



Resident Management - RM User Guide

Version 1.4
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Revision History

Date	Version	Description	Author
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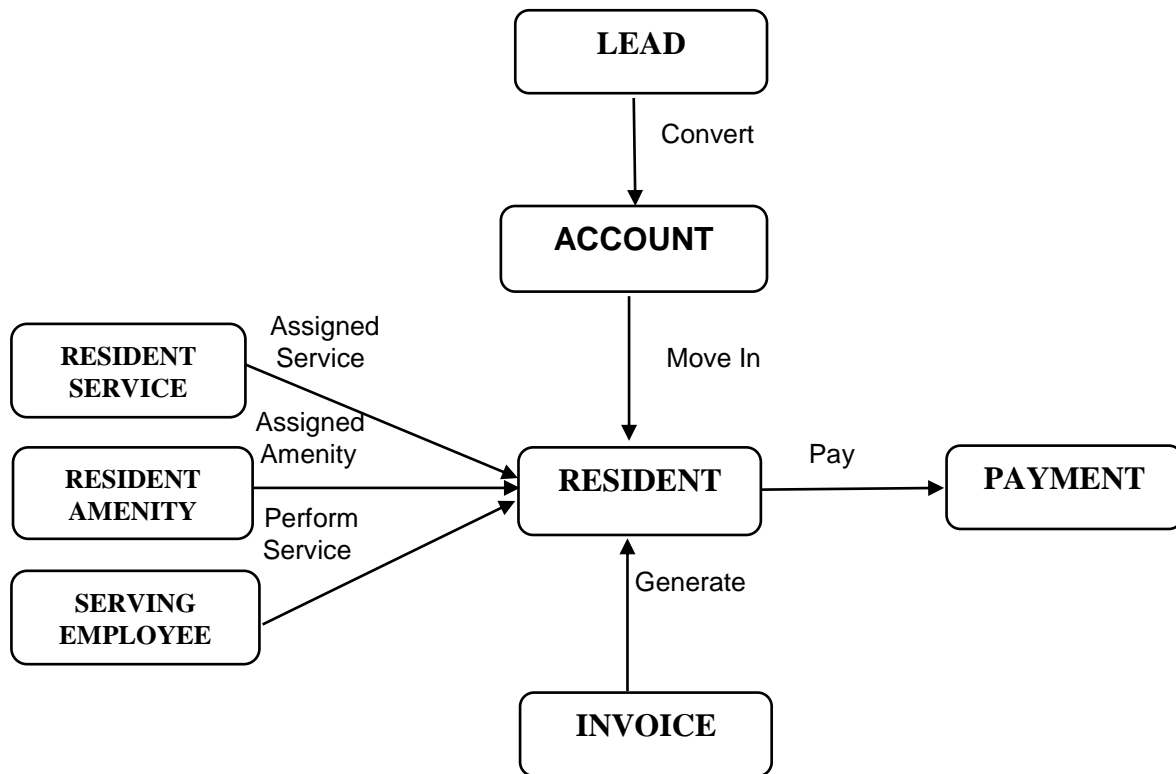
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1. Introduction

Resident Management Application is used to manage residents living a property. This can be used in Senior Living Homes, Nursing Homes, Vacation Homes, Retirement Homes, Property Management Companies, Hospitals and Hotels. Features include Move-in, Move-Out, Billing, Payment, Configuration, Reports and Dashboards.

A Lead is converted into an Account and then moved into a Room / Bed to become a Resident. Residents receive various services from the Property employees. An Invoice is generated and a payment is accepted against that invoice. The following diagram shows the workflow of this application.

Flow Diagram:

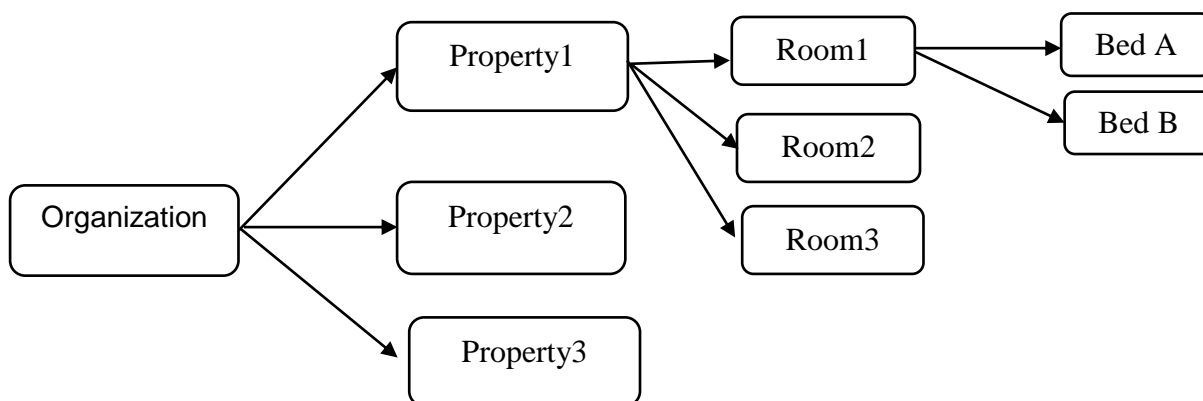


2. Admin

If the Privilege “**Administer RM Setup**” is assigned to the profile, then the user can access the RM Admin tab.

This page has the following Sub tabs:

- Privilege
- Property
- Amenities
- Services
- About Us

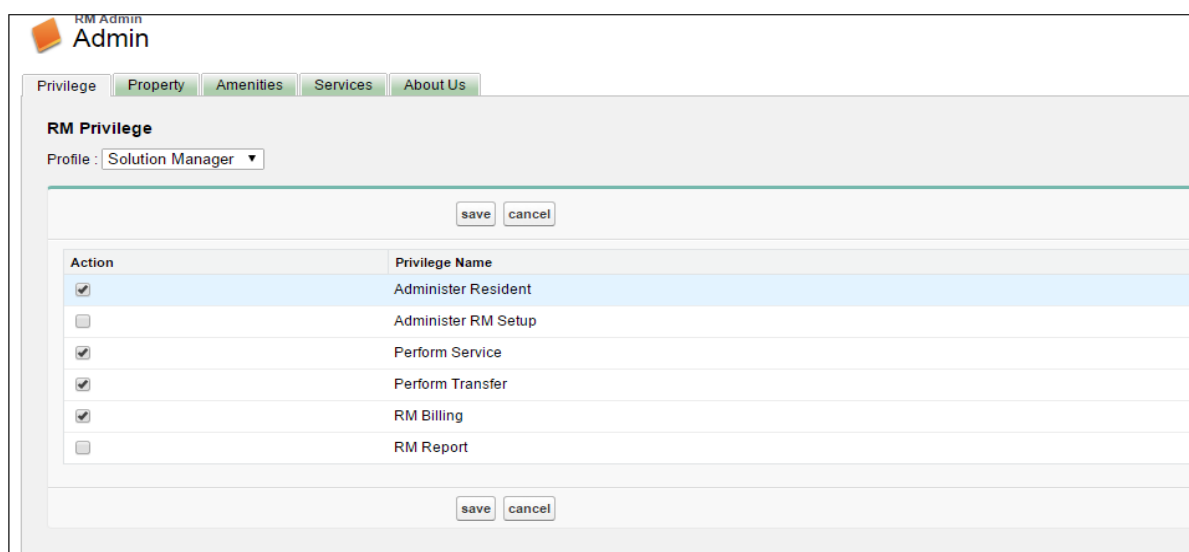


2.1 Privilege

The Privilege tab visible only for 'System Administrator' Profile. Admin user can set the Privileges for profiles. Please refer Appendix A for the privilege list.

Appendix A:

#	Permission Set	Privileges
1	Administer Resident	Resident Service, Serving Employee and Resident Amenities.
2	Administer RM Set up	RM Admin Tab
3	Perform Service	Perform service Tab
4	Perform Transfer	Move in, Move out and Transfer
5	RM Billing	RM Billing Tab
6	RM Report	RM Report Tab



The screenshot shows the 'RM Admin' interface with the 'Privilege' tab selected. The 'Profile' dropdown is set to 'Solution Manager'. The table below lists the privileges and their corresponding actions.

Action	Privilege Name
<input checked="" type="checkbox"/>	Administer Resident
<input type="checkbox"/>	Administer RM Setup
<input checked="" type="checkbox"/>	Perform Service
<input checked="" type="checkbox"/>	Perform Transfer
<input checked="" type="checkbox"/>	RM Billing
<input type="checkbox"/>	RM Report

2.2 Property

Property is the facility or building or community where the residents stay. This page contains Property Name, Address, City, Country and Phone number.

RM Admin Admin

Privilege Property Amenities Services About Us

RM Property

New Property

Action	Property Name	Address	City	Country	Phone No
Edit Del	Dallas Property	234 Broad St	Dallas	USA	2812342345
Edit Del	Austin Property	123 Main St	Austin	USA	2811231234
Edit Del	Houston Property	101 Sam Houston Ave	Houston	USA	8321231234
Edit Del	Jackson Property	5760 Timuquanna Rd	Jacksonville	USA	2522525353
Edit Del	San Property	67321 West Siam St.	San Francisco	USA	3526523245

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Properties can be added /edited /deleted using the appropriate actions on the page. To inactivate a Property, uncheck the Active checkbox

Property Edit

Save Save & New Cancel

Property Name

Address

City

State

Country

Postal Code

Owner One Reviewer

Phone

Fax

Active ☒

Save Save & New Cancel

2.2.1 Rooms

Property contains Rooms and Room contains beds. If the Rooms are shared, then Beds can be rented separately. For non-sharable rooms, a bed is added by default, additional beds cannot be added.

Rooms

New Room

Rooms Help ?

Action	Room Name	Room Type	Room Size	Active
Edit Del	Room 101	Delux	1400 sqft	<input checked="" type="checkbox"/>
Edit Del	Room102	Suite	142	<input checked="" type="checkbox"/>
Edit Del	Room 102	Delux	1400 sqft	<input checked="" type="checkbox"/>

Rooms can be added / edited / deleted by choosing the appropriate action from the page The Room contains following fields:

- Room Name - The room name of the property, for e.g., Room 101.
- Property - The name of the Property, for e.g., Austin Property.
- Room Type - The type of room, for e.g., standard, Deluxe or suite.
- Room size - size for rooms.
- Furnished - The room will be furnished, to check the furnished checkbox.
- Active - To inactivate a room, uncheck this active checkbox

2.2.2 Beds

Beds are part of the room and are assigned a charge to be used in the invoice.

Beds New Bed Beds Help ?				
Action	Bed Name	Bed Type	Bed Rate	Active
Edit Del	Bed A	Queen	\$142.00	<input checked="" type="checkbox"/>
Edit Del	Bed B	Twin	\$40.00	<input checked="" type="checkbox"/>
Edit Del	Bed C	Twin	\$46.00	<input checked="" type="checkbox"/>
Edit Del	Bed D	Queen	\$451.00	<input checked="" type="checkbox"/>

[^ Back To Top](#) Always show me [fewer](#) / [more](#) records per related list

Beds can be added / edited / deleted by choosing the appropriate action from the page. The Bed contains following fields:

- Bed Name – The bed name of the Room, for e.g., Bed A.
- Bed Rate – The Rate of the Bed.
- Rate period – The rate period of the Bed, for e.g., monthly, weekly or daily.
- Bed Type – The type of Bed, for e.g., standard, twin, king or queen.
- Active -- To inactivate Bed, uncheck the active checkbox.

Bed Edit		Save	Save & New	Cancel
Bed Name	<input type="text" value="Bed A"/>			
Bed Rate	<input type="text" value="500.00"/>			
Rate Period	<div>Weekly</div> <div>Daily</div> <div>Weekly</div> <div>Monthly</div>			
Room	<input type="text" value="Room 101"/>			
Bed Type	<input type="text" value="King"/>			
Active	<input checked="" type="checkbox"/>			
Owner	Veeralakshmi Durai			
		Save	Save & New	Cancel

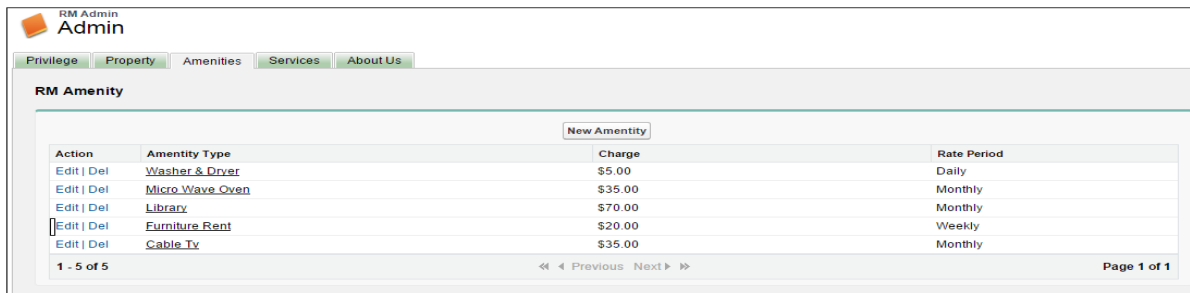
2.2.3 Property Users

Property Users are the employees of that Property. It can be added / edited / deleted by choosing the appropriate action from the page.

User Property Edit		Save	Save & New	Cancel
UPID-4				
User Property Edit				
Information				
Property Name	<input type="text" value="Dallas Property"/>			
User Name	<input type="text" value="One Reviewer"/>			
		Save	Save & New	Cancel

2.3 Amenities

Amenities provided by the property to the residents can be setup, amenities have a charge and a rate frequency.



RM Admin Admin

Privilege Property Amenities Services About Us

RM Amenity

New Amenity

Action	Amentity Type	Charge	Rate Period
Edit Del	Washer & Dryer	\$5.00	Daily
Edit Del	Micro Wave Oven	\$35.00	Monthly
Edit Del	Libraray	\$70.00	Monthly
Edit Del	Furniture Rent	\$20.00	Weekly
Edit Del	Cable Tv	\$35.00	Monthly

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Amenity can be added / edited / deleted by choosing the appropriate action from the page.

The Amenity contains following fields:

- Amenity Type - The Type of Amenity, for e.g., washer & dryer.
- Rate Period - The Rate period of amenity, for e.g., Daily, Monthly or Weekly.
- Charge - The charge of the Amenity.
- Owner - The name of the user.



Amenity Edit

Save Save & New Cancel

Information

Amenity Type

Rate Period

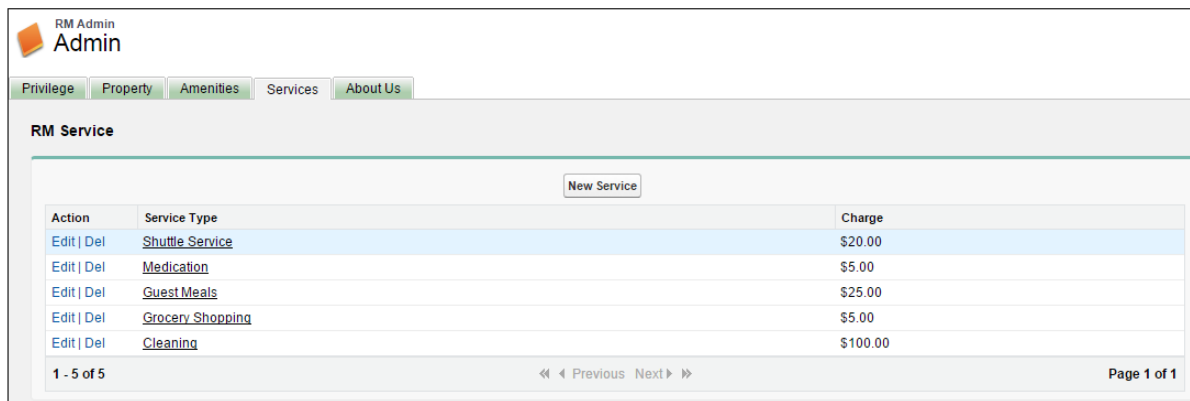
Charge

Owner Veeralakshmi Durai

Save Save & New Cancel

2.4 Services

All the Services, the property offers to residents are listed on this tab, services have a charge as well.



RM Admin Admin

Privilege Property Amenities Services About Us

RM Service

New Service

Action	Service Type	Charge
Edit Del	Shuttle Service	\$20.00
Edit Del	Medication	\$5.00
Edit Del	Guest Meals	\$25.00
Edit Del	Grocery Shopping	\$5.00
Edit Del	Cleaning	\$100.00

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Services can be added / edited / deleted by choosing the appropriate action from the page.

The service contains following fields:

- Service Type - The type of Service, for e.g. cleaning, grocery Shopping.
- Charge - The Charge of the Service.
- Charge as per occurrence - To inactivate Charge as per occurrence, uncheck this checkbox.
- Owner - The name of the user.

Service Edit

Save

Save & New

Cancel

Information

Service

Shuttle Service

Charge As Per Occurrence

☒

Charge

20.00

Owner

Veeralakshmi Durai

Save

Save & New

Cancel

2.4.1 User Service

User Services are the services an employee can perform for the resident. This page shows all the list of services that can be assigned to the individual user.

User Services

New User Service

User Services Help ?

Action	User Name
Edit Del	Veeralakshmi Durai
Edit Del	One Reviewer

User Services can be added / edited / deleted by choosing the appropriate action from the page. The User Service contains following fields:

- Service Name –The name of the service, for e.g. Medical Services.
- User Name –The name of the user.

User Service Edit

New User Service

User Service Edit

Save

Save & New

Cancel

Information

Service Name

Medical services

User Name

Gandhimathi B

Save

Save & New

Cancel

3. Account Management

3.1 Leads

Leads are collected in salesforce using their standard Leads page. In order to assign a property to a lead, a custom page layout needs to be used and tis feature is available only on Enterprise Edition and above. To use the custom layout, the Admin user should assign the Lead Layout (Installed Package: Resident Management) to any one of the Profiles.

Lead Detail		Edit Delete Convert Find Duplicates	
Lead Owner	Veeralakshmi D [Change]	Phone	(654) 678-3477
Name	Mr. WILLIAM JOHN	Mobile	
Company	Ray Minchew	Fax	
Title		Email	
Lead Source	Phone Inquiry	Website	
Industry		Lead Status	Open - Not Contacted
Annual Revenue		Rating	
RM Property	Atlanta properties	No. of Employees	
Address	345 Sugar Blvd. Persistance, NY 73467 United States		
Product Interest		Current Generator(s)	
SIC Code		Primary	
Number of Locations			
Created By	Veeralakshmi D , 2/2/2016 7:20 PM	Last Modified By	Veeralakshmi D , 2/2/2016 7:20 PM
Description			
Edit Delete Convert Find Duplicates			

3.2 Accounts

The qualified leads are converted into Accounts. Accounts are eligible to be moved in to a Room / bed to become a resident, For Enterprise Edition or higher, a custom Page layout is available, which shows the Property the accounts belongs to.

To use the custom layout, the Admin user should assign the Account Layout (Installed Package: Resident Management) to any one of the profiles, then RM Property and Resident section will display in the Account detail page.

- RM Property – The property to which the account belongs to.
- Resident Section - Provides feature to Move in, Move out and Transfer the resident.

Account Detail		Edit Delete	
Account Owner	Veeralakshmi D [Change]	Rating	
Account Name	GEORGE [View Hierarchy]		
Parent Account		Phone	(208) 081-8530
Account Number		Fax	
Account Site		Website	
Type		Ticker Symbol	
Industry		Ownership	
Annual Revenue		Employees	
RM Property	Atlanta properties	SIC Code	
Active	Yes		
Billing Address	123 Anywhere Street Santa Fe, CA 32178 USA		
Customer Priority		SLA	
SLA Expiration Date		SLA Serial Number	
Number of Locations		Upsell Opportunity	
Created By	Veeralakshmi D , 5/11/2015 4:05 PM	Last Modified By	Veeralakshmi D , 2/2/2016 7:23 PM
Description			

The Resident management (account layout) assign to the user profile this section will be visible.

This section provide facility to Move out, Transfer the Resident

Resident		Transfer Move Out	
Property	Room		
Jackson Property	Room 102		

3.3 Contacts

Contacts are people associated with the account. For each contact, information, such as phone numbers, addresses etc., can be saved. For Enterprise Edition or higher, a Custom Page layout is available, to use the custom layout, the Admin user assigns the Contact Layout (Installed Package: Resident Management) to any one of the profiles, Relationship field will be displayed in Contact detail page.

Contact Detail

Edit
Delete
Clone
Request Update

Contact Owner	Veeralakshmi D [Change]	Phone	(712) 712-7123
Name	Mr. DAVID RICHARD	Home Phone	
Account Name	GEORGE	Mobile	
Title		Other Phone	
Department		Fax	
Birthdate		Email	
Reports To	[View Org Chart]	Assistant	
Lead Source	Web	Asst. Phone	
		Relationship	Emergency Contact
Mailing Address		Other Address	
Languages		Level	
Created By	Veeralakshmi D , 5/11/2015 4:05 PM	Last Modified By	Veeralakshmi D , 2/2/2016 7:25 PM
Description			


Edit
Delete
Clone
Request Update

4. Resident Management

When an account is moved into a Room / bed, he becomes a Resident. If the Privilege “**Administer Resident**” or “**Perform Service**” is assigned to the profile, then the user can access the ‘RM Resident’ tab. This tab shows all Resident details such as resident Name and their property, room, bed and the resident Move in Date can be listed.

This page has the following Sub tabs:

- RM Resident
- Perform Service


RM Resident Resident

RM Resident
Perform Service

RM Resident

Property: All Property
Resident Type: Active Resident
Go!

Action	Account Name	Property	Room	Bed	Move In Date
Transfer Move Out Rel	AIDEN	Jackson Property	Room 101	Bed C	12/01/2015
Transfer Move Out Rel	GEORGE	Jackson Property	Room 102	Bed B	12/01/2015
Transfer Move Out Rel	FEDRICK	Jackson Property	Room 102	Bed A	12/01/2015
Transfer Move Out Rel	MARIA MARTINEZ	San Property	Room 101	Bed C	12/01/2015
Transfer Move Out Rel	RICHARD	San Property	Room 102	Bed A	01/20/2016
Transfer Move Out Rel	ROBERT JOHNSON	Jackson Property	Room 102	Bed C	01/15/2016
Transfer Move Out Rel	MARIA RODRIGUEZ	Jackson Property	Room 101	Bed A	12/01/2015

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This list page has following filters,

- 1) **Property** – The name of the Property, for e.g., Austin property.
- 2) **Resident Type** – The type of the resident, for e.g. Prospect, Active Resident, and Inactive Resident.
 - i) **Prospect** – These are accounts which are not yet ‘**Moved in**’ to a Property.
 - ii) **Active Resident** – The resident was already moved in to the property

- iii) **Inactive Resident** – These are moved out Residents from a property, they are Treated as Inactive Residents.

This list page has following actions,

4.1 Move In

If the Privilege “**Perform Transfer**” is assigned to the profile, then the ‘Move In ‘action can be performed. The resident can be moved in to a room or bed within a property. If the Room is not sharable, then the account is moved into the default bed.

Account MoveIn

Move In Date

Property

Room

Bed

Bed Rate

4.2 Move Out

If the Privilege “**Perform Transfer**” is assigned to the profile, then the ‘Move Out ‘action can be performed. When a resident is moved out, it will make the account as inactive. One of the Move out Reason from the dropdown must be chosen.

Account Move Out

Account Name

Move Out Date

Move Out Reason

4.3 Transfer

If the Privilege “**Perform Transfer**” is assigned to the profile, then the ‘Transfer ‘action can be performed. Transfer of a resident is nothing but moving out from one room/bed and moving in to another room/bed.

Account Transfer

Account Name

Move In Date

Move in Date

Property

Room

Bed

Bed Rate

Property

Room

Bed

Bed Rate

4.4 REL

This section shows the related information of a resident such as; Serving Employee, Resident Service, and Resident Amenities.

Resident Detail				
Account Name	AIDEN		Property Name	Jackson Property
Room Name	Room 101		Bed Name	Bed C
Move In Date	1/12/2015 3:24 PM			

Serving Employees		New Serving Employee	
Action	User Name		
Edit Del	One Reviewer		

Resident Services				New Resident Service	
Action	Service Name	Start Date	Frequency		
Edit Del	Cleaning	1/1/2016	Daily		
Edit Del	Grocery Shopping	1/12/2015	Daily		


Resident Amentities			New Resident Amentity	
Action	Amentity Name	Start Date		
Edit Del	Micro Wave Oven	1/1/2016		
Edit Del	Cable TV	1/12/2015		

4.4.1 Serving Employee

An employee who manages all the activities of that resident, can be assigned from this section.

Serving Employees		New Serving Employee	
Action	User Name		
Edit Del	One Reviewer		

Serving Employee can be added / edited / deleted by choosing the appropriate action from the page.


Serving Employee Edit

URID-3

Serving Employee Edit
Save
Save & New
Cancel

Information

Account Name

User Name

Save
Save & New
Cancel

4.4.2 Resident Services

Services can be assigned to Residents from this page. This page show all the Service Name, Start date and their frequency.

Resident Services		New Resident Service	
Action	Service Name	Start Date	Frequency
Edit Del	Cleaning	1/1/2016	Daily
Edit Del	Grocery Shopping	1/12/2015	Daily

Resident Services can be added / edited / deleted by choosing the appropriate action from the page. The Resident Service contain following fields:

- Service Name –The name of the service.
- Start date and Stop date –The time interval for the service occurrence.
- Frequency - The frequency of the service, for e.g., Daily, Monthly or Weekly.
- No of occurrence – The number of occurrence of the service, for e.g., 1.



Resident Service Edit Save Save & New Cancel

Information

Account Name	<input type="text" value="AIDEN"/>	Service Name	<input type="text" value="Cleaning"/>
Start Date	<input type="text" value="1/1/2016"/> [3/2/2016]	Stop Date	<input type="text" value="31/1/2016"/> [3/2/2016]
Frequency	<input type="text" value="Daily"/>	No Of Occurrence	<input type="text" value="1"/>

Save Save & New Cancel


4.4.3 Resident Amenities

Resident amenity shows the list of amenities assigned to a resident. The list by default shows all the resident amenities, and their start date.

Resident Amenities		New Resident Amenity	
Action	Amentity Name	Start Date	
Edit Del	Micro Wave Oven	1/1/2016	
Edit Del	Cable Tv	1/12/2015	

Resident Amenities can be added / edited / deleted by choosing the appropriate action from the page. The Resident Amenity contains following fields:

- Amentity Name –The name of the Amenity.
- Start Date/End Date - The time interval for the resident amenity.



Resident Amenity Edit Save Save & New Cancel

Information

Account Name	<input type="text" value="AIDEN"/>	Amentity	<input type="text" value="Micro Wave Oven"/>
Start Date	<input type="text" value="1/1/2016"/> [3/2/2016]	End Date	<input type="text" value="31/1/2016"/> [3/2/2016]

Save Save & New Cancel

4.5 Perform Service

If the Privilege “**Perform Service**” is assigned to the profile, then the user can access the Perform Service page. This page automatically list the services which are all performed / not yet performed for the resident.

This list page has following filters,

- i) **Property** – The name of the Property, for e.g., Austin property
- ii) **User** -- The user name of the Property, for e.g., One Reviewer.
- iii) **Account Name** – The name of the resident.
- iv) **Service** – The name of the service, for e.g. cleaning.
- v) **Billing Period** –The Billing period of the service, for e.g., January 1 –January 31 2016

In this page the following buttons and links are available,

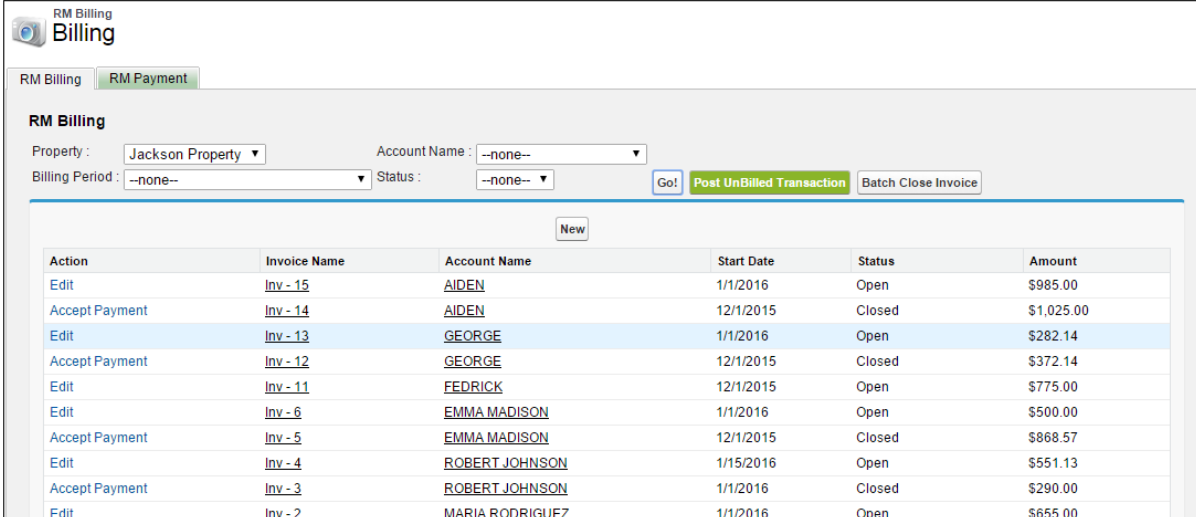
- 1) Add - To add new row for same service.
- 2) Del - To delete the row of service. This Del link will be shown only for services on open invoice.
- 3) Expand All - This link will expand the list of services
- 4) Collapse All - Collapse the services list.
- 5) New Service - To add a new service to be performed by the assigned user to resident.

5. Billing

Invoices can be generated for residents including their Room rent, amenities and services offered to them. If the Privilege “**RM Billing**” is assigned to the profile, then the user can access the RM Billing tab.

This page has the following Sub tabs:

- RM Billing
- RM Payment



The screenshot shows the 'RM Billing' interface. At the top, there are tabs for 'RM Billing' and 'RM Payment'. Below the tabs, there are filters: 'Property' (Jackson Property), 'Account Name' (--none--), 'Billing Period' (--none--), and 'Status' (--none--). There are buttons for 'Go!', 'Post UnBilled Transaction', and 'Batch Close Invoice'. A 'New' button is also present. Below the filters is a table with the following data:

Action	Invoice Name	Account Name	Start Date	Status	Amount
Edit	Inv - 15	AIDEN	1/1/2016	Open	\$985.00
Accept Payment	Inv - 14	AIDEN	12/1/2015	Closed	\$1,025.00
Edit	Inv - 13	GEORGE	1/1/2016	Open	\$282.14
Accept Payment	Inv - 12	GEORGE	12/1/2015	Closed	\$372.14
Edit	Inv - 11	FEDRICK	12/1/2015	Open	\$775.00
Edit	Inv - 6	EMMA MADISON	1/1/2016	Open	\$500.00
Accept Payment	Inv - 5	EMMA MADISON	12/1/2015	Closed	\$868.57
Edit	Inv - 4	ROBERT JOHNSON	1/15/2016	Open	\$551.13
Accept Payment	Inv - 3	ROBERT JOHNSON	1/1/2016	Closed	\$290.00
Edit	Inv - 2	MARIA RODRIGUEZ	1/1/2016	Open	\$655.00

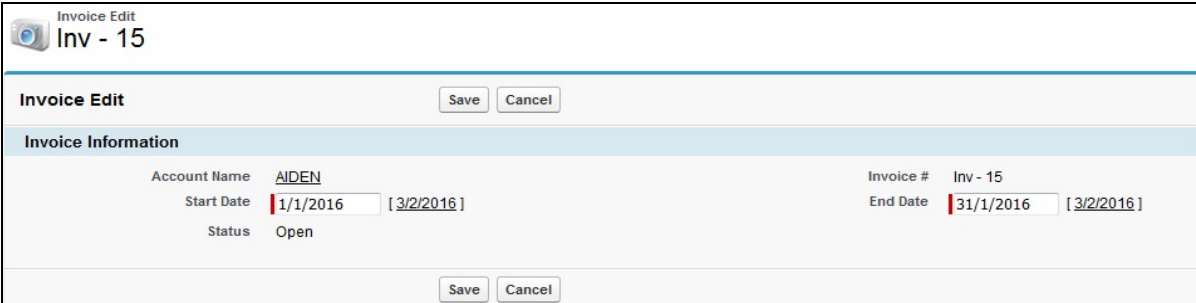
This list page has following filters,

- i) **Property** – The name of the Property, for e.g., Austin property.
- ii) **Account Name** -- The name of the resident.
- vi) **Billing Period** – The Billing period of the service, for e.g., January 1 –January 31 2016.
- iii) **Status** – The name of the status, for e.g., open or closed.

This list page has following buttons and links,

- i) **Post Unbilled Transaction** -- To post, unbilled item to the Open bill.
- ii) **Batch Close Invoice** – To close all the open invoices.
- iii) **Go** -- Searches the invoices based on filters.
- iv) **Accept Payment** -- Enabled on closed invoices, takes the user to the 'New payment' screen.

Invoice can be added / edited by choosing the appropriate action from the page.



The screenshot shows the 'Invoice Edit' interface for 'Inv - 15'. It has 'Save' and 'Cancel' buttons. Below is the 'Invoice Information' section:

Account Name	AIDEN	Invoice #	Inv - 15
Start Date	1/1/2016 [3/2/2016]	End Date	31/1/2016 [3/2/2016]
Status	Open		

At the bottom, there are 'Save' and 'Cancel' buttons.

5.1 View invoice


To view the invoice, click on the Invoice Name in the Invoice list page. This Section contains Invoice Detail, Invoice Items, Unbilled Items and payment Items.

The following are the fields of an Invoice item:

- Item date - The date of an item.
- Item Type - The type of item for e.g., Rent, services, or Amenities.
- Item - The name of item for e.g., Room charge, Grocery shopping.
- Quantity - The quantity of the item, for e.g. daily, weekly or Monthly.
- Amount - The amount of an item.
- Credit -- indicates whether a credit has been issued on this item.

Items not yet billed are shown in the Unbilled Item section on an open invoice. Payments against invoices are listed separately under the Payments section.

Open invoice:


Invoice
Inv - 15

Invoice Detail

Edit

Close Invoice

Account Name

AIDEN

Invoice #

Inv - 15

Start Date

1/1/2016

End Date

31/1/2016

Status

Open

Invoice Amount

\$ 985.00

Edit

Close Invoice

Invoice Items

New

Action	Item Date	Item Type	Item	Quantity	Unit Price	Amount	Credit
Edit Del	1/1/2016	Rent	Room Charge	1.00	\$985.00	\$985.00	<input type="checkbox"/>
						Grand total:	\$985.00

This section will visible only for open invoice


UnBilled Invoice Items

Post UnBilled Transaction

click this button this unbilled item will move to invoice item

Item Type	Item	Quantity	Unit Price
Amenities	Micro Wave Oven	1.00	\$35.00
Services	Cleaning	1.00	\$100.00

Close invoice:


Invoice
Inv - 12

Invoice Detail

Accept Payment

Issue Credit

Account Name

GEORGE

Invoice #

Inv - 12

Start Date

1/12/2015

End Date

31/12/2015

Status

Closed

Closed On

28/1/2016

Invoice Amount

\$ 372.14

Accept Payment

Issue Credit

Invoice Items

Item Date	Item Type	Item	Quantity	Unit Price	Amount	Credit
1/12/2015	Rent	Room Charge	4.43	\$75.00	\$332.14	<input type="checkbox"/>
1/12/2015	Amenities	Cable Tv	1.00	\$35.00	\$35.00	<input type="checkbox"/>
9/12/2015	Services	Grocery Shopping	1.00	\$5.00	\$5.00	<input type="checkbox"/>
					Grand total:	\$372.14

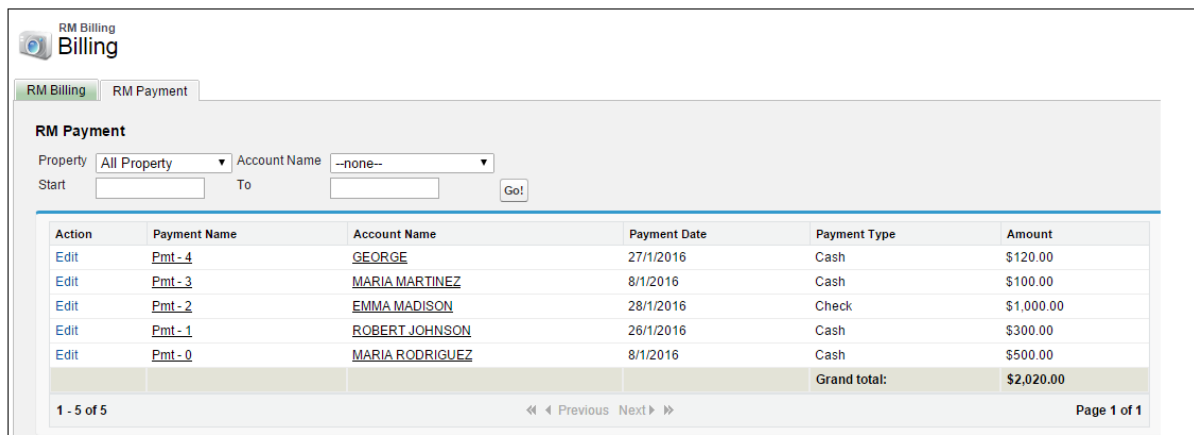
This section available only for closed invoices

Payment Detail

Payment#	Payment Date	Payment Type	Check #	Amount	Payment Description
Pmt - 4	27/1/2016	Cash		\$120.00	
				Grand total:	\$120.00

5.2 Payment

This is a Payment list page.



RM Billing
RM Billing RM Payment

RM Payment

Property: Account Name:

Start: To:

Action	Payment Name	Account Name	Payment Date	Payment Type	Amount
Edit	Pmt - 4	GEORGE	27/1/2016	Cash	\$120.00
Edit	Pmt - 3	MARIA MARTINEZ	8/1/2016	Cash	\$100.00
Edit	Pmt - 2	EMMA MADISON	28/1/2016	Check	\$1,000.00
Edit	Pmt - 1	ROBERT JOHNSON	26/1/2016	Cash	\$300.00
Edit	Pmt - 0	MARIA RODRIGUEZ	8/1/2016	Cash	\$500.00
Grand total:					\$2,020.00

1 - 5 of 5 Page 1 of 1

This list page has following filters,

- Property** – The name of the Property, for e.g., Austin property.
- Account Name** – The name of the resident.
- Start Date/End Date** – The time interval for payments.

5.2.1 View payment

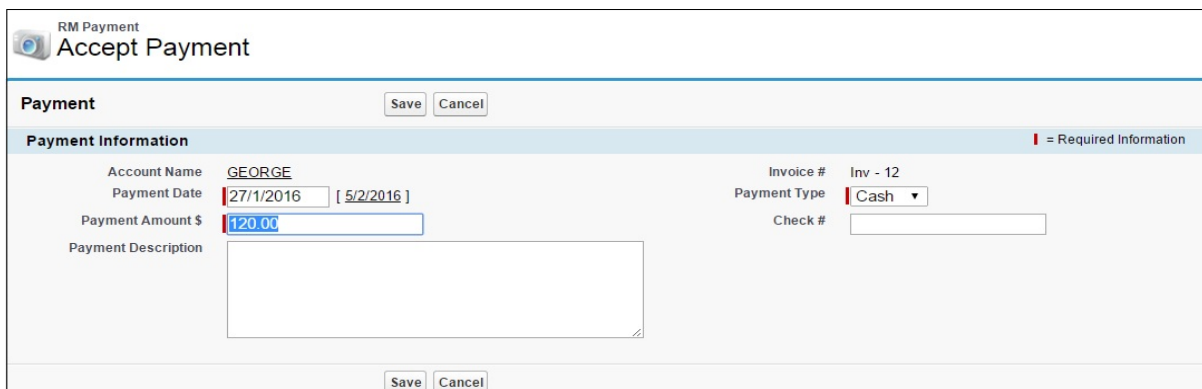
To view the payment amount for the resident. Click on the payment name from the list page.



Payment Detail

Account Name	GEORGE	Invoice #	Inv - 12
Payment Date	27/1/2016	Amount	\$120.00
Payment Type	Cash	Check #	
Payment Description			

Users can edit the Payment fields such as; Payment Date, Payment Type, Payment Amount, Check and Payment Description.



RM Payment
Accept Payment

Payment

Payment Information ! = Required Information

Account Name	GEORGE	Invoice #	Inv - 12
Payment Date	<input type="text" value="27/1/2016"/> [5/2/2016]	Payment Type	<input type="text" value="Cash"/>
Payment Amount \$	<input type="text" value="120.00"/>	Check #	<input type="text"/>
Payment Description	<input type="text"/>		

6. Report

If the Privilege **"RM Report"** is assigned to the profile, then the user can access the RM Report tab.

6.1 Report


This report page has following filters and buttons,

- Property – The name of the Property, for e.g., Austin property.
- Start Date/End Date – The time interval for reports.
- Type – The type of the report for e.g., Report or chart.
- Report –The name of the Report.
- Chart –The name of the chart.
- Run – Searches the report based on filters.
- Print –print the report based on filters.

Please refer Appendix B for the Report list.

Appendix B:

S.No	Report Name	Description
1	Move in Report	This Report shows the resident move in details by month grouped by property
2	Move out Report	This Report shows the resident move out details by month grouped by property
3	Late Payment Report	This Report shows the number of Over Due days by month grouped by property
4	Outstanding Payment Report	This report shows the resident outstanding payment by month grouped by property
5	Invoice Statement	This Report shows the detail of the invoice by month grouped by property
6	Task Sheet Report	This Report shows the services assigned to the user grouped by property


RM Report
Report

Property : Dallas Property Start Date : End Date :

Type : ☒ Report ☐ Chart
Report : Outstanding Payment Report Chart : Late Payment Trending

Outstanding Payment Report

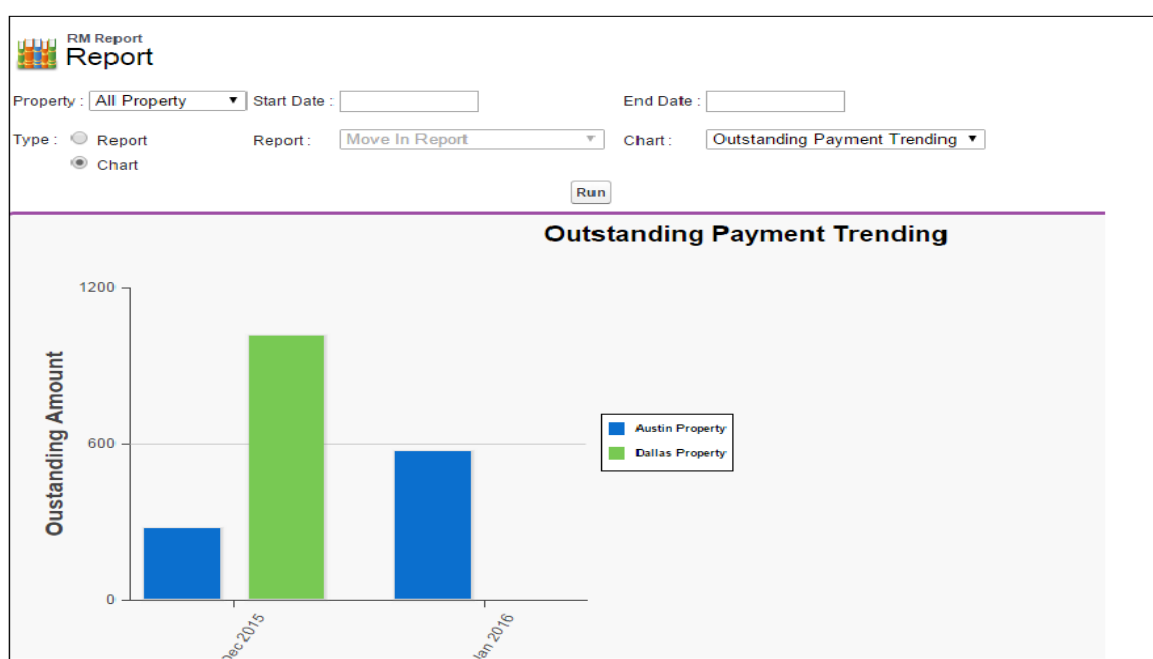
Account Name	Invoice#	Invoice Date	Invoice Amount	Payment	Balance	Credit
Dallas Property(4records)						
EMMA MADISON	Inv - 5	12/01/2015	\$868.57	\$1,000.00		(\$131.43)
GEORGE	Inv - 12	12/01/2015	\$372.14	\$120.00	\$252.14	
MARIA RODRIGUEZ	Inv - 1	12/01/2015	\$665.00	\$500.00	\$165.00	
ROBERT JOHNSON	Inv - 3	01/01/2016	\$290.00	\$300.00		(\$10.00)
			\$2,195.71	\$1,920.00	\$275.71	(\$141.43)

6.2 Chart

Please refer Appendix C for the Chart list.

Appendix C:

S.No	Chart Name	Description
1	Late payment trending	This chart shows the number of late payment count by month as a bar graph.
2	Occupancy trending	This chart shows the number of move in and number of move out by month as a bar graph.
3	Outstanding Payment	This chart shows the Outstanding Amount by month as a bar graph.



7. Configuration

After Installations of Resident Management package, the following configurations need to be made.

7.1 Permission Set Assignment

There is a permission set called RM Permission, which need to be assigned to users who need access to the Resident Management App. Admin user can grant permissions to users for access. There are two ways to assigning this permissions,

1) Go to Setup -> Administration Setup -> Manage Users-> Users -> click the Username link ->Permission Sets Assignment -> Click Edit Assignments Button -> Enable Permission Set (RM Permission).

(OR)

2) Go to Setup -> Administration Setup -> Manage Users-> Permission Sets ->Click the Permission Sets label -> Manage Assignment ->Add Assignments ->Select the User -> Click 'Assign ' button.

Assign Users Help for this Page

All Users

On this page you can create, view, and manage users.

In addition, download SalesforceA to view and edit user details, reset passwords, and perform other administrative tasks from your mobile devices: [iOS](#) | [Android](#)

View: All Users [Edit](#) | [Create New User](#)

To assign permission set for Individual User

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

<input type="checkbox"/>	Action	Full Name	Alias	Username	Last Login	Role	Active	Profile	Manager
<input checked="" type="checkbox"/>	Edit	B. Gandhimathi	gb	gandhimathi@review.adhi.com	14/12/2015 2:11 PM		<input checked="" type="checkbox"/>	Contract Manager	
<input checked="" type="checkbox"/>	Edit	Durai. Veeralakshmi	veera	veeralakshmi@review.adhi.com	28/1/2016 10:58 AM	Installation & Repair Services	<input checked="" type="checkbox"/>	System Administrator	
<input checked="" type="checkbox"/>	Edit	Krishnapandian, Dhanasingh	DKris	dhanasingh@review.adhi.com	29/6/2015 5:00 PM		<input checked="" type="checkbox"/>	System Administrator	
<input checked="" type="checkbox"/>	Edit	P. Anitha	ap	anitha@review.adhi.com	11/12/2015 4:21 PM		<input checked="" type="checkbox"/>	Standard User	
<input checked="" type="checkbox"/>	Edit	Reviewer_One	orevi	reviewer1@review.adhi.com	28/1/2016 5:07 PM	Installation & Repair Services	<input checked="" type="checkbox"/>	System Administrator	

7.2 Configure RM Settings

Admin user can configure the RM Settings, following are the steps:

Go to Setup -> App Setup -> Develop->Custom Settings -> Manage -> Click New button on top of The Default Organization Level Value -> Enter details & save.

Please refer Appendix D for the RM settings,

Appendix D:

S.No	Fields	Description
1	Automatically Close Invoice	Indicates whether an invoice can be automatically closed
2	Automatically Open Invoice	Indicates whether an invoice can be automatically opened
3	Billing Start Day	Default set as 1, this will be used as invoice start date
4	Include Amenities in Invoice	It indicates Amenities is included in invoice
5	Include Room Charge in Invoice	It indicates Room charge is included in invoice
6	Include Service in Invoice	It indicates Service is included in invoice
7	Payment due date	The day on which the payment is due
8	RM Page Size	It is used for mention the number of records in a list page
9	Sharable Room	It indicates whether Room is shared

RM One Reviewer

Home Leads Accounts Contacts RM Admin RM Resident RM Billing RM Report

Quick Find / Search...

Lightning Experience New!

Salesforce1 Quick Start

Force.com Home

System Overview

Personal Setup

- My Personal Information
- Email
- Import
- Desktop Integration

Custom Setting
RM Settings

If the custom setting is a list, click **New** to add a new set of data. For example, if your application had a setting for country codes, each country's name and dialing code.

If the custom setting is a hierarchy, you can add data for the user, profile, or organization level. For example, you may want different on whether a specific user is running the app, a specific profile, or just a general user.

▼ Default Organization Level Value

Location	review	Automatically Close Invoice	<input checked="" type="checkbox"/>
Automatically Open Invoice	<input checked="" type="checkbox"/>	Billing Day	
Billing Start Day	1	Include Amenities in Invoice	<input checked="" type="checkbox"/>
Include Room charge in Invoice	<input checked="" type="checkbox"/>	Include Service in Invoice	<input checked="" type="checkbox"/>
Payment Due Date	5	RMPage size	20
Sharable Room	<input checked="" type="checkbox"/>	Week Start Day	

7.3 Page Layout Assignment

For Enterprise Edition and above, the custom page layouts can be used. Following are the steps to assign custom page layouts.

- 1) Go to Setup → Administration Setup → Manage Users → Profile → Click the profile name → Page Layouts → standard Object Layouts → Account (View Assignment) → Edit Assignment → Choose Account Layout (Installed Package: Resident Management).
- 2) Assign Resident Management layout for lead, Account, Contact.

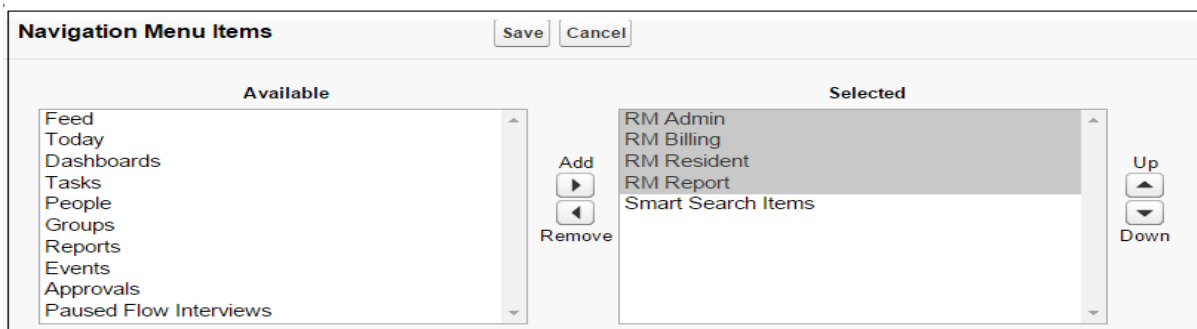
7.4 Mobile Setup

The user can access the Resident Management App on mobile devices.

The following Steps are required for mobile setup:

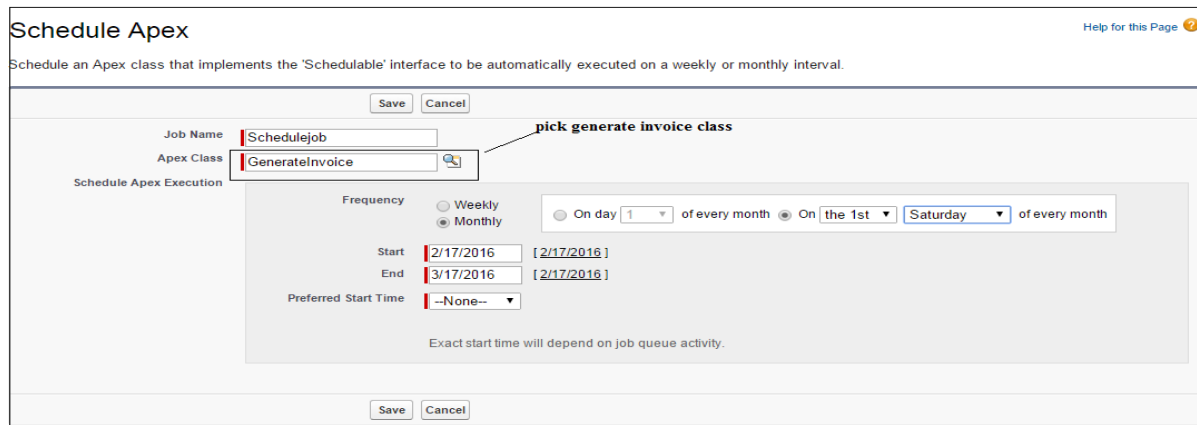
- 1) Download Salesforce1 Mobile app ,
- 2) Go to Setup → Administration Setup → Mobile Administration → Salesforce1 Navigation.
→ Select the menu item from Available list, (Like (RM Admin, RM Billing, RM Resident, and RM Report). → Click Add, it will be moved to selected list.

Now the user can View the Resident Management menus on mobile app.



7.5 Scheduler

Invoices can be setup to automatically close and open on a certain day of the month. To achieve this salesforces' scheduler can be used, please note this feature is only available in Enterprise Edition and above. To schedule the Job using **Schedule Apex** button in Apex class, Please pick generate invoice class, For other Editions, the batch job can be manually run using the ,**'Batch Close Invoice Button'** in RM Billing tab.



8. About Us

Adhi Software PVT Ltd is an IT consulting Company from Chennai, India. We would be happy to assist you with any demo, support or consulting needs. We can be contacted at

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