


Data Migration Questionnaire

1. What month would you like the program to begin rent charges for your tenants?

2. What day do you charge rent (mark option)?
 - ____ All tenants are due on the ____ day of the month. (usually the 1st)
 - ____ All tenants due on the anniversary of their move-in date each month

3. When is rent considered late for your tenants?

4. Define your tenant late fee structure:

 **Late Fee Settings**
The system will automatically generate the following late fees once the tenant's grace period has expired. Check the box to enable the fee. Both fees may be simultaneously enabled which will cause the daily fee to begin incurring on the day following the recurring fee.

Recurring Late Fee \$ or % of overdue
Once per frequency fee assessed on the day following the grace period. The frequency is set at move-in and is either weekly, bi-weekly, or monthly.

Daily Late Fee \$ Max \$
This charge will post daily until the tenant's balance is positive. Specify a max amount to define a monthly cap on maximum late fee.

5. How many days before rent is due would you like to rent charges to post in the tenant's ledger?

6. Tenant Statements and Invoices contain a "Payable to:" option. Would you like this option to show the property owner's name or your name?

7. Will you be using one default expense account to document all expense for your properties?
If yes, indicate what you would like this account to be called (Example: General Operating.)

8. Will you be using one default income account to document all rental income received in the program?
If yes, please indicate what you would like this account to be called (Note: you can use the same account for income as expense in the program if that is your policy.) If left empty, the standard income account will be "Undeposited Funds".

9. Define your management fee structures, if any:

Management Fees <i>(charged at the time rent is posted or collected from tenant)</i>	
Category	6100 Management Fees ▼
Flat Rate	<input type="checkbox"/> <input type="text"/>
Percentage of Tenant Payments	<input type="checkbox"/> <input type="text"/> %
Percentage of Charged Rent	<input type="checkbox"/> <input type="text"/> % Not less than: \$ <input type="text"/> Not to exceed: \$ <input type="text"/>
<hr/>	
Placement Fees <i>(charged upon moving in a new tenant)</i>	
Category	6150 Commissions ▼
Placement fee	<input type="checkbox"/> <input type="text"/>
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Reserve <i>(for reporting and distribution purposes)</i>	
Property Reserve	<input type="checkbox"/> <input type="text"/>