



Category Examples

Property Management Solutions for Over 30 Years

Overview

This document explains how to set up Categories. It then has some examples of how categories can be used.

Create Categories

Categories can be used for a variety of purposes and are part of the Owner, Property, Management Group, Unit, Tenant, Unit Type and Vendor profiles. Most reports and mailings can be limited to a category. Information associated with a category can be mail-merged into word processing documents. There is no limit to the number of category items that can be added to a profile.

Categories are created in <<Setup, Categories>>. Categories are identified by a unique Name, which can be up to 40 characters..

Categories are broken out into seven Category Types – General, Comment, Emergency, Inspection, Listing, Maintenance, and Welcome.

An optional Section description allows for grouping categories, while a numeric field Sort Position positions the category on a listing.

Categories can be part of an Alert Type that displays a pop-up screen in the Invoice, Move Out, Receipt, and Work Order functions. They can generate reminders on the specified Effective and/or Expire dates. A category can be designated a Label or Note. A Category can be Profile Specific. An unlimited comments field that copies into the profile is available for the category.

Profile Specific – If this checkbox is marked, the use of the category is limited to the profile set that it is assigned to. If not marked, the category is live up the line when running reports and creating letters. For example, limiting a tenant report or letter to a category will search for that category in the tenant, unit, unit type, and owner/property profiles. If the category is marked profile specific in the unit, it will not be considered a match.

Category is a Label – If only this checkbox is marked, the category name will precede any qualifier in the profile entry with the comments indented below.

Category is a Note – If this checkbox is marked, the category name is suppressed in the profile entry. If this checkbox is not marked, the category name is included in the profile entry.

The category defined in Setup, Categories is the generic category that is selected in a profile. The specifics relating to the category are defined in the profile screen.

Comments - the information entered here will be displayed in the profile when viewed on the categories tab, but will not be in the Comment field when you edit the category. If you want the

information to be part of the Comment in the profile when the category is selected, mark the checkbox. Then the comments entered become a template for the category when selected.

The rules are below for how the category information will print when selected as a text substitution in a letter. In each case, the Comment (if there is one) will be indented below the other information.

Note	Label	Description
No	No	Qualifier + Dates + Category Name
No	Yes	Category Name: Qualifier + Dates
Yes	No	Dates + Qualifier (Category Name if no Qualifier)
Yes	Yes	Qualifier (Category Name if no Qualifier): Dates

Delete a Category

Use the (-) button to delete a category in <<Setup, Categories>>. Deleting a category deletes all references to that category in all profiles. If you want to delete a category from a profile, use the <Ctrl><Delete> key while editing the category in the profile.

Category Examples

Sales Tax

To generate a recurring transfer of a percentage of income received for a period.

- Setup, Categories
 - Category Name – Chandler
 - Category Type – General
 - Comments – None
- Owner/Property/Unit Profile
 - Category – Chandler
 - Qualifier – Owner’s Tax ID
 - Comments – Owner name and address

When Recurring Journal Entries, Tax Collections are run, restricted to this category, an ASCII file with the transfer transaction data will be generated.

Maintenance Alert for Work orders

- Setup, Categories
 - Category Name – Home Warranty
 - Category Type – Maintenance
 - Reminder Type – Expires
 - Category is a label

- Unit Profile
 - Category – Home Warranty
 - Qualifier – Company Name
 - Comment – any particulars
 - Effective – Start Date
 - Expires – End Date

Alert will display for work orders and create a reminder on the Expires date.

Listing

One of the sets of amenities used for marketing purposes when a property is available to rent.

Setup, Categories

Category Name – Stove

Section – Kitchen

Category Type – Listing

Style – Label

Alert Type - Workorder

Comments – None

Unit Profile

Category – Stove

Qualifier – Gas

Comments – GE Model G23, 4 burner, convection oven, self-cleaning.

Bray and Scarf warranty.

Effective – 4/1/2018

Expires – 3/31/2019

Stove [Category]

Name: Stove Sort Position: 4

Section: Kitchen Category is a Label:

Category Type: Listing Category is a Note:

Alert Type: Work Order Profile Specific:

Reminder Type: None Hero PM Code:

Comment:

Comment is a Template for New Categories:

All | General | Comment | Emergency | Inspection | Listing | Maintenance | Welcome

Category: Lawn Service Effective: 2/28/2019

Qualifier: Lawn Doctor

Category: Stove Effective: 4/1/2018

Qualifier: Gas Expires: 3/31/2019

Comment: GE model G23; 4 burner; convection oven; self cleaning; Bray and Scarf warranty

The category information will show in the Listing folder of the Unit Profile and pop up when a work order for the unit is entered.

327 Cedar Lane [Unit]

ID: CEDAR327 Name: 327 Cedar Lane Key: Status: Active

Buttons: Upload Manager, Inspections

All | General | Comment | Emergency | Inspection | Listing | Maintenance | Welcome | Edit

Kitchen

Gas 4/1/2018 to 3/31/2019 Stove

GE model G23; 4 burner; convection oven; self cleaning

Bray and Scarf warranty

Work orders - Add a Notice to Problem Description

Setup, Categories, New

Category Name – Built prior to 1978

Category Type – Maintenance

Alert Type - Workorder

Category is a label

Enter the notice into the Comment field.

Mark the "Comment is a template for new categories" checkbox.

The screenshot shows the 'Profile Reports' form for the category 'Built prior to 1978'. The form includes the following fields and options:

- Name: Built prior to 1978
- Section: (empty)
- Category Type: Maintenance
- Alert Type: Work Order
- Reminder Type: None
- Sort Position: (empty)
- Category is a Label:
- Category is a Note:
- Profile Specific:
- Hero PM Code: (empty)
- Comment: Notice: built prior to 1978
- Comment is a Template for New Categories:

Unit Profile

Category – select Built prior to 1978

The screenshot shows the 'Unit Profile' form for the unit '212 Main Street'. The form includes the following fields and options:

- ID: MAIN212
- 212 Main Street
- Key: (empty)
- Status: Active
- Buttons: Upload Manager, Inspections
- Navigation: All, General, Comment, Emergency, Inspection, Listing, Maintenance, Welcome, Edit
- Category: Built prior to 1978
- Notice: built prior to 1978

Alert will display when you create a work order. Highlight the Notice text in the Alert, do <Ctrl><C> to copy or click the <Copy to Clipboard> button, then close and click into the Problem Description field of the work order and do <Ctrl><V> to paste.

The screenshot shows the 'Work Order' form. The 'Problem Description' field is highlighted in yellow, indicating that the notice text has been pasted into it. The form includes the following fields and options:

- ID: 290319RDSN
- MAIN212
- Mark for Printing:
- Status: Unassigned
- Problem Report: Priority: Normal, Reported: 3/19/2019, Reported By: Tenant, Phone Number: 703-555-9624
- Problem Description: (highlighted)
- Site: MAIN212: 212 Main Street
- Show Alerts: (button)
- Work Order: Maintenance, Built prior to 1978, Notice: built prior to 1978

Loss Type

One Time

- Setup, Categories
- Name – Loss Type
- Section – Reason for Loss
- Category Type – Listing
- Reminder Type – Effective or Expires
- Category is a note

Unit Profile

- Category – Loss Type
- Qualifier – Reason for Loss (sold, owner move-in, Fired, Change Management)
- Comment – any details
- Effective – Date of occurrence

Reports

- Reports, Profile Reports, Category Events by Date
- Select date range
- Limit to Category – Loss Type

Management Gains

One Time

- Setup, Categories
- Name – Gains
- Section – Reason for Gain
- Category Type – Listing
- Reminder Type – Effective or Expires
- Category is a note

Unit Profile

- Category – Gains
- Qualifier – Reason for Gain (Craigs List, Rentals.com, Client referral, Newspaper ad, Competitor referral, Walk-in, Internet website, Yellow pages, Sales referral)
- Comment – any details
- Effective – Date of occurrence

Reports

- Reports, Profile Reports, Category Events
- Select date range
- Limit to Category – Gains

Management Agreement tracking using categories

Setup, Category, new
Category Name == Management Agreement
Category Type ==General
Reminder Type ==Effective and Expires
Unit or Owner profile
Category ==Management Agreement
Qualifier ==Owner Name or whatever
Effective == start date
Expires ==End date
Reports, Profile Reports, Category Events
Select Date range
Limit to Category ==Management Contract

Inspections

Semi-annual inspections - January + July
Setup, Categories, New
Category==Inspection-Semi-annual-January*
Category Type==Inspection
Reminder Type==Effective
Category is a Label
Unit Profile
Category==Inspection-Semi-annual-January
Qualifier==Inspectors Name (optional)
Comment==Inspection Notes (optional)
Effective==Next Scheduled Date (optional)

Entry will display on Event Reminders based on the Effective Date. An inspection list report can be generated by limiting to that category. A Profile Report can be run based on the Effective Date and limited to the category.

*The category name should reflect the schedule and the start month whenever the schedule is other than monthly.

<u>Name</u>	<u>Used for</u>
Inspection-Semi-annual-January	Inspections scheduled for Jan + July
Inspection-Semi-annual-April	Inspections scheduled for April and Oct.
Inspection-Quarterly-February	Inspections scheduled for Feb, May, Aug, Nov

Property Insurance

Setup, Categories, New

Name – Insurance

Reminder Type – Expires

Category is a Label

Unit Profile or Property Profile

Category – Insurance

Qualifier – Insurance Company

Comment – any details - type and amount of coverage and the contact information

Expires – insurance expiration date

Reports

Reports, Profile Reports

Select date range

Limit to Category – Insurance

Tracking Regular Services

Regular services such as furnace and gutter cleaning can be tracked using categories.

Setup, Categories, New

Name – Gutter Cleaning

Reminder Type – Effective or Expires

Unit Profile

Category – Gutter Cleaning

Qualifier – Vendor

Effective Date - last time work was performed

Expires Data - next time work should be performed

Comment – any details - and a running commentary of work performed

Reports

Reports, Profile Reports

Select date range

Limit to Category – Gutter Cleaning

Notice Given

Setup, Categories, New

Category==Notice Given

Reminder Type==Expires

Tenant Profile

Category==Notice Given

Effective Date==day notice given

Expires Date==day vacating

Profile report can be limited to that category and for category reminders for a date range.

Other Category Suggestions

Directions in Unit Profile

Pet description in Tenant Profile

Keys in Tenant and Unit Profile

Insurance information in Tenant Profile

Reasons for loss in Unit Profile

Agent of Record in Unit Profile

NSF Alert in Tenant Profile