AMC AIM USER GUIDE
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Chapter 1

**Getting Started**

Items offered with AIM and MarketAPTS websites. (Resident Portal for Payments through AMCRentpay.com, work orders and messages from residents). Many other advantages for reporting and Online Availability!

**Introduction**

The website is [www.RentEGI.com](http://www.RentEGI.com) it will direct you to the login page. Enter in your user ID and password click LOG IN. Select the property you would like to enter, using the drop down menu and click CONTINUE.

AIM will automatically take you to the main page.

All users will have access to a test site which allows you to make mistakes and try new things in the system without messing up the information in your own program.

The Main Screen has information specific to the property you have chosen. Navigation back to this screen can be done by clicking the AIM logo at the top.

The main screen will also allow you to change properties, if you have access to more than one site (or) the test site. Click CHANGE PROPERTY on the top right hand side of the screen and it will take you back to the property selection.

**Passwords**

AIM tracks things done in the system; therefore all users are required to have their own individual password. Do not share your user ID or password with anyone, this should be kept confidential as your work will be recorded, just as other user work will be recorded as well.

Each user can be tied to more than one property with the same password. If you have access to more than one property you will see all properties listed on the dropdown menu after entering your login and password. You can then select the property you would like to view. You can change your password by clicking the Passwords link under your name at the top of AIM and enter in a new password where it says AIM Password > click SUBMIT

**Users**

All AIM users will need a login. Once an employee is setup in the Payroll system their name will appear on the Add/Edit Users screen under System Utilities. Click the Add new user button at the top of AIM. A search screen will come up. Only enter one of the fields and hit search. Once you find your employee click on their name and change the role you would like them to be. Enter a password or have the system generate one and you are done. They can login now with their payroll id/employee id with AMC and the password you entered for them.
Once an employee has been set up with a login and password, they can be listed in the drop down menu of employees for their property (example: work orders, traffic, etc.). In order for their name to appear in the drop down menus, the employee must login AIM at least one time, after their initial login their name will automatically appear in all employee dropdown menus.

To remove a name from the drop down menu, the manager can go to System Utilities > Add/Edit Users > select the employee you wish to remove and press Delete.

To delete them from a property click the delete user from a property button and select their name. That will remove them.

The Menu System
The menu is setup with the different areas of the system. You can click on any of these to open the options for the section you selected. Each Menu item has sub menu items. All of the sections that have a Reports section the same reports can be found under the Reports Menu. Once in a screen there can be a sub menu for that page. You can have multiple windows or tabs open of the AIM system.

Saving Your Work
Screens where you need to save your data will have an UPDATE or SUBMIT button at the bottom. They both save all the fields on the page. If you change any information on the screen and do not select the UPDATE or SUBMIT button, your work will not save.

If there is just a NEXT button there will probably be a NEW option at the top of that section. Use the NEW to enter new transactions or items to that section.

Tab Keys and Drop Down Fields
On most screens you can use the tab key to go to the next field. You also have the choice to use your mouse to move around from field to field. On most of the dropdown fields we have enabled where you can type in the box as well as use the arrow to show all the choices. This feature should save time.

Make A Trusted Site To Help With Pop-Up Blockers
At the top of Internet Explorer go to tools and internet options. Click the Security tab and then click Trusted Sites like on the screen below. To add our site, click the Sites button. Remove the check from the box labeled Require server verification (https) for all sites in this zone. Then click the add button.

Log Out
To log out of AIM, click the LOG OUT button on the top right hand side of the screen at any time.

Helpful Hints
- If a window makes a popping sound and does not come up try again holding down the shift key.
- ***AP Period controls report dates***
- *New* Means New
- Anytime you are posting a transaction for a resident and you want to go back to the Resident Update Screen, click on the Residents Name that is highlighted and underlined in blue

**Windows and IE Shortcuts**

**Windows System Key Combinations**
- ALT+TAB: Switch between open programs
- Windows Logo+L: Lock the computer (without using CTRL+ALT+DELETE)

**Windows Program Key Combinations**
- CTRL+C: Copy
- CTRL+X: Cut
- CTRL+V: Paste
- CTRL+Z: Undo
- CTRL+B: Bold
- CTRL+U: Underline
- CTRL+I: Italic

**IE Program Key Combinations**

<table>
<thead>
<tr>
<th>Key Combination</th>
<th>Action Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Alt + Left Arrow</td>
<td>Back a page.</td>
</tr>
<tr>
<td>Backspace</td>
<td>Back a page.</td>
</tr>
<tr>
<td>Alt + Right Arrow</td>
<td>Forward a page.</td>
</tr>
<tr>
<td>F5</td>
<td>Refresh current page, frame, or tab.</td>
</tr>
<tr>
<td>F11</td>
<td>Display the current website in full screen mode. Pressing F11 again will exit this mode.</td>
</tr>
<tr>
<td>Esc</td>
<td>Stop page or download from loading.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Key Combination</th>
<th>Action Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ctrl + (- or +)</td>
<td>Increase or decrease the font size, pressing '-' will decrease and '+' will increase.</td>
</tr>
<tr>
<td>Ctrl + Enter</td>
<td>Quickly complete an address. For example, type computerhope in the address bar and press CTRL + ENTER to get <a href="http://www.computerhope.com">http://www.computerhope.com</a>.</td>
</tr>
<tr>
<td>Ctrl + D</td>
<td>Add a Favorite for the page currently opened.</td>
</tr>
<tr>
<td>Ctrl + I</td>
<td>Display available bookmarks.</td>
</tr>
<tr>
<td>Ctrl + N</td>
<td>Open New browser window.</td>
</tr>
</tbody>
</table>
Chapter 2

Traffic

New Traffic / Guest

SELECT TRAFFIC > NEW TRAFFIC / GUEST: select whether your traffic is an On-Site traffic or an Off-Site traffic. (on-site is a walk in traffic, off-site is a phone call, voice mail, internet or email)

OFF-SITE TRAFFIC

Off-site traffic will allow you to enter less information. Complete the required fields and select add traffic. You can convert the off-site traffic to an on-site traffic at a later date by selecting Edit/Update Traffic/Guest Convert/Application.

ON-SITE TRAFFIC

Begin entering in all guest card information. The following are required fields and must be entered in order to save traffic:

a. first name
b. last name
c. phone number (xxxxxxxxxx format please)
d. units type
e. lease term
f. source code
g. date of contact
h. result

Although the other fields are not required, fill in as much information as possible for future follow up. Cell phone numbers, home phone numbers and email addresses will transfer over to the resident listing if they move in.

1. The contact type will automatically pull 1st visit as the type of contact; you can override this and enter in other types of contacts, including phone traffic and internet traffic.
2. Select Tour: Yes if you toured the prospect and No if you didn’t tour the prospect.
3. Result: use the dropdown menu to determine what the result code is for this traffic.

Result code represents the objections as to why the prospect didn’t lease, or if they did lease an apartment you would select Application Submitted.
4. **Leasing Agent:** This will default to whoever is logged into AIM. If you use the dropdown menu, it will give you a list of all employees at your property.

5. Once you have all information entered, you must click the ADD TRAFFIC button. If you do not select this, your traffic will not save and you will have to re-enter your traffic again.

---

**Edit / Update Traffic / Guest**

1. **SELECT TRAFFIC > EDIT / UPDATE TRAFFIC / GUEST:** find the prospect you are looking for by completing a search. The most recent traffic will always be at the top of your traffic list. You can also search for traffic several different ways:
   a. Scroll down the list of open traffic until you find the person you are looking for and click the SELECT button
   b. FILTER TRAFFIC SEARCH: Enter in the prospects first or last name and click SEARCH
   c. Click on the column list titles that are underlined, such as **DATE**, **NAME** or **PHONE NUMBER** and you will be able to sort traffic by any of those categories in order to find the prospect you are looking for.

2. Once you select the prospect you are looking for you can begin in change information such as name, address, phone number, unit type desired, lease term and occupants. If you change any of this information you must click the UPDATE button in order to save any of the changes made.

3. If you would like to change information such as contact type, date of visit, result, source code or leasing agent, you will need to find the SELECT button located under CONTACT DETAIL. Make sure to click the SAVE button after any changes have been made.

4. To add an additional contact detail for a prospect, select the NEW button located next to CONTACT DETAIL. Enter in contact type (2nd visit, etc., date, result, source code and agent name) Remember to click the SAVE button after new information has been entered.

5. **CLOSE TRAFFIC:** You are now able to close traffic in the Open Traffic List. Traffic > Edit/Update Traffic > select prospect and CLOSE the traffic. By closing traffic you will remove the prospect from the open traffic list in AIM.

---

**Add Traffic as Pending Resident**

1. **When entering in the result of the traffic there are two options that will prompt AIM to add the prospect as a pending resident:** APPLICATION SUBMITTED or APPLICATION APPROVED. Select one of these options as your result and continue entering traffic contact information

2. AIM will require you to enter in the demographics for the resident prior to selecting a unit and making them a pending resident. Complete the demographics and fill in all information requested as AIM will search for residents with the same social security number who have lived at other AMC communities and will prompt you if they were evicted or skipped from another community.

You will be required to get RPM approval prior to making the prospect a pending resident if they show up as a skip or eviction from another community.

If you decide to deny the prospect due to the rental history received in AIM, you can auto cancel the prospect. This will make a pending person in Common so make sure you finish and cancel them.

If you decide to make them a pending resident, before you can select the unit number you will be required to send a note to your RPM and select RPM approval. After you RPM has approved this lease, you can go back to traffic and make them a pending resident by following the instructions below.
3. Select the box that states Make Pending > AIM will ask you if you want to add this traffic as a pending resident, click YES and an availability list will pop up with a list of all vacant and on notice to vacate apartments that are not pre-leased.
   a. Waitlist - If you need to enter someone on a waitlist because you do not have an apartment available or the right unit type available, select COMMON unit. This will make the prospect a pending resident and you can create charges and accept payments for these waitlist residents. When have a unit available for this resident, follow the transfer resident procedures.

4. SELECT the prospect you wish to lease an apartment to.
5. SELECT the apartment you would like to tie this prospect to.

6. AIM will then show you the Move In Defaults (Move In Defaults will only appear if someone at the property has set them up prior to the lease. These fees include application fees, non-refundable fees, etc. For instructions on how to enter Move In Defaults, please see that section of the user guide.) Edit or Delete the amounts if needed and click SUBMIT.

7. The next screen will prompt you to add the pending resident to the Pay Lease program. Enter the residents first name, last name and email address and select Update and Next.

8. The next screen will pull up the MONTHLY BILLING for the resident. The pending resident will always be set up at market rent. AIM will also show you any Monthly Billing Defaults that you have set up prior to the lease. (These fees include any other income charges that you charge all or most residents. For instructions on how to enter Monthly Billing Defaults, please see that section of the user guide.) MOST IMPORTANT PART FOR LARA – RENT MUST BE CORRECT AND ACTIVE.

   Review the monthly billing and make any changes by adding, deleting or editing monthly billings until the monthly billing is correct. Then select the UPDATE & NEXT button so save your changes.
   a. To add additional monthly billing charges, click the NEW button. Select the TRANSACTION TYPE (Charge) > enter CODE > enter AMOUNT and click SAVE. Repeat this process until all charges have been entered and the auto bill looks correct. Then click NEXT. You do not need to enter in start or end dates; AIM will automatically enter in the start date as the 1st day of the month the resident is moving in. The end date will always be 12/31/2099.
   b. To EDIT a monthly billing charge, select the EDIT button on the same line as the charge you would like to change. AIM will highlight the charge you selected; you can edit the charge code, amount and dates if needed. After changes have been made, make sure to click the UPDATE box that is highlighted in gray, otherwise the changes you made will not save. (The start date of the monthly billing should be the first day of the month the resident is moving in. example: Move in date 11/15/10, start date of monthly billing 11/1/10.)
   c. To DELETE a monthly billing charge, select DELETE and AIM will automatically remove it from the billing list.

9. AIM will now go to a lease dates screen. Verify that the move in date and the lease ending date are both correct. If they are incorrect, update them, then select Update and Next.

10. AIM will automatically take you to the RESIDENT UPDATE SCREEN where you can safely exit.
*Note: Once the application fee has been entered the pending resident is set up in AIM and you can go back and update the information at any time prior to the move in. You will have to access the information in the RESIDENT > RESIDENT DATE UPDATE > pending resident search. It is always a good idea to complete as much information as possible as soon as a deposit is put down to hold an apartment. This way you can be sure the information is correct in AIM.

**Auto Cancel**

If a prospect comes back as a skip or eviction from another property and you to deny them, you can use the Auto Cancel button on the traffic card, instead of selecting Make Pending. This will allow you to add them as a pending and cancel them at the same time, without having to go through the steps of making them a pending resident.

When you select Auto Cancel, AIM automatically creates a pending resident on a common unit and takes you directly to the cancel resident page. Select the date of the cancellation and the reason (denied - credit or denied - other), then use the dropdown menu to state the resident was denied by selecting YES and then press submit.

**Traffic / Guest List**

1. You can generate a traffic list by a using a series of dates to assist with follow up.
   a. Click on the calendars to change the dates or you can change by changing them in the boxes provided.
   b. Select the type of traffic list you would like to generate. OPEN Traffic will include all prospects that have not been set up as a pending resident. CLOSED Traffic will include all pending residents. ALL Traffic will include all traffic for the time frame specified.
   c. Click GENERATE and a screen will pop up with the dates and traffic you specified. The list will include names, phone numbers, date needed, type of unit desired, source of traffic, etc. You will also be able to click right over to anyone’s guest card to get further information.
   d. If you want to search for a specific resident, type in the name in the field provided; otherwise leave it blank.

**Add Traffic Source**

This has been removed and all sources streamlined.

**Traffic Reports**

1. The traffic report is similar to the traffic list; however this is a printable report versus just a pop up screen on the computer. You will be able to select a range of dates that you would like the report to generate. This report will include all traffic as opposed to the traffic list where you can select specific requirements.
Chapter 3

Residents

Resident Data Update

There are several ways you can find a resident on the Resident Data Update screen.

1. Use the top left search box to enter in the CURRENT residents apartment number and click the search box or just enter and the resident will automatically pull up.
2. Use the top right search box to enter in the name or unit number of a Current, Pending or Former resident. Make sure to change the search option bullet point to the type of resident you are looking for. There is an option for current, pending, former or all. Then click the search button and a drop down list of residents will appear with specifics you entered.
3. Use the Scroll down the list of current residents until you find the person you are looking for and click the SELECT button
4. Click on the column list titles that are underlined, such as UNIT NUMBER, NAME or MOVE IN DATE and you will be able to sort traffic by any of those categories in order to find the prospect you are looking for.

Once you have located the resident you are looking for there are several things you can do while viewing the residents screen. The screen options will change slightly depending on if the resident is pending, current or former. (Most of the items listed below are things that you may have already completed when adding a pending resident to the system) Below is a key of all options that will be available under the Resident Data Update screen.

a. Resident Info - Edit address and phone number. This also allows you to make comments that will appear on the Aging Delinquency Report under comments 1.
b. Resident Status - You can change the status from normal to other options depending on the resident's history (section 8, armed forces, block payments, resident in court, employee, certified funds only or student)
c. Resident Notes - Add or review all notes/correspondence you have had with the resident
d. Lease Dates - Edit lease date terms
e. Fees - Edit late fee policy and refundable deposits
f. Monthly Billing - Add, Edit or Delete auto bill.
g. Parking - Add or Delete assigned parking
h. UB West Occupants - Add or Edit occupants information and alternate info for resident
i. Additional Info - Add New , Edit or Delete personal information for lease holders
j. Charges / Payments - One time payments or charges for resident
k. Future Charges - One time payments or charges for resident in a future month
l. Lease Renewal - Add, Edit or Delete lease renewal
m. Give Notice - Add , Delete, Edit or Cancel notice to move
n. Prorates - Option to view prorates by transaction code for move in
o. Renters Insurance - Add, Edit or Delete renters insurance
p. Move Out - Move out a current resident
q. On Line Rent Pay - set up a resident to make payments on www.amcrentpay.com
r. Move In - Move in a pending resident
s. Transfer Resident - Option to change apartments on a pending resident
u. **Resident Ledger** - View resident’s account ledger  
v. **Deposit Ledger** - View resident’s deposit ledger  
w. **Mail Merge Letters** - Add or view all letters you have sent to the resident  
x. **Service Requests** - Add a work order for resident  
y. **Adjust Rent** - Adjust resident rent in billed incorrectly  
z. **Deposit Refund** - Complete disposition for former resident

*Remember that any time you change/edit information you need to click the update and next box before moving on, otherwise the changes you made will not save in the system.*

**Monthly Billing**

RESIDENT DATA UPDATE > select resident > MONTHLY BILLING  

**ADD MONTHLY BILLING**

To add additional auto bill charges, click the NEW button. Select the TRANSACTION TYPE (Charge) > enter CODE > enter AMOUNT and click SAVE. Repeat this process until all charges have been entered and the monthly billing looks correct. Then click NEXT.

**EDIT MONTHLY BILLING**

To change a monthly billing, select the EDIT button on the same line as the transaction you wish to edit. The row will then highlight in gray and you can make changes directly to the dates, and amount of the transaction. After any changes have been made, make sure to click the UPDATE box that is highlighted in gray, otherwise the changes will not save.

**DELETE MONTHLY BILLING**

To delete a monthly billing, select the DELETE button on the same line as the transaction you wish to delete. The row will then highlight in gray and delete itself from the monthly billing drop down list.

**Housing Residents**

Section 8 residents need to have their monthly billing set up differently from other residents. This prevents the resident from getting late charges on the government portion of their rent.

1. Change the resident status to section 8 in the resident date update screen  
2. Add a monthly billing charge for HUD Rent for the amount of the rent the government is responsible for  
3. Edit the monthly billing for RENT to the portion the resident is responsible for. If they are not responsible for any rent, delete the RENT charge.  
4. When government payments are made on behalf of this resident, make sure to code the payment to GOVT instead of a regular PMT. AIM will be able to determine if the resident owes late charges based on the HUD rent charges and GOVT payments made.

HUD Bulk Rents is a page with all Status 8 residents where you can update their RENT and HUDR on one page.

**Charges / Payments**

RESIDENT DATA UPDATE > select resident > CHARGES / PAYMENTS > NEW This is for one time payments or charges for the resident
1. Enter in TRANSACTION TYPE
   a. P - Payment/Credit
   b. C - Charge
   c. I - Deposit Paid In
   d. O - Deposit Out
   e. R - Reverse

2. Enter in CODE (specific mnemonic code you wish to charge or apply payment to)
3. Enter in AMOUNT of the charge or payment
4. Click SUBMIT

O – Deposit Out → APLY – Apply Charges to Balance is the only way to move money between the two ledgers. So if you applied the check to the resident ledger use this one with a negative amount to move the amount needed to the deposit ledger.

Future Charges

RESIDENT DATA UPDATE > select resident > FUTURE CHARGES > NEW
Follow the steps that you would take to enter in a current transaction. The only additional step would be to enter in the date of the month you wish the future charge to appear. Make sure to have the date as the 1st day of the month you wish the transaction to post. (example: 11/1/11)

You can view future transaction or delete them from AIM before they take effect. If future transactions have been entered into the system, they will appear under future transactions until the month they take effect.

Add Pending Resident

If you forgot to assign a pending resident to an apartment, they will appear in this section waiting to be assigned an actual unit. If a pending resident does not get assigned a unit number, they will not count as a lease on your weekly reports until they are assigned a unit number.

If you have a waitlist at your property, this is the section where you can look at the pending residents on the waitlist and select an apartment for them to move into
1. Select the pending resident (or) waitlist applicant you wish to change the information on > SELECT the unit number you wish to have them assigned to. (An availability list of all vacant and un-leased, on-notice units will appear on your screen)
2. Follow the steps in Chapter Two: Add Pending Traffic as Resident

Make Cancelled Resident Pending

If you have a pending resident who cancelled prior to moving in and now has come back to the community to rent another apartment within the last month, they will appear in the drop down list of residents.

If the resident appears in the dropdown, you can automatically make them a pending resident again, without having to enter them in as traffic. AIM stores all information previously entered, so you will not have to start over and enter in the resident information from scratch. The demographics previously entered, monthly billing and ledger from the previous leased apartment will appear for this resident once you make them pending.
Select cancelled resident and press SUBMIT, AIM will automatically make them a pending resident on a common account. Immediately go to options and find Transfer Resident > AIM will bring up a list of available apartments, select the apartment they would like to move into. The resident is now pending on that unit number selected. After you have selected a unit number, makes sure to update the pending information with the correct move in date, lease ending date and monthly billing. You can now treat this pending move in like all other pending residents.

**Resident Listing**

The RESIDENT LISTING screen is equivalent to the RESIDENT DATA UPDATE screen. It has all of the same options and features. As AIM upgrades the RESIDENT LISTING screen will be for viewing the resident information only. When this happens, all changes will need to be completed in the RESIDENT DATA UPDATE.

**Move In Defaults**

RESIDENTS > MOVE IN DEFAULTS > NEW

AIM allows you to enter in mandatory move in charges (one time fees) for all residents, such as Application Fees, Non-Refundable Deposits/Lease Initiation Fees, Pet Fees, Pet Deposits, Refundable Deposits, etc.

By adding move in defaults, AIM will automatically charge these to all new move -ins without you having to enter them manually for each move in.

1. Transaction Type: Charge
2. Code: enter mnemonic code (NREF, APPL, etc.)
3. Amount: $default amount
4. SAVE

When you lease an apartment, the move in defaults will automatically appear and you will have the option to charge all of them or some of them. You will also have the ability to change the default amounts if needed. If you do not want to charge a particular charge to that resident, delete the default amount and it will remove it from the list of resident charges. (If you delete the charge from the resident, it will only remove it from the current residents screen and will appear on the next pending resident)

You can also edit or delete the move in defaults from the system as any time. Residents > Move IN Defaults > Select to edit amounts (or) Delete to remove the charge from the list permanently.

**Monthly Billing Defaults**

If your property charges additional other income charges to ALL Residents, you can set up default Monthly Billing Charges for all move-ins.

**Example:**

- If your property has a bulk cable contract and all resident pay cable every month.
- If your property has their own phone system and everyone pays phone and internet every month.
- If you charge real estate tax at your property
- If you charge parking to everyone at your community each month
(These are just a few examples)

Monthly Billing Default makes your job easier at move in, because all of these charges will automatically appear in their monthly billing at the time they lease the apartment, instead of having to enter each charge every time you lease an apartment.

RESIDENT > MONTHLY BILLING DEFAULTS > NEW

1. **Transaction Type**: Charge or Payment
2. **Code**: Enter in the Transaction Code from the drop down menu
3. **Amount**: Enter in the monthly billing amount
4. **Should this prorate**: Default is YES, leave unless for some reason the amount should not be prorated (example: Renters Insurance is not a pro-ratable item)
5. Click **SAVE**

You can also DELETE Autobill Defaults by selecting the selecting the Transaction Code and clicking DELETE.

**Add Move Out Codes**

This has been removed and all sources streamlined.

**Move In Pending Resident**

RESIDENTS > RESIDENT DATA UPDATE > select the pending resident you wish to move in > MOVE PENDING IN

Before you select the MOVE PENDING IN, make sure to go through the entire resident data update screen and verify that all the information is correct, including; lease dates, lease term, monthly billing, etc. (follow the steps below to ensure all the data is entered correctly into AIM)

1. **RESIDENT INFO**: The address will automatically update to the address of the new apartment they are assigned to; however you will want to update the information with the pending residents new phone number. After you update this information, click the UPDATE & NEXT button.
2. **LEASE DATES**: Review the lease dates to see if they are accurate. AIM automatically assigns a lease term according to what you entered in as traffic for lease term; however this is only a suggestion. You can change the lease term by either typing over the lease dates, clicking on the calendar button and choosing lease dates or by selecting the numerical number you want for the number of months in the lease. AIM provides a drop down of all applicable term terms; however it does not take lease exposure into consideration. (Make sure that the lease starting date is not before the move in date or system date; otherwise AIM will not charge the pro-rate at move in) Once you have updated the lease terms, click the UPDATE & NEXT button to save the changes you made.
3. **FEES**: The pending resident will automatically be set up with the property’s late fee policy already in place; however if the resident has a refundable deposit required, enter in this amount and click
UPDATE & NEXT to save changes. You can also list a concession chargeback if your property requires the resident to pay back the monthly discount on the rental rate, in addition to the late fee if they pay late.

4. MONTHLY BILLING: Verify that the monthly billing entered is correct, if not update the monthly billing by either adding NEW charges, EDITING current charges or DELTEING current charges.

5. PARKING: This is where you can assign a specific parking spot for your resident, if you have set up parking in AIM for your property. After all information has been entered, click the UPDATE & NEXT button to save changes.

6. UB WEST OCCUPANTS: Complete all necessary information about the pending resident. The only required field is the NUBMER OF OCCUPANTS.

7. ADDITIONAL INFO: Demographics should have already been entered for the resident; however verify that all occupants (including minors) demographics have been entered. Also verify that the demographics were fully completed including; vehicle and emergency contact information.

Select the NEW button to enter in profile/demographics information for each lease holder. Once information has been entered and saved, you can always go back and select the profile of each lease holder to update or change information. Required information for demographics includes:

- a. Rental Information
- b. Resident Information
- c. Personal Information
- d. Job Information
- e. Emergency Contact Information

(the only item that is not required is the vehicle information; however it is helpful to enter this information as well as AIM will keep a report of all vehicle information listed)

Click the SAVE button when all information has been entered.

8. CHARGES /PAYMENTS: Enter in any one time payments or charges, if needed. (application fee, non-refundable fees, etc.) If you have already entered in Move In Defaults, you may bypass this screen, as it is most likely the same information. You can enter any up-front concessions if needed. This is done by selecting the TRANSACTION TYPE > CODE > AMOUNT. (Similar to the auto bill set up, only this is a onetime transaction)

9. MOVE IN SCREEN: Enter in move in Approval Code: this can be manager name, credit score, Safe Rent score, etc.
   
   - a. Enter in type of Renters Insurance: Preferred Provider, Non- Preferred Provider or None

   - i. If going with the preferred Provider -enter in the effective day insurance should start. Rate does not prorate, the charge is the full amount per month regardless of the move in date. If a resident is moving in at the end of the month, you may want the effective insurance date to be the first day of the following month. AIM will automatically add the entire insurance fee to the monthly billing after you select this
option.
ii. If the resident is using a non-preferred provider for insurance, you will be required
to enter in the insurance information, including policy number, agent name and phone
number, etc.

b. Enter in Lease Approved By: your name or manager name
c. Enter in Move In Date
d. Click the UPDATE AND NEXT box and then review the prorates and click the UPDATE
AND NEXT button again.
e. Final step is to answer YES to the question: Are you sure you want to move in resident?
(You can cancel the move in if you notice some of the information is incorrect. If you do cancel,
edit the information and then follow steps 1-7 again)

*Make sure the Monthly Billing dates are not prior to the system date or the move in date, otherwise the
pro-rates will not calculate correctly at move in.

Transfer Resident (Pending Only)
If you have a pending resident who decides they would like a different apartment prior to move in, or you
need to move then to a different apartment due to the current resident not moving out, follow the steps
below.

RESIDENTS > RESIDENT DATA UPDATE > select the resident you wish to transfer > TRANSFER
RESIDENT > a drop down list of available apartments will appear on your screen, choose the apartment
you wish to transfer then to and SELECT the unit number. The pending resident’s information will all
transfer over to the new apartment. Remember to update the monthly billing if the rental rate is different
on the new apartment.

Transfer Current Resident
AIM does not have an option to transfer current residents; however there is a shortcut you can use in
AIM for internal transfers which will save you time in entering the residents information in AIM.

Go to Resident Data Update > select Resident > under Options, select Give Notice > enter in notice date
and move out date. When the system asks for move out reason select Transfer Within Community >
select Pick Unit > AIM will automatically pull up a list of available apartments and you can select the
unit they would like to transfer into. Update the information with the correct lease dates and monthly
billing. You can now treat this pending resident like any other move in.

AIM will put them in as a pending resident on the new unit; however the resident will still be a current
resident in their old apartment. Balances and deposits will not transfer over. You will need to complete
a SODA on the old apartment after move out and have the resident pay a new deposit for the new
apartment. AIM will not mix ledgers or transfer over monies paid as these are two separate residents with
unique tenant codes.

*Tip: If a resident is planning on transferring during the middle of the month, have the resident pay you two
separate checks for their rent (one for the prorate in each apartment). This way you will not have to
wait for a refund from their old apartment to apply to the new apartment and there will not be a
delinquency. Remember AIM will not transfer over balances from either ledger. You need to keep this
clean and treat it like any other move in.

The only thing this option does is saves you time by as AIM will not require you to enter in the resident as traffic again or have to enter in all of their demographics.

**Cancel Pending Resident**

If a pending resident cancels their lease or a pending resident is denied you will need to cancel them as a pending resident in AIM.

RESIDENTS > RESIDENT DATA UPDATE > select the pending resident you wish to cancel > CANCEL

1. Cancellation Description: Use the drop down menu to make the proper selection
2. Cancellation Date: Enter in today’s date
3. Resident Rejected: Enter yes or no
4. Click the UPDATE AND NEXT BUTTON to save changes

**Lease Offers**

RESIDENTS > RESIDENT DATA UPDATE > select the resident you wish to add a lease renewal for > LEASE RENEWAL > MAKE OFFER

Enter the Dates and New Rent Amount. This will show in the rate options for LRO if that is turned on. This is a way to know what you offered a resident if asking rents change. All have and expiration date.

**Lease Renewals**

RESIDENTS > RESIDENT DATA UPDATE > select the resident you wish to add a lease renewal for > LEASE RENEWAL > NEW

AIM WILL NOT ALLOW YOU TO JUST CHANGE LEASE DATES IN THE SYSTEM WHEN COMPLETEING A LEASE RENEWAL. YOU NEED TO FOLLOW THE STEPS BELOW TO COMPLETE A RENEWAL IN THE SYSTEM.

1. Future Lease Begin Date: This will automatically populate with the next day after the current lease end date. If the resident has been a month to month resident for a while, you will want to change this date to the first day that the new lease was signed. (Whatever date is entered here, will be the start date of the new lease charges.)
2. Future Lease End Date: This will automatically populate with the shortest lease term you allow at the property. To change this date, either click on the calendar and scroll until you find the month and date you would like the lease term to end. Click on that date and the Future Lease End Date with update with the new date specified. You can also directly change the date on the future lease end date itself.
3. Leasing Agent: enter the name of the leasing agent who renewed the resident lease.
4. If you need to ADD/EDIT Insurance information for this resident, click the button to update before saving all changes.
5. Click the SAVE button to save changes made

The monthly billing will pull up on the next screen with both Active and Future Transactions. The Future Rent charge will be the same as the Current Rent charges, so you will need to edit this if you are
increasing rent at time of renewal. To update this monthly billing select the EDIT button on the Rent Transaction. The row will then highlight in gray and you can make changes directly to the dates, and amount of the rent. After any changes have been made, make sure to click the UPDATE box that is highlighted in gray, otherwise the changes will not save.

If there are additional transaction charges that need to be entered at time of renewal, select the NEW button and enter in charges as you would any monthly billing item. If you need to cancel an upcoming lease renewal that has already been entered into AIM, select LEASE RENEWAL > the renewal information will be listed and you can click the DELETE button to cancel the renewal.

If you need to edit an upcoming lease renewal that has already been entered into AIM, select LEASE RENEWAL > the renewal information will be listed and you can click the SELECT button. You now have the option to change lease dates and leasing agent name. Remember to select the UPDATE button to save changes made.

MID MONTH RENEWALS - Anytime you post a renewal and the start date is not the 1st of the month, AIM will automatically re-calculate the monthly billing and charge the pro-rate of the new rental increase immediately. (example: If the resident renewed their lease on 5/15/11 and received a $25.00 increase, AIM will charge and additional $14.00 in rent for the 16 days left in the month.)

If your property does mid-month renewals; however you do not want the rental increase to take effect until the beginning of the next month, go ahead and leave the rental rate the same for the new rent charge on the renewal and then click NEW to add a new transaction for rent. Enter the start date for the new rent transaction to be the 1st of the following month and enter the new rental rate. Make sure that the current rent charge has an ending date of the last day of the month prior to the new rental rate starting. (example: new rent starts 6/1/11 - current rent should stop 5/31/11)

If you are doing a mid-month renewal it is important that you do not delete or edit a rent charge and leave a time frame where the resident is charged no rent. (example: resident renewed 5/15/11, rent charged was changed to start 6/1/11, so no rent is being charged from the 15th of the month to the 31st of the month) If this happens, when you forward the date, AIM will credit back rent from 15th - 31st of the month because the monthly billing is set to charge zero rent for those two weeks.

BACK DATING RENEWALS - AIM will allow you to back date a renewal as long as you are in the same accounting period; however if you back date a renewal to the 1st of the month and the resident received a rental increase; AIM will not recognize that it didn’t do the monthly billing correctly. AIM assumes that because the renewal was dated the 1st of the month, the system auto billed the correct amount. If you need to make an adjustment because the monthly billing did not bill correctly, you need to go to rent adjust to fix the error. (See Rent Adjust instructions)

MONTH TO MONTH RESIDENTS - AIM automatically recognizes when a lease term is expiring and will move all leases expiring to Market Rent and charge a Month-To-Month Fee.

If you would like this feature turned off, please talk with your RPM as they have access to remove the
market rent and MTM Fee feature from the system.

Adjust Resident Rent
RESIDENT > ADJUST RESIDENT RENT > select the resident you wish to adjust rent

In order to use the rent adjust screen, the resident must have had one of the following items happen in their account in the current accounting period. (Renewal, Move-In, Move-Out, Double Billed Rent or No Rent Billed, MTOM Bump and HUD)

Select Reason for adjustment > enter the amount to post > enter in comments as to why you are making this adjustment. These comments will appear on their account ledger.

Make sure before you post an adjustment that you have updated or corrected the resident’s monthly billing. If you have updated this, AIM will show you in the total due field what rent charge should have been billed.

Note: Rent adjustments are a charge, so if the resident owes more rent than what was originally charged, enter a positive amount to increase the balance/rent charge. If the resident was overcharged rent and does not owe the outstanding balance, enter in a negative amount to reduce the balance/rent charge.

RENEWAL RENT ADJUST:
   a. You would do a renewal rent adjust if you forgot to enter in a renewal and backdated it to the first of the month and the resident was charged market rent. (Amount to post would be a negative amount because the resident was over charged.)

   b. You would do a renewal rent adjust if you forgot to enter in a renewal and backdated the renewal to the first of the month and the resident was not charged the renewal increase, their fore they owe additional rent. (Amount to post would be a positive amount because the resident was under charged)

   *Note: Remember if you don’t catch the renewal mistake until the following month, the renewal rent adjust will not work. You will need to contact your RPM so they can make a payment to LTOL.

MOVE IN RENT ADJUST:
   a. You would do a move in rent adjust if you forgot to change the monthly billing and the resident was charged market rent instead of actual rent at move in. (Amount to post would be a negative amount because the resident was over charged.) Make sure if the move in was a mid-month, move in that you look up the difference, of the prorate that should have been charged. Use the move in / move out calculator if needed.

   b. You would do a move in rent adjust if you moved the resident in on the wrong date and they were over charged rent or under charged rent depending on the actual move in date.

MOVE OUT RENT ADJUST:
   a. You would do a move out rent adjustment if you moved someone out on the wrong day.
and they were overcharged or undercharged rent.

*Note: This does not include move outs that should have move out on the 31st and were moved out on the 1st. Remember rent adjust only works for items during the current accounting month. If the resident was monthly out prior to monthly billing, they would not have been charged rent. If the resident was moved out after monthly billing, do a positive payment to Vacancy Loss.

DOUBLE BILLED RENT ADJUST:
   a. You would do a double billed rent adjust if a resident was charged rent twice in the same month. (Amount to post would be a negative amount because the resident was overcharged.)

NO RENT BILLED RENT ADJUST:
   a. You would do a no rent billed rent adjust if a resident was not charged rent during the current month. (Amount to post would be a positive amount because the resident was undercharged.)

MONTH TO MONTH RENT ADJUST:
   a. New MTOM Rent Charge added under reasons for adjustment.
      i. If a resident was charged Market Rent and a MTOM fee, you can now do an adjustment to fix the rent charge, if they should not have been charge market Rent.
      ii. MTOM will only be valid if the MTOM fee is set up in the resident's monthly billing. (even if the MTOM fee is set at zero)
      iii. *Remember to avoid having to make this correction, change MTOM residents RENT in their monthly billing after month end and before your complete monthly billing for the following month.

HUD RENT ADJUST:
   a. If the amount the resident was charged for HUDR was wrong then you can adjust it here. (Amount to post would be a positive amount because the resident was undercharged.)

Give Notice
   RESIDENT > RESIDENT DATA UPDATE> select the resident you wish to update with a notice to vacate > GIVE NOTICE
   1. Notice Given: Enter in the date of the notice
   2. Notice For: Enter in the date of upcoming move out
   3. Move Out Code: use the drop down screen to find the correct source/reason for notice to move
   4. Move Out Description: This will automatically populate; however you can enter in a more specific reason than the move out code if you would like.
   5. Click the UPDATE AND NEXT button to save changes

Cancel Notice to Vacate
   To reverse a notice to vacate, go to RESIDENT > RESIDENT DATA UPDATE > SELECT RESIDENT >
SELECT GIVE NOTICE > SELECT CANCEL NOTICE

This will automatically remove the notice to vacate in AIM

Move Out
RESIDENT > RESIDENT DATA UPDATE > select the resident you wish to update with a notice to vacate
> MOVE OUT

Make sure that the notice to vacate date is not after the move out date. If it date is different, change the notice to vacate date before moving on, otherwise AIM will not register the move out correctly

1. Move Out Code: use the drop down screen to find the correct source/reason for notice to move
2. Move Out Description: This will automatically populate; however you can enter in a more specific reason than the move out code if you would like.
3. Click the UPDATE AND NEXT button to save changes

Online Rent Payments
See Paylease Signup under Help Documentation. All is through AIM and AMCRentPay.com.

Reverse a Move Out
RESIDENT > REVERSE A MOVE OUT > select the resident you wish to reverse the move out for. Only the residents that have been moved out on the same day will appear here. After you select the resident, AIM will show you a list of transaction that will be posted to the account (this is typically the move out prorate being charged back to the resident). Select SUBMIT and the resident will be current again.

Renters Insurance
RESIDENT > RESIDENT DATA UPDATE > RENTERS INSURANCE

To add renters insurance, click the NEW button and choose from the following options:

1. Preferred Provider: When selecting preferred provider AIM will automatically charge the monthly premium depending on the preferred provider being used. Click UPDATE AND NEXT to continue and save changes.
   Remember you do not need to add this to their monthly billing.
2. Non-Preferred Provider: When selecting non-preferred provider you will need to enter in the following information on the policy:
   a. Insurance Carrier
   b. Policy Number
   c. Effective Date
   d. Expiration Date
   e. Insurance Agent Name
   f. Insurance Agent Phone Number
   g. Liability Amounts
3. None: This is an option at some of the properties.
If the resident chooses to get a different policy within the 60 days, you will need to edit the renters insurance, add them to the Non-Preferred Provider and enter in the required information.

Any time there is a change to a Renters Insurance policy; remember to DELETE the old policy so the resident does not get charged for both options.

Reports
The following reports are located in the RESIDENT REPORTS section:

1. **Aging Delinquency**: Breaks down delinquency by resident for current month, prior 1 and prior accounting periods. The aging delinquency report also gives a total of the balance due.

2. **Aging Delinquency Comprehensive**: Breaks down delinquency by resident for total rent due, other due, late fees accrued, on-notice credits; providing a sub total and total amount due.

3. **All Resident List**: Provides a list of all current residents with phone numbers, move in and move out dates and lease expiration dates.

4. **Lease Expiring by Period**: Breaks down resident lease expirations by month; in addition it gives a detail report by month of total expirations 24 months out.

5. **Move In Report**: List of move ins, generated by specific dates entered.

6. **Move Out report by Date Range**: List of move outs, generated by specific dates entered.

7. **Prepaid Rent Report**: List of all prepaid rents with balances coming into the month and ending prepaid balances.

8. **Profile Demographics**: Gives a summary of all resident’s demographics

9. **Resident Accounting Ledger**: View resident ledger

10. **Resident Listing CSV File**: List of resident reports in a csv format for ReRemind (Bascom properties)

11. **Resident Mail Merge**: 

12. **Residents On Notice**: Gives a list of all residents on notice to vacate

13. **Security Deposit owing**: Provides a list of required deposits versus deposits paid in.

14. **Summary of Resident Balances**: List of all resident charges, payments and balances for the current accounting period. Report shows both prepaid and delinquent accounts, in addition to accounts at a zero balance.

15. **Vehicle Look Up**: Provides an area to enter vehicle information and find out who the vehicle belongs to on the property.

Parking
ADD / EDIT PARKING: Residents > Add/Edit Parking > New Parking Spot

a. Parking Spot: enter parking number

b. Amount: enter monthly rental amount

c. Parking Type: enter either (STALL, GARAGE, RV, SPECIAL or STORAGE)

d. Description: enter details or parking number again

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e. SAVE

*Continue this process until all parking/garages or storage units are entered into the system. (Once they are added, they will be saved in the system indefinitely, unless you delete it)

ADD PARKING TO EXISTING RESIDENT: Resident Data Update > Parking > Add Parking to Resident > Select available parking
  a. AIM will automatically add the monthly parking amount to the monthly billing. (*If the resident was already paying for parking, you will need to delete the old parking in monthly billing or the resident will be billed twice.) The old parking will not have the unit number listed next to the monthly billing.

DELETE PARKING FROM EXISTING RESIDENT: Resident Data Update > Parking > Delete

ADD PARKING PENDING RESIDENT:
  a. When leasing an apartment, under occupants you will see Parking Permits, select NEW > Add Parking to Resident > Select available parking
  b. Make sure not to add parking to the monthly billing manually, as AIM will automatically add parking to the monthly billing when you assign a parking number to the resident.
  c. *If you have parking set up as a Monthly Billing Default, you may want to remove this, so the residents will not be billed for parking twice.

RPM OVERRIDE
If a prospect is denied due to an eviction or skip from another AMC property the RPM will be required to override the decision before the site team can add them as a pending resident.

RPM override can also be used to override lease ending dates, where the property is already at their exposure limit.

If a property is using Safe Rent and Safe Rent denies the prospect, an RPM override is required, if the RPM decides to overrule the Screening decision. The site team will not be able to add the prospect as a pending resident unless the RPM overrides the decision.

An email will come to the RPM anytime a property needs an RPM override. The property must select RPM override when entering in the lease for denial reasons. They also have the ability to give the RPM notes as to why they want the override. If the property wants an override due to a lease expiration date, there is an override button on the lease date screen, they can also add notes for the RPM here on when they want the lease to expire.

When the RPM wants to override a decision, go to RESIDENTS > RPM OVERRIDE > and the residents/prospects that need approval will show up on the screen with the notes from the property.
Select the resident in question and add the reason for the override. This will allow the property to lease an apartment and move in the resident in question.

If the RPM needs to override the lease ending date, they will need to go to the lease date screen and change the lease ending date, then select UPDATE.

**Chapter 4**

**Charges / Payments**

**Post Transactions (Payment)**

CHARGES / PAYMENTS > POST TRANSACTION > select the resident you wish to post a transaction to > AIM will automatically default TYPE to a P - Payment/Credit > select the CODE (or) type of payment you would like to post. AIM will automatically default to a PMT - Payment by Check. Use can use the drop down screen to change the type of payment being posted > Enter in the AMOUNT of the payment. AIM will automatically default to the total amount due in the account ledger. If this amount is different, change the amount > Enter in a DOCUMENT NUMBER > if you have more than one payment to enter for this resident, select STAY ON THIS RESIDENT and AIM will re-direct you to the same screen to enter in an additional payment > click SUBMIT when you have entered in all of the above information.

If the payment does not equal the total balance due AIM will ask you how you would like to disburse the payment. If you click the AUTO DISBURSE button, AIM will pay all other income charges first and rent last. You have the option to tell AIM how to disburse the payment if you do not want to auto disburse. After you disburse the payment click DISBURSE PAYMENT.

You have the option to enter in notes as to why the balance is not paid in full under REASON. If you enter in comments they will post on the delinquency report.

AIM requires a DOCUMENT NUMBER on all types of payments, even if the payment is a Concession or Write-Off. Enter in the detail of why you are offering the concession or why you are submitting a write off in Document Number instead. This specific information will show up on the residents account ledger.

**Post Transaction (Charge)**

CHARGES / PAYMENTS > POST TRANSACTION > select the resident you wish to post a charge to > change the TYPE to C - Charge > select the CODE (or) type of charge you would like to post > enter in the AMOUNT of the charge > click SUMBIT

**Reverse a Transaction (Payment or Charge)**

CHARGES / PAYMENTS > POST TRANSACTION > select the resident you wish to reverse a transaction for > change the TYPE to R - REVERSE > AIM will pull up a list of all Charges and Payments/Credits posted to the account ledger in the current accounting month > find the Charge or Payment/Credit you would like to reverse and select/check the box on the left hand side of the transaction (if you need to reverse more than one transaction, you can select/check multiple transactions) > enter in the reason for the REVERSAL > click PROCESS.

If the charge or payment that you would like to reverse is in a previous accounting period, the Reverse option will not work. You will need to post a NEGATIVE Charge or Payment/Credit.
CHARGES / PAYMENTS > POST TRANSACTION > select the resident you wish to reverse a transaction for > select the TYPE you would like to Reverse (P - Payment /Credit or C - Charge) > select the CODE > enter in the AMOUNT you wish to reverse by placing a NEGATIVE in front of the amount > click SUBMIT

Post Multiple Payments
AIM allows you to post more than one payment to the same resident at one time. The only stipulation is that the payments have to be both the same TYPE and CODE. You can’t enter a payment by check and a payment by money order. Both payments would have to be either payment by check or payment by money order, etc.

Follow the steps in Posting a Transaction; however after you enter in the Document Number, instead of selecting Submit, go to Second Transaction For This Resident > enter in the TRANS 2 AMOUNT > and the TRANS 2 DOCUMENT NUMBER > click SUBMIT and both payments will post to the residents account ledger.

Posting Credit Card Payments
AIM allows you to post credit card payments without having to open a separate batch. When entering the payment you need to change the CODE of the payment to the correct credit card option:

- PPCC - payment credit cards
- PMCC - payment credit card

If paying a deposit, you also need to change the TYPE of payment to (I) for Deposit Paid In:

- CCDP - credit card deposit
- CCOD - other deposit paid by credit card
- PETC - pet deposit paid by credit card

By entering in the correct code AIM automatically moves the payment to a credit card batch (Batch number 00) and stores all payments made during the month in the 00 Credit Card Batch. AIM will not allow you to close the credit card batch. It always stays open so all credit card payments entered throughout the month will post here. At month end - you will email a copy of the 00 Batch to your accountant, so they will be able to balance the bank statement. (Procedures for this are found in the month end chapter of the user guide)

When posting a batch with a credit card payment, do not enter in the credit card payment into your total you are taking to the bank. Remember the credit card payment was made in a different batch and this money is not going to the bank. If you add up your checks and add in your credit card payment, the batch total will be off and you will not be able to post the batch.

Posting BULK Payments
CHARGES AND PAYMENTS > BULK PAYMENTS

1. Select the Type of payments you will be entering (checks or money orders) all payments have to be the same type of payment, they can’t be a combination of money orders and checks.
2. Select the number of payments you will be entering into the bulk payments batch and a drop down list/table will appear for you to enter in the following information:
   a. Unit Number
   b. Document Number
   c. Amount

3. Next validate the payments to verify residents with 2 or more NSF checks. You may want to delete some of the payments on the bulk payments batch if these items appear. You can delete these by selecting DELETE and removing specific payments from the batch, if needed.
   a. Partial payments will get paid to other income first and rent last.
   b. Managers can edit the balance due and move the open balance to the correct code by viewing the resident’s ledger. There will be an open balance column on the right hand side of the ledger which you will be able to edit. Find the rent code and move the balance due to rent and zero out the other income column.

4. If all payments are correct, SUBMIT the BULK payments. AIM will immediately ask you to close the batch.

Print Receipt
This has been removed from the system for AMC.

Multiple Charges / Payments
Applying multiple charges is used for one time fees or payments to multiple residents. It is designed to apply the same charge to several residents at one time. This should not be used for monthly billing charges. When selecting Multiple Charges / Payments a drop down list of all current residents will appear on the screen.

CHARGES / PAYMENTS > MULTIPLE CHARGES / PAYMENTS
   1. TYPE: enter in P - Payment/Credit or C - Charge
   2. CODE: select appropriate mnemonic code
   3. DESCRIPTION: write in a description for the payment/credit or charge you are applying
   4. AMOUNT: select the amount you would like to apply
   5. Select the residents you would like to apply the payment/credit or charges to. You have the option to charge All Residents by selecting the BOX located next to RESIDENT ID or you have the option of selecting Specific Residents by clicking the boxes next to each Resident Name.
   6. Click CHARGE

If you need to verify check numbers on multiple payments, use the Combined Bank Deposit Totals report. It will show both check numbers entered on the payment. You will need to know the correct batch number in order to find the correct combined payment details.
Multiple Service Charges
Applying multiple service charges is used for one time fees to multiple residents. It is designed to apply the same charge to several residents at one time. When selecting Multiple Service Charges a drop down list of current residents with Balances Greater Than $100 will appear on the screen. *This would be used for applying Service of Notice Fees prior to sending out the Pay or Vacate notices.

CHARGES / PAYMENTS > MULTIPLE SERVICE CHARGES
1. TYPE: enter in P - Payment/Credit or C - Charge
2. CODE: select appropriate mnemonic code
3. DESCRIPTION: write in a description for the payment/credit or charge you are applying
4. AMOUNT: select the amount you would like to apply
5. Select the residents you would like to apply the payment/credit or charges to. You have the option to charge All Residents by selecting the BOX located next to RESIDENT ID or you have the option of selecting Specific Residents by clicking the boxes next to each Resident Name.
6. Click CHARGE

Apply Late Charges
AIM will automatically bulk post late fee when you forward the date. Any resident that get not get charged for one reason or another (housing residents, delinquency increased due to charged posted that day) will show up under apply late charges.

CHARGES / PAYMENTS > APPLY LATE CHARGES > a list of all residents who owe late fees due to their balances being greater than $100 will appear on your screen that have not been previously charged when the system date was forwarded.. You have the option to charge All Residents who owe a balance by selecting the BOX located next to RESIDENT ID or you have the option of selecting Specific Residents by clicking the boxes next to each Resident Name > click CHARGE LATE FEES.

If your property does a per day late fee, it is imperative that you charge the late fees every day. AIM does not accrue daily late fees. If you forget to charge them and forward the date, you will miss out on Late Fee income. AIM will only charge late fees for the current day.

Bouncing NSF Checks
CHARGES / PAYMENTS > NSF > select the resident you would like to bounce a check for. All payments made by this resident will pull up. Select the check you wish to bounce by checking the box on the left side of the payment. AIM will automatically charge the NSF fee, add your late fee and then click PROCESS.
AIM will alert you if there are 2 or more NSF’s checks for the same resident by asking you if you would like to continue when entering in a payment (PMT).

Re-Pay NSF
To re-pay an NSF check, make a payment in AIM as normal. There are no different procedures when paying back a check that bounced.
Transaction Charge Codes
CHARGES / PAYMENTS > TRANSACTION CHARGE CODES
You can SELECT, DELETE or ADD NEW Charge Codes. Only RPMs and VPs can make changes to GL Accounts. Incorrect changes to Charge Codes will cause major problems at month end if they are not done correctly.

To view a current Charge Code, click SELECT > all information associated with this Charge Code will pull up. You can also make changes to existing Charge Codes here as well. All changes to existing accounts must go through your RPM.

Only a RPM can delete a current Charge Code.

To ADD a Charge Code click NEW CHARGE CODE

5. **CHARGE CODE:** enter in four to six digit GL code
6. **DESCRIPTION:** enter in the name of the GL Code
7. **GROUPING:** enter in the grouping from the drop down menu (ASST, EXPE, INCO, LIAB)
8. Click **SUBMIT** to save changes

Transaction Mnemonics
CHARGES / PAYMENTS > TRANSACTION MNEMONICS

You can SELECT, DELETE or ADD NEW Mnemonic Codes. Only RPMs and VPs can make changes to GL Accounts. Incorrect changes to Mnemonic Codes will cause major problems at month end if they are not done correctly.

To view a current Mnemonic Code, click SELECT > all information associated with this Mnemonic Code will pull up. You can also make changes to existing Mnemonic Codes here as well. All changes to existing accounts must go through your RPM.

Only a RPM can delete a current Mnemonic Code.

To ADD a Mnemonic Code click **NEW**

If you are adding a new mnemonic code, you must first enter the GL Code in order to be able to add it as
1. MNEMONIC: enter in a four letter abbreviation for the code
2. DESCRIPTION: enter in / spell out the mnemonic description
3. ACCT TYPE: enter in either a C
4. GL DEBIT ACCT: use the drop down screen to determine the correct account code to debit. Verify this code is correct with your RPM. If this code is entered incorrectly it will create problems at month end.
5. GL CREDIT ACCT: use the drop down screen to determine the correct account code to credit. Verify this code is correct with your RPM. If this code is entered incorrectly it will create problems at month end.
6. AMOUNT: leave blank unless there is a default amount associated with this GL Account
7. TAX RATE: leave this field blank unless you have sales tax in your state and the Mnemonic Account is a code you would apply sales tax to.
8. IS CASH: enter YES or NO depending on if the transaction is associated with a money payment. Most payments are YES, except Concessions and Write-Offs, because they are not payments associated with a bank deposit. Charges are NO)
9. Click INSERT to save changes

Employee Units (RPMs only)
RESIDENTS > RESIDENT DATA UPDATE > select the employee you need to add the employee unit code for > MONTHLY BILLING > NEW

TYPE: P - payment
CODE: EMPL - employee unit rent allowance
AMOUNT: enter in the amount of the discount
START DATE: first day of the next month END DATE: 12/31/2099
SAVE

Each month when rent auto bills, the employee payment will also be credited for the amount entered.

If you have not set up an employee unit and rent has already auto billed for the current month and the employee has a balance due which should be coded to employee units. Go to CHARGES AND PAYMENTS > POST TRANSACTION > select the unit number and enter in the same payment type, code and amount above for the current month.
Monthly Billings (Auto Bill)
The system will only allow you to apply the Monthly Billing on the 1st of every month; in addition the system will not allow you to apply monthly billing for than once in each accounting month. AIM will not allow you to forward the date to the 2nd of the month unless you have completed monthly billing.

See Chapter 14 on Monthly Billing Instructions or Autobill Procedures under Help Documentation.

Move In / Out Prorates
CHARGES / PAYMENTS > MOVE IN / OUT PRORATES
1. MOVE IN or OUT: select either IN or OUT from the drop down screen
2. AMOUNT: enter in total amount of monthly billing
3. PRORATE AS OF: enter in date of move-in or move-out
4. Click CALCULATE
Prorated amount will appear on the screen

Post Bank Deposit
CHARGES / PAYMENTS > close bank deposit
AIM automatically knows what batch is currently open, just find CALCULATOR TAPE TOTAL and enter in the total batch amount > click close batch

If the calculator total matches the batch total, the batch will be closed and AIM will forward to the next batch number. You will see that the batch is closed by the information listed on the screen if the calculator total does not match the batch total, the batch will not close and AIM will show you to difference between the batch and calculator tape totals. Click PRINT BATCH and review your calculator tape total with the printed batch to find the error (or) errors. Once you have found your errors and you are re-totaled your calculator tape and it now matches the batch total. Re-enter in the Calculator Tape total. If correct, the batch will automatically close and forward to the next batch.

Reports
The following reports are located in the CHARGES / PAYMENTS section:
1. Bank Deposit Combined Detail: Breakdown multiple payments and provides the check numbers for both payments entered in a combined payment
2. Bank Deposit Detail: Breaks down each individual payment or charge posted in a deposit batch; plus gives the running total for the deposit batch.
3. Bank Deposit Summary: Totals all bank deposit batches for the current accounting month.
4. Market Rent Vacancy Difference: Breaks down how charges were applied by unit to the following: market rent, LTOL and GTOL. Shows if there is a difference between what was charged and what is market rent.
6. Pending Future Transactions: Gives a list of all upcoming pending transactions
7. Security Deposit Detail: Unit list of all refundable deposits; compares refundable deposits to deposits required.
8. Transaction Detail Monthly: Breakdown the Transaction Summary report by every individual transaction that has taken place during the current accounting period. All transactions include all payments and charges by mnemonic code and unit number.

Find Check
CHARGES ANSD PAYMENTS > FIND CHECK > enter in document number or check amount > SEARCH
AIM Allows you to search for a check by check number or dollar amount. When you complete the search all checks with the matching numbers or dollar amounts will pull up in the system.

Understanding Payments and Charges
PAYMENT = decreases or reduces a balance due on the account ledger
CHARGE = increases the balance due on the account ledger
NEGATIVE PAYMENT = increases the balance due on the account ledger
NEGATIVE CHARGE = decreases or reduces the balance due on the account ledger
REVERSAL PAYMENT = increases the balance due on the account ledger
REVERSAL CHARGE = decreases or reduces the balance due on the account ledger

Common Mistakes / Tips to Fix:
Never do a payment or charge to rent EVER!

If you move a resident in on the wrong date: correct the mistake by doing a Payment to Vacancy Loss (or) do a Move In Rent Adjust if the mistake was caught during the same accounting period.

1. Positive Payment to Vacancy Loss - if the move in date in AIM was posted before the actual move in date on the lease and the resident has a balance due, which they do not owe.
2. Negative Payment to Vacancy Loss - if the move in date in AIM was posted after the actual move in date on the lease and the resident has a credit balance, which should be considered rent and not a credit.

If you move a resident in with the wrong rental rate: correct the mistake by doing a Move In Rent Adjust if the error was caught in the same accounting period (or) have your RPM make a Payment to LTOL.

1. Positive Payment to LTOL - if the rental rate charged at move in was higher than the rent listed on the lease and the resident has a balance due, which they do not owe.
2. Negative Payment to LTOL - if the resident was under charged on their rental rate in AIM, their lease states a higher rental amount and the resident has a credit balance, which should be considered rent and not a credit.
If you renew a resident with the wrong rental rate: correct the mistake by doing a Renewal Rent Adjust if the error was caught in the same accounting period (or) have your RPM make a Payment to LTOL.

1. Positive Payment to LTOL - if market rent was charged and they have a balance due, which they do not owe because they were over charged due to the renewal not being entered before monthly billing took place.
2. Negative Payment to LTOL - if the new renewal rate was not entered and they have a credit balance on their account, which should be considered rent and not a credit. The credit on their account is because they were charged the old renewal rate which was lower than the new leased rent.

Open balances on the resident ledger drive what will be reversed from a disposition so make sure these are correct before starting. They also drive where you can pay a payment to and for how much. If you received partial payment error check these.

Chapter 5

Work Orders

New Work Order

Work Orders > NEW Work Order

1. Unit ID: choose apartment number you wish to enter in a work order for
2. Date Submitted: AIM will automatically default to system date, you can override this if needed
3. Reported By: AIM will automatically default to the resident name
4. Contact Phone: AIM will automatically default to the phone number listed in the display resident screen
5. Permission to Enter: Enter in resident name or YES if permission was granted
6. Permission to Enter Date: Enter in the date permission to enter was given
7. Work Order Category: Select correct work order category from drop down menu
8. Describe the Problem: Give specific details as to the problem that needs to be fixed
9. Work Order Assigned To: Assign work order to property employee
10. Click the SUBMIT button to save

Once the work order has saved click the PRINT WORK ORDER button to print. AIM will ask you if you want to open or save the file, select open file and the work order will pull up in PDF. You can make changes on the service request in any section that is highlighted in blue. Any changes you make will only show up on the printed service request, they will not save in the system.

Edit / Close Work Orders

Work Orders > EDIT / CLOSE WORK ORDERS
AIM will automatically default to pulling up pending service requests. The most recent service request will be listed at the top of the screen. Choose the service request you would like to edit or complete, to complete a service request follow the steps below:

1. Work Performed:
2. Date Completed:
3. Work Order Completed By:
4. Status
5. Click the SAVE button

If you would like to edit a service request, select the service request you would like to edit and you can change any of the information that was entered in when adding the service request. Remember to click the SAVE button to save any changes you made.

There is also a DUPLICATE/DELETE button that you can select in lieu of selecting the COMPLETED button. Use this option if the work order was accidentally added into the system twice. By using this option it will keep the history record accurate at the property.

**Bulk Print Work Orders**

You can bulk print work orders by category (Pending / Completed / Unit) When you press select, AIM will print all work orders selected.

**Work Order Categories**

WORK ORDER Categories gives you a list of all work order categories in AIM, you can add additional service request descriptions by selecting NEW > Enter in the Category Abbreviation and then enter in the Category Description and click the SAVE button.

**Reports**

The Work Order Report is generated to show a list of ALL, PENDING or COMPLETED work orders at your property. The list can be generated using any date perimeters that you wish. Plug in a start date and ending date and select the type of work orders you would like to pull up on the report (ALL, PENDING, COMPLETE). Then click the SUBMIT button to generate the report.

**Work Orders By Unit**

UNIT > ALL SERVICE REQUESTS BY UNIT > select the unit you would like to see the service request history on > select VACANT, OCCUPIED or ALL > then click the SEARCH button. Select the SEARCH button again and a history of all work orders in the system for that unit will pull up on the screen. You can select by Occupied, Vacant or All.

**Chapter 6**

**AIM Forum**

AIM Forum allows you to ask questions to common problems in AIM. It also allows you to find answers to
commonly asked questions in AIM. The Forum also gives you the opportunity to give answers / post replies to others’ questions.

All questions and answers are filed by category / topic, so they are easy to locate. You can select the category to find a question/answer in that topic (or) you can create a new category by selecting NEW at the top of the page.

All categories and questions are highlighted in Blue. Anytime you select one of the topics highlighted in blue, it will give you more information or the answer to the question listed on the screen.

The AIM Forum keeps a history of all questions asked and answered, so you can scroll through the history to find information relating to these questions.

Chapter 7

Unit Maintenance

Add New Unit
Typically the only reason you would need to add a new unit to your property is if you’re building additional apartments at your community. Follow the steps below to add a new unit: UNIT MAINTENANCE > ADD NEW UNIT
1. Unit ID: new unit number
2. Building #: only add this if your property uses building numbers, otherwise leave this field blank
3. Floor Level: Enter in the floor level of the new unit
4. Unit Type: Select the unit type from the drop down menu
5. Click SUBMIT to save changes

Edit Unit
UNIT MAINTENANCE > EDIT UNIT > select unit you would like to change > the following items will appear for you to edit:
1. ADDRESS CHANGE / VIEW
2. VACANCY WRITE OFFS
3. RENTAL INFORMATION
4. SUPPLEMENTAL
5. RESIDENT ID
6. MAKE READY STATUS
7. UNIT INVENTORY
8. PREMIUM RENT PRICING
*See below for instructions on changing information for each category in EDIT MAINTENANCE
Address Change / View

UNIT MAINTENANCE > EDIT UNIT > Select the unit you would like to edit

1. **Make Ready Status**: This YES or NO will automatically change when you have completed the proper steps listed below. If you try to make a unit make ready by just changing the no to yes, when you exit unit maintenance it will automatically change back to no.

2. **Put Unit Off Line**: AIM allows you to put a unit off line for the following reasons (Renovation, Major Extermination, Model, Flood, Owner Directive, Environmental, Construction) Select Put Unit Off Line > enter reason and then add an anticipated date the unit will be back on line. Next add comments as to why the unit is off line or comments about the renovation costs or procedures.

3. **Special Status Change**: The majority of the time you should leave this blank; however you can tag units with specific information from the drop down screen, including; Model, Corporate Suite, Transfer Within Community, etc.

4. **Occupied**: This field will automatically change whether the unit is vacant or occupied

5. **Building #**: Leave this field blank

6. **Floor Level**: This will be determined depending on the unit type and the information listed for that specific unit.

7. **Unit Square Footage**: This will be determined depending on the unit type and the information listed for that specific unit.

8. **Unit Rent Special**: You can add a discounted rental rate here and it will show up on the Hot Sheet

9. **Rent Concession**: You can add an upfront move in concession and it will show up on the Hot Sheet

10. **Unit Type**: If you have added a new unit type to the property (due to renovations, w/d installation, etc.) and need to change a unit number to a different unit type, use the drop down menu here to view all unit types. Select the unit type you wish to change the unit to and click SUBMIT.

11. **Unit Notes**: Unit Notes / comments will post to the Availability Board if you enter in any information here. You can also delete unit notes by editing the field and leaving it blank. Remember to click SUBMIT to save all changes.

12. **Premium Rent Pricing**: You can add items to change the market rent like CO – Corner unit $12.

**ETC…**

**Vacancy Write Offs**

This can only be done when the resident is current. You add VACD (Down) or VACA (Admin) or VACF (Flood) to the monthly billing.

**Rental Information**

You can change market rent and required deposits for specific units by going into unit maintenance. Remember to only change market rent in between Month End and Monthly Billing.

UNIT MAINTENANCE > EDIT UNIT > select the unit you would like to change > RENTAL INFORMATION > enter in new Market Rent or Required Deposit Information > click SUBMIT to save changes

**Resident ID**

UNIT MAINTENANCE > EDIT UNIT > select the unit you would like to edit >
RESIDENT INFORMATION

Resident Information is for viewing former residents move in and move out dates.

Change Make Ready Status

UNIT MAINTENANCE > EDIT UNIT > select the unit you would like to change > change Make Ready to Y. Click Submit.

You can add comments on the Availability Board Report by entering in information under Unit Notes.

Unit Inventory

UNIT MAINTENANCE > EDIT UNIT > select the unit you would like to change > UNIT INVENTORY > ADD NEW

If you have replaced an appliance, carpet, A/C or other capital item in an apartment you can enter in the information associated with this improvement. Unit Inventory keeps track of dates installed, color, manufacturer, serial numbers, warranty expiration dates. Enter in all information you would like to keep track of and you can view the saved data at any time in the future by selecting the Inventory Item Type. (If you do not have anything in the dropdown contact the AIM Help Desk to set this feature up.)

Premium Rent Pricing

Properties can be set up with premium rent pricing if they get approval from their RPM. Premium pricing will be set up with base rent charges, then each unit will have amenity pricing added to the base rent. To set up this pricing structure, you need to create an excel spreadsheet and send it to web development so they can upload your amenities to AIM.

a. Unit Maintenance > Edit Unit > under options go to Premium Pricing > here is where you can select your amenities per unit and set up the premium pricing by unit.

Add / Edit Unit Types

Editing and adding unit types are generally added due to properties going through renovations, adding washer/dryer hookups or other new elements in selected floor plans.

To add a new unit type, follow the steps below:

UNIT MAINTENANCE > ADD / EDIT UNIT TYPES > ADD NEW >

1. **Unit Type**: Select an abbreviated unit type (example: 1X1WDLOW)
2. **Describe Unit**: Write out the unit type (example: 1 bedroom 1 bath washer/dryer 1st floor)
3. **Number of Bedrooms**: Enter the number of bedrooms
4. **Number of Bathrooms**: Enter the number of bathrooms
5. **Market Rent for This Type**: Enter in the market rental rate for this unit type
6. **Scheduled Deposit**: If there is a required refundable deposit, enter in the amount; otherwise leave the field blank
7. **Square Footage**: Enter in the total square footage
8. **Maximum Number of Occupants**: Enter in occupant maximum
9. Click **SUBMIT** to save change
If you need to EDIT an existing unit type, SELECT the unit type you would like to change > The information listed above for adding a unit type will pull up and you can edit any of that information. Once the information has been changed > click SUBMIT to save changes.

While editing specific unit types you can also change the market rent for that unit type by clicking the SELECT button under SELECT TO EDIT A TRANSACTION > change the market rent and click SUBMIT to save changes.

**Bulk Market Rent**
UNIT MAINTENANCE > BULK MARKET RENT > select the unit type you would like to edit from the drop down menu > change the market rent to the new market rental rate > click the UPDATE button to save changes.

You also have the option to VIEW ALL market rents and change all or some of the market rents at one time. UNIT MAINTENANCE > BULK MARKET RENT > select VIEW ALL (all unit types will pull up with current market rents) > edit all or individual floor plans you wish to change markets rent for > click the UPDATE button at the bottom of the page to change any changes made.

*Remember the only time you can change Bulk Market Rents is after month end and before Monthly Billing.*

**Bulk Make Ready**
UNIT MAINTENANCE > BULK MAKE READY > select unit type or building number to change status of make readies for all unit types or all apartment in the same building.

  a. By Building: Enter the first letter/number of the units in the building you would like make ready and click UPDATE. (example: Building A, select A (or) Building 1, select 1)
  b. By Type: Select the specific unit type that you would like make ready from drop down menu and click SUBMIT.

All apartments with that unit type will now be make ready

This was designed for lease up properties that have a building or more come on line at one time. It was also designed for conversion properties in AIM. All units will not be make ready when a property converts. This feature allows you to make units ready at a quicker pace.

**Hot Sheet Set Up**

To enter property specials on the Hot Sheet, go to Unit Maintenance > Hot Sheet Set Up > enter a property special, you can also enter a “Fine Print/Expiration date or details

To enter unit specials on the Hot Sheet, go to Unit Maintenance > Edit Unit > select the unit you would like to add a special or concession for > go to Address Change/View under options and locate:

Unit Rent Special: enter discounted monthly rental rate
Rent Concession: enter upfront move in discount
All vacant un-rented apartments will show up on the Hot Sheet.

**Asking Rents**
On the home page of AIM, located at the top of the menu bar, there is an asking rent input button. To add asking rents to the availability report and the hot sheet select this button to view all unrented vacate and apartments and unrented on-notice apartments.

AIM will pull up a list of all vacant apartments, which you can then enter the Asking Rent, required Lease Term and Up Front Concession for each unit. AIM will then show you the Net Effective Asking Rent after you complete this information.

Asking Rents is the rental rate you require to have the apartment rented for on a monthly basis. This allows your leasing agents to know what is the lowest price they can rent the apartment for in order to close the prospect.

Asking rents also shows you the number of days the apartment has been vacant; in addition to the average rent and former rental rate on the same apartment. These things will help you to determine where to set your asking rents in order to maintain or increase gross potential rent.

After you have entered in the information, press SUBMIT to save the changes. There is also an on-notice tab where you can set asking rents for apartment on-notice to vacate.

**Reports**
The following reports are located in the UNIT MAINTENANCE section:

1. **Actual Rents vs. Market Rent Detail:** Gives a list of all residents showing actual rents, vs. market rents. Report also lists move in date, lease begin and end date and deposit amount.
2. **Hot Sheet:** Shows a list of all make ready units available for rent. Users can add rent specials and move in specials to the hot sheet by going to Unit Maintenance > Edit Unit
3. **Market and Actual Rents by Unit Type:** Breaks down each floor plan type by market rent, square footage, actual rent and loss to lease. Report also gives a snap shot of the properties performance / current statistics.
4. **No Rent Billed Report:** Gives a list of all units who were not billed rent during the current accounting period
5. **Rent Roll Detail:** Provides a detailed list of each individual monthly billing charge by unit number for the current accounting period.
6. **Rent Roll Summary:** Provides a monthly billing total (not broken down) for each unit number for the current accounting period.

**Chapter 8**

**Accounts Payable**

**Vendor Maintenance**
Allows you to change information on existing vendors, such as phone, address, insurance information and requirements, Tax ID and assign or delete a GL Code the vendor is assigned to.
ACCOUNTS PAYABLE > VENDOR MAINTENANCE > select the vendor you would like to edit information on > change the data in any area you would like to update > click SUBMIT to save changes (VENDOR ID CANNOT BE CHANGED)

Add Vendor
ACCOUNTS PAYABLE > ADD VENDOR

1. **Vendor ID:** You have to request a vendor ID from accounting prior to entering the vendor into the system
2. **Vendor Name:** Enter in the name of the vendor you are adding to the system
3. **Attention:** This field is not required; however if you would like the payment to go to a certain department, complete the information.
4. **Address:** Enter in the vendors address, including City, State and Zip Code
5. **Contact:** If you have a contact name at the company, enter in the information, otherwise leave the field blank.
6. **GL Account:** If you would like to assign a specific GL Account Code to the vendor enter in the code here. If this filled out, every time you submit an invoice for this vendor the assigned GL Account Code will appear. Only complete this if the vendor uses the same GL code for every invoice.
7. **Phone Number:** Enter in vendor’s phone number. This is a required field.
8. **Fax Number:** Not a required field; however complete the information if you have it.
9. **Need Insurance:** All vendors who perform work at your property are required to have insurance. Only vendors who you order supplies from and do not physically come out to perform a service are exempt from having insurance. Mark YES for all service vendors.
10. **Need PO:** Most properties do not require PO’s. If you property does not use PO’s, mark NO.
11. **Limits:** Limits are set for approval when entering bills. Leave default of YES.
12. **Insurance Expires:** Only enter if the vendor is required to have insurance. Otherwise leave blank.
13. **PO Note:** Not a required field; go ahead and leave blank.
14. **Comment:** Not a required field; go ahead and leave blank.
15. **Terms:** All terms should Net 30; enter in N30D
16. Click SUBMIT to add vendor

Chart of Accounts
ACCOUNTS PAYABLE > CHART OF ACCOUNTS
ONLY RPMS AND VPS HAVE ACCESS TO ADD CHART OF ACCOUNTS

ADD NEW CHART OF ACCOUNTS
Click NEW > add the following information

1. **GL Account Code:** enter in the four to six digit numeric account code associated with the GL description
2. **Description:** enter in the name or the GL Account Code
3. **Grouping:** enter in the grouping type from the drop down menu (Admin, Contracts, Make Ready / Turnover, Marketing, Repairs and Maintenance, Recurring, Reserves, Taxes and Insurance or Utilities)
4. **Limits:** enter YES to set limits or warnings when going over budget amounts
5. **Over Budget:** enter 100 for warnings if you go over 100% of your budget
6. **Over Budget Dollar Amount:** if you would rather have a set dollar amount that you spend to set
limits on, enter in the dollar amount; otherwise leave the field blank
7. Click **INSERT** to add account code

**VIEW / EDIT CHART OF ACCOUNTS**
Select the GL Account Code you would like to edit or view > (you will not be able to change the GL Account number; however you can edit anything else associated with the GL Account Number) To change the GL Account Code, submit a Help Desk Ticket. You can change any of the following information listed below:
1. Description
2. Grouping
3. Limits
4. Over Budget
5. Over Budget Dollar Amount
6. Click **UPDATE** to save changes

**New Invoice**
ACCOUNTS PAYABLE > NEW INVOICE > select vendor from by entering vendor name or scrolling the vendor list
1. **INVOICE #:** Enter in the invoice number. AIM will not allow duplicate invoice numbers, if you enter in an invoice and find that the same invoice number has already been entered, DO NOT CONTINUE. Exit New Invoice and go to EDIT / FIND INVOICE to research the invoice number. After you have reviewed the invoice and determined it is not a duplicate invoice, you can alter the invoice number to continue. If the invoice has been entered into AIM, contact the vendor to see if they have received payment. If they still show the invoice as outstanding, contact your property accountant to see if a check has been sent and if it has cleared the bank

*Do not alter the invoice number without researching the duplicate invoice number first.
2. **DATE:** AIM will automatically enter in the system date as the invoice date; you can edit this to back date the date of the invoice.
3. **DUE DATE:** AIM will automatically enter in a due date of 30 days after the invoice date. If you change the invoice date, you will need to change the due date as well
4. **TOTAL:** Enter in the total amount of the invoice
5. **DESCRIPTION:** Enter in a description of the invoice
6. Click **CREATE INVOICE** (once the invoice has been created, you have to instruct AIM where you want the invoice to be applied to)

Skip to New Distribution Line and enter in the following information regarding the invoice

7. **UNIT:** AIM will automatically enter in COMMON unit for the unit number; however if you have done work or replaced a specific item in an apartment number, change this from Common to the actual Unit Number.
If your invoice is a utility bill with several different apartment numbers, change the Common unit to each Apartment Number and enter in amount / information for each unit.
8. **GL ACCOUNT:** Select the GL Account from the drop down list (or) if you know the GL Account, just
enter in the 4 to 6 digit number If the vendor you are entering an invoice for is assigned a specific GL Account Code, this will automatically appear on the Current Invoice Distribution. If this GL Account Code is incorrect, you do not have to exit or delete the invoice, just click DELETE on the CURRENT INVOICE DISTRIBUTION and it will automatically delete the assigned GL Account code. You can then enter in the GL Account code you would like to assign for the invoice.

9. **AMOUNT:** AIM will automatically enter in the total amount of the invoice; however if you have more than one item to pay with different GL account codes, change the amount to the correct amount for each specific item.

10. **DESCRIPTION:** AIM will automatically fill in the description from what you entered at the beginning of the invoice; however if you have specific items you are coding with separate GL Account codes; change the description for each item. If you do not change the description for each item entered, your Invoice by Vendor/Supplier will only show the description you entered at the beginning of the invoice. This will raise questions with your RPM and they will contact you to find out what the amounts were for.

11. **ADD DISTRIBUTION:** Once you have entered in all other information click ADD DISTRIBUTION. If the total matches the total of the invoice, you can PRINT THE INVOICE. If you are adding additional GL Accounts to complete the invoice, repeat the steps above until your distribution matches the invoice total.

12. **PRINT INVOICE COVER SHEET:** If the invoice looks correct, click PRINT INVOICE COVER SHEET and staple it to the actual invoice.

13. **NEW INVOICE DIFFERENT VENDOR (or) NEW INVOICE SAME VENDOR:** After you have printed the Invoice Cover Sheet, your invoice is complete. To move forward you have the option to either enter in a new invoice with a new vendor or enter in another invoice for the same vendor. If you enter new vendor, AIM will take you back to the vendor list. If you enter in the same vendor AIM will take you to the vendor and you can select them again to enter in another invoice.

**How To Enter Petty Cash In AIM**

If you are trying to enter petty cash in AIM:

#1 TIP- YOU NEED TO STAY CONSISTENT WITH HOW YOU ARE ENTERING YOUR PETTY CASH IN AIM.

Email the accountant to set up the petty cash custodian in AIM. This will be six characters in length and will be likely be characters selected from the custodian’s name. EVANBR is an example.

Once the petty cash custodian has a Vendor ID, the custodian will need to be set up in AIM as a vendor.

To do this:

- Select Accounts Payable on the left hand side of the main page of AIM
- Select Add Vendor
- Under Add New Vendor, enter the required information in the Vendor Detail
- The Vendor ID you will receive from the account
- In the field:
  - Vendor Name: Enter the name of the petty cash custodian
  - ATTN: N/A
  - Address, Address 2, City, State, and Zip: Enter the property address
  - Contact: N/A
  - GL Account: N/A
o Phone Number: Enter the property phone number
o Fax Number: Enter the property fax number
o Need Insurance: No
o Need PO: No
o Limits: No
o Insurance Expires: 12/31/2099
o PO Note: N/A
o Comment: N/A
o Terms: N/A

* Click Submit

Now that the petty cash custodian has been set up in AIM, the invoices may be entered. To do this:

- Select Accounts Payable on the left hand side of the main page of AIM
- Select New Invoice
- Under “New Invoice - Choose a vendor to enter an invoice for,” there is a field titled Search by Vendor Name. Enter the vendor ID of the petty cash custodian in this field and click Search (EX: EVANBR)
- Click select to the left of the Vendor Number
- In the field Invoice Number, use DATE OF ENTRY-PTTYCSH (EX: AUG-13-2014-PTTYCSH). The invoice number must always be entered in the same format so as to avoid double paying.
- In the field Invoice Date, select the day of entry. This should also match your Invoice Number.
- In the field Due Date, select the day of entry.
- In the field Total, enter the total of all receipts being submitted for reimbursement.
- In the field, Description, enter a brief description of what each receipt was for. This is similar to how the Petty Cash sheet in AIM is used (EX: Manager meeting, office supplies, resident refreshments, etc.)
- Click Create Invoice

Now it’s time to split the total by entering each receipt separately according to the GL code. Let’s say we have $100 in receipts - $25 is for gas, $30 is for postage, and $45 is for Other Admin.

- Unit: Common
  - G
  - L
  - Ac
  - ct: 50
Repeat this process until all of the receipts have been distributed. The total of the receipts will need to match the invoice total for the invoice distribution to be complete.

**Edit / Find Invoice**

ACCOUNTS PAYABLE > EDIT / FIND INVOICE > do a search for the vendor name or invoice number you would like to edit / view by entering in the information in the box provided and click SEARCH > all invoices for the vendor or invoices with the invoice number you entered will appear, you can Edit / View the invoice by clicking SELECT.

Once you find the invoice you are looking for, the invoice will appear on your screen. If the batch is still open you have the ability to change the information and save it by using the steps above for NEW INVOICE. If the batch has already been closed you will only be able to view the invoice.

**View Open Batch**

ACCOUNTS PAYABLE > VIEW OPEN BATCH

AIM allows you to view all the invoices in an open batch you have entered in the system. You have the ability to select these invoices and make changes / edit them or delete them before you close the batch.

This is a quicker way to access open batch items than going to Edit / Find Invoices.

**Close Batch**

ACCOUNTS PAYABLE > CLOSE BATCH > CLOSE CURRENT BATCH

If you select view current batch it will take you back to VIEW OPEN BATCH, which is a list of all invoices entered into AIM for the current batch. If you choose to View Open Batch, you will have to go back to Close Batch to actually close the current batch.

When you select Close Current Batch, if there are any invoices that have not been completed in AIM or still require distribution, AIM will take you to the invoice to fix before you can close the batch. If this
step is required, you will have to go back to Close Batch to close the current batch.

Once you select CLOSE CURRENT BATCH, AIM will automatically create the next batch number > select (AIM Automatically pulls up the current or most recent batch number to print) If you need to change the batch number, select the batch number from the drop down menu. Starting and Ending Batch Numbers should be identical > click SUBMIT

- Print the Invoices By Vendor by selecting the print icon at the top right hand of your computer screen.
- Save the Invoices By Vendor by selecting the format (PDF) and click EXPORT
- Save the report to your AP Folder (example: Property Code/Report# or Name/Month/Batch Number / Year)
  (example: EC1_IV_5.2.10.PDF)

AP Batch Export

The accounting department requires a specific format of the Invoices By Vendor Report in order to download it directly into their accounting software program. This step takes place of going to the AMC Intranet and uploading the AP

ACCOUNTS PAYABLE > AP BATCH EXPORT > check the batch you would like to save (if the batch has not been close, it will not show up in the list of batches to export) > EXPORT TO CSV (once you have selected the batch, you can display the details first to make sure it is the correct batch, then select hide details)

- DO NOT OPEN to Excel . Just save to your AP Folder (example: Property Code/Report Name or Name/Month/Batch Number / Year) (example: EC1_IV_CSV_5.2.10.)
- After you have saved the CSV file, you will need to send your RPM and Accountant an email, attaching both Invoice By Vendor reports. Included in the email, send any other attachments associated with the AP Batch, including; AP Cover Sheet, Check Requests, Petty Cash Reimbursements, etc.

Initiation

ACCOUNTS PAYABLE > INITIATION

AIM allows you to edit property set up information for Accounts Payable including; month end dates; PO’s, AP Period and AP Handling. **DO NOT EDIT ANYTHING IN INITIATION WITHOUT RPM APPROVAL!**

1. **AP PERIODS:** You can edit any Unlocked Periods / Future AP periods by selecting EDIT > change the dates > UPDATE to save changes
2. **MONTH END:** You can edit the month end date by entering in a new date for the current month and selecting UPDATE
3. **AP HANDLING CODES:** You can EDIT / DELETE or ADD NEW Handling Codes
4. **AP TERMS:** You can EDIT / DELETE or ADD NEW Terms
5. **SHIPPING:** You can EDIT / DELETE or ADD NEW Shipping

**Reports**

The following reports are located in the ACCOUNTS PAYABLE section:

1. **AMC Check Request:** Blank form with writeable cells.
2. **AMC Petty Cash:** Blank form with writeable cells
3. **AP Draw Cover Sheet:** Blank form with writeable cells
4. **Invoice Cover Sheet:** Provides a breakdown of invoices in a batch by: vendor ID, vendor Name, invoice number, date and amount. Report also provides a batch total.
5. **Invoices by GL Code:** Breaks down invoices paid in each batch by GL Code
6. **Invoices by single GL code:** Breaks down invoices with specific GL code
7. **Invoices by Unit:** Breaks down invoices paid for specific unit numbers
8. **Invoices by Vendor / Supplier:** Breaks down invoice paid in each batch by Vendor Name

All forms that are necessary to be completed for the current AP batch, should be filled out in AIM, printed and scanned into your computer to be saved in my documents in folders labeled Accounts Payable. These forms should be emailed with the Invoices by Vendor and Accounting Export (Invoices by Vendor CSV file) to both your RPM and Accountant.

**Chapter 9**

**SODA**

**Complete S.O.D.A. (Statement Of Deposit Account)**

You can access a SODA three different ways, all are listed below.

RESIDENTS > DEPOSIT REFUND > select resident you would like complete a SODA for

RESIDENTS > RESIDENT DATE UPDATE > select the resident you would like to complete a SODA for (make sure to use the FORMER search when trying to locate the resident) > DEPOSIT REFUND

On the top menu bar, select the paper icon (this is your TO DO LIST) any former resident with a balance in their account ledger or deposit ledger or both will appear here.

All lease holders must be listed on the SODA. In order for all lease holders to appear on the SODA, they must be listed in Additional Information on the Resident Date Update screen, with their demographics.

1. **ADDRESS CHANGE:** update with the new forwarding address of the resident and then click UPDATE AND START PROCESS. (Summary link if doing a revision)

2. **POSSIBLE CHARGES:** select the charges you would like to enter on the deposit refund. AIM will require you select one charge in each area.
The charges listed here, have been previously entered in by your RPM; according to the cleaning and damages addendum your resident received at move in. The charges are also based off of the size of apartment. (If the charges are incorrect, please contact your RPM)

a. Painting Charges:
   i. Full Paint - AIM will prorate this charge for you automatically depending the cleaning and damages addendum the residents received at move in; in addition to how long the resident has lived at the community.
   ii. Partial Paint
   iii. Touch Up Paint

b. Cleaning Charges:
   i. Unit Cleaning Fee
   ii. Partial Unit Cleaning Fee

*All charge amounts listed can be changed by editing the amount. If there is something you do not want to charge, change the amount to zero (or) you can delete the charge later in the SODA process.

After charges have been selected, click UPDATE DEDUCTIONS and NEXT.

3. REPLACEMENT CHARGES: select the charges you would like to enter on the deposit refund by selecting the POST box. (you are not required to enter anything; however most of your replacement costs and damages are listed here.)

   a. AMOUNT: If there is not a cost for the replacement charge listed, enter the amount in the field box next to the charge. If the amount is incorrect, you can edit it by changing the amount in the box.
   b. QUANTITY: If you would like to charge for more than one item, enter the number of items you would like to charge in the Quantity Box and AIM will automatically change the amount due on the SODA to the quantity X amount.

When all charges have been entered, click UPDATE REPLACEMENTS and NEXT

4. OTHER POSSIBLE CHARGES: AIM allows you to delete, edit or add additional charges
   a. DELETE: to Delete a charge, select the DELETE Button and AIM will remove the charge from the SODA.
   b. EDIT: AIM allows you to edit the comment or the amount of the charge. If you make any changes to these fields, always select the SUBMIT button to save the changes.
   c. ADD: At the bottom of all the other charges you have already entered you can add additional
charges.
   i. Description: find the charge code you would like to enter a charge for
   ii. Comment: enter a comment for the charge you selected
   iii. Amount: enter the amount of the charge
   iv. Select SUBMIT to save the charge on the SODA
   v. If you would like to add another charge, repeat these steps until all charges have been entered.

Final Utility charges will also be listed on this screen. AIM will automatically prorate the final utility based on the last utility bill and the numbers of days the resident has lived in the apartment since the last bill. (If you need to alter this amount, you can.)

After all charges have been entered, select UPDATE and NEXT to proceed to the next step.

5. ADD NEW NOTE: Select or enter a note that will appear on the SODA.
   a. Add New Note: select add new note and type in a message
   b. Select Existing Note: use the drop down button under description and choose one the notes you have already entered into AIM > press SUBMIT to add this note to the SODA.

6. SUMMARY OF CHARGES: review the SODA to ensure all charges have been entered and the refund or amount due from resident is correct. (remember that if you alter the current charges or add new charges to select Update Description and Amounts, in order to save changes)
   
   If the SODA is not correct, you can edit, delete or add charges before proceeding. Once the SODA is correct, select PRINT DISPOSITION and NEXT

7. PRINT/SAVE SODA: select SUBMIT to view the SODA.
   a. Print: Use the print icon on the top right hand side of the computer and send a copy to the resident.
   b. Save:
      i. Select Format (Acrobat PDF File)
      ii. click EXPORT to save the file
      iii. Click SAVE to put the file in your document on your computer
      iv. Create a file folder for Move Outs (if you haven’t already created one) by selecting NEW FOLDER.
         If you do have a move out folder, select it.
      v. Create another file folder for the Unit Number of the move out (if you haven’t already created one) by selecting NEW FOLDER. If you do have a unit number folder, select it.
      vi. Create another file folder for the Resident of the move out, by selecting NEW FOLDER. Label this folder by the resident’s last name. Open this folder and save the SODA in this folder. Label this document SODA/last name of the resident/move out date.
8. POSSIBLE WORK ORDER ITEMS: You can choose to create a work order or bypass the work order for all deductions and replacements costs listed on the SODA. All items will be listed on one work order that you can give to your maintenance team. The work order will help them to know what is needed and how much time needs to be allotted in turning the apartment.

   After you complete the SODA, you will need to go to WorkOrders > Edit/Complete Service Requests > to print the work order (the work order will be listed at the top, as it will be the most recent work order submitted in AIM) > select the work order and Print.

9. POSSIBLE INSURANCE CHARGES: If you are part of the Renters Insurance Program, and there are charges listed on the SODA that could be deemed as potential insurance claims, AIM will bring up a form that you can create and print to submit to the insurance company for possible reimbursement.

   Select Create Insurance Form and Next (or) Don’t Create Insurance Form and Next. FINAL CHARGES: Verify that the final amounts on the SODA are correct and select I APPROVE THESE AMOUNTS. (Do not click if the ledger is correct and you are only changing the paper)

   AIM will then post, refund and apply any deposits necessary; in addition if there is a balance owed at move out, AIM will reverse all other income charges and write off the rent to LOST.

   If the final amounts are not correct, select SUMMARY and AIM will take you back to the summary of charges where you can edit, delete or add charges to the SODA. After you make these changes, continue on with the SODA process until you approve the final amounts.

   AIM will automatically take you to the residents deposit ledger screen. If the resident is due a refund, you are required to send a copy of the deposit ledger with the SODA to the accountant; otherwise they will not process the refund. Select Print Ledger and save in as a PDF in the same folder you saved the SODA.

   Open balances on the resident ledger drive what will be reversed from a disposition so make sure these are correct before starting. They also drive where you can pay a payment to and for how much. If you received partial payment error check these.

*You can re-print a SODA at any time by going back into Deposit Refund and going directly to the SUMMARY to print the SODA. It will show all charges; plus the refund or balance due.

SODA for DENIED/CANCELLED RESIDENT: Because this prospect will not have deductions or replacement charges, go to Deposit Refund and go directly to the Summary. You can add a negative charge on the summary page for the nonrefundable fee you need to refund. This will give the resident a credit and AIM will refund the credit to the resident.
Complete the SODA as normal from this point on to bring the resident to a zero balance.

**Revising a SODA**

If you make a mistake on a deposit refund, you are required to fix the SODA in AIM and re-print the SODA with the correct refund showing so accountings records match AIM’s reporting records.

To revise the SODA, go to Residents > Deposit Refund and select your resident. Instead of starting the complete SODA process over, select SUMMARY under the options menu. AIM will give you a list of all the charges you already entered on the SODA.

**ADDING ADDITIONAL CHARGES:** If you forgot to enter a charge on the SODA, go to Deposit Refund under options on the Resident Data Update screen > then go directly to the SUMMARY page (if you start the process from the beginning, you will double charge the residents) Once you are on the summary page select charge and enter the type of charge you would like to enter from the drop down list, under comment enter the reason for the additional charge, then enter the amount of the charge and select SUBMIT. Once all new charges have been entered and submit

NEXT. Continue on with the remaining steps in the SODA process until you zero out the account by selecting I APPROVE THESE AMOUNTS. (Don’t approve if ledger is correct…you are done)

*AIM will automatically alter the refund amount to match the revised SODA.

**Make sure a refund check has not been sent to the resident prior to adding additional charges. Otherwise the refund issued to the resident and the refund in AIM will not match. You will be required to send a copy of the deposit ledger with the revised SODA to accounting, so they know the refund check matches the refund in AIM.

***Make sure to forward a copy of the new revised SODA to the resident letting them know what their new refund will be.

**REMOVING A CHARGE:** If you overcharged a resident and need to remove a charge from a SODA, go to Deposit Refund under options on the Resident Data Update screen > then go directly to the SUMMARY page (if you start the process from the beginning, you will double charge the residents) Once you are on the summary page select charge and enter the type of charge you would like to remove from the drop down list, under comment enter the reason why you are removing the charge, then enter the amount of the charge as a NEGATIVE AMOUNT and select SUBMIT. Once all new negative charges have been entered and submitted, select PRINT DISPOSITION and NEXT. Continue on with the remaining steps in the SODA process until you zero out the account by selecting I APPROVE THESE AMOUNTS.

*AIM will automatically alter the refund to match the revised SODA.

**If the resident has already received their refund check, make a note on the SODA when sending it to accounting, letting them know that this is a revised SODA and that they should only be cutting a check for a portion of the refund. The actual check/checks sent to the resident need to match the refund in AIM. You will be required to send a copy of the deposit ledger with the revised SODA to accounting, so they
know the refund check matches the refund in AIM.

***Forward a copy of the new SODA to the resident, so they are aware they will be getting an additional refund.

RESET DEPOSIT REFUND
If you need to start the SODA process over after you have completed it, due to an error and you have not sent the refund check to the resident yet, you can reset the SODA by going to RESIDENTS > RESET DEPOSIT REFUND > select the resident you would like to reset and click PROCESS. (only SODA you have completed in the current accounting month will show up here.)

After you select process AIM will take you to the residents data update screen, where you can go to Deposit Refund. Go directly to the SUMMARY and you will be able to view all items you previously entered on the SODA and either delete the charges or add additional charges. After you have made your changes, complete the SODA as normal.

*Reset a deposit refund, only removes the charges posted to the account ledger and deposit ledger. It makes the resident account look as though the SODA was never completed; however all SODA charges will still be in the system, just not posted yet, so you can make the necessary changes.

COLLECTING BAD DEBT:
To enter a payment for bad debt, go to Charges and Payments > Post Transaction > select the former resident you wish to enter a payment for > change the type of payment to a C for Charge > select BDCO (bad debt collected) as the CODE > enter in the amount of the payment > change stay on the resident to YES > press SUBMIT.

This will create the charge so the resident now owes a balance. After the charges have been entered, go ahead and make a payment to the account with the funds you have received and post the payment to bring their account ledger back down to a zero balance.

i. if the payment is a check, enter a PMT
ii. if the payment is a money order, enter a PMTM
iii. (or) if the payment is a credit card, enter a PPCC

Chapter 10

System Utilities

System Date
SYSTEM UTILITIES > SYSTEM DATE > click the ADVANCE DATE button
AIM requires you to forward the date manually every day. In order to forward the system date, all open items will need to be completed prior to forwarding the date. AIM will not allow you to forward the date if the following need to be completed:

1. **Open Bank Deposit Batches**: Close the batch to continue
2. **Move-Ins**: Either move in the resident(s) or change the move in date
3. **Move-Outs**: Either move out the resident(s) or change the move out date
4. **Month End**: Either change the month end system date or complete month end
5. **Autobill**: Apply auto bill before forwarding date to the 2nd of the month

By selecting **25 Items in a Batch**: AIM will only allow each bank deposit batch to be 25 items or less. If you unselect this box, AIM will allow you to post more than 25 items per bank deposit bank. (If you use a Wells Fargo check scanner, you must click the box to only allow 25 items per batch)

By selecting **Set Prorates to be based on 30 day Calendar Month**: AIM will change all prorates to be based on 30 days every month instead of the number of days that are actually in the current month. By unselecting this box, AIM will base all prorates on actual days in the month.

By selecting **Round Prorates to Nearest Dollar**: AIM will base all prorates on a dollar figure instead of cents. If the prorate is less than .50 cents, the prorate will adjust down to the nearest dollar. If the prorate is over .51 cents the prorate will adjust up to the nearest dollar. If you unselect this box, prorates will be set at the exact amount for both dollars and cents.

**Month to Month Fee**: insert your property’s MTM fee (default is set at $100) **NSF Fee**: insert your property’s NSF fee (default is set at $20)

**On Expire Date Bump to Market Rent/Mid Month Renewals**: select YES or NO (default is set to Yes)
- **YES**: Property will automatically roll expiring leases to Market Rent and charge the MTM Fee. Mid Month renewals will also be in effect, when leases expire mid-month, they will be charged the new rental rate mid month when the date is forwarded after the renewal is entered.
- **NO**: Expiring leases will not be charged market rent or MTM fee, you will have to manually add these charges before monthly billing to avoid missed income opportunities.

**Default Payment Type**: select properties most common payment type (AIM automatically defaults payment type to P-PMT)

**Property Settings**

SYSTEM UTILITIES > PROPERTY SETTINGS
Under System Settings, AIM gives you the ability to change some of the property information, including: Property Name, Owner and Manager Name. AIM also allows an RPM to RE-OPEN a closed Bank Deposit Batch or AP Batch.

**ONLY RPMS AND VPS HAVE ACCESS TO CHANGE PROPERTY SETTINGS.**

TO RE-OPEN the batch:

1. Find the column P_JOURN: Bank Deposit Batch change Journal Number)
2. Find the column TRANSBATCH: AP Batch (change AP Batch Number)

Click SUMBIT to save changes

**Accounting Export**

Accounting Export has been set up in the Run Month End section of System Utilities, we no longer need to use it in this section. Please refer to your month end instructions.

**Property Contacts**

SYSTEM UTILITIES > PROPERTY CONTACTS > NEW

AIM will store any contact numbers and information you enter into the system for quick reference. These numbers can be employee contact information, vendors or others numbers you need access to.

You can also Edit or Delete the existing contact information by SELECTING the contact name you would like to change. Enter in any changes and select UPDATE or select DELETE if you would like to remove that contact information from the system.

**Add/Edit Users**

Only managers have access to change passwords: SYSTEM UTILITIES > ADD/EDIT USERS > select the employee you would like to edit information on

1. **Delete:** You can delete users if an employee is no longer at your property by pressing delete
2. **Password:** You can change the employee’s Password by entering in a new one in the blank field provided and selecting SUBMIT
3. **Access Level:** RPM’s can change the employee’s Access Level by using the drop down menu.
   a. Manager: All access, including edit users, No Editing Mnemonic Codes
   b. Assistant: No Accounts Payable access
   c. Leasing: No Accounts Payable access
   d. Traffic: No Accounts Payable or Move-In ability
   e. Maintenance Supervisor: Complete work orders
   f. Maintenance: Read Only - view tickets
**Run Month End**
All month end requirements/procedures can be done from SYSTEM UTILITIES > RUN MONTH END page, you can also view the latest month end procedures from this page. Please see Chapter 13 on instructions for completing Month End.

**Dispo Set Up**
System Utilities > Dispo Set Up *(Only RPMs and VPs can make changes to Dispo Set Up.)* All charges must be entered per property and will be saved in the property’s data base when completing all SODA’s.

a. Enter all Deductions for Studio / 1, 2, 3 and 4 bedroom apartments for painting and cleaning charges; press SUBMIT to save.

Enter any property charges and amounts; then press SUBMIT to save.

**Rent Increase Indicator Set Up**
Site teams will be forced to increase market rents when processing monthly billing each month. Market rent increases will be done according the LTOL % the RPM inserts into AIM.

To enter the desired LTOL percentage go to System Utilities > Rent Increase Indicator Set Up > enter in the desired LTOL percentage for the property and select SUBMIT to save.
(Percentage must be entered per property and will be saved in the property’s data base when increasing market rents.)

**Monthly Expirations**
RPMS have access to limit the number of expirations at each property; in addition they can set the minimum and maximum lease terms at the property.

SYSTEM UTILITIES > MONTHLY EXPIRATIONS > enter in percentage of expirations you would like to expire each month > enter in lease terms > press SELECT to save.

**Chapter 11**

**Reports**

All AIM reports can be found in the reports section. They are broken down by category, but can also be found in ALL REPORTS. Reports can also be found in other sections of AIM, in their specified category.

**Viewing Reports**
Select the report you would like to view > change the defaults to the specific date or information you are looking for (or) keep the defaults and click SUBMIT to view the report on your computer screen.
After you set the parameters for the report you would like to view, you can change those parameters while viewing the current report. Scroll up to the top of the page above the report and you can change these settings without exiting the report you are currently looking at. Once you select the new parameters, the new report will pull up on the screen.

When viewing a report in AIM you can only view one page at a time. You are able to scroll up and down that page; however to move from page to page you have a couple of options:

1. Use the arrow/triangle buttons in the gray highlighted bar above the report; however below the parameters you set to view the report. There are four different arrow (triangle) buttons that will allow you to move from page to page or from the first page or last page of the report.
   a. By clicking the Left Facing Arrow/Triangle with the vertical line in front of it - it will take you to the first page of the report
   b. By clicking the Right Facing Arrow/Triangle with the vertical line behind it - it will take you to the last page of the report
   c. By clicking the Left Facing Arrow/Triangle - it will take you to the previous page of the report (page by page)
   d. By clicking the Right Facing Arrow/Triangle - it will take you to the next page of the report (page by page)

2. Use the box/field in between the arrow/triangle buttons and replace the number 1 with the page number of the report you would like to view. Then select enter.

If you have a hard time viewing a report on the computer screen because the font is too small, use the 100% box/field and adjust the percentage to make the report font bigger or smaller. When clicking this box a drop down menu will appear with different options for viewing.

If you need to find something specific on the report, use the blank box/field next to the FIND/NEXT, type in a key word, name or dollar amount you are looking for and select ENTER. If that keyword is on the report anywhere, AIM will find it and highlight the word/amount for you.

To print a report, use the PRINT ICON on the top right hand side of the report.

Anytime you are looking for a specific report and it is not listed in the section you thought it was, you can click on SHOW ALL REPORTS and AIM will bring up a list of all reports in the system.

How To Export (Save) A Report

Exporting a report allows you to save a report on your computer. By saving a report you can email it or open and view it at any time. After you have the report open in AIM, click the SELECT A FORMAT box/field and use the drop down menu to select the format you would like to save the report in. You have the following options:
1. XML file with report data
2. CSV file (comma delimited)
3. Acrobat (PDF) file
4. MHTML (web archive)
5. Excel
6. TIFF file
7. Word

Once you decide on the format you would like to save the report as, click EXPORT. Your computer will then ask you if you want to OPEN or SAVE the file. Click the OPEN box to view the report or you can click the SAVE box and just save the file immediately. If you selected OPEN, your computer will then open up the report in that specific format and you can now save the report. Find the disk icon or the save button on your computer and select it.

When saving the report, label it with your 3 DIGIT PROPERTY CODE, the REPORT NAME and the DATE (example: CWA Monthly Transaction Summary 7.31.10) After you have labeled your report, select which folder you would like to save it in and click SAVE.

You will want to create folders in your My Documents to keep all of your reports organized. Do not save reports to your desktop! (After a month of using AIM you will not be able to locate these files very easily because there will be too many on your desktop.) Create folders for each Accounting Month End, Every, Accounts Payable Batch and other reports you save frequently.

You can create folders in My Documents by selecting NEW FOLDER and then naming the folder. Anytime you open up My Documents all of your folders will be listed. Select the folder you would like to open and all items saved in that folder will be listed in alphabetical order.

**The majority of the time you should save reports as Acrobat (PDF) files.** PDF files can’t be altered, which is the reason you should save your files in this format. Anytime you send a file in a different format you risk the chance of someone changing or deleting something on the report; whether it was accidental or intentional. Anytime you are saving reports for Month End or Accounts Payable, or forwarding to a client, always save them as a PDF.

You can save reports in different formats for your own property use. RPM’s may use different formats as well because they can add additional information to the reports to create spreadsheets.

There are specific reports where your accountant will require reports in a CSV file; however there are specific areas in AIM where you are to use the CSV file. Do not create them just under reports. Use the Account Export under System Utilities and A/P Batch Export under Accounts Payable.

**Accounts Payable**
REPORTS > ACCOUNTS PAYABLE

1. **AMC Check Request**: Blank form with writeable cells.
2. **AMC Petty Cash**: Blank form with writeable cells
3. **AP Draw Cover Sheet**: Blank form with writeable cells
4. **Invoice Cover Sheet**: Provides a breakdown of invoices in a batch by: vendor ID, vendor Name, invoice number, date and amount. Report also provides a batch total.
5. **Invoices by GL Code**: Breaks down invoices paid in each batch by GL Code
6. **Invoices by Single GL**: Breaks down invoices paid with specific GL code
7. **Invoices by Unit**: Breaks down invoices paid by unit number
8. **Invoices by Vendor / Supplier**: Breaks down invoice paid in each batch by Vendor Name

**Residents**

**REPORTS > RESIDENTS**

1. **Aging Delinquency**: Breaks down delinquency by resident for current month, prior 1 and prior 2 accounting periods. The aging delinquency report also gives a total of the balance due.
2. **Aging Delinquency Comprehensive**: Breaks down delinquency by resident for total rent due, other due, late fees accrued, on-notice credits; providing a sub total and total amount due.
3. **All Resident List**: Provides a list of all current residents with phone numbers, move in and move out dates and lease expiration dates.
4. **Lease Expiring by Period**: Breaks down resident lease expirations by month; in addition it gives a detail report by month of total expirations 24 months out.
5. **Move In Report**: List of move ins, generated by specific dates entered.
6. **Move Out report by Date Range**: List of move outs, generated by specific dates entered.
7. **Prepaid Rent Report**: List of all prepaid rents with balances coming into the month and ending prepaid balances.
8. **Profile Demographics**: Gives a summary of all resident’s demographics
9. **Resident Accounting Ledger**: View resident ledger
10. **Resident Listing CSV File**: List of resident reports in a csv format for ReRemind (Bascom properties)
11. **Resident Mail Merge**: Create letters with resident info on it.
12. **Residents On Notice**: Gives a list of all residents on notice to vacate.
13. **Security Deposit owing**: Provides a list of required deposits versus deposits paid in.
14. **Summary of Resident Balances**: List of all resident charges, payments and balances for the current accounting period. Report shows both prepaid and delinquent accounts, in addition to accounts at a zero balance.
15. **Vehicle Look Up**: Provides an area to enter vehicle information and find out who the vehicle belongs to on the property.

**Traffic**

**REPORTS > TRAFFIC**

1. **Traffic Report**: Provides a detailed traffic list; with specific date ranges. The report will include traffic information along with leasing agent, dates, apartment style and lease decision.
**Transactions / Banking**

REPORTS > TRANSACTIONS / BANKING

1. **Bank Deposit Combined Detail**: Breakdown multiple payments and provides the check numbers for both payments entered in a combined payment.
2. **Bank Deposit Detail**: Breaks down each individual payment or charge posted in a deposit batch; plus gives the running total for the deposit batch.
3. **Bank Deposit Summary**: Totals all bank deposit batches for the current accounting month.
4. **Concession Audit Report**: Breaks down all concessions given during the current account month.
5. **Market Rent Manual Charges**: Gives a breakdown of all manual charges made to Rent, LTOL during the current account month.
6. **Market Rent Vacancy Difference**: Breaks down how charges were applied by unit to the following: market rent, LTOL and GTOL. Shows if there is a difference between what was charged and what is market rent.
8. **Pending Future Transactions**: Gives a list of all upcoming pending transactions.
9. **Security Deposit Detail**: Unit list of all refundable deposits; compares refundable deposits to deposits required.
10. **Transaction Detail Monthly**: Breakdown the Transaction Summary report by every individual transaction that has taken place during the current accounting period. All transactions include all payments and charges by mnemonic code and unit number.
11. **Transaction Summary Report by Month**: Calculates EGI by mnemonic code totals. Shows both charges and losses for the month by GL account code.

**Unit**

REPORTS > UNIT

1. **Actual Rents vs. Market Rent Detail**: Gives a list of all residents showing actual rents, vs. market rents. Report also lists move in date, lease begin and end date and deposit amount.
2. **Hot Sheet**: Shows a list of all make ready units available for rent. Users can add rent specials and move in specials to the hot sheet by going to Unit Maintenance > Edit Unit.
3. **Market and Actual Rents by Unit Type**: Breaks down each floor plan type by market rent, square footage, actual rent and loss to lease. Report also gives a snap shot of the properties performance / current statistics.
4. **No Rent Billed Report**: Gives a list of all units who were not billed rent during the current accounting period.
5. **Rent Roll Detail**: Provides a detailed list of each individual monthly billing charge by unit number for the current accounting period.
6. **Rent Roll Summary**: Provides a monthly billing total (not broken down) for each unit number for the current accounting period.
Work Orders
REPORTS > Work Orders

1. **Work Order Report**: Provides a list of ALL, PENDING or COMPLETED work orders at your property, with specific date ranges.

Misc. Property Reports
REPORTS > MISC. PROPERTY REPORTS

1. **Activity**: Provides a list of resident activity for a specific date range including; occupied on-notice, vacant un-rented, vacant rented, on-notice un-rented, on-notice rented, move-ins and move-outs, canceled leases, residents who have given notice and who have gone month-to-month.

2. **AMC AME Audit**: Provides Accounting Audit information by date range

3. **Availability Board**: Provides a breakdown by unit type of available apartments and pre-leased apartment information

4. **Available Parking**: Provides a list of all open parking, on-notice parking and assigned parking

5. **Birthdays**: Resident birthday list for all residents whose profile/additional information has been entered into AIM

6. **Delinquency by Charge Code**: Aging delinquency report by mnemonic code. Breakdowns each resident’s total delinquency charges by each GL/mnemonic

7. **Expiring Leases**: Provides a list by specific date range for all leases expiring by month. Also provides a graph/calendar showing total expirations by month 1-24 months out.

8. **Lease Renewal Summary by Unit**: Provides a list by date range showing all leases expiring and the outcome of the lease (renewed, month to month, on-notice) Also breaks down the new lease terms, new rental rate compared to the market rent and old rental rate.

9. **Leasing Activity Summary**: Provides a list of all traffic and leasing activity by date range.

10. **New Leases/Renewed Leases**: Report breaks down either new leasing activity or renewal activity or both by date range. Report includes comparing former rental rates to new rental rates and market rent. Provide new lease dates and give a renewal summary for the month

11. **NSF Reconciliation**: Lists all NSF checks by date range or NSF variances (checks that have bounced vs. NSF checks replaced)

12. **Reasons for Move Out**: Breaks down all move-outs or cancellations by date ranges. Report lists by unit; days occupied, reason for moving, NSF and late totals, lease expiration date, rental rate and market rent.

13. **Renters Insurance Expiring**: Provides a list of expiring non-preferred insurance policies and expiration dates

14. **Renters Insurance Information**: Provides a list of all non-preferred insurance policies

15. **Transaction by Charge/Payment Code**: Provides a breakdown by date range of specific GL/mnemonic codes (Transaction Codes). List will show all transactions and negative transactions made to that specific code during the date range you specified

16. **WAR Detail**: Provides information on weekly activity

17. **Weekly Leasing Activity Report**: Provides a summary of all property activity over a one week period.

18. **Weekly Status Report**: Provides weekly activity information for reporting purposes
Weekly Reports
REPORTS > WEEKLY REPORTS

All reports that you would need to complete the AMC Monday morning (required) reports are listed in Weekly Reports to help you. There may be additional reports that you will not need, depending on your owner and what reports you are required to complete every week. All of these reports are in other sections of AIM; they are just complied here for your convenience when completing weekly reports.

1. Availability Board
2. Bank Deposit Summary
3. Delinquency by Charge Code
4. Expiring Leases
5. Traffic Report
6. Transaction Summary Report by Month
7. Weekly Leasing Activity Report

Month End Reports
REPORTS > MONTH END REPORTS

All reports that you will need to use when completing month end are listed in Month End Reports. All of these reports are in other sections of AIM, they are just complied here for your convenience when completing month end. You will use some of these reports when preparing to complete month end and determining if all work is complete. You will use some of these reports to print and compare numbers during the month end process and you will use some of these reports to save in my documents and email to your accountant when the month end process is complete.

1. Aging Delinquency
2. Aging Delinquency Comprehensive
3. Availability Board
4. Bank Deposit Summary
5. Delinquency by Charge Code
6. Expiring Leases
7. Lease Renewal Summary by Unit
8. Leasing Activity Summary
9. Market and Actual Rents by Unit Type
10. Move in Report
11. Move Out by Date Range/Reason
12. New Leases/Renewed Leases
13. NSF Reconciliation
14. Reasons for Move Out
15. Rent Roll Detail
16. Security Deposit Detail
17. Summary of Resident Balances
18. Transaction Detail Report
19. Transaction Summary Report by Month
20. Weekly Leasing Activity Report
21. Work Order Report

All Reports
REPORTS > ALL REPORTS

If you are unsure of where to locate a report / which section the report falls under, use ALL REPORTS. AIM lists every report available in the system under ALL REPORTS.

Reports Legend
REPORTS > REPORTS LEGEND

Provides a breakdown of all reports in AIM and compares them to other operating system reports. This is helpful when first transitioning to AIM until you become familiar with the report names in AIM.

Chapter 12

Mail Merge Letters / Bulk Letters

Mail Merge Letters
RESIDENTS > RESIDENT DATA UPDATE > select the resident you would like to send a letter to > MAIL MERGE LETTERS > NEW. A drop down of all letters available in AIM will appear. Select the letter you wish to send and click PREVIEW. A draft of the letter will pull up to the left of your screen and you will have the option to make changes to the letter. Once the letter looks the way you would like it to, click GENERATE LETTER.

Correspondence also has a BLANK letter in the drop down which you can use to type any letter to the resident you wish. The blank letter has a shell which will include the resident name and address.

You can’t add letters or change letters at this time in AIM, the only changes that will save are to individual residents you send the generated letter to.

Any correspondence you send to residents will save and be available to view or print at any time in the future. To view previous correspondence sent, go to RESIDENT > RESIDENT DATA UPDATE > select the resident and click MAIL MERGE LETTERS. All previous letters generated to this resident will be listed with date of when the letter was sent. To view the specifics of any letter previously sent select the letter and a copy of it will pull up on your computer screen.
Bulk Letters
RESIDENTS > RESIDENT CORRESPONDENCES > select the type of letter you would like to send. If you are sending a 3-day notice, all residents with a $100.00 balance owing will pull up. If you are sending a generic letter, all residents will pull up. Select the resident you wish to send the letter to. You will have the opportunity to change the letter as needed (if they were originally PDF’s letters to begin with), once you have the letter perfect, click GENERATE LETTER. A preview of the letter will pull up in a PDF Format which will allow to make changes; however if you make changes directly on the PDF, it will not save it in AIM.

Chapter 13
Month End Procedures
See MonthEnd Procedures under Help Documentation.

Chapter 14
Monthly Billing
See Autobill Procedures under Help Documentation.

Chapter 15
UB West Import
See UBWest Import under Help Documentation

Chapter 16
Help Documentation
Help Documentation Listed in AIM

Several different help guides are listed here to walk you through the steps of how to operate AIM. You can view the guides while on AIM or you have the ability to print each of the guides out individually. The following guides are available in the help section of AIM:

1. USER GUIDE: All information on out to operate AIM is listed in the User Guide, however different sections have been taken out of the user guide to use separately and are listed below.
2. AUTOBILL PROCEDURES: Step by step procedures on how to complete monthly billing after month end is completed.
3. MONTH END: Step by step procedures on how to complete month end.
4. SODA: Step by step procedures on how to complete a Statement of Deposit Account after someone has moved out and you need to refund or apply the deposit to resident charges. Guide also shows you how to bring the residents account to a zero balance.
5. HOW TO ADD A CHARGE TO A SODA: Tips on how to add charges to a completed SODA.
6. HOW TO REMOVE A CHARGE FROM A SODA: Tips on how to remove charges on a complete SODA.
7. UB WEST IMPORT: Step by step procedures on how to import your UB West charges each month.
8. AIM ENHANCEMENTS: Information on new items added to AIM each month.
9. NEW TRANSFER PROCESS: Procedures on how to transfer a current resident in AIM.
10. SKIP / EVICTION STATUS: Information on pending residents who have skipped or been evicted from another AMC property and how to review the information.
11. PAYLEASE SIGN UP: Instructions on how to set up residents for on-line rental payments.
12. PAYLEASE TRAINING: Instructions on the on-line payment program for residents.
13. COMMON PROBLEMS AND ANSWERS: Updated list on common problems happening in AIM. Guide also gives feedback on how to handle or fix common problems in AIM.
14. FEEDBACK / HELP TICKETS: A direct link to the AMC intranet, where you can submit a help desk ticket. There are two help desks listed on the intranet, make sure to choose the AIM Help Desk and follow these steps to complete a ticket.

Submitting A Help Desk Ticket

When you have a problem in AIM, your first line of defense is to refer to the information in the Help Documentation of AIM. After reviewing the information and you still can’t figure out your next step, contact your RPM for assistance. If your RPM is unable to assist you; your last resort should be to submit a Help Desk Ticket.

www.amcllc.net > sign in with user name and password > AIM HELP DESK > OPEN A TICKET

1. CONTACT NAME: Enter in your name.
2. PHONE: Enter in your property phone number; this is for the web development team to call you if they have questions regarding your ticket.
3. SELECT PRIORITY: Either LOW, NORMAL or URGENT depending on the need of your ticket.
4. SELECT CATEGORY: Enter in a category from the drop down menu.
5. **NOTES**: make sure to be very specific when identifying the problem. Give residents names, apartment number and details about the problem. It will be easier to have the problem corrected with more information.

6. Click **SUBMIT TICKET** to save request