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QuickStart Guide  
DIY Tools for Managing  
Tenancies

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# **1. Overview of Each Tool**

# 1. Overview of Each Tool

	Spreadsheet	Calendar	Notebook	Bank App
Beginning of Tenancy	<ul style="list-style-type: none"><li>• Create a list of your portfolio assets</li><li>• Create a list of your tenants</li><li>• Add the important terms of your lease agreement</li></ul>	<ul style="list-style-type: none"><li>• Create a list of tenancy events to be reminded of</li><li>• Set the reminders on your calendar</li></ul>	<ul style="list-style-type: none"><li>• Take notes on any communications/ issues to remember/ tackle</li></ul>	<ul style="list-style-type: none"><li>• Ask tenant to set up a monthly standing order with the rental payments</li><li>• Ensure you have access to your mobile banking app</li></ul>
Throughout Tenancy	<ul style="list-style-type: none"><li>• Update list of tenants</li><li>• Add new lease agreement terms</li><li>• Update the cashflow section with completed or pending payments</li><li>• Check dashboard to see portfolio performance</li></ul>	<ul style="list-style-type: none"><li>• Act quickly and accordingly when reminders are received</li></ul>	<ul style="list-style-type: none"><li>• Take notes of anything that is important to remember during the tenancy</li></ul>	<ul style="list-style-type: none"><li>• Check payments made on a monthly &amp; annual basis</li></ul>

## **2. Use Cases, Links, and Steps**

# 2. Use Cases, Links, and Steps

## 2.1 Spreadsheet

### Use Cases

- Used to record the inflow/outflow of money from each tenant/property owned
- Create a list of properties owned and their current tenants
- Create a list of the lease agreements and their most important terms
- Write and keep logs with updates
- Can be used to create summary reports on the performance of the properties/tenants using charts, graphs, etc.

### Apps & Links

1. **Microsoft excel:** spreadsheet with the name 'Portfolio'
2. **Google sheets:**  
<https://docs.google.com/spreadsheets/d/174j3Qaz3fumDbh7CH-Mu11WwtLr-l0g5jVp9qLImRbs/edit?usp=sharing>

#### Step 1

- Complete the templates for each of your properties

#### Step 2

- Complete the templates for each of your tenants

#### Step 3

- Add all of your lease agreements and their relevant terms

#### Step 4

- Record the inflow of cash from your rental payments

#### Step 5

- Update each section of the spreadsheet with new information
- Check the dashboard on monthly basis to track portfolio performance

# 2. Use Cases, Links, and Steps

## 2.2 Calendars

### Use Cases

Calendars can be used to **set reminders of important dates relevant to the tenancy** (i.e. termination date, rent-review date, etc.). Ensuring that the dates are enforced as per the agreement can help prevent potential loss of money and disputes between the landlord and the tenant. For example, if the two parties forget that the rent was supposed to increase, the landlord may lose that increase for several months.

### Apps & Links

1. Google Calendar: <https://apps.apple.com/us/app/google-calendar-get-organized/id909319292>
2. Apple Calendar: <https://apps.apple.com/us/app/calendar/id1108185179>
3. Calendar.com: <https://apps.apple.com/us/app/calendar-meeting-scheduling/id1459006638?ls=1>

#### Step 1

- Create a list of all important events that will happen during your tenancy (i.e. rental payments, notice periods, termination dates, etc.)
- Write down the action you need to take when the event occurs

#### Step 2

- For each event, write down the date at which you need to act. For example if a notice for renewal is required prior to a specific date, then ensure reminders are set before that date
- Write down how many reminders you should receive

#### Step 3

- Download one of the mobile apps

#### Step 4

- Record all the reminders on the app
- Ensure all reminders have one or more alarms set

#### Step 5

- Once you receive a reminder, act swiftly and accordingly

# 2. Use Cases, Links, and Steps

## 2.3 Notebook

### Use Cases

- Record inflows/outflows of money
- Create to-do lists for your properties/tenants
- Write reminders of important dates or clauses for ease of mind
- Record communications with your tenants

### Apps & Links

1. **Evernote:** <https://apps.apple.com/us/app/evernote-notes-organizer/id281796108>
2. **Microsoft OneNote:**  
<https://apps.apple.com/us/app/microsoft-onenote/id410395246>
3. **Notes on iOS:**  
<https://apps.apple.com/us/app/notes/id1110145109>

#### Step 1

- Create a list of topics you would like to keep notes/records on (i.e. to-do list, maintenance requests, etc.)

#### Step 2

- Choose one or multiple methods of note taking that will help you organise your notes in a suitable way

#### Step 3

- Download one of the mobile apps

#### Step 4

- Create separate sections/notebooks; one for each topic

#### Step 5

- Start taking notes



# 2. Use Cases, Links, and Steps

## 2.4 Banking Apps

### Use Cases

- Used to confirm the receipt and the date of payment from tenant/s
- If payments are made through a deposit or a cheque then the relevant documents can be stored on the App used
- App could notify you automatically if a payment is made making it easier to keep track of safe receipt of payment

### Apps & Links (Banks in Cyprus)

1. Bank of Cyprus: <https://apps.apple.com/cy/app/bank-of-cyprus-τράπεζα-κύπρου/id518802910>
2. Hellenic Bank: <https://apps.apple.com/us/app/hellenic-bank/id1027704531>
3. Alpha Bank: <https://apps.apple.com/us/app/myalpha-mobile/id378674531>
4. Astro Bank: <https://apps.apple.com/us/app/astrobank-mobile-banking/id503524782>
5. RCB: <https://apps.apple.com/us/app/rcb-mobile-banking/id1296253677>
6. Eurobank: <https://apps.apple.com/us/app/eurobank-cy/id1361612317>

### Step 1

- Ask tenant to send monthly payments to your bank account through a standing order
- Ask tenant to record each transfer using the following format *“Payment of rent\_Full Name of Tenant\_Name of Property”*

### Step 2

- Download the mobile app of your bank

### Step 3

- At the beginning of each month, check that the correct payments have been made
- If rents were paid through a cash or cheque deposit, attach the relevant document on the respective payment using the app

### Step 4

- At the end of each year when the tax statement has to be submitted to the Authorities, use the app to check the amounts you have received

# **3. Completing the Spreadsheet**

# 3. Completing the Spreadsheet

## 3.1 Step 1 - Complete Property Templates

### Before

4				
External Photo	Type	Basic	Country	Location
	No. of Bdrms		City	
Internal Photo	Unit. No.		Post Code	Internal
	Floor No.		Address	
	Covered Internal	Areas	Heating	
	Covered Verandas		Parking	
	Uncovered Verandas		A/C	
			Furnished	
	Sheet	Technical	Reg. No.	
	Plan		Municipality/ Commu.	
	Parcel No.		Quarter	
	Owner's Name		% Ownership	



### After

2 Bdrm House in Nicosia, Nicosia				4
External Photo	Type	Basic	Country	Location
	No. of Bdrms	House	Cyprus	
Internal Photo	Unit. No.	2	City	Nicosia
	Floor No.	201	Post Code	
	Covered Internal	Areas	Address	Leof. Lemesou 26
	Covered Verandas	150sqm	Heating	
	Uncovered Verandas	50sqm	Parking	Yes
		20sqm	A/C	Yes
			Furnished	Yes
	Sheet	Technical	Reg. No.	0/1234
	Plan	30	Municipality/ Commu.	
	Parcel No.	50W2	Quarter	Agios Andreas
	Owner's Name	Andreas Constantinou	% Ownership	100%

### Instructions/Notes

- Complete grey boxes
- In case one of them has a drop-down list, use one of the choices
- Insert high-quality external and internal images of the property
- The custom property name (i.e. “2 Bdrm House in Nicosia, Nicosia”) is generated automatically once the grey boxes have been completed
- The number on the top-right corner of the template is pre-set. It should not be changed
- Update boxes if anything changes (i.e. new title deeds are issued)

# 3. Completing the Spreadsheet


## 3.2 Step 2 – Complete Tenant Templates

### Before

Tenant 1	
Photo	
Name	
Surname	
E-mail	
Phone	
ID number	
Sec. contact number	
Sec. address	
Property Assigned (No.)	
Property Assigned (Name)	#N/A



### After

Tenant 1	
	
Name	Evgenia
Surname	Andreou
E-mail	<a href="mailto:evg.andreou@hotmail.com">evg.andreou@hotmail.com</a>
Phone	99-123456
ID number	123456
Sec. contact number	99-123456
Sec. address	
Property Assigned (No.)	1
Property Assigned (Name)	2 Bdrm House in Nicosia, Nicosia

### Instructions/Notes

- Complete grey boxes
- Insert high-quality profile picture of the tenant
- “*Property Assigned (Name)*” is automatically generated once “*Property Assigned (No.)*” is added
- Update templates with new tenant information. For new tenants, use existing templates or create new

# 3. Completing the Spreadsheet

## 3.3 Step 3 – Complete Lease Agreement Clauses

### Before

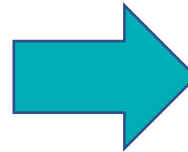
Property No.	Property Name	Tenant Name	Lease ID
	#N/A		
	#N/A		
	#N/A		

Initial Monthly Rent	Lease Start Date	Lease End Date	Break-clause interval	Deposit amount

Rent Payment Schedule	Renewals	Guarantors	% Rent Growth (Year 1)	% Rent Growth (Year 2)

% Rent Growth (Year 3)	% Rent Growth (Year 4)	% Rent Growth (Year 5)	Utilities (LL/Tenant)

Comm. Expenses (LL/Tenant)	Comm. Expenses (Amount)	Pets Allowed	Notes/Comments



### After

Property No.	Property Name	Tenant Name	Lease ID
1	2 Bdrm House in Nicosia, Nicosia	Evgenia Andreou	LA1_1
2	1 Bdrm Flat in Strovolos, Nicosia	Andreas Christou	LA2_1
3	2 Bdrm Flat in Agios Athanasios, Limassol	Olivia Johnson	LA3_1

Initial Monthly Rent	Lease Start Date	Lease End Date	Break-clause interval	Deposit amount
€ 700	15/02/2021	15/02/2022	n/a	€ 1,400
€ 600	01/02/2021	01/02/2022	n/a	€ 1,200
€ 800	01/03/2021	01/03/2022	n/a	€ 1,600

Rent Payment Schedule	Renewals	Guarantors	% Rent Growth (Year 1)	% Rent Growth (Year 2)
Monthly	No	No	3%	0%
Monthly	Yes	No	0%	0%
Monthly	Yes	No	1.5%	0%

% Rent Growth (Year 3)	% Rent Growth (Year 4)	% Rent Growth (Year 5)	Utilities (LL/Tenant)
0%	0%	0%	Tenant
0%	0%	0%	Tenant
0%	0%	0%	Landlord

Comm. Expenses (LL/Tenant)	Comm. Expenses (Amount)	Pets Allowed	Notes/Comments
Tenant	€ 60	No	
Tenant	€ 50	No	
Tenant	€ 80	No	

### Instructions/Notes

- Complete grey boxes
- In case one of them has a drop-down list, use one of the choices
- “Property Name” & “Lease ID” are automatically generated once “Property No.” is added
- Each new lease agreement should fill a separate line. Do not replace existing lines.

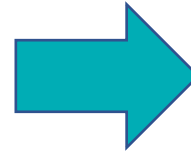
# 3. Completing the Spreadsheet

## 3.4 Step 4 – Record Status of Rental Payments

### Before

Lease ID	Property No.	Tenant Name

Rental Income	Month	Year	Status of Payment



### After

Lease ID	Property No.	Tenant Name
LA1_1	2 Bdrm House in Nicosia, Nicosia	Evgenia Andreou
LA2_1	1 Bdrm Flat in Strovolos, Nicosia	Andreas Christou
LA3_1	2 Bdrm Flat in Agios Athanasios, Limassol	Olivia Johnson

Rental Income	Month	Year	Status of Payment
€ 700	February	2021	Paid
€ 600	February	2021	Pending
€ 800	March	2021	Paid

### Instructions/Notes

- Complete grey boxes
- In case one of them has a drop-down list, use one of the choices
- “*Property No.*”, “*Tenant Name*”, and “*Rental Income*” are automatically generated once “*Lease ID*” is added
- Each payment should fill a separate line. Do not replace any existing lines.

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