

Setting Up Your SiteLink Program

11/15/02

Page 1 of 1

Before using SiteLink you **MUST** configure your facility using the **Setup SiteLink** program (normally located on your desktop).

Overview of the Setup Procedure

1. Start at the top of the Setup SiteLink checklist and work your way through all of the items. You must configure all options listed on the checklist to use SiteLink appropriately. Start by entering the following:
 - a. Lease type, rent prorating and other program defaults; and tenant address defaults
 - b. Company information, accounting, and bank accounts
 - c. Unit Setup
2. Follow the order of the checklist with one exception: set up the gate controller interface last. All items on the list are critical.
3. Enter the past due schedule and default fees for your facility. Be careful when adding pre-requisite events; they may keep a past due event from appearing on the day you scheduled.
4. If you use the credit card feature make sure you enter the information in SiteLink exactly the way you did in your PC Charge Payment Server software. The credit card feature will not function without complete and matching information
5. In the Bank Account & Accounting section under General Journal & Banking, provide a Bank Name and Account. To use Individual tenant Insurance, contact one of the insurance providers listed and complete the Invoicing and Insurance section. Then, contact SMD for a project # to enable insurance features in Sitelink.
6. If you use email to connect to the Home Office program, please select "None" in the Modem setup.
7. Before putting tenants in units, setup ALL of your units and then enter ALL of your tenant names and addresses (enter same clients only once even if they rent multiple units. If you converted from another software and there still are duplicate tenant records in the Add Customers menu, delete the duplicate accounts so that each tenant is in the list only **ONCE**. If there are tenants with multiple units, they must be moved into each unit). The map is not essential to SiteLink operation. Set up the map last in SiteLink after everything else is verified and running. Visit Set Tenant Defaults and Set Program Defaults. **For individuals who have already paid security deposits:** when setting program defaults, be sure to check the checkbox to automatically credit the security deposit. Crediting a security deposit will show it as paid in SiteLink and appear when vacating clients.
8. **Batch Put Tenants in Units. The following information is critical.**
 - a. Be sure to enter the original Lease Date
 - b. The "1st Unpaid Rent" date field is the start date of the tenant's 1st unpaid rent charge. For example, if a tenant paid his rent through the month of June, enter the "1st Unpaid Rent" charge as July 1. Put differently, enter the date of the tenant's oldest unpaid rent charge.
 - c. Rent charges and late fees from the "1st Unpaid Rent" date to the present are automatically created by SiteLink to bring the account up to date.
 - d. Any change from the standard rent must be entered using the "Unpaid Rent/Rental Rate" button.
 - e. Enter the amount of paid-in security deposit into the "Sec Dep" field. If you have previously set the Ledger Default to automatically credit the security deposit, it will appear as paid in SiteLink.
 - f. You do not need to enter past payments. SiteLink is only concerned with unpaid charges. Outstanding charge balances are entered into the "Other Bal" field.
 - g. Select a tenant for a unit by clicking on the Tenant button. Check if the tenant's name appears more than once on the selection list. Duplicate names should be deleted. SiteLink sees each name as a separate tenant.
 - h. **After putting 2 to 5 tenants into units, run the Ledger History, Rent Roll and Open Charges All Tenants reports to verify the information you have entered so far. Keep checking; do not enter a large group of tenants into units without checking periodically.**
 - i. **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.**
9. Use the Adjust Charges on Ledger to remove or add charges. Credit late fees from this screen. SiteLink automatically generates Late Fees – if you delete them they will reappear the next day you run SiteLink. Remove Late Fees by crediting them.
10. If an account is incorrect, it is better to delete it rather than to make many adjustments. Deleting accounts does not remove tenants or units from the system. It merely reverses the move-in and allows you to start over for the account.
11. Before using SiteLink for your normal operations, run reports to verify all customer information and account balances.

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12. Make frequent backups. Backup your work onto a floppy from the Company button: Backup screen in SiteLink. **Do not use the SiteLink Move-In screen to setup this program for existing tenants; work in Setup SiteLink only.**