

Checking Your Data After a Conversion

09/17/02

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After running a conversion or receiving your data from a conversion, you must check the information that has been transferred over before you continue the Setup process.

****DO NOT GO INTO SITELINK UNTIL ALL INFORMATION ON THE SETUP CHECKLIST HAS BEEN ENTERED!**

****DO NOT MAKE A DAILY CLOSE UNTIL ALL INFORMATION HAS BEEN CHECKED! ONCE A DAILY CLOSE IS MADE, IT IS IMPOSSIBLE TO EDIT CHARGES AND PAYMENTS.**

Tenant List:

1. Check all required information fields (names, area codes, addresses, etc.) for missing information or incorrect information.
2. Make sure there are no tenants in the list more than once.

Unit List:

1. Check all required information fields (unit nos., sizes, etc.) for missing information or incorrect information.
2. Make sure there are no missing units.

If your conversion included ledger information:

Ledger:

1. Check for tenants in wrong units.
2. Check the following on the Batch Put Tenants in Units screen:
 - a. Lease date
 - b. 1st unpaid rent
 - c. Rental rate
 - d. Security deposit
 - e. Other balance
 - f. Prepaid
 - g. Credit balance
 - h. Type of billing (First of Month, Anniversary, etc.)

HOW TO CHECK:

RUN REPORTS FROM THE SITELINK SETUP CHECKLIST. Specifically, go through every line item on the Rent Roll and Occupancy report.

3. You will also need to set up other tenant information on the Batch Put Tenants in Units screen such as:
 - a. Time zone (for each tenant)
 - b. Keypad (for each tenant)
 - c. Type of tenant (Residential, Commercial)

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*Note: If the conversion is done at SMD, any information you enter into your SiteLink database will be overwritten by the database we send to you with your converted data.