

# Units:

Unit Maintenance allows managers to track the Units associated with each Property in great detail.

The Main Tab for Unit Maintenance is similar to that of

Property Maintenance, harboring the static information including Address, Current & Future Tenants, and Unit Type.

Tracked financial information for Units includes Period-to-Date, Year-to-Date, and Previous Year Cash Received and Cash Paid.

The Charges Tab allows managers to setup default charges and deposits for each Unit. When the Unit is selected in Lease Maintenance, a charges dialog will appear. At this time these

defaults can be accepted or changed to meet the terms of the lease.

Another 15 User Definable Fields are available for each Unit and pictures and floor plans can also be

attached and maintained.

The Asset Management System integrates with Unit Maintenance, allowing managers to attach an asset to a Unit and track its use and service.



The Amenities Tab is unique in that it allows managers to track the various amenities of a Unit by Code, Description and Option. The Option can be a description of the condition of the amenity or the number of this amenity that exist per Unit.

## Quick Facts

- Managers can setup default General Ledger posting accounts in the third segment for posting revenue and expenses for a Unit.
- Provides fields for tracking the amenities of a Unit such as the number of bedrooms, patios, parking spaces, etc.

### Frequently Asked Questions

Our Units often come furnished or with major appliances such as a refrigerator or dishwasher. Can these items be tracked by PM2000?

### Answer:

Through PM2000's Asset Management System, items can be tracked by category and attached to specific Units. Warranty and Service information can be tracked and maintained as needed. Users also have the ability to attach scanned or digital pictures to the Asset's File.

# Setup, Maintenance, & Inquiries

Property: MAIN Name: 123 Main St Business Park Category: C  
 Unit: 105 Name: Project: OFFICES

1 Main | 2 Charges | 3 UDFs | 4 Pictures | 5 Unit Assets | 6 Amenities

Address: 123 S. Main St Current Tenant: TEST - Not on File  
 Zip: 92715 Next Tenant: None  
 City: Irvine State: CA Unit Type: 2BRU Req Months: 0  
 Sq Footage: Price / Sq Foot: 0.00  
 Sales/Costs to G/L Sub Acct: Last Move-Out Date: Deactivate Unit:

Months Occupied: Period to Date: Year to Date: Last Year: Future History Service  
 Cash Received: .00 .00 .00 Floors: 0 Baths: 0  
 Cash Paid: .00 .00 .00 Pkgs: 0 Parking: 0

Accept Cancel Delete PM2

Customer Number	Name	Start Date	End Date	Status/Moveout Date	Rent Amount	Rent Per Sq Foot	Deposits Held
ABF	American Business Futures	09/21/96	12/21/02	Current	2,699.99	1.80	1,855.00

OK

## Unit Maintenance - Drill Down Leases

The Lease Drill Down allows managers to view all leases attached to the Unit currently being viewed. All leases will be shown including Past, Current, and Future.

## Unit Maintenance - Main Tab

Managers can set up a default General Ledger Account in the third segment to post revenue and expenses to by Unit.

Units can also be "deactivated." These may be units that split and merge often. Deactivated units are not included in vacancy statistics.

## PM Tip

Unit Maintenance offers tabs for User-Defined Fields and Pictures just as Property Maintenance does. User Defined fields are set up in the Setup Menu of the Property Management Module.

Property: MAIN Name: 123 Main St Business Park Category: C  
 Unit: STE101 Name: ABF Project: OFFICES

1 Main | 2 Charges | 3 UDFs | 4 Pictures | 5 Unit Assets | 6 Amenities

Default Billing Cycles: Monthly

**Default Recurring Charges** OK Undo Remove  
 Charge Code: RENT Amount: 1,500.00  
 RENT REVENUE  
 Track:  Allocation Code:

**Default Deposits** OK Undo Remove  
 Charge Code: DEPOSIT Amount: 1,500.00  
 RENT DEPOSIT

Code	Type	Description	Amount
RENT	Rent	RENT REVENUE	1,500.00
PARKIN	Rent	PARKING RENTS	25.00

Code Type Description Amount  
 DEPOSIT Dep RENT DEPOSIT 1,500.00  
 SECUR Dep SECURITY DEPOSIT 1,500.00

Accept Cancel Delete PM2

## Unit Maintenance - Charges Tab

Set up rent and any other charges that are included on the signed lease. The Vacancy Report utilizes this information when it is run.

Property: MAIN Name: 123 Main St Business Park Category: C  
 Unit: STE101 Name: ABF Project: OFFICES

1 Main | 2 Charges | 3 UDFs | 4 Pictures | 5 Unit Assets | 6 Amenities

Asset Code: REF4 Tenant Rent Refrigerator 4 Status: Active  
 Asset Category: KITCHEN Kitchen Appliances Purchased Date: 05/02/02  
 Manufacturer: Kenmore Warranty Expires: 05/02/03  
 Mfr Product Code: F250Ww In Service:  Out of Service:   
 Mfr Serial Number: 25125894 Last Serviced:  Asset Cost: 846.00

Asset Code	Description	Asset Category	Manufacturer
REF4	Tenant Rent Refrigerator 4	KITCHEN	Kenmore

OK  
 Undo  
 Deactivate  
 Transfer

Accept Cancel Delete PM2

## Unit Maintenance - Unit Assets Tab

Once an Asset has been created and entered into the system, it can be assigned to a specific unit. The Asset Management system will track all transfers of assets as well as any maintenance done to them.