



# Charge Rent Each Month

Property Management Solutions for Over 30 Years

## Overview

This document will explain how to set the rent amount for each tenant and charge the rents and recurring charges each month.

## Establish Rent Amount for Each Tenant

The rent amount is entered in the TENANT PROFILE on the Lease tab, in the [Amount] field. The schedule for charging rent is also set on that tab in the tenant profile under the Rent Summary information.

**Joseph P. Bruno [Tenant]**

ID: BRUNO    Joseph P. Bruno     No Payments    Status: Current

Upload Manager

<b>Lease</b>	<b>Rent Summary</b>
Rent Charge: RENT: Rent	Amount: \$1,140.00
Amount: \$1,140.00 <input type="checkbox"/> Per Square Foot	Schedule: Monthly
Memo:	Next Scheduled: 11/1/2018
Rate Table: FAIFAX: Fairfax County	Schedule Expires:
Notices: DL: Late notice	Review Date:
Late Fees: 25: Fixed \$25	
Grace Period: 4    Additional Management Fee (%):	
<b>Lease Dates</b>	<b>Short Term Rental</b>
Lease Type: Closed    Move In: 12/1/2017	Guest ID:
Lease Starts: 12/1/2017    Notice Given:	
Lease Expires: 9/3/2018    Move Out:	

## Charge Rents

1. Select <<AR, Scheduled Receivables>>. The radio button for <Rent> should be selected.

**Scheduled Receivables**

Rent  
 Recurring Charges  
 Late Fees  
 Management Fees NOT on a Tenant Payment

Scheduled Through: 11/20/2018

Limit to Schedule: [Dropdown]

Restrict to: [Text Field]

2. Change the [Scheduled Through] date if necessary. If you are posting the rent charges at the end of the month for next month change the date to next month
3. Click the <Compile> button. A list of tenants to be charged displays on the screen.

Date	Tenant	Schedule	Amount	
3/1/2019	BRUNO: Joseph P. Bruno	Monthly Rent	\$1,140.00	<input type="checkbox"/> Skip
	Unit FAIR436: 436 Fairway Drive			<input type="checkbox"/> First Month's Rent
3/1/2019	GURO: Edward & Marianne Guro	Monthly Rent	\$950.00	<input type="checkbox"/> Skip
	Unit MAIN212: 212 Main Street			<input checked="" type="checkbox"/> First Month's Rent
3/1/2019	ROD: Jerry and Karyl Rodriguez	Monthly Rent	\$980.00	<input type="checkbox"/> Skip
	Unit OAK2118: 2118 Oak Street			<input type="checkbox"/> First Month's Rent
3/1/2019	ROSEMAN: Rita Roseman	Monthly Rent	\$690.00	<input type="checkbox"/> Skip
	Unit CEDAR327: 327 Cedar Lane			<input type="checkbox"/> First Month's Rent
3/1/2019	SCHRADER: Phyllis Schrader	Monthly Rent	\$1,150.00	<input type="checkbox"/> Skip
	Unit WB203: Willow Brooke Unit 203			<input type="checkbox"/> First Month's Rent

Sort By Tenant    Sort By Unit

Buttons: Help, Post, Report, Cancel

Navigation: All Rents / Selected Rents / First Month Rents / Selected First Month Rents / Skipped Rents

4. Review the candidates on the screen and make any changes necessary.
5. The list can be sorted by tenant or unit using the radio buttons at the bottom left.
6. Print a report if you wish by clicking the <Report> button. The report will print in the order selected for the screen display.
7. Click the <Post> button to record the charges.

The tenant history for each tenant charged now reflects the amount they owe for rent. You can view or edit these in <AR, Tenant History>, Unpaid Charges tab.

As part of the posting process the TENANT PROFILE, Lease tab, [Next Scheduled] field is updated (incremented based on the schedule). If the new [Next Scheduled] date is after the [Schedule Expires] date the [Schedule] will be changed to Expired thus keeping the tenant from being charged automatically in the future.

The screenshot shows the tenant profile for Joseph P. Bruno. The top section includes the tenant's name, ID (BRUNO), and status (Current). Below this are several sections for lease details:

- Lease:** Includes fields for 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 (4).
- Rent Summary:** Shows Amount (\$1,140.00), Schedule (Monthly), Next Scheduled (12/1/2018), Schedule Expires, and Review Date.
- Lease Dates:** Includes Lease Type (Closed), Move In (12/1/2017), Lease Starts (12/1/2017), Notice Given, Lease Expires (9/3/2018), and Move Out.
- Short Term Rental:** Includes a Guest ID field.

A red arrow points to the 'Next Scheduled' date field in the Rent Summary section, which is set to 12/1/2018.

## Establish Recurring Charges

Recurring charge information is entered in the TENANT PROFILE, Recurring Charges tab. Both the amount and the schedule are entered there. These charges are normally posted after doing the rent charges each month.

The screenshot shows the 'Recurring Charges Other Than Rent' section of a tenant profile for Joseph P. Bruno. The 'Charge' field is set to 'TRASH: Trash Removal' with a 'Schedule' of 'Monthly'. The 'Amount' is '\$25.00', and the 'Next Scheduled' date is '11/1/2018'. The 'Memo' field contains 'Reimbursement from tenant'. Red arrows point to the 'Charge' and 'Schedule' fields.

Charge	TRASH: Trash Removal	Schedule	Monthly
Amount	\$25.00	Next Scheduled	11/1/2018
Memo	Reimbursement from tenant		

## Post Recurring Charges

1. Select <<AR, Scheduled Receivables>>

The screenshot shows the 'Scheduled Receivables' window with the 'Recurring Charges' radio button selected. The 'Scheduled Through' date is '11/20/2018'.

Scheduled Through	11/20/2018
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2. Click the <Recurring Charges> radio button.
3. Click the <Compile> button.
4. Review the list and make any changes necessary.
5. Click the <Post> button to record the charges.