AST NEWS-LETTER

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Need assistance?
Contact ast@essex.com
or call 844-ESSEX-IT

Report Reminder: Resident Vehicle Info

We hear that some of you have had some difficulty locating resident info with the standard Yardi search functions. No worries! We've got the perfect custom report just for you—Reports>Resident>Resident Vehicle Info. With this report, you can pull a list of resident auto information. You can also use the report filters to search by unit, resident, garage, etc.

Need to find the owner of the car blocking your driveway? Enter the car license plate # in the license field.

You can also search by property maintained items such as garage space, carport space, permit #, etc.

Note—This report pulls from information entered in
the Review Resident>Data>Auto Info link.

Resident Auto Report

Property	xxx
Unit	
Tenant	
Auto Model	
License	CMEBLOCK
Garage	
Carport/Space	
Permit	

Data
Lease Charges
Roommates
...
Pet Info
Auto Info
Swap Tenant/Roommate

Report Reminder: Employee Residents

Employee resident specific reporting is available on the following reports:

⇒ Aged Receivable

⇒ Ledger Detail

⇒ Resident Directory

⇒ Lease Charges

⇒ Resident and Roommate Info Report.

Just answer "Yes" to Emp Units Only in the report filter to see info for employee residents only.

The employee designation pulls from the Review Resident screen Other Info tab Employee checkbox. This box should be marked for all Essex employees living at your property.

Essex - Ledger Detail

Property	xxx
Tenant	
Unit	
Trans Date Range	
Page per Tenant	Yes
Order By	Date Created
Emp Units Only?	Yes

Resident

			Property Info	
First Name	Rachel	MI		
Last Name	Resident		Resident ID	t0129249
Address	925 East Meadow Drive		Property	xxx

Save   New   Help

Lease Info | Deposit Info | Lease Charges | **Other Info**

Do Not Use		Do Not Use	
Notes			
Reason for move out	Financial Reasons / Rent Increase	Maint, Bill To	
		Employee Unit	☑

New—Lease Charge Access!

As requested, Lease Charge access has been granted to Community Managers across the portfolio. Here are some common uses of manual lease charge adjustments.

- To correct inaccurate amounts due to typos during a move in, renewal, etc.—Update the Amount field to the correct amount.
- To delete a duplication of a charge, often seen when the Save button is selected more than one time during the move in process—Delete the duplicated line item using the Delete button.
- To delete a duplication of a charge where a rentable item is listed twice, once as a regular charge and once as a charge assigned to the rentable item-Delete the duplicated line item using the Delete button. Be sure to delete the non assigned line item in this case!
- To update housing authority portions-Enter a To Date on the previous portions. Create new line items (Code, Amount, From Date) to indicate the new amounts.
- To remove a To Date entered inaccurately– Remove the text in the To Date field for that line item.
- To remove a line item that was a result of the Month-to-Month function where a resident signs a lease after the Month-to-Month function was processed-Use the Delete button to delete the line item to be overwritten by the renewal. Always process the Renewal first!
- To schedule in advance an unassigned rentable item Amount change or service charge, such as pet rent-Enter the To Date when the current Amount will end. Create a new line item for the new Amount with a From Date indicating when the new Amount is effective.

For those of you who like having all the small details...

- Code: charge code of the lease charge
- Amount: dollar amount to be billed each month
- From Date: date on which charge begins
- To Date: date on which charge ends*
- E-Pay Type: not in use at this time
- Max/Mo: not in use at this time
- Hold: not in use at this time*
- Rentable Item: rentable item type (auto populated)
- Item Code: rentable item code (auto populated)
- Split: not in use at this time
- Delete: deletes a line item*

* To Date – Except for concession charge codes, this field is usually left blank if the charge is for the duration of the lease. System functions, when processed, update this field automatically.

    * Concessions are typically offered for a predetermined time frame. In these cases, the "To Date" should be entered to ensure accurate billing once the concession has expired.

* Hold – A check in this box prevents a charge from being paid.

* Delete - Should only be used where a line item should be completely deleted from history, such as a duplicate move in charge at move in.

Not a Community Manager and need to make a change?

Remember the side menu Toolbox>Update Lease Charge Amount tool. Using the functions in this screen, Bookkeepers and Assistant Managers can increase any lease charge, decrease lease charges other than RENT and RECR, and decrease lease charges to RENT and RECR by less than $100. For other Lease Charge modifications, coordinate with your Community Manager to make necessary changes.

Resident EFT—CheckScan

With all of the advances in technology happening around us, it can be hard to keep track of what's what. EFT info and removal has seen some changes recently based on system improvements. It's worth noting that CheckScan EFT setup can still be removed at the property should it become necessary. Just click the Clear EFT Setup link from the Review Resident screen. This link removes only CheckScan EFT information. Portal EFT information is not affected by this link.

In cases where the existing EFT is in place at a property other than yours, the system will prevent you from proceeding. No worries! Just give AST a call. We're happy to help!
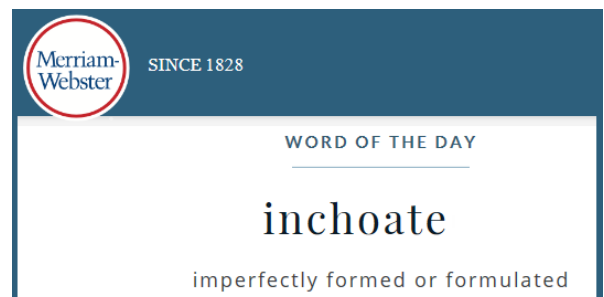

IMWTK (Inquiring Minds Want to Know)

Ever wonder about all of those acronyms floating around out there? You're not alone. Here are some that we see frequently.

⇒ EFT=Electronic Funds Transfer: the electronic transfer of money from one bank account to another, either within a single financial institution or across multiple institutions, through computer-based systems and without the direct intervention of bank staff.
⇒ AMA=Ask me anything. I promise to tell the whole truth, and nothing but the truth. Speaking of the truth, what movie character said "You can't handle the truth!"
⇒ ACH=Automated Clearing House: an electronic banking network often used for direct deposit and electronic bill payment.
⇒ ICYMI=In case you missed it. Like ICYMI, I sent that yesterday.
⇒ AST=Application Support Team (one of our favorites!)
⇒ DM=Direct Message. (or Divisional Manager in Essex terms!) DM's predecessor was PM, short for Private Message.
⇒ DST=Desktop Support Team (these guys are great!)
⇒ SMH=Shaking my head. Huh??
⇒ IR=Invoice Register. Essex PayScan language!
⇒ ELI5=Explain it like I'm 5. We all need a little extra explaining sometimes! ELI__ - Insert your age here!

"Successful and unsuccessful people do not vary greatly in their abilities. They vary in their desires to reach their potential."
--John Maxwell

Merriam-Webster SINCE 1828

WORD OF THE DAY

inchoate

imperfectly formed or formulated

Fun & Games Test   Your Knowledge

1. Which of the following are current members of Essex Senior Management?
A. Michael Dance, Michael Schall, Angela Kleiman
B. Deborah Jones, James Burkart, Mark Mikl
C. John Eudy, Adam Berry, Jordan Ritter
D. Craig Zimmerman, Eric Lambert, Scott Linehart

2. Regarding Community Manager (CM) access to Lease Charges:
A. CMs have full access to make Lease Charges modifications.
B. CMs do not have access. Lease Charge requests should be sent to ast@essex.com.
C. CMs have access to modify Lease Charges that meet specific criteria. For example: CMs have access to process all increases, but only decreases up to $100.
D. Housing Authority Lease Charges should not be modified by CMs.

3. When a resident renewal takes please, the previous Lease Charge should be deleted so that the billing is discontinued.
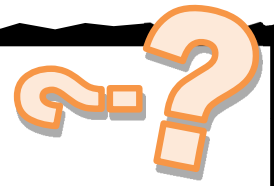A. True
B. False

4. When a resident rents a property amenity/resource on Rent Café, the deposit is charged at the time the reservation is made online.
A. True
B. False

5. The Review Resident>Swap Tenant/Roommate link does what?
A. Processes a tenant/roommate swap.
B. Creates a memo notating the swap has occurred.
C. Clears the CheckScan and ACH EFTs for all residents in the unit.
D. Clears the credit card info for all residents in the unit.
E. Clears any recurring autopay setup for all residents in the unit.
F. A, B and E
G. A, C and E
H. All of the above.

6. If you have access to Rent Café Site Manager, your sign on is the same as:
A. Your Yardi sign on.
B. Your Essex email address.
C. Only residents have this access.

7. If when processing a ZDR this message "Error: 0.00 Cannot use more than 1 prepay in a receipt" is received, you should:
A. Convert the prepays to a credit and then reallocate.
B. Process each prepay individually.
C. Contact the Essex Helpline to report a system error.

8. If you receive notification that a resident's ACH payment has been rejected due to incorrect routing or bank information, you should:
A. Process an NSF.
B. Notify the resident and collect a replacement payment.
C. Do nothing.

9. Your Essex network credentials should only be shared with:
A. Essex IT.
B. Your immediate supervisor.
C. Your credentials should not be shared with anyone.

10. Should it be become necessary to NSF a payment item posted as cash, you should:
A. Contact AST for assistance.
B. Charge the amount of the payment to offset the returned item and obtain payment from the resident for the returned amount.
C. Update the payment type from the Yardi toolbox.
D. Both A and B are acceptable.

11. When posting a check where the dollar amount and actual written amount indicate different payment amounts, what payment amount is honored by the banking institution?
A. The actual written amount.
B. The dollar amount
C. Neither—The check is rejected from the bank and processed as a reversal by AST.