ONESITE® LEASING & RENTS TAX CREDITS

Property Management Quick Reference Guide

Enter a Prospect
- Click **Prospects** tab
- Click on **New**
- Complete relevant fields
- Click on **Result** *(if required)* and record what sort of prospect you have
- Click **Save**

Schedule a Follow Up
- View Prospect record
- Click **Schedule follow up**
- Select **Contact** or **Appointment**
- Complete relevant fields
- Click **Save**

Confirm Appointment
- View Prospect record
- Select **Follow Up** sub tab
- Click **No** in Confirmed column
- Complete relevant fields
- Click **Save**

Show Unit
- View Prospect record
- Click **Show unit**
- Complete relevant fields
- Click **Save**

Quick Qualify a Prospect
- View Prospect record
- Click **Quick qualify**
- Complete relevant fields
- Click **Test**
- Observe results

Waitlist Prospect
- View Prospect **or** Applicant record
- Complete relevant information for primary prospect/applicant
- Click **Waitlist - Conventional**
- Click **Next**
- Enter relevant rental history, employment, emergency contact, vehicle and pet information
- Click **Next**
- Complete waitlist options
- Click **Next**
- Define fee and deposit options
- Click **Next**
- Click **Finish**

Record a Lost Prospect
- View Prospect record
- Click **Record Activity**
- Enter **Date**
- Enter **Activity type**
- Select **Lost** as Result
- Select **Loss Reason**
- Click **Save**

Check Availability
- View Prospect record
- Click **Check availability**
- Click **Find** to locate unit
- Select Unit
- Click **Next**
- Select terms
- Click **Finish**

Complete the Application
- View Prospect record
- Click **Apply Now**
- Review information for accuracy
- Add additional members to household *if necessary*
- Answer **Yes** to "Are all household members listed above?"
- Click **Next**
- Click **Select Unit**
- Click **Find** to locate unit
- Select Unit
- Click **Next**
- Select terms
- Click **Finish**
- Click **Next**
- Review information
- Select **Reason for Leasing** and **Late Method**
- Click **Next**
- Review and/or Print **Application Summary**
- Click **Finish**

Add Household Members once an Applicant
- View Applicant record
- Click **New** in Contacts and Household information tab
- Enter relevant information
- Click **Save**
- Click the **Demographics** tab
- Enter relevant information
- Click **Save**
- Click on the **Financial Tab** and enter the relevant financial information

Screen an Applicant
- View Applicant record
- Click **Screen now**
- Select applicant(s) to screen
- Click **Screen**
- Complete primary applicant information
- Click **Next**
- Complete additional applicant information *if needed*
- Click **Next**
- Review application information
- If correct, enter password (if *not* correct, click **Back** and make corrections)
- Click **Submit**
- Review scorecard

Make Decision (from Screening Scorecard)
- Click **Make Decision**
- Select decision from drop down list;
- Click **OK**
- Print decision letter if needed
- Click **Close**

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Cancel/Deny Application
- View Applicants record
- Click Deny application or Cancel application
- Complete relevant fields
- Click **Save**

*NOTE: Use Deny Application **only** for persons who fail screening*

Lease a Different Unit
- View Applicant record
- Click **Change unit**
- Click on **Select unit**
- Verify needed by date
- Select the unit
- Click **Next**
- Review unit information
- Complete relevant information
- Click **Finish**
- Review unit information
- Click **Next**
- Select Additional Options
- Click **Next**
- Select Rentable Items
- Click **Next**
- Update Fees and Deposit page
- Click **Next**
- Review summary page
- Click **Finish**

NOTE: Be sure to complete a certification after this step

Complete an Interview
- View Applicant record
- Click **Interview**
- Complete household information
- Complete relevant fields
- Click **Next**
- Verify member information
- Complete relevant fields
- Click **Next**
- Complete member demographics
- Click **Next**
- Complete verification letters
- Click **Next**
- Complete all income questions
- Click **Next**
- Complete all assistance questions
- Click **Next**
- Complete all other information questions
- Click **Next**
- Print all verification letters for applicant to sign
- Click **Next**
- Complete all asset questions
- Click **Next**
- Complete all investment questions
- Click **Next**
- Complete all other information questions
- Click **Next**
- Complete all disposed assets questions
- Click **Next**
- Print all verification letters for applicant to sign
- Click **Next**
- Review summary
- Click **Print eligibility report**
- Click **Print**
- Click **Finish**

Add Applicant to Waitlist
- View **Applicants** tab
- Click **New**
- Enter relevant information
- Click **Save**
- Click **OK**

Verify Income, Assets and Rental Assistance Letter
- View Resident record
- Select **Letters and Notices** tab
- Locate letter to verify
- Click **Verify**
- Update information as needed
- Click **Save**
- Enter verified date
- Click **Save**

Verification Letter Processing Overview
- Status: **Generating** Action: **Check Status**
- Status: **Not Printed** Action: **Print**
- Status: **Printed** Action: **Mail**
- Status: **Mailed** Action: **Verify**
- Status: **Verified** Action: **View**

Certify a Household
- View Resident record
- Click **Financial** tab
- *To edit existing info*, click on **Income** or **Asset** tab
- Locate info and click **Edit**
- Update info as needed and click **Save**
- Enter info for verification letter and click **Save**
- Complete steps to mark verification letter **Verified**
- Click **Certification** tab
- Click **Certify**
- Select **Annual recertification**
- Click **Next**
- Review household information
- Click **Next**
- Select program
- Enter tenant rent
- Click Verify
- Address any violations
- Click **Finish** or **Finish and View Forms**
- Click **Approve** or **Approve and Close**
- Click Certification tab
- Locate TIC
- Click **More**
- Click **Complete**
- Enter signature dates

Change Applicant Move In Date
- View Applicant record
- Click **Change Move In Date**
- Enter move in date and lease end date
- Click **Save**

NOTE: Be sure to complete a certification after this step

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Payments and Deposits Quick Reference Guide

Post Scheduled Billing

- Click **Administration** tab
- On the left hand side under **Leasing and Rents**, click **Other**
- Click **Post Scheduled Billing**
- Click **Preview**
- Review report for accuracies
- Click **Post**
- Click **Post** again

Enter a Payment

- View Applicants **or** Resident record
- Click **Enter payment**
- Enter relevant information
- Click **Post**

Edit a Payment

- View Applicant **or** Resident record
- Click **Ledger** tab
- Locate payment to be edited
- On the far left, click **View** for payment to be edited
- Click **Edit**
- Complete relevant fields
- Click **Post**

Reverse a Payment

- View Applicant **or** Resident record
- Click **Ledger** tab
- Click View for payment to edit
- Click **Reverse**
- Enter relevant information
- Click **Post**

Post a Security Deposit

- View Resident record
- Click **Ledger** tab
- View **Deposits Ledger**
- Click **Enter payment**
- Complete relevant information
- Click **Post**

Change a Security Deposit Amount (for Resident)

- View Resident record
- Click **Ledger** tab
- View **Deposits Ledger**
- Click **Change required deposit** button
- Click **Add**
- Complete relevant fields
- Click **Post**
- Click **Close**

Quick Payment Posting

- Click **Administration** tab
- On the left hand side under **Leasing and Rents**, click **Frequent Accounting**
- Click **Quick Payment Posting**
- Complete relevant fields
- Click **Enter**

*NOTE: repeat until **all** payments have been entered*

- Click **Post**
- Click **Post** again

Posting Subsidy Payments

- Click **Administration** tab
- On the left hand side under **Leasing and Rents**, click **Frequent Accounting**
- Click **Quick Payment Posting**
- Change the transaction code to **PMTSUB**
- Change the **subledger** to **Subsidy**
- **Uncheck both boxes**
- Enter relevant information
- Click **Enter**

*NOTE: Repeat until **all** payments have been entered*

- Click **Post**
- Click **Post** again

Post Miscellaneous Income

- Click **Administration** tab
- On the left hand side under **Leasing and Rents**, click **Other**
- Click **Miscellaneous Income**
- Click **Show transactions** for desired account
- *Next to Transactions*, click **New** to enter *Charge* transaction
- Complete relevant information
- Click **Post**
- *Next to Transactions*, click **New** to enter *Payment* transaction
- Complete relevant information
- Click **Post**

Post a NSF

- View Resident record
- Click **Ledger** tab
- Locate returned check
- On the far left, click **View**
- Click **Return item (NSF)** button
- Enter info for NSF fee
- Click **Post**

Reverse a NSF

- View Resident record
- Click **Ledger** tab
- Locate NSF check (ctrl # 998)
- On the far left, click **View**
- Click **Reverse NSF**
- Complete relevant fields
- Click **Post**

Repay a NSF

- View Resident Record
- Click **Ledger** tab
- Click **Enter Payment**
- Enter amount of repayment
- Click **Post**

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Payments and Deposits Quick Reference Guide

Close Bank Deposit

- Click **Administration** tab
- On the left hand side under **Leasing and Rents**, click **Frequent Accounting**
- Click **Bank Deposits**
- Enter **Total for Deposit**
- Select **Bank Account for Deposit** (*if there is more than one*)
- Click **Next**
- Review posted payments
- Click **Next**
- Print **Bank Deposit Summary**
- Click **Next**
- Click **OK**
- Click **Post**
- Print Report *(optional)*
- Click **Close**

Final Account Statements

- Click **Residents** tab
- Sort list by **Pending Final Statement**
- Locate former resident
- Click **View**
- Click **Close Account**
- Update Mail to name and Forwarding Address
- Click **Next**
- Apply any additional charges, credits, payments, or interest that accrued
- Click **Next**
- Click on **Print Summary** button
- Click **Finish**

Apply a Payment/Charge After Closing Account

- View Resident record
- Click **Undo Close Account**
- Enter **reason** for undo
- Click **Undo**
- Click **Close Account**
- Repeat Steps from Final Account Statements above

Editing a Payment/Charge After Closing Account

- View Resident record
- Click **Edit Close Account**
- Locate transaction to Edit
- Click **View**
- Click **Edit** or **Reverse**
- *If Editing*, make changes and enter reason
- *If Reversing*, enter reason
- Click **OK**
- Click **Post**
- Decide to update ledger or not
- Enter reason for Edit
- Click **OK**
- Click **Final Account Statement**
- Click **Print** or **Email**
- Click **Close**

Bulk Post Late Charges

- Click **Administration** tab
- On the left hand side under **Leasing and Rents**, click **Frequent Accounting**
- Click **Post late charges**
- Review list
- Click **Post**
- Click **Post**

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Complete the Move In
- View Applicant record
- Click **Move In**
- Complete the required tasks
- Complete additional tasks *if necessary*
- Click **Move In**
- Click **Move In**
- Enter signed dates
- Click **Complete**

Undo a Move In
- View Resident record
- Click **Undo move in**
- Select reason
- Click **Undo**

Assign Items (Assignable Items)
- View Applicant **or** Resident record
- Click **Rentable/Assignable items**
- Click **Assign item**
- Select item to assign
- Complete relevant fields
- Click **Save**

Assign Rentable Items
- View Applicant **or** Resident record
- Click **Rentable/Assignable items**
- Click **Rentable Item**
- Select rentable item
- Complete relevant fields
- Click **Save**

Record an Activity
- View Prospect, Applicant, **or** Resident record
- Click **Record activity**
- Complete relevant fields
- Click **Save**

(NOTE: By selecting Delinquency Comments in Activity Type, comments will appear on Delinquent and Prepaid Report.)

Transfer Request (to move within the same building)
- View Resident record
- Click **Move Outs/Transfers**
- Click on **Transfer Request** link
- Click on **Select Unit**
- Use the **Check Availability** window to find and select the unit
- Click on **Next** and select any **Additional Options**
- Click on **Next** and select any **Rentable Items**
- Click on **Next** and fill out necessary information
- Click on Next and review and print the **Transfer Summary**
- Click on **Finish**

Complete a Transfer (to move within the same building)
- View Resident record
- Click on **Certifications** tab
- Click Certify
- Create and Approve the Unit Transfer cert
- Click **Move Outs/Transfers**
- Click **Transfer now**
- Click **Save**
- Enter date signed by resident and owner
- Click **Complete**

Give Notice to Vacate
- View Resident record
- Click **Move outs/Transfers**
- Click **Give Notice**
- Complete relevant information
- Click **Save**

Complete a Move Out
- View Residents record
- Click **Move outs/Transfers**
- Click **Move Out**
- Complete **Required Tasks**
- Click **Move out**

Print a Move Out Statement
- View Resident Record
- Click **Move Outs/Transfers**
- Click **Print Move Out Statement**
- Click **Print**
- Click **Close**

Undo a Move Out
- View Resident record
- Click **Undo move out**
- Enter reason for undo
- Click **Undo**

Final Account Statements
- Click on **Residents** tab
- Sort list by **Pending Final Statement**
- Locate former resident
- Click **View**
- Click **Close Account**
- Update Mail to name and Forwarding Address
- Click **Next**
- Apply any additional charges, credits, payments, or interest that accrued
- Click **Next**
- Click on **Print Summary** button
- Click **Finish**

Apply a Payment/Charge After Closing Account
- View Resident record
- Click **Undo Close Account**
- Enter **reason** for un-doing
- Click **Undo**
- Click **Close Account**
- Repeat Steps from Final Account Statements above

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Property Management Quick Reference Guide

Editing a Payment/Charge After Closing Account
- View Resident record
- Click **Edit Close Account**
- Locate transaction to Edit
- Click **View**
- Click **Edit** or **Reverse**
- *If Editing*, make changes and enter reason
- Click **OK**
- Click **Post**
- Decide to update ledger or not
- Enter reason for Edit
- Click **OK**
- Click **Final Account Statement**
- Click **Print** or **Email**
- Click **Close**

Generate/Print Renewal Notice
- View Resident record
- Click **Renewals**
- Click **Generate renewal offer**
- Complete relevant information
- Click **Save**
- Click **Renewals**
- Click **Print renewal offers**
- Click **Print**

Generate Bulk Renewals
- View **Administration** tab
- Under the **Leasing and Rents** section click **Other**
- Click **Bulk renewal offers and reminders**
- Complete relevant fields
- Click **Build list**

From the Offers column
- Click offer hyperlink
- Enter the offer(s)
- Click **Save** (repeat until all offers are generated)

To generate renewal letter
- Select **"Offer letter"** from action field
- Select floor plan
- Click **Build list**
- Select **Send email** and/or **Include guarantor** if needed
- Click **Submit**

Renew lease

NOTE: Do NOT finalize the certification until after the renew now process is complete
- View Resident record
- Click **Renew/Go MTM**
- Enter relevant information
- Click **Next**
- Review scheduled billing & deposit ledger
- Click **Next**
- Review renewal summary
- Click **Finish**

Remove Resident/Contact from Unit Record
- View Resident record
- Click **More** for contact
- Select **Make inactive**
- Enter relevant information
- Click **Close**