



LEASING - TENANT ONBOARDING (SAMPLE)

Name this process as [Property name] - [Tenant name]

Property Name (Required)

Property Address (Required)

Property Manager Name (Required)

Tenant Name (Required)

Tenant Contact Number

Tenant Contact Email



Enter property details

Assignees:

Process Starter

Deadline:

1 day after a process is launched

Property Name: [Property Name]

Property Address: [Property Address]

Property Manager: [Property Manager Name]

Property Code/ID


Sqft (Required)

Rent per sq. ft. (Required)

Amount for security deposit

Availability from date

2 Enter tenant details

Assignees: Process Starter 	Deadline: 1 day after a process is launched
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Tenant name: [Tenant Name]

Tenant contact number: [Tenant Contact Number]

Tenant email: [Tenant Contact Email]

Please collect additional tenant details

Tenant Address

Expected move-in date (Required)

Occupation

Employer Name

Employer Address

Emergency Contact Name

Relationship

Emergency Contact Number

3 Complete background check for tenant

Assignees:

Process Starter

Deadline:

2 days after Step 2: Enter tenant details

Perform background and credit score on the tenant. Please do not mark this task complete if the background check does not come back positive. Inform Area/Property Manager about this.

Upload background check report

 Attach file(s)

Upload credit score report

 Attach file(s)

Notes

4 Provide information to create lease agreement

Assignees:

Process Starter

Deadline:

2 days after Step 3: Complete background check for tenant

Provide information to office manager in order to create a lease agreement. Please use the following standard template for creating the lease agreement and update the required details.

[Lease Agreement Template](#)

Lease Type

- Residential
- Commercial

Lease Start Date (Required)

Lease duration

Option to renew

- Non-renewable
- Renewable

Rent amount per month

Notice period for move out (in days)

Clauses

Changes/Repairs required? (Required)

- Yes
- No

Notes

5 Create lease agreement

Assignees:

Process Starter

Deadline:

2 days after Step 4: Provide information to create lease agreement

Upload lease agreement and send for review to property manager.

Property Name:

[Property Name]

Tenant Name:

[Tenant Name]

Rent per sqft:

[Rent per sq. ft.]

Lease Start Date:

[Lease Start Date]

Lease Type:

[Lease Type]

Lease Duration:

[Lease duration]

Rent amount per month:

[Rent amount per month]

Clauses:

[Clauses]

Link to lease agreement

6  Review lease (internal)

Assignees:

Process Starter

Deadline:

1 day after Step 5: Create lease agreement

Please review the following lease for approval:

[Link to lease agreement]

Approve lease? (Required)

Yes

Not yet - please see notes

Notes

7  Update lease agreement

Assignees:

Process Starter

Deadline:

1 day after Step 6: Review lease (internal)

Review feedback and update lease agreement:

[Link to lease agreement]

Feedback notes:

[Notes]

8  **Send lease agreement to tenant**

Assignees:

Process Starter 

Deadline:

3 days after Step 6: Review lease (internal)

Hi [Tenant Name],

Please find the lease agreement at the following link:

[Link to lease agreement]

Kindly insert signatures at the mentioned spots. Please handover the signed lease agreement along with the security deposit check at the office.

If you have any questions or need to request changes, please let us know in the notes sections below.

Thank you.

Notes

9  **Collect security deposit and 1st month's rent**

Assignees:

Process Starter

Deadline:

4 days after Step 6: Review lease (internal)

Office Manager sends details to accounting

Check number for reference

Reference ID for 1st month rent

10  **Issue work order for changes/repairs and installations**

Assignees:

Process Starter

Deadline:

2 days after Step 9: Collect security deposit and 1st month's rent

Start work on changes/repairs/installations and communicate schedule with subcontractors

Input work order

11  **Complete work order**

Assignees:

Process Starter

Deadline:

1 week after Step 10: Issue work order for changes/repairs and installations

Review work completed by subcontractors

12  **Prepare for move-in**

Assignees:

Process Starter

Deadline:

10 days after Step 9: Collect security deposit and 1st month's rent

Confirm with client pre-move in details of the property.
Assign parking space and inform facility manager.
Handover two set of keys

Checklist for task (Required)

- Check for HVAC
- Handover 2 set of keys
- Assign parking space

13  **Conduct a post move-in check in and feedback visit**

Assignees:

Process Starter

Deadline:

2 weeks after Step 12: Prepare for move-in

Feedback Notes
