rentvine™

AI Cookbook

Practical, copy-paste recipes for running your portfolio in plain English — with any AI assistant, on the data you already have.

No API · No integration · No IT ticket

Bring your own data.
Five recipes, one afternoon.

The Menu

Five recipes, chosen because every property manager runs these plays — whatever software sits underneath. Each one takes a report you can already export, and turns it into an answer you can act on before lunch.

None of them require a Rentvine account, an API key, or an integration. If you can export a spreadsheet, save a PDF, or copy a table off your screen, you can run every recipe in this book today.

Also inside

Before you start

You need two things: an AI assistant that accepts file uploads, and a report you can export. That's the whole setup. There is nothing to install and nothing to configure.

1 · Pick your assistant

Any general-purpose AI assistant that lets you attach files will run these recipes — Claude, ChatGPT, Gemini, or whatever your company has approved. Look for one that handles spreadsheets and PDFs, not just text, and that gives you a business or team plan with a data-privacy commitment in writing.

2 · Get your data out

Every property management system exports. Find the report you already run — rent roll, aged receivables, work order list — and export it as **CSV or Excel** if you can. PDF works too, and so does pasting a table straight into the chat window. CSV is simply the cleanest: no merged cells, no page headers repeating every 40 rows, no logos to read around.

3 · Know what's safe

These recipes only ever *read*. Nothing here posts a charge, sends an email, or touches a ledger — the AI produces a table, a brief, or a draft, and every one of them sits in your chat window until you do something with it. The reminder emails in Recipe 02 are written for you and sent by you.

> ⚠ **Two minutes of housekeeping before you upload anything.** These files contain tenant names, addresses, and balances. Check your company's policy on where that data is allowed to go, and confirm your assistant's plan doesn't train on your inputs — most business tiers don't by default, but verify it for yours. When in doubt, delete the contact columns before uploading. Unit number and first name are enough for every recipe in this book.

> **The one caveat worth repeating.** Nothing in this cookbook depends on Rentvine, on Rentvine's API, or on any integration at all. Every recipe was written to run on a plain export from whatever system you use today — Rentvine, AppFolio, Buildium, Yardi, Propertyware, ResMan, RentManager, or a spreadsheet you maintain by hand. Report names and column headers differ by system, so the recipes name *the data they need* rather than the report that produces it. Page 17 shows what changes when an assistant is wired directly into your system — but that's an upgrade, not a prerequisite.

Every recipe follows the same shape

What to bring (the export and the columns that matter) · **the prompt** (copy it, edit the bracketed parts, paste it) · **how the AI gets there** (so you can trust but verify) · **variations** · and **tips** learned from real runs.

How it works

A five-minute mental model that makes every recipe easier to adapt.

The shape of property management data

Owner → Property → Unit → Lease. Every system in this industry models the same spine, under different names. Owners hold properties; properties are physical addresses; units are the rentable spaces inside them; leases carry tenants, terms, rent, and balances. Everything operational hangs off that spine — work orders on a property or unit, notices and renewals on a lease, charges and payments on a ledger.

This is why joining exports works at all. Your rent roll and your work order list came out of different menus, but both of them name a property and a unit — and that's the key the AI uses to line them up.

What the AI is actually good at here

- **Reconciling messy columns.** "Bal Due," "Balance," "Amount Owed," and "Outstanding" are the same field in four systems. You don't have to rename anything.
- **Joining files a spreadsheet won't.** Matching "118 Maple St Apt 2" to "118 Maple St - #2" across two exports is a VLOOKUP that fails and an AI that doesn't.
- **Date and money math.** Days open, days until expiration, aging buckets, totals, percentages — instantly, and consistently every time you run it.
- **Ranking by consequence.** This is the part no report gives you. A $2,300 balance on a lease with ten months left is a different problem than the same balance on a lease expiring in six weeks. Sorting by amount is a spreadsheet; sorting by what to do first is not.
- **Writing the thing you'd have written.** The reminder, the owner update, the renewal offer — in your voice, one per tenant, in seconds.

And what it isn't

It isn't a system of record and it can't see anything you didn't give it. If your export is three days old, its answer is three days old. If a column is missing, it will either tell you or — the failure mode to watch for — quietly work around it. Ask for its assumptions and spot-check a few rows against your software, especially the first couple of runs. Confidence comes from verification, not from tone.

> **Trust, but verify.** On any recipe you plan to run repeatedly, spend five minutes the first time checking three lines against the real record. Once you know a recipe is sound, you're just re-running it — and that's where the hours come back.

What to bring

Four exports power all five recipes. You almost certainly run three of them already — they just have different names in your system. Bring what you have; every recipe degrades gracefully when a file is missing.

The export	Also called	Columns that matter
Rent roll	Active leases, tenant directory, occupancy report	Property address · unit · tenant name · rent amount · lease start · lease end · balance
Aged receivables	Delinquency, AR aging, tenant balances, outstanding charges	Tenant · unit · total due · charge type · charge date or aging bucket
Work order list	Maintenance, service requests, open tickets	Property · unit · description · status · date opened · assigned vendor · cost
Unit list	Property/unit roster, availability, vacancy report	Property address · unit · beds/baths · market rent · status

> **The one that trips people up.** A rent roll usually shows *occupied* units only. Vacancy is what's missing from it — so Recipe 04 needs a full unit list, or the AI is subtracting from a list it can't see. If your system won't export all units at once, export by property and upload several files; the AI will stack them.

Three habits that make exports work

- **Say when you pulled it.** Exports rarely carry a date and every recipe does date math. One line — *"exported today, March 4"* — anchors everything.
- **Keep the header row.** Delete the report title and the logo band above it if you like, but leave the column names intact. That's the AI's map.
- **Don't pre-filter.** It's tempting to trim to "just the ones I care about." Upload the whole thing and let the prompt do the filtering — you'll catch what you weren't looking for.

No export at all?

Select the table on screen, copy, and paste it into the chat. It works better than it has any right to. Screenshots work too, though numbers should be spot-checked. A PDF of the report you already email to owners is a perfectly good input.

Prompting tips that apply everywhere

- **Name your files in the prompt.** "The first file is my rent roll, the second is open work orders" removes all guessing. The AI will figure it out on its own, but telling it costs you four seconds and buys you certainty.
- **Give it today's date.** "Next 90 days" needs an anchor, and your export doesn't have one. Every recipe in this book that mentions a timeframe is quietly relying on this.
- **Say how to join the files.** "Match records across the files by address and unit" is the single most useful sentence in this cookbook. Where addresses are formatted differently between exports, say so, and ask it to show you any rows it couldn't match.
- **Ask for the plan first.** Add *"tell me how you're going to approach this before you do it"* when trying something new. You'll see the logic before any numbers appear — and catch a bad assumption in ten seconds instead of after the fact.
- **Ask it to flag gaps, not fill them.** *"If a column I'd need is missing, tell me instead of estimating."* This one sentence prevents the most common failure mode in this whole book.
- **Lock the format once.** End with *"format this the same way every time so I can compare week to week."* Trends jump out when the layout doesn't move.
- **Ask for the reasoning on anything ranked.** "Sort by what I should handle first, and tell me why for each" turns a list into a decision you can argue with.
- **Iterate — don't restart.** The second prompt is where the value is. "Now just the ones over $1,000," "now group by owner," "now write the emails." You're in a conversation, not a search box.
- **Big portfolios: ask for the top slice.** "Top 20 by amount, plus totals for everything else" beats a 500-row dump you won't read.

> **Save the ones that work.** Once a prompt earns its keep, paste it into a note or a shared doc your team can reach. Within a month you'll have a small internal playbook — and the recipes will read like *your* business, not a book's.

01 Morning portfolio triage

A FIVE-MINUTE WIN

5 MIN

Start the day with a single prompt that surfaces what actually needs attention: money outstanding, maintenance in flight, and leases running out of runway.

WHO IT'S FOR

Property managers and ops leads doing a daily or weekly sweep.

WHAT YOU'LL GET

A prioritized brief with amounts, addresses, and the three things to do first.

WHAT YOU NEED

A rent roll. Work orders and receivables if you have them.

WHAT TO BRING

- **Rent roll** — address, unit, tenant, rent, lease end date, balance
- **Open work orders** — property, description, status, date opened
- **Aged receivables** (optional — the rent roll's balance column covers most of it)

THE PROMPT — COPY, EDIT THE [BRACKETS], PASTE

Attached are exports from my property management system: a [rent roll], [open work orders], and [aged receivables]. All pulled today, [date].

Give me a morning triage of my portfolio:

1. Leases with a balance due — top 10 by amount, with tenant name and address
2. Open work orders, grouped by status, flagging anything older than [14] days
3. Leases ending in the next [60] days

Match records across the files by address and unit. If a column you'd need is missing, tell me instead of estimating.

Keep it tight — amounts, addresses, dates. End with the three things I'd handle first today, and why those three.

WHAT COMES BACK ILLUSTRATIVE — YOUR DATA, YOUR NUMBERS

BALANCES DUE — TOP 3

118 Maple St · Apt 2 — M. Alvarez 32 days	$2,340
742 Birchwood Dr — T. Okafor 18 days	$1,875
51 Harbor Ln · Unit C — P. Sharma 6 days	$1,150

WORK ORDERS

14 open · 3 older than 14 days — oldest: water heater @ 907 Fernwood, open 23 days, awaiting estimate

START HERE TODAY

1. **Call M. Alvarez** — largest balance, and their lease is one of two expiring without a renewal started
2. **Chase the water-heater estimate** — 23 days open is past your SLA
3. **Kick off the 3 Crescent Ct renewal** — ends in 41 days

HOW THE AI GETS THERE

Step	What happens	Why it matters
1	Reads and normalizes	Maps your column names to what it needs, and standardizes dates and dollar formats across files that don't agree with each other
2	Joins on address + unit	The one key present in nearly every export — and the reason three separate reports become one picture
3	Ages and sorts	Days open, days to expiration, dollars outstanding — computed from today's date, not a stale column
4	Ranks by consequence	The part a report can't do: weighing a large balance against a near-term expiration and telling you which one to touch first

Nothing is written anywhere. The output is a brief in your chat window — read it, act on it, close the tab.

VARIATIONS

- **Scope it down:** *"...for the [Lakeview] properties only"* — one line, and the whole brief narrows.
- **Change the cadence:** *"Weekly version — also include new applications and any inspections completed this week."*
- **Make it a habit:** end with *"format this the same way every time so I can compare day to day."*
- **Turn a finding into action:** follow up with *"draft the email to the vendor about item #2"* — the brief becomes the to-do list becomes the sent mail.
- **No files handy?** Paste the tables straight into the chat, or upload a PDF of the report. Both work.

TIPS

- Start with one file. A rent roll alone gets you most of this brief — add the other exports once the shape is right.
- Column names genuinely don't matter. What does matter: header rows repeating mid-file, and merged cells from a PDF export. CSV avoids both.
- "Older than 14 days" works because work orders carry a created date. Set the threshold to your actual SLA and it becomes a real exception report.
- Status names are yours. If your system calls it "Assigned / In Progress / Awaiting Parts," say so once and the grouping will use your language.
- The three-things-to-do ending is the whole recipe. A list of everything is a report; three ranked items with reasons is a morning.
- Run it before your first coffee, not after your first phone call. The value is in setting the agenda rather than reacting to one.

02 Delinquency review

15 MIN

A MULTI-STEP WORKFLOW

The month-start collections sweep, done in one prompt: who owes what, how it breaks down, how old it is — and ready-to-send reminder drafts, written for you and sent by you.

WHO IT'S FOR

Anyone running collections at the start of the month, or any time balances pile up.

WHAT YOU'LL GET

An aged, itemized delinquency table plus a personalized reminder per tenant.

WHAT YOU NEED

An aged receivables export and a way to reach tenants.

WHAT TO BRING

- **Aged receivables** — tenant, unit, amount due, charge type, and either charge dates or aging buckets
- **Tenant contact list** (or just first names — enough to personalize a draft)
- **Last month's receivables export** (optional, and the secret ingredient — see step 4)
- **Your late fee policy** (optional — paste the text right into the chat)

THE PROMPT — COPY, EDIT THE [BRACKETS], PASTE

Attached is my [aged receivables report] and [tenant contact list], exported today, [date]. I've also attached [last month's receivables report].

Run my delinquency review:

1. Every tenant with an overdue balance, and the exact amount due
2. Itemize each one — rent vs. late fees vs. everything else — and note the date of the oldest unpaid charge
3. Group into 0–30, 31–60, and 61+ days past due, with a subtotal per bucket
4. Flag anyone whose balance **grew** since last month's report

Give me one table sorted by amount owed, largest first: tenant, address, total due, breakdown, oldest unpaid charge, days late.

Then draft a [friendly but firm] payment reminder for each tenant — personalized with their name and exact balance, asking for payment by [the 5th], signed from [your name, your company]. I'll review and send them myself.

WHAT COMES BACK — ILLUSTRATIVE — YOUR DATA, YOUR NUMBERS

118 Maple St · Apt 2 — M. Alvarez · rent $1,940 + late fees $400 · oldest charge Feb 1 · 61+ days	$2,340
742 Birchwood Dr — T. Okafor · rent only · oldest charge Mar 1 · 31–60 days · grew $625	$1,875

Buckets — 0–30: $3,180 (6 tenants) · 31–60: $4,290 (3) · 61+: $2,340 (1) · **Total $9,810**

DRAFT 1 OF 10 — M. ALVAREZ

"Hi Maria — quick note that the balance on Apt 2 is now $2,340: March and April rent plus two late fees. Could you get that to us by the 5th? If something's going on, call me. — Dana, Riverside PM"

HOW THE AI GETS THERE

Step	What happens	Why it matters
1	Separates the charges	Rent, late fees, utilities, and one-off charges tell different stories — and "you owe $1,840" lands very differently once it's itemized
2	Ages from the charge date	Buckets computed from today, so the aging is current even if your report's buckets aren't
3	Compares to last month	Distinguishes a balance that's shrinking from one that's compounding — the same dollar figure, two different phone calls
4	Writes one draft per tenant	Same voice, correct name, correct number, every time — the part that used to eat an afternoon

> **The AI drafts. You send.** Nothing leaves the chat window. No email goes out, no charge is posted, no ledger is touched. Every reminder sits in the conversation until you copy it into your own email or tenant portal — which means you read every word before a tenant does.

VARIATIONS

- **Escalate by bucket:** *"Make the 0–30 drafts warm, the 31–60 drafts direct, and the 61+ drafts formal with a reference to the lease terms."*
- **Chronic vs. one-time:** attach the last three months and ask *"who's late every single month, and who just slipped once?"* — two lists that deserve two entirely different conversations.
- **Late-fee cross-check:** paste your policy and add *"flag any account that looks like it's missing a fee it should have."*
- **Second language:** *"Give me each draft in English and Spanish."*
- **Export it:** *"Give me the table as raw markdown"* — pastes cleanly into a team wiki or the ops thread.

TIPS

- Run it after rent posts *and* after your grace period ends, so balances reflect this month rather than last month's noise.
- Set the voice once — *"warm, first person, no legalese, short"* — and it carries through every message consistently.
- Strip contact columns if your policy calls for it. First name and unit is enough to personalize a draft.
- The oldest-unpaid-charge date changes more conversations than the total does. Keep it in the table.
- Read three drafts before you send thirty. Once the voice is right, it stays right.

03 Lease renewal pipeline

10 MIN

A MULTI-STEP WORKFLOW

Quarterly renewal planning in one pass: every lease expiring in your window, where each one stands, and the context you need to price the offer — before the tenant starts packing.

WHO IT'S FOR

Property managers and portfolio leads planning the next renewal cycle.

WHAT YOU'LL GET

A pipeline sorted by urgency, with red flags surfaced before offers go out.

WHAT YOU NEED

A rent roll with lease end dates. That's genuinely it.

WHAT TO BRING

- **Rent roll** — address, unit, tenant, current rent, lease end date, balance
- **Aged receivables** (optional — only if your rent roll has no balance column)
- **Market comps** (optional — three to five, pasted as text, for the pricing variation)

THE PROMPT — COPY, EDIT THE [BRACKETS], PASTE

Attached is my rent roll, exported today, [date].

Build me a lease renewal pipeline for the next [90] days:

1. Every lease expiring in that window — address, unit, tenant, current rent, end date
2. Sort by end date, soonest first, with a "days until expiration" column
3. Flag any tenant carrying an outstanding balance — I want to know that before we send an offer
4. Flag any lease that's already month-to-month; treat blank end dates as month-to-month
5. A summary line: total units expiring, total monthly rent expiring, and what percentage of my portfolio that represents

End with two short lists: the renewals I should start **this week**, and the ones that need a conversation instead of an offer.

WHAT COMES BACK — ILLUSTRATIVE — YOUR DATA, YOUR NUMBERS

EXPIRING IN THE NEXT 90 DAYS — 23 LEASES

3 Crescent Ct — D. Whitfield · ends Aug 27 · 15 days	$2,150/mo
118 Maple St · Apt 2 — M. Alvarez · ends Sep 04 · 23 days · owes $2,340	$1,940/mo
66 Sandpiper Way — K. Osei · month-to-month since Jan	$2,395/mo

$41,730/mo in rent expires this quarter — 8.4% of the portfolio. 17 already have a renewal in motion.

START THIS WEEK (4) · CONVERSATION, NOT AN OFFER (2)

3 Crescent Ct, 907 Fernwood Ave B, 51 Harbor Ln C, 12 Alder St · 118 Maple St Apt 2 (balance), 66 Sandpiper Way (holdover since January)

HOW THE AI GETS THERE

Step	What happens	Why it matters
1	**Filters by date window**	Counted from today, which is why the prompt tells it today's date — an export won't
2	**Computes exposure**	Rent expiring as a dollar figure and as a share of the portfolio: the number leadership actually asks for
3	**Cross-checks balances**	The step teams skip by hand — and the one that stops a renewal offer going to someone two months behind
4	**Splits offers from conversations**	A clean renewal and a difficult one need different first moves. Separating them is the judgment worth asking for

Pure read. Nothing is scheduled, sent, or recorded — you get a pipeline you can work from.

VARIATIONS

- **See the wave coming:** *"Three columns: expiring in 0–30, 31–60, and 61–90 days"* — the seasonal shape jumps out immediately.
- **Price the offer:** paste three to five market comps and add *"suggest a renewal rent for each unit, with your reasoning."* You'll disagree with some — that's the point, it's a starting position, not a decision.
- **By owner:** *"Break it out by owner, with expiring rent subtotaled for each"* — the exact slice owners ask about.
- **Chase the holdovers:** *"List only month-to-month leases, oldest first."* Quiet revenue risk, hiding in plain sight.
- **Draft the offers:** *"Now write the renewal offer letter for each of the first ten, at their current rent plus [3]%."*

TIPS

- Run it at the start of each quarter and again mid-quarter. The second pass catches the renewals that stalled after the offer went out.
- Tell it today's date. This recipe is date math end to end, and the export has no idea when it was pulled.
- Blank end dates are ambiguous — they can mean month-to-month or a data gap. Say which one you mean, or ask it to list them separately.
- Add *"format this identically to last quarter so I can compare"* and the quarter-over-quarter read costs you nothing.
- Percentage of portfolio expiring is the sentence that gets an owner's attention. It's one line in the prompt and it does a lot of work.
- Pair it with Recipe 04 — renewals tell you what *might* go vacant; the vacancy board tells you what already has.

04 Vacancy snapshot

10 MIN

A MULTI-STEP WORKFLOW

"What's vacant right now, and what's about to be?" is the question behind every marketing dollar and every awkward owner call. One prompt answers it — with a dollar figure attached.

WHO IT'S FOR

Property managers and leasing coordinators keeping units filled.

WHAT YOU'LL GET

An availability board: vacant now, vacating soon, and rent sitting empty.

WHAT YOU NEED

A full unit list plus a rent roll — both, not either.

WHAT TO BRING

- **Unit list** — *every* unit, occupied or not, with beds/baths and market rent
- **Rent roll** — so the AI can tell which of those units currently have an active lease
- **Notices / scheduled move-outs** (or a rent roll with a move-out date column)
- **Leasing inquiries or applications** (optional — unit, source, date)

THE PROMPT — COPY, EDIT THE [BRACKETS], PASTE

Attached: my [full unit list], my [rent roll], and [my leasing inquiries], all exported today, [date].

Build me an availability board. Match on address and unit.

1. **Vacant now** — every unit in the unit list with no active lease in the rent roll. Include address, beds/baths, market rent, and the date the last lease ended, so I can see how long it's been sitting
2. **Vacating soon** — leases with a notice given or a move-out scheduled in the next [45] days, with the expected move-out date
3. **Prospect interest** — for each unit above, any inquiries, with source and date. Dedupe by name and email

One table per section. Flag any vacant unit with zero inquiries — that's my marketing gap. Finish with total monthly rent sitting empty right now.

WHAT COMES BACK — ILLUSTRATIVE — YOUR DATA, YOUR NUMBERS

VACANT NOW — 6 UNITS

907 Fernwood Ave · B — 2/1 · empty since Jan 14 · **210 days** · **0 inquiries**	**$1,780/mo**
51 Harbor Ln · Unit A — 1/1 · empty since Jul 02 · 41 days · 7 inquiries	**$1,395/mo**

VACATING SOON — 4 UNITS IN THE NEXT 45 DAYS

3 Crescent Ct — notice given Aug 02 · moving out Aug 31	**$2,150/mo**

$9,420/mo sitting empty right now · **2 units with zero inquiries** — 907 Fernwood B and 12 Alder St

HOW THE AI GETS THERE

Step	What happens	Why it matters
1	**Subtracts one list from the other**	Units minus active leases equals vacant. Simple arithmetic that no single report in your system tends to hand you
2	**Counts days vacant**	From the last lease's end date to today — the number that turns "we have four vacancies" into "one of them has been empty since January"
3	**Matches and dedupes inquiries**	The same person inquiring through three portals is one prospect, not three. Inflated interest hides a real marketing gap
4	**Totals the lost rent**	Vacancy expressed in dollars per month, which is the only unit of measure an owner conversation runs in

> **If the vacant list looks wrong, it's almost always the unit list.** Rent rolls show occupied units, so vacancy is defined by what's *absent* — and the AI can only subtract from a roster it can see. Ask *"how many units did you find in each file?"* and the mismatch shows up in one line.

VARIATIONS

- **Marketing-gap view only:** *"Just show me vacant units with zero inquiries"* — the shortlist that needs advertising money this week.
- **Put a price on it:** *"Estimate rent lost to date on each vacant unit at its market rent, and total it."* Uncomfortable, useful, and exactly what an owner will ask.
- **Source quality:** *"Which inquiry sources produced the units that leased fastest?"* — budget guidance from data you already had.
- **Turn-ready check:** add your work order export and ask *"which vacant units still have open maintenance?"* A unit that can't be shown isn't really on the market.
- **Weekly rhythm:** *"Format this identically every week"* — days-vacant creeping upward is obvious when the layout doesn't move.

TIPS

- Days vacant belongs in the first column. It's the number owners remember and the one that drives urgency internally.
- Lots of inquiries but no showings is a follow-up problem, not a marketing problem. The board is what lets you tell them apart.
- Notice dates and move-out dates aren't the same field. Say which one you gave it.
- Run it Monday morning. It's a very different week when you know the empty rent figure before the owner does.

05 Owner call prep

A MULTI-STEP WORKFLOW

15 MIN

An owner is calling in twenty minutes. One prompt turns their properties, their money, and their open maintenance into a one-page brief you can talk from — instead of tab-hopping while the phone rings.

WHO IT'S FOR	WHAT YOU'LL GET	WHAT YOU NEED
Property managers and portfolio leads who own the owner relationship.	A structured one-pager ending in talking points you can actually say out loud.	Whatever you'd normally open in four tabs, filtered to this owner.

WHAT TO BRING

- **Property and unit list** for that owner, with a rent roll for those properties
- **Owner statement or ledger** for the period — rent collected, expenses paid, net disbursed
- **Open work orders** on their properties, with status, age, and cost so far
- **Your notes** (paste them — last call's promises are the highest-value input here)

THE PROMPT — COPY, EDIT THE [BRACKETS], PASTE

[Owner name] is calling me in 20 minutes. Attached are their [property and unit list], [rent roll], [owner statement for the last 90 days], and [open work orders]. Today is [date].

Build me a one-page brief:

1. **Portfolio health** — every property and unit, occupied vs. vacant, current rents, and an occupancy percentage
2. **Money picture** — rent collected, expenses paid, net to owner over the period, plus anything unusual versus the prior period
3. **Maintenance** — open work orders with status, age, and cost so far; flag anything expensive or stalled
4. **Anything I should remember** — from these notes: [paste your notes]

Tight enough to fit one page. Then end with 3–5 talking points in plain English — lead with the good news, and don't let me get surprised by anything on this list.

WHAT COMES BACK

ILLUSTRATIVE — YOUR DATA, YOUR NUMBERS

Portfolio — 3 properties, 11 units · **10 occupied (91%)** · 907 Fernwood B vacant 210 days **$19,840/mo**

Last 90 days — collected $57,260 · expenses $11,480 · **net $45,780** · maintenance up 38% vs. prior quarter

Open work orders — 3 · oldest water heater @ 907 Fernwood, 23 days, $1,850 estimate, unapproved

TALKING POINTS

1. Occupancy is 91% and every tenant paid on time in July — lead here.
2. The 3 Crescent Ct renewal is signed at +4%, effective September.
3. Fernwood B is the soft spot: 210 days vacant, and the water heater has to be replaced before it can be shown. Have the $1,850 approval ready to ask for.

HOW THE AI GETS THERE

Step	What happens	Why it matters
1	Narrows to one owner	Filters a portfolio-wide export down to the properties that belong in this conversation and nothing else
2	Computes the headline numbers	Occupancy percentage, net to owner, total maintenance spend — the three figures the call opens with
3	Hunts for anomalies	An expense well above the prior period, a work order open for six weeks — the things you don't want discovered on the call
4	Writes the talking points	Facts turned into sentences, ordered so the good news lands before the plumbing bill. The most valuable line in the prompt

Pure read. Actually moving money — distributions, payments, refunds — still happens in your software, by you.

VARIATIONS

- **Make it monthly:** *"Run this same brief as of the first of the month, formatted identically each time"* — a comparable record, and a solid skeleton for your owner newsletter.
- **Prep a hard conversation:** *"We have to tell them about a $4,200 sewer line. Write that explanation the way I'd want to hear it if it were my building"* — then edit until it sounds like you.
- **Turn it into the email:** *"Now write this as a short owner update email"* — for the owners who'd rather read than talk.
- **Do the whole book at once:** run it across all owners and ask *"one paragraph per owner, and flag the three who most need a call this month."*
- **Zoom in:** *"Just [123 Main St] — full detail on the leases, every transaction this quarter, and the complete maintenance history."*

TIPS

- Filter before you export if your system allows it. A portfolio-wide file works, but a filtered one is faster and leaves less room for a mismatch.
- Owner names are inconsistent across exports — "Smith Family Trust" and "Smith, John" are often the same person. Say so up front.
- "Lead with good news" is doing real work. A brief that opens with occupancy and on-time rent sets a very different tone than one that opens with a repair bill.
- Ask for the one-pager *and* the backup: *"then give me a detail appendix I can refer to if they dig in."*
- Paste last call's notes. The line that builds the most trust is the one that starts "last time we spoke, you asked about..."

What changes when it’s connected

Every recipe in this book works on an export. That’s the point — you shouldn’t need to change software or file an IT ticket to find out whether AI is useful in your business.

But there’s a tax to doing it this way: files pulled by hand, addresses matched across exports that format them differently, and answers that are only as fresh as your last click of “export.”

The version without the export step

Connect Claude directly to Rentvine and the first half of every recipe disappears. Ask the question, it queries live records, and every line links back to the lease, the work order, or the ledger it came from. The prompt barely changes; what changes is that it’s true right now.

Four exports and fifteen minutes.
Or one question and four seconds.

Same recipe. The only difference is who did the work.

> This is what Rentvine’s MCP connection does. A direct, permission-scoped link between your Rentvine account and your AI assistant, about ten minutes to set up. Reads run on your existing permissions, anything that writes is previewed and confirmed by you first, and money never moves through it. New recipes ship to this connection on an ongoing basis, including the ones an export can’t touch: maintenance dispatch, inspection follow-up, vendor scorecards, whole-portfolio turn season.

Where to start

- **This week:** run Recipes 01 and 02 on last month’s exports. You’ll know within an hour.
- **This month:** pick the one that saved the most time and make it a standing habit.
- **When exporting starts to annoy you:** that’s the signal. Ask us about connecting your system directly.

With Rentvine’s MCP, you can do even more.

More recipes, running on live account data instead of exports, on the platform propertymanagement.com just ranked #1.

schedule a demo

42
days average to go-live

80%
of migration handled for you

#1
ranked pm software