OWNEROPS ONE

Real Estate Investor

Step-by-step guide

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

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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. 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.

04. 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.

05. Deal analysis and BRRRR

Property Intelligence → Financial Tools

1. Open Property Deal Analyzer or BRRRR & Fix-and-Flip Calculator.

2. Enter purchase, renovation, rent, financing and resale assumptions.

3. Compare the result after changing a major cost or income assumption.

4. A favorable score does not establish that a deal is suitable.

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

06. 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.

07. Mileage and exchange tracking

Property Intelligence → Investor Tools

1. Use Mileage Tracker to log property-related trips.
2. Use 1031 Exchange Assistant to organize the exchange properties and dates.
3. Review your entered dates and records with the appropriate adviser.
4. Tracking tools do not establish tax eligibility or compliance.

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

08. Add your first property

Properties → Add property

1. Open Properties and choose Add property. Enter the street address, city, state and ZIP.

2. Save the property; optional details can wait. If county lookup is pending, continue with the saved property.

3. Review the returned details and photo. Use Edit property details to correct missing or inaccurate information.

4. Follow the setup checklist: add a tenant or mark the rental vacant, then record rent or a repair. Check any unit-creation warning.

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

09. Property overview and units

Properties → Choose a property

1. Open a saved property and review its Overview.

2. Use Edit property details to correct the property's information.

3. For rentals with units, open Units and choose the unit you need.

4. Keep unit records attached to the correct property.

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

10. Portfolio transfer

More tools → Transfer Portfolio

1. Choose a portfolio file upload or the web-link transfer option.

2. Review the extracted records and Portfolio Health Check.

3. Confirm the import, then inspect the created properties and import history.

4. Check for duplicates before importing the same portfolio again.

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

11. 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.

12. Tenants and leases

Tenants & Leases • Property → Tenants

1. Open Tenants & Leases, or the Tenants tab on a property.

2. Check the selected property, unit and tenant before working on a lease.

3. Review the lease and its signature status before treating it as complete.

4. A tenant account and a signed lease are different milestones.

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

13. Property health

Property Health

1. Open Property Health to scan properties and units for items that need attention.

2. Read the reason beside each status. Needs initial inspection or Not rated means evidence is missing.

3. Open a due maintenance item or repair, complete the work, then update its record and check the saved result.

4. Health uses recorded information and due dates. Starter templates alone do not establish condition; a score is not a physical inspection.

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

14. Expenses and receipts

Expenses • Property → Expenses

1. Record an expense against the correct property and unit.

2. For a receipt, use Receipt & Expense Scanner and review the extracted details.

3. Check the merchant, date, amount and category before saving.

4. Keep the original receipt with the expense record.

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

15. Accounting: review and post

Accounting → Review sources

1. Open Accounting and select the property and unit scope.

2. In Review sources, inspect eligible rent and expense records.

3. Check the actual amount, date and accounts before posting a balanced entry.

4. Posting an entry does not move money or change tenant payment status.

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

16. Accounting: bank reconciliation

Accounting → Reconcile

1. Set up the bank account record and its opening statement balance.

2. Import the statement CSV and check each proposed ledger match.

3. Choose Check statement again after edits. Save only when all matches and differences pass.

4. Matching statement rows does not create missing transactions.

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

17. Accounting: reports and workflows

Accounting

1. Use Reports and Performance to review posted accounting information.

2. Use Bills & payables, Vendors and Recurring for their related workflows.

3. Review scope and dates before exporting reports or reviewing access.

4. Reports contain posted entries and opening balances, not every source record.

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

18. Project estimates and redesign

Tools → Property Tools

1. Open Project Estimator for an itemized project estimate.
2. Use Redesign Studio to upload a room photo and explore recommendations.
3. Review quantities, materials and proposed work before acting.
4. Design suggestions and estimates are planning aids.

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

19. 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.

20. 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.

21. 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.

22. 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.