

## Things to make instructions for:

- How to deposit checks to
- Creating new units
- How to code invoice numbers avid
- Tenants with multiple units
- Late Fees?
- Checks should always be entered by the office rep
- Collections - not wait till 12 and 180-306- weinstock move out 2/15 - dep used after move out
- Taking tenants to court - Jacob
- How to change unit in Managego
- How to keep track of
- How to program keyfobs
  - 55-27
  - 128
  - 1087
  - 180
  
- Reimbursements how to
- Job Descriptions/Evaluations (strategic-high level) email Dee
- Doesn't have to be finite,
  - What to do when someone asks you to do something that is not your job.
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- Building wide emails - not letter templates
- Funneling information.
- How to tell if your Building has passed Cat 1
- Repairs for HVAC

Is it worth it to have the super [snake the drains](#) instead of power roter?

Give Everyone the Management Booklet - Sam/Heshy/Gaby

### **Notes - How Do you do a security deposit form for buyouts**

Compliance

Holidays for Supers and Field Employees - Calendar

Sick Days

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## SCRIPT OF THE MONTH

### [Lease(0).Payments()]

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If you need to list all the payments a tenant has made on their lease in a letter, check out this is the script!

**[Lease(0).Payments()]** will return a list of all payments a tenant has made on their lease. Even better, if they have multiple leases, you can change the index from "0" to "1" to select their second lease only.

## QUICK TIP

### Design Your Scoreboard

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Ever notice that light-blue banner along the Property window, Unit window, Tenant window, etc.? It's called the Scoreboard, and it displays key pieces of data, regardless of which tab you're viewing. Want to see different information on the banner? It's customizable! Just right-click on the Scoreboard and select **Scoreboard Designer**.

In the window that opens, you can add, remove, and rearrange fields so the Scoreboard matches your business. Once you're done, click **Save** and **Back to Form**.

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~~Importance of Reading carefully Emails~~ — next week

~~Left board~~ — next week

~~Reimbursements~~

~~Who does what?~~

~~Introductions to our Staff - Who are we?~~

~~Making credits for past month's~~

~~Refrigerator repairs~~

~~ManageGo Updates~~

~~Rent Manager Updates~~

~~Please close the QB accounts by Friday~~

~~**Appliance Repairs and Purchases**~~

~~**Service Issues Rent Manager**~~

~~**Move out process for Fulton**~~

~~**Insurance Policies every month the same**~~

~~Signable documents filter done~~

~~How to filter Signable Documents – Should we send an email to all tenants to sign up with done~~

Add to vendor - Hold Harmless

Add to Property - Wire Information - W-9

Avid-Adhoc

Add to units - Loftboard Buyout

COI-Commercial Tenants

COI Report - emails

Consolidate by vendor

Safety Mailings confirming orders

Annual bank reports

Airline Orders - Cheaper when bought together

Mortgages Statements - Save into box and send to avid.

How to print Payment Stubs <https://www.screencast.com/t/QFSJfOyLu5> or

<https://www.screencast.com/t/C7z0PB9Szi>

## ACCOUNTING

~~-Week of 10/25/20~~

~~Posting Mortgage Payments - week of 11/1/20~~

~~Management Fees - 11/01/20~~

~~Paying Mortgage statements from different banks-11/01/20~~

~~Violations - Paying them~~

~~Remove a credit from a bill in QB~~

~~How to create a Vendor in QB/Avid - Rent Manager~~

~~Recurring Bills~~

~~Avid - ask Emma to write~~

~~How to Update Insurance Information on RM~~

~~Fraud Protection Services~~

~~Detaching invoices from voided payments~~

~~Reconcile Lines of Credit~~

~~First of the month bills – done~~

~~Reconciling Deposits in ManageGo~~

## LEASING

~~Posting Free Months~~

~~Posting Security to pay rent - date~~

Buyouts

Leasing commercial

Once a month-check a report of all units that have expected move out dates and do a check-no missing move outs

Move in/Move Out walkthrough

Buildings/Which utilities are the tenant's responsibility?

Account Groups - how to make them

Buyout Check when a Tenant has a balance

Invoicing Tenants for Work orders

How to unallocate a transaction

Move Out Process add the Debt Logic

## **MAINTENANCE & COLLECTION**

**ManageGo now Syncs with Rent manager all the tickets.-10/25/20**

How to open a ticket in ManageGo

How to scan a check to a tenant that is past or future

How to add a subsidy

How to enter the warranty on an item (appliance etc)

When Purchasing something add ticket number to account

How to Program Keys

How to Check the Cameras

Subsidy Amount Changes

Checks above 6000 cannot be processed through Epay

How to import clickpay

Entering and Scanning 1st of the month checks -

**Deluxe EChecks—done**

## **GENERAL**

How to check other people's calendars

Google Contacts Shared

How to pay violations

How to Sort Mail

Why is not ok to take shortcuts in a process?

How to Extract a Zip File

Ordering Supplies

How to make a Money Order

How to Send a Certified Mail Envelope

How to create the company email signature and add the logo to the account

Create email filters

Create Email Signature

Adding tasks to your calendar

How to fix the unable to export error in rent manager—done