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NOTE

This manual is a comprehensive guide to the main resources available through the myMRI Client Portal. Because Tenmast and its clients have just recently been set up in myMRI, some of the resources documented in this manual are not fully functional yet for Tenmast clients. They are noted below.

Knowledge Articles

Tenmast’s Job Aids and manuals are not yet available. Until they are, clients should continue searching for documentation on our legacy Support Portal:

<https://support.tenmast.com>

or in Tenmast University:

<http://tu.tenmast.com>

Documentation

A library for Tenmast has not yet been created. None of our release notes or other documents will be loaded until we have a library.

Community

A zone for Tenmast has not yet been created. There currently is no designated community forum for Tenmast clients.

Product Ideas

A zone for Tenmast has not yet been created. Therefore, clients cannot yet propose ideas for enhancements to Tenmast software.

Getting Started

What Is myMRI Client Portal?

The myMRI Client Portal is a self-service website that provides tools for Tenmast clients to obtain product support and communicate with MRI and other agencies. The following resources are available through myMRI:

- **Support Cases** – Review, submit and manage support cases for issues or problems you encounter with your Tenmast/MRI software.
- **Incident Reports** – View incident reports (IRs) associated with you, your support cases or your agency. An IR is an identified program issue that has been documented and reported to MRI's Product Management and Product Development teams. If a support case is submitted that identifies an issue with a product, an IR will be opened and associated with the case. When the IR is closed or resolved, the case contact will receive an email notification.
- **My Contacts** – Review and maintain contact information for your agency's employees.
- **Knowledge Articles** – View and download articles from a vast repository of information that has been documented over the years, such as Job Aids. You can search for knowledge articles by keyword, type, product family or application. If you submit a support case that can be addressed by an article, it will be attached to your case for future reference.
- **MRI Flix Videos** – Watch tutorial-style videos that walk you through content associated with knowledge articles.
- **Documentation** – View and download documents from a repository containing various content, including release notes, installation files and printable versions of web help.
- **Community** – Review, post and answer questions in a community forum.
- **Product Ideas** – Propose product ideas, vote on ideas from other users, and provide feedback through comments.

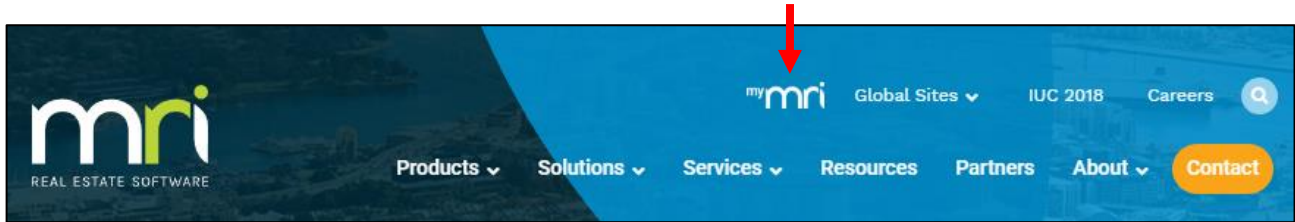
Profiles

There are 3 profiles available to myMRI users. The specific resources you can access in myMRI depend upon the profile to which you are assigned.

- **Designated Support Contact (DSC)** – This is the highest profile available and gives the user full access to all myMRI resources. To become a DSC, you must complete a *DSC Request Form* and submit it to Tenmast Customer Support by email to completeddscforms@tenmast.com. Tenmast will then forward the form to the MRI Support Organization for processing. The *DSC Request Form* is attached as an Additional Reference under the Tenmast University course **108 – How To Get Support Help**. You may also request it directly from Tenmast Customer Support.
- **Non DSC (Case Creation Allowed)** – This profile gives the user access to all myMRI resources except **My Contacts**. This profile can be assigned by a DSC to any contact at the agency.
- **Non DSC (Case Creation Not Allowed)** – This profile gives the user access to all myMRI resources except **My Contacts** and **Support Cases**. (Users can view support cases but not create them.) This profile can be assigned by a DSC to any contact at the agency.

Login To myMRI

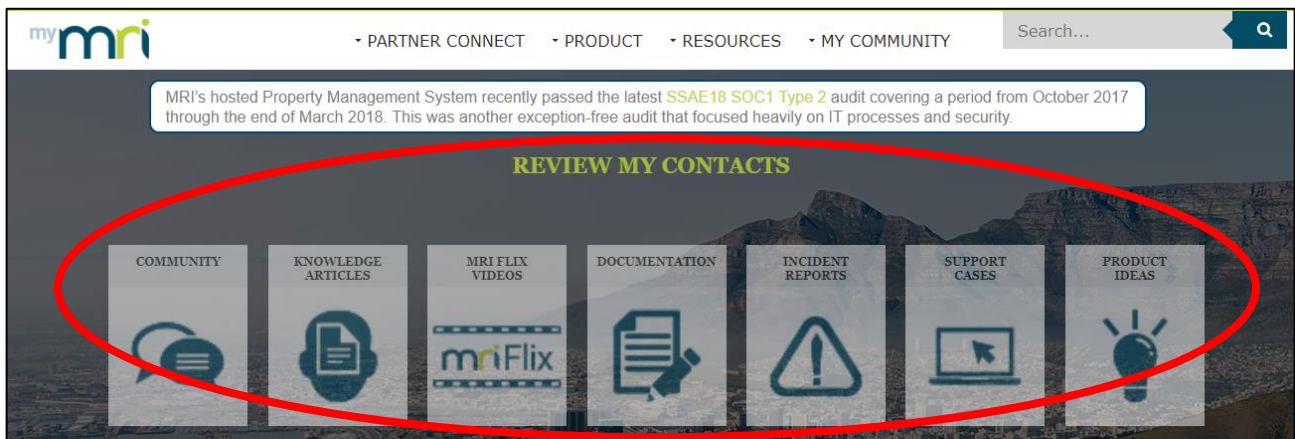
- 1 Go to www.mrisoftware.com in any web browser, then select the **myMRI** link at the top of the page.



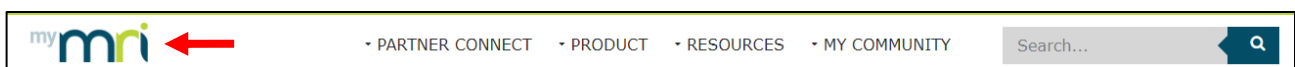
- 2 Login with your myMRI credentials. Your **Username** is your email address.

i If you forget your password, select the **Forgot Your Password?** link at the bottom. You will be prompted to enter your **Username** and then click a **Continue** button. You will then be sent an automated email with a temporary password.

- 3 The myMRI home page opens. All resources discussed in this manual can be accessed by clicking on the buttons or links in the area circled below.

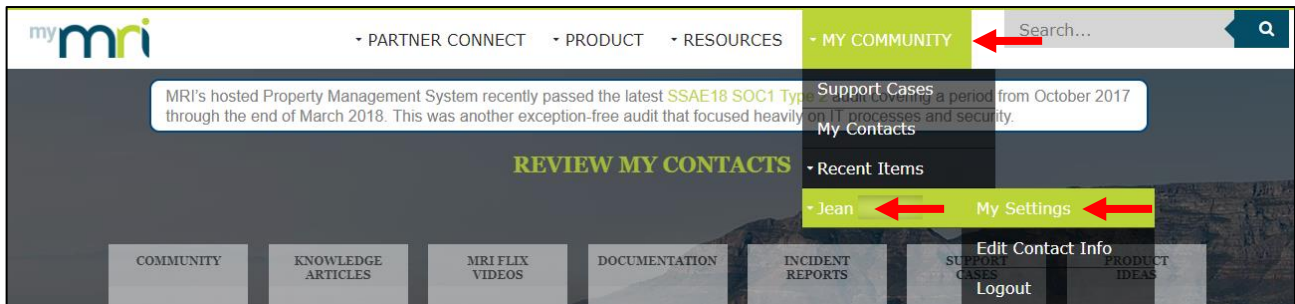


- 4 The following ribbon appears at the top of every page in myMRI. To return to the myMRI **Home** page from anywhere on the website, select the **myMRI** link on the left of the ribbon.

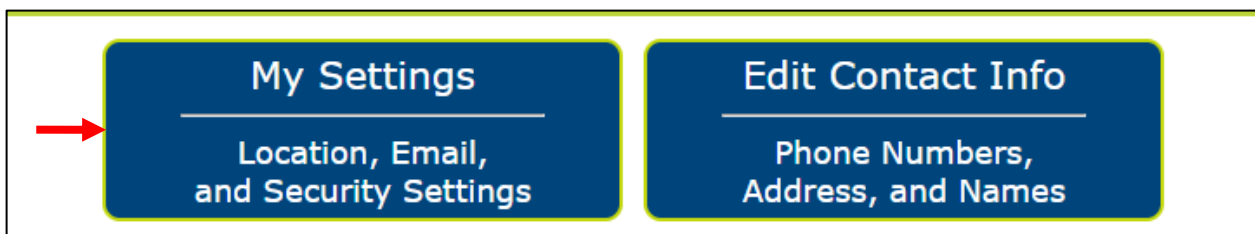


Change Your Password

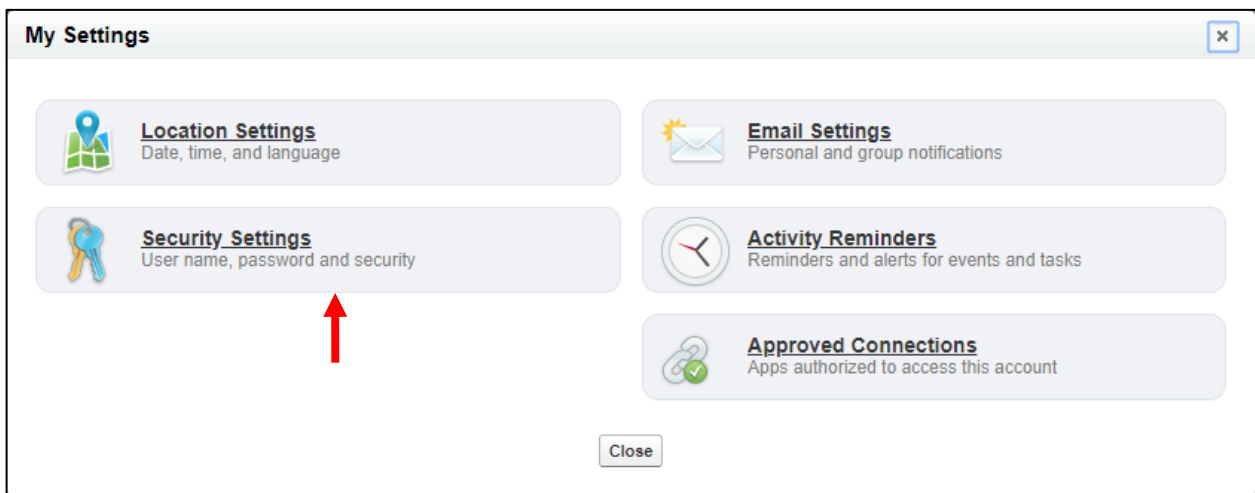
- 1 On the ribbon at the top of the page, select the **MY COMMUNITY** menu, then select your name, then select the **My Settings** submenu.



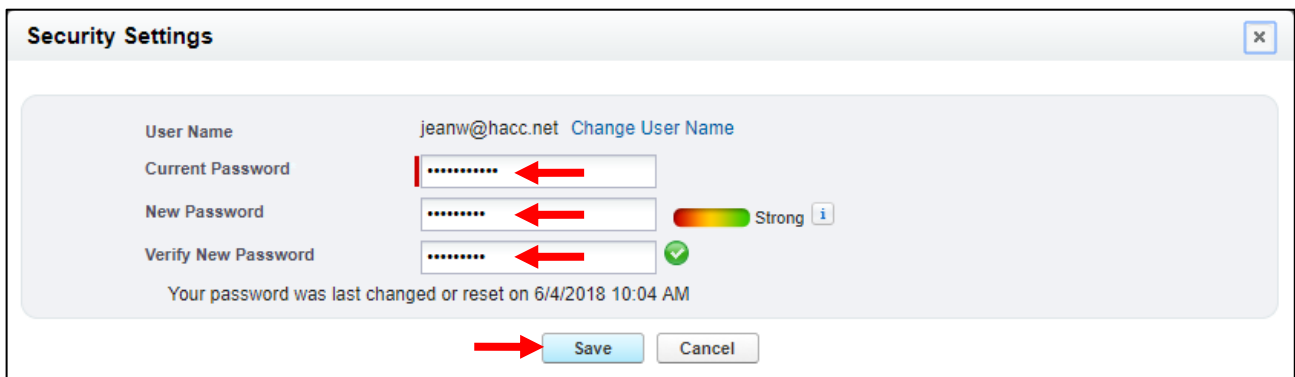
- 2 Click the **My Settings** button.



- 3 Click the **Security Settings** button.

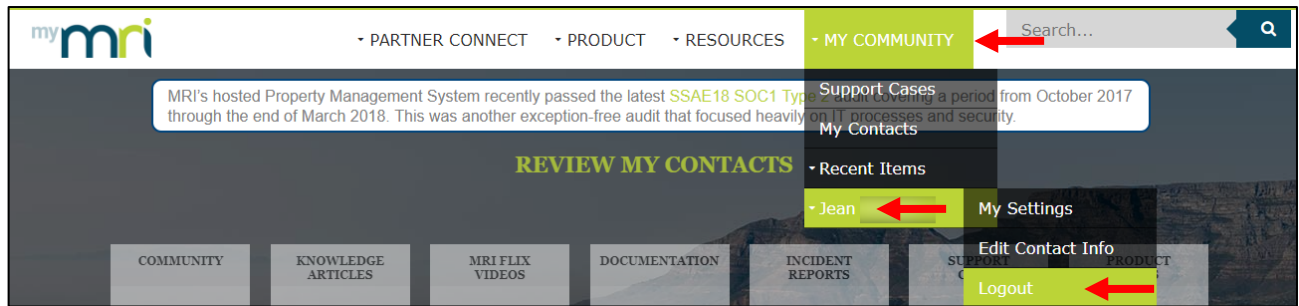


- 4 Enter your **Current Password** and the **New Password**, then verify it. Then click the **Save** button.



Logout Of myMRI

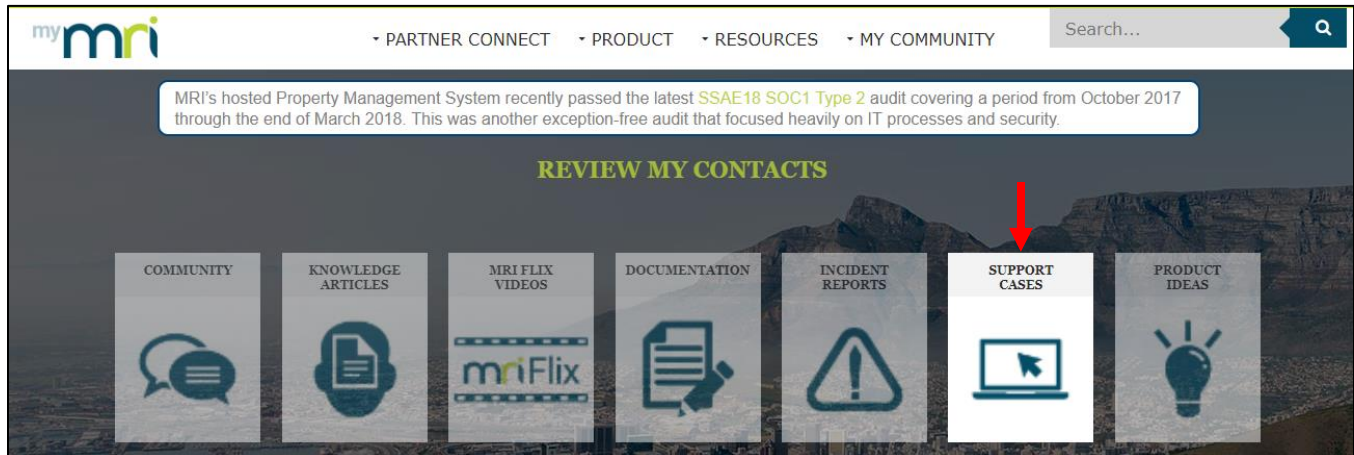
- 1 On the ribbon at the top of the page, select the **MY COMMUNITY** menu, then select your name, then select the **Logout** submenu.



Support Cases

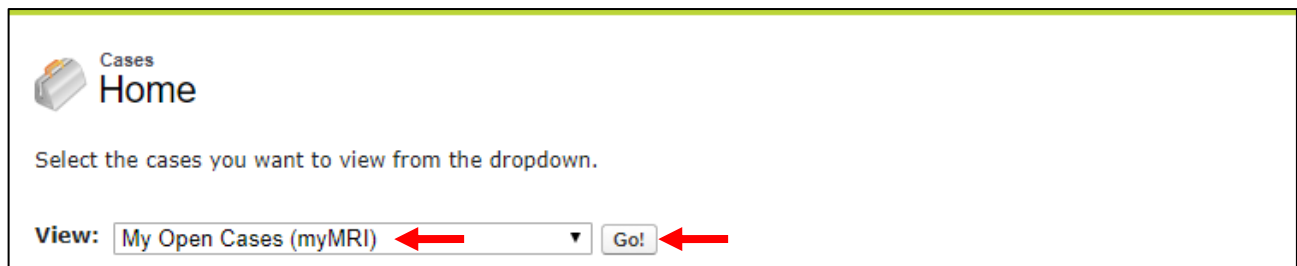
i Users assigned to the **Non DSC (Case Creation Not Allowed)** profile can view support cases but not create them.

Support cases are used to report and track issues or problems you encounter with your Tenmast/MRI software. To access **Support Cases**, click the **SUPPORT CASES** button on the myMRI home page.



View & Modify A Case

- 1 On the **Support Cases** home page, select a **View** to display the desired cases. Then click the **Go!** button. The following views apply to Tenmast agencies:
 - **All Cases (myMRI)** – All cases ever submitted by your agency.
 - **All Open Cases (myMRI)** – All cases submitted by your agency that are still open.
 - **Closed & Resolved Cases (myMRI)** – All cases submitted by your agency that have been closed.
 - **My Cases (myMRI)** – All cases *you* have ever submitted.
 - **My Closed/Resolved Cases (myMRI)** – All cases *you* have submitted that have been closed.
 - **My Open Cases (myMRI)** – All cases *you* have submitted that are still open.



- 2 The chosen cases are displayed. You can sort on any column by clicking the column name. To view details for a specific case, select its **Case Number** link.

The screenshot shows the 'Cases' table. The 'Case Number' column is highlighted with a red arrow.

Action	Case Number	Subject	Contact Name	Status	Date/Time Opened	Date/Time Closed	Case Owner Alias
Edit +	02142435	Issue - opened the ITSP and noticed ...	Jean	Escalated to Engineering	2/6/2017 3:13 PM		Tenmast Programming
Edit +	02200544	Issue - Every time I add a new work ...	Jean	Escalated to Engineering	12/29/2017 11:05 AM		Tenmast CVM – Service Request
Edit +	02219765	Request - Client is MTW and doesn't ...	Jean	In Process	2/26/2018 12:04 PM		Tenmast CVM – Customer Value Management


3 Case details are displayed.


Case Detail	
Case Contact	
Case Number	02219765
Contact Phone	21 [redacted]
Account	Housing Authority of [redacted]
Contact Mobile Phone	
Contact Name	Jean [redacted]
Contact Alternate Phone	
Contact Email	jean [redacted]
Preferred Method of Contact	
Tracking Number	<input type="text"/>
	<input type="button" value="Update Tracking Number"/>
Additional Email Recipients for Case Open/Close Email Notifications	
Additional Contact Email 1	Additional Contact Email 2
Additional Contact Email 3	Additional Contact Email 4
Additional Contact Email 5	Additional Contact Email 6
Entitlement Product Version	
Product Family	Tenmast
Environment	Production
Entitlement Name	W193999 Tenmast Only
Version	WT2+
Product Name	Tenmast Base - SAAS
Priority Status Tracking	
Priority	Normal
Date/Time Opened	2/26/2018 12:04 PM
Status	In Process
Date/Time Closed	
Case Origin	Email
I2C Applied	<input type="checkbox"/>

4 Scroll down to the **Case Comments** panel to view any comments that have been posted to this case. To add your own comment, click the **Add Comment** button.

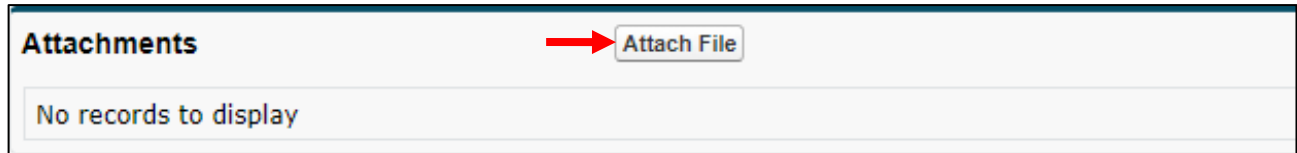
Case Comments
<input type="button" value="Add Comment"/>
Comment
Created By: MRI Integration (2/26/2018 3:00 PM) Last Modified By: MRI Integration (4/26/2018 12:47 AM) :Housing Authority of [redacted]_x000D_ Thank you for your response. A Customer Service Representative will review your response shortly.
Created By: MRI Integration (2/26/2018 2:57 PM) Last Modified By: MRI Integration (4/26/2018 12:47 AM) Jean [redacted]:Action added via e-mail. Sender: jean [redacted]_x000D_ Thank you Meagan!
Created By: Meagan Hall (2/26/2018 2:53 PM) Last Modified By: MRI Integration (4/26/2018 12:47 AM) Meagan Hall:Hi Jean,_x000D_ I have submitted your enhancement request over to programming. I made note that you are a MTW client and do not submit FSS information over to HUD. We appreciate your patience while we work to review and process this request._x000D_ Thank you!_x000D_ Meagan Hall_x000D_ Customer Service Representative_x000D_ 877.359.5492

5 Enter your **Comment** and click the **Save** button. The comment now appears in the **Case Comments** panel.

 When entering data on any page within myMRI, fields with a red bar | along the left are required.

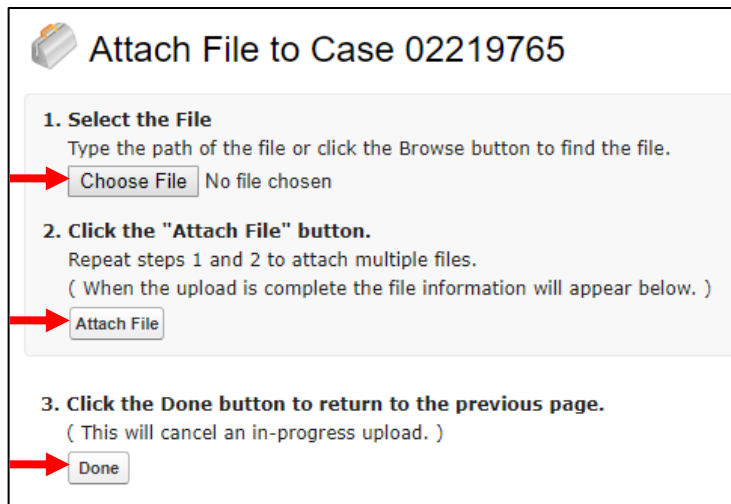
Case Comment Edit	
<input type="button" value="Save"/> <input type="button" value="Cancel"/>	
Case Details	
Subject	Request - Client is MTW and doesn't report their FSS info to HUD. That being said they would like to add an "exit reason" that can be customized as needed when needed.
Description	Request - Client is MTW and doesn't report their FSS info to HUD. That being said they would like to add an "exit reason" that can be customized as needed when needed.
Comment Details	
Comment	<input type="text" value="the additional screenshot you requested for this case is now attached."/> 

- 6 Scroll down to the **Attachments** panel to view any documents that have been attached to this case. To add an attachment, click the **Attach File** button.



- 7 Click the **Choose File** button and select the file to attach. Then click the **Attach File** button. Repeat this process to attach more than one file. When finished, click the **Done** button. Your document(s) now appears in the **Attachments** panel.

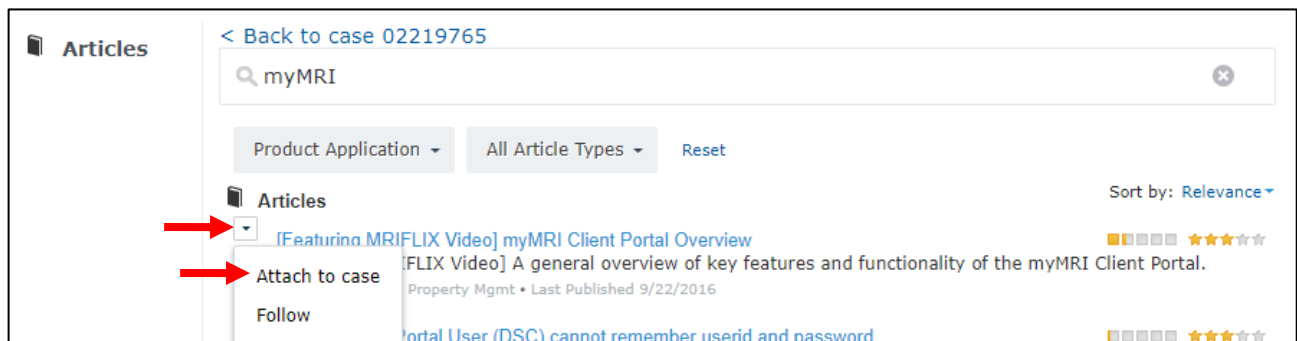
i To remove a document attached in error, select the **Del** link to the left of the document in the **Attachments** panel.



- 8 Scroll down to the **Articles** panel to view any knowledge articles that have been attached to this case. To find articles, click the **Find Articles** button.

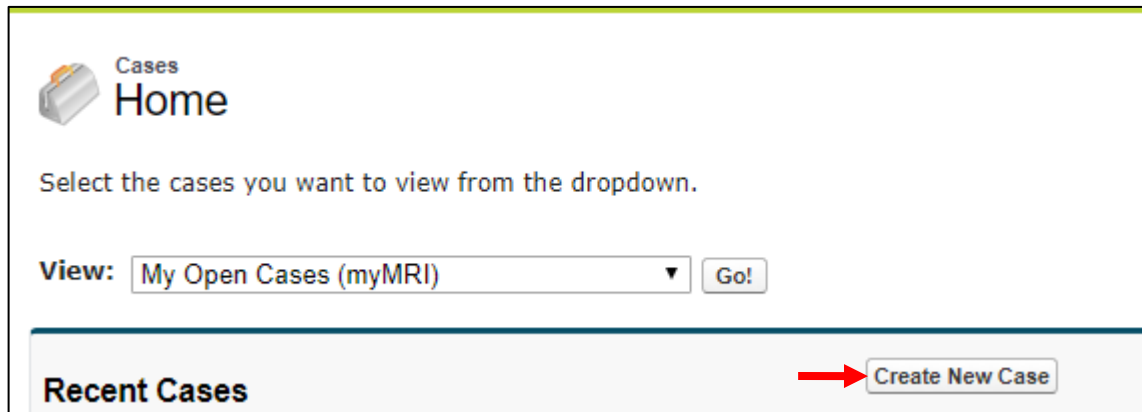


- 9 The system will automatically search on keywords within the case to find articles that may be related. To attach an article to the case, click the **▼** button to the left of the article and select **Attach to case**. The article now appears in the **Attachments** panel.



Submit A New Case

- 1 On the **Support Cases** home page, click the **Create New Case** button.



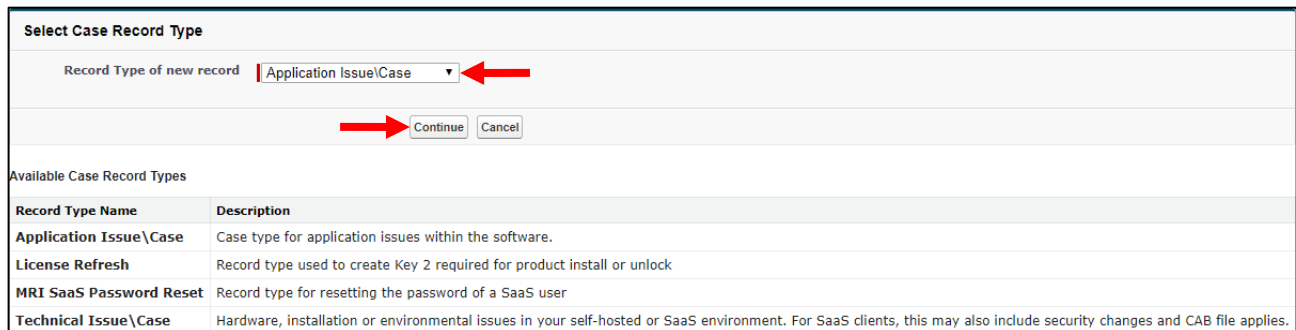
Cases Home

Select the cases you want to view from the dropdown.

View: My Open Cases (myMRI) Go!

Recent Cases → Create New Case

- 2 Select the **Record Type**. An explanation of available record types appears at the bottom of the panel. Then click the **Continue** button.



Select Case Record Type

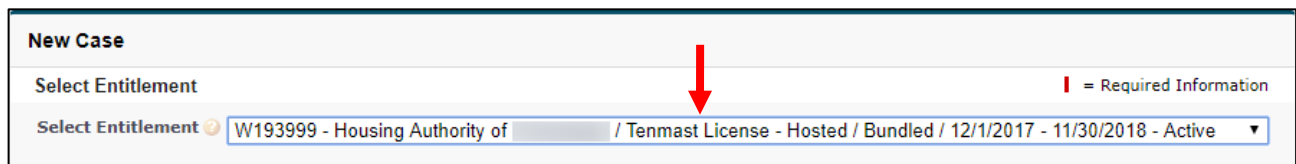
Record Type of new record Application Issue\Case →

→ Continue Cancel

Available Case Record Types

Record Type Name	Description
Application Issue\Case	Case type for application issues within the software.
License Refresh	Record type used to create Key 2 required for product install or unlock
MRI SaaS Password Reset	Record type for resetting the password of a SaaS user
Technical Issue\Case	Hardware, installation or environmental issues in your self-hosted or SaaS environment. For SaaS clients, this may also include security changes and CAB file applies.

- 3 Select the **Entitlement**. An *entitlement* is a software your agency is entitled to use through a contractual agreement with MRI. You will usually select *Tenmast License* in this drop-down list.

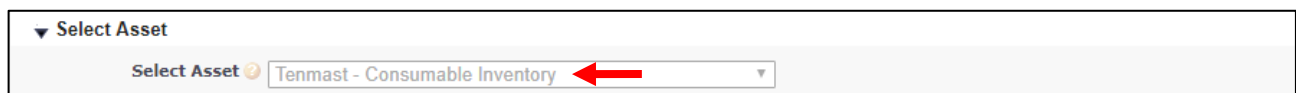


New Case

Select Entitlement I = Required Information

Select Entitlement W193999 - Housing Authority of / Tenmast License - Hosted / Bundled / 12/1/2017 - 11/30/2018 - Active →

- 4 Select the **Asset**. An *asset* is a specific module within the software.



Select Asset

Select Asset Tenmast - Consumable Inventory →

- 5 Select the **Environment and Version**.



Select Environment and Version

Select Version Select One... → Environment Production →

- 6 Enter a short **Subject** and a detailed **Description** for the case. You can optionally enter an internal **Tracking Number** if you have one. If you want to keep additional contacts informed about the case, you can also enter up to 6 emails in the **Additional Contact Email** fields.

i When entering data on any page within myMRI, fields with a red bar | along the left are required.

i To ensure the quickest resolution to your case, please be as specific as possible when entering the description, and attach any related documents or screenshots to the case. It is also helpful to specify if you are the only user experiencing the problem and when the best time would be to reach you. The Appendix at the end of this manual lists information needed for many of cases you might submit. Simply copy/paste the questions into the **Description** field and then answer them.

Description Information

Subject | Items not showing in list

Description | Our CI items are not displayed on the Browse Consumable Inventory Items screen.

Tracking Number |

Additional Email Recipients

Additional Contact Email 1 | Additional Contact Email 2 |

Additional Contact Email 3 | Additional Contact Email 4 |

Additional Contact Email 5 | Additional Contact Email 6 |

- 7 If you are not attaching a file (such as a screenshot) with the case, click the **Save** button. The case is now submitted, and details of the case are displayed. If you want to attach a file while saving, click the **Save and Attach** button and got to step 8.

New Case Save Save and Attach Cancel

- 8 Click the **Choose File** button and select the file to attach. Then click the **Attach File** button. Repeat this process to attach more than one file. When finished, click the **Done** button. The case is now submitted, and details of the case are displayed.

1. Select the File
Type the path of the file or click the Browse button to find the file.
Choose File No file chosen

2. Click the "Attach File" button.
Repeat steps 1 and 2 to attach multiple files.
(When the upload is complete the file information will appear below.)
Attach File

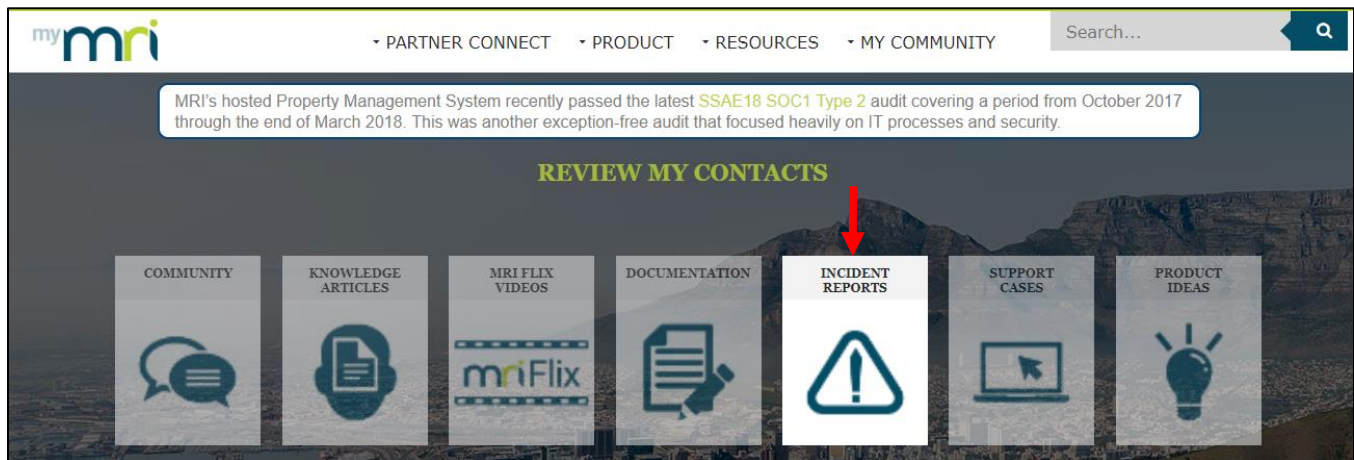
3. Click the Done button to return to the previous page.
(This will cancel an in-progress upload.)
Done

Incident Reports

An incident report (IR) is an identified program issue that has been documented and reported to MRI's Product Management and Product Development teams. IRs may be associated with you, your support cases or your agency.

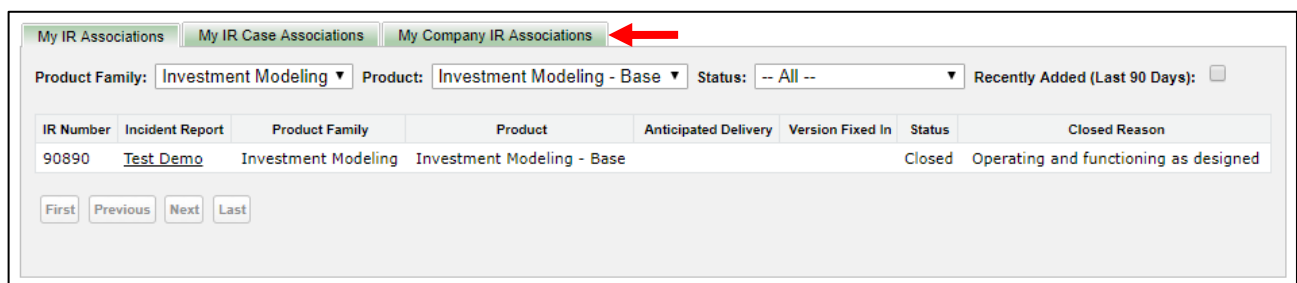
If you submit a support case that identifies an issue with a product, an IR will be opened and associated with the case. When the IR is closed or resolved, the you will receive an email notification.

To access **Incident Reports**, click the **INCIDENT REPORTS** button on the myMRI home page.

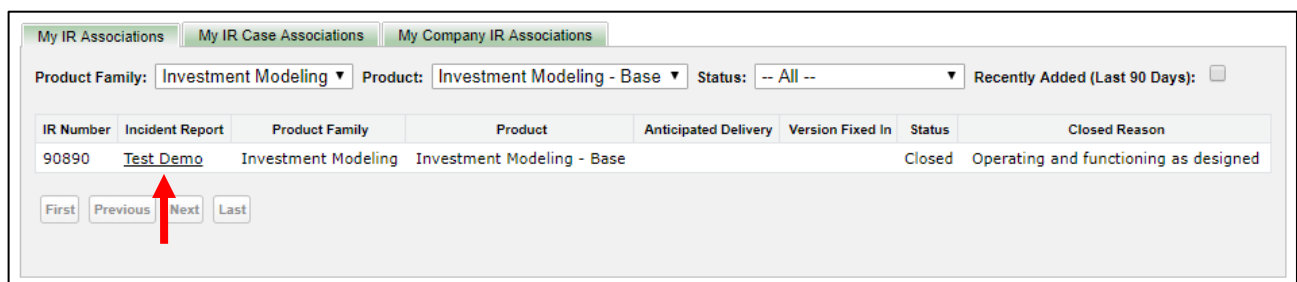


Follow these steps to view IRs:

- 1 The **Incident Reports** home page contains 3 tabs, described below. Select the desired tab to display a list of IRs.
 - **My IR Associations** – Displays IRs associated with you.
 - **My IR Case Associations** – Displays IRs associated with your cases.
 - **My Company IR Associations** – Displays IRs associated with your agency.



- 2 The chosen IRs are displayed. You can sort on any column by clicking the column name. You can also filter the list by **Product Family**, **Product** and **Status**. To view details for an IR, select its **Incident Report** link.



3 IR details are displayed.

Incident Report Detail

SFDC IR Number 90890

What is the Status?

Status	Closed	Closed Reason	Operating and functioning as designed
Duplicate Of			

Where is the Issue Found?

Product	Investment Modeling - Base	Application Type	Windows
Product Family	Investment Modeling	Device	
Product Family (Old)	Cougar	Operating System	
Version Reported In	8.26; 8.26; 8.27	Browser	
Version Fixed In			

What are the Details of the Issue?

Description	Test Demo
Problem	Fix it

Published Release Notes

Documented Workaround

Tracking

Date Created 7/29/2015

Versions Fixed				
Action	Version	Status	Reason Closed	Last Modified Date
	8.30	Closed	Considered operating and functioning as designed	5/10/2016

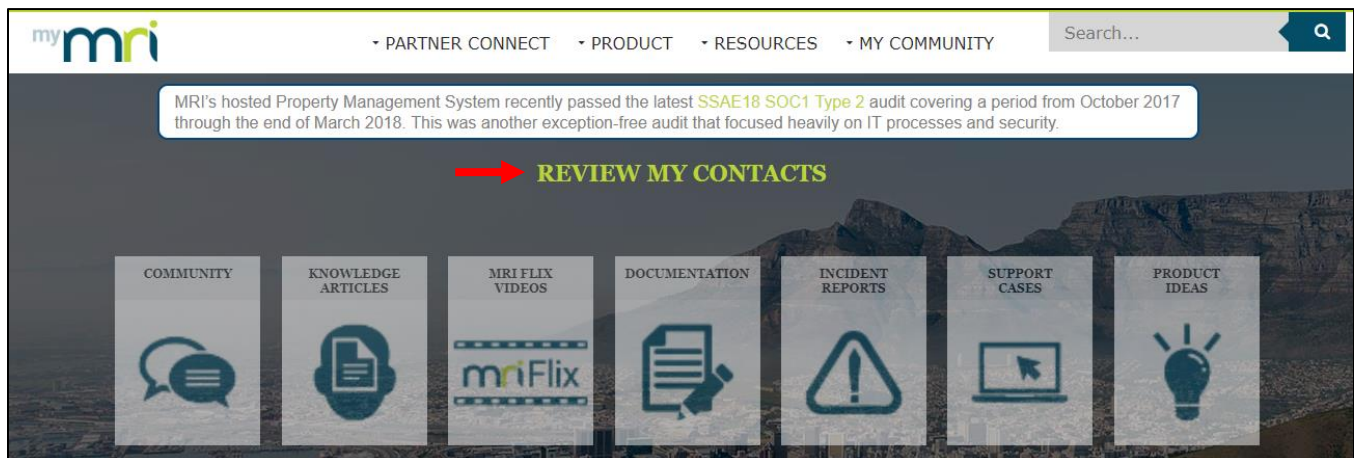
My Contacts

i This resource is only available to myMRI users assigned to the **Designated Support Contact (DSC)** profile.

All your agency's employees should be loaded as contacts in myMRI. For existing Tenmast clients, contacts were loaded by MRI during the switchover to myMRI. For new clients, contacts will be loaded by MRI during the implementation phase based upon data provided by the agency.

It is the responsibility of the Designated Support Contact (DSC) to keep your agency's contact information up to date once it has been loaded into myMRI. This is crucial to ensuring MRI has appropriate data in its records for client support, administration and marketing communications. MRI recommends you review your contacts at least every 3 months for accuracy.

To access **My Contacts**, click on the **REVIEW MY CONTACTS** link on the myMRI home page.



View & Modify A Contact

- 1 The **My Contacts** home page displays all active contacts at your agency in alphabetical order by **Last Name**. To view or modify a contact's information, select the **Manage Contact/User** link to the left of the contact's record.

The screenshot shows a table of contacts. A red arrow points to the 'Manage Contact/User' link for the first contact, Patricia.

	Last Name	First Name	Phone	Email	Number of Cases	Last Case Opened	Access to myMRI Client Portal	Last Login
Manage Contact/User Set Inactive		Patricia	21	patrici	39	4/27/2018 9:40 AM	Yes	5/23/2018 9:37 AM
Manage Contact/User Set Inactive		Alfred		alande	0		No	
Manage Contact/User Set Inactive		Tiffany	21	tiffany	1	6/7/2016 8:45 AM	No	
Manage Contact/User Set Inactive		James	21	james	52	4/26/2018 12:45 PM	No	

- 2 The contact's details are displayed. To modify the information, click the **Edit** button.

The screenshot shows the 'Contact Information' form. A red arrow points to the 'Edit' button. The form contains the following information:

Contact Information		Edit		Add myMRI Portal Access		Return to Contact Listing	
Name	Shirley	Title	Public Housing Property Manager				
Account Name	Housing Authority	Entitlement(s)	W193999 Tenmast Only, W193999 Resident Screening Only				
Email	shirley	Timezone					
Phone	21	Mobile					
Fax		Preferred Method of Contact					

3 Update the desired information and click the **Save** button.

i When entering data on any page within myMRI, fields with a red bar | along the left are required.

The screenshot shows a 'Contact Information' form with the following fields: Name (Shirley), Title (Public Housing Property Mar), Account Name (Housing Authority), Entitlement(s) (W193999 Tenmast Only, W193999 Resident Screening Only), Email (shirley), Timezone ((GMT-05:00) Eastern Time (US & Canada)), Phone (21), Mobile, Fax, and Preferred Method of Contact (--None--). A red arrow points to the 'Save' button.

4 Click the **Return to Contact Listing** button to return to the **My Contacts** home page.

The screenshot shows the same 'Contact Information' form as above, but with a red arrow pointing to the 'Return to Contact Listing' button. The 'Title' field is now 'Public Housing Property Manager' and the 'Timezone' is '(GMT-06:00) Central Time (US & Canada)'. The 'Phone' field is '21'.

Add A New Contact

1 On the **My Contacts** home page, click the **Add Contact** button.

The screenshot shows the 'Manage My Contacts' page. It includes a list of options for managing contacts and a 'Thank you' message. A red arrow points to the 'Add Contact' button. The 'Thank you' message says 'Thank you for recently reviewing your contacts!' and 'Last Reviewed: 6/4/2018'.

2 Enter the contact's information, then click the **Save** button.

i When entering data on any page within myMRI, fields with a red bar | along the left are required.

The screenshot shows a 'Contact Information' form with the following fields: First Name (John), Last Name (Doe), Title (Work Order Clerk), Email (jdoe@roadrunner.com), Timezone ((GMT-06:00) Central Time (US & Canada)), Phone ((502) 555-3333), Mobile ((502) 555-1212), Fax, and Preferred Method of Contact (EMAIL). A red arrow points to the 'Save' button.

- Click the **Return to Contact Listing** button to return to the **My Contacts** home page.

Contact Information

Edit Add myMRI Portal Access **Return to Contact Listing**

Name	John Doe	Title	Work Order Clerk
Account Name	Housing Authority of [redacted]	Entitlement(s)	
Email	jdoe@roadrunner.com	Timezone	(GMT-06:00) Central Time (US & Canada)
Phone	(502) 555-3333	Mobile	(502) 555-1212
Fax		Preferred Method of Contact	EMAIL

Manage myMRI Access

Any contact at your agency can be granted access to myMRI by a DSC. This involves assigning the contact to one of the following profiles:

- Non DSC (Case Creation Allowed)** – This profile gives the contact access to all myMRI resources except **My Contacts**.
- Non DSC (Case Creation Not Allowed)** – This profile gives the contact access to all myMRI resources except **My Contacts** and **Support Cases**. (Users can view support cases but not create them.)

A DSC may also revoke a contact's access to myMRI.



*A DSC cannot grant another contact access as a DSC or revoke another DSC's access. Instead, a DSC Request Form must be completed for the contact and sent to Tenmast Customer Support by email to completeddscforms@tenmast.com. The form will then be forwarded to MRI, and access will be granted or revoked. The DSC Request Form is attached as an Additional Reference under the Tenmast University course **108 – How To Get Support Help**. You may also request it directly from Tenmast Customer Support.*

Grant Access

- On the **My Contacts** home page, select the **Manage Contact/User** link to the left of the contact's record.

	Last Name	First Name	Phone	Email	Number of Cases	Last Case Opened	Access to myMRI Client Portal	Last Login
Manage Contact/User Set Inactive	[redacted]	Patricia	21	patric	39	4/27/2018 9:40 AM	Yes	5/23/2018 9:37 AM
Manage Contact/User Set Inactive	[redacted]	Alfred		aland	0		No	
Manage Contact/User Set Inactive	[redacted]	Tiffany	21	tiffany	1	6/7/2016 8:45 AM	No	
Manage Contact/User Set Inactive	[redacted]	James	21	james	52	4/26/2018 12:45 PM	No	

- The contact's details are displayed. Click the **Add myMRI Portal Access** button.



Contact Information

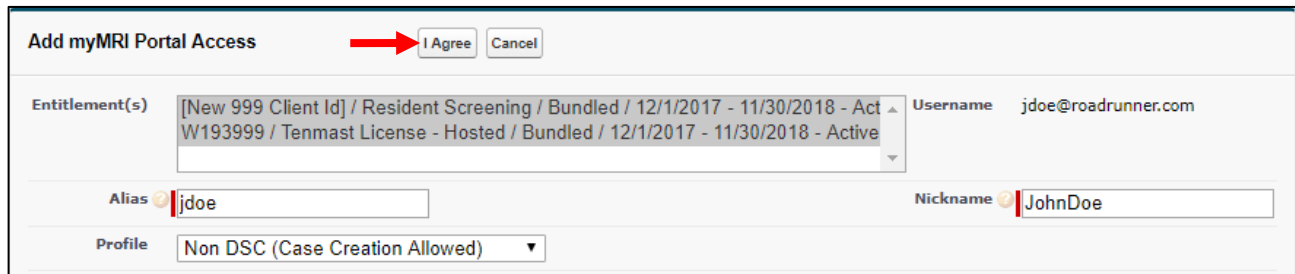
Edit Add myMRI Portal Access Return to Contact Listing

Name	John Doe	Title	Work Order Clerk
Account Name	Housing Authority of [redacted]	Entitlement(s)	
Email	jdoe@roadrunner.com	Timezone	(GMT-06:00) Central Time (US & Canada)
Phone	(502) 555-3333	Mobile	(502) 555-1212
Fax		Preferred Method of Contact	EMAIL

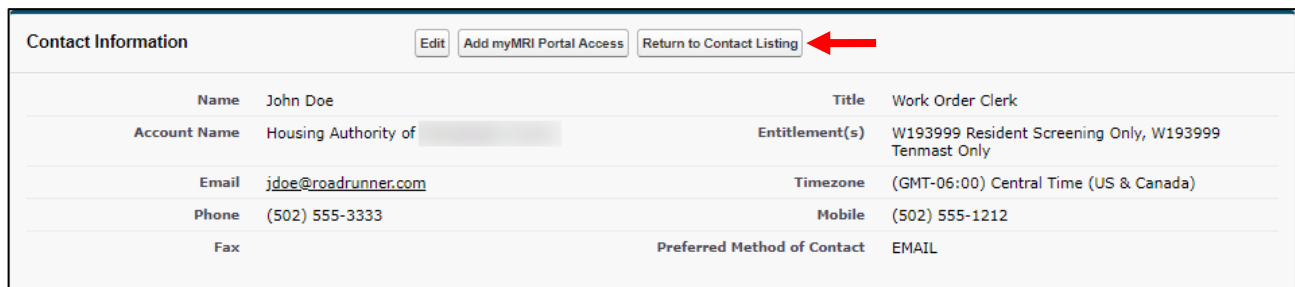
3 Select or enter the following information, then click the **I Agree** button.

- **Entitlement(s)** – Select your agency’s entitlement(s). To select multiple entitlements, hold down the SHIFT key while clicking on other entitlements.
- **Alias** – Enter a short name up to 8 characters long to identify the contact on list pages, reports and other pages where the entire name does not fit.
- **Nickname** – Enter a unique name up to 40 characters long to identify the contact in a community.
- **Profile** – Select the desire profile for this contact, as described at the beginning of this section.

 When entering data on any page within myMRI, fields with a red bar  along the left are required.



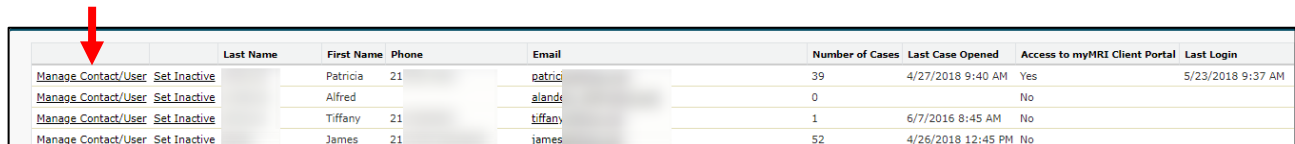
4 Click the **Return to Contact Listing** button to return to the **My Contacts** home page.



5 The contact will receive an automated welcome email with a link to login the first time and set a password.

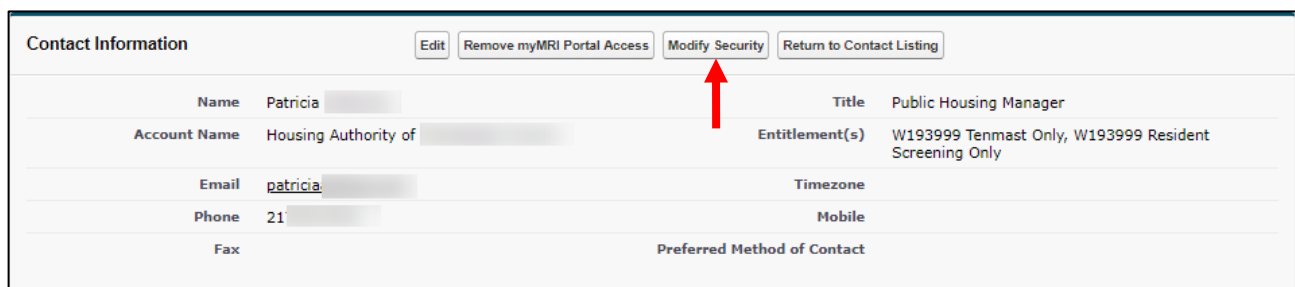
Change/Revoke Access

1 On the **My Contacts** home page, select the **Manage Contact/User** link to the left of the contact’s record.



	Last Name	First Name	Phone	Email	Number of Cases	Last Case Opened	Access to myMRI Client Portal	Last Login
Manage Contact/User Set Inactive	Patricia		21	patric	39	4/27/2018 9:40 AM	Yes	5/23/2018 9:37 AM
Manage Contact/User Set Inactive		Alfred		aland	0		No	
Manage Contact/User Set Inactive		Tiffany	21	tiffan	1	6/7/2016 8:45 AM	No	
Manage Contact/User Set Inactive	James		21	james	52	4/26/2018 12:45 PM	No	

2 The contact’s details are displayed. To change the contact’s access to the other option, click the **Modify Security** button.



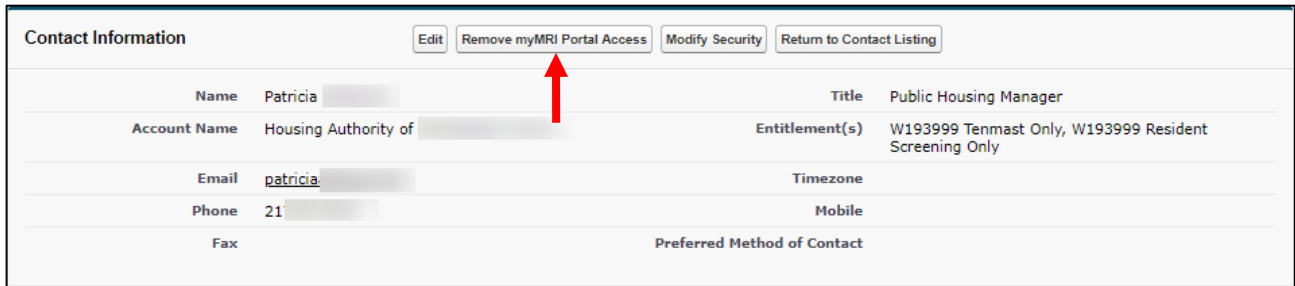
Then select the other option in the **Profile** field and click the **Save** button.



Contact Status/Activity

Access to myMRI Client Portal	Yes	Profile	Non DSC (Case Creation Allowed)
Number of Cases Created	39	Last Login	5/23/2018 9:37 AM
Last Case Opened	4/27/2018 9:40 AM	Alias	padki
Nickname	patriciaa		

3 To revoke the contact's access to myMRI, click the **Remove myMRI Portal Access** button.

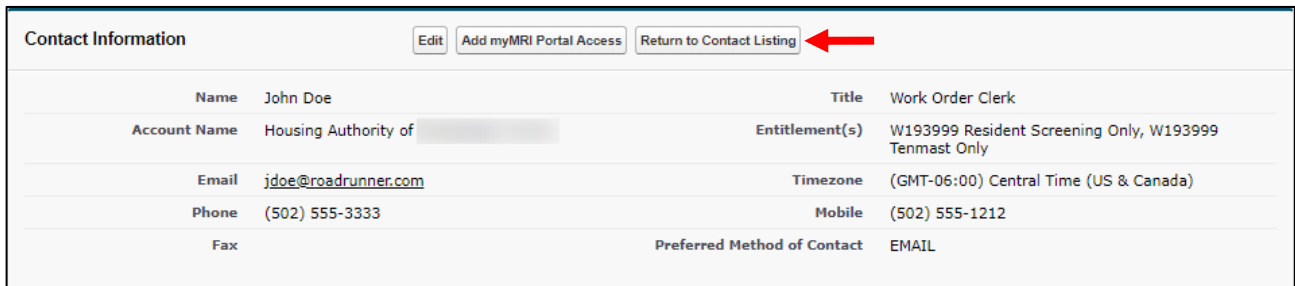


Contact Information

Edit Remove myMRI Portal Access Modify Security Return to Contact Listing

Name	Patricia	Title	Public Housing Manager
Account Name	Housing Authority of	Entitlement(s)	W193999 Tenmast Only, W193999 Resident Screening Only
Email	patricia	Timezone	
Phone	21	Mobile	
Fax		Preferred Method of Contact	

4 Click the **Return to Contact Listing** button to return to the **My Contacts** home page.



Contact Information

Edit Add myMRI Portal Access Return to Contact Listing

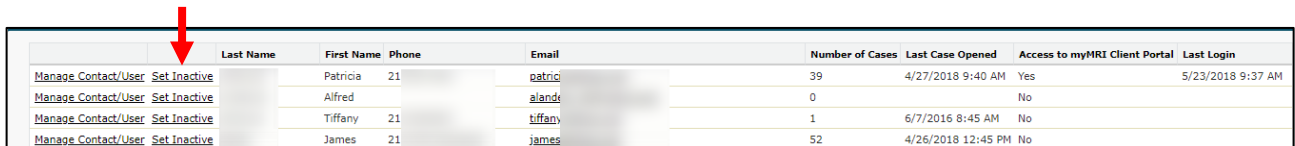
Name	John Doe	Title	Work Order Clerk
Account Name	Housing Authority of	Entitlement(s)	W193999 Resident Screening Only, W193999 Tenmast Only
Email	jdoe@roadrunner.com	Timezone	(GMT-06:00) Central Time (US & Canada)
Phone	(502) 555-3333	Mobile	(502) 555-1212
Fax		Preferred Method of Contact	EMAIL

Inactivate A Contact

Inactivating a contact will remove the person from your **My Contacts** list.

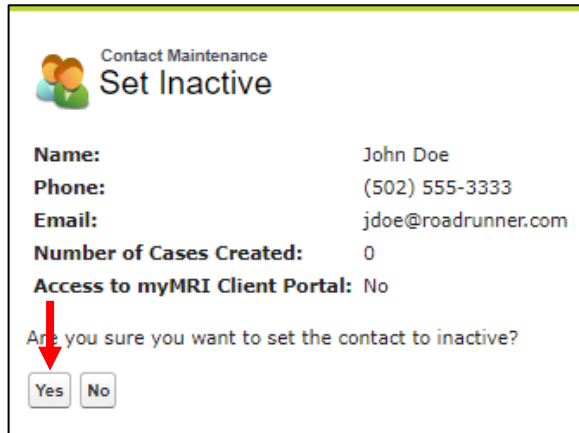
i If the contact has been granted access to myMRI, the access must first be revoked before you can inactivate the contact. See the previous section for instructions on revoking myMRI access.

1 On the **My Contacts** home page, select the **Set Inactive** link to the left of the contact's record.



	Last Name	First Name	Phone	Email	Number of Cases	Last Case Opened	Access to myMRI Client Portal	Last Login
Manage Contact/User Set Inactive		Patricia	21	patrici	39	4/27/2018 9:40 AM	Yes	5/23/2018 9:37 AM
Manage Contact/User Set Inactive		Alfred		aland	0		No	
Manage Contact/User Set Inactive		Tiffany	21	tiffany	1	6/7/2016 8:45 AM	No	
Manage Contact/User Set Inactive		James	21	james	52	4/26/2018 12:45 PM	No	

2 At the confirmation, click the **Yes** button.



Contact Maintenance
Set Inactive

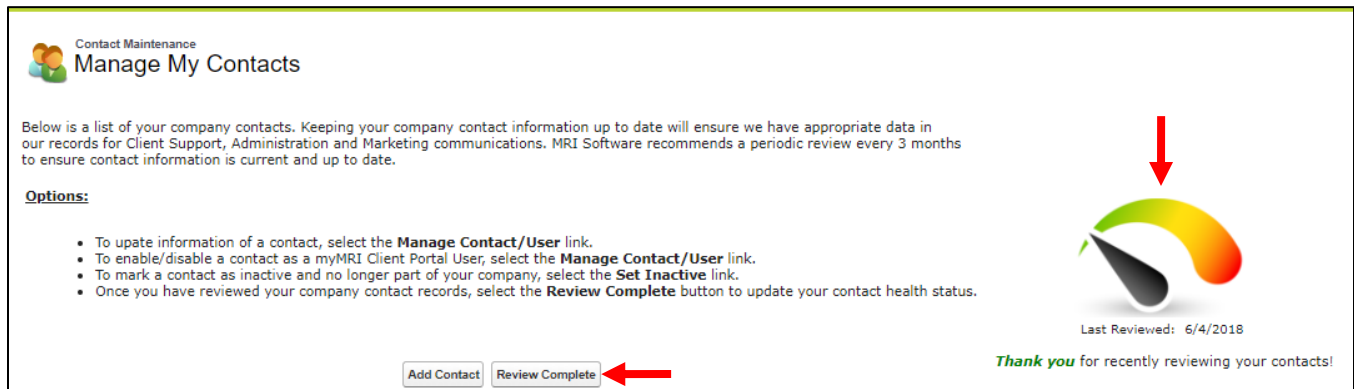
Name: John Doe
Phone: (502) 555-3333
Email: jdoe@roadrunner.com
Number of Cases Created: 0
Access to myMRI Client Portal: No

Are you sure you want to set the contact to inactive?

Contact Health Status

On the **My Contacts** home page, a meter displays the status of your agency's *contact health*. This is simply an indication of the last time your contacts were reviewed. To keep your status in the green zone, you should review your contacts periodically—at least once every 3 months.

To update the meter, click the **Review Complete** button on the **My Contacts** home page any time you have finished reviewing or updating contact information.




Contact Maintenance
Manage My Contacts

Below is a list of your company contacts. Keeping your company contact information up to date will ensure we have appropriate data in our records for Client Support, Administration and Marketing communications. MRI Software recommends a periodic review every 3 months to ensure contact information is current and up to date.

Options:

- To update information of a contact, select the **Manage Contact/User** link.
- To enable/disable a contact as a myMRI Client Portal User, select the **Manage Contact/User** link.
- To mark a contact as inactive and no longer part of your company, select the **Set Inactive** link.
- Once you have reviewed your company contact records, select the **Review Complete** button to update your contact health status.

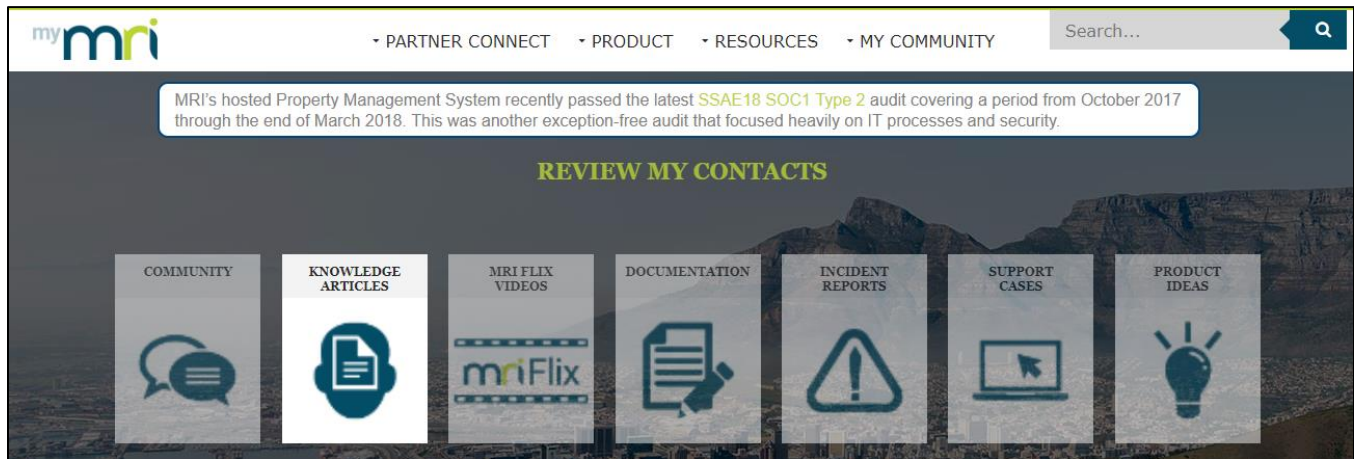

Last Reviewed: 6/4/2018
Thank you for recently reviewing your contacts!

Knowledge Articles

The **Knowledge Articles** resource is a large repository of information that has been documented over the years. These articles address common support questions, product how-to's and new features. You can search the repository by keyword, product application or type. You can also provide valuable feedback to MRI on the quality of articles by rating them.

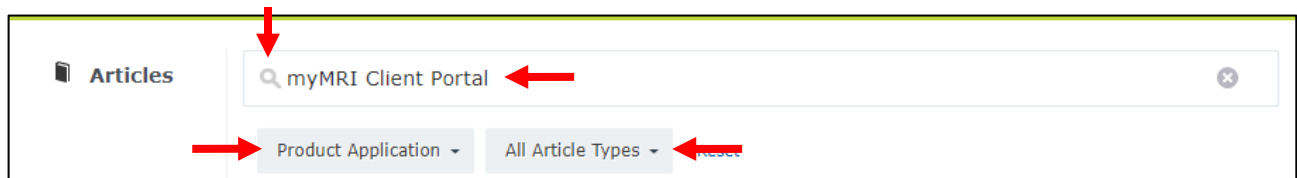
If you submit a support case that can be addressed by an article, it will be attached to your case for future reference.

To access **Knowledge Articles**, click the **KNOWLEDGE ARTICLES** button on the myMRI home page.

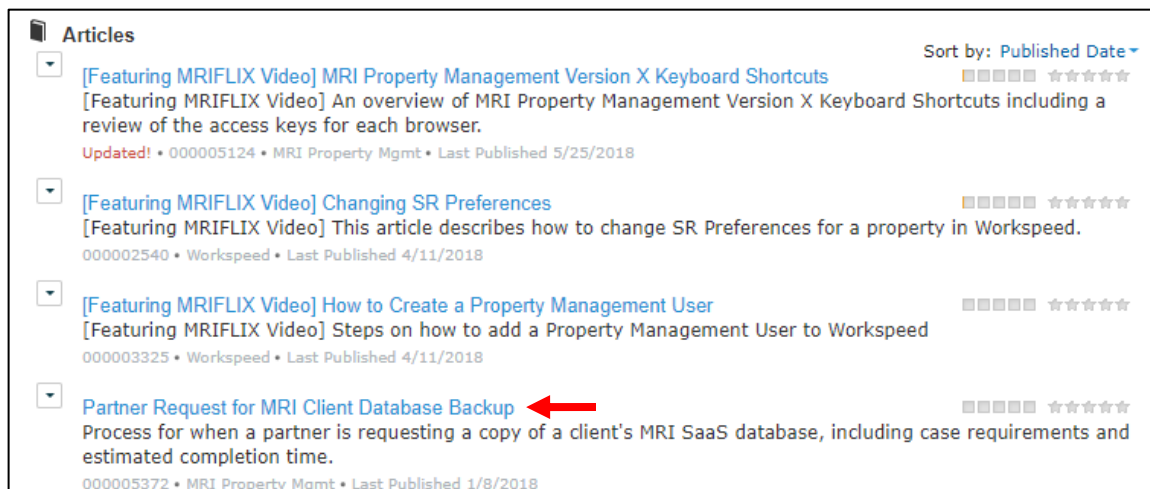


Follow these steps to browse, view, download and rate knowledge articles:

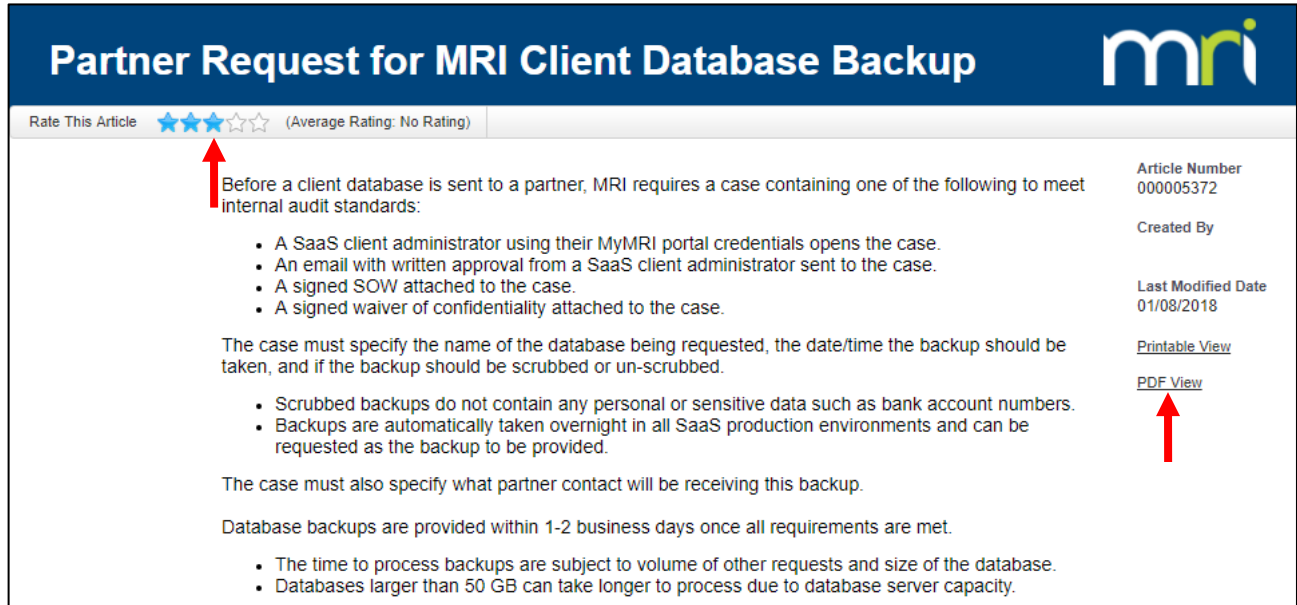
- 1 On the **Articles** home page, enter a keyword or phrase in the search box, then click the magnifying glass icon to the left of the box. You can also filter the results by selecting options from the **Product Application** and **Article Types** drop-down lists.





- 2 A list of matching articles is displayed. Select an article's name to view it.



- 3 The article is displayed. To rate the article, click on the number of stars you would like to give it (up to 5). To print or download the article, click the **PDF View** link.



Partner Request for MRI Client Database Backup 

Rate This Article  (Average Rating: No Rating)

Before a client database is sent to a partner, MRI requires a case containing one of the following to meet internal audit standards:

- A SaaS client administrator using their MyMRI portal credentials opens the case.
- An email with written approval from a SaaS client administrator sent to the case.
- A signed SOW attached to the case.
- A signed waiver of confidentiality attached to the case.

The case must specify the name of the database being requested, the date/time the backup should be taken, and if the backup should be scrubbed or un-scrubbed.

- Scrubbed backups do not contain any personal or sensitive data such as bank account numbers.
- Backups are automatically taken overnight in all SaaS production environments and can be requested as the backup to be provided.

The case must also specify what partner contact will be receiving this backup.

Database backups are provided within 1-2 business days once all requirements are met.

- The time to process backups are subject to volume of other requests and size of the database.
- Databases larger than 50 GB can take longer to process due to database server capacity.

Article Number: 000005372
Created By:
Last Modified Date: 01/08/2018
[Printable View](#)
[PDF View](#)

- 4 The article opens in your PDF viewer, where you can print or download it.



ka10G000000917a 1 / 1


REAL ESTATE SOFTWARE

Article Number 000005372 | Last Modified Date 01/08/2018

Partner Request for MRI Client Database Backup

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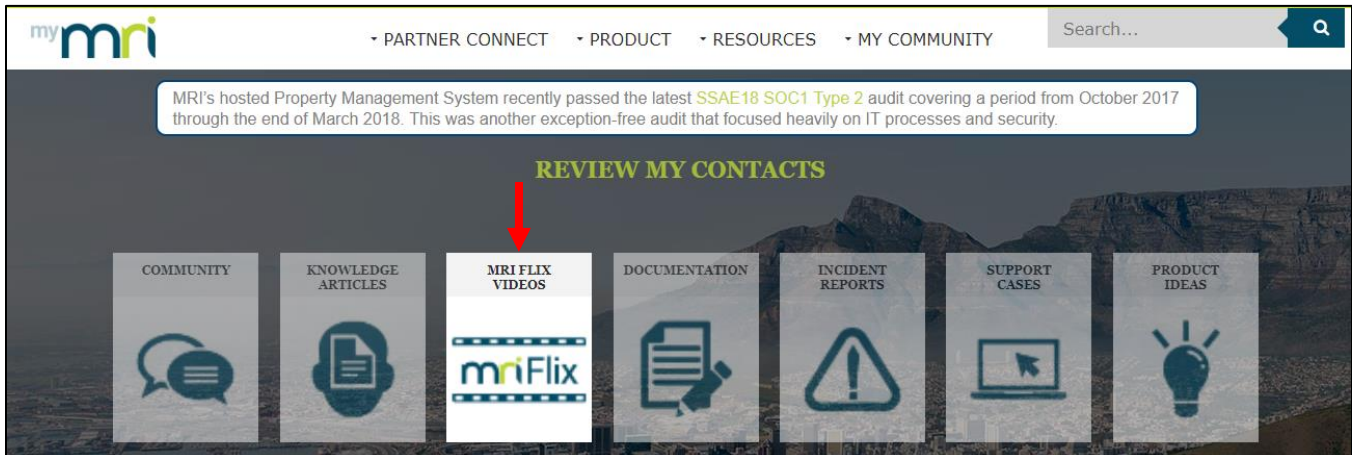
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MRI Flix Videos

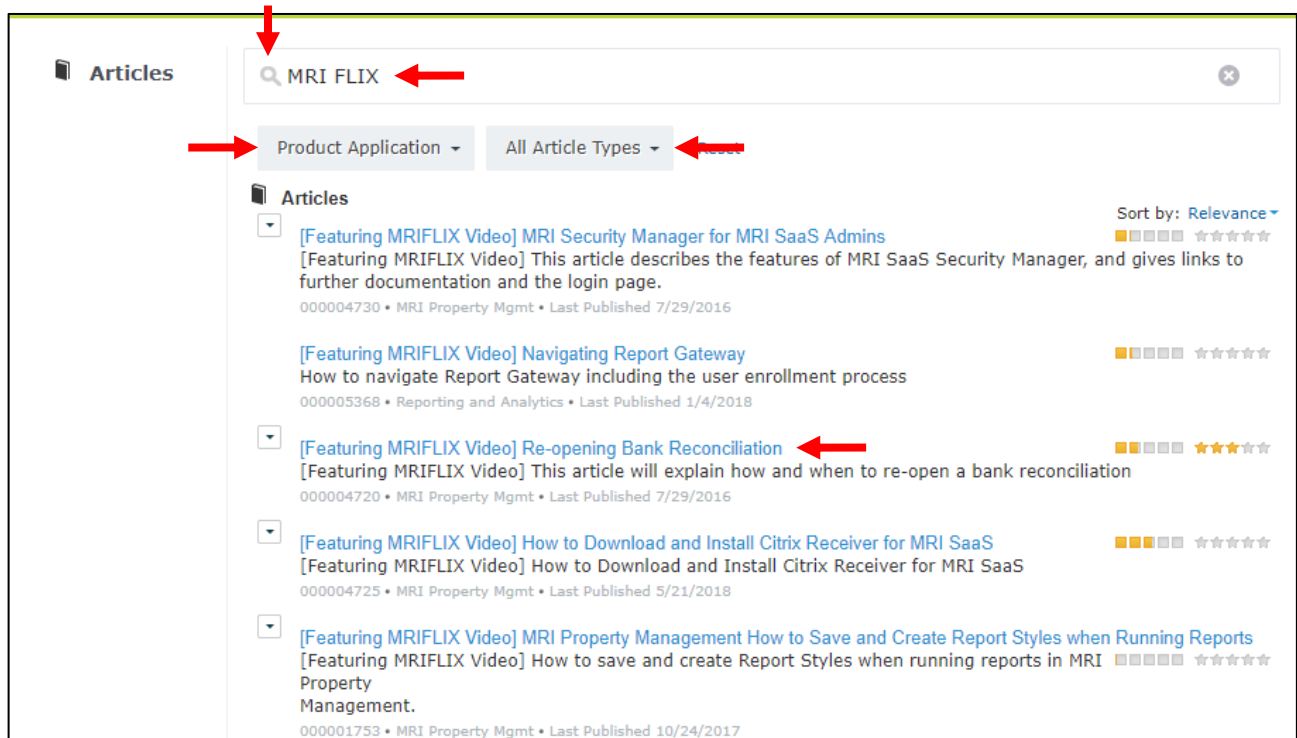
Flix videos are short tutorial-style videos that address product how-to questions, common support questions and overviews of new features or enhancements within a product. These videos are associated with many of the knowledge articles on myMRI.

To access **MRI Flix Videos**, click the **MRI FLIX VIDEOS** button on the myMRI home page.



Follow these steps to browse, watch and share flix videos:

- 1 Opening **MRI Flix Videos** takes you to the **Articles** home page and displays all articles that have an associated video. These are indicated by the phrase **[Featuring MRIFLIX Video]** in the name of the article. To narrow the results, you can enter a keyword or phrase in the search box, then click the magnifying glass icon to the left of the box. You can also filter by **Product Application** and **Article Type**. Once you have found the desired video/article, select the article's name to view it.



- 2 The video appears above the printed article associated with it. All video controls are at the bottom of the video player. The start button is on the far left, followed by the progress bar. The total length of the video is displayed at the beginning of the progress bar. Volume and full-screen controls are on the right.



- 3 You can share the video on Facebook, Twitter or Tumblr by clicking the **Share** button on the right. You can also share it by copying/pasting the video's URL shown above the video player.



- 4 After watching the video, you can scroll down to view the printed article. As with any article, you can rate it and open the PDF to print or download it.

[Featuring MRIFLIX Video] Re-opening Bank Reconciliation mri

Rate This Article ☆☆☆☆ (Average Rating: 3)

There are two ways to re-open a reconciliation. You can use queries or you can use a report named CS_REOPENBR that was developed for use by MRI support representatives. All MRI SaaS clients have this report in their database. Please contact MRI Support if you would like to have this report but are not an MRI SaaS client.

When re-opening a reconciliation, it is important to consider whether there are any open reconciliations that are for the same bank as the reconciliation that needs to be reopened. MRI recommends that you do not re-open a reconciliation if an open reconciliation exists for the same bank. The CS_REOPENBR report will not allow you to do so.

You should also be careful if there are closed reconciliations that come after the reconciliation that is to be opened. Outstanding items on reopened reconciliations will disappear if they have been cleared on later reconciliations.

Using the report

1. Click **Reports**.
2. Select **Run Reports** and enter CS_REOPENBR in the search box.
3. Click the report name to open the run-time screen.
4. Use the drop down to select the reconciliation to be re-opened.

The report will show the bank ID, close date, reconciliation period and all items that were cleared on the reconciliation. It will also display a warning if the reconciliation can't be re-opened due to an existing open reconciliation. MRI recommends that you run the report in edit mode first before updating any records.

Article Number
000004720

Created By
Tyler Tomaszewski @ MRI Software

Last Modified Date
03/08/2017

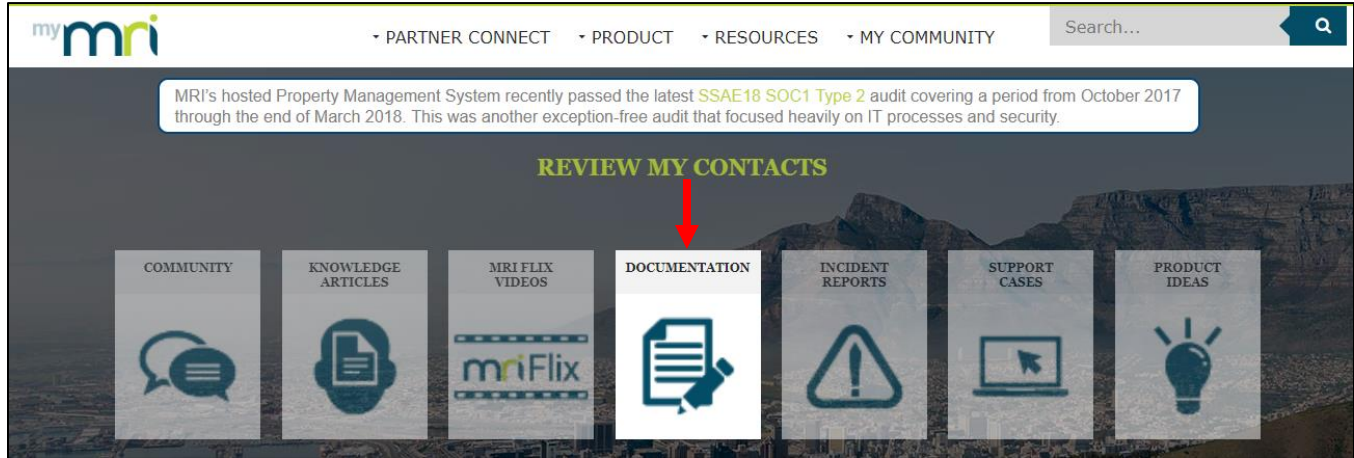
[Printable View](#)

[PDF View](#)

Documentation

The **Documentation** resource is a repository of documents containing various content, including release notes, installation files and printable versions of web help.

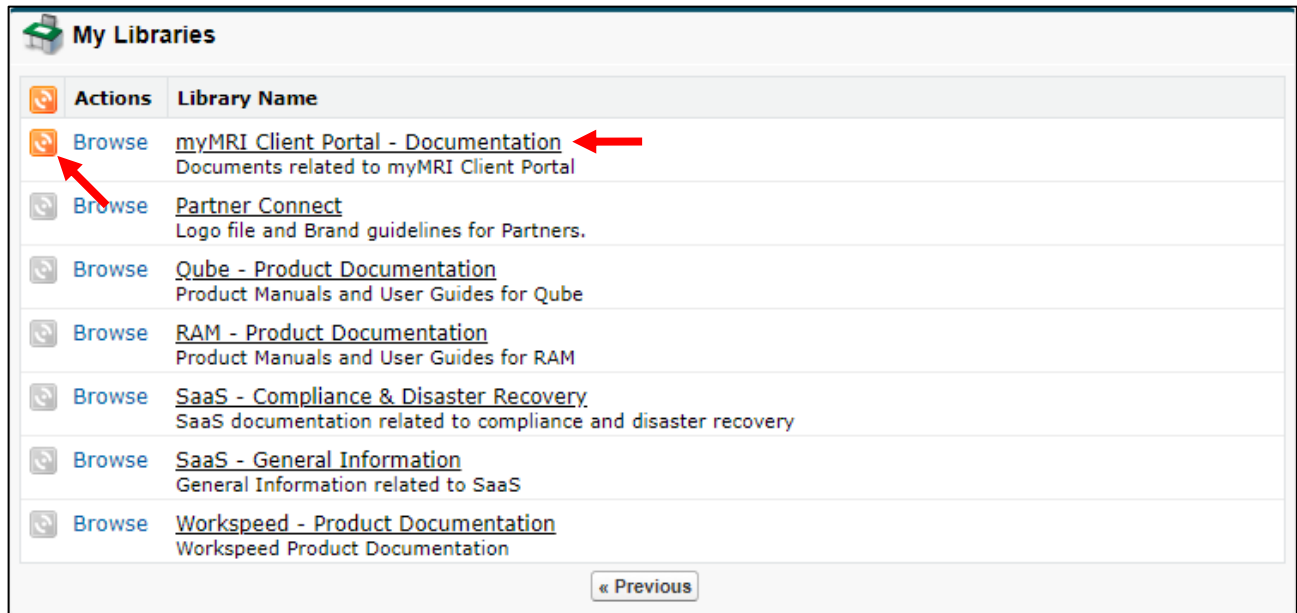
To access **Documentation**, click the **DOCUMENTATION** button on the myMRI home page.



Libraries

Documents are arranged in *libraries*, which group similar or related items together. You can subscribe to libraries to be notified of any changes in content. Follow these steps to work with libraries and their documents:

- 1 The **My Libraries** panel is the first panel on the **Documentation** home page. To subscribe to a library, click the gray icon to the left of the library's name. The icon will turn orange to indicate you are subscribed. To unsubscribe, click the icon again, and it will return to gray. To view the documents contained within a library, select the library's name link.












- 2 The most recent documents in the library (top content) are displayed. To download or subscribe to a document, select the document's name link.

i You can also download the document directly from this panel by clicking on the red PDF icon to the left of the document's name. It will open in your PDF viewer, where you can print or save it.

Subscribed

Browse Documents related to myMRI Client Portal



Top Content Category: Publication Date

Title	Publication Date
 myMRI Client Portal User Guide	3 weeks ago
 MRI Global Client Support Policy	4/24/2018
 Add/Change Request Form - Administrator/Designated Support Contact (DSC)	2/26/2018
 Legal Terms of Use myMRI Client Portal	10/14/2015
 Version X Welcome Packet	7/30/2015
 Global Client Support Phone Tree	7/30/2015
 Global Client Support Case Escalation Process	7/30/2015
 MRI Holiday Schedule	7/30/2015
 What is new on the myMRI Client Portal	5/4/2015

Show All

- 3 Document details are displayed. To be notified of any changes to the document, you can subscribe to it by clicking the **Subscribe** button. Its icon will turn orange to indicate you are subscribed. To unsubscribe, click the button again, and the icon will return to gray. To download the document, click the **Download** button. The document will open in your PDF viewer, where you can print or save it.

Content Details

0 0  Download  Subscribed

myMRI Client Portal User Guide

Tags [myMRI Client Portal](#)

Created 7/30/2015

Version 4 - added 3 weeks ago

Featured

Size 2.4 MB

In My Libraries [myMRI Client Portal - Docum...](#)

Preview Comments Subscribers

You must enable or download Adobe Flash Player version 9.0.115 or later to use this feature.

[Download Adobe Flash Player](#)

- 4 To search for a document within the library, go back to the document list and click either the **Browse** button at the top or the **Show All** button at the bottom.

Subscribed

Browse Documents related to myMRI Client Portal

Top Content Category: Publication Date ▼

Title	Publication Date
myMRI Client Portal User Guide	3 weeks ago
MRI Global Client Support Policy	4/24/2018
Add/Change Request Form - Administrator/Designated Support Contact (DSC)	2/26/2018
Legal Terms of Use myMRI Client Portal	10/14/2015
Version X Welcome Packet	7/30/2015
Global Client Support Phone Tree	7/30/2015
Global Client Support Case Escalation Process	7/30/2015
MRI Holiday Schedule	7/30/2015
What is new on the myMRI Client Portal	5/4/2015

Show All

- 5 Enter a keyword or phrase in the search box, then click the **Go!** button. Matching documents are displayed. To view a document's details, download it or subscribe to it, select the document's name link. You will be taken to the same screen shown in step 3.

*i You can also (a) download a document directly from this panel by clicking on the red PDF icon, (b) subscribe to a document by clicking on the gray icon, and (c) download multiple documents at once by checking the box beside the desired documents and then clicking the **Download** button.*

Content

Search for Content

« Back

Search in myMRI Client Portal - D... ▼ for **Go!** Clear Search

Search Results: Showing 1-2 of 2 results

Related Tag Searches: myMRI Client Portal

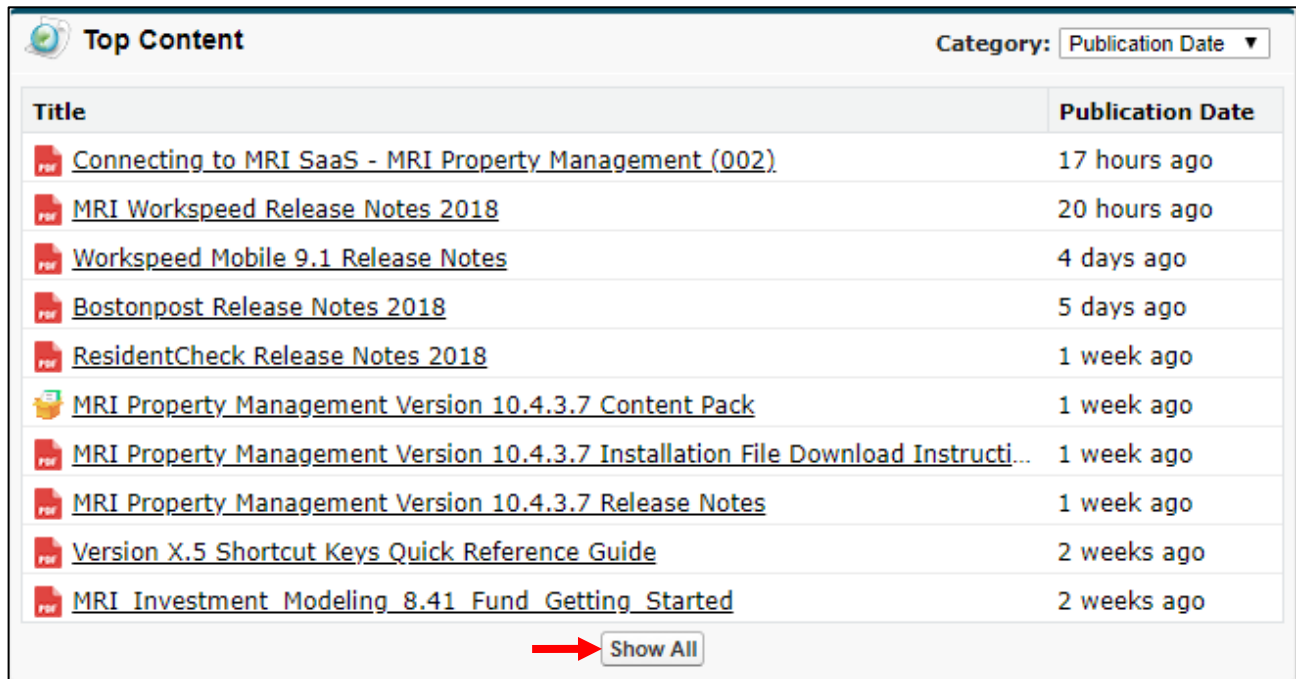
Download **Display Options**

<input type="checkbox"/>	Title	Size	Last Modified	Downloads
<input type="checkbox"/>	myMRI Client Portal User Guide	2.4 MB	3 weeks ago	<div style="width: 100%;"></div>
<input type="checkbox"/>	MRI Global Client Support Policy	204 KB	4/24/2018	<div style="width: 100%;"></div>

Individual Documents

You can bypass the libraries and search all documents in the repository.

- 1 On the **Documentation** home page, scroll down to the last panel named **Top Content**. The most recent documents in the repository are displayed. Click the **Show All** button at the bottom.



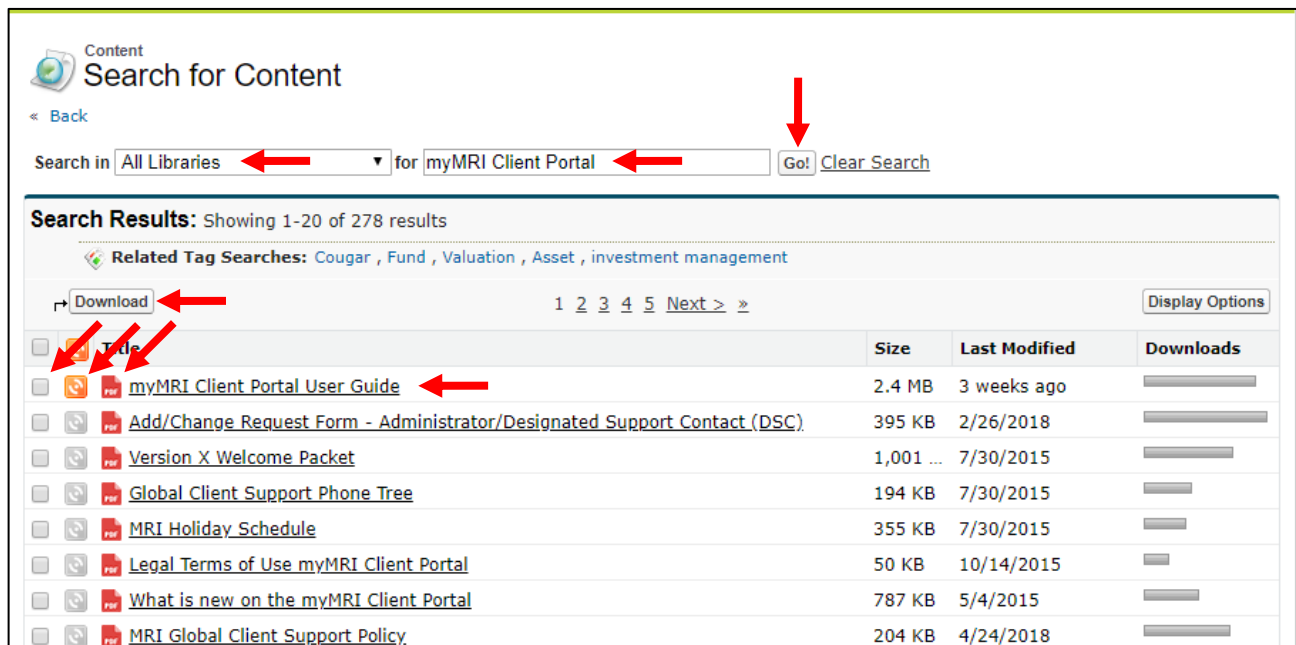
The screenshot shows the 'Top Content' panel with a 'Category: Publication Date' dropdown. The list of documents includes:

Title	Publication Date
Connecting to MRI SaaS - MRI Property Management (002)	17 hours ago
MRI Workspeed Release Notes 2018	20 hours ago
Workspeed Mobile 9.1 Release Notes	4 days ago
Bostonpost Release Notes 2018	5 days ago
ResidentCheck Release Notes 2018	1 week ago
MRI Property Management Version 10.4.3.7 Content Pack	1 week ago
MRI Property Management Version 10.4.3.7 Installation File Download Instructi...	1 week ago
MRI Property Management Version 10.4.3.7 Release Notes	1 week ago
Version X.5 Shortcut Keys Quick Reference Guide	2 weeks ago
MRI Investment Modeling 8.41 Fund Getting Started	2 weeks ago

A red arrow points to the 'Show All' button at the bottom of the list.

- 2 In the **Search in** field, make sure *All Libraries* is selected. Then enter a keyword or phrase in the search box and click the **Go!** button. Matching documents are displayed. To view a document's details, download it or subscribe to it, select the document's name link.

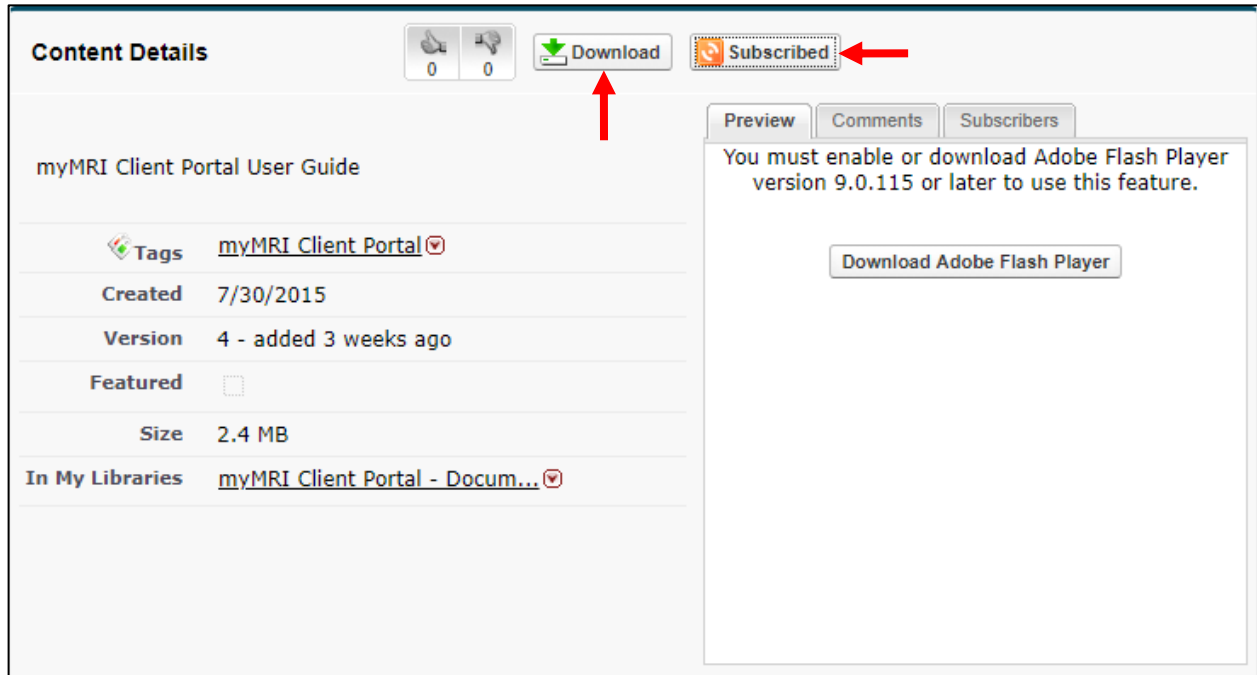
i You can also (a) download a document directly from this panel by clicking on the red PDF icon, (b) subscribe to a document by clicking on the gray icon, and (c) download multiple documents at once by checking the box beside the desired documents and then clicking the **Download** button.



The screenshot shows the 'Search for Content' page with the search criteria 'All Libraries' and 'myMRI Client Portal'. The search results show 1-20 of 278 results. The first result is 'myMRI Client Portal User Guide' (2.4 MB, 3 weeks ago). Red arrows point to the 'Download' button, the 'Go!' button, and the 'Download' icon for the first result.

Download	Title	Size	Last Modified	Downloads
<input type="checkbox"/>	myMRI Client Portal User Guide	2.4 MB	3 weeks ago	
<input type="checkbox"/>	Add/Change Request Form - Administrator/Designated Support Contact (DSC)	395 KB	2/26/2018	
<input type="checkbox"/>	Version X Welcome Packet	1,001 ...	7/30/2015	
<input type="checkbox"/>	Global Client Support Phone Tree	194 KB	7/30/2015	
<input type="checkbox"/>	MRI Holiday Schedule	355 KB	7/30/2015	
<input type="checkbox"/>	Legal Terms of Use myMRI Client Portal	50 KB	10/14/2015	
<input type="checkbox"/>	What is new on the myMRI Client Portal	787 KB	5/4/2015	
<input type="checkbox"/>	MRI Global Client Support Policy	204 KB	4/24/2018	

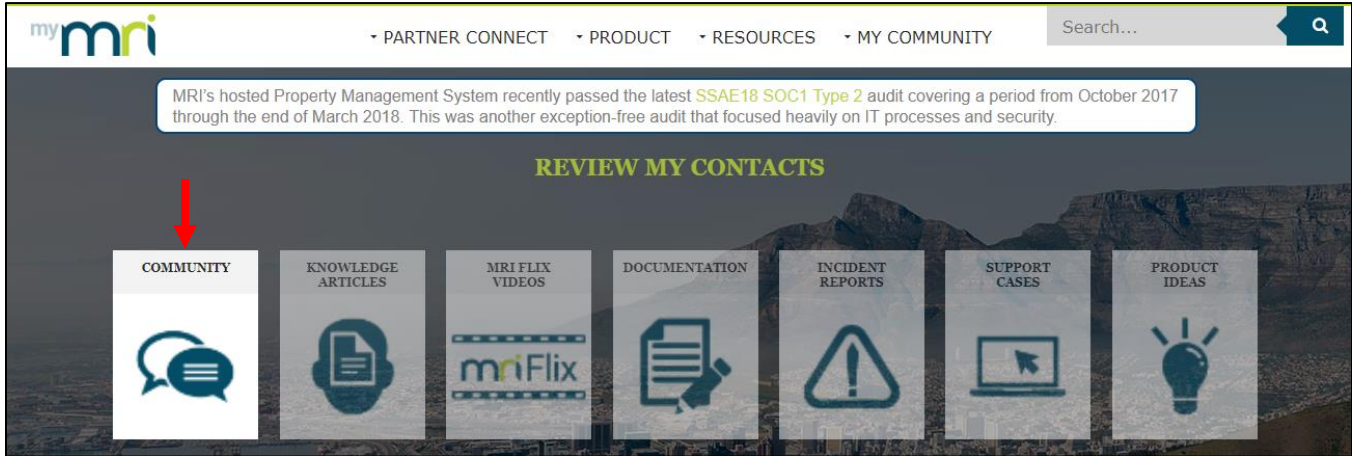
- 3 Document details are displayed. To be notified of any changes to the document, you can subscribe to it by clicking the **Subscribe** button. Its icon will turn orange to indicate you are subscribed. To unsubscribe, click the button again, and the icon will return to gray. To download the document, click the **Download** button. The document will open in your PDF viewer, where you can print or save it.



Community

The **Community** resource is an online forum through which you can review, post and answer questions submitted by your agency and other agencies.

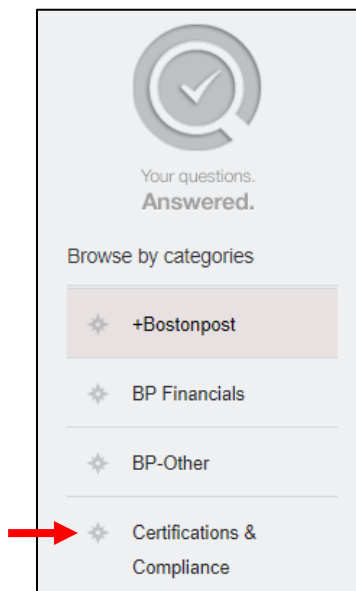
To access **Community**, click the **COMMUNITY** button on the myMRI home page.



Next, you should always select a zone before starting. A *zone* represents a specific software or category. Select the **Zone** menu, then select the desired zone from the drop-down list.




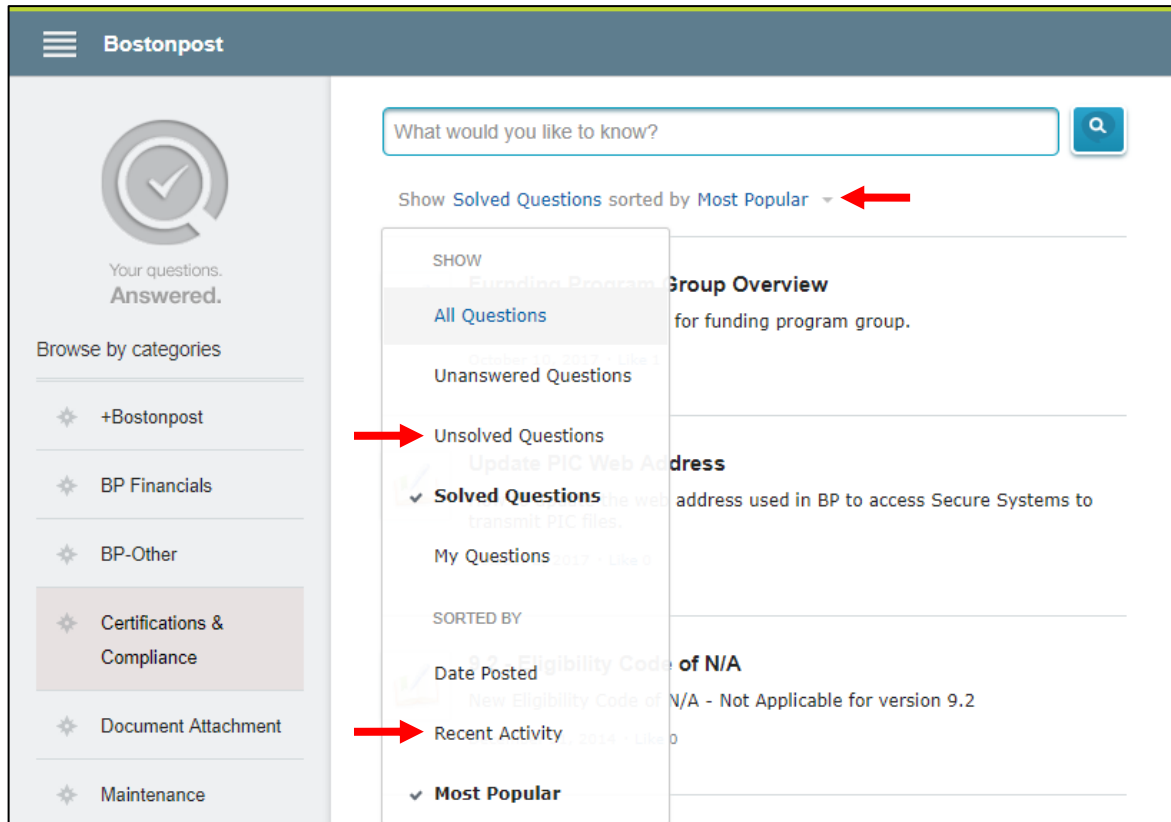
Finally, categories for the zone are displayed along the left. Select a desired category.



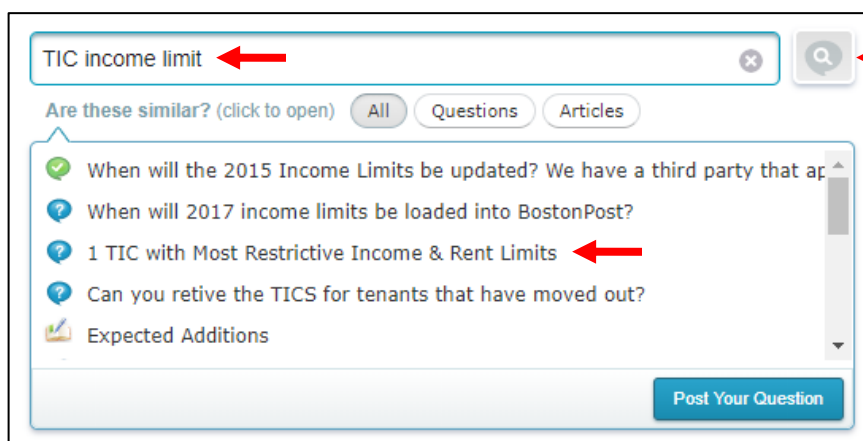
Review & Answer Questions

- 1 By default, the **Community** home page displays solved questions for the chosen zone and category, sorted by most popular. You can change the filter to show the following questions within the zone and category:
- **All** – All questions that have ever been posted.
 - **Unanswered** – Questions to which no community user has posted an answer.
 - **Unsolved** – Questions which have not been reviewed and solved by MRI.
 - **Solved** – Questions which MRI has reviewed and solved. These usually contain references to published knowledge articles.
 - **My Questions** – Questions which *you* have posted.

You can also change the list to sort by date posted or recent activity. To change how the list is filtered and sorted, click the  button to the right of the filter at the top, then choose the desired options.



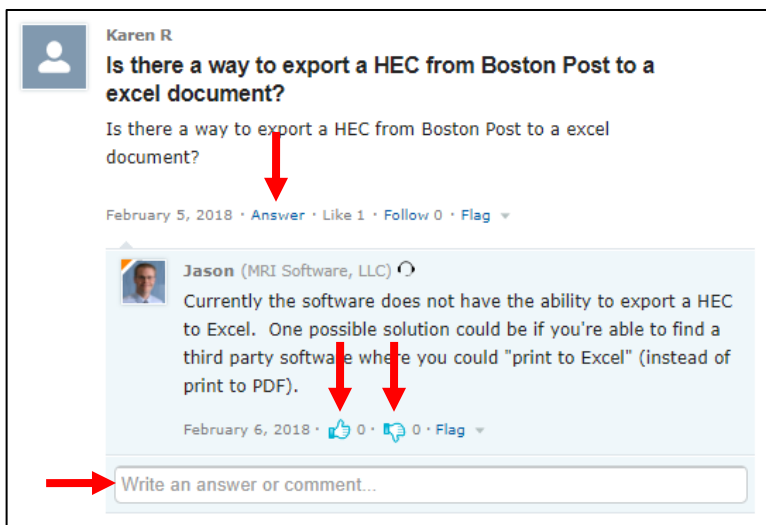
- 2 You can also search for questions within the chosen zone and category by entering a keyword or phrase in the search box at the top, and then clicking the magnifying glass icon to the right. A drop-down list of matching questions will be displayed. Select a question to view it.



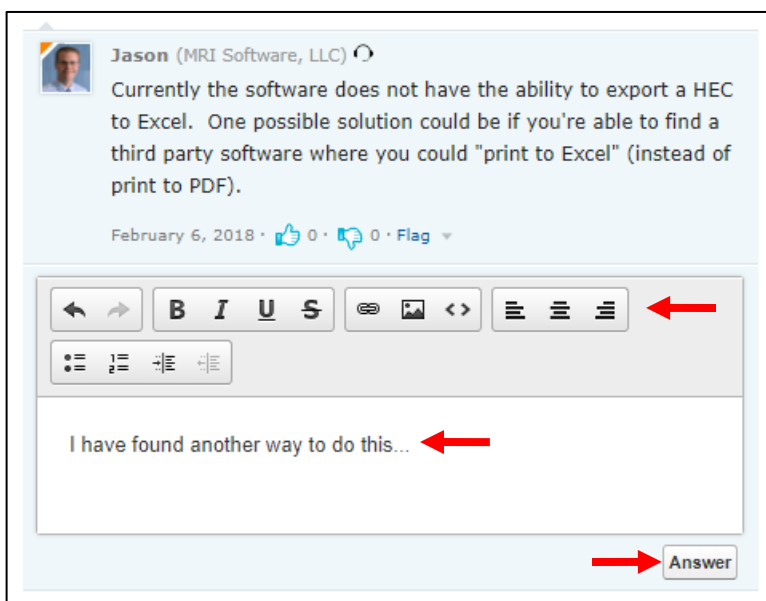
- 3 Below is a sample question. To like the question, select the **Like** link. To follow the question to receive email updates on it, select the **Follow** link. (Select the link again to unfollow it.) If answers have been posted to the question, select the **Show answers** link to view them.



- 4 Answers are displayed below the question. You can like or dislike an answer by clicking the thumbs up and thumbs down icons. To post your own answer to the question, either select the **Answer** link or click inside the **Write an answer or comment...** box.

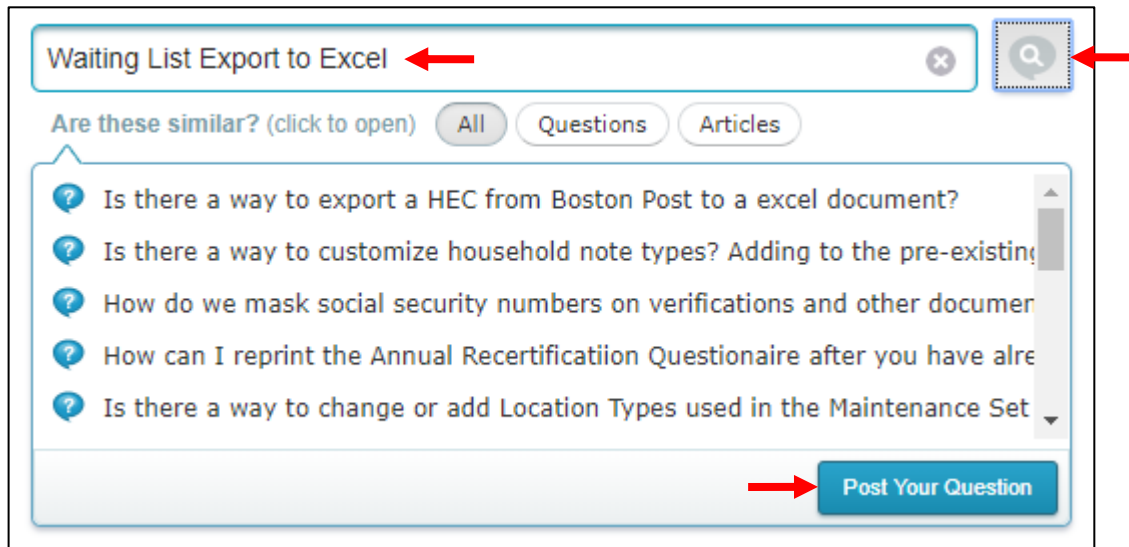


- 5 Enter your answer in the box, then click the **Answer** button to post it. Note that you can format your text, insert hyperlinks and attach images using the toolbar.

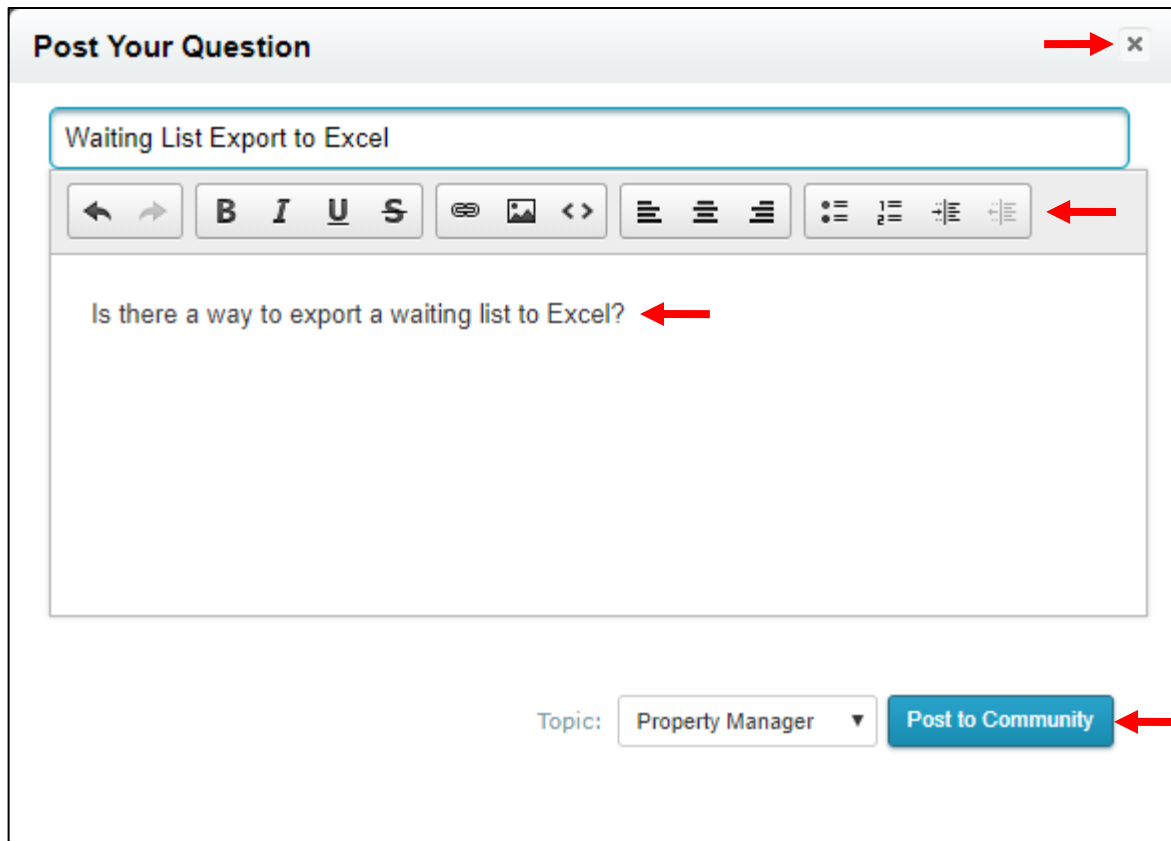


Post A Question

- 1 Once you have chosen a desired zone and category, search to see if your question has already been asked by entering a keyword or phrase in the search box at the top, and then clicking the magnifying glass icon. A drop-down list of matching questions will appear. If you do not find a match, click the **Post Your Question** button.



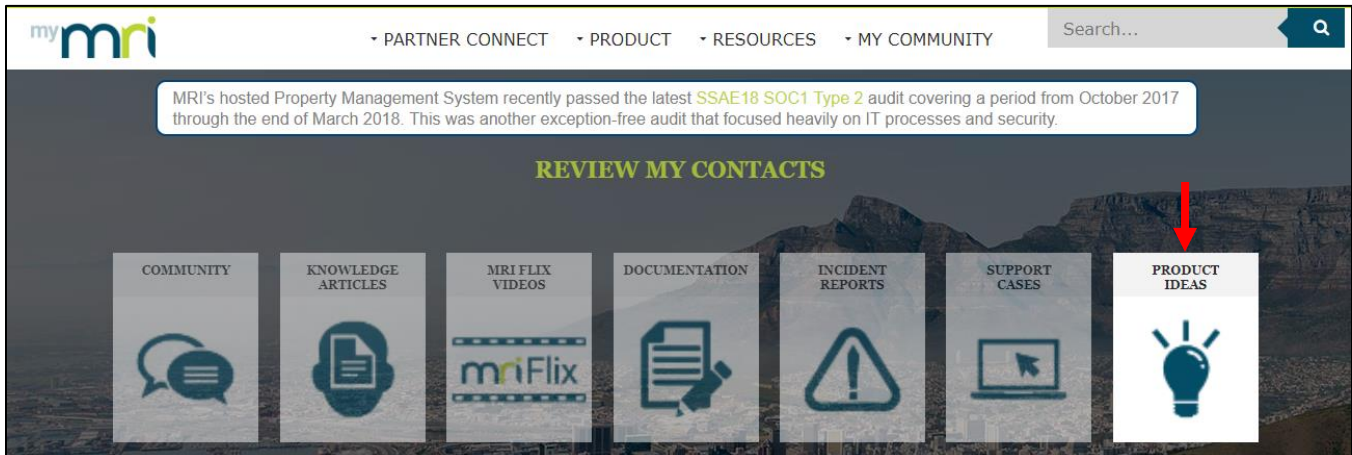
- 2 Enter a detailed question in the box. Note that you can format your text, insert hyperlinks and attach images using the toolbar. When finished, click the **Post to Community** button to post your question, or click the **X** button in the upper right corner to cancel it.



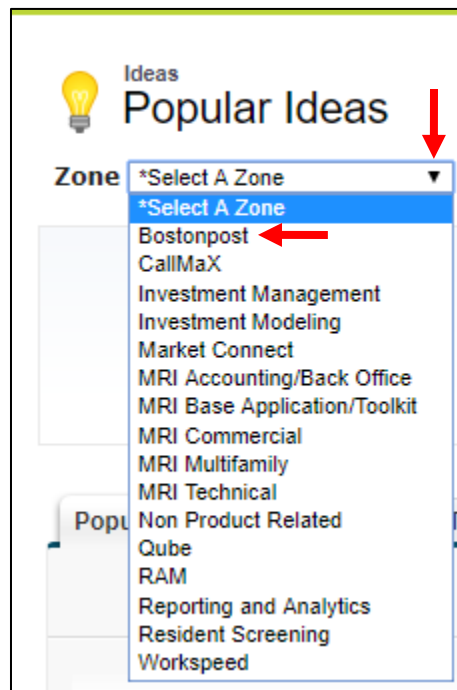
Product Ideas

MRI values your input and wants to hear your ideas for future product enhancements. Using the **Product Ideas** resource, you can propose product ideas, vote on ideas from other users, and provide feedback through comments. All ideas are reviewed by MRI's Product Management Team.

To access **Product Ideas**, click the **PRODUCT IDEAS** button on the myMRI home page.



Next, you must select a zone. A *zone* represents a specific software or category. Select the desired **Zone** from the drop-down list to get started.



Review & Vote/Comment On Ideas

- 1 The **Product Ideas** home page groups ideas for the chosen zone under 4 tabs: **Popular Ideas**, **Recent Ideas**, **Top All-Time** ideas, and ideas which have attached **Comments**. Select the desired tab. You can also filter the listings by **Category** and **Status**.

The screenshot shows the top navigation area of the Product Ideas page. There are four tabs: "Popular Ideas", "Recent Ideas", "Top All-Time", and "Comments". The "Comments" tab is selected, indicated by a red arrow. Below the tabs is a "Post Idea" button and two dropdown menus: "Category: All" and "Status: All", both with red arrows pointing to them.

- 2 Each idea has a brief title and a detailed description. The current status of the idea is highlighted in yellow to the right of its title. To promote or demote the idea, click the **promote** or **demote** button. Promotion adds 10 points to the idea's total point value, and demotion subtracts 10 points from it.

The screenshot shows a single idea card. The title is "Reasonable Accommodations - Need to be able to process for Applicants" with a yellow "Under Review" status tag to its right. Below the title are two buttons: "promote" and "demote". Red arrows point to both buttons. The idea has "60 Points" displayed below the buttons. The description text is visible below the buttons.

- 3 The number of comments attached to an idea is displayed below its description. To view comments or post your own comment, select either the idea's title or the **Comments** link.

The screenshot shows another idea card. The title is "Adding receivables with a due date" with a yellow "Submitted" status tag. Below the title are "promote" and "demote" buttons. The idea has "10 Points" displayed below the buttons. Below the points, there is a link that says "1 Comment" with a red arrow pointing to it. The description text is visible below the buttons.

- 4 Details of the idea, including its **Tracking Number**, are displayed in the **Idea Detail** panel at the top. A tracking number is a unique number assigned to each idea and used for reference and reporting purposes.

The screenshot shows the "Idea Detail" panel. It contains the same idea card as in the previous screenshot. Below the idea card, there is a section titled "Additional Information" which displays the "Tracking Number" as "004016". A red arrow points to the tracking number.

- 5 Below the details are comments that have been attached to the idea. You can like a comment by selecting the **Like** link.



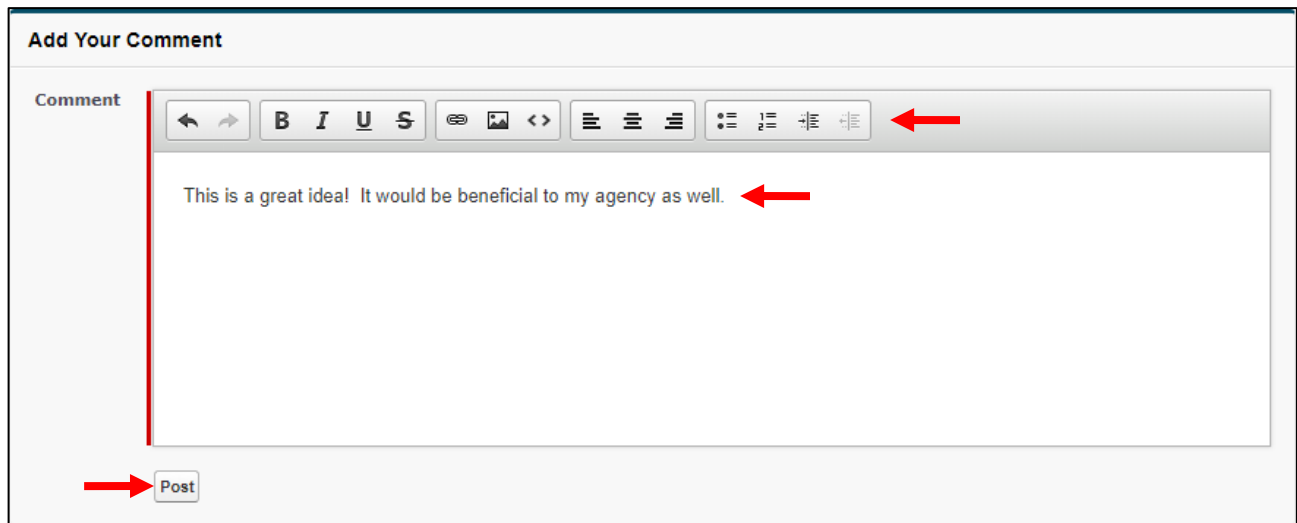
Comments **Add Your Comment**

 **matthew.maguire1.3219108606398652E12** 5/25/2018 10:08 AM

Hi Brandi, thanks for the Idea.
Currently in BP you can apply payments to future SCHEDULED charges by using the "Prepayment" option when entering payments in a batch. Additionally you can add receivables with a future due date (charge date) either in bulk or individually on the household level by simply putting the "Charge Date" in the future.
Thank You,
Matthew


 [Like](#)

- 6 To post your own comment, scroll down to the **Add Your Comment** panel, enter your comment in the box, then click the **Post** button. Note that you can format your text, insert hyperlinks and attach images using the toolbar.




Add Your Comment

Comment

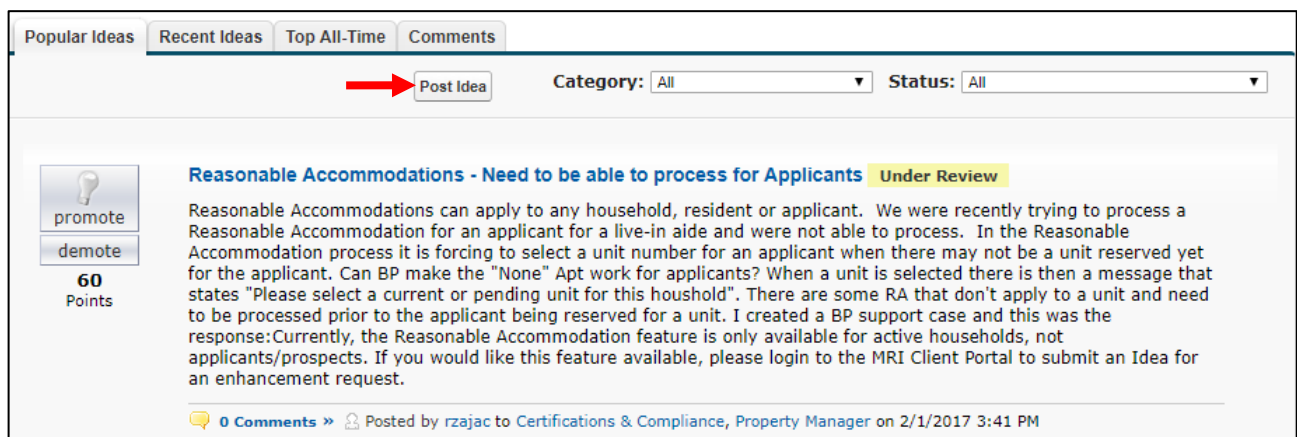


This is a great idea! It would be beneficial to my agency as well.





Post An Idea

- 1 Once you have selected a zone, click the **Post Idea** button below the tabs on the **Product Ideas** home page.





Popular Ideas **Recent Ideas** Top All-Time Comments

 **Category:** All **Status:** All

 promote
demote
60
Points



Reasonable Accommodations - Need to be able to process for Applicants Under Review

Reasonable Accommodations can apply to any household, resident or applicant. We were recently trying to process a Reasonable Accommodation for an applicant for a live-in aide and were not able to process. In the Reasonable Accommodation process it is forcing to select a unit number for an applicant when there may not be a unit reserved yet for the applicant. Can BP make the "None" Apt work for applicants? When a unit is selected there is then a message that states "Please select a current or pending unit for this household". There are some RA that don't apply to a unit and need to be processed prior to the applicant being reserved for a unit. I created a BP support case and this was the response: Currently, the Reasonable Accommodation feature is only available for active households, not applicants/prospects. If you would like this feature available, please login to the MRI Client Portal to submit an Idea for an enhancement request.

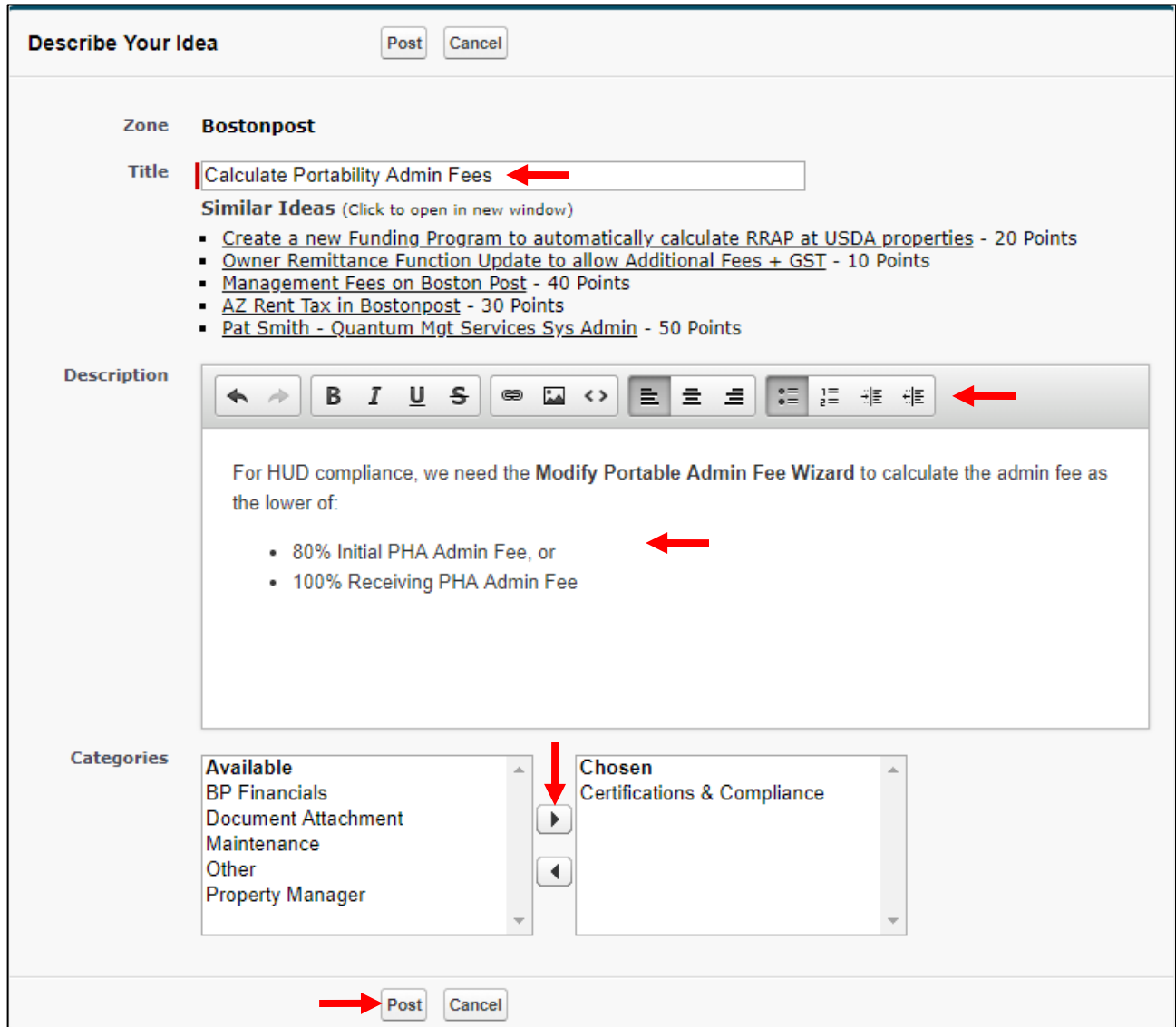
 **0 Comments** »  Posted by rzajac to Certifications & Compliance, Property Manager on 2/1/2017 3:41 PM

2 Enter a brief **Title** and a detailed **Description** for your idea. Note that you can format your text, insert hyperlinks and attach images using the toolbar.

i After you enter the **Title**, myMRI checks for any other ideas containing the same keywords. If you see your idea already listed under **Similar Ideas**, there is no need to post it again.

Then choose one or more **Categories** to which the idea applies. To do this, select the category in the **Available** box and click the  button to move it to the **Chosen** box. To remove a category chosen by mistake, select the category in the **Chosen** box and click the  button to move it back to the **Available** box.

When finished, click the  button.



Describe Your Idea

Zone **Bostonpost**

Title

Similar Ideas (Click to open in new window)

- [Create a new Funding Program to automatically calculate RRAP at USDA properties](#) - 20 Points
- [Owner Remittance Function Update to allow Additional Fees + GST](#) - 10 Points
- [Management Fees on Boston Post](#) - 40 Points
- [AZ Rent Tax in Bostonpost](#) - 30 Points
- [Pat Smith - Quantum Mgt Services Sys Admin](#) - 50 Points

Description

For HUD compliance, we need the **Modify Portable Admin Fee Wizard** to calculate the admin fee as the lower of:

- 80% Initial PHA Admin Fee, or
- 100% Receiving PHA Admin Fee

Categories

Available	Chosen
BP Financials	Certifications & Compliance
Document Attachment	
Maintenance	
Other	
Property Manager	

3 An email will be sent to the appropriate MRI teams based upon the chosen categories. Your idea is now visible to all myMRI users across all agencies.

Appendix: Support Case Information Needed

Use the index below to find topics for common cases. Topics are grouped by categories and sub-categories.

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Existing Client Migration Homework

- Who is your migration coach?
- What homework assignment is this?
- What questions do you have about the homework assignment?

General Support ► Accounting ► Accounts Payable ► Accruing Invoices

- What are you having trouble doing? (Choose all that apply.)
 - Adding an invoice*
 - Editing an invoice*
 - Deleting an invoice*
- How was the invoice created? (Choose one.)
 - From a purchase order*
 - From a recurring template*
- Are you having an issue accruing invoices?
- Do you want to know how accruals work?
- Do you want to turn accruals off or on? (Choose one.)
 - Off*
 - On*
- Are you trying to balance your accruals in AP to GL? If so:
 - What date range are you looking at?
 - What General Ledger account number are you accruing to?
 - If you're comparing certain reports, attach a copy of what you are comparing.
- How are you performing accruals? (Choose one.)
 - Allowing the system to accrue automatically*
 - Manually clicking on the accrual button*
- Are you receiving an error message in check process about an invoice?
 - If so, what is the error, or which invoice and vendor does the system say needs to be corrected?
- Did all your checks print with the correct check numbers? If not:
 - Did any checks get printed on?
 - If so, what check did you start with?
 - Do you need all of your checks reset?
 - If so, what check do you want to start with?
 - If not, what check numbers were printed on?
 - What check numbers are voided?

General Support ► Accounting ► Accounts Payable ► Bank Account Setup

- Has the bank account been set up? If not, provide the following:
 - Ledger cash account number
 - AP accrual account number
 - Bank account ID
 - Bank account description
- Will you need to setup for direct deposit (ACH)? If so:
 - What is the bank name?
 - What is the bank's layout of the file?
 - What is the deadline for setup?

General Support ► Accounting ► Accounts Payable ► Check Formatting

- Do you need to create a check formatting from the existing formatting?
 - If so, attach a scanned copy of a sample check.
 - If not, would you like to copy the check formatting from an existing setup? If so:
 - What bank account are you copying from?
 - What is the new account to be copied to?

General Support ► Accounting ► Accounts Payable ► Check Processing

- Are you stuck in the print check process? If so:
 - Did any checks get printed on?
 - If so, what check did you start with?
 - Do you need all of your checks reset?
 - If so, what check do you want to start with?
 - If not, what check numbers were printed on?
 - What check numbers are voided?
- Did you post checks but the check numbers are incorrect?
 - If so, attach a check listing report showing the existing checks and put the correct number next to them.
 - **NOTE:** There may be a charge to correct these check numbers.

General Support ► Accounting ► Accounts Payable ► Vendor

- Are there other modules associated with this issue?
 - If so, what is the module? (Choose all that apply.)
 - PO*
 - TAR*
 - GL*
 - Other*
 - If other, please describe.
- Were you adding a new vendor?
 - If so, how were you adding it? (Choose one.)
 - Directly into AP*
 - From TAR*
 - If directly into AP:
 - What is the vendor type?
 - What should your next vendor number be for this type?
- Is this a missing vendor? If so,
 - What is the vendor name?
 - On what date was the vendor last paid?

General Support ► Accounting ► Check Reconciliation

- What is the name of the bank account?
- What is the date?
- What is the check number?
- What is the name of the vendor/payee?
- Has the check cleared?
- Are you importing from a spreadsheet?
- Are you having an issue with a Report?
 - If so, what information is needed or missing?

General Support ► Accounting ► General Ledger

- What are you trying to do? (Choose one.)
 - Post entries*
 - Add an account*
 - Add a fund*
 - Run a report*
 - If posting entries, what is the batch number?
 - If adding an account, what the account number? Or do you want to copy all accounts?
 - If adding a fund:
 - What is the fund number?
 - Do you still need assistance setting up any of the following? (Choose all that apply.)
 - Interfunds*

Allocations
Check format

- ▶ If running a report, what is the name of the report and from where are you running it?

General Support ▶ Accounting ▶ Payroll ▶ Employee

- Were you adding a new employee?
- Were you re-instating an old employee?
 - ▶ If so, what is the employee's name and SSN?
- Are you receiving an error message when you try to add compensation or deductions?
 - ▶ If so, attach a screenshot of the message.
- Are you receiving an error when you try to add a manual check?
 - ▶ If so, attach a screenshot of the message.

General Support ▶ Accounting ▶ Payroll ▶ Leave

- Are you setting up the system to accrue leave? If so:
 - ▶ Who accrues leave?
 - ▶ How often is leave accrued?
 - ▶ Does everyone receive the same amount of leave?
 - ▶ What is leave accrual based on? (Choose one.)
 - The number of years an employee has worked at the agency*
 - When the employee became full-time*
 - ▶ Attach a documented scale at which employees accrue leave.
- Are you having issues with existing leave on an employee or a report? If so:
 - ▶ Which employee, screen, and/or report is showing leave incorrectly?
 - ▶ Are there specific dates that are incorrect?
 - If so, what are those dates?

General Support ▶ Accounting ▶ Purchase Orders

- What are you having an issue with? (Choose one.)
 - Requisition*
 - Quote*
 - Purchase order*
 - Blanket purchase order*
 - ▶ If requisition, what is the requisition number and what are you trying to do?
 - ▶ If quote, what is the quote number and what are you trying to do?
 - ▶ If purchase order, what is the purchase order number and what are you trying to do?
 - ▶ If blanket purchase order, what is the blanket purchase order number and what are you trying to do?
- Were you trying to print a report?
 - ▶ If so, what is the name of the report?

General Support ▶ Housing ▶ Applicant List

- What Waiting List are you working with/having trouble with?
- Is it for an individual or a group of people on the list? (Choose one.)
 - Individual person*
 - Group of people*
- Is it about an issue for an existing applicant?
 - ▶ If so, what does it regard? (Choose one.)
 - Adding a person to the list*
 - Adding preferences or something to do with the household*
 - Purge process*
 - Creating letters*
 - If creating letters, what are they for? (Choose all that apply.)
 - Applicants*

Setup waiting list
Income limit table waiting lists
Code preferences
Applicant – waiting list applied for
Applicant – name
Application date associated with item

General Support ► Housing ► Family Self-Sufficiency (FSS)

- What is the subsidy type? (Choose one.)
 - PH*
 - S8*
 - TRACS*
 - RAD*
- What is the name of the Participant?
- Is this a new Participant?
 - If so, will they need an enrollment?
 - If not:
 - Is the issue dealing with? (Choose one.)
 - Escrow balance*
 - Month credit*
 - Earned income*
 - TTP*
 - What is the participant entitled to? (Choose one.)
 - Disbursement*
 - Forfeiture*
 - If this is regarding an addendum, what type is it? (Choose one.)
 - Enrollment*
 - Progress*
 - Exit*

General Support ► Housing ► Multi-Family (TRACS)/Tax Credit ► Affordable Housing

- What program are you working in?
- What is the subsidy type? (Choose all that apply.)
 - S8*
 - S-811 PRAC*
 - S-236*
 - 50202 PRAC*
 - BMIR*
 - Tax Credit*
 - Rural Development*
 - Market Rent*
- Is this related to Tenants Account Receivable (TAR)?
- Is this related to voucher process?
 - If so, what is it related to? (Choose all the apply.)
 - Repayment agreement*
 - Special claims*
 - Adjustments*
 - Miscellaneous adjustments*
- Is this related to Submissions?
 - If so, what type of submission? (Choose all that apply.)
 - Tenant*
 - Voucher*
- Is this related to contract administrator issues?

- ▶ If so, are you receiving an error message?
 - If so, attach a screenshot of the message.
- Is this a dual subsidy unit? If so:
 - ▶ Are you getting a default transaction type error?
 - ▶ Are you getting an error for the assistance provider?
 - ▶ Is this unit listed under the correct development/project?
 - ▶ Did you get a submission error (Basic Realm 400 error)?
 - ▶ Do you have your Rules of Behavior signed?
 - ▶ Have you signed on to Secure System to make sure your M number works?

General Support ▶ Housing ▶ Multi-Family (TRACS)/Tax Credit ▶ Multi-Family (TRACS)

- What program are you working in?
- What is the subsidy type? (Choose all that apply.)
 - S8*
 - S-811 PRAC*
 - S-236*
 - 50202 PRAC*
 - BMIR*
 - Tax Credit*
 - Rural Development*
 - Market Rent*
- Is this related to Tenants Account Receivable (TAR)?
- Is this related to voucher process?
 - ▶ If so, what is it related to? (Choose all the apply.)
 - Repayment agreement*
 - Special claims*
 - Adjustments*
 - Miscellaneous adjustments*
- Is this related to Submissions?
 - ▶ If so, what type of submission? (Choose all that apply.)
 - Tenant*
 - Voucher*
- Is this related to contract administrator issues?
 - ▶ If so, are you receiving an error message?
 - If so, attach a screenshot of the message.
- Is this Rural Development?
 - ▶ If so, is this a MINC submission?
- Is this related to Tax Credit?
 - ▶ If so, what is the unit number?
- Is this a dual subsidy unit?

General Support ▶ Housing ▶ Multi-Family (TRACS)/Tax Credit ▶ Tax Credit

- What program are you working in?
- What is the subsidy type? (Choose all that apply.)
 - S8*
 - S-811 PRAC*
 - S-236*
 - 50202 PRAC*
 - BMIR*
 - Tax Credit*
 - Rural Development*
 - Market Rent*
- Is this related to Tenants Account Receivable (TAR)?

- Is this related to Tax Credit?
 - ▶ If so, what is the unit number?
- Is this a dual subsidy unit? If so:
 - ▶ Are you getting a default transaction type error?
 - ▶ Are you getting an error for the assistance provider?
 - ▶ Is this unit listed under the correct development/project?
 - ▶ Did you get a submission error (Basic Realm 400 error)?
 - ▶ Do you have your Rules of Behavior signed?
 - ▶ Have you signed on to Secure System to make sure your M number works?

General Support ▶ Housing ▶ Occupancy & Rent Calculation (ORC)

- Did you get an error message during initialization? If so:
 - ▶ What was the error?
 - ▶ At what point did the process stop?
- Were you generating transactions for the month? If so:
 - ▶ What development were you doing?
 - ▶ What is the effective date you were using?
- Did the process stop during the wizard?
 - ▶ If so, did the process stop when you were trying to print a report?
 - If so, what was the report? (Choose one.)
 - Register Report*
 - Monthly Transactions Prepare Report*
 - ORC Changes Report*

General Support ▶ Housing ▶ Other

- What program are you working in?
- What is the subsidy type? (Choose all that apply.)
 - S8*
 - S-811 PRAC*
 - S-236*
 - 50202 PRAC*
 - BMIR*
 - Tax Credit*
 - Rural Development*
 - Market Rent*
- Is this related to Tenants Account Receivable (TAR)?
- Is this Rural Development?
 - ▶ If so, is this a MINC submission?
- Is this a dual subsidy unit? If so:
 - ▶ Are you getting a default transaction type error?
 - ▶ Are you getting an error for the assistance provider?
 - ▶ Is this unit listed under the correct development/project?
 - ▶ Did you get a submission error (Basic Realm 400 error)?
 - ▶ Do you have your Rules of Behavior signed?
 - ▶ Have you signed on to Secure System to make sure your M number works?
- Is this a dual subsidy unit? If so:
 - ▶ Are you getting a default transaction type error?
 - ▶ Are you getting an error for the assistance provider?
 - ▶ Is this unit listed under the correct development/project?
 - ▶ Did you get a submission error (Basic Realm 400 error)?
 - ▶ Do you have your Rules of Behavior signed?
 - ▶ Have you signed on to Secure System to make sure your M number works?

General Support ► Housing ► Section 8 Tenant & Landlord ► Accounts/Payments

- What is the subsidy type? (Choose one.)
 - Housing Choice Voucher (HCV)*
 - Project Based Voucher (PBV)*
 - Home Ownership*
 - Dual Subsidy*
- What are the names of owners/tenants associated with the payment or transaction?
- What is the transaction date of the payment?
- What is the account number?

General Support ► Housing ► Section 8 Tenant & Landlord ► Batch Processing

- What is the subsidy type? (Choose all that apply.)
 - Housing Choice Voucher (HCV)*
 - Project Based Voucher (PBV)*
 - Home Ownership*
 - Dual Subsidy*
- What type of batch process are you doing?
- What is the effective date or date range of the batch process?
- What are the tenant name(s) associated with the batch process?
- What is the batch ID generated, if any?

General Support ► Housing ► Section 8 Tenant & Landlord ► Certification

- Are you doing a certification in WinTen? If so:
 - Who is the tenant?
 - What data area are you working in?
 - What is the effective date?
 - Is the rent incorrect?
- What is the subsidy type? (Choose all that apply.)
 - Housing Choice Voucher (HCV)*
 - Project Based Voucher (PBV)*
 - Public Housing*
 - Affordable Housing (Multi-Family, Rural Development, Tax Credit)*
 - Other*
 - If other, please describe.
- Is this an issue with a unit that is tied to the certification?
 - If so, what is the unit number?

General Support ► Housing ► Section 8 Tenant & Landlord ► Initialization/Check Run

- What is the subsidy type? (Choose all that apply.)
 - Housing Choice Voucher (HCV)*
 - Project Based Voucher (PBV)*
 - Home Ownership*
 - Dual Subsidy*
- What is the check date?
- What kind of process is this? (Choose one.)
 - Mid-month*
 - Monthly*
- Is this affecting one or multiple tenants/landlords? (Choose one.)
- What are the names of the tenants/landlords, if applicable?
- Should the amount be voided entirely, repaid or N/A? If voided entirely or repaid:
 - What is the check number?
 - What is the amount of the check?

General Support ► Housing ► Section 8 Tenant & Landlord ► Owner/Landlord

- What is the subsidy type? (Choose all that apply.)
 - Housing Choice Voucher (HCV)*
 - Project Based Voucher (PBV)*
 - Home Ownership*
 - Dual Subsidy*
- What is the name of this tenant?
- Where is the report located? (Choose one.)
 - Accounting*
 - Applicant List*
 - Case Management*
 - FSS*
 - Inspections*
 - Occupancy & Rent Calculations (ORC)*
 - Property Security*
 - Section 8 Tenant & Landlord*
 - Setup*
 - Tenant Accounts Receivable (TAR)*
 - Work Orders*
- What is the name of the report?
- What is the date range?
- What are the filters and/or parameters in the report?

General Support ► Housing ► Section 8 Tenant & Landlord ► Portability

- What is the subsidy type? (Choose all that apply.)
 - Housing Choice Voucher (HCV)*
 - Project Based Voucher (PBV)*
 - Home Ownership*
 - Dual Subsidy*
- Is the tenant an incoming port? If so:
 - What is the name of the initiating Housing Authority?
 - What is the name of the tenant?
- Are you absorbing or billing for this tenant? (Choose one.)
 - Absorbing*
 - Billing*
- What is the effective date of the portability contract?
- Should the portability contract be initiated or active? (Choose one.)
 - Initiated*
 - Active*

General Support ► Housing ► Section 8 Tenant & Landlord ► Utility Allowance

- Are you adding a new utility allowance profile? If so:
 - What is the name of the profile?
 - What is the effective date?
 - What is the subsidy type? (Choose all that apply.)
 - Public Housing*
 - Section 8 (HCV)*
 - Tax Credit*
 - Affordable Housing*
 - Other*
 - If other, please describe.
- Does this utility allowance affect anything else?
 - If so, what is the issue specifically for? (Choose all that apply.)

General Support ► Housing ► Section 8 Tenant & Landlord ► Vouchers

- What is the subsidy type? (Choose all that apply.)
 - Housing Choice Voucher (HCV)*
 - Project Based Voucher (PBV)*
 - Home Ownership*
 - Dual Subsidy*
- What is the name of this tenant?
- What project should the voucher be?
- What is the effective voucher start date?
- What is the effective voucher end date?
- What is the bedroom size of the voucher? (Choose a number 1 through 6.)
- What should the voucher status be? (Choose one.)
 - Issued*
 - Leased*
 - Expired*
 - Closed*
 - Searching*
 - Searching in place*
 - Other*
 - If other, please specify the status.

General Support ► Housing ► Tenant Accounts Receivable (TAR)

- Did you do a process in Tenant Lease Management? If so:
 - Who is the Tenant Lease Management tenant?
 - What process were you doing in Tenant Lease Management?
- Did you do a process in Receivables - Payment/Charges? If so:
 - Who is the Receivables tenant?
 - What process were you doing in Receivables?
- Did you do a process in Periodic Processing?
 - If so, what was the process? (Choose all that apply.)
 - Daily process tab*
 - Monthly process*
 - Batch processing*
- Were you working under the Reports button?
 - If so, what were you working on? (Choose all that apply.)
 - Leases*
 - Units*
 - Payments/deposits*
 - Receivable*
 - Listing*
 - PHAS*
 - Registers*
- Were you doing a process under the Legal button?
 - If so, were you adding a new item?
- Were you working in Set Up?
 - If so, what were you working on? (Choose all that apply.)
 - General Settings/Developments/Units*
 - Offices & Accounts*
 - Profiles & Policies*

General Support ► Maintenance ► Consumable Inventory

- What device is this for? (Choose one.)
Desktop
Mobile
- If this is related to a single item, what is the stock number of that item?

General Support ► Maintenance ► Fixed Assets

- What device is this for? (Choose one.)
Desktop
Mobile
 - If mobile and you are a Winten2 user, what is the platform? (Choose one.)
PDA
Windows tablet/laptop
Android
 - If Android, what version of the app are you using? (This is located on the front screen of the app.)
- Is this UPCS or HQS? (Choose one.)
UPCS (PH)
HQS (S8)
- What is the inspection date?
- What is the Unit?
- Who is the tenant being inspected?
- What is the name of the protocol?
- Who is the inspector?

General Support ► Maintenance ► Inspections

- What is the subsidy? (Choose one.)
Public Housing
Section 8
- What device is this for? (Choose one.)
Desktop
Mobile
 - If mobile and you are a Winten2 user, what is the platform? (Choose one.)
PDA
Windows tablet/laptop
Android
 - If Android, what version of the app are you using? (This is located on the front screen of the app.)
- Is this UPCS or HQS? (Choose one.)
UPCS (PH)
HQS (S8)
- What is the inspection date?
- What is the unit?
- Who is the tenant being inspected?
- What is the name of the protocol?
- Who is the inspector?

General Support ► Maintenance ► Meter Reading

- Is this for your desktop or mobile device? (Choose one.)

General Support ► Maintenance ► Preventative Maintenance

- What device is this for? (Choose one.)
Desktop
Mobile
 - If mobile and you are a Winten2 user, what is the platform? (Choose one.)

PDA

Windows tablet/laptop

Android

▪ If Android, what version of the app are you using? (This is located on the front screen of the app.)

- Is this UPCS or HQS? (Choose one.)

UPCS (PH)

HQS (S8)

- What is the inspection date?
- What is the unit?
- Who is the tenant being inspected?
- What is the name of the protocol?
- Who is the inspector?

General Support ► Maintenance ► Work Orders

- What device is this for? (Choose one.)

Desktop

Mobile

► If mobile, what version of the app are you running? (This applies to Winten2 and Winten2+.)

- Do you have a work order number?
 - If so, what is the number?
 - If not, what is the name of the tenant that this work order is tied to?
- Is there a date associated with this work order?
 - If so, what is the date?

General Support ► Partner Access ► Employee Access

- Is employee having issues with logging into the Employee Portal?
 - If so, what is the employee's username and email address?
- Does the employee need a password reset?
 - If so, what is the employee's username and email address?
- Does the employee need to be re-registered?
 - If so, what is the employee's username and email address?

General Support ► Partner Access ► Landlord Access

- Is the landlord having portal login issues?
 - If so, what is the landlord's username?
- Does the landlord need a password reset?
 - If so, what is the landlord's username and email address?
- Does the landlord need to be re-registered? If so:
 - What is the landlord property?
 - What is the landlord's username?
- Do the landlords need to be grouped?
 - If so, which landlords will be grouped under the primary landlord?

General Support ► PIC

- Are you receiving a PIC error? If so:
 - Who is the tenant you are receiving the error on?
 - What record are you trying to send?
 - What is the error? (Attach a screenshot of the message.)
- Are you receiving an error message in TransNet (not a PIC error)? If so:
 - What does the error message say? (Attach a screenshot of the message.)
 - When you received the error, what were you doing? (Choose one.)

Gathering eTrans

Uploading to PIC

Running/Updating a report

- ▶ If the error message is “PIC may be experiencing problems,” have you logged directly onto the PIC website to see if your password needs to be reset?
- ▶ If your password is current, does the PIC user and password in TransNet setup screen belong to another user?
 - If so, if you know who it belongs to, have them login to PIC to see if they need to reset their password.
- Do you have an issue/question about something on the PIC website (REAC/WASS user)? If so:
 - ▶ Is it an issue with what you have access to on PIC?
 - If so, is there certain information you are trying to find?
 - ▶ Is there something that you do not know how to use, but need to?
 - ▶ What are you trying to accomplish?

General Support ▶ Tenmast University ▶ Add New User

- What is the new user's full name?
- What is the new user's email address?
- Would you like to model the new user's course load after an existing user?
 - ▶ If so, what is the existing user's full name?
 - ▶ If not, list any TU teams to which the new user should be assigned. (This determines which courses are assigned to the user. Note that all basic courses are assigned by default.)

General Support ▶ Tenmast University ▶ Deactivate User

- What is the user's full name?
- What is the user's email address?

General Support ▶ Tenmast University ▶ Modify Existing User

- What is the user's full name?
- What is the user's email address?
- Describe the desired modification, which is usually a change to the user's profile or course load.

General Support ▶ Tenmast University ▶ Reset Password

- What is the user's full name?
- What is the user's email address?

Hardware/Network – Website Change

- Describe in detail the changes you need made to your website.
- Do you have any files to attach? If so:
 - ▶ Describe how these files should be used or where they should be linked from.
 - ▶ Attach the files.

New Client Conversion ▶ Configuration ▶ Accounting ▶ 1099

- What do you need assistance with? (Choose one.)
 - Policy settings*
 - Transmitter settings*
 - Payer/company TIN*
 - Bank account association*
 - Other*
- Provide details and attach screenshots if applicable. (Example: What needs to change? Does something need to be added? What is the *current* value or state and what *should* it be?)

New Client Conversion ▶ Configuration ▶ Accounting ▶ Accounts Payable

- What do you need assistance with? (Choose one.)
 - Policy settings*
 - Vendor types*

Bank accounts
Check formats
ACS format
Positive pay
Other

- Provide details and attach screenshots if applicable. (Example: What needs to change? Does something need to be added? What is the *current* value or state and what *should* it be?)

New Client Conversion ► Configuration ► Accounting ► Check Reconciliation

- What do you need assistance with? (Choose one.)

Policy settings
Bank accounts
File import
Other

- Provide details and attach screenshots if applicable. (Example: What needs to change? Does something need to be added? What is the *current* value or state and what *should* it be?)

New Client Conversion ► Configuration ► Accounting ► Consumable Inventory

- What do you need assistance with? (Choose one.)

Warehouses account mapping
Developments account mapping
Other places to charge the expense
Other

- Provide details and attach screenshots if applicable. (Example: What needs to change? Does something need to be added? What is the *current* value or state and what *should* it be?)

New Client Conversion ► Configuration ► Accounting ► Fixed Assets

- What do you need assistance with? (Choose one.)

Policy settings
Assets
Locations/sites
Asset classes
Account classes
Depreciation schedule
Other

- Provide details and attach screenshots if applicable. (Example: What needs to change? Does something need to be added? What is the *current* value or state and what *should* it be?)

New Client Conversion ► Configuration ► Accounting ► General Ledger

- What do you need assistance with? (Choose one.)

Policy settings
Bank accounts
Interfunds
FY end
Account types/FDS accounts
Account segments
Allocations
Financial reports
Other

- Provide details and attach screenshots if applicable. (Example: What needs to change? Does something need to be added? What is the *current* value or state and what *should* it be?)

New Client Conversion ► Configuration ► Accounting ► Payroll

- What do you need assistance with? (Choose one.)
 - Policy settings*
 - Employee setup*
 - Department profiles*
 - Leave configuration*
 - Compensation distribution*
 - Deductions/deduction calculations*
 - Direct deposit*
 - Check format*
 - Income types*
 - Exceptional deductions*
 - Tax rates*
 - Ledger account mapping/posting*
 - Other*
- Provide details and attach screenshots if applicable. (Example: What needs to change? Does something need to be added? What is the *current* value or state and what *should* it be?)

New Client Conversion ► Configuration ► Accounting ► Purchase Orders

- What do you need assistance with? (Choose one.)
 - Policy settings*
 - Ship-to settings (warehouses, offices, etc.)*
 - Charge to's – other places to charge the expense*
 - Item categories (same as in Accounting – Consumable Inventory)*
 - Dollar approval list for POs*
 - Buyers*
 - Departments*
 - Other*
- What version of software are you using?
- Provide details and attach screenshots if applicable. (Example: What needs to change? Does something need to be added? What is the *current* value or state and what *should* it be?)

New Client Conversion ► Configuration ► Accounting ► TAR

- What is the subsidy type? (Choose one.)
 - Public Housing*
 - Housing Choice Voucher/Section 8*
 - Multi-Family (TRACS)*
 - Tax Credit*
 - Other*
- What do you need assistance with? (Choose one.)
 - TAR policies*
 - Account/transaction mapping*
 - Cash drawer setup*
 - Bank accounts*
 - Direct debit profile*
 - EPF file settings*
 - Payment apply order*
 - Remittances*
 - Other*
- Provide details and attach screenshots if applicable. (Example: What needs to change? Does something need to be added? What is the *current* value or state and what *should* it be?)

New Client Conversion ► Configuration ► Discovery Preparation

- What is the minimum age required to submit an application?
- What is your agency passbook rate?
- What is your agency's security deposit policy?
- Do you allow a payment plan?
 - If so, how many payments are allowed?
- Does this policy apply to all developments?
 - If not, provide additional policy details and indicate which development(s) the policy applies to.
- What is your agency's late fee policy?
- Does this late fee policy apply to all developments?
 - If not, provide additional late fee policy details and indicate which development(s) the policy applies to.
- When calculating rent, which do you use? (Choose one.)
 - 30 days per month*
 - The actual number of days in the month*
- Attach the following documents: Income Limits, Standard Tenant Work Order Charges, and Residential Staff Contact Listing.
- Attach the following documents if applicable: ACOP, Admin Plan, Utility Allowance Sheets (HUD 52667), and Payment Standards for the last 2 years.

New Client Conversion ► Configuration ► Housing ► Certifications

- What is the subsidy type? (Choose one.)
 - Public Housing*
 - Housing Choice Voucher/Section 8*
 - Multi-Family (TRACS)*
 - Tax Credit*
 - Other*
- What do you need assistance with? (Choose one.)
 - Certification finalization results*
 - Certification steps*
 - Income limits*
 - Multifamily contract setup*
 - Payment standards*
 - Project/project policy*
 - Utility profiles*
 - Voucher numbering*
 - Other*
- What version of software are you using?
- Provide details and attach screenshots if applicable. (Example: What needs to change? Does something need to be added? What is the *current* value or state and what *should* it be?)

New Client Conversion ► Configuration ► Housing ► Scribe

- What is the subsidy type? (Choose one.)
 - Public Housing*
 - Housing Choice Voucher/Section 8*
 - Multi-Family (TRACS)*
 - Tax Credit*
 - Other*
- What do you need assistance with? (Choose one.)
 - Adding a new document*
 - Editing an existing document*
 - Adding a new report*
 - Editing an existing report*
 - Other*

- What is the name of the document or letter causing the issue?
- From what screen are you printing the document or report?
- Have you applied specific filters to the letter or document?

New Client Conversion ► Configuration ► Housing ► TAR

- What is the subsidy type? (Choose one.)
 - Public Housing*
 - Housing Choice Voucher/Section 8*
 - Multi-Family (TRACS)*
 - Tax Credit*
 - Other*
- What do you need assistance with? (Choose one.)
 - Account mapping*
 - Office and cash drawer setup*
 - Standard profiles*
 - Transaction and account types*
 - Payment apply order*
 - Other*
- What version of software are you using?
- Provide details and attach screenshots if applicable. (Example: What needs to change? Does something need to be added? What is the *current* value or state and what *should* it be?)

New Client Conversion ► Configuration ► Housing ► Units

- What is the subsidy type? (Choose one.)
 - Public Housing*
 - Housing Choice Voucher/Section 8*
 - Multi-Family (TRACS)*
 - Tax Credit*
 - Other*
- What do you need assistance with? (Choose one.)
 - Rent records*
 - Utility records*
 - Tax credit information*
 - Addresses*
 - Landlord/owner*
 - Utilities*
- What version of software are you using?
- Provide details and attach screenshots if applicable. (Example: What needs to change? Does something need to be added? What is the *current* value or state and what *should* it be?)

New Client Conversion ► Configuration ► Housing ► Waiting Lists & Applications

- What is the subsidy type? (Choose one.)
 - Public Housing*
 - Housing Choice Voucher/Section 8*
 - Multi-Family (TRACS)*
 - Tax Credit*
 - Other*
- What do you need assistance with? (Choose one.)
 - Waiting list management*
 - Certification finalization setup*
 - Status groups*
 - Unit offer status setup*
 - Voucher status setup*

Preferences

Custom fields

Incorrect ranking

- What version of software are you using?
- Provide details and attach screenshots if applicable. (Example: What needs to change? Does something need to be added? What is the *current* value or state and what *should* it be?)

New Client Conversion ► Configuration ► Maintenance ► Consumable Inventory

- What do you need assistance with? (Choose one.)

Warehouses

Item categories and measures

Consumable inventory employees

Consumable inventory policies

Other

- Provide details and attach screenshots if applicable. (Example: What needs to change? Does something need to be added? What is the *current* value or state and what *should* it be?)

New Client Conversion ► Configuration ► Maintenance ► Inspections

- What is the subsidy type? (Choose one.)

Public Housing

Housing Choice Voucher/Section 8

Multi-Family (TRACS)

Tax Credit

Other

- What do you need assistance with? (Choose one.)

Inspections

Protocols

Mobile configuration

Other

- What version of software are you using?
- Provide details and attach screenshots if applicable. (Example: What needs to change? Does something need to be added? What is the *current* value or state and what *should* it be?)

New Client Conversion ► Configuration ► Maintenance ► Work Orders

- What is the subsidy type? (Choose one.)

Public Housing

Housing Choice Voucher/Section 8

Multi-Family (TRACS)

Tax Credit

Other

- What do you need assistance with? (Choose one.)

Standard charges

Job codes

Employee information

Priorities

Mobile result codes

Other

- What version of software are you using?
- Provide details and attach screenshots if applicable. (Example: What needs to change? Does something need to be added? What is the *current* value or state and what *should* it be?)

New Client Conversion ► Configuration ► User Access & Security

- What do you need assistance with? (Choose one.)

Adding a new user

Modifying a user's access

Roles/groups

Authorization – calendar/development

Other

- What is the name and title of the user?
- If the user is listed in the legacy software system, what is the name and title in the legacy system?
- If the user should have the same access as someone else, what is that person's name and title?

New Client Conversion ► Conversion – Incorrect/Missing Data

- What type of data do you need assistance with? (Choose one.)

Housing

Accounting

Maintenance

Other

- Provide details and attach screenshots if applicable. (Example: What needs to change? Does something need to be added? What is the *current* value or state and what *should* it be?)

New Client Conversion ► Project Management

- What is the subsidy type? (Choose one.)

Public Housing

Housing Choice Voucher/Section 8

Multi-Family (TRACS)

Tax Credit

Other

- What do you need assistance with? (Choose one.)

Quotes

Change request

Other

- What version of software are you using?
- Provide details and attach screenshots if applicable. (Example: What needs to change? Does something need to be added? What is the *current* value or state and what *should* it be?)

New Client Conversion ► Training ► Accounting ► 1099

- What do you have a question and/or need training on? (Choose one.)

Gather 1099s

Edit 1099s

Adjust 1099 vendor name

Change file location

Generate submission file/fire

Generate reports

1099 adjustments

Reprint 1099

Other

- Provide details and attach screenshots if applicable. (Example: What needs to change? Does something need to be added? What is the *current* value or state and what *should* it be?)

New Client Conversion ► Training ► Accounting ► Accounts Payable

- What do you have a question and/or need training on? (Choose one.)

Add or edit a vendor

Activate/inactivate vendors

Process 1099s

Process checks

Edit check format
Accrue invoices
Add or edit invoices
Import invoice from purchase order
Import invoice from recurring template
View check history for a vendor
Change terms for a vendor
Edit remittance for a vendor
Void a check
Other

- Provide details and attach screenshots if applicable. (Example: What needs to change? Does something need to be added? What is the *current* value or state and what *should* it be?)

New Client Conversion ► Training ► Accounting ► Check Reconciliation

- What do you have a question and/or need training on? (Choose one.)
Reconcile an account
Add manual transactions
Import bank files to auto clear transactions
Void transactions
Other
- Provide details and attach screenshots if applicable. (Example: What needs to change? Does something need to be added? What is the *current* value or state and what *should* it be?)

New Client Conversion ► Training ► Accounting ► Consumable Inventory

- What do you have a question and/or need training on? (Choose one.)
Change/review account mapping
Post inventory to GL
Add charge to's
Other
- What version of software are you using?
- Provide details and attach screenshots if applicable. (Example: What needs to change? Does something need to be added? What is the *current* value or state and what *should* it be?)

New Client Conversion ► Training ► Accounting ► Fixed Assets

- What do you have a question and/or need training on? (Choose one.)
Add an asset
Transfer an asset
Dispose of an asset
Depreciate assets
Generate reports for assets
Other
- Provide details and attach screenshots if applicable. (Example: What needs to change? Does something need to be added? What is the *current* value or state and what *should* it be?)

New Client Conversion ► Training ► Accounting ► General Ledger

- What do you have a question and/or need training on? (Choose one.)
Add a ledger account
Add a bank account
Make a journal entry
Copy a batch
Import/export a batch
Reverse a batch
Add a new fund

Setup/change interfunds
Setup/change allocations
Open FY for posting/budgeting
Close/open a fiscal period
Generate closing entries
Other

- Provide details and attach screenshots if applicable. (Example: What needs to change? Does something need to be added? What is the *current* value or state and what *should* it be?)

New Client Conversion ► Training ► Accounting ► Payroll

- What do you have a question and/or need training on? (Choose one.)

Add a new employee
Terminate an employee
Set up income types
Process payroll checks
Generate W-2s
Add/change department profiles
Add/change compensation distributions
Enter time sheets
Import time sheet
Accrue/adjust leave
Change deduction amounts
Other

- Provide details and attach screenshots if applicable. (Example: What needs to change? Does something need to be added? What is the *current* value or state and what *should* it be?)

New Client Conversion ► Training ► Accounting ► Purchase Orders

- What do you have a question and/or need training on? (Choose one.)

Create a request
Create a quote request
Create a requisition
Create a purchase order
Receive a PO
Partially receive a PO
Approve a PO
Use or create a blanket PO
Generate reports
Other

- Provide details and attach screenshots if applicable. (Example: What needs to change? Does something need to be added? What is the *current* value or state and what *should* it be?)

New Client Conversion ► Training ► Accounting ► TAR

- What do you have a question and/or need training on? (Choose one.)

Change/review account mapping
Run reports
Manage cash drawers
Process payments
Void a payment
Charge late fees
Process direct debit
Close the month for accounting
Other

- What version of software are you using?

- Provide details and attach screenshots if applicable. (Example: What needs to change? Does something need to be added? What is the *current* value or state and what *should* it be?)

New Client Conversion ► Training ► Housing ► Applications

- What is the subsidy type? (Choose one.)
 - Public Housing*
 - Housing Choice Voucher/Section 8*
 - Multi-Family (TRACS)*
 - Tax Credit*
 - Other*
- What do you have a question and/or need training on? (Choose one.)
 - Manually removing applicant waiting list*
 - Veteran status*
 - Scribe waiting list report*
 - Waiting list merge*
 - Other*
- What version of software are you using?
- Provide details and attach screenshots if applicable. (Example: What needs to change? Does something need to be added? What is the *current* value or state and what *should* it be?)

New Client Conversion ► Training ► Housing ► Certifications

- What is the subsidy type? (Choose one.)
 - Public Housing*
 - Housing Choice Voucher/Section 8*
 - Multi-Family (TRACS)*
 - Tax Credit*
 - Other*
- What do you have a question and/or need training on? (Choose one.)
 - Pre-admission*
 - New admission*
 - Unit transfer/change of unit*
 - Interim certification*
 - Annual reexamination*
 - End of participation*
 - Other*
- What version of software are you using?
- Provide details and attach screenshots if applicable. (Example: Are you getting this error are multiple tenants or just one? Is it a work stoppage or are you able to finalize the certification? Is the calculation incorrect?)

New Client Conversion ► Training ► Housing ► Dual Subsidy

- What is the subsidy type? (Choose one.)
 - Public Housing*
 - Housing Choice Voucher/Section 8*
 - Multi-Family (TRACS)*
 - Tax Credit*
 - Rural Development*
 - Other*
- What do you have a question and/or need training on? (Choose one.)
 - Certifications*
 - Rental assistance*
 - Payments*
 - Accounts*
 - Other*

- What version of software are you using?
- Provide details and attach screenshots if applicable. (Example: What needs to change? Does something need to be added? What is the *current* value or state and what *should* it be?)

New Client Conversion ► Training ► Housing ► Initialization/Check Run

- What is the subsidy type? (Choose one.)
 - Public Housing*
 - Housing Choice Voucher/Section 8*
 - Multi-Family (TRACS)*
 - Tax Credit*
 - Other*
- What do you have a question and/or need training on? (Choose one.)
 - Initialization*
 - Check run*
- What version of software are you using?

New Client Conversion ► Training ► Housing ► Monthly Processes

- What is the subsidy type? (Choose one.)
 - Public Housing*
 - Housing Choice Voucher/Section 8*
 - Multi-Family (TRACS)*
 - Tax Credit*
 - Other*
- What do you have a question and/or need training on? (Choose one.)
 - Generating rent*
 - Generating statements*
 - URP processing*
 - Late fees and notices*
- What version of software are you using?

New Client Conversion ► Training ► Housing ► Portability

- What do you have a question and/or need training on? (Choose one.)
 - Incoming portable tenants*
 - Outgoing portable tenants*
 - Port payments from other PHA*
 - Billing other PHAs*
 - Other*
- What version of software are you using?
- Provide details and attach screenshots if applicable. (Example: What needs to change? Does something need to be added? What is the *current* value or state and what *should* it be?)

New Client Conversion ► Training ► Housing ► Tenant Submissions

- What do you have a question and/or need training on? (Choose one.)
 - Submitting eTrans records to PIC*
 - Submitting records to MINC*
 - IMAX submissions*
 - Tax credit submissions*
 - Other*
- What version of software are you using?
- Provide details and attach screenshots if applicable. (Example: What needs to change? Does something need to be added? What is the *current* value or state and what *should* it be?)

New Client Conversion ► Training ► Housing ► Units

- What is the subsidy type? (Choose one.)
 - Public Housing*
 - Housing Choice Voucher/Section 8*
 - Multi-Family (TRACS)*
 - Tax Credit*
 - Other*
- What do you have a question and/or need training on? (Choose one.)
 - Unit setup*
 - Adding units*
 - Rent reasonableness*
- What version of software are you using?

New Client Conversion ► Training ► Housing ► Waiting List

- What do you have a question and/or need training on? (Choose one.)
 - Manually remove applicant waiting list*
 - Add an applicant to an additional waiting list*
 - Other*
- What version of software are you using?

New Client Conversion ► Training ► Maintenance ► Consumable Inventory

- What do you have a question and/or need training on? (Choose one.)
 - Add a new item*
 - Process inventory transactions*
 - Perform a physical inventory*
 - Create a restock/picklist*
 - Create a purchase request*
 - Other*
- Provide details and attach screenshots if applicable. (Example: What needs to change? Does something need to be added? What is the *current* value or state and what *should* it be?)

New Client Conversion ► Training ► Maintenance ► Inspections

- What do you have a question and/or need training on? (Choose one.)
 - Scheduling inspections*
 - Inspection results*
 - Letters*
 - Reports*
 - Other*
- Provide details and attach screenshots if applicable. (Example: What needs to change? Does something need to be added? What is the *current* value or state and what *should* it be?)

New Client Conversion ► Training ► Maintenance ► Mobiles

- What do you have a question and/or need training on? (Choose one.)
 - Install Tenmast apps for Android devices*
 - Use the Android app to complete an inspection*
 - Synchronize data*
 - Other*
- Provide details and attach screenshots if applicable. (Example: What needs to change? Does something need to be added? What is the *current* value or state and what *should* it be?)

New Client Conversion ► Training ► Maintenance ► Work Orders

- What do you have a question and/or need training on? (Choose one.)
 - Adding a new work order*

Assigning a work order

Work codes and job codes

Other

- Provide details and attach screenshots if applicable. (Example: What needs to change? Does something need to be added? What is the *current* value or state and what *should* it be?)

New Client Conversion ► Training ► Other ► Reports & Scribe

- What do you have a question and/or need training on? (Choose one.)

Run a report for specific information

Create a new report

Print a specific document

Create a new document

Add and track ticklers to a document

Other

- What is the name of the document or letter causing the issue?
- From what screen are you printing the document or report?
- Have you applied specific filters to the letter or document?
- Provide details and attach screenshots if applicable. (Example: What needs to change? Does something need to be added? What is the *current* value or state and what *should* it be?)

New Client Conversion ► Training ► Other ► TenDocs

- What do you have a question and/or need training on? (Choose one.)

Setup TenDocs

Scan documents

Understand categories

Retrieve documents

Other

- Provide details and attach screenshots if applicable. (Example: What needs to change? Does something need to be added? What is the *current* value or state and what *should* it be?)

Partner Support

- Describe the issue and include any affected clients.

Quote For Service

- Describe the service to be quoted on.