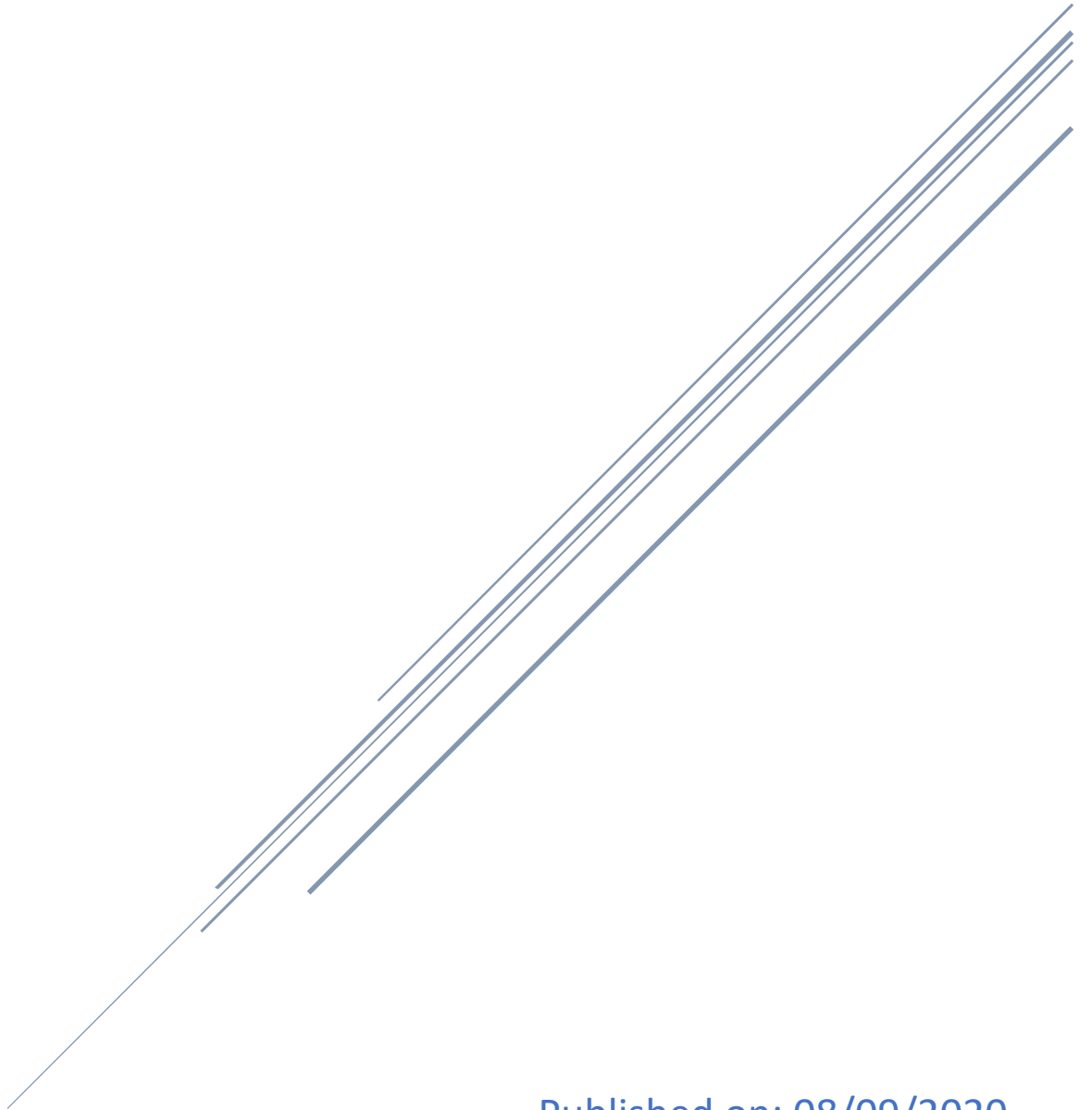


CIC SYSTEM INSTRUCTIONS

For Salon Concierge



Published on: 08/09/2020

Luis Moreno

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CIC System Instructions



1. Go to Tenants and find the tenant and click on the Tenant menu icon (1) icon and a drop down menu will appear. Then click on the Move Out Options. 22
2. If the tenant is leasing multiple suite, select the suite the tenant is moving out of. Enter the move out date (it can a future date). Ensure the “Stop all charges” is selected. Click on the “Move Tenant Out” button. 22
3. Stop all payments scheduled for the Tenant. 23

CIC System Instructions

Assigning a Tenant to an **empty** Suite:

To add new tenant you will need to start at the “Properties” tab.

Step 1: Click on “Place New Tenant” in the appropriate suite.

See below.

SUMMARY			PROPERTIES			TENANTS			ACCOUNTS			REPORTS			SETTINGS		
Property			Tenant			Balance											
 Providence Square - Salons by JC						0.00											
Providence Square - Salons by JC Charlotte, NC 28270 Salons by JC • 38 unit property																	
Suite 1 Salons by JC • 110 sqft			Vacant Place New Tenant			0.00											
Suite 2 Salons by JC • 96 sqft			Vacant Place New Tenant			0.00											
Suite 3 Salons by JC • 153 sqft			Vacant Place New Tenant			0.00											
Suite 4 Salons by JC • 111 sqft			Vacant Place New Tenant			0.00											

CIC System Instructions

Step 2: (Option 1: Enter New Tenant):

Note that you only use this option if you have never created this tenant before. **If this tenant has already been entered into the system (for example – transferring to a new suite), then use Step 2 (Option 2: Use Existing Tenant).** If you end up adding a duplicate tenant, then you will have information store in different records. It is not possible to combine the different records afterwards. Avoid a mess and choose correctly.

Properties : Place New Tenant [Providence Square - Salons by JC, Suite 3]

Tenant Information

Place Tenant

☒ Enter New Tenant ☐ Use Existing Tenant

Company:

Bella G Beauty Studio

First Name / MI

Gabriella

Last Name:

Caroll

Rental Information

Rental Frequency:

Weekly

Rental Amount:

422.00

Security Deposit:

422.00

Additional Deposit:

0.00

Grace Period (days):

1

Create Invoice Early (days):

4

Pro-rate first month:

☐ ?

Move-in Date:

02/24/2020

Begin Charges On:

02/24/2020

Lease-end Date:

07/27/2020

Automatic Rent Escalation

☐ Enable Automatic Rent Escalation

- Enter the new tenant information
 1. Company – optional
 2. First and Last Name – required
- Enter Rental Information
 1. **Rental Frequency – VERY IMPORTANT – change to Weekly**
 2. Rental Amount and Security Deposit – check the defaulted amounts and make adjustments as needed
 3. Additional Deposit – enter a value if needed
 4. Grace Period should default to 1
 5. Create Invoice Early should default to 4
 6. Uncheck Pro-rate first month
 7. Move-in Date – enter the planned move in date. The move in date should be a Monday date. *You cannot enter a move in date in the past.*
 8. Begin-Charges On – enter the first week the person will start working on. In most cases this should be match the Move-In Date.
 9. Lease-End Date – enter the first week of their renewal date anniversary. This must be a Monday date

CIC System Instructions

Step 2: (Option 2: Use Existing Tenant):

A few scenarios to use this option are:

- Tenant is leasing more than one suite, and this is not the first suite you are adding them to
- Tenant is transferring from one suite to another

Properties : Place New Tenant [South Park - Salons by JC, Suite 1]

Tenant Information Place Tenant

☐ Enter New Tenant ☒ Use Existing Tenant **1**

Choose an existing tenant **2**

Ya
Musaelyan, Yana 704-408-2916
Kiker Goyak, Beth 704 661-5175

Rental Frequency: Weekly **3**
Rental Amount: 373.00 **4**
Security Deposit: 362.00 **5**
Additional Deposit: 0.00
Grace Period (days): 1 **6**
Create Invoice Early (days): 4

Pro-rate first month: ☒ **7**
Move-in Date: 08/09/2020 **8**
Begin Charges On: 08/09/2020 **9**
Lease-end Date: **10**

Automatic Rent Escalation

☐ Enable Automatic Rent Escalation **11**

Cancel Place Tenant **12**

- Verify and Adjust Rental Information
 1. Select the "Use Existing Tenant" option. The "Choose an existing tenant" will appear.
 2. Find the existing tenant. Type a few digits of the tenant's name to narrow down the list. Scroll through the options and select the correct tenant.
 3. **Rental Frequency – VERY IMPORTANT – make sure it is set to Weekly**
 4. Rental Amount– check the defaulted amount tenant will pay and adjust as needed. **This amount is ONLY for the suite the tenant is being assigned to.**
 5. Security Deposit – check the defaulted amount tenant paid and adjust as needed. **This amount is ONLY for the suite the tenant is being assigned to.**
 6. Check the next three fields: a) Additional Deposit – enter a value if needed. b) Grace Period should default to 1. c) Create Invoice Early should default to 4
 7. **Uncheck Pro-rate first month**
 8. Move-in Date – enter the planned move in date. The move in date should be a Monday date. *You cannot enter a move-in date in the past. Enter the dates before they move in.*
 9. Begin-Charges On – enter the first week the person will start working on. ALL WEEKS START ON A **MONDAY**. In many cases this should match the Move-In Date.
 10. Lease-End Date – enter the first week of their renewal date anniversary. This must be a Monday date. Not entering the dates correctly upfront will cause rework later on.
 11. Click on Enable Automatic Rent Escalation and enter information. Refer to other areas of the instructions if you need help.
 12. CHECK YOUR WORK and then click on Place Tenant.

Step 3: Enter Automatic Rent Escalation information

Click on the “Enable Automatic Rent Escalation” box and additional fields will appear as shown below:

Automatic Rent Escalation

☒ Enable Automatic Rent Escalation

When should rent be increased? ?



How much should the rent be increased? ?

How often should rent be increased? ?

Every

For how long should rent be increased? ?

- When should rent be increased: It should be match the “Lease End Date”. Remember the date must always be a Monday.
- How much should the rent be increased? Enter the percentage. For tenants that started before 2020, the default is 1.5%. For tenants that started on or after 2020, the default is 2.0%. It is possible that we have agreed to a different rate.
- How often should rent be increased? Every **12 months**
- For how long should rent be increased? **1200 months**

NOTE: The system will compute the new rent rate starting at the date you entered above. At the time of this instruction, the system does not round it to the nearest dollar. The system will give you a message in the SUMMARY tab that the tenant’s lease is expiring, which will match when the escalation occurs. You will need to manually adjust the rent to the nearest dollar on the week before the escalation occurs. You might have to reset up the escalation date.

- Click on **Place Tenant**

CIC System Instructions

Step 4: Enter the additional tenant details

CIC Total will serve as the place to store their personal information.

Tenant Details Save Changes

Company

Bella G Beauty Studio

First Name / MI

Gabriella

Last Name

Caroll

DOB

5/1/1990

SSN

License

C12345

Employer

Private Notes

Notes here will not be visible to anyone except management

Contact Info

Email Notifications ?

☒

Email Address ?

bellag@bellag.com

Home Phone

Mobile Phone

704-123-4567

Work Phone

Mailing Address ?

123 Gabby's House
Charlotte NC 28226

Tenant Portal

Enable Portal ?

☒

Password ?

- encrypted -

Log In as Tenant**Accounting Defaults**

Rent Charge

\$422.00

Create Invoice ?

4 days before due

Grace Period (days) ?

1

Late Fees

Disabled

Other Info

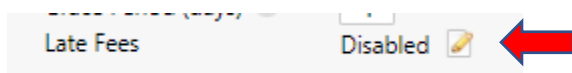
Additional Occupants

CIC System Instructions

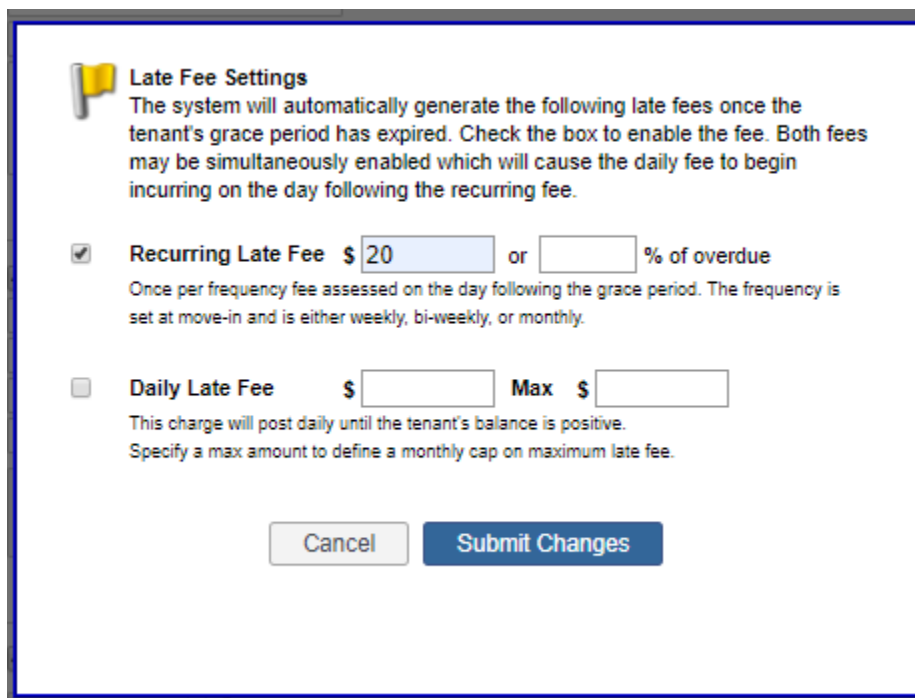
The following information is required:

- Date of Birth (Month and Day only – you can default year to 1990 if the year is a concern or issue)
- License
- Email Notifications (check it)
- Email Address
- Mobile Phone
- Mailing Address
- Enable Portal
- Password – default it to Suitexx (Suite4 for example)
- Rent Charge should default in correctly but double check
- Create Invoice and Grace Period should default to 4 and 1, respectively.

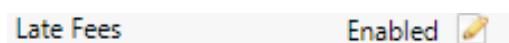
Enable **Late Fees** clicking the paper with the pencil next to it



The following screen will pop and enter the information as shown below:

A screenshot of a 'Late Fee Settings' dialog box. It has a yellow flag icon on the left. The title is 'Late Fee Settings'. Below the title is a paragraph: 'The system will automatically generate the following late fees once the tenant's grace period has expired. Check the box to enable the fee. Both fees may be simultaneously enabled which will cause the daily fee to begin incurring on the day following the recurring fee.' There are two options: 'Recurring Late Fee' with a checked checkbox, a text input field containing '20', and a label '% of overdue'; and 'Daily Late Fee' with an unchecked checkbox, a text input field, and a 'Max \$' label with another text input field. Below these is a paragraph: 'Once per frequency fee assessed on the day following the grace period. The frequency is set at move-in and is either weekly, bi-weekly, or monthly.' and 'This charge will post daily until the tenant's balance is positive. Specify a max amount to define a monthly cap on maximum late fee.' At the bottom are two buttons: 'Cancel' and 'Submit Changes'.

The Late Fees are now enabled:

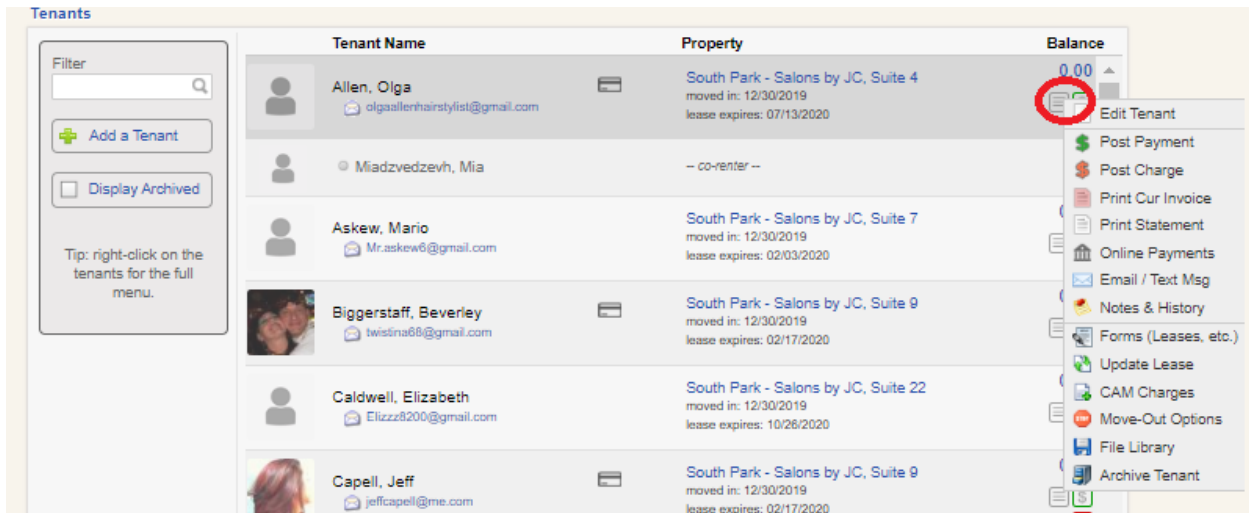


Click on **Save Changes**.

CIC System Instructions

Checking a Tenant's info is complete:

Step 1: Go to the "Tenants" tab and find the Tenant whose information needs to be checked. Then left click on  and a dropdown menu will appear. Click on "Edit Tenant"



Tenants

Filter 

 Add a Tenant

☐ Display Archived

Tip: right-click on the tenants for the full menu.

Tenant Name	Property	Balance
 Allen, Olga olgaaalterhairstylist@gmail.com	South Park - Salons by JC, Suite 4 moved in: 12/30/2019 lease expires: 07/13/2020	0.00 
 Miadzedzevh, Mia -- co-renter --		
 Askew, Mario Mr.askew6@gmail.com	South Park - Salons by JC, Suite 7 moved in: 12/30/2019 lease expires: 02/03/2020	
 Biggerstaff, Beverley twistina68@gmail.com	South Park - Salons by JC, Suite 9 moved in: 12/30/2019 lease expires: 02/17/2020	
 Caldwell, Elizabeth Elizzz8200@gmail.com	South Park - Salons by JC, Suite 22 moved in: 12/30/2019 lease expires: 10/26/2020	
 Capell, Jeff jeffcapell@me.com	South Park - Salons by JC, Suite 9 moved in: 12/30/2019 lease expires: 02/17/2020	

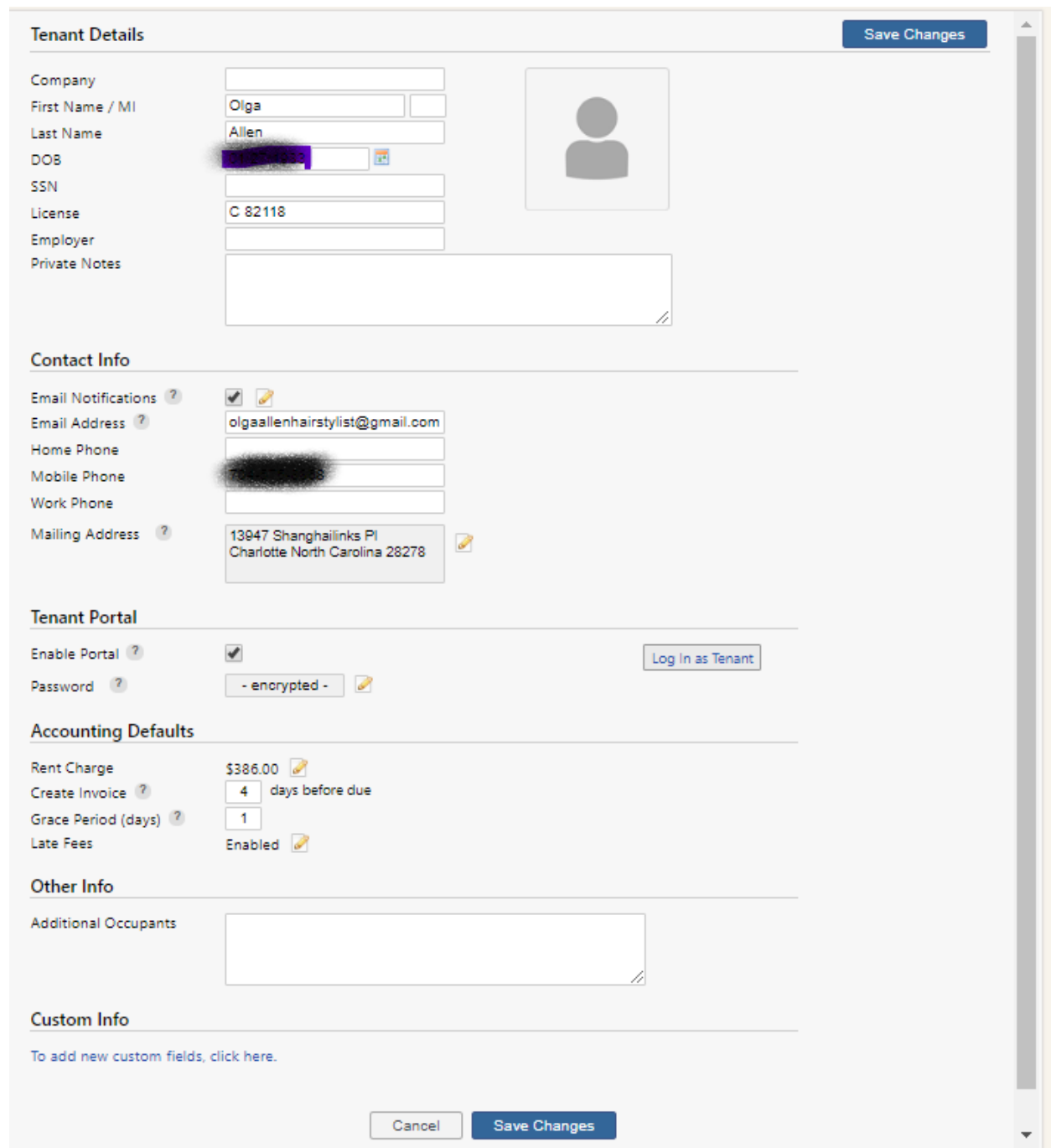
- Edit Tenant
- Post Payment
- Post Charge
- Print Cur Invoice
- Print Statement
- Online Payments
- Email / Text Msg
- Notes & History
- Forms (Leases, etc.)
- Update Lease
- CAM Charges
- Move-Out Options
- File Library
- Archive Tenant

CIC System Instructions

Step 2: Check that all the fields are filed as shown below:

Required fields: First and Last Names, DOB, License, Email Address, Mobile Phone, Mailing Address, Create Invoice, Grace Period

Fields that should be checked or enabled: Email Notifications, Enable Portal, Late Fees



The screenshot displays a web form titled "Tenant Details" with a "Save Changes" button in the top right corner. The form is organized into several sections: "Tenant Details", "Contact Info", "Tenant Portal", "Accounting Defaults", "Other Info", and "Custom Info".

- Tenant Details:** Includes fields for Company, First Name / MI (Olga), Last Name (Allen), DOB (01/01/1993), SSN, License (C 82118), Employer, and Private Notes. A placeholder image for a profile picture is shown on the right.
- Contact Info:** Includes Email Notifications (checked), Email Address (olgaallenhairstylist@gmail.com), Home Phone, Mobile Phone, Work Phone, and Mailing Address (13947 Shanghaillinks Pl, Charlotte North Carolina 28278).
- Tenant Portal:** Includes Enable Portal (checked) and Password (- encrypted -). A "Log In as Tenant" button is located to the right.
- Accounting Defaults:** Includes Rent Charge (\$386.00), Create Invoice (4 days before due), Grace Period (days) (1), and Late Fees (Enabled).
- Other Info:** Includes Additional Occupants.
- Custom Info:** Includes a link to "To add new custom fields, click here."

At the bottom of the form, there are "Cancel" and "Save Changes" buttons.

CIC System Instructions

Step 3: Ensure Late Fees is Enabled

It should look like this:

Late Fees **Enabled** 

If it does not, click on  to enable. The screen below will open. Make changes and ensure it matches the settings as shown in the image below:



Late Fee Settings

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



Recurring Late Fee \$ or % of overdue

Once per frequency fee assessed on the day following the grace period. The frequency is set at move-in and is either weekly, bi-weekly, or monthly.



Daily Late Fee \$ **Max** \$

This charge will post daily until the tenant's balance is positive.

Specify a max amount to define a monthly cap on maximum late fee.

Cancel

Submit Changes

CIC System Instructions

Adjusting or adding ACH information for a Tenant

Step 1a (option 1 – tenant has Online Payments Enabled)

SUMMARY			PROPERTIES			TENANTS			ACCOUNTS			REPORTS			SETTINGS		
Tenant Name						Property						Balance					
			Allen, Olga  olgaallenhairstylist@gmail.com						South Park - Salons by JC, Suite 4 moved in: 12/30/2019 lease expires: 07/13/2020						0.00   		
			Miadzvedzevh, Mia			-- co-renter --											

Click on the credit card circles in Red. If Online Payments is NOT enabled, then the credit card will not be shown.

Step 1b (option 2 – tenant does NOT have Online Payments Enabled)

Tenant Name		Property	Balance
	Allen, Olga  olgaallenhairstylist@gmail.com	 South Park - Salons by JC, Suite 4 moved in: 12/30/2019 lease expires: 07/13/2020	0.00   
	Miadzvedzevh, Mia	-- co-renter --	
	Askew, Mario  Mr.askew6@gmail.com	South Park - Salons by JC, Suite 7 moved in: 12/30/2019 lease expires: 02/03/2020	0.00 
	Biggerstaff, Beverley  twistina68@gmail.com	 South Park - Salons by JC, Suite 9 moved in: 12/30/2019 lease expires: 02/17/2020	
	Caldwell, Elizabeth  Elizzz8200@gmail.com	South Park - Salons by JC, Suite 22 moved in: 12/30/2019 lease expires: 10/26/2020	
	Capell, Jeff  jeffcapell@me.com	 South Park - Salons by JC, Suite 9 moved in: 12/30/2019 lease expires: 02/17/2020	
	Carver, Gina  ginacarver@att.net	 South Park - Salons by JC, Suite 23 moved in: 12/30/2019 lease expires: 12/28/2020	
	Connor, Dennis	South Park - Salons by JC, Suite 29	0.00

 Edit Tenant
 Post Payment
 Post Charge
 Print Cur Invoice
 Print Statement
 Online Payments
 Email / Text Msg
 Notes & History
 Forms (Leases, etc.)
 Update Lease
 CAM Charges
 Move-Out Options
 File Library
 Archive Tenant

Left Click on  and a menu will appear. Select "Online Payments" as shown above.

CIC System Instructions

Step 2 – Manage Online Payments and Add / Adjust ACH information

Tenants : Online Payments [Olga Allen]

Edit Online Payments Save Changes

Manage Payment Accounts 1

Tenant ACH Fee ? 0.00

Payment Policy ? Allow Any ▼

Changelog 5 Changes

Online Payments Enabled ? ☒ Yes ☐ No

ACH Payments Enabled ? ☒ Yes ☐ No

ACH Tenant Entry ? ☒ Yes ☐ No

Recent Errors ? 0 Errors

Set up Recurring Transactions (MultiPay)
A recurring transaction will begin on the date specified and continue each period, until disabled.
MultiPay Enabled ☒
Amount 386.00
From This Account CHECKING xxxxxxxxxx2820
MultiPay Begin 12/26/2019
Frequency Weekly ▼
Interval Day ? Thursday ▼

Set up One-Time Transaction (SinglePay)
A single transaction will occur once on the date specified below.
SinglePay Enabled ☐
Amount 0.00
From This Account CHECKING xxxxxxxxxx2820
Transaction Date 01/31/2020

Cancel Save Changes

Click on “Manage Payment Accounts” to update or add a new bank or credit card account. The window below will open up.

NOTE: You can have more than one account set up. The tenants have the ability to add, update and delete accounts.

Tenants : Online Payments [Olga Allen] : Manage Payment Accounts

Manage Payment Accounts

xxxxxxxxxx2820 SUNTRUST ✓ Primary Remove

Add Credit / Debit Card Add Bank Account Return to Tenant

In this window you can select to Add a Credit/Debit Card or a Bank Account. You can also Remove an account and change which account will be the Primary account to pay charges.

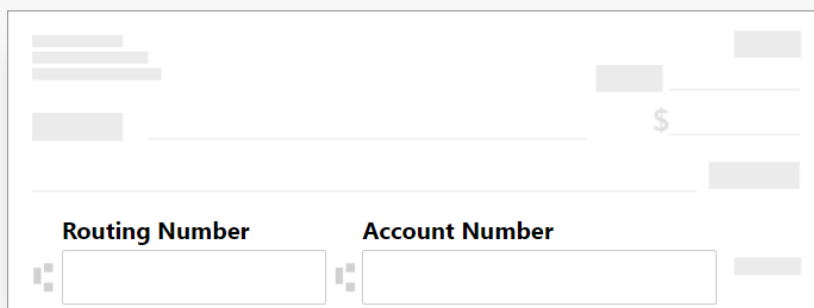
Click on the appropriate button to add an account:

CIC System Instructions

Tenants : EasyPay [Olga Allen] : Add Bank Account

Add Bank Account

Please enter the tenant's bank-account information below. The routing and account numbers can be found at the bottom of the tenant's checks.

A form for entering bank account information. It includes fields for the bank name, address, city, state, and zip code. There are also fields for the routing number and account number, each with a small icon to its left. A dollar sign is placed between the address and the account number field.

Add Account

Back

Carefully enter the Routing Numbers and Account Numbers

OR

Tenants : EasyPay [Olga Allen] : Add Credit or Debit Card

Add Credit or Debit Card

Card Number

Expires on MM / YY

CVV

Billing Zip Code

Add Payment Card

Back



Your payment data is secure. All payment data is encrypted and securely transmitted using bank-grade encryption.

Carefully Enter the required information to add a Credit Card or Debit Card

CIC System Instructions

Step 3 – Manage Online Payments and Set up recurring payments

Edit Online Payments

Save Changes

Manage Payment Accounts 0

Tenant ACH Fee ?
Payment Policy ? Allow Any
Changelog 0 Changes

Online Payments Enabled ? Yes No
ACH Payments Enabled ? Yes No
ACH Tenant Entry ? Yes No
Recent Errors ? 0 Errors

Set up Recurring Transactions (MultiPay)

A recurring transaction will begin on the date specified and continue each period, until disabled.

MultiPay Enabled ☒
Amount 310.00
From This Account - Select an account -
MultiPay Begin 05/25/2020
Frequency Weekly
Interval Day ? Thursday

Set up One-Time Transaction (SinglePay)

A single transaction will occur once on the date specified below.

SinglePay Enabled ☐
Amount 0.00
From This Account - Select an account -
Transaction Date 01/31/2020

Under “Set Up Recurring Transactions (MultiPay), do the following:

1. Check the box in MultiPay Enabled. This will allow you to edit the other fields.
2. Enter the Amount to be paid weekly
3. Select the “From This Account” the account that will be used to pay the recurring payment.
4. Enter the MultiPay Begin date. Enter a Monday date.
5. Select WEEKLY as the Frequency. **This is very important.**
6. Select “Thursday” as the Interval Day. **This is very important.**
7. Click Save Changes.

CIC System Instructions

Adding an additional tenant to a suite (sharing situation)

Option 2 (Keep Separate): The additional tenant will pay a portion of the rent directly to Salons by JC

Step 1: Go to the properties tab and left click on the "Property Menu" for the suite that needs to have a new tenant placed. In the menu that appears, select "Place New Tenant"

The screenshot shows the Salons by JC software interface. At the top is a navigation bar with tabs: SUMMARY, PROPERTIES (selected), TENANTS, ACCOUNTS, REPORTS, and SETTINGS. Below the navigation bar is a table with two columns: 'Property' and 'Tenant'. The table lists seven suites (Suite 8 through Suite 14). Suite 10 is highlighted, and a context menu is open over it, showing various actions. The 'Place New Tenant' option is highlighted in blue. At the bottom right of the table, there are some financial indicators: '0.00' and a green/red dollar sign icon.

Property	Tenant
› Suite 8 Salons by JC • 126 sqft	Vacant Scheduled 02/17/2020: <i>Beaucoup</i>
› Suite 9 Salons by JC • 154 sqft	Vacant Scheduled 02/17/2020: <i>Pastiche</i>
› Suite 10 Salons by JC • 107 sqft	Vacant <i>Place New Tenant</i>
› Suite 11 Salons by JC • 113 sqft	Vacant Scheduled 02/17/2020: <i>beni</i>
› Suite 12 Salons by JC • 104 sqft	Vacant Scheduled 02/17/2020: <i>Cucco Capelli Salon</i>
› Suite 13 Salons by JC • 99 sqft	Vacant Scheduled 02/17/2020: <i>Denise Simril Hair</i>
› Suite 14 Salons by JC • 101 sqft	Vacant Scheduled 02/17/2020: <i>Jane Hunter Studio</i>

- Edit Property
- Marketing Info
- Edit Location
- Post Income
- Post Expense
- Place New Tenant**
- Management Fees
- Workorders
- Inspections
- Depreciation
- Applications
- Notes & History
- File Library
- Archive Property

0.00
\$ \$

CIC System Instructions

Step 2 – Click on “Keeps Tenants Separate” under Option 2 (located at lower right half of the screen).

Properties : Place New [Carmel Park - Salons by JC, Suite 13]

Our records indicate that this property already has one or more active tenant(s).
How would you like to treat this new tenant?

Option 1 - Group Together Choose this option if you wish this new tenant that you are about to enter to be grouped within the same rent already being charged to Denise Simril Hair. Use this option when the tenants are commonly responsible for the full rent payment. Common scenarios: • Roommates who pool their money and pay rent in one lump sum. • Husband / wife with shared responsibility for rent. • Any group of individuals who have a shared responsibility for the common rent payment. Group Tenants Together	Option 2 - Keep Separate Choose this option if the new tenant is not to be grouped with Denise Simril Hair. Use this option if the tenants are each responsible for separate portions of the rent, and not commonly responsible. Common scenarios: • A new tenant that is replacing a prior tenant that has not yet moved out. • A single address, split into numerous apartments. • Numerous rooms being individually rented within one property. • If each tenant is responsible for only a portion of the total rent. Keep Tenants Separate
---	---

*TIP: If you wish to group an **existing** tenant with Denise Simril Hair, [exit this page](#) and on the tenants tab, right-click an inactive tenant and choose "Add To Group"*

Step 4 – Add the new tenant just like you would a tenant to an empty suite

CIC System Instructions

Recording the Deposit for a tenant

1. Go to Tenants and find the tenant and click on Post Payment icon



SUMMARY PROPERTIES TENANTS ACCOUNTS REPORTS SETTINGS

Tenants

Tenant Name	Property	Balance
 Torrey Duerr torreyduerr@gmail.com	Providence Square-SBJC, Suite 14 moved in: 05/25/2020 lease expires: 05/25/2021	0.00 

2. Adjust the following fields as necessary
 1. Date
 2. Pmt Type (use the drop down and select how payment was received)
 3. If it is a check or other – enter the additional information
 4. Change the Category to “100 Security Deposit”
 5. Enter the deposit amount
 6. Note what the deposit was for “suite 14”
 7. Check you work and press “Post Income”

Tenants : Accounting [Torrey Duerr] : Post Payment

Tenant Balance: 0.00

Transaction Details		Accounts ?	
Date 1	05/19/2020	Bank Account	1030 Providence Square - Che ..
Pmt Type 2	Other	Tenant	Torrey Duerr
Check / Ref No. 3	Venmo	Attachment	[add attachment]

Payment Item ?			
Property	Providence Square-SBJC, Suite 1	Category 4	100 Security Deposit
Memo	suite 14 6	Amount 5	308.00

Add Line

Cancel Post Income **7**

Next time you look at the Tenant’s Ledger you will see the deposit being adjusted by the amount you entered in the transaction. For example:

Tenants : Accounting [Torrey Duerr]

This Year

Check #	Date	Description	Debit	Credit	Balance	c
		Balance Forward			0.00	
	05/25/2020	Rent	308.00		(308.00)	
		110 Charge 05/25/20 - 05/31/20				
	05/25/2020	Free Week - 5/25/20		308.00	0.00	
		6560 Promo				

CIC System Instructions

Recording a sign fee charged and received for a tenant

When the sign fee payment is received, you will need to post both a Charge (step 1 below) and a Credit (step 2 below). The Charge creates the amount due and the Credit records the payment received.

1. Create a \$20 Expense Line Item to cover the Sign Fee. Go to Tenants and find the tenant and click on Post Expense icon. You will see the screen below:
 1. Enter Date Sign Fee is received
 2. In the Amount field enter the Sign Fee (\$20 is the current fee)
 3. In the Memo Field enter "Sign Fee"
 4. In the Category Field, select "6005 Sign Fees"
 5. Check you work and press "Post Charge"

Tenants : Cole, Neil : Post Expense

Transaction Details		Accounts ?	
Date	06/25/2020 1	Tenant	Cole, Neil
Amount	20.00 2	Category	6005 Sign Fees 4
Memo	Sign Fee 3	Attachment	[add attachment]
Options	☐ Recurring		

2. Create a \$20 Credit to cover the Sign Fee. Go to Tenants and find the tenant and click on Post Credit icon. You will see the screen below:
 1. Enter Date Sign Fee is received
 2. Enter the appropriate "Pmt Type" and "Check/Ref No." as necessary
 3. In the Memo Field enter "Sign Fee"
 4. In the Category Field, select "4420 Sign Fees"
 5. In the Amount field enter the Sign Fee (\$20 is the current fee)
 6. Check you work and press "Post Income"

Transaction Details		Accounts ?	
Date	07/01/2020 1	Bank Account	1020 Checking - South Park
Pmt Type	Check 2	Tenant	Cole, Neil
Check / Ref No.	20	Attachment	[add attachment]

Payment Item ?			
Property	South Park - Salons by JC, Suite 2	Category	4420 Sign Fees 4
Memo	Sign Fee 3	Amount	5

CIC System Instructions

Entering a Free Week:

To enter a Free Week (promotion), you will need to Post a Payment transaction equal to the amount that is given free and change the Category of the payment to “4410 Free Rent”. If the Tenant is on ACH, you will also need *turn off* the ACH payment.

Step 1: Find the Tenant and start the “Post Payment” transaction process

Notes:

- Use the Filter to the left to quickly find the tenant
- Click on the Green Box with the \$

The screenshot shows the Salons by JC system interface. At the top, it says "Logged in as: Luis Moreno" with links for "Need Help" and "Logout". Below the header is a navigation bar with icons and labels for SUMMARY, PROPERTIES, TENANTS, ACCOUNTS, REPORTS, and SETTINGS. The main section is titled "Tenants" and contains a table of tenant information. On the left, there is a filter box with the text "nico" and a search icon, an "Add a Tenant" button, and a "Display Archived" checkbox. A tip at the bottom left says "Tip: right-click on the tenants for the full menu." The table has columns for Tenant Name, Property, and Balance. The first row shows Nicole Paride, South Park - Salons by JC, Suite 21, with a balance of 385.00. A red arrow points to a green box with a dollar sign next to the balance.

Tenant Name	Property	Balance
Paride, Nicole nicoleparide@yahoo.com	South Park - Salons by JC, Suite 21 moved in: 12/30/2019 lease expires: 03/30/2020	385.00

CIC System Instructions

Step 2: Create a Post Payment transaction

1. Date: It must be a **Monday date** representing the week where the Free Rent will be given.
2. Payment Type: Change to "Other"
3. Memo: Use the following examples to create a memo: "Free Week for 12/30/19" or "\$100 Rent week for 12/30/19" as appropriate.
4. Category: Change the Category to "4410 Free Rent".
5. Amount: Enter the amount of Free Rent to be given.
 - a. For example a), if one full free week is to be given and the weekly rent is \$385, then enter \$385.
 - b. For example b), the Tenant will be charged only \$100 for the week. Then enter the difference between the weekly rent and \$100. Enter \$285 (= \$385 - \$100).
6. CHECK ALL YOUR WORK. We strive for 100% quality work.
7. Save: Click Save

Tenants : Accounting [Hirsch Nguyen] : Post Payment

Tenant Balance: 0.00

Transaction Details		Accounts ?	
Date	06/29/2020 ¹	Bank Account	1010 Carmel Park - Checking
Pmt Type	Other ²	Tenant	Hirsch Nguyen
Check / Ref No.		Attachment	[add attachment]

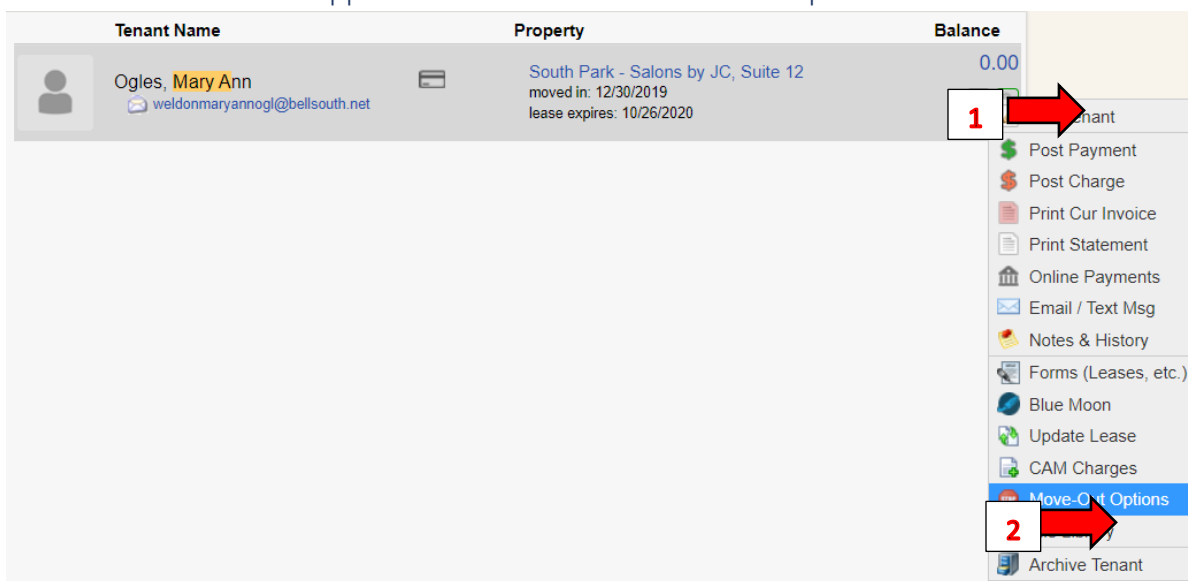
Payment Item ?			
Property	Carmel Park - SBJC, Suite 17 ³	Category	4410 Free Rent ⁴
Memo	Free Week ⁵	Amount	300.00 ⁵
Add Line			

[Cancel](#) [Post Income](#) ^{6 & 7}

CIC System Instructions

Moving out a Tenant from the salon

1. Go to Tenants and find the tenant and click on the Tenant menu icon (1) icon and a drop down menu will appear. Then click on the Move Out Options.



2. If the tenant is leasing multiple suite, select the suite the tenant is moving out of. Enter the move out date (it can a future date). Ensure the "Stop all charges" is selected. Click on the "Move Tenant Out" button.

Tenants : Move Out [Mary Ann Ogles]

Schedule Move-out

This action will move the tenant out of the property. To add a lease expiration date instead, [click here](#)

Tenant: Mary Ann Ogles

Property: South Park - Salons by JC, Suite 12 (moved-ir ▼)

Move-Out Date: 07/04/2020

Stop All Charges: ☒ ?

Notes

Any recurring transactions (usually rent invoicing) associated with this tenant & property will be disabled following the move-out date you specify. If the date is specified in the future, any recurring transactions up until that date will proceed. If a past date is specified, you may need to adjust accounting for tenant manually. If Automatic Rent Escalation is enabled it will be disabled immediately for this property. If Cash Payments are enabled, they will be disabled immediately for this renter.

3. Stop all payments scheduled for the Tenant.

The next step is especially important to stop automatic payments by the tenant. The previous step only stopped the charges. Go to Tenant >> Payments and disable all future recurring and one time payments that are scheduled after the Move Out Date.