OWNEROPS ONE

Real Estate Agent

Step-by-step guide

Current instructions for your workspace. Start with the task you need, follow the numbered steps, then check the result.

Revised October 23, 2026 • Revision 2

Start here

Sign in and select the role that fits your work. Begin on Home, choose the relevant property, and review the next action. Use Properties for saved records and Property Intelligence for specialized tools.

Open OwnerOpsOne.com. Features and access depend on your account. Use the live plan screen for current subscription terms.

Silent training

Every training video uses on-screen instructions and contains no audio. Pause or replay any step. Open Help & Tutorials for the matching video collection and role guides.

Find your task

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01. Getting around

Home • Properties • More tools

1. Start at Home. Choose a property, then review What needs attention today?

2. Use Review rent & payment status, Track a repair, or Review all properties & units to act on a task.

3. On desktop use the sidebar and More tools. On mobile use the bottom navigation and Tools or More.

4. Choose the correct property and unit before adding records. Use Get help with this step without leaving your task.

Check: Reopen the relevant screen and confirm the intended property, unit and saved result.

02. Property Intelligence hub

More tools → Property Intelligence

1. Open Property Intelligence to browse tools by category.

2. Choose Financial, Property Records, Landlord or another relevant category.

3. Open the tool that matches the task you are trying to complete.

4. Available tools and access may depend on your account.

Check: Reopen the relevant screen and confirm the intended property, unit and saved result.

03. Track a lead

Property Intelligence > Agent Tools > Lead Tracker

1. Open Lead Tracker and choose Add Lead.

2. Enter Name, Phone, Email and Budget as applicable. Choose Type and Status, then record Source and useful Notes.

3. Review the details and choose Add Lead to save.

4. Find the saved lead in the list. Use its pencil/edit control to update details or status as the conversation progresses.

Check: The saved contact is correct and you have not created a duplicate.

04. County and property records

Property → County records

1. Open a saved property and choose County records.

2. Review available parcel and county information. Coverage varies by location.

3. Follow official record links and compare details with the source. Correct your property record when needed.

4. If lookup is unavailable, keep working with your saved address and retry later. Missing records do not mean the property failed to save.

Check: Reopen the relevant screen and confirm the intended property, unit and saved result.

05. Prepare a property comparison

Property Intelligence > Agent Tools > CMA Workspace

1. Open CMA Workspace for the property being evaluated.

2. Enter the subject-property details requested by the workspace.

3. Review comparable-property information and any generated analysis against its source; correct inaccurate assumptions.

4. Review the report or printable output before sharing it with a client or using it in a decision.

Check: The property, comparison details and assumptions are identified. Generated estimates are not guaranteed sale prices.

06. Schedule and update a showing

Property Intelligence > Agent Tools > Showing Scheduler

1. Open Showing Scheduler and choose Schedule Showing.

2. Select the property when it is available, or enter the property address in the form.

3. Enter Client name and Date & time, then contact details, Duration (min), Status, Showing agent and Notes as applicable. Confirm the time with attendees.

4. Choose Schedule Showing. Return to the saved item and use its edit control when plans change.

Check: A saved showing is an organizer entry; separately confirm that attendees know and accept the appointment.

07. Compare offers

Property Intelligence > Agent Tools > Offer Comparison Tool

1. Open Offer Comparison Tool, enter List price and identify the buyer. Enter Offer price, Earnest $, Financing, Closing cost credits and Closing date from the offer.

2. Choose Add Offer for each additional scenario, up to the displayed limit.

3. Compare the entered price and terms side by side. Check every entry against the actual offer document.

4. Use Print to retain the comparison. Label the output with the property and date.

Check: The comparison matches the source offers. A score does not accept an offer or replace review of its terms.

08. Mortgage and seller financing

Property Intelligence → Financial Tools

1. Choose Mortgage & Investment Calculator or Seller Financing Calculator.

2. Enter the price, financing terms, income and expenses that apply.

3. Review payments, cash flow and any balloon balance using your assumptions.

4. Estimates are scenarios, not lender quotes or guaranteed returns.

Check: Reopen the relevant screen and confirm the intended property, unit and saved result.

09. Closing, refinance and estimates

Property Intelligence → Financial Tools

1. Choose Closing Cost Calculator, Seller Net Sheet or Refinance Calculator.
2. Enter your scenario and review the included costs.
3. Use Property Tax Estimator or Rent Estimator for additional planning estimates.
4. Check assumptions against official records and current quotes.

Check: Reopen the relevant screen and confirm the intended property, unit and saved result.

10. Document tools

Property Intelligence → Documents

1. Use Document Assistant to review an uploaded property document.
2. Use Picture to PDF for a photographed form.
3. Check extracted text, fields and the resulting file before using it.
4. Keep an original copy and review any AI interpretation.

Check: Reopen the relevant screen and confirm the intended property, unit and saved result.

11. Documents and photos

Property → Documents or Photos

1. Open the property before adding supporting files.
2. Use Documents for property paperwork and Photos for images.
3. Review the uploaded file and confirm it belongs to this property.
4. Use clear file names that help you find records later.

Check: Reopen the relevant screen and confirm the intended property, unit and saved result.

12. Professional directories

Property Intelligence → Professionals

1. Choose the directory for the service you need.

2. Search the location for contractors, notaries, attorneys, lenders or inspectors.

3. Verify the provider's contact details and qualifications independently.

4. A directory result is not a booking or endorsement.

Check: Reopen the relevant screen and confirm the intended property, unit and saved result.

13. List for Rent

Property → List for Rent

1. Open List for Rent on a saved property. Check the prefilled details.

2. Choose Generate Listing. Edit the title and description, then complete the accuracy review.

3. Choose Publish Shareable Listing to create an OwnerOps One listing and application link.

4. External rental sites require separate submission. No automatic syndication.

Check: Reopen the relevant screen and confirm the intended property, unit and saved result.

14. Rental-site submission tools

List for Rent → Rental site tools

1. Prepare and review your listing in OwnerOps One.

2. Copy the listing text and use the external rental-site submission links.

3. Complete each rental site's own submission process.

4. Updates and removals in OwnerOps One do not update external sites.

Check: Reopen the relevant screen and confirm the intended property, unit and saved result.

15. Profile, notifications and text size

Profile • Tools

1. Use Profile to review account details and available settings.

2. Review notification settings for the alerts you need.

3. For easier reading, open Tools and choose Large Text.

4. Check the live subscription screen for current plan terms.

Check: Reopen the relevant screen and confirm the intended property, unit and saved result.

16. Help & Tutorials

Get help with this step • Help & Tutorials

1. Choose Get help with this step on your current screen for instructions relevant to your task.

2. Expand Watch the short silent tutorial. Read the on-screen steps; all training videos have no audio.

3. Choose Return to my task to continue. Use Help & Tutorials for role PDFs and the complete video collection.

4. If you still need help, use the support link and describe the screen and problem. Do not include passwords or payment credentials.

Check: Return to your task and continue where you left off.

Keep your work reliable

Before saving

Confirm the property, unit, people, dates and amounts. Review imported or AI-generated information before relying on it.

After saving

Look for confirmation and reopen the record. If an error appears, review it and retry only after checking whether the record or payment already exists.

When you need help

Choose Get help with this step, read the relevant instructions, then Return to my task. For more help, use the support link with the screen name and a short description of what happened.

About this edition

Aligned with the updated app source and training curriculum. These instructions describe workflows; they do not certify a completed live transaction. Screen availability depends on role and account. Public records, AI suggestions and estimates need review.