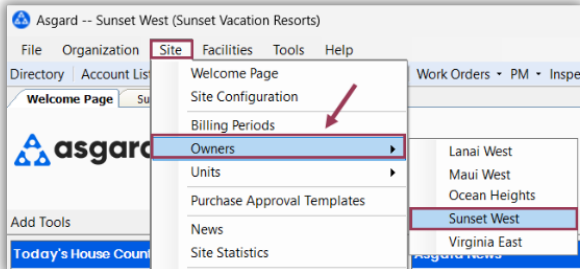
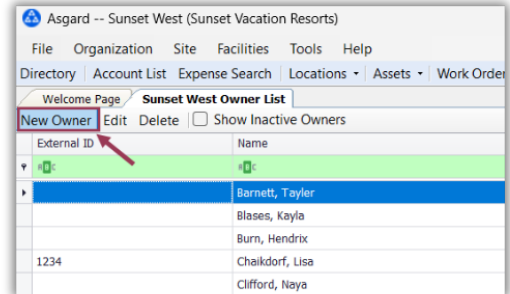


Add New Owner to Unit

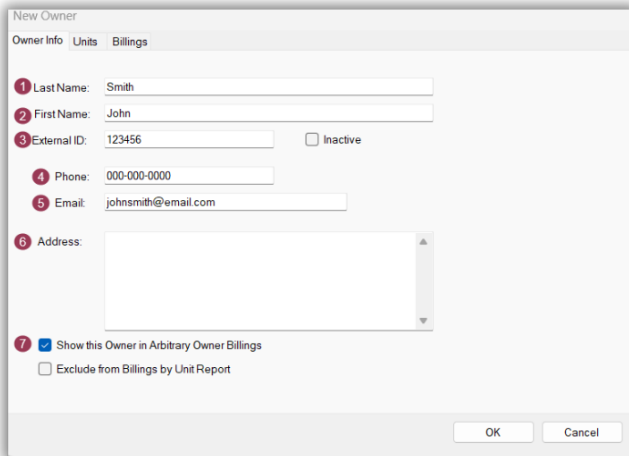
Step 1: From the **Site** drop-down, select **Owners** and then choose the property.



Step 2: From the Owner List, select **New Owner**.



Step 3: Enter owner information.



1. Last Name (Required)

- For businesses or HOA/entity owners, enter the legal entity name.

2. First Name

3. External ID

- Optional field for storing an account number or other identifier your site uses to track an owner.

4. Phone Number

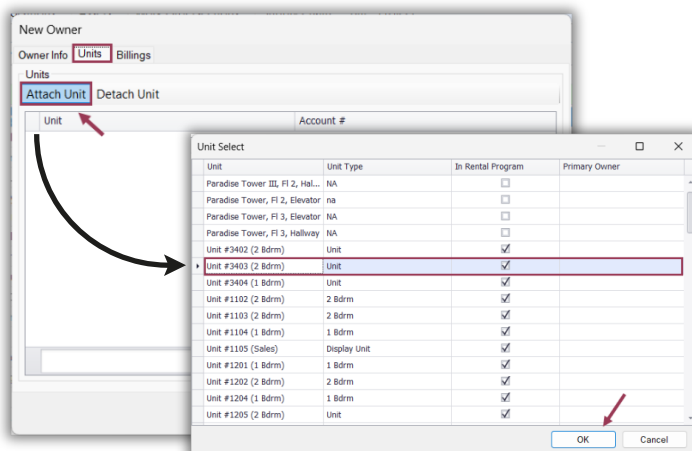
5. Email

6. Address

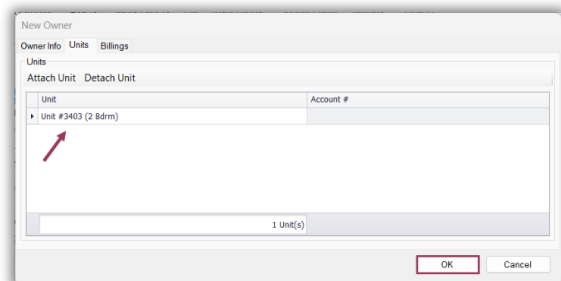
7. Show this Owner in Arbitrary Owner Billings

- Enables charges not associated with a unit to be billed directly to the owner.

Step 4: Select the **Units** tab. Click **Attach Unit**. In the pop-up window, locate and select the desired unit, then click **OK**.



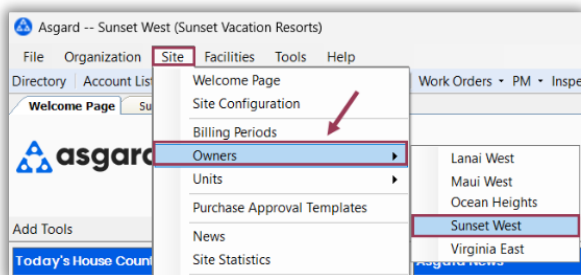
Step 5: Verify the unit appears under the **Units** tab. If additional units need to be attached, repeat Step 4. Click **OK** to save your changes. The Owner window will remain open. Click **Cancel** to close the window.



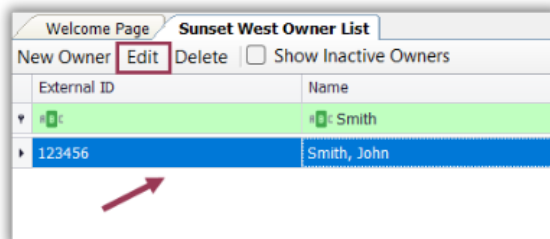
Note: The **Billings** tab is organization-specific. Do not make changes on this tab. If updates are needed, please contact Asgard Support.

Remove an Owner from a Unit

Step 1: From the **Site** drop-down, select **Owners** and then choose the property.



Step 2: From the Owner List, select the owner, then click **Edit**.



Step 3: Select the **Inactive** checkbox next to the External ID field, then click **OK**.

Tip: We recommend leaving the owner's information and attached unit(s) in place. This enables billing the previous owner if needed and preserves their information for historical records.

The screenshot shows the 'Smith, John' owner information form. The 'Inactive' checkbox is checked. The 'OK' button is highlighted with a red box.

Owner Info Units Billings

Last Name: Smith
First Name: John
External ID: 123456 ☒ Inactive
Phone: 000-000-0000
Email: johnsmith@email.com
Address:

☒ Show this Owner in Arbitrary Owner Billings
☐ Exclude from Billings by Unit Report

OK Cancel