



Tenant Profile

Property Management Solutions for Over 30 Years

Overview

This provides a brief overview of the fields on the Tenant Profile and links to other Help documents with more specific information.

This profile defines the tenant and the lease, and ties the tenant to a unit. More than one tenant can be assigned to a unit.

Each profile must have a: **Record ID** consisting of an **ID** (short description) field and a **Long Description** field which uniquely identifies that profile record.

The number of tenants per unit is unlimited. Tenants can be in a current, future or past status. A separate history is maintained for each tenant and the transaction history is available indefinitely.

- Tenants who are not paying rent can be entered for informational and reporting purposes.
- If there are multiple tenants who are paying rent they can be handled in several ways. Payments received can be recorded and applied to the prime (responsible) tenant or to each tenant individually. See [Help document #384](#) for specific information.
- HUD tenants can be handled in one of several ways. See the [Help document #285](#) for information.

If a tenant moves to a new unit, see [Help document #242](#) for help on how to proceed.

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Tenant Tab

This tab contains basic information including the unit the tenant is assigned to, and email and mailing address information.

The screenshot shows the 'Tenant Tab' for 'Joseph P. Bruno'. At the top, there is a header with the tenant's name and a dropdown menu. Below this, there are fields for 'ID' (BRUNO), 'Name' (Joseph P. Bruno), a checkbox for 'No Payments', and a 'Status' dropdown set to 'Current'. There are two buttons: 'Tenant Info' and 'Upload Manager'. The main section is divided into 'Unit Information' and 'Permanent Address'.

Unit Information:

- Unit:** FAIR436: 436 Fairway Drive (highlighted in cyan)
- Responsible Tenant:** (empty field)
- Legal Tenants:** Joseph P. Bruno, Vivian C. Bruno
- Primary Email:** JoeB@promas.com; Bruno.Joe@gmail.com (with a 'Send' button)
- Secondary Email:** vivian@gmail.com (with a 'Send' button)
- Mail Correspondence to Unit:** (checked)
- Post to Responsible Tenant:** (unchecked)
- Buttons:** 'Move to a New Unit'

Permanent Address:

- Joseph P. Bruno
- 436 Fairway Drive
- Vienna, VA 22180 (highlighted in cyan)
- 22180 (with a 'ZIP' icon and a 'Foreign' checkbox)

Phone Numbers:

- Contact:** Joseph P. Bruno
- Day:** 703-555-2306
- Night:** 703-555-2898
- Cell:** (empty field)
- FAX:** (empty field)

Salutations:

- Informal Salutation:** Joe
- Formal Salutation:** (empty field)

At the bottom, there is a navigation bar with tabs: 1. Tenant, 2. Lease, 3. Rent Changes, 4. Recurring Charges, 5. Categories, 6. Documentation.

Unit – Choose the unit by clicking on the <Flashlight> to bring up the list of all units. Choosing the unit will fill in the **Permanent Address** information.

Mail Correspondence to Unit – If the tenant's permanent address is different from the unit address, you can mark this checkbox to send correspondence to the unit address instead of the permanent address.

Email Address

There are 2 email address fields.

Primary Email: This freeform 120 character field is for one or more e-mail addresses. The associated <Send> button will bring up your default email program composition screen so you can enter a subject and message. Upon sending and closing you are returned to the profile.

To enter multiple email addresses you must use the separator character required by your default email program. For example, Outlook requires a semi-colon; Outlook Express requires either a comma or semi-colon; HeroPM requires a semi-colon. There should be no space after the semi-colon, just type in the next email address.

Secondary Email: This field can hold an additional email address that will be used if you click on the <Send> button. Use this field for Text by Email.

Text by Email

This field can be found in in the profiles for owner, tenant, vendor and manager. Clicking the Send button will bring up your email program so you can type your text message in the email body. It will be sent as a text. If they reply it will come to your email program.

You will have to know the format of the text-by-email address for your clients phone carrier. For example, if the clients phone number is 777-555-1234 the text by email would be:

- Verizon -- 7775551234@vtext.com
- AT&T -- 7775551234@txt.att.net
- Sprint -- 7775551234@messaging.sprintpcs.com
- T-Mobile -- 7775551234@tmobile.net
- Cricket - 7775551234@sms.mycricket.com
- US Cellular -- 7775551234@email.uscc.net

Phone Numbers - Up to 9 phone numbers can be entered.

Formal and Informal Salutation - These fields can be used in letters created in PROMAS.

Lease Tab

The screenshot shows the 'Lease Tab' for tenant 'Joseph P. Bruno'. The interface includes a header with the tenant's name and ID 'BRUNO'. Below this, there are several sections for lease details:

- Lease Section:** Includes 'Rent Charge' (RENT: Rent), 'Amount' (\$1,140.00), 'Memo', 'Rate Table' (FAIFAX: Fairfax County), 'Notices' (DL: Late notice), 'Late Fees' (25: Fixed \$25), and 'Grace Period' (5).
- Rent Summary Section:** Includes 'Amount' (\$1,140.00), 'Schedule' (Monthly), 'Next Scheduled' (3/1/2019), 'Schedule Expires', and 'Review Date'.
- Lease Dates Section:** Includes 'Lease Type' (Closed), 'Move In' (7/1/2018), 'Lease Starts' (7/1/2018), 'Notice Given', 'Lease Expires' (6/30/2019), and 'Move Out'.
- Short Term Rental Section:** Includes 'Guest ID' (15th).

At the bottom, there is a navigation bar with tabs: 1. Tenant, 2. Lease, 3. Rent Changes, 4. Recurring Charges, 5. Categories, 6. Documentation.

Lease Info

Rent Charge - This field contains the Charge ID that will be used on the rent charge transaction. This code is defined in the Setup, Charge Codes function. You can type in the code or use the Find List to select it.

Amount - This is a numeric field for the amount of the actual rent. The amount entered here will fill in the Amount field under the Rent Summary information.

Per Square Foot - Put an X in this check box if the rent amount is calculated based on the Square Footage entered in the Unit Profile. The calculated amount will be entered in the Amount field under the Rent Summary information.

Memo - Freeform field for a memo that is appended to the rent charge.

Rate Table – The rate table is used to define interest rates on security deposits and tax rates on rents and other changes. If no rate table is selected, no taxes will be charged to the tenant and no interest will be paid on security deposits. See [Help document #395](#) for a complete explanation of the Rate Table.

Late Fees - See the [Help document #213](#) for a complete explanation of the late fee profile and how to charge late fees.

This field contains the Late Fee structure you wish to use for this lease. Select from the Find List of late fee profiles created in Setup, Late Fee. If you have not set up a late fee profile for the rate structure for this lease, click on the folder folder button and a blank Late Fee Profile screen will appear so you can add one.

If no late fee profile is selected the tenant will not be charged late fees. He will also not show up on the Past Due Rent report. If you want the tenant to show on the Past Due Rent report but not be charged late fees, create a Late Fee Profile for No Fee.

Grace Period - If the Late Fee Profile selected above contains a Grace Period in Days, that number from that profile will fill in here. If not, enter the grace period for assessing late fees. Assuming the rent is due on the 1st of the month and the grace period is 5 days, a payment is late starting on the 7th and will appear in a list of late fee candidates from that date on until payment is made. The grace period in this field is the grace period used to determine late fee candidates.

Additional Management Fee (%) - The percent entered here will be added to the management fee structure as selected in the Unit Profile and defined in the Management Fee Profile. The combination of the fees will be used to calculate the actual fee charged. This additional fee field is used when the unit fee varies based upon circumstances like the length of the lease term.

Lease Dates

These fields establish the type of lease, the starting and ending dates of the lease, and the dates when the tenant moved in and moved out.

- **Lease Type** - Lease types are closed, open or month-to-month. All types can have starting and ending dates. The types and dates are for reporting purposes only. A closed lease has both a starting and ending date. An open lease has a starting date but no ending date. A month-to-month has neither a starting nor an ending date.

- **Lease Starts** - This date field contains the date the lease started. This date is used to determine first month's rent and for reporting purposes. It will affect taking a leasing fee thru Pro-rated Rent or Scheduled Receivables, Management Fees. Clicking on the DATE button will bring up the calendar.
- **Lease Expires** - This date field contains the date the lease expires. This generates an event reminder and is used for reporting purposes. It has no effect on charging rent. If the lease dates overlap with other tenants in the unit a warning will be displayed.
- **Move In** - This date field is for the date of the actual move in. It is used for reporting purposes only. It has no effect on charging rent.
- **Notice Given** - The date the tenant notifies management of intent to not renew the lease. Used for reporting and tracking.
- **Move Out** - This date field is for the date of the actual move out. It generates an event reminder and is used for reporting purposes. It has no effect on charging rent.

Rent Changes Tab

The screenshot shows the 'Rent Changes' tab for tenant 'Joseph P. Bruno'. At the top, there are fields for 'ID' (BRUNO), 'Name' (Joseph P. Bruno), a 'No Payments' checkbox, and a 'Status' dropdown menu set to 'Current'. An 'Upload Manager' button is located to the right. The main area is divided into three sections: 'Rent Changes', 'Tax Information', and 'Statements'. The 'Rent Changes' section contains a table with one entry: 'Effective' date '7/1/2019' and 'Amount' '\$1,170.00'. The 'Tax Information' section has a 'Click To Display' button. The 'Statements' section shows 'BASIC: Basic Statement' as the selected statement type, a 'Publishing' dropdown set to 'Default', and two checkboxes: 'No Paper Statements' and 'No Internet Statements'. At the bottom, a navigation bar includes tabs for '1. Tenant', '2. Lease', '3. Rent Changes', '4. Recurring Charges', '5. Categories', and '6. Documentation'.

Rent Changes

See the [Help document #761](#) for more information about the Rent Changes.

An unlimited number of rent change dates can be entered. The rent summary field will update as the rent change date becomes current. Old rent changes are deleted after processing.

- **Effective** - Use this date field to enter the effective date of the rent change.
- **Amount** - This is a numeric field for the new rent amount.

How it works

The default is that the tenant profile (Lease tab, Lease Amount field) will be updated with the new rent amount if the Effective date falls before the Scheduled Thru date on the Scheduled Receivables, Rent screen. This means that if the Effective date is 10/1 and you charge rents for Sept with a Next Scheduled date of 9/1 or 9/30, the tenant profile will not be updated. When you charge rents for October, the new charge will take effect and the profile will be updated.

If you prefer that the rent amount reflect what the rent will be the next time rent is charged, go to Setup, Database Settings, General tab. Mark the checkbox for Rent Changes. With the checkbox marked, when rents are charged for September and there is a rent change for October, the rent amount will be updated and the rent change line item will be removed.

Invoicing

These fields set up the ways to split invoice charges between owner and tenant if the Split Charge with Owner box is checked on the invoice or check. If that box is not checked these fields will not be referenced.

- **Split Percentage** - This is the percent of the invoice amount to charge the tenant if the invoice line item is marked Split Charge With Owner.
- **Split Maximum** - This dollar amount is the maximum amount to charge the tenant on any check.

If, for example, the tenant is responsible for the first \$30 of any repairs to the unit, you would set the Split Percentage to 100 and the Split Maximum to \$30. If the tenant is responsible for 10% or repairs up to a maximum of \$50 you would set the Split Percentage to 10 and the Split Maximum to 50.

Statements

Choose the Statement Style you want to send the tenant.

Publishing

There are 7 choices for this field.

- Default* - owners and tenants - Send to Portal. Vendors - Send to Portal and copy to email; managers - send to email.
- Send to Email
- Do not publish
- Send to email - copy to manager
- Send to Portal
- Send to Portal - copy to email
- Suspend

No Paper Statements

Marking this checkbox will prevent a paper copy from being printed when the Statement Filter on the Mailings, Tenant Statement screen is set to Paper Statements.

No Internet Statements

Marking this checkbox causes this tenant to be skipped when publishing tenant statements in HeroPM.

Tax Information

If you will be sending a 1099 then the Send 1099 and Taxpayer ID fields must be filled in. If the tenant name field contains other than the tenant's legal name, then the Taxpayer Name should be filled in.

Once entered, only someone with access to the Tax Reporting module will be able to see the Taxpayer ID information. Access to the Tax Reporting module is done through [Access Groups](#).

Recurring Charges Tab

The screenshot shows the 'Recurring Charges Other Than Rent' section of a software interface. At the top, there is a header for 'Joseph P. Bruno [Tenant]' with fields for ID (BRUNO), Name (Joseph P. Bruno), a 'No Payments' checkbox, and a 'Status' dropdown menu set to 'Current'. An 'Upload Manager' button is also present. Below this, the 'Recurring Charges Other Than Rent' section contains a table with the following data:

Charge	Amount	Per Sq Foot	Pay Management	Next Scheduled	Schedule Expires	Schedule
TRASH: Trash Removal	\$25.00	<input type="checkbox"/>	<input checked="" type="checkbox"/>	4/1/2019		Monthly

The 'Memo' field for this charge is 'Reimbursement from tenant'. At the bottom of the interface, there is a navigation bar with tabs: 1. Tenant, 2. Lease, 3. Rent Changes, 4. Recurring Charges (selected), 5. Categories, and 6. Documentation.

Recurring Charges other than Rent

Any charge or credit can be scheduled for automatic posting when the Recurring Charge function is run. An example is trash collection charges paid quarterly. This is not for rent. Rent is handled separately thru the information on the Lease tab. It can be used for a Rent Credit or concession.

To delete a recurring charge line item click into the line item and press <Ctrl><Delete>.

- **Charge** - Type in the Charge ID code or select it from the Find List. Charge ID's are created in Setup, Charges.
- **Amount** - This is a numeric field. Enter either the amount of the charge or the amount and square footage. Enter a negative amount if this is a recurring credit.
- **Per Square Foot** - Put an X in this check box if the charge amount is to be calculated based on the square footage as defined in the unit profile.
- **Memo** - Enter any memo you wish posted with the charge. The memo appears on the owner and tenant statements.

- **Schedule** - Select the schedule from the Find List. This will determine the recurring charge frequency.
- **Next Scheduled** - Use this date field to enter the date of the next scheduled charge. If a date in the future is chosen, no charge will be posted until that date is within the Scheduled Through date when the charges are compiled. When a charge is posted, the date will be changed to the next scheduled charge date based on the schedule.
 - **Example:** If the Next Scheduled date is March 15 before the charges are posted, and the Frequency is monthly, then the Next Scheduled date after posting will be April 15.
- **Schedule Expires** - Use this date field to enter the date the recurring charge should expire. Recurring charges will not be posted after this date. When the Schedule Expires date falls within the Scheduled Through date, the Next Scheduled date is updated per the Schedule and the Schedule is changed to Expired.

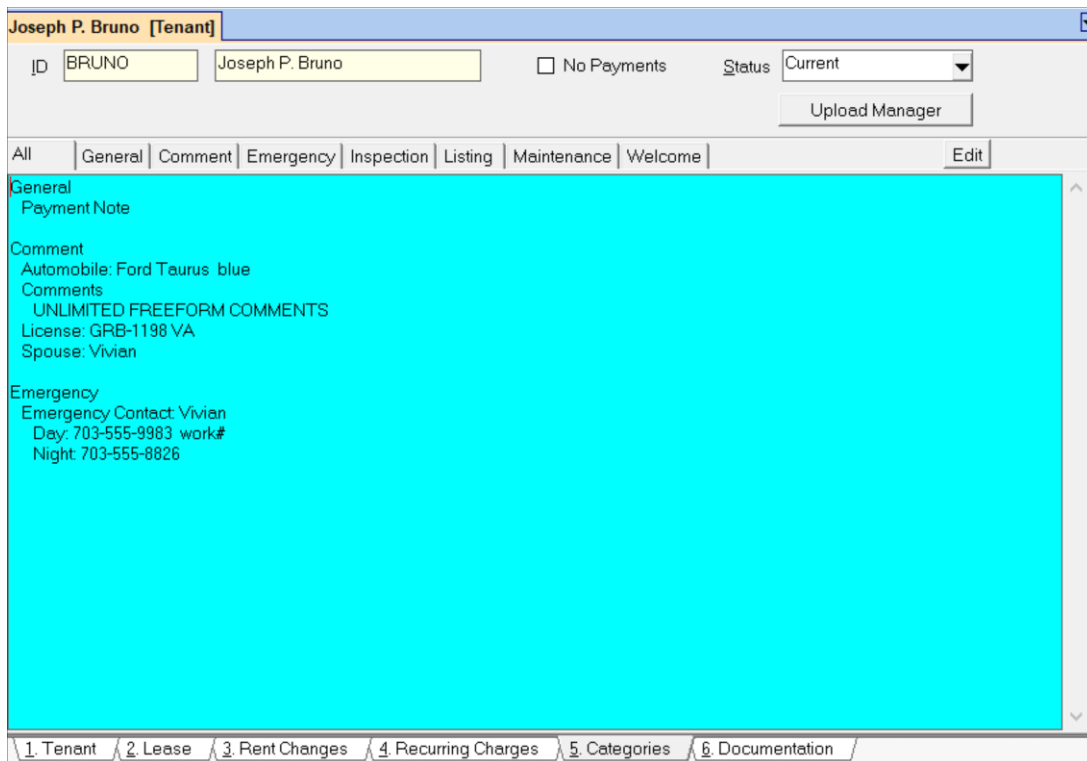
Negative Recurring Charge

A recurring charge will accept a negative amount. When Recurring charges are processed, an Adjust Open Credits transaction will be posted. The owner or management group will be debited for the Account Code the charge points to and the tenant will receive open credits in that amount.

This feature can be used to credit the tenant on a recurring schedule and to record transactions such as rent concessions.

Categories Tab

Each profile has a Categories tab. Clicking that tab displays all the categories associated with that profile. To see the categories by type, there are folder buttons at the top of the display.



Use the Edit button to modify an existing category or add a new one to the profile. Category entries are listed in the sequence entered within type. To add another category either click in the open area below the last one entered or tab out of the last one entered. To delete a category use the <Ctrl><Delete> key sequence.

The category can be selected from the Find List or a new one can be added using the Folder button.

- **Qualifier** – this field of up to 20 characters can be used for identification purposes.
- **Effective** – the date the category starts for Alerts and Reminders
- **Expires** – date the category ceases for alerts and reminders
- **Comment** – unlimited field for information relating to the category.

Reports to show what categories are available can be found in Reports, Profile Reports – Categories by Id, Categories by Type

Documentation Tab

This tab lets you attach files to the profile. When attached, the file is copied into the Documents folder in the database folder (typically RPROMAS\Data\Documents). The Documents folder is not part of the automatic backup. You must back that folder up independently of the automatic backup.

This function is handy for easy access to the lease, digital and scanned pictures, work processing documents, pdf documents, and the management contract.

Although any file can be attached, the only ones that can be opened are those that your Windows operating system or other application programs will open.

Each item attached has a Document Name which is the file name assigned by the operating system. A comments field provides for an explanation of the document contents.

To select a document, click on the <Load> button to find the file. Only one file can be selected at a time. Double clicking on the file you want will fill in the document name field and copy the file to the Documents folder.

To view the file, click the Open button. Additional files can be attached by clicking in the open area below the last line item.

To delete an attached file, click in the document field and do a <Ctrl><Delete>. Click <OK> to the message. The physical file is not deleted from the documents folder, just from the Documents page of the profile.

Disbursement Button

Clicking this button will display any disbursements made to the tenant, usually security deposit refunds.