

# ParaWest Management

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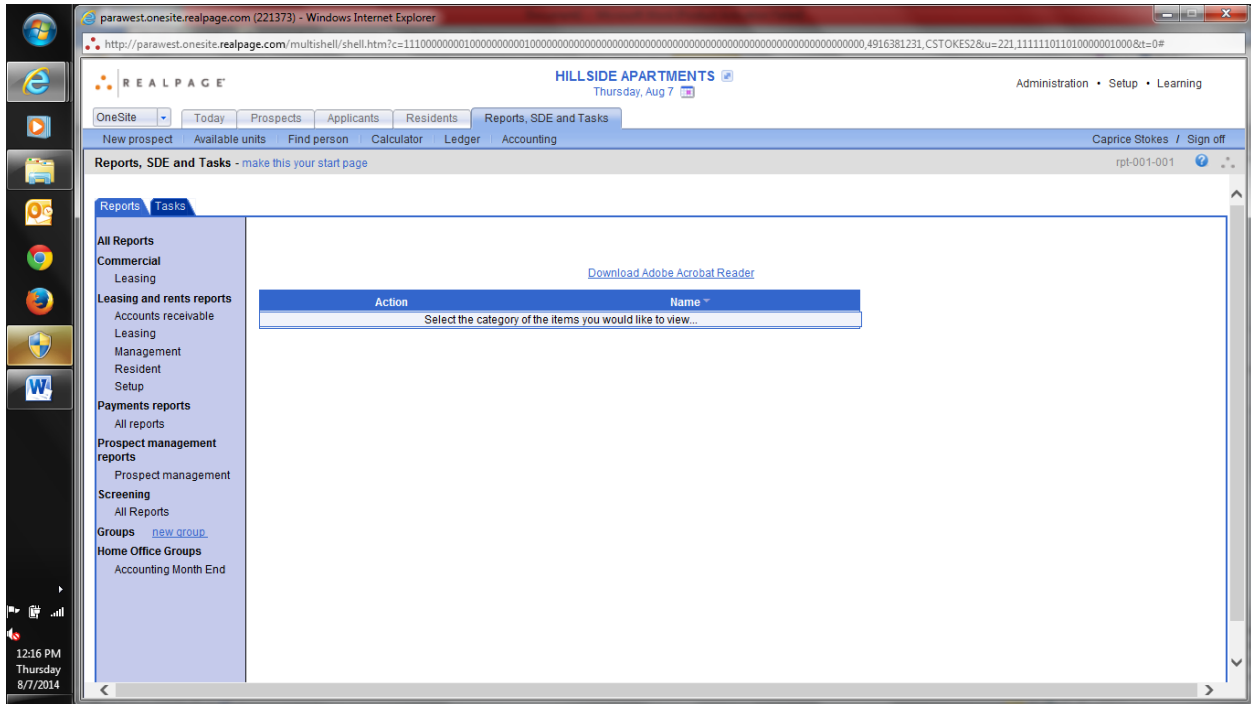
## Training for Property Managers

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Created and Presented by Caprice Stokes

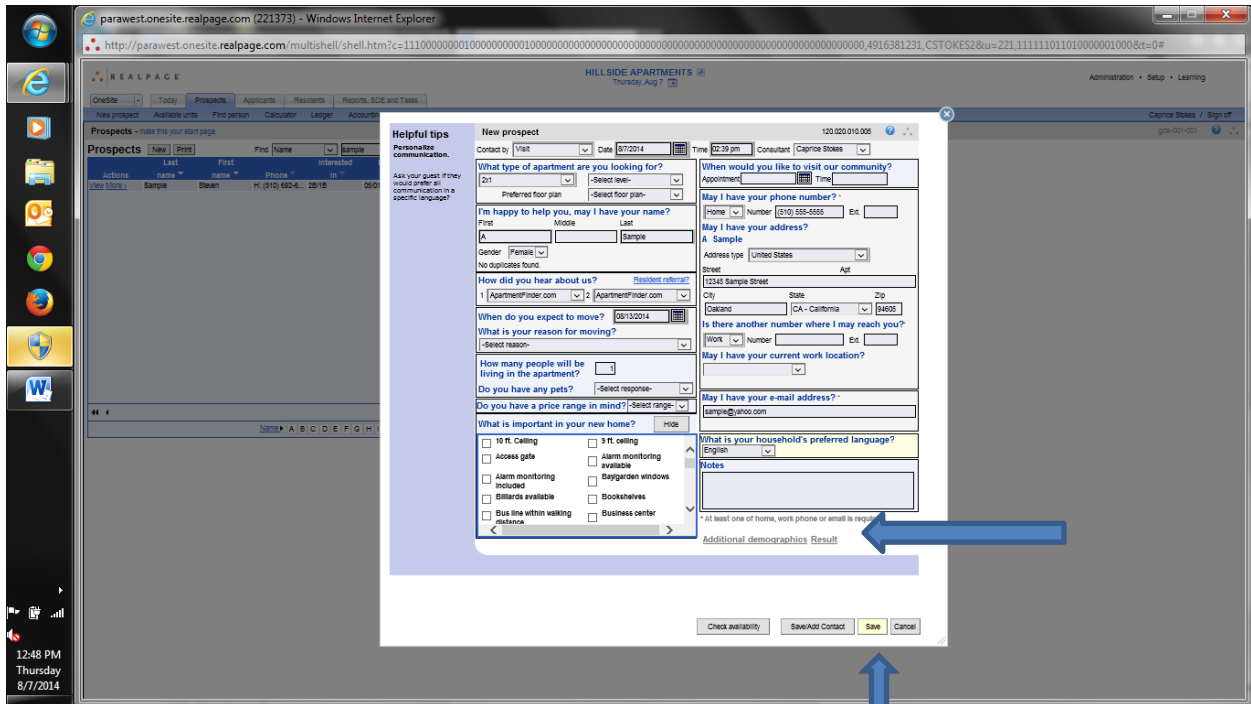
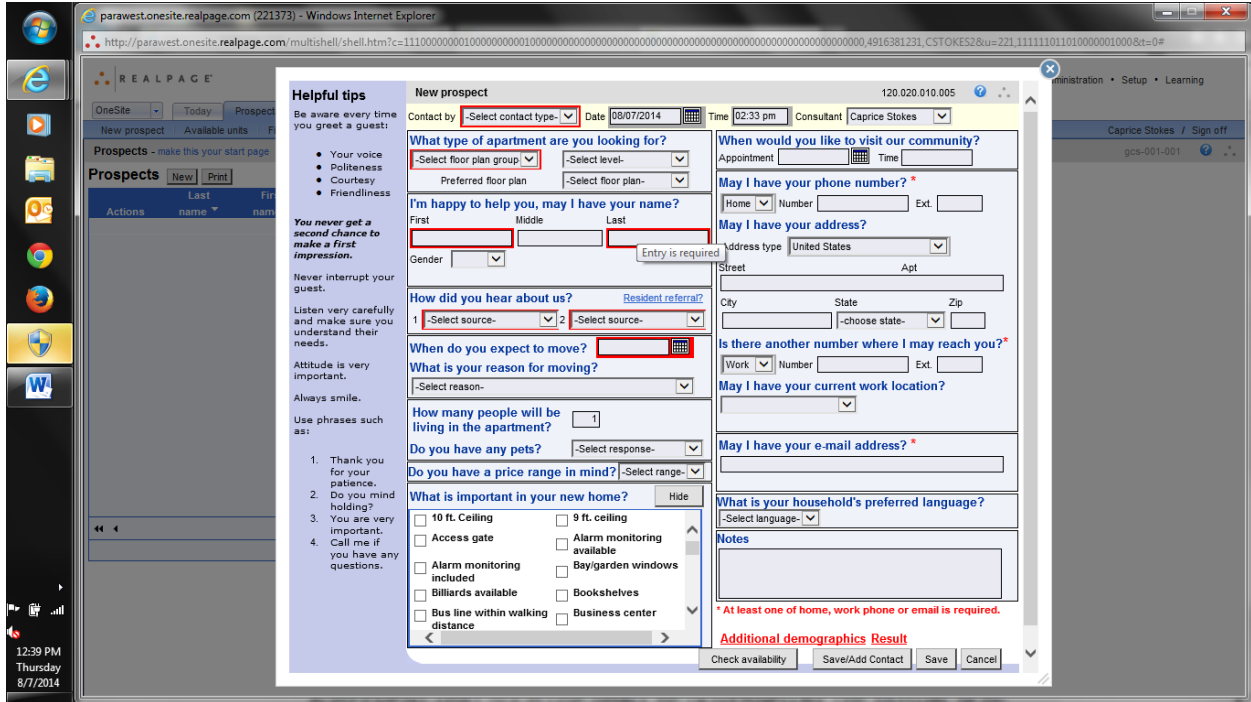
Onesite "Tabs":

Onesite "Tabs" Continued:





- Click New button
- Complete relevant fields (boxes in red) and save.



## Onesite/ParaWest Application Process:

- View Prospect Record

parawest.onesite.realpage.com (221373) - Windows Internet Explorer

REALPAGE HILLSIDE APARTMENTS Thursday, Aug 7

Administration • Setup • Learning

OneSite Today Prospects [Other tabs] [More tabs]

New prospect Available units Find person Calculator Ledger Accounting Caprice Stokes / Sign off

Prospects - make this your start page

Actions	Last name	First name	Phone	Interests	Needed by	Leasing consultant	Type	Last contact Date	Follow-up	HH	Status
<a href="#">View More</a>	Sample	A	H: (510) 555-... 2B/1B		8/13/2014	Caprice Stokes	Visit	08/07/2014	08/08/2014	H	Active
<a href="#">View More</a>	Sample	Steven	H: (510) 692-... 2B/1B		5/01/2014	Mistica Rodrig...	Phone call	02/22/2014	02/25/2014	H	Unqualified

Page 1 of 1

Name A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

- Click Apply Now

Sample, A - OneSite - Windows Internet Explorer

REALPAGE A Sample Thursday, Aug 7 12:02:040.010

Actions

- Print guest card statement
- Check availability
- Show unit
- Apply now**
- Waitlist
- Refer to sister site
- Record activity
- Schedule follow-up
- Send e-mail

**Contacts** New Refresh

Actions	Name	Gender	Relationship	Phone	E-mail
<a href="#">Edit</a>	A Sample	Female	Head of household	H:(510) 555-5555	sample@yahoo.com

Page 1 of 1

**Prospect information** Edit

Status: Active Reason for moving: -no selection-  
 Leasing consultant: Caprice Stokes 1st Advertising source: ApartmentFinder.com  
 Occupant count: 1 2nd Advertising source: ApartmentFinder.com Language Referred by: English None

Notes

**Prospect preferences**

Interested in 2x1 (\$995.00 - 995.00) Price desired -no selection- Pets None  
 Needed by 08/13/2014 Floor plan Unit -no selection-  
 Lease Term 12 Month Lease Desired floor -no selection-

**Desired features**

10 ft. Ceiling  Cable available  Conference/Meeting room  Entertainment center  Icemaker  
 9 ft. ceiling  Cathedral/vaulted ceiling  Controlled building access  Fireplace  Indoor jacuz  
 Access gate  Ceiling fan guest bedroom  Corner unit  Fitness center  ISDN or ADS

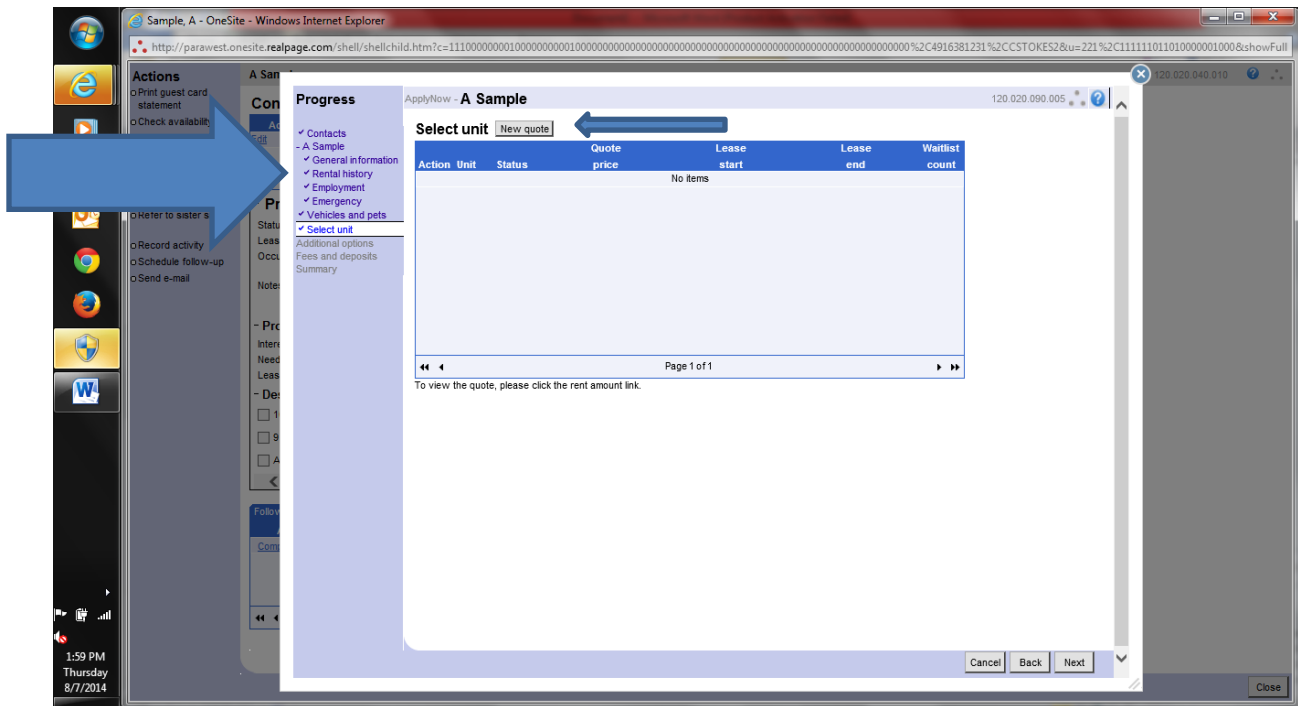
**Follow-up** Activity Units shown Quotes Schedule follow-up

Actions	Due Date	Type	Assigned to	Confirmed?	Priority	Notes
<a href="#">Complete</a>	08/08/2014	Visit	Caprice Stokes		High	Follow-up on new prospect visit

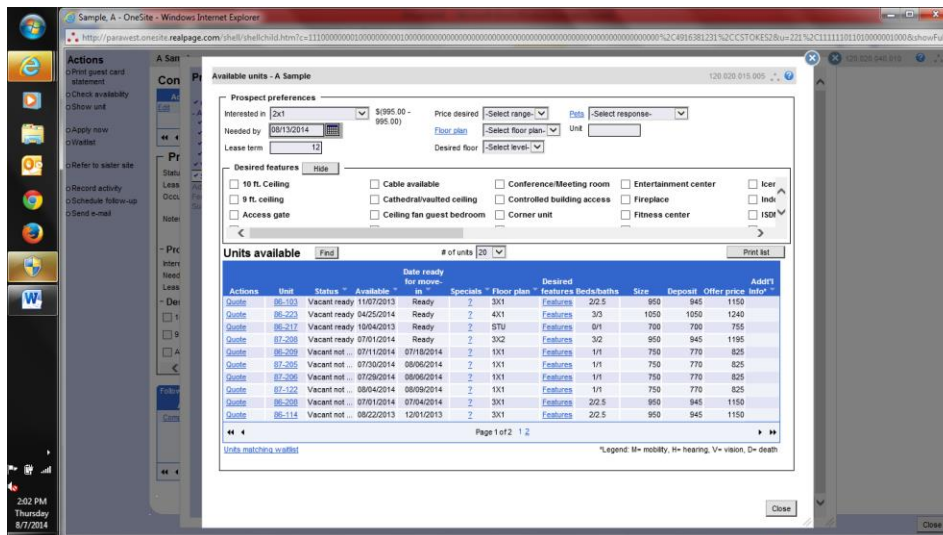
Page 1 of 1

Close

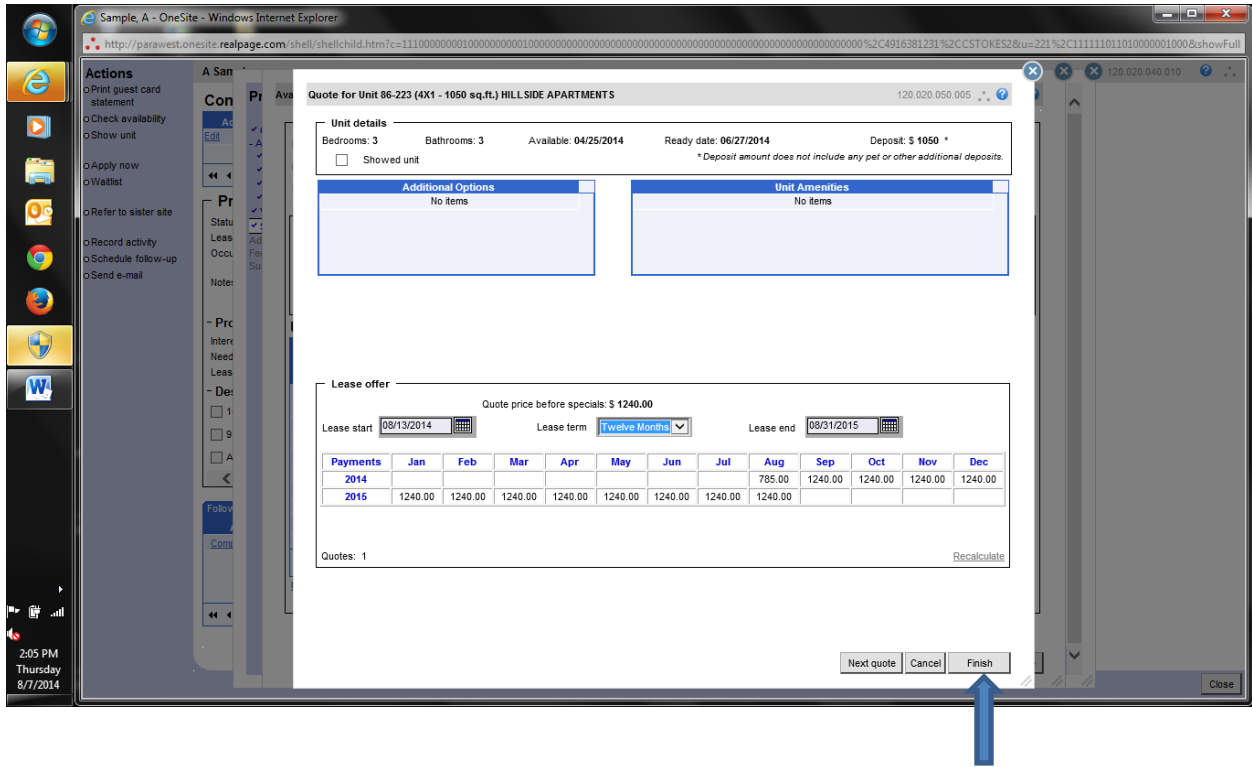
- Enter or Verify General Information (This goes on for several screens)
- Enter Rental History
- Enter Employment History
- Enter Emergency Contacts
- Enter Vehicle Information
- All Other Information
- Click Save- Click Next



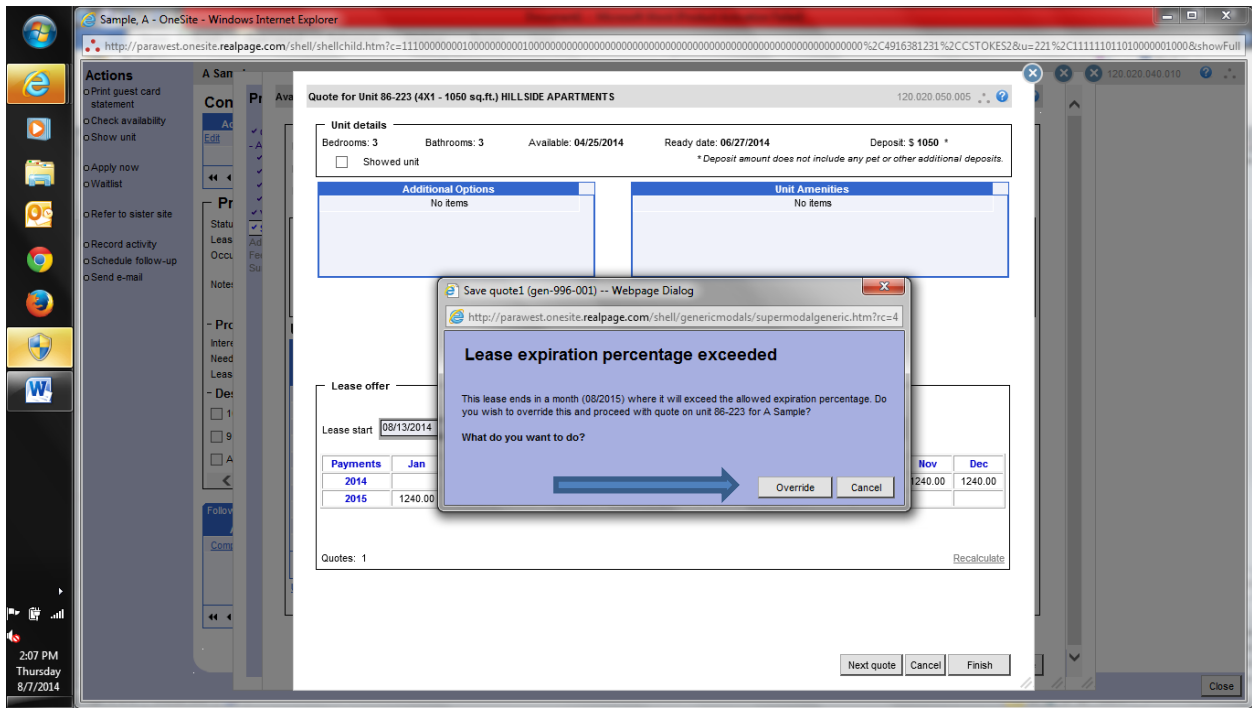
- Select new quote, click next. Choose desired unit by clicking quote. Then click close.



- When you close, you will view a screen to verify choices. If all is correct, click finish.

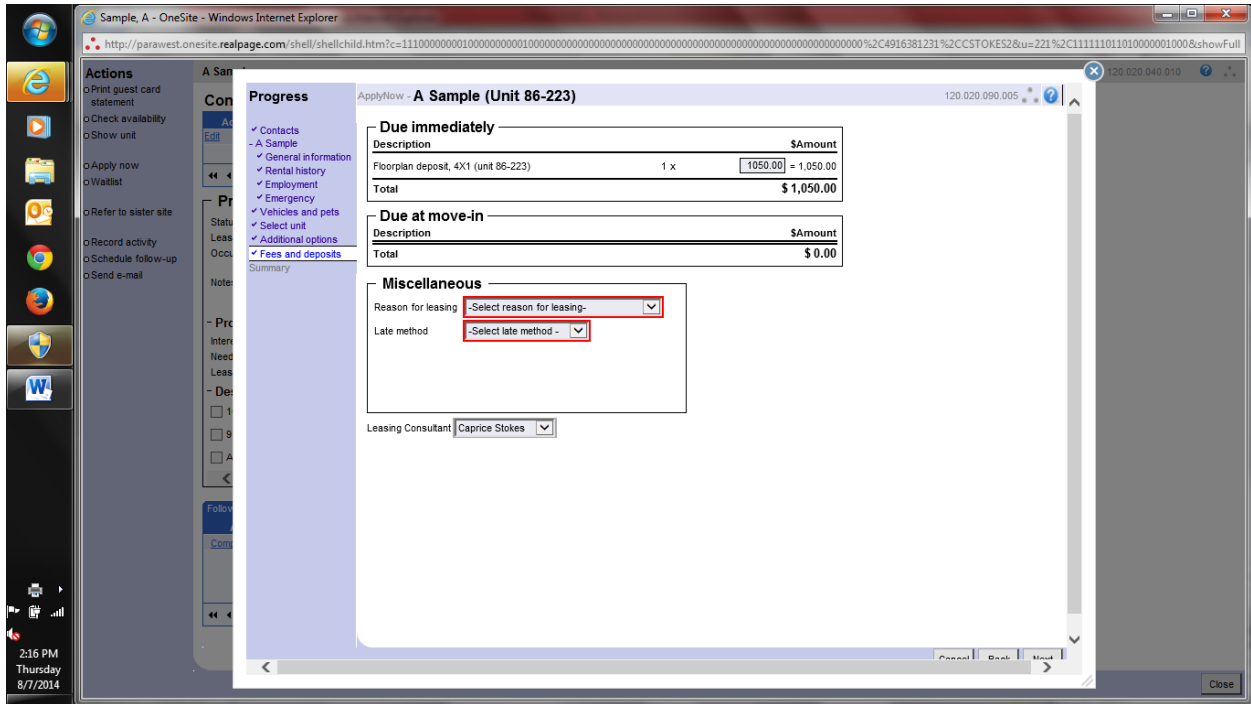


- You may get a WARNING screen. Manager's override this if all information is correct. Click Override, then Finish.





- Verify that deposit information is correct. Fill in red boxes, click next.

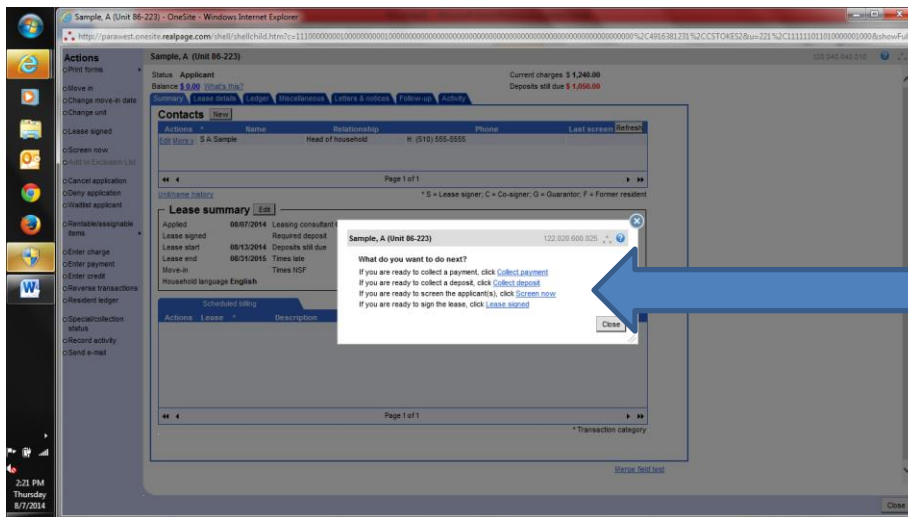


You have now successfully entered an application!!! 😊

### How to Screen an Applicant:

After the application process, the future resident moves into “Applicant” status. Going from prospect to applicant to screening the applicant is usually one process. The process has been divided here for training purposes.

- View applicant record, click screen now. Select applicants to screen. Initially, you will select all applicants for screening.



- Complete all information on Leasing Desk screens. Make sure to fill in all red boxes.

Sample, A (Unit 86-223) - OneSite screening -- Webpage Dialog

LEASINGDESK

A Sample Summary

**Applicant information**  
 Note: To ensure the most accurate check available, please include the full middle name.

Applicant Type: No Social Security Number

**Applicant Information**

First: A Middle: Training No Middle Name:  Last: Sample Suffix:

SSN / ITN:  Birth date: 12/08/1972 Gender: Female

**Current Address** [Clear address](#)

Country: United States Address1: 12345 Sample Street Address2:

City, State ZIP: Oakland CA - California 94605 Move-in:

**Contact Information**

Home phone: (510) 555-5555 Work phone:  E-mail: sample@yahoo.com

**Applicant Question(s)**

Has been evicted?  
 Has felony, sex-related crime, or misdemeanor assault conviction?

**Identification**  
 Note: A valid state-issued driver's license or ID is preferred.

Type: Driver's license Number: D5096588 State: CA - California

**Financial**

Rent: \$ 1,240.00 Monthly income: \$ 5,416.67 Other income: \$ 0.00

- Once all applicant information is entered, you will be able to “run” the applicants for credit and criminal records. Enter your Onesite password in the red box at the bottom of the screen. Press Enter.

Sample, A (Unit 86-223) - OneSite screening -- Webpage Dialog

LEASINGDESK

A Sample Summary

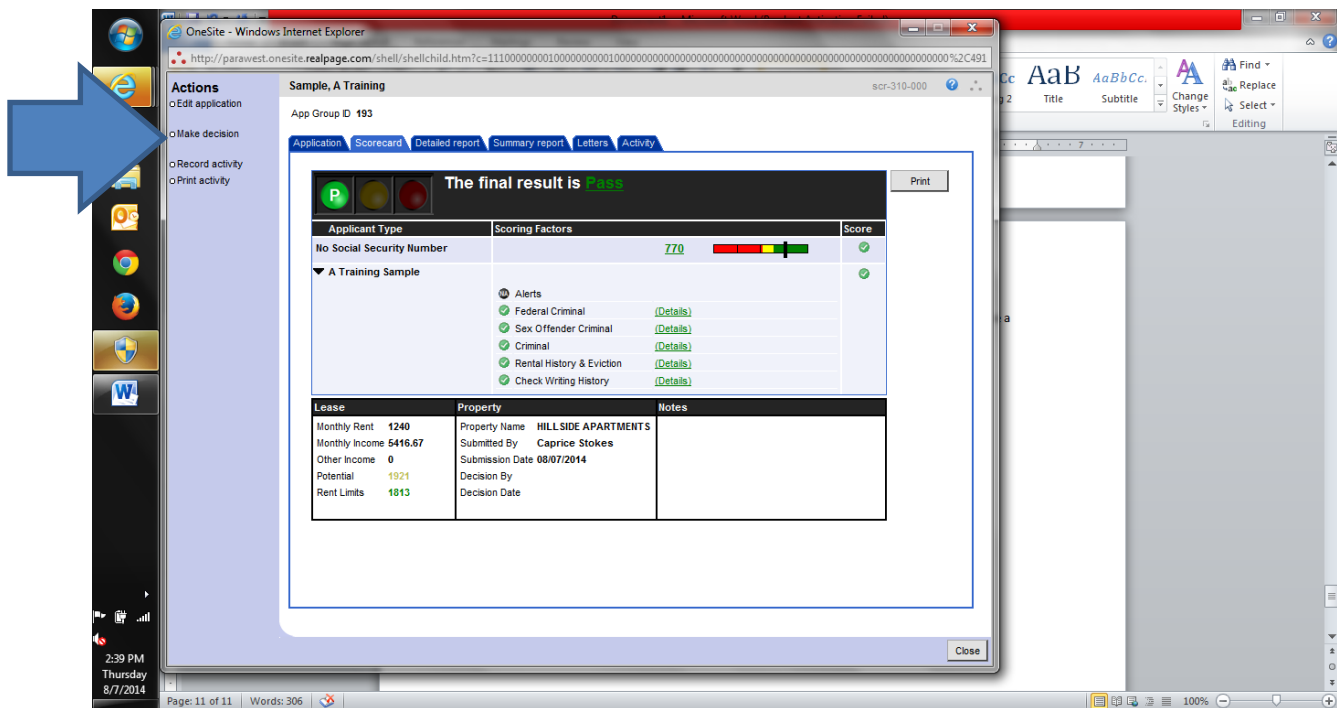
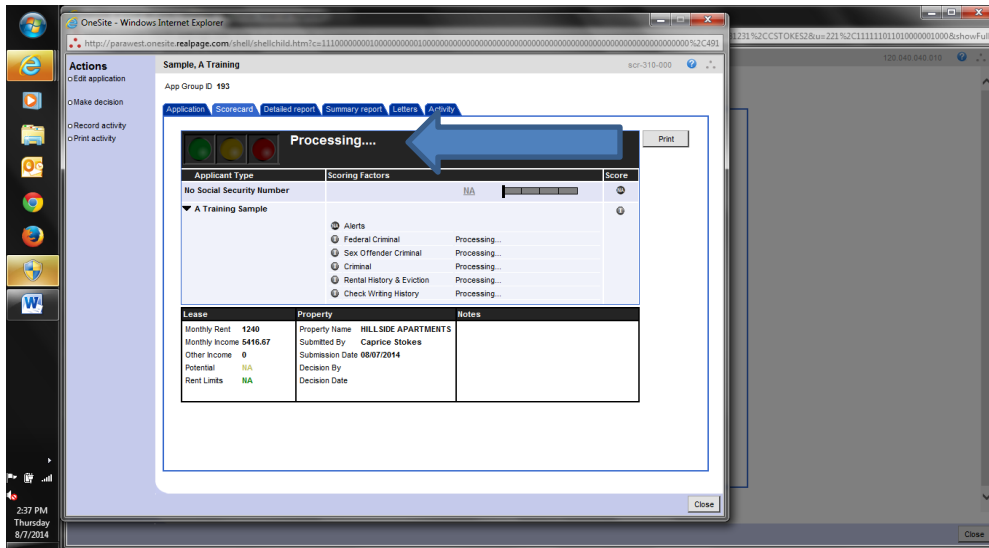
By ordering this consumer credit report, I am certifying to RealPage, Inc. that I have the written permission of an applicant for a rental agreement, that I understand what a permissible purpose for requesting a consumer credit report is pursuant to the Fair Credit Reporting Act and the Screening Agreement with RealPage, Inc., that I have a permissible purpose for requesting this report, and that I understand the FCRA provides that "Any person who knowingly and willfully obtains information on a consumer from a consumer reporting agency under false pretenses shall be fined under title 18, United States Code, imprisoned for not more than 2 years, or both."

Name	Birth date	Gender	SSN/ITN/Gov.	Issued ID	Address	City, State and Zip	Previous Address	Evicted?	Criminal?	Resubmit Credit?
A Training Sample	12/08/1972	Female			12345 Sample St	Oakland, CA 94605	Previous Address	No	No	N/A

Page 1 of 1

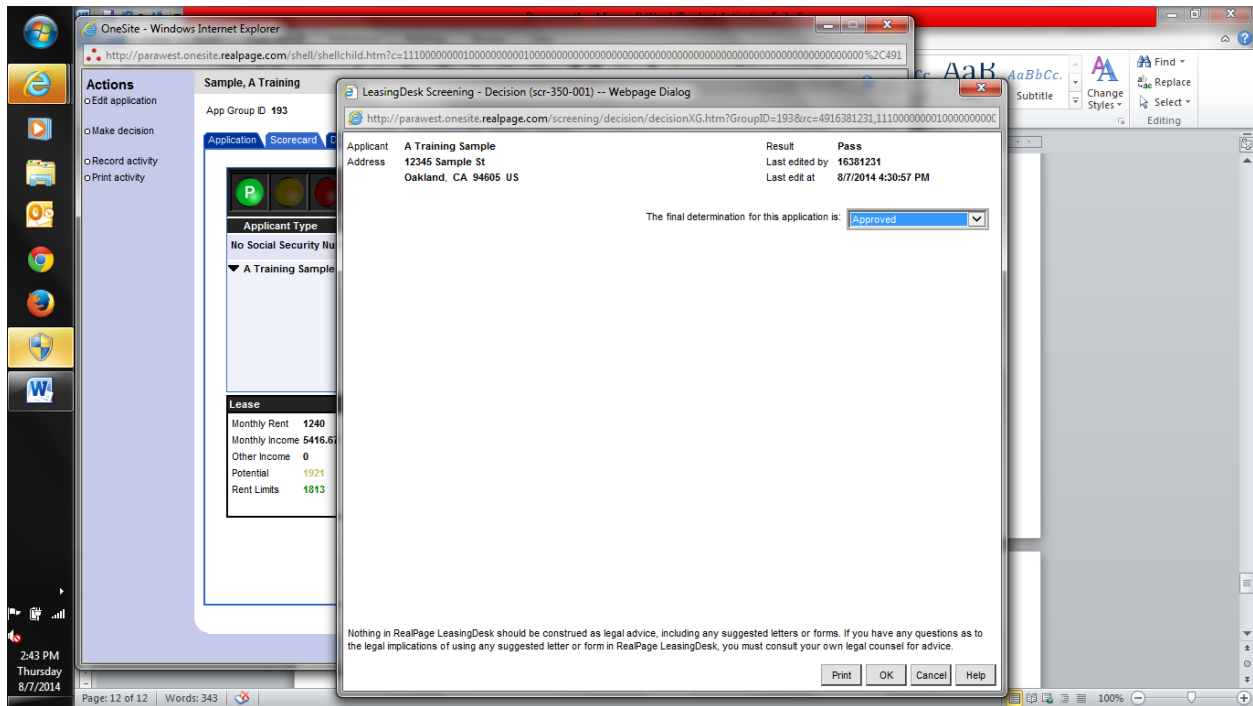
The above information is correct  
 Release form is signed by applicant  
 Password:

- You will get a “processing” screen. Once the processing is complete, Leasing Desk will give a leasing score and a suggested result.



- Choose to either edit application, make a decision, report activity or print activity. Then click close.

- If you choose to make a decision, a new screen will appear that will offer decision choices.



You have successfully entered and screened and made a decision on an applicant! Congratulations!



## How to Cancel/Deny an Application:

- View Applicant Record. Once approved, applicant becomes a resident. Click **deny application** or **cancel application**. Complete fields.

REALPACe HILLSIDE APARTMENTS

Administration • Setup • Learning

OneSite Today Prospects Applicants Residents Reports, SDE and Tasks

New prospect Available units Find person Calculator Ledger Accounting Caprice Stokes / Sign off

Residents - this is your start page

res-001-001

Actions	Unit	Last name	First name	Phone	Move in	start	end	Move out	Balance	HH	CS	status
<a href="#">View More</a>	86-223	Sample	A	H: (510) 555-5555	08/13/2014	08/13/2014	08/31/2015		\$0.00	H	S	Approved final

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Name A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

Unit/name history

2:52 PM Thursday 8/7/2014

Sample, A (Unit 86-223)

Status Applicant Current charges \$ 1,240.00

Balance \$ 0.00 Deposits still due \$ 1,050.00

Summary Lease details Ledger Miscellaneous Letters & notices Follow-up Activity

Actions New

Actions	Name	Relationship	Phone	Last screen	Refresh
<a href="#">Edit More</a>	SA Training Sample	Head of household	H: (510) 555-5555	Approved final	

Page 1 of 1

Unit/name history \* S = Lease signer; C = Co-signer; G = Guarantor; F = Former resident

Lease summary Edit

Applied	08/07/2014	Leasing consultant	Caprice Stokes	Credit approved by
Lease signed		Required deposit	\$ 1,050.00	Lease approved by
Lease start	08/13/2014	Deposits still due	\$ 1,050.00	
Lease end	08/31/2015	Times late	0	
Move-in		Times NSF	0	
Household language English				

Scheduled billing Print New-current Rent item Current

Actions	Lease	Description	Amount	Freq	P	Start date	End date	Last billed	Next due
No items									

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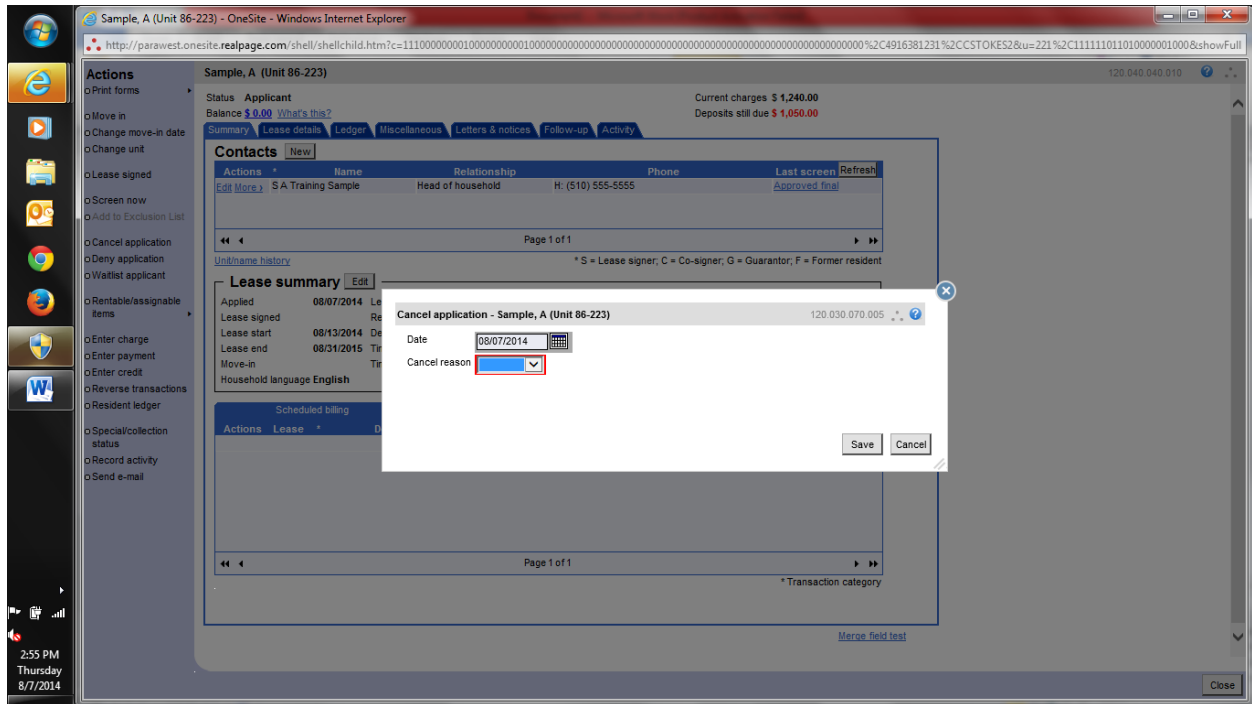
\* Transaction category

2:54 PM Thursday 8/7/2014

http://paravest.onsite.realpage.com/rents/new\_resident/residentsummary/summarytab.htm?cc=4916381231,11100...

Close

- Enter reason for cancel, then click save. Note: Deny application should be used for persons who fail screening.



You have successfully Canceled/denied an application! Awesome!!



## How to Enter a Transfer Request:

- View resident record. Click Move Outs/Transfers. Click **transfer request**, click **new quote**. Select new unit for resident. Follow exact steps you would for applicant.

Sample, A (Unit 86-223)

Status: Current resident  
 Current charges: \$ 1,240.00  
 Balance: \$ 1,033.00  
 Deposits still due: \$ 1,050.00

Balance is due

Summary | Lease details | Ledger | Miscellaneous | Letters & notices | Follow-up | Activity

**Contacts** New

Actions	Name	Relationship	Phone	Last screen	Refresh
<a href="#">Edit</a> <a href="#">More</a>	S A Training Sample	Head of household	H: (510) 555-5555	Approved	final

Page 1 of 1

Unlink name history \* S = Lease signer, C = Co-signer, G = Guarantor, F = Former resident

**Lease summary** Edit

Applied	08/07/2014	Leasing consultant Caprice Stokes	Credit approved by
Lease signed	08/07/2014	Required deposit \$ 1,050.00	Lease approved by
Lease start	08/07/2014	Deposits still due \$ 1,050.00	
Lease end	08/31/2015	Times late	0
Move-in	08/07/2014	Times NSF	0

Household language English

Scheduled billing

Actions	Lease	Description	Amount	Freq	P	Start date	End date	Last billed	Next due
<a href="#">Edit</a> <a href="#">Delete</a>	259	CA Rent	\$1,240.00	Monthly	✓	08/07/2014	12/31/2099	08/07/2014	09/01/2014

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\* Transaction category

3:41 PM Thursday 8/7/2014

Sample, A (Unit 86-223)

Status: Current resident  
 Current charges: \$ 1,240.00  
 Balance: \$ 1,033.00  
 Deposits still due: \$ 1,050.00

Balance is due

Summary | Lease details | Ledger | Miscellaneous | Letters & notices | Follow-up | Activity

**Move outs/transfers**

- Transfer request
- Undo transfer
- Give notice
- Move out

Sample, A (Unit 86-223)

Status: Current resident  
 Current charges: \$ 1,240.00  
 Balance: \$ 1,033.00  
 Deposits still due: \$ 1,050.00

Summary | Lease details | Ledger | Miscellaneous | Letters & notices | Follow-up | Activity

**Contacts** New

Actions	Name	Relationship	Phone	Last screen	Refresh
<a href="#">Edit</a> <a href="#">More</a>	S A Training Sample	Head of household	H: (510) 555-5555	Approved	final

Page 1 of 1

Unlink name history \* S = Lease signer, C = Co-signer, G = Guarantor, F = Former resident

**Lease summary** Edit

Applied	08/07/2014	Leasing consultant Caprice Stokes	Credit approved by
Lease signed	08/07/2014	Required deposit \$ 1,050.00	Lease approved by
Lease start	08/07/2014	Deposits still due \$ 1,050.00	
Lease end	08/31/2015	Times late	0
Move-in	08/07/2014	Times NSF	0

Household language English

Scheduled billing

Actions	Lease	Description	Amount	Freq	P	Start date	End date	Last billed	Next due
<a href="#">Edit</a> <a href="#">Delete</a>	259	CA Rent	\$1,240.00	Monthly	✓	08/07/2014	12/31/2099	08/07/2014	09/01/2014

Page 1 of 1

\* Transaction category

3:42 PM Thursday 8/7/2014

Sample, A (Unit 86-223) - OneSite - Windows Internet Explorer

Progress: Transfer application - Sample, A (Unit 86-223) 120.040.060.040

1 Select unit

2 **Select unit** [New quote](#)

Action	Unit	Status	Quote price	Lease start	Lease end	Waitlist count
<input type="radio"/>	86-223	Leased	\$1240.00	08/13/2014	08/31/2015	

Page 1 of 1

To view the quote, please click the rent amount link.

Cancel Next

Sample, A (Unit 86-223) - OneSite - Windows Internet Explorer

Available units - Sample, A 120.020.015.005

Prospect preferences

Interested in:  Price desired:  Pets:   
 Needed by:  Floor plan:  Unit:   
 Lease term:  Desired floor:

Desired features

10 ft. Ceiling  Cable available  Conference/Meeting room  Entertainment center  Icer  
 9 ft. ceiling  Cathedral/vaulted ceiling  Controlled building access  Fireplace  Indt  
 Access gate  Ceiling fan guest bedroom  Corner unit  Fitness center  ISDI

Units available  # of units: 20

Actions	Unit	Status	Available in	Date ready for move-in	Specials	Floor plan	Desired features	Beds/baths	Size	Deposit	Offer price	Add'l info
<a href="#">Quote</a>	<a href="#">85-103</a>	Vacant ready	11/07/2013	Ready	2	3X1	<a href="#">Features</a>	2/2.5	950	945	1150	
<a href="#">Quote</a>	<a href="#">85-217</a>	Vacant ready	10/04/2013	Ready	2	STU	<a href="#">Features</a>	0/1	700	700	755	
<a href="#">Quote</a>	<a href="#">87-208</a>	Vacant ready	07/01/2014	Ready	2	3X2	<a href="#">Features</a>	3/2	950	945	1195	
<a href="#">Quote</a>	<a href="#">85-209</a>	Vacant not ...	07/11/2014	07/19/2014	2	1X1	<a href="#">Features</a>	1/1	750	770	825	
<a href="#">Quote</a>	<a href="#">87-205</a>	Vacant not ...	07/30/2014	08/06/2014	2	1X1	<a href="#">Features</a>	1/1	750	770	825	
<a href="#">Quote</a>	<a href="#">87-206</a>	Vacant not ...	07/29/2014	08/06/2014	2	1X1	<a href="#">Features</a>	1/1	750	770	825	
<a href="#">Quote</a>	<a href="#">87-122</a>	Vacant not ...	08/04/2014	08/09/2014	2	1X1	<a href="#">Features</a>	1/1	750	770	825	
<a href="#">Quote</a>	<a href="#">85-208</a>	Vacant not ...	07/01/2014	07/04/2014	2	3X1	<a href="#">Features</a>	2/2.5	950	945	1150	
<a href="#">Quote</a>	<a href="#">85-114</a>	Vacant not ...	08/22/2013	12/01/2013	2	3X1	<a href="#">Features</a>	2/2.5	950	945	1150	
<a href="#">Quote</a>	<a href="#">85-207</a>	Vacant not ...	12/03/2013	12/10/2013	2	1X1	<a href="#">Features</a>	1/1	750	770	825	

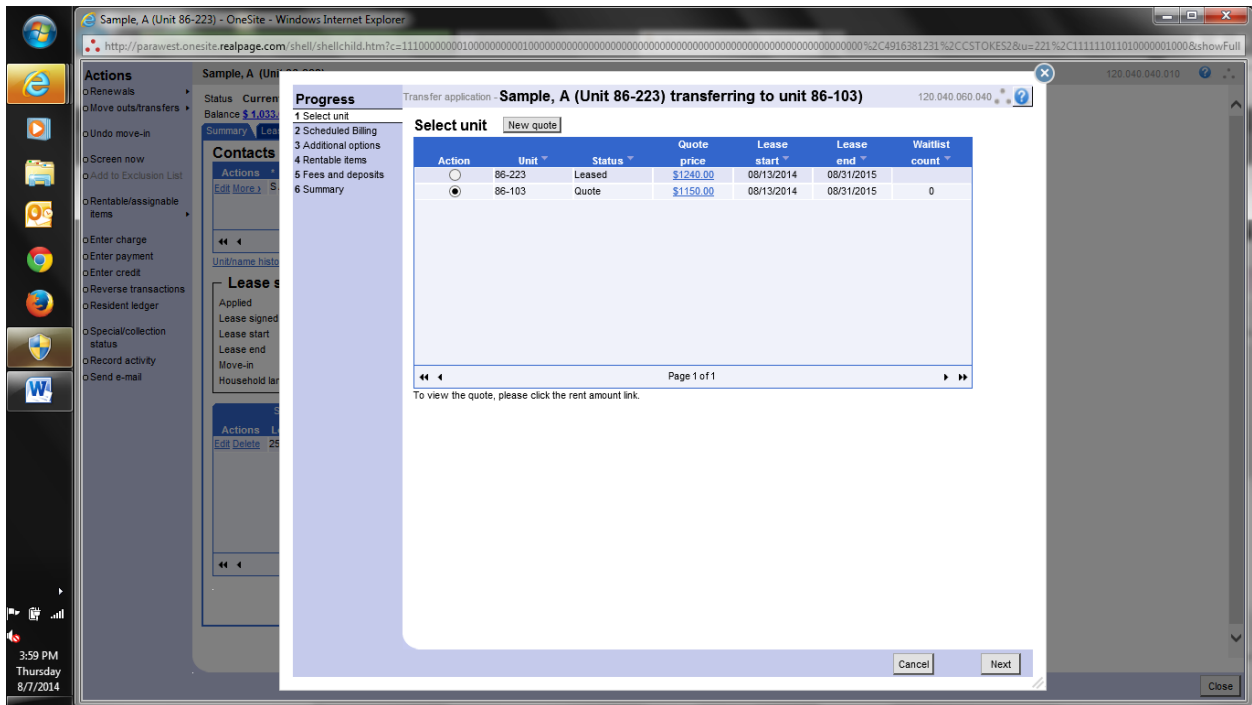
Page 1 of 2 1 2

Units matching waitlist

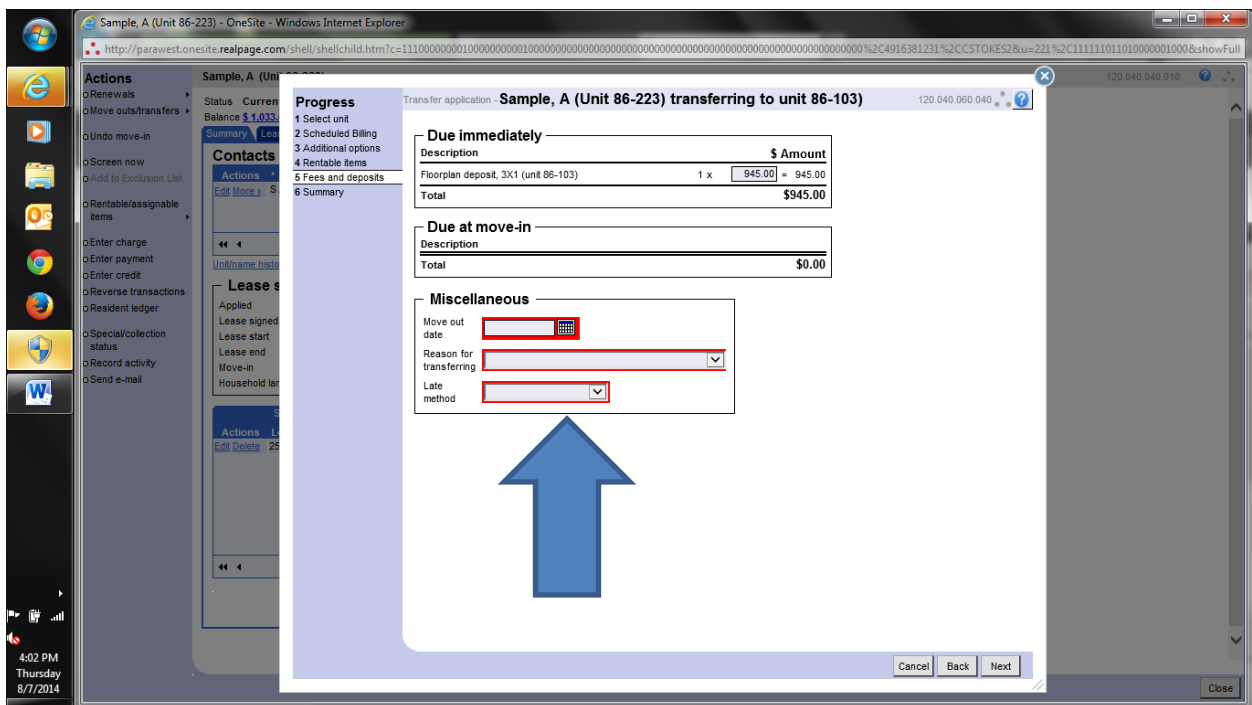
\*Legend: M= mobility, H= hearing, V= vision, D= death

Close





- Verify scheduled billing. Click **next**. Go through all screens just like you did initially with the applicant. At final screen, make sure all red box items are complete.



You have successfully transferred a resident to another unit. You've GOT this!!



## How to Give Notice to Vacate:

- View resident record, click **move outs/transfers**, click **give notice**, complete relevant information, click save.

The screenshot shows the 'Sample, A (Unit 86-223)' resident record page. The 'Move outs/transfers' menu is open, showing options: Transfer request, Undo transfer, Give notice, and Move out. The 'Give notice' option is highlighted. Below the menu, the resident's details are visible: Status: Current resident, Current charges: \$1,240.00, Deposits still due: \$1,050.00. A table shows the resident's relationship as 'Head of household' with phone number '(510) 555-5555'. The 'Lease summary' section shows the lease start date as 08/07/2014 and end date as 08/31/2015. The 'Scheduled billing' table shows a monthly rent of \$1,240.00.

The screenshot shows the 'Give notice - Sample, A (Unit 86-223)' dialog box. The dialog prompts the user to 'Enter and confirm the information below and click [Save]'. The 'Lease end' date is 08/31/2015. The 'Notice given on' date is 08/07/2014, and the 'Notice given for' date is 08/11/2014. The 'Category of move' is 'All' and the 'Reason for move' is 'Moving home'. The 'Expected ready-for-move-in date' is 08/19/2014 with 'Turn days: 5'. The 'Forwarding address' is 'MANSU'. The 'Early termination fee' is \$0.00 and the 'Insufficient notice fees' are \$0.00. The dialog has 'Save' and 'Cancel' buttons.

- Once resident is placed on notice, resident record should read **pending m/o**.

The screenshot shows the REALPAGE software interface for 'HILLSIDE APARTMENTS'. The 'Residents' tab is active, and a search for 'sample' has been performed. The results table shows one resident record:

Actions	Unit	Last name	First name	Phone	Move in	start	end	Move out	Balance	HH	CS	Lease status
<a href="#">View More</a>	86-223	Sample	A	H: (510) 555-5555	08/07/2014	08/07/2014	08/31/2015	08/07/2014	\$1,033.00	H	S	Pending MO

A blue arrow points to the 'Pending MO' status in the 'Lease status' column.

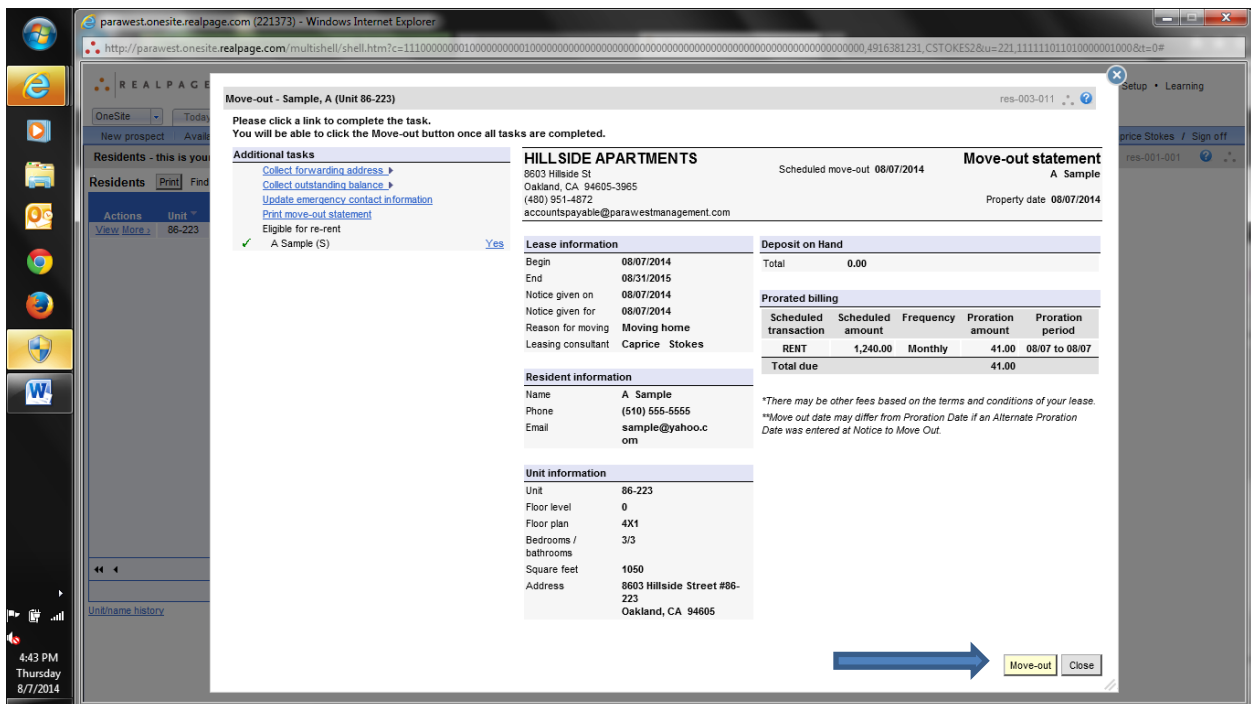
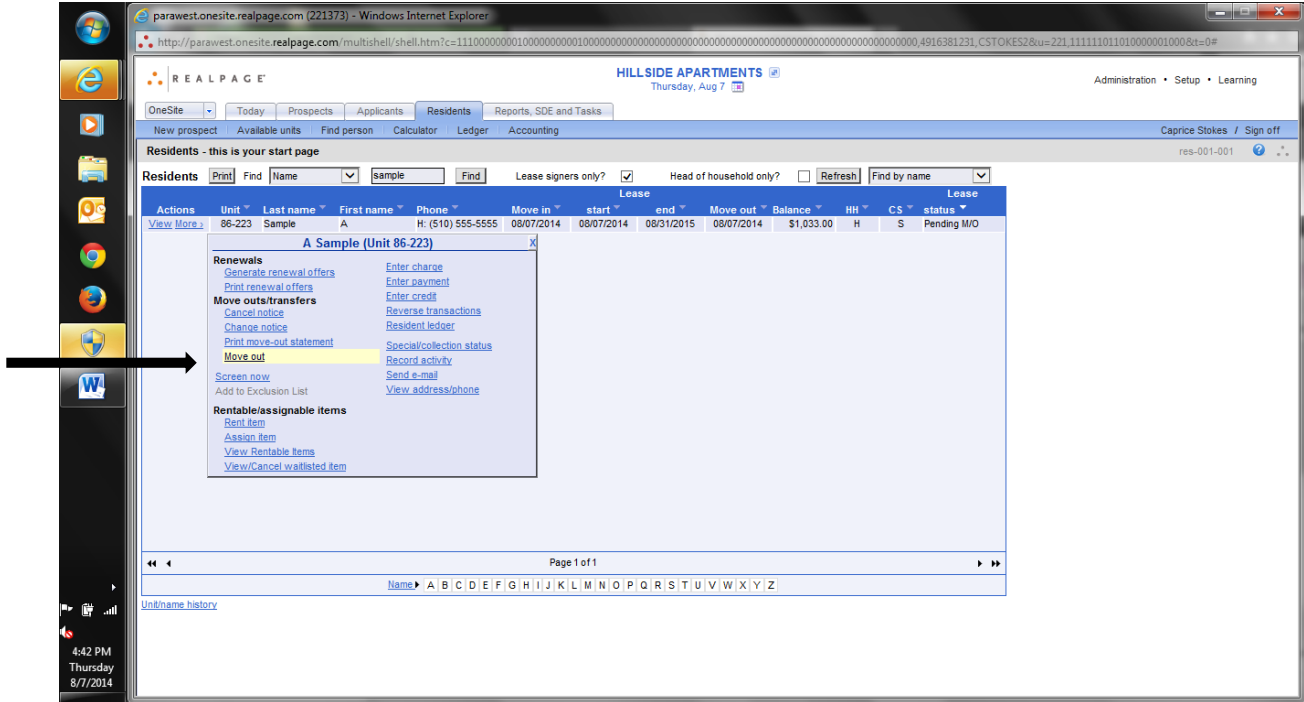
You have successfully entered a notice to vacate! You've got the hang of it!!



### How to Complete a Move Out-Close Account and Generate a Final Account Statement (FAS):

- View resident record, click **move outs/transfers**, click **move out**, complete required tasks, click **move out**.

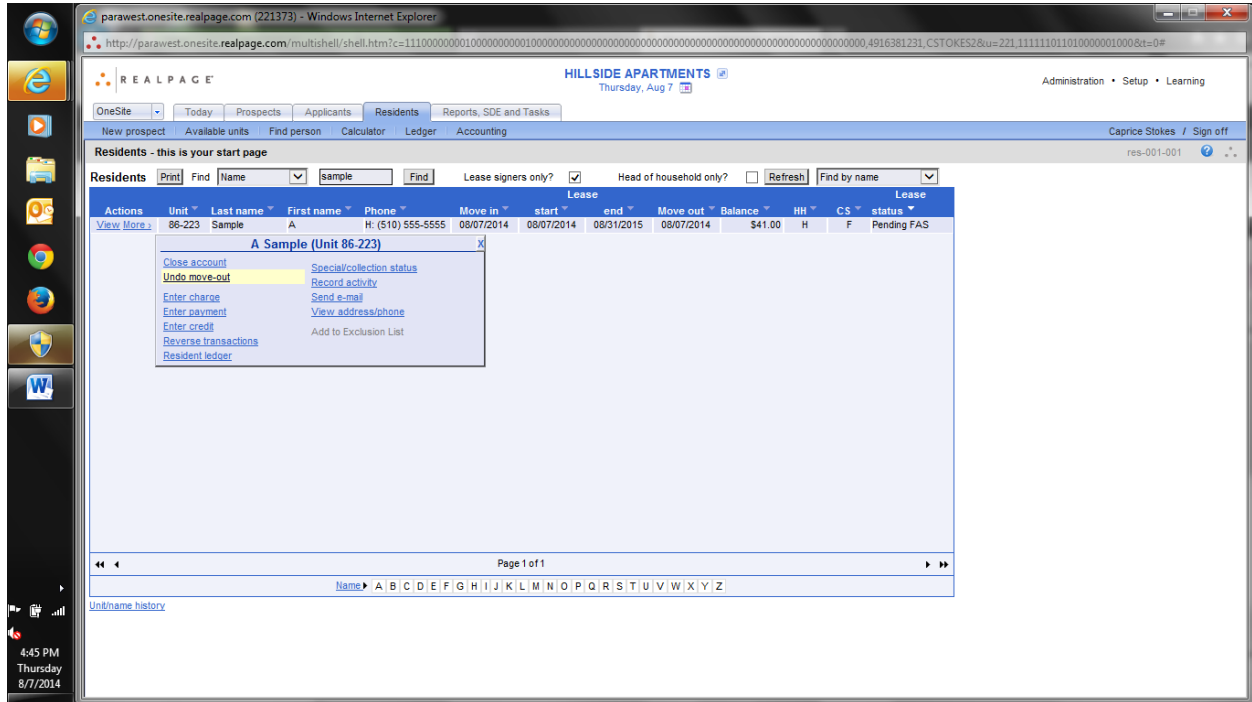
- To close account, move resident out at resident record screen, click **close account**, click **close**, complete fields, click **next**, complete charges (PW managers **do not** enter charges on this screen. Refer to move out procedures packet provided by facilitator), click **next**, review final account statement. Make sure amount at bottom is zeroed out, click **print**, click **finish**.





## How to Undo a Move Out:

- Do all steps for how to complete a move out. At resident record screen, you will click **more**, click **undo move out**



## How to Print a Move Out Statement:

- View resident record, click **print forms**, click **print move out statement**, click **print**, click **close**.

The next series of Onsite instruction focuses on accounting functions. RealPage Onsite does have its own accounting software and if utilized in conjunction with RealPage Onsite operations management software can be an extremely effective tool for financial and operations reporting. There are instances however when the operations and accounting software are different. Information is then “pulled” from Onsite via reports and entered into another application. For the purposes of this training, the focus will be how to manage and navigate RealPage Onsite so that information is easily entered into other software.

How to Post Scheduled Billing: Scheduled billing is a function that the site manager does to post the new months rent to all residents at the same time.

- Click **administration** tab
- On the left hand side under **leasing and rents**, click **other**
- Click **post scheduled billing**, click **preview**, review report for accuracy, click **post**, click **post**

Give live demonstration of this, as scheduled billing has already been completed for the month.

#### **How to Enter a Payment:**

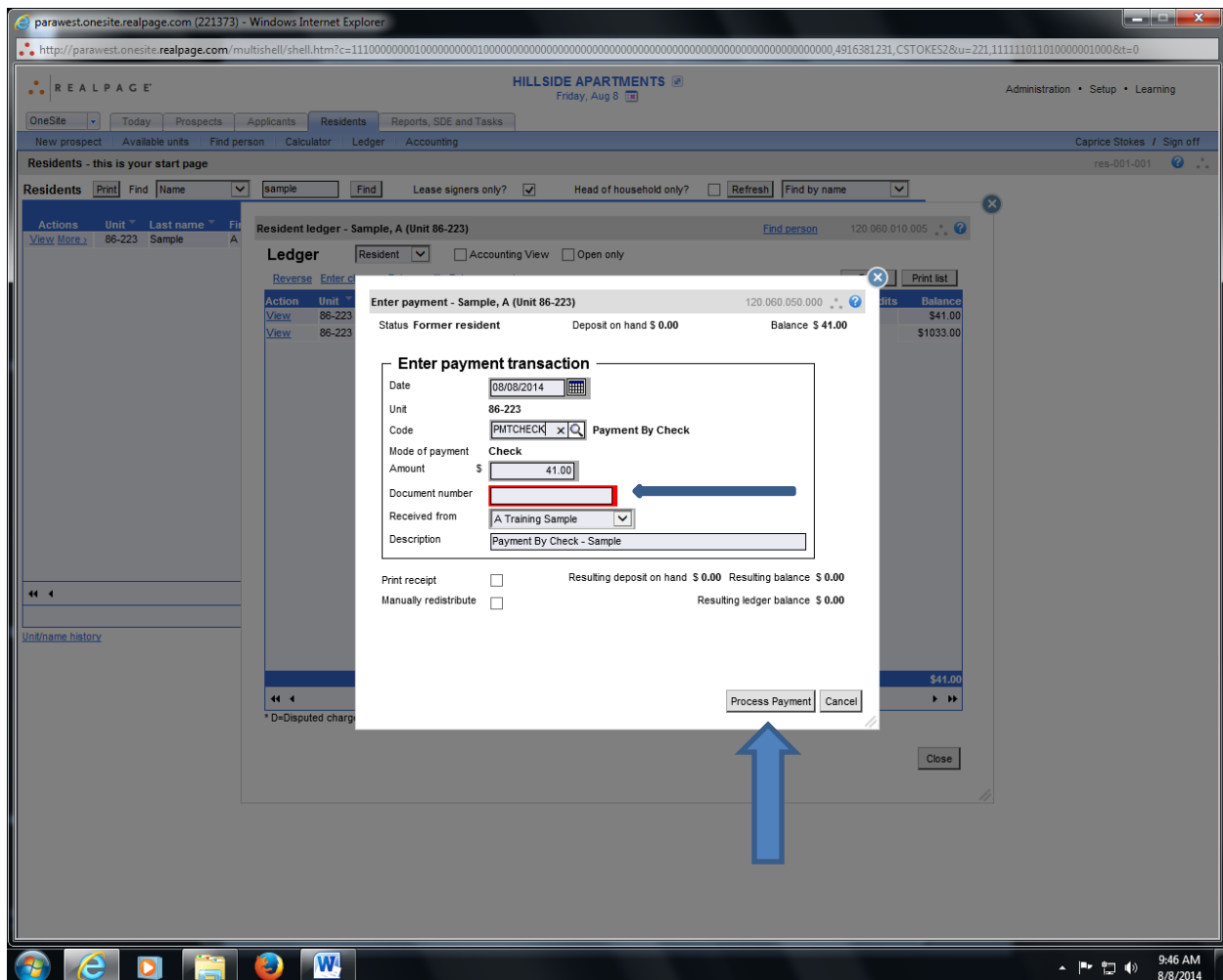
- View applicant or resident record
- Click **ledger** tab
- Click **enter payment**
- Enter information, click **post**

Note: Only basic screen shots can be done for this, any money entered (even for example purposes) will affect/record on the AME reports. Give live example of how to enter and edit payments.









### How to Edit a Payment:

- View applicant or resident record, click **ledger** tab
- Locate payment to be edited
- On the far left, click **view** for payment to be edited, click **edit**
- Complete fields, click **post**

### How to Reverse a Payment:

- View applicant or resident record, click **ledger** tab
- Click **view** for payment to edit, click **reverse**
- Enter information, click **post**

Note, Reversing a payment can only be done with permission from the Area Director.

You have successfully entered, edited and reversed payments!!! You GO!!



At this point, you may have realized that Onesite is extremely user friendly and that all functions completed in Onesite follow very similar paths. We will do exercises in live Onesite examples which include:

- Posting /Changing Security Deposits
- Posting Quick/Subsidy/Misc. Payments
- Post/Reversing and NSF
- Repaying an NSF
- Closing Bank Deposits
- Editing Accounts after Close Account

**CONGRATULATIONS!! YOU ARE  
NOW ONESITE SUPER-SMART!!**