — it never overwrites something already entered by hand.

18d. Property Info Reports

Three reports draw directly from this data (Section 19a):

Report	What It Shows
Real Estate Schedule	"Schedule of Real Estate Owned" — one row per property with owner %, type, units, occupied status, acquired date, purchase price, estimated value, outstanding mortgages, lender name, monthly P&I, gross rent, and prior-year taxes/insurance/utilities, plus lease expiration or "Mo to Mo."
Rent by Unit	Rent per unit with a subtotal per property.
Property	A flat dump of every Property Info field for every property.

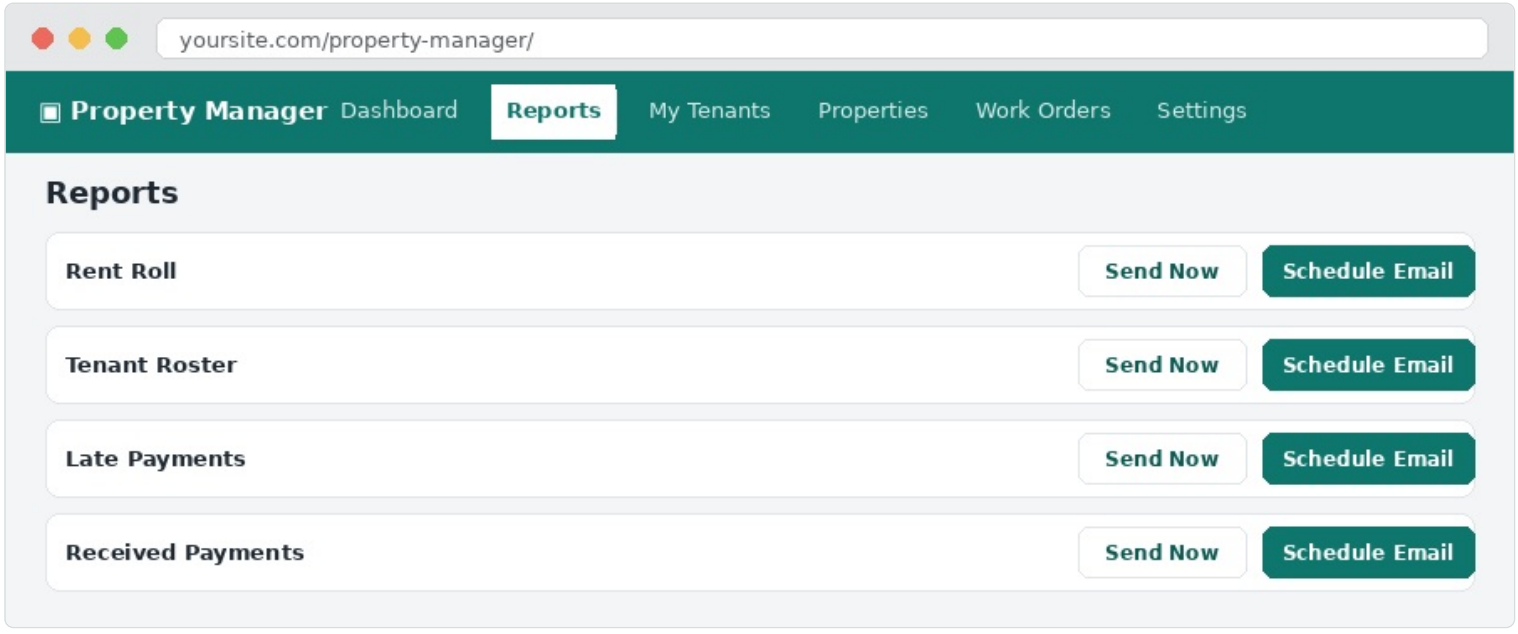
General
Info

19. Reports

19a. The Report Types

The built-in gallery covers seventeen report types:

Report	What It Shows
All Listings	Every website listing, in plain language rather than raw data — property, unit, on-website/available status, price, beds/baths/size, amenities, utilities, parking, pets, the rent special if any, contact details, and a readable count and list of photo links. (The old, always-empty Title column is gone.)
All Applications	Every rental application on file.
All Leases	Every lease, active and archived.
All Payments	Every payment line item, any status.
All Maintenance	Every work order, any status.
Rent Roll	Active leases only — address, unit, tenant names, monthly rent, security deposit, lease dates, and bedroom count.
Tenant Roster	Active leases only — current unit address, tenant name, email, phone, and payment method on file/verified status.
Late Payments	Overdue payments, with tenant, unit, and address; split by active vs. past leases.
Received Payments	Paid/processing payments, most recent first.
Leases Expiring	Active leases ending within 90 days.
Investments by Lender	Loans and personal funds grouped by lender/investor (Section 15d).
Annual Tax Summary	A chosen year's income and deductible expenses, with the option to split company-level shared expenses equally across that company's properties.
Annual Tax Report – Expense Breakdown	One row per property, one column per tax category used that year, plus a Total Expenses column (Section 19f).
Property Profitability	Income minus categorized expenses per property per year, labeled "In the black," "In the red," or "Break even," plus a purchase-price-adjusted "ALL YEARS" row.
Real Estate Schedule	See Section 18d.
Rent by Unit	See Section 18d.
Property General Info	See Section 18d.



The Reports tab — Send Now and Schedule Email are available per report.

Which of these appear, and in what order, is configurable — see Section 20n.

19b. Sorting & Reading Long Cells

Click any column heading to sort a report ascending, click again for descending; a **Back to default order** button appears while a sort is active. Totals rows always stay at the bottom regardless of sort, and empty cells always sort last. The same sortable table is used for the Dashboard's click-through detail lists (Section 4b).

Any cell longer than 60 characters shows a short preview ending in **"... more"**; clicking it opens the full text in a window (useful for a long description or a list of photo links, which render as clickable links inside that window).

New: the table scrolls itself on a long report. A report's table now sizes itself to fill the remaining window height and scrolls on its own, rather than pushing the page down — with the header row, and the first column (and the second column too, when the first is a narrow one like "Year" or "#"), staying pinned in place as you scroll. A horizontal scrollbar stays visible along the bottom at all times rather than only appearing at the very bottom of the page.

19c. Downloading as Excel or CSV

New. Every report can now download, Send Now, or Schedule Email as a real Excel **(.xlsx)** file, not just CSV. A **format picker** — two checkboxes, **Excel (.xlsx)** and **CSV** — sits next to Download/Send Now/Schedule Email everywhere on the Reports page, and whichever one(s) are ticked are remembered on that computer (in the browser's own storage) for next time. At least one box always stays ticked — unchecking the last one is blocked, with a tooltip explaining "At least one file type stays ticked."

The generated Excel file is formatted for actually reading, not just a data dump: a frozen header row, money formatted with commas and negative amounts in red brackets, bold TOTAL/GRAND TOTAL rows, alternating shading between sections, an automatic SUM-formula TOTAL row added to any list that doesn't already have its own, and the page set to print landscape, one page wide.

19d. Send Now

1. Click **Send Now** on any report.
2. Enter one or more email addresses (comma-separated).
3. The report is generated and emailed immediately in whichever file format(s) are currently selected (Section 19c) — this always sends, even while the master email-pause switch (Section 8k) is on.

19e. Schedule Email

1. Click **Schedule Email** on any report.
2. Choose a frequency: **Daily**, **Weekly** (pick a day of week), **Monthly** (pick a day of month, 1–28), or **Annual** (pick a month and day of month).
3. Choose the file format(s) to attach (Section 19c), and for the Annual Tax Report — Expense Breakdown (Section 19f), whether to split common expenses (its own setting is saved with the schedule).
4. Set a send time and one or more recipients.
5. Save. Existing schedules for that report are listed inline so you can see or remove them.

> **Schedule times are hour-accurate, not minute-accurate.** The underlying check runs on WordPress's own hourly cron, so a schedule fires sometime within the hour you set rather than at the exact minute — a known limitation of shared-hosting cron, same as noted for other Streamline plugins that use scheduled email. A scheduled report is skipped entirely while the master email-pause switch (Section 8k) is on.

19f. Annual Tax Report – Expense Breakdown

New report. One row per property, one column per tax category, a **Total Expenses** column, and a TOTAL row — a finer-grained companion to the Annual Tax Summary (Section 19a). The current year lists every category shown in the Expenses picker (Section 9b); a past year lists only the categories actually used that year, shown categories first, then hidden/retired ones, so an old report keeps reading the way it did at the time even if a category's since been renamed or hidden.

It has its own **Tax year** picker, and its own **"Divide company common expenses evenly across its properties"** checkbox — remembered on this computer like the format picker, and defaulting to on. This checkbox (and its Download/Send Now/Schedule Email counterpart, saved as its own column on a schedule) controls whether a company-level shared expense (Section 9a) is split evenly across every property that company owned by that year's end (by Date Acquired, Section 18a), or left out of this particular report entirely when unchecked. The same split setting is shown and changeable from Settings → Reports (Section 20n), and the Annual Tax Summary and Property Profitability reports show a short note under their own titles describing how the current split setting is affecting their numbers.

19g. Custom Reports

Beyond the sixteen built-in report types, staff can define their own custom reports under Settings → Reports (Section 20n):

1. Click **+ New Custom Report**.
2. Name it, and choose a **data source** — one of eight: Payments/Charges, Money Received, Leases, Tenants, Work Orders, Applications, or Units.
3. Check which columns from that source to include.
4. Optionally add a status filter, a days-of-recency filter, and a sort field/direction.
5. Save.

A saved custom report then behaves exactly like any built-in one — it shows up in the main Reports tab, and has its own Send Now and Schedule Email options, right alongside the built-in gallery.

> **New in version 0.74.0 — a Money Received report can be scoped to specific people.** On a custom report with the **Money Received** source and its

Received By column checked, a new panel lists every name that's ever received a payment — tick one or more to include only payments those people took, or leave everyone unticked to include all of them (a **Clear — show everyone** link resets it). A payment with no Received By recorded is covered by its own **"(no name)"** entry in the list.

20. Settings

All settings live inside the app itself at the Access URL (or the wp-admin fallback, Section 2d), under the Settings tab. It's one consolidated screen, with seventeen sub-tabs:

20a. General (Access URL, Login Screen & Email Pause)

Change the **Access URL slug** — the part after your domain (default `property-manager`). Saving a new slug updates the rewrite rule immediately; the old address stops working as soon as you save, so update any bookmarks or links you've shared.

An **Email Notifications** panel holds the master switch described in Section 8k — **"Turn off ALL email notifications (until you go live with the plugin)"** — with helper text that changes depending on whether it's currently on or off, so the screen always makes clear which state you're in before you leave the page.

New: login screen and website sign-in options (Section 3f), saved together with the Access URL:

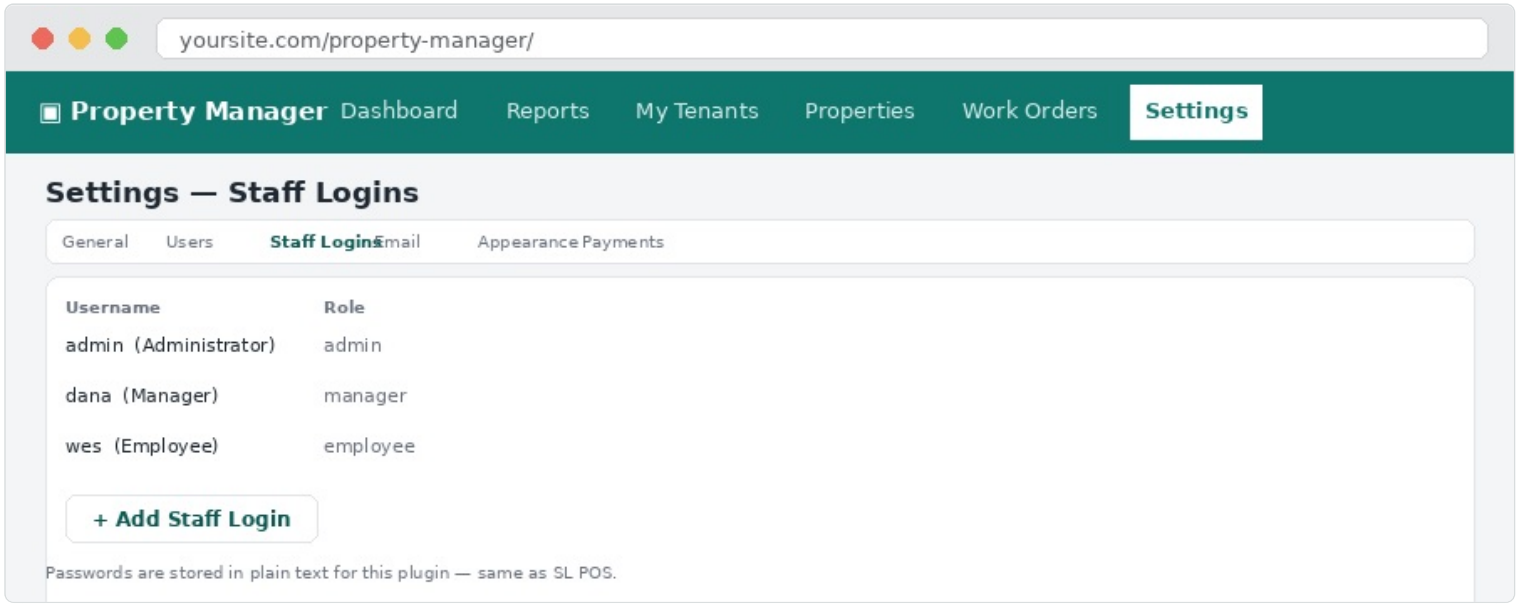
- **Show the login screen at the Access URL** — off sends a signed-out visitor to a page you choose instead.
- **After Log Out, go to** (labeled **After Log Out, and for signed-out visitors, go to** when the login screen above is off) — this box is now always shown, not just when the login screen is off. Leave it blank to use your site's home page.
- **Hide the "New Here?" section** on the Access URL's own login card, plus where its two links (**Create Tenant Account** / **Create Landlord Account**) go — a link left blank just doesn't show, and the whole section disappears if both are blank.
- **Sign In button color** — a color picker; the Tenant/Landlord toggle buttons and links use the primary color from Settings → Appearance (Section 20o) instead.
- **Login cards for your website** — copy-paste HTML (and matching shortcodes) for the three ready-made login cards (Section 3f), each with its own "hide New Here?" checkbox that only affects that pasted card.

> **Changed: clicking Log Out now leaves the plugin entirely.** Staff/landlord and tenant Log Out used to just reload the page, landing back on the plugin's own login screen. It now sends the signed-out visitor to your website instead — the address in **After Log Out, go to** above, or your site's home page if that's blank. If that address can't be read for any reason, Log Out still falls back to the home page after a few seconds rather than getting stuck.

Below that, the **Install the Frontend Access Code Snippet** card has a **Copy Code Snippet** button and a read-only code box with the exact current snippet — see Section 2c for the full install steps. If this card shows an error instead of a Copy button, the plugin's own bundled copy of the snippet file is missing; reinstalling the plugin restores it.

20b. Staff Logins

Manage plugin-owned Staff Login accounts (Section 3a) — add, edit, or remove staff, set a role preset (Admin / Manager / Employee, each with different default permissions per Section 21), and override individual permission toggles per account if the preset isn't quite right. A staff account can also be narrowed to only certain report types or only certain Settings tabs, for a staff member who should have a permission in general but not every specific report or settings screen it would otherwise unlock.



Settings → Staff Logins — plugin-owned accounts, separate from WordPress users.

> **Passwords are stored in plain text.** This is a deliberate trade-off (the same one SL POS makes) so a device can log in with a simple staff PIN without ever touching a WordPress account. Don't reuse a sensitive personal password for a Staff Login account. Set a minimum length or character requirements under Settings → Login Security (Section 20d) if you want to enforce something stronger than nothing at all.

20c. Tenant Logins

Every tenant login across every lease, in one place — the same accounts tracked in My Tenants (Section 13), but with full edit access: fix contact info, set a password directly, or send/re-send the setup email, without drilling into Properties → a unit → the lease. Each row shows the tenant's name, username/email, unit, invited badge, and contact details, with search across all of them, and a way to see and restore a removed tenant (Section 13d).

A note at the top of this screen is a reminder worth repeating here too: these are plugin-only tenant logins, not WordPress accounts — the same model Staff Logins use (Section 1b).

20d. Login Security

Settings shared by both Staff and Tenant logins, each configurable separately for the two groups:

Setting	Controls
Staff / Tenant Password Requirements	Minimum length (4–64 characters), and optionally require an uppercase letter, a lowercase letter, and/or a symbol. Applies the next time a password is set or changed — an existing password isn't forced to change retroactively.
Email Verification (Staff / Tenant)	Requires a 6-digit code emailed at login, valid for 10 minutes, for that group (Section 3d).
Remember This Device	Lets someone check "Remember this device for 10 days" when verifying a code, so it isn't asked again on that browser until the 10 days are up. Only usable once at least one of the two Email Verification settings above is on.

20e. Property Ownership

The companies/LLCs your properties are held under — a short, reusable list rather than typing the same name, address, phone, email, and logo into every property. Each entry has a name, address, phone, email, and an optional logo URL. Pick one for a property under Properties → that property → Owning Company (Section 5c); automated tenant emails for that property then use this company's branding instead of your site default, including the sender address for those emails. A company on this list can also be picked when registering an office or equipment key (Section 17c).

20f. Property Documents

Documents (lease addenda, house rules, disclosures, and similar) that should show up automatically on the Documents tab for every tenant on a property — current and future — without re-attaching them lease by lease (Section 7c):

1. Click **+ Add Document**.
2. Give it a **Title**, then either upload a file directly or paste a document URL — **new:** uploading can also file straight into an SL Media Folders or FileBird folder, the same picker Expenses' receipts use (Section 9d).
3. Choose scope: **All current and future properties**, or **Choose properties** to hand-pick which ones it applies to (with Select all/Clear).
4. Save.

A document added here appears immediately for every matching property's tenants — including leases that already existed before the document was added, and any future tenant on that property from day one. Each document now has ▲/▼ arrows to reorder it in the list, saved immediately — this is the order tenants see them in. Click **Edit** to change a document's title, replace its file, or change which properties it's loaded to; **Delete** stops it showing up right away.

20g. Payments

The Stripe and PayPal configuration fields covered in Sections 8e and 8f live here, along with the **card surcharge fee** (Section 8g), **Pay Through an App** — including the QR code picture upload added in version 0.71.0 — (Section 8h), and, **new, "Let tenants use AutoPay and scheduled payments (Stripe only)"** (Section 8i) — off by default. Secret fields (Stripe Secret Key, Webhook Signing Secret, PayPal Client Secret) are masked after saving, showing only the last four characters — leaving a masked field untouched when saving other changes keeps the existing stored value.

20h. Renters Insurance

New section in version 0.75.0. Turn on a Renters Insurance card on every tenant's Overview, pointing them to a provider's quote page — Lemonade by default, since the plugin ships with Lemonade's details pre-filled, but any provider's own link works the same way:

1. Check **Show a Renters Insurance card on every tenant's Overview**. Left unchecked, no card shows and the rest of this screen has no effect.
2. Set the **Insurance company** name (defaults to "Lemonade") and the **Quote link** the card's button opens — must start with `https://`. Use your own Lemonade partner or referral link here once Lemonade sends it, so quotes started from your tenants are tracked back to you.
3. Write the **Message to tenants** shown under the card's heading.
4. Under **Your requirements (optional)**: check **Renters insurance is required by the lease** to add that line to the card, and optionally set a **Minimum personal liability coverage** amount (e.g. "$100,000") to add a second line stating it.
5. Still optional: an **Interested party** — the name tenants list as an "interested party" on their own policy so you're notified if it lapses or is cancelled — with a **name**, a **mailing address**, and an optional **email for proof of insurance**. Leave the name blank to leave this off the card entirely.
6. Click **Save**. A live **"What tenants see"** preview below the form always shows the card exactly as your current, saved settings will render it.

The card a tenant actually sees: a **"Get a quote from {company} ↗"** button in that provider's own brand color (Lemonade's pink, or a generic blue for anyone else) opens the quote link in a new tab; underneath, bullet points for "required by your lease" and the minimum liability amount appear only when those are set; a boxed "Add us as an 'interested party' on your policy" panel with a **Copy** button appears only when a party name or address is set; and, if an email was given, a line asking the tenant to send a copy of their policy's declarations page to it. A closing line always reminds the tenant they buy the policy directly from the provider — this plugin doesn't sell insurance or see any payment details.

> **Lemonade API quoting isn't available yet.** Once Lemonade approves an API request and sends the integration details, getting an actual quote inside the tenant portal — rather than just linking out — can be added on top of this. Until then, the card's button always sends the tenant to the quote link above.

20i. Rent Reporting

New section in version 0.76.0. Report rent payments directly to the credit bureaus yourself, as the "data furnisher" — no third-party reporting service, and off until you turn it on:

1. Check **Turn on rent reporting**.
2. Under **How it works for tenants**, choose one mode:
   - **Required by the lease** — tenants must acknowledge it in their portal; there's no tenant-facing opt-out. Only you can stop reporting someone (below).
   - **Optional** — tenants choose to opt in, and can opt back out themselves at any time.
3. Under **Credit bureaus**, check each one you report to — **Experian (RentBureau)**, **TransUnion**, and/or **Equifax** — and enter the **subscriber / furnisher number** each one issued you when you signed up to report. A bureau's subscriber field is disabled until that bureau is checked.
4. Under **Your company (shown to the bureaus as the furnisher)**, enter the **company name**, **phone**, and **mailing address** that identifies you to the bureaus on the monthly file.
5. Optionally set a **First month to report** — the monthly reporting file below refuses to build a file for any earlier month.
6. Under **Lease clause / what tenants acknowledge**, write (or use **Use the standard wording** for) the exact wording tenants see and acknowledge or opt into. **Copy for your lease (with the bureau names)** copies this same text, plus a line naming whichever bureaus are currently checked, so your actual paper/digital lease matches what tenants see on screen. Have a lawyer review it before using it. Changing this wording later means any tenant who already acknowledged is asked to acknowledge the new wording again before they're reported further.
7. Click **Save**. If reporting is on but no bureau is checked yet, a warning says so — tenants see nothing until at least one bureau is turned on.

Under **Leases and tenants**, every active lease is listed with its tenants, each tenant's current status (a colored chip — acknowledged, opted in, opted out, or stopped by staff), and:

- **Included / Left out** — a checkbox per lease. Only you can leave a lease out of reporting entirely; it's the one override tenants themselves can never trigger.
- **Record signed lease** — for a tenant who signed a *paper* lease that already contains the rent-reporting clause. This records them as reported (as "staff_acknowledged") without needing them to click anything in their own portal.
- **Stop reporting** — on any currently-reported tenant, with a confirmation reminding you that tenants can't do this themselves. **Restart** appears afterward to resume reporting them.
- **History** — opens every consent event ever recorded for that lease: when, which tenant, what happened (acknowledged / opted in / opted out / staff action), the IP address it came from, and the exact wording shown at that moment — your proof trail if a bureau or tenant ever disputes what was agreed to.

Under **Monthly reporting file**, pick a **Month** and optionally one specific **Bureau** (or leave it as "All switched-on bureaus"), then click **Download CSV**. Each row covers one reported tenant (repeated once per bureau when reporting to more than one): rent due and paid that month, date paid, days late, total past due as of the last day of the month, and an account status (**Current**, **30-59 days late**, **60-89 days late**, **90-119 days late**, **120+ days late**, or, for an ended lease, **Closed – paid in full** / **Closed – balance owed**). Rent only — fees aren't included. A note below the download names anyone who would have been in the file but isn't yet, because they haven't acknowledged or opted in.

> **Send the file the way each bureau tells you to.** This plugin builds the data; it doesn't have a live connection to any bureau. Once you know a bureau's exact required file layout, that format can be matched here — for now the CSV download gives you everything needed to build it by hand or hand off to whatever submission tool the bureau provides.

Under **Disputes**, click **+ Log a dispute** to record one a tenant or bureau raises against you: the lease, the tenant's name, the date you received it, which month it concerns, which bureau it came from (or "Directly from the tenant"), and what they say is wrong. Saving sets a **30-day answer-by date** automatically from the received date. An open dispute's remaining days count down in the list, turning amber inside a week and red once overdue; **Mark resolved** asks what you found or changed and keeps that note with the dispute, and a resolved dispute can be **Reopen**ed if needed. Fix the underlying payment record in the system so the next monthly file sends the corrected numbers.

> **This is a legal filing, not just a plugin feature.** Rent reporting to the credit bureaus is governed by the Fair Credit Reporting Act and each bureau's own furnisher agreement — have a lawyer review your lease wording and reporting practices before turning this on, and keep up with each bureau's dispute-response deadlines (the 30-day default here is a reasonable starting point, not a substitute for knowing your actual obligations).

20j. Emails & Auto Late Fees

Two parts: the trigger settings for the automated emails, and the templates themselves.

Setting	Controls
Rent-due reminder (days before)	How many days before the due date the Rent Reminders email goes out. Default 3.
New: Start late-rent notices (days after due)	How many days after the due date the sweep starts treating a lease as needing late-rent attention; once started, a lease that still owes gets a notice each day until it's caught up. Also editable from Quick Setting Overview (Section 5h).
Lease Termination auto-send enabled	Master on/off switch for the Lease Termination notice auto-send (Section 8l). Off by default.
Auto-termination amount threshold	Overdue dollar total that triggers the notice, per lease. 0 disables this trigger.
Auto-termination count threshold	Number of unpaid overdue payments that triggers the notice, per lease. 0 disables this trigger.
Work order staff	Where new-work-order emails are sent.

notification email

Below that, **Email Templates** gives full control over the subject and HTML body of eight emails, each edited on its own tab:

Template	Sent When
Rent Reminders	Automated, the N days before due set above. Per-lease toggle (Section 7g).
Late Payments	Automated, when an auto late fee is added (Section 8l). Per-lease toggle.
Failed Payments	Automated, the moment a payment that looked successful fails to settle (Section 8l). Per-lease toggle.
Lease Terminations	Automated, per the thresholds above (Section 8l). Per-lease toggle.
New: Payment Made	Automated, when a payment is recorded on the tenant's account. Off by default; per-lease toggle, individually or in bulk (Quick Setting Overview, Section 5h).
New: Bank Payment Approved	Automated, when a processing bank (ACH) payment clears. Off by default; per-lease toggle.
New: Payment Changed	Automated, when an existing charge's amount or due date is edited. Off by default; per-lease toggle.
New: New Charge Added	Manual only — sent when staff check "Email the tenant about this new charge" while adding a payment (Section 8d). Editable here, but has no per-lease toggle and sends even while automated emails are paused.

Click any **Insert** tag button to drop in a merge tag at the cursor; tags fall into four groups:

Group	Tags
Company	Company Name, Company Address, Company Phone, Company Email, Company Logo — resolved from the lease's property's Owning Company (Section 5c), or your site default if none is set.
Tenant / Lease	Tenant Name, Property Address, Unit, Amount Due, Due Date, Days Late, Account Login Link.
New: Payments	What It Was For, Amount Paid, How It Was Paid, Date Paid, Balance Left on That Charge, Processing Note (bank payments), Old/New Amount and Old/New Due Date (for Payment Changed), Charge Amount, Charge Due Date, and Monthly Schedule Note (for New Charge Added) — thirteen tags feeding the four new templates above.
Termination Notice	Property City/State/Zip, Lease Start Date, Notice Date, Vacate Date, Next Due Date, Monthly Rent — used by the formal Pennsylvania-statute termination letter wording (Section 8l).

Each template can also have a **copy-to** staff email address turned on, so a staff member automatically gets a copy of whichever one(s) they want to monitor.

> **A tag with nothing to show just disappears, rather than printing blank.** For example, a unit with no label won't leave an empty parenthetical in the sentence it was part of — the surrounding wording around a conditional tag is written to only appear when that tag actually has a value.

20k. Work Orders

Edit the Nature of Issue list (Section 12c): rename an entry, reorder with the up/down arrows, remove one, or add a new one. **Other** is locked in place as a required catch-all and can't be removed or renamed away.

20l. Apartment Checklist

Edit the Apartment Inspection Checklist template (Section 10d): the opening statement, the disclaimer text, the standard item list, and the maximum number of extra items a tenant may add.

20m. Lease Amendments

Edit the four Lease Amendment templates (Section 11d): their blank fields and default wording, using the available system tags.

20n. Reports

Consolidates all report-related configuration in one place:

- **Late Payments Report** — how many months back to show in the comparison column.
- **Reports List Show & Order** — hide any built-in report you don't use, and drag to reorder the list everyone sees in the Reports tab. **New:** click a report's **Icon box** to give it a title icon from the built-in icon library (the same one Website Listings uses, Section 6e) or an uploaded image — it shows both in this list and on that report's own heading on the Reports page.
- **Property Profitability** — map tax categories into your own profitability groups.
- **Annual Tax Summary** — a checkbox to split expenses assigned to a company equally across that company's properties. **New:** this same split setting also drives the Annual Tax Report — Expense Breakdown (Section 19f), and all three affected reports (Tax Summary, Property Profitability, Expense Breakdown) show a short note under their title stating how common expenses are currently being handled.
- **Investments Report** — how many years back to show in the comparison column (Section 15d).
- **Custom Reports** — the list of saved custom reports and the **+ New Custom Report** builder (Section 19g).
- **Tax Category Manager** — hide or rename tax categories (Section 9c).

20o. Appearance

Set the app title shown in the browser tab and header (default "Property Manager"), a primary accent color (hex), and an optional logo URL. Applies to the top bar, the loading screen, the login screen, website listing cards (Section 6d), and login cards pasted elsewhere on the website.

> **The default accent color changed.** Newer installs default to blue (`#0A6CB4`) instead of the earlier teal, as part of a general restyle to feel more like a branded website than a database screen (Section 4). An install still on the old teal default is switched automatically on update; a color you picked yourself here is always kept as-is.

New: Page Tabs — Order. Reorder the top navigation tabs (Dashboard, Properties, Payments, and so on) with ▲/▼ arrows next to each one — no drag-and-drop needed. **Save Tab Order** stores it; **Back to original order** clears a custom order and goes back to the built-in one. Whichever tab ends up first in the saved order becomes the landing page right after sign-in, for whichever tabs that particular login's permissions allow it to see.

20p. Import/Export

A full set of CSV importers, meant to be run once while setting the plugin up (ideally with the email-pause switch, Section 20a, turned on first). The screen recommends running them in this order: **Properties → Tenants & Leases → Keys → Expenses → Invested → General Property Info**, then any historical payment records last.

Importer	Matches Existing Rows By
Properties	Street address.
Tenants & Leases	One row per person; roommates sharing a unit/lease-start are grouped automatically.
Keys	Key ID; a street address with no matching unit becomes a building key, and one matching a company name saves against that company (Section 17c).
Expenses	Delegates to the Expenses importer (Section 9e).
Invested — Loans & Personal Funds	Lender/investor name + reference + start date + property.
Invested — Repayments	Matching investment by lender name/reference; exact-duplicate rows are skipped.
General Property Info	Street address; includes the one-click **"Fill from my spreadsheets"** seed button (Section 18c).

> **New: adding one tenant without a spreadsheet.** A **+ Add Tenant Manually** button under the Tenants & Leases importer opens a form for a single person — property, unit, the tenant's own contact details, and the lease's own start/end/status/rent/deposit/tenant-names — and sends it through this exact same importer and validation rules as a one-row CSV, including the same same-start-date merge-vs-new-lease behavior noted on the form. An optional **Copy of the signed lease** upload (PDF, Word, a scan, or a photo, up to 15MB, with the same Media Library folder picker as Property Documents, and an editable "Name shown to the tenant" that defaults to "Signed lease") attaches straight to the new lease's Documents. **Save & Add Another** keeps the same property/unit/lease selected so a second roommate can be added to the same lease right after the first, with a running list of what's been added so far shown above the form.

A separate **Payment History From a Previous System** section imports historical records from an old system's exports:

- **Received Payments** — columns: tenant name, street address, unit number, payer-debited-on date, payee-paid-on date, amount, status, transaction number, charge type, notes.
- **Late/Unpaid Payments** — columns: tenant last name(s), street address, unit number, due date, amount, payment total.

Every importer shares the same behavior: flexible date and currency parsing, matching by a natural key so re-running an import doesn't create duplicates, and a "skip the bad row, report why" approach rather than failing an entire file over one bad line.

20q. Legacy WP Users

Kept only for granting a real WordPress account to a colleague who needs full wp-admin Administrator access — tenants and day-to-day staff logins no longer use WordPress accounts at all (Sections 1b, 20b, 20c cover their actual login systems instead). Search and manage WordPress accounts with Property Manager access: promote a user to Staff (the `pm_staff` role) or Tenant (`pm_tenant` , kept only for pre-migration accounts, Section 13b), send a setup-link invite, or remove access. A WordPress Administrator can't be demoted or deleted from here, and you can't delete your own account.

21. Permissions Reference

These twelve capabilities apply to Staff Login accounts (Section 20b); a WordPress Administrator or Shop Manager always has all of them automatically.

Permission	Lets Staff…	Admin	Manager	Employee
pm_access	Sign in to the dashboard at all.	✓	✓	✓
pm_manage_properties	Add/edit/archive properties, units; manage Website Listings (Section 6), Property Info (Section 18), and Keys (Section 17).	✓	✓	—
pm_manage_leases	Create/edit leases, manage lease documents, amendments (Section 11).	✓	✓	—
pm_manage_payments	Create/edit payment line items.	✓	✓	—
pm_mark_manual_payment	Use Record Payment (cash/check/other, Section 8b).	✓	✓	—
pm_manage_maintenance	Manage work orders, change their status.	✓	✓	✓
pm_manage_tenants	Add/remove/restore tenants, toggle onboarding status, send invites, and use Email Tenants (Section 14).	✓	✓	—
pm_view_reports	View, send, and schedule reports; use the Calculator (Section 16).	✓	✓	—
pm_manage_settings	Change any Settings tab, including Payment Settings.	✓	—	—
pm_view_as_tenant	Use View as Tenant (Section 13e).	✓	✓	—
pm_manage_expenses	Add, edit, and import/export Expenses (Section 9).	✓	✓	—
pm_manage_investments	Add, edit, and record repayments under Invested (Section 15).	✓	—	—
pm_view_sensitive_info	See Purchase Price and the Outstanding Mortgages & Liens panel under Property Info (Section 18a) — hidden otherwise.	✓	—	—

Manager is not just one permission short of Admin. Manager lacks Manage Settings, and also lacks Manage Investments and the Property Info financial-details permission — unlike every other financial-leaning permission (Manage Payments, Manage Expenses), which Manager still gets by default. Every individual toggle can still be overridden per staff account regardless of which preset you start from, and a staff account can be narrowed further to specific report types or specific Settings tabs (Section 20b).

22. Troubleshooting & FAQ

"My Access URL shows a 404." Re-save Permalinks (Settings → Permalinks → Save Changes) after installing or changing the Access URL slug — this flushes WordPress's rewrite rules, which is the most common cause. If you need in immediately, use the wp-admin fallback dashboard (Section 2d) in the meantime.

"The Access URL shows a blank or broken page instead of the login card." Check Settings → General — "Show the login screen at the Access URL" may be turned off, sending signed-out visitors elsewhere (Section 3f). Add `?pm_login=1` to the Access URL to see the login card regardless of that setting.

"A login card I pasted on my website doesn't show up." Make sure both lines were pasted together — the placeholder `div` and the `script` tag — into an HTML block (in Elementor, the "HTML" widget), not a regular text block that might strip the tags. The shortcode version (`[sl_pm_login]`) is a safer choice on a page builder that filters raw HTML.

"Staff or Tenant login always fails, even with the right password." Confirm the frontend-access-snippet is Active in the Code Snippets plugin. If the snippet isn't running, the login form posts nowhere useful. A reCAPTCHA plugin protecting the WordPress login form is not a factor either way (Section 2c) — neither login touches that form.

"A tenant's login still goes through their old WordPress account instead of the new system." They haven't been re-invited since the plugin-owned tenant login shipped — click Invite/Re-invite on their row under My Tenants or Settings → Tenant Logins (Section 13b) to set up their plugin-owned login. Their old WordPress login keeps working as a fallback in the meantime, so nothing is broken, just not yet migrated.

"Nobody is getting any emails at all — rent reminders, late notices, nothing." Check whether Settings → General → "Turn off ALL email notifications" is checked (Section 20a) — this is the most common cause after a fresh install or data import, since it's meant to be turned on deliberately during setup and then turned back off before going live. A tenant's own lease might also have that specific email turned off individually (Section 7g) even with the master switch off.

"A tenant stopped getting the Lease Termination notice but still gets late notices." Check that lease's own per-lease email toggles (Section 7g) — Lease Terminations may have been turned off individually for that lease (for example, because the tenant is on a manual payment plan) while the other three templates stay on.

"A charge still shows as not fully paid, but I recorded a payment on it." The payment was probably a partial one — check the charge's payment history (Section 8b) for the running total; it only flips to **paid** once every recorded parcel together covers the full amount due. If a parcel was recorded with the wrong amount, use **Remove** on that parcel and record it again correctly.

"A tenant was charged more than the rent when paying by card." That's expected if a card surcharge fee is turned on (Section 8g) — the fee is added on top and shown to the tenant before they pay, and booked as its own fee line afterward. Bank account (ACH) payments through Stripe never carry it; point the tenant at that option if they'd rather avoid the fee.

"A tenant says they paid by Venmo/Zelle/Cash App but it's not showing as paid." Those are listed under "Other Ways to Pay" (Section 8h) and are never recorded automatically — the plugin only shows the tenant where to send money and asks them to let you know. Record the payment yourself from the Payments tab (Section 8b) once you've confirmed it arrived.

"A manager-level staff account can't see Purchase Price or the mortgages panel." That's expected — the Property Info financial-details permission (Section 21) is Admin-only by default, unlike most other financial-leaning permissions. Turn it on individually for that staff account under Settings → Staff Logins (Section 20b) if they need it.

"A removed tenant's old payment history disappeared from the unit." It hasn't — removing a tenant is a soft removal (Section 13d) that hides them from current-tenant views but keeps their record and payment history intact. Use Restore from Settings → Tenant Logins, or check the property's full tenant history, to see them again.

"A submitted inspection checklist or signed amendment isn't showing up anywhere." Check the Dashboard's Needs Finalizing card (Section 4a) — both land there until a staff member finalizes (or, for a checklist, returns) them. If it's truly missing, confirm you're looking at the right lease; each lease has at most one active checklist.

"I edited the checklist or amendment template, but an existing record didn't change." That's expected, not a bug — both are snapshotted onto the record the moment it's created (Sections 10a, 11b), specifically so a later template edit can never retroactively change something already filled out or signed.

"A unit's website listing isn't showing on the site." Check, in order: the unit's **On website** switch (Section 6c) must be on; the shortcode's `available="1"` option, if used, hides any Not Available unit; and, if the page uses `property="ID"` or `limit="N"`, the unit may simply be outside that

filter. A unit never listed at all shows "Create Listing" rather than these switches.

"An Email Tenants send shows fewer 'sent' than the number I selected." Check the result's skip reasons (shown under the send confirmation) — a tenant with no valid email on file, one who's unsubscribed from your newsletters (newsletter sends only), or a second tenant sharing the same email address as one already counted are all skipped automatically and explained there.

"A custom report isn't showing the data I expect." Double-check the data source you picked (Section 19g) actually matches what you're trying to report on — for example, a report built on the Leases source won't include payment amounts, since those live under the separate Payments/Charges and Money Received sources.

"A tenant invite says it failed to send." See Section 13b — check whether the reason given is a missing email on file or a mail-delivery failure, and install an SMTP plugin if it's the latter.

"I'm not getting the 6-digit verification code email." Check spam, and confirm the account has a valid email on file (Settings → Staff Logins or Tenant Logins). The code expires after 10 minutes, so request a fresh login attempt rather than reusing an old code. If codes never arrive at all, the issue is usually the same outbound-mail problem as a failed invite (Section 13b) — an SMTP plugin typically fixes it. This email is unaffected by the master email-pause switch (Section 8k).

"Card or PayPal payment isn't showing as an option for a tenant." Confirm the corresponding gateway is both enabled and has its required keys filled in under Settings → Payments (Section 20g) — a gateway with missing keys stays hidden from tenants even if its "enabled" toggle is on. Also confirm that lease doesn't have online payments disabled (Section 7f), which hides Pay Now entirely regardless of gateway setup.

"A tenant doesn't see an AutoPay tab at all." Check that "Let tenants use AutoPay and scheduled payments" is turned on under Settings → Payments (Section 20g) — it's off by default on every install. Also confirm that lease doesn't have online payments disabled (Section 7f), which hides AutoPay the same way it hides Pay Now.

"AutoPay didn't charge a tenant on the day I expected." In "day of the month" mode, AutoPay only charges on the chosen day itself, picking up anything due within the next 10 days at that point — a charge due further out than that waits for the day to come around again next month. In "on the due date" mode, check that the charge's own due date is what you expect; a charge already overdue when AutoPay was turned on is caught the first night afterward, not retroactively. Also check whether the lease's bank payment is still processing (Section 8a) — AutoPay skips a charge that already has one in flight.

"A Stripe payment succeeded but the payment still shows unpaid here." Check the Stripe webhook configuration (Section 8e) — the webhook, not the tenant's browser redirect, is what actually confirms the payment. Confirm the Webhook Signing Secret matches what's configured on the Stripe side for that endpoint, and try "Test my Stripe setup" for a quick checklist.

"A tenant's bank payment was marked paid, then a Failed Payment email went out." That's expected for a bounced ACH debit — Stripe Checkout can report success before the bank transfer actually clears days later, and the `checkout.session.async_payment_failed` webhook event is what catches it after the fact (Section 8l). Confirm that event is included on your configured webhook.

"Where did the SL Waivers status option go?" It only appears if the SL Waivers plugin is active on the same site. If it's not installed or not active, the lease documents area simply shows "SL Waivers isn't active on this site."

"Attached work-order photos disappeared." This is the known image-preview limitation (Section 12a) — attachments aren't yet uploaded to permanent storage, so don't rely on them persisting. This is different from Expenses' receipt images (Section 9d), which do upload permanently.

"An expense I imported wasn't assigned to the right property/company." Assigned To has to match an existing property's street address or company's name exactly, case aside. A near-miss is still imported (not dropped) but left unassigned and listed as a warning after the import finishes — fix the mismatch and re-import just that row, or reassign it directly from the Expenses list.

"Scrolling the page changed a number I had clicked into." This was a known issue — scrolling the page while the mouse pointer sat over a focused number field (a rent amount, a late fee, and so on) used to silently change that number instead of scrolling. It's fixed: the field now loses focus the moment you scroll, so the page scrolls normally and the number stays put. If you're still seeing it, you're on a build older than 0.58.0.

23. Quick Reference

Default Access URL	`yoursite.com/property-manager/`
wp-admin fallback	Property Manager / Property Manager → Settings, for a WordPress Administrator
Default seeded Staff Login	`admin` / `admin` — change immediately
Required companion plugin	Code Snippets (delivers the frontend page)
Staff & Tenant logins	Both plugin-owned (not WordPress accounts); WordPress accounts are a fallback for Administrators only
Login cards	One shared card at the Access URL, and pasteable/shortcode cards anywhere on the website (Section 3f)
Website listings	`[sl_pm_listings]` (full) / `[sl_pm_listings limit="6"]` (home page) — 4 card styles, 3 layouts (Section 6)
Payment processors	Stripe (card + US bank/ACH), PayPal (balance + Venmo) — both support partial amounts and an optional card surcharge fee
Manual payment apps	Venmo/Cash App/Zelle/etc. under "Pay Through an App" — shown to tenants, recorded by staff afterward (Section 8h)
Automated email templates	Rent Reminders, Late Payments, Failed Payments, Lease Terminations (formal PA-statute wording), plus Payment Made/Bank Payment Approved/Payment Changed (off by default) — all editable under Settings → Emails & Auto Late Fees, plus the manual-only New Charge Added template
Master email pause	Settings → General — blocks all automated notices; never blocks resets, codes, manual invites/sends, "Email the tenant about this new charge," or AutoPay
Per-lease email toggles	On each lease, or in bulk from Quick Setting Overview — turns individual templates on/off for just that lease (Section 7g)
Email Tenants	One-off messages to a chosen set of tenants, sent individually or (with SL Email Marketing) as a tracked newsletter (Section 14)
Report email cron	WordPress hourly cron — hour-accurate, not minute-accurate
Daily sweep	Runs AutoPay/scheduled payments first, then marks overdue, rolls month-to-month rent forward, sends reminders/late fees/termination notices (~6:00am server time)
AutoPay and scheduled payments	Stripe only; off plugin-wide by default (Settings → Payments); one tenant per lease at a time; staff can turn off/cancel, never on (Section 8i)
Report types	17 built-in + unlimited custom reports from 8 data sources; every one can download/send/schedule as Excel and/or CSV, and is sortable with "read more" cells (Sections 19b, 19c)
Nature of Issue (Work Orders)	Staff-editable list; default: Plumbing, Electrical, Heating/Cooling, Appliance, Pest Control, Minor Damage/Repair, Lockout, Safety/Urgent, Other
Payment statuses	scheduled → pending/overdue → paid (once all recorded parcels cover the full amount), or processing for online payments settling (a processing bank payment is never marked late, Section 8l)
Lease statuses	pending, active, ended, archived
Quick Setting Overview	Properties tab toolbar — month-to-month, auto late fee, and per-lease email toggles for every current lease in one table (Section 5h)
Payment attachments	One receipt/bill (PDF or picture, ≤10MB) per payment line item; hidden from tenants unless "Let the tenant see this file" is checked (Section 8b)
Onboarding tracker columns	Invited, Account Created, Payment Method Added, Payment Method Verified, AutoPay Ready, Emergency Contact Added
Staff & Tenant login passwords	Stored in plain text; optional minimum-length/character rules under Settings → Login Security
Expense CSV columns	Date, Amount Paid, Tax Paid, Vendor, Description, Tax Category, Payment Type, Check #, Assigned Type, Assigned To, Receipt URL
Key assignment	A unit (specific), a property with no unit (building key), or a Property Ownership company (office/equipment key) — Section 17c
Permissions needing special attention	pm_manage_investments and pm_view_sensitive_info — Admin only by default, unlike most other financial-leaning permissions
Checklists & Amendments	Snapshot their template wording at creation — a later template edit never changes an already-created record
Default accent color	Blue `#0A6CB4` (newer installs); an older install on the previous teal default is switched automatically

24. Version History

What's changed in each release of this plugin, in plain language — for reference and troubleshooting.

Version	Date	What Changed
0.76.1	October 2026	Fixed: the Tax Category manager (Section 9c) no longer needs sideways scrolling to reach Rename / Hide on a long category name — columns are now fixed-width and the name wraps instead.
0.76.0	October 2026	Added: Settings → Rent Reporting (Section 20i) — report rent payments to Experian (RentBureau), TransUnion and/or Equifax yourself, with your subscriber numbers for each. Required mode has tenants acknowledge it in their portal (recorded with date, time, IP and exact wording), with no tenant opt-out — only staff can stop reporting a tenant or leave a whole lease out; Optional mode lets tenants opt in and out themselves. Produces a monthly CSV (one row per reported tenant per bureau: rent due/paid, days late, total past due, account status) and flags who isn't reported yet. Includes a dispute log with a 30-day answer-by date and a per-lease consent history.
0.75.0	October 2026	Added: Settings → Renters Insurance (Section 20h) — turn on a Renters Insurance card on every tenant's Overview with a "Get a quote" button to your provider (Lemonade by default), your own message, whether the lease requires it, a minimum liability amount, and an "interested party" name/address/email tenants can copy onto their policy. Lemonade API quoting can be added once API access is granted.
0.74.0	October 2026	Added: the custom "Money Received" report's Received By column can now be scoped to specific people — tick who to include, or leave everyone unticked to include all of them; a "(no name)" entry covers payments with no Received By recorded (Section 19g).
0.73.0	October 2026	Added: a name added under Mark Paid's Received By (or a new Payment Method) is now saved right away, so it's available next time even if the window closes without recording a payment; an "Edit names..." link lets you hide someone who no longer collects, rename a misspelled name (optionally fixing past payments too), and see how many payments each name is on (Section 8b). Changed: a rent charge made from the lease dates or month-to-month now says which month it's for, e.g. "Rent - November 2026" (Section 8d).
0.72.0	October 2026	Changed: "Other ways to pay" (Tenants → Payments and inside Pay Now) now shows each payment app as its own colored button; clicking one opens a "Pay with {app}" window with the amount to send, the QR code, the username with a Copy button, an "Open {app}" button, the note, and the "contact us after you pay" notice (Section 8h).
0.71.1	October 2026	Added: Tenant View (the staff read-only preview of a tenant's account, Section 13e) now also shows "Other ways to pay" and the Pay Now button, exactly as the tenant sees them; Pay Now opens the same preview window, but nothing can actually be paid from Tenant View.
0.71.0	October 2026	Added: each Pay Through an App entry (Settings → Payments, Section 8h) can now have a QR code picture uploaded — the one Venmo, Cash App, PayPal, or a bank's Zelle shows under "My code." Tenants see it under "Other ways to pay" and can tap it to open it full size.
0.70.2	October 2026	Added: clicking a photo on a listing's details page now opens a full viewer with previous/next arrows (also arrow keys and swiping on phones), a "3 / 15" counter, and that photo's caption — it goes through every photo of the listing, not just the first nine shown in the grid; a "+N more" label marks the last grid tile when there are more (Section 6b).
0.70.1	October 2026	Changed: a Not Available card's photo is no longer greyed out — the Occupied banner is the only visual cue now (Section 6c). Added: any listing change now clears the site's page cache (LiteSpeed, WP Rocket, W3TC, WP Super Cache) right away instead of waiting for it to expire. Added: the Media step shows what photo size works best, with a red border on any photo under 900px wide or taller than wide (Section 6b).
0.70.0	October 2026	Added: Settings → Website Listings → Not Available cards — show a banner across the photo (your own wording, "Occupied" by default) when a unit's Available switch is off (Section 6e).
0.69.0	October 2026	Compatibility: now works with SL Waivers & Leases 1.36.2+, which stores signature images encrypted — a lease signature (Section 7) keeps displaying correctly either way, with no change needed if you're on an older SL Waivers version.
0.68.0	October 2026	Added: a full search/filter/sort panel for Expenses (Section 9f) — quick and custom date ranges, Property/Company, Tax Category, Paid By, has/no receipt, an amount range, and five sort orders, pinned under the tabs as you scroll, with search now also matching check #, amount, and receipt file name. Export CSV now exports exactly what's shown under your search/filters. Filters are remembered for the browser tab until it's closed.
0.67.0	October 2026	Security: Expense receipts (Section 9d) and payment receipt/bill attachments (Section 8b) are no longer saved in the public Media Library — they're encrypted in private storage and open only through a signed link good for 12 hours; files already in the Media Library were moved automatically. Uploads are now checked to really be a PDF or picture (JPG/PNG/WebP/GIF/HEIC) from their contents, capped at 10 MB. Security: Staff and Tenant login passwords are now stored scrambled instead of in plain text, converted automatically on update (Section 3).
0.66.0	October 2026	Fixed: a cached copy of the Access URL page with an expired security code could show "Cookie check failed" when signing in from a browser without a WordPress login, on hosts/caches (like LiteSpeed Cache) that saved the page. The page is no longer cached, so this self-corrects (Section 3).
0.65.0	October 2026	Changed: Log Out (staff/landlord and tenant) now sends the signed-out visitor to your website — the address in Settings → General's "After Log Out, go to" box, or your site's home page if left blank — instead of just reloading back to the plugin's own login screen. That box is now always shown in Settings → General, not only when the Access URL's login screen is turned off (Section 20a).
0.64.0	October 2026	This entry covers every change between the 0.41.0 build previously documented and this one. Added: AutoPay and scheduled payments (Section 8i) — a tenant can save a card or bank account with Stripe and have rent (and optionally fees) charged automatically each month, on their due date or a chosen day, with configurable failure handling and a required authorization checkbox; staff turn the feature on plugin-wide (Settings → Payments) but can never turn it on for a tenant, only off; a separate one-time "Schedule a single payment" is included; runs at the start of the nightly sweep, before late fees, and reconciles anything stuck "processing" directly against Stripe. Added: Quick Setting Overview (Section 5h) — a single table of every current lease's month-to-month, auto-late-fee, and per-lease email settings, editable in bulk or one lease at a time. Added: three new opt-in tenant emails (Payment Made, Bank Payment Approved, Payment Changed) and a manual, non-toggleable "New Charge Added" email sent from a new "Email the tenant about this new charge" checkbox on Add Payment (Sections 7g, 8d, 8k, 20j). Added: a late-fee/overdue hold while a bank (ACH) payment is still processing, shown right on the charge (Sections 8a, 8l). Added: payment attachments — a receipt or bill can be attached to a single payment line item, optionally visible to the tenant (Section 8b). Added: Excel (.xlsx) as a download/Send Now/Schedule Email format alongside CSV, remembered per computer (Section 19c). Added: a sticky, self-scrolling report

		table with pinned header/first column(s) (Section 19b). Added: the Annual Tax Report — Expense Breakdown, a per-property/per-category report with its own common-expense split checkbox (Section 19f); the Annual Tax Summary and Property Profitability reports now show a short note explaining how that split is being applied. Added: a Reports List icon picker (Section 20n), and Settings → Appearance → Page Tabs — Order to reorder the top navigation and set the post-login landing tab (Section 20o). Added: "+ Add Tenant Manually," with an optional signed-lease upload, under Settings → Import/Export (Section 20p). Added: Property Documents reordering and an Edit action, plus a Media Library folder picker on upload (Section 20f). Added: phone number fields on New Lease and on adding a co-tenant (Section 7a). Added: unit cards show bathrooms and up to three lines of notes, with a new Edit link (Section 5d); property cards now show a future lease's start date, mark a holdover tenant as still active, drop a removed tenant immediately, and turn a 4+-tenant list into a scrollable sub-list (Section 5a). Changed: the month-to-month auto-rent rule simplified to "add next month's rent the day after the current month's is due," no longer back-charging missed months and no longer drifting on a 29th–31st due date (Section 8d). Fixed: large numbers on summary/stat cards now shrink to fit instead of overflowing (Section 4a); scrolling the page no longer changes the value of a number field the pointer happens to be over.
0.41.0	October 2026	This entry covers every change between the 0.30.0 build previously documented and this one. Added: a full public Website Listings system (Section 6) — a six-step listing editor (basics, amenities, media, description, contact, review), Available and On Website switches, 4 card styles and 3 layouts (grid/carousel/marquee) with their own settings, a Featured badge, 24 built-in icons plus uploaded ones, copy-paste shortcodes for a listings page and a home page, and a rewritten All Listings report that reads the underlying data in plain language. Added: Email Tenants (Section 14) — compose a message to a chosen set of tenants by property/lease/person, send it individually with merge tags or as a tracked newsletter campaign through SL Email Marketing when active, with Preview, Send Test, and a Sent log. Added: one shared login card used both at the Access URL and pasteable anywhere on the website (copy-paste HTML or a `[sl_pm_login]` shortcode), with Settings → General options to show/hide the Access URL's own login screen, redirect signed-out visitors, hide "New Here?", set signup links, and set the Sign In button color (Section 3f). Added: an optional credit card surcharge fee (percent and/or flat, Stripe and/or PayPal, never on ACH) and a "Pay Through an App" panel for Venmo/Cash App/Zelle/etc. that tenants pay manually and staff record afterward (Sections 8g, 8h). Added: a "Test my Stripe setup" checklist button under Settings → Payments. Added: "Start from a copy of" on Add Property and Add Unit, plus Duplicate links on property and unit cards, with control over whether units or a website listing come along with the copy (Section 5f). Added: building keys (a property with no specific unit) and company keys (assigned to a Property Ownership company instead of a property), plus A-Z/Z-A sorting and an Unassigned section on the Keys tab (Section 17). Added: every report column, and the Dashboard's click-through detail lists, can now be sorted by clicking the heading, and any long cell can be opened to read in full (Section 19b). Restyled: the dashboard look now matches a friendlier branded website (Montserrat, navy headings, blue actions with a yellow accent, soft cards) instead of a plain database feel; no screen or feature moved, and the default accent color changed to blue for new/reset installs (Section 20o). Fixed: the `properties` database table could fail to be created on a fresh install due to a stray semicolon in a column comment, up to version 0.32.0.
0.30.0	October 2026	A major expansion — roughly ten new features and screens on top of the 0.16.3 build. Added: partial/installment payments (Section 8b) — a charge can now be paid off in several parcels over time, each with its own method, payer, and staff-only receiver/notes, with any parcel individually removable, and tenants can pay a partial amount online too. Added: a master "Turn off ALL email notifications" switch for setup periods, plus per-lease email toggles and optional staff-copy on each automated template (Sections 7g, 8k, 20a, 20j). Added: the Lease Termination notice is a formal Pennsylvania Landlord Tenant Act of 1951 legal-notice format, not generic wording — review it against your own jurisdiction before relying on it (Section 8l). Added: Apartment Inspection Checklist (Section 10) and Lease Amendments (Section 11) — both tenant-signable, staff-finalized, and both snapshot their template wording at creation so later template edits never retroactively change a signed record; both feed the Dashboard's "Needs Finalizing" card (Section 4a). Added: Invested (Section 15) — tracks bank loans and personal funds put into the business, with a repayments ledger and an Investments by Lender report. Added: Calculator (Section 16) — a Loan Calculator and Cap Rate Calculator with saved/downloadable/printable results. Added: Keys (Section 17) — a physical key register. Added: Property Info (Section 18) — detailed per-property building/mortgage/roof/plumbing/HVAC data, a one-click seed-data import from existing spreadsheets, and three reports (Real Estate Schedule, Rent by Unit, Property General Info); Purchase Price and Outstanding Mortgages & Liens are hidden from staff without the Property Info financial-details permission, which is Admin-only by default (Section 21). Added: Property Profitability and Annual Tax Summary reports, plus a full custom report builder from 8 data sources, and the ability to hide/reorder the built-in report list (Sections 19a, 19g, 20n). Added: multi-page receipt images on Expenses, plus tax-category hide/rename management (Sections 9c, 9d). Added: End Lease / Restart Lease actions and a per-lease "disable online payments (collections)" toggle (Sections 7e, 7f). Added: a large set of CSV importers under a new Import/Export settings tab (Section 20p). Added: soft-delete/restore for tenants, and a property's full tenant history (Section 13d). Added: click-through detail windows on every Dashboard summary card (Section 4b). Added: shared-email tenant logins, so roommates with the same email on file can still each keep their own password (Section 3b). Added: signed, time-limited links for SL Waivers printable documents and signatures (Section 7c). Fixed: nothing changed about the work-order image-attachment preview-only limitation (Section 12a) — it remains a known, unfixed limitation, not newly introduced.
0.16.3	October 2026	This update covers every change between the 0.9.2 build first documented and this one — the plugin's own changelog wasn't kept current across that range, so this entry is based on a full comparison of the actual code. Major: tenants now log in the same plugin-owned way Staff Logins always have (Settings → Tenant Logins) instead of a WordPress account — existing tenants keep working via their old WordPress login until re-invited once. Added: a wp-admin fallback that renders the full dashboard, including Settings, from a WordPress Administrator's own session, independent of the Access URL. Added: Login Security — configurable password requirements and an optional emailed 6-digit verification code with "remember this device," for both Staff and Tenant logins. Added: Expenses — landlord receipts/bills assigned to a property or a Property Ownership company, with Vendor/Tax Category/Payment Type picklists, receipt image upload (with SL Media Folders filing), and CSV import/export. Added: Property Ownership — a reusable list of LLCs/companies properties are held under, used to brand that property's automated emails. Added: Property Documents — documents that apply automatically to every current and future tenant on one or all properties. Added: four fully editable HTML email templates with merge tags (Rent Reminders, Late Payments, Failed Payments, Lease Terminations) replacing the old plain-text notices, plus a new Failed Payments email for a bank payment that fails after looking successful. Added: a Copy Code Snippet card in Settings → General so the Frontend Access snippet no longer needs a separate reference document. Added: tenants can edit their own contact info and request a password-change email from their own account's Contact Info tab. Added: the Properties list now shows each property's current tenants directly on its card. Added: a lease can get a date-range of recurring monthly charges, or ongoing month-to-month auto-renewing rent, from its Payments tab. Added: a new Manage Expenses staff permission. The "Users (WordPress Accounts)" settings tab is now "Legacy WP Users," kept only for granting full wp-admin Administrator access.
0.9.2	September 2026	First fully documented release. The application build carries three internal version markers that don't fully agree with each other — the plugin header reads 0.8.0, the database-schema version constant reads 0.9.0, and 0.9.2 is the version supplied with this build. 0.9.2 is used on this manual's cover as the version Pete supplied for documentation. Feature-wise, this build already includes the full tenant-facing frontend, Stripe and PayPal payment processing, the SL Waivers lease-document bridge, Staff Logins with granular permissions, and View as Tenant — all of which the plugin's own README describes as "not yet built," so treat the README as out of date rather than this manual.