PROPERTY MANAGEMENT · LEASE ADMINISTRATION OPERATIONS

Lease creation and renewal management

Automatically creates new leases and manages lease renewals by checking tenant history, generating lease documents, and coordinating approvals. Reduces manual paperwork and ensures timely lease processing across property portfolios.

01 WORKFLOW TRIGGER

Lease expiration date approaches within 90 days or new tenant application is approved

BLUEPRINT OVERVIEW

What this workflow accomplishes

This workflow ties lease expiration tracking in AppFolio or Buildium to tenant ledger and compliance data in Yardi, Rent Manager, TenantCloud, and Propertyware, then produces and routes the lease document for signature. Automation handles date detection, ledger pulls, document assembly, signature chasing, and record updates. Property managers keep authority over renewal offers, rent increase amounts, non-renewal notices, and any lease term that departs from the standard template.

01

OUTPUTS

Executed lease agreement, Updated tenant record, Rent collection schedule set, Renewal calendar updated

02

SUCCESS MEASURES

Days to process lease, Renewal acceptance rate, Signature completion rate, Notices sent on time

03

CORE SYSTEMS

AppFolio, Buildium, Yardi, Rent Manager, TenantCloud, Propertyware

HOW TO USE THIS BLUEPRINT

Property managers: set the rent increase bands and delinquency thresholds the eligibility rules read, and sign off on every non-renewal before notice goes out.

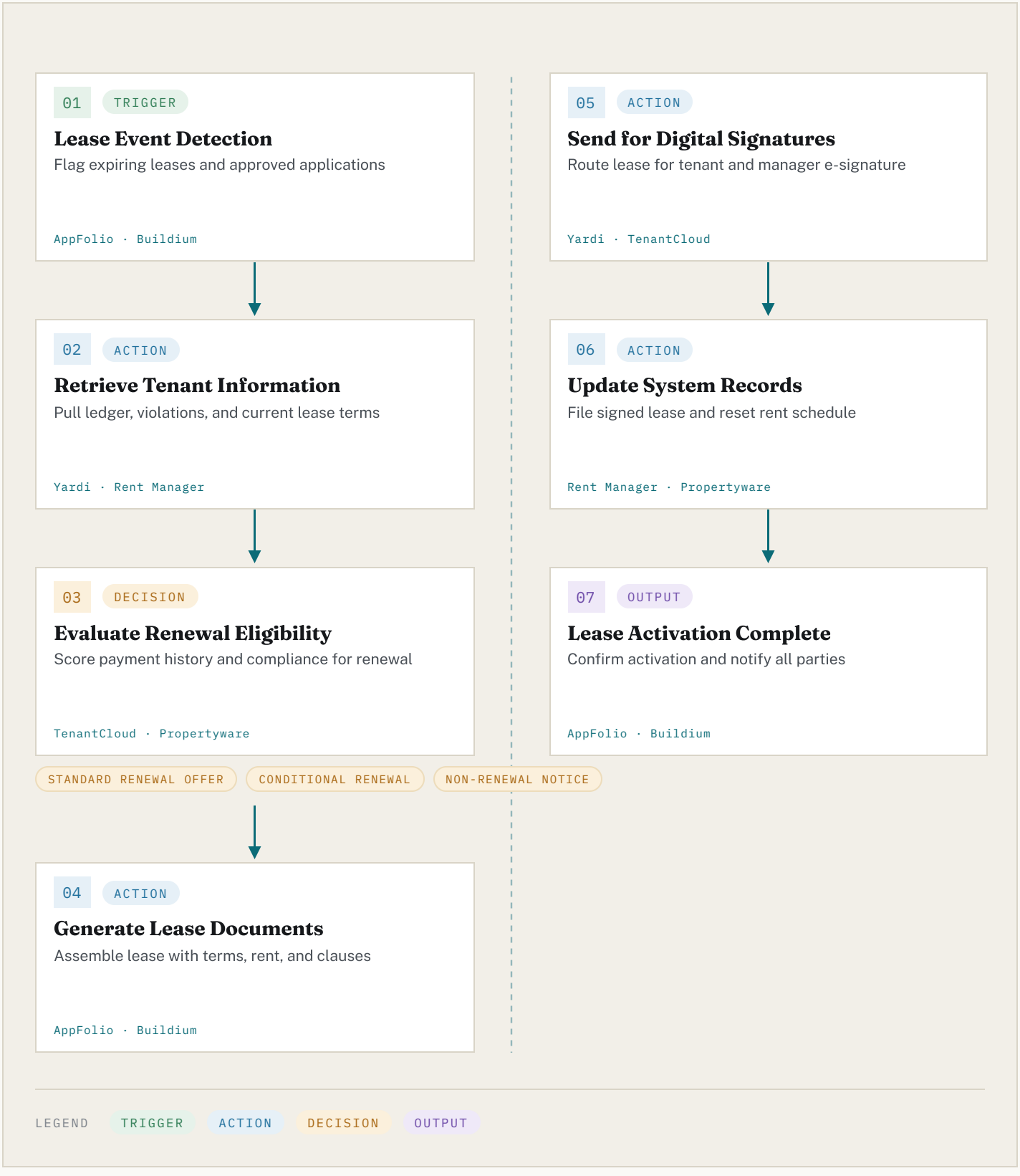
Leasing and admin staff: work the signature tracker daily, confirm the executed lease is filed against the correct unit, and clear any document that stalls past 5 days.

Implementers: map ledger fields, violation codes, and clause libraries between the property management system and the document generator before turning the trigger on.

THE WORKFLOW

End-to-end stage map

Seven stages carry a lease from the 90 day expiration flag or approved application through to activation. The decision at stage 3 governs whether a tenant is offered renewal, offered renewal on conditions, or issued a non-renewal.



IMPLEMENTATION DETAIL

Stage-by-stage breakdown

Each stage states the operational intent, the human control point, and the systems likely to take part. System names are examples, not a required architecture.

01 TRIGGER

Lease Event Detection

System detects approaching lease expiration or newly approved tenant application. Triggers workflow to begin lease creation or renewal process.

CONTROL POINT

The property manager reviews the weekly expiration queue and can suppress or defer any unit under renovation, litigation, or planned sale.

SYSTEMS AppFolio Buildium

02 ACTION

Retrieve Tenant Information

Pulls tenant payment history, violation records, and current lease terms from property management system. Compiles comprehensive tenant profile for decision making.

CONTROL POINT

Leasing staff verify the ledger pull against the tenant file and correct misapplied payments or open credits before eligibility is scored.

SYSTEMS Yardi Rent Manager

03 DECISION

Evaluate Renewal Eligibility

Analyzes tenant payment history and lease compliance to determine if tenant qualifies for renewal. Routes to appropriate lease action based on tenant standing.

CONTROL POINT

Human control: the property manager approves the route and the offered rent; any non-renewal requires owner or regional manager sign-off.

SYSTEMS TenantCloud Propertyware

04 ACTION

Generate Lease Documents

Automatically creates lease agreement with updated terms, rent amounts, and property-specific clauses. Populates all tenant and property details from system records.

CONTROL POINT

The property manager reads the generated lease and initials the rent, term length, and any property-specific addenda before it leaves the system.

SYSTEMS AppFolio Buildium

COMPLETION AND MEASUREMENT

Closing stages and results

The closing stages record the executed lease, reopen the rent collection schedule, and preserve the signature and notice trail for each unit.

05 ACTION

Send for Digital Signatures

Delivers lease documents to tenant and property manager for electronic signature. Tracks signature status and sends reminders for incomplete documents.

CONTROL POINT

Leasing staff monitor signature status and decide when to call the tenant, extend the offer window, or withdraw the document.

SYSTEMS Yardi TenantCloud

06 ACTION

Update System Records

Records signed lease in property management system and updates tenant portal access. Schedules rent collection and maintenance coordination for new lease term.

CONTROL POINT

The bookkeeper confirms the new rent amount, due date, and any concession posted correctly to the tenant ledger before activation.

SYSTEMS Rent Manager Propertyware

07 OUTPUT

Lease Activation Complete

Confirms lease is fully executed and all systems are updated. Sends confirmation notifications to all parties and activates new lease terms.

CONTROL POINT

The property manager signs off on the activation summary and owner notification, and can hold notices until move-in or key handoff is set.

SYSTEMS AppFolio Buildium

DELIVERABLES

- Executed lease agreement
- Updated tenant record
- Rent collection schedule set
- Renewal calendar updated

KEY METRICS

- Days to process lease
- Renewal acceptance rate
- Signature completion rate
- Notices sent on time

IMPLEMENTATION CHECKS

- Correct state notice periods per property
- Rent increase caps enforced in template
- Signature audit trail retained
- Portal access tied to signed lease
- Role permissions on rent overrides

NEXT STEP

Turn this blueprint into an implementation plan.

Map each stage to your own systems, permissions, and approval routing before selecting tools or building automation.

packfoundry.app/assessment

PROPERTY MANAGEMENT WORKFLOW PACKS AND A FREE ASSESSMENT