

Property Manager & Team Operational Manual

A Complete Guide to Property Management, Scoping, Leases, Invoicing, Work Orders, and Multi-Module Operations.

Target Audience:	Property Managers, Caretakers, Accountants, Admins
Organization:	Legend Management Limited / Center Estates Ecosystem
Version:	2026.1 Enterprise Release
System URL:	https://centerestates.com & https://centerestates.com/app
API Base:	https://api.centerestates.com

Important Note for New Users:

Center Estates employs strict role-based and property-level isolation. When your account is first created, you will belong to your organization (e.g. **Legend Management Limited**) with your assigned role (e.g. **Property Manager**). If you have not yet been assigned specific properties, your property dropdown will be empty until your administrator assigns your assigned buildings.

1. System Overview & Navigation

Center Estates is a unified Enterprise Real Estate ERP that centralizes property management, facility operations, construction monitoring, tenders, sales, and valuations into a single high-performance platform.

1.1 Signing In and Authentication

- **Login URL:** Visit <https://centerestates.com/login>.
- **Credentials:** Enter your assigned username or email address and password.
- **Session Security:** Sessions are securely signed with JWT tokens and refreshed automatically.

1.2 The Module Switcher (Blue Left Rail)

Inside any active module, a sleek **Blue Icon Rail** is displayed permanently on the left side of your desktop display. This rail allows instantaneous 1-click switching between all operational departments you have permission to access:

Module	Icon	Key Workflows
Property Management	Building	Units, Leases, Rent Invoicing, Utility Readings, Arrears, Bank Rec
Facility Management	Wrench / Tool	Maintenance tickets, Work orders, Preventative inspections, Assets
Sales Management	HandCoins	Off-plan unit reservations, Buyer portals, Commissions, Installments
Tender Management	Scale	Bid pipelines, Gate evaluations, Compliance scoring, Bid submissions
Valuations	ClipboardCheck	Valuation instructions, Site inspections, Comparables, Signed PDF reports
Construction Monitoring	HardHat	Daily site logs, GPS photo timelines, S-curves, Bill of Quantities (BoQs)

1.3 Property Context & Switching Modal

Each property in Center Estates operates in its own isolated ledger. When switching modules or clicking the Property Icon on the rail, a dialog prompts you whether to continue on the current property or switch to another assigned estate. You can check **'Don't ask me again'** to retain your chosen property context seamlessly.

2. Property Management Master Workflows

As a Property Manager, your primary day-to-day responsibilities center around property readiness, unit leasing, billing, and cash flow reconciliation.

2.1 Managing Units & Readiness Statuses

Every property is subdivided into individual rentable or saleable units (e.g., Suite 4B, Apartment 102). Units maintain a real-time lifecycle status: Vacant Ready, Occupied, Maintenance Required, or Reserved. A unit cannot be leased out until its readiness checklist is certified by the manager.

2.2 Tenant Onboarding & Leases

1. **Register Tenant:** Navigate to Tenants & Leases -> Add Tenant. Enter legal name, national ID/passport, phone number, and KRA PIN.
2. **Create Lease Agreement:** Select the vacant unit, set the lease commencement date, tenure (e.g. 1 year / 2 years), base monthly rent, and service charge.

3. **Security Deposits:** Enter agreed deposit amounts (typically 1 or 2 months' rent plus water meter deposit). Deposits are held in escrow.
4. **Lease Execution:** Upload signed PDF contracts directly to the Tenant Documents tab for audit readiness.

2.3 Utility Readings & Monthly Invoicing

Center Estates automates recurring monthly rent and utility billing:

- **Water Meter Readings:** At the end of each billing cycle, input the current meter reading in the Utility Billing tab. The system computes exact consumption, applies statutory unit tariffs, and flags meter variances.
- **Consolidated Invoices:** Click *Generate Monthly Invoices*. The ERP bundles Base Rent, Service Charge, Water Consumption, and Garbage/Parking into a single PDF tax invoice emailed directly to the tenant.

2.4 Rent Collection, Receipts & Bank Reconciliation

When a tenant pays via M-Pesa Paybill, RTGS, or Direct Bank Transfer:

- **Recording Receipts:** Go to Receipts -> Record Payment. Enter the amount paid, payment method, reference (e.g. M-Pesa transaction code), and allocate against outstanding invoices.
- **FIFO Allocation:** The system automatically applies payments to the oldest arrears first unless specific invoices are selected.
- **Bank Reconciliation:** Upload bank statement CSV files to perform automated 3-way matching between bank credits and ledger receipts.

3. Scoping, Roles & Access Control

Center Estates enforces strict multi-tenant boundaries to safeguard confidential financial records between organizations and estates.

Role Name	Scope & Permissions
Platform Administrator	Full access across all organizations, system settings, audit logs, and global user management.
Organization Admin	Manages organization-wide settings, user memberships, role assignments, and property creation.
Property Manager	Full operational control over assigned properties: unit leases, billing, maintenance, and tenant communications.
Property Accountant	Focuses on invoices, receipts, payment reversals, statement generation, and bank reconciliations.
Facility Manager / Technician	Resolves maintenance work orders, equipment inspections, asset tags, and space utilization.
Caretaker / Site Clerk	Records daily site logs, logs water meter readings, inspects vacant units, and raises site tickets.

3.1 Why a New Property Manager Sees 0 Properties

By design, when a new user (such as **Bryan**) is added as a Property Manager in **Legend Management Limited**, their assigned_properties list is initially empty. This guarantees that managers only see financial data and tenants for estates they have been formally assigned to oversee.

3.2 How Administrators Assign Properties

1. Log in as an Organization Administrator (or Platform Admin).
2. Navigate to **Settings -> Team & Memberships**.
3. Locate the user (e.g. Bryan) and click **Edit Assignments**.
4. Check the desired properties (e.g. *BLUESHIELD TOWERS*, *Litch House*) and click **Save**.
5. The assigned properties will immediately appear in the user's Property Selector dropdown upon next navigation.

4. Frequently Asked Questions (FAQs)

Q: Where can I find documentation on the live system?

A: You can visit the public documentation portal at <https://centerestates.com/docs>. It features module walkthroughs, technical guides, and direct PDF downloads.

Q: What should I do if my property selector shows 'No properties found'?

A: Check with your Organization Administrator to verify that your account has been assigned to at least one active property under Team & Memberships.

Q: Can I access the system on my tablet or mobile phone?

A: Yes. Center Estates is built with responsive mobile layouts. On smaller screens, the navigation collapses into an intuitive touch-friendly slide-over drawer.

Q: How do I export financial statements or tenant rosters?

A: Every data grid (Tenants, Invoices, Receipts, Units) includes an 'Export' button supporting both instant Excel (.xlsx) and printable PDF formats.

Q: How are water bills calculated for sectional title properties?

A: The system supports both sub-metered individual units and bulk meter shared apportionments based on unit square footage (unit factor).

Technical Support & Inquiries

Email: support@centerestates.com | Web: <https://centerestates.com>

Legend Management Limited — Operations Office, Nairobi, Kenya.