Lofty Works

A paradigm in property management software.
Combining the best in UK property management and financial expertise with Marketing and CRM know-how from the US.

Find out
more about
our features

1. Marketing

	Residential	Commercial
Prepare marketing listing details and information for a property	✔	
Publish property to Rightmove and Zoopla (requires portal account)	✔	
Manage published status of properties on portals	✔	
Post a property listing to Facebook and X	✔	✔
Upload unlimited images, videos and floor plans for properties	✔	✔
Manage image display order and rotate images	✔	✔
Assign a property to geographic area	✔	✔
Email property details to a prospect	✔	✔

2. CRM

	Residential	Commercial
Create and manage contact types: Leads, Applicant, Tenants, Landlords, Agent, Supplier and Other	✔	✔
Synchronise contact emails with shared and personal emails from Outlook or Google Mail	✔	✔
Synchronise contact calendars with shared and personal accounts for Outlook or Google Calendar	✔	✔
Email a questionnaire to Leads to qualify requirements	✔	✔
Add property matches to a Lead record	✔	✔
Schedule a viewing	✔	✔
Manage Lead Pipeline	✔	✔
Manage pre-tenancy checks/referencing and upload reports against leads	✔	✔
Send to a contact company specific stationery such as emails and letters	✔	✔
Connect with Docusign, send contracts for digital signing (requires Docusign account)	✔	✔

3. Property Management

3.1 Property

	Residential	Commercial
Create a workspace for each financial reporting business unit/office	✔	✔
Add, Edit and Manage properties for residential and commercial property types	✔	✔
Assign property managers to properties	✔	✔
Assign one or more landlords to a property	✔	✔
Group properties by parent property, used to manage commercial units, HMOs, business parks etc	✔	✔
Centralise data by property: property details, events, documents, communications, financials, audit logs	✔	✔

3.2 Contracts

	Residential	Commercial
Add, Edit, Manage ASTs, License and Non-AST contract types	✔	
Add, Edit, Manage Commercial Leases and Ground Rents		✔
Manage contracts by status	✔	✔
Archive completed contracts	✔	✔
Specify rent period; Weekly, Daily, Monthly, Quarterly, English Quarters, Annual		✔
Add break clauses and break clause notification periods	✔	✔
Specify invoice requirements for contract; auto invoice, no-invoice, manage only	✔	✔
Add or exclude VAT on rental invoice		✔
Add internal contract notes	✔	✔
Configure alerts using customisable automations	✔	✔

	Residential	Commercial
3.3 Documents		
Attach property documents to a property covering all residential and commercial document types	✔	✔
Specify when documents expire, set reminders and alerts such as GSC, EPC or EICR	✔	✔
Receive email alerts and entries into the calendar when a property document is expiring	✔	✔
Customise reminders in days before document expiry	✔	✔
Share documents with tenants and/or landlords via the Portal	✔	✔
Show documents expiring on dashboard	✔	✔
3.4 Problems, Tasks, Works Orders		
Capture and manage property problem reports received via email, phone or tenant portal	✔	✔
Attach images related to the property problem	✔	✔
Provide tenants with a guidance doc for property problem	✔	✔
Manage and progress Tasks via customisable stages	✔	✔
Manage, View, Drag & Drop tasks by Task Board, view by Task List	✔	✔
Filter Tasks by property, task type, assignee	✔	✔
Create tasks by type and assign to team members and suppliers	✔	✔
Add quick notes to Tasks and Works Orders with time stamps and timeline to make keeping track easy	✔	✔
Convert a Task into a Works Order	✔	✔
Attach PDFs and other document types to a Task or Works Order	✔	✔
Attach images to a Task or Works Order	✔	✔
Attach documents, invoices and bills to Tasks or Works Orders	✔	✔
Configure custom checklists for Tasks to ensure all steps are completed correctly and consistently	✔	✔
Set task completion date and reminders	✔	✔
PDF a Works Order	✔	✔
Add internal notes to a property	✔	✔
Assign managers to a property	✔	✔
Track status of Tasks and Works Orders	✔	✔
Request landlord approve a Works Order and mark as approved	✔	✔
Archive completed tasks	✔	✔
Report Tasks by property or type of task	✔	✔
Synchronise Task and Work Order dates with Outlook	✔	✔
Synchronise Task and Work Order dates with Google Calendar	✔	✔
Report Tasks by property as output pdf or spreadsheet	✔	✔
3.5 Tenancy Management		
Manage pre-tenancy process from applicant, referencing, contract signing to move-in and move-out	✔	✔
Register and manage deposits	✔	
Manage AST contracts that become Periodic	✔	
Apply document templates for emails and letters. Use for welcome letters, arrears letters and more	✔	✔

4. Communications

	Residential	Commercial
Unified inbox for all comms for team and personal communications; email, chat and whatsapp	✔	✔
Synchronise with Microsoft Outlook or Google Mail. Up to 5 accounts	✔	✔
Built-in secure chat to message between staff, suppliers, tenants and landlords	✔	✔
Whatsapp integration for direct messaging using Whatsapp Business account	✔	✔
Link emails and messages to a property or contact. Keep all your information organized in one place	✔	✔
Message alerts sent to email if not read online	✔	✔
Invite tenants, suppliers, landlords to join messaging and portal system	✔	✔
Mark communications as resolved and closed to aid productivity and workflow	✔	✔

5. Finance

5.1 Rent Collection

	Residential	Commercial
Connect to Xero, invoices auto generate directly in Xero, as single source of truth	✔	✔
Invoice automatically up to 30 days in advance	✔	✔
Optionally send rent invoice by email	✔	✔
Create branded invoice or rent demand templates and emails using Xero stationery templates	✔	✔
Include or exclude VAT on rent amounts	✔	✔
Property reference matches between LoftyWorks and Xero	✔	✔
Post to rent ledger code or specify custom ledger costs for each property	✔	✔
First months invoice pro-rata	✔	✔
First months invoice collect rent, deposit and other fees	✔	✔
Auto rent demand generation at 00:00 each night	✔	✔
Arrears reporting and bulk chasing or late payments by email	✔	✔

5.2 Agent Client Account Accounting

	Residential	Commercial
Configure and operate a client account to receive rents in and manage payouts	✔	✔
Automated and bulk processing of payouts to landlords and vendors	✔	✔
Fast and easy bank reconciliation daily using Xero banking integrations	✔	✔
Generate landlord statements using templates	✔	✔
Select items to be included in monthly payouts to landlord and tenant reserves	✔	✔
Manage floats	✔	✔
Report daily client account cash allocation report	✔	✔
Payout to landlords same day / next day based on funds received	✔	✔
Payout to landlords by portfolio or by individual property	✔	✔
Bulk processing of payouts using payment processing built-in to Xero	✔	✔
Deduct management fees (see below)	✔	✔
Support multiple client account bank accounts (synchronise to Xero)	✔	✔
NRL reporting	✔	✔

5.3 Management Fees

	Residential	Commercial
Charge fees on percentage or Rent, percentage collected, fixed fees	✔	✔
Charge VAT on management fees	✔	✔
Generate fees as rent is due or paid, reconcile payments against bills to ensure full collection	✔	✔

	Residential	Commercial
5.4 Deposit Management		
Manage deposits through the entire lifecycle with a dedicated pipeline	✔	
Record registered deposits by agents preferred scheme - custodial or insured	✔	
Manage the return of deposits to tenants, including deposits held in dispute	✔	
5.5 Reporting		
Rent report summarises all rents to be collected by due date	✔	✔
Tenancy report summarises all key contract information, including expiry	✔	✔
Property balances report, summarises income and expenses at a property level	✔	✔
Cash allocation report, used for Client Account bank accounts, provides allocation of cash	✔	
NRL summary report for landlords	✔	
From Xero all built-in reports available	✔	✔

6. Dashboard

	Residential	Commercial
Select and configure KPI widgets to display on dashboard page	✔	✔
Widgets update in realtime and report information on tasks, property, documents, finance and more	✔	✔

7. Portal

	Residential	Commercial
Tenants provided with a secure login to access property information, contracts and key documents	✔	✔
Landlords provided with a secure login to access property information, statements and key documents	✔	✔
Secure messaging with tenants and landlords using portal	✔	✔
Report property problems using portal	✔	✔

8. Other Features

	Residential	Commercial
To the minute backup of workspace data	✔	✔
Assistance with data migration and setup available	✔	✔
Staff training packages	✔	✔
API for integration to analytics and reporting tools	✔	✔

Raising Property Management to New Heights