FIRST PACIFIC

FIRST PACIFIC GROUP, INC.

COMMUNITY MANAGER TRAINING GUIDE

Do not print this as we are updating it on A regular basis

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Calendar Blackouts

To add a Calendar Blackout to the CRM Calendar click Calendar \rightarrow Add \rightarrow Property Blackout \rightarrow Select your date \rightarrow Start time \rightarrow Duration Hours/minutes \rightarrow Add your Notes/Reason \rightarrow Save.

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=	Property						🖹 Prin	t Blank Application Map ≓ Jump To
	Property Settings G/L	Autumn Ridge Aparti 3902 Mayfield NE, Grand Rapid	nent Homes (ar) s, MI 49525					
Ъ	CRM Settings	Property Calendar						+ Add Blackout + Add Property Event
	CRM Profile	prev next today		C	oct 25 - 31 2020		One T Recur	ime
	Bulk Re-Assign	Sun 10/25	Mon 10/26 Office Hours:Autumn Ridge Apartment He Offi	Tue 10/27 fice Hours.;Autumn Ridge Apartment Ho	Wed 10/28 Office Hours:Autumn Ridge Apartment Ho	Thu 10/29 Office Hours: Autumn Ridge Apartment Ht O	Fri 10/ 0	S7 t 10/31 ▲
	Office Hours	10am						Office Hours.;Autumn Ridge Apartment Hom
	Property Calendar	11am						
	Term Based Premi	12pm						
	Source Costs	1pm		-		-		
ß	Communication			-	a a constant			
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188	🚳 Dashboard	Q Search 🖺 Reports 🋗 Calendar 🐵	CRM Queue 🛛 Gall Scoring 🔉 Lead	Attribution 💿 Site Manager	🖥 Leasing Management			營ALL ★ ? Ⅲ ✿
	Property		Add Blackout			🖺 Save 🗶	🖹 Prin	t Blank Application Map ≓ Jump To
		Autumn Ridge Apart	Property * Autumn Ridge Apart ×	*	Duration Hours *	0		
≡		3902 Mayfield NE, Grand Rapic	Start Date * 10/26/2020		Minutes *	0		Add Plackout Add Property Syent
ß	CRM Settings		Start Time * 2:10 PM	EST				
		prev next today	Notes					month week day
		Sun 10/25	Notes				Fri 10/30 ce Hours.;Autumn Ridge Apartment H	Sat 10/31
		10.00						Office Hours: Autumo Ridee Apartment Hom
		11am						



Community Dashboard

Unit Statistics: This shows current unit statistics such as Leased units, Occupied units and the percentage of both. Exposure is showed with Available units

Resident Activity: Shows Move-In's, Move-Outs, Move-out Deposit Accounting to be completed, Units on Notice, Expiring Leases, Scheduled Lease Renewals

The Daily Activity Report is something that should be looked at daily. This will give an overview of the property.



The calendar is extremely important and should be looked at daily. This shows all Move-ins, Moveouts, and appointments.

Maintenance: Shows Pending Make Ready, Pending Work Orders, and Completed Work Orders that need to be followed up on. Traffic: This shows the prospect pipeline which should be updated daily with all leads. And pending application.





Daily Activity Report

The Daily Activity Report shows Resident Exceptions, Month-to-Month Leases, current available apartments, Residents on Notice.

Resident Exceptions to be cleared daily.

Scheduled showings are also listed along with pending move-ins, Move-out Deposit Accounting to be completed, and expiring leases.

Delinquencies current and past, as well as pending work orders are also listed.

				F	lesident Excepti	ions			
Property	Excep	tion	Unit	Resident	Resident Name	Resident	Move In	Move Out	Notice
hc - 024 M	ove in na	ast due	hc21	t0050089	Kalra, Rahul	Future	8/6/2015	Date	Date
hc - 027 M	ove in pa	ist due	hc11	t0050211	Nguyen, Phuong	Future	9/9/2015		
hc - 020 M	ove Out I	Past Due	hc21	t0049275	McCourt, Chiara	Notice	4/7/2015	8/27/2015	7/27/2015
hc - 024 M	ove Out I	Past Due	hc11	t0041630	Charles, River	Notice	10/17/2014	//31/2015	6/26/2015
hc - 031 M	ove Out I	Past Due	hc11	t0046115	LeGue, Joseph	Notice	7/25/2012	8/20/2015	7/20/2015
hc - 086 M	ove Out I	Past Due	hcl1	t0046047	Bauducco, Brysor	n Notice	7/7/2014	7/31/2015	6/12/2015
hc - 113 M	ove Out I	Past Due	hc21	t0041098	Mendoza, Adelina	Notice	4/20/2012	8/30/2015	7/27/2015
Exceptions	: 8								
					Month to Mon	th			
Property	Туре	Unit	Code		Name	Month to M Charge	onth Lea	se From	Lease To
hc	hc21	130 to	0047602	Mo, Jianbir			200.00 11/24	1/2014 5	/31/2015
hc	hcl1	097 t(0044374	Sischo-Her	bert, Reiley		100.00 1/13/	2014 7	/31/2014
hc	hcl1	065 t	0049202	Cloud, Eric	a		0.00 6/5/2	014 6	/30/2015
hc	hc21	057 t	0046861	Mikowicz,	Aydan		0.00 10/7/	2014 7	/31/2015
nc hc	hcl1	100 t(0043211	Carroll, Ev	an		0.00 7/1/2	.014 7	/31/2015
hc	hcl1	087 t	0043781	Flores, Jus	tin		0.00 1/2/2	015 8	/31/2015
Month to M	Ionth: 8			,			, -, -		
D	oportu		Tur		Available Unit	S Market Re-	+	D	ocit
Pro	operty		hc21	e l	mit	Market Rei	2 050 00	Dep	osit
hc			hc21	113			2,050.00)	0.00
Available U	Inits: 2						2,000.00		0.00
	_				On Notice			1.0.1	
Property Ty	/pe Unit	Code	Na	ame i	Date Move Or	Reason	for Move Out	Resident	Move In Date
hc ho	1 086	t004604	17 Bauduce	co, Bryson 6/	12/2015 7/31/2	015 Relocate O	utside of Marke	et	
hc ho	21 024	t004678	9 Charles	River 6/	26/2015 7/31/2	015 Add/Lost F	oommate	t0050089	8/6/2015
hc h	21 031	t004611	5 LeGue,	Joseph 7/	20/2015 8/20/2	015 Relocate O	utside of Marke	36	
hc ha	21 020	t004109	8 Mendoz	a, Adelina 7/	27/2015 8/30/2	015 Purchased	Home		
hc ho	:11 027	t004163	30 Lucas, S	Stephanie 7/	29/2015 8/31/2	015 Relocate O	utside of Marke	et t0050211	9/9/2015
On Notice:	6								
					Showings				
Showings:	0								
					Movo In				
Property	Typ	e Unit	t Co	de	Name	Move T	n Lease	From	Lease To
hc	hc11	027	t00502	11 Nguy	en, Phuong	9/9/2015	9/1/2015	8/3	1/2016
hc	hc11	031	t00504	35 Casti	llo, Luis	9/5/2015	9/5/2015	9/3	0/2016
hc	hc11	059	t00504	37 Phare	es, Joseph	9/6/2015	9/6/2015	9/3	0/2016
hc	hc21	003	t005050	04 Cient 89 Kalra	Rabul	8/6/2015	8/8/2015	8/3	1/2016
hc	hcl1	086	t005002	23 Bram	bila, Angelica	8/1/2015	7/6/2015	7/3	1/2016
Move-Ins:	6								
				D	eposit Accounti	ng			
Property 1 hc	Type Un 1c21 00	it Co 3 t0046	ode 5792 Bre	Name reton, Adeline	Move Out L 7/27/2015 10	ease From /	Lease To /31/2015 44	Days Since M	love Out
hc h	nc11 05	9 t0046	5763 Ora	by, Shereen	7/28/2015 1	1/7/2014 8	/31/2015 43		
Deposit Acc	ounting	to be co	ompleted:	2					
Property	Tupe	1107+	Cod	Lease Ex	pirations (next	120 days)		m La	ase To
hc	hc11	047	t004360	7 Love,	Adam		7/13/2013	7/31/2	014
hc	hcl1	097	t004437	4 Sisch	-Herbert, Reiley		1/13/2014	7/31/2	014
hc	hc21	130	t004760	2 Mo, Ji	anbin		11/24/2014	5/31/2	015
hc	hc21	134	t004920	2 Cloud 9 Chen	, Erica Bin		0/5/2014	6/30/2	015
hc	hc21	0.57	t004/83	1 Mikov	vicz, Avdan		10/7/2014	7/31/2	015
hc	hcl1	100	t004321	1 Carro	II, Evan		7/1/2014	7/31/2	015
hc	hcl1	087	t004378	1 Flores	, Justin		2/1/2015	8/31/2	015
hc	hcl1	092	t004337	0 Yi, Gl	en Darah		9/1/2014	9/30/2	015
nc hc	hcl1	093	t004365	4 Derm	er, Brent Achlov		9/1/2014	9/30/2	015
hc	hc21	126	t004038	6 Davi	Julie		6/9/2014	9/30/2	015
hc	hc11	021	t004042	7 Calde	ron, Perla		10/1/2014	10/31/	2015
hc	hc11	108	t004386	5 Kaur,	Sukhjit		10/1/2014	10/31/	2015
hc	hc11	120	t004681	2 Du pr	e, Hunter		10/14/2014	10/31/	2015
hc	hcl1	104	t004180	3 Jacob	o-Castro, Eduardo		10/1/2014	10/31/	2015
hc	hc11	098	t004567	U Shrop	snife, Tyler Jes-Sepulveda, Lud	ia	11/1/2014	11/30/	2015
hc	hc21	119	t004695	2 Peraz	a Martinez, Jackelin	e	11/8/2014	11/30/	2015
							-, -,		
hc	hc21	136	t004753	8 Hend	erson, Matthew		11/14/2014	11/30/	2015
hc hc	hc21 hc11	136 004	t004753 t005010	8 Hende 3 Ruppe	erson, Matthew ert, Rebecca		11/14/2014 6/26/2015	11/30/ 12/31/	2015 2015
hc hc hc	hc21 hc11 hc11	136 004 131	t004753 t005010 t004702	8 Hende 3 Ruppe 1 Lopez	erson, Matthew ert, Rebecca , Anevay		11/14/2014 6/26/2015 12/6/2014	11/30/ 12/31/ 12/31/	2015 2015 2015

Delinquency								
Property	Туре	Unit	Code	Name	Owed	Office Phone	Home Phone	
hc - Hidden Creek Apartments LLC	C hc11	002	t0041057	Reyes, Ayaceli	4,530.56			
hc - Hidden Creek Apartments LLC	C hc11	002	t0041778	Carranco, Michelle	2.00		(831)707-0169	
hc - Hidden Creek Apartments LLC	hc21	003	t0043934	Reyes Rivas, Jose Juan	785.01		(831)854-8598	
hc - Hidden Creek Apartments LLC	hc21	003	t0046792	Brereton, Adeline	197.50		(408)249-8886	
hc - Hidden Creek Apartments LLC	C hc21	003	t0050504	Cienfuegos, Rony	100.00		(831)431-9608	
hc - Hidden Creek Apartments LLC	C hc21	005	t0023122	St. Pierre, Elise	-1.00		(831)818-8373	
hc - Hidden Creek Apartments LLC	C hc11	006	t0035317	Nunez, Asuncion	-8.00		(831)426-1870	
hc - Hidden Creek Apartments LLC	hc21	009	t0042632	Maxey, Crystal	-5.00		(510)541-6740	
hc - Hidden Creek Apartments LLC	C hc11	010	t0050301	Brauzman, Irina	-1,705.00		(916)342-8632	
hc - Hidden Creek Apartments LLC	hc21	020	t0049275	McCourt, Chiara	4,110.00		(831)331-9055	
hc - Hidden Creek Apartments LLC	C hc11	023	t0039645	Winters, Irma	-1.00		(831)334-1941	
hc - Hidden Creek Apartments LLC	C hc21	024	t0046789	Charles, River	9.97		(707)227-9881	
hc - Hidden Creek Apartments LLC	C hc11	027	t0050211	Nguyen, Phuong	1,800.00		(831)685-3731	
hc - Hidden Creek Apartments LLC	C hc21	028	t0023153	Bollom, Sharla	-15.42		(831)435-0923	
hc - Hidden Creek Apartments LLC	C hc21	032	t0041933	Aguilar, Angela	0.18		(831)428-4809	
hc - Hidden Creek Apartments LLC	C hc41	033	t0036855	Padilla, Maria	-245.03		(831)427-9040	
hc - Hidden Creek Apartments LLC	hc11	037	t0042991	Schroeder, Thomas	-193.00		(831)423-1333	
hc - Hidden Creek Apartments LLC	hc21	038	t004/4/5	Gonzales, Jaime	-/5.00		(000)000-0000	
nc - Hidden Creek Apartments LLC	hc21	040	t0036908	Lopez, Markisha	-4.00		(831)535-2959	
nc - Hidden Creek Apartments LLC	hc11	043	tu039897	martinez, Sharlene	2,/00.00		(004)000 4:55	
hc - Hidden Creek Apartments LLC	hc11	043	t0040774	DeVares, Danette	-141.00		(831)239-4138	
hc - Hidden Creek Apartments LLC	C hc21	044	t0037552	Wanhala, Nicole	499.04			
hc - Hidden Creek Apartments LLC	C hc11	045	t0041697	Medina, Piedad (Julie)	1.00			
hc - Hidden Creek Apartments LLC	C hc11	046	t0049192	Sanchez, Faviola	21.12		(831)331-9346	
hc - Hidden Creek Apartments LLC	C hc21	048	t0036323	Arnold, KellyAnn	426.32		(831)454-8891	
hc - Hidden Creek Apartments LLC	C hc21	048	t0047559	Holman, Scott	-100.00		(301)694-8550	
hc - Hidden Creek Apartments LLC	C hc21	049	t0039873	Miranda-Acosta, Janet	-4.00		(831)325-5912	
hc - Hidden Creek Apartments LLC	hc11	052	t0000149	Coleman, Craig	-199.00		(831)426-0410	
hc - Hidden Creek Apartments LLC	hc21	055	t0010726	Gonzales, Carmen	4.50		(831)325-5069	
hc - Hidden Creek Apartments LLC	hc21	057	t0040329	Gonzales, Griselda	1,506.86		(831)713-0333	
hc - Hidden Creek Apartments LLC	hc11	058	t0000155	Campbell, Judy	-7.50		(831)469-3933	
hc - Hidden Creek Apartments LLC	hc11	059	t0046763	Oraby, Shereen	1,680.00		(831)239-6653	
hc - Hidden Creek Apartments LLC	C hc11	060	t0028439	Rock, Kathy	-10.00		(831)425-4778	
hc - Hidden Creek Apartments LLC	hc21	061	t0035795	Ford, Maureen	61.00		(831)227-5107	
nc - Hidden Creek Apartments LLC	nc11	062	t0035576	Zhang, Linna	-1/1.00		(831)24/-8915	
nc - Hidden Creek Apartments LLC	nc11	064	t0050355	Berdeja, Andres	-1,/50.00		(760)940-8711	
hc - Hidden Creek Apartments LLC	ncl1	065	t0042587	Cortez-Suarez, Alberto	-/5.00		(831)316-8884	
hc - Hidden Creek Apartments LLC	hcl1	066	t0038273	Hudson / M, Debbie	583.48			
nc - Hidden Creek Apartments LLC	ncii	069	t0040763	De La Paz, Edit	403.80		(004) 604 0506	
hc - Hidden Creek Apartments LLC	hcl1	070	t0046382	Hoy, Ashley	-51.6/		(831)684-2526	
nc - Hidden Creek Apartments LLC	ncii	0/1	t0038540	Rivas, Alejandra	4,911.16	(004)407.0040	(831)431-/501	
nc - Hidden Creek Apartments LLC	- ncii	073	10000170	Fargason, Kobert	3,346.68	(831)427-0948	(004)005 0500	
nc - Hidden Creek Apartments LLC	ncii	074	t0045613	Guerrero-Hernandez, Juan	50.00	(004)464 0060	(831)295-9508	
nc - moden Creek Apartments LLC	- ncii	078	100329/6	winiamis/M, Kari	2,300.82	(031)404-9902	(031)/13-5836	
IIC - Huden Creek Apartments LLC	- ncii	0/8	10049105	Guo, rizhou	-3,190.00		(200)427-4863	
nc - Huden Creek Apartments LLC	- ncií	080	10020998	Queary, BIIIY	2,/51.1/		(001)400 4547	
nc - Huden Creek Apartments LLC	- ncii	082	1004/98/	Waddie, Jenna	-310.00		(031)428-454/	
nc - Huden Creek Apartments LLC	_ ncii	083	1003/217	Garcia, Koberta	1 201 50		(001)600 0776	
nc - Huden Creek Apartments LLC	- ncii	090	10034798	marysa/M, Michael	1,391.59		(031)600-8776	
nc - Hidden Creek Apartments LLC	ncii	095	10050066	Gonzalez, Kenato	-51.67	(004)450 6000 4405	(831)466-6248	
nc - Hidden Creek Apartments LLC	nci1	096	t0031994	Manone/M, Eryca	2,898.00	(831)458-6020 X4105	(004)500 3443	
nc - Hidden Creek Apartments LLC	nci1	101	t000/429	Alvarado, Ignacio	-246.00		(831)539-7447	
nc - Hidden Creek Apartments LLC	ncii	104	t0041803	Jacobo-Castro, Eduardo	-1.00		(831)419-8/11	
nc - Hidden Creek Apartments LLC	nci1	105	1003/413	moreno-Ferias/F, Laurie	1,960.85	((50)(30) 3000		
nc - Hidden Creek Apartments LLC	ncl1	105	tuu41326	wier, Joseph	1,582.77	(650)6/6-/993	(004)404 8000	
nc - Hidden Creek Apartments LLC	ncl1	106	tuu42870	Aldana-Martinez, Maria Luisa	4/3.91		(831)431-7932	
nc - Hidden Creek Apartments LLC	hc21	109	tu004601	wen, Jia Ya	-304.00		(831)295-0507	
nc - Hidden Creek Apartments LLC	hc21	111	tu000207	vences, Sandra	-62.00		(831)466-6797	
nc - Hidden Creek Apartments LLC	hc11	118	tu000214	Wu, Ise Chuan	728.65		(
hc - Hidden Creek Apartments LLC	hc21	121	t0040480	Franco-Winters, Josefina	24.00		(831)466-6781	
hc - Hidden Creek Apartments LLC	hc21	124	t0045909	Ramos-Hernandez, Eduardo	-0.73		(831)430-8320	
hc - Hidden Creek Apartments LLC	C hc21	128	t0036326	Franco, Judith	-232.80		(831)713-0665	
hc - Hidden Creek Apartments LLC	Chc21	130	t0047602	Mo, Jianbin	-2,250.00		(831)247-8915	

Pending Work Requests								
Property	Unit	Code	Description	Total	Called	Sched Date		
hc	134	209747	broken water shut off	0	5/29/2015 10:50:00 AM			
hc		213187	brown wood rail woods	0	7/20/2015 10:45:27 AM			
hc	094	213475	frige shelves/ ceiling fan	0	7/24/2015 1:50:00 PM			
hc	020	213574	re-key	0	7/27/2015 9:15:11 AM			
hc		213592	laundry cart	0	7/27/2015 10:17:45 AM			
hc		213577	pool light	0	7/27/2015 9:32:45 AM			
hc	113	213784	repair sreen	0	7/29/2015 10:44:36 AM			
hc	111	213785	hose bib	0	7/29/2015 10:46:09 AM			
hc	124	213800	weather strip	0	7/29/2015 1:51:32 PM			
hc		213846	sign on berry gate	0	7/30/2015 10:15:39 AM			
hc	121	213848	garbage disposal/tub	0	7/30/2015 10:28:03 AM			
			Pending Work R	equests	: 11			



Deposit Accounting in Voyager

Once a resident vacates or an application is cancelled, this resident or prospect will appear in the deposit accounting field under resident activity on the Yardi dashboard:

•	Community Manager Dashboard -	Hidden	C
	Resident Activity		
	Move In	<u>6</u>	
	Move Out	<u>6</u>	
	Deposit Accounting	<u>2</u>	
	On Notice	<u>6</u>	
	Expiring Leases (120 days)	22	
	Scheduled Lease Renewals	0	
	Alerts	<u>29</u>	
	Maintenance		
	Pending Make Ready	<u>8</u>	
	Pending Work Requests	<u>11</u>	
	Completed WO Followup	0	

To see the residents in deposit accounting, you can click on the number next to deposit accounting on the dashboard and a list will populate below:

Community Mana	ager Dash	board - Hidden Creek A	Apartments LLC	2			DB
Resident Activity		Uni	t Statistics			Wednesday, September 09, 2015	
Move In Move Out Deposit Accounting On Notice Expiring Leases (120 Scheduled Lease Ren Alerts Maintenance	days) ewals	6 Total 5 Leas 2 Occu 5 Avail 22 Mode 29 On H Unit Unit	Units ed Units pied Units able Units e!/Down/Admin old Units Transfers	<u>146</u> <u>146</u> <u>144</u> 2 0 0 0	100% 98.63% 1.37% 0% 0%	Prop/List hc Add Guest Quick Gue Leasing Specials Daily Activ Hot Sheet Monitor Repor New PQ New Svc. Re Crist Labora	est ity ts q.
Pending Make Ready Pending Work Reques Completed WO Follow Calendar Dep	sts vup posit Accou	8 11 0 Pros Toda On 1 Pend Pend Pend	ffic pect Pipeline ay's Showings Vaitlist ding Applications Person Search		1 0 17 21	Open Batches Charges New Charge Batches Receipts New Receipt Batches Payables New Payable Batches	ch ch ch
Move Out Date 🔺	Unit	Resident	Deposit	Clear Applicant			
07/27/2015	003	Adeline Brereton	neetg				
	1	(c)					



Deposit Accounting in Voyager

mates Alana Mandrick, Roxanna Gutierrez

The security deposit will automatically be credited at the top of this list and any current unpaid charges on the resident ledger will automatically be deducted at the top of this list.

Forwarding Address						
Address	200 Button Street					
	Apartment 92					
City	Santa Cruz					
State	CA					
Zip	95060					
Zip	95060					

Input the forwarding address

In this screen, also input all charges to be deducted from the security deposit by typing a brief description of each charge into the description field next to the automated general description and typing the monetary amount for each charge into the charge amount field next to this:

Individual charges will vary by resident and property.

In this screen, also input any credits you would like to credit back to the deposit by typing a brief description of each credit into the description field next to the automated general description and typing the monetary amount for each credit into the credit field next to this:

es/No	Chg Code	Description	Charge Amt	Credit
	rent	Rent 07/28-07/30/2015	197.50	
	deposit	:Security Deposit credit	0	1,975.0
	rent	Rent (07/2015) Credit 4 days	0	197.5
	rent	Rent	0	0.0
	late	Late fee	0	0.0
	nsf	NSF fee	0	0.0
	hud	HUD	0	0.0
	secexh	Transfer to Unit:	0	0.0
	term	Lease Termination Fee	0	0.0
	depfor	Deposit Forfeiture	0	0.0
	appl	Application Fee	0	0.0
	util	Utilities	0	0.0
	clean	Cleaning Fees	0	0.0
	carpet	Carpet Charges	0	0.0
	mopaint	Painting Fees	0	0.0
	depint	Deposit Interest	0	0.0
	modamage	Damage Fees	0	0.0
	modamage	Damage Fees	0	0.0
	modamage	Damage Fees	0	0.0
	modamage	Damage Fees	0	0.0
	modamage	Damage Fees	0	0.0
	modamage	Damage Fees	0	0.0
	modamage	Damage Fees	0	0.0
	modamage	Damage Fees	0	0.0
	modamage	Damage Fees	0	0.0
	modamage	Damage Fees	0	0.0
	modamage	Damage Fees	0	0.0
	modamage	Damage Fees	0	0.0
	modamage	Damage Fees	0	0.0
	modamage	Damage Fees	0	0.0
	modamage	Damage Fees	0	0.0
	momisc	Miscellaneous Fees	0	0.0
	momisc	Miscellaneous Fees	0	0.0
	momisc	Keys/Remotes not Returned	0	0.0
_		Totals:	197.50	2,172.5
		Amount of refund	1,975.00	
		Amount owed	0.00	

	momisc	Miscellaneous Fees	0	0.00			
	momisc	Miscellaneous Fees	0	0.00			
	momisc	Keys/Remotes not Returned - Gate Remote	0	50.00			
		Totals:	197.50	2,272.50			
		Amount of refund	2,075.00				
		Amount owed	0.00				
Print Statement Post Help							

Deposit Accounting in Voyager

Once all charges and credits are entered, double check that the check mark next to each charge or credit item is checked:

The charges and credit will not be applied to the deposit accounting if the box next to them is unchecked.

Once all charges and credits are entered and checked, check the print statement box and click post:

> Click the print icon to print the completed move out statement

If changes, such as additional charges or credits, need to be made to the deposit accounting after the above steps have been completed, click on the adjust deposit accounting link in the resident screen under functions on the dropdown menu on top:



From here additional charges or credits can be entered as in previous steps, with the addition of clicking on the box to the right of the charge code field to open a popup to choose a charge code from by checking the box next to the desired code and clicking ok

djust Deposit Accounting			
ode t0046792	Property hc L	ease From 10/09/2014	+
ame Adeline Brereton	Unit 003 L	ease To 07/31/2019	;
ddress 200 Button Street	Status Past M	love In 10/09/2014	
Apartment 92	Rent 1,975.00 M	love Out 07/27/2015	;
Santa Cruz, CA 95060	Telephone (408) 249-8886(H)		
Forwarding Address			
ddress	_		
	_		
у	_		
ate	_		
ip			
oommates Alana Ma	idrick, Roxanna Gutierrez		
urrent Refund Amount 1,905.00		-	
Cng Code	Description	Charge Amt	Credit
		-	0.00
			0.00
<u> </u>			0.00
<u> </u>		0	0.00
		0	0.00
	Tot	als: 0.00	0.00
	Amount of ref	and 1,905.00	

Email PDF to Accountant letting them know it is ready for review. Must be completed within 10 days of move-out or cancelation.

*Please let the Accountant know whether to mail the refund to their old site address for forwarding or to the Leasing Office for pickup.

modamage	Damage Fees: Broken Window	100.00	0.00
modamage	Damage Fees: Hole in Bedroom Wall	50.00	0.00
modamage	Damage Fees: Damaged Kitchen Light Fixture	20.00	0.00
modamage	Damage Fees	0	0.00
modamage	Damage Fees	0	0.00

	Amount of refund	1,905.00	
	Amount owed	0.00	
Print Statemen			
Post	Help		

Roles Analytics Reports	Code		Move Ou	it Statemer				
 Roles Analytics Reports 	Code			it btutteniei	10			Date: 00/00/3
Analytics Reports	Code							Date: 03/03/2
Reports		t0046792	Property	hc		Lease From	10/09/2014	
A Devidential	Name	Adeline Brereton	Unit	003		Lease To	07/31/2015	
 Residential 	Address	200 Button Street	Status	Past		Move In	10/09/2014	
Unit Pricing		Apartment 92	Rent	1 975 00		Move Out	07/27/2015	
Revenue Management	CPV	Santa Court. CA 95060	_	1,000		Notice	06/15/2015	
) Charges	Tolophano					10000	00/13/2013	
- Dessivables	relegatorie	(U)-() - (H)-(408) 249-8886						
Receivables	Date	Description			Charge	Payment	Balance	Chg/
 Payables 		Balance as of 7/01/2015				,	(1,316.67)	
 SF Accounting 	07/01/2015	5 Rent (07/2015)			1,975.00	0.00	658.33	1892
Setup	07/02/2015	5 chk# PSID69600832 Web PSID 6960	00832 - ACH		0.00	658.33	0.00	1391
Administration	07/27/2015	i :Security Deposit credit			-1,975.00	0.00	(1,975.00)	1900
	07/27/2015	Rent (07/2015) Credit 4 days			-197.50	0.00	(2,172.50)	1900
 Service Request 	07/27/2015	S Damage Feet- Broken Mindow			-30.00	0.00	(2,222.50)	1900
 Unit Asset 	07/27/2015	E Damage Ferst Liele in Bedresse Wal			100.00	0.00	(6/166-00)	4.500
	10//2//2015	1 Damage Pees, Bole in Degroom years			50.00	0.00	(2.072.50)	1900
	07/27/2015	Damage Fees: Damaged Kitchen Lig	ht Fixture		50.00 20.00	0.00	(2,072.50) (2,052.50)	1900
	07/27/2015	5 Damage Fees: Damaged Kitchen Lig i Keys/Remotes not Returned - Gate F	ht Fixture Remote		50.00 20.00 -50.00	0.00 0.00	(2,072.50) (2,052.50) (2,102.50)	1900 1900 1900
	07/27/2015 07/27/2015 07/27/2015	Damage Rees: Note in Bedroom war Damage Rees: Damaged Kitchen Lig Keys/Remotes not Returned - Gate R Amount to be refunded	ht Fixture Remote		50.00 20.00 -50.00 1,905.00	0.00 0.00 0.00 0.00	(2,072.50) (2,052.50) (2,102.50) (197.50)	1900 1900 1900 1900

Deposit Accounting in Voyager

1. Everyone should be using the FG Walk Sheet. We have set standard charges for cleaning and damages are open. Please note that this must be completed with each move out including the top portion and then scanned into Yardi by the time the deposit accounting is completed. Additionally, move out photos must be taken for any charges that are noted. This will also simplify questions accountants may have on charges as they can reference this form when reviewing the SODA.

2. With the walk sheet in place, there will be NO Adj Dep Accting changes done when bills are received, and charges are slightly higher or lower than estimated. We have started charging back based on estimated charges for a number of reasons- to avoid having to do additional work in correcting charges that aren't accurate to the dollar as well as an effort to minimize resident frustration when we send bills for amounts due several weeks after move out due to invoicing delays. This means that at times we will have to absorb additional charges that were missed on the walk sheet, but we think it is worth it for the time saved in making the adjustments, as well as the customer satisfaction when we send one final move out statement within 2-3 weeks of move out.

3. The only time you will Adjust Deposit Accounting is when a charge was missed or underestimated by more than \$100. So, if carpet replacement was estimated at \$500 but really was \$700, you can do a 1-time Adjust Dep Accounting for the \$200 undercharged. This should happen VERY rarely if your walk sheets have accurate pricing for each floorplan. Only ONE adjustment is permitted, so if you do discover another missed charge of more than \$100 on the same dispo, we can't add another charge and send out a third MO Statement as it is just not fair to the resident.

Deposit Accounting in Voyager

4. When entering payables, you should continue to use the chargeback stamp, but you will be noting the estimated charge added for this item per the walk sheet.

5. Please include the Walk Sheet in all Deposit Accounting emails, and only send ONE move out statement per email to your Accountant to review for resident move outs.

6. You can save MO photos to a Word doc and upload to Yardi that way instead of messing with a PDF

7. When completing dispos, you might consider using a template via Gmail which includes the following info:

Lease fulfilled?

Any special situations with this resident?

Notice vs Eviction vs skip vs transfer

Chargebacks for cleaning/damage added?

Utilities have been confirmed they were in the resident's name until their MO date

All of the following docs uploaded in Yardi for balances due:

- i. Application
- ii. ID
- iii. MI Checklist
- iv. Lease
- v. Vacating Procedures
- vi. MO Photos for any damage

8. Once approved, Accountants will save any Balance Due MO Statements along with the Balance Due notice (saved as one PDF) in the Resident Attachments in Yardi.

FCO Collections Interface

From the Resident Screen, click the Collections Interface link in the Data menu:

YARDIVOYAG	ER										
Hom	e Help Pror	ation Calc Sign	Out								
	Resident			Function	. •	Data 🔻		Reports	•		
 Roles Analytics Reports Residential Unit Pricing Revenue Management Charges Receivables Payables SF Accounting Setup Administration Service Request 	First Name Last Name Address City-St-Zip E-mail Alt. E-mail Office Home FAX Mobile Save Lease Info	Song Jin 157 Indian SW Apartment #1 Grand Rapids dix0518@gmail.cor dix0518@gmail.cor dix0518@gmail.cor dix0518@gmail.cor dix0518@gmail.cor Mew New Deposit In	MI 49504	rges C	Propert Resident I Property Unit Prospect Status Legal Payment M Payable Mu Late Court	Lease Room Attach Memo Conta Email Iethod ethod ant = 3	Charges mates (1) ment (11) (3) tt Month T N/A Any Check	o Month	EFT Se Recurr Reside Applica Manag Make F	tup ing Payment Setup int History ation Form e Rentable Items Ready	New WO Billing & Payments Interface <u>Collections Interface</u> Renters Insurance Interface Revenue Management Rent Bill Control
	Lease In Mkt. Rent Due Day Move In Approval Da Lease From Lease To Last Renewa	formation 749.00 1 09/05/2014 te 08/15/2014 03/01/2015 06/30/2015 te 03/02/2015	Rent Other Charges Total Charges Notice Move Out Lease Desc Responsibility Date	834.00 85.00 919.00 09/01/201 11/05/201 N/A	Ba Gi 21 5 21 5 M 5 M 5/ M	Late Fee ase % race Period nd % nd Grace ax % (day ax # Days inimum Due	10.00 4 0.00 0 0.00 5.00 0 100.00	% M	onthly Ren wed-total wed-total	t V V	

Click NEW:

		J 8							
(Collections	History for Song Jin							
	New		Coll	ections Agency	FCO		¥		
	Collections Status	Notes	Marked For Collections	Date Sent To Collections	Agency	Amount Sent	Date Canceled	Attachments	Edit

Set Collections Status to READY & click SAVE

https://www.yardiasp13.com/16656first/Pag Edit Collections	ges/itfEditCollecti		
Collections Status Ready V Notes: Collected Update			
Save Close			

FCO Collections Interface

Then Close the Edit Collections window.

Refresh Collections History window, then click on the ATTACHMENTS link.

History for Song Jin							
	FCO	FCO T					
Notes	Marked For Collections	Date Sent To Collections	Agency	Amount Sent	Date Canceled	Attachments	Edit
	06/01/2016		FCO	0.00		<u>0/11</u>	
	Notes	Collections 06/01/2016	Collections Agency Notes Marked For Collections Date Sent To Collections 06/01/2016 06/01/2016	Notes Marked For Collections Date Sent To Collections Agency 06/01/2016 FCO	Notes Marked For Collections Date Sent To Collections Agency Amount Sent 06/01/2016 FCO 0.00	Notes Marked For Collections Date Sent To Collections Agency Amount Sent Date Canceled 06/01/2016 FCO 0.00	Marked For Collections Date Sent To Collections Agency Amount Sent Date Canceled Attachments 06/01/2016 FCO 0.00 0/11

Select the attachments that should be uploaded for FCO, then click SAVE.

Documents to Upload to FCO: Applications Copy of ID(s) Vacating Procedures Move-In/Move-Out checklist Any Invoices that were charges back Statement of Deposit Accounting Lease

/ardi Syst	ems, Inc Collections Attachments - Google Chrome			
https://	/www.yardiasp13.com/16656first/Pages/itfCollectionsAttach	nments.aspx?ID=2&TenantId=91312&hVendor=43		
ollectio	ns Attachments			
<u>S</u> ave	Close			
Attach	Description	Attachment	Туре	Attached Date
	9623C PET.pdf	9623C PET.pdf		05/20/2015
	TO-9623C-Fracker Application.pdf	TO-9623C-Fracker Application.pdf		05/27/2016
	TO-9623C-Fracker ID.pdf	TO-9623C-Fracker ID.pdf		05/27/2016
	TO-9623C-Jin Application.pdf	TO-9623C-Jin Application.pdf		05/27/2016
	TO-9623C-Jin ID.pdf	TO-9623C-Jin ID.pdf		05/27/2016
	TO-9623C-Jin_Fracker Lease 03-01-15-06-30-15.pdf	TO-9623C-Jin_Fracker Lease 03-01-15-06-30-15.pdf		05/27/2016
	TO-9623C-Jin_Fracker Move-In Checklist & Make Ready Checklist.pdf	TO-9623C-Jin_Fracker Move-In Checklist & Make Ready Checklist.pdf		05/27/2016
	TO-9623C-Jin_Fracker Vacating Procedures.pdf	TO-9623C-Jin_Fracker Vacating Procedures.pdf		05/27/2016
	TO7DayNotice_t0046583_07072015.pdf	T07DayNotice_t0046583_07072015.pdf		07/07/2015
	TO7DayNotice_t0046583_08102015.pdf	T07DayNotice_t0046583_08102015.pdf		08/10/2015
		T07D=:///stics_10046583_00083014_sdf		00/00/2014

That it! Now FCO will grab the info they need from Yardi since the account is marked "Ready".

Generating Demand Notices in Voyager

Navigate from the side menu: Reports→ Resident→ Residential Correspondence

•	Community Manager Das	hboard - Hidden (Creek
Deles	Resident Activity		U
Roles	Move In	<u>6</u>	То
Analytics	Move Out	<u>6</u>	Le
Reports	Deposit Accounting	1	Oc
Residential	Property	• <u>6</u>	Av
Unit Pricing	Property - Residential	• <u>22</u> 0	Mo
Revenue Management	Market Survey	28	Or
Charges	Unit	•	Un
Dessivebles	Vendor	Directory	
Receivables	Desident	Directory	
Payables	Resident	Residential Correspond	ence
SF Accounting	Receivables	Lease Charges	bi
Setup	Traffic	Tickler	Pe
Administration	Payable	Renewal Rent Override	
Service Request	Owner	Tenant Memos	
Unit Asset	Financial	Tenant Charges	-
	Registers	Tenant Receipts	
	Service Request Reports	Tenant Prepay	
	Recurring Service Request Reports	Ledger	
	Asset Reports	3 Day Notice	he
	Conductor	E Day Notice	
	SOL Reports	Day Notice	
		Roommate Directory	

Input property, post both month fields to the current month, document date to the date of the notice, amount owed to the amount of the late fee, and select status and current and notice, category as resident statement, and report type as 3 day notice (days vary by site), and check show on portal, then click display:



Once a list of residents generates below, click generate documents

•	Residential	Correspon	dence									
	Resident Filte	r				Create/ Em	ail Document	s				
+ Roles	Property	et				Category	Resident	Statement 🔻	1			
Analytics	Unit Type					Report Type	ET 3 Day	Notice V				
Reports	Unit					Print Blank			1			
Residential	Resident					Display Char	e Codes	_	1			
• Unit Pricing	Having Charges					Leare Charge	e Month		1			
Revenue Management	Proving charges					Tealuda All La						
Charges	Post Month	07/2015	_	07/2015		Include All Le	ase noiders					
Receivables	Trans From Dat	e		:0		Roommate Ty	/pe	Roommate				
Payables	Move In			:0				Guarantor				
· rayavies	Move Out			:0			Generate Do	cuments				
• SF Accounting	Lease From Dat	e		:0		Attach Docun	nents					
• Setup	Lease To			:0		Show on Port	al					
Administration	Document Date	09/09/20	15			Moree Decum	ai	10 0005 C				
Service Request	Amount Owed			:0		Merge Docum	ients in Sing	ie PDP				
• Unit Asset	Statue	Current				Mark Documents as "Copy"						
	50003	Past	- ^			Publish to Sh	Sharepoint Proposal Only					
		Future	*			Best Value Pr						
							Email Docu	uments				
	Display	<u>P</u> DF	Excel	Clear		Resend Docu	ments					
						Do	ocuments with	No Email Id				
	Property: et		1									
	Property	Unit Type	Unit	Resident Code	Reside	ent Name	Status	Rent	Deposit	Lease From	Move In	Lease To
	et	et2a1	01-27525	t0122174	Medina Norri	s	Current	592.00	149.00	04/23/2015	05/28/2010	01/31/2016
	et	et2a1	01-2754S	t0122175	Thierno Diop		Current	605.00	99.00	03/13/2015	03/01/2006	03/31/2016
	et	et2a1	01-27565	t0122176	Model Model		Current			01/01/2014	09/18/2013	12/27/2014
	et	et2a2u	01-27625	t0122178	Tesla Casey		Current	700.00	400.00	06/25/2015	12/28/2012	12/31/2016
	et	et2a2	01-2764S	t0122179	Jason McColl	um	Current	637.00	99.00	12/06/2014	11/10/2007	08/31/2015
	et	et2a2u	01-2766S	t0122180	Kameisha Bo	nd	Current	657.00	200.00	11/12/2014	09/13/2013	05/31/2016
	et	et2a1	01-27705	t0122181	Kenya McCor	ď	Current	640.00	625.00	03/20/2015	01/03/2014	03/31/2016
	et	et2a1	01-27725	t0122182	Kimberly Pag	le	Current	607.00	832.00	11/26/2014	10/04/2013	05/31/2016
	et	et2a1	01-2774S	t0122183	Jhonayra Brit	to	Current	620.00	400.00	06/16/2015	03/15/2014	11/30/2015

Generating Demand Notices in Voyager

A statement link will generate on the resident list below:

	Residential	Correspor	ndence											
	Resident Filter					Create/ En	ail Document	ts						
• Roles	Property	et				Category	Resident	Statement	•					
 Analytics 	Unit Type					Report Type	ET 3 Day	Notice	•					
 Reports 	Unit					Print Blank								
 Residential 	Resident					Display Char	ae Codes							
• Unit Pricing	Having Charges					Lease Charge	s Month							
• Revenue Management	Post Month	07/2015		to 07/2015		Include All L	ase Holders							
Charges	Trans From Date	07/2015		to		Roommate T	vne	Poormato						
Receivables	Move In			to				Spouse	<u> </u>					
Payables	Move Out			to				Guarantor	•					
 SF Accounting 	Loose From Date			to			Generate Do	<u>c</u> uments						
• Setup	Lease From Date	·				Attach Docur	nents							
Administration	Lease To			to		Show on Por	.al							
Service Request	Document Date	09/09/20	15			Merge Docur	ients In Sing	le PDF						
Unit Accet	Amount Owed			to		Mark Docum	nts as "Cop	у"						
· Onic Assec	Status	Current				Publish to Sh	arepoint							
		Future	*			Best Value P	oposal Only							
							Email Docr	uments						
	Display	PDF	Excel	Clear		Resend Docu	ments							
			-			D	ocuments with	No Email Id						
	Property: et													
	Property	Unit Type	Unit	Resident Code	Resident	Name	Status	Rent	Deposit	Lease From	Move In	Lease To	Move Out	Statement
	et e	et2a1	01-27525	t0122174	Medina Norris	c	urrent	592.00	149.00	04/23/2015	05/28/2010	01/31/2016		Statement
	et e	et2a1	01-2754S	t0122175	Thierno Diop	C	urrent	605.00	99.00	03/13/2015	03/01/2006	03/31/2016		Statement
	et e	et2a1	01-2756S	t0122176	Model Model	C	urrent			01/01/2014	09/18/2013	12/27/2014		No Invoices to print
	et	et2a2u	01-2762S	t0122178	Tesla Casey	C	urrent	700.00	400.00	06/25/2015	12/28/2012	12/31/2016		Statement
	et e	et2a2	01-2764S	t0122179	Jason McCollum	0	urrent	637.00	99.00	12/06/2014	11/10/2007	08/31/2015		Statement
	et e	et2a2u	01-2766S	t0122180	Kameisha Bond	C	urrent	657.00	200.00	11/12/2014	09/13/2013	05/31/2016		Statement

Click on the statement link next to each resident and a pop up with the 3-day notice for that resident will appear:

	Brentwood Lake APARTMENTS NOTICE TO LEAVE THE PREMISES
To: Medina I	vorris, and all other occupants:
We city of Reyno	wish you to leave the following described premises now in your occupation, situated in the ldsburg, County of Fairfield, State of Ohio, and described as follows:
Brentwood L 2752 John St Reynoldsburg	ake Apartments even Way g. OH 43068
together with	the lot of land which said unit is situated.
Grounds:	Non Payment of Rent
ONLY CER YOUR REN	TFIED CHECK, CASHIER'S CHECK, OR MONEY ORDER WILL BE ACCEPTED FOR FAL PAYMENT INCLUDING ALL LATE FEES.
Your compli legal measure	ance with this notice on or before the third day from the date listed below will prevent any e being taken by us to obtain possession.
YOU ARE EVICTION	BEING ASKED TO LEAVE THE PREMISES. IF YOU DO NOT LEAVE, AN ACTION MAY BE INITIATED AGAINST YOU. IF YOU ARE IN DOUBT G YOUR LEGAL RIGHTS AND OBLIGATIONS AS A TENANT, IT IS

If you are unsure if you do want to issue a 3-day notice to a resident, you may need to open Yardi in a

second tab (Click "Ctrl" & "N" together) and look at the resident's ledgers to assess if they do require a 3-day notice.

Click the print icon to print all 3-day notices you will issue to residents.

Generating Resident Documents

1. Go to Reports -> Resident -> Residential Correspondence

	Community Manager Date	shboard - Hidden Cre	ek Apartments LLC			DB Ca
 Roles Analytics Reports Residential Unit Pricing 	Resident Activity Move In Move Out Denosit Accounting Property Property - Residential Market Survey	6 6 1 6 22 0 28	Unit Statistics Total Units Leased Units Occupied Units Available Units Model/Down/Admin On Hold Units	<u>146</u> <u>146</u> <u>144</u> <u>2</u> 0 0	100% 98.63% 1.37% 0% 0%	Wednesday, Septembe Prop/List hc Add Guest Leasing Specials Hot Sheet
Revenue Management Charges Receivables	Unit Vendor	▶ 8 Directory	Unit Transfers	0		<u>New PO</u> <u>Print Letters</u>
 Payables SF Accounting 	Resident Receivables	Residential Correspondence Lease Charges	Prospect Pipeline Today's Showings Dn Waitlist		<u>1</u> 0 <u>17</u>	<u>Charges</u> <u>Receipts</u>
• Setup	Traffic	Tickler	Pending Applications		<u>21</u>	Payables

2. In order to see all the "Report Types" you must clear everything out of the "Property" box.

3. Once the "Property" box is clear, use the drop down next to "Report Type" To pick the report you want. Also make sure the "Category" is set to "Resident Statement".

4. Fill out any of the other areas you would like to specify the report to draw.

5. The VERY last step should be to enter the "Property".

Once you enter the property, do not click anywhere but on the button "Display".

•	Residential Co	orrespondence				
	Resident Filter				Create/ Em	nail Documents
• Roles	Property				Category	Resident Statement 🔻
 Analytics 	Unit Type				Report Type	AR 24 Hour Notice 🔻
 Reports 	Unit				Print Blank	AR 24 Hour Notice
 Residential 	Resident				Display Charge	AR 7 Day BW 24 Hour Notice
• Unit Pricing	Having Charges				Lease Charges	BW 3 Day Notice
• Revenue Management	Post Month	07/2015		t0 07/2015	Include All Lea	BW Balance Notice BW Letter
• Charges	Trans From Date	07/2015	-	to	Roommate Typ	BW Pay Arrangement
• Receivables	Maus In				Roominate Typ	CB Credit Notice
• Pavables	Move In					CB Regional Letter
SE Accounting	Move Out			to	(CR Balance Notice CR Credit Notice
Satur	Lease From Date			to	Attach Docume	CR Regional Letter
Administration	Lease To		1	to 📰	Show on Porta	ET 3 Day Notice
Administration	Document Date	09/09/2015	Ē		Merge Docume	ET Balance Notice
Service Request	Amount Owed		t	to	Mark Documen	HC 3 Day Notice
• Unit Asset	Status	Current			Publish to Shar	HC Balance Notice Letter
		Past			Rest Value Pro	nosal Only
		Tuture				Each December
			_			Email Documents
	Display	<u>P</u> DF <u>E</u> xcel		Clear	Resend Docum	ents
					Doc	uments with No Email Id

Generating Resident Documents

6- Once you hit 'Display', you may have to wait a few minutes for all documents to render below .

7- Once they show and you're ok with the selections, click the "Attach Documents" and the "Show on Portal"

8- Click 'Generate Documents' – this will load all the letters next to the residents.

9-Click on the 'Statement' link for each resident to print.

YARDIVOYAG	iER														Site Sea	rch
н	ome Help Pro	ration Calc	Sign Out												* -	() -
	Residential	Correspo	ndence													
 Roles Analytics Reports Residential Unit Pricing Revenue Management Charges Receivables Payables SF Accounting Setup Administration Service Request Unit Asset 	Resident Filter Property Unit Type Unit Resident Having Charges Post Month Trans From Date Move In Move Out Lease To Document Date Amount Owed Status Display	hc		to 07/201 to to to to to	5	Create/Eme Category Report Type Print Blank Display Charges Lease Charges Include All Lea Roommate Typ Attach Docum Show on Porta Mark Documer Publish to Sha Best Value Pro Resend Docum	A Documents with N	tatement Notice Roommate Spouse Guarantor uments e PDF hents ko Email Id		ŧ					ļ	
	Property: nc	Unit Type	Unit	Residen	t Reside	nt Name	Status	Rent		Deposit	Lease From	Move In	Lease To	Move Out	Stateme	nt
	hc h hc h	hc21 hc21	003	t0046792 t0050250	Adeline Brereton Heather Laforce		Past Canceled	1,975.	00	0.00	10/09/2014	10/09/2014	07/31/2015	07/27/2015	Statement Statement	
	hc r	ic21	003	t0050504	Rony Cienfuegos		Applicant	2,050.	00	1,950.00	08/08/2015	09/09/2015	08/31/2016		Statement	

1) From the Yardi home screen. Go to Setup->Unit->Review Unit.

Setup

- Administration
- Service Request
- Unit Asset
- Renters Insurance

Property	•
Unit	Paview Lloit
Rentable Items	Review Onit
System	Review Portal Unit Priorities
Duick Trans	Add Unit
	Review Floor Plan
	Add Floor Plan
	Copy Floor Plan
	Review Unit Types
	Add Unit Type

2) You will get this screen:

Unit				
Property				
Building				
Unit				
Unit Type				
Notes				
Display Rows 5	00			
	Submit	Clear	Help	

3) Enter the property code and unit number. Hit submit.

Updating Unit Notes in Yardi

Propert	Lake	Forest Apartment Ho	mes
Building			
Unit	03-301 03-30	01	
Unit Typ	e		
Notes			
Display	Rows 500	1	
	Submit <u>C</u> lear	Help	
 You will ge 	t this screen:		
Unit	03-301		
Address	3235 Softwater Lake Drive NE	Apt 301	
City	Grand Rapids		
State-Zip	MI 49525		
Country	us		
-			
Edit	New <u>C</u> lose	Help	
Occupa	ncy General Descr	intion Contact	re l
Occupa	itey General Descri	pron [contact	
Notes	Dovx-Grav cab, blk appliances, bl	ack	Image Linewailable
	counter tops, plank in entry/kitch	en/	Thage chavanable
	sining/haif bath.		
			1

Updating Unit Notes in Yardi

 Hit edit, and then you can edit the notes in the box with any detail you need. Once completed, hit save.

Unit		Functions 💌		
Unit 03 Address 32	3 <mark>-301</mark> 235 Softwater Lake Drive NE Apt 3	301		
City Gr State-Zip M Country us	and Rapids I ¥ 49525	~		
Save	<u>N</u> ew <u>C</u> lose <u>H</u>	elp		
Occupancy	General Description	Contacts		
Notes Onyx- count dining	Gray cab, blk appliances, black er tops, plank in entry/kitchen/ J/half bath.		Image Unavailable	
			<u> </u>	1 of 1

Manual Credit Card Payment Policy

- The One-Time Manual Credit Card Payment process should <u>ONLY</u> be used to make a partial payment for a resident who has a signed payment arrangement that has been approved by the Manager / Regional.
- All other payments should be made by the resident via their Resident Portal or at an authorized WIPS location. We <u>DO NOT</u> accept paper payments.
- All paper payments need a note as we should only be taking these in rare circumstances from residents.
- One-time manual credit card payments are performed in Voyager and should only be completed by a Manager or Assistant Manager.
- The Credit or Debit card the Resident is wanting to use for the payment <u>MUST</u> be added as a Payment Method through their Resident Portal.
- Resident is responsible for all fees associated with using their Credit or Debit Card. These fees are never waived.
- You must obtain a signed copy of the Credit Card Authorization form before processing any payments on the resident's behalf.
 - If the resident signs the form in the Office, you are required to scan a copy and save it to their CRM Attachments.
 - If the resident is not able to come into the Office to sign the Credit Card Authorization form, you are required to send the resident an email via CRM with the form as an attachment. The resident will be required to print, fill out, sign and send back replying to the email from CRM so that the email is linked to their resident account. You must then download the signed form and save as an attachment.

*Credit or Debit Card <u>N</u>	<u>1UST</u> be set up as I	Payment Method in your Resident Portal
Transaction A	mount: <u>\$</u>	
Payment type		(Partial Payment, Damages, Past Balance, etc.)
Last 4 Digits o	f Card Number:	
Cardholder's Information:		Tenant Information:
First Name:		First Name:
Last Name:		Last Name:
Billing Information (Address wh	ere statement is mailed):	Management Company: First Pacific Group, Inc
Address:		Property Address:
City:		Unit Number:
State:		Property City:
ZIP/Postal Code:		Property Zip:
E-Mail:		Phone Number:
Fees: *Debit Card: \$ \$ *Credit Card (3.95 per transaction le: 4.95 per transaction \$1 59.95 per transaction ov Visa/Master Card/AME	ss than \$1,000.00 ,000.00 up to \$1,999.99 er \$2,000.00 {/Discover: 2.5% of total transaction
, my card for the transaction am that I will not dispute this charg	the cardholder for the ount listed above for ag e through my credit car	credit card above, authorize First Pacific Group, Inc. to greed upon balance due. By signing this authorization, d company and fully authorize this charge.
ure:		Date:

Manual Credit Card Payment

In order to make a manual credit card payment, the resident **MUST** have the credit or debit card they are wanting to use as a **Payment Method** in their **Resident Portal**

The one-time manual CC payment is completed in Voyager. Navigate to the resident's profile. Click **Data** and then click **One-Time CC Payment**

Resident		Function 💌	Da	ata 💌	Reports 💌				Jum
First Name Middle Name Last Name	Latonia Ward		Ri Pi U	Attachments (49 Credit Card Setu EFT Setup	9) IP	Application Form Lease Charges Roommates (1)	Renters Insurance Interface Rent Bill Control NY Lead Paint	WIPS Setup Additional Lease Details NTV	5
Address	2680 John Steven Way		Pi Si	Email Memo (2) New WO		Manage Rentable Items Resident History Workflow	NY Bed Bug History NY Window Guard NY Lease Renewal	One-Time CC Payment]
City State Zip	Reynoldsburg 43068	он	Le	Recurring Payme Make Ready	ent Setup	Billing & Payments Interface Collections Interface	NY DHCR Registration NY SCRIE Subsidy		
Edit	<u>C</u> lose <u>H</u> elp								

This will bring up the **Credit Card Receipt** window. Enter the **Unit** number, **Payer** and click the **Display Type** dropdown and select **Standard Receipt Display** type. You will <u>not</u> use the Payer Name field so do not enter any information in that. Once all information is entered, click **Enter Detail**.

	Credit Card	l Receipt			4	i
	Property	eb	The Estates at Brentwood L			
	Unit	04-2680S	2680 John Steven Way Status=Past		ļ	l
	Payer	t0047781	Latonia Ward			
	Date Received	05/06/2019	Enter Detail			
	Display Type	Standard Rect 🔻]			
	Payer Name		_			
					÷	ļ
	4			•		ĺ

Select the **Preferred Payment Type** of **Credit** or **Debit**. Then select the card they are using from the **Existing Cards** drop down. Enter the Total Amount being paid and a **Detailed Note** regarding the payment being made. The **Exclude Service Fee?** Needs to remain selected **No** as we DO NOT waive the Service Fees for making CC payments. Confirm all information is correct and click **Save**.



Once the payment has processed, the screen will update at the top indicating the Payment was successfully Authorized and provide the Transaction ID, Ctrl Number and Batch Number. Verify the payment has hit the ledger and no further action is required.

Credit C	ard Receipt		
Your F Ctrl 1	ayment is Succe 779647 Batch 22	essfully Authorized. Credit Card Transaction 15801	1D: 41796246
			Preferred Payn
			Existing Cards
Property	eb	The Estates at Brentwood L	Total Amount



Mid Month Move out & Target Lease Expirations

Mid-month Move outs: Please remember *not* to manually adjust recurring charges for a mid-month move-out. Yardi will correct any prorating changes in the Deposit Accounting. If Yardi charges a full month's rent and you manually credit back a portion due to a mid-month MO, you will have to charge back the portion you credited after Dep Accting as Yardi will prorate the Credit in Deposit Accounting.

• Target Lease Expirations: When you are entering the "Lease To Date" on a Prospect Guest Card's Rental Options, please utilize the Lease Expiration Count link (under the Lease To Date) to see how many leases are ending around this lease. That way, if there are 25 leases ending in 12 months but only 5 leases ending in 13 months, you can encourage the resident to sign a 13-month lease, so the Lease Expirations are spread out more:

YARDIVOYAG	ER					Site Search
Но	ome Help Proration (Calc Sign Out				* - 0 -
	Prospect Guest Ca	ard				
 Roles Analytics Reports Residential Unit Pricing Revenue Management Charges Receivables Payables SF Accounting Setup Administration Service Request Unit Asset 	Prospect Guest Ca First Name No Address 65 City State Zip Tal# Office-Home City State Zip Alis Tel# Office-Home 9/2 E-mail 9/2 Rental Options Expected Move In 09/2 Lease From Date 09/2 Lease To Date 09/2 Lease expiration	an MI P land Mr Mr Rockrose So Viejo C. V 92656 so Viejo C. V 92656 19) 30-3339 26/1992 E2166126 C. V 10/2015 Expendence C. V 04/2015 C. V 92656 03/2016 Imuch ne 03/2016 Imuch ne	Status Applie Code p153 Property hc Unit WAIT Unit Type hc21 Other Data Attack Memory able Items and Options ription Amount eded parking 100.00 0.00 Steems, Inc Lee //WWW.yarv	d 314 2 ments Reserve Unit Rent Deposit Quoted Re Quoted Re asse Expiration diasp13.co iden Creek Au	s for	Hels
		Lease Expira	tions Per Month			
			A	ctual	Target	
		Jun 2016	6	15		•
		Jul 2016	18	15		
		Aug 2016	13	15		
		Sep 2016	3	15		
		Oct 2016	1	9		
		Nov 2016	0	9		-
		Dec 2016	0	9		-
		Jan 2017	0	9		-
		Feb 2017	0	9		-

FIRST PACIFIC GROUP, INC.

PACIFI

FIRST

Over Budget Warning

- When you click "save" on a payable that is coded to a category that is over budget, you will get the popup below on the budget tab.
- You must click "OK" on the Over Budget Warning to save the payable. (Note: if you click "close" on the popup the payable will not be saved!)
- If you do get this warning, please email your regional for approval of the invoice which is going over budget when you send them the payable batch.
- Regionals will forward this email chain to the Accountants who will then see that the over-budget payables have already been approved.

	Payable Invoice Jump To	Payable Invoice Jump To					
Roles	Page contains warnings! Please click again to confirm your changes. Over budget Warning. Please see Budget Tab below						
 Analytics Reports Residential Unit Pricing Revenue Management Charges Receivables Payables SF Accounting 	Payee Info Type Invoice Display Type Standard Payable Display Type Payee Info Street Denver) Payment Method Check Invoice Batch Unposted Batch 36525 Invoice # 1 Batch Invoice Id Ctrl (new) Total Amount 1,000.00 Cash Acct Invoice Invoice Invoice Invoice Date 09/09/2015 Invoice Invoice Invoice Invoice						
 Administration Service Request Unit Asset 	Save Reverse Delete Help						
	Details Payee Info Manual Check Budget OVER BUDGET Over Budget OK						
	Entity Account Current Invoice Open Register 0 Open Payables Open Payables MTD Actual MTD Budget Wariance YTD Actual YTD Budget YTD Payables YTD Payables <t< td=""><td>3</td></t<>	3					

Password Change: Voyager



All new employees should update their password to something secure after their initial login.

YARDIVOYAGER							
	Home Help Proration Calc Sign Ou	ıt					
	Community Manager Dashl	ooard - Hidden (Creek Apartments LLC				
▶ Roles	Resident Activity	6	Unit Statistics				
Analytics	Move Out	<u>0</u> 6	Total Units Leased Units	<u>146</u> <u>146</u>	100%		
Reports	Deposit Accounting	1	Occupied Units	<u>144</u>	98.63%		
Residential	Expiring Leases (120 days)	<u>b</u> 22	Available Units	<u>2</u>	1.37%		
• Unit Pricing	Scheduled Lease Renewals	0	Model/Down/Admin	0	0%		
Revenue Management	Alerts	<u>28</u>	On Hold Units	0	0%		
Charges	Pending Make Ready	8	Unit Transfers	0			
Receivables	Pending Work Requests	<u>11</u>	Traffic				
Payables	Completed WO Followup	0	Prospect Pipeline		1		
SF Accounting			Today's Showings On Waitlist		0		
• Setup			Pending Applications		21		
Administration							
Service Request	Receivable Charge Codes						
• Unit Asset	Change Password board	Person Search					
	About Browser Info						
	Set Default Property						
	About 🗮 🕅	Jump To	🕑 🔛 Today 🔛 Da	iy 👔 Weeł	< 14 2 Week 34		
		S	eptember 2015				



Please stamp all invoices with the date received when they arrive

From your Voyager homescreen, click New Payable Batch under the Open Batches section on the right side of the screen. You should separate your batches and name it in the description field as "SA utilities or SA Regular and the date entered" Enter the total dollar amount of all invoices you will be entering, and the # of invoices, then click Save.

You will then click the piece of paper with a star on it to enter a new payable.

Refer to the Payable printout for the individual numbered items:



1. Payee- Here you insert the vendor code. You can begin typing the name of the vendor and Yardi will prompt you with choices that you can choose from. You can also click the blue link to search for the vendor code by typing one word in the vendor's name in between % signs in the middle search field at the top and clicking the "Find" button:



2. Enter the invoice # listed on the invoice. If none can be found, enter as: Acct#/date For example: 67920595/101113

3. Enter the invoice's current due amount. Please note that **we can't pay any Past Due amount** and will need to request the invoice for any past due charges if they have not yet been paid. To research in Yardi to see if a past due amount has been submitted use the side menu: Analytics → Financial → Transaction Registers to search paid Payables. Tran Type should be set to Payables, and then you can input as much or as little information as you'd like, including GL account, date range and vendor code.

Then you can click Ctrl + F to search the report for the specific account # you are looking for, as shown to the right:

If the past due amount has been paid, please note "paid" next to it on the invoice.

YARDIV	OYAG										0157108	1	1 of 1 🔨 🗙
	Hor		oration Calc Si	ign Out									*- 0-
Register Repo	orts												
Tran Type P. Property VI Account 66 Batch No. Control No. Period 00 Date Created Date	10 (2015	7 10 10/2015	Book Bank Ourner Vender Tenant Charse	nmgascmp	Refe Note Statu Batch Type Depo Type	Anno Anno Anno Anno Anno Anno Anno Anno			Ø Detail Desr Des	freese Columns			
Control Batch	Period	Invoice Date	Due Date	From Date	To Date	Person	Payment	Property	Cash Account	Expense Account	Amount	Reference	Notes
P-460530 36683	09/2015	08/27/2015	09/21/2015			New Hexico Gas Company (rimgasomp)	Check	vi	1111 FIRST REPUBLIC BANK	6610 GAS - VACANTS	15.13	01563410/082715	5 1201 gas 06/10-0/27
P-460532 36683	09/2015	08/26/2015	09/18/2015			New Nexico Gas Company (rengasomp)	Check	wi	1111 FIRST REPUBLIC BANK	6610 GAS - VACANTS	18.70	01565454 082615	K101 gas 08/1-08/26
P-460960 36732	09/2015	04/10/2015	04/10/2015			New Hexico Gas Company (rengasore)	Check	খ	1111 FIRST REPUBLIC BANK	6610 GAS - VACANTS	129.91	REFRINT	reprint dk770
P-469153 36755	09/2015	09/04/2015	09/29/2015			New Mexico Gas Company (nmgasomp)	Check	wi	1111 FIRST REPUBLIC BANK	6610 GAS - VACABITS	13.9	01565542/090415	C106 gas 09/01-09/04
P-469731 36830	09/2015	09/17/2015	10/09/2015			New Hexico Gas Company (rimgasomp)	Check	wi	1111 FIRST REPUBLIC BANK	6610 GAS - VACANTS	16.94	01563447/091715	1104 gas 09/1-09/17
P-469734 36830	09/2015	09/04/2015	09/29/2015			New Mexico Gas Company (nmgasomp)	Check	wi	1111 FIRST REPUBLIC BANK	6610 GAS - VACABITS	13.9	01569593/090415	E206 gas 09/02-09/04
P-469735 36830	09/2015	09/01/2015	09/24/2015			New Hexico Gas Company (rimgasomp)	Check	wi	1111 FIRST REPUBLIC BANK	6610 GAS - VACANTS	16.33	01569593/090115	E206 gas 00/12-09/01
P-470112 36887	10/2015	09/25/2015	10/19/2015			New Mexico Gas Company (nmgasong)	Check	-	1111 FIRST REPUBLIC BANK	6610 GAS - VACANTS	19.33	01571081/092515	H207 gas 09/2-09/25
P-470113 36887	10/2015	09/25/2015	10/19/2015			New Hexico Gas Company (Inmgasomp)	Check	wi	1111 FIRST REPUBLIC BANK	6610 GAS - VACANTS	15.7	01565267/092515	K107 gas 09/01-09/25
P-670267 36912	10/2015	10/01/2015	10/23/2015			New Nexico Gas Company (rengascrop)	Check	wi	1111 FIRST REPUBLIC PANK	6610 GAS - VACANTS	16.33	01564296/100115	NM (ses 09/16-10/01
P-470268 36912	10/2015	10/01/2015	10/23/2015			New Mexico Gas Company (rengasore)	Check	wi	1111 FIRST REPUBLIC BANK	6610 GAS - VACANTS	16.31	01571312/100115	G102 gas 9/15-10/01
0-670269 36912	10/2015	10/01/2015	10/23/2015			New Maxim Gas Company (rendastron)	Check	wi	1111 FIRST REPUBLIC BANK	6510 GAS - VACANTS	15.1	01570073/100115	F202 ras 9/26-10/01
P-470270 36912	10/2015	10/01/2015	10/23/2015			New Mexico Gas Company (rengasore)	Check	wi	1111 FIRST REPUBLIC BANK	6610 GAS - VACANTS	18.79	01564008/100115	8207 gas 09/02-10/01
0-670271 36912	10/2015	10/01/2015	10/23/2015			New Maxim Gas Company (rennasimo)	Check	wi.	1111 FIRST REPUBLIC BANK	6510 GAS - VACANTS	20.00	01563401/100115	1107 alar (%/01-10/01
0-070844 36966	10/2015	05/26/2015	07/21/2015			New Nevim Gas Company (remainmo)	Check	-	1111 FIRST RED BUIC BANK	6510 GAS - VILCENTS	17.33	01571152/062615	H06 ave 06/03-06/26
Durman Maria	10/2016	06/33/3016	06/16/2018			New Maxim Gas Company (respective)	Check	-	1111 ETRIT DED BUTC BANK	ALL DAL VICTOR	14.34	015692701057215	D306 ave 06/03/08/32
A 474040 20200		00 14 10 15	and any adda			the statute case company (migasorip)	Check				10.0		a serie gen enjes enjez
	ang ani 15	00,00,0015	000000000			ment mentor cas company (migasonp)	Check		ALLE FUNDET PREPARENCE DATE.	www.unue.com/com/2	13.74	value (0,000115	a men Ann and manual op
P-470048 36966	10/2015	09/01/2015	09/24/2015			New Mexico Gas Company (rimgasomp)	Check	wi i	1111 PURST REPUBLIC BANK	6610 GAS - VACANTS	19.70	01563401/090115	1 1107 gas 05/02/09/01
P-471340 37036	10/2015	10/14/2015	11/05/2015			New Hexico Gas Company (rimgasomp)	Check	wi i	1111 FIRST REPUBLIC BANK	6630 GAS - VACANTS	14.51	01569254/101415	5 D205 gas 10/02-10/14
P-471343 37036	10/2015	10/14/2015	11/05/2015			New Mexico Gas Company (rengasomp)	Check	wi	1111 FIRST REPUBLIC BANK	6610 GAS - VACANTS	15.71 (65.4	01571312/101415	G102 gas 10/02-10/14

- 4. Enter the invoice date
- 5. Enter the current month

6. Enter the due date of the invoice. If no due date is listed, enter one month from the invoice date.

7. The Type will default to Invoice. The only time you should change it is when you are entering a credit instead of an invoice, in which case you will select the Credit type.

8. In the large notes section you should enter any account # listed

9. Enter the property code to pay for the line item. (If you would like to use a property list to split the payment, please click the Distribute button where you can select the property code, enter the amount, add the GL code and any line item notes.)

10. Enter the amount

11. Enter the unit number that the item is being installed in (if applicable) If the item is purchased as stock type "stock" in the field

12. Enter the GL code, start typing the description or click the right-side button to browse and select the account

13. In the line-item notes please **briefly** describe the item/service, dates of service & unit # (if applicable). **Items that need to be assigned to units should be entered on separate lines.** If multiple items are being recorded on one line enter the number purchased and then description, eg "3 snow shovels"

Pay	yable Invoi	ice				Functions	5 🕶							
Pay	/ee	fgh	iomdep				Pa	ment Status	Unpaid		Display Type	9	Standard Paya	able D
•	voo Info	The	e Home Depot	Pro,(PO		7.	Ту	pe	Invoice	•	Batch	U	Inposted Batc	h 542:
Pay	ee mo	800 800	<u>x 404284 Atla</u> 03453000	<u>ata)</u>			Pa	ment Method	Check	T	Id	C	trl 554819	
Irvo	oice #	533	3511473				Ар	proved By			Navigation		<< >>>	
Exp	ense Type	Ex	pense	•			Ba	tch				_		
Tot	al Amount	2,6	95.81											
· ^ -	Template						<u>Ca</u>	sh Acct	1111					
Inve	oice Date	01/	20/2020				<u>AP</u>	Acct	2502					
Pos	t Month	02/	2020								Created by sst Modified by rde	uris on eaquer	n 02/24/2020 r on 02/24/20	11:33 20 3:
Due	e Date	02/	2020			Q	Ne		25171					
1														
	Details Distribute	Paye	ee Info I	Manual Chec	ik Ci	lear Rows	Ch	eck Budget		12				
	Details Distribute	Paye	ee Info	Manual Chec More Rows 11.	rk CI	lear Rows 12.	Ch	eck Budget	nt Description	13.	Cash Arr	rt	A/P Acct	
	Details Distribute 9. Entity ar		ee Info I View POs 10. Amount 313.87	Manual Chec More Rows 11. Unit 39001i	ik ci	lear Rows 12. Accoun 7002	Ch t	eck Budget Accou APPLIANCES	nt Description	13. Notes Dishwasher GE/Hotpoint 24*	Cash Acc	ct	A/P Acct 2502	
	Details Distribute Dis		ee Info I View POs 10. Amount 313.87 509.01	Manual Chec More Rows 11. Unit 39001i 39001I		lear Rows 12. Accoun 7002 7002	Ch t	Accou	nt Description	13. Notes Dishwasher GE/Hotppint 24" Gas Oven in BLK 30"	Cash Acc 1111 1111	ct	A/P Acct 2502 2502	
	Details Distribute Distribute 9. Entity ar ar ar ar		ee Info Mew POs 10. Amount 313.87 509.01 612.51	Manual Chec More Rows 11. Unit 39001i 39001I 39001I		lear Rows 12. Accoun 7002 7002 7002 7002	Ch t	Accou APPLIANCES APPLIANCES APPLIANCES	nt Description	13. Notes Dishwasher GE/Hotpoint 24" Gas Oven in BLK 30" 15.5 CF Top Freezer Blk	Cash Acc 1111 1111 1111	ct	A/P Acct 2502 2502 2502	
	Details Distribute 9. Entity ar ar ar ar ar		ee Info I View POs 10. Amount 313.87 509.01 612.51 1,211.71	Manual Chec More Rows 11. 39001i 39001I 39001I 39001I		lear Rows 12. Accoun 7002 7002 7002 6765	Ch	Accou APPLIANCES APPLIANCES APPLIANCES OTHER SUPPL	nt Description	13. Notes Dishwasher GE/Hotpoint 24" Gas Oven in BLK 30" 15.5 CF Top Freezer Blk Diamond Upgrade supplies	Cash Acc 1111 1111 1111 1111		A/P Acct 2502 2502 2502 2502	
	Details Distribute Dis		ee Info I View POs 10. Amount 313.87 509.01 612.51 1,211.71 48.71	Manual Chec More Rows 11. 39001i 390011 390011 390011 390011		lear Rows 12. Accoun 7002 7002 7002 6765 7002 7002		Accou APPLIANCES APPLIANCES APPLIANCES OTHER SUPPL APPLIANCES	nt Description	13. Notes Dishwasher GE/Hotpoint 24" Gas Oven in BLK 30" 15.5 CF Top Freezer Blk Diamond Upgrade supplies Range hood 30in Black	Cash Acc 1111 1111 1111 1111 1111 1111		A/P Acct 2502 2502 2502 2502 2502 2502	
	Details Distribute 9. Entity ar ar ar ar ar ar		ee Info I View POs 10. Amount 313.87 509.01 612.51 1,211.71 48.71	Manual Chec More Rows 11. 39001i 390011 390011 390011 390011		lear Rows 12. Accoun 7002 7002 7002 6765 7002 7002		Accou APPLIANCES APPLIANCES APPLIANCES OTHER SUPPLIANCES	nt Description	13. Notes Dishwasher GE/Hotpoint 24" Gas Oven in BLK 30" 15.5 CF Top Freezer Blk Diamond Uggrade supplies Range hood 30in Black	Cash Acc 1111 1111 1111 1111 1111 1111		A/P Acct 2502 2502 2502 2502 2502 2502	
	Details Distribute 9. Entity ar ar ar ar ar ar		ee Info I View POs Amount 313.87 509.01 612.51 1,211.71 48.71	Manual Chec More Rows 11. 39001i 39001I 39001I 39001I		Account 7002 7002 67655 7002		Accou APPLIANCES APPLIANCES APPLIANCES OTHER SUPPL APPLIANCES	nt Description	Image: Notes Dishwasher GE/Hotpoint 24" Gas Oven in BLK 30" 15.5 CF Top Freezer Blk Diamond Upgrade supplies Range hood 30in Black	Cash Acc 1111 1111 1111 1111 1111 1111		A/P Acct 2502 2502 2502 2502 2502 2502	
	Details Distribute 9. Entity ar ar ar ar ar		ee Info I View POs Amount 313.87 509.01 612.51 1,211.71 48.71	Manual Chec More Rows 11. Unit 390011 390011 390011 390011		Account 7002 7002 7002 6765 7002 6705 7002		ACCOU APPLIANCES APPLIANCES APPLIANCES OTHER SUPPL APPLIANCES	IES	Image: Image and the system Dishwasher GE/Hotpoint 24" Gas Oven in BLK 30" 15.5 CF Top Freezer Blk Diamond Upgrade supplies Range hood 30in Black Image hood 30in Black	Cash Acc 1111 1111 1111 1111 1111 1111		A/P Acct 2502 2502 2502 2502 2502	
	Details Distribute 9. Entity ar ar ar ar ar ar		ee Info I View POs 10. Amount 313.87 509.01 612.51 1,211.71 48.71	Manual Chec More Rows 11. Unit 390011 390011 390011 390011		lear Rows		APPLIANCES	nt Description	Image: Dishwasher GE/Hotpoint 24" Gas Oven in BLK 30" 15.5 CF Top Freezer Blk Diamond Upgrade supplies Range hood 30in Black Image hood 30in Black	Cash Acc 1111 1111 1111 1111 1111 1111 1111		A/P Acct 2502 2502 2502 2502 2502	
	Details Distribute 9. Entity ar ar ar ar ar		ee Info I View POs 10. Amount 313.87 509.01 612.51 1,211.71 48.71	Manual Chec More Rows 11. Unit 39001i 39001I 39001I 39001I 39001I		lear Rows		Accou APPLIANCES APPLIANCES APPLIANCES OTHER SUPPL APPLIANCES	nt Description	Ital Notes Dishwasher GE/Hotpoint 24* Gas Oven in BLK 30" 15.5 CF Top Freezer Blk Diamond Upgrade supplies Range hood 30in Black	Cash Acc 1111 1111 1111 1111 1111 1111 1111		A/P Acct 2502 2502 2502 2502 2502 2502	
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	Details Distribute 9 Fentity ar ar ar ar ar		ee Info 1 View POs 10. Amount 313.87 509.01 612.51 1,211.71 48.71	Manual Chec More Rows 11. Unit 390011 390011 390011		lear Rows		Accou APPLIANCES APPLIANCES APPLIANCES OTHER SUPPL APPLIANCES	IES	Ital. Notes Dishwasher GE/Hotpoint 24" Gas Oven in BLK 30" 15.5 CF Top Freezer Blk Diamond Upgrade supplies Range hood 30in Black	Cash Acc 1111 1111 1111 1111 1111 1111 1111		A/P Acct 2502 2502 2502 2502 2502 2502	
	Details Distribute 9. Entity ar ar ar ar ar		ee Info I View POs Amount 313.87 509.01 612.51 1,211.71 48.71	Manual Chec More Rows 11. Unit 39001i 39001I 39001I		lear Rows		Accou APPLIANCES APPLIANCES APPLIANCES OTHER SUPPL APPLIANCES	IES	Ital. Notes Dishwasher GE/Hotpoint 24" Gas Oven in BLK 30" 15.5 CF Top Freezer Blk Diamond Upgrade supplies Range hood 30in Black	Cash Acc 11111 11111 1111 1111 1111 1111 1111 1111 1111 1111 1111		A/P Acct 2502 2502 2502 2502 2502	
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	Details Distribute 9. Entity ar ar ar ar ar		ee Info I View POs Amount 313.87 509.01 612.51 1,211.71 48.71	Manual Chec More Rows 11. Unit 390011 390011 390011 390011		lear Rows		Accou APPLIANCES APPLIANCES OTHER SUPPI APPLIANCES	IES	Ital. Notes Dishwasher GE/Hotpoint 24* Gas Oven in BLK 30" 15.5 CF Top Freezer Blk Diamond Upgrade supplies Range hood 30in Black	Cash Acc 1111 1111 1111 1111 1111 1111 1111	ct	A/P Acct 2502 2502 2502 2502 2502	

Utilities

stamp as follows:

You may have to calculate the billing dates depending on the invoice. For the example below, the invoice shows a Meter Read Date and # of Days billed. You will then use the Meter Read date as the end date for the billing period and subtract the days billed to find the start date for the billing period.

Billed Read Date 01/06/2014 10 Actual Bill Dates Previous Res Move Out Date So, the bill dates would be (10-6=4 so) 1/4-1/10 New Resident You will also have to fill out a Utility Chargeback Move in Date Res Covered Dates Total due from Res ₿Q Charged Ledger (Y) N Sent Notice / N

Meter

YOU

Days

Meter Read

We will not add utility chargebacks from vendor bills to reside neagers for any amount under \$5 or less than 3 days. Any proration calculated to be over \$5 owed should be charged back. This will help standardize all sites and ensure we are charging back for maximum income, without wasting time on pennies.

We will chargeback \$5 per day coded to 5170 Utility Reimbursement when the incoming, current or vacating resident doesn't put the utility in their name and we have to charge back for usage, except for any invoice that is a FINAL BILL.

To find the info in Voyager, put the correct property in your home screen and use the Person Search to enter the unit #, then find the last resident who moved out by scanning the MO Dates, and then see if there is a current resident by scanning the Status line. Calculate a daily rate of any utility by dividing the current due by the # of days billed.

Charge back any amount over \$5 to the past or current resident & send a notice to the resident. To charge back from the resident screen, click the Quick Charge link on Functions dropdown menu on the top of the resident page and complete as below:

unctions 🔻	Data 🔻	Reports 💌		
			Tenan	t Wyckoff (t0027316)
Renew Lease		Move Out Calculator	Date	01/16/2014
Adjust Lease E	nd	Evict	Amour	
Connect Utiliti	es	Assign Unit	Character	9.07
Month to mon	th	Apply Deposit	Charge	<u>e Code</u> util
Reverse Move	In	<u>Charge</u>	Notes	PMN 1/4-1/6
Notice		Screening	Catego	pry
1				Submit

See the sample invoice and Yardi entry below.

0.8125%

1.0625%



\$0.48

\$48.38

This closing statement covers your charges and usage up to the date your service(s) were disconnected. We appreciate your prompt remittance of the closing balance. Any balance remaining after the due date is considered definquent. An overdue balance could affect your credit rating and could result in your account being referred to a collection agency. For ways to pay your bill, see the back of the payment stub below.

County

Current Electricity Charges

City

See the sample invoice and Yardi entry below.

vice					Jump To	
nmpnm PNM,(PO Box 17970 Denver)	Type Payment Method	Invoice Check	 ▼ Display Type ▼ Batch Id 	Standard Payable Dis Unposted Batch 36535 Ctrl (new)	play Type 🔻	
01487904/010614	Category Batch		▼ Navigation	<< >>		
Expense 🔻						
48.38	Cash Acct					
01/06/2014	<u>Ar Acce</u>					
01/2014	Notes	115666966-0148790-4				I
01/06/2014	NOLES					
Reverse Delete Help Payee Info Manual Che View POs More Rows	eck Clear Rows	Check Budget				
Amount Account	t Account	Description	Notes	Cash Acct	A/P Acct	
			.8 elec 12/28-01/06			
	ice	ice	Impnm Type Invoice PNM.(PO Box 17970 Payment Method Check Denver) Category Batch 01487904/010614 Batch	ice	ice	ice Jump To Import Type Invoice Display Type Standard Payable Display Type Upposted Batch 36535 Display Type Batch Id Category Category

Credit Memos

When we receive credit memos from vendors for items returned, please enter as a positive amount in Yardi and change the type to Credit on the upper right side of the payable screen:

When receiving large credit memos please save and enter with other invoices from that vendor to offset payment. If a credit has been entered no check payments will result for the vendor until the invoices are for more than the credit, at which point a check will be cut. If saving up invoices to use on credit let the vendor know.

Payable Invoice Jump To							
Payee	ohhomsup	Туре	Credit 🔻	Display Type	Standard Payable Display Type 🔻		
Payee Info	HD Supply,(PO Box 509058 San Diego) 80079888888	Payment Method Category	Check	Batch Id Navigation	Unposted Batch 36534 Ctrl (new)		
Invoice #	9130982144	Batch		Navigation	~~ >>		
Expense Type	Expense 🔻	Cash Acct					
Total Amount	81.59	AP Acct					
Invoice Date	09/16/2015						
Post Month	07/2015	Notes	3326361				
Due Date	09/16/2015	Notes					

<u>S</u> ave	<u>R</u> everse	Delete	<u>H</u> elp

Details	Payee Info	Manual Check				
Distribute	View POs	More Rows	Clear Rows Check Budget			
Entity	Amount	Account	Account Description	Notes	Cash Acct	A/P Acct
et	81.59	6730	PLUMBING SUPPLIES	Drain Assembly lift and turn		
						•••••••••••••••••••••••••••••••••••••
	81.59	9				

Resident Chargebacks

Carpet cleaning charges for Move-Out's should be coded to 6908 Carpet Cleaning for the basic clean, and 6909 Carpet Repair for any deep clean, red stain removal, seam repair, etc.

Please use the Resident Chargeback stamp as shown on the invoice below. Any other damage caused by the resident should be charged back at Move-Out, including broken window repairs.

Some of the areas you should look at when completing charge backs are:

- Bedbugs
- Cleaning
- Painting
- Lease violation such as not picking up after their pet.
- Eviction filing costs

	DR. CARPET CLEANING, P.O. Box 11686 ALBUQUERQUE, NM 87192 505-821-9180 FED# 74-2823396	INC.	
NAME 5:/	verado apts		
ADDRESS			
	PH. NO.	DATE	2-14
SOLD BY C	ASH C.O.D. CHARGE ON ACCT. MDSE.RETD	. PAID OUT	LAYAWAY
QTY.	DESCRIPTION	PRICE	AMOUNT
4	arpet Cleaning of		
Oh	e bedroom of # 1605		45-00
t w	oberroom apt 818		55 =
	/		├ ──┤
re le	d stain vemarat	¦	110 00
of	17 1005		40-
			<u> </u>
		1	
	JANO		
	, KECD		
		1	
	Resident Charged: No		
	Ballas Haps		
	95885 - 8/S		
			140
	fland you	TAX	980
RECEIVED BY	2 march 0	TOTAL	14980
No 13	5184	S AND RET	URNED GOODS
GP 194.4		SOBEANIE	
PRINTED IN U.S.	1 Thank You		

Unit Assets/Replacement items tracked in Yardi

The Asset directory should be consulted before replacing any appliance or carpet/vinyl in a unit. It will let you know if the item is under warranty and whether we can chargeback the replacement to the past resident due to damages.

Pre-2020 we tracked long-term unit replacements as Unit Assets in Yardi. Starting in 2020 we instead utilize the Unit Segment field in the payable screen to track, and we no longer need to add to the Unit Asset Directory.

Lien Release Reminders

- Any payable(s) requiring a lien release should be entered in a separate batch and noted in the batch description. Please also note in the email to your accountant to send directly to the office for a lien release.
- Specify whether your lien release batches totaling over \$10k need to be mailed via expedited shipping when you send to your Accountant.
- If multiple invoices are entered for the same vendor that should be cut on separate checks, let your Accountant know.
- If any vendor is being paid over \$10k please include Sean, Sarah, Tom, or Jane on the email to the Accountant as they need to approve that the check can be cut. (Note that this does NOT apply to regular utility batches.)
- Make sure you are using the two forms on pages 35 and 36 to complete your lien release form. Send the checklist to the accountant once everything is complete.

General Reminders

* Please don't submit payables on the last 3 business days of the month, unless there is an emergency.

* Batches should be kept to 20 items or less.

Additional instructions for Utilities, Credit Memos & Resident Chargebacks are on the following pages.



LIEN RELEASE PAYMENT CHECKLIST

Property:						
Special Project:						
Total Amount of Project:						
Payment terms:						
1st Payment \$	Received	Lien Release Date				
2nd Payment \$	Received	Lien Release Date				
3rd Payment \$	Received	Lien Release Date				
4th Payment \$	Received	Lien Release Date				
FINAL \$	Received	Lien Release Date				
FINAL PAYMENT CHE	CKLIST					
Initial Date						
	Scope of work	completed per contract				
	Work completed to FPG expectations					
	Pictures taken of all work completed					
	Pictures uploa	ded to the server				
	Full release Li	en Release executed				
	Full release no	starized or copy of ID				

Checklist scanned and emailed to accountant

scan with contract into the server

Lien Release

- To prevent a mechanic's lien from being assessed against the property a lien release form must be signed by the vendor performing the work. Note that these liens are usually assessed by contractors for work over \$2k. If each job is under \$2k individually no lien release is required. The Blank form can be found in the Server om the following location: D:\Data\SITE SERVER_ADMIN SITE_Community Manager\Vendor Forms
- Payments for projects over \$2k should not be released to the vendor until we have either a Conditional or Full release in our possession.
- A blank form can be sent to the vendor for them to fill out, sign and notarize or the vendor can sign in the office to sign the release so they can pick up their check at the same time.

	Address: City, State, ZIP Code: Telephone/Fax Numbers		
	City, State, ZIP Code: Telephone/Fax Numbers		
	Telephone/Fax Numbers		
	-		Fax:
	Project Name		
	Invoice Number(s)		
_	invoice runiber(i)	_	
upon v COMP	which it is drawn. PANY/INDIVIDUAL NAME:	y ment 15	DATE:
	Authorized Signature (Owner/A	gent)	
the ab	The undersigned has been pa ove described project, and hereb	id in FUI by release	FULL RELEASE LL for all labor, subcontract work, equipment and materials supplied to es all mechanic's liens, stop notices, equitable lien and labor and materia
bond 1 us and \$ princip effecti	used on the above premises, up This release is for the benefit pal and surety on all labor and n ve only when check is paid by t	of and n aterial b he bank t	, supplies, labor, services, etc., purchased, acquired or furnished by or for ncluding(date), in the amount of any be relied upon by the owner, prime contractor, the lender and the onds posted for the project. If the payment is by check, this release is upon which it is drawn.
bond 1 us and § princip effecti COMF	This release is for the benefit pal and surety on all labor and m ve only when check is paid by t	of and n of and n naterial b he bank t	, supplies, labor, services, etc., purchased, acquired or furnished by or for ncluding(date), in the amount of any be relied upon by the owner, prime contractor, the lender and the onds posted for the project. If the payment is by check, this release is upon which it is drawnDATE:DATE:DATE:
bond 1 us and \$ princip effecti COMP By:	This release is for the benefit pal and surety on all labor and m ve only when check is paid by t PANY/INDIVIDUAL NAME:	of and n aterial b he bank t	, supplies, labor, services, etc., purchased, acquired or furnished by or for ncluiding(date), in the amount of any be relied upon by the owner, prime contractor, the lender and the onds posted for the project. If the payment is by check, this release is upon which it is drawn DATE:
bond 1 us and \$ princip effecti COMF By:	This release is for the benefit pal and surety on all labor and n ve only when check is paid by t PANY/INDIVIDUAL NAME: Authorized Signature (Owner/A	materials o to and i of and n naterial b he bank t gent)	, supplies, labor, services, etc., purchased, acquired or furnished by or for ncluding(date), in the amount of any be relied upon by the owner, prime contractor, the lender and the onds posted for the project. If the payment is by check, this release is upon which it is drawnDATE:DATE:

- The signed Lien Release form must then saved on the server under Vendors -> Lien Releases
- Under the Lien Releases folder create a sub-folder with the name of the party filing the lien.
- Save the file titled as lien release with property initials, Lien holder, and date.
 - Example: SS Lien Release Jim Bloomer 01-27-15
WAIVER & RELEASE OF LIEN

WHEREAS THE UNDERSIGNED Contractor Subcontractor Supplier Architect/Engineer:

Address:
Telephone / Fax Numbers:
has provided labor, services, materials, or equipment for the above project under an agreement with:
In the capacity as Owner Owner Agent.
Property Name:
Property Address:
Project Name:
Invoice Number(s):

CONDITIONAL RELEASE

The undersigned does hereby release all mechanic's liens, stop notices, equitable lien and labor and material rights against the above project regarding labor services, materials purchased, rented, acquired or furnished or for use and used on above premises up to and including ______ (date)

This release is for the benefit of and may be relied upon by the owner, prime contractor, the lender and the principal and surety on all labor and material bonds.

This release is CONDITIONAL, and shall be effective only upon payment to the undersigned in the sum

of \$_____. If the payment is by check, the release is effective only when check is paid by the bank upon which it is drawn.

DATE:

COMPANY/INDIVIDUAL NAME:

PRINT NAME:

By:

Authorized Signature (Owner/Agent)

FULL RELEASE

The undersigned has been paid in FULL for all labor, subcontract work, equipment and materials supplied to the above described project, and hereby releases all mechanic's liens, stop notices, equitable lien and labor and material bond rights against the project for all materials, supplies, labor, services, etc., purchased, acquired or furnished by or for us and used on the above premises, up to and including (date), in the amount of \$

This release is for the benefit of and may be relied upon by the owner, prime contractor, the lender and the principal and surety on all labor and material bonds posted for the project. If the payment is by check, this release is effective only when check is paid by the bank upon which it is drawn.

COMPANY/INDIVIDUAL NAME:	DATE:	
By:	PRINT NAME:	
Authorized Signature (Owner/Agent)		
State of) Sworn and subscribed before me on the day of,20	
County of) Notary Public:	
	My Commission Expires:	

Receivables Procedure

Receivables How-To

1. Enter the property

2. Enter the unit #

3. Click on the blue Payer link to view & select the proper resident. Then click the Enter Detail button so all outstanding

charges will populate.

4. Enter the amount of the receipt.

5. Enter the date the payment was received. Payments should be stamped daily with a Date Received stamp. The date on the stamp should be the same as the Date Received entered into Yardi.

6. Enter the check number. If the payment is a money order, begin the check # with "MO" and then use the last 4 digits of

the money order number.

7. The Payment Method will default to Check. The only time you will change it is when payment is made with a money order, and you will change the Payment Method to Cash. Some residents are only allowed to pay via Cash Equivalent, so then payment entered must be a money order & the Payment Method must be changed to Cash:

Receipt					
<u>Property</u> <u>Unit</u> <u>Payer</u>	hc 014 t0047745	<u>hc</u> John Palmer (Cu View Ledger	urrent)	Display Type Batch Date Received Post Month	Standard Rec(▼ <u>Unposted Batch 100154</u> 07/17/2015 07/2015
Total Amount Check Number Payment Method Non-Person Payer	1,100.00 MO6879 Check V	Johnnyot@gmx		<u>Cash Acct</u> Print Receipt	1111
Save	Fill Reselect	Delete	Erase Distribution	Create Charge	Help

8. The line item details will auto-populate when you enter the amount, per our settings on which charges to pay off first.

However, if you want to apply the funds in another way you can zero out and/or add any charges to be paid in any amount

up to the total unpaid charge.

9. For the notes you should only specifying if it is a prepay

For example: *Prepay*

If the payee is not the main resident, please note the name of the payee.

For example: payee Enrique Vasquez

10. Once you have confirmed all information has been entered correctly, click the save button.

Entering a receipt from nonresidents

- 1. Enter the Property
- 2. Enter the Payer
- 3. Click on Enter Detail
- 4. Enter the amount of the receipt
- 5. Enter the Account the Income is applied to
- Follow steps 6, 7, 9 and 10 above. 7/29/2024

Receint											Jump To	
Interspic Interspic Interspic Interspic Interspic Braining Ling Pail Bala Bala												
Save Charges	Fill R	eselect Delo	te Erase Distribu	ution Create Ch	arge <u>H</u> eip							
Save Charges	Fil Ro Tenant Info	Account	Charge Date	Charge Amount	Amount Outstanding	Prior Paid	Ref	Notes	Charge	Hold For	Hold	Jntil
Save Charges Pay 1,100.00	Fil Ro Tenant Info Charge Code prepay	Account 2513	Charge Date 09/17/2015	Create Ch Charge Amount	Amount Outstanding	Prior Paid	Ref	Notes	Charge	Hold For	Hold	Jntil
Save Charges B Pay 1,100.00	Fil R Tenant Info Charge Code prepay prepay	Account 2513 2513	Charge Date 09/17/2015 09/17/2015	Create Ch Charge Amount	Amount Outstanding	Prior Paid	Ref	Notes	Charge	Hold For	Hold	Jntil
Save Charges Pay 1,100.00	Fil R Tenant Info Charge Code prepay prepay prepay	Account 2513 2513 2513	Charge Date 09/17/2015 09/17/2015 09/17/2015	Charge Amount	Amount Outstanding	Prior Paid	Ref	Notes	Charge	Hold For	Hold	Jntil
Save Charges Pay 1,100.00	Fil R Tenant Info Charge Code prepay prepay prepay prepay	Account 2513 2513 2513	Charge Date 09/17/2015 00/17/2015 00/17/200 00/10	Create Ch Charge Amount	Amount Outstanding	Prior Paid	Ref	Notes	Charge	Hold For	Hold	Jatil
Save Charges Pay 1,100.00	Fill R Tenant Info Charge Code prepay prepay prepay prepay prepay prepay	Account 2513 2513 2513 2513 2513	Charge Date 09/17/2015 09/17/2015 09/17/2015 09/17/2015	Create Ch Charge Amount	Amount Outstanding	Prior Paid	Ref	Notes	Charge	Hold For	Hold	Jatil

If one of your residents want to move-out and a roommate wants to remain in the unit as resident, you can promote the roommate to primary resident when the primary resident moves out.

You can view the scheduled and in-progress promotions on the main dashboard under Resident Activity -> Promote Roommate

To promote a roommate to resident

1. Open the record for the resident whose roommate you want to promote. For more information. See Record Searches. The Resident screen will appear.

y 📰 Leasing Acti	vite to RentCafe 📗 Account Activity	+ Add + I		Resident
Transfer Unit			Perry Ascot	📥 Profile
Reverse Move In				Activities
Renew Lease	Apartment # 102	Current	Resident	Lease Info
Assign Unit	Unit Type: gp1A1	Move In: 11/1/2016	Resident ID: 10014699	R Dentable Berra
Adjust Lease End	Grey Park Phase I	Lease Expires: 1/31/2017 Rent: \$1075.00/mo	Email: perya@ com	De richaure herris
Notice	819 Taylor St.	Balance: 1,075.00	Mobile:	差 Service Request
Evict	For Worth, 1A 76102	Laternise Count: 07 0	nome.	00 EFT Setup
Month to Month				Credit Card Setup
Screening	🔶 Follow-up 🛛 🗈 Vi	Lease	ACTION REQUIRED: Rer	Connect Utilities
Promote Roomm				

2. On the Leasing Actions menu, select Promote Roommate. The Promote Roommate screen appears.

Promote Roommate		🖺 Submit
Roommate To Promote	Joe Perry X 👻	
Move Out Date	5/31/2017	
Reason for MoveOut	Home Purchase 🔹	
Agent	Property Website 🛛 🛪 👻	
Manual Deposit Accounting		
Copy Attachments	a	
Copy InProcess Memos	a	
Reset NSF Count	a	
Copy Credit Card Info	a	
Copy EFT Info	a	
Swap Tenant Code		

7/29/2024

3. Complete the screen

Roommate to Promote	The roommate to make the primary resident.
	CAUTION The Move-Out Date entered for the roommate promotion is not checked and validated against any previously entered move-out date for the roommate.
	NOTE All roommates for the resident are listed on the look-up list (unless a roommate is guarantor, minor, or already has a move-out date, and therefore cannot be promoted).
Move-Out Date	The notice and move-out date for the current primary resident.
	NOTE If the Move-Out Date is set for before today, the current/notice resident becomes a past resident, and the roommate selected for promotion becomes the current resident.
	NOTE If the Move-Out Date for the resident is set for today or a future date, the roommate promotion is scheduled.
Reason for Move Out	The reason the resident is moving out.
Agent	The agent for the promotion or selected property.
Manual Deposit Accounting	(This field is not editable.)
	Determines how the financial data on the moving primary-resident's record is handled upon move-out in the promote roommate procedure.
	 If the field is selected, upon move out date, the system moves out the Primary Resident, but you must manually process any open financial balances, including deposit accounting.
	 If the field is not selected upon move-out date, the system moves out the Primary Resident and automatically transfers any open financial balances
	to the new Primary Resident (promoted roommate) record.
	NOTE This filed is configured at the system level which requires an optical

4 Click **Submit.** A confirmation message appears. Click **OK** to continue.

5. Click Submit to continue. The Custom Data, Roommates, and Rentable Items sections appear.

Promote Roommate					Save Save	Review and Post	t 😑 Cano
- Custom Data							
Custom Data							
	۹						
Button Name	÷.	Transfer	-				
Revenue Management							
Bonded							
- Roommates							
Existing Poorm	atas						
Existing Roomm	ates				0		
Existing Roomm	ates		Relationship		Q	nsfer	
Existing Roomm	tates ¢ Last Name RM2		© Relationship		Q † Trai	nsfer	
Existing Roomm	tates tastName RM2		Relationship		Q † Trac	nsfer	
Existing Roomm	¢ Last Name RM2		Relationship		Q † Tra	nsfer	
Existing Roomm	tates ¢ Last Name RM2		Relationship		Q	nsfer	
Existing Roomm	tates	Status	Relationship	Amount	Q trai	nsfer	
Existing Roomm	Last Name RM2	\$tatus Occupied	Relationship	¢ Amount	Q	nsfer	

6. For any existing **Custom Data, Roommates**, or **Rentable Items** that you want to transfer with the roommate that you are promoting to primary resident, select the Transfer button in the corresponding row.

Custom Data	Releases the custom data from the primary resident moving out.
	Transfer Determines whether the custom data is transferred to the promoted roommate.
Existing Roommates	Transfer Determines whether an existing roommate is included in the transfer to the promoted roommate's record.
	If the check box is selected, the roommate is moved out from the resident and is added to the promoted roommate's record.
	If the check box is cleared, the roommate is moved out with the resident and is not added to the promoted roommate's record.

Rentable Items	Releases the rentable item from the primary resident moving out.
	Include Determines whether the rentable item is included in the transfer to the promoted roommate.

7. Click Save

8. When you are ready to post the charges, click **Review and Post**. The **Summary Information** screen appears.

Summary Information		🔒 Po	st Promotion
Custom Data			
		٩	
Button Name			φ.
Sample 1-to-many			
Assignale Items			
Revenue Management			
Bonded			
Roommates			
		Q	
First Name	Last Name	Relationship	¢

When ready, click Post Promotion.

Rentable Items

Some sites have parking spots set up in Yardi as Rentable items. To see a list of spots, including which are rented and which are available:

CRM→ Search Unit→ Rentable Items→ Assign Rentable Items → Add Rentable Item

≡	Residents > Orch	hard of Landen > Char	les Zhu 🧿 Current					Re-Invite	to RentCafe 🛛 📁	Resolve Follow-Ups 🔻	•••	#
4	Profile	Current Rentable	ltems								Add Rentabl	eltem
	Activities		items								Add Nerrabi	encenn
i	Lease Info	Current Rentable Items	Future Rentable Items									
쓭	Roommates											
	Signature Documents									۹		
	Rentable Items	Rentable Item	Code 🌻 Amount	Status 🔶 Lease From Date	Notice Date	Release Date	Available Date	Release Now	Release Notice	Cancel Re	lease	
¥	Service Request			0.00		No data available in table						
												_

Add Rentable Item		💾 Save	×
Item Type * s	select item 👻		
ltem * s	select item 👻		
Market Rent 0).00		
Current Rent 0	.00		
Status			
Available Date			
Lease From *			
Lease To			

You can then select the rentable item that you will assigning type the amount it cost and the lease from date.



Unit Segments/Unit Assets

Replacement items tracked in Yardi

Pre-2020 we tracked long-term unit replacements as Unit Assets in Yardi. Starting in 2020 we instead utilize the Unit Segment field in the payable screen to track, and we no longer need to add to the Unit Asset Directory.

 For unit segment reporting, you can pull the Transaction Register in Analytics -> Financial -> Transaction Registers and specify the unit number to result in all purchases for this unit. You can further refine the results by including a period, vendor or GL code as well. This will pull items from 2020 onward.

Register Rep	orts													_	
Tran Type Property e Account	Payable b	•		<u>Book</u> Bank Owner		Referen Notes Status	ce Unit 04-267	25	^ V D	etail CI	ear ccel				
Batch No. Control No. Period Date		to		Vendor Tenant Charge		Batch Type Deposit	Payable Receipt Journal SUBGROUP1 Deposit CUPCODUPD		·	Dis	play				
Created Date						Туре	Credit Can +		,	how Created By how Property Na	freeze Columns ame				
Control Bate	:h Pe	eriod In	voice Date	Due Date	From Date	To Date	Person	Payment Mode	Property	Unit	Cash Account	Expense Account	Amount	Reference	
P-545923 51995	09/20	019 08	/22/2019 0	9/09/2019			AEP Ohio (ohaep)	Check	eb	04-26725	1111 FIRST REPUBLIC BANK	6606 ELECTRIC - VACANTS	146.51	10923197262/0822	9 Vac Elec Usage 07/25 - 08/22
P-546039 52020	09/20	019 09	/05/2019 1	0/05/2019			Chadwell Supply (ohchasup)	Check	eb	04-26725	1111 FIRST REPUBLIC BANK	7326 SP APPLIANCES & W/D INSTALL	1,703.89	002829932	Stainless Fridge, Dishwasher, Stove
									eb	04-26725	1111 FIRST REPUBLIC BANK	7354 SP UPGRADE	44.99	002829932	USB Charge Outlet x 3
									eb	04-26725	1111 FIRST REPUBLIC BANK	7354 SP UPGRADE	196.54	002829932	Closet Door Finger Pull x 2, Deadbo
									eb	04-26725	1111 FIRST REPUBLIC BANK	7354 SP UPGRADE	26.88	002829932	Thermostat
									eb	04-26725	1111 FIRST REPUBLIC BANK	7354 SP UPGRADE	486.66	002829932	wat LED, Ceiling Fan, 24" Vanity Lig
									eb	04-26725	1111 FIRST REPUBLIC BANK	7354 SP UPGRADE	203.92	002829932	Kitchen Faucet, Bathroom Faucet x
P-546335 52091	09/20	019 09	/03/2019 1	0/03/2019			Canal Carpet Cleaning (ohcancar)	Check	eb	04-26725	1111 FIRST REPUBLIC BANK	7006 CARPET / VINYL	1,671.00	CF099477	Diamond Upgrade Vinyl and Floor P
P-546600 52191	09/20	019 09	/06/2019 1	0/06/2019			Matthew Bickel dba Surecoat Painting Co. LLC (ohsurpa) Check	eb	04-26725	1111 FIRST REPUBLIC BANK	6926 PAINTING CONTRACTOR	938.00	19-1427	Paint Walls, Trim and Doors x 3 - Pr
P-546628 52197	09/20	019 09	/18/2019 1	0/18/2019			Chadwell Supply (ohchasup)	Check	eb	04-26725	1111 FIRST REPUBLIC BANK	7323 SP CABINETS/COUNTERTOPS	818.34	002854405	Diamond Cabinet and Drawer Front
P-547019 52271	09/20	019 09	/03/2019 1	0/03/2019			Canal Carpet Cleaning (ohcancar)	Check	eb	04-26725	1111 FIRST REPUBLIC BANK	7006 CARPET / VINYL	557.54	CF099476	Carpet and Pad (Diamond)
P-548409 52568	10/20	019 10	/01/2019 1	0/31/2019			Chadwell Supply (ohchasup)	Check	eb	04-26725	1111 FIRST REPUBLIC BANK	7323 SP CABINETS/COUNTERTOPS	63.33	002876711	Diamond - Over Fridge Cabinet Doc
P-548410 52568	10/20	019 09	/30/2019 1	0/30/2019			Chadwell Supply (ohchasup)	Check	eb	04-26725	1111 FIRST REPUBLIC BANK	7323 SP CABINETS/COUNTERTOPS	336.10	002784494	Diamond - Over Fridge Cabinet Box
P-548666 52634	10/20	019 10	/10/2019 1	1/08/2019			Chadwell Supply (ohchasup)	Check	eb	04-26725	1111 FIRST REPUBLIC BANK	7326 SP APPLIANCES & W/D INSTALL	825.61	002894821	Diamond - Washer and Dryer
P-548669 52634	10/20	019 10	/01/2019 1	0/31/2019			Royal Finish, Inc. (ohroyfin)	Check	eb	04-26725	1111 FIRST REPUBLIC BANK	7323 SP CABINETS/COUNTERTOPS	198.00	37022	Diamond - Counter Resurface
P-548891 52709	10/20	019 09	/30/2019 1	0/30/2019			Chadwell Supply (ohchasup)	Check	eb	04-26725	1111 FIRST REPUBLIC BANK	7354 SP UPGRADE	481.3	002854406	DIAMOND UPGRD - 2 Panel Door 2
P-548920 52713	10/20	019 10	/22/2019 1	0/22/2019		1	Sangar Cleaning Services dba (ohsande)	Check	eb	04-26725	1111 FIRST REPUBLIC BANK	6922 JANITORIAL SERVICE	117.43	7464	Clean
P-550386 53107	11/20	019 10	/23/2019 1	2/03/2019			AEP Ohio (ohaep)	Check	eb	04-26725	1111 FIRST REPUBLIC BANK	6606 ELECTRIC - VACANTS	50.28	10923197262/1023	9 2672 Elec 10/23-11/15

Another option is the AP Analytics Expense Distribution report, which you can find in Analytics Financial- AP Analytics in our menu. You must specify the unit number for this to show purchases for the specified unit within a period. This report separates the expenses for each unit by GL code.

| Expense Distribution | Co Pa Ac Ref No Exp Exp | mean/
txt
count
tes
Expense
perve Type | <u>Unit</u>
 | 09242D | | * Ø D
11
5
5
6
6 | etail
viclude InterComper
egment first
how Created By
rid

 | ny |
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|-----------------------|---|---
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---|---
--
---|--|--|--|--|--|--|--|
| Account Name | Payee Code | Payee Name | Payable Control
 | Batch | Property | Invoice # | Invoice Date

 | Period | Payment
method
 | Amount | Unpaid Amount | Check Control | Check #
 | Check Date | Unit | Notes |
| OTHER SUPPLIES | fghomdep
fabomden | The Home Depot Pro | P-545226
P-545228
 | 51792
51792 | to
to | 506964733
507808517 | 08/13/2019

 | 08/2019 | Check
 | 1,649.67 | 0.00 | K-335248
K-335248 | 6333
 | 08/22/2019 | 09242D
09242D | Diamond supplies
Supplies for Diamond upgrade |
| | | |
 | | | | ,

 | |
 | 1,973.46 | 0.00 | |
 | | | |
| EXTERMINATING SERVICE | misimpes | Simply Pest Control Solutions, LLC | P-545703
 | 51909 | to | 9280 | 08/17/2019

 | 08/2019 | Check
 | 75.00 | 0.00 | K-335427 | 6369
 | 08/27/2019 | 09242D | BB treat - vacant |
| | | |
 | | | |

 | |
 | 75.00 | 0.00 | |
 | | | |
| PAINTING CONTRACTOR | mifiysta | Eve Star Painting and Cleaning LLC | P-545707
 | 51909 | to | 9017 | 08/27/2019

 | 08/2019 | Check
 | 700.00 | 0.00 | K-335421 | 6363
 | 08/27/2019 | 09242D | Vacant paint, prime and UPG |
| | | , |
 | | | |

 | |
 | 700.00 | 0.00 | |
 | | | |
| APPLIANCES | fghomdep
mihomsup | The Home Depot Pro
HD Supply Facilities Maintenance, Ltd | P-545682
P-545684
 | 51906
51906 | to
to | 508367547
9175136089 | 08/20/2019

 | 08/2019 | Check
 | 971.72
522.05 | 0.00 | K-335417
K-335422 | 6359
6364
 | 08/27/2019 | 09242D
09242D | Appliances for Diamond- fridge, dishwash
Diamond - range |
| | | |
 | | | |

 | |
 | 1,493.77 | 0.00 | |
 | | | |
| RESURFACING | | |
 | | | |

 | | -
 | | | |
 | | | |
| | misurtec | Surface Techs LLC | P-545238
 | 51794 | to | 5504 | 08/16/2019

 | 08/2019 | Check
 | 260.00
260.00 | 0.00 | K-335256 | 6341
 | 08/22/2019 | 09242D | tub/surround resurface |
| | | |
 | | | |

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| | Excelle Distribution | Evente Okthoution • Co. Image: Contraction of the image of the i | Excent bidroution Contrainty Sector Contrainty Sector Account Boo Device So Device So Device Boo Device So Device Boo Device <td>Excess Adda Sourcest Consent Payer Name Payebic Control OTHER SUPPLIES Control Solutions, LLC Poster Poster PAINTING CONTRACTOR misinges Simply Pet Control Solutions, LLC Poster APPLIANCES fightindep The Home Depot Pio Poster Poster Poster RESURPACING misures Misure Surface Tede LLC</td> <td>Exercise Dotribution Contrainty Loss VPX-424 Bit State Account Account Account Account Bit State Account Reference Reference Reference Notes Expense Image: State Image: State Image: State Dreft EXMINUS SERVICE melmote State Payee Control Solutions, LLC P-545238 S1792 PAINTING CONTRACTOR melmote Simply Pet Control Solutions, LLC P-545705 S1909 PAINTING CONTRACTOR melmote The Home Dept Pro
minitraine P-545238 S1999 PAINTING CONTRACTOR melmote Support Pro P-545238 S1999 PAINTING CONTRACTOR melmote Support Pro P-545238 S1999 RESURFACING melmote Surface Teche LLC P-545238 S1994</td> <td>Excense lixit/butcon V Conseance VXXXXX VXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX</td> <td>Excent bithoution Constant Junia Variation Variation Particle Particle Particle Particle Particle Particle Stop Particle Particle Particle Particle Particle Particle Stop Particle Paristicle<td>Exercise Distribution Conseary Lists Market J Bit Superior Distribution Parket Account Parket Account Parket Account Parket Account Bit Distribution Bit Distribution Parket Account Parket Account Parket Account Parket Account Bit Distribution Bit Distribution Bit Distribution Parket Account Parket Account Ac</td><td>Exercise Distribution Commany Lists M-4-4-4 Image: Section Distribution Basics Account Basics Image: Distribution <t< td=""><td>Exercise Distribution Conseance Liss Max Max Max Max Max Index Index</td><td>Exercise Distribution Consents Units U</td><td>Exercise Distribution Constancy Units Parket Parket</td><td>Experime Distribution Constant Data Direct <thdirect< th=""> Direct <thdirect< th=""></thdirect<></thdirect<></td><td>Experime Distribution Contractor Difference <thdifference< th=""> Difference <</thdifference<></td><td>Experime Dutification Page Description Data Process Page <</td><td>Specific Direction Operating Operating</td></t<></td></td> | Excess Adda Sourcest Consent Payer Name Payebic Control OTHER SUPPLIES Control Solutions, LLC Poster Poster PAINTING CONTRACTOR misinges Simply Pet Control Solutions, LLC Poster APPLIANCES fightindep The Home Depot Pio Poster Poster Poster RESURPACING misures Misure Surface Tede LLC | Exercise Dotribution Contrainty Loss VPX-424 Bit State Account Account Account Account Bit State Account Reference Reference Reference Notes Expense Image: State Image: State Image: State Dreft EXMINUS SERVICE melmote State Payee Control Solutions, LLC P-545238 S1792 PAINTING CONTRACTOR melmote Simply Pet Control Solutions, LLC P-545705 S1909 PAINTING CONTRACTOR melmote The Home Dept Pro
minitraine P-545238 S1999 PAINTING CONTRACTOR melmote Support Pro P-545238 S1999 PAINTING CONTRACTOR melmote Support Pro P-545238 S1999 RESURFACING melmote Surface Teche LLC P-545238 S1994 | Excense lixit/butcon V Conseance VXXXXX VXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX | Excent bithoution Constant Junia Variation Variation Particle Particle Particle Particle Particle Particle Stop Particle Particle Particle Particle Particle Particle Stop Particle Paristicle <td>Exercise Distribution Conseary Lists Market J Bit Superior Distribution Parket Account Parket Account Parket Account Parket Account Bit Distribution Bit Distribution Parket Account Parket Account Parket Account Parket Account Bit Distribution Bit Distribution Bit Distribution Parket Account Parket Account Ac</td> <td>Exercise Distribution Commany Lists M-4-4-4 Image: Section Distribution Basics Account Basics Image: Distribution <t< td=""><td>Exercise Distribution Conseance Liss Max Max Max Max Max Index Index</td><td>Exercise Distribution Consents Units U</td><td>Exercise Distribution Constancy Units Parket Parket</td><td>Experime Distribution Constant Data Direct <thdirect< th=""> Direct <thdirect< th=""></thdirect<></thdirect<></td><td>Experime Distribution Contractor Difference <thdifference< th=""> Difference <</thdifference<></td><td>Experime Dutification Page Description Data Process Page <</td><td>Specific Direction Operating Operating</td></t<></td> | Exercise Distribution Conseary Lists Market J Bit Superior Distribution Parket Account Parket Account Parket Account Parket Account Bit Distribution Bit Distribution Parket Account Parket Account Parket Account Parket Account Bit Distribution Bit Distribution Bit Distribution Parket Account Parket Account Ac | Exercise Distribution Commany Lists M-4-4-4 Image: Section Distribution Basics Account Basics Image: Distribution Image: Distribution <t< td=""><td>Exercise Distribution Conseance Liss Max Max Max Max Max Index Index</td><td>Exercise Distribution Consents Units U</td><td>Exercise Distribution Constancy Units Parket Parket</td><td>Experime Distribution Constant Data Direct <thdirect< th=""> Direct <thdirect< th=""></thdirect<></thdirect<></td><td>Experime Distribution Contractor Difference <thdifference< th=""> Difference <</thdifference<></td><td>Experime Dutification Page Description Data Process Page <</td><td>Specific Direction Operating Operating</td></t<> | Exercise Distribution Conseance Liss Max Max Max Max Max Index Index | Exercise Distribution Consents Units U | Exercise Distribution Constancy Units Parket Parket | Experime Distribution Constant Data Direct Direct <thdirect< th=""> Direct <thdirect< th=""></thdirect<></thdirect<> | Experime Distribution Contractor Difference Difference <thdifference< th=""> Difference <</thdifference<> | Experime Dutification Page Description Data Process Page < | Specific Direction Operating Operating |

Unit Segments/Unit Asse<mark>ts</mark>

- Pre-2020 we tracked long-term unit replacements as Unit Assets in Yardi. Starting in 2020 we instead utilize the Unit Segment field in the payable screen to track, and we no longer need to add to the Unit Asset Directory.
- The Asset directory should be consulted before replacing any appliance or carpet/vinyl in a unit. It will let you know if the item is under warranty and whether we can chargeback the replacement to the past resident due to damages.
- A list of all Assets is on the next page.
- To pull info for items replaced in 2019 and prior, There are a few ways you can search a unit's assets navigating from the side menu:

•Unit Asset \rightarrow Review Asset. Then enter the Property code & Unit # to see all assets recorded for that unit listed on the side menu

•Unit Asset → Asset Directory Report. Then enter the Property Code & Unit # to see a summary of all assets. There are now two versions. The original Asset Directory Report is labeled V2. Both versions are on the next page.

Vendor Setup & Insurance Expiration

- Once a vendor has been approved by your Regional Manager for work on your property you will need to submit documents to your Accountant to get them set-up in Yardi as a vendor.
- You will need a copy of the current liability insurance and a completed vendor set-up form as shown below. Send these to your Accountant and they will set up the vendor in Yardi and provide you with the vendor code. Also save the insurance and W-9 to your site server in the location shown below.



If a vendor does work on-site (installing, cleaning, etc) we need to have valid Worker's Comp insurance for them, unless they are a Sole Proprietor in which case it is not required. If they are a Sole Proprietor with no WC ins who is having sub-contractors (friends, brothers, etc) do work onsite for them, we need them to sign the Indemnity Agreement which is found on the server in Site Server→Admin→ →Community Manager→ Vendor Forms→ Vendor Contract→ **FPG Workers Compensation Indemnity Agreement.** This should be forwarded to your Accountant who can save in the Vendor's Yardi setup.

PROPERTY: VENDOR NAME: DBA (IF APPLICABLE): VENDOR ADDRESS: PHONE NUMBER: EMAIL: REMITTANCE ADDRESS (IF DIFFERENT): BILLING PHONE NUMBER: BILLING EMAIL FEDERAL TAX ID OR SOCIAL SECURITY NUMBER: NET TERMS: HOW SHOULD WE CONTACT YOU FOR UPDATED INSURANCE? BILLING EMAIL BILLING PHONE OTHER, PLEASE SPECIFY: FOR INTERNAL USE ONLY DEFAULT EXPENSE CODE: WILL THEY BE WORKING ON SITE? YES NO IF YES, DID THEY PROVIDE LIABILITY & WORKERS COMP INSURANCE? YES IF NO, DID THEY COMPLETE INDEMNITY FORM? YES NO

NEW VENDOR INFORMATION

*PLEASE SUBMIT WITH COMPLETED W-9 & INSURANCE CERTIFICATES

PACI

Vendor Set up & Insurance Expiration

- If a vendor has expired liability or Workers Comp insurance, we will not be able to issue a check.
- To Determine if insurance has expired go to Reports- Vendor -Vendor Directory, then enter vendor code.

	Home Help Pror	ation Calc Sign Out
	Vendor Dire	ctory
• Roles		oknusped Push Pedal Pull, 5820 N. May Ave
 Analytics 	Vendor	Oklahoma City OK 73112
 Reports 	State	
Residential	Zip	
• Unit Pricina	WCExp	II
Revenue Management	Liab Ins	
Charges	Sort By	Vendor Code V
• Charges	Destination	Screen V
 Receivables 		Advanced
 Payables 		Submit Clear Help
SF Accounting		
• Setup		
 Administration 		
t Convice Request	File or Code:	: rs_Vendor_Directory.txt

• You will then hit submit and see the page below. If the dates have expired you need to email your Accountant updated copies for each.

Code Name Contact Address Phone Number WC Number Liability Ins okpusped Push Pedal Pull 5820 N. May Ave, Oklahoma City, OK 73112 (405)205-2996 01/30/2015 01/30/2015	Vendor Direct Vendor=okpusped AN	c tory ID Sort By=Vendor Code		Excel PDF			
okpusped Push Pedal Pull 5820 N. May Ave, Oklahoma City, OK 73112 (405)205-2996 01/30/2015 01/30/2015	Code	Name	Contact	Address	Phone Number	WC Ins	Liability Ins
	okpusped	Push Pedal Pull		5820 N. May Ave, Oklahoma City, OK 73112	(405)205-2996	01/30/2015	01/30/2015



Credit Card Recaps - How to Enter

- Start by putting all of your receipts in the order shown on your Visa / American Express card statement and then numbering them in the top right-hand corner in this order.
- Start a payable batch, the description should start with VISA, followed by the property and employee name(s).

Id	(new)			
Total Declared	0.00	Enter	ed 0.00	D
Items Declared	0	Enter	ed 0	
Description	VISA TO K. B	rown		
	Save	New	Close	Help

Total will be all credit card statements for your property -Vendor code for Chase is cachacar. -Vendor code for American Express is caameexp Invoice # - last 4 digits of the CC# / last day of CC cycle eg: 1111/122213 Invoice date – use default date Notes – Last name & last 4 digits of CC# eg: Young 1111 (You will create an invoice for each employee credit card)

YARDIVOYAC	JER					
	Home Help Pro	ration Calc Sign Out				
	Payable Inv	oice				
RolesAnalytics	<u>Payee</u> Payee Info	cachacar Chase Card Services, (P.O. Box 94014 Palatine)	Type Payment Method Category	Invoice Check	Display Type Batch Id	Standard Payable Display Type V Unposted Batch 36539 Ctrl (new)
Reports	Invoice #	0292/121614	Batch		Navigation	<< >>
Residential Unit Pricing	Expense Type Total Amount	Expense 2,221.02	<u>Cash Acct</u> AP Acct			
 Revenue Management Charges Receivables 	Invoice Date Post Month Due Date	12/17/2014	Notes	Young 0292		
 Payables SF Accounting Setup 						
Administration Service Request	<u>S</u> ave	Reverse Delete Help				
• Unit Asset						

Visa Card Recaps - How to Enter

Enter as you would if creating the visa recap / breaking out each part of the invoice to the correct GL.

Notes – Enter the number, dash, and notes with the first word capitalized.

Ex: "1-Pens, paper, stapler, tape"

You will have to abbreviate your notes as you have limited space.

Distribute	View POs	More Rows		Clear Rows Check Budget			
Entity	Amount	Account	t	Account Description	Notes	Cash Acct	A/P Acct
ss	10.0	0 6332	1	OFFICE SUPPLIES	1 - Pens,paper,stapler,tape		
ss	20.5	5 6519		WEBSITE	2 - Monthly website bill Dec		
ss	154.5	5 6516		RESIDENT / PUBLIC RELATIONS	3- Coffee and Cookies Party		

- Once you have completed your payables, please double check via the batch report.
- Then send the receipts, scanned and saved separately for each credit card / employee, to your regional Manager to review.
- Finally, please ensure all receipts are scanned and emailed with your Visa recaps to the SF office. Save the hard copies for at least 3 months.

Reminders:

- Tipping on all transactions to not exceed 20%.
- Each weekly employee lunch should not exceed 20%.
- Donations are not permitted.
- If the expense isn't property related, mark on receipt who approved the purchase.
- All gift cards must be updated on the gift card tracking log at time of entering recap.
- Managers are responsible for monitoring all expenses to be kept within budget.
- Receipts must be provided for all transactions. Failure to produce a receipt will result in the card holder having to pay for the purchase. If this happens frequently credit card privileges may be revoked.
- Use of the app TurboScan or similar product is highly recommended to avoid any receipts being lost. It creates a PDF of the receipt and you can label it with the name of the receipt and the amount.
- Any reimbursement should be coded to 6318 and the receivable coded the same way to wash the expense. MUST be reimbursed same day of entering into Yardi and before it is sent to SF office.
- All Star and Company gift cards should be purchased on Amazon and only purchased via the Business Account only and coded to GL 64070
- Details for any accidental personal charge or missing receipt must be noted in the body of the email that is emailed to the SF office.

Navigate the site server: Site Server \rightarrow Weekly Reports \rightarrow Year \rightarrow Month

Open up the most recent Weekly Report

Click File \rightarrow Save As \rightarrow Save in current month folder, named with today's date

The report is customized for each Community with the respective Community name, Manager's name, Maintenance Supervisor's name and number of units.

****ONLY GREEN CELLS WILL BE FILLED IN. BLUE CELLS ARE AUTO-GENERATED****

Cell D2 - Enter the dates of the previous week., Monday through Sunday (10/19/15 – 10/25/16)

	-	-	-	-	
WEEKLY REPORT					
The Orchards at Four Mile			04/29/19-5	/05/19	
663 Units		(Covering	g 7 Days of Activity)) Last Monday thru \$	Sunday Night
Manager :Krystin Brown					
Maint Supervisor: Robert Grider					
Octomer Dete		Mataa			

First Section- Occupancy Data-

Pull Box Score report- Analytics \rightarrow Operations \rightarrow Residential Analytics

YARDIVOY	AGER
	Home Help Proration Calc Sign Out
	Community Manager Dashboard - N
 Roles Analytics Reports Residential Unit Pricing Revenue Management Charges Receivables 	Resident Activity Move In Financial Operations Accounting Residential Analytics Schedul Service Request Analytics Scheduled Roommate Promotions Maintenance
 Payables SF Accounting Setup Administration Service Request Unit Asset 	Pending Make Ready Pending Work Requests Completed WO Followup Calendar Dashboard Person S



- Enter property Code
- Dates will be entered for the current month first day of month to last day of month (M/1/YYYY-M/31/YYYY)
- Report type is 'Box Score Summary'
- Summarize by 'Property'

Residential Reports						
Property je Unit Type	Date Month / Year Report Type Summarize By	09/01/2016 to 01/2017 Box Score Summary Property	09/30/2016 09/2016 V	Show Graphs Show Grids	Excel Display	PDF Clear

Hit Display

BoxSc Timbercree Date = 09/	ore Summary ek East Townhomes (te) /01/2016-09/30/2016								
Availa	bility								
Code	Name	Avg. Sq Ft.	Avg. Rent	Units	Occupied No Notice	Vacant Rented	Vacant Unrented	Notice Rented	Notice Unrented
te	Timbercreek East Townho	1,298	985	100	88	1	0	5	6
	Total	1,298	985	100	88	1	0	5	6
Reside	ent Activity								
Code	Name	Units	Move In	Reverse Move In	Move Out	Cancel Move Out	Notice/Skip/Early Term	Cancel Notice	e Rented
te	Timbercreek East Townho	100	9	0	1	0	6	0) 7
	Total	100	9	0	1	0	6	C	7
Conve	rsion Ratios								
				First Cor	itact				
Code	Name	Calls	Walk-in	Email	Other	Ung. First Contact	Show	Applied	Approved %
te	Timbercreek East Townho	9	4	32	0	0	16	7	/ 10
	Total	9	4	32	0	0	16	7	10

- Under the Availability Section you will find the information for Cells C8, C9, and C11
- Cell C8- Enter Vacant Unrented
- Cell C9- Enter Vacant Rented
- Cell C11- Enter Rented Notice Rented

	Α	В	С							
6	Occupancy Data (Analytics-Operations-Residential-Box Score)									
7		Total Current Vacants	1							
8		Unrented Vacants	0							
9		Rented Vacants	1							
10		Non-Revenue + Employee + Down Units	0							
11		Rented On Notice	5							

• For Cells C12 and C13- Click Home in Yardi, then under Unit Statistics, next to Available Units click the number of units available



Monday Report

Weekly Report

7

Market Survey should be done every Friday or Saturday in the server and saved as every time. On Monday weekly reports can be completed and emailed to your reginal that weekly reports are completed. Save as every time in the sever name Property Code Weekly Report and the date completed on. Ex: VI Weekly Report 06-20-2022



To pull your Budget Variance you will go to Analytics \rightarrow Financial \rightarrow Custom Financial \rightarrow Pull property and excel.

Custom Financi	al Reports										
Property Book Report Template Period Summary By Account Tree	vi Cash budget 10/2018 SUBGROUP1 budget_d	¢ <u>06/2022</u> ✓	SUBGROUP1 SUBGROUP2 SUBGROUP4 SUBGROUP4 SUBGROUP5 SUBGROUP5 Freeze Pane		 ↓ Un Dec ▼ Sho Sur 	it cimalDigits www.Account mmmary [] Ti	0 V Hide ree Level	Sup <mark>øress Zero</mark> V Detail 1 V Grid	Clear PDF Excel Display		
/2024				FIRST	PAC	IFIC					

Analytic Reports

The most common analytic report you will pull is the Budget Comparison Report. To pull this report you will Click on Analytics on the menu on the left-hand side of the screen. Then click Financial -> Financial

First Pacific Group - Em	nple 🗙 🕒 www.fpacific.com/resource 🗙 🕒 Yardi Systems, Inc Finan 🙁 🔛	
← → C 🖬 🔒 ht	ttps://www.yardiasp13.com/voyagerupgr7s/pages/menu.aspx	Q T 🕁 :
YARDIVOYAC	GER	Site Search
	Home Help Proration Calc Sign Out	* • 0 •
	Einancial Reports	
 Roles Analytics Reports Residential Unit Pricing Revenue Management Charges Receivables Payables SF Accounting Setup 	Betty hc SUBGROUP1 SubcROUP2 SUBGROUP2 SubcROUP2 SUBGROUP3 Operations Custom Financial Analytics Custom Financial Analytics 15 Financial Report Notes Summary General Ledger Analytics AP Analytics Transaction Registers Budgeting	Zero 🗹 Graph 🗍 D
Administration	Valiatice Analysis	

This will bring you to the Financial Reports page. Enter property, select Budget Comparison from Report Type dropdown menu, and enter the period. Then click Display.

YARDIVOYAG	Site Search								
Ho	Home Help Proration Calc Sign Out								
•	Financial Reports	S							
 Roles Analytics Reports Residential Unit Pricing 	Property hc Book ca Account Tree Report Type B Period 07 Report Columns Ar	sh udget Comparison ¥ //2015 to 07/2015 ctual ¥	SUBGROUP1 SUBGROUP2 SUBGROUP3 SUBGROUP4 Grid I Freeze Pane Decimals I Show Property Name Suppress Ze Summary Tree Level 1 Show Acct. Code I Budget V	ro 🗹 Graph 🗌	Clear PDF Exce Displa				
Revenue Management									

The Budget Comparison Report will allow you to view current Income and Expenses against what was Budgeted. Manager should be checking this daily to ensure they will not exceed budgeted expenses. The report also shows the budget variance, percent variance, and Year to Date Spending and Budget.

The Percent Variance will highlight in Red if it is substantially over budget and will remain green if under budget. *When entering Payables, if the bill puts the category over budget by 10%you will need to email the Regional Manager for approval before the payable can be processed.

· · · · · · · · · · · · · · · · · · ·	6700	IN-HOUSE GEN MAINT/SUPPLY				
	6702	APPLIANCE PARTS	42.57	280.00	237.43	84.80
Roles	6708	DOORS (INTERIOR / ENTRY)	0.00	0.00	0.00	N/A
	6710	ELECTRICAL (INTER. / EXTER.)	65.90	275.00	209.10	76.04
Analytics	6712	EQUIPMENT MAINTENANCE	286.78	0.00	-286.78	N/A
 Reports 	6714	EQUIPMENT PURCHASES	299.99	185.00	-114.99	-62.16
 Residential 	6716	EXTERMINATING SUPPLIES	87.50	20.00	-67.50	-337.50
• Residential	6718	FIRE / SAFETY	450.00	175.00	-275.00	-157.14
 Unit Pricing 	6720	HVAC / BOILER SUPPLIES	53.51	80.00	26.49	33.11
Revenue Management	6722	JANITORIAL SUPPLIES	194.14	110.00	-84.14	-76.49
	6724	LANDSCAPING SUPPLIES	0.00	55.00	55.00	100.00
Charges	6726	LOCKS / KEYS	74.74	120.00	45.26	37.72
 Receivables 	6728	PAINT / DRYWALL	745.31	550.00	-195.31	-35.51
Davablec	6730	PLUMBING SUPPLIES	600.45	720.00	119.55	16.60
, rayables	6732	UNIFORMS	220.64	280.00	59.36	21.20
 SF Accounting 	6734	POOL / REC SUPPLIES	261.21	255.00	-6.21	-2.44
Setup	6736	WINDOWS/MIRRORS	0.00	0.00	0.00	N/A
a distribution at the	6738	HARDWARE	65.98	230.00	164.02	71.31
 Administration 	6765	OTHER SUPPLIES	102.66	0.00	-102.66	N/A
 Service Request 	6770	TOTAL IN-HOUSE EXPENSES	3,551.38	3,335.00	-216.38	-6.49



Budget Variance Report

You will be responsible for submitting a budget variance report. This will be submitted with your 2nd Weekly Report of the month (if no overages no explanation will be necessary at that time). Then a final one submitted by the end of the month.

Below is how to pull the report and an example. As you will need to get approval on any items/services that exceed budget this will help you track, and you should easily know why you are over budget. If you are not clear click on the line item in the budget comparison report and click on detail- it will list all expenses in that category for the month. Filter screen and report are shown below.



Click excel to view the report and enter in notes.

	Sheridan Square Apartn	nents,LLC (ss)							
	Budget Varianc	e Report							
Period = Apr 2015									
	Book = Cash ; Tree =	budget_cf							
	Month to Date	Budget	Variance	Explanation					
Fixed Admin	25,546	25,244	-302	Management fee under	r budget				
Administrative	1,179	1,815	636						
Payroll	25,609	25,370	-239	Wages and bonus unde	er budget				
Marketing/Advertising	2,889	2,689	-200	Intenet adv/magazines	s under budge				
Utilities	19,570	23,304	3,734						
In House Maintenance	2,553	4,775	2,222						
CAM	102	730	628						
Contract Services	3,391	4,420	1,029						
Rehab/Replacement	1,744	5,360	3,616						
SUBTOTAL	82,584	93,707	11,123						
Special Projects	857	3,300	2,443						
TOTAL	83,441	97,007	13,566						



Pulling Standard Voyager Reports

Financial Reports Navigate from the side menu: Analytics→ Financial→ Financial

Roles	Resident Activity
Roles	Move In
 Analytics 	Financial
Reports	Financial Analytics
Residential	Operations Custom Financials
• Unit Pricing	Schedul Custom Financial Analytics - Notes
Revenue Management	Alerts Mainte
Charges	Pending General Ledger Analytics
Receivables	Pending AP Analytics
Payables	Transaction Registers
SF Accounting	Budgeting Forecasting
• Setup	Variance Analysis
Administration	
 Service Request 	Colordan Daskbeard Darson
• Unit Asset	_ Calendar Dashboard Person

Input property, period, and select Report Type, then click Display:

Financial Repo	rts		
Property Book	hc	SUBGROUP1 SUBGROUP2	Clear
Account Tree Report Type	Budget Comparison	SUBGROUP3 SUBGROUP4	Excel
Period Report Columns	07/2015 to 07/2015 Actual V	Grid 🔲 Freeze Pane 📄 Decimals 🕢 Show Property Name 📄 Suppress Zero 🖉 Graph 📄 🗍 Summary 🗍 Tree Level 1 🔻 Show Acct. Code 🖉 Budget 💽 👻	Display

The blue #s in the Analytic reports can be clicked to get more detailed information.

To print, click PDF and then you can print the PDF. Note that the default is to print on legal paper, so you may have to change a setting when printing to "Shrink Oversized pages"

⊚ Fit
Actual size
Shrink oversized pages
○ Custom Scale: 100 %
Choose paper source by PDF page size
Print on both sides of paper
Orientation:
Auto portrait/landscape
Portrait
🔘 Landscape
Page Setup



This will bring up the available units that are not rented. For Cell C12-Unrented Notices- Less than 30 days, you are looking for the notices that will be moving out within the next 30 days. (Ex. 1-Unit #1821 since the move out date is 9/30/16)

Available Units - 09/	20/2016	e Pe	rson S	earch					
Any T	-21							I	
- Ally	Unit	Unit Type	BR	Market Rent	Date Available ⊽	Days Vac.	Sqft	Occ.	Amenities
	1704	te-2	2	930.00	01/11/2017	0	1,245	Notice	
	1850	te-3	3	1,040.00	12/07/2016	0	1,350	Eviction	
	1723	<u>te-2</u>	2	930.00	12/02/2016	0	1,245	Notice	
	1745	<u>te-2</u>	2	930.00	11/09/2016	0	1,245	Notice	
	1822	<u>te-2</u>	2	930.00	11/08/2016	0	1,245	Notice	
-	1821	te-3	3	1,040.00	10/07/2016	0	1,350	Notice	
						-			

For Cell C13-Unrented Notices- More than 30 Days, you are looking at notices that will be moving out within the next 31+ days (Ex. 5- the remaining amount of units moving out)

	А	В	С
12		Unrented Notices - Less than 30 Days	1
13		Unrented Notices - More than 30 Days	5

Cells C15-C17 will automatically populate based on the information input above. These cells should match the home screen in Yardi under Unit Statistics for Leased Units, Occupied Units, and Available Units.

Unit Statistics						
				А	В	С
Total Units	100		14		The figures below will automatically calculate based on the input ce	lls above
Leased Units	100	100%	15		Provided 9/ (here there aligned (testa) write)	00.00%
			15		Occupied % (top three lines / total units)	99.00%
Occupied Units	99	99.00%	16		Actual Leased % (unrented vacants / total units)	100.00%
Available Units	<u>6</u>	6.00%	17		Total Exposure % (Unrented vacants & notices / total units)	6.00%

For Cells F8 and F9, you will need to pull the Unit Availability Report

Reports \rightarrow Unit \rightarrow First Pacific- Unit Availability with Amenities Enter Property Code As of Date- Should be current date Include – Pre-leased

First Pacific - Unit Ava	First Pacific - Unit Availability Detail Report										
<u>Property</u> <u>Unit Type</u> As Of Date Include	te 09/19/2016 Pre Leased V	[] []	Output Type Merge Reports Show Grid <u>G</u> enerate	PDF ▼ ✓ ✓ Clear							
7/29/2024				5							

Pulling Standard Voyager Reports

Residential Reports

Navigate from the side menu: Analytics \rightarrow Operations \rightarrow Residential Analytics



Select Report Type, then input property, date, month/year, and select Summarize By (as necessary) then click Display:

Residential Reports															
Property Unit Type Unit Availability Orchard of Landen (ol)	Date Month , Report Summa	/ Year Type arize By	07/20/201 05/2015 Unit Avail UnitType	5 to ability	07/2	29/2015 2015 ▼		Show Graphs Show Grids		Excel	PD Cle	F			
As Of = 07/29/2015	Avg. Sq Ft	Avg. Rent	Units	Occupied No Notice	Vacant Rented	Vacant Unrented	Notice Rented	Notice Unrented	Avail	Model	Down	Admin	% Occ	% Occ w/NonRev	% Leased
															100.00
Aspen	750	826	86	74	3	0	4	5	5	0	0	0	96.51	96.51	100.00
Aspen Aspen-Upgrade	750 750	826 900	86 2	74 2	3	0	4	5	5	0	0	0	96.51 100.00	96.51 100.00	100.00
Aspen Aspen-Upgrade Maple	750 750 750	826 900 825	86 2 19	74 2 18	3 0 0	0 0 0	4 0 0	5 0 1	5 0 1	0 0 0	0 0 0	0 0 0	96.51 100.00 100.00	96.51 100.00 100.00	100.00 100.00
Aspen-Upgrade Maple Maple - Upgrade	750 750 750 750	826 900 825 900	86 2 19 1	74 2 18 1	3 0 0 0	0 0 0 0	4 0 0 0	5 0 1 0	5 0 1 0	0 0 0	0 0 0	0 0 0 0	96.51 100.00 100.00 100.00	96.51 100.00 100.00 100.00	100.00 100.00 100.00 100.00
Aspen Aspen-Upgrade Maple - Upgrade Buckeye	750 750 750 750 1,000	826 900 825 900 950	86 2 19 1 11	74 2 18 1 9	3 0 0 1	0 0 0 1	4 0 0 0 0	5 0 1 0 0	5 0 1 0 1	0 0 0 0	0 0 0 0	0 0 0 0	96.51 100.00 100.00 100.00 81.81	96.51 100.00 100.00 100.00 81.81	100.00 100.00 100.00 90.90
Aspen Aspen-Upgrade Maple - Upgrade Buckeye Buckeye - Upgrade	750 750 750 750 1,000 1,000	826 900 825 900 950 1,075	86 2 19 1 11 2	74 2 18 1 9 2	3 0 0 1 0	0 0 0 1 0	4 0 0 0 0 0	5 0 1 0 0 0	5 0 1 0 1 0	0 0 0 0 0	0 0 0 0 0	0 0 0 0 0	96.51 100.00 100.00 81.81 100.00	96.51 100.00 100.00 100.00 81.81 100.00	100.00 100.00 100.00 90.90 100.00
Aspen-Upgrade Maple Maple - Upgrade Buckeye Buckeye - Upgrade Cypress	750 750 750 1,000 1,000 1,029	826 900 825 900 950 1,075 975	86 2 19 1 11 2 38	74 2 18 1 9 2 32	3 0 0 1 0 1	0 0 0 1 0 0	4 0 0 0 0 0 0	5 0 1 0 0 0 5	5 0 1 0 1 0 5	0 0 0 0 0 0	0 0 0 0 0 0	0 0 0 0 0 0	96.51 100.00 100.00 81.81 100.00 97.36	96.51 100.00 100.00 81.81 100.00 97.36	100.00 100.00 100.00 90.90 100.00 100.00
Aspen Aspen-Upgrade Maple - Upgrade Buckeye Buckeye - Upgrade Cypress - Upgrade Cypress - Upgrade	750 750 750 1,000 1,000 1,029 1,029	826 900 825 900 950 1,075 975 1,100	86 2 19 1 11 2 38 2	74 2 18 1 9 2 32 1	3 0 0 1 0 1 1	0 0 0 1 0 0 0	4 0 0 0 0 0 0 0 0	5 0 1 0 0 5 0	5 0 1 0 1 0 5 0		0 0 0 0 0 0 0	0 0 0 0 0 0 0	96.51 100.00 100.00 81.81 100.00 97.36 50.00	96.51 100.00 100.00 81.81 100.00 97.36 50.00	100.00 100.00 100.00 90.90 100.00 100.00 100.00
Aspen-Upgrade Maple Maple - Upgrade Buckeye Buckeye - Upgrade Cypress - Upgrade Cypress - Upgrade Oak	750 750 750 1,000 1,000 1,029 1,029 1,000	826 900 825 900 950 1,075 975 1,100 950	86 2 19 1 11 2 38 2 127	74 2 18 1 9 2 32 1 111	3 0 0 1 0 1 1 3	0 0 1 0 0 0 5	4 0 0 0 0 0 0 5	5 0 1 0 0 0 5 0 3	5 0 1 0 1 0 5 0 8		0 0 0 0 0 0 0 0	0 0 0 0 0 0 0 0	96.51 100.00 100.00 81.81 100.00 97.36 50.00 93.70	96.51 100.00 100.00 81.81 100.00 97.36 50.00 93.70	100.00 100.00 100.00 90.90 100.00 100.00 100.00 96.06
Aspen Maple Maple - Upgrade Buckeye Buckeye Buckeye - Upgrade Cypress Cypress - Upgrade Oak - Upgrade Oak - Upgrade	750 750 750 1,000 1,000 1,029 1,029 1,000 1,000	826 900 825 900 950 1,075 975 1,100 950 1,075	86 2 19 1 11 2 38 2 127 3	74 2 18 1 9 2 32 1 111 3	3 0 0 1 0 1 1 3 0	0 0 1 0 0 0 5 0	4 0 0 0 0 0 0 5 0	5 0 1 0 0 5 0 3 0	5 0 1 0 5 0 8 0	0 0 0 0 0 0 0 0 0		0 0 0 0 0 0 0 0 0 0	96.51 100.00 100.00 81.81 100.00 97.36 50.00 93.70 100.00	96.51 100.00 100.00 81.81 100.00 97.36 50.00 93.70 100.00	100.00 100.00 100.00 90.90 100.00 100.00 100.00 96.06 100.00
Aspen-Upgrade Maple - Upgrade Buckeye - Upgrade Buckeye - Upgrade Cypress - Upgrade Cypress - Upgrade Oak - Upgrade Elm	750 750 750 1,000 1,000 1,029 1,029 1,000 1,000 1,200	826 900 825 900 950 1,075 975 1,100 950 1,075 1,175	86 2 19 1 11 2 38 2 127 3 16	74 2 18 1 9 2 32 11 111 3 16	3 0 0 1 1 1 3 0 0	0 0 1 0 0 5 5 0 0	4 0 0 0 0 0 0 0 5 0 0	5 0 1 0 0 5 0 3 0 0 0	5 0 1 0 5 0 8 0 0	0 0 0 0 0 0 0 0 0	0 0 0 0 0 0 0 0 0 0	0 0 0 0 0 0 0 0 0 0	96.51 100.00 100.00 81.81 100.00 97.36 50.00 93.70 100.00 100.00	96.51 100.00 100.00 81.81 100.00 97.36 50.00 93.70 100.00 100.00	$100.00 \\ 100.00 \\ 100.00 \\ 90.90 \\ 100.00 \\ 100.00 \\ 100.00 \\ 96.06 \\ 100.00 \\ 100$
Aspen Maple - Upgrade Maple - Upgrade Buckeye Buckeye - Upgrade Cypress - Upgrade Cypress - Upgrade Oak - Upgrade Elm - Upgrade Elm - Upgrade	750 750 750 1,000 1,000 1,029 1,029 1,000 1,000 1,000 1,200	826 900 825 900 950 1,075 975 1,100 950 1,075 1,175 1,325	86 2 19 1 11 2 38 2 127 3 16 4	74 2 18 1 9 2 32 11 111 3 16 3	3 0 0 1 1 3 0 0 0 0 0	0 0 0 1 0 0 0 5 0 0 0 0	4 0 0 0 0 0 0 5 0 0 0 1	5 0 0 0 5 0 3 0 0 0 0	5 0 1 0 5 0 8 0 0 0	0 0 0 0 0 0 0 0 0 0 0 0	0 0 0 0 0 0 0 0 0 0 0 0 0 0	0 0 0 0 0 0 0 0 0 0 0 0 0 0	96.51 100.00 100.00 81.81 100.00 97.36 50.00 93.70 100.00 100.00	96.51 100.00 100.00 81.81 100.00 97.36 50.00 93.70 100.00 100.00	$100.00 \\ 100.00 \\ 100.00 \\ 90.90 \\ 100.00 \\ 100.00 \\ 100.00 \\ 96.06 \\ 100.00 \\ 100$
Aspen-Upgrade Maple - Upgrade Buckeye - Upgrade Buckeye - Upgrade Cypress - Upgrade Cypress - Upgrade Oak - Upgrade Eim - Upgrade Eim - Upgrade wait unit	750 750 750 1,000 1,000 1,029 1,029 1,029 1,000 1,000 1,200 1,200 0	826 900 825 900 1,075 1,100 950 1,075 1,175 1,325 0	86 2 19 1 11 2 38 2 127 3 16 4 0	74 2 18 1 9 2 32 1 111 3 16 3 0	3 0 0 1 1 1 3 0 0 0 0 0 0	0 0 1 0 0 0 5 0 0 0 0 0 0 0 0 0	4 0 0 0 0 0 0 5 0 0 0 1 0	5 0 1 0 0 5 0 3 0 0 0 0 0 0 0	5 0 1 0 5 0 8 0 0 0 0		0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0	0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0	96.51 100.00 100.00 81.81 100.00 97.36 50.00 93.70 100.00 100.00 100.00	96.51 100.00 100.00 81.81 100.00 97.36 50.00 93.70 100.00 100.00 100.00 0.00	100.00 100.00 100.00 90.90 100.00 100.00 96.06 100.00 100.00 100.00 100.00

To print, click PDF and then you can print the PDF.

Some helpful reports are listed below. Samples are in the following pages.

Financial

- Budget Comparison
- 12 Month Budget

Residential

- Conversion Ratios
- Box Score Summary
- Lease Expirations
- Unit Availability



Hit Generate and a new window will pop up with the report

For Cell F8- Input the total count of units that ARE NOT leased and NOT ready- Vacant Unrented Not Ready

For Cell F9- Input the total count of units that <u>ARE</u> leased but <u>NOT</u> ready- Vacant Rented Not Ready

D	E	F	G
Notes		(UA)	
		Not Ready	Ready
Not including model or	office unit.	0	0
Leased with deposits an	d sched move in	0	1

For this example, all units are ready so '0' is input. Since there is one vacant rented unit that is ready, it is showing a 1 in the Ready area (blue).

Cell G11- Input unit number of the Longest Vacant Unrented Ready unit- Note- put # sign in front of the unit number

Cell G12- Input the amount of days the Longest Vacant Unrented Ready unit has been sitting vacant

Cell G13- Input the unit number of the Longest Vacant Unrented Not-ready unit- put # sing in front of the unit number

Cell G14- Input the amount of days the Longest Vacant Unrented Not-ready unit has been sitting vacant

Cell C18- Input any specials being offered

Cell C19- Input all marketing for the week

Section should look like this:

6	Occupancy Data (Analytics-Operations-Residential-Box Score)		Notes		(UA)	
7	Total Current Vacants	1			Not Ready	Ready
8	Unrented Vacants	0	Not including model or	r office unit.	0	0
9	Rented Vacants	1	Leased with deposits ar	nd sched move in	0	1
10	Non-Revenue + Employee + Down Units	0				
11	Rented On Notice	5		Longest Vacant U	areated Ready Unit #	
12	Unrented Notices - Less than 30 Days	1	Move-Outs next 30 days	ŝ.	Days Yacant *	
13	Unrented Notices - More than 30 Days	5	Move-Outs more than 3	0 days. Longest Unre	nted not-ready unit #	
14	The figures below will automatically calculate based on the input ce	lls above			Days Yacant *	
15	Occupied % (top three lines / total units)	99.00%				
16	Actual Leased % (unrented vacants / total units)	100.00%	Leased % (un	rented + down + no	n-rev / total units)	100.00%
17	Total Exposure % (Unrented vacants & notices / total units)	6.00%	Short Term E	xp. % (Vacants & n	otices < 30 days)	1.00%
18	Specials Being Offered:	none as of 9/12/2	2016			
19	Marketing for the Week:	Craigslist, Zillow	, Rent.com, Rentlinx			



Roles

+ Analytics

+ Reports

Residential

• Unit Pricing

Revenue Management

YARDIVOYAGER

Home Help Proration Calc Sign Out

mancial

Operations

Your report is hidden while you make me

It will return when you close the menu.

Custom Financial Analytics - Notes

incial Analytics

Financial Report Notes

Custom Financials

Second Section- Budget Comparison-

Ensure Cell C20 has correct Month typed in

Pull Budget Comparison in Yardi: Analytics→Financial→Financial Analytics

- Enter Property Code
- Book is 'Cash'
- Report Type is 'Budget Comparison'
- Period is 'Current Month MM/YYYY' to 'Current Month MM/YYYY' (Ex. 09/2016 to 09/2016)

Financial Repo	orts		
Property Book Account Tree	ke cash	SUBGROUP3	Clear PDF
Report Type	Budget Comparison	SUBGROUP4	Excel
Period	09/2016 to 09/2016	Grid Freeze Pane Decimals Show Property Name Suppress Zero Sraph	
Report Columns	Actual V	Summary Tree Level 1 🔻 Show Acct. Code 🖉 Budget GL 🔻	Display

Hit Display

Cell C21- Input Total Rental Income Actual

Cell G21- Input Budgeted Total Rental Income (For this example, budgeted is Zero)

5070	TOTAL RENTAL INCOME	90,327.74	0.00	90,327.74

Cell C22- Input Net Other Income

Cell G22- Input Budgeted Net Other Income (For this example, budgeted is Zero)

5190	NET OTHER INCOME	9,886.24	0.00	9,886.24
Cell C23 v	will automatically populate which sho	ould equal Total Income on	the Budget Com	parison report

5500	TOTAL INCOME	100,213.98	0.00	100,213.98

Cell C24- Input Total Operating Expenses

7099	TOTAL OPERATING EXPENSES	48,704.38	0.00	-48,704.38
Cell G24-	Input Budgeted Total Operating Expen	ses (For this exampl	e, budgeted is Zer	·o)



Cell C25 will automatically populate which should equal the Net Operating Income on the Budget Comparison Report (Income – Expense= NOI)

7280	NET OPERATING INCOME	51,509.60	0.00	51,509.60
For Cell C2	6, click Home in Yardi and then Daily Ac	tivity.		
		Tuesday, Septemb	er 20, 2016	
		Prop/List te		
		Add Guest		Quick Guest
		Leasing Specials	D	aily Activity
		Hot Sheet	Mon	itor Reports
		New PO	Ne	w Svc. Req.
		Print Letters		

Click on the Delinquency Tab. Enter Total for Property into Cell C26

Reside	Resident Exceptions Month to Month		nth	Available Units		le Units	On Notice		Showings	
Move In Deposit Accoun		ing		Lease Expi	rations Delin	quency	Pending	Work Requests		
	Pr	operty	Туре	Unit	Code	Name	Owed	Office Phone	Home Phone	
	te - Timbercree	ek East Townhomes	te-3	1710	t0058341	Kirwin, John	1,142.00			
	te - Timbercree	ek East Townhomes	te-2	1715	t0054379	Hamilton, Tedgie	5.60		(309)781-0498	
	te - Timbercree	ek East Townhomes	te-3	1737	t0057586	Lockett, Christopher	2.33			
	te - Timbercree	ek East Townhomes	te-3	1747	t0044527	Raffurty, Angela	5.00	(913)342-2300		
	te - Timbercree	ek East Townhomes	te-2	1803	t0049804	Jamerson, Fonte	1,102.00		(913)626-1421	
	te - Timbercree	ek East Townhomes	te-3	1826	t0057091	Stone, Robert	114.00			
	te - Timbercree	ek East Townhomes	te-3	1851	t0045574	Kanies (emp), Erickia	412.00		(816)808-8789	
	te - Timbercree	ek East Townhomes	te-2	1852	t0056449	Mccorkle, Tim	5.00		(816)518-0922	

Section should look like this:

20	Budget Comparison (Analytics-Financial-Budget Comp)	September	Notes	Budget
21	Net Rental Income	90,328		0
22	Net Other Income	9,886		0
23	Total Income	100,214		0
24	Total Operating Expenses	48,704		0
25	Net Operating Income	51,510		0
26	Delinquents Presently (Daily Activity)	2,788		

Third Section- Gross Potential Rent-

Ensure Cell C27 has correct Month typed in



Pull Gross Potential Rent report in Yardi- Analytics → Operations → Residential Analytics



Enter Property Code

Month / Year – must be current month in MM/YYYY format (Month / Year must be for current month or report will not pull correctly)

Report Type is 'Gross Potential Rent'

Summarized by 'Property'

Residential Reports												
Property Unit Type Unit Gross Potential Rent Trabercreek East Townhomes (te) Ae 0f = 09/30/2016 Worth Year = 09/2016	Date Month / Year Report Type Summarize By	09/01/2016 01/2017 Gross Potentia Property	to I Rent	09/30/2016 09/2016 ▼	Sha Sha	w Graphs w Grids	Excel Display	PDF Clear				
Property	Unit Count	Occ Vaca Units Uni	nt Non-Rev s Units	Market Rent	Loss/Gain to Lease	Potential Rent	Vacancy	Actual Rent	Con- cession	Write Off	Rental Income	Receipts Current
te - Timbercreek East Townhomes	101	100	1 0	98,510.00	2,292.00	96,218.00	3,123.99	93,094.01	-737.00	0.00	92,357.01	89,028.64

Cell C28- Input Total Market Rent

Cell C29- Input Loss/Gain to Lease

Cell C31- Input Vacancy

Cell C33- Input Total Concessions

Cell C34- Input Total Write Off

Section should look like this:

27	Gross Potential Rent (Analytics-Operations-Residential Analytics)	September	Notes	
28	Total Market Rent	98,510		
29	Total Loss to Lease	2,292		
30	Total Potential Rent	96,218		
31	Total Vacancy Charge	3,124		3.2%
32	Total Actual Rent Charge	93,094		
33	Total MTD Concessions	(737)		-0.8%
34	Total MTD Write Off	0	1	
35	Total Rent	92,357		



Fourth Section- Traffic Month to Date-

Pull Conversion Ratios Report in Yardi- Analytics → Operations → Residential Analytics

YARDIVOY	GER
	Home Help Proration Calc Sign Out
	Community Manager Dashboard - I
 Roles Analytics Reports Residential Unit Pricing Revenue Management 	Resident Activity Move In Financial Counting Operations Accounting Operations Accounting Expiring Residential Analytics Schedu Service Request Analytics

- Enter Property Code
- Date is for Current month first day of month to last day of month (M/1/YYYY-M/31/YYYY)
- Report Type is 'Conversion Ratios'
- Summarize by 'Source'

Residential Repo	rts						
Property Unit Type	te	Date Month / Year	09/01/2016 to	09/30/2016	1		
<u>onic rype</u>		Report Type	Conversion Ratios	09/2016	Show Graphs	Excel	PDF
		Summarize By	Source	۲	Show Grids	<u>D</u> isplay	Clear

Hit Display

Conversion Ratios Timbercreek East Townhomes (te)																		
Date = 09/01/2016-09/30/2016								Ungualified				Gross		Qualified				Net
Name	Call	Walk-in	Email	Other	SMS	Web	Chat	First Contact	Show	Applied	Approved	Conversion Ratio	Shows	Conversion Ratio	Denied	Cancels	Re-Apply	Conversion Ratio
ABODO	0	0	0	0	0	0	0	0	0	0	0	0.00	0	0.00	0	0		0.00
Apartment Guide	0	0	0	0	0	0	0	U	0	0	0	0.00	0	0.00	0			0.00
ApartmentFetch	0	0	0	0	0	0	0	0	ő	0	0	0.00	0	0.00	0	, in the second se		0.00
ApartmentFinder	0	0	0	Ō	0	0	Ō	ō	0	0	Ō	0.00	0	0.00	0	() (0.00
ApartmentList	1	1	0	0	0	0	0	0	0	0	0	0.00	0	0.00	0	() (0.00
Apartments.com	0	0	0	0	0	0	0	0	0	0	0	0.00	0	0.00	0	() (0.00
Apartments.com/CoStar	0	0	0	0	0	0	0	0	0	0	0	0.00	0	0.00	0			0.00
Apartmentsearch.com Bing	1	0	1	0	0	0	0	0	1	1	1	100.00	0	100.00	0			0.00
Brochure	0	0	0	0	0	0	0	0	0	0	0	0.00	0	0.00	0			0.00
Condo.com	ů.	ŏ	ő	ő	ő	ŏ	ŏ	ő	0	ő	ő	0.00	ő	0.00	0	Č		0.00
Corporate Website	0	0	0	0	0	0	0	0	0	0	0	0.00	0	0.00	0	() (0.00
Craigs List	9	2	1	0	0	0	0	0	7	2	4	28.57	0	28.57	0	1	L (14.29
Direct Mailer	0	0	0	0	0	0	0	0	0	0	0	0.00	0	0.00	0	() (0.00
Drive-by	2	1	1	0	0	0	0	0	2	2	3	100.00	0	100.00	0			0.00
Facebook For Dopt Magazing	0	0	0	0	0	0	0	U	0	0	0	0.00	0	0.00	0			0.00
For Rent Market Place	0	0	0	0	0	0	0	0	0	0	0	0.00	0	0.00				0.00
ForRent.com	ő	ő	1	ŏ	ŏ	ŏ	ŏ	ő	ŏ	ő	ő	0.00	ő	0.00	ŏ	č		0.00
FP Sister Property	0	0	0	0	0	0	0	0	0	0	0	0.00	0	0.00	0	() (0.00
Google	0	0	6	0	0	0	0	0	0	0	1	0.00	0	0.00	0	() (0.00
HotPads	0	0	0	0	0	0	0	0	0	0	0	0.00	0	0.00	0	() (0.00
Hotpads.com	0	0	0	0	0	0	0	0	0	0	0	0.00	0	0.00	0	() (0.00
HotPads/ Irulia/Zillow	0	0	0	0	0	0	0	0	0	0	0	0.00	0	0.00	0	(0.00
Local/Walkin	0	0	0	0	0	0	0	0	0	0	0	0.00	0	0.00	0			0.00
Move.com	0	0	0	0	0	0	0	0	0	0	0	0.00	0	0.00		, in the second s		0.00
MyNewPlace	0	0	0	0	0	0	0	0	0	0	0	0.00	0	0.00	0	() (0.00
Newspaper	0	0	0	0	0	0	0	0	0	0	0	0.00	0	0.00	0	() (0.00
On Site Transfer	0	0	0	0	0	0	0	0	0	0	0	0.00	0	0.00	0	() (0.00
Online-Other	0	0	0	0	0	0	0	0	0	0	0	0.00	0	0.00	0			0.00
Other Apt Complex	0	0	0	0	0	0	0	U	0	0	0	0.00	0	0.00	0			0.00
Previous Resident	0	0	0	0	0	0	0	0	0	0	1	0.00	0	0.00	0			0.00
Print Material	0	0	ō	ō	0	0	0	0	0	0	0	0.00	0	0.00	0			0.00
Property Website	0	0	0	0	0	0	0	0	0	0	0	0.00	0	0.00	0	() (0.00
Realtor.com	0	1	0	0	0	0	0	0	1	0	0	0.00	0	0.00	0	() (0.00
Referrals	0	0	0	0	0	0	0	0	0	0	0	0.00	0	0.00	0	() (0.00
Rent.com	0	0	0	0	0	0	0	0	0	0	0	0.00	0	0.00	0	(0.00
Pentalhomesnlus com	0	0	0	0	0	0	0	0	0	0	0	0.00	0	0.00	0			0.00
Rentalhouses.com	ő	ő	ő	ő	ő	ő	ő	0	ŏ	ő	0	0.00	ő	0.00	ő	č		0.00
Rentals.com	1	ō	3	ō	Ō	0	Ō	ō	0	0	ō	0.00	ō	0.00	0	() (0.00
RENTCafe.com ILS	0	0	0	0	0	0	0	0	0	0	0	0.00	0	0.00	0	() (0.00
RentJungle	0	0	0	0	0	0	0	0	0	0	0	0.00	0	0.00	0	() (0.00
RentLinx	0	0	0	0	0	0	0	0	0	0	0	0.00	0	0.00	0			0.00
Rentometer Desident Deferral	0	0	0	0	0	0	0	0	0	0	0	0.00	0	0.00	0			0.00
Showmetherent.com	0	0	0	0	0	0	0	0	0	0	0	0.00	0	0.00	0			0.00
Social-Other	ő	ŏ	ő	ő	ő	ŏ	ŏ	ů.	ŏ	ő	ő	0.00	ő	0.00	ő	Č		0.00
Trovit	ō	ō	ō	ō	ō	ō	ō	ō	ō	ō	ō	0.00	ō	0.00	0	Ċ	, i	0.00
Trulia	0	0	2	0	0	0	0	0	1	0	0	0.00	0	0.00	0	() (0.00
Website Apartments 24/7	0	0	0	0	0	0	0	0	0	0	0	0.00	0	0.00	0	() (0.00
Word of Mouth	0	0	2	0	0	0	0	0	1	1	0	100.00	0	100.00	0	1	L (0.00
Yellow pages	0	0	0	0	0	0	0	0	0	0	0	0.00	0	0.00	0			0.00
Yeip Zillow	0	0	0	0	0	0	0	0	0	0	0	0.00	0	0.00	0	(0.00
Zumper/PadManner	2	0	26	0	0	0	0	0	3	1	2	0.00	0	0.00	0			0 000
AnartmentGuide.com	0	0	1	0	0	0	0	0	0	0	0	0.00	0	0.00	0			0.00
N/A	0	ŏ	1	0	0	ő	ő	0	ő	0	0	0.00	0	0.00	0	i i i		0.00
Total	16	5	45	0	0	0	0	0	16	7	12	43.75	0	43.75	0	4	i (18,75



- Cell G38- Input total number of Calls
- Cell G39- Input total number of Walk-in
- Cell G40- Input total number of Email + Web Leads
- Cell C38- Input total number of Unqualified First Contacts
- Cell C40- Input total number of Shows
- Cell C42- Input total number of Applied
- Cell C43- Input total number of Approved
- Cell C44- Input total number of Cancels
- Cell C45- Input total number of Denials
- Cell G42- Input the highest number listed in the CALL section (for this example, it will be 6)
- Cell E42- Input the Traffic Source with the highest number in CALL section (for this example it will be Craigslist)



FIRST PACIFIC FIRST PACIFIC GROUP, INC.

- Cell G43- Input the highest number listed in the EMAILS + WEB section (for this example, it will be 26)
- Cell E43- Input the Traffic Source with the highest number in EMAILS + WEB sections (for this example it will be Zillow)

Name	Call	Walk-in	Email	Other	SMS	Web
ABODO	0	0	0	0	0	0
Apartment Guide	0	0	0	0	0	0
Apartment Ratings	0	0	0	0	0	0
ApartmentFetch	0	0	0	0	0	0
ApartmentFinder	0	0	0	0	0	0
ApartmentList	1	1	0	0	0	0
Apartments.com	0	0	0	0	0	0
Apartments.com/CoStar	0	0	0	0	0	0
ApartmentSearch.com	1	0	1	0	0	0
Bing	0	0	0	0	0	0
Brochure	0	0	0	0	0	0
Condo.com	0	0	0	0	0	0
Corporate Website	0	0	0	0	0	0
Craigs List	9	2	1	0	0	0
Direct Mailer	0	0	0	0	0	0
Drive-by	2	1	1	0	0	0
Facebook	0	0	0	0	0	0
For Rent Magazine	0	0	0	0	0	0
For Rent Market Place	0	0	0	0	0	0
ForRent.com	0	0	1	0	0	0
FP Sister Property	0	0	0	0	0	0
Google	0	0	6	0	0	0
HotPads	0	0	0	0	0	0
Hotpads.com	0	0	0	0	0	0
HotPads/Trulia/Zillow	0	0	0	0	0	0
Leasing Office Operations	0	0	0	0	0	0
Local/Walk-in	0	0	0	0	0	0
Move.com	0	0	0	0	0	0
MyNewPlace	0	0	0	0	0	0
Newspaper	0	0	0	0	0	0
On Site Transfer	0	0	0	0	0	0
Online-Other	0	0	0	0	0	0
Other Apt Complex	0	0	0	0	0	0
PadMapper	0	0	0	0	0	0
Previous Resident	0	0	0	0	0	0
Print Material	0	0	0	0	0	0
Property Website	0	0	0	0	0	0
Realtor.com	0	1	0	0	0	0
Referrals	0	0	0	0	0	0
Rent.com	0	0	0	0	0	0
RentalAds.com	0	0	0	0	0	0
Rentalhomesplus.com	0	0	0	0	0	0
Rentalhouses.com	0	0	0	0	0	0
Rentais.com	1	0	3	0	0	0
RENTCate.com ILS	0	0	0	0	0	0
RentJungle	0	0	0	0	0	0
RentLinx	0	0	0	0	0	0
Rentometer	0	0	0	0	0	0
Resident Referral	0	0	0	0	0	0
Showmetherent.com	0	0	0	0	0	0
Social-Other	0	0	0	0	0	0
Trovit	0	0	0	0	0	0
Trulia	0	0	2	0	0	0
Website Apartments 24/7	0	0	0	0	0	0
Word of Mouth	0	0	2	0	0	0
Yellow pages	0	0	0	0	0	0
Yelp	0	0	0	0	0	0
Zillow	2	0	26	0	0	0
Zumper/PadMapper	0	0	0	0	0	0
ApartmentGuide.com	0	0	1	0	0	0
NIA	0	0	1	0	0	0
N/A						0

- Cell G44- Input the highest number listed in the WALK-IN section (for this example, it will be 2)
- Cell E44- Input the Traffic Source with the highest number in WALK-IN section (for this example it will be Craigslist)
- Cell C45- Input total Active Prospects from the Prospect Pipeline on the Home screen in Yardi under the Traffic

Traffic	
Prospect Pipeline	<u>68</u>
Today's Showings	0
On Waitlist	<u>1</u>
Pending Applications	<u>4</u>

Cell C46- Enter total of Craigslist Postings for the week reporting on



• For Cells C49, C50, G49 and G50, pull the Resident Activity Detail report in Yardi-Analytics→Operations→Residential Analytics



- Enter Property Code
- Date is for Current month first day of month to last day of month (M/1/YYYY-M/31/YYYY)
- Report Type is 'Resident Activity'
- Summarize By 'Property'

	Totals	100	9	0	1	0	6	0	7	3
te	Timbercreek East Townho	100	9	0	1	0	6	0	7	3
Property	Name	Units	Move In	Reverse Move In	Move Out	Cancel Move Out	Notice Skip Early Term	Cancel Notice	Rented	Canceled Application
Resider Timbercreek Date = 09/02	1t Activity East Townhomes (te) 1/2016-09/30/2016	Summarize By	Residen Property	/		T III	Show Graphs Show Grids	<u> </u>	Qisplay	Clear
<u>Property</u> <u>Unit Type</u>	te	Date Month / Year	09/01/2	016 t o	09/30/20 09/2016	016			Excel	PDF
Resident	ial Reports									

- Cell C49- Input total number of Move-Ins for the month
- Cell C50- Input total number of Move-Outs for the month
- For Cell G49, you will have to click into the hyperlink number for Move-ins.



This will bring up a window showing all of the move-ins for the month.

Residen Timbercreek B Date = 09/01	t Activi East Townho /2016-09/30	t y Detail mes (te) /2016						
Property	Unit	Unit Type	Resident	Date	Status	Rent	Deposit	Move In
te	1826	te-3	Robert Stone	09/01/2016	Move In	1,040.00	350.00	09/01/2016
te	1810	te-3	Michael Hipkiss	09/09/2016	Move In	1,030.00	350.00	09/09/2016
te	1726	te-3	Alexa Moore	09/09/2016	Move In	1,040.00	350.00	09/09/2016
te	1737	te-3	Christopher Lockett	09/09/2016	Move In	1,030.00	350.00	09/09/2016
te	1867	te-3	Shelly Butcher	09/10/2016	Move In	1,040.00	350.00	09/10/2016
te	1746	te-3	Krisha Anderson	09/13/2016	Move In	1,040.00	1,040.00	09/13/2016
te	1766	te-3	Regina Webb	09/16/2016	Move In	1,040.00	350.00	09/16/2016
te	1741	te-3	Jacob Raffurty	09/16/2016	Move In	1,030.00	350.00	09/16/2016
te	1710	te-3	John Kirwin	09/19/2016	Move In	1,040.00	350.00	09/19/2016
			Count = 9			9,330.00	3,840.00	

• Cell G49- Input the total number of move-ins that occurred in the week reporting for (last Monday-Sunday)



For Cell G50, you will have to click into the hyperlink number for Move-outs.

Move Out

This will bring up a window showing all of the move-outs for the month.

Residen Timbercreek E Date = 09/01/	t Activity ast Townhome /2016-09/30/20	Detail es (te) 016						
Property	Unit	Unit Type	Resident	Date	Status	Rent	Deposit	Move In
te	1867	te-3	James Booker (emp)	09/06/2016	Move Out	1,030.00	100.00	03/28/2015
			Count = 1			1,030.00	100.00	

Cell G50- Input total of move outs that occurred in the week reporting for (last Monday-Sunday)

Section should look like this:

Traffic Month to Date (Analytics-Operations-Res-Conversion Ratios by Sour	September	Notes		Zillow, Craigslis	st
Total First Contact (From Right of this Section)	66				
Total Unqualified Traffic	0			Calls	16
Net Traffic	66			Walk Ins	5
Total Number of Shows	16			Emails	45
Shows per First Contact Ratio	24%	Top Campaigns (Lea	<u>d Source)</u> T	otal First Contact	66
Applied	7	Phone	Craiglist	Phone traffic>	9
Approved	12	Email	Zillow	Email traffic>	26
Cancel	4	Walk-In	Craiglist	Walk-In traffic>	2
Denials	0	Ac	tive Prospects (F	Prospect Pipeline)	64
Gross Closing % (# Applied / # of Shows)	44%		Weekly C	raigslist Postings	21
Net Closing Ratio (# Approved / # Shows)	75%				
% of Applications Approved (# Approved / # Applied)	171%				
Number of Move-Ins for the Month (Resident Activity Detail)	10		Mov	ve-Ins For the Week	2
Number of Move-Outs for the Month (Resident Activity Detail)	1		Move	-Outs For the Week	0

Fifth Section- Renewals-

Open up renewal worksheet from server-Site Server \rightarrow Lease Documents \rightarrow Renewals \rightarrow Year \rightarrow Current spreadsheet

- Cell C52- Total number of Leases expiring for current month
- Cell C53- Total number of renewals of those expiring for current month
- Cell C54- Total number of MTM renewals of those expiring for current month
- Cell C55- Total number of notice to vacate of those expiring for current month
- Cell C56- Total number of skips/no notice/evictions of those expiring for current month
- Cell C57- Total number still unresolved of those expiring
- Cell C58 will automatically populate to show total percentage of successful renewals
- Cell G52 will automatically populate with 'Yes' if all number input into C53-C57 equal the amount of C52 (Total number of leases expiring. Will populate with 'Error' if the numbers do not add up.
- For Cells G54 & G55, will need to go to Daily Activity from Home screen in Yardi.



Tuesday, September 2	20, 2016
Prop/List te	
Add Guest	Quick Guest
Leasing Specials	Daily Activity
Hot Sheet	Monitor Reports
New PO	New Svc. Req.
Print Letters	

Cell E54- Input total number of Month to Month residents

	Month to Month													
Property	Туре	Unit	Code	Name	Month to Month Charge	Lease From	Lease To							
te	te-3	1700	t0044485	Klausen, Paul	150.00	4/1/2014	6/30/2014							
te	te-2	1855	t0047784	Durant, Sherron	150.00	2/7/2015	3/31/2016							
te	te-3	1831	t0044559	Peters, Ed	150.00	7/1/2015	6/30/2016							
te	te-2	1742	t0049916	Simpson, Clifton	150.00	7/6/2015	7/31/2016							
te	te-2	1743	t0044523	Clark, Eva	150.00	7/1/2015	7/31/2016							
te	te-3	1857	t0044580	Gulak, Inna	0.00	8/1/2012	8/1/2013							
te	te-3	1851	t0045574	Kanies (emp), Erickia	0.00	6/6/2014	1/31/2016							
Month to M	1onth:	7												

For Cell E55, will need to go down to the On Notice Section

	On Notice													
Property	Туре	Unit	Code	Name	Notice Date	Move Out Date	Reason for Move Out	Future Resident	Move In Date					
te	te-2	1842	t0044568	Chatman, Justine	7/27/2016	9/30/2016	Rent Too High	t0058093	10/7/2016					
te	te-2	1803	t0049804	Jamerson, Fonte	7/7/2016	9/30/2016	Closer to Work							
te	te-2	1714	t0050568	Carpenter, Angela	7/29/2016	9/30/2016	Purchased Home							
te	te-3	1821	t0053357	Hritz, David	7/21/2016	9/30/2016	Personal							
te	te-3	1847	t0054880	Tompkins, Aaron	7/27/2016	9/30/2016	Employment Transfer	t0058373	10/7/2016					
te	te-2	1745	t0051148	Brooks, Heather	9/1/2016	10/31/2016	Military Transfer							
te	te-2	1822	t0051631	Fredman, Nicole	9/1/2016	10/31/2016	Personal							
te	te-3	1730	t0046666	Matusiak, Brad	9/1/2016	10/31/2016	Employment Transfer							
te	te-2	1723	t0046779	Cochran, Amy	9/16/2016	11/30/2016	Relocate Outside of Market							
te	te-3	1850	t0054231	Hicklin, Stephanie (EMP)	9/13/2016	11/30/2016	Eviction							
te	te-2	1704	t0047519	Wilson, Alisha	9/2/2016	12/31/2016	Personal							
On Notic	e: 11													

Will need to click into the Resident t-code to see if they are MTM. Will need to count total number of residents who are on Month to Month <u>AND</u> on notice to vacate.

- Cell E55 Input total number of residents who are on notice to vacate that are month to month
- Cell E56 Input when their rent charges were last updated
- Cell E57 List the unit numbers that are MTM

Section should look like this:

51	Rene	wals	September	Notes - List Unit Num	nbers		
52		Total Leases Expiring by Month End	8		All Leases	Accounted For:	Yes
53		Renewals to Date (Month to Date) (Of those Expiring)	2				
54		MTM Renewals (Of those Expiring)	0			MTM-Current:	7
55		Notices to Move (Of those Expiring)	5			MTM-Notices:	0
56		Skip / No Notice / Evictions (Of those Expiring)	0				
57		Unresolved (Of those Expiring)	1				
58		Successful Renewal Percentage (Month to Date)	25%	Renewals to Date / To	tal Leases Exprir	a by Month End	



Sixth Section- Evictions in Process-

From home screen in Yardi, go to Daily Activity and then the On Notice Section

	On Notice													
Property	Type	Unit	Code	Name	Notice Date	Move Out Date	Reason for Move Out	Future Resident	Move In Date					
te	te-2	1842	t0044568	Chatman, Justine	7/27/2016	9/30/2016	Rent Too High	t0058093	10/7/2016					
te	te-2	1803	t0049804	Jamerson, Fonte	7/7/2016	9/30/2016	Closer to Work							
te	te-2	1714	t0050568	Carpenter, Angela	7/29/2016	9/30/2016	Purchased Home							
te	te-3	1821	t0053357	Hritz, David	7/21/2016	9/30/2016	Personal							
te	te-3	1847	t0054880	Tompkins, Aaron	7/27/2016	9/30/2016	Employment Transfer	t0058373	10/7/2016					
te	te-2	1745	t0051148	Brooks, Heather	9/1/2016	10/31/2016	Military Transfer							
te	te-2	1822	t0051631	Fredman, Nicole	9/1/2016	10/31/2016	Personal							
te	te-3	1730	t0046666	Matusiak, Brad	9/1/2016	10/31/2016	Employment Transfer							
te	te-2	1723	t0046779	Cochran, Amy	9/16/2016	11/30/2016	Relocate Outside of Market							
te	te-3	1850	t0054231	Hicklin, Stephanie (EMP)	9/13/2016	11/30/2016	Eviction							
te	te-2	1704	t0047519	Wilson, Alisha	9/2/2016	12/31/2016	Personal							
On Notic	e: 11													

Find residents with Reason for Move out as Eviction

- Cell C60- Input total number of evictions in progress
- Cell D60- Input unit numbers of all residents under eviction
- Cell G60- Input total number of current evictions that were sent over in the current month reporting
- Cell C61- Will need to add up the total balances for all residents under eviction. Best way to find this
 number is by clicking on the t-codes for the residents under eviction and opening up the ledgers. Write
 the number down and add up.

Section should look like this:

59	Evictions in Process - Current		Notes - List Unit Numbers				
60	Number of Residents Filed on - Active	1	#1850		This Month	1	
61	Delinquency (\$) Associated with those Filed On	1,685					

Seventh Section- Maintenance Summary-

Cell C63- Input total number of outstanding work orders from Home screen in Yardi under maintenance

Maintenance	
Pending Make Ready	<u>11</u>
Pending Work Requests	22
Completed WO Followup	<u>13</u>

• Pull Review Service Request Report by going to Service Request → Review Service Request



	Review Service Request
Unit Asset	Add Service Request
	Review Recurring Service Request
	Add Recurring Service Request
	Post Recurring Service Request
	Review Service Request Template
	Add Service Request Template
	Pending Work Requests
	Employee WO Time

- Enter Property Code
- Work Compl. Dates need to be for the last week reporting (Monday-Sunday)
- All other fields are left blank

Work Order					
Property	te	Timbercre	ek Eas	st Townhomes	
<u>wo</u>					
<u>Unit</u>					
Building					
Bill to Tenant					
Recurring WO					
Category	A/C Blinds Boiler	* •			
Item Type					
Batch Name					
Vendor					
Employee					
Created By					
Status	Call Canceled In Progress	*			
Priority	High Priority Medium Priority Low Priority				
Origin	WO SR PM V				
Call Date			-to-		
Scheduled Date			-to-		
Work Compl.	09/12/2016		-to-	09/18/2016	
Due Date			-to-		
Display Rows	500				
	Submit <u>C</u>	lear	Hel	p	
				P	

Hit Submit. This will bring up a new window that shows the amount of work orders that were closed out during that time frame.

Work Order 🕷		Ŧ X
Show 10 T entries	Search:	
Co	de	0
236625 - Utility Closet is flooded 236624 - no a/c fan is coming on 236597 - two move in issues		
Showing 1 to 3 of 3 entries	First Previous 1 Next	Last

- Cell G63- Input total number of work orders completed last week (Monday-Sunday).
- For Cell C64, Click Home in Yardi and under Maintenance, click Pending Make Ready

ridifice	
Pending Make Ready	<u>11</u>
Pending Work Requests	22
Completed WO Followup	13

A report will come up showing all of the pending make readies. Click on the Date Ready Column to sort it by most recent.

Calendar	Pending	Make Ready	- 09/20/201	6 Pe	erson Search		
M							
Bedrooms	Rent	SqFt	Date Ready	Unit	Occupancy	Make Ready	Adjust Date
2	930.00	1245.000000	10/07/2016	<u>1803</u>	Applicant		
3	1,040.0 0	1350.000000	10/07/2016	<u>1821</u>	Notice		
2	930.00	1245.000000	10/07/2016	<u>1842</u>	Future		
3	1,040.0 0	1350.000000	10/07/2016	<u>1847</u>	<u>Future</u>		
2	930.00	1245.000000	10/14/2016	<u>1714</u>	Applicant		
3	1,040.0 0	1350.000000	11/08/2016	<u>1730</u>	Applicant		
2	930.00	1245.000000	11/08/2016	<u>1822</u>	Notice		
2	930.00	1245.000000	11/09/2016	<u>1745</u>	Notice		
2	930.00	1245.000000	12/02/2016	<u>1723</u>	Notice		
3	1,040.0 0	1350.000000	12/07/2016	<u>1850</u>	Eviction		
2	930.00	1245.000000	01/11/2017	<u>1704</u>	Notice		

- Cell C64- Enter total number of units scheduled to turn this week
- Cell G64- Enter total number of units that were turned last week

Section should look like this:

62	Maintenance Summary - (Analytics-Operations-Service Request Ana	Notes				
63	Number of Outstanding Work orders	22	Number of V	Vork Orders Comp	leted Last Week	3
64	Number of Units Scheduled to Turn This Week	0	1	Number of Units Tu	urned Last Week	0
65	Unit Numbers					

Eighth Section- Staffing Summary

- C67- List all open positions
- C68- List where advertising for the open positions
- C69- List who is managing the ads
- C70- List any updates since the last Monday report concerning staff (Ex. Notice given, quit no notice, leaves of absence, etc.)

Section should look similar to this. If no open positions, input none on each line.

66	Staffing Summary	Notes
67	List Open Positions (Job titles)	Maintenance Techs
68	Where are you advertising (CL, ZipRecruiter, Indeed, Other)	Craigslist, Indeed, Word of mouth
69	Who is managing ads (PM, RPM, Corporate, Other)	Regional Manager/ Community Manager
70	Notes/Status Updates/Changes Since Last Week	no changes

Ninth Section- Preventive Maintenance and Projects for the Week

Enter any projects happening for the current week or what is being worked on at the property

Preventive Maintenance and Projects for the Week				
1	Continue to get work orders caught up	Push Renewals		
2	Continue to get Grace Hill caught up	Lease 4 apartments		
3	Boiler inspections on Tuesday	Train Riley		

Market Survey Comp/Deposits & Fees/ Amenity Comp Tabs

- Update each tab with the current Market Survey information. Should be updated weekly.



The green cells in the Market Survey should be updated weekly with the latest specials, rents, and fees. Market Survey should be updated with the latest rent prices for our comps.



As the rents are upgraded the "Price per Square Foot" will be recalculated and will adjust on the graphs below.

*It is very important that the Market Survey is updated every other week so we know where we stand with our competitors for current rents and specials being offered. It should be completed by the 1st and 3rd Saturday of the month as noted on the task calendar.

Once everything has been updated and saved the Manager will then email the report to their Regional and save it in the Weekly Report folder on the server in the correct Month-Year folder.

 The Manager needs to provide a summary of the information contained in the report. Included in this summary is why we are doing great or what we need to improve on and how the current and future operations look (good or bad). The summary should demonstrate the Manager understands the contents of the report and allow for anyone reading it to get a quick snapshot on how the property is performing.
Write-offs

- You will receive a monthly delinquency spreadsheet from your Accountant once they have finished completing your properties Tie-Out Report for the month.
- You will use this spreadsheet and add notes to the right-hand side for all accounts you have sent to collections and are actively working on in-house to collect.
- The notes need to be detailed with the date you sent them to collections and the company they were sent to.
- Try to collect as much money as possible in-house and send past residents to collections after 90 day of attempts.
- Please highlight the lines that were sent to collections, leave in-house collections unhighlighted.
- Send this to your Regional by the end of the month so they can write these off for the month.
- No adjustments should be made to a ledger once the balance has been written off. You can leave a memo for any errors discovered including the new amount due & notify the collection agency, but making changes to correct the ledger after write offs is not possible.
- If a tenant has all of their charges written off and then begins making payments, the tenant should be charged back for the same amount as we are receiving so that their ledger is at a \$0 balance after posting the receivable. The Manager is responsible for charging back the tenant via Quick Charge (NOT adjust deposit accounting) and should always use the Bad Debt Recovery (5110) code regardless of what the charges were when they were written off.
- > The accountant will do all write offs. Please send to them once everything is completed.

Delinquency												
As Of: 1/26/2015												
Property	Tenant	Tenant	Tenant	Total	Future	0-30	31-60	61-90	Over 90	Proposito	Total	Sent to collections
Unit	Code	Last Name	Status	Charges	Charges	Owed	Owed	Owed	Owed	riepayments	Owed	
cb - Cedar Brooke Apartments												
1102	t0042365	Rhodes	Past	1350	0	1350	0	0	0	0	1350	FCO12/30/2014
1402	t0042226	Ciafullo	Past	60	0	60	0	0	0	0	60	
1904	t0039028	Reeves	Past	717.16	0	0	717.16	0	0	0	717.16	FCO 1/26/2015
2704	t0041375	Williams	Past	201.81	0	0	201.81	0	0	0	201.81	FCO 12/10/2014
Total cb - Cedar Brooke Apartments				2,328.97	0.00	1,410.00	918.97	0.00	0.00	0.00	2,328.97	
cr - Cedar Ridge Apartment Homes, LLC												
15420	t0046563	Bell	Past	1683.48	0	0	0	1683.48	0	0	1683.48	In house
15500D	t0042078	Palmer	Past	898.91	0	0	0	0	898.91	0	898.91	In house
15508B	t0043530	Boussid	Past	708.9	0	0	0	0	708.9	0	708.9	Elite 11/2014
15508D	t0042240	Ferguson	Past	2050.65	0	0	2050.65	0	0	0	2050.65	FCO 1/26/2015
15512C	t0044360	Osborne	Past	2482.87	0	0	1080.87	912	490	0	2482.87	FCO 1/26/2015
15517	t0044433	Jaqua	Past	1881.31	0	0	1881.31	0	0	0	1881.31	FCO 1/26/14
15540D	t0042823	Wyatt	Past	0	0	0	0	0	0	1261.19	-1261.19	In house
15905C	t0045943	Flores	Past	746.56	0	691.9	54.66	0	0	0	746.56	In house
4609	t0045983	Williams	Past	2139.58	0	0	2139.58	0	0	0	2139.58	FCO 1/26/2015

Bad Debt

In an effort to collect more bad debt money in house before sending to FCO, we will offer a one time 25% off settlement fee on the FINAL attempt before sending to FCO. There are letters in residential correspondence to help in your collection efforts. Here is the timeline for bad debt collections:

- Within 10 days of move out complete deposit accounting
- Accountant will send move out statement with balance owed letter
- 30 days after move out email move out statement and follow up for payment or payment arrangement. You can use the attached 30-day letter.
 - We allow 6 months to pay off \$999 or less and 12 month to pay off \$1,000 or greater. You will need approval from your Regional if you need an arrangement other than this.
- 60 days after moveout- send another reminder that a balance is owed, and they are at risk of being sent to collections
- 75 days after move out send the bad debt settlement. They will have 15 days to pay the settlement amount in full
- 83ish days- Accountants will reach out to all Bad Debt one final time before sending to FCO, making sure they received the 25% off offer with a reminder they will be sent to collections in 7 days.
- 90 days send to FCO
- Please note the above is the minimum contact so please work bad debt as often as possible at time permits.
- Please let your Area Manager know if you have any questions or other great ideas of how else to collect on bad debt.

To email Bed Debt – 30 Day or Bad Debt Settlement notices from Residential Correspondence make sure to enter the Resident's t-code so that you are only emailing those you specifically want to send to.

Bookkeeping Reminders/Policy

1. Please ensure you are scanning payable batches in order and with all invoices. They should then be saved to the server for your regional to review.

2. On the batch payable screen, be sure Declared=Entered for both the total and # of items.

3. Enter payable batches at least once a week or more as needed. This will help keep the number of invoices per batch down and will ensure all bills get paid in a timely manner. Especially important near the end of the month when we want to make sure to get all expenses in before the end of the month.

4. Yardi tracking for resident referral - both who referred and who was referred should be recorded in Yardi. Ideally, the referral unit/name should be added to the resident's Referral concession charge note. If using lease charges, add a memo. Attach referral concession sheet to resident's file.

5. Move Out Policy - you have 10 days to process Deposit Accounting after the resident moves out. This should leave plenty of time to get the apartment turned and all chargebacks entered via estimates per the Walkthrough. Please check utility bills for chargebacks online. All deposit accounting must be completed within the allotted time legally required by state & mailed to the Accountant as soon as it's ready to be reviewed.

6. Send Ledger for cancels/denials as the Move Out Statements are usually blank. Only need to send if a refund is owed or special circumstance.

7. Please don't complete any more Deposit Accounting after the 25th until the next month. This will make it easier to ensure all refund checks for processed MO's have been cut before the month ends. <u>You will still</u> process the move out after the 25th but hold off on the deposit accounting until the next month.

8. We can no longer refund overpayments for residents. Overpayments are due to resident error and will sit as a credit on their ledger until the next charge. Processing refunds takes time in admin processing, and we have had numerous situations where the double payment is then cancelled via credit card which takes hours to straighten out.

9. Residents are responsible for a \$25 check reissue fee for a lost check, or if they failed to update the office with their forwarding address. If the resident left an accurate forwarding address and 21 days have passed after the check has been cut, FG will put a stop payment on the original check and recut free of charge, assuming the check has been lost in the mail.

10. We no NOT accept temporary checks with a handwritten account number.

11. If residents are on a lease that requires 60 days' notice but will only require 30 days' notice after going MTM, we must charge for the full 60 days' notice required before their lease is up, even if given only one day before lease expiration. Everyone must be consistent with this and all charges so as to be Fair Housing compliant.

12. Use the "Move Out Calculator" button, found on the resident screen under Functions, to find out what amount will be due at Move Out.



Bookkeeping Reminders/Policy

13. After the move-out day you may only hold a home for _____ days and then the new resident needs to take possession. If the home is already vacant, then they must take possession within _____ days. By taking possession they do not have to physically move-in, however their lease would start this day and they begin paying this day. In all other situations the waitlist option should be utilized until a home is available for them. Please contact your Regional Manager if you have any questions.

14. When a resident on an old lease (non-FPG lease) breaks their lease, the Rent through the lease end charge should be coded to **5168 Term Fee** with the ledger note:

• Lease Termination: charge for rent through lease end

Also, make sure you are coding the fee for not giving 60-day notice to **5164 Notice fee.** This should NOT be coded to rent

15. In states where residents can still reside in their homes after paying off evictions, we will send a 30-day notice after filing a second eviction.

16. Vendor utility refund checks should be coded as a credit to reduce the expense of the month, rather than 5170 Utility Reimbursement, which is used when we charge back utilities to resident ledgers. This was the 5170 category will truly show resident utility income on the financials.

17. No Utility chargebacks should be added to ledgers for:

- less than 3 days of service or less than \$5
 - or
- less than \$5

This is to avoid starting new residents off on the wrong foot by billing back for only a day or two of service. For anything over 3 days or \$5 we should charge back usage plus a \$5.00 daily fee. The \$5.00 daily fee should be charged if the utility bill is not put in resident's name at move-in. It should not be charged if resident changed the bill out of their name after giving notice or when the bill is a final bill.

18. Vacant thermostats should be set to 80 in summer and 55 in winter. Walk every vacant unit every 72 hours to check for burst pipes and squatters. For model, open/close daily to save on heating and AC costs. Make sure to send freeze warning notices to residents before the temperature drops or there is a huge winter storm.

19. Bonus Program – All bonuses for Star redemptions, extra leasing incentives, etc. will be paid via Amazon E-Gift card only and emailed to the email address on record for the employee. All gift cards Amazon E-Gift cards must be ordered through the FG Amazon Business Prime Account. VISA, store gift cards, are not permitted. All bonuses must be logged on the bonus spreadsheet.

20. You are required to check Month-To-Month leases every Tuesday to ensure that rents are at market rent and all other changes are at current rate.

21. When submitting payable batches that require any Deposit Accounting adjustments for past residents, please send the updated Move Out statement to the accountant with the Payable batch so they can review at the same time.

Bookkeeping Reminders/Policy

22. Accountants will send out original and revised SODAs, whether there is a refund or balance due. This means you need to make sure to inform your accountant when there is a change to a ledger after Deposit Accounting has been completed. Sites are still responsible for trying to collect outstanding balances.

23. Transfers within the same property will be given a 3-Day "grace period" in which double rent will not be charged. Resident may pick up keys to their new unit on Friday with the new unit lease beginning that day and return the keys to their old unit on Monday.

24. Charge back 30 days notice as one flat month of rent and 60 days of notice as two months of rent instead of calculating the notice fee based on the number of days left in this month + net month's prorate, etc. For example, if a resident gave notice on 2/15 and moved out on 2/20, they gave 5 days notice so you can divide their rent by 30 and multiply by 25 days to get the notice fee still due. No need to charge the 8 days left of Feb + 17 days of March to get the total.

25. Common area utility spreadsheets should be copied and pasted each month and then overwritten with the current month's info.

26. When emailing your accountant to update market rents at your site, please make sure to include a screenshot of the current market rent schedule in the email so everyone is on the same page with what the current rents are that need to be increased.

27. Carpet Vouchers - Upon renewal each home is given a carpet voucher – good for one free carpet cleaning within 60 days of receipt. The resident then contacts our carpet cleaning vendor directly to schedule the cleaning themselves. At the time the cleaning is done the resident should present the voucher to the vendor for payment or leave in plain site in the apartment for the vendor if they aren't home. The vendor should then take the voucher and staple it to the invoice as they submit it for payment. Once the invoice is received, the voucher is scanned and attached to the resident profile. Check 'No' on the chargeback stamp and note "Renewal" on the notes line.

12266		
CET YOUR CARRETS		NAME
CLEANED - ON US!		APARTMENT
	RECEIVED	EXPIRATION
THANK YOU FOR RENEWING!		AUTHORIZED BY
FIRST		SERVICED BY
PACIFIC GROUP, INC.	OFFER VALID FOR 60 DAYS AFTER By a first pacific r	RECIEPT. VOUCHER MUST BE COMPLETED EPRESENTATIVE AT THE TIME OF RENEWAL

Chart of Accounts

Chart of Accounts

Account	Account Name	Description			
6300	ADMINISTRATIVE		6500	MARKETING	
6302	ADMIN ADVERTISING	Employment ads	6505	ADVERTISING- INTERNET	Apt Guide, For Rent, Apts.com - paid by Marketing Dept
6303	ADMIN SUPPLIES		6506	ADVERTISING - OTHER	
6306	AUTO / VEHICLE / FUEL	Corporate vehicles; Fuel for Mule or company vehicle	6508	APARTMENT LOCATORS	
6308	BANK CHARGES		6511	MODEL APARTMENT	Accessories for model apartment
6310	CONSULTING SERVICE		6514	PRINTING / FORMS / MARKETING	Business cards, newsletters, brochures, stationery
6311	PAYMENT PROCESSING FEES		6516	RESIDENT / PUBLIC RELATIONS	refreshments, resident event supplies
6312	CREDIT / BACKGROUND CHECKS		6517	RESIDENT INCENTIVE	one-off resident or new move in gift cards, hotel rooms, etc
6316	EDUCATION / DUES	EPA cert, Pool cert, any classes, Sams membership	6518	SIGNAGE / MARKETING	balloons, flags, boot leg signs
6318	EMPLOYEE RELATIONS	Employee lunches, b-days, etc	6565	OTHER MARKETING	Move in gifts
6319	LATE FEES	Late fees we are charged by vendors			
6320	LEGAL SERVICES	Non- Eviction legal expenses	6600	UTILITIES	
6322	LEGAL - EVICTIONS		6602	CABLE TV	bulk cable TV for property
6324	LICENSES / MINOR TAXES / INSPECTIONS		6604	ELECTRIC - COMMON	Entered into excel spreadsheet
6325	OFFICE LEASE		6606	ELECTRIC - VACANTS	
6326	OFFICE EQUIPMENT LEASE	Copier lease	6608	GAS - COMMON	Entered into excel spreadsheet
6328	OFFICE EQUIPMENT	Phones, Computers, Desks; Install or Repairs	6610	GAS - VACANTS	
6331	COMPUTER SOFTWARE		6614	SEWER / STORM DRAINS	
6332	OFFICE SUPPLIES	paper, pens, toner, etc	6616	TELEPHONE - CELLULAR	
6333	YARDI SOFTWARE		6618	TELEPHONE - OFFICE	
6334	POSTAGE / FED-EX		6619	INTERNET	
6336	PRINTING / FORMS / ADMIN	Non marketing print items or forms	6620	TRASH	includes bulk pick up
6340	STORAGE RENTAL	Rent on storage container	6622	WATER	
6342	MILEAGE REIMB	employee mileage reimbursement- fill out mileage form	6665	OTHER UTILITY	
6343	TRAVEL / PARKING				
6365	OTHER ADMINISTRATIVE EXP				

MAINTENANCE EXPENSES 6900 CONTRACT SERVI 6700 IN-HOUSE GEN MAINT/SUPPLY 6900 CONTRACT SERVI 6702 APPLIANCE PARTS parts to repair appliances 6902 ALARM SERVICE 6709 PODE (INTERVAL foreignment of doors 6902 ALARM SERVICE	
6700 IN-HOUSE GEN MAINT/SUPPLY 6900 CONTRACT SERVI 6702 APPLIANCE PARTS parts to repair appliances 6902 ALARM SERVICE 6902 ALARM SERVICE 6902 ALARM SERVICE 6902 ALARM SERVICE	
6700 IN-HOUSE GEN MAINT/SUPPLY 6900 CONTRACT SERVI 6702 APPLIANCE PARTS parts to repair appliances 6902 ALARM SERVICE 6709 DODE (INTERIOR) (ENTRY) replacement of door 6704 ANDURING CONTRACT SERVI	
6702 APPLIANCE PARTS parts to repair appliances 6902 ALARM SERVICE	ICES
6709 DOODS (INTEDIOD / ENTRY) replacement of doors 6004 ANSWEDTHIC CEDU/C	
0/06 [DOORS (INTERIOR / ENTRY) replacement or doors 6904 ANSWERING SERVIC	CE
6710 ELECTRICAL (INTER. / EXTER.) light bulbs, elec supplies 6906 BOILER CONTRACTO	OR
6714 EQUIPMENT repairs, purchases or rental 6908 CARPET CLEANING	Standard carpet clean
6716 EXTERMINATING SUPPLIES big spray, mouse traps 6909 CARPET REPAIR	Work performed other than the carpet clean
6718 FIRE / SAFETY smoke detectors, annual fire inspection, supplies for safety 6910 COURTESY PATROL	
6720 HVAC / BOILER SUPPLIES Filters, thermostats, etc 6914 ELECTRICAL CONTR	RACTOR
6722 JANITORIAL SUPPLIES cleaning supplies 6918 EXTERMINATING SE	ERVICE Weekly service & BB treatments
6724 LANDSCAPING SUPPLIES rake, shovel, items that we plant ourselves 6920 HVAC CONTRACTOR	R Contractor to repair AC and heat
6726 LOCKS / KEYS locks, key blanks 6922 JANITORIAL SERVIC	CE Contract cleaning
6728 PAINT / DRYWALL paint, drywall, mud, tape, texture 6924 LANDSCAPING SERV	VICE Contract Landscape
6730 PLUMBING SUPPLIES toilets, ptraps, faucets, all supplies- NOT disposals 6926 PAINTING CONTRAC	CTOR Contract Paint
6732 UNIFORMS uniforms for office and maint 6928 PLUMBING CONTRA	ACTOR Contractor plumber
6734 POOL / REC SUPPLIES chlorine, shock, skimmers 6930 POOL SERVICE	Contract pool service
6736 WINDOWS / MIRRORS only if we are installing the window ourselves, mirrors 6932 ROOFING CONTRAC	CTOR Roof contractor- not SP
6738 HARDWARE misc category- screws, door stops, etc 6934 SNOW REMOVAL CO	ONTRACTOR Contract snow removal and sidewalks
6765 OTHER SUPPLIES UPGRADE supplies- plumbing, elec & hardware supplies 6936 WINDOWS CONTRA	ACTOR Contractor to install new windows
6767 COVID-19 EXPENSES 6965 OTHER CONTRACTO	ORS Vent clean, catch all for vendors not listed above
6800 EXTERIOR / CAM MAINTENANCE 7000 REHAB / REPLACE	EMENT
6802 CONCRETE REPAIRS trip repairs that are not SP 7002 APPLIANCES	Fridge, DW, stove replacements
6806 FENCING supplies to repair fence 7004 CABINETS / COUNT	ERTOPS
6808 GUTTERS / DOWN SPOUTS supplies to reapir gutters 7006 FLOORING	Carpet, Vinyl and Plank replacement
6812 PARKING / DRIVEWAYS 7010 DRAPES / BLINDS R	REHAB All blinds
6813 PAINT (EXTERIOR) curb paint, fence paint 7012 ELECTRICAL FIXTUR	RES
6814 ROOF REPAIRS supplies to repair roofs in-house 7014 HVAC REHAB	AC and furnace replacement, A-coils, Heat Pumps
6816 SIGNAGE / MAINTENANCE poles 7016 PLUMBING FIXTURE	ES Garbage disposals, tub surrounds, water heaters
6818 SNOW REMOVAL ice melt/salt (not contracted snow removal) 7019 ROOFING REHAB	
6822 STRUCTURE IMPROVEMENTS 7021 RESURFACING	Contract resurfacing or supplies for resurfacing
6824 OTHER EXTERIOR/CAM EXP.	
7400 UNIT UPGRADES	UP items are for Unit Upgrades ONLY
7402 UP APPLIANCES	
7404 UP FLOORING	
7406 UP INTERIOR PAINT	T- CONTRACTOR
7408 UP INTERIOR PAINT	T- SUPPLIES
7410 UP RESURFACING	
7412 UP CABINETS/COUN	NTERTOPS
7414 UP LABOR	
7416 UP SUPPLIES	
7418 UP ELECTRICAL- CO	DNTRACTOR
7420 UP PLUMBING- CON	VIRACTOR

- Commissions are due to your regional at the beginning of every month. Check your task calendar to find the official date. Your Regional will let you know if they are needed sooner for a particular month.
- Site manager should review all leasing and renewal files before submitting for commissions to be paid. The manger will review the following:
 - ✓ All information in Yardi is entered correctly: name, lease term, lease charges, roommates entered, emergency contact entered, renter's insurance, etc.
 - ✓ Check that lease copy, applications, etc. all correctly signed, completed, and saved in site server Move-in inspection sheet completed and saved with move-in photos
- Commissions will be paid the month after move-in & are paid with second paycheck. Commissions will then be paid with the second paycheck of every month.
- Emergency transfer no transfer fee paid- No commission
- Transfer when lease up- Pay renewal bonus
- Transfer mid lease with transfer fee and extended lease term- no commission paid.
- Manager discretion to void any commissions if all paperwork and procedures are not followed.
- No commissions paid to past employees if full 2 weeks' notice is not fulfilled.
- ½ commissions paid to past employees for their leases if full 2 weeks' notice is fulfilled.

*Commissions vary by site.

- Commission Logs are found in the Accounting folder on your site server in the location shown below.
- Maintenance Team members will be eligible for up to \$120 monthly bonus. The percent paid is based on the recapture percentage for the renewals.
- Maintenance Team members will also be eligible for \$100 on-call bonus when they're on-call during the weekend.

nputer	• D Drive (D:) • Data • SITE SERVER • SS SITE HR	Commissions - 2015 -	06-2015	- 🐼	Sear
en 🔻	Print New folder				
	Name ^	Date modified	Туре	Size	
	SS Closing Ratio 06-05-15	6/5/2015 1:14 PM	Microsoft Excel 97	14 KE	}
	SS Commissions Updated 06-10-15	7/9/2015 12:35 PM	Microsoft Excel 97	59 KE	3
	SS May Renewal Log 05-31-15	6/3/2015 12:14 PM	Microsoft Excel 97	246 KE	5

 Your commissions log will need to be filled out completely as shown in the example below, and all numbers checked for accuracy. Check with your Regional Manager for the structure for your particular site.

PROPERTY:	THE C	RCHARDS						
MONTH:	6/1/201	15-6/30/2015						
AGENT:	Lana	Katsafanas						
RESIDENT	APT#	MOVE IN DATE	APT TYPE	RENT AMOUNT	LEASE TERM	NEW	BONU	S
Jamie Bott	09223B	6/9/2015	2BR	\$699.00	12 months		\$ 60.0	00
Katherine Cherry	09463B	6/12/2015	1 BR	\$599.00	12 months		\$ 60.0	00
Christopher Canales	09681C	6/12/2015	1 BR	\$599.00	12 months		\$ 60.0	00
John Davies	09761D	6/12/2015	1 BR	\$609.00	6 months		\$ 40.	00
Rachel Alexander	09762B	6/16/2015	1 BR	\$609.00	12 months		\$ 60.	00
Khrystal Jackson	09282D	6/19/2015	1 BR	\$599.00	12 months		\$ 60.	00
Diamond Fountain	09803B	6/22/2015	1 BR	\$684.00	12 months		\$ 60.0	00
Haley Stratton	10023B	6/26/2015	2 BR	\$784.00	12 months		\$ 60.0	00
						Total	\$ 460.	00
Leasing Agent				Date:	7/7/2015	New @ 100%	\$ 460.	00
		Lana Katsafanas				Rnwl @ 80%	\$ 210.	00
Manager				Date:	7/7/2015	<u> </u>		
						TOTAL BONUS	\$ 670.	00

Commission Report Instructions

• In CRM Select Reports -> Custom -> Commission Report



- Choose the property
- Enter the dates for Move-in and Lease From for the month you are doing the commission for. Pull for **Current** status only.

			📰 View Report
Custom Commiss	sion Report		
Property*	Estates on Main ×	x	
Resident Name	select item 👻		
Status	Current ×	x	
Unit	select items	x	
UnitType	select items	x	
Move In	2/1/2020	2/29/2020	
Lease From	2/1/2020	то 2/29/2020	

• Click View Report (Top Right Corner)

Cus			nmiss	ion		port	.					
Commis	ssion Re	eport				and the second						
Property: Month: Agent:	em											
Unit Code	Unit Type	Sqft	Reident Name	Market Rent	Resident Rent	Concession	Lease From	Lease To	Lease Term	Commission	Agent	Attachments
5310B	em1b1	705.00	Keily Hernandez	755.00	740.00		2/7/2020	2/8/2021	12		Alexis Cozart	1310B Hernandez Dude Sheat off. 5310B Nove In Photos pdf. Attachment_0272460_O-2152012021.pdf Attachment_0272460_O-2152012021.pdf Attachment_0272460_O-RetalQualitaciations_Oct262019080550_JHG. Attachment_0272460_O-IntalQualitaciations_Oct262019080550_JHG. Attachment_0272460_Upidad_15HerBickture_Oct282019080550_JHG. Attachment_027272450_Upidad_15HerBickture_Oct282019080550_JHG. Attachment_0272722
5355L	em1a1	694.00	Leilani Douds	740.00	725.00		2/12/2020	5/17/2021	15		Whitney Briggs	5356. Move in Pics pdf. 5356. Duce Sheet pdf. Attachment_02075869. Feb10202123316.pdf. Attachment_02073869. RetraiQualitications_Wor252019023339.pdf, Attachment_02073869. RetraiQualitications_Wor25201902312.pdf, Attachment_02073869. Upicad_ProtureID_Wor25201913658.peg, Attachment_02073869. Upicad_Protofficmome1_Nov252019105152.pdg, Attachment_0207377_Lease_Feb12020090835_Archive.pdf. Attachment_0077377_Lease_Feb12020091853_Archive.pdf. Attachment_0077377_Lease_Feb12020001853_Archive.pdf. Attachment_0077377_Lease_Feb12020001853_Archive.pdf. Attachment_0077377_Lease_Feb12020001853_Archive.pdf. Attachment_0077377_Lease_Feb12020001853_Archive.pdf. Attachment_0077377_Lease_Feb12020001853_Archive.pdf. Attachment_007737_Lease_Feb12020001853_Archive.pdf. Attachment_007737_Lease_Feb12020001853_Archive.pdf. Attachment_007377_Lease_Feb12020001853_Archive.pdf. Attachment_007377_Lease_Feb12020001853_Archive.pdf. Attachment_007377_Lease_Feb12020001853_Archive.pdf. Attachment_007377_Lease_Feb12020001853_Archive.pdf. Attachment_007377_Lease_Feb12020001853_Archive.pdf. Attachment_007377_Lease_Feb12020001853_Archive.pdf. Attachment_007377_Lease_Feb12020001853_Archive.pdf. Attachment_007377_Lease_Feb12020001853_Archive.pdf. Attachment_007377_Lease_Feb12020001853_Archive.pdf. Attachment_007377_Lease_Feb12020001853_Archive.pdf. Attachment_007377_Lease_Feb12020001853_Archive.pdf. Attachment_007377_Lease_Feb12020001853_Archive.pdf. Attachment_007377_Lease_Feb12020001853_Archive.pdf. Attachment_007377_Lease_Feb12020001853_Archive.pdf. Attachment_007377_Lease_Feb1202001854554_Pd12005354.Feb3200545545_Pd120054554

• Once it's in Excel format review each unit and make sure the following are included in the attachments: Lease, ID's and move-in photos. Please make sure that all attachments should be named for easy review.

Commis	sion Re	eport										
Property: Month: Agent:	em											
Unit Code	Unit Type	Sqft	Reident Name	Market Rent	Resident Rent	Concession	Lease	Lease To	Lease	Commission	Agent	Attachments
53008	em1b1	705.00	Antonia Walker	705	705		12/14/2019	3/15/2021	15		Whitney Briggs	S008 Move in Finatos pdf, 53008 Quote Sheet.pdf, Attachment_p0274241_Sep27201 9114712.pdf, Attachment_p0274241_RentalQuali fications_Audit_Sep282019120920. pdf, Attachment_p0274241_RentalQuali fications_Sep28201901605 pdf, Attachment_p0274241_Upload_Pro ofofincome1_sep282019091609 jpe9, Attachment_p0274241_Upload_Pro ofofincome2_Sep282019092353.pn g, Attachment_p0274241_Upload_Pro ofofincome2_Sep282019092353.pn g, Attachment_0077072_Deco5201 9112407 pdf, Attachment_10077072_Lease_Dec 052019104951_Archive.pdf, Attachment_10077072_Lease_Dec 052019104951_Archive.pdf, Attachment_10077072_Lease_Dec 052019104551_Archive.sdf, Attachment_10077072_Lease_Dec 05201910575.pdf, Walker 53008 Reasonable Letter from Doctor 10-02-19.pdf, Walker 53008 Pet Photo 1-19.

Once all are reviewed and accurate delete column N (Attachments) Highlight column and click delete in top tool bar and choose delete column.



• Enter the amount of each commission.

Unit Code	Unit Type	Sqft	Reident Name	Market	Resident	Concession	Lease	Lease To	Lease	Commission	Agent
				Rent	Rent		From		Term		
5300B	em1b1	705.00	Antonia Walker	705	705		12/14/2019	3/15/2021	15		Whitney Briggs
5340C	em2a1.5	1282.00	Deanna Helton	895	895		12/21/2019	3/22/2021	15		Whitney Briggs
1100C	em2c1.5	1649.00	AuJanay Knight	945	945		12/6/2019	3/8/2021	15		Whitney Briggs
5345B	em1a1	694.00	Telisa Davis	695	695		12/21/2019	12/21/2020	12		Amanda Buccilla
1075J	em2c1.5	1649.00	Gerald Lipsey	985	985		12/12/2019	12/14/2020	12		Amanda Buccilla
1075G	em2c1.5	1649.00	Michael Scott	1070	1070		12/6/2019	12/7/2020	12		Amanda Buccilla
5290G	em2b1.5	1395.00	Hunner Ramsey	925	925		12/27/2019	12/28/2020	12		Amanda Buccilla
5311G	em1d1	975.00	Xiaoying Liu	785	785		12/31/2019	6/29/2020	6		Amanda Buccilla

• Once all are entered sort by Agent



Click on Custom Sort – Choose Column M (Agent)

в	С	D	E	F	G	Н	1	J	к	L	M	N	0		P	Q	R	S		т	U	\	/
Commis	sion Re	port																					
Property: 6 Month: Agent:	em																						
Jnit Code I	Init Type	Sqft	Reident Name	Market	Resident	Concession I	ease	Lease To	Lease	Commission	Agent												
				Rent	Rent		rom		Term		-												
300B e	em1b1	705.00	Antonia Walker	705	705	1	12/14/2019	3/15/2021	15	60	Whitney Briggs												
5340C (m2a1.5	1282.00	Deanna Helton	895	895	1	12/21/2019	3/22/2021	15	60	Whitney Briggs												
100C e	m2c1.5	1649.00	AuJanay Knight	945	945	1	12/6/2019	3/8/2021	15	60	Whitney Briggs												
6345B (em1a1	694.00	Telisa Davis	695	695	1	12/21/2019	12/21/2020	12	40	Amanda Buccila												
1075J e	m2c1.5	1649.00	Gerald Lipsey	985	985	1	12/12/2019	12/14/2020	12	40	Amanda Buccilla												
1075G e	m2c1.5	1649.00	Michael Scott	1070	1070	1	12/6/2019	12/7/2020	12	40	Amanda Buccila	(Sect.											2 53
290G e	m2b1.5	1395.00	Hunner Ramsey	925	925	1	12/27/2019	12/28/2020	12	40	Amanda Buccilla	Sort									_		
i311G e	:m1d1 !	975.00	Xiaoying Liu	785	785	1	12/31/2019	6/29/2020	6	20	Amanda Buccilla	+ <u>A</u> d	d Level	XDe	elete Level		opy Level		Optio	ns	- N	ly data h	as <u>h</u> eaders
										Total		Column Sort by	n I Calver			Sort C	On			Order			
													Colum	n M		Cenv	aiues			A to 2			
		Leasing Agent							New @														
		Manager							Rnwl @														
						-																	
IND LATO	MISSION																						
2.7.2.00																					ОК		Cancel

You have to highlight the worksheet only to sort by Custom

roperty:	em										
Month: Agent:											
Init Code	Unit Type	Sqft	Reident Name	Market	Resident	Concession	Lease	Lease To	Lease	Commission	Agent
3008	emilti	705.00	Antonia Walker	Rent	Rent		12/14/2010	3/15/2021	16rm	60	Wheney
	entret	100.00	Postoria Tranci	105	105		1271412019	GRIDIEUE1	12	00	Brings
340C	em2a1.5	1282.00	Deanna Helton	895	895		12/21/2019	3/22/2021	15	60	Whitney Briggs
100C	em2c1.5	1649.00	AuJanay Knight	945	945		12/6/2019	3/8/2021	15	60	Whitney Briggs
3458	em1a1	694.00	Telisa Davis	695	695		12/21/2019	12/21/2020	12	60	Amanda Buccila
075J	em2c1.5	1649.00	Sherlonda Francis	985	985		12/12/2019	12/14/2020	12	60	Amanda Buccila
075J	em2c1.5	1649.00	Gerald Lipsey	985	985		12/12/2019	12/14/2020	12	60	Amanda Buccila
VAIT1A1	em1a1	694.00	Leilani Douds	660	660		12/31/2019	12/30/2020	12	60	Whitney Briggs
075G	em2c1.5	1649.00	Michael Scott	1070	1070		12/6/2019	12/7/2020	12	60	Amanda Buccila
290G	em2b1.5	1395.00	Hunner Ramsey	925	925		12/27/2019	12/28/2020	12	60	Amanda Buccila
3116	emidi	975.00	Xiaoying Liu	785	785		12/31/2019	6/29/2020	6	30	Amanda
-							_			Total	- Duccha
										0.0776	
		Leasing Agent							New @		
		Manager				-			Rowl @		

- Log into Commission Spreadsheet in the server.
- Copy and paste the info per agent into the worksheet on the server only need to copy Unit Code Commission (Columns B-K)

PROPERTY: MONTH: AGENT:	Estates or Decem Whitney F	n Main ber Briggs	Leasing Goal 12 Net Leases 8 70% of New Leases per Jan	ne 0.666666	667					
UNIT #	UNIT TYPE	SqFt.	RESIDENT	MARKET	RENT	RESIDENT RE	NT LEASE FROM	LEASE TO	LEASE TERM	COMMISSION
5300B	em1b1 em2a1.5	1282	Deanna Helton	\$705.0	0	\$705.00 \$895.00	12/14/19	03/15/21	15	\$60.00
1100C	em2c1.5	1649	AuJanay Knight			\$945.00	12/06/19	03/08/21		\$60.00
									Total	\$180.00
K Leasing Agent	Whitney Briggs			Date:		1/5/2019			New @ 70%	\$126.00
Manager (Ciara Banks			Date:		1/5/2019			TOTAL COMMISSION	\$126.00
5345B	em1a1	694.00	Telisa Davis	695	695		12/21/2019	12/21/2020	12	40
1075J	em2c1.5	1649.00	Gerald Lipsey	985	985		12/12/2019	12/14/2020	12	40
1075G	em2c1.5	1649.00	Michael Scott	1070	107	0	12/6/2019	12/7/2020	12	40
5290G	em2b1.5	1395.00	Hunner Ramsey	925	925		12/27/2019	12/28/2020	12	40
5311G	em1d1	975.00	Xiaoying Liu	785	785		12/31/2019	6/29/2020	6	20
PROPERTY: MONTH: AGENT:	Estates or Decembe Amanda B	n Main r 2019 uccilla	Leasing Goal 12 Net Leases 8 70% of New Leases per Jai	ne						
LINIT #		SaE+	DECIDENT	MADVET	DENT					COMMISSION
5345B 1075J 1075G 5290G 5311G	em1a1 em2c1.5 em2c1.5 em2b1.5 em1d1	694 1649 1649 1395 975	Telisa Davis Gerald Lipsey Michael Scott Hunner Ramsey Xiaoying Liu	695 \$985.(\$1,070 \$925.(\$785.(00	695 \$985.00 \$1,070.00 \$925.00 \$785.00	12/21/2019 12/21/2019 12/12/19 12/06/19 12/27/19 12/31/19	12/21/2020 12/14/20 12/14/20 12/07/20 12/28/20 06/29/20	12 12 12 12 12 12 6	\$40.00 \$40.00 \$40.00 \$40.00 \$20.00
						<u> </u>	<u> </u>			
						<u> </u>				
				_					Total	\$140.00
Leasing Agent	Amanda Buccilla			Date	:	1/5/2020			New @ 70%	\$98.00
Manager <u>C</u>	Ciara Banks			Date	:	1/5/2020			TOTAL COMMISSIO	N \$98.00

Complete the top portion and calculations are at the bottom as normal.

The following checklist should be fully completed and uploaded to CRM to receive each commission.

	Applicant Name(s)
	Phone Number
FIRST PACIFIC	Unit
FIRST PACIFIC GROUP, INC.	MI Date
Application Checklist	Lease Term
Application Process	Make Ready
Application complete and signed	Inspect unit & take move in photos
Application fees paid	Move-In Photos in CRM
Applied under a special Y / N	Ensure keys are made and in key box
	Apartment Keys
Info entered in CRM	Mailbox Keys
Scan Photo ID	Pool Key
Run and grade rental report(<u>s)</u>	Laundry Key
Additional documents required Y / N	Prepare move in packet and gift bag
	Follow up prior to move in
Pay subs received	Expected arrival time:
3 x rent \$	
Income \$	
Guarantor	Move In Process
4X rent \$	Electric account number #
Income \$	Water/Sewer account #
Update CRM	Gas account number #
Submit to Ruanne for review	Enter License Plate #
Approved	Email lease 3 days out & info sheet
Approved w/additional deposit	Countersign lease 2 days out
Denied/Canceled	All paperwork signed and in CRM
Notify Applicant(s)	Move in balance paid <u>NOT ACH</u> \$
If Approved: Earnest Money Paid	Review move-in packet with resident(s)
	MI Checklist
Application & Lease Charges	Like Ux on FB Resident Portal
Aurilian Proc. 4	Release keys and move-in sift
Application rees \$	All docs have been uploaded & saved
Admin Fee S	Manager post MI in Yardi
Rent S	Verify ledger at Zero balance
Pet Rent \$	Follow up 48hrs after move-in
Utility \$	
Short Term \$	
Security Deposit \$	
Additional Deposit \$	Notes:
Pet Deposit \$	
Pet Fee \$	
Carport \$ & #	
sens agent	
nager Approval:	

Corrective Action

• When completing an Employee Corrective Action this form must be filled out by you and signed by yourself, the employee you are writing up and a witness.

Best Practices:

- Make sure you have email documentation to back up your responses
- Make notes of dates and times where you have previously spoken to the employee about the subject
- Refer back to the Employee Handbook with a certain policy that was missed and resulted in this corrective action
- Reiterate the policy that must be enforced and some tangible goals to reach in the Performance Improvement Plan
- Finish off Performance Improvement Plan with "Any violation of company policy or instruction can result in further corrective actions up to and including termination."

	EMPLOYEE CORRECTIVE ACTION
Employee's Name:	Date:
The following Division E	
	Separation was issued today and it is to be made part of the official record.
Manager Name:	Department:
	REASON FOR WRITTEN WARNING
This is a disciplinary action for Company's personnel file for	or the reason(s) given below. It will become a permanent part of the you.
	PERFORMANCE IMPROVEMENT PLAN
I HAVE READ THIS REPORT A	ND ACKNOWLEDGE THAT THE CONTENTS WERE DISCUSSED WITH ME.
Employee Signature	Witnessed By
Manager Signature	Witnessed By
HUMAN RESOURCES:	DATE:

Daily Task List

- Every morning you will send out a daily tasks email. This email will consist of tasks that need to be completed for the day and reminders and announcements such as: scheduled appointments and tours, inspections, move-ins, move-outs, etc.
- The daily task email will summarize the CRM calendar, property calendar and daily task calendar for each day.
- You should list out specific tasks assigned to each team member and are required to include a quote or meme to motivate your team.



Employee Files

- All information regarding current and past employees is confidential and should be kept secure at all times.
- Save all employee related information and forms (ex: new hire paperwork, PTO requests, reviews) in your secure HR server folder and to the employee's file in Prism
- Move past employees to the past employee file as employees are termed. Follow up with your regional if you don't have access to this.



Then select Load a document

ŀ	IR / Change / Employee Documents		Company: (8164) First Pacific Group, Inc		1	2	
r s	Employee Documents						
	Document Name	Notes		Date Attached	ESS		
	No Documents Loaded						
2							
ie -							
n							
4							
ld							
4							
ie –							
ie -	Load a Document						
	Close						

Employee Review: 90 Day

- 90 Day reviews are mandatory and must be part of every employee file.
- It is the manager's responsibility to put a reminder on their calendar the day the new employee starts so it's not forgotten.
- Enter all info in the top as you would for an annual review.
- Be conversational and get feedback on how the team member is feeling and find ways we can help them succeed in their positon.
- The 90-day review is designed to ensure the team member is meetings the job requirements and if not, provides a formal setting to address their performance issues.
- It also provides a forum for the employee to ask any questions they may have or voice any concerns.

90 Day Review FIRST PACIFIC	CIFIC GROUP, INC.		90 Day Review FIRST PACIFIC Prist Pacific Group, INC.
			program could de improved?
EMPLOYEE NAME POSITION/TITLE	LOCATION REVIEW DATE		Do you believe you have a good Team in place and are you happy coming to work each day?
			Other - Discuss any changes in the work place or position / confirm you feel comfortable in office / PTO / Planned Vacation / Annual Review date.
-			
GENERAL QUESTIONS AND DISSCUSSION POINTS Why do you think we selected you for this position?	COMMENTS	-	
			Remain in current position Transfer to spotter position
What do you like about the job and First Pacific Group?	-		Promotion to higher level responsibility (specify desired position)
			Other objectives (explain)
What's been going well? What are the highlights of your experiences so far? Why?	-	-	Other Companys
Do you have enough, too much or too little time to do your work?		-	
			SUPERVISOR OR REVIEWER'S SIGNATURE
What do you need to learn to improve? What can we do to help you be more successful at your job?			
Tell me what you don't understand about the job or First	-		
feel you can accomplish?			
Which co-workers have been helpful since you arrived?	-	-	
Who do you talk to when you have questions about work? Do you feel comfortable asking?	-	-	
Have you or do you currently have any issues that have not been resolved?	=		
What goals do you have for the next 90 days?	-		
As of today do you feel fully trained to perform all your required job duties? What aspect of the training			

Employee Review: Annual

- Employee reviews are due annually within a week of an employee's work anniversary.
- Complete reviews at least 2 weeks in advance to have your area/regional look over them.
 - Please be sure to fill out the top section of page 1 and then all highlighted areas.
 - Remember to give tangible goals for the team member to reach, for example, Increasing revenue by 6% by next review, 1 positive google review a month, taking 1 leadership course a month.
- Once your area/regional returns the reviews to you, schedule a time with the employee to go over their review.
- Please use the specific 90-day review form for the team member's 90-day review.

Performance Review – C	ustomer Too	olkit	FIRST PACIFIC	Р	Performance Review – Customer Toolkit
EMPLOYEE NAME	POSITION/TITLE		COMPANY	Two states and states	Vhat is the employee's longer-termobjective for employment
· · · · · · · · · · · · · · · · · · ·			FPG	w	ith the company/organization?
START DATE	DEPARTMENT -		LOCATION	Sa	alary Package / PTO available / Planned Vacation
REVIEWINGMANAGER/SUPERVISOR	LAST REVIEW DATE		CURRENT REVIEW DATE	En En Gr Po	nter in nours furuer - netwalabileases reac Hill Traininga - how are they doing Idential for quartery NOI Ebnua- amount
Performance Rating				\$_ Ur	paid towards benefits N/A
Fails to meet Needs Standards Improve	to e to meet 3 ards	ully meets Standards	4 Exceeds 5 Farexceeds Standards		U noursas or
GENERAL PERFORMANCE FAC	CTORS	RATING	COMMENTS	_	
General Overview taking in to account i Quality – Degree to which finished assign accurately, completely and in accordance Quantity – Amount of work produced by er compared with the expected standard forti Dependability – Employee's reliability in ci assignments within established deadlines Also, employee's consistency in attendan other general work rules. Initiative – Extent to which employee sees done and does without being toid. Include employees, departments, and customers. Organizational & Team Relationships – Ef customer and supervisor, relationships. I and sincerity in dealing with others, willing guidance from supervisor, etc	the following: iments are done with guidelines. mployee as this position. ompleting and schedules. ce and meeting s what needs to be as helping other fectiveness of peer, ncludes courtesy pness to follow	3	Type general into and over-view Quality-notes Quanity-notes Dependability-notes Initiative-notes Team Relationships-notes		Remain in current position Transfer to another position Promotion to higher level responsibility (specify desired position) Other objectives (explain) Other objectives (explain) Promotion to higher level responsibility (specify desired position) Transfer to another position Promotion to higher level responsibility (specify desired position) Other objectives (explain) Promotion to higher level responsibility (specify desired position) Promotion to
(combine with employee self evaluatio	n)	-	aype onmer bonner notes nere	T) St	ype overall notes here UPERVISOR OR REVIEWER'S SIGNATURE DATE
Area's for improvement:			Type notes here		
What can the employee do (within perforr position) that would enhance his or her co companylorganization? (Area's that the e to pay attention to / factors upon which en next period)	mance of current intribution to the imployee may need nployee will be rated	N/A		E)	MPLOYEE'S SIGNATURE** DATE Acknowledges receipt only. Comments can be provided on this form or on a separate sheet if desired.
Goals for 2015: (combine with employee self evaluation	n)	N/A	List goals here with numbers- try to list at least 10		
Employee Feedback: (combine with employee self evaluation	n)	N/A	Thank you for your self-evaluation, we have incorporated these goals into your review.		

Evictions

- Evictions should be filed with your attorney per the collections policy in your lease. (Generally, the 20th of the month)
- After filing a second eviction on a resident, we send a 30-day notice for them to vacate, except in CA.
 - The section shown below should be included in your lease to outline this policy.

Timely Payments. Owner insists upon payment of the rental installment on the due date, and the acceptance of late rental payments along with compensation as allowed by law for costs of processing late payments shall not be construed as a course of dealing or waiver of any rights that the Owner may have by virtue of the payment of rent installment after the due date. Resident is advised that if Resident shall fail to make rent payments on or before the due date two (2) times in any twelve (12) month period, it shall be construed as a material breach of this lease agreement.

Follow the below Delinquency Guide to collect delinquency and prevent evictions

- Cover the lease at the time of move-in and clearly outline the payment process and importance of paying on time is vital to training the residents to make their rent payment their #1 priority.
- It is important that you make constant contact with the residents when they are late on rent. Here is the basics for contact (always go above and beyond this).
- Follow the Monthly Task Calendar for specific deadlines as they do fluctuate every month
- Serve your notice of Non-payment timely. If rent is late on the 4th the Non-payment notice needs to be served on the 4th unless it is a Sunday. Anyone that owes over \$100 should be served a notice of nonpayment.
- Always require payment in full to avoid chasing small balances.
 - If there is a balance under \$100 send balance reminder on the 7th.
 - Send again every 4 days until paid
- Make contact with all delinquent residents on the 7th. Get them to commit to paying no later than the 15th. Remind them every day their balance is increasing (for sites with daily late fees).
 - If not contact by the 12th serve a 24-hour notice of entry to check for occupancy.
- You will make contact ever other day with delinquent residents until you have a firm date of payment. Use all sources: call, text, email and knock-on doors.
- Update your delinquency report daily. Submit to your regional no less than twice a week (Monday & Thursday).
- 24 hours before promise to pay, contact the resident to remind them to pay and give the total that will be due and then again, the morning of.

Evictions

- The day before filing evictions you must knock on doors for anyone that has not paid and try to collect ASAP. Remind them of costs to file and the eviction process. Serve NASTY GRAM – has notice of entry stated on the form. If no answer – check for occupancy.
- Evictions are to be filed no later than the 20th of the month bust must be filed on the date indicated on the monthly task calendar. There are no exceptions to this rule. Only Sarah Young or Jane Gray can give an extension on filing evictions. Once filed, place them on evictions and charge the legal fees. Once they are put on eviction they will be locked from the portal so they must contact you to make payment. Instructions for placing on eviction are below.
- After filing you will reach out every 3 days prior to court to try and collect full payment. If no
 communication, you will need to serve notice and check for occupancy every 3 days until contact is
 made. If not paid by court, serve 24 hour notice to check for occupancy the day after court ad then
 serve every 3 days until they are out or put out by the bailiff.

			AR	Delinquency F	Report 09/201	9	
Unit	Code	Name	Owed	Office Phone	Home Phone	Notes	
38501N	t0076396	Wahl, Ashley	\$820.00		(616)655-3137	GT 9/9 Paying 9/13	
38521F	t0047104	Daniels, Maurice	\$735.50	(616)389-9441		GT 9/9; Paying on 9/12	
38602J	t0240220	Moore, Devon	\$877.50	(313)585-0045		GT 9/9; EM 9/10; Sent 24 HR notice 9/1	1
38602N	t0049887	Pollice, Craig	\$972.00		(616)272-9844	GT 9/9; EM 9/10; Sent 24 HR notice 9/1	1
						Attended court, working on paying to sta	y and will let me
386218	t0243843	Baculy, Jonathan	\$1,920.70	(616)600-3569		know Friday!	
38721M	t0065984	Ulmer, Naquan	\$848.90	(313)694-7560		GT 9/9; EM 9/10; Sent 24 HR notice 9/1	1
3880 1N	t0232107	Leatherman, Sheryl	\$1,107.50		(616)498-9217	GT 9/9; EM 9/10; Sent 24 HR notice 9/1	1
38802N	t0075445	Mccoy, Daejahnae	\$1,062.00	(616)309-6743		GT 9/9 Paying by the 18th	
3890 1B	t0238931	Geiger, Kelcey	\$899.50		(616)916-9027	Paying by 9/16	
38902G	38902G t0075497 Carter, Keimon \$888.50 (616)516-3281 GT 9/9; EM 9/10; Sent 24 HR notice 9/11				1		
38922H	t0075250	Enge, Quintin	\$877.50	(616)292-9952	9952 Paying on 9/13		
39001H	t0076036	Hernandez, Felipe	\$1,193.50	(616)589-7515	7515 (616)589-7515 Paying on 9/19		
39122D	t0075341	Lewis, Alexander	\$855.50	(616)264-4971		GT 9/9; Paying on 9/11	
39202A	t0062032	Gutzki, Jennifer	\$89.40			on Notice, incorrect amount on resident	services
39221J	t0060266	Francis, Levi	\$1,082.00	(616)448-8424	(616)448-8424	GT 9/9; Paying 9/13	
39222G	t0076588	Jarosz (emp), Kenneth	366.00		(616)498-5059		
39302A	t0075043	Peltier, Kevin	\$1,010.50	(616)265-6612	(616)634-4669	GT 9/9; EM 9/10; Sent 24 HR notice 9/1	1
39402N	t0065279	Swartz, Andrew	\$1,066.00			NSF Payment 9/11 sent 7 day, NSF forr	n, and emailed
39601C	t0069154	Mackie, Laura	\$953.00	(616)916-5753	(616)916-4149	GT 9/9 Paying on 13th	
On Notice		Eviction			Employee N		

Example Delinquency Report

Eviction Process

- Once the file is sent to the attorney the Manager / Assistant Manager will enter the eviction into CRM and charge the attorney's fees/. You will enter the eviction date as 12/31/99 as this will put the unit on notice and we don't want it to get leased as many pay to stay.
- If they pay you will then take them off eviction.

Evictions

• This will take some monitoring so please make sure you look at the move-out date before offering a unit to lease.

To Place on Eviction in Yardi:

• From the resident screen choose Actions and then click Evict

es on Main			Eack to Search	🕇 Add 📑 Docum	nents	Activity 📑 Actions	≓ Jump T
es on Main Jazmien Watkins Jazmien Watkins Resident Resid	Lease	CUTTENT Preview Resident Services Move In: 12/14/2018 Lesse Explores: 12/15/2019 Rent: 5955/00/mo Balance: 1.275 30 Late/NSF Count: 5 / 0	Back to Search	Add Add Apartment # 532 Unit Type em2n1-5 Borbiller 261: 516 article 16 States on Main State Son State State Son State S	5D 5D solve Follow	Activity Actions Transfer Unit Reverse Move In Renew Lease Assign Unit Adjust Lease End Notice Evice Month to Month Screening Promote Roommate Asnage Online Account	roposals
First Name	Jazmien	Offic	e (614) 816-3547	۵			
Middle Name	LaShai	Hom	e (614) 377-7925	۵			
				-			
Last Name	Watkins	Mobil	e (614) 900-5405	u			

Enter the move-out date of 12/31/2099. Click Save. DO NOT post the term fee as this will only be charged
if they move out.



• If they pay you can Cancel Evict under Actions

tates on Main		🕂 Add 📄 Documents 🔝 Activity 🔜 Actions 💳 J
Jazmien Watkins		Cancel Evict Adjust Move Out Dates
Resident to: 0246972 Prospect: 02046972 final; jumenwatking/pumat.com Mobile: (03) 4000-5409 Home: (014) 377-7325 Preferred Contact Methodolione	Eviction CP Preview Restert Services More Gut: 12/1/2009 Fort: 57/7019 Marci: 53/57/7019 Marci: 53/57/70	Apartment # 53250 Unit Type erran 3 Beslik 2 Ed. 13 Ea TH alcony & partial basem 1282.00 optic Estates on Main 3312 datebouse Brive Columbus, 0H 43213

• If they NO NOT pay then you will go under actions to adjust the move out date once we know we will get possession of the unit.

Using the provided website login with your new username and password:

Enter "First Pacific Group" in the entity name and your unique login name and password, then click sign in. Your login name should be your first initial and last name.

Login					
Entity Name					
First Pacific Group)				
Login Name					
ewagner)				
Password					
	Forgot Password				
Sign In Change Password					
Vindows System Validation Mac System Validation					

You may get an error message. Click the hyperlink "Click

here to reload this page" to get to the website.

Sorry, an error occurred while processing your request. Please contact your system administrator. <u>Click here to reload this page</u>

There is a Training module in the Toolbar for you to test out the checkscanning process to familiarize yourself with the steps:

	Home	Capture – Transmit – Analytics	 Training - 	Admin 🗸
	Forme Capture - Transmit Analytics	- Training - Admin -		
	Create / Edit Deposit	Welcome		Create, correct, and edit deposit transactions Merchant Deposit
		Messages		
T		July 19. 2020 • **** Remote Deposit Update 4.1.1 Chrome Version / Mac OS Mojave and Catalina****		Transmit
deposit		End-users using the new Remote Deposit Application on Google Chrome v84 are unable to elt capture items. The workaround for this issue is to access the application using Internet Explo majority of impacted users are using Windows 7. Deposit 24/7 version 4.1.1 is no longer cert operating system as it is no longer supported by Microsoft. End-users still using Windows 7 s	her login or rer 11.The ified with this hould	Transmit transactions and review transaction status <u>Status</u> <u>Deposit Limits</u>
go to Capture → Create/Edit		upprade to Windows 10 at their earliest convenience for continued support. Mac OS classius 10.15 10.146 users was unables utilitie Depart 27/ 41.11 Akt time was rongly suggest that Departicly? 41.11 Mac upgrade their systems to classius 10.15.66r Majave 10.14.6. No Work around has been identified at this time. Our currently reserving this issue to locate a solution. Monday - Friday1-800-221-9777 opt 16:00am pacific to 5:30pm pacific	6 and Mojave sers <u>Do Not</u> velopment is	Analytics Review, generate, and locate data history
Deposit or click the Merchant Deposit link:		Tarouary 9, 2019 Welcome to the First Republic Bank Remote Deposit Service! First Republic Bank is committed to emuring that your Remote Deposit experience is as easy as it is convenient. We a fifty you these educated features: You may access extensive reporting options with a library of standard reports and summaries: Support for more you're deposits and deposit items with havey watermarks; Auto-endorsement for ches manually endorse ach check separatry?: East yoe expert date to other applications such as Excel and Quickbochs: 7 trup processes and video tuttorial) available directly within the product! You should need austimace, please contact? Bank Corpored Service 1.300-221-29777, Option #I Hours of Operation: Monday through Finday; 6:00 A Time until 5:30 PM Pacific Time	re pleased to satch (c (co need to mining (step-by. mr Republic M Pacific	Reports Exports Research Training Learn how to get the most out of your application Visit Training Site

Select the date, Location, Account to deposit the checks to, input **total** Deposit amount and click on Create New Deposit:

Create or Edit Merchant Deposit								
New Deposit								
Date	08/11/2020	#						
Location	FIRST PACIFIC GROUP	-						
Account	San Lorenzo Court As (80000184391)	•						
Deposit Amount	7,681.84							
	Create New Deposit							

This will generate a Deposit Ticket which contains the inputted/selected information. Place checks in scanner (light should turn from green to orange on scanner). Click on Scan.

	Location: FIRST PACIFIC GROUP San Lorenzo Court As (80000184391)	
Deposit 7,681.84 - Checks 0.00 = 7,681.84	Scan Scanner 🕏 Free Track Rescan Delete Item Item Details	Close
Item List		Routing Transit
Document Type Amount		510016690
1 Deposit Ticket 7,681.84		Account
		80000184391
	Amount: \$7,681.84	Serial
	Account #: 80000184391	319
	Account Desc: San Lorenzo Court As	Amount
	Credit Date: 20200811 Deposit	7,681.84
	User: ewagner IICKEL	Deposit Name
	Location: FIRST PACIFIC GROUP	

Checks must be divided by property and can only be scanned and deposited to one property at a time. Check that the light on the scanner is green:

Insert the checks into the scanner facing outwards:

Check that the light on the scanner turns orange once the checks are inserted:







If there are any issues there will be highlighted lines in Yellow to click and correct.

To navigate:

	Step	Action
to	1	Press the Enter key on the keyboard for each item viewed.
ιe.	2	Use "Flip" to view the back image and to return to the front image.
	3	Use the tool bar at the top right to adjust the view of the image.
	4	Continue to press the Enter key on the keyboard until all items are
		reviewed.

Make the necessary adjustments to the transaction as needed.

CORRECTING DEPOSIT AMOUNTS

Enter the correct value for the highlighted fields using the image displayed. Include the cents value; the decimal point is not needed. The system automatically marks the last two values as cents.

	Ready	1	AuxOnUs	Transit/Routing	Account	Process Control	Amount Cu
	V	1		10202-004	5007234		5000.00 12
•	V	2	001	00082-260	1234567890		150.00
	V	3	000075	10202-004	0690-5219098		25.75

DELETING ITEMS

Items may need to be deleted from the transaction. This could include items with incomplete information. Follow these steps to delete items:

Step	Action
1	Highlight appropriate item.
2	Click Delete.
3	Click Yes to confirm deletion.

DELETING DUPLICATES

To delete a duplicate follow the steps above.

If "Possible Duplicate Item Review" is shown, compare the two images or item details to determine if the item is a duplicate.

lf	Then	Result
If the item is not a	Click No .	The item remains in the
duplicate,		transaction, but will be
		flagged for central
		processing to review further.
If the item is a	Click Yes. Then click Yes	The image data is
duplicate,	to confirm deletion.	permanently removed from
		the transaction. This effects
		the transaction balance,
		which may require a final
		review of each item.

Physically remove the item from the scanner.

IMAGE QUALITY AND USABILITY

If an item fails an Image Quality test, a message displays in the capture screen indicating the failed test. The options available for modifying the image depend on site configurations and type of error.

The captured images display in a preview window with list of detected errors.

Step	Action
1	Review the message for recommended action.
2	To rescan the image place the physical item back in the scanner.
3	Click Rescan .
	NOTE: Once the rescanned image displays and quality errors are updated, the brightness may also be adjusted with the image brightness slides. This can only be done after an item is rescanned.
4	Click Apply to update the error messages and recaptured images.
5	Click OK to return to the capture screen.

In some cases, rescanning the item is not an option and it must be removed from the transaction.

Step	Action							
1	With the item selected, click Delete .							
2	Click Yes to confirm the item should be deleted from the transaction.							
3	Remove the physical item from the transaction.							

If unable to capture a good image, and the option is provided, click Ignore to ignore the image quality warning and continue processing with the poor quality image.

FINAL BALANCE

When all the deposit items have been captured and corrected, the transaction may need to be balanced if the deposit amount has changed.

Step	Action
1	Press Enter on the keyboard after reviewing each item.
2	Select "Use the scanned amount".

If there are no issues it will show the remaining as 0.00 and Deposit is balance and ready to be closed in green: (see next page)

Check that routing, account and amount numbers are correct. When deposit is balanced and read to be closed, click Close.

	Location: EIRET DACIETC GDOLLD Son Locate Court & (20000124201)	
Deposit 7,681.84 - Checks 7,681.84 = 0.00	Scan Scanner 🏟 Free Track Rescan Delete Item Item Details	Close
Item List		Routing Transit
Document Type Amount	Item: 2 of 2 D C O 🗗 Q 🔀	031100225
1 🗹 Deposit Ticket 7,681.84	tic field and direction of the set of the set of	Account
2 Check 7,681.84	BERKADIA COMMERCIAL MORTGAGE WELLS FARGO BANK CHECK NO.	2079950066738
	AMBLER PA 19002-0000 (Protected by Payee Positive Pay)	Sorial
	August 04, 2020	0761439
	\$7,681.84	Amount
	PAY SEVEN THOUSAND SIX HUNDRED EIGHTY-ONE DOLLARS AND 84 CENTS	7 681 84
	Xes-GO	
	TO San Lorenzo Court Apartments	
	OF San Francisco CA 94123-0000 Dora Se Martino	
	vold after 180 days	
	"O?61439" CO31100225" 2079950066738"	
	Deposit is balanced and ready to be closed.	
Item Details		
udit Trail Status Message	Out of Documents	
	out of bottiments	

It will give you 3 options:

Select Release when the deposit is correct and okay to process.



Now it will have your deposit batch highlighted in blue. Select Transmit Selected Deposit if it is correct and okay to process to the bank:

Hom	e	Capture 🗸	Transmit 🗸	Analytics 🗸 Training 🕇	Admin 👻							
Transmit Status												
		Туре	Status	Description	Amo	ount	Processing Date	Posting Date	Acknowledged Date	Location	Batch ID	In Balance
B		Deposit	Released	San Lorenzo Court As (80000184)	391) 7,683	1.84	08/11/2020			FIRST PACIFIC GROUP		Yes

It will show the highlighted when deposit has been transmitted successfully, Status will go from Released to Acknowledged.

Home	ome Capture - Transmit - Analytics - Training - Admin -									
Transmit Status										
Filter	Filter Transmit Selected Deposit(s) Delete Selected Deposit(s)									
	Туре	Status	Description	Amount	Processing Date	Posting Date	Acknowledged Date	Location	Batch ID	In Balance
2	Deposit	Acknowledged	San Lorenzo Court As (80000184391)	7,681.84	08/11/2020	08/11/2020	08/11/2020 11:10:00 AM PDT	FIRST PACIFIC GROUP		Yes

Click the PDF icon to print a report.

Но	Home Capture - Transmit - Analytics - Training - Admin -										
Tr	Transmit Status										
				industrial objected pepusit(s		necced Deposic(5)					
		Туре	Status	Description	Amount	Processing Date	Posting Date	Acknowledged Date	Location	Batch ID	In Balance
ß	1)	Deposit	Acknowledged	San Lorenzo Court As (80000184391)	7,681.84	08/11/2020	08/11/2020	08/11/2020 11:10:00 AM PDT	FIRST PACIFIC GROUP		Yes

<u>Please take a screenshot of this to email to your Accountant as deposit confirmation as checkscan will no</u> <u>longer email you the confirmation.</u> The cutoff for deposits is 6:00PM PST

If you need to delete the entire transaction please note:

A transaction can only be deleted if it has not yet been transmitted to the central site.

DEFERRING BATCHES

If you need to leave the application prior to closing the transaction or want to save the batch to add more checks to it later:



The transaction is listed in the main capture screen as an Existing Deposit.

If you are in the middle of capturing a deposit and you experience a power outage or lose internet connectivity, the system will automatically defer the deposit.

HOW TO COMPLETE A DEFERRED TRANSACTION

Follow these steps to complete a transaction you have deferred or a transaction that has been deferred because of a power outage or internet connectivity issue.

Step	Action
1	In the main capture screen, highlight the transaction to complete.
2	Click Edit Deposit.
3	Complete the transaction in the capture screen.
4	Release the transaction for transmission.

If you ever need to pull up the deposit confirmation again or research previous deposits, you can go to Analytics \rightarrow Reports:



Select Deposit Reports then click Deposit Detail. Enter a start and end date, select the location and an account(s) and click Generate Report:

Home Capture - Transmit - Analytics - Train	ing 🗸 Admin 🗸	
Reports		
Admin Reports	Deposit Detail	
Deposit Reports Deposit Adjustment	Start Date	08/11/2020
Deposit Detail	End Date	08/11/2020
Deposit Detail (by Deposit)	Locations	* FIRST PACIFIC GROUP
Deposit Detail (with Custom Fields)		
Deposit Summary	Accounts	× San Lorenzo Court As (80000184391)
	Generate Report	

Click the Print and/or Download icons.

ail Report blic Bank 01:23:54 PM by ewagner Date Range: 8/11/2020 - 8/11/2020 Account Number Process Control & Amount * San Lorenzo Court As (80000184391) > Deposit Amount: \$7,681.84 2079950066738 (\$7,681.84) eposit Amount: \$7,881.84	Capture + Transmit + Analytics + Training + Admin +	Transmit + Analytics + Training + Admin +	Analytics • Training • Admin •	Training 🕶 Admin 👻	Admin +								Erir	n Wagner	-	sign (
ail Deposit Detail Report First Republic Bank Report Created on 8/11/2020 1:23:54 PM by ewager: Presenter: FIRST PACIFIC GROUP Date Range: 8/11/2020 - 8/11/2020 Location(s): FIRST PACIFIC GROUP - Acct: San Lorenzo Court As (80000184391) User: ewagner - Item Court: 2 - Deposit Amount: 57,881.84 3.2 0761439 031100225 207995006738 (57,681.84) 3.2 0761439 031100225 207995006738 (57,681.84) Total Item Court: 2 - Total Deposit Amount: 57,881.84																
Deposit Detail Report First Republic Bank Report Created on 8/11/2020 1:23:54 PM by ewagner Presenter: FIRST PACIFIC GROUP Date Range: 8/11/2020 - 8/11/2020 - 8/11/2020 Location(s): FIRST PACIFIC GROUP Account Number Process Control Amount Research ID Aux On Us Transit Routing Count Number Process Control Amount User: ewagner ~ Item Count: 2 ~ Deposit Amount: \$7,681.84 Processed: 8/11/2020 - Acknowledged: 8/11/2020 Acknowledged: 8/11/2020 - Acknowledged: 8/11/2020	e	tail						1/	1					Ċ	Ŧ	æ
Presenter: FIRST PACIFIC GROUP Date Range: B/11/2020 B/11/2020 Location(s): FIRST PACIFIC GROUP Account(s): 80000184391 Research ID Aux On Us Transit Routing Account(s): 80000184391 Location(s): FIRST PACIFIC GROUP ~ Acct: San Lorenzo Court As (80000184391) Amount Location: FIRST PACIFIC GROUP ~ Acct: San Lorenzo Court As (8000184391) Use: evaguar Use: evaguar - Location(s): FIRST PACIFIC GROUP ~ Acct: San Lorenzo Court As (8000184391) Use: Use: Value Amount - Use: evaguar - Item Count: 2 ~ Deposit Amount: 57, 681.84 San Lorenzo Court As (8000184391) San Loren						First Rev Vyptige and	REC BANK	Deposit Deta First Repub	il Report lic Bank 1:23:54 PM by ewagner							
Location(s): FIRST PACIFIC GROUP Account(s): 80000184391 Research ID Aux On Us Transit Routing Account Number Process Control Amount Location: FIRST PACIFIC GROUP ~ Acct: San Lorenzo Court As (80000184391) Use: ewagner ~ Item Count: 27, 081.84 Use: ewagner ~ Item Count: 27, 081.84 Processed: 8/11/2020 - Acknowledged: 8/11/2020 - Acknowledged: 8/11/2020 + Acknowledged: 8/11/2020 319 \$7,681.84 3-1 510106690 80000184391 319 \$7,681.84 3-2 0761439 031100225 2079950066738 (\$7,681.84) Total Item Count: 2 ~ Total Deposit Amount: \$7,681.84						Presenter: FIRST	PACIFIC GROUP		Da	ite Range: 8/11/20	020 - 8/11/2020					
Research ID Aux On Us Transit Routing Account Number Process Control Amount Location: FIRST PACIFIC GROUP ~ Acct: San Lorenzo Court As (80000164391) User: ewagner ~ Item Count: 2 ~ Deposit Amount: \$7,681.84 - Processed: 8/11/2020 - Acknowledged: 8/11/2020 + Acknowledged: 8/11/2020 - 3-1 510016690 80000164391 3-2 0761439 031100225 2079950066738 Total Item Count: 2 ~ Total Deposit Amount: \$7,681.84						Location(s): FIRS	T PACIFIC GROUP			Account(s)	: 80000184391					
Location: FIRST PAC/IFIC GROUP ~ Acct: San Lorenzo Court As (80000184391) User: ewagner ~ Item Count: 2 ~ Deposit Amount: \$7,681.84 Processed: \$1/12020 Acknowledged: \$1/12020 3-1 510016690 80000184391 3-2 0761439 031100225 2079950066738 Total Item Count: 2 ~ Total Deposit Amount: \$7,681.84						Research ID	Aux On Us	Transit Routing	Account Number Pro	ocess Control	Amount					
3-1 510016690 80000184391 319 \$7,681.84 3-2 0761439 031100225 2079950066738 (\$7,681.84) Total Item Count: 2 ~ Total Deposit Amount: \$7,681.84							Location: FIRST PACI User: ewagr Processed: 8/11/2020	FIC GROUP ~ Acct: ner ~ Item Count: 2 ~ ~ Acknowledged: 8/	San Lorenzo Court As (Deposit Amount: \$7,68 11/2020 1:10 PM ~ Post	80000184391) 1.84 ed: 8/11/2020						
3-2 0761439 031100225 2079950066738 (\$7,681.84) Total Item Count: 2 ~ Total Deposit Amount: \$7,681.84						3-1		510016690	80000184391	319	\$7,681.84					
Total Item Count: 2 ~ Total Deposit Amount: \$7,681.84						3-2	0761439	031100225	2079950066738		(\$7,681.84)					
							Total Item	Count: 2 ~ Total De	posit Amount: \$7,681.	84						

Deposit Summary will show you the deposits that were processed for the chosen account:

FIRST REPUBLIC											
Deposit Summary Report by Transaction											
	First Republic Bank										
Report Created on 7/13/2016 2:31:20 PM by rowenako											
Presenter: FIRST P	ACIFIC GROUP		Date Range: 7/13/20	16 - 7/13/2016							
Location(s): FIRST	PACIFIC GROUP - Scanne	er 1									
Transaction ID	Acknowledge Date	Posting Date	Amount	Item Count							
Location: FIRST	PACIFIC GROUP - Scanne	r 1 ~ Processing Date: 7/1 (80001495861)	3/2016 ~ Account: First P	acific Group							
1	7/13/2016 2:12 PM	7/13/2016	\$35.00	2							

Deposit Details will show each specific check:

FIRST REPUBLIC									
Deposit Detail Report									
		First Repub	lic Bank						
	Report Cr	eated on 7/13/2016	2:34:33 PM by rowe	nako					
Presenter: FIR	ST PACIFIC GROUP			Date Range: 7/13/2	2016 - 7/13/2016				
Location(s): FI	RST PACIFIC GROUP - So	anner 1		Account(s): 80001495861					
Research ID	Aux On Us	Transit Routing	Account Number	Process Control	Amount				
l	ocation: FIRST PACIFIC	GROUP - Scanner 1	~ Acct: First Pacific	Group (8000149586	1)				
	User: rower	nako ~ Item Count: 2	2 ~ Deposit Amount:	\$35.00					
	Processed: 7/13/2016	~ Acknowledged: 7/	/13/2016 2:12 PM ~ F	Posted: 7/13/2016					
1-1		510016690	80001495861	319	\$35.00				
1-2	027187	041000124	4252629946		(\$35.00)				
	Total Item Count: 2 ~ Total Deposit Amount: \$35.00								

You can also search for specific checks by going to Research:



Input search parameters.

Example: Search by "Check amount". Enter Start and End dates, Location, and Amount equal information. Click Search and it will bring up the results.

Research	Search for Deposit Item							
Research Deposits Search for Deposit Item	Start Date 08/11/2020				End Date 08/11/2020			#
Search for Deposit Transmission	× FIRST PACIFIC GROUP						Select All	
	Look for Check					•		
	Where Amount	r is	=	•	7681.84		⊕	
	Sort None	r by	Select a fi	eld in the	list or search by field name	•		
	Show Custom Fields							earch

Click on the line to get to the check image.

Back								
Item Resear	rch Results	s 📕						
View Trans	ID	Process Date	Source	Location	ABA Number	Account	Serial	Amount
	3-2	8/11/2020	Scanner	FIRST PACIFIC GROUP	031100225	2079950066738	0761439	\$7,681.8 _
4								•
Export								
Show Custom Fi	ields							

Check image scans are available on the website for 60 days from the date they are scanned in.

Back					
Item Research Results					
View Trans ID Process Date Source	Location	ABA Number	Account	Serial	Amount
3-2 8/11/2020 Scanner	FIRST PACIFIC GROUP	031100225	2079950066738	0761439	\$7,681.8 🗘
4					• •
Export					
Show Custom Fields					
BERYADIA COMMERCIAL MORTGAGE 323 NORRISTOWN RO. 2000 MBBLER PA 1900/2000 (Protected by Payee Positive Pay) PAY SEVEN THOUSAND SIX HUNDRED EIGHTY-ONE DO TO San Lorenzo Court Apartments THE 39 Avila Street ORDER San Francisco CA 94123-0000 OF #*0 76 14 39#* •:0 31100 2255: 20	ARGO BANK ARGO BANK IMAGO BA	View PDF Account: 20 Amount: 76 Routing Tra Process Col Tracer: 202 Auxiliary: 0 Description EPC: Source: Sca	079950066738 581.84 ansit: 031100225 ntrol: 20081190032613000 0761439 I: Check anner	030002	

For setting up users and access/permissions changes contact your Regional Manager

For troubleshooting related to computer settings please call First Republic's help line at 800-221-9777, option 1 (Hours of Operation: Monday through Friday, 6:00AM PST until 5:30PM PST).

When you have a receivable that is unable to be scanned into First Republic & needs to be mailed to the bank, please scan and save a copy in the resident's attachments in Yardi in case the original is lost in the mail.

This check or Money Order should be entered as a separate receivable batch. Send the check to the bank with the self addressed stamped envelope and write "For Deposit Only" and the account number on the back.

Elearning – First Pacific University

Reporting

To track you teams progress click Visit Group Supervisor – Reporting Mode

FIRST PACIFIC FIRST PACIFIC UNIVERSITY Image: Comparison of the provision of the										
Becky Pilapil										
	O Announcements		19 Assignments					O Events		
Catalog		(\mathbf{b})	Training Video Library		March	2020		today	< >	
Courses 360 Available					Mon 2	Tue 3	Wed	Thu 5	Fri 6	
Learning Plans 80 Available		0,	eLearning FAQ		9 16	10 17	11 18	12 19	13 20	
Events 23 Available		G	Industry Resources		23 30	24 31	25 1	26 2	27 3	

- Then click the Reports Tab to bring up the screen below. Use the filters provided to refine your report
- 1. Report Type
- 2. Date Range
- 3. Property, Job Title, etc.

FIRST PACIFIC FIRST PACIFIC UNIVERSITY	BP Visit Student Mode
Dashboard Reports Users +	
Reports	2
Filter:	3 After
Group: (All Common	Date: 02/01/2020 Before
Select at least one group	User field: Select a Filter 🔹
View All Course Event	Test: Select a Filter More Filters
Due Depart	

Elearning – First Pacific University

1 of 1 Find | Next Top Courses Course Summary Popular Events Event Summary 8 Started 1 Events 7 Completed 0 RSVP 3hrs 82 Pages Read 0 Attendees 9hrs Spent Learning None Spent Learning 2hrs 1min Test Summary Event Test Summary 33mins 97% Avg Passing Grade 0% Avg Passing Grade 36mins 1hrs 51% Avg Grade 0% Avg Grade 53mins 55mins 1.20 Avg Attempts NaN Avg Attempts 0 Test Passed 5 Test Passed No Data Available 0 Test Attempts 6 Test Attempts Avg ♦ Test 🛛 🕶 User Passing Spent Activity Detail Status Attempts Score Completed: 1 Passed Wagner, Erin E AO 200 - Voyager 1099 Processing 87% 3hrs 12/5/2019 1 Attempt Completed: 1 Passed E Wagner, Erin AP 104 - Voiding Checks in 7S 100% 55mins 12/10/2019 1 Attempt Completed: 1 Passed Wagner, Erin AR 108 - Creating Non-Person Receipts in 7S 100% 33mins 12/10/2019 2 Attempts Completed: 1 Passed ٨ Wagner, Erin BR 100 - How to Do a Bank Reconciliation in Voyager 7S 100% 53mins 12/12/2019 1 Attempt Completed: 1 Passed Wagner, Erin BR 150 - Using Reconciling Items in Voyager 7S 100% 36mins 12/12/2019 1 Attempt Not Completed Wagner, Erin BR 200 - Bank Reconciliation Reports in Voyager 7S П 1hrs Completed: Wagner, Erin FGHR 102 - Benefits Overview 1min 12/10/2019 Completed: Wagner, Erin FGHR 103 - Midwest HR Employee Platform Review E 2hrs 12/30/2019 Not Completed Wagner, Erin BF 200 - Budgeting and Forecasting Setup 15secs

• The report will then display beneath the filters





Elearning – First Pacific University

Assigning Courses

- Click the Users tab at the top of the page.
- Search as needed to find the team member being assigned a course, then click Edit to the right of their name.

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Users First Name Erin Advanced	Last Name	Email		User Name	
Name	Email	User Name	Role		
Wagner, Erin	ewagner@fpacific.com Page	ewagner0713 size: 20 💌	Ť	Export Vie	Edit 💌

On the users page, navigate to the Course Tab

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First Name:	Erin	Address:			
Last Name:	Wagner	City:			
Email:	ewagner@fpacific.com	State:	California	Ŧ	
Phone:		ZIP/PC:			


Elearning – First Pacific University

Click Add

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Search for the course you'd like to assign in the search bar, then click Assign

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Page 1 of 2 Page 1		Close 28

Elearning – First Pacific Group

• To modify the due date once assigned, click the 3 dots next to the info box and select edit due dates. Enter the new due date for the course.

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General Reminders / Policy

1. Lease Signing Workflow

- 6 Days from Move-in: Leasing team sends email asking for utility confirmation numbers, confirming their move-in date & charges, and asking if anything needs to be changed or added, like a pet or parking, etc.
- 4 Days from Move-in: Phone call to obtain confirmation numbers if not yet received and request all pet documentation be received. Let resident know they will be receiving the lease agreement to sign and once countersigned they will be able to log into the portal to pay their move-in fees.
- 3 Days from Move-in: Manager generates and finalizes the lease to send to the resident to sign.
- 2 Days from Move-in: No more than 2 days before move-in, the manager countersigns the lease. Leasing calls/emails to let the resident know the lease has been countersigned and they need to log in to make their payment prior to picking up keys. Set appointment to pick up keys.

2. Application Approvals – Ruanne reviews all applications for all sites. Jane reviews criminal for all sites.

3. Transfer Policy – Unit transfer system function in CRM will only be used when ALL residents from one unit are ALL transferring to a new unit on the same property. If any resident from the old unit are leaving or any residents are being added to the new unit, the Transfer Function in CRM will NOT be utilized. If old residents are leaving or new ones being added on, they will all go through the Online Application process to register and reserve the new unit and will be auto screened to qualify for the new unit. Even though we are making them register like new, does not mean we cannot still use the 'transfer' verbiage and our 'transfer' policy when talking with the resident.

4. Service Animals – Will be tracked via memos in the resident data. Select Service Animal as the type. Enter the animal that was approved and the date. This should only be once the Reasonable Accommodation is approved by the Regional. Enter all that you are knowledgeable about now and add upon renewal going forward.

5. Lock Out Policy – In an effort to assure we are acquiring identifying information from anyone who has been locked out of their apartment a Resident Directory will be emailed to the Manager and Maintenance Supervisor EVERY Friday. The report must be printed by 3pm on Friday and placed on a clip board by the key box. If On Call Maintenance is called out for a lock out, they are to check the report FIRST to assure the person wanting access is a Resident with legal access. The On Call person will check the ID of the caller. The ID # must be written on the attached form with the rest of the required info in the box in the left-hand corner. Please note that most properties are charging \$50 but the attached form needs to be updated if your property charges more. This Lock Out form should be left on the clip board with the resident info, so the manager call apply the charge the next day

6. HR Communication - Only regionals will contact HR (MidwestHR). Managers will bring any issues to Regionals attention and not be copied in the correspondence with MidwestHR. Regionals will inform Managers once the issue is resolved.

General Reminders / Policy

7. Cancelling a NTV - Effective immediately, when a resident wishes to cancel their Notice to Vacate, you will need to regenerate the NTV form from their resident account and delete out all information with exception of the following:

1.Date- Enter the current day's date

2.Reason For Moving- Click the drop-down menu and select 'Rescind NTV'

3.Community Suggestions- Enter 'Resident is cancelling their notice to vacate' 4.Click Save.

You will then Preview and regenerate and finalize the Notice to Vacate form in Online Documents which will email the resident (s) to sign that they are cancelling their notice. Once all residents have signed, you will countersign and cancel their notice via the Leasing Actions button.

8. Criminal Denial Policy - Updated criminal denial:

(c) Management can deny any applicant whose tenancy would reasonable be expected to have a detrimental effect on other tenants, the environment of the community, or where an applicant's history would evidence an inability to comply with the lease terms or a likelihood of interfering with the management staff.

(d) Anyone having been convicted of a felony offense against persons and/or property or involving controlled substances or deadly weapons. This is included but not limited to conviction of distribution or manufacturing of a controlled substance, physical violence, destruction of property, sex offenses and criminal activity that would adversely affect the health, safety or well-being of other residents or cause damage to the apartment community.
(e) Anyone currently under Parole or Probation Supervision.

9. Last Minute Renewals - For any pending renewals in the 'Selected' status that are due to expire, the Renewal Lease proposal should be Cancelled later than 5pm on the day the lease expires. This is done by clicking on Scheduled Renewals and clicking the cancel button next to the resident. Create a calendar reminder on the day leases are due to expire at your property to check for expiring leases that have not signed the renewal. This will remove the option to 'Sign' the document in the Resident's Portal. Resident will automatically roll Month-to-Month the following day. If they decide that they want to renew, create a new proposal for the 1st of the following month and approve it. The resident can then Select the proposal and a new renewal lease can be generated and finalized. If this process is not followed, we should NEVER counter-sign a Renewal Lease for a resident who has rolled Month-to-Month.

10. Leader of the Day - Leader of the day (office) Each day a new team member will be leader of the day for the office staff. The leader will assure the daily task list is being completed and confirm with all if any assistance is needed to stay on track. The team member will set an intention for the day such as a goal or quote. This will allow each team member to learn to lead and to know they have a voice as part of the team.

11. Maintenance Huddles - In order for all of Maintenance to know what the priorities of the day are each team will hold a DAILY Maintenance Huddle. In this huddle work order, turns and any projects for the day should be discussed. Work orders should be assigned and Make ready checklist provided for the units that will be turned. Each meeting should only take approximately 15 minutes. This huddle will also allow any questions to be answered first thing in the morning and to make sure no emergencies occurred over night. There will be a different team member who leads the huddle each morning but, the maintenance supervisor will provide the information. This will allow all to become comfortable leading a team and knowing they have a voice as part of the team.

General Reminders / Policy

12. Make Ready Dates - Make ready dates will not default beyond 7 days. OH & MI set to 5 days effective 8/23/19. All sites to have the following policy as a "safety net" : ONLY managers cancel applications and correct make ready dates. Ruanne to review make ready dates before denying an application and then will adjust after it is denied

13. Applications Valid for 75 Days - Please note the highlighted area in which we are allowing an application to be valid for 75 days from the date of application. If they lease a unit outside the 75-day window they will be required to provide current proof of income on the 60th day and criminal and eviction check will be re-run to assure no issues have popped up.

14. Income Criteria –

1). One month's worth of paystubs is the required method of verifying income. If you do not have your last month's paystubs, we will require written employment verification and the past 2 months of bank statements.

2) Add to criteria, applicant is required to provide confirmation proof of utilities in their name prior to move in. If utility debt is in their name, either confirmation of pay off or confirmation number is required.

- 15. Remove Roommate Manager / Assistant Manager should complete the process
- All Remaining leaseholders must submit their 2 most recent paystubs to confirm they qualify.
 - All leaseholders must have been screened through Fp. If they have not, they must be screened
 - If a guarantor is being removed. Screening must be run on the remaining residents if additional deposit is required, must be paid prior to guarantor being removed.
- Once all paystubs have been received and any screening required is completed, send to Ruanne to approve the removal of the roommate.
- Once approved by Ruanne, generate the Roommate Rider.
 - If the primary resident is the one leaving, you must first complete the roommate rider to remove them. Once signed by all leaseholders and countersigned, you can then use the Promote Roommate function.
 - If roommate is leaving, you can use the roommate rider as instructed.

Incident Report

- Incident Reports should be completed within 24 hours for items such as trip and falls, fires, deaths, etc.
- When completing an Incident Report, you should always include a completed form, pictures, and a witness statement when applicable.
- This form should be saved to the server and emailed to your Regional.

General Liability – When an individual <u>other than an employee</u> is injured onsite, or that individual's property is damaged, this report is to be completed by property management or security. This report should be submitted to Great Prairie Risk Solutions (by email to claims@gprs-inc.com) or faxed to 224-330-6437) within 24 hours of the incident. Photographs of the accident site must be taken as soon as reasonably possible and sent in with this report. This Report is not to be given to the Claimant or to any representative of the Claimant. It is for our records only. The following information must be provided when reporting a general liability claim:						
	PROPERTY IN	FORM	ATION:			
Property:						
Address:			City:		State:	
Phone:	Fax:		Regional Mgr:		Zip:	
Property Manager:						
INC	CIDENT INFORMATION (O	NE F	ORM PER CLAIMANT):		
Date of Incident:		Tir	ne of Incident (AM/PM):			
Person Reported To:		Da	te Reported:	Time (A	M/PM):	
Name of Claimant:		Ma	le or Female:			
Address:		Cit	y:			
Home/Cell Phone:		Sta	ate:	Zip:		
SS# of Claimant:		(S	\$# is required if this is a	n Injury cla	aim.)	
Date of Birth:	Reason on Property (Resident/Guest/ General Public/Employee):	Ho	me Fax:	E-Mail:		
PHOTOS MUST BE TAKEN. Date/Time Photos Taken:						
Lighting Conditions: Outsid	Je	Weat	her Conditions			
Injury/Property Damage Description:						
Exact Location of Incident (on Property):						
Initial Medical Treatment (E	R/Hospitalized/Physician/Clini	c/On-s	site/No Treatment):			
Name of Medical Provider:						
Address:		City,	State, ZIP	Phone	:	
Estimated Cost to Repair P	roperty: \$	Were	Police/Fire Depts. Called	1?		
Name of Fire Dept. Respon	ding:	Name	of Police Dept. Respon	ding:		

IT Support Template

In an attempt to expedite any technical issues and to minimize the back and forth required to help troubleshoot, we have created a template to utilize when emailing an issue or request.

The template below is required to be used for each request submitted. Please copy and paste it into the body of your email and fill in the responses to each item with as mush detail as possible send nbuttner@fpacific.com

IT Support Template

Property:
Issue:
FGPC#:
User(s) Affected:
Did you restart your PC?
Did you apply all pending system updates? (Start -> Settings -> Update & Security -> Check for Updates)
Troubleshooting steps already attempted?
Screen Shots:



Manager's End of the Month Checklist

By noon on the last business day of the month, please ensure each of the following has been completed:

- 1. All deposit accounting has been completed
- 2. Resolve all outstanding balances
- 3. All receivables have been entered
- 4. All payables have been entered
- 5. Timecards & OT Logs are up-to-date
- 6. Confirm all prepays are correct & notify residents
- 7. Bad Debt sent to collections
- 8. Expiring vendor insurance is up to date
- 9. Review Expiring ACH payments
- **10. Monthly Training Completed**
- 11. Safety Meeting completed
- 12. Evictions filed

An e-mail will be sent to you to confirm these items.

All deposit accounting before the 25th has been completed?*:	Yes
Resolved all outstanding balances?*:	930-1A, 966-3A, 978-2A, 1000-2A
All receivables have been entered?*:	Yes
All payables have been entered and financials have been reviewed to confirm no invoices are unpaid?*:	Yes
Time America and OT Logs up-to-date?*:	Yes
Confirm all prepays are correct & Notify residents?*:	Yes
Bad Debt sent to collections?*:	Yes
Updated vendor insurance obtained for next month's expirations?*:	Yes
Reviewed Expiring ACH Payments on Dashboard*:	Yes
Gracehill completed for all employees*:	Completing one per week to catch up.
Safety Meeting Submitted*:	Yes
	5 Filed, 4 Outstanding:
How many evictions were filed and how many are still pending?*:	930-1A 966-3A (PTP) 978-2A (PTP) 1000-2A
How many turns were completed during the month? Please provide upgrade type breakdown, if applicable.*:	25 Turns: 3 New Golds
Name*:	Krystin Brown

Mileage Reimbursement

Please check with your Regional Manager to see what the guidelines are for your property. These are to be submitted one time monthly at the end of the month and include all mileage for that month. Destination section should include detailed notes for where the employee was traveling to and the Apt. number they serviced.

Lowe's/HD runs need manager approval and are for emergencies only. Supplies should be ordered for delivery next day whenever possible to save time and avoid paying mileage.

FIRST PACIFIC N	IILEAGE REIMBURSEME	NT 2022		
58.5 cents/mile re	eimbursed			
Employee:	Haley Cornish			
Property:	SS			
Month:		May-22		
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*Mileage reimbu	Irsement logs must be s	ubmitted the first week of the following	month or will no	ot be paid.
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**Employee mile	eage paid relating to on	-call emergency is capped at 20 miles (e	ach way) and m	neasured

Newsletters

- Each quarter you will submit the information for your community newsletter. Each site has it's own newsletter featuring community announcements and reminders, resident giveaways and events, a calendar of important dates, and events going on in the area.
- You will submit this info via the FG Marketing Order System. The link is found on the Employee Resources webpage.

Marketing Tools:			1		
	→	NEWSLETTER Submissions -	MARKETING AUDITS →	ORDER MATERIAL →	Marketing Tools:

• If you need inspiration you can view past newsletters by clicking the view example link

HOME ORDER MATERIAL T	COLS MARKETING RESOURCE CENTER
FG Newsletter Submission	
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HOPERIT (Inquind)	
vista-del-sol.com	Vista Del Sol - (833) 211-3729
SUBMITTED BY (Required)	Email (Angularit)
Regional Email (Anyoinsi)	
community Announcements (Please Include at least 3 commun	ity announcements. Please include at least 1 positive announcement
or fun information about the property. Please refrain from too (Inquired)	many reminders about what NOT to do. Be as detailed as possible)
TOPIC, ANNOUNCEMENT (One option per line.)	
	/
RESIDENT EVENTS (List all resident events with dates, times,	AREA EVENTS (Please look up events in your area to include on
centences, try to invoke excitement through your description)	calendar so a long description will not fit. Name of event and
(Engward)	location would be fine. ((required)
Date, Description (One option per line.)	Date, Description (One option per line.)
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Newsletters

Once all info is entered on the worksheet and checked click the 'Submit Newsletter' button at the bottom to send to the marketing department for creation. You and your Regional will receive a copy of the info submitted to the Marketing department as confirmation it transmitted successfully. ***BE SURE TO DOUBLE CHECK ALL GRAMMAR AND SPELLING PRIOR TO SUBMITTING***

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r fun Information about the property. Please refrain from too m Inputnut TOPIC, ANNOUNCEMENT (One option per line.)	any reminders about what NOT to do. Be as detailed as possible)
	//
ESEDENT EVENTS (List all resident events with dates, times, ocation and description. Please make the description a couple of entences, try to invoke excitement through your descriptioni) Trywind)	AREA EVENTS (Please look up events in your area to include on the calendar. Two per month is ideal. NOTE: This is going on the calendar so a long description will not fit. Name of event and location would be fine.) (<i>trapares</i>)
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NSF Procedures

- If an ACH payment NSF's you'll be notified by your Accountant, you should then chargeback (as applicable) and late fee (for properties whose late fees aren't auto-posted.)
- On the resident ledger you will then see:

chk# 1005 Pet fee/rent Reversed by ctrl#1238000		570.00	0.00	1237014
Returned check charge	50.00		50.00	1669016
Late fee due to NSF	55.00		105.00	1669017
PEP chargeback due to NSF	25.00		130.00	1669018
chk# 1005 NSF receipt Ctrl# 1237014		(570.00)	700.00	1238000

- Please contact the resident about their current balance due as shown at the bottom of their ledger.
- Some sites don't charge late fees if the NSF is repaid within 24 hours of notifying the resident. In this case, please reverse the late fees when entering the repayment receipt.
- Most sites only allow 2 NSFs before requiring a resident only pays using a cash equivalent.

Star Program

- The star program allows team members to recognize colleagues who go above and beyond by giving shout outs.
- Shouts are now submitted on our home page.
- Managers are given a quarterly amount to spend on employees each quarter. You can reward them with: Special lunch, coffee's, amazon gift cards, donuts, breakfast, t-shirts, etc.
- On our homepage click the shout out button then this screen will pop fill out the info then click submit.

SHARE SOME LOVE!	
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Submit A Shout Out! submit your Shout Outs below. Your name* Community Shout Out Recipient *	



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name@fpacific.com	name@fpacific.com
Shout Out Details * Tell us briefly about your s	hout out details
Need Attachment?	or drag & drop here
Date *	



PTO Request Process

- All PTO requests should be made through the Employee Portal.
- Once logged in, click Request Time Off in the Paid Time Off Section on their dashboard.

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•	Personal >	Pay	Paid Time Off	Benefits
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*	Performance Management		Events	•
	About Privacy Lang: English		0	No Unread Messages
			No Events Scheduled	► View More

• Select PTO 40hours for regular full time employees from the PTO type dropdown and enter Dates, Hours and Comments. Then click submit.

Include Weekends * Start Date 03/13/2020 Image: Comment Vacation Fri 03/13/2020 Image: Start Date Image: Start Da	PTO 40hours			٣	
* Start Date * End Date 03/13/2020 O3/16/2020 Comment Vacation Revlew Hours Fri 03/13/2020 8 h m m Mon 03/16/2020 8 h m m Bequest Total: 16 Hours	Include Weekends				
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You will then receive an email to approve the PTO request. If it is approved by your regional please add it to your site's HR/PTO calendar that you share with your regional.



- You will be taken to your Time Clocks Plus dashboard which shows a quick overview of items that may need your attention such as Required Approvals, Missed Punches, and Overtime logged.
- To review punches, you can click on **Hours** on the top menu and then review **Individual Hours** or **Group Hours** for your employees



Note that you can review hours by updating the start date and stop date manually, or by selecting a period from the dropdown, such as **This Week, This Period**, or **Last Period** and clicking the **Update** button.

Erin Wagne	er j				Job Co	de Filter	Locat
5/2/2020	i to 5/8	/2020		This Week		4	Update
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If you need to edit a punch, select the row and click the **Manage** button (or hover over the row you want to edit and right click to see your options) where you can click **Edit**, **Delete** or **Add break**.

•	×۶	r V	Notes	Edited	C	Time In	Time Out	Hours	Shift Total	Week Total	Job Code
•						4/27/20		8.00	8.00		1 - Work
٠				Y		4/27/20	Edit	1.00	1.00		150 - Missed Break
•						4/28/20	Delete	8 .25	8.25		1 - Work
•				Y		4/28/20	Split segment by length	1.00	1.00		150 - Missed Break
٠					E.	4/29/20	Split segment by percentage	8 .00	8.00		1 - Work
•				Y		4/29/20	Add break	1.00	1.00		150 - Missed Break
٠					E.	4/30/20	Toggle break	8 .00	8.00		1 - Work
•				Y		4/30/20	Audit Log	1.00	1.00		150 - Missed Break
•			Ē		E	5/1/202	View segment photos	8 .00	8.00		1 - Work

To **Edit**, you will get a popup window where you can change the date in/out & time in/out. You can also indicate if you are updating due to a missed punch, and whether the person is currently clocked in with the check boxes on the left. If this shift may result in payroll add a note indicating what the approved OT was. After adjusting click **SAVE**

Edit Segment		?
Individual is clocked in	Segment Length: 8.	00
Time sheet entry	Time in 4/27/2020 🛗 09:00 AM 🕓	
Edit actual time	Time out 4/27/2020 🛗 05:00 PM 🕓	
Missed in numb	Break type << NONE >>	
Missed out punch	Job Code 1 - Work	
	Location << NONE >> Select	t
	Note	
Custom Extra	Cancel	e

To add a missed break, you will enter the start time and length on the popup and click **Save**:

Add Break		?
Time in 5/4. Time out 5/4.	/2020 09:00 AM /2020 06:00 PM	
Date	5/4/2020	
Time	12:30 PM O	
Break length	60	
Break type	Break	
Note		
	Cancel	/e

To **Add** a shift, click the Add button where it will bring up a popup exactly like the Edit Segment popup, where you can fill in all info about the missing shift. Only the available options for that specific employee will show in the dropdown list:

Job Code	1 - Work
Location	1 - Work
Note	2 - PTO
	3 - Anniversary
/S I	4 - Stars
	5 - Sick
_	6 - Bereavement
	7 - Hol
	8 - Unpaid Leave
	9 - COVID-19

- In **Group Hours** you can select a period to show all employees' punches for the period. You can edit here as well!
- For Regionals who want to view only one property's hours at a time: click the Employee Filter button and go to Employee Role, where you will select both hourly and salaried employees at one site to see everyone.
- When you have reviewed the hours for an employee and they are correct, you have to
 Approve them in the system. You can do this in Individual Hours or all at once in Group
 Hours. Pay special attention to any PTO taken each period, and make sure it has been
 entered correctly!

	÷)	ne Baines di Yan Engliste]		MYCO	MPAN	IY	MY EMPLOYEES	MY PAYROLL	s 📄 ★			٩	≥ ⁹⁹ ⊘	r .	1
Payroll /	Chan	ge / T	Time &	Labor						Company: (8164) First Pacific Group, I	nc					- -
	Ma	inage		Ð	xceptions	5	Re	solve Perio	od								^
	м	anago	er appi	oval	rdone	z 📘	- Add									Regular 37.50	от1 0.00
C		•	⊳	¢.	Notes	Edited	0	Break length	Time in	Actual time in	Time out	Actual time out	Hours	Shift total	Day total	Week tota	
0		•			B		Г	60u	Mon 10/26/2020 08:00 AM	Mon 10/26/2020 08:01 AM	Mon 10/26/2020 02:07 PM		6.12				
C		•					L		Mon 10/26/2020 03:07 PM	Mon 10/26/2020 03:02 PM	Mon 10/26/2020 05:45 PM	Mon 10/26/2020 05:47 PM	2.63	8.75	8.75		
C							Г	60u	Tue 10/27/2020 08:00 AM		Tue 10/27/2020 12:29 PM		4.48				
0		•					L		Tue 10/27/2020 01:29 PM	Tue 10/27/2020 01:28 PM	Tue 10/27/2020 06:00 PM	Tue 10/27/2020 05:57 PM	4.52	9.00			
C		•							Tue 10/27/2020 08:15 PM	Tue 10/27/2020 08:09 PM	Tue 10/27/2020 08:30 PM	Tue 10/27/2020 08:31 PM	0.25	0.25			
C		•			B	Y			Tue 10/27/2020 09:15 PM	Tue 10/27/2020 09:10 PM	Tue 10/27/2020 09:30 PM	Tue 10/27/2020 09:25 PM	0.25	0.25	9.50		
C		•					Г	60u	Wed 10/28/2020 08:00 AM	Wed 10/28/2020 08:03 AM	Wed 10/28/2020 12:46 PM		4.77				
C		•					L		Wed 10/28/2020 01:46 PM	Wed 10/28/2020 01:47 PM	Wed 10/28/2020 05:15 PM	Wed 10/28/2020 05:19 PM	3.48	8.25	8.25		
C		•					Г	60u	Thu 10/29/2020 08:45 AM	Thu 10/29/2020 08:47 AM	Thu 10/29/2020 01:48 PM		5.05				
C		•			Ð		L		Thu 10/29/2020 02:48 PM	Thu 10/29/2020 02:47 PM	Thu 10/29/2020 05:15 PM	Thu 10/29/2020 05:09 PM	2.45	7.50	7.50		
0		•							Fri 10/30/2020 08:00 AM		Fri 10/30/2020 11:30 AM	Fri 10/30/2020 11:25 AM	3.50	3.50	3.50	37.50	

- Before submitting payroll, all employees will need to approve their own time one of two ways:
- Signing printed timecards (as we have done in the past)
- Via the TCP employee approval boxes per the instructions below:
- Employees will log into the time clock the same way they would Clock in, and selecting Log on to Dashboard



• Then View → Hours



- And select all checkboxes to approve all hours submitted. Employees can select the top box with the E ✓
 to approve all of their hours in the period. This will take the place of employees signing timecards for the
 period.
- It's ok if some employees approve online and others sign the report, as long as everyone approves each payroll that is submitted by the Tuesday of payroll week.

To review hours for termed employees

From Individual Hours, you can use the Employee Filter to included terminated individuals- Take away that check mark for Employee Status and hit Filter, then you can find them in the list:

							Return	in tutorial		First Pacific
企	HOURS	SCHEDULES	EMPLOYEE	REPORTS	TOOLS	CONFIGURATION	COMPANY			
IND 5		HOURS Coup Hours	Mass Hours	Period Export	Time Sheets			Preview Load	? Save as	Feedback Reset All
Showld 2 3 6 7 8 9 11 13	ng 88 records of 88 Jamie Harroun Connor Westhov Catherine Steffer Sandra Sturis Jeffrey Bennett Philip Pratt Michael Park Elizabeth Goodria	en No er	nployee is sele	Job Code Classificat Departme Location Employee Schedule (Manager Job Classe Provision Qualificati Hire Date	lon nt Role Sroup S	Exclude suspended Exclude terminulated Exclude salaried Exclude full tarve Exclude full tarve Exclude employees with	no work statue			
14 15 16 17 18	Aaron Matthews Michael Pasikows James Drake Matthew Lucero Bruce Cole	ski		Days Empl Custom Fi Summary 114 of 114 em	oyed Elds ployees match	Ø			Cancel	Filter

<u>Reports</u>

• Navigate to **Reports** → **Period Reports**

Period Reports Scheduler Reports	þ	HOURS	SCHEDULES	REPORTS	TOOLS	COMPANY
				Period Reports	Scheduler	Reports

- The reports in the Payroll & Job Code categories will be most useful to review. Complete Payroll shows each employee's punches each day, weekly totals, and a summary of Regular/OT/PTO hours. Feel free to browse around and see which other reports you find useful.
- You will select the Payroll category, and the Complete Payroll report, then change the Period to This
 Period (either by typing it in the field or selecting it from the dropdown) and click the Preview button to
 generate. You will get a popup while it generates but it should be very quick, and then you can select the
 Preview button to see the report. Once you have approved all payroll, this is the report you can print for
 employees to sign and save on the server.

1	D	In	In	Out	Time Out	Job Code	Hours	Reg	Ovt1	Ovt2	Day Total	I	м
	Mon	4/27	07:48 AM	4/27	04:52 PM	1	9.07	9.07	0.00	0.00	9.07	-	
	Tue	4/28	05:51 AM	4/28	03:00 PM	1	9.15	9.15	0.00	0.00	9.15		
	Wed	4/29	09:00 AM	4/29	05:00 PM	2	8.00	8.00	0.00	0.00	8.00		
	Thu	4/30	09:00 AM	4/30	05:00 PM	2	8.00	8.00	0.00	0.00	8.00		
	Fri	5/1	07:49 AM	5/1	03:00 PM	1 k 1 Totals:	7.18	7.18	0.00	0.00	7.18	-	
					wee	x I Totals.	41.40	41.40	0.00	0.00	41.40		
2	Mon	5/4	06:00 AM	5/5	05:45 AM	1	23.75	23.75	0.00	0.00	23.75		
	Tue	5/5	05:45 AM	5/5	03:00 PM	1	9.25	9.25	0.00	0.00	9.25	_	
					Wee	k 2 Totals:	33.00	33.00	0.00	0.00	33.00		
					Peri	od Totals:	74.40	74.40	0.00	0.00	74.40		
					JOB COD	E BREAKDO	OWN						
			Job Code	Descript	tion Regu	lar Overtir	ne1 (Overtime 2	Total				
		-	1	Work	58.	40	0.00	0.00		-			
			Jop (Code 1 To	otal: 58	40	0.00	0.00	58.40	-			
			2	РТО	16.	00	0.00	0.00					
			Job C	Code 2 To	otal: 16.	00	0.00	0.00	16.00	-			
			1	Period To	otal: 74.	40	0.00	0.00	74.40				

• Another useful report is under the category **Job Code** → **Job Code Group Detail.** Again, change the period and click Preview to see a more condensed version of all hours logged.

1	Tahnae Beckett	1-Work	4/27 07:48 AM	4/27 04:52 PM	9.07	9.07	0.00	0.00
		1-Work	4/28 05:51 AM	4/28 03:00 PM	9.15	9.15	0.00	0.00
		1-Work	5/1 07:49 AM	5/1 03:00 PM	7.18	7.18	0.00	0.00
		1-Work	5/4 06:00 AM	5/5 05:45 AM	23.75	23.75	0.00	0.00
		1-Work	5/5 05:45 AM	5/5 03:00 PM	9.25	9.25	0.00	0.00
		2-PTO	4/29 09:00 AM	4/29 05:00 PM	8.00	8.00	0.00	0.00
		2-PTO	4/30 09:00 AM	4/30 05:00 PM	8.00	8.00	0.00	0.00
				Subtotal for 1:	74.40	74.40	0.00	0.00

Job Code Group Summary is even more condensed, just showing totals for the period:

1	Tahnae Beckett	1-Work	58.40	58.40	0.00	0.00
		2-PTO	16.00	16.00	0.00	0.00
		Subtotal for 1:	74.40	74.40	0.00	0.00
3	Annastasia Tuttle	1-Work	52.30	52.30	0.00	0.00
		Subtotal for 3:	52.30	52.30	0.00	0.00
4	Rebecca Pilapil	1-Work	45.40	45.40	0.00	0.00
		150-Missed Break	4.00	4.00	0.00	0.00
		Subtotal for 4:	49.40	49.40	0.00	0.00

Recommended Settings for Managers in TCP

All of the items below can be found if you navigate to Hours → Individual Hours and click the **Options** button:

Display section under Worked Hours, this will show actual times in addition to rounded times for all employees- you may or may not want this enabled- your call!

Display actual punch times in addition to rounded times

Always display actual times

Display section under **Worked Hours**, this will show the day of the week for all punches:

Display day of week for each time in/out

• **Display** section under **Worked Hours**, this will show Total hours for each day:

Display total hours for each day

Warnings section, this will stop the popup from asking about rounding actual time each time to

edit:

Warnings
Actual Time
\bigcirc When editing the rounded time, change the actual time to the rounded time
Always keep actual times
Always prompt

Settings section, this will enable the system to round for manually entered shifts:

 Perform punch rounding on added shift segments Perform break rounding on added shift segments 	Rounding
Perform break rounding on added shift segments	Perform punch rounding on added shift segments
	Perform break rounding on added shift segments

How to Clock in and Out

There are 3 ways to clock in and out of TCP from any device within the office (Note that we have IP addresses and Geofencing set up)

1. From Prism- All employees can access Time Clock Plus from your prism portal log in, you will see Time Entry on the left menu, this takes you to a window to clock in /out.

2. From the appropriate direct link below, <u>also on the employee resource page</u>. Employees need a User ID which is their employee number. Managers can pull IDs from Prism for their employees. Employees will also need to use the last 4 digits of SSN as the password.

FG: <u>https://306519.tcplusondemand.com/app/webclock/#/EmployeeLogOn/112-8164/8164</u> FF: https://306520.tcplusondemand.com/app/webclock/#/EmployeeLogOn/112-8166/8166

3. Using the app, see instructions below, <u>download from the Apple or Play Store</u> - TimeClock Plus v7 MobileClock app (note FF employees have other configurations)

After downloading, it will need to be configured with these settings:

First Pacific Group Scheme: https Host: <u>306519.tcplusondemand.com</u> Port: 443 Namespace: 112-8164 Then the Employee ID from Prism PIN: last 4 of SSN

When clocking in on the App, you have to click **Clock In**, and then **Continue** on the next screen before you are actually clocked in, per screenshots below:



Items to Note

- A punch showing in green means this is a Missed Punch that has already been given Manager Approval. Without the approval, it should show in a bolder blue.
- The rounding can only be applied to manually added segments and clocked in/out segments, not edited. Manually added segments are added through the Individual Hours feature by the manager. Edited segments were originally recorded by the employee clocking in/out then a manager goes to Individual Hours to adjust the time in or out.
- Daily hours will not round correctly if an employee selects "Leave on Lunch" instead of "Clock Out"
- If someone is unable to clock in from their phone while in the geofence, it may be due to their wifi so they should try the following troubleshooting steps to see if they are able to log in after any:
- 1. Turn off wifi to disconnect, and then reconnect to wifi
- 2. Restart their phone
- 3. Have a manager or someone else try to clock in on their own phone at the same spot to see if it might be a phone or carrier-specific issue

Time Clocks Plus Overtime Notes

All OT log notes will be added as notes to the shift where any OT hours occurred in Time Clocks Plus. Basically, we just need you to add a note in TCP for any OT hours- so this would be for any day with over 8 hours or call-outs that may become OT at the end of the week. The same info is required in this note as you would have put in the OT log- so unit/project for each overage. On any shift, you can click "Edit" to add a note in the highlighted area shown below.

Edit Segment				?	Feedback
Individual is clocked Time sheet entry Edit actual time Missed in punch Missed out punch	in	Time in Time out Break type Job Code	10/14/2020 10/14/2020 << NONE >> 1 - Work	Segment 08:00 AM 05:00 PM	C C
Custom	Extra	Time Worked Note Location	ESTATES AT BR	ENTWOOD	Select Save

If you're looking in Group hours you can see the notes that are showing in blue have data and you can click on any to see/edit/delete the note.

CDO													_		
GRO	UPI	101	JRS) 22									Op	tions	Download
10/24/2020 Imite 10/30/2020 Imite Open Weeks Update Sort by: ID ↑ Start date Stop date Period															
Emp	ployee	Filter		Job	Code Filte	r	Tir	ne Worked Filter	Exception Filter Sho	w absences					
In order to	increas	e perfo	rmance	e and enhai	nce the fund	ctionali	ty of our so	ftware, Group Add Hours has be	en made part of a new feature N	lass Hours. To add or edit hours	for multiple employees and mult	iple segme	ents use Mass I	Hours.	
IVI	lanage		Ŀ	-xceptions	S	Kes	solve Perio	DO							
Showin	g 47 re	cords o	f 47	Selecter	d 0 records										
		*∕	€∕												
- 56	5 - Bill	y Hari	ris	+ Ad	dd										Regular 23.40
	<u>۽</u>	⊻∕	۴,	Notes	Edited	Ø	Break length	Time in	Actual time in	Time out	Actual time out	Hours	Shift total	Day total	Week total
	•				Y	E		Sat 10/24/2020 09:45 AM		Sat 10/24/2020 10:45 AM		1.00	1.00		
	•				Y	E		Sat 10/24/2020 12:15 PM		Sat 10/24/2020 12:30 PM		0.25	0.25	1.25	
	•					Г	60u	Mon 10/26/2020 08:00 AM	Mon 10/26/2020 07:54 AM	Mon 10/26/2020 12:01 PM		4.02			
0	•			Đ		L		Mon 10/26/2020 01:01 PM	Mon 10/26/2020 12:56 PM	Mon 10/26/2020 05:00 PM	Mon 10/26/2020 04:58 PM	3.98	8.00	8.00	
	•					-	60u	Tue 10/27/2020 08:00 AM	Tue 10/27/2020 07:57 AM	Tue 10/27/2020 12:03 PM		4.05			
	•				v			Tue 10/27/2020 01:02 BM		Tue 10/37/2020 05:15 PM		4.20	0.25	0.25	

RingCentral App - Meetings

Follow these step-by-step instructions to join a meeting via the RingCentral app.

Download the RingCentral App



- Log into your extension.
- Click Join in the top left



RingCentral App - Meetings

• Enter Meeting ID then click Join.

• Once joined, select "Dial In" to connect audio.



Join

:

Join a meeting

MEETING ID OR MEETING LINK

PERSONAL MEETING ID

JOIN OPTION Don't connect to audio

RingCentral App - Meetings

• Once in the meeting click the red "Start Video" icon on the bottom task bar to enable your camera.



Resident Referral Credit

01	Referrals are to be paid after the new resident who moved in has been living in their home for 30 days.
02	The applicant MUST tell the leasing specialist on the initial call who referred them in order for the resident to get credit.
03	The referral credit is to be applied as a onetime concession to the referring resident's account after these 30 days.
04	This slip as well as CRM memo notes should be added to both accounts – please scan and save to resident file as an attachment.

Resident Referral Credit

New Resident Name	:
Apartment	:
Move-in Date	:
Lease Term	:
Referring Resident	:
Referring Unit	:
Credit Entered by	:
Amount	:

*Referrals are to be paid after the new resident who moved in has been living in their home for 30 days. The referral credit is to be applied as a onetime concession to the referring resident's account after these 30 days. This slip as well as yard memo notes should be added to both accounts.

- Our number one goal is to keep our residents and it is up to us to make that happen!
- O Make sure to understand and follow this plan
- Make it a priority to learn resident names and pet names
- Always greet residents
- Remember, we are, "At Your Service."

Confirm utilities are in the resident's name, review all lease documents/key points/payment info Move in day Team member walks apartment prior to move-in whith Sparkle Bucket and leaves the gift with move-in bookdet; Take move-in photos for their file. Confirm payment in-full made with certified funds Escort resident to their new home and indicate on map all community amenities Hold mail keys with full move-in checklis returned Move-in follow up email (Auto Sent) 1 day after mi VP Letter trailed 7 days after mi Adays after mi Maintenance Supervisor knocks on door to go over procedures Follow-up call on happiness with new home 14 days after mi Maintenance Supervisor knocks on door to go over procedures Follow-up call on happiness with new home 14 days after mi Maintenance Supervisor knocks on door to go over procedures Follow-up Maintenance door happines 9 days after mi Maintenance Supervisor knocks on door to go over procedures Follow-up to deliver, "Have a Great Day,"door hanger 90 days after mi Follow-up call/ SMS to check-in During lease term 0 Orgoing communication, quarterly newsletter and resident events 120 days prior to renewal Blank Service Requests rent to resident 120 by Famil Auto-Sent 90 days apprior to renewal 14 days apprior to renewal 15 days apprior to renewal 16 days apprior to renewal 17 days apprior to renewal 18 days apprior to renewal 18 days apprior to renewal 19 days apprior to renewal 10 days apprior to renewal 11 days apprior to renewal 11 days apprior to renewal 12 days apprior to renewal 13 days apprior to renewal 14 days apprior to renewal 15 days apprior to renewal 16 days apprior to renewal 17 days apprior to renewal 18 days apprior to renewal 19 days apprior to renewal 19 days apprior to renewal 10 days apprior to renewal 10 days apprior to renewal 11 days apprior to renewal 12 days apprior to renewal 13 days apprior to renewal 14 day oncice required for 52. Sa 5 16 renewal or NTV is not signed a req		Prior to move in
Move in day Team member walks apartment prior to move-in with Sparkle Bucket and leaves the gift with move-in bolcts for their file. Confirm payment in-full made with certified funds Escort resident to their new home and indicate on map all community amenities Hidd malk keys until move-in checklist returned Move-in follow up email (Auto Sent) 1 day after mi Pletter Emailed 7 days after mi Follow up call on happiness with new home 14 days after mi Maintenance Supervisor Knocks on door to go over procedures Follow-up very emailed (Auto Sent) Move-in follow-up walket (Auto Sent) Move-in follow-up walket (Auto Sent) Move-in Subvervisor Knocks on door to go over procedures Follow-up to deluer, "Kave a Great Day," door hanger 90 days after mi Follow-up call/ SMS to check in During lease term Ongoing communication, quarterly newsiteter and resident events 120 days prior to renewal Blank Service Request sent to resident 120 Day Email Auto-Sent 90 days prior to renewal Issue 90 days Renewal Proposal offer itert to be included on invitation with a small treat • Issue 90 days prior to renewal		Confirm utilities are in the resident's name, review all lease documents/key points/payment info
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Thank You Email/ Survey Auto Sent Carpet Voucher inside card signed by the team		After renewal
		Thank You Email/ Survey Auto Sent Carpet Voucher inside card signed by the team
After review		After review

PRIOR TO MOVE IN

Confirm utilities are in the resident's name, review all lease documents/key points/payment info

MOVE IN DAY

- Team member walks apartment prior to move in with sparkle bucket
 - Leave move-in gift & move-in booklet
 - Take move-in photos and upload to resident's attachments in CRM
- Confirm payment in-full made with certified funds
- Escort resident to their new home and indicate on map all community amenities
- Hold mail keys until move-in checklist returned
- Move-in follow up email (Auto Sent





1 DAY AFTER MI

VP Letter Emailed

7 DAYS AFTER MI

Follow-up call on happiness with new home

14 DAYS AFTER MI

- Maintenance Supervisor knocks on door to go over procedures
- Follow-up Maintenance door hanger
- Move-In Survey emailed (Auto Sent)

60 DAYS AFTER MI

• Follow-up to deliver, "Have a Great Day," door hanger

90 DAYS AFTER MI

• Follow-up call / SMS to check-in

DURING LEASE TERM

• Ongoing communication, quarterly newsletter and resident events

FIRST PACIFIC

May your day be filled with smiles!





120 DAYS PRIOR TO RENEWAL

- Blank Service Request sent to resident
- 120 Day Email Auto-Sent

90 DAYS PRIOR TO RENEWAL

- Issue 90-day Renewal Proposal offer letter to be included on invitation with a small treat
- Email and post the offer to their door
- Send calendar invite for 30 days after notice served as offers will expire
 - After 30 days anyone that has not renewed is given an additional 7 days to sign or renewal or their proposal will be deleted and a new proposal at a great rate will be issued

Timbercreek East	You or No
Nsikan Ubon FRIDAY BASSEY 1835 SE Timbercreek Court Blue Springs, MO 64014	Louridan -
Dear Nsikan Ubon, FRIDAY BASSEY and all other occupants	
We are pleased to invite you to join us for another year of residency at Timbercreek East Townhomes! It is wonderful residents like you that make us the 'one-of-a-kind' community that it is, and we want to make sure we are doing everything we can to ensure you are happy in your home! We know that your home is an important place, and we are happy you have chosen Timbercreek East Townhomes as the place where you plant your feet each day and hope you continue to do so in the future.	
We show that your current lease is due to expire on 06/07/2021 and we have made it easier than ever for you to renew your lease by offering you a competitive lease rate with flexible options as well as incentives just for signing for another term. We have also made the signing process as convenient as ever by sending you your options to review and sign online.	
3 Month Renewal 12 Month Renewal Rent \$1,225,00 Rent \$1,225,00 Trash \$25,00 Trash \$25,00 Trash \$25,00 Trash \$25,00 Short Term Lease Premium \$75,00 Short Term Lease \$50,00	TITS A REAL TREAT Low grow another Hyper a register
If you do not wish to renew your lease and you plan to move, you must sign a 60-day written notice to vacate form via your resident portal. This form must be signed by all lease holders as well as by a member of the office team to be valid. If we do not receive your written notice to vacate on or before April 8, 2021, or if you fail to renew by the expiration date, you will automatically be put on a month-to-month basis at a rental rate of \$1225.00 with a month-to-month fee of \$150.00 for a total of \$1,375.00 plus utilities and other monthly fees at the market rent.	
Prior to deciding to vacate, please share any concerns you may have with the office and we may be able to accommodate your needs.	
Again, we thank you for your continued residency and hope you continue to call Timbercreek East Townhomes home. Don't hesitate to contact us with any questions. We hope to receive your RSVP today!	
Warmest Regards,	VOLA REMEWAL IS
Timbercreek East Townhomes Management	EAT'S INSCISSI VOLIT ATTACKAL OF TOWN
Always at Your Service!	
Timbercreek East Townhomes 1860 SE Timbercreek Ct. Blue Springs, MO 64014	
(833) 282-1985 www.timbercreekeast.com	







80 DAYS PRIOR TO RENEWAL

Contact anyone that has not signed a renewal or given notice

70 DAYS PRIOR TO RENEWAL

Send 15 Day offer Expiring Letter

60 DAYS PRIOR TO RENEWAL

- if moving, NTV is now required
 - Contact anyone that has not renewed or given notice to remind them of 60- day notice
 - 30 day notice required for SC & SS
- If renewal or NTV is not signed, then email the list of whose proposals need to be deleted and regenerated

50 DAYS PRIOR TO RENEWAL

Send new offer letter

45 DAYS PRIOR TO RENEWAL

45-Day reminder email will auto-send to the resident encouraging them to renew if they haven't already done so

35 DAYS PRIOR TO RENEWAL

Follow up call to resident to remind them of the Month-to-Month fees and notice requirements & encourage them to renew or determine any concerns they have

30 DAYS PRIOR TO RENEWAL

Send MTM Reminder

20 DAYS PRIOR TO RENEWAL

Follow up call to remind them to renew to avoid month-to-month fees.

15 DAYS PRIOR TO RENEWAL

Contact Resident to remind them they will be going MTM

10 DAYS PRIOR TO RENEWAL

Follow up call & visit the resident's home between 5 & 6pm if they have not signed to remind them to renew ASAP to avoid month-to-month fees.

IT'S TIME TO RENEW

Your lease will be expiring soon. We wanted to let you know how much we have appreciated having you as part of our community!

At your convenience, please review your renewal options on your Resident Portal and select the option that suits you best!

AFTER RENEWAL

- After Renewal Thank You Email/Survey Auto Sent
- Carpet Voucher inside card signed by the team



- Upon renewal each home is given a carpet cleaning coupon good for one free carpet cleaning within 60 days of receipt
- The resident then contacts our carpet cleaning vendor directly to schedule the cleaning themselves
- At the time the cleaning is done the resident should present the voucher to the vendor for payment or leave in plain site in the apartment for the vendor if they aren't home
- The vendor should then take the voucher and staple it to the invoice as they submit it for payment
- Once the invoice is received, the voucher is scanned and attached to the resident profile
- Check 'No' on the chargeback stamp and note "Renewal" on the notes line

CET YOUR CARPETS		NAME
CLEANED - ON US!		APARTMENT
	RECEIVED	EXPIRATION
THANK YOU FOR RENEWING!		AUTHORIZED BY
FIRST		SERVICED BY
PACIFIC GROUP, INC.	OFFER VALID FOR 60 DAYS AFTEF By a first pacific r	RECIEPT. VOUCHER MUST BE COMPLETED EPRESENTATIVE AT THE TIME OF RENEWAL

AFTER APARTMENT RATING REVIEW

Send a personal thank you card with a gift card once approved by the regional manager.



Renewal Report

The renewal report should be used for generating monthly renewal tracking logs and will also serve as the renewal commission log once all renewals are finalized.

To generate the report in Voyager from the left-hand menu:

Residential -> Workflow -> Lease Expiration Report

Enter Filters: Example - Renewal Log for May 2020 Lease Expirations

- Property
- Lease From Date = First Day of the Month (05/01/2020)
- Lease To Date = Last Day of the Month (05/31/2020)
- Output Type = Excel

Lease Renewal					
Property/List	hc	Output Type	Excel 🔻	Attach Reports	
Lease From Date	05/01/2020	Merge Reports		Email Reports	
Lease To Date	05/31/2020	Show Grid			
	,			Show on Portal	
		<u>G</u> enerate	Clear	<u>H</u> elp	

Click View Report

Lease Renewal					
Property/List	hc	Output Type	Excel 🔻	Attach Reports	
Lease From Date	05/01/2020	Merge Reports		Email Reports	
Lease To Date	05/31/2020	Show Grid			
				Show on Portal	
		<u>G</u> enerate	C <u>l</u> ear <u>H</u> elp		
link Report 15.00 few Report					

Open the attachment and save as: Property Code Renewal Log Date (*HC Renewal Log 11-26-19*) and save to the server in the corresponding month folder.

D:\Data\SITE SERVER\SC SITE\Lease Documents\HC\Renewals_Renewal Log\2020\05-2020


Renewal Report

• The Renewal Report will pull resident current info

Hidden Creek Apartments											
					Current						
		Unit	Market	Current	Concession/	Current	Current	Current	Current		Lease
Name	Unit #	Type	Rent	Rent	PEP	Utility	Trash	Pet Rent	Rentable Item	Sqft	Expiration
Dustin Evans	050	hc11	\$2,090.00	\$2,075.00	\$0.00	\$70.00	\$0.00	\$0.00	\$45.00	525	5/18/2020
David Harris	067	hcL1	\$1,950.00	\$1,950.00	\$0.00	\$70.00	\$0.00	\$0.00	\$90.00	450	5/25/2020
Michael Long	077	hcL1	\$1,950.00	\$1,758.00	\$0.00	\$70.00	\$0.00	\$0.00	\$90.00	450	5/4/2020
Devin Hickey	078	hcL1	\$2,000.00	\$1,803.00	\$0.00	\$70.00	\$0.00	\$0.00	\$90.00	450	5/4/2020
Natalie Kwan	084	hcL1	\$1,950.00	\$1,925.00	\$0.00	\$70.00	\$0.00	\$0.00	\$90.00	450	5/25/2020
Bruce Noland	100	hcL1	\$2,050.00	\$2,000.00	\$0.00	\$70.00	\$0.00	\$0.00	\$45.00	450	5/4/2020
Patrick Del Carlo	103	hcL1	\$1,950.00	\$1,925.00	\$0.00	\$70.00	\$0.00	\$0.00	\$45.00	450	5/11/2020
Lucia Gonzalez-Sepulveda	105	hcL1	\$1,950.00	\$1,900.00	\$0.00	\$70.00	\$0.00	\$50.00	\$45.00	450	5/4/2020
Katie Shiver	111	hc21	\$2,625.00	\$2,600.00	\$0.00	\$80.00	\$0.00	\$50.00	\$90.00	686	5/11/2020
Lijun Jiang	112	hc11	\$2,090.00	\$2,090.00	\$0.00	\$70.00	\$0.00	\$0.00	\$45.00	525	5/31/2020

Renewal rates will be set per your current policy. Once new rates are set proposals need to be created for each in order for the letters to generate properly. Follow current policy for creating proposals. Once created and approved the team will initial the cells in each column as the tracking items are completed.

							Date	Lease Expires:									
																After	After
								120 Day	90 Day	<u>60 Day</u>	45 Day	<u>35 Day</u>	15 Day			Renewal	Review
			New	New			New	Service	Invitiation w/	Renewal	Reminder	Reminder	Visit Resident			Thank You	Thank Yo
Lease			Monthly	Monthly	Pet	Utility	Lease	Request	Offer Letter	Door	Letter	MTM Letter	Avoid MTM	Emailed	Lease	Letter &	& Fuel
Expiration	Difference	Increase	Concession	Rent	Rent	Fee	End Date	Letter Sent	& Goodie	Hanger	Sent	Sent	Fees	Lease	Signed	Survey	Card
5/18/2020	-\$15	\$25	\$0	\$2,100	\$0	\$70	05/08/21	NB	NB	NB							
5/25/2020	\$0	\$50	\$0	\$2,000	\$0	\$70	05/22/21	NB	NB	NB							
5/4/2020	-\$192	\$41	\$0	\$1,799	\$50	\$70	05/08/21	NB	NB	NB							
5/4/2020	-\$197	\$22	\$0	\$1,825	\$0	\$70	05/08/21	NB	NB	NB							
5/25/2020	-\$25	\$25	\$0	\$1,950	\$0	\$70	05/22/21	NB	NB	NB							
5/4/2020	-\$50	\$25	\$0	\$2,025	\$50	\$80	05/08/21	NB	NB	NB							
5/11/2020	-\$25	\$20	\$0	\$1,945	\$50	\$80	05/15/21	NB	NB	NB							
5/4/2020	-\$50	\$25	\$0	\$1,925	\$100	\$70	05/08/21	NB	NB	NB							
5/11/2020	-\$25	\$40	\$0	\$2,640	\$0	\$70	05/15/21	NB	NB	NB							
5/31/2020	\$0	\$25	\$0	\$2,115	\$0	\$70	05/29/21	NB	NB	NB							

Once the all renewals are finalized you will add the commission for the renewal to the commission column and total all commissions at the bottom and note the split per team member.

_												
Date	Lease Expires:	May-20										
									After	After		
	120 Day	<u>90 Day</u>	<u>60 Day</u>	<u>45 Day</u>	<u>35 Day</u>	<u>15 Day</u>			Renewal	Review		
New	Service	Invitiation w/	Renewal	Reminder	Reminder	Visit Resident			Thank You	Thank You		Commission
Lease	Request	Offer Letter	Door	Letter	MTM Letter	Avoid MTM	Emailed	Lease	Letter &	& Fuel	Notes	Amount
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Once finished save as "Property Code Renewal Commissions Date" (HC Renewal Commissions 11-26-19) and save to commissions folder on the server.



Missouri

Website: http://www.mshp.dps.mo. gov/MSHPWeb/PatrolDivisi ons/CRID/SOR/SORPage.ht ml Click I agree:

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Marina an Page	accounte, however, the Patrick markes no representation, express or implied, that the information contained on the web site is accounte.

Click search map offenders:



On the interactive map search on the right side input the property address, select the distance for the desired search, and click find address:



A map and list will populate with the locations and names of sex offenders living and working within the searched radius:

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Click the buttons to navigate, save, or print the map. *New Mexico* Website: http://sheriffalerts.com/cap_offic e_disclaimer.php?office=55290&f wd=aHR0cDovL2NvbW11 bml0eW5vdGImaWNhdGIvbi5jb2 0vY2FwX21haW4ucGhwP29mZml jZT01NTI5MA== Check I agree to the above terms & conditions and click continue:

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Click search offenders in your area:





On the in your area tab input the property address and click search:



A map and list will populate with the locations and names of sex offenders living and working within a one mile radius. Use the radius drop down menu to charge the area searched:



Michigan

Website:

http://www.mipsor.state.mi.us/ Enter the code shown where specified at the bottom of the page and click I have read and agree to the terms:



Click search within 1 mile radius:



Input the property address and click submit:



A map will populate with the locations of sex offenders living within a one mile radius:





Hover over the blue and red address icons and a list of sex offenders at that address will appear:



Ohio

Website: <u>http://sheriffalerts.com/cap_main.php?off</u> <u>ice=55149</u> Click search for offenders in your area:



On the in your area tab input the property address, check all boxes for offender address type, and click search:

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A map and list will populate with the locations and names of sex offenders living and working within a half mile radius.

Use the radius drop down menu to charge the area searched:





Sorting In Excel

Many reports used daily or weekly are pulled from Yardi and can be exported to excel. The information in these reposts can then be manipulated to make the contents more user friendly. The easiest way to manipulate the information into a more visually appealing way is to sort it. Sorting is an easy way to make the data appear by which ever grouping you need. Such as by last name, unit number, charge code, date, etc. To sort you simply:

- 1. Open in Excel
- 2. Highlight all and click MERGE & CENTER to unmerge all cells

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3. Click on row 8 (the row above all info) then click the Data tab, and then click Filter

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4. Click on the arrow at the top of the column you want to sort by (so column C to sort by unit) and chose sort A-Z



Sending an EBlast

HOW-TO SEND AN EBLAST TO YOUR RESIDENTS

1. Log-In to RentCafe

2. Choose Your Property

Site Manager

Onelp • | 1 My Profile | E-Lingout

Company Properties Leading	Heaters	elemans Aegusts -					RemCale REACE
First Pacific Group > Property Search							B Select Property -
COMPANY CONFIGURATION	×	Property Search				+ 100	menty Braght Post
o Settings							
O Corporate Step	1	Below you will see a lat of your properties, ch	k on the property runne to edit your ex	dating properties or on the	Add Proper	ty link above to add a re	w property.
A Control Management						*	
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A Big Management	10	Collar Ridge Agartments & Townhomes	3100 Qual Dreek Dr	Independence	MO :	(New)	Tex .

3. Navigate to "Marketing" in the Left Menu

PR	OPERTY CONFIGURATION	x	Property Inform	ation						
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Sending an EBlast

HOW-TO SEND AN EBLAST TO YOUR RESIDENTS

4. Click "Email" in the Drop-Down Menu

4	Marketing -
	Instagram Gallery
	Classifieds
	Nudge Marketing
	Lead Attribution & DNI
	Resident Referrals
	Social Media
	Resident Referral Reporting
	Analytics Tracking
	Email
	SMS Management

5. Click "Send Email"

Campaign	Subject	Audience	By	Туре	Schedule Type	Status	Actions
MAY RESIDENT GIVEAWAY	MAY RESIDENT GIVEAWAR		Dixie Malick on 5/3/2022	Resident	One-Time 5/3/2022 @11:18 AM CDT	See	
Happy Easter!	Happy Easter!		Disie Malick on 4/15/2022	Resident	One-Time 4/17/2022 #99:00 AMI CDT	-	



Sending an EBlast HOW-TO SEND AN EBLAST TO YOUR RESIDENTS

6. Create a New Audience, Then Click "Continue"

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Moved in today	1/21/2022	Resident	399	5/6/2022 @9:00 AM CD1	Leave Status		Select Edit & Ser	In
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FIRST PACIFIC GROUP, INC.

Sending an EBlast HOW-TO SEND AN EBLAST TO YOUR RESIDENTS

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Audience Name	Dates Created	Recipient Type	Recipients 0	Audience Last Modified	Additional Conditions	Active Campoigns	Actions	
Moved in today	1/21/2022	Resident	399	5/6/2022 @9:00 AM CD1	Leave Status		Select Edit & Ser	In
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FIRST PACIFIC GROUP, INC.

Sending an EBlast

HOW-TO SEND AN EBLAST TO YOUR RESIDENTS

8. Create Your Email



9. Send Now, Save Draft, or Schedule for Later





Check Scan Procedures

Scan Check Deposits into Chase using the new Panini ML: Deal Check Scanner

Log in to your Chase Account Click "Collect & Deposit"

\equiv CHASE () for BUSINESS*								
Accounts	Pay & transfer	Collect & deposit	Investments	Account management	Security & privacy			
Showing	All accounts	~			0 🖶			

On the "Deposit Checks" tab, enter your Deposit to account, Deposit total, click Next

\equiv CHASE () for BUSINES	SS"			
Accounts Pay &	transfer Collect	& deposit Invest	ments Account manager	ment Security & privacy	,
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	Dep	posit total (\$USD) 😗	\$		
			Or use our Check calcul	ator	
			Don't insert checks yet. Choose "N	lext" to continue.	
			Cancel	Next	



Check Scan Procedures

Scan check. Face side up, with routing/account numbers on the right side.

Confirm all numbers are correct, and click Next

≡ CHA	SE 🖸 for BUS	SINESS'				م	ĘΨ	Open an accou	ant Sign out
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Deposit c	hecks								
These checks ar	re ready for deposit o	r need your attention. To	make any updates or to r	emove a check, choose "Shi	ow/Change," "Correct error"	or "Remove check."			
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Click Send deposit

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We received you	ur deposit. You can print a re	ceipt for your records.				4
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/29/2024		FIRST	Г PACIFIC			
		FIRST PA	CIFIC GROUP, INC.			

Google Drive Folders

-Home shows you files that Drive thinks you'll want to use. This is based on various criteria like when you edit them, open them, uploaded them, when they were shared with you, or documents attached to upcoming Calendar events. You can generally ignore this folder.

-My Drive contains files and folders that you created outside of the Shared drive and you control access to. You are able to share access and permissions to these files and only the files you share from your My Drive will be accessible to others. To share files located in My Drive, right click on the file...

-Shared Drive is the primary folder in Google Drive that First Pacific uses to store and collaborate on files. Unlike in My Drive, Shared Drive and its contents are managed by the company, though employees have access to their property's files. Permission for these files include view only or write permissions. Within a single folder you may only have view access for a top level folder but then have write access as you drill down the folder hierarchy. Please notify your manager if you're unable to access a file you believe you should have access to. Once you are a member of a Shared Drive, the drive will appear below your "My Drive" and above "Shared with me" in your Google Drive in the sidebar.

-Shared with me is very different from Shared Drive. Shared with me generally are files that you only have access to because an individual shared them with you. The owner of those files has full control and can revoke access at any point. When someone shares a file from their "My Drive", it goes into the "Shared with me" section for whoever they are sharing with. You can create a shortcut of a file in Shared with me and move the shortcut to your My Drive or just leave it in Shared with me. Files in your Shared Drive will NOT also show up Shared with me.



Google Drive File Collaboration / Find Files



Google Drive File Collaboration

All file changes are automatically saved in real time so no need to save as you go.
Permissions for a file can be edit, comment, or view so you can do certain things based on your permission.

•With Google Drive, version control isn't a problem. Generally, no more need for saving multiple versions of a file, except when doing so for specific reasons.

•Collaborating on a file now is a breeze. All of your coworkers can work on the same document, at the same time. You can always see in the upper right corner if someone else is working on the file.

Finding Files

•Google is known for its search engine so the easiest way to find a file is just to type the name of the file in the search bar, or any word in the name. If you want a more refined search, click the Advanced Search icon on the right side of the search

bar. This lets you search within a specific folder or using other specific criteria.Or, you can search manually by clicking through the folder hierarchy. You can see the folder structure in the left panel and in the main body.

•You can see the full breadcrumb list on the left by clicking the down arrows or double clicking the folder name to expand/collapse each folder. Note that individual files never show on the left panel, only in the main body.

•The breadcrumb list at the top of the main body only shows 2 or 3 folders so you need to click the horizontal ellipses to see the full path.

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Click folder in main section to drill down. Or, click the down	By crite Shared drives	Policies-Training-Manuals	May 30, 2019	see the "bread crumb" location of a file. In this case, it's in Site SC,	Activity	Marketing	Last mo 🔻	File size	1 ° 0
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	_Policies-Trainin	Lease Documents	Jul 29, 2016		Shared drives Site AR	Hidden Creek Logo.png	Jan 29, 2021	41 KB	
	Office Equipm Training Mater	Legal	May 4, 2016		• 🛄 Site SC • 🛅 _Policies-Trainin				
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	Lease Documents Legal	Office Forms	Mar 2, 2024		Lease Documents				
	Maintenance Marketing	Photos	Dec 30, 2015						
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	Vendors Weekly Reports	Weekly Reports	Oct 19, 2015						

Organizing Shared Drive Files for easier access

Organizing Shared Drive files for easier access

•You cannot move a file or folder out of Shared Drive into My Drive so to put something into another location outside of Shared Drive you need to create a shortcut to the original file. Right click on a file, select organize, select add shortcut, then select where you want the shortcut to go. Importantly, if you delete a shortcut it does NOT delete the original file. Also, you'll get a message that moving a file from one folder to another will lose the original permissioning and take on the permissioning of the destination folder.

•Starred: Helpful for starring favorite files/folders for easier access. You can't create your own folder structure like in My Drive so this is just a flat list of favorites. This simply saves a link to the original file itself. To remove an item from your starred list, right click the item, click organize, then click remove from starred. This only removes it from your starred list, it doesn't delete the original file.

•My Drive: Helpful for creating a file hierarchy for documents that are not shared with the team. For example, storing files/folders from the Shared Drive that you want easier access to. Remember that only shortcuts to Shared Drive files/folders can be placed here, not the original files/folders themselves.

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•Download report from Yardi and save into Download folder on computer (or any location you choose to put it).

•If you want to save in the Shared Folder in Google Drive, navigate to the destination folder in Google Drive. In upper left corner click the "+ New" button, select "file upload", navigate to wherever you saved the file and double click the file.

•If you only want to open the file and NOT save it in the Shared Folder, follow the same steps as above but navigate/upload to your My Drive folder instead of the Shared Drive folder as the destination.

Create a New Version (Copy) of a Google Document/Spreadsheet

•Right click on the file you want to save as a new version. Or click on the ellipses to the right of the file name. Select, "Make a copy". Rename the copied file.

•Note: Make sure to create the new copy BEFORE you make any changes to the file since all changes are automatically saved in real time.

Share a Google Drive Document

•Right click the document, or click the vertical ellipses next to the document.

Click "Share"

•Type the email of the person you're sharing with. Assign viewer/commenter/editor permissions.

•Click Done.

•Note that documents in the Shared Drives can't be shared outside of First Pacific.



Email a Google Drive Document

•Create a new email in Gmail

At the bottom of the email click the icon ▲

•Select whether you want to send as a link or an attachment in the bottom

right corner of the page Insert as

Drive link

Attachment

•It's recommended to first share/permission the document with the recipient in Google Drive before sending a Google Drive link.

Manage PDF's in Google Drive

You must have an Adobe Acrobat license before being able to manage/edit PDF's in Google Drive. Contact your manager if you need a license.
Once you have an Adobe Acrobat license, you need to connect your license to your Google Drive account by following the steps below:

- Open Google Drive and click My Drive (the one right beneath the search bar)
- Click More
- Click Connect more apps
- Click Search apps and type Adobe Acrobat
- Click Adobe Acrobat and then Install
- Click Continue and sign in with your Google account
- Scroll down and click Continue
- Click OK
- You'll know it worked when you go to any pdf in Google Drive, right click on it, click "open with", and you should see Adobe Acrobat listed as one of the options.

Google Drive Tips/Tricks

•All documents/spreadsheets are collaborative, meaning multiple people can work on the same

document/spreadsheet at the same time.

•You can see if someone else is in the

document/spreadsheet by looking for a small thumbnail image in the upper right corner of the page.

•Remember to close documents when you're done working on them.

•Avoid having lots of documents/tabs open at the same time.

•If your internet speed seems slow and lagging, try running an internet speed test using this

link: https://fiber.google.com/speedtest/.

•If you are creating a new version of a document, make sure to "create a copy" before you make any changes to the document.

•If you need assistance with anything related to Google Drive, please contact Adam at ameyers@fpacific.com.

Please notify Haley Cornish at hcornish@fpacific.com with any content changes or updates.

