

2016

The First 100 Days for Accounting / Customer Service

MANAGEMENT ONE LICENSED OPERATING SYSTEMS
KNOWLEDGE BASED MANUAL

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The First 100 Days for Accounting / Customer Service

0-30 days

In Process

Completed

Accounting

[100 Most Asked Questions at Management One Test](#)

[M1 software training 40 min](#)

[One Touch system](#)

[Read Training Manual](#)

[Watch all Accounting Videos](#)

[Learn operations algorithm 17,15,12,8](#)

[Learn ILR](#)

[Learn LMS](#)

[Learn RML](#)

[Take Management Agreement test](#)

[Take Rental Agreement test](#)

[Key Board training](#)

[Key board - update board as status' change](#)

Follow monthly calendar

[Daily deposit](#)

Run rent receipts monthly

Post rents

[Bulk posting of rents](#)

[Prep 3-day notices for late rents](#)

[Print and prep 3 days for Property Inspector](#)

[Send monthly account statements to owners](#)

Proof invoices with PI 20 minutes a week

[Pay Invoices weekly to vendors](#)

[Cut checks to owners, residents, vendors, etc.](#)

[Retains on accounts - update retains](#)

[Sweep - paying Management One weekly on commission owed](#)

[Utilities - turning on/off during vacancy](#)

Take bookkeeping/customer calls from residents, owners, etc.

[Reports - daily & weekly reports](#)

Make Keys on Key Machine

31-60 Days

In Process

Completed

Accounting

[Make address changes into system for owners, vendors, etc.](#)

[Back on Markets](#)

[Market comps - CRA for back on markets](#)

[Lawn service - adding/canceling temporary and permanent service](#)

Property kills - once rented, kill from rental list, etc.

[New properties - enter into the system](#)

[New leases/re-rents - enter new resident information into the system](#)

Notices of violations to residents from HOA's, etc.

Rent increase letters to owners - assist in making sure all are out on time

Rent increase letters to residents - confirm all updated into computer once in

[Security deposits - breakdowns to residents, disputes, collections](#)

[Collection of resident owes/late fees - weekly tracking, sending notices](#)

[Eviction Updates to owners' weekly](#)

Issue Emergency repairs if PI is not in the office

61-100 Days

In Process

Completed

Accounting

Pull files and videos (if not in m1 software) for PI on BOM

[Prep Security Deposit Disputes and then converse with PI](#)

Do a Security deposit disbursement

[Closeout of account - statements/releases to owners, residents](#)

[Accounting / Bookkeeping - Customer Service Test](#)

Retake any test to be at 90% or better