

## Property Management Workflow

**Who:** Clients handling routine processing in the Property Management module. Typical attendees include property managers, lease administrators, lease accountants, and data entry operators.

**Content:** One day of hands-on experience with basic processing tasks (like rent roll, cash receipts) and repetitive setup (like lease creation, amendment, and termination).

**Credit:** CPAs successfully completing this course will receive a CPE certificate. CIS Consulting Group is a CPE sponsor with the North Carolina State Board of CPA Examiners, PO Box 12827, Raleigh NC 27605

**Prerequisites:** A familiarity with Microsoft® Windows®. We encourage clients to familiarize themselves with the software prior to attending. Also, those needing information about implementation can take the Property Management Setup class.

**Class Rates:**

One Day: \$450 1st participant, \$400 each additional

**Registration:**

Please fax completed registration form to 704-394-0052 or register online at [www.cisinfo.com/classroom.htm](http://www.cisinfo.com/classroom.htm) for more information please call 704-393-0038 x1142

Course Outline

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**Property Management Overview**

- Application Interfaces
- Workflow Overview
- User Concepts (includes right-click menu, lease selection settings)

**Lease Management**

- Record Relationships (Property, Unit, Tenant, Lease)
- Start Lease (includes Activate Lease and Create Charges)
- Change Lease
- Amend Lease
- Renew Lease
- Expedite Lease Start-up

**Charges and Cash Receipts**

- Generate Rent Roll
- Post Entries
- Print Statements
- Enter Cash Receipts
- Late Charges

**Error Correction**

- Change Entries
- Void Entries
- Refund/Apply Credits
- Deposit Interest

**End of Lease Processes**

- Terminate Lease
- Reconcile Account
- Move Lease to History

**End of Month**

- Clear Paid Entries
- Period End
- Move Entries to History