



# MakeReady Manager<sup>®</sup>

**CREATED BY PROPERTY MANAGERS**

**FOR PROPERTY MANAGERS**

A software solution that helps streamline the rental unit turn-over process.

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# Understanding the Terms in Make Ready Manager®

Unit List Window	A customizable window that lists all the units you manage. You can filter, sort, display and print information about your units in this window for easy data evaluation. This is the window you will use to determine which apartment should be added to your Make Ready Board.
Make Ready Board	A customizable window that displays all the units you have added to your Make Ready process. The board will display the status of each task assigned and other pertinent information you need to know about your unit and its progress in its Make Ready process.
Task Assignment Window	A window that contains information on a particular unit and displays the tasks associated with that unit. In this window you can remove or add tasks as necessary to Make Ready that unit. You can assign a worker to the task and generate dates for when the task needs to be done and when it was completed. You can add task notes which can be displayed on reports.
Make Ready Tasks	Make Ready Tasks are tasks that you must do to make a rental unit ready. You may set up general terms (ie. Maintenance) or specific (ie. Window replacement) to identify what needs to be done.
Default Tasks	Tasks that you generally do for each apartment you Make Ready. These tasks will be listed in your assignment window each time you add a unit to your Make Ready board. You can add tasks to your defaulted tasks or you can remove a defaulted task when it is not needed.
Other Tasks	Tasks that you do not generally do for each apartment you turn over but are necessary to make a specific unit ready. These tasks can be added to the task assignment window for that unit as deemed necessary. (ie carpet replacement, window repair, extermination)
Task History	Task history that is generated on a unit from when it was previously in the Make Ready process and includes completed tasks if currently in the Make Ready process.
Worker List	A customizable window that lists all the workers you have set up. You can filter, sort, display and print information about your workers. You can add or delete workers. We advise you to make workers inactive instead of deleting workers you have used in the past so you can keep the task assignment history on them.
Worker	Workers are your employees, vendors, or contracted companies who provide a service or perform any work done during your turns
Worker Skills	Individualized skills that a worker may possess. You can search for workers with a specific skill.

# Understanding the Terms in Make Ready Manager®

(cont.)

Lease Expiration Date	The date of your current tenant's lease expiration. If you have the import/integration capability, this date will be imported into Make Ready Manager from your management program.
Expected Vacate Date	This is when you expect the apartment to be vacated. It is defaulted as the unit's lease expiration date but you can change this date if you expect the tenant to be out anytime other than when the lease expires. This is very helpful in cases of evictions and early terminations. This is the date that should prompt your Make Ready process since you are expecting the unit to be vacated.
Actual Vacate Date	This is the most recent past tenant's move out date from the unit. If you have the import/integration capability, this date will be imported into Make Ready Manager from your management program. We encourage that you do not enter an actual vacate date or move out date into your program until you know the tenant has moved out.
Task Colors	This is the most recent past tenant's move out date from the unit. If you have the import/integration capability, this date will be imported into Make Ready Manager from your management program. We encourage that you do not enter an actual vacate date or move out date into your program until you know the tenant has moved out.
Task Status	The status of the task which will be displayed on the Make Ready Board. The statuses are 1 of 3 categories: Unassigned, Assigned and Completed.
Customize	You can customize your Unit List window, Make Ready Board, Worker Window and Task Reports to display the fields you want in the order you would like to see them.

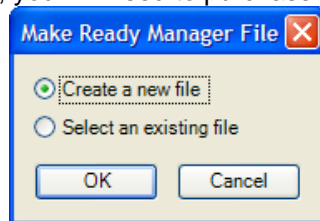
# Setting Up Make Ready Manager®

Make Ready Manager was specifically developed to help schedule and organize the turn-over process of rental units. You will find Make Ready Manager easy to use and an essential tool for your turn-over work. Your vendors and workers will appreciate the organization of their assignments, and you will appreciate having their assignments at your finger tips.

We suggest that you follow our setup process below to ensure that you set up your Make Ready Manager most efficiently.

- 1) We encourage you to become familiar with the sample data in Make Ready Manager before you enter the registration key because once you enter your registration key and create a new database file for your rental information, it is not easy to go back to the sample data.
- 2) You may enter the registration key in the Product Registration Box when you download the Fully Functional Sample from [www.makereadymanager.com](http://www.makereadymanager.com) or find the Product Registration Box under the HELP menu in the Make Ready Manager program.

Once the license key is entered you can change from the sample database and create a database for your units. From the main screen in Make Ready Manager, click on Setup and then Change Database. Since you are just getting started, click on Create a New File. You can save the new blank database file on your computer or on a network file share so that Make Ready Manager can be used by other computers on your local network. There is no limit to the number of users at your office location. If you have another office location, you will need to purchase another license to the program.



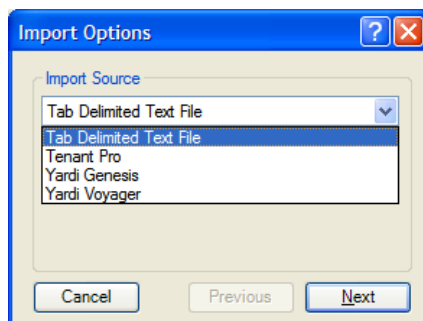
You can use Make Ready Manager with multiple database files if you want to divide the units you manage into separate systems.

When setting up your network so more than one computer can use Make Ready Manager at the same time, you should click Select an Existing File option which allows you to select the Make Ready Manager database file that you have saved in your network file share.

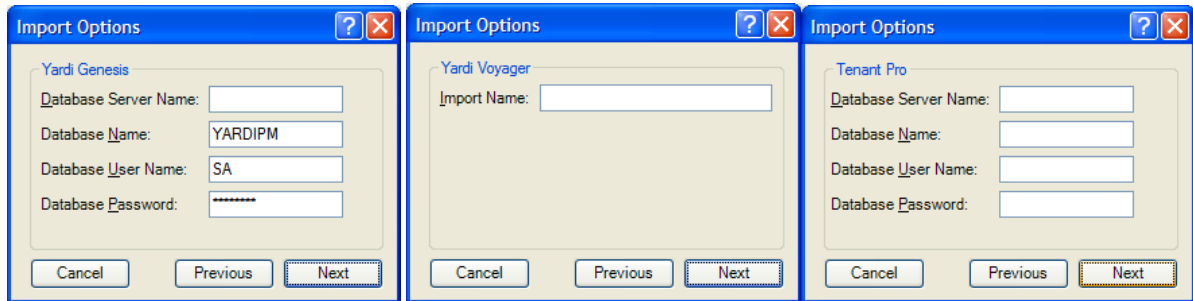
- 3) Import/Integration with select software programs:

Make Ready Manager has developed a specific software integration feature for Yardi Genesis, Yardi Voyager, Tenant Pro 7, & Property Manager Edge. We have the ability to automatic import unit information from these management programs directly into Make Ready Manager on a regular basis without any extra steps. More integrations will be added as the need increases.

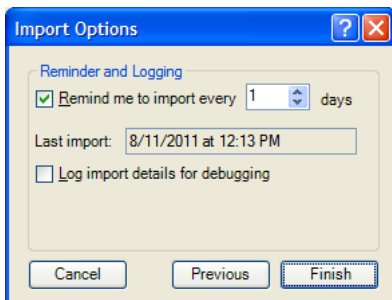
Go to Setup and then Import Options. Select the software program you use.



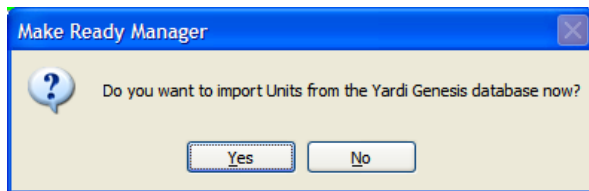
The next window will be one of the following depending on your software program. Enter the correct database values in the fields displayed. You can usually get this information from whomever setup the Microsoft SQL Server database with your property management system or from the vendor of your property management system. Contact Key Rental Solutions' technical support if you need assistance or if you use Property Manager Edge.



The next screen is for selecting the frequency of your imports. We recommend you have Make Ready Manager import your unit information on a daily basis so you have current lease expiration and move in dates. By importing daily, Make Ready Manager will ask you when you start up the program if you want to import your unit information from your property management software so you can keep your unit information in Make Ready Manager updated with your software. Check the box "Log import details for debugging" if requested by Key Rental Solutions technical support staff.



Click Finish and you will be prompted to import your units from your specific software program.



❑ 4) Import Your Unit Information by other means:

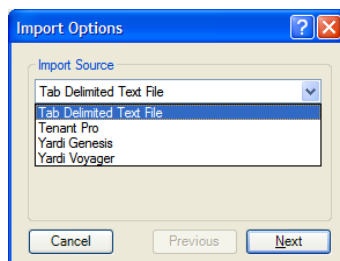
First, you will need to create an exported file, preferably a "Tab-Delimited Text File", from your leasing/property management software program and have it include the following **columns** in this **order**. If you aren't able to create a Tab-Delimited Text File directly from your software program, you can generally export your unit information from your software program into an Excel spreadsheet and then from Excel, save it as a Tab-Delimited text file instead of an Excel spreadsheet.

<u>Column Number</u>	<u>Imported Field</u>	<u>Field Description</u>
1	Property #	The Property ID associated with your unit.
2	Unit #	The Unit ID. If you rent and turn individual bedrooms, then this would be the ID of the bedroom.
3	Property Name	Name of the Property if there is one associated with that unit. If there isn't a name of the property, some companies use the partial address as the name of the property.
4	Building #	The Building ID if there is one associated with that unit. Many programs do not have Building ID in addition to the Property ID.
5	Address 1	1 <sup>st</sup> line of the physical address.
6	Address 2	2 <sup>nd</sup> line of the physical address.
7	Address 3	3 <sup>rd</sup> line of the physical address.
8	Address 4	4 <sup>th</sup> line of the physical address.
9	Unit Type	The type of unit (i.e. apartment, house, townhouse, condo, etc.)
10	Unit Description	The description of the unit (i.e. 1 Bedroom-1 Bath, 2 Bedroom-2 Bath, etc.)
11	Lease Expiration Date	The expiration date of the current tenant's lease for that unit.
12	Expected Vacate Date	If your program has a field for this then enter it. Otherwise, use the Lease Expiration Date. Sometimes you expect the tenant to move out before the lease expires in cases of eviction, lease breaks, etc.
13	Actual Vacate Date	The move-out date of the most recent past tenant.
14	Scheduled Move-in Date	The move-in date of a future tenant in that unit.

The first row is expected to be a header row and is skipped when importing data. You can leave any of the columns blank that don't apply, except for Property # and Unit # which are both required. The combination of Property # and Unit # is what Make Ready Manager considers the unique identifier for each unit.

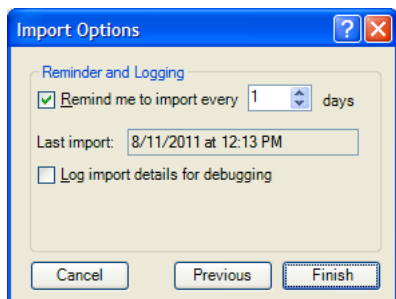
HINT: If you happen to have units which have the same Property # & Unit #, you will need to modify your data before you should import your unit information into Make Ready Manager to be able to include all your units, otherwise Make Ready Manager will only recognize one set of the duplicate Property# and Unit # information.

Once you set up an exported file from your management/leasing program, click Import Options in the Setup Menu in Make Ready Manager and select the Tab-Delimited Text File.

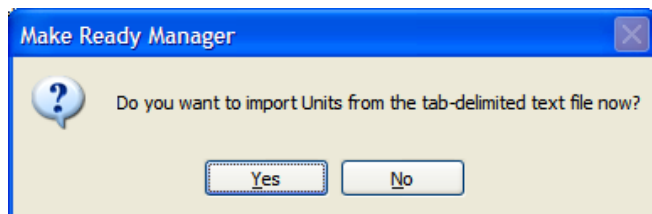


You will then receive a window informing you to set up a Tab-Delimited Text File as the above instructions describe.

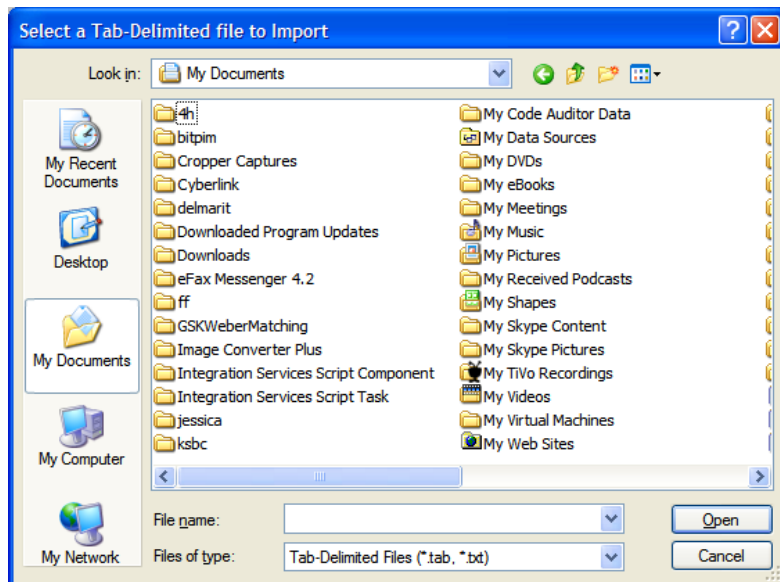
The next screen is for selecting the frequency of your imports. We recommend you have Make Ready Manager import your unit information on a regular basis so you have current lease expiration and move in dates. Because of the extra step up creating an Export File, you may choose to update every 7 days or manually keep your expiration dates and move-in dates updated which you probably are used to doing with other means of scheduling your make ready. Make Ready Manager will ask you when you start up the program at that frequency, if you want to import your unit information from your property management software so you can keep your unit information in Make Ready Manager updated with your software. Check the box “Log import details for debugging” if requested by Key Rental Solutions technical support staff. Click Finish



You will then be asked if you want to import units from the Tab-Delimited Text File now.



A window will be displayed for you to select a tab-delimited file to import. You can search for the file you created from your software program.



If there is a problem with duplicate Property #s and Unit #s in your data, a window will display showing those duplicates highlighted in yellow. You will need to correct any highlighted duplicates to proceed without missing unit data.

You will then have your units listed in the Unit List window. .

For further help on importing, please contact Key Rental Solutions technical support.

5) Manually Enter Your Unit Information

If you do not have an integration program and you are unable to import of your unit information using a tab-delimited text file, you will need to manually enter your unit information into Make Ready Manager. After you enter your units one time you then only need to keep the Lease Expiration Dates and Scheduled Move-In Dates updated on a regular basis. Go to the Units List tab on the menu and click Add to enter your unit information in this Unit Add window.

See the Add Units section in the User's Manual or click on the help button in the Add Units window to learn more about this window. Not all management programs use building #s in addition to unit #s but we made it available for those companies that do. The Expected Vacate Date is the Lease Expiration Date unless you are expecting that unit to vacate earlier than the lease expiration date in cases of eviction, lease breaks, etc. You will manually need to change the expected vacate date for those units that have something different going on with them.

6) Help Menus in each window: There is a help button in each window which gives more information about the window and what the functions can do. This can be helpful especially for new users.

7) Management Company Information Setup: Go to the Setup tab and click the Management Company Information option. This window contains information which will be displayed on the upper left corner of your reports generated from Make Ready Manager and information the system uses to email task reports to your workers. The Company Name will be the first line on reports generated, then the Report Header Line 2, 3 & 4 will be listed under it. You can enter contact information in these fields if you wish them to be displayed on reports. The email address should belong to the person who manages your Make Ready Manager process because it is the address that sends the Task Report to the workers and it is the address which will receive a copy of the sent report if the checkbox in the Report Email window is checked when emailing a task report to a worker.

8) System Updates: On the Setup tab there is an option for Check for Updates on Startup. Make Ready Manager has defaulted the program to have the Check for Updates on Startup to be on when you begin using the program. Make Ready Manager will use your internet connection to check for Make Ready Manager system updates every time you start the program. You can also manually check for system updates by clicking on the Check for System Updates button on the Setup menu.

9) Automatic Refresh: On the Setup tab there is an option for Automatically Refresh Views. Make Ready Manager has defaulted the program to have the Automatic Refresh Views to be on when you begin using the program. The feature, when on, will automatically refresh your Unit List, Workers & Boards to sort the list alphabetically or numerically by Property #, Building # and then by Unit #. If you do not have this Automatically Refresh Views selected, you will have the task of manually sorting your list the way you want, one column at a time.

10) Worker Skills: Go to Setup, Worker Skills and add or remove the skills to fit your business or workers. Make Ready Manager has provided you with typical skills for your workers. Worker Skills are individualized skills that a worker may possess. You can search for workers with a specific skill. We strongly recommend that you go through this list BEFORE you start using Make Ready Manager and add or remove the skills to your liking right from the start. If the terminology is not to your liking, you will need to remove the skill and add the term as you wish. Once you start using the skill, you



will not want to remove it or will not be able to change the name without a chance of corrupt or missing data. You can always add skills later as you set up your workers.

- 11) Setup your workers: Go to the Workers tab on the menu bar. Add your workers by selecting add on the menu. Once you add a worker to the list you can double click anywhere on the row in the Workers list to drill down and update information. Workers are your employees, vendors, or contracted companies who provide a service or perform any work done during your turns. Click the appropriate button to assign the worker as an employee or a vendor. A vendor includes companies who provide you a service. The active checkbox is automatically checked to indicate that this worker is actively doing a service for you. If you stop using this worker you can uncheck the active checkbox to make them inactive. Enter any information you have for the worker. An email address will be important if you want to email Task Reports to this worker. The notes field can be used to document when you started or stopped using this worker and anything else about this worker. Assign any number of skills to the worker that they are capable of doing. You can add new worker skills as necessary directly from this window by clicking the new button.
- 12) Customize Your Workers Window: Click on Customize on the menu. In this window check the fields you would like displayed in your Workers window and move them up or down in the list to change the order in which they will be displayed.
- 13) Customize Your Units List Window: Customize your Unit List window by clicking on the Units List tab on the menu, then click Customize. In this window check the fields/column headings you would like displayed in your Units List and move them up or down in the list to change the order in which they will be displayed. We suggest that you start out with selecting all the fields until you get familiar with what the fields contain. The Row is the row number in the list so you know how many units are displayed in the window. We suggest the Row field to be listed first. The "On Board" field will contain a "Y" if you have selected it to be on your Make Ready Board™. If the unit is not on the board, the "On Board" field will be blank. We suggest the "On Board" field to be the second column displayed on your Units List window.
- 14) Set up your Make Ready Tasks: Go to Setup and select Make Ready Tasks. In the Make Ready Task window there are two lists. The top list contains your Defaulted Tasks; the tasks you typically do when you turn a unit, which will also be the fields you want displayed on your Make Ready Board™. These Defaulted Tasks will be the tasks listed in that order in your Task Assignment window. You can move a task up or down this list depending on your company's task order preference. The bottom list is a list of Other Tasks that you may need to assign to a particular unit as necessary. If there is a task listed in the Other Tasks list that you want listed in your Defaulted Tasks list or likewise, the window allows you to move the task from one list to the other.

BEFORE YOU START USING MAKE READY MANAGER, if you do not like the terminology of the Defaulted Tasks that will be the column headings on your Make Ready Boards, you will need to remove the task and add a new task containing your own terminology. It is best to set up your defaulted tasks the way you do your turn-over, right from the start instead of changing or adding tasks later. Try to keep the Defaulted Task list to a minimum so as to not be inundated with too many fields on your Make Ready Board and in the Task Assignment Window. Once you start using a task, you will not want to remove it and will not be able to change the name without a chance of corrupt or missing data. You can always add tasks later as you learn the program. However, once a unit is added to the board, any newly added Defaulted Task will not show up in the Task Assignment window until it is removed and added to the board again.

FYI: The Other Tasks listed in this window will be combined in the field called "Other Tasks" which we recommend you display on your Make Ready Board. If you have Other Tasks assigned for that unit, it will have the status of the tasks listed on the Board so you know there are other tasks unassigned, assigned or completed for them. If no "Other Tasks" are assigned to a unit, the Make Ready Board will display a blank for that unit's "Other Tasks" field.

- 15) Customize your Make Ready Board™: The Make Ready Board is a customizable window that displays all the units you have added to your Make Ready process. The board will display the status of each task assigned and other pertinent information you need to know about your unit and its progress in its Make Ready process. Make Ready Manager gives you the option of setting up different Make Ready Board

views based on what each user in your office needs to see or do. Go to Setup, Make Ready Board, and then Manage Make Ready Boards. In this window you can add a new board view or customize an existing board by selecting the fields and putting them in the order you want them displayed. You can name a new board something as simple as your name or what its intended use will be. You can add or remove boards anytime after you start using Make Ready Manager without concern. We recommend keeping the selected tasks to a minimum, perhaps what will fit on your monitor so you can see at a glance the task statuses. **You will want to always select “Other Tasks” to be shown on your board view.** Non-regular tasks (ie. Extermination or tub repair) will be grouped together under Other Tasks, so those additional tasks are still represented on your board view.

- 16) Customize your Make Ready Board™ Tasks Colors:** Each user in your office can customize the colors of the task statuses. Have a different color for each of the three statuses: unassigned, assigned and completed. We have always liked white for the completed tasks to make it eye appealing when reviewing the Make Ready status on your units. Go to Setup, Make Ready Board, then select Change Make Ready Board Task Colors. Click on each of the statuses and then select the color that suits you best. Again, each computer can be set up to have the users own customized colors on the Make Ready Board.
- 17) Create Worker Task Reports:** Click on the drop-down arrow next to Report on the menu bar and click on Task Report.

**Reports are sorted automatically by Task, then by Worker, then by the first field/column listed. We recommend you set up your task reports to have fields to print listed in this order: 1) Can Do On or After, 2) Must be Done By, 3) Property #/Prop Name, 4) Unit #, 5) Unit Description, and 6) Task Notes.**

We encourage you to create a separate report for each worker to whom you will provide a report. To add or create a report for a worker, click the Add New button, enter the name of the report you want to create, select the unassigned checkbox, select all the possible tasks for that worker or click the select all button, select the worker and then select the fields you wish to print in your report by moving the fields from the “Fields Available List” to the “Field to Print List”. Move the field up or down in the “Fields To Print” list in the order you wish them to be printed on the report. Make sure you click the save button after adding/creating a report.

The print button will have you preview the report on your monitor before you print it. You can then choose to setup the page, print it, email it or save it. If you choose to email it, all the active workers who have email addresses will be displayed. You can pick the worker you want to email, change the subject line and add email text if you want. At the bottom of the email window is a button asking if you want to send a copy of the email to your property management company. We recommend that you leave this checkbox checked, and the email address displayed in the Management Company Information window in the Setup menu will be sent a copy of the email so you can save it in a sent folder in your email program for easy reference.

# Using Make Ready Manager®

## **Using the Units List Window:**

**Reason for the Units List window:** This window lists all the units you have imported from your property management/leasing program or manually entered into Make Ready Manager. Only certain units are intended to be in the Make Ready process at any given time: 1) units you anticipate to be vacated, 2) units that are vacant, and 3) units that have been recently occupied which can be removed from the board until it is time to turn them again. The filter criteria section in the Units List window allows you to filter your units so you can make the decision as to which units should be added to the board.

**Customize the Units List window:** You can customize the Units List window to display your most pertinent fields by clicking Customize on the menu or right clicking and select customize. You definitely want to

include the field "On Board". When a unit is added to the Make Ready Board the field will have a "Y" in it for Yes. We recommend that the "On Board" field is one of the first columns displayed in your Units List window. You can adjust the width of the fields by left clicking the adjustment arrow on the field title.

**Using the Filter Criteria:** Use the Filter Criteria section at the top of this window to filter your units. If you use more than one of the filtering selections and you intend to have both criteria met, (for example if you want units expecting to vacate during a certain time frame PLUS all the vacant units), you will need to click "Include All Selected Criteria" check box otherwise, the filtering feature will give you all the vacant units that were expected to vacate during that time frame. Play around with this checkbox to ensure you are including the units you intend to include otherwise it may give you unexpected results. Click the refresh button when changing filter criteria.

**Add or Remove Units from the Make Ready Board™:** On the upper right side of the window you will see a Make Ready Board section which contains a button to Add Unit to the Board. Select a unit in the list by clicking anywhere in its unit row. Then click Add Unit to the Board you will add that particular unit to the board, making the "On Board" field cell "Y" for that unit. Once the unit is added to the Make Ready Board it will remain on the board until you remove it after a new tenant moves into the unit or after the Make Ready process has been completed. We recommend that you leave it on the board until the unit becomes occupied again, so you know that the unit has been through the Make Ready process.

**Right-clicking:** You can right click anywhere in this window and get functions that are also found in the Edit drop down list or elsewhere on the window.

**Double-clicking:** You can double click anywhere in a particular unit's row to drill down to see the Update Unit window.

**Make units inactive so they don't show up:** If certain units become inactive, such as when you no longer manage them, you can make them inactive on the Units Window.

**Additional Sorting:** You can sort ascending any column by clicking on the column heading. Clicking on it again will sort it descending.

**Adjust width of Columns:** You can adjust the width of your columns in the Units List window to maximize the number of columns displayed on your monitor.

**Print:** You can print the Unit List window. Since the information on the Unit List window can be wide, we suggest adjusting the page setup options.

## **Add Unit Window:**

If you are not able to import your units into Make Ready Manager from your property management/leasing program you can add your units manually by clicking Add on the menu while in the Units List window. If you are able to import your unit information on a regular basis, you will not need to add units to Make Ready Manager.

Use the Add Unit window only if you can not import your units from your property management/leasing program.

The **inactive button** and the **Ignore Imported Values** can be disregarded since you are not importing from another program.

The **property #** is an identification number you use for the property. Not all management programs use a building # in addition to unit # but we made it available for those companies that do.

**Unit #** is the identification number for that unit. If the unit is a single family house, we recommend using the address number in this field.

The **address** field is self explanatory.

The **property name** can be the address or the name of the property if there is one.

**Unit Type** identifies the particular unit as an apartment, single family house, condo, office space, etc.

**Unit Description** identifies the particular unit as a 1 BR-1 Bath, 2 BR-1 Bath, etc for you and your workers to know what size of unit they are working in. You can enter any form of unit description here you choose.

The **Lease Expiration** is the date when your current tenant's lease expires.

The **Expected Vacate** can be the same date as the Lease Expiration Date unless you are expecting that unit to vacate earlier than the Lease Expiration Date in cases of eviction, skips, lease breaks, etc. Some companies have chosen to use only one of the dates instead of both. We have made it available for those companies who want to keep the lease expiration date as when the lease was intended to expire and be able to have the Expected Vacate date be a different date for special circumstances.

**Actual Vacate** is the date the tenant moved out.

**Scheduled Move In** is the date a future tenant is scheduled to move in or the lease start date for the future tenant.

**Unit notes** is a field in which you can enter notes about the unit, such as if it doesn't have carpet to be cleaned.

## **Update Unit Window:**

If you need to change information about a particular unit, you can 1) click Update in the Units List, 2) double click anywhere on the unit's row while in the Units List or 3) click the Update button in the Make Ready Board.

**Inactive Box:** If the unit you are updating is no longer managed, check the Inactive checkbox so this particular unit will be filtered out of your Units List window.

**Ignore Imported Values:** If you have an integration with your management/leasing program, AND you want to ignore the import for a particular unit, you should check the Ignore Imported Values checkbox.

**Changing Imported Information:** If you have an integration with your management/leasing program, you may override only your fields in the Update Unit window that aren't imported. Otherwise, when you import your unit information again, your unit information will revert back to what your management program has listed for that unit. The fields which do not import from your management program that you can change are the Inactive & Ignore Imported Values checkboxes, the Expected Vacate Date and the Notes field. The Actual Vacate Date may transfer from your management program depending on if your program has a similar field that is imported or perhaps Make Ready Manager uses your program's past tenant's lease expiration date. Ask Mikel if the Actual Vacate Date transfers.

**Changing the Expected Vacate Date:** If your unit information is imported, the Expected Vacate Date is defaulted as your unit's Lease Expiration Date. You can change the Expected Vacate date in cases of an eviction, skip, or lease break, etc. If you change the Expected Vacate Date and it is different than the imported Lease Expiration Date, Make Ready Manager will list it in the Import Results after you import your unit information asking if you want to change it. Some companies have chosen to use only one of the dates instead of both. We have made it available for those companies to want to keep the lease expiration date as when the lease was intended to expire and be able to have the Expected Vacate date be a different date for special circumstances.

**Entering a Scheduled Move In Date:** If your unit information is imported, you may want to enter the Scheduled Move In Date because you 1) can not enter the future tenant's information into your lease management program right away and you want to have up-to-date move-in dates in Make Ready Manager for efficient scheduling, 2) you have an approved application but no lease has been signed yet and you want to plan for the potential move-in date.

**If your unit information is not imported you will need to keep your units' Lease Expiration Dates and Schedule Move In Dates updated at all times.**

**Task History:** There is a tab in the Update Unit window called Task History. Task History is generated whenever a task is completed. This window contains the same fields as in the task assignment window. You can change the size of the columns and click & draw a column heading to arrange the columns as you wish.

## **Using the Make Ready Board™**

The Make Ready Board is the heart of the program. It is so much better to see this interactive board than the antiquated spreadsheets and marker boards that property managers have used. One of the best things about the Board is the Task Assignment window that is directly tied to it.

**Reason for the Make Ready Board™:** The board lists all your units you have added to the Make Ready Board from the Unit List window. Only certain units are intended to be in the Make Ready process at any given time: 1) units you anticipate to be vacated, 2) units that are vacant and 3) units that have recently become occupied which can be removed from the board until it is time to turn them again. The board will display the status of each task assigned and other pertinent information you need to know about your unit and its progress in the Make Ready process. Make Ready Manager gives you the option of setting up different Make Ready Boards based on what you or other users need to see or do. To set up other boards go to Setup, Make Ready Board, and then Manage Make Ready Boards where you can add a new board or change existing boards.

**Customize the Make Ready Board™:** You can customize the Make Ready Board to display your most pertinent fields by clicking Customize on the menu or right clicking and select customize. You can add or remove boards anytime after you start using Make Ready Manager without concern. We recommend keeping the selected tasks to a minimum- perhaps what will fit on your monitor so you can see at a glance the tasks' statuses. **Non-regular task (i.e. extermination or tub repair) will be grouped together under "Other Tasks". You will want to always select "Other Tasks" to be show on your board view so those additional tasks are still represented.**

**Using the Filter Criteria:** Use the Filter Criteria section at the top of this window to filter your units. If you use more than one of the filtering selections and you intend to have both criteria met, (for example if you want units expecting to vacate during a certain time frame PLUS all the vacant units), you will need to click "Include All Selected Criteria" check box. Otherwise, the filtering feature will give you all the vacant units that were expected to vacate during that time frame. Play around with this checkbox to ensure you are including the units you intend to include. Otherwise, it may give you unexpected results. Click the refresh button when changing filter criteria.

**Remove Units from the Make Ready Board™:** We suggest that you leave your units on the board until after a tenant moves in. When a unit is removed from the board all the task assignment information is stored in the Task History which can be accessed by clicking the Task History button in the Task Assignment window or by clicking the Task History tab in the Update Unit window. You can remove a unit from the Make Ready Board by clicking the Remove Unit from the Board button in the upper right corner of the board or right clicking and selecting Remove Unit from the Make Ready Board. .

**Group Task Assignment:** On the Make Ready Board there is a button for Group Task Assignment which can be used to assign or to mark as completed any task shown on your Make Ready Board for multiple units at a time. This is especially helpful when scheduling a large number of units to the same worker for the same day. To use this feature you must select more than one unit by using the Shift Key to select consecutive units or the Control Key to select non-consecutive units. You also must select the same task column for the multiple units. After you make your unit selection, click the Group Task Assignment button on the Make Ready Board. A Group Task Assignment window will display & you can proceed with your group assignment. The Group Task Assignment window has the same fields as the Task Assignment Window. Since you are assigning or changing multiple units at the same time, please be aware that you can not be unit specific in this window. To make unit specific changes, you can use the Task Assignment Window. If you selected units with different workers and different to do dates the fields will be grayed out. Be especially aware of the changes you make if some of these fields are grayed out.

**Right-clicking:** You can right click anywhere in the board and the get functions that are also found in the Edit drop down list or elsewhere on the window.

**Double-clicking:** You can double click anywhere in a particular unit's row on the board to drill down to see the Task Assignment window, or you can click Show Task Assignment button in the upper right corner of the board.

**Additional Sorting:** You can sort ascending any column by clicking on the column heading. Clicking on it again will sort it descending.

**Adjust width of Columns:** You can adjust the width of your columns in the Make Ready Board to maximize the number of columns displayed on your monitor. You can adjust the width of the fields by left clicking & dragging the adjustment arrow on the field title.

**Print:** You can print the Make Ready Board. Since the information on the Board can be wide, we suggest adjusting the page setup options under the File menu.

## **Using the Task Assignment Window**

You can get to a Unit's Task Assignment Window by 1) clicking to the Show Task Assignment button in the Make Ready Board, 2) double-clicking anywhere in the row for a particular unit while in the Make Ready Board window 3) right-clicking while in the Make Ready Board and selecting Show Task Assignment Window or 4) right clicking in the units window.

**Tasks:** In the Task Assignment Window you will find the defaulted tasks you set up (in the Setup, Make Ready Task option) as the typical tasks your company does when you turn your units. You can add or remove tasks as needed to get a particular unit ready by clicking on the Add Task or Remove Task buttons at the bottom of this window. You can also move tasks up or down in the list if you want the tasks to be in order as to when they will be done.

**Update Unit:** Click on the Update Unit button in the upper portion of Task Assignment window to update unit information, if needed, or add unit specific notes (ie. "carpet has 2 burn holes in it as of 8/1/10", or "this apartment has hardwood floors, therefore no carpet cleaning is needed").

**Task History button:** Task History is generated whenever a task is dated as completed. This window contains the same fields as in the Task Assignment window. You can change the size of the columns or click and drag a column heading to arrange the columns as you wish. The Task History is very important because it can tell you when the carpet was replaced in a unit last, or when it was Made Ready last, etc.

**Assign to Worker:** Click the down arrow next to the Assigned To Worker field for the task and find the worker you wish to assign this task. A Choose Worker window will be displayed. In this window you will find a list of recently assigned workers for that task. Once you assign a worker to a task, Make Ready Manager keeps that worker on the list of workers recently assigned that particular task for easy assigning. You can search for other workers with a particular skill at the top of the Choose Worker window or you can scroll through the complete list of active workers at the bottom. You can add a worker through this window if the worker has not been entered yet in the worker window.

**Date Assigned field:** The Date Assigned in the task assignment window is the date you sat down at your computer to decide to whom the task should be assigned. It is not the date the task is to be done. Your computer's system date is defaulted in this field when you assign a particular worker the task. The dates for the tasks to be done are for the next two columns. When a date is entered in the "Assigned To Worker" field, the task will show up as assigned and color coded appropriate for that status on the Make Ready Board regardless if dates were entered in the Can Do On or After and Must be Done By fields..

**Can Do On or After & Must Be Done By fields:** Because some managers want the flexibility to assign a date range for the task to be done, we have a starting date (Can Do On or After) and an ending date (Must Be Done By). You can make both these fields have the same date if you expect the task to be done in one day. Other times when you know it may take longer to do the task you may want to enter a date range for the task to be done. You can click on a particular day in the calendar shown in the window, and that date will populate any date field, or you can type in a date.

**Date of Actual Completion:** The date of the actual completion is when the task was done. You can 1) wait for the invoice to come in before you enter this date, 2) trust that the worker does it on the "Must Be Done

By” date and enter that date when that day arrives or 3) you can get confirmation from your worker before entering a date. It is up to your Make Ready policies. You can click on a particular day in the calendar shown in the window, and that date will populate the field, or you can type in a date.

**Task Notes:** The Task Notes can be very helpful to the worker or when keeping track of the particular information for that task. Here you can add information the worker needs to know about their task. For example: what color of paint to use, what time of day they need to do it when doubling up on the tasks, what rooms to re-carpet, etc.

All this Task Assignment information can be printed on the Task Report provided to the workers.

## **Using the Workers Window**

Go to the Workers tab on the menu.

The Worker window will list all your employees who do work in your units during the turn and vendors who provide a service.

**To add a Worker:** Add your workers by selecting add on the menu.

**To Update a Worker:** Double click anywhere on a row for a particular worker to make changes to the worker’s information.

**Using the Filter Criteria:** Use the Filter Criteria section at the top of this window to filter your workers. You can also search by skill or the name of a worker.

**Deleting a worker:** We strongly recommend you keep your worker in the program if you have used them in the past. Make the worker inactive instead. When a worker is removed from the system all the task assignment information is lost if you have used them before.

**Customize the Worker List:** You can customize the Worker list to display your most pertinent fields by clicking Customize on the menu or right clicking and select customize.

**Right-clicking:** You can right click anywhere in the board and the get functions that are also found in the Edit drop down list or elsewhere on the window.

**Double-clicking:** You can double click anywhere in a particular worker’s row to drill down to see the Update Worker window.

**Additional Sorting:** You can sort ascending any column by clicking on the column heading. Clicking on it again will sort it descending.

**Adjust Width of Columns:** You can adjust the width of your columns in the Workers window to maximize the number of columns displayed on your monitor. You can adjust the width of the fields by left clicking & dragging the adjustment arrow on the field title.

**Print:** You can print the Workers window. Since the information can be wide, we suggest adjusting the page setup options.

**To Add a Worker:** Workers are your employees, vendors, or contracted companies who provide a service or perform any work done during your turns. Click the appropriate button to assign the worker as an employee or a vendor. A vendor includes companies who provide you a service. The active checkbox is automatically checked to indicate that this worker is actively doing a service for you. If you stop using this worker you can uncheck the active checkbox to make them inactive. Enter any information you have for the worker. Use a short name (8 characters) which will be displayed in the Assigned task cells on the Make Ready Board. If no short name is enter, a defaulted name will be used. An email address will be important if you want to email Task Reports to this worker. The notes field can be used to document when you started or stopped using this worker and anything else about this worker. Assign any number of skills to the worker that they are capable of doing. You can add new worker skills as necessary directly from this window by clicking the new button

**To Update a Worker:** Double click anywhere on a row for a particular worker to make changes to the worker's information. Workers are your employees, vendors, or contracted companies who provide a service or perform any work done during your turns. Once a worker is added you can not change the status of employee or vendor. The active checkbox is automatically checked to indicate that this worker is actively doing a service for you. If you stop using this worker you can uncheck the active checkbox to make them inactive. You can change any information you have for the worker. Use a short name (8 characters) which will be displayed in the Assigned task cells on the Make Ready Board. If no short name is enter, a defaulted name will be used. An email address will be important if you want to email Task Reports to this worker. The notes field can be used to document when you started or stopped using this worker and anything else about this worker. Assign any number of skills to the worker that they are capable of doing. You can add new worker skills as necessary directly from this window by clicking the new button.

## **Reports**

**Printing windows:** The Workers window, Unit List window, & the Make Ready Board are all printable windows and have print preview and page set up windows available to adjust the page settings. They have been defaulted to print landscaped on legal sized paper. You can create a Make Ready Board specifically for printing so you can customize the board to show the fields you wish displayed and which will fit on your page.

**Reports; Task Report:** The Task Report is a very essential function of Make Ready Manager. These reports can be sent to your workers or designed to give you the task assignment information you need. Click on the drop down arrow next to Report on the menu bar and click on Task Report.

**Reports are sorted automatically by Task, then by Worker, then by the first field/column listed. We recommend you set up your work task reports to have fields to print listed in this order: 1) Can Do On or After, 2) Must be Done By, 3) Property #/Prop Name, 4) Unit #, 5) Unit Description, and 6) Task Notes.**

We encourage you to create a separate report for each worker to whom you will provide a report. To add or create a report, click the Add New button, enter the name of the report you want to create, select the unassigned checkbox, select any or all the possible tasks for that worker, select the worker and then select the field you wish to print in your report by moving the field from the fields available list. Move the "Fields To Print" up or down in the list in the order you wish them to be printed on the report. Make sure you click the save button after adding/creating a report.

The print button will have you preview the report on your monitor before you print it. You can then choose to setup the page, print it, email it or save it. If you choose to email it, all the active workers who have email addresses will be displayed. You can pick the worker you want to email, change the subject line and add email text if you want. At the bottom of the email window is a button asking if you want to send a copy of the email to your property management company. We recommend that you leave this checkbox checked, and the email address displayed in the Management Company Information window in the Setup menu will be sent a copy of the email so you can save it in a sent folder in your email program for easy reference.

Other reports can be set up using the Task Report window by selecting other criteria in the window.

**The Today Report** is another report you can review and print to see what activity you have scheduled for that day. This report can be helpful to determine who you need to follow up with to make sure a task is completed.

## **Submit Feedback**

We appreciate your feedback and enhancement suggestions. You can submit feedback by clicking the Help tab and selecting Submit Feedback.





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