Rental Property Manager 2

User Manual

Copyright © 2008, Source IT. All rights reserved.

Source IT

705 Pakowhai Rd

Hastings

NEW ZEALAND

http://www.sourceitsoftware.com

sales@souceitsoftware.com

support@sourceitsoftware.com

Table Of Contents

Introduction to RPM

Welcome to Rental Property Manager

Rental Property Manager (RPM) is a one-stop database for managing your rental property information. RPM is designed by a property manager to meet your unique needs. It is for real estate professionals and private property investors alike.

Using RPM, you can save and manage data about your properties, tenants, and financial transactions. RPM includes advanced reporting functions that create spreadsheets with the rental information you need.

Is your property portfolio residential, commercial, rural, or varied? Do you have two or three properties, or two or three hundred? RPM can grow with your portfolio. It provides the following functions:

- Manage data about every property, including:
    - Complete data
    - Specific notes, including a property log and photographs
    - Detailed, customizable lists of assets and property dimensions
    - Full Inspection records, including digital photos of your property
- Manage data about your tenants, including:
    - Detailed tenant and tenancy data, including scans and images
    - Link tenants to properties
    - View tenants' current rent, amount owing, and upcoming payments
- Record and report on financial data for your properties, including:
    - Income
    - Expenditures
- Automatic Calculate Rents function provides fast updates of who owes you rent
- RPM Planner provides an event calendar for scheduling property inspections and other events
- RPM Contacts now provides details of non-tenant contacts - record cleaners, builders, local councils, and other service providers
- Create reports with practical information about your properties, tenants, assets, expenditures, and more

Some people may be using the trial version of Rental Property Manager. The trial version will only provide functions for 30 days. Ordering a full license takes care of this and gives you full functionality, providing you with official tech support. It's a small investment to help you manage your larger ones.

What's New in RPM 2

Here is important and useful new functionality we have developed for Rental Property Manager 2. Users can now access and benefit from the following:

Property and Tenants

- Tenant data now uses Active/Inactive rather than tenancy end date
- Contacts for properties, tenants, etc.
- Send emails to Contacts and Tenants
- Add and edit Photos for Properties, Tenants and Contacts
- Event logs for Properties, Tenants and Contacts
- Tenant Details report

Financial Data

- Enter recurring income and expenses
- Customisable list of default fees
- Create late fees
- Create custom fees
- Pro rate initial rent
- Add income, monies due, or payments
- Customisable Income categories with taxable/Non taxable sections
- Customisable Expense categories with depreciable/non depreciable sections
- Mark multiple tenants as paid
- Invoices and receipts now show the current balance outstanding
- All financial reports use taxable/depreciable categories
- All financial reports ask for a date range
- Rents now calculate one rent period into the future
- Note chargeable expenses

General Improvements

- Password protection for databases
- Database is now faster and more robust
- User interface is redesigned
- Search/Filter functions are simplified
- Users can create more custom fields

Reports

- Multiple new reports
- Report editing is easier and more comprehensive
- Reports can now be exported to the following formats and more: PDF, HTML, Excel files, and emails.

Terms Used in RPM

The following list is real estate terms and how they are used in RPM.

Asset	An item, appliance, or space (such as parking) that adds to a property's value.
Contact	A person or business, not a Tenant, who is involved with your properties.
Database	A group of linked files that saves your RPM information.
Dimension	A space within or related to the property, such as a room, an office, a deck, or a garage.
Event	Something related to a property that is noted to take place on a certain date and time. RPM can list events and give you reminders about events.
Expense	A cost or payment for an item or repair related to a property.
Income	Rent or other money paid by a Tenant for the use or occupation of a Property.
Inspection	The act of reviewing a property's physical condition before or after a tenant occupies the property.
Invoice	A document informing a person of payments due or in arrears.
Logs	Detailed records of activities with a tenant, property, or contact.
Property	A building or space that you own and rent or lease to Tenants.
Receipt	A document confirming that a person has made a payment to you.
Recurring	An expense or income payment that repeats on a regular basis.
Rent	Money paid by Tenants for renting or leasing a property.
Rent Rate	The amount of money to be paid in rent for each Rent Period.
Rent Period	The increments of time for which rent is to be paid, i.e., weekly, monthly.
Report	An RPM Report lists specific data as a reference for you.
Tenant	A person who is renting your property, or a space or unit within your property.

Getting Started in RPM

Setting Up and Using RPM for New Users

Are you setting up RPM for the first time? Enter your data into RPM in the order below.

1. The first thing you need to do is create a database. This provides a foundation for saving your Property data.

2. Once you have set up a Database, review the Options. Make changes to the Options to meet your requirements.

3. Once the Options are set up to meet your needs, you can enter Property data. Your information about tenants, income, and expenditures are all linked to Properties. It is helpful to collect all your Property data before you begin data entry.

4. Enter the main Property details, then note Property assets, dimensions, and inspection results and photographs.

5. Now you can add Tenants, Expenses, Contacts, and Income, and use the Reports. The Reports increase in value the more you use RPM.

Take some time every day, week, or month to update your RPM data. Use the Planner to schedule events, and Contacts to keep track of your service providers. Back up your databases.

RPM is as intelligent and useful as you make it - use your software investment to get the most out of your property investment.

Setting Up Default Options

Before you start to use RPM, you should set up Options. Options provide customized data for you to select when you create Properties, Planners, Assets, Dimensions, and Categories. The values you enter here appear in drop-down menus for you. In addition, Options also enable default functions, especially regarding rent payments and overdue notices.

Instructions

1. In the **Tools** menu, click **Options**.
2. The **Options screen** displays.
3. There are value tabs in the Options screen. To open a tab, click on its name in the Options screen sidebar. In each tab, you can set up RPM option values for the following areas. Click the item to view the Options values:

- General
- Planner
- Custom Fields
- Asset Categories
- Dimension Categories
- Inspection Categories
- Other Categories
- Invoice Layout
- Receipt Layout
- Default Fees

4. Enter data into the data fields. For some items, you may need to select a related Category, or click a check box to activate or deactivate an option. See the table below for definitions of the Options values.
5. For the Asset, Dimension, Inspection Category, and Other Category tabs, you can enter and delete items. Use the **Add Category** button to add a new category. Use the **Delete Category** button to delete a category. For items in a category, use the **Add Item** and **Delete Item** buttons.
6. When you have finished entering the values you need, click **OK**.
7. The Options will be applied throughout RPM and are available for your use.

Options Screen Values

General Tab	
Calculate rent on startup	Check this box to have RPM perform this function.
Calculate rent in advance	Enter the number of days that RPM should use in advance rent calculations.
Flag tenant when overdue	Check this box to have RPM notify you when a tenant's payments are overdue.
Display usage tips	Check this box to have RPM display useful help tip messages automatically.
Reset Tips button	The tip messages rotate from 1 to 100. To start the messages displaying at message 1, click this button.
Show text on Toolbar buttons	Check this box to include text on toolbar buttons. If this is not checked, the toolbar buttons only display icons.
Defaults	This frame contains default values that are applied throughout RPM.
Rent Payment Period	Select a rent payment frequency from the drop-down menu. This will be applied as the default rent payment frequency for all new Tenants.
Rent payments in advance	Select a number for the standard weeks of rent in advance that you want as the default advance payment from Tenants.
Rent rate	Enter an average rent rate. This value is not required. Managers with many similar units may find this useful.
Financial Year	This frame contains the default value for entering the start date of your Financial Year.
Planner	
Show rent due dates in Planner	Check this box to display the dates when rents are due in the Planner.
Show rent due alarms	Check this box to display alarms for overdue rent.
Show unpaid rent alarms	Check this box to display alarms for rent that has not been paid.
Show	Enter the number of days after which alarms for unpaid rent will

alarm after X days.	display.
Show rent reviews in Planner	Check this box to display when rents should be reviewed in the Planner.
Show rent review alarms	Check this box to display alarms indicating that it is time to review rents.
First review due after	Enter the number of weeks that will pass before the first rent review.
Show inspections due in Planner	Check this box to display when inspections are due for properties in the Planner.
Show inspection alarms	Check this box to display alarms for overdue inspections.
Inspection due every	Enter the number of weeks that will pass between inspections. A year is 52 weeks; six months is 26 weeks.
Show tenancy end dates in Planner	Check this box to display when tenancies are due to end in the Planner.
Show tenancy end alarms	Check this box to display alarms for tenancies reaching their end.
Custom Fields - See the instructions for Creating Custom Fields.	
Asset Categories	
Category	Enter a general category of property Assets. Examples include: • Furnishing • Appliances • Parking
Asset for Category	Select an Asset Category from the drop-down menu, then enter specific assets for that Category. For example, for the asset Appliances, enter Dishwasher, Washing Machine, Dryer, Refrigerator, etc. If the asset will depreciate in value, check the Depreciable box.
Dimension Categories	
Category	Enter a general category for property Dimensions. Examples include: • Bedroom • Kitchen • Bathroom
Asset for	Select a Dimension Category from the drop-down menu, then enter

category	specific dimensions for that Category. For example, for the dimension Bedroom, enter Floors, Walls, Windows, Wardrobes, etc.
Inspection Categories	
Category	Enter a general category of Inspection category and Category Type. Items entered here will be used against properties being inspected. Examples include: • Bedroom 1 - type: Bedroom • Bathroom 1 - type: Bathroom • Parking Area - type: Outdoors
Category Type	Select an Inspection Category from the drop-down menu, then enter specific inspection items for that Category. For example, for the category Bedroom, note for inspection Closets, Light Fixtures, Walls, Windows, Floor, etc.
Other Categories	
Section	Select the Section where you want to add the new category: Contacts, Income, Expense, or Notes.
Category	To enter a new Category, click **Add** and then type the new Category name in this field.
Category List	This list shows all the active Categories for this Section. For Income and Expense, check the box if a category item is Taxable or Deductible. To delete a category, select it and click the **Delete** button.
Invoice Layout - see the instructions for Invoice and Receipt Layout.	
Receipt Layout - see the instructions for Invoice and Receipt Layout.	
Default Fees	
Late Fees	Late Fees are normally applied to late tenant rental payments. Each Late Fee has the following values: • Fee Type - Type of fee: daily, once only, or no fee. • Fee Amount - The amount of the fee. • Day Due - Enter the number of days after the original payment is due when this late fee is applied.
Custom Fees	To enter a new Custom Fee category, click **Add** and then type the new custom fee name. Each Custom Fee has the following values: • Name - Name of the Custom Fee. • Category - Select a fee category from the drop-down menu. • Fee - Fee amount.

Creating Custom Fields

You may want customized data categories to be included in your records. In RPM, you can create a limited number of customized data fields for your data. This is done from the Options screen, using the instructions below.

You can create text fields for word-based data, or number fields for numerical data.

Instructions

1. In the **Tools** menu, click **Options**.
2. The **Options screen** displays.
3. Click on the *Custom Fields* tab.
4. Select the data category for the Custom Field by selecting it from the **Section** drop-down menu. The options are:
   - **Contact**
   - **Expense**
   - **Income**
   - **Inspection**
   - **Property**
   - **Tenant**
5. Any custom fields you create will be added to the selected Section.
6. To activate a custom field, do the following:
   - For a text field, check one of the Show boxes to activate the custom item. Then enter the name of the field.
   - For a number field, check one of the Show boxes to activate the custom item. Then enter the name of the field.
   - Click **OK**.
5. The text and number fields you have added are activated in the specified Sections. They become active both in the item details for all items, and in the main screen grid display of the items.

Invoice and Receipt Layout

You can use RPM to generate invoices and receipts for your rentals. You can customize the text in the RPM generated invoices and receipts, using the Invoice Layout and Receipt Layout options.

An example of an RPM receipt is the following:

Instructions

1. In the **Tools** menu, click **Options**.
2. The **Options screen** displays.
3. Click on the *Invoice Layout* or the *Receipt Layout* tab.
4. You can enter and format additional invoice text. This text will be used for all invoices/receipts. You can enter and format text to appear in the following locations:

- Top Left
- Top Center
- Top Right
- Footer

   You can also format the official Title of the invoice/receipt.

5. To view an example of the invoice/receipt, click the **Preview** button. A Preview of the document displays.
6. If the Preview is suitable, click **Close**. You are returned to the **Options** screen.
7. Click **OK**. Your changes are saved. The format you have entered will be used for Invoices or Receipts.

The Recycle Bin and Deleted Data

To delete data in RPM, select a data item and click the **Delete** button .

The item is then deleted from the data screen and saved in the Recycle Bin.

The item stays in the Recycle Bin until you choose to delete it permanently, or to restore it. Restoring it replaces the item in the main database; it is "undeleted."

Restore Items

1. To restore a deleted item, open the **Recycle Bin** .

2. Select the item by clicking on its row. Select multiple items by clicking each one in its check box. OR, select All Items by clicking the **Select All** button .

3. Click **Restore Selected** . The selected item is removed from the Recycle Bin and returned to the main database.

Delete Items Permanently

1. To delete an item permanently, open the **Recycle Bin** .

2. Select the item by clicking on its row. Select multiple items by clicking each one in its check box. OR, select All Items by clicking the **Select All** button .

3. Click **Delete Selected** . The item is permanently deleted.

Navigation in RPM

RPM is easy to navigate. Its graphic user interface displays your property data clearly. To learn more about the areas of the RPM screens, review each of the following topics:

- Menus – see page 14
- Toolbars are described in each screen description. There is a Filter Toolbar that can be activated for all screens – see page 16.
- Screen Summary - review of all screens in RPM and their uses – see page 15
- Specific Screen Details are available for major screens:
    - Property Screen – page 17
    - Tenant Screen – page 31
    - Income Screen – page 36
    - Expenses Screen – page 42
    - Inspections Screen – page 28
    - Contacts Screen – page 44
    - Planner – page 47
    - Reports – page 51

Menus in RPM

RPM has a simple user interface. The Menus provide links to all screens and functions in RPM. Each Menu is shown below, with a list of its associated functions.
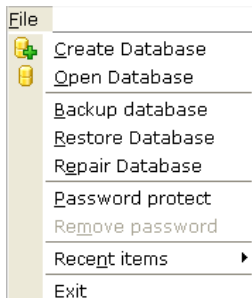
File Menu

Database Functions - see About Databases for a review of all functions.

Recent Items - Review a list of recently used databases.

Exit - Closes RPM.
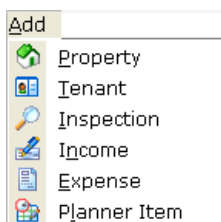
Add Menu

Click on each Section to add a new item to that section. See **Screens in RPM** for details.
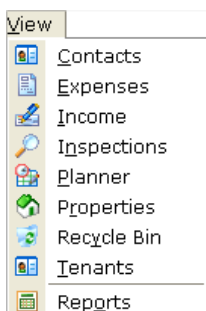
View Menu

Click on each Section to view the related screen or Toolbars. See **Screens in RPM** and **Search and Filter Data Screens** for details.
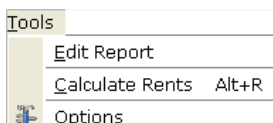
Tools Menu

Edit Report - Enables you to select and edit a Report.

Calculate Rents - Instantly calculates rents owed and due.

Options - Opens Options for editing.

Help Menu

Contents - Opens online help.

Buy Now - Link to the RPM purchase page.

Show Welcome Screen - Displays the RPM Welcome screen.

About - Opens your RPM user details, including the Version Number.

Screens in RPM

There are eight major function screens in RPM. These screens provide access to tasks and data for their function area. The main display includes a sidebar with buttons and the Menu bar. Move from one function screen to another by clicking the screen buttons, or use the View menu.

Each screen includes a Toolbar, with buttons for tasks, and one or more data tables.

HINT: The data tables in each screen can be sorted. Click on a column header to sort the table by the data in that column.

Tenants Screen

The Tenants screen is your center for Tenant data. The main data table lists the Tenants. When you select a Tenant, the information tabs at the bottom of the screen display that Tenant's data.

Properties Screen

The Properties screen is your center for property data. This is the default screen, and it provides access to all the major functions in RPM. The main data table lists the Properties. When you select a Tenant, the information tabs at the bottom of the screen display that Property's data.

Income Screen

The Income screen lists all received Income for all properties or a selected property. The bottom of the page has an Income total, summarizing Income due and Income paid.

Expenses Screen

The Expenses screen lists all Expenses for all properties or a selected property. The bottom of the page has an Expenses total.

Contacts Screen

The Contacts screen lists all the non-tenant Contacts you work with regarding your properties and rentals. When you select a Contact, the information tabs at the bottom of the screen display that Contact's data.

Planner Screen

The Planner provides a calendar where you can list visits and events relating to your properties and to your property maintenance. Set recurring events and event reminders, and view your property time commitments at a glance.

Inspections Screen

The Inspections screen lists inspections for properties. The main data table lists completed inspections.

Recycle Bin Screen

The Recycle Bin screen saves all RPM data that has been Deleted. Restore or finalize data deletion from this screen.

Reports Viewer

The Reports Viewer displays when you select a Report. It includes the requested Report and navigation tools for the report.

Search and Filter Data Screens

When you have many records, you may need to search them. To do this, you can use the Filter Toolbar.

In all screens, you can filter on data columns, and even create a custom filter for a data column.

View the Filter Toolbar

1. The Filter Toolbar always displays at the top of each screen.

2. To do a simple Search, type a word or number in the **Filter** field. Or, select an item automatically from the drop-down menu of data.

4. RPM will highlight all the records on a screen that include the term or the selected search item.

Filter on Columns

1. Open the Screen.
2. Hover over the column that you want to search. Click the icon that appears.
3. The **Column Filter** list for that column displays.
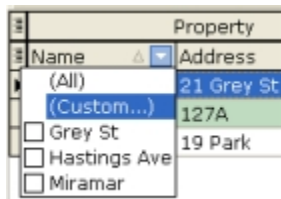
4. Check on each value that you want to view.
5. The screen displays only the values you have selected.
6. To return to the standard view, open the **Column Filter** list and click *All*. All the values available display once again.

Create a Custom Filter

You can create a custom filter for a specific column of data in a Screen.

1. Open the Screen where you want to include a custom filter.
2. In the **Column Filter** list, select *Custom*.
3. The **Custom Filter** screen displays.
4. From this screen, you can set up a Boolean search for the data in that column. Use the values, plus the and/or options.
5. Click **OK**.
6. The custom filter you have created for that column of data will display in the Column Filter list.

Manage Property Data

The Property Screen

The Property Screen is your center for property data. This is the default screen, and it provides access to all the major functions in RPM.

From this page, you can do the following:

- Add or Edit a Property
- Add or Edit a Tenant
- Add or Edit Property Notes or Edit a Property Event Log
- Add or Edit Contacts
- Add or Change Property Photographs
- Add or Edit Expenses
- Add or Edit Income from a Property
- Add or Edit Property Assets
- Add or Edit Property Dimensions
- Delete a Property
- Use the Calculate Rents Function
- View Property reports:
    - Tenant List Report
    - Rent Outstanding Report
    - Property and Tenant Lists
    - Income & Expenses Report
    - Income Report
    - Expenses Report
    - Asset List Report
    - Dimensions Report

To access functions, use the **Property Toolbar.**
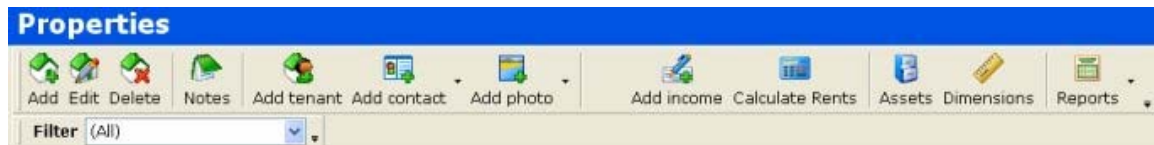
The main data table lists the Properties. To sort the Property list, click on a column item in the Property table heading. The Property list will be sorted based on that column.

Selecting a Property displays information for that Property at the bottom of the page. This includes Tenants, Contacts, Photos, and Logs. You must select a property to add data to that property.
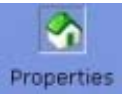
Add or Edit a Property

You can add or edit data about Properties. A Property is a building or space that you own and rent or lease to Tenants.

Add a New Property

1. To add a new Property, go to the **Properties** screen.
2. Click on the **Add Property** button.
3. The **Property Details** screen displays.
4. Complete the Property Data by typing or selecting the information into each field.
5. If a data field is <mark>yellow</mark>, that data is required for the property record. If a data field is white, that data is optional.
6. When all the data required/available is entered, click **OK**.
7. The Property data is saved. The Property displays in the Property screen. You can now assign Assets, Dimensions, and Tenants to the Property.

Edit a Property

1. To Edit a property, go to the **Properties** screen .
2. Find and select the Property in the Property list.
3. Click the **Edit Property** button .
4. The **Property Details** screen displays.
5. Edit the details, then click **OK**. The changed Property data is saved.

Property Details Screen Values

- **Name** - Reference name for the property.
- **Address** - Complete street address of the property.
- **No. Units -** Number of units (apartments, flats, townhouses, offices, etc.) at a property location.
- **Notes** - Enter any notes about the Property.
- **Purchase Date -** Date when the Property was purchased.
- **Value -** The value of the Property.
- **Mortgage** - The outstanding mortgage on the Property.
- **Date Sold** - The date when the Property was sold, if it was sold.
- **Sale Price** - The sale price received for the Property, if it has been sold.

Add or Edit a Tenant

You can add or edit data about Tenants. A Tenant is the person who is renting your property, or a space or unit within your property.

Add a New Tenant

1. To add a new Tenant, go to the **Properties** or **Tenants** screen.
2. Click on the **Add Tenant** button.
3. The **Tenant Details** screen displays.
4. Complete the Tenant Data by typing or selecting the information into each field.
5. If a data field is <mark>yellow</mark>, that data is required for the tenant record. If a data field is white, that data is optional.
6. When all the data required/available is entered, click **OK**.
7. The Tenant data is saved. The Tenant is now assigned to the specified Property, and displays in the Tenant screen.

Edit a Tenant

1. To Edit a tenant, go to the **Tenant** screen .
2. Find and select the Tenant in the Tenant list.
3. Click the **Edit Tenant** button.
4. The **Tenant Details** screen displays.
5. Edit the details, then click **OK**. The changed Tenant data is saved.

Tenant Details Screen Values

TENANT details

- **Last Name**
- **First Name**
- **Title**
- **Email**
- **Mobile Phone**
- **Home Phone**
- **Work Phone**
- **Contact Address**
- **Notes** - Enter any notes about the Tenant.
- **Reference Details** - Enter any people providing character references for the Tenant.

PROPERTY details for the Tenant

- **Property** - Select the Property name from your list of entered Properties.
- **Unit** - Note which Unit at the Property the Tenant is renting.
- **Tenancy Start** - Date of the tenancy start period, as noted on their lease.
- **Tenancy End** - Date when the tenancy ended.
- **Active** - Check this box if this tenancy is still ongoing.
- **Rent Period** - Amount of time for which the tenant pays rent; weekly, biweekly, or monthly.
- **Rent** - Rent amount.
- **Rent Start Date** - Date when the tenant's first rent payment was due.
- **First full rent period** - The date when the first full rent period for the tenant begins.
- **Pro rate initial rent** - Check this box if the first rent amount due was pro rated.
- **Payments in Advance** - Amount of rent received in advance.
- **Deposit** - Tenant's security deposit amount.
- **Deposit Returned Date** - Date when security deposit was returned for former tenants.
- **Deposit Returned** - Yes or No for former tenants.

Add or Edit Notes

You can add or edit detailed text notes about Properties or Tenants.

HINT: Consider whether your information is a Note or whether you need to record it as a formal event in the Event Log for the Property or Tenant.

Instructions

1. To add a new note, go to the **Properties** screen or the **Tenants** screen.
2. Select the Property or **Tenant** for which you want to add a Note.
3. Click on the **Notes** button .
4. The **Notes** screen displays.
5. Type in the note data.
6. When all the note information is entered, click **OK**.
7. The Note is now saved as part of the property or tenant data.

Edit an Event Log

You can add or edit event log entries about each Property or Tenant.

HINT: Consider whether your information is a defined event, that needs its date recorded, or whether you need to record it as more general information in your Notes.

Instructions

1. To add a new log entry, go to the **Properties** screen or the **Tenants** screen.
2. Select the Property or Tenant for which you want to add a log entry.
3. At the bottom of the screen, click on the **Log** tab.
4. The **Log** screen tab displays.
5. To enter a Log Event, right-click in the tab. A small menu displays. Select **Add**.
6. A new row displays for your log event. The log event values are:
    *   **Date** - Select the Date of the log event.
    *   **Category** - From the drop-down menu, select the Category of the log event.
    *   **Comment** - Enter any comments about the log event.
7. When all the note information is entered, click **OK**.
8. The log entry is now saved as part of the property.
9. To delete a log entry, select the entry and right-click. A small menu displays. Select **Delete**. The log entry is deleted.

Add or Change Photos

You can save and manage digital photographs with Property, Tenant, and Inspection files. Digital photos of your property provide a valuable reference, and are useful when advertising the property for rent.

Instructions

1. Before you begin, download the digital photos onto your computer. RPM must be able to locate these photos on your computer.
2. Select the item to which you want to add photos. Click the **Add Photo** button
   .
3. The **Edit Photos** screen displays for that item.
4. Click **Add Images** . The Open screen displays.
5. In the **Open** screen, locate the photo file on your computer. Select it.
6. The photo opens in the **Edit Photos** screen.
7. Add a caption to the photograph, noting its subject matter and the date when it was taken.
8. Use the Back and Forward buttons at the top of the screen to move through and edit photos you have already saved.
9. Once you have added and edited all photographs, click **OK**.
10. The photos display in the Photos tab of the Details for that item.
11. You can edit a photo's caption by selecting it in the Photo Tab. Then, from the Add Photo button drop-down, click **Edit Photo** . In the Edit Photos screen, edit the caption, then click **OK**.
12. Delete a photo by selecting it in the Photo Tab. Then, from the Add Photo button drop-down, click **Delete Photo** . In the Edit Photos screen, click **Delete This Record** . A message asks you to confirm this. Click **Yes.**
13. The photo is deleted. Click **OK**.

HINT: If you do not want a photo to display in the Property Inspection Report Form, uncheck the Show in Report? box in the Photo data screen.

Add or Edit Expenses

You can add or edit data about Expenses assigned to properties. An Expense is a cost or payment for an item or repair related to a property. Note that you can also add or edit an expense as a Recurring Expense.

Add a New Expense

1. To add a new Expense, go to the **Properties** or the **Expenses** screen.
2. Click on the **Add Expense** button Add expense .
3. The **Expense Details** screen displays.
4. Complete the Expense Data by typing or selecting the information into each field.
5. If a data field is <mark>yellow</mark>, that data is required for the Expense record. If a data field is white, that data is optional.
6. When all the data required/available is entered, click **OK**.
7. The Expense data is saved. The Expense is assigned to the selected Property and displays in the Expense screen. It is also included in Reports.

Edit an Expense

1. To Edit an Expense, go to the **Expenses** screen Expenses .
2. Find and select the Expense in the Expense list.
3. Click the **Edit Expense** button Edit expense .
4. The **Expense Details** screen displays.
5. Edit the details, then click **OK**. The changed Expense data is saved.

Expense Details Screen Values

- **Property** - Select the Property to which the Expense is linked.
- **Category** - Select the category for the Expense.
- **Description** - A brief description of the Expense.
- **Payee** - Person or business receiving the Expense.
- **Amount** - Amount of the Expense.
- **Date** - Date when the Expense was paid.
- **Reference** - Invoice number, check number, or other reference for the Expense.
- **Notes** - Enter any notes about the Expense.
- **Charge to tenant** - Check this box if this expense is to be charged to the Tenant at the Property.
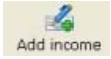
Add or Edit Income from a Property

You can add or edit data about Income paid by tenants. Income is rent or other money paid by a Tenant for the use or occupation of a Property.

HINT: The Calculate Rents Function is a fast, easy way to add the most recent due rents to your list of Income due.

Add a New Income Item

1. To add a new Income item, go to the **Properties** or the **Income** screen.
2. Click on the **Add Income** button .
3. The **Income Details** screen displays.
4. Complete the Income Data by typing or selecting the information into each field.
5. If a data field is yellow, that data is required for the Income record. If a data field is white, that data is optional.
6. When all the data required/available is entered, click **OK**.
7. The Income data is saved. The Income is assigned to the selected Property and displays in the Income screen. It is also included in Reports.

Edit an Income Item

1. To Edit an Income item, go to the **Income** screen .
2. Find and select the Income item in the Income list.
3. Click the **Edit Income** button .
4. The **Income Details** screen displays.
5. Edit the details, then click **OK**. The changed Income data is saved.

Income Details Screen Values

- **Tenant** - Select the Tenant who paid the Income.
- **Category** - Select the Category of income.
- **Date due** - Select the date when the Income was due.
- **Date paid** - Date when the Income was paid.
- **Rent** - Amount of rent due from the Tenant for the Period. ***** Displays for New Income only.
- **Amount Paid** - Amount of the Income paid.
- **Total Outstanding** - Amount of Income still owed by the Tenant.* Displays for New Income only.
- **Reference** - Invoice number, or other reference for the Income.
- **Notes** - Enter any notes about the Income.
- **Late Fee** - Select a late fee calculation option for this income.

Add or Edit Property Assets

You can add or edit Assets to a Property. An Asset is an item, appliance, or space (such as parking) that adds to a property's value. Recording Asset details allows you to maintain the Asset (i.e., order spare parts), communicate with potential renters about all a property's benefits, and include the Asset in Inspection records.

Instructions

1. In the **Property** screen, select a Property.

2. Click the **Edit Assets** button .

3. The Edit Assets screen displays.

4. From this screen, to add a new Asset category, click the **Add Category** button .

5. To edit an Asset category, click the **Edit Category** button . The Edit field displays. Change the Asset category and click OK.

6. To add a new Asset:

   - Select the category for the Asset in the left frame.

   - Click the **Add Asset** button .

   - The **Asset Details** screen displays. Enter the values. If a data field is yellow, that data is required for the record. If a data field is white, that data is optional.

   - The new Asset is added.

7. Click OK to save all changes.

Add Asset Screen Values

- *Asset*
    - **Name -** Asset Name.
    - **Details** - Details of asset.
    - **Notes** - Notes about the Asset. As an example, for appliances, list serial numbers, warranty details, name and brand, etc. For fabric items, list fabric type and cleaning methods.
- *Purchase*
    - **Date Purchased**
    - **Purchase Price**

Add or Edit Property Dimensions

You can add or edit Dimensions of a Property. A Dimension is a space within or related to the property, such as a room, an office, a deck, or a garage. Dimension details are very important for maintenance, i.e., knowing how much carpet, paint, or other materials the property requires. Recording Dimension details allows you to maintain the Dimension, communicate with potential renters about all a property's benefits, and include the Dimension in Inspection records.

Instructions

1. In the **Property** screen, select a Property.

2. Click the **Edit Dimensions** button Dimensions .

3. The Edit Dimensions screen displays.

4. From this screen, to add a new Dimension category, click the **Add Category** button .

5. To edit an Dimension category, click the **Edit Category** button . The Edit field displays. Change the Dimension category and click OK.

6. To add a new Dimension:
    1. Select the category for the Dimension in the left frame.
    2. Click the **Add Dimension** button .
    3. The **Dimension Details** screen displays. Enter the values. If a data field is <mark>yellow</mark>, that data is required for the record. If a data field is white, that data is optional.
    4. The new Dimension is added.

7. Click OK to save all changes.

Add Dimension Screen Values

- **Name -** Dimension Name.
- **Dimension** - Measurements, area, etc. of Dimension item.
- **Notes** - Notes about the Dimension item, i.e., unusual room shape.

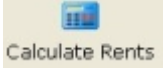## Delete a Property

Deleting a Property is simple.

Instructions

1. In the **Property** screen, select the Property you want to delete.

2. Click the **Delete Property** button ![Delete] .

3. A message displays, asking, "Do you want to send this record to the recycle bin?" Click Yes to delete.

4. The property is deleted.

5. Deleted property records go to the Recycle Bin.

The Calculate Rents Function

What does the Calculate Rents function do? It is an easy way to see who owes you rent, and how much, for the current rental period. Rents are calculated for full periods only.

Instructions

1. Go to the **Properties, Tenants,** or **Income** screen.

2. Click on the **Calculate Rents** button ![Calculate Rents] .

3. In the **Income** screen, the new Rents that are due display.

4. This data is now ready for you to use as a reference.

HINT: You can set up RPM to automatically calculate rents when you start the RPM software. See Setting Up Default Options for instructions.

Property Inspections

The Inspections Screen

As part of managing a property, you need to keep track of the condition of the property. You need to do this by Inspecting before a tenant moves in and after a tenant moves out. This allows you to compare the condition of the property and charge the tenant for any damages that have taken place. The record of your property condition is called an Inspection in RPM. RPM keeps complete Inspection records with your other property data.

From the Inspection page, you can do the following:

- Add or Edit Inspections
- Delete an Inspection
- Save Photos with Property Inspection Files
- Create a Property Inspection Report Form

To access functions, use the Inspections Toolbar.

The main data table lists the Inspections that have taken place. To sort the Inspection list, click on a column item in the Inspection table heading. The Inspection list will be sorted based on that column.

You must select an Inspection to add data to that Inspection, or to print its details as a Property Inspection Report.

Add or Edit Inspections

You can add or edit an Inspection record for a property.

Add an Inspection

1. In the **Inspections** screen [Inspections], click the **Add Inspection** button [Add].
2. The **Inspection Details** screen displays.
3. Select the Property that is being inspected from the Property drop-down menu.
4. Enter the additional data:
- Unit
- Tenant
- Date Inspected
- Check Out
- Inspected By
5. In the **Check List tab**, you will set up Categories to be checked, and specific items to be checked off within those Categories. This allows you to record the state of detailed areas of your property.
6. Add [icon], Edit [icon], or delete [icon] Categories as required.
7. To add check items to a Category, use the **Add Item** button [icon]. The Inspection Check Item screen displays. Enter the Name of the item and Notes about it, then click OK. The item displays in the check list for that Category.
8. To record the status of an item in the check list, check one of its status boxes: Damaged, Fair, or Good. You can also add notes about that item.
9. In the **Photographs tab**, you can save digital photos of the property, as evidence of its condition at the time of inspection. See Save Photos with Property Inspection Files for instructions.
10. In the **Notes tab**, enter any Notes about the property inspection.
11. Click **OK**.
12. The Inspection is saved and added to the Inspection list. You can print out an Inspection as a Property Inspection Report Form, with or without photos.

Edit an Inspection

1. To Edit an Inspection, go to the **Inspections** screen [Inspections].

2. Select the Inspection you want to edit. Click the **Edit Inspection** button [Edit].
3. The **Inspection Details** screen displays for that Inspection.
4. Make changes to the Inspection as required, then click **OK**.

Delete an Inspection

Deleting an Inspection is simple.

Instructions

1. In the **Inspections** screen, select the Inspection you want to delete.
2. Click the **Delete Inspection** button Delete .
3. A message displays, asking, "Do you want to send this record to the recycle bin?" Click Yes to delete.
4. The Inspection is deleted.
5. Deleted Inspection records go to the Recycle Bin.

Save Photos with Property Inspection Files

You can save and manage digital photographs with Inspection files. Digital photos of your property provide a valuable reference for the property's condition.

Instructions

1. Before you begin, download the digital photos of your property onto your computer. RPM must be able to locate these photos on your computer.
2. To add photos to an Inspection, go to the **Inspections** screen Inspections .
3. Select the Inspection you want to edit. Click the **Edit Inspection** button Edit .
4. The **Inspection Details** screen displays for that Inspection.
5. Go to the **Photos tab** of the Inspection Details screen.
6. Click **Add Photo** . The Open screen displays.
7. In the **Open** screen, locate the photo file on your computer. Select it.
8. The photo opens in an **Edit Photos** screen. Add a caption to the photograph, noting its subject matter and the date when it was taken. Use the Back and Forward buttons at the top of the screen to move through and edit photos you have already saved. Once you have added /edited all photographs, click **OK**.
9. The photos display in the Photos tab of the Inspection Details screen.
10. You can edit a photo's caption by selecting it clicking **Edit Photo** . This opens the Edit Photos screen again.
11. You can delete a photo by selecting it and clicking **Delete Photo** .

HINT: If you do not want a photo to display in the Property Inspection Report Form, uncheck the Show in Report? box in the Photo data screen.
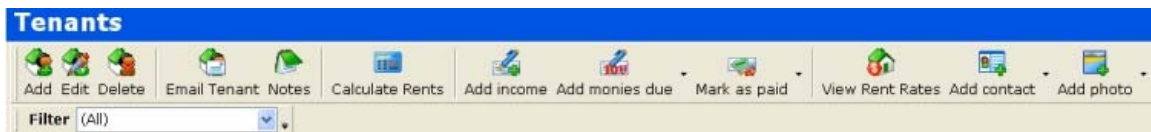
Manage Tenant Data

The Tenant Screen

The Tenant data screen has all tenant data and functions in one convenient location. From this screen, you can:

- Add or Edit a Tenant (see Tenant Data Recommendations as well)
- Delete Tenants
- Email a Tenant
- Add or Edit Notes
- Calculate Rents
- Add Income, Monies Due, or Received Payments
- Review Rent Rates for a Tenant
- Add or Edit Contacts
- Add or Edit Photos
- View Tenant reports:
    - Tenant List Report
    - Tenant Payments Report

The top part of the screen includes the Tenant Toolbar.

To search your tenant list by property, use the Filter menu. Select the property for which you want to view tenants; those tenants display.

The center of the screen displays a database that lists all your tenants. You can sort your tenant data by clicking on the table headers.

When you select a Tenant, the Tenant's rent payment records, contacts, photos, and Event Log appear in the lower half of the screen. You must select a Tenant to make changes to that Tenant.

Tenant Data Recommendations

Your Tenant database is valuable. To help maintain your Tenant records, the following are recommended:

- When you are setting up a Tenant, enter the Tenant's full legal name. If the Tenant commonly uses a nickname, add this to the Notes.

- Use the Add Photo function to save scans or copies of a Tenant's identification, such as a driver's license.

- Use the Notes section to record detailed information about the Tenant. This can include notes about pets, partners or children also living at the property, the Tenant's vehicles.

- Use the Log section to record specific events about the tenant. This can include their requests for repairs, police incidents, and records of notice given.

- When a tenant moves out, update the Rent Finished value in the Tenant Data screen. This way, they do not show up in reports and Calculate Rents functions as a current tenant.

- Do not delete a Tenant, even when they move out and are no longer living at one of your properties. The Tenant's payment records will be useful for your taxes and investment records. You may be asked to provide a reference for the Tenant. A past Tenant may even move back to one of your Properties.

Update Tenant Data

To update Tenant Data, use the Edit a Tenant function. See Add or Edit a Tenant to learn about the details of the Tenant Details screen. See Tenant Data Recommendations for advice about maintaining tenant data.

Send Email to Tenants

RPM makes it easy to send email to one or more of your Tenants.

Instructions

1. In the **Tenants** screen, select the Tenant or Tenants you want to send an email to.

2. Click the **Email Tenant** button .

3. Your default email client opens a new email, with the email addresses of the selected tenants.

4. Type and send your email.

Delete Tenants

Deleting a Tenant is simple.

Instructions

1. In the **Tenants** screen, select the Tenant you want to delete.

2. Click the **Delete Tenant** button .

3. A message displays, asking, "Do you want to send this record to the recycle bin?" Click Yes to delete.

4. The Tenant is deleted.

5. Deleted Tenant records go to the Recycle Bin.

Review Rent Rates for a Tenant

You can review a Tenant's rent rates in RPM. You can also raise or lower their standard rent. The most recent rent rate will be applied as the tenant's rent. Review the rent for one tenant, or review and update all of your tenants.

Instructions

1. In the **Tenants** screen, select the Tenant for whom you want to review their rent rate.

2. Click the **View Rent Rates** button .

3. The Rent Rate screen displays. The data in the screen shows the history of the tenant's rent; the rent amount, the date when it was applied, the date when you will be reminded to review it; and any notes about the rent rise.

4. To add a new rent rate, click the **Add Rent Rate** button. Enter values for:

- **New Rent**

- **Applies From** - select a date

- **Review Date** - select a date. On this date, RPM will prompt you to review and adjust the rent.

- **Notes**

5. Then, click **OK**.

6. The new rent rate is added.

7. To edit an existing rent rate, select it and click the **Edit Rent Rate** button . You can adjust and save the values.

8. To delete a rent rate, select it and click the **Delete Rent Rate** button . Note that you cannot delete the first rent rate.

9. When you are done in the Rent Rates screen, you may want to select the **Recalculate Existing Rents** check box. This will adjust existing rents to show your changes, starting at the "Applies From" date.

10. Click **OK** to save your changes. You can also use the **Show** menu to select another tenant and view their rent rates.

Manage Financial and Contact Data

Managing Financial Data

RPM helps you manage your rental properties efficiently by linking all your property-related financial data. Property records include the property purchase price and mortgage information. Tenant records include details about their deposits and rents. There are several areas for specific financial data in RPM:

- Income - Money brought in as rent for properties.
- Expenses - Money spent on properties in maintenance and asset expenditures.
- Tenants - Money brought in or owed by specific tenants.

There are data screens for both Income and Expenses in RPM. You can:

- Add or Edit Expenses
- Add Income, Monies Due, or Received Payments
- Add or Edit Income from a Property

Financial Reports include:

- Expenses Report
- Income & Expenses Report
- Income & Expenses by Property Report
- Tenant Payments Report

There are also several rent-related functions:

- The Calculate Rents Function adds rents that will be due in the next period to the Income screen.
- Review Rent Rates for a Tenant allows you to review and adjust rents in one simple screen.
- Add Income, Monies Due, or Payments functions enable you to add specific data to a specific tenant's financial records.
- The Rent Outstanding Report lets you see which rents are overdue.
- You can pro rate a first rental payment for a Tenant.
- You can create custom fees for your Tenants.
- You can record multiple payments at once.

The Income Screen

The Income screen provides a summary of Income due and Income received from Tenants. From this screen, you can do the following:

- Add or Edit Income and Recurring Income
- Add Income, Monies Due, or Received Payments
- Delete an Income Item
- Calculate Rents
- View Income reports:
    - Income & Expenses Report
    - Tenant Payments Report

To access functions, use the Income toolbar.
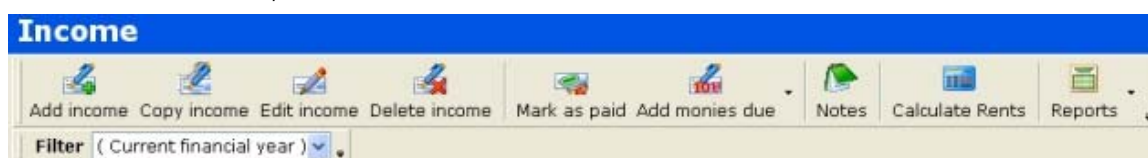
The main data table lists income due and income paid.

To sort the Income list, click on a column item in the Income table heading. The Income list will be sorted based on that column.

You must select an Income item to add data to that Income item.

At the bottom of the page, there is a total number for both income due and income paid.
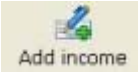
Add or Edit Income from the Income Screen

From the Income screen, you can add or edit income. You can also copy an earlier income payment and edit its information, as a fast way to note a repeating payment.

Income items that are DUE are generated by The Calculate Rents Function. To enter income DUE, see the Add Monies Due function.
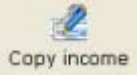
You must enter income PAID. These instructions describe how to enter income paid.

You can edit both income DUE and income PAID items, but you cannot change an income DUE item into an income PAID item.
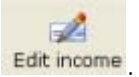
Enter Income Paid

1. To add an Income item, go to the **Income** screen Income .

2. Click the **Add Income** button Add income .

3. The **Income Details** screen displays.

4. Enter the values for the new item. Fields in yellow are mandatory; items in white are not.

5. Click **OK**. The new Income item is saved and noted in the income totals at the bottom of the page.

Copy an Income Item

1. To Copy an Income item, go to the **Income** screen Income .

2. Find and select the Income in the Income list.

3. Click the **Copy Income** button Copy income .

4. The **Income Details** screen displays.

5. Edit the details. Make sure that you change the date, in particular, to show that this is a different income item.

6. Click **OK**. The edited Income is saved as a new Income item.

Edit an Income Item

1. To Edit an Income item, go to the **Income** screen Income .

2. Find and select the Income in the Income list.

3. Click the **Edit Income** button Edit income .

4. The **Income Details** screen displays.

5. Edit the details, then click **OK**. The changed Income data is saved.

Income Details

- **Tenant -** Select the Tenant who paid the Income.
- **Category** - Select the Category of income.
- **Date due** - Select the date when the Income was due.
- **Date paid** - Date when the Income was paid.
- **Rent** - This value is automatically displayed.
- **Amount Paid** - Enter the amount paid by the tenant for this specific income payment.
- **Total Outstanding** - This value is automatically calculated and displayed.
- **Reference** - Enter a reference number for the payment, usually the invoice or check number.
- **Notes** - Enter any notes about the income.
- **Receipt** - Generate a Receipt document for this income.

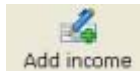# Add Income, Monies Due, or Received Payments for a Tenant

There are multiple ways to update specific financial information for your individual tenants:

- **Add Income** - Use this when a tenant has submitted a partial payment.
- **Add Monies Due** - Use this when a tenant owes money related to their tenancy.
- **Add a Tenant Late Fee** - Use this when you need to add a late fee to a tenant's monies due.
- **Support a Tenant Credit Check** - Support a credit check of a tenant with documentation.
- Insufficient funds function?
- **Mark as Paid** - Use this when a tenant has submitted all monies due.

Note that if a data field is <mark>yellow</mark>, that data is required for the financial record. If a data field is white, that data is optional.

Add Income

1. In the **Tenant** screen or the **Income** screen, click the **Add Income** button
    .
2. The **Add Income** screen displays. Enter the information about the payment received:
4. Click **OK**.
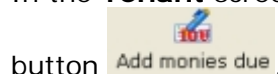5. The new income is recorded against the tenant.

Income Details Screen Values

- **Tenant -** Select the Tenant who paid the Income.
- **Category** - Select the Category of income.
- **Date due** - Select the date when the Income was due.
- **Date paid** - Date when the Income was paid.
- **Rent** - This value is automatically displayed.
- **Amount Paid** - Enter the amount paid by the tenant for this specific income payment.
- **Total Outstanding** - This value is automatically calculated and displayed.
- **Reference** - Enter a reference number for the payment, usually the invoice or check number.
- **Notes** - Enter any notes about the income.
- **Late Fee** - Select a late fee calculation option for this income.
- **Invoice** - Click this button to automatically generate a printable or emailable Invoice file.

Add Monies Due

1. In the **Tenant** screen or the **Income** screen, click the **Add Monies Due** button .
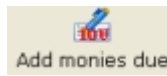
2. The Add Monies Due screen displays. Enter the information about the payments due.

3. Click **OK**.

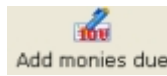4. The monies due are recorded against the tenant.

Income Due Details Screen Values

- **Tenant - Select the Tenant who paid the Income.**
- **Category** - Select the Category of income.
- **For Period** - Select the date period that this income will be applied against.
- **Date due** - Select the date when the Income was due.
- **Amount Due** - Enter the amount due.
- **Notes** - Enter any notes about the income.
- **Invoice** - Click this button to automatically generate a printable or emailable Invoice file.
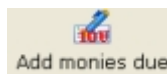
Add a Late Fee to a Tenant

1. In the Tenant screen In the **Tenant** screen or the **Income** screen, go to the **Add Monies Due** button.
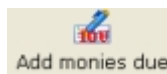
2. Beside the **Add Monies Due** button , click the drop-down menu. Select *Add Late Fee*.

3. The **Income Details** screen displays for the tenant. Edit the **Late Fee** field.

4. Click **OK**.

5. The new Late Fee is recorded against the tenant and added to their monies due.

Support a Tenant Credit Check

1. In the Tenant screen In the **Tenant** screen or the **Income** screen, go to the **Add Monies Due** button.

2. Beside the **Add Monies Due** button , click the drop-down menu. Select *Credit Check*.

3. The **Income Due** screen displays for the tenant.

4. Click the **Invoice** button.

5. Save the Invoice file.

6. Use the Invoice as a record of their monies due to support a credit check.

Mark Tenant as Paid

1. In the Tenant screen In the **Tenant** screen or the **Income** screen, select an item for a Tenant.

2. Click the **Mark as Paid** button . All the Tenant's outstanding payments are marked as paid.

3. Another way to use this function is to click the drop-down menu for the Mark as Paid button. You can select:

- **Mark as paid** - for one tenant.

- **Mark selected as paid** - for more than one tenant.

Delete an Income Item

Deleting an Income Item is simple.

Instructions

1. In the **Income** screen, select the Income you want to delete.

2. Click the **Delete Income** button .

3. A message displays, asking, "Do you want to send this record to the recycle bin?" Click Yes to delete.

4. The Income is deleted.

5. Deleted Income records go to the Recycle Bin.

The Expenses Screen

The Income screen provides a summary of Income due and Income received from Tenants. From this screen, you can do the following:

- Add or Edit Expenses and Recurring Expenses
- Delete an Expense
- Add Notes to an Expense
- View Expense reports:
  - Income & Expenses Report
  - Expenses Report

To access functions, use the Expense toolbar.
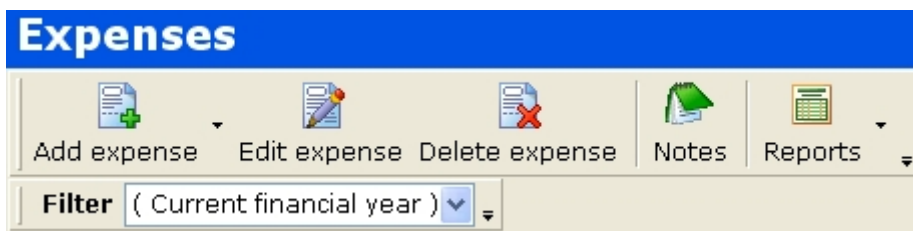
The main data table lists all paid expenses. To sort the Expense list, click on a column item in the Expense table heading. The Expense list will be sorted based on that column.

You must select an Expense item to add data to that Income item.

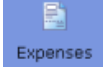At the bottom of the page, there is a total number as a summary of all expenses.

Delete an Expense Item

Deleting an Expense Item is simple.

Instructions

1. In the **Expense** screen , select the Expense you want to delete.

2. Click the **Delete Expense** button .

3. A message displays, asking, "Do you want to send this record to the recycle bin?" Click Yes to delete.

4. The Expense is deleted.

5. Deleted Expense records go to the Recycle Bin.

The Contacts Screen

The Income screen provides a summary of Income due and Income received from Tenants. From this screen, you can do the following:

- Add or Edit Contacts
- Delete a Contact
- Add Notes to a Contact
- Add a Photo to a Contact's Records - Use this to save images of work the contact has done, copies of the contact's scanned qualifications or ID.
- Add an Event Log entry for a Contact

To access functions, use the Contact toolbar.
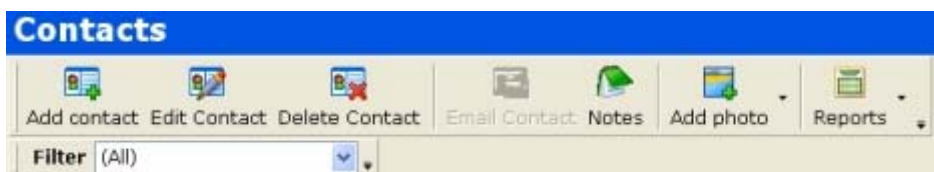
The main data table lists all contacts. To sort the Contact list, click on a column item in the Contact table heading. The Contact list will be sorted based on that column.

When you select a Contact, the Contact's photos and Event Log appear in the lower half of the screen.

Add or Edit Contacts

You can add or edit data about Contacts. A Contact is a person, service provider, or organization that is involved in your properties. Examples of these would be: cleaners, plumbers, electricians, rental agencies, banks, and local government. A Contact can be associated with a specific property and/or a specific tenant.

Add a New Contact

1. To add a new Contact, go to the **Contacts** or **Tenants** screen.
2. Click on the **Add Contact** button .
3. The **Contact Details** screen displays.
4. Complete the Contact Data by typing/selecting the information into each field.
5. If a data field is <mark>yellow</mark>, that data is required for the tenant record. If a data field is white, that data is optional.
6. When all the data required/available is entered, click **OK**.
7. The Contact data is saved.

Edit a Contact

1. To Edit a tenant, go to the **Contact** screen .
2. Find and select the Contact in the Contact list.
3. Click the **Edit Contact** button .
4. The **Contact Details** screen displays.
5. Edit the details, then click **OK**. The changed Contact data is saved.

Contact Details Screen Values

- **Property** - If desired, link a Property to the Contact.
- **Tenant** - If desired, link a Tenant to the Contact.
- **Category -** Select a Category for the Contact.
- **Last Name**
- **First Name**
- **Title**
- **DOB -** Date of Birth, if relevant.
- **Company**
- **Email**
- **Mobile Phone**
- **Home Phone**
- **Work Phone**
- **Contact Address**
- **Notes** - Enter any notes about the Tenant.

Delete a Contact

Deleting a Contact is simple.

Instructions

1. In the **Contact** screen, select the Contact you want to delete.

2. Click the **Delete Contact** button .

3. A message displays, asking, "Do you want to send this record to the recycle bin?" Click Yes to delete.

4. The Contact is deleted.

5. Deleted Contact records go to the Recycle Bin.

Using the RPM Planner

About the RPM Planner
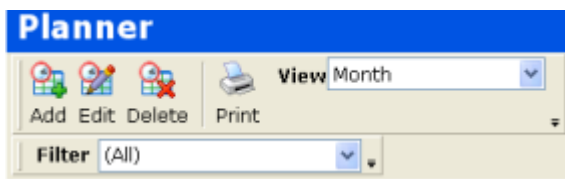
The RPM Planner screen has all tenant data and functions in one convenient location. From this screen, you can:

- Add or Edit a Planner Event
- Setting Recurrent Planner Events
- Delete a Planner Event

You can also Print the Planner view.

The top part of the screen includes the Planner Toolbar.

To review your Planned Events, use the **View** menu. Select one of the View options:

- **Month** - In the Month view, Events are shown in a table that lists the days of each month, and all the properties, showing events at a glance for each month.
- **Events** - In the Events view, Events only are listed with Event data. In the Event view, you can sort your Event data by clicking on the table headers.

To view Events for a selected Property, use the **Filter** menu. Select the property for which you want to view events.

You must select an Event to make changes to that Event.

Add or Edit a Planner Event

You can add or edit property-related Events in the RPM Planner. An Event is an inspection, rent due date, or other event related to one of your properties. You may need to go to the property in person, or arrange for a service or a phone call. Follow the instructions below to add or edit a planner Event. You can also add or edit an event by double-clicking the calendar.

Add a New Event

1. To add a new Event, go to the **Planner** screen .
2. Click on the **Add Event** button .
3. The **Event Details** screen displays.
4. Complete the Event Data by typing/selecting the information into each field.
5. If a data field is <mark>yellow</mark>, that data is required for the Event record. If a data field is white, that data is optional.
6. When all the data required/available is entered, click **OK**.
7. The Event data is saved. The Event is assigned to the selected Property and displays in the Event screen.

Edit an Event

1. To Edit an Event, go to the **Planner** screen .
2. Find and select the Event in the Event list.
3. Click the **Edit Event** button .
4. The **Event Details** screen displays.
5. Edit the details, then click **OK**. The changed Event data is saved.

Event Details Screen Values

If an Event occurs in the past, you can only view the Events values; you cannot edit them.

- **Subject** - Title of Event.
- **Start time** - Start day and time of Event.
- **End time** - End day and time of Event.
- **Repeats** - Note if this event will repeat. To edit this, click the **Edit** button and use the Recurrency screen, as described in Setting Recurrent Planner Events.
- **Notes** - Enter any notes about the Event.
- **Reminder** - Check this to activate a Reminder message. To set the amount of time before the event that prompts the reminder, select the time from the drop-down menu.
- **Property** - Select any related Property from the drop-down menu.
- **Tenant** - Select any related Tenant from the drop-down menu.

Setting Recurrent Planner Events

A recurrent event is an event that repeats over multiple days, weeks, months, or years. An example of a recurrent event is a rental payment. You can set up recurrent events in the Planner.

Add a New Event

1. To add a new Event, go to the **Planner** screen .

2. Click on the **Add Event** button .

3. The **Event Details** screen displays.

4. Complete the Event Data by typing or selecting the information into each field. If a data field is yellow, that data is required for the Event record. If a data field is white, that data is optional.

5. When all the data required/available is entered, click **OK**.

6. The Event data is saved. The Event is assigned to the selected Property and displays in the Event screen. The Event will be added to the Planner calendar at the required recurrency intervals.

Recurrency Values

Settings Tab

Recurrency Pattern

Select one of the following:

- None
- Hourly
- Daily
- Weekly
- Monthly
- Yearly

Pattern Details

Select an Interval Value (1, 2, 3) and enter the recurrency details. These details vary based on the type of recurrency you choose.

Range

Set up the range of the event recurrency by selecting one of the following options:

- Infinite
- For X occurrences
- Until X date

Exceptions

Set up any Exceptions, i.e., times when the recurrent message should not be activated or prompted, for example, a holiday or leap year day. Select the To and From date and time. You can use the buttons to add or remove exceptions, or Clear all exceptions.

Delete a Planner Event

Deleting a Planner Event is simple.

Instructions

1. In the **Planner** screen , select the Event you want to delete.

2. Click the **Delete Event** button .

3. A message displays, asking, "Do you want to send this record to the recycle bin?" Click Yes to delete.

4. The Event is deleted. Recurring Events are deleted across all the recurring dates.

5. Deleted Event records go to the Recycle Bin.

Property and Finance Reports

About Reports

RPM Reports provide complete details about your properties. The reports give you easy reference files for reviewing your property-related information and finances.

HINT: You can also share your valuable RPM data with others via the reports. These reports can printed out and given to real estate agents, accountants collection agencies, and others performing property actions on your behalf.

Every report has a title and the date when the report was created.

How can you use the different reports? Some suggestions for each report are listed below.

- Asset List Report - Compare assets at your different properties to see what needs to be upgraded, or note what has been added in the past year.
- Blank Report - Use this as a basis for building your own report.
- Blank Inspection Report - Use this as a form when inspecting a property.
- Dimensions Report - Compare the spaces at your different properties for marketing and maintenance.
- Expenses Report - See at a glance which property is costing the most in maintenance.
- Expenses by Property Report - Review expenses for a particular property.
- Income Report - Review your overall income from your rental properties.
- Income and Expenses Report - Fast and easy way to see if properties are making, or losing, money.
- Income and Expenses by Property Report - Review income and expenses for a particular property.
- Inspection Report - A report with information recorded during an Inspection for a particular property.
- Inspection Report with Photos - A report with information and photos from an Inspection for a particular Property.
- Invoice - Click this to generate an invoice document with report editing capabilities.
- Property List Report - A list of all your properties and their current status.
- Property Summary - Describes the financial activity for all of your Properties within a selected date range.
- Property Inspection Report - Review the most recent dates for all inspections.
- Rent Outstanding Report - Review outstanding rents for all properties.
- Receipt - Click this to generate a receipt document with report editing capabilities.
- Summary Report - A list of your total Income and Expenses for a selected date range.

- Tenant Details Report - A list of tenant data focusing on tenancy length, deposits, and deposits returned.
- Tenant List Report - Complete and detailed list of tenants.
- Tenant Payment Summary - A list of tenants with their contact information and current financial status.
- Tenant Payments Report - Find out which tenants owe money and act to collect!
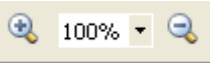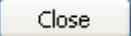
View Reports

It is easy to view reports. The instructions below describe how to view reports with data and how to use the Reports Toolbar.

Viewing Reports

1. From a data Screen, click the **Reports** button. A drop-down menu displays, listing all the report options for that data Screen.
2. To view a list of all available reports, in the **View menu** click **Reports,** or from the **Reports** button, click the **Show All Reports** option. A small screen displays, listing all the report options.
3. In the menu or screen, click on the Report you want to view.
4. The report displays. Use the Reports Toolbar to view, save, & export.

The Reports Toolbar

|	
	Print the report.
100%	Use the Zoom navigation to change how you view the report on your computer screen. Zooming Out, or to a smaller percentage, makes the report smaller, so that you can see more of it on your screen. Zooming In, or to a larger percentage, makes the report larger, so that you can read details.
	Open a saved report.
	Save a report.
	Export a report into a different file or graphic format.
	Save the report as a PDF file.
	Send the report via an email.
	Search the report.
1	Use the arrows and page number field to navigate to different pages of a multi-page report.
	View the report using the full screen.
	View the report with an outline in the left sidebar.
	View the report with thumbnails of report pages in the left sidebar.
	Change the paper size and other page settings of the report.
	Edit the value headers and other text displayed in this report.
Close	Close the report.

Editing Reports

You can edit the field titles and other text in a Report. When you want to Edit a report, RPM will open a new function module called FastReport. FastReport includes its own online help with detailed instructions. However, we have included the basic elements of working with FastReport for RPM report files below.

Instructions

1. View a Report.

2. The **Edit button** appears in the Report toolbar. Click this button.

3. The FastReport utility displays.

4. Use FastReport to make changes to your report.

5. To edit an item, right-click it and select **Edit**. A window displays for you to make changes to text.

6. To save an edited report, click **File - Save.** A Save Screen displays.

- To save this report as a once-only report, save it in any folder location.

- To save your changes to be used in all versions of this report, navigate to the RPM program installation and save the file in the folder SystemReports. Save it without changing its file name. When you use this report in the future from RPM, it will have your values.

7. When you exit FastReport (**File - Exit)**, you are returned to the report in RPM.

Search Reports

It is easy to run a basic text search of a Report.

Instructions

1. View a Report.

2. The **Search** button appears in the Report toolbar. Click this button and a **Find Text** field displays.

3. In the Text field, enter the term or number you want to find. Use the "case sensitive" or "search from beginning" options, if required. Click **OK**.

4. The term will be highlighted in the report. If it is not found, a message will tell you that it is not in the report.

Asset List Report

The Asset Report displays a complete list of all the Assets for a selected Property. This is useful for managing maintenance and renovations of properties, tax purposes, and communicating with potential renters.

To View this report, select the Property in the **Property** screen. Then go to the

Reports button and select the Assets report.

Report Data

The following data is listed for each Property:

Name and Address The name and full address of the Property.

The following data is listed for all the dimensions at each Property:

Category Category of Asset described below.

Asset Name of the specific Asset.

Details Description of the Asset.

Purchase Date Date when asset was purchased.

Purchase Price Value of asset at time of purchase.

Notes Notes about the Asset.

Blank Report

The Blank Report is different from other reports. This report has no values in it except for the Property list. It is here as a template for you to use in creating and saving your own reports using the FastReport function, accessed by clicking the **Edit**

Report button . See Editing Reports for basic information.

Dimensions Report

The Dimensions Report displays a complete list of the Dimensions for a selected Property. This is useful for managing maintenance and renovations of properties, estimating utility expenses, and communicating with potential renters.

To View this report, select the Property in the **Property** screen. Then go to the

Reports button and select the Dimension report.

Report Data

The following data is listed for each Property:

Name and Address   The name and full address of the Property.

The following data is listed for all the dimensions at each Property:

Category   Category of Dimension described below.

Name   Name of the Dimension area.

Dimensions   Measurements, area, or other reference information for the Dimension area.

Expenses Report

The Expenses Report displays a complete list of Expenses for all your Properties. This is useful for tax deductions related to properties. You will be prompted to choose a date period for this report.

To View this report, go to the **Reports** button and select the Expenses report.

Report Data

The following data is listed for each Property:

Tax Status   Whether or not the expense is tax-deductible.

Category   Category of the expense.

The following data is listed for the expenses in each Tax Status and Category:

Date   Date of the expense.

Property   Property for the expense.

Details   Any data you entered for the expense.

Description   Description that you entered for the expense.

Reference   Invoice, check number, or other reference information for the expense.

Subtotal   Subtotal of expenses for this tax status and category

Grand Total   Total expenditures for the report.

Expenses by Property Report

The Expenses by Property Report displays a complete list of Expenses for a selected Property. This is useful for tax deductions related to properties. You will be prompted to choose a date period for this report.

To View this report, select the Property in the **Property** screen. Then go to the

Reports button and select the Expenses by Property report.

Report Data

The following data is listed for each property:

Property   The name of the property.

Address   The address of the property.

The following data is listed to summarize expenses:

Tax Status   Whether or not the expense is tax-deductible.

Category   Category of the expense.

The following data is listed for the expenses in each Tax Status and Category:

Date   Date of the expense.

Property   Property for the expense.

Details   Any data you entered for the expense.

Description   Description that you entered for the expense.

Reference   Invoice, check number, or other reference information for the expense.

Subtotal   Subtotal of expenses for this tax status and category.

Subtotal for Property   Subtotal of expenses for the property.

Grand Total   Total expenditures for the report.

Income Report

The Income Report displays a complete list of Income for all your Properties. This is useful for tax related to properties. You will be prompted to choose a date period for this report.

To View this report, in the Income screen, go to the **Reports** button and select the Income report.

Report Data

The following data is listed for each Property:

Tax Status   Whether or not the income is taxable.

Category   Category of the income.

The following data is listed for the expenses in each Tax Status and Category:

Date   Date of the income

Property   Property for the income

Details   Any data you entered for the income, usually the payer.

Reference   Invoice, check number, or other reference information for the income.

Subtotal   Subtotal of income for this tax status and category

Grand Total   Total income for the report.

Income and Expenses Report

The Income & Expenses by Property Report displays a complete list of all Income and Expenses, listed by Tax Status and Category.

To View this report, in the Income or Expenses screen, go to the **Reports** button

Reports and select the Income and Expenses report.

Report Data

The following data is listed:

Tax Status   Whether or not the income or expense is tax-deductible.

Category   Category of the income/expense.

The following data is listed for the incoming and outgoing funds in each Tax Status and Category:

Date   Date.

Property   Property for the entry

Details   Any data you entered.

Description   Description that you entered.

Reference   Invoice, check number, or other reference information.

Expense   Any expenses related to the date.

Income   Any income related to the date.

Subtotals for categories   Subtotal of income and expenses for this tax status and category.

Grand Total   Total income and expenditures.

Income and Expenses by Property Report

The Income & Expenses by Property Report displays a complete list of all your properties and their associated Income and Expenses. Each Property has its own page in this report.

To View this report, select the Property in the **Property** screen. Then go to the

Reports button Reports and select the Expenses by Property report.

Report Data

The following data is listed for each Property:

Tax Status   Whether or not the income or expense is tax-deductible.

Category   Category of the income/expense.

The following data is listed for the incoming and outgoing funds in each Tax Status and Category:

Date   Date.

Property   Property for the entry

Details   Any data you entered.

Description   Description that you entered.

Reference   Invoice, check number, or other reference information.

Expense   Any expenses related to the date.

Income   Any income related to the date.

Subtotals for categories   Subtotal of income and expenses for this tax status and category.

Total for Property   Total income and expenditures for the property.

Inspection Report Form

The Property Inspection Report Form has three uses:

- Providing a summary of an Inspection for review.
- Providing a form/checklist with data from previous Inspections to be used as a comparison for a current inspection.
- Providing a blank form/checklist to be used for a current inspection.

You can create a Property Inspection Report form in three levels. These instructions are for an Inspection Report that includes data from the Inspection files, but does not include any property photographs.

To View this report, in the **Inspections** screen, go to the **Reports** button [Reports] and select the Inspection Report.

Report Data

The following data is listed for each Property:

Name and Address	The name and full address of the Property.
Unit	If applicable, the specific unit of the property.
Tenant	The tenant renting the property during the inspection.
Inspection Date	Date of the inspection.
Check Out	Check this box if the inspection date is the tenant's moving out date.
Inspected By	Person who did the inspection.
General Notes	Notes entered about the inspection.

The following data is listed for the inspection at the Property:

Category	Category of Inspection Area (Dimension) described in an Inspection section.
Notes	Notes about this Inspection Area.
Checklist Items	List of items inspected for this Category. For each item, the following is noted with a check:

- Condition as Damaged, Fair, Good
- Notes

Inspection Report with Photos

The Property Inspection Report Form has three uses:

- Providing a summary of an Inspection for review.
- Providing a form/checklist with data from previous Inspections to be used as a comparison for a current inspection.
- Providing a blank form/checklist to be used for a current inspection.

You can create a Property Inspection Report form in three levels. These instructions are for a Report including data and photographs from the Inspection file.

To View this report, in the **Inspections** screen, go to the **Reports** button ![Reports] and select the Inspection Report with Photos report.

Report Data

The following data is listed for each Property:

Name and Address	The name and full address of the Property.
Unit	If applicable, the specific unit of the property.
Tenant	The tenant renting the property during the inspection.
Inspection Date	Date of the inspection.
Check Out	Check this box if the inspection date is the tenant's moving out date.
Inspected By	Person who did the inspection.
General Notes	Notes entered about the inspection.

The following data is listed for the inspection at the Property:

Category	Category of Inspection Area (Dimension) described in an Inspection section.
Notes	Notes about this Inspection Area.
Checklist Items	List of items inspected for this Category. For each item, the following is noted with a check:

- Condition as Damaged, Fair, Good
- Notes

Inspection Photographs	If you have created the Property Inspection Report with the Photographs option, all the Photographs are grouped together with their titles at the end of the Report.

Blank Inspection Report Form

You can create a Property Inspection Report form in three levels. These instructions are for creating a blank one to use as a form. This is a useful checklist for the property inspector on site. They can return it to your RPM user, who will enter the values into RPM easily.

To View this report, in the **Inspections** screen, go to the **Reports** button [Reports] and select the Blank Inspection Report.

Report Data

The following data is listed without any values, for the property inspector to complete:

Name and Address	The name and full address of the Property.
Unit	If applicable, the specific unit of the property.
Tenant	The tenant renting the property during the inspection.
Inspection Date	Date of the inspection.
Check Out	Check this box if the inspection date is the tenant's moving out date.
Inspected By	Person who did the inspection.
General Notes	Notes entered about the inspection.

The following data is listed for the inspection at the Property:

Category	Category of Inspection Area (Dimension) described in an Inspection section.
Notes	Notes about this Inspection Area.
Checklist Items	List of items inspected for this Category. For each item, the following is noted with a check:

- Condition as Damaged, Fair, Good
- Notes

Property List Report

The Property List displays a complete list data about your Properties. This is useful for as an overview of your property holdings, availability, and mortgage status.

To View this report, in the **Property** screen, go to the **Reports** button Reports and select the Property List report.

Report Data

The following data is listed for each property:

Property   The name of the property.

Address   The address of the property.

Notes   Any Notes listed about the property.

Purchase Date   Date when you purchased the property.

Value   The value of the property.

Mortgage   The outstanding mortgage on the property, if any.

Property Summary Report

The Property Summary displays financial data for each of your Properties. This is useful for as an overview of your property income and expenses. Each property displays on a separate page of the report.

To View this report, in the **Property** screen, go to the **Reports** button Reports and select the Property Summary report.

Report Data

The following data is listed for each property:

Property   The name of the property.

Expense   The address of the property.

Income   Any Notes listed about the property.

Total   Date when you purchased the property.

Rent Outstanding Report

This Report lists all the tenants who owe outstanding rent. It includes contact information for the tenant, so that a person using this report can get in touch with the tenants to request the overdue rent.

To View this report, in the Tenants screen, go to the **Reports** button and select the Rent Outstanding Report.

Report Data

The following data is listed for each Tenant who has overdue rent:

Tenant	Full name of the Tenant.
Property	Name and address of the Property where the tenant is renting.
Mobile, Home, Work	Mobile, home, and work telephone numbers entered for that Tenant.
Email	Email address for that Tenant.
Due	Amount due from this tenant.
As At	Date when Amount Due has been noted.
Paid	Amount paid by this tenant.
Last Payment	Date of most recent payment by this tenant.
Outstanding	Amount still owed by this tenant.
Total Due	Total amount still due.
Total Paid	Total amount paid.
Total Outstanding	Total amount outstanding.

Summary Report

The Summary Report displays a concise list, distilled to its essence, of all Income and Expenses, for a selected date range. This is useful when calculating annual taxes, or to view your overall profit or deficit.

To View this report, in the Income or Expenses screen, go to the **Reports** button

Reports and select the Summary Report.

Report Data

The following data is listed:

Expenses   Any expenses incurred during the selected date range.

Income   Any income received during the selected date range.

Totals for   Subtotal of income and expenses.
categories

Total   Total profit or deficit after expenses are subtracted from income.

Tenant Details Report

The Tenant Details report displays a complete list of information about all of your tenants. It is specifically useful for reviewing the length of tenancy and deposit versus deposits returned.

To View this report, in the Tenants screen, go to the **Reports** button Reports and select the Tenant List Report.

Report Data

The following data is listed for each Tenant:

Tenant   First name, last name, and title of a tenant.

Company   The tenant's place of employment or business.

Tenancy   The dates during which the tenant is or was occupying a property.

Property   The name and full address of the Property the tenant is or was renting.

Work, Mobile, Home   The Notes you have entered for the Property.

Deposit   The amount a tenant paid as a deposit before renting the Property.

Returned   The amount of any deposit returned to the tenant at the end of their tenancy.

Tenant List Report

The Tenant List report displays a complete list of all your properties and their associated tenants.

To View this report, in the Tenants screen, go to the **Reports** button and select the Tenant List Report.

Report Data

The following data is listed for each Property:

Name and Address	The name and full address of the Property.
Notes	The Notes you have entered for the Property.

The following data is listed for the Tenants at each Property:

Name	Full name of the Tenant.
Rent	Rent and frequency of rent payments for this Tenant.
Mobile, Home, and Work	Mobile, home, and work telephone numbers entered for that Tenant.

Tenant Payments Report

The Tenant Payments report displays a complete list of all the payments made by a selected Tenant. Rent and deposits are included.

To View this report, select the Tenant in the **Tenants** screen. Then go to the **Reports** button Reports and select the Tenant Payment Report.

Report Data

The following data is listed for each Tenant:

Tenant	Full name of the Tenant.
Mobile, Home, Work	Mobile, home, and work telephone numbers entered for that Tenant.
Property	Name of the Property where the tenant is renting.
Address	Address of the Property where the tenant is renting.
Period	Time period of a payment.
Date	Date of a payment.
Category	Category of a payment, normally Rent.
Due	Amount due at that date, if it has not been paid.
Paid	Amount that was paid on the noted date.
Arrears Notes	Any payments overdue/in arrears as of the noted date.
Totals:	Totals of money Due and money Paid by the tenant during their tenancy at your property.

Tenant Payment Summary

The Tenant Payments Summary report displays a list of all Tenants, the totals of the money they have paid and they owe, and their contact information. It is a convenient document to help contact tenants in arrears.

To View this report, in the Tenants screen, go to the **Reports** button ![Reports] and select the Tenant Payment Summary Report.

Report Data

The following data is listed for each Tenant:

Tenant	Full name of the Tenant.
Mobile, Home, Work	Mobile, home, and work telephone numbers entered for that Tenant.
Property	Name of the Property where the tenant is renting.
Address	Address of the Property where the tenant is renting.
Due	Amount due at that date, if it has not been paid.
Paid	Amount that was paid on the noted date.
Arrears	Any amount overdue/in arrears.

Databases

About Databases

RPM saves your property information as data, in a group of linked files called a Database. RPM is installed with a database that contains sample data. You can continue to save information in this database, but we recommend that you create a new database for your property data.

Creating Databases is easy in RPM. You can reopen a saved database at any time. You may even want to have multiple databases for different groups of rental properties. You could set up different data sets, with Assets and Dimensions and Options defaults, for residential and commercial properties, for example. To review the database you wanted, you would Open the Saved Database.

You can also:

- Repair a Database - Run an update of your database files, a combination of restoring data from system backups with the addition of changes made to the database since the backup (typically using log files).

- Restore a Database - Open and re-implement your database Backup file.

NOTE: In RPM, changes to the open database are saved automatically. This is done whenever you click OK, or change to another row.

Creating Databases of RPM Data

You can create a database file from your RPM property data. Before you begin to enter data, you should create a database. The data you enter will be saved in the selected database.

Instructions

1. In the **File** menu, select **Create Database**.
2. The New Database screen displays.
3. In the *Database Name* field, enter the name of the new database file.
4. In the *Database Location* field, click on the folder icon. Browse your PC for the system location of the new database file. **IMPORTANT:** Microsoft Vista users must create the database in their *My Documents* folder.
5. Click **OK**.
6. The new database is created and saved. You can:
- Save the database as a backup
- Send the database to another RPM user for them to use

Opening a Saved Database

You can open a saved RPM database file in RPM.

NOTE: Do NOT try to open a database file that has not been created using RPM with this program.

Instructions

1. In the **File** menu, select **Open Database**.
2. The Open screen displays.
3. Browse your PC for the system location of the database file that you want to open.
4. Select the file and click **OK**.
5. The selected database is opened.

Back Up a Database

You can and should back up your databases. Backing up your database protects your data in case of a system or software failure. If there is a failure or a problem, the backup file makes it possible to fully recover the database.

NOTE: The more data you have in your database, the more important it is to back it up. You may want to save your backups in a secure file location that is not on your computer, i.e., on a flash drive or a CD-ROM.

Instructions

1. In the **File** menu, select **Backup Database**.
2. The Save As screen displays.
3. Browse your PC for the system location where you want to save the file.
4. Make sure that the file has a name that is meaningful to you. The default file name is:

   <database_name><date>.rpmbackup

5. Click **OK**.
6. The database is saved.

Restore a Database

If you are having database or system problems, you may want to restore a backed-up database. Restoring a database opens and re-implements your database Backup file. It restores all your data up to the date and time of the backup.

NOTE: Do NOT try to open a database file that has not been created using RPM with this program.

Instructions

1. In the **File** menu, select **Restore Database**.
2. The Open screen displays.
3. Browse your PC for the system location of the database file that you want to open.
4. Select the file and click **OK**.
5. The selected database is opened. Your data is restored up to the time and date when the backup file was saved.

Repair a Database

What if you are having database or system problems - and you have forgotten to create a database Backup for a while? You can try to run a Repair of the database.

A Repair of the database is an update of your database files, a combination of restoring data from system backups with the addition of changes made to the database since the backup (typically using log files).

A Repair is not a guaranteed fix. It is not as good as a backed up database that you restore.

Instructions

1. In the **File** menu, select **Repair Database**.
2. The Open screen displays.
3. Browse your PC for the system location of the database file that you want to use as the basis of the Repair.
4. Select the file and click **OK**.
5. RPM processes the repair. This may take a few minutes.
6. The selected database is opened. Your data displays.
7. Save the Repaired database.

Password Protect a Database

Your financial and property information is valuable. To support your security, you may want to protect your databases with passwords. You can also remove passwords from databases, using the **Remove Password** command.

NOTE: Please keep records of your passwords.

Instructions

1. In the **File** menu, select **Password Protect**.
2. The Password screen displays.
3. Enter the password that you want to use for this database.
4. Click **OK**.
5. In future, if you want to open this database, you must enter the password.

Tutorials and FAQs

About Tutorials and FAQs

To help you teach yourself how to use RPM to is fullest potential, this section includes tutorials about advanced RPM functions. This section includes our Frequently Asked Questions list.

It also includes step-by-step reviews of the following processes:

- Customizing and Viewing New Data Fields
- Creating Late Fees
- Creating Custom Fees
- Pro Rating a First Rent Payment
- Recording Payments from Multiple Tenants

If there is a tutorial or FAQ you would like to see, please contact Source IT. We are happy to answer your questions as part of product support.

Frequently Asked Questions About RPM

Is Rental Property Manager Vista compatible?

RPM version 1.30 and later are Vista compatible. However, Vista users have to use a specific system location to save a database. Note that version 1.30 is a free upgrade for registered users.

Can Rental Property Manager display values in any currency?

RPM uses the values from your Windows Regional Settings for displaying currencies. For example, if you are set up with New Zealand regional settings, the currency will display as New Zealand dollars. Regional Settings also apply to date and time records in RPM>

Customizing and Viewing New Data Fields

This tutorial describes how to add a **custom field** to your data Details.

As an example, this tutorial will add the custom field "Second Tenant" to Tenant data. Every time the user goes to enter or edit a Tenant, they will be able to enter data in the "Second Tenant" field. The same process can also be used to add custom fields to Contacts, Expenses, Income, Inspections, and Property.

Adding the custom field

1. Go to the **Tools** menu, and click on **Options**.
2. In the *Options* screen, go to the **Custom Fields** page.
3. In the Selection drop-down menu, choose the section of RPM data that needs a custom field. Here, select the section *Tenant*.
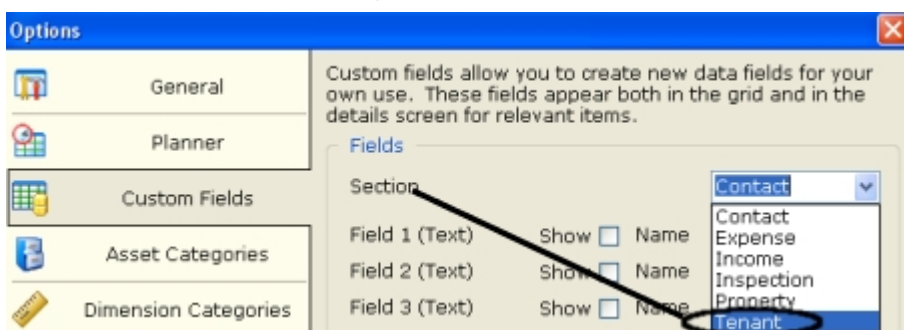
1. Next, check the **Show** box beside Field 1 (Text).
2. Type *Second Tenant* into **Name.**

3. Click OK.
4. The custom field of *Second Tenant* has been saved for Tenant data.

Entering data in the new custom field

7. To test the new field, go to the Tenants screen.
8. Double click on an existing tenant. The Tenant Details screen displays, with the new field, *Second Tenant.*
9. Enter data into *Second Tenant* and click OK.

10. The new data is saved against the Tenant.

Displaying new custom field data in the Screen

11. Click on the **Quick customize** button in the Tenant grid, and check *Second Tenant*.
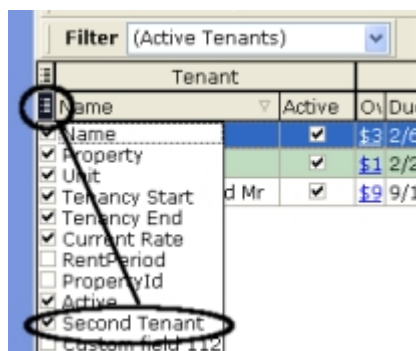
12. The value *Second Tenant* will now display in the Tenant data grid. You can click and drag the column header to move it around. You can also click and drag the right edge to resize the column. The new size and position will be changed when you close RPM.

13. You can click on the *Second Tenant* header to sort this column's data, and you can search it.

Creating Late Fees

This tutorial describes how to create and charge a late fee.

A late fee is a charge against a tenant levied as a penalty for a late rental payment.

As an example, the user will create and charge two types of late fee, charging $15.00 for the first late fee and $25.00 for the second late fee.

Creating the Late Fee

1. In the **Tools** menu, click **Options**.
2. The **Options screen** displays.
3. Select the **Default Fees** option.
4. Go to the *Late Fees* frame and set up the first late fee. In the row for the *First* fee, enter values for the first fee:

- **Type** - Once only.
- **Amount** - Enter the amount of this fee, $15.
- **Day due** - Enter the number of days after the main rental payment is due when the late fee is charged. In this example, if the tenant is 3 days late paying the rent, they incur the $15 fee.

5. Go to the *Late Fees* frame and set up the second late fee. In the row for the *Second* fee, enter values for the second fee:

- **Type** - Once only.
- **Amount** - Enter the amount of this fee, $25.
- **Day due** - Enter the number of days after the main rental payment is due when the late fee is charged. In this example, if the tenant is 10 days late paying the rent, they incur the $25 fee.

Click **OK**. The new Fees are saved and available.
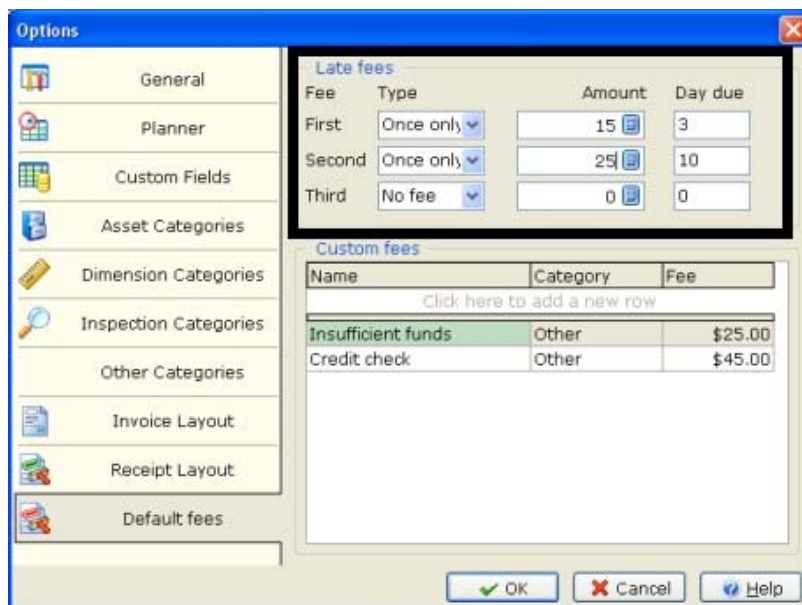
6. To charge a Tenant a Late Fee, in the **Tenant** screen or the **Income** screen, click the **Add Monies Due** button, to view its menu. The menu now includes the late fees. Select **Add Late Fee**.
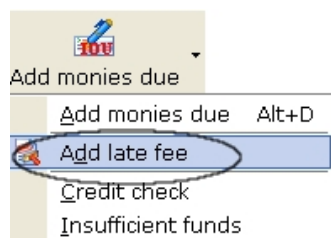
7. The Income Details screen displays. Select the Tenant, and the late fee is automatically calculated. The tenant below receives both late fees, for being 3 days late and then 10 days late. Enter the information about the fee, and why it is being charged.

8. You can use this screen to generate an invoice for this late fee. To do this, click **Invoice.**

9. Once you have created and saved the invoice, click **OK**.

10. The late fees are recorded against the tenant.

Income Due Details Screen Values

- **Tenant -** Select the Tenant who paid the Income.
- **Category** - Select the Category of income.
- **For Period** - Select the date period that this income will be applied against.
- **Date due** - Select the date when the Income was due.
- **Date paid** - Enter the date when the Income was received, if this applies.
- **Late amount** - This value automatically displays.
- **Late Fee** - The amount of late fees due; this value is automatically calculated. You can edit this amount, if required.
- **Reference** - Enter any reference or late fee charge type.
- **Notes** - Enter any notes about the income.
- **Invoice** - Click this button to automatically generate a printable or emailable Invoice file.

Creating Custom Fees

This tutorial describes how to create and charge a custom fee.

A custom fee is a charge against a tenant, or another form of property-related income. Examples of custom fees are: extra deposits for pets, a charge to pay for a credit check, or lawn mowing or other non-standard maintenance fees. You can create custom fees and apply them to tenants.

As an example, the user will create and charge a custom fee of *Credit Check*, charging $45.00 for this.

Creating the Custom Fee

1. the **Tools** menu, click **Options**.
2. The **Options screen** displays.
3. Select the **Default Fees** option.
4. Go to the *Custom Fees* frame and set up the new fee. Click to add a new row, then enter values for:

- **Name** - Name of the new custom fee.
- **Category** - Category that applies to the new fee.
- **Fee** - Amount of the fee.
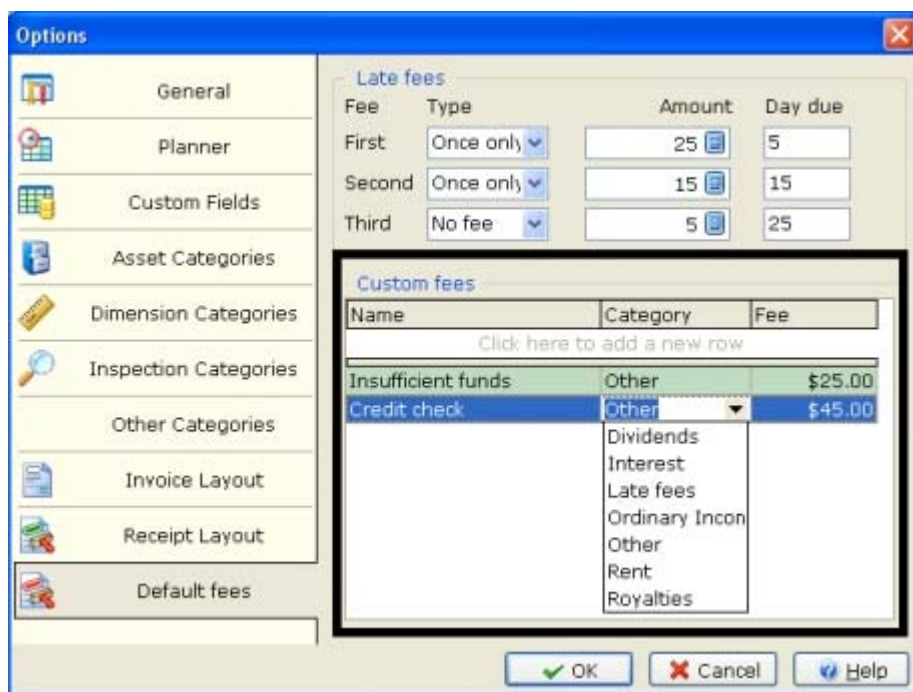
5. Click **OK**. The new Fee is saved and available.
6. To charge a Tenant a Custom Fee, in the **Tenant** screen or the **Income** screen, click the **Add Monies Due** button, to view its menu. The menu now includes the custom fees, including Credit Check. Select Credit Check.
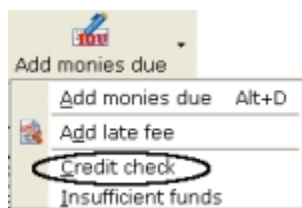
7. The Income Details screen displays, with information about the custom fee being charged to the tenant. Enter the information about the fee, and why it is being charged.

8. You can use this screen to generate an invoice for this custom fee. To do this, click **Invoice.**

9. Once you have created and saved the invoice, click **OK**.

10. The monies due are recorded against the tenant.

Income Due Details Screen Values

- **Tenant - Select the Tenant who paid the Income.**
- **Category** - Select the Category of income.
- **For Period** - Select the date period that this income will be applied against.
- **Date due** - Select the date when the Income was due.
- **Amount Due** - Enter the amount due.
- **Notes** - Enter any notes about the income.
- **Invoice** - Click this button to automatically generate a printable or emailable Invoice file.

Pro Rating a First Rent Payment

This tutorial describes how to set up a **pro rated** first rental payment.

You can set up a Tenant so that their first rent payment is pro rated. Pro rating a rent payment means that the Tenant only pays for part of a rent period. This can be done as a promotion, or to reflect the amount of time a Tenant is in tenancy for that first rent period.

In this example, a rent period is two weeks, but the tenant has moved in on a Wednesday. As a result, they are in residence for ten days of a two week rent period, and the rent needs to be prorated.

Setting up a tenant with pro rated rent

1. Go to the **Tenants** screen.

2. Click on the **Add Tenant** ![Add] button.

3. The **Tenant Details** screen displays.

4. Enter the Tenant Data by typing or selecting the information into each field. If a data field is <mark>yellow</mark>, that data is required for the tenant record. If a data field is white, that data is optional.

5. To set up a pro rated rent period for a tenant, edit the Property values for the Tenant Details. You must enter all of the following values, selected in the sample screen below:

   - **Rent Period** - Amount of time for which the tenant pays rent; weekly, biweekly, or monthly.

   - **Rent** - Rent amount.

   - **Rent Start Date** - Date when the tenant's first rent payment was due.

   - **First full rent period** - The date when the first full rent period for the tenant begins.

   - **Pro rate initial rent** - Check this box to pro rate the first rent amount due.

6. When all the data is entered, click **OK**.

7. The Tenant data is saved. The Tenant's first rental payment due is pro rated. It is calculated based on the rent start date, compared to the first full rent period. This displays automatically, in an I**ncome Details** screen:

8. You can use this screen to generate an invoice for this first rental payment. To do this, click **Invoice.**

9. Once you have created and saved the invoice, click **OK**.

10. The tenant details display in the main screen. Note that the values for the rent due and the standard rent are different.

Recording Payments from Multiple Tenants

This tutorial describes how to record payments received from more than one tenant at a time.

This function is very useful if you have multiple tenants paying rent, by direct deposit into a bank account, on the same day.

In this example, the date is February 6, 2008. The user has checked their bank account and seen that two tenants have paid by direct deposit on their due date. They both need to be marked as having paid.

Recording payments from multiple tenants

1. Go to the **Tenants** screen.

2. To select multiple tenants, press the Ctrl key on the keyboard while clicking tenants with the mouse. Each tenant the user clicks is selected. In this example, two Tenants are selected.

Tenant		Rent					
Name	Active	Owing	Due	Current Rate △	Next Due	Re	Property
Hiropi, Hana Ms	☑	$375.00	2/6/2008	$375.00	3/6/2008	1/(	Miramar
Shore, Emily Ms	☑	$294.64	2/6/2008	$375.00	2/17/2008		Grey St

2. In the toolbar, go to the Mark as Paid button. From its menu, click on Mark Selected as Paid.

Mark as paid

    Mark as paid
    Mark selected as paid
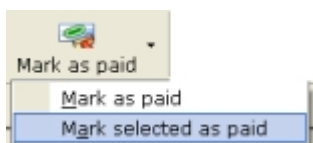
3. When prompted, enter the date of the payment.

4. The selected tenants are marked as Paid. Note that their amount Owing now displays as zero.

`

Tenant		Rent					
Name	Active	Owing	Due	Current Rate △	Next Due	Re	Property
Hiropi, Hana Ms	☑	$0.00	2/6/2008	$375.00	3/6/2008	1/(	Miramar
Shore, Emily Ms	☑	$0.00	2/6/2008	$375.00	2/17/2008		Grey St

Support and Source IT

Downloading and Installing Updates

To download and install updates:

1. Go to the Source IT web site, http://www.sourceitsoftware.com/
2. Download the latest version of the software.
3. Install the latest version in the same location as your original version. This will update your installation.
4. You are now ready to use your updated version of RPM.

NOTES: You do not need to uninstall RPM before updating. Nor do you need to re-enter your registration key. If you need a new registration key, please contact support@sourceitsoftware.com

Ordering and Registering

If you are reading your manual, you might have ordered Rental Property Manager already - or you may be ready to go from your evaluation version to a full licensed copy with support.

We have three payment options:

Register and pay online with our Secure Server (Credit Card only!)

- Direct your browser to http://www.sourceitsoftware.com/
- Follow the instructions.

Via E-mail (Credit Card only!)

- Send an e-mail to sales@sourceitsofware.com. Include your name, address, credit card type (Visa, master card etc), number and expiry date and the application you are purchasing.
- For extra security, you can send part of the credit card number in your main e-mail and the rest in another. To do this, write your number as 4545-5555-xxxx-xxxx in the first e-mail and then xxxx-xxxx-2121-2121 in the second.

Alternative Payment Methods - If you wish to pay via check or international money order, contact sales@sourceitsoftware.com .

About Source IT

Source IT is a small software development shop based in Hastings, New Zealand. We specialize in affordable graphic and data solutions for individuals and small businesses. Because we are small, we have a close relationship with users of our software products. Our development is driven by user requests and feedback, giving users the solutions they want and need.

Other Source IT products include:

- **Pics Print** - Pics Print is a must-have for users with digital cameras and images. It allows you to rapidly output quality prints from the images on your computer, digital camera or scanner. WYSIWYG editing allows you to lay out your images on screen exactly as they will appear on paper. Wizards allow you to easily perform common printing tasks, such as creating Posters (up to a huge 20x20 pages), greeting cards and thumbnail sheets.

- **M3 Manager** - The complete Management and Viewing solution for large collections of images and multimedia files. Smart Pix allows you to quickly and easily catalogue and search your files using keywords and descriptions. M3 Manager supports 39 + image formats, v12+ video formats, sound, text, PDF, HTML and Office formats. It offers advanced viewing and file management features, as well as file encryption, password protection and HTML and e-mail support.

Source IT Technical Support

Source IT provides support for our customers who purchase our software.

To send an e-mail query for support, log into our web site at http://www.sourceitsoftware.com/contact.htm. This page includes a form where you can enter your support query. We are a small company and all our tech support queries receive direct, personal attention. At the same time, if your query is about using the program, we recommend that you check the online help first to see if your query can be answered that way.

Contact Source IT care of:

Source IT
705 Pakowhai Rd
Hastings
NEW ZEALAND

http://www.sourceitsoftware.com
sales@souceitsoftware.com
support@sourceitsoftware.com

Rental Property Manager License Details

1. Distribution

This shareware software, Rental Property Manager (RPM) may be freely distributed, provided that:

- Such distribution includes only the original archive supplied by Source IT. You may not alter, delete or add any files in the distribution archive.

- The distribution does not include a registration number or information on disabling the features. You are also forbidden from distributing registered version of RPM.

- No money is charged to the person receiving the software, beyond reasonable cost of packaging and other overhead. The distribution does not include a registration number or information on disabling the features.

You are also forbidden from distributing a registered version of RPM. For further information about redistribution of Source IT products e-mail us at sales@SourceITsoftware.com.

2. License

By receiving and/or using Source IT software products, you accept the following Evaluation and Registered User Agreement. This agreement is a binding legal agreement between Source IT and the purchasers, users or evaluators of Source IT's software and products.

3. Evaluation (Unregistered) and Registered User Agreement

You may evaluate RPM for maximum of thirty calendar days, after which you must register the program with Source IT or remove the software from your computer. You may allow other users to evaluate copies of the unregistered Shareware. All evaluation users are subject to the terms of this agreement.

The evaluator/user/buyer/owner is not allowed to attempt to reverse engineer, disassemble or decompile Source IT software and products.

Source IT's name and any logo or graphics file that represents our software may not be used in any way to promote products other than our software. All parts of Source IT software and products are copyright protected. No program, code, part, image, video clip, audio sample, text or computer generated sequence of images may be copied or used in any way by the user except as intended within the bounds of the single user program.

The evaluator/user/buyer/owner of Source IT software will indemnify, hold harmless, and defend Source IT against lawsuits, claims, costs associated with defense or accusations that result from the use of Source IT software.

Source IT is not responsible for any damages whatsoever, including loss of information, interruption of business, personal injury and/or any damage or consequential damage without limitation, incurred before, during or after the use of our products. Our entire liability, without exception, is limited to the customers' reimbursement of the purchase price of the software (maximum being the suggested retail price as listed by Source IT) in exchange for the return of the product, all

copies, registration papers and manuals, and all materials that constitute a transfer of ownership from the customer back to Source IT.

Each registered copy of Source IT software may be used in only one single location by one user. Use of the software means that you have loaded the program and run it or have installed the program onto a computer. If you install the software onto a multi-user platform or network, each and every individual user of the software must be registered separately, except only in the case of a multiple user site licence, in which case you are limited to the number of users as expressly stated on your multiple user site licence contract.

You may make one copy of the registered software for backup purposes, providing you only have one copy installed on one computer being used by one person.   If any person other than yourself uses Source IT's software registered in your name, regardless of whether it is at the same time or different times, then you are considered to be in violation of this agreement.

The distribution does not include a registration number or information on disabling the features. You are also forbidden from distributing registered versions of Source IT software, or of Source IT software documentation.

The sale of and or distribution of registered copies of this software is strictly forbidden. It is a violation of this agreement to loan, rent, lease, borrow, or transfer the use of registered copies of Source IT software products.

Index