

Kinxso EstateIQ

Property, tenancy and rent management for agencies and landlords.

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Contents

1. [Getting started](#)
2. [Properties, units and owners](#)
3. [Leases and tenants](#)
4. [Rent, invoices and owner payouts](#)
5. [Maintenance, enquiries and deals](#)
6. [Reports and troubleshooting](#)

1. Getting started

What EstateIQ manages

EstateIQ holds the four things a property business runs on, and keeps them connected:

- **Properties** - the buildings and units you manage
- **Owners** - whoever the rent ultimately belongs to
- **Leases** - who is renting what, for how long, at what rent
- **Money** - rent due, rent collected, expenses, and what you pass on to owners

Because they are connected, recording a rent receipt updates the tenant's balance, the owner's payout and your reports at once. That is the point: the same figure is never typed twice.

Order of setup

Do these in order. Each step depends on the one before it.

1. **Agency details** - your name, contact details and branding. These appear on invoices and tenancy agreements.

1. **Users** - your team, each with the role that matches their job.

2. **Owners** - the landlords whose property you manage. If you own the property yourself, you are

still the owner; create a record for yourself.

1. **Properties and units** - the buildings, then the units inside them.

2. **Leases** - only once a property and a tenant exist.

Creating a lease first is the usual mistake and means going back to fill in the property anyway.

Users and roles

Add colleagues under **Users**. Give each person the narrowest role that lets them work: someone collecting rent does not need to change owner payout rules.

Multiple agencies

If you run more than one business, or manage separate portfolios that must not mix, **Agencies** keeps them apart. Each agency has its own properties, leases and reports, and you switch between them rather than filtering one long list.

Use this for genuinely separate businesses, not for branches of the same one - separating data you later want to report on together is harder to undo than to avoid.

2. Properties, units and owners

Properties and units

A **property** is the building or the house. A **unit** is a lettable space inside it - a flat, a shop, a floor. A single house is still a property; it simply has one unit.

Add a property under **Properties**, then add its units. For each unit record the type, the size, and the rent you expect. The expected rent is what new leases default to, so keeping it current saves typing and catches mistakes.

Owners

Owners are whoever the rent belongs to after your fee. Record their contact details, their bank details for payouts, and any agreement terms.

Ownership can be recorded at two levels:

- **Property level** - the whole building or house belongs to one owner, or to several owners

sharing it. This is the common case.

- **Unit level** - individual units are owned separately, as in a strata or apartment block where

each flat has its own owner.

Unit-level ownership overrides the property's. If a unit has no owner of its own, the property's ownership applies, so a whole building with one owner only needs recording once.

Record ownership before you collect rent. Payouts are calculated from it, and rent collected against a unit nobody owns has nowhere to go.

Co-owned property

Where several people share a property, record each with their share. Payouts split along those shares automatically, so you never calculate percentages by hand at the end of the month.

Keeping the record honest

Mark units as occupied, vacant or under maintenance as reality changes. Occupancy reporting is only as good as this, and a unit left marked occupied after a tenant leaves quietly overstates both your occupancy rate and your expected income.

3. Leases and tenants

Creating a lease

Leases - New. A lease ties a tenant to a unit for a period, at a rent.

You will need:

- The **unit** being let
- The **tenant** and their contact details
- **Start and end dates**
- The **rent** and how often it is due
- The **deposit** held
- Any **escalation** - a scheduled increase during the term

The start date must come before the end date, and rent and deposit cannot be negative. The system refuses these rather than storing a tenancy that cannot be true.

Generating the agreement

Once the lease exists you can produce the tenancy agreement from it, so the document and the record say the same thing. Re-typing an agreement separately is how a signed paper ends up disagreeing with the system about the rent.

What a lease drives

An active lease is what makes everything else happen:

- Rent becomes due on schedule
- The unit shows as occupied
- The owner's payout is calculated from rent collected on it
- Arrears are measured against it

This is why a lease should be created when the tenancy starts, not when the first payment arrives.

Renewing

When a term is ending, renew rather than editing the dates on the old lease. A renewal keeps the history of what was agreed and when, which matters in a dispute. Editing the original quietly rewrites the past.

Ending a lease

Use **Terminate** on the lease. Record the end date and settle the deposit - returned in full, partly withheld for damage or arrears, or withheld entirely. Terminating properly is what frees the unit for the next tenancy and stops rent continuing to fall due.

Simply letting a lease run past its end date leaves the unit occupied in your reports and keeps raising rent nobody owes.

4. Rent, invoices and owner payouts

Rent due and collected

Rent shows what is due across your portfolio and what has been collected. Record each receipt against the lease it pays, not as a loose payment: that is what clears the tenant's balance, feeds the owner's payout and keeps arrears honest.

Record part payments as they arrive. The balance stays outstanding and keeps appearing until it is paid, which is exactly what you want.

Invoices

Invoices covers anything billed beyond scheduled rent - a service charge, a repair recharged to a tenant, an agency fee. Issue it, then record the payment against it when it arrives.

Installments

Where an amount is agreed to be paid in stages - a deposit by instalments, arrears being cleared over months - **Installments** tracks the schedule and what remains, so a plan does not live in somebody's memory.

Expenses

Expenses records money spent on a property: repairs, utilities, service costs. Attach each to the property it belongs to.

This matters more than it looks. An expense recorded against a property reduces the owner's payout correctly and appears in their statement, so when they ask why this month is lower, the answer is already there with the invoice attached.

Owner payouts

Rent collected belongs to the owner, less your fee and any expenses. **Owner payments** calculates this and records what you have paid out.

Payouts follow the ownership you recorded: unit-level where it exists, otherwise the property's, and split by share where a property is co-owned.

The habit that keeps this right: record rent against leases, expenses against properties, and pay out what the system calculates rather than a figure worked out separately. The moment those two diverge, every owner statement becomes an argument.

Chasing arrears

Arrears are simply rent due that has not been received. Work from the rent screen rather than memory, and record every payment as it lands - a tenant chased for rent they already paid is a relationship you do not get back.

5. Maintenance, enquiries and deals

Maintenance

Maintenance tracks repair requests from report to completion. Record what was reported, which property and unit it concerns, who is dealing with it, and what it cost.

Keep it updated as work progresses rather than only at the end. A tenant asking "has anyone looked at my boiler" should get an answer from the system, not a phone call to a colleague.

Costs recorded here flow through to the property's expenses, so the owner's statement reflects the work without anyone re-entering the figure.

Enquiries

Enquiries holds people who have shown interest - a viewing request, a call about a listing. Record them even when nothing comes of it: a pattern of enquiries on a unit that never convert tells you something about the asking rent.

Demands

Demands is the other side: what people are looking for. A requirement recorded here can be matched against properties as they become available, instead of relying on whoever took the call to remember.

Deals

Deals tracks a transaction in progress - a sale or a letting being negotiated. Record the stage it has reached, the parties, and the value. This is what lets you see what is actually in the pipeline rather than what people think is in it.

Agents and commission

Agents holds the people doing the deals, and commission is tracked against what they close. The commission report shows what is owed and what has been paid, so payment conversations start from the same figures on both sides.

6. Reports and troubleshooting

Reports

Report	Answers
Properties	What you manage, and how much of it is occupied
Tenants	Who is renting what, and what they owe
Owner payments	What each owner is due and what has been paid
Expenses	What is being spent, by property
Commissions	What agents have earned and what is outstanding

The accounting section carries the standard statements - trial balance, profit and loss, balance sheet, cash flow and the ledger - for when you need the financial position rather than the operational one.

Troubleshooting

"An owner's payout looks too low." Check the expenses recorded against that property for the period. Expenses reduce the payout, which is correct, and the statement will show them. If the expenses are right, check the ownership shares on the property.

"Rent is still showing as due after the tenant paid." The receipt was probably recorded without being matched to the lease. Find the payment and attach it.

"A unit shows occupied but the tenant left." The lease was never terminated. Terminate it with the correct end date; the unit frees up and rent stops falling due.

"Occupancy looks wrong." Occupancy is calculated from unit status and active leases. A unit left marked occupied, or a lease past its end date that was never terminated, will both overstate it.

"A lease will not save." The start date must be before the end date, and rent and deposit cannot be negative. The form refuses a tenancy that could not be true rather than storing it.

"Rent is not being raised for a property." There is no active lease on the unit, or the lease has passed its end date. Rent is driven by leases, not by the unit.

"I cannot find a payout for a unit." The unit has no owner, and the property has no ownership either, so there is nobody to pay. Record ownership at property level if the whole building belongs to one owner.

Getting help

Note the property, unit and lease reference and what you expected to see. Most questions about a figure are answered by looking at what is recorded against the lease it came from.