Chabrin Lease Management System

User Guide

Version 2.0

Chabrin Agencies

February 2026

Chabrin Lease Management System - User Guide

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1. Introduction

The **Chabrin Lease Management System** is a comprehensive, web-based platform designed for Chabrin Agencies to manage the complete lifecycle of property leases — from drafting through approval, digital signing, document archival, and renewal.

Key Capabilities

- **End-to-end lease lifecycle** — Draft, approve, sign, activate, and renew leases
- **Digital signing** — Tenants sign leases online via OTP-verified signature pads
- **Document vault** — Centralized storage for scanned and digital lease documents
- **Zone-based hierarchy** — Organize properties and staff across geographic zones
- **Role-based access control** — Eight distinct roles with granular permissions
- **Real-time dashboards** — Portfolio analytics, revenue charts, and performance metrics
- **PDF generation** — Professional lease agreements with QR codes for verification
- **Audit trails** — Full traceability of every action on documents and leases

Technology Stack

Component	Technology
Backend Framework	Laravel 12 (PHP 8.4)
Admin Panel	Filament v4
Database	PostgreSQL 16
Frontend	Tailwind CSS, Alpine.js, Livewire
Real-time Updates	Livewire polling
PDF Generation	DomPDF / Blade templates
SMS Integration	Africa's Talking
Digital Signatures	Signature Pad JS

2. Getting Started

2.1 Logging In

1. Navigate to your system URL (e.g., `https://leases.chabrinagencies.co.ke/admin/login`)
2. Enter your **email address** and **password**
3. Click **Sign in**

> **Default Super Admin Accounts:**

>

>	Name	Email	Password

>	——————	—————————————————————————	—————————-
>	Stanely	stanely.macharia@chabrinagencies.co.ke	Chabrin@2026!
>	Kimathi	kimathiw@chabrinagencies.co.ke	password
>	Mark	mark.nyaga@chabrinagencies.co.ke	Chabrin@2026!

```
Screenshot placeholder: Login page
┌──────────────────────────────────────────────┐
│                                              │
│           □□Chabrin Agencies               │
│        Lease Management System               │
│                                              │
│   ┌──────────────────────────────────┐       │
│   │ Email                            │       │
│   └──────────────────────────────────┘       │
│   ┌──────────────────────────────────┐       │
│   │ Password                         │       │
│   └──────────────────────────────────┘       │
│                                              │
│        [ Sign in ]                           │
│                                              │
└──────────────────────────────────────────────┘
```

2.2 Navigation Structure

After logging in, you will see the **admin panel** powered by Filament. The sidebar contains:

Navigation Group	Items
Lease Portfolio	Portfolio Overview, Lease Agreements, Document Vault
People	Clients, Tenants
Assets	Properties, Units
Operations	Lawyers, Lease Templates
Administration	Users, Roles, Permission Dashboard
Dashboards	Company Dashboard, Zone Dashboard, Field Officer Dashboard

Monitoring	System Pulse, Document Audit, Print Log, Approval Tracking

```
Screenshot placeholder: Main navigation sidebar

┌──────────────────┬──────────────────────────────────────────────┐
│                  │                                              │
│  □□Lease        │    Main Content Area                         │
│   Portfolio      │                                              │
│   ├ Portfolio    │                                              │
│   ├ Lease Agr.   │   ┌──────────┐ ┌──────────┐ ┌──────────┐    │
│   └ Doc Vault    │   │ Active   │ │ Pending  │ │ Draft    │    │
│                  │   │ Leases   │ │ Approval │ │ Leases   │    │
│  □□People       │   │   142    │ │    23    │ │    8     │    │
│   ├ Clients      │   └──────────┘ └──────────┘ └──────────┘   │
│   └ Tenants      │                                              │
│                  │                                              │
│  □□Assets       │                                              │
│   ├ Properties   │                                              │
│   └ Units        │                                              │
│                  │                                              │
│  ⚙ Admin        │                                              │
│   ├ Users        │                                              │
│   └ Roles        │                                              │
│                  │                                              │
└──────────────────┴──────────────────────────────────────────────┘
```

2.3 Global Search

Use the **search bar** at the top of the page to instantly find leases across the entire system. The global search indexes:

- Lease reference numbers
- Unit codes
- Tenant names, national IDs, and phone numbers
- Property names and reference numbers
- Client names

Simply start typing and matching results appear with tenant name, property, unit, and status.

3. Dashboard Overview

3.1 Lease Portfolio Overview

The **Portfolio Overview** (`/admin/lease-portfolio`) is the default landing page. It provides a bird's-eye view of your entire lease portfolio.

Statistics Cards:

Card	Description
Total Leases	Total number of leases in the system
Active Leases	Currently active and running leases
Pending Approval	Leases awaiting landlord/client approval
Draft Leases	Leases still being prepared
Expiring Soon	Active leases expiring within 30 days
Expired Leases	Leases that have passed their end date

Additional Sections:

- **Document Statistics** — Total documents, pending review, approved, linked/unlinked counts
- **Recent Leases** — Last 5 updated leases with tenant, property, unit info
- **Recent Documents** — Last 5 uploaded documents
- **Monthly Trends** — 6-month charts for lease creation and document uploads
- **Quick Actions** — Buttons to create a lease, upload documents, or view review queue

```
Screenshot placeholder: Lease Portfolio dashboard

┌─────────────────────────────────────────────────────────────────┐
│  Lease Portfolio                                                │
│                                                                 │
│  ┌─────────┐ ┌─────────┐ ┌─────────┐ ┌─────────┐ ┌─────────┐  │
│  │ Total   │ │ Active  │ │ Pending │ │ Draft   │ │Expiring │  │
│  │  298    │ │  142    │ │   23    │ │   8     │ │   12    │  │
│  └─────────┘ └─────────┘ └─────────┘ └─────────┘ └─────────┘  │
│                                                                 │
│  ┌─────────────────────────────┐ ┌─────────────────────────────┐  │
│  │  Recent Leases              │ │  Document Statistics        │  │
│  │  ─────────────────          │ │  ─────────────────          │  │
│  │  LSE-ABC123 | John Doe     │ │  Total: 456                │  │
│  │  LSE-DEF456 | Jane Smith   │ │  Pending Review: 12        │  │
│  │  LSE-GHI789 | Mark Oloo    │ │  Approved: 389             │  │
│  └─────────────────────────────┘ └─────────────────────────────┘  │
│                                                                 │
│  ┌───────────────────────────────────────────────────────────┐  │
│  │  Monthly Trends (6 months)                                  │    │
│  │  ░░░░░ ░░░░░░ ░░░░░░░ ░░░░░░░░ ░░░░░ ░░░░░░░     │      │    │
│  │  Sep     Oct      Nov        Dec         Jan      Feb      │    │
│  └───────────────────────────────────────────────────────────┘  │
└─────────────────────────────────────────────────────────────────┘
```

4. Client Management

Clients (formerly "Landlords") are the property owners who engage Chabrin Agencies for lease management.

4.1 Viewing Clients

Navigate to **Clients** in the sidebar. The list view shows all registered clients with search and filter capabilities.

4.2 Creating a Client

1. Click **New Client**
2. Fill in the required information:

Field Group	Fields
Identity	Names, Second Name, Last Name, Title, Gender
Contact	Mobile Number, Email Address, Address (1, 2, 3)
Tax & ID	VAT Number, PIN Number, National ID, Passport Number
Banking	Bank ID, Account Name, Account Number
Registration	Registered Date, Reference Number, UID
Lease Info	Property ID, Unit ID, Lease Start Date, Lease Years, Rent Amount
Documents	Photo upload, Document attachments

1. Click **Create** to save

4.3 Viewing Client Details

Click on any client row to view their full profile with all associated information.

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5. Property Management

Properties represent the physical buildings or land parcels managed by Chabrin Agencies.

5.1 Viewing Properties

Navigate to **Properties** in the sidebar. The list view provides sortable, searchable columns.

5.2 Creating a Property

1. Click **New Property**
2. Fill in the details:

Field	Description
Property Name	Display name for the property
Reference Number	Unique property reference code
Client ID	The owning client
Zone / Zone Area	Geographic zone assignment
LR Number	Land Registry number
Description	Property description and details
Lat/Long	GPS coordinates
Usage Type	Residential, Commercial, etc.
Acquisition Date	When the property was acquired
Field Officer	Assigned field officer
Zone Supervisor	Assigned zone supervisor
Zone Manager	Assigned zone manager
Bank Account	Linked bank account for rent collection

1. Click **Create** to save

---

6. Unit Management

Units are individual rentable spaces within properties (e.g., apartment rooms, office suites, shop spaces).

6.1 Creating a Unit

1. Navigate to **Units** > **New Unit**
2. Fill in:

Field	Description
Unit Number	Unique identifier within the property
Unit Code	System-wide unique code
Unit Name	Display name
Property ID	Parent property
Client ID	Owning client
Zone	Geographic zone
Unit Type / Category	Classification (studio, 1BR, office, etc.)

Usage Type	Residential or Commercial
Rent Amount	Monthly rent in KES
VAT-able	Whether rent is subject to VAT
Occupancy Status	Vacant, Occupied, Maintenance
Initial Water Meter	Starting water meter reading

1. Click **Create**

---

7. Tenant Management

Tenants are the individuals or entities who occupy rented units.

7.1 Creating a Tenant

1. Navigate to **Tenants** > **New Tenant**
2. Fill in tenant information (same column structure as clients):

Field Group	Fields
Identity	Names, Second Name, Last Name, Title, Gender, National ID, Passport
Contact	Mobile Number, Email Address, Address
Tax	VAT Number, PIN Number
Banking	Bank ID, Account Name, Account Number
Lease Info	Property, Unit, Lease Start Date, Rent Amount, Escalation Rate
Preferences	Preferred Messages Language

1. Click **Create**

---

8. Lease Agreements

Lease Agreements are the core of the system. They track the full lifecycle of a rental contract.

8.1 Lease List View

Navigate to **Lease Agreements** in the sidebar. The badge on the navigation item shows the count of active leases.

Table Columns:

Column	Description
Date Created	When the lease was created
Ref No.	Auto-generated reference (e.g., `LSE-A3BX7KM2NP`)
Lease Ref	Manual lease reference number
Unit Code	The assigned unit code
Tenant	Tenant's full name
Property	Property name
Zone	Assigned zone (badge)
Field Officer	Assigned field officer
Type	Residential (Micro), Residential (Macro), Commercial
Status	Draft, Pending Approval, Approved, Active, etc. (badge)
Rent	Monthly rent in KES

Available Filters:

- Status (multi-select: Draft, Pending, Approved, Active, Terminated, etc.)
- Lease Type (Commercial, Residential Micro/Macro)
- Zone
- Field Officer
- Property
- Client
- Zone Manager
- Date Created range
- Start Date range
- End Date range
- Expiring within 90 days (toggle)

```
Screenshot placeholder: Lease Agreements list
┌─────────────────────────────────────────────────────────────────────┐
│  Lease Agreements                              [ + Create ]         │
│                                                                     │
│  □□Search...                          Filters ▼                    │
│                                                                     │
│  ┌──────────┬─────────────┬───────────┬──────────┬─────────┬──────┐ │
│  │ Ref No.  │ Tenant      │ Property  │ Zone     │ Status  │ Rent │ │
│  ├──────────┼─────────────┼───────────┼──────────┼─────────┼──────┤ │
│  │ LSE-A3BX │ John Doe    │ Sunset Pk │ Zone A   │ Active  │ 45K  │ │
│  │ LSE-K7QM │ Jane Smith  │ Hill View │ Zone B   │ Draft   │ 32K  │ │
│  │ LSE-P2NR │ Mark Oloo   │ River Est │ Zone A   │ Pending │ 28K  │ │
│  │ LSE-W9TY │ Sarah Wanja │ Oak Ridge │ Zone C   │ Active  │ 55K  │ │
│  └──────────┴─────────────┴───────────┴──────────┴─────────┴──────┘ │
│                                                                     │
│  Showing 1-10 of 298                      « 1 2 3 ... 30 »         │
└─────────────────────────────────────────────────────────────────────┘
```

8.2 Creating a Lease

1. Click **Create** from the Lease Agreements list
2. Complete the form:

Lease Details:

Field	Description
Reference Number	Auto-generated (`LSE-XXXXXXXXXX`), read-only
Workflow State	Initial state: Draft, Active, or Terminated
Source	"Chabrin Generated" or "Landlord Provided"
Lease Type	Residential Major, Residential Micro, or Commercial
Template	Optional custom template (filtered by lease type)
Signing Method	**Digital** (email/SMS link) or **Physical** (field officer)

Property & Tenant:

Field	Description
Tenant	Searchable dropdown of registered tenants
Unit	Searchable dropdown — auto-fills rent, property, and client

Financials:

Field	Description
Monthly Rent	Amount in KES (auto-filled from unit)
Deposit Amount	Security deposit in KES

Start Date	Lease commencement date
End Date	Lease expiry date (optional)

Guarantor Section (optional):

Toggle **Requires Guarantor** to add one or more guarantors with:

- Full Name, National ID, Phone, Email
- Relationship (Parent, Spouse, Sibling, Employer, Friend, Other)
- Guarantee Amount (defaults to deposit)
- Signed status and notes

1. Click **Create** to save the lease in Draft state

```
Screenshot placeholder: Create Lease form

┌──────────────────────────────────────────────────────────────┐
│  Create Lease Agreement                                       │
│                                                               │
│  Reference Number: [LSE-A3BX7KM2NP]  (auto-generated)       │
│                                                               │
│  Workflow State:  [ Draft         ▼]                        │
│  Source:          [ Chabrin Generated ▼]                      │
│  Lease Type:      [ Residential Major ▼]                    │
│  Template:        [ Default Template  ▼]                    │
│  Signing Method:  [ Digital Signing   ▼]                    │
│                                                               │
│  ── Property & Tenant ──                                      │
│  Tenant:  [ ▯▯Search tenants...     ▼]                    │
│  Unit:    [ ▯▯Search units...       ▼]                    │
│                                                               │
│  ── Financials ──                                             │
│  Monthly Rent:   [ Ksh 45,000    ]                          │
│  Deposit:        [ Ksh 90,000    ]                          │
│  Start Date:     [ 01/03/2026    ]                          │
│  End Date:       [ 28/02/2028    ]                          │
│                                                               │
│  ☐ Requires Guarantor                                         │
│                                                               │
│                          [ Cancel ] [ Create ]                │
└──────────────────────────────────────────────────────────────┘
```

8.3 Viewing a Lease

Click any lease row (or the eye icon) to open the **View** page. This shows all lease details and provides action buttons in the header.

Header Actions (contextual based on lease state):

Action	Visible When	Description
Edit	Draft or Received	Modify lease details

Request Approval	Draft, no pending approval	Send to client/landlord for review
Approve Lease	Pending Landlord Approval	Approve with optional comments
Reject Lease	Pending Landlord Approval	Reject with reason and comments
Resolve Dispute	Disputed	Resolve a disputed lease
Cancel Disputed	Disputed	Cancel a disputed lease
Send Digital Link	Approved + Digital signing	Email/SMS the signing link to tenant
Print Lease	Approved + Physical signing	Mark as printed for field delivery
Preview PDF	Always	Open PDF preview in new tab
Download PDF	Always	Download the lease as PDF
Send via Email	Tenant has email	Email lease document to tenant
Upload Documents	User can manage leases	Upload scanned physical documents

```
Screenshot placeholder: View Lease page with action buttons
┌──────────────────────────────────────────────────────────────────┐
│  LSE-A3BX7KM2NP                                                 │
│
│
│  [Edit] [Request Approval] [Preview PDF] [Download PDF]          │
│  [Send via Email] [Upload Documents]
│
│
│
│  ┌───────────────────────┐  ┌───────────────────────┐             │
│  │ Lease Details         │  │ Tenant Information   │
│
│  │ ─────────────         │  │ ─────────────────    │
│
│  │ Type: Commercial      │  │ Name: John Doe       │
│
│  │ Status: Draft         │  │ Phone: +254712345678 │
│
│  │ Source: Chabrin       │  │ Email: john@email.com│
│
│  │ Rent: KES 45,000     │  │ ID: 12345678          │             │
│  │ Start: 01/03/2026    │  │                       │             │
│  │ End: 28/02/2028      │  │                       │             │
│  └───────────────────────┘  └───────────────────────┘             │
│
│
│  ┌───────────────────────┐  ┌───────────────────────┐             │
│  │ Property & Unit       │  │ Guarantors           │
│
│  │ ──────────────        │  │ ──────────           │
│
│  │ Property: Sunset Park │  │ No guarantors        │
│
│  │ Unit: 5A              │  │                      │
│
│  │ Zone: Zone A          │  │                      │
│
│  └───────────────────────┘  └───────────────────────┘             │
└──────────────────────────────────────────────────────────────────┘
```

8.4 Lease Workflow States

Leases progress through the following states:

```
┌──────────┐     ┌───────────────────┐     ┌──────────┐
│  DRAFT   │────>│ PENDING LANDLORD  │────>│ APPROVED │
│          │     │    APPROVAL       │     │          │
└──────────┘     └───────────────────┘     └──────────┘
     │                     │                    │
     │                (Rejected)           ┌────┴────┐
     │                     │               │         │
     │                     v            Digital   Physical
     │               ┌──────────┐       Signing   Signing
     │               │  DRAFT   │          │         │
     │               │(revised) │          v         v
     │               └──────────┘     ┌─────────┐ ┌──────────┐
     │                                │  SENT   │ │ PRINTED  │
     │                                │ DIGITAL │ │          │
     │                                └────┬────┘ └──────────┘
     │                                     │           │
     │                                     v           │
     │                              ┌────────────┐    │
     │                              │ PENDING OTP│    │
     │                              └─────┬──────┘    │
     │                                    │           │
     │                                    v           │
     │                             ┌─────────────┐   │
     │                             │   TENANT    │   │
     │                             │   SIGNED    │   │
     │                             └──────┬──────┘   │
     │                                    │          │
     │                                    v          v
     │                             ┌─────────────────┐
     └────────────────────────────>│     ACTIVE      │
                                   └────────┬────────┘
                                            │
                        ┌───────────────────┼────────────┐
                        v                   v            v
                  ┌──────────┐  ┌──────────┐  ┌──────────┐
                  │TERMINATED│  │ EXPIRED  │  │CANCELLED │
                  └──────────┘  └──────────┘  └──────────┘
                        │
                        v
                  ┌──────────┐
                  │ DISPUTED │
                  └──────────┘
```

9. Lease Approval Workflow

9.1 Requesting Approval

1. Open a lease in **Draft** state

2. Click **Request Approval**
3. Confirm the action — an email notification is sent to the client/landlord

9.2 Client/Landlord Approval Portal

Clients can approve or reject leases through:

- **Web Portal** at `/landlord/{landlordId}/approvals`
- **API Endpoints** for programmatic access

The portal shows:

- List of pending, approved, and rejected leases
- Statistics cards (pending count, approved count, rejected count)
- Detailed lease view with property, tenant, rent, and dates

9.3 Approving a Lease (Admin)

From the lease view page:

1. Click **Approve Lease**
2. Optionally add approval comments
3. Click **Approve** — the lease moves to "Approved" state and the tenant is notified

9.4 Rejecting a Lease

1. Click **Reject Lease**
2. Enter a **rejection reason** (required) and optional comments
3. Click **Reject** — the lease returns to "Draft" state for revision

9.5 Approval Tracking Dashboard

Navigate to **Approval Tracking** (`/admin/approval-tracking`) to monitor:

- Pending and overdue approvals
- Landlord approval activity
- Total KES value of pending leases
- Approval timeline

```
Screenshot placeholder: Approval Tracking dashboard
┌──────────────────────────────────────────────────────────────┐
│  Approval Tracking                                           │
│                                                              │
│  ┌──────────┐ ┌──────────┐ ┌──────────┐ ┌──────────┐         │
│  │ Pending  │ │ Approved │ │ Rejected │ │ Overdue  │         │
│  │   23     │ │   156    │ │    8     │ │    3     │         │
│  └──────────┘ └──────────┘ └──────────┘ └──────────┘         │
│                                                              │
│  Landlord Activity                                           │
│  ────────────────                                            │
│  ABC Holdings      -- 5 pending, 12 approved                 │
│  XYZ Properties    -- 2 pending, 8 approved                  │
│  Sunset Investors  -- 1 pending, 15 approved                 │
└──────────────────────────────────────────────────────────────┘
```

---

10. Digital Signing & OTP Verification

10.1 Sending a Digital Signing Link

Once a lease is **Approved** and the signing method is **Digital**:

1. Click **Send Digital Link** from the lease view
2. The system sends an email/SMS to the tenant with a unique signing URL

10.2 Tenant Signing Portal

The tenant receives a link to `/tenant/sign/{lease}`. The signing process is a **3-step wizard**:

Step 1: Verify Identity

- Tenant enters their phone number
- System sends a **4-digit OTP** via SMS
- Tenant enters the OTP within the 10-minute validity window

Step 2: Review Lease

- The full lease document is displayed for review
- Tenant can scroll through all terms and conditions
- A PDF preview is available with print functionality

Step 3: Sign

- Tenant draws their signature on a **digital signature pad**
- Must check consent checkboxes:
- "I have read and understood the lease agreement"
- "I agree to the terms and conditions"
- Click **Submit Signature** to complete

```
Screenshot placeholder: Tenant digital signing portal
┌──────────────────────────────────────────────────────────────┐
│                                                              │
│  ── Step 1 ──  ── Step 2 ──  ── Step 3 ──                    │
│   Verify ID      Review         Sign                         │
│  ──────────    ─────────    ─────────                        │
│                                                              │
│  Verify Your Identity                                        │
│                                                              │
│  Enter the OTP sent to your phone:                           │
│                                                              │
│   ┌────┐ ┌────┐ ┌────┐ ┌────┐                                │
│   │  4 │ │  7 │ │  2 │ │  9 │                                │
│   └────┘ └────┘ └────┘ └────┘                                │
│                                                              │
│  Code expires in: 08:42                                      │
│                                                              │
│              [ Verify OTP ]                                  │
│                                                              │
└──────────────────────────────────────────────────────────────┘
```

```
Screenshot placeholder: Digital signature pad
┌──────────────────────────────────────────────────────────────┐
│  Step 3: Sign the Lease                                      │
│                                                              │
│  Draw your signature below:                                  │
│   ┌────────────────────────────────────────────────┐         │
│   │                                                │         │
│   │           ~~~~ Signature Here ~~~~             │         │
│   │                                                │         │
│   └────────────────────────────────────────────────┘         │
│                                   [ Clear ] [ Undo ]         │
│                                                              │
│  ☑ I have read and understood the lease agreement            │
│  ☑ I agree to the terms and conditions                       │
│                                                              │
│              [ Submit Signature ]                            │
│                                                              │
└──────────────────────────────────────────────────────────────┘
```

10.3 After Signing

Once signed, the tenant sees a **confirmation page** with:

- Lease reference number
- Tenant name, property, unit details
- Rent amount and lease dates
- Signature date and GPS location
- Current lease status
- "What's Next" instructions

11. Document Vault

The **Document Vault** (`/admin/documents`) is a centralized repository for all lease-related documents.

11.1 Document List

The vault table includes:

Column	Description
Title	Document title
Zone	Assigned zone
Property	Associated property
Type	Lease agreement, amendment, ID copy, etc.
Status	Pending Review, Approved, Rejected
Quality	Excellent, Good, Fair, Poor
Size	Human-readable file size
Uploaded By	Name of uploader
Uploaded	Date and relative time
Linked Lease	Associated lease reference (if linked)

Filters:

- Status, Quality, Zone, Source, Document Type
- Unlinked Documents (toggle)
- Quality Issues (toggle)
- My Uploads (toggle)
- Date range

11.2 Uploading Documents

Single Upload:

1. Navigate to **Document Vault** > **Upload**
2. Select Zone and Property
3. Choose Document Type and Year
4. Enter a title and description
5. Upload the file (PDF, DOC, DOCX, JPG, PNG, TIFF — max 25MB)
6. Rate the document quality
7. Click **Create**

Bulk Upload:

Navigate to the **Upload Center** for batch uploading multiple documents at once with drag-and-drop support.

From Lease View:

Use the **Upload Documents** button on any lease to directly attach documents.

11.3 Document Review Queue

Navigate to **Document Vault** > **Review** to see all documents pending review.

Reviewers can:

- **Approve** documents individually or in bulk
- **Reject** documents with reasons
- **Link** approved documents to leases
- **Preview** documents inline (PDF/images displayed in a slide-over panel)

11.4 Document Features

- **Inline Preview** — View PDFs and images directly in the browser via a slide-over modal
- **Version History** — Track all versions of a document with file hashes
- **Audit Trail** — Full log of who viewed, edited, approved, or downloaded each document
- **Integrity Verification** — SHA hash verification for document authenticity
- **Auto-compression** — Uploaded images are automatically compressed to save storage
- **Bulk Link to Lease** — Select multiple approved documents and link them to a lease at once

```
Screenshot placeholder: Document Vault list with preview
┌──────────────────────────────────────────────────────────────────┐
│  Document Vault                     12 pending review            │
│                                                                  │
│  [ All ] [ My Uploads ] [ Upload Center ] [ Review Queue ]       │
│                                                                  │
│  ┌──────────────┬────────┬──────────┬──────────┬──────────────┐  │
│  │ Title        │ Type   │ Status   │ Quality  │ Uploaded     │  │
│  ├──────────────┼────────┼──────────┼──────────┼──────────────┤  │
│  │ Lease - Doe  │ Lease  │ Approved │ Good     │ Feb 15, 2026 │  │
│  │ ID Copy J.S  │ ID     │ Pending  │ Fair     │ Feb 14, 2026 │  │
│  │ Amendment #2 │ Amend. │ Approved │ Excellent│ Feb 12, 2026 │  │
│  └──────────────┴────────┴──────────┴──────────┴──────────────┘  │
│                                                                  │
│                        [ Preview ] [ Download ] [ Link ]         │
└──────────────────────────────────────────────────────────────────┘
```

12. Lease Templates

Lease templates define the layout and content of generated lease agreements.

12.1 Template Types

Template Type	Description
Residential Major	Full residential lease with detailed terms
Residential Micro	Simplified residential lease
Commercial	Commercial/business lease agreement

12.2 Managing Templates

Navigate to **Lease Templates** in the sidebar.

- **List Templates** — View all active and inactive templates
- **Create Template** — Create a new lease template with Blade content
- **Edit Template** — Modify template content and styles
- **Preview** — Live preview of the template as HTML or PDF

12.3 Template Variables

Templates use Blade syntax with variables like:

- `{{ $lease->tenant->names }}` — Tenant name
- `{{ $lease->property->property_name }}` — Property name
- `{{ $lease->monthly_rent }}` — Rent amount
- `{{ $lease->start_date }}` — Lease start date
- `{{ $lease->unit->unit_number }}` — Unit number

12.4 Template Preview

Use the **Preview** page (`/admin/lease-templates/{id}`) to see how a template renders with:

- Raw Blade content view
- Rendered HTML preview
- PDF export preview

---

13. Lawyer Tracking

The system tracks external lawyers involved in lease preparation.

13.1 Managing Lawyers

Navigate to **Lawyers** to:

- Add new lawyers with contact information
- Track which leases are with which lawyer
- Record when leases are sent to and received from lawyers

13.2 Lawyer Workflow

1. **Send to Lawyer** — From the lease view, assign a lease to a lawyer for review
2. **Track Progress** — Monitor the lease's status with the lawyer
3. **Receive from Lawyer** — Record when the reviewed lease is returned

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14. Zone Management

Zones divide Chabrin's property portfolio into geographic areas for management purposes.

14.1 Zone Structure

Each zone has:

- A **Zone Manager** who oversees all properties in the zone
- **Field Officers** who handle on-the-ground lease activities
- Assigned **Properties** and their **Units**

14.2 Zone-Based Access Control

- **Super Admins / System Admins** — See all zones
- **Zone Managers** — See only their assigned zone's data
- **Field Officers** — See only leases assigned to them within their zone

14.3 Zone Dashboard

Navigate to **Zone Dashboard** (or it auto-redirects for zone managers) to see:

- Zone-specific lease statistics
- Field officer performance within the zone
- Lease status breakdown by zone
- Revenue charts filtered by zone

```
Screenshot placeholder: Zone Dashboard
┌──────────────────────────────────────────────────────────────┐
│  Zone A Performance                                           │
│                                                               │
│  ┌──────────┐  ┌──────────┐  ┌──────────┐                   │
│  │ Active   │  │ Pending  │  │ Revenue  │                   │
│  │  67      │  │   12     │  │ KES 3.2M │                   │
│  └──────────┘  └──────────┘  └──────────┘                   │
│                                                               │
│  Field Officer Performance                                    │
│  ─────────────────────────                                    │
│  James Mwangi   -- 23 active leases, 2 pending               │
│  Peter Ochieng  -- 18 active leases, 5 pending               │
│  Mary Akinyi    -- 26 active leases, 5 pending               │
│                                                               │
│  ┌───────────────────────────────────────────────┐          │
│  │  Lease Status Chart                            │          │
│  │  ■ Active: 67  ■ Pending: 12  ■ Draft: 4    │          │
│  └───────────────────────────────────────────────┘          │
└──────────────────────────────────────────────────────────────┘
```

15. Dashboards & Analytics

15.1 Company Dashboard

Access: Super Admin, System Admin

Widgets:

- **Date Range Filter** — Filter all widgets by custom date range
- **Lease Statistics** — Total, active, pending, terminated counts
- **Zone Performance** — Comparison across all zones
- **Lease Status Chart** — Visual breakdown of leases by status
- **Revenue Chart** — Monthly revenue trends

15.2 Zone Dashboard

Access: Super Admin, System Admin, Zone Manager

- Same widgets as Company Dashboard but filtered to a specific zone
- Field officer performance metrics
- Zone-specific lease and revenue data

15.3 Field Officer Dashboard

Access: All staff (scoped to own data for field officers)

- Assigned lease statistics
- Lease status breakdown for assigned leases
- Personal performance metrics

15.4 Document Audit Dashboard

Access: `/admin/document-audit-dashboard`

- Document activity timeline
- Category breakdowns (by type, zone, status)
- Top uploaders
- Upload trends over time

15.5 Permission Dashboard

Access: `/admin/permission-dashboard`

- **Role-Permission Matrix** — Visual grid showing which roles have which permissions
- User counts per role
- Recent role changes audit trail
- Permission delegation tracking

15.6 Print Log Report

Access: `/admin/print-log-report`

- Track all lease printing activity
- Analytics on print frequency and distribution

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16. User & Role Management

16.1 Managing Users

Navigate to **Users** to:

- View all system users
- Create new users with name, email, username, and password
- Assign roles to users
- Block/unblock user accounts

16.2 Roles & Permissions

The system uses **Spatie Permission** with 8 predefined roles:

Role	Key Permissions
Super Admin	Full access to everything
System Admin	All operations except user deletion; manages settings & templates
Property Manager	Full lease lifecycle, landlord lease editing, template management
Asst. Property Manager	Same as PM but cannot manage system settings
Zone Manager	Zone-scoped lease management, field officer oversight
Senior Field Officer	Create/update leases, delivery recording, digital signing
Field Officer	View assigned leases, check-in/out, record delivery/signatures
Audit	Read-only access to all data, reports, and audit logs

16.3 Role Management

Navigate to **Roles** to:

- View all roles and their permission sets
- Create custom roles
- Edit role permissions
- View role details with assigned users

16.4 Permission Categories

Category	Permissions
Leases	View, create, update, delete, print, transition state
Landlord Leases	Edit landlord leases, upload landlord documents
Approvals	Approve, reject, request approval
Digital Signing	Send digital signing, verify OTP
Field Operations	Checkout, check-in, record delivery, physical signatures
Lawyers	Manage lawyers, send to/receive from lawyer
Distribution	Distribute copies
Entity Management	View/manage tenants, landlords, properties, units
Zones	View/manage zones, view zone reports
Users	View/manage users, assign roles
Reports	View reports, audit logs, export reports
System	Manage settings, manage templates

Dashboards	View dashboard, company dashboard, zone dashboard, FO dashboard

17. System Monitoring (Pulse)

17.1 System Pulse Page

Navigate to **System Pulse** (`/admin/system-pulse`) for real-time system health monitoring:

- **Health Checks** — Server status, database connectivity
- **Queue Breakdown** — Pending, processing, failed jobs
- **Database Statistics** — Connection pool, query performance
- **Live Polling** — Auto-refreshes every 30 seconds

17.2 Laravel Pulse Dashboard

Navigate to `/pulse` for the full Laravel Pulse dashboard:

- **Server Stats** — CPU, memory, disk usage
- **SMS Balance** — Africa's Talking SMS credit balance
- **CHIPS Database** — Financial system connection health
- **Usage Metrics** — Active users, request volume
- **Queue Monitor** — Job processing status
- **Slow Queries** — Database performance tracking
- **Exceptions** — Error tracking and frequency
- **Slow Requests** — API/page load performance

17.3 Custom Monitoring Cards

Card	Description
SMS Balance	Real-time Africa's Talking SMS balance with threshold alerts
CHIPS Database	Connection health to the CHIPS financial system with uptime

18. PDF Generation & QR Verification

18.1 Generating Lease PDFs

From any lease view:

- Click **Preview PDF** to view in browser
- Click **Download PDF** to save locally
- Use **Send via Email** to email the PDF to the tenant

18.2 PDF Templates

Three professional PDF templates are available:

1. **Residential Major** — Full-featured residential lease (A4 format)
2. **Residential Micro** — Simplified residential lease
3. **Commercial** — Business/commercial lease agreement

Each PDF includes:

- Company letterhead and branding
- Lease serial number
- QR code for verification
- Party details (landlord/tenant)
- Premises description
- Terms and conditions
- Signature blocks

18.3 QR Code Verification

Every generated lease PDF contains a **QR code** that links to a verification page.

How it works:

1. Anyone can scan the QR code on a printed lease
2. The code links to `/verify/lease?ref=LSE-XXXXXXXXXX`
3. The verification page shows:

- Document authenticity confirmation (or failure)
- Lease serial number
- Cryptographic hash verification
- Security notice

```
Screenshot placeholder: QR verification page
┌─────────────────────────────────────────────────────────────┐
│                                                             │
│  ✓ Document Verified                                        │
│                                                             │
│  This lease agreement is authentic and was generated by     │
│  the Chabrin Lease Management System.                       │
│                                                             │
│  Serial Number: CHA-2026-000142                             │
│  Reference: LSE-A3BX7KM2NP                                  │
│  Hash: a3b7c9e2...                                          │
│                                                             │
│  ⚠ Security Notice: This verification only confirms that    │
│  the document was generated by this system. Always verify   │
│  signatures independently.                                  │
│                                                             │
└─────────────────────────────────────────────────────────────┘
```

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19. Notifications & Email

19.1 Email Notifications

The system sends email notifications for:

Event	Recipient	Description
Approval Requested	Client/Landlord	Lease sent for approval
Lease Approved	Tenant	Lease has been approved
Lease Rejected	Creator	Lease rejected with reason
Digital Signing Link	Tenant	Link to sign the lease online
Lease Document Email	Tenant	Lease PDF sent via email
Rent Escalation (Landlord)	Client	Notification of upcoming rent increase
Rent Escalation (Tenant)	Tenant	Notification of rent increase

19.2 SMS Notifications

Via **Africa's Talking** integration:

- OTP codes for tenant identity verification
- Lease signing reminders
- Custom SMS notifications

19.3 In-App Notifications

Filament's notification system provides toast-style notifications for:

- Successful actions (create, update, approve)
- Error messages
- Warning messages (e.g., missing data)
- Information messages

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20. Keyboard Shortcuts & Tips

20.1 Navigation Tips

- Use the **sidebar** to quickly navigate between sections
- The sidebar **collapses** for more screen space — hover to expand
- Use **global search** (top bar) for instant lease lookup
- **Column toggles** let you show/hide table columns per your preference

20.2 Table Features

- **Sort** — Click any column header to sort
- **Search** — Use the search bar above tables
- **Filter** — Click "Filters" to open the filter panel (supports 3-column layout)
- **Pagination** — Choose 10, 25, or 50 records per page
- **Copy** — Click the copy icon next to reference numbers to copy to clipboard
- **Toggle Columns** — Click the columns icon to show/hide columns

20.3 Productivity Tips

1. **Quick Lease Creation** — Selecting a unit auto-fills rent, property, and client
2. **Bulk Document Actions** — Select multiple documents and approve or link to a lease in one action
3. **Date Range Filtering** — Use the date range widget on dashboards to focus on specific periods
4. **Expiring Leases Toggle** — Use the "Expiring within 90 days" filter to proactively manage renewals
5. **Global Search** — Search across lease references, tenant names, phone numbers, and property names simultaneously

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21. Troubleshooting

21.1 Common Issues

Issue	Solution
Cannot log in	Verify email and password; check if account is blocked
Cannot see leases	Check your role — field officers only see assigned leases
Cannot create leases	Auditors and field officers cannot create leases
Approval button not visible	Lease must be in correct state (Draft or Pending Approval)
PDF preview is blank	Ensure lease has all required fields filled in
OTP not received	Check tenant's phone number; verify SMS balance in Pulse
Document upload fails	Check file size (max 25MB) and accepted types
Zone dashboard shows no data	Ensure your user account has a zone assigned

21.2 Role-Based Access Issues

If you cannot access a feature, verify your role has the required permission:

- **Cannot access Company Dashboard?** — Requires Super Admin or System Admin
- **Cannot manage templates?** — Requires Property Manager or higher
- **Cannot approve documents?** — Requires Super Admin, System Admin, or IT Officer role
- **Cannot delete leases?** — Requires Super Admin, System Admin, or Property Manager

21.3 Getting Help

For technical support:

- Contact your system administrator
- Check the **System Pulse** dashboard for system health status
- Review the **Document Audit Dashboard** for recent activity logs