



User Manual

PropertyBoss JobAids

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PropertyBoss JobAids

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PropertyBoss JobAids

PropertyBoss has developed several JobAids to help with the daily activities within PropertyBoss.

The following JobAids are currently available:

- [Getting Started Checklist](#)
- [Owner Decision Flowchart](#)
- [Lifecycle Activities](#)
- [Transaction Cycle - Overview](#)
- [Transaction Cycle - Detail](#)
- [QuickBooks Interface - Setup](#)
- [QuickBooks Interface - Sending Transactions](#)
- [Creating Merlin Reports](#)
- [Work Order Cycle - Detail](#)
- [Work Order Cycle - Overview](#)
- [Creating Properties and Units](#)
- [Creating Contacts](#)
- [Creating Owners](#)
- [Creating Leases](#)
- [Creating Prospects](#)

These JobAids are formatted in a variety of formats:

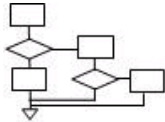
- Checklists - Utilized by marking the items on the list as 'Yes', 'No', or 'Not Applicable' and providing notes as needed.

Your Checklist
☐ What you want
☐ What you need

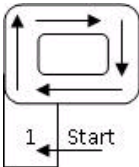
- Task/Action Tables - Utilized by reading the Task to be completed on the left and the appropriate Actions to complete the Task on the right.

#	Action	Result
1	CLICK icon	Window opens
2	SELECT box	Item highlights
3	CLICK Reply	Window opens

- Flowcharts - Utilized by starting at the top of the page and making decisions based on the questions in the matrix. The chart will provide the best recommended action.

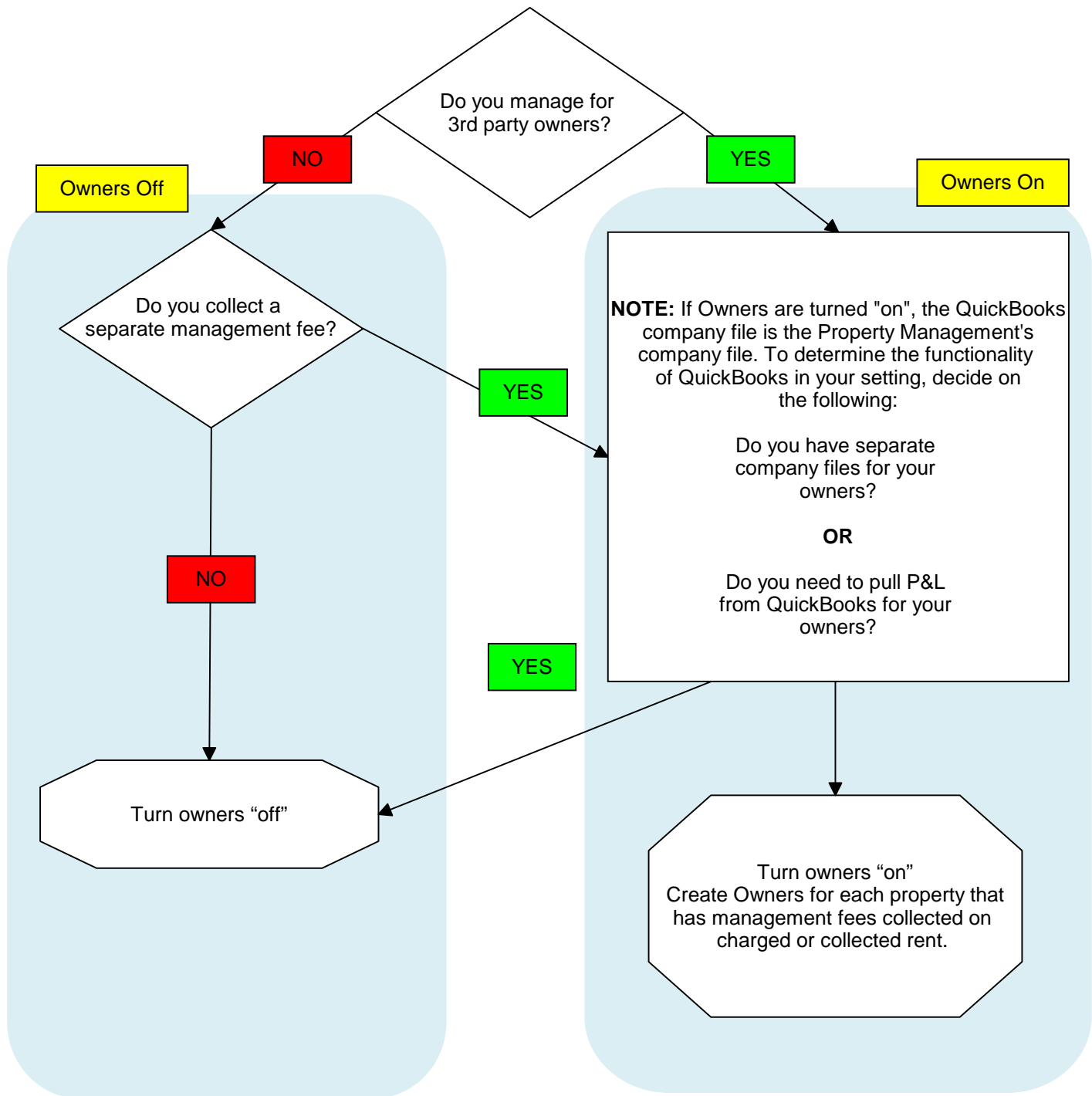


- Task Cycle Diagram - Utilized by starting at the base of the cycle and reading up and to the right. The cycle will continue or conclude at the intersection of the last task and first task after the base (step 2).



Yes	No	NA	Task	Notes
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Determine your go-live date – the date that you will begin posting rent charges and payments for the first time in PropertyBoss	
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Install software <ul style="list-style-type: none"> • Create Database • Register Software/Database 	
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Setup users and user security	
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Review/update personal preferences	
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Review/update system-wide setup preferences <ul style="list-style-type: none"> • Processing options • Global preferences • Autopost preferences • Backup preferences • Define transactions • Closing preferences • Company information • Predefined values • Report headings • Task/work order setup 	
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Setup add-on modules	
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Import/enter/review your properties, units, leases, tenants, and starting balances	
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Import/enter /review your property, unit, and lease repeating charges	
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Add additional property, unit, lease, or tenant details	
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Enter scheduled rent changes	
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Enter existing lease renewals	
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Enter existing lease notices	
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Setup the interface between PropertyBoss and QuickBooks	
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Review/update Next Post Date and Paid through Date leases	
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Review/update Next Post Date and Paid through Date for repeating charges	

Daily Activities	Run autopost <ul style="list-style-type: none"> Post all recurring charges for the day
	Close batches <ul style="list-style-type: none"> Close batches taken/sent to the bank
	Export to QuickBooks <ul style="list-style-type: none"> Reconcile PropertyBoss and QuickBooks
Week-end Activities	Run summary reports <ul style="list-style-type: none"> Reconcile with accounts and QuickBooks
Month-end Activities	Close month in PropertyBoss <ul style="list-style-type: none"> Ensures that PropertyBoss, accounts and QuickBooks balance
	Run summary reports <ul style="list-style-type: none"> Reconcile with accounts and QuickBooks
Intermittent Activities (throughout month)	Move-out or Renew leases <ul style="list-style-type: none"> Move-out leases that have given notice as well as evictions – ends the lease in PropertyBoss and frees the unit for a new lease Renew leases to ensure that history is tracked and new charges can be posted
	Enter new leases <ul style="list-style-type: none"> Enter leases through Prospects or the Units and Leases Navigator
	Post miscellaneous charges <ul style="list-style-type: none"> Damages, cleaning, maintenance, etc. for the property, unit or lease
	Run reports <ul style="list-style-type: none"> Verify renewals, late fees, deposits, etc. that need to be tracked before the end of the month
	Track prospect activities <ul style="list-style-type: none"> Enter communications, transactions and update the status of each prospect in the database



NOTE:
Because of the implications of the owner setting, if there are any questions or doubts whether owners should be turned on or off, please contact the Help Desk when establishing your database. The Owner preference can be adjusted at a later date, but the implications can be serious.

Task...	Action(s)...
Verify Lease Information	Check that existing lease information is correct <ul style="list-style-type: none"> • Update any old leases with new information • Enter new lease information
Post Charges	Run AutoPost <ul style="list-style-type: none"> • Verify 'Rent Due' amounts are correct • Verify any other 'Repeating Charges' are correct • Post charges to appropriate accounts (click 'Execute')
Receive Payments	Record payments from tenants <ul style="list-style-type: none"> • Enter transactions using QuickPay or as individual transactions • Verify transaction information is correct (dates, amounts, payee, etc.)
Enter Bills (if applicable)	Record all bills for properties, units, or leases that are not recurring charges <ul style="list-style-type: none"> • Enter maintenance, repair, or cleaning bills paid by owner or profit/loss • Enter charges that tenants will be responsible for • Enter payments received from tenants to pay bills (credits owner when paid)
Verify Register Information	Check that amounts charged and received are correct and accurate <ul style="list-style-type: none"> • Verify all transactions entered reflect accurate amounts • Verify balance amount
Create Deposit	Mark transactions to be included in deposit <ul style="list-style-type: none"> • Total collected should equal bank deposit slip • Verify transactions are of the correct type for the deposit (i.e. – Security, Tenant, etc. payments) • Click Create Deposit to add transactions to the deposit
Make Deposit	Close the Deposit in PropertyBoss <ul style="list-style-type: none"> • Verify amounts, payee, and dates are correct prior to closing • Take deposit to bank
Send to Accounting (if using accounting package)	Verify all amounts and accounts in PropertyBoss PRIOR to sending to accounting <ul style="list-style-type: none"> • Ensure transactions are correct prior to sending to accounting to keep from having to correct multiple transactions • Verify transactions going to accounting through the General Ledger • Send transactions to accounting • View/Print General Ledger reports
Reconcile with Accounting (completed on a daily basis)	Verify amounts in PropertyBoss match bank account amounts, and accounting system <ul style="list-style-type: none"> • Ensure amounts in PropertyBoss, QuickBooks, and bank accounts are consistent • Print reports
Post Late Fees (as setup in the lease)	Run AutoPost <ul style="list-style-type: none"> • Verify 'Late Fee' charges in AutoPost are accurate based on lease settings • Correct all leases with discrepancies • Post charges to appropriate accounts (click 'Execute')
Post Various Charges (as needed)	Record periodic monthly transactions <ul style="list-style-type: none"> • Enter tenant responsible charges (i.e. – damages, facility rentals, cleaning, etc.)
Receive Payments	Record payments from tenants <ul style="list-style-type: none"> • Enter transactions using QuickPay or as individual transactions • Verify transaction information is correct (dates, amounts, payee, etc.)
Create Deposit	Mark transactions to be included in deposit <ul style="list-style-type: none"> • Total collected should equal bank deposit slip • Verify transactions are of the correct type for the deposit (i.e. – Security, Tenant, etc. payments) • Click Create Deposit to add transactions to the deposit
Reconcile with Accounting (completed on at month end)	Verify amounts in PropertyBoss match bank account amounts, and accounting system <ul style="list-style-type: none"> • Ensure amounts in PropertyBoss, QuickBooks, and bank accounts are consistent • Print reports
Close Accounting Period	Mark period closed in Setup Preferences at end of transactional period (month end) <ul style="list-style-type: none"> • Close manually • Let PropertyBoss automatically close based on settings

⑦ Reconcile with Accounting

- Verify amounts in PropertyBoss match bank account amounts, and accounting system
- Ensure amounts in PropertyBoss, QuickBooks, and bank accounts are consistent
- Print reports

⑥ Send Charges/Deposits to Accounting

- Verify all amounts, transactions, and accounts in PropertyBoss PRIOR to sending to accounting
- Verify transactions going to accounting through the General Ledger and send to accounting
- View/Print General Ledger reports

⑤ Close Deposit

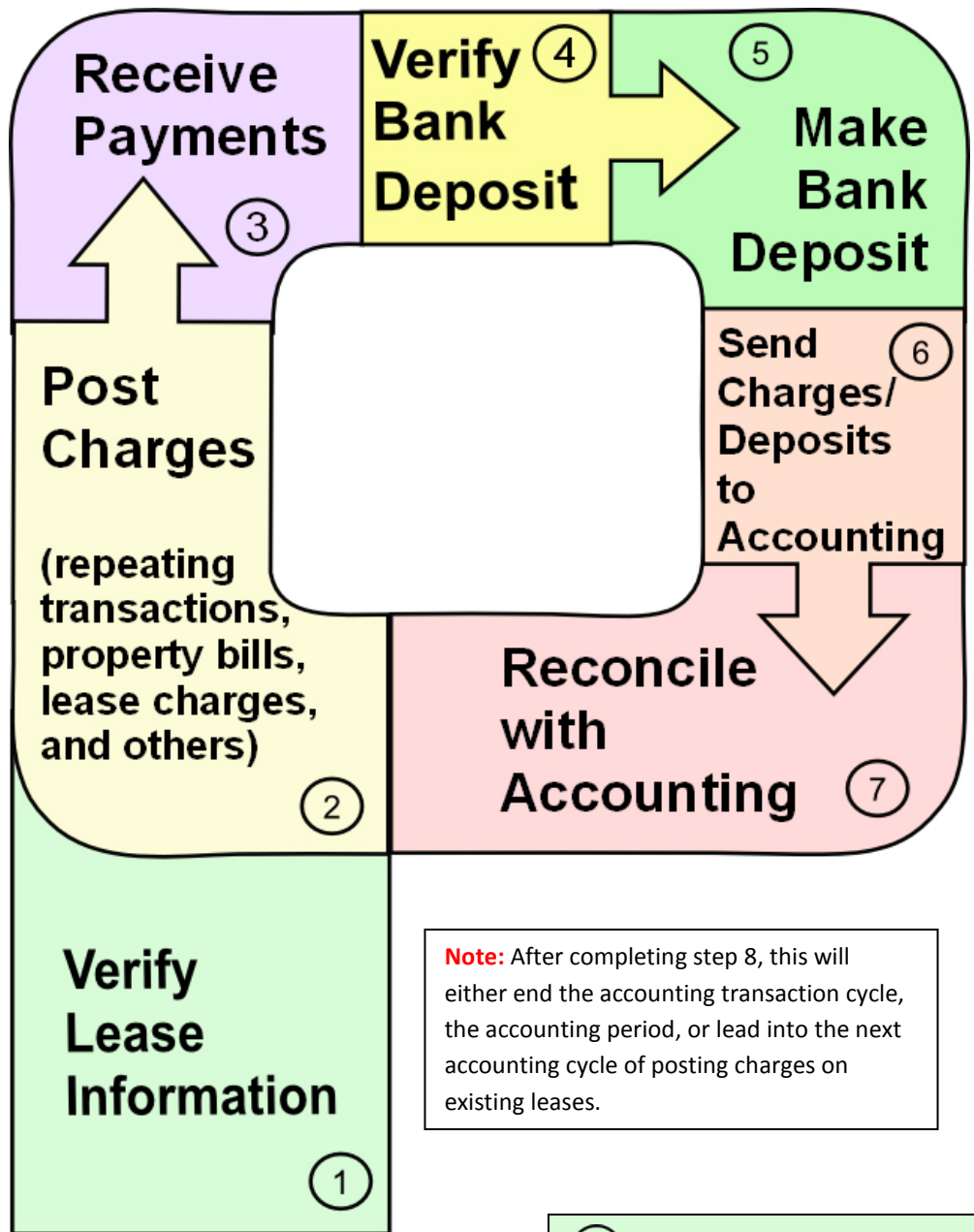
- Close the Deposit in PropertyBoss
- Verify amounts, payee, and dates are correct prior to closing
- Take deposit to bank

④ Create Deposit

- Check to ensure monies collected equal amounts recorded in PropertyBoss
- Deposit in PropertyBoss should equal bank deposit slip

③ Receive Payments

- Enter transactions using QuickPay or as individual transactions
- Verify transaction information is correct (dates, amounts, payee, etc.)



Note: After completing step 8, this will either end the accounting transaction cycle, the accounting period, or lead into the next accounting cycle of posting charges on existing leases.

② Post Charges

- Run AutoPost
- Verify 'Rent Due' amounts are correct
- Verify any other 'Repeating Charges' are correct
- Post charges to appropriate accounts (click 'Execute')

① Verify Lease Information

- Check that existing lease information is correct
- Update any old leases with new information
- Enter new lease information

Task...	Action(s)...
Define QuickBooks Account	<p>Name the company file in PropertyBoss that describes how this file will be used</p> <ul style="list-style-type: none"> Extremely important when more than 1 accounting file is used
Determine Application	<p>Determine the type of accounting used</p> <ul style="list-style-type: none"> Cash (transactions sent when paid) – Can be defined two ways: <ul style="list-style-type: none"> Simple – Sends over Deposits, Bills to Pay, and Checks to be written Detail – Sends the above plus journal entries. All PropertyBoss transactions will be mapped to the QuickBooks chart of accounts Accrual (transactions sent when charged) – Sends Invoices, Credit Memos, Payments, Bills, Checks and Journal Entries
Describe Use	<p>Describe how this accounting file will be used</p> <ul style="list-style-type: none"> Determine a prefix (3 characters) that will be used when sending batches to QuickBooks
Locate File	<p>Locate the file on the drive or network</p> <ul style="list-style-type: none"> If QuickBooks is located on a network drive, you must use a mapped drive for the location If found on remote site, see the Remote Settings below
Determine File Settings	<p>Determine the setting for the interface with QuickBooks</p> <ul style="list-style-type: none"> Utilize Classes (if used in QuickBooks) Utilize Vendor creation in PropertyBoss
Remote Setup	<p>Determine settings for a remote site</p> <ul style="list-style-type: none"> Send Method – Save file and email Import – From file or email inbox Determine the location for the file (located on the local machine)
Retrieve Information from QuickBooks	<p>Retrieve various information to establish setup in PropertyBoss</p> <ul style="list-style-type: none"> Chart of Accounts Classes (if used) Vendors – Master list is found in QuickBooks. All edits to information should be made there.
Accounting File Use	<p>All properties and Owners associated with the accounting file will be listed</p> <ul style="list-style-type: none"> Select from the Accounting Override dropdown on the Property Notebook if using more than 1 accounting file Select from the Accounting Override dropdown on the Owner Notebook → Statement tab, if using more than 1 accounting file
Define Transaction Set	<p>Each PropertyBoss Transaction will be mapped to a particular account in the QuickBooks Chart of Accounts</p> <ul style="list-style-type: none"> Select the appropriate account from the dropdown New transactions will need to be mapped before sending to QuickBooks Transactions marked with a red 'X' still need to be mapped
Import from QuickBooks	<p>Information related to QuickBooks that PropertyBoss will utilize will be imported</p> <ul style="list-style-type: none"> General Ledger Settings – Chart of Accounts, Vendors, and other setup values from the General Ledger Check Numbers – Check Numbers and Date Paid for Checks and Bills sent to QuickBooks

Task...	Action(s)...
Open General Ledger	Click on General Ledger <ul style="list-style-type: none"> Once open, click on Pending Interface Runs Select Accounting File (if more than 1 accounting file defined)
Verify Items to Send	Choose the items from the list <ul style="list-style-type: none"> Payments Received (Income) Bills to Pay/Checks (Expenses) Other Transactions (Various PropertyBoss Transactions)
View PropertyBoss Transactions	All PropertyBoss Transactions being sent will show <ul style="list-style-type: none"> Verify transactions being sent Using Actions, mark transactions that are: <ul style="list-style-type: none"> Already Sent Need to be removed from the interface run Verify and maintain batch information Usually all transactions should be selected
View Transactions going to QuickBooks	Verify Deposits and Expense totals <ul style="list-style-type: none"> Check Details for specific information Make corrections by clicking select PropertyBoss source transactions
Send to QuickBooks	When all information is verified, click Send to send information to the selected QuickBooks company file
Print Reports	Print recap and interface reports <ul style="list-style-type: none"> Click View Previous Interface Runs and select the correct dates Click Reports and choose the specific reports desired

Task...	Action(s)...
Open a Navigator	Open appropriate Navigator <ul style="list-style-type: none"> • Rent Roll • Owner, Tenant, Vendor • Work Order Groups (Call Logging, Work Orders, Inspection) • Transaction Search
Modify Report	Open modify report window <ul style="list-style-type: none"> • Click Modify Report • Click past Merlin information (turn off iF desired)
Modify Layout	Open Layout options <ul style="list-style-type: none"> • Add details from information found in Unit/Leases • Move columns to left and right as desired for report • Remove columns by un-checking or double clicking on the item
Modify Group(s)	Create groups based on detail item(s) chosen <ul style="list-style-type: none"> • Groups similar items together • Can provide subtotals (if checked)
Modify Sort	Create a sort field/sub field <ul style="list-style-type: none"> • Can be sorted ascending or descending by letter or number
Modify Filter(s)	Create filters to exclude or include specific information <ul style="list-style-type: none"> • Click Edit the Filter and determine Standard filter settings • Modify Custom filters <ul style="list-style-type: none"> ○ Column – field to include or exclude ○ Condition – how the field will be included/excluded ○ Value – Numeric or text information <ul style="list-style-type: none"> ▪ Ask – can be modified when opened or refreshed
Save Report	Determine 'Save' conditions <ul style="list-style-type: none"> • Save to current report • Save as a new report • Rename report • Delete report

Task...	Action(s)...
Open Work Order Request	<p>Create a new task through one of the work order groups or in the particular level (property, unit, lease, etc.)</p> <ul style="list-style-type: none"> Click New in correct Work Order Group Fill in short description, status, type and all applicable information
Assign Work Order	<p>Assign task to either a PropertyBoss user or a vendor (internal/external)</p> <ul style="list-style-type: none"> Assign work order to vendor/internal maintenance Work Orders/Inspections – Vendors Call Logging – PropertyBoss Users
Enter Description	<p>Enter appropriate information for long description</p> <ul style="list-style-type: none"> Enter the Long Description information Enter directly in text box (enters text only) Use 'Add Comment' (enters text and time/date/user with comment)
Assign Account	<p>Assign task to appropriate level within the database</p> <ul style="list-style-type: none"> Assign to correct PropertyBoss account (property, unit, lease, etc.) Will be tied to that account for tracking purposes on the notebook for that level
Enter Details	<p>Enter details for the task that are required or for tracking specific information</p> <ul style="list-style-type: none"> Create and track work order groups specific details Maintain detail fields in Setup Preferences -> Work Orders -> Details
Verify Information	<p>Verify information associated with the vendor and tenant assigned to the task</p> <ul style="list-style-type: none"> Verify tenant, vendor and history information Add information for warranty, requested by, and other pertinent information
Enter Media	<p>Attach related media related to the task to provide documentation</p> <ul style="list-style-type: none"> Add Applicable media to the work order Add pictures of damage, invoices, emails or other related documents
Enter Transactions	<p>Attach related transactions</p> <ul style="list-style-type: none"> Add transactions on the appropriate account <ul style="list-style-type: none"> Will show on the appropriate register and have a link to the work order Property/Unit: Transactions found in the Property/Unit transaction set Lease: Transactions available in the Lease/Prospect transaction set
Enter Updates or Close Work Order	<p>Enter status updates, new description information and details or close the task and enter completion information</p> <ul style="list-style-type: none"> Add comments to the long description area, change the status as it progresses through creation to completion Add related work orders, unrelated work orders or relate and initiating call to a new work order Close task when work has been completed and enter comments

7 Enter Media & Transactions

- Add Applicable media to the work order
- Add pictures of damages, invoices, or emails received or other related documents
- Add transactions on the appropriate account (will show on the appropriate register and have a link to the work order)

6 Verify Information

- Verify tenant, vendor and history information
- Add information for warranty, requested by, and other pertinent information

5 Enter Details

- Create and track work order groups specific details
- Maintain detail fields in Setup Preferences -> Work Orders -> Details

4 Assign Account

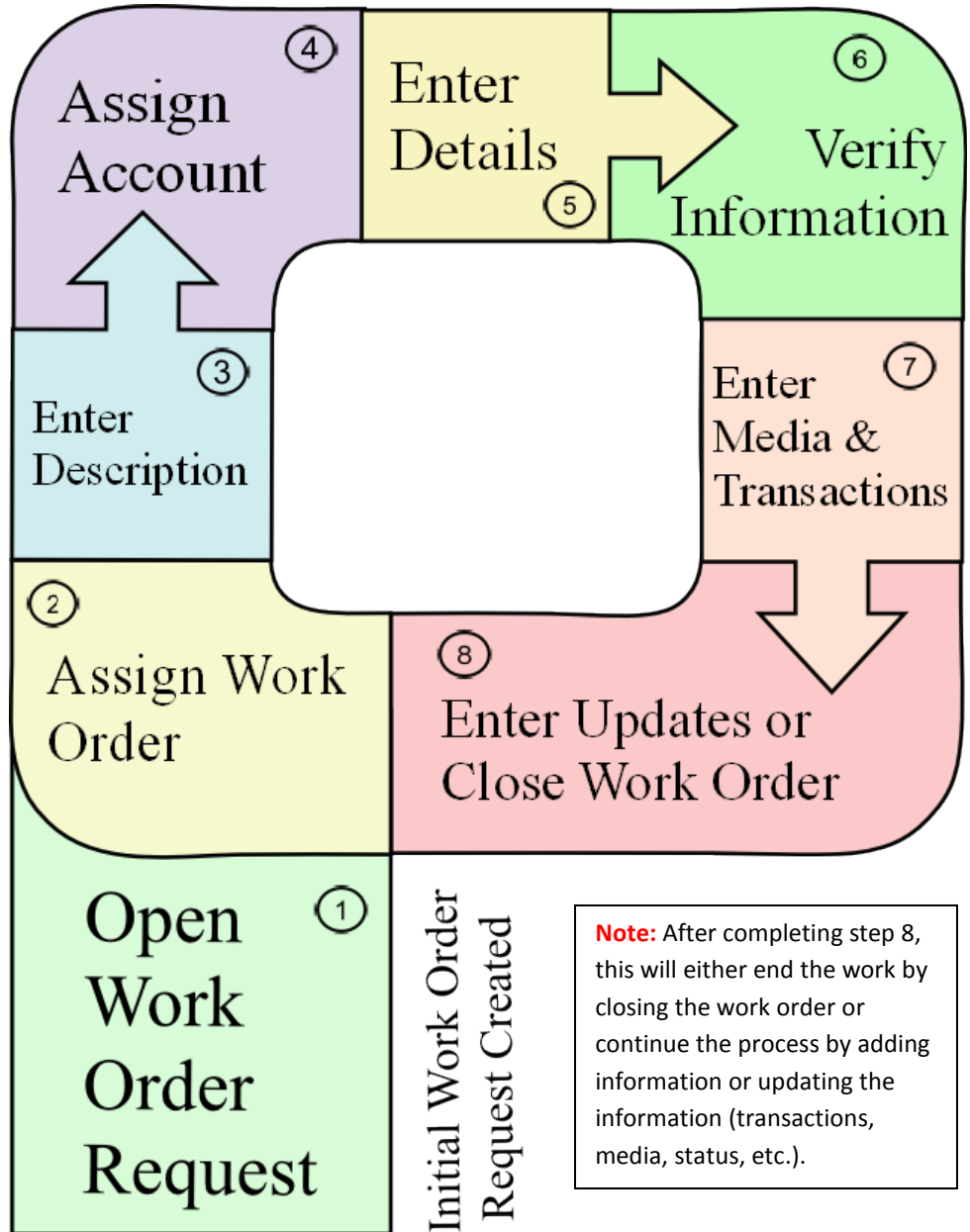
- Assign to correct PropertyBoss account (property, unit, lease, etc.)
- Will be tied to that account for tracking purposes on the notebook for that level

3 Enter Description

- Enter the Long Description information
- Enter directly in text box (enters text only)
- Use 'Add Comment' (enters text and time/date/user with comment)

8 Enter Updates or Close Work Order

- Add comments to the long description area, change the status as it progresses through creation to completion
- Add related work orders, unrelated work orders or relate and initiating call to a new work order
- Close task when work has been completed and enter comments



Note: After completing step 8, this will either end the work by closing the work order or continue the process by adding information or updating the information (transactions, media, status, etc.).

2 Assign Work Order

- Assign work order to vendor/internal maintenance
- Work Orders/Inspections – Vendors
- Call Logging – PropertyBoss Users

1 Open Work Order Request

- Click New in correct Work Order Group
- Fill in short description, status, type and all applicable information

Task...	Action(s)...
Open the Units and Leases Navigator	The Units and leases Navigator is used to Create New Properties or add Units to multi-unit properties
Create New Property	Click on Create New Property to open a new Property Notebook <ul style="list-style-type: none"> Select Single Unit or Multi-Unit Property
Name the Property	Create a unique name for the property <ul style="list-style-type: none"> Name will show on Units and Leases Navigator list Can be a company specific name or the address (numeric or text)
Enter Property Specific Information	Property information will carry into reports and the Rent Roll Navigator <ul style="list-style-type: none"> Enter the property address, type and other relevant information for the property Define the location of the unit number by adding <unit> in the desired location If using multiple QuickBooks files, you can also direct the accounting setup
Enter Property Details	Enter details that describe the property <ul style="list-style-type: none"> Enter specific information (will also be available on the Rent Roll Navigator) Create new detail fields (click Change Layout button)
Attach Media	Property specific media only should be attached <ul style="list-style-type: none"> Includes: images, pdf documents, and Microsoft Office files Should show images of property or floor plans or property related files
Add Owners	Relate owners of the property and define Management fees <ul style="list-style-type: none"> Add already created owners or create new owners for the property Define Leasing/Renewal, Rent Commission, Vacancy, and Surcharge fees as applicable
Enter Repeating Charges/Credits	Recurring transactions charged or credited can be set on the property level <ul style="list-style-type: none"> Charges such as pest control, security systems, or HOA fees can be added Charges that need vendor bills out of QuickBooks will need a vendor defined All charges will be reflected under the Property Profit/Loss report
Enter Defaults	Single Unit Property defaults will be entered at the creation of a new lease <ul style="list-style-type: none"> Terms (rent): transaction, market rent, and frequency Late Fees: enter the type, day after rent is charged, and amount Deposits: security, pet, or other required returnable deposits Repeating Charges/Credits: utilities, concessions, or parking <ul style="list-style-type: none"> These items are usually credited to the owner/property management when paid to cover property repeating charges
Create Units (for multi-unit properties)	Create the units that fall under the main property <ol style="list-style-type: none"> Create as a Regular or Template format Copy or model after an existing format Name each unit, click new for additional units
Enter Details	Enter details that describe the unit <ul style="list-style-type: none"> Enter specific information (will also be available on the Rent Roll Navigator) Create new detail fields (click Change Layout button)
Attach Media	Unit specific media only should be attached <ul style="list-style-type: none"> Includes: images, pdf documents, and Microsoft Office files Should show images of the unit or floor plans or property related files
Enter Defaults	Multi-Unit defaults will be entered at the creation of a new lease <ul style="list-style-type: none"> Terms (rent): transaction, market rent, and frequency Late Fees: enter the type, day after rent is charged, and amount Deposits: security, pet, or other required returnable deposits Repeating Charges/Credits: utilities, concessions, or parking <ul style="list-style-type: none"> These items are usually credited to the owner/property management when paid to cover property repeating charges

Task...	Action(s)...
Contacts Navigator	All contacts (tenants, residents, members) are found under the Contact Navigator
Create Contact	Click New to create contacts within the Contact Navigator or within the Lease (Create Contact) <ul style="list-style-type: none">• Opens the Contact Notebook
Enter Contact Name	Choose the type of contact, individual or company <ul style="list-style-type: none">• Enter First and Last Name (creates file as name)• If contact is a company, the name entered will be the primary contact
Contact Information	Enter remaining contact info <ul style="list-style-type: none">• Information can be tracked on the Rent Roll and Contact Navigators for custom reports
Enter Details	Enter details that describe the contact <ul style="list-style-type: none">• Enter specific information (will also be available on the Contact Navigator)• Create new detail fields (click Change Layout button)
Address Information	Complete address information <ul style="list-style-type: none">• Addresses can be defined for mailing, billing, or forwarding• Create address types in Setup Preferences (Predefined Values)• Define the current for mailing and billing addresses
Attach Media	Contact specific media only should be attached <ul style="list-style-type: none">• Includes: images, pdf documents, and Microsoft Office files• Should show images of contact or files specific to the contact

Task...	Action(s)...
Owners Navigator	All owners are found under the Owners Navigator
Create Owner	<p>Click New to create contacts within the Owners Navigator</p> <ul style="list-style-type: none"> Click 'New' Opens the Owner Notebook <p>From within the Property Notebook:</p> <ul style="list-style-type: none"> Click Owner Actions -> Add Owner Complete the Owners Name and ownership percentage Click 'Yes' to add owner on list of valid owners
Enter Owner Name	<p>Choose the type of contact, individual or company</p> <ul style="list-style-type: none"> Enter First and Last Name (creates file as name) If contact is a company, the name entered will be the primary contact
Owner Information	<p>Enter remaining contact info</p> <ul style="list-style-type: none"> Add contact information (phone, address, 1099 information) Enter Reserve Amount (will be withheld when paying owners) Information can be tracked on the Rent Roll and Owner Navigators for custom reports
Enter Details	<p>Enter details that describe the contact</p> <ul style="list-style-type: none"> Enter specific information (will also be available on the Owner Navigator) Create new detail fields (click Change Layout button)
View Ownership, Work Orders, and Transactions	<p>View information associated with the owner</p> <ul style="list-style-type: none"> Ownership shows all properties the owner is associated with Work Orders shows all associated work orders Transactions shows transactions that are related to the owner (Transfer of Rent Due, Payments to Owner, and Expenses)
Define Statement Default	<p>Define how the statement will be delivered</p> <ul style="list-style-type: none"> Mail/Print format will not allow for email function Email will be available and based on owner's email address <p>Note: The associated Accounting file can also be set if it is different than the default or if the Property/Owner Notebook value is selected from the General Ledger Setup</p>
Attach Media	<p>Owner specific media only should be attached</p> <ul style="list-style-type: none"> Includes: images, pdf documents, and Microsoft Office files Should show images of contact or files specific to the contact

Task...	Action(s)...
Open the Units and Leases Navigator	<p>The Units and leases Navigator is used to Create New Leases to properties</p> <ul style="list-style-type: none"> • Select the desired property • Click on Create a New Lease for this Property
Confirm Property	<p>After selecting the property and clicking on the New Lease button, confirm the property</p>
Enter Start/End Dates for New Lease	<p>To create the lease, you must have a start and end date</p> <ul style="list-style-type: none"> • Month-to-month: current month as start/end date • Annual: agreed start and end date as shown on lease
Verify Terms	<p>Confirm rent amount, frequency, and enter lease comments</p> <ul style="list-style-type: none"> • Rent amount will default to market rent of property/unit • Charges will default to default charges of property/unit • Late Fees will default to the default late fee of the property/unit <ul style="list-style-type: none"> ◦ Modifications can be made by clicking the Charges and/or late fees tab or the hyperlink found under each of the charges • Verify deposits • Auto-Post desired charges
Enter Lease Details	<p>Enter details that describe the lease</p> <ul style="list-style-type: none"> • Enter specific information (will also be available on the Rent Roll Navigator) • Create new detail fields (click Change Layout button)
Add Tenants/Contacts	<p>Add tenants to the lease</p> <ul style="list-style-type: none"> • Add already created tenants or create new tenants for the lease • Verify contact information is correct • Mark tenant type and select the primary tenant (if more than one)
View Register	<p>Verify charges</p> <ul style="list-style-type: none"> • Deposits charged at the creation of the lease • Auto-posted repeating charges (rent, utilities, etc.) • Enter applicable payments
Enter Lease Specific Comments	<p>Add comments that are lease specific</p> <ul style="list-style-type: none"> • Work Orders: provided for vendors for instruction on entering unit • Lease Payment: appear on the Late Payment Aging Summary Report
Verify Dates	<p>Verify dates as set when creating the lease</p> <ul style="list-style-type: none"> • Rent Paid Thru Date • Late Fees Applied Date • Next Post Date • Lease Renew By Date: used on the Renewal Report and can be tracked on the Rent Roll
Attach Media	<p>Lease specific media only should be attached</p> <ul style="list-style-type: none"> • Includes: images, pdf documents, and Microsoft Office files • Add a scanned copy of the signed lease

Task...	Action(s)...
Prospects Navigator	All prospects are found under the Prospect Navigator
Create Prospect	Click New to create contacts within the Prospect Navigator <ul style="list-style-type: none"> Opens the Prospect Notebook
Enter Prospect Name	Choose the type of prospect, individual or company <ul style="list-style-type: none"> Enter First and Last Name (creates file as name) If contact is a company, the name entered will be the primary contact
Prospect Information	Enter remaining prospect info <ul style="list-style-type: none"> Information can be tracked on the Rent Roll and Contact Navigators for custom reports Enter Source (required field) Create Sources <ul style="list-style-type: none"> Setup Preferences -> Add-on Modules -> Property Prospect Create and edit fields under Define Sources
Contacts	Enter related contacts to prospect <ul style="list-style-type: none"> Can be selected from existing contacts or can be created new
Attach Media	Contact specific media only should be attached <ul style="list-style-type: none"> Includes: images, pdf documents, and Microsoft Office files Should show images of contact or files specific to the contact
Enter Application Details	Enter information found under the Guest Card/Interview sections <ul style="list-style-type: none"> Enter specific information (will also be available on the Contact Navigator) Create Guest Card/Interview sections <ul style="list-style-type: none"> Setup Preferences -> Add-on Modules -> Property Prospect Create and edit fields under Define Guest Card/Interview Questions
Units Shown/Held	Track properties/units shown or put into a held status <ul style="list-style-type: none"> Properties/Units shown will be tracked and do not relate to other prospects Properties/Units held will be placed on a held status and can be held through a date or released early Priorities can be defined for a wait status
Register	Record charges and payments for the prospect <ul style="list-style-type: none"> Enter application and deposits charged Enter payments from the prospect Charges and payments will transfer to the lease register when/if they move into a managed unit
Activity	Track activities related to the prospect <ul style="list-style-type: none"> Record mailings, phone calls, and other forms of contact Change the status of prospect as they move throughout the application process