

This will rotate pictures of Residential and Commercial income properties

Creating Co-Ownership in Real Estate Income Properties

Rotate Messages with each rotation of picture

Explainer White Board Video

FAQs

Company

Terms

Privacy Policies

Contact

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Log In

Logo

Sign in with Facebook

Sign in with Google


User Name

Password

Log In

Forgot Username or Password?

Forgot Password

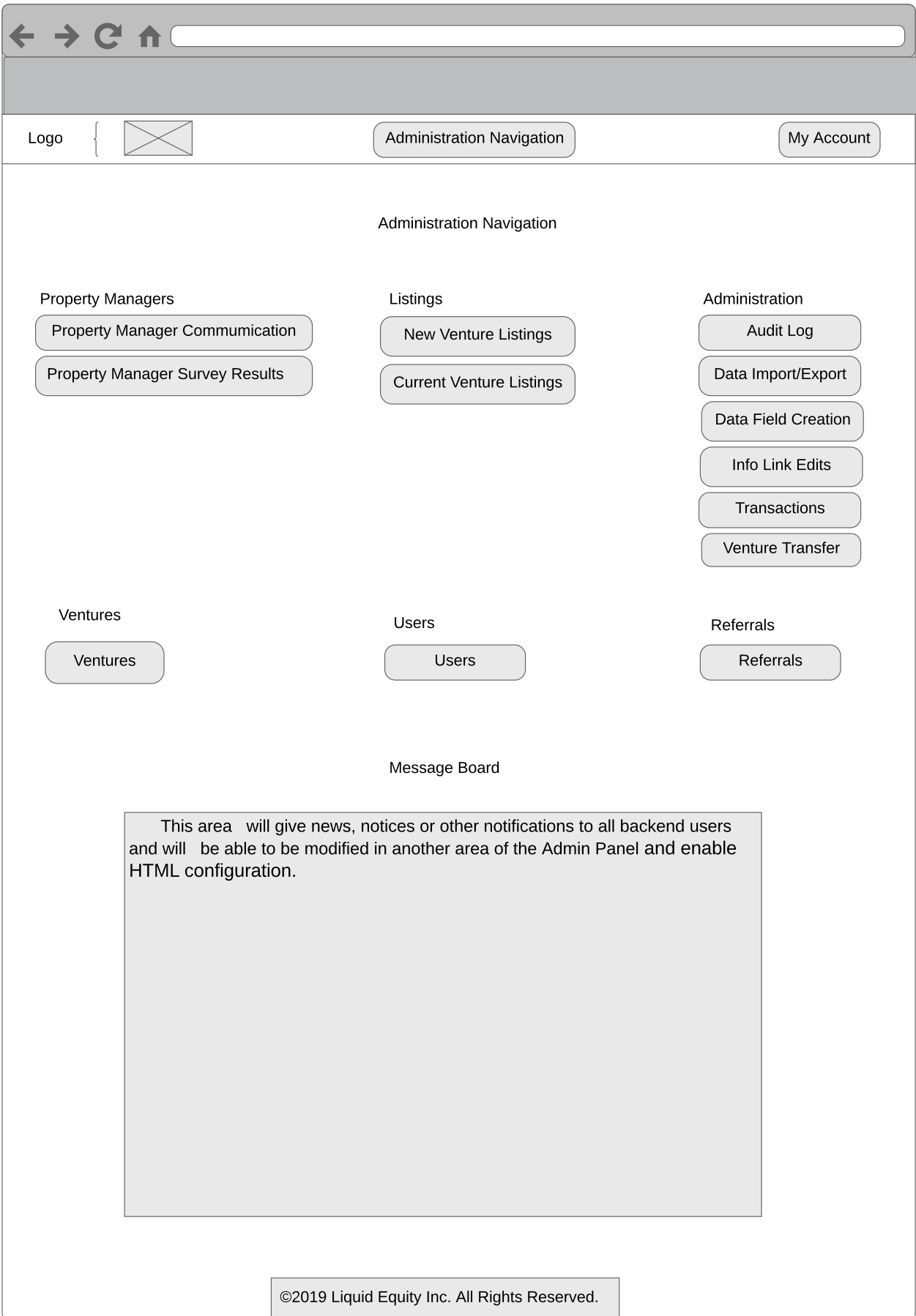
Logo { 


Forgot password? Please enter your email address and we will send you a link to reset your password

Email

Submit

Once the email is submitted, it will show message" Email has been sent to {email} with a link to reset your password



Logo { 

Administration Navigation

My Account

Be searchable by anything in the listings

Current Venture Listings

search listings

Create Current Venture Listing

Date Listed

1/1/10

To

1/1/10

Venture Name

Venture ID

Listing ID

Asking Price from

To

Asking Price to

Venture Type

☒ Single Family

☐ Multi Family

☐ Retail

☐ Commercial

☐ Any

Listing Status

☒ Live

☐ Pending

☐ Inactive

Submit Query

↓

Export Member Listings

This will download all listings in the system into a CSV formatted document

Listing ID	Ownership Sequence	Venture Name	Asking Price	Seller's email	Featured Listing	Date Listed	Listing Status
L9879	V03:1251:2500	Test Venture V03	\$8,500	Member1@member.com	Yes	07/01/2019	Live
L987	V04:5001:6000	Test Venture 04	\$147,000	email1@member.com	No	09/15/2019	Pending
L1234	V02:701:3000	Test Venture V02	\$13,000	testmember@test.com	No	07/15/2019	Inactive

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Create Current Venture Listing

search

Venture Name

Venture ID

Search Ventures

Select	Venture Name	Venture ID
<input checked="" type="checkbox"/>	Test Venture 8	V987654
<input type="checkbox"/>	Test Venture 9	V456789


search

User ID

Search Users

Select	User Name	User ID
<input checked="" type="checkbox"/>	test@test.com	M2345
<input type="checkbox"/>	wronguser@test.com	M124

Create Current Venture Listing

Logo { 

Administration Navigation

My Account

Current Venture Listing Creation

Listing ID

L4567

Auto Populate User ID

Auto Popuplate User Name Email

Venture Type

☒ Single Family

☐ Multi Family

☐ Retail

☐ Commercial

Listing Status

☒ Live

☐ Pending

☐ Inactive

Auto Popuate Venture ID

☒ Feature Listing

Auto Populate Venture Name

Description

Asking Price

% of total Ownership for sale

CAP Rate %

Photo

Photo

Photo


Photo

Auto Populate Property Street

Auto Populate Property City

Auto Populate Property State

Auto Populate Property Zip

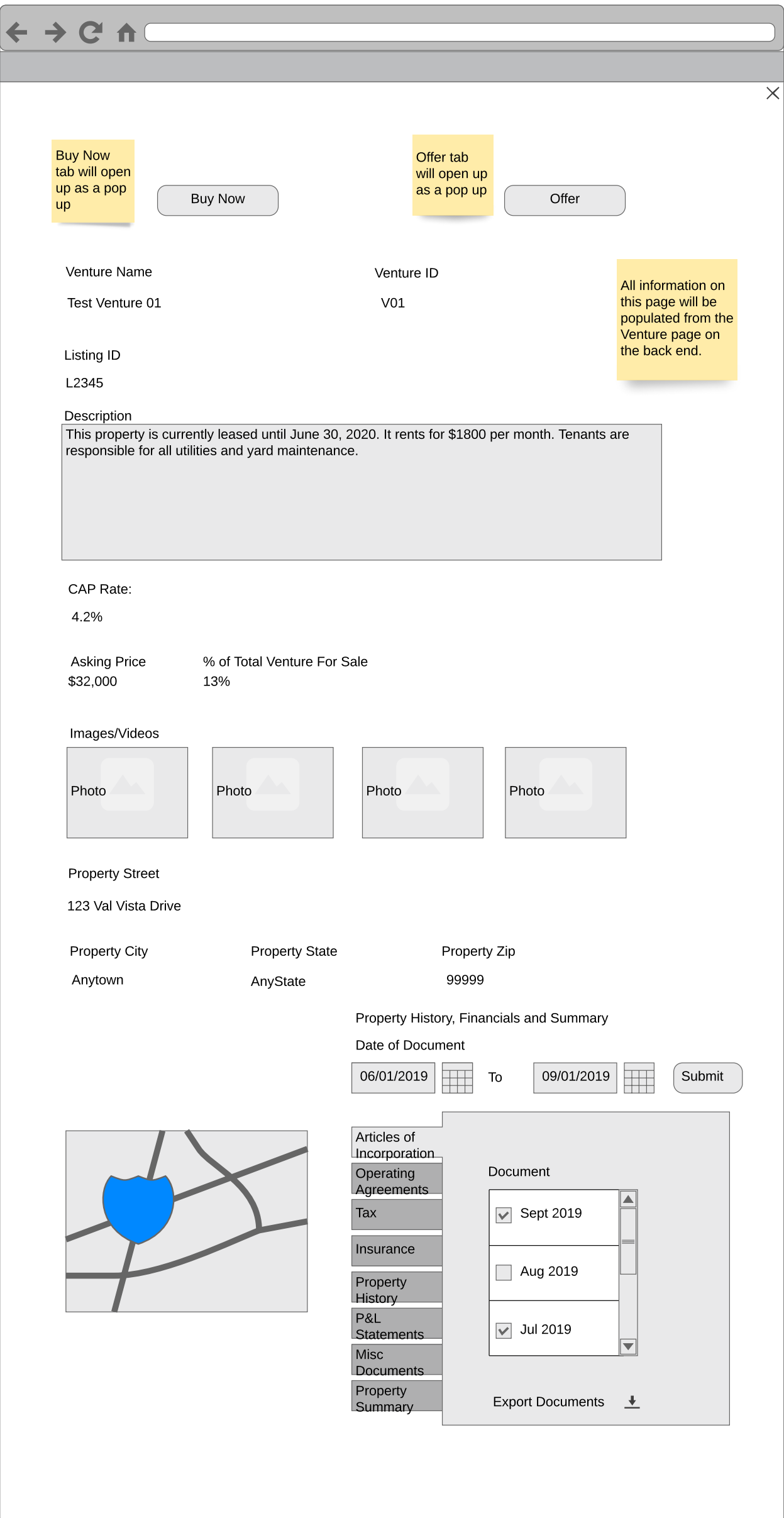



Preview

Save

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CAP RATE will be calculated by taking the last 12 months of income for that ownership % and dividing it by the asking price... Example: 12 month income = \$1,000/\$15,000 for asking price =6.67%



Logo { 

Administration Navigation

My Account

Be searchable by anything in the listings

New Venture Listings

search listings

Create New Venture Listing

Date Listed

1/1/10

To

1/1/10

Venture Name

Venture ID

Listing ID

Target Amount from

To

Target Amount to

Venture Type

☒ Single Family

☐ Multi Family

☐ Retail

☐ Commercial

☐ Any

Listing Status

☒ Live

☐ Pending

☐ Inactive

Submit Query

Export Results from New Venture Listings Query

This will download all listings in the system into a CSV formatted document

Listing ID	Venture Name	Date Fund By	Target amount	% Committed	Date Listed	CAP RATE	Listing Status
L6549	Test Venture V08	10/15/2019	\$600,000	65%	9/1/2019	4.3%	Live
L987	Test Venture V09	10/1/2019	\$453,000	34%	9/2/2019	5.1%	Pending
L34556	Test Venture V10	11/15/2019	\$355,000	0%	10/15/2019	6.3%	Inactive

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Create New Venture Listing

search

Venture Name

Venture ID

Search Ventures

Select	Venture Name	Venture ID
<input checked="" type="checkbox"/>	Test Venture 8	V987654
<input type="checkbox"/>	Test Venture 9	V456789

Create New Venture Listing

Logo

{

Administration Navigation

My Account

New Venture Listing Creation

Listing ID

L123456

Venture Type

☒ Single Family

☐ Multi Family

☐ Retail

☐ Commercial

Listing Status

☒ Live

☐ Pending

☐ Inactive

☒ Feature Listing

Date Fund By

1/1/10

Auto Populate Venture Name

Auto Populate Venture ID

Description

Auto Populate Target Amount

Auto Populate CAP Rate

Photo

Photo

Photo

Photo

Auto Populate Property Street

Auto Populate Property City

Auto Populate Property State

Auto Populate Property Zip

Upload Property Details

Choose File

No file chosen

Name of Document

Preview

Save

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Commit tab will open up as a pop up

Commit

All information on this page will be populated from the Venture page on the back end.

Venture ID

L45789

Venture Name

Test Venture 9

Venture ID

V09

Description

This property is currently leased until June 30, 2020. It rents for \$1800 per month. Tenants are responsible for all utilities and yard maintenance.

CAP Rate:

4.5%

Target Amount

\$350,000

Images/Videos

Photo

Photo

Photo

Photo

Property Street

123 Val Vista Drive

Property City

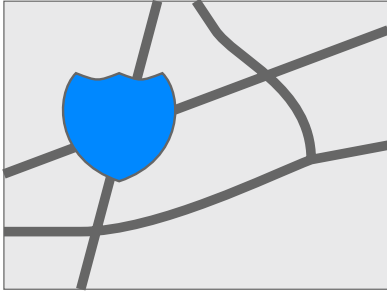
Anytown

Property State

Anystate

Property Zip


99999



Property Summary

↓

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Logo { 

Administration Navigation

My Account

Search users using anything that is in their file

Search Users

Create New User

Date Created

07/01/2019

To

09/01/2019

User Type

☐ Annual Member

☒ Month to Month Member

☐ Admin

☐ Power Admin

☐ Perspective User

☐ Property Manager

☐ Any User

Submit query

User Status

☒ Open Access

☐ Open Access Locked

☐ Limited Access

☐ Limited Access Locked

☐ Inactive

☐ Cancelled

Export all users in CSV format

Export Users

User ID	First Name	Last Name	Date Created	Email Address	User Type
U46598	Tom	Tate	07/05/2019	tt@stallion.com	Month to Month Member
U85632	Dianna	Lopez	08/05/2019	hrd@sitcom.com	Admin
U00125	Tom	Brown	08/06/2019	Tombrown@tb.com	Property Manager

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Logo

Administration Navigation

My Account

User Management

Reset Password

User Type

☐ Annual Member

☒ Month to Month Member

☐ Admin

☐ Power Admin

☐ Perspective User

☐ Property Manager

User Status

☒ Open Access

☐ Open Access Locked

☐ Limited Access

☐ Limited Access Locked

☐ Inactive

☐ Cancelled

User Personal Information

User ID: M4657

First Name TestMember First1

Last Name TestMember Last1

Phone Number 206-555-1212

DOB 12/30/1970

SSN ***-**-4561

Email Address/User Name TestMember1@test.com

Street 123 Anystreet

City AnyCity

State AnyState

Zip 99999

Edit

Membership Fee Structure

☒ Monthly fee

☐ Annual fee

Membership Fee \$99.00

Save

Profile Pic

Choose file

No file chosen

Name of Picture

Upload

Date of next charge

11/01/2019

Current Credit Card ending in 4564

CC Expires 05/20

Change Payment Information

Visa

Master Card

American Express

Discover

Account Number

CVC

Expiration

Save New Payment Information

Credit Card information.
This will be a plug in

Member Referral Information

Date of Referral

06/01/2019

To

10/01/2019

Submit

Referral	Date of referral	Referral Status	Date Referral Join	Date Referral Bonus
John Tomas	09/01/2019	Joined	09/25/2019	10/01/2019
Jose Taquela	07/01/2019	In Process		

Portfolio

Venture Name	Venture ID	% Owned	Date Purchased	Purchase Price	Current Approximate Valuation	Original CAP	Current Estimated CAP	Current Ownership Status	Ownership Action
LLC1	123456	8.2%	09/01/2018	\$45,000	\$46,500	6.4%	6.8%	Active	Sell
LLC2	78451	5%	01/01/2019	\$22,089	\$24,050	8.1%	8.2%	For Sale	Cancel Sale
LLC3	9876	.2%	02/01/2019	\$500	\$556	4.1%	4.3%	Offer Made	Sell

Historical Ownership by Date Sold

Date Sold

1/1/2019

To

09/01/2019

Query

Venture	Venture ID	% Owned	Date Purchased	Date Settled	Purchase Price	Sold Price	Original CAP	Final CAP	ROI	Current Ownership Status
LLC4	123457	10.2%	01/01/2018	01/01/2019	\$45,000	\$46,500	6.4%	7.1%	10.4%	Sold
LLC5	654987	2.2%	01/01/2018	10/01/2019	\$15,000	\$17,359	3.8%	4.1%	12.5%	Pending

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Logo

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Administration Navigation

My Account

Search Referrals using anything that is in their file

Member Referral Information

Search Referrals

Create New Referral

Referral Status

Date of Referral

Joined

Not Joined

In Process

07/01/2019

To

09/01/2019

Submit Query

Referral	Date of Referral	Date of Last Contact	Date of Next Follow Up	Last Follow Up Comment	Referral Status
John Tomas	09/01/2019	09/25/2019	10/15/2019	Called and left message & emailed	In Process
Jose Taquela	07/01/2019	10/01/2019	10/15/2019	Attended Seminar	In Process

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Logo

Administration Navigation

My Account

Referral Management

User ID U456789

Referral Status

Joined

Not Joined

In Process

Referral Bonus Awarded

When this box is checked, it will automatically add a Date of Referral Bonus

Referral First Name

Tom

Referral Last Name

Test

Referral Phone Number

452-555-1212

Referral Email Address

test@test.com

Referred By

Peter Member

Referred By ID

321654

Save

Create New User

Follow up actions

Date of Referral First Contact	Date of Last Contact	Date of next follow up	Follow Up Comment
09/05/2019	09/25/2019	10/01/2019	Wanted to come to seminar
08/25/2019	09/25/2019	10/15/2019	Busy and would like a call back

Follow Up Comment

Date of Next Follow Up

1/1/10

Submit follow up

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Logo

Administration Navigation

My Account

Venture Management

Venture Status

Active

Inactive

Save

Venture ID

0024863

Venture Name

Val Vista 123 LLC

Date of Incorporation

05/06/2019

Date of Purchase

07/01/2019

Purchahse Price

\$280,000

Initial CAP

5.2%

Staff Manager:

Sam Adams

Managing Member:

Liquid Equity LLC

Venture Street

1234 Anystreet

Venture City:

SLC

Venture State:

Utah

Venture Zip:

84107

Edit

Property Specifics

Venture Type

Single Family

Multi Family

Retail

Commercial

Venture Sourced Type

In House

Member

Other

Property Street

456 Any Street

Property City

Any City

Property State

Any State

Proptery Zip

99999

Property Management Company

Aspen Property Management Associates

Property Management Contact

Paul Evans

Property Management Street

548 Aspen Crest

Property Management Phone

801-555-1212

Property Management City

Any City

Property Management State

Any State

Property Management Zip

99999

Download information

Date of Document

06/01/2019

To

09/01/2019

Submit

Bank Statements

Articles of Incorporation

Operating Agreements

Tax

Insurance

Purchase & Sales

Property History

P&L Statements

Misc Documents

Property Summary

Document

Sept 2019

Visible

Hidden

Aug 2019

Visible

Hidden

Jul 2019

Visible

Hidden

Upload Information

Document Type

Bank Statments

Articles of Inc.

Operating Agreement & Adendums

Tax Documents

Insurance

Purchase & Sales Agreement

Property History

P&L Statements

Misc Documents

Property Summary

Visibillity

Visible

Hidden

Choose File

No file chosen

Name of Document

Date of Document to Apply

06/01/2019

Upload

Pictures

Choose File


No file chosen

Name of Pic/Video

Upload

Allow upload up to 10 Pictures

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Logo { 

Administration Navigation

My Account

Audit Log

User Type

☐ Annual Member

☒ Month to Month Member

☐ Admin

☐ Power Admin


☐ Prospective User

☐ Property Manager

☐ Any User


Date of Action


09/19/2019



To


09/19/2019





Keyword, user name, User ID, Venture ID or anything else

Submit Query

 Export Actions CSV

User Email	User ID	Action	User Type	Date and time of Action
Test@test.com	M564	Posted LLC1 For Sale	Annual Member	09/19/2019 4:23 PM
testmember@test.com	M4567	Changed Address	Power Admin	09/19/2019 4:56 PM
Test@test.com	M955	Log In	Month to Month Member	09/19/2019 5:22 PM

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Logo

Administration Navigation

My Account

Data Import/Export

Saved Maps

search for saved maps

Aspen Management
Ace Property Management
Carot Property Group

☒ Import

Choose File

No file chosen

Name of Document

Upload

Date Range

07/01/2019

To

09/01/2019

File Export Name

Date Type

Date Created

Date Fund By

Date Purchased

Date Settled

Date of Action

Export Query

☐ Export

Import/Export Map Creator

Entity ID
Payment Date
Rental Status
Tenant Name
Maintenance Costs
DEAD SPACE
Repair Costs
Utilities
Property Tax
Insurance
Property Management Fees
Reserves
Unit #
Unit Type
Lease Start Date
Term
Move In Date
Lease Expiration
Security Deposit
Rent
Parking
Last Increase Date
Concessions
Maintenance
Repair
Utilities
Property Tax
Insurance
Property Management Fee
Reserve
Balance Due
Net Rent Collected
Comment
Outstanding Late Fee
Vacancy

Venture
Current Value
DEAD SPACE
Paid
Processing Fee
Monthly Income
DEAD SPACE
% Owned
Date Purchased

These arrows will allow the different data fields to be moved to they can match the document that is being imported

These arrows allow the user to move data fields into the new map

New Import /Export Map Name

Save Map

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Logo

Administration Navigation

My Account

Data Field Creation

Select Data Field Type to create

Date

Number

Text

Memo

Currency

Percentage

Calculated

Data Field Name

Create Data Field

Available Data Fields

search

Venture ID

Payment Date

Rental Status

Tenant Name

Maintenance Costs

DEAD SPACE

Repair Costs

Utilities

Property Tax

Insurance

Property Management Fees

Reserves

Unit #

Unit Type

Lease Start Date

Term

Move In Date

Lease Expiration

Security Deposit

Rent

Parking

Last Increase Date

Concessions

Maintenance

Repair

Utilities

Property Tax

Insurance

Property Management Fee

Reserve

Balance Due

Net Rent Collected

Comment

Outstanding Late Fee

Vacancy

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Logo

Administration Navigation

My Account

Home Page Messaging

Image 1

HTML - This is the first message for the first image

Image 2

HTML -This is the second message for the second image

Image 3

HTML -This is the third message for the third image

Image 1

Image 2

Image 3

Choose File

No file chosen

Name of Picture

Upload

Apply Changes

Explainer Video

Video

HTML - message


Choose File

No file chosen

Name of video

Apply Changes

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Logo { 

Administration Navigation

My Account

Admin Link Edits

Select page to edit

☒ FAQs

☐ Company

☐ Terms

☐ Privacy Policy

☐ Admin Navigation

Edit Space

Publish

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Logo

Administration Navigation

My Account

Property Manager Communication

Which Venture is this commuication for?

Search for Ventures

Test Venture 1

Test Venture 2

Test Venture 4

Test Venture 5

→

←

To:

Test Venture 3

Communication Subject Title

Unit 2 needs a fridge

Body of message

Dear \${Member Name},

We have an item that needs your feedback. Please provide your direction as soon as possible. We are under contract to provide a solution within 5 business days. If you would like to provide an alternative solution, we will need that by no later than 3 pm tomorrow so we can send that out for all owners approval. If there are no alternative solutions, I will take the majority decision per operating agreement and implement that.

Thank you for your time,

Properlyt Manager

Please note: This survey will automatically close in 5 days and results will be sent out at that time.

Question Types

☒ Multiple Choice

of choices

3

☐ Open Text

☐ Multi-Select

of choices

4

☒ Days to close survey

5

Create Question Options

Multiple Choice Question

Unit 2 is in need of a refridgerator replacement, Would you like us to purchase a new one for \$875, a used one for \$350 or accept the free one offered by one of the owners?

☐ Buy New

☐ Buy Used

☐ Free from an owner

Attachment

Preview

Preview

Unit 2 needs a fridge

Dear Tom,

We have an item that needs your feedback. Please provide your direction as soon as possible. We are under contract to provide a solution within 5 business days. If you would like to provide an alternative solution, we will need that by no later than 3 pm tomorrow so we can send that out for all owners approval. If there are no alternative solutions, I will take the majority decision per operating agreement and implement that.

Thank you for your time,

Properlyt Manager

Please note: This survey will automatically close in 5 days and results will be sent out at that time.

Please Answer the following:

Unit 2 is in need of a refridgerator replacement, Would you like us to purchase a new one for \$875, a used one for \$350 or accept a free one from one of the owners?

☐ Buy New


☐ Buy Used

☐ Free from an owner

Submit Decision

Send Message

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Logo { 

Administration Navigation

My Account

Property Manager Feedback Data

Venture Search

search

Test Venture 3

Test Venture 4

Test Venture 5

→

←

Test Venture 1

Test Venture 2

Date of Communication

01/19/2019

To

10/03/2019

☒ Results Sent

Query

Date of Communication	Communication ID	Venture Name	Question(s)	Summary	Time until voting closes	Results Sent
10/03/2019	C00002	Test Venture 1	Unit 2 is in need of a refridgerator replacement, Would you like us to purchase a new one for \$875, a used one for \$350 or Free one from another member?	8 owners 68% Yes 3 owners 12% No 1 owner 20% Free from owner	3d:11h:32m:15s	<input type="checkbox"/>
06/08/2019	C00001	Test Venture 2	Would you like use x company as the plumber or Y	19 owners 57% X Company 4 owners 43% Y Company	0d:0h:0:m:0s	<input checked="" type="checkbox"/>

These will be the questions asked from the Property manager Survey

These will be the responses from the Property manager survey

This will show the time left in the survey for the Property Manger. Once time runs out, an automatic message with the results will be sent out to everyone that received the original communication. Will auto check this box once notice is sent.

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Logo

Administration Navigation

My Account

Transactions

search Transactions

Venture Name

Venture ID

Listing ID

Transaction Status

Venture Category

Venture Type

New

In Process

Completed

New Venture

Current Venture

Single Family

Multi Family

Retail

Commercial

Any

Date Listed

1/1/10

To

1/1/10

↓

Export Transactions

Submit Query

Transaction Results

Last Date of Transaction Note	Listing ID	Venture Name	Transaction Type	Seller ID	Buyer ID	Transaction Status
10/01/2019	L5765	157 Val Vista	Offer	M456789	M45612	New
09/23/2019	L893245	Hampton LLC	Buy Now	M462315	M46321	In Process
10/02/2019	L5632	Test Venture 1	Commit			Completed

Only Ventures with Offer, Buy Now or Committ will show up here.

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Transaction Type:
Buy Now

Transaction Status

New

In Process

Completed

Transaction Details

Listing ID

L12345

Venture Name

Test Venture 1

Venture ID

V01

Selling Price

\$32,000

% of Venture

13%

Buyer

Buyer's First Name

Member First1

Buyer's Last Name

Member Last1

Buyer's User ID

U01

Buyer's email

member01@test.com

Seller

Seller's First Name

Member First2

Seller's Last Name

Member Last2

Seller's User ID

U02

Seller's email

member02@test.com

Ownership Sequence

V0:10:2500

Buy Now Checklist

Notification sent of "buy now "offer to seller

Purchase & Sales , Operating Addendum & ACH form sent to buyer and seller

All documents signed and returned

All Documents uploaded

ACH buyer processed

ACH Seller payment

Ownership transferred

Notice of settlement sent to both buyer and seller

Choose File

No file chosen

Name of Document

Upload

Download all documents

Transaction Documentation

Name of Document	Download
Purchase & Sales Agreement	<div></div>
Buyer ACH Document	<div></div>

Notes Transaction Summary

Add Note

Date of Transaction Note	Comment
09/15/2019	Notification of buy now sent to seller
09/15/2019	P&S, Operating Addendum and ACH sent to buyer and seller
9/16/2019	All documents signed and returned
9/16/2019	All documents uploaded
9/16/2019	ACH processed from buyer
9/18/2019	ACH to Seller
09/18/2019	Ownership Transferred
09/18/2019	Notice of Settlement sent to both buyer and seller

Save

Transaction Type:
Offer

X

Transaction Status

New

In Process

Completed

Listing ID
Venture Name
Venture ID
Offer
% of Venture

L12345
Test Venture 1
V01
\$32,000
13%

Buyer
Buyer's First Name
Buyer's Last Name
Buyer's User ID
Buyer's email

Member First1
Member Last1
U01
member01@test.com

Seller
Seller's First Name
Seller's Last Name
Seller's User ID
Seller's email

Member First2
Member Last2
U02
member02@test.com

Ownership Sequence V04:2001:2500

Offer Checklist

☒

Notification of acceptance sent to both buyer and seller of final offer

☒

Purchase & Sales , Operating Addendum & ACH form sent to buyer and seller

☒

All documents signed and returned

☒

All Documents uploaded

☒

ACH buyer processed

☒

ACH Seller payment

☒

Ownership transferred

☐

Notice of settlement sent to both buyer and seller

Choose File

No file chosen

Name of Document

Upload

↓

Download all documents

Name of Document	Download
Purchase & Sales Agreement	<div>↓</div>
ACH Documents	<div>↓</div>
Operating Agreement Addendum	<div>↓</div>

Notes Transaction Summary

Add Note

Date of Transaction Note	Comment
09/30/2019	notification of Offer sent to seller
10/02/2019	Seller offers counter offer - sent to buyer
10/02/2019	Buyer accepts counter
10/02/2019	Notification of acceptance sent to both buyer and seller
10/02/2019	P&S, Operating Addendum and ACH sent to buyer and seller
10/04/2019	All documents signed and returned
10/05/2019	ACH processed from buyer
10/10/2019	ACH to Seller
10/10/2019	Ownership Transferred
10/10/2019	Notice of Settlement sent to both buyer and seller

Save

Logo

Administration Navigation

My Account

Venture Transfer

Transfer From Member

search

Test Member 1
Test Member 2
Test Member 3
Test Member 4
Test Member 5
Test Member 6

From

→
←

Test Member 7

Transfer To Member

search

Test Member 1
Test Member 3
Test Member 4
Test Member 5
Test Member 6

To

→
←

Test Member 2

Ownership Sequence

From Member Portfolio

V01:0:2500
V05:501:550
V06:951:1150

→
←

To Member Portfolio

V03:4501:5000

Transfer

Transfer results

New Owner	New Ownership Sequence
Test Member 2	V03:4501:5000

Manual Fractional Transfer

Enter Ownership Sequence

V03:4751:5000

Enter User ID to assign Sequence ownership to

U547

Preview

Current Ownership Sequence

Current Owner	Current Ownership Sequence
U235	V03:4501:5000

After Transfer Ownership Sequence

New Owners	New Ownership Sequence
U235	V03:4501:4750
U547	V03:4751:5000

Transfer

Cancel

Transfer Complete

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