

Tenant Forms

Accurate forms, clauses, and checklists are essential to keeping every transaction organized, compliant, and moving forward. Administrators play an important role in ensuring the correct documents are prepared, completed, submitted, and tracked at the right stage of the deal.

The Team Playbook includes dedicated sections for listing, buyer, landlord, and tenant transactions, along with forms and clause resources, templates, checklists, and standard procedures. Use these resources as a reference when preparing a file, confirming requirements, or supporting an agent through a transaction.

When in doubt, refer to the appropriate Team Playbook section and confirm the next step before proceeding.

SESSION 3 • FORMS, CLAUSES AND COMPLIANCE

Landlord & Tenant Services Tools



Key forms, templates, and screening tools that support better service

1

Templates in SkySlope

- ✓ Templates are set up in SkySlope
- ✓ Similar to listing and buyer templates
- ✓ Helps keep paperwork organized and consistent

2

Landlord Side

- ✓ Prepare the right forms and clauses
- ✓ Support listing setup and compliance
- ✓ Use screening tools to add value for landlords

3

Tenant Representative Side

- ✓ Prepare tenant forms and required documents
- ✓ Help keep the process organized and clear
- ✓ Use screening tools where appropriate

4

Tenant Screening Tools

- ✓ Use SingleKey or PropTx Verify
- ✓ Helpful for both landlord and tenant rep sides
- ✓ Supports stronger screening and better service

Admin Takeaway: Use the right templates and tenant screening tools to deliver organized, compliant, value-added service for both landlords and tenants.

BETTER TOOLS CREATE A BETTER RENTAL EXPERIENCE.

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