

How to Maximize Your Value from STRATAFOLIO

As a property manager or owner, you face endless tasks while juggling huge amounts of information. Using disconnected systems like spreadsheets or QuickBooks alone isn't enough for growing commercial real estate businesses. STRATAFOLIO offers a solution by centralizing, automating, and streamlining commercial real estate operations. This guide covers practical steps to maximize value from STRATAFOLIO and overcome common property management challenges.

Automate Workflows



Organize Data



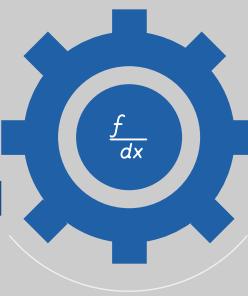
Optimize Performance

Use STRATAFOLIO to its best effect for your business.

Improve Reporting



Leverage Alerts



Ultimate Checklist of Ways to Increase Value from STRATAFOLIO

Simplify Invoicing and Collections

- Use the "Create All Invoices" option to automate billing and save time.
- Train multiple staff members on invoicing processes.

Streamline Payments with ACH

- Enable ACH payments in STRATAFOLIO.
- Inform tenants of the ACH option and encourage autopay.

Stay on Top of Leases

- Input all lease terms into STRATAFOLIO, including escalations.
- Activate notifications for important lease dates.

Use Debt Tracking Tools

- Use STRATAFOLIO dashboards to view financial data at the property and portfolio level.

Improve Investor Transparency

- Grant investors portal access.
- Produce clear investor reports.

Enhance Tenant Experience

- Encourage tenants to submit work orders in the portal.
- Use the document sharing feature for clarity on leases, COIs, and more.



Ultimate Checklist of Ways to Increase Value from STRATAFOLIO, Continued

Simplify Common Area Maintenance Reconciliation

- Set up CAM allocations in STRATAFOLIO.
- Check CAM reports throughout the year.
- Promptly send tenant reports and CAM charge breakdowns.

Manage Work Orders & Insurance Compliance

- Set up alerts for expired/unfulfilled COIs.
- Have tenants upload COIs directly to the portal.





Simplify Invoicing & Collections

The Problem

Missed rent escalations reduce revenue. Creating and managing invoices manually takes hours. Payment tracking is often inaccurate, and if a staff member is out, invoicing stops completely.

STRATAFOLIO's Solution

Quickly generate invoices for your entire portfolio. Track what tenants owe vs. what they've paid. The intuitive interface allows any employee to handle invoicing, keeping everything on schedule.

Action Steps

- Set up tenant leases with escalation terms to leverage automations
- Use "Create All Invoices" option at the start of each billing cycle
- Train multiple staff members on invoicing processes

Streamline Payments with ACH

The Problem

Most commercial tenants prefer making rent payments online with ACH, but many landlords don't offer this option. Third-party platform fees are often high, and payments take too long to process, resulting in delayed income and cash flow tracking difficulties.



STRATAFOLIO's Solution

STRATAFOLIO offers ACH payments with low fees and automatic posting, eliminating manual entry. Tenants can use autopay to make payments on time, every time, while QuickBooks sync ensures accuracy across your books.

Action Steps

- Enable ACH payments in STRATAFOLIO for all tenants
- Make tenants aware of the service
- Encourage tenants to set up autopay to reduce missed payments

Stay on Top of Leases



The Problem

When managed by hand, lease tracking is prone to errors, disorganization, or even forgetfulness. With information scattered across multiple spreadsheets, there's no easy way to see when leases are about to escalate, start, or end, leaving you in trouble from missed revenue or sudden low occupancy rates.

STRATAFOLIO's Solution

STRATAFOLIO stores leases in one convenient location. Built to handle complex commercial leases, it helps you with important tasks like CAM reconciliation. Alerts ahead of all lease escalations help you meet key dates and deadlines.

Action Steps

- Upload leases directly into STRATAFOLIO for easy tracking
- Enable alerts for important dates like escalations.
- Have tenants upload supplementary documents like COIs directly into the portal to ensure compliance

- With proper lease tracking, you'll never miss critical milestones or misplace lease terms, keeping you prepared for growth.



Use Debt Tracking Tools

The Problem

Like handling leases, debt tracking is difficult to manage manually. This is especially true for large commercial real estate businesses with multiple properties and complex investment setups. If your data isn't stored carefully, when you need to calculate crucial metrics like loan to value (LTV) and debt service coverage ratio (DSCR), you risk using the wrong data and coming up with incorrect answers.

STRATAFOLIO's Solution

Centralized debt tracking for each property provides real-time metrics for LTV, DSCR and more across your portfolio. Plus, two-way integration with QuickBooks keeps data accurate and up-to-date.

Action Steps

- Input all debt information into STRATAFOLIO for tracking
- Use STRATAFOLIO dashboards to regularly review important performance metrics at both the property and portfolio level



Improve Investor Transparency



The Problem

Commercial property investors want frequent updates to monitor asset performance. Creating investor reports manually takes time and risks errors, which can erode investor's trust in your business.

STRATAFOLIO's Solution

Investor portals allow 24/7 access. Share relevant metrics like NOI and cash-on-cash returns. Detailed reports provide exactly the information investors need.

Action Steps

- Grant investors access with appropriate role distinctions
- Regularly update portfolio data for accurate analysis
- Create accurate, in-depth investor reports



Enhance Tenant Experience

The Problem

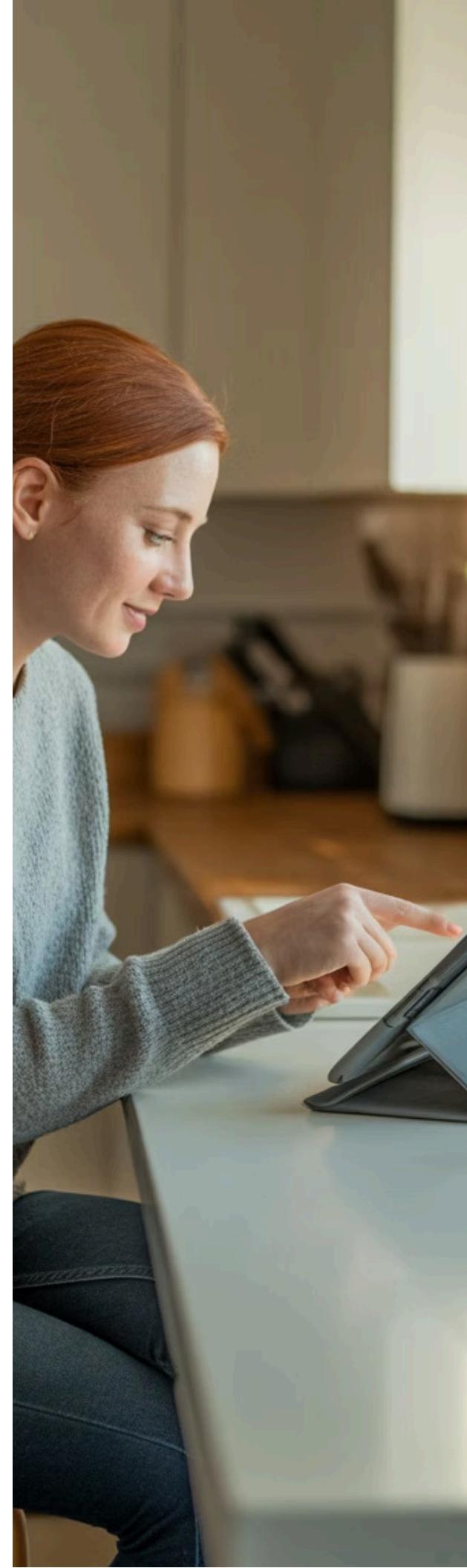
Without a dedicated system, tenants struggle to communicate effectively with property managers and submit payments. Third-party payment systems can be slow with high fees. Tracking important compliance information and repair requests becomes difficult, straining tenant relationships.

STRATAFOLIO's Solution

Tenants can submit ACH payments directly through the tenant portal with lower fees. The portal allows work order submission with photos and documents. Both parties can access important documents and lease information in one place.

Action Steps

- Ensure tenants know how to use the portal
- Encourage work order feature usage for faster responses
- Use document sharing for clear communication of lease requirements



Simplify Common Area Maintenance Reconciliation

The Problem

Year-end common area maintenance (CAM) reconciliation is a complicated, tedious process prone to errors. Tenants often don't understand or trust CAM charges, leading to strained relations and extra verification work.



STRATAFOLIO's Solution

Automatic, 1-click CAM reconciliation reports are fast and accurate. Real-time data allows checking CAM status throughout the year. Generated reports are clear and easy for tenants to understand, with two-way QuickBooks integration eliminating double-entry.

Action Steps

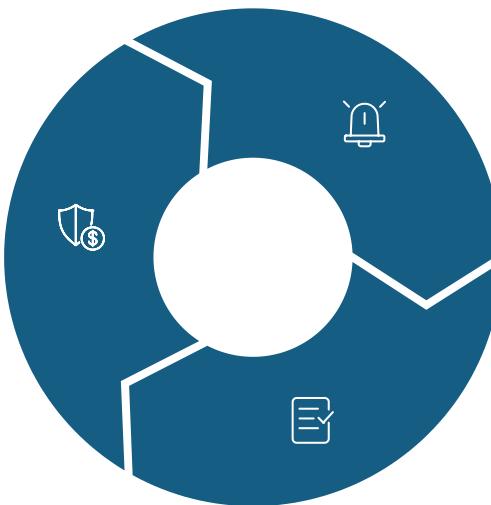
- Set up CAM allocations in STRATAFOLIO for each property
- Check CAM reports throughout the year to monitor progress
- Send tenant reports promptly after reconciliation with complete charge breakdowns



Manage Work Orders & Insurance Compliance

The Problem

Tracking certificates of insurance (COIs) manually is risky. Different terms, requirements, and expiration dates are difficult to monitor. Missed expirations expose both parties to liability. Work orders scattered across emails and spreadsheets cause delays and confusion.



STRATAFOLIO's Solution

Centralized work order management through a tenant portal. Automated alerts for COI expirations or unmet conditions. Tenants can upload COIs directly to the portal for easy tracking.

Action Steps

- Use automated alerts to stay aware of COI conditions
- Require tenants to upload COIs directly into STRATAFOLIO
- Log all maintenance and repairs through the work order system

- By centralizing these critical functions, you reduce liability risks while improving tenant satisfaction through faster maintenance response times.

Take Full Advantage of STRATAFOLIO's Tools Today

STRATAFOLIO isn't just software, it's a complete operating system for effective, modern real estate management.

Using STRATAFOLIO's full set of tools saves you time, improves tenant and investor relationships, and reduces the likelihood of mistakes. Whether you're a new user or already familiar with the system, now is the time to evaluate if your workflows maximize value from STRATAFOLIO's resources.

- ⓘ To optimize your STRATAFOLIO setup and ensure you're getting the most from the platform, schedule a free 1:1 demo with our team today.

