Unified Platform

Residents Reports

User Guide

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Contents

BOOK I

Residents Reports

This chapter provides information about all available **Residents** reports.

In This Book

CHAPTER 1

Management Reports

Management reports are available in the **Residents** reports area. You can generate and view the following reports:

- **Activity:** (on page 9) This report lists entries from activity journals of prospects, applicants, or residents during the report period.
- **All Residents:** (on page 13) This report lists contact, lease, and scheduled billing information for applicants and residents.
- **All Residents (Excel):** (on page 18) This report lists contact, lease, and scheduled billing information for applicants and residents.
- **Box Score:** (on page 22) This report shows the property's leasing performance in a box score format for easy analysis.
- **Contact Level Details:** (on page 34) This report displays a contact's personal information entered when the person was added to the account or the information was edited.
- **Current Renewal Status:** (on page 44) This report provides a listing of leases that have expired or that are due to expire within the number of days specified at report submission.
- **Household Member Listing by Age:** (on page 50) This report lists the ages of household members and summarizes the counts by age, gender, and household status.
- **Lease Details:** (on page 54) This report provides unit, lease, and final account information for applicants and residents, based on the fields selected when the report is generated.
- **Lease Expiration Bar Graph:** (on page 63) This report shows your property's lease expiration control percentages and how these percentages compare with actual lease expirations during a given month and year.
- **Lease Expiration Detail:** (on page 74) This report shows month-to-month leases and the leases due to expire during the selected period.
- **Lease Expiration Renewal Detail (Excel):** (on page 77) This report shows information for residents whose leases are due to expire during the selected period.
- **Lease Expiration Summary by Floor Plan:** (on page 82) This report includes all leases that will expire during the next 12 months.
- **Lease Renewal Trend:** (on page 84) This report shows renewal statistics for the selected period.
- **Lease Variance by Move In Date:** (on page 87) This report provides a snapshot of your property's leases for all current residents as of the current property date.
- **Mailing Labels:** (on page 90) This report generates mailing labels for your residents.
- **Mailing Labels Export:** (on page 93) This report generates a list of mailing labels for prospects, applicants, and/or residents. You can generate the report in a standard XML file

format or CSV file format, and then export the data to Microsoft® Word® where you can use the mail merge feature to generate the address labels in any size you need.

- **Minnesota Certificate of Rent Paid (CRP):** (on page 104) Generate and upload this Excel file into the Minnesota e-Services website for reporting certificate of rent paid information for residents.
- **Monthly Activity Summary:** (on page 109) This report summarizes occupancy and accounting activity by floor plan.
- **Parking/Vehicle Information:** (on page 114) This report lists all of the vehicles that have been set up in OneSite for residents and applicants at your property.
- **Pending Tasks:** (on page 117) This report allows you to preview future scheduled tasks to determine if any require editing.
- **Projected Occupancy:** (on page 122) This report calculates the number of scheduled move-ins and move-outs on a weekly basis to help you project occupancy at your site from 4 to 52 weeks in the future.
- **Reasons for Move Outs:** (on page 125) This report lists the reasons residents are moving out of your property for a given period.
- **Rent Roll Detail:** (on page 128) This report provides a snapshot of units as of a specified date. It shows a unit's floor plan, square footage, occupancy status, and market rent.
- **Rent Roll Detail (Excel):** (on page 134) This report is a comprehensive snapshot of units at your property as of a specified date.
- **Rent Roll Detail Modified (Excel):** (on page 140) This report is a comprehensive snapshot of scheduled billing as of a specified date.
- **Resident Activity:** (on page 144) This report shows selected leasing activities for a specified date range.
- **Resident Birthdays:** (on page 151) This report generates a list of residents whose birthdays fall during the same month.
- **Resident Demographics:** (on page 153) This report lists demographic information for current residents, applicants, and pending residents (prospects).
- **Resident Ledgers:** (on page 156) This report lets you print account ledgers in bulk.

In This Chapter

Activity Report

Unified Platform ≡ Navigation Menu > Reports > Manage Reports > Residents/Management (Report Area) > Activity

The *Activity* report lists entries from activity journals of prospects, applicants, or residents during the report period. By default, all activities are eligible, but you can limit them to a specific unit, leasing consultant, and/or occupant name.

The report can have up to three sections:

- The *Activity* section lists entries from the person's activity journal added through the **Record Activity** pane, which you can access by clicking the + **New Activity** button on the **Activity** tab on the **Account Profile** page or the **Record Activity** button on the **Applicants**, **Conventional Waitlist**, **Residents**, or **Non-Residents** pages. This section can also include any system-generated entries from leasing activities, such as quotes, transfers, and canceled notices or applications.
- The *Letter/Notice Activity* section appears if you include letters and notices history in the report. It lists the types of letters generated during the report period, as reflected on the **Letters and Notices** tab on the **Documents** tab on the person's **Account Profile** page. For each letter generated during the report period, the report includes the name of the letter, the created date, and the letter status.
- The *Follow-Up Activity* section appears if you include follow-ups in the report. Appointments and contacts on the **Follow-up** tab on the **Account Profile** page scheduled during the report period are eligible. For each record, the report includes the follow-up priority, the date and time the appointment or contact is scheduled, the leasing consultant assigned to the follow-up, and any notes or comments.

The *Resident Activity* report prints move-ins, move-outs, and other leasing activities. For more information, refer to Resident Activity Report (on page 144).

Activity Options

Unified Platform ≡ Navigation Menu > Reports > Manage Reports > Residents/Management (Report Area) > Activity

The *Activity* report provides the following options used to select the information in the report and determine the report format.

Report Options

- **Generate Now:** To generate the report immediately, leave this option selected.
- **Schedule for Later:** To generate the report at a future date or time, select this option, and then perform the following:

  - Click the Calendar in the **Date** field, and then select the date you want to run the report.
  - Use the **Time** drop-down list to select the time when you want to generate the report. You can select any time of day in 30-minute increments.
- **Format:** Choose the report format. Available file types include:
  - **Standard XML:** To generate the report as an XML file, select this option. See **Viewing Completed Reports or Extracts** for information on viewing an XML report.
- **HTML Report:** To generate and view the report in HTML, select this option. See Viewing Completed Reports or Extracts for information on viewing an HTML report.
  - **Excel Export:** To generate the report as an XLS file, select this option. Reports generated in Excel format automatically download when completed.
  - **CSV Export:** To generate the report as a CSV file, select this option. Reports generated in CSV format automatically download when completed.
- **Select Property:** Use this drop-down list to select the properties. You can scroll through the list or type a few characters of the property name in the **Search** field to find and select properties. Click the **Clear** button in the **Search** field to type a new value. If you have access to only one property, the property is selected by default.
- **Send Email to External Recipient(s) upon Completion:** If you have the "External Report Distribution" right, you can type an email address in this field to send an email message to people outside of your organization. Use a semicolon to separate multiple email addresses. After the report is generated, an email message with a link to the report is sent.
- **Send Notification to Internal User(s) Upon Completion:** To send a notification to an internal user that the report is complete, use this drop-down list. You can select multiple users by selecting the check box beside each user you want to include.
- **Send File to Cloud Service upon Completion:** If you have the "External Report Distribution" right, you can use this drop-down list to select the cloud service account to which you want to send the report. After the report is generated, it is exported to the cloud service account's storage.

Parameters

- **Start Date:** Use the **Calendar** to select the start date of the date range.
- **End Date:** Use the **Calendar** to select the end date of the date range. Activities recorded during this period are eligible for inclusion in the report.
- **Account Status:** Use the drop-down list to select an occupancy status:
  - **Resident:** Select this status to report activities for current residents.
  - **Applicant:** Select this status to report activities for current and former applicants (unit selected) and waitlisted applicants (no unit selected).
  - **Former:** Select this status to report activities for former residents.
  - **Prospect:** Select this status to report activities for prospects.

- **Activity Type:** Select the check boxes beside the activity types you want to include in the report. The **All** check box is selected by default.

  To report specific activities, clear the **All** check box, and then select the specific activity type(s) you want.

  - **Subproperty:** Use the drop-down list to select a specific subproperty. Select **All subproperties** to include all subproperties in the list. This option does not appear if you select **Prospect** or **Former** from the **Account Status** drop-down list.
  - **Include Letters and Notices:** Activate this switch to add the *Letter/Notice Activity* section to the report. This option does not appear if you select **Prospect** from the **Account Status** drop-down list.
- **Include Follow Up:** Activate this switch to report follow-up activities. This adds the *Follow-Up Activity* section to the report which shows scheduled appointments and contacts on the person's **Follow-up** tab.
- **Include System Generated Activities:** Activate this switch to include system-generated activities in the report.
- **Leasing Consultant:** Use the drop-down list to select the leasing consultant and limit the report to activities assigned to a specific leasing consultant,. Select **All** to report activities for all leasing consultants.

Activity Columns

Unified Platform: ≡ Navigation Menu > Reports > Manage Reports > Last Run Date > View Report

Activity

This section prints records from the person's activity journal added through the **Record Activity** pane, which you can access by clicking the + **New Activity** button on the **Activity** tab on the **Account Profile** page or the **Record Activity** button on the **Applicants**, **Conventional Waitlist**, **Residents**, or **Non-Residents** pages. Additionally, the system adds records to a person's activity journal as you complete leasing activities.

- **Bldg/Unit:** This is the building number (if buildings are used at the property) and the unit number. This is blank if you are generating the report for prospects.
- **Name:** This is the head of household name (Last, First).
- **Address, City, State, ZIP:** This is the unit or alternate address specified on the person's **General information** page.
- **Type:** This is the activity type, such as edited lease or moved out.
- **Date:** This is the activity date.
- **Leasing Consultant:** This is the leasing consultant that entered or was assigned to the activity.

- **Notes:** This is the latest note or comment associated with this activity.

Letter/Notice Activity

This section appears if you generated the report for applicants or residents and included letters and notices in the report. It lists the types of letters generated during the report period, as reflected on the **Letters and Notices** tab on the **Documents** tab on the person's **Account Profile** page.

- **Bldg/Unit:** This is the building number (if buildings are used at the property) and the unit number.
- **Recipient:** This is the recipient of the letter or notice (Last, First).
- **Letter/Notice:** This is the letter or notice type, such as Statement of account or Notice to pay with detail.
- **Status:** This is the letter status, such as Not printed or Printed.
- **Created:** This is the system date on which the letter or notice was generated.
- **Created By:** This is the leasing consultant who generated the letter or notice.
- **Notes:** This is the latest note or comment entered for the letter or notice.

Follow-Up Activity

This section appears if you included follow-up activities in the report. It lists the activities scheduled for the prospect, applicant, or resident during the report period, as reflected on the **Follow-up** tab of the person's **Account Profile** page.

- **Bldg/Unit:** This is the building number (if buildings are used at the property) and the unit number. This is blank for prospects.
- **Name:** This is the head of household name (Last, First).
- **Follow-Up Type:** This is the follow-up type, which is appointment or contact. If the follow-up is a contact, the system lists the type of contact that is scheduled, such as Phone call or Visit.
- **Priority:** This is the priority selected for the follow-up activity (Low, Medium, or High).
- **Date/Time:** This is the date and time the appointment or contact is scheduled.
- **Assigned to:** This is the leasing consultant assigned to the follow-up activity.
- **Notes:** This lists any notes entered for the follow-up activity.

All Residents Report

Unified Platform ≡ Navigation Menu > Reports > Manage Reports > Residents/Management (Report Area) > All Residents

The *All Residents* report is located in the **Residents/Management** report area (on page 13).

The *All Residents* report lists contact, lease, and scheduled billing information for applicants and residents. Information is reported as of the current property date.

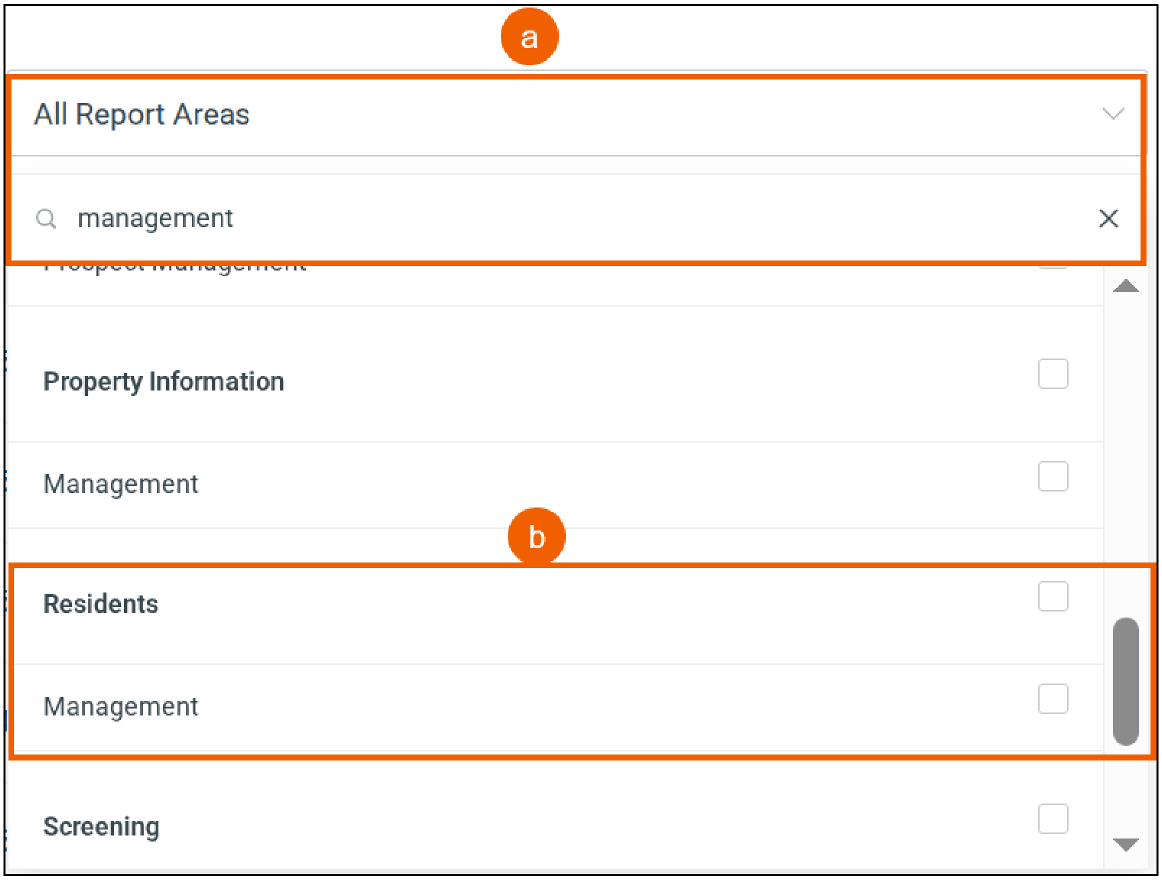
For each contact, the report includes the person's name and unit number, lease status, age, and telephone number. Lease information includes lease dates, current scheduled billing charges and credits, deposits held amount, number of NSF checks, and late payments. The total number of applicants and residents reported is provided on the last page of the report.

Current Leases and Former Household Members

If you move out a household member on a current lease (you edit the contact and enter a move-out date), the person is considered inactive and has a contact status of F (former). The **Include Inactive Household Members** report parameter lets you include former contacts on a current lease. If selected, former contacts are excluded from the report, if the move-out date is on or prior to the property date. Otherwise, the former contact is included in the report until the property date is advanced to the move-out date, regardless of this parameter.

Filtering Reports by Report Area

Use the **All Report Areas** drop-down list to filter reports by category on the **Reports** page. In the following example, the user filtered the reports by the **Management** category, and then scrolled through the list to select the **Residents/Management** report area:



a) **All Report Areas:** Use the drop-down list to type **management** in the **Search** field. The system filters the report areas to the categories that provide management reports.

b) **Specific Report Area:** Scroll to the report area you need and select the **Management** category to access the reports in that area.

All Residents Options

Unified Platform ≡ Navigation Menu > Reports > Manage Reports > Residents/Management (Report Area) > All Residents

The *All Residents* report provides the following options used to select the information in the report and determine the report format.

Report Options

- **Generate Now:** To generate the report immediately, leave this option selected.
- **Schedule for Later:** To generate the report at a future date or time, select this option, and then perform the following:

- Click the Calendar in the **Date** field, and then select the date you want to run the report.
- Use the **Time** drop-down list to select the time when you want to generate the report. You can select any time of day in 30-minute increments.

- **Format:** Choose the report format. Available file types include:
  - **PDF:** To generate the report as a PDF file, select this option. Reports generated as PDF files appear on a new browser tab when completed.
  - **Word:** To generate the report as a DOC file, select this option. Reports generated in Word format automatically download when completed.
  - **Excel:** To generate the report as an XLS file, select this option. Reports generated as Excel files are downloaded to your device automatically when completed.
- **Select Property:** Use this drop-down list to select the properties. You can scroll through the list or type a few characters of the property name in the **Search** field to find and select properties. Click the **Clear** button in the **Search** field to type a new value. If you have access to only one property, the property is selected by default.
- **Send Email to External Recipient(s) upon Completion:** If you have the "External Report Distribution" right, you can type an email address in this field to send an email message to people outside of your organization. Use a semicolon to separate multiple email addresses. After the report is generated, an email message with a link to the report is sent.
- **Send Notification to Internal User(s) Upon Completion:** To send a notification to an internal user that the report is complete, use this drop-down list. You can select multiple users by selecting the check box beside each user you want to include.
- **Send File to Cloud Service upon Completion:** If you have the "External Report Distribution" right, you can use this drop-down list to select the cloud service account to which you want to send the report. After the report is generated, it is exported to the cloud service account's storage.

Parameters

- **Account Status:** Select the check boxes beside each resident occupancy status to include the status in the report. Select the **Select All** check box to select all statuses.
  - **Applicant:** The report includes applicants only.
  - **Approved applicant:** The report includes approved applicants only. This occupancy status applies to properties recently migrated from the 2.3 version of OneSite Leasing & Rents, and the system hasn't updated approved statuses to "Applicant" yet.
  - **Former applicant:** The report includes canceled or rejected applicants only.
  - **Pending resident:** The report includes pending residents only. This occupancy status applies to properties recently migrated from the 2.3 version of OneSite Leasing & Rents, and the system hasn't updated pending statuses to "Current resident" yet.
  - **Current resident:** The report includes current residents only.

    - **Former resident:** The report includes former residents only.
- **Household Status:** Use the drop-down list to filter the report to include contacts flagged as lease signers only, occupants only, or both.
- **Include Inactive Household Members:** Activate this switch if you want to include all members with an *Inactive* status from the report. If a person's inactive date is after the current property date, which is the report as of date, the member will appear in the report, regardless of this setting. Inactive date refers to the move-out date entered for a contact on a current lease.
- **Sort By:** Use the drop-down list to sort residents by unit number or resident name.

All Residents Columns

Unified Platform: ≡ Navigation Menu > Reports > Manage Reports > Last Run Date > View Report

For each person, the following information is printed in columns from left to right on the page.

- **Name:** This is the person's name with the last name listed first.
- **Status:** This is the person's current occupancy status.
- **Contact Status:** This identifies a person's contact status:
    - **Lease signer:** If the person is a lease signer, "S" appears.
    - **Cosigner:** If the person is a cosigner, "C" appears.
    - **Guarantor:** If the person is a guarantor, "G" appears.
    - **Former:** If the person is a former resident, "F" appears. If this is a current resident with a **Former** status, a move-out date has been entered for the resident. At a glance, you will be able to determine any resident who has moved out on a current lease.
    - Blank indicates the person is not a lease signer, cosigner, guarantor, or former resident. (The person is an occupant or employee, for example.)
- **Bldg/Unit:** This is the building number (if buildings are used at the property) and the unit number.
- **Age:** This is the person's age.
- **Phone:** This is the person's home telephone number.
- **Move-In:** This is the person's move-in date.
- **Expires:** This is the person's lease end date.
- **Notice for Date:** If the person has given notice to move out or transfer, this is the scheduled move-out date.
- **Move-Out:** This is the move-out date for former residents.
- **Jrnl:** This is the subjournal to which rent and other monthly charges are assigned in current scheduled billing. If subjournals are not used, all transactions are posted to the Resident journal.

- **Rent:** This is the monthly rent charge (total of CA-charges from scheduled billing) for the listed subjournal.
- **Other:** This is the total of all other (non-rent) monthly charges from scheduled billing for the listed subjournal.
- **Deposit:** This is deposits held (the total amount of receipts in the deposits ledger).
- **NSF:** This is the total number of NSF checks to date.
- **Late:** This is the number of late payments recorded for the person.
- **Total Residents:** This line prints after the last resident and shows the total number of applicants and residents in the report.

All Residents (Excel) Report

Unified Platform ≡ Navigation Menu > Reports > Manage Reports > Residents/Management (Report Area) > All Residents (Excel)

The *All Residents (Excel)* report lists contact, lease, and scheduled billing information for applicants and residents. Information is reported as of the current property date.

For each contact, the report includes the person's name and unit number, lease status, age, and telephone number. Lease information includes lease dates, current scheduled billing charges and credits, deposits held amount, number of NSF checks, and late payments. The total number of applicants and residents reported is provided on the last page of the report.

Current Leases and Former Household Members

If you move out a household member on a current lease (you edit the contact and enter a move-out date), the person is considered inactive and has a contact status of F (former). The **Include Inactive Household Members** report parameter lets you include former contacts on a current lease. If selected, former contacts are excluded from the report, if the move-out date is on or prior to the property date. Otherwise, the former contact is included in the report until the property date is advanced to the move-out date, regardless of this parameter.

All Residents (Excel) Options

Unified Platform ≡ Navigation Menu > Reports > Manage Reports > Residents/Management (Report Area) > All Residents (Excel)

The *All Residents (Excel)* report provides the following options used to select the information in the report and determine the report format.

Report Options

- **Generate Now:** To generate the report immediately, leave this option selected.
- **Schedule for Later:** To generate the report at a future date or time, select this option, and then perform the following:
  - Click the **Calendar** in the **Date** field, and then select the date you want to run the report.
  - Use the **Time** drop-down list to select the time when you want to generate the report. You can select any time of day in 30-minute increments.
- **Format:** Choose the report format. Available file types include:
  - **Standard XML:** To generate the report as an XML file, select this option. See **Viewing Completed Reports or Extracts** for information on viewing an XML report.
  - **Excel:** To generate the report as an XLS file, select this option. Reports generated as Excel files are downloaded to your device automatically when completed.

- **Select Property:** Use this drop-down list to select the properties. You can scroll through the list or type a few characters of the property name in the **Search** field to find and select properties. Click the **Clear** button in the **Search** field to type a new value. If you have access to only one property, the property is selected by default.
- **Send Email to External Recipient(s) upon Completion:** If you have the “External Report Distribution” right, you can type an email address in this field to send an email message to people outside of your organization. Use a semicolon to separate multiple email addresses. After the report is generated, an email message with a link to the report is sent.
- **Send Notification to Internal User(s) Upon Completion:** To send a notification to an internal user that the report is complete, use this drop-down list. You can select multiple users by selecting the check box beside each user you want to include.
- **Send File to Cloud Service upon Completion:** If you have the “External Report Distribution” right, you can use this drop-down list to select the cloud service account to which you want to send the report. After the report is generated, it is exported to the cloud service account’s storage.

Parameters

- **Account Status:** Select the check boxes beside each resident occupancy status to include the status in the report. Select the **Select All** check box to select all statuses.
    - **Applicant:** The report includes applicants only.
    - **Approved applicant:** The report includes approved applicants only. This occupancy status applies to properties recently migrated from the 2.3 version of OneSite Leasing & Rents, and the system hasn’t updated approved statuses to “Applicant” yet.
    - **Former applicant:** The report includes canceled or rejected applicants only.
    - **Pending resident:** The report includes pending residents only. This occupancy status applies to properties recently migrated from the 2.3 version of OneSite Leasing & Rents, and the system hasn’t updated pending statuses to “Current resident” yet.
    - **Current resident:** The report includes current residents only.
    - **Former resident:** The report includes former residents only.
- **Household Status:** Use the drop-down list to filter the report to include contacts flagged as lease signers only, occupants only, or both.
- **Include Inactive Household Members:** Activate this switch if you want to include all members with an *Inactive* status from the report. If a person’s inactive date is after the current property date, which is the report as of date, the member will appear in the report, regardless of this setting. Inactive date refers to the move-out date entered for a contact on a current lease.
- **Sort By:** Use the drop-down list to sort residents by unit number or resident name.

All Residents (Excel) Columns

Unified Platform: ≡ Navigation Menu > 🗎 Reports > Manage Reports > Last Run Date > View Report

For each person, the following information is printed in columns from left to right on the page.

- **Name:** This is the person's name with the last name listed first.
- **Status:** This is the person's current occupancy status.
- **Contact Status:** This identifies a person's contact status:
  - **Lease signer:** If the person is a lease signer, "S" appears.
  - **Cosigner:** If the person is a cosigner, "C" appears.
  - **Guarantor:** If the person is a guarantor, "G" appears.
  - **Former:** If the person is a former resident, "F" appears. If this is a current resident with a **Former** status, a move-out date has been entered for the resident. At a glance, you will be able to determine any resident who has moved out on a current lease.
  - Blank indicates the person is not a lease signer, cosigner, guarantor, or former resident. (The person is an occupant or employee, for example.)
- **Bldg/Unit:** This is the building number (if buildings are used at the property) and the unit number.
- **Age:** This is the person's age.
- **Phone:** This is the person's home telephone number.
- **Move-In:** This is the person's move-in date.
- **Expires:** This is the person's lease end date.
- **Notice for Date:** If the person has given notice to move out or transfer, this is the scheduled move-out date.
- **Move-Out:** This is the move-out date for former residents.
- **Jrnl:** This is the subjournal to which rent and other monthly charges are assigned in current scheduled billing. If subjournals are not used, all transactions are posted to the Resident journal.
- **Rent:** This is the monthly rent charge (total of CA-charges from scheduled billing) for the listed subjournal.
- **Other:** This is the total of all other (non-rent) monthly charges from scheduled billing for the listed subjournal.
- **Deposit:** This is deposits held (the total amount of receipts in the deposits ledger).
- **NSF:** This is the total number of NSF checks to date.
- **Late:** This is the number of late payments recorded for the person.
- **Total Residents:** This line prints after the last resident and shows the total number of applicants and residents in the report.

Box Score Report

Unified Platform ≡ Navigation Menu > Reports > Manage Reports > Residents/Management (Report Area) > Box Score

The *Box Score Report* shows the property's leasing performance in a box score format for easy analysis. Different box scores show statistics for floor plans, availability, make readies, leasing activities, and vacancies.

Snapshots

The first part of the report provides several leasing snapshots that contain information valid as of the current property date. The *Floor Plan Group* snapshot gives statistics for vacant and occupied units, and calculates the occupancy percentage, average market rent, lease rent, and percentage of net leased units by floor plan and floor plan group. From this information, OneSite calculates scores for the *Availability/Exposure* and *Vacant Units Make Ready Status* snapshots that appear next.

Leasing Activity

The remaining portion of the report gives detailed leasing box scores for move-ins, move-outs, renewals, leases (canceled and denied), waitlisted applicants, and notices to vacate. Each section shows activities that occurred during the report period.

Box Score Options

Unified Platform ≡ Navigation Menu > Reports > Manage Reports > Residents/Management (Report Area) > Box Score

The *Box Score* report provides the following options used to select the information in the report and determine the report format.

Report Options

- **Generate Now:** To generate the report immediately, leave this option selected.
- **Schedule for Later:** To generate the report at a future date or time, select this option, and then perform the following:
    - Click the **Calendar** in the **Date** field, and then select the date you want to run the report.
    - Use the **Time** drop-down list to select the time when you want to generate the report. You can select any time of day in 30-minute increments.
- **Format:** Choose the report format. Available file types include:
    - **PDF:** To generate the report as a PDF file, select this option. Reports generated as PDF files appear on a new browser tab when completed.

    - **Excel:** To generate the report as an XLS file, select this option. Reports generated as Excel files are downloaded to your device automatically when completed.

- **Select Property:** Use this drop-down list to select the properties. You can scroll through the list or type a few characters of the property name in the **Search** field to find and select properties. Click the × **Clear** button in the **Search** field to type a new value. If you have access to only one property, the property is selected by default.
- **Send Email to External Recipient(s) upon Completion:** If you have the "External Report Distribution" right, you can type an email address in this field to send an email message to people outside of your organization. Use a semicolon to separate multiple email addresses. After the report is generated, an email message with a link to the report is sent.
- **Send Notification to Internal User(s) Upon Completion:** To send a notification to an internal user that the report is complete, use this drop-down list. You can select multiple users by selecting the check box beside each user you want to include.
- **Send File to Cloud Service upon Completion:** If you have the "External Report Distribution" right, you can use this drop-down list to select the cloud service account to which you want to send the report. After the report is generated, it is exported to the cloud service account's storage.

Parameters

- **Subproperty:** If you use subproperty accounting, use the drop-down list to select the subproperty to report only the units on that property. Or, leave the **All Subproperties** option selected to report all units on the entire property.

  This field defaults to **All Subproperties** *and is read-only if you choose multiple properties in the* **Select Property** *field.*

- **Include Activities During:** Use the drop-down list to select a date range or scheduling period:
    - **Date Range:** Click the **Calendar** in the **Start Date** field and select the start date of the report's date range. Then, click the **Calendar** in the **End Date** field and select the end date of the report's date range. The report includes the statistics and leasing activities occurring during this period.
    - **Scheduling Period:** Use the drop-down list to select a scheduling period. The report includes statistics and leasing activities that occurred during one of the following periods:
        - **Property Date minus 6 days (default selection)**
        - **Property Date**
        - **Calendar Month:** Select this option only when the property date is the last day of the calendar month; otherwise, the report produces an invalid end date error. For example, if the property date is 3/31, this option creates a March report. If the

property date is 3/28, the invalid end date error appears in the report. Choose the **Date range** option instead and select 3/1–3/28 as the report date range.

- **Fiscal Month:** Select this option only when the property date is the last day of the fiscal period; otherwise, the report produces an invalid end date error. For example, if the current fiscal period is 3/26–4/25 and the property date is 4/25, this option creates a current fiscal period report. If the property date is 4/15, the invalid end date error appears in the report. Choose the **Date range** option instead and select 3/26–4/15 as the report date range.
- **Previous Property Date**

- **Include Unit Designation:** Activate this switch to include the *Unit Designation* section in the report.

Box Score Columns

Unified Platform: ≡ Navigation Menu > Reports > Manage Reports > Last Run Date > View Report

The current system date appears in the upper-left corner, the report as of date and parameters appear below the title. Dates print in the mm/dd/yyyy or dd/mm/yyyy format depending on the country selected for the property in the regional options settings. The *Unit Status*, *Availability/Exposure*, *Vacant Units Make Ready Status*, and *Vacancies* sections are snapshots as of the current property date. All other sections are box scores that reflect activity for the date range.

For each section, information appears in columns from left to right on the page.

Unit Status – (Current Property Date)

This snapshot shows unit statuses as of the current property date.

- **Floor Plan Group:** This is the floor plan group name.
- **Floor Plan:** This lists each floor plan in the group by floor plan name.
- **Units:** This is the number of units in this floor plan.
- **Vacant – Total Vacant:** This is the total number of vacant units in this floor plan, which is the total of the next four columns (in this row).
- **Vacant – Not Leased:** This is the total number of vacant units that are not pre-leased in this floor plan.
- **Vacant – Leased:** This is the total number of vacant and pre-leased units in this floor plan.
- **Vacant – Model/Admin:** This is the total number of vacant units designated as unavailable for any reason other than "down" in this floor plan. The total includes units designated as employee, corporate, storage, under construction or rehab, model, and deleted.
- **Vacant – Down:** This is the total number of vacant units designated as unavailable in this floor plan, and the reason is "down."

- **Occupied – Total Occupied:** This is the total number of occupied units in this floor plan, which is the total of the next three columns (in this row).
- **Occupied – No NTV:** This is the total number of occupied units without a notice to vacate in this floor plan.
- **Occupied – NTV-NL:** This is the total number of occupied units on notice to vacate in this floor plan, and the units aren't pre-leased.
- **Occupied – NTV-L:** This is the total number of occupied units on notice to vacate in this floor plan, and the units are pre-leased.
- **Occupancy Percent:** This is the occupancy percentage of units in the floor plan. Calculated as:

  Total Occupied ÷ Total Units

  For the floor plan group, this is the total occupied units in the floor plan group divided by total units in the group.
- **Avg Market Rent:** This is the average market rent of units in the floor plan. Calculated as:

  Total Floor Plan Market Rent ÷ Total Units

  You can calculate the total floor plan market rent, which isn't shown in the report, by multiplying the total number of units by the average market rent.

  For the floor plan group, this is the total market rent for all units in the floor plan group divided by the number of units in the group.
- **Avg Leased Rent:** This is the average leased rent of occupied units in the floor plan, based on the total of CA-type charges in effect in scheduled billing. Calculated as:

  Total Leased Rent of Occupied Units in the Floor Plan ÷
  Total Occupied Units in the Floor Plan

  For the floor plan group, this is the total leased rent for all occupied units in the group divided by the group's total occupied units.
- **Net Leased Percent:** This is the percentage of leased units as of the current property date for each floor plan, floor plan group, and property. The report totals the number of vacant leased units, occupied units with no notice, and occupied units on notice, and then divides the total by the number of units in the floor plan, floor plan group, or property. Calculated as:

  Vacant Leased + No NTV + NTV-L ÷ Number of Units

  The **Availability summary** snapshot on the **Today** page also shows net leased percentages by floor plan.
- **Avg. Effective Rent:** This is the average effective rent for units in this floor plan included in this report. Calculated as:

  Total Floor Plan Effective Rent ÷ Total Units

  The total floor plan effective rent is calculated as:

Total Units × Avg. Effective Rent

The *All Units* report shows the total floor plan effective rent.

- **Total (Floor Plan Group):** This row appears after the last floor plan in the group and shows the floor plan group totals.
- **Property Totals:** This row appears after the last reported floor plan group and shows the property totals.

Availability/Exposure – (Current Property Date)

This snapshot shows the property's net exposure and controllable availability as of the current property date.

- **Status:** This lists the unit statuses that calculate net exposure and controllable availability.
- **Number:** This is the total number of units with this status as of the current property date. You can also view these totals in the **Property Totals** row of the *Unit Status* box score (the previous section).
  - **Total Vacant Units:** This is the total number of vacant units as of the current property date.
  - **Vacant Units Leased:** This is the total number of vacant units pre-leased. The number is deducted from total available units to determine net exposure.
  - **Occupied On-Notice:** This is the total number of occupied units on-notice to vacate (the units are not pre-leased).
  - **Occupied On-Notice Pre-Leased:** This is the total number of occupied units on-notice and pre-leased. The number is deducted from total available units to determine net exposure.
  - **Model/Admin:** This is the total number of units unavailable for some reason other than "Down." The reason a unit is unavailable is selected on the unit's **General information** page in property setup.
  - **Down:** This is the total number of units unavailable because they are "Down."
- **%:** This is the percentage of units with this status. Calculated as:

  Number ÷ Total Number of Units in the Property

  The **Property Totals** row of the *Unit Status* box score (the previous section) shows the total number of units.

- **Net Exposure – Number:** This is the total number of available units **not** committed to billing rent in the near future. The units are currently vacant and not pre-leased, or they are occupied and on notice and not pre-leased. Calculated as:

  (Total Vacant – Vacant Units Leased + Occupied On-Notice)
  – Occupied On-Notice Pre-Leased
- **Net Exposure – %:** This is the net exposure percentage. Calculated as:

Net Exposure ÷ Total Number of Units in the Property

- **Controllable Availability – Number:** This is the total number of units with controllable availability. Calculated as:

Net Exposure – Model/Admin – Down

- **Controllable Availability – %:** This is the controllable availability percentage. Calculated as:

Controllable Availability ÷ Total Number of Units in the Property

Vacant Units Make Ready Status – (Current Property Date)

This snapshot shows made ready and not made ready units as of the current property date.

- **Status:**
  - **Made Ready:** This is the total number of vacant units that are made ready. On the **Residential units** page in property setup, sort the list of units by **Make ready** status. The total number of vacant units with a make-ready date are included in this total.
  - **Not Made Ready:** This is the number of vacant units that are not made ready. (The units have no make-ready date entered.)
- **Number:** This is the total number of units in the property with this status.
- **%:** This is the percentage of units with this status. Calculated as:

Number of units that are Made Ready or Not Made Ready
÷ Total Vacant Units

- **Total Leased:** This is the total number of vacant units that are pre-leased.
- **Admin/Down:** This is the total number of administrative or down units. This is any unit that is flagged as unavailable at your site for any reason, other than "Deleted."
- **Total Available:** This is the total number of available units that are made ready or not made ready.
- **Total Vacant Units:** The report totals each column in this row.

Unit Designations – (Current Property Date)

This snapshot appears if you selected unit designations on the report's **Options** page.

- **Floor Plan:** This is the floor plan code. Each code has "Vac" and "Occ" line items.
- **(Unit Designation):** A separate column appears for each unit designation type that shows the total number of vacant and occupied units assigned to a designation type as of the current property date:
  - Active unit designations that have no units assigned are reported with zeroes.
  - Disabled unit designations that have units assigned are reported with asterisks.
  - Disabled unit designations that have no units assigned are excluded.

Leasing (by Floor Plan Group) – (Date Range)

This box score shows leasing statistics for the selected date range. The report subtotals each floor plan group and calculates a grand total for the property.

- **Floor Plan Group:** This is the name of the floor plan group.
- **Floor Plan:** This is the name of each floor plan in the group.
- **Units:** This is the total number of units in the floor plan.
- **Move-Ins:** This is the total number of residents that are due to move in during the report period for this floor plan and floor plan group.
- **Move-Outs:** This is the total number of residents that are due to move out during the report period for this floor plan and floor plan group.
- **Net Change:** This is the net change in occupancy in this floor plan and floor plan group. Calculated as:

  Move-Ins – Move-Outs
- **Units Reserved:** This is the number of units reserved in the leasing portal for this floor plan and floor plan group. The property uses the Affordable Housing Online Leasing Portal or Online Leasing and allows units to be reserved (as defined in CrossFire setup),
- **Signed Renewals:** This is the total number of leases that renewed during the reporting period for this floor plan and floor plan group.
- **Transferring Leases:** This is the total number of transfer requests entered during the reporting period for this floor plan and floor plan group. The specific residents are listed in the *Leases – Transferring Residents* section below.
- **Leases:** This is the total number of lease applications completed during the reporting period for this floor plan and floor plan group.
- **Canceled/Denied (Leases):** This is the total number of canceled or denied lease applications for this floor plan and floor plan group, less reversals during the reporting period. Calculated as:

  (Canceled + Denied Applications) – Reversals

  A reversal occurs when you undo a canceled or denied application through the **Undo Cancel/Undo Deny Application** feature. For example, if you cancel or deny five applications for floor plan A and undo three, the total of canceled/denied leases for floor plan A is two.
- **Net Leases:** This is net leases. Calculated as:

  Leases – Canceled/Denied
- **Waitlist:** This is the total number of lease applications for waitlisted applicants for the **Waitlist** (**Not Specified)** floor plan and floor plan group. These are new prospects that completed the **Waitlist** wizard during the reporting period.
- **Canceled/Denied (Waitlist):** This is the total number of canceled or denied waitlist applications for the **Waitlist** (**Not Specified)** floor plan and floor plan group, less reversals during the reporting period. Calculated as:

(Canceled + Denied Waitlist Applications) – Reversals

A reversal occurs when you undo a canceled or denied waitlisted applicant through the **Undo Cancel/Undo Deny Application** feature. For example, if you cancel or deny five waitlisted applicants and undo one, the total of canceled/denied leases is four.

- **Net Waitlist:** This is net waitlist. Calculated as:

  Waitlist – Canceled/Denied

- **Totals:** This row appears after the last floor plan group total, and it calculates property grand totals.

  You can view the reversals in the *Leases – Cancel/Deny/Reversals* section. Additionally, the *Exceptions* section on the last page of the report summarizes the net effect of reversed leases on the property's leasing numbers.

Leases

The following box scores show leasing activity for applicants, residents, and transferring residents for analysis. The occupancy category and the report date range appear in the upper-left corner of each section.

Leases – New Residents – Vacant Units Leased – (Date Range)

This box score shows the prospects (new applicants) who completed lease applications and selected vacant units in the reporting period.

- **Unit:** This is the unit number. If an applicant is on the waitlist, the unit number is Waitlist.
- **Floor Plan:** This is the floor plan code. If an applicant is on the waitlist, the floor plan code is Waitlist.
- **Name:** This is the name of the person who is the head of household.
- **Apply Date:** This is the application date. For new applicants, this is the property date on which the lease application was completed (using the **Apply now** or **Waitlist** wizard). For transferring residents, this is the property date on which the transfer request was completed, or the date the residents moved in (transferred to the new unit).
- **Move-In:** This is the scheduled move-in date.

  This column is substituted with the* Canceled Date *or* Denied Date *for leases that were canceled or denied.

- **Lease Term:** This is the lease term in months.
- **Market Rent:** This is the current market rent for this unit. This amount is established for the unit in setup. It is Base rent + Unit premium amenities + Additional charges and credits (defined on the **Change rent amounts by unit** page).
- **Lease Rent:** This is the actual rent in scheduled billing for the household. It is the total of all CA-type charges that are in effect during the report period.
- **Credits:** This is the total amount of concessions that are in effect in scheduled billing for the household. (Any P-type transaction, except payments (PZ).)

- **Other Charges:** This is the total amount of non-rent charges and credits that are in effect in scheduled billing for the household.
- **Deposits on Hand:** This is the total of all deposits currently held for the household.
- **Ad Source:** This is the traffic source that was selected when the guest card was added.
- **Leased By:** This is the name of the leasing consultant on the guest card.
  - **Effective Rent:** If the property uses transaction code groups in New OneSite and has an effective rent group in effect as of the report date, this amount is calculated as:

    [(Total Charges in Scheduled Billing in the Effective Rent Group × Number of Months in Lease Term)

    – (Concessions Posted in the Resident Ledger + Next Scheduled Concession)] ÷ Number of Months in Lease Term

    If no effective rent transaction code group is enabled or in effect, this is calculated as:

    [(Total CA-Type Charges in Scheduled Billing × Number of Months in Lease Term)

    – (Concessions Posted in the Resident Ledger + Next Scheduled Concession)] ÷ Number of Months in Lease Term

The effective rent calculation applies to the *All Units* (PDF and Excel) and *Box Score* reports.

Leases – New Residents – Occupied Units Pre-Leased – (Date Range)

This box score shows the prospects (new applicants) who completed lease applications and pre-leased occupied units in the reporting period.

Leases – Transferring Residents – (Date Range)

This box score shows the residents who completed transfer requests during the period. It reports similar information as the *Leases – New Residents – Vacant Units Leased* section, except it excludes **Ad Source** and includes these columns:

- **Transfer from Floor Plan:** This column prints in the *Leases - Transferring Residents* section only. This is the floor plan code the person is transferring from.
- **Transfer from Unit:** This column prints in the *Leases - Transferring Residents* section only. This is the number of the unit the person is transferring from.

Leases – Waitlist – (Date Range)

This box score shows the prospects who completed waitlist applications during the reporting period. It reports similar information as the *Leases – New Residents – Vacant Units Leased* section.

Leases – Cancel/Deny Reversals – (Date Range)

This conditional section appears if you reverse a canceled or denied lease application and the events occur in different reporting periods. For example, if you run the report for the current week (property date minus six days), the cancel/deny event must occur at least eight days prior, and the reversal (undo event) must occur during the seven-day date range. Similarly, if you run the report for the calendar month, the cancel/deny event must occur before the first day. The undo cancel/deny application event must occur from the calendar month to the current property date. If both events occur during the reporting period, the lease appears in the *Leases – New Residents – Vacant Units Leased* section.

This box score reports similar information as the *Leases – New Residents – Vacant Units Leased* section, except the **Cancel/Deny/Reversal Date** column replaces **Ad Source** and shows the date the canceled/denied lease was reversed.

Leases – Canceled (Date Range)

This box score lists the names of applicants with canceled leases during the reporting period. It reports similar information as the *Leases – New Residents – Vacant Units Leased* section, except the **Canceled Date** column replaces **Move-In**.

Leases – Denied – (Date Range)

This box score lists the names of applicants with denied leases during the reporting period. It reports similar information as the *Leases – New Residents – Vacant Units Leased* section, except the **Denied Date** column replaces **Move-In**.

Move-Ins – New Residents – (Date Range)

This box score shows the residents with move-in dates scheduled in the date range. It reports similar information as the *Leases – New Residents – Vacant Units Leased* section.

Move-Ins – Transferring Residents – (Date Range)

This box score shows the residents who transferred to a new unit in the reporting period (the move-in date falls in the date range). It reports similar information as the *Leases – New Residents – Vacant Units Leased* section.

Move-Outs – Exiting Residents – (Date Range)

This box score shows the move-outs in the reporting period.

- **Unit:** This is the unit number.
- **Floor Plan:** This is the floor plan code.
- **Name:** This is the head of household name.
- **Reason:** This is the reason for move out.
- **Notice Given:** This is the notice given date.
- **Move-Out:** This is the move-out date.
- **Days Notice:** This is the number of days notice.
- **Suff. Notice?:** This identifies whether sufficient notice was given. The number of days notice required for move-out is defined on the **Renewal settings** page in property setup.
- **Move-Out Charges:** These are the charges assessed to former residents after move-out.
- **Account Balance:** This is the current ledger balance.
- **Deposits on Hand:** This is the current deposit balance.

- **Pre-Leased:** This identifies whether or not the unit is pre-leased.
- **Market Rent:** This is the current market rent for the unit. Market rent includes unit premium amenities.
    - **Effective Rent:** If the property uses transaction code groups in New OneSite and has an effective rent group in effect as of the report date, this amount is calculated as:

      [(Total Charges in Scheduled Billing in the Effective Rent Group × Number of Months in Lease Term)

      – (Concessions Posted in the Resident Ledger + Next Scheduled Concession)] ÷ Number of Months in Lease Term

      If no effective rent transaction code group is enabled or in effect, this is calculated as:

      [(Total CA-Type Charges in Scheduled Billing × Number of Months in Lease Term)

      – (Concessions Posted in the Resident Ledger + Next Scheduled Concession)] ÷ Number of Months in Lease Term

  The effective rent calculation applies to the *All Units* (PDF and Excel) and *Box Score* reports.

Move-Outs – Transferring Residents – (Date Range)

This box score shows the residents who transferred to a new unit during the period. (Pending transfers appear in the next section, *Notice to vacate*.) It reports similar information as the *Move-Outs – Exiting Residents* section.

Notice to Vacate (NTV) – (Date Range)

This box score shows the residents on notice to move out or transfer, and any residents whose notices were canceled during the period. The double-dagger symbol ‡ appears next to the unit number of a resident whose notice was canceled.

This section reports similar information as the *Move-Outs – Exiting Residents* section, except the **Planned Move-Out** column replaces **Move-Out** and shows the scheduled move-out date. For residents whose notices were canceled, the planned move-out date appears for history purposes.

Vacancies (Current Property Date)

This snapshot shows vacancy totals as of the current property date.

- **Unit:** This is the unit number.
- **Floor Plan:** This is the floor plan code.
- **Move-Out:** This is the move-out date.
- **Reason:** This is the reason for move-out.
- **Pre-Leased:** This identifies whether or not the unit has been leased.
- **Make Ready:** This is the date the unit was made ready.
- **Market Rent:** This is the current market rent for the unit.

- **Days Vacant:** This is the number of days the unit has been vacant. An asterisk (*) appears if there is no former move-out date or the unit has a make-ready date from setup. OneSite is unable to calculate days vacant without this information.
- **Estimated Vacancy Cost:** This is the market rent divided by the average number of days in a month (365 ÷ 12 = 30.42). The daily rate is multiplied by the number of days vacant to get the estimated vacancy cost. Calculated as:

  (Market Rent ÷ 30.42) × Days Vacant

  - **Effective Rent:** If the property uses transaction code groups in New OneSite and has an effective rent group in effect as of the report date, this amount is calculated as:

    [(Total Charges in Scheduled Billing in the Effective Rent Group × Number of Months in Lease Term)

    – (Concessions Posted in the Resident Ledger + Next Scheduled Concession)] ÷ Number of Months in Lease Term

    If no effective rent transaction code group is enabled or in effect, this is calculated as:

    [(Total CA-Type Charges in Scheduled Billing × Number of Months in Lease Term)

    – (Concessions Posted in the Resident Ledger + Next Scheduled Concession)] ÷ Number of Months in Lease Term

    The effective rent calculation applies to the *All Units* (PDF and Excel) and *Box Score* reports.

Contact Level Details Report

Unified Platform ≡ Navigation Menu > Reports > Manage Reports > Residents/Management (Report Area) > Contact Level Details

This is a custom report. See Managing Custom HTML Reports for more information about configuring custom reports.

The *Contact Level Details* report displays a contact's personal information entered when the person was added to the account or the information was edited. The report also includes unit access information found on the **Miscellaneous** tab of the account.

You select the information reported, the order of the columns, and the sort. You can rename column headings and the report title. For example, you can create an Excel report that shows contact information. You could then copy and paste the email addresses to an outgoing message that you send by email. You can also create another report that shows emergency contact information.

Contact Level Details Options

Unified Platform ≡ Navigation Menu > Reports > Manage Reports > Residents/Management (Report Area) > Contact Level Details

The *Contact Level Details* report provides the following options used to select the information in the report and determine the report format.

Report Options

- **Generate Now:** To generate the report immediately, leave this option selected.
- **Schedule for Later:** To generate the report at a future date or time, select this option, and then perform the following:
  - Click the **Calendar** in the **Date** field, and then select the date you want to run the report.
  - Use the **Time** drop-down list to select the time when you want to generate the report. You can select any time of day in 30-minute increments.
- **Format:** Choose the report format. Available file types include:
  - **Standard XML:** To generate the report as an XML file, select this option. See **Viewing Completed Reports or Extracts** for information on viewing an XML report.
  - **HTML Report:** To generate and view the report in HTML, select this option. See Viewing Completed Reports or Extracts for information on viewing an HTML report.
  - **Excel:** To generate the report as an XLS file, select this option. Reports generated as Excel files are downloaded to your device automatically when completed.

  - **CSV Export:** To generate the report as a CSV file, select this option. Reports generated in CSV format automatically download when completed.
- **Select Property:** Use this drop-down list to select the properties. You can scroll through the list or type a few characters of the property name in the **Search** field to find and select properties. Click the × **Clear** button in the **Search** field to type a new value. If you have access to only one property, the property is selected by default.
- **Send Email to External Recipient(s) upon Completion:** If you have the "External Report Distribution" right, you can type an email address in this field to send an email message to people outside of your organization. Use a semicolon to separate multiple email addresses. After the report is generated, an email message with a link to the report is sent.
- **Send Notification to Internal User(s) Upon Completion:** To send a notification to an internal user that the report is complete, use this drop-down list. You can select multiple users by selecting the check box beside each user you want to include.
- **Send File to Cloud Service upon Completion:** If you have the "External Report Distribution" right, you can use this drop-down list to select the cloud service account to which you want to send the report. After the report is generated, it is exported to the cloud service account's storage.

This is a custom report. See Managing Custom HTML Reports for more information about configuring custom reports.

Contact Level Details Columns

Unified Platform: ≡ Navigation Menu > Reports > Manage Reports > Last Run Date > View Report

For *Contact Level Details* reports, a column appears for each selected field. The column order is based on how the fields were listed top to bottom in the **Edit Columns** pane on the report's **Options** page.

Required Columns

- **Resident Member ID:** This is the system-assigned ID that uniquely identifies the resident in the OneSite system.

Access Information

If selected, the following information is reported as it appears in the *Access information* section of the **Miscellaneous** tab.

- **Additional Comments**
- **Alarm Code**
- **Permission Given to Enter?:** If this is Yes, a service technician can enter the unit at any time. If this is No, a service technician can enter the unit by appointment only.
- **Pet Warnings**

Current Employment

If selected, the following information is reported as it appears in the *Current employment* section of the contact's **Employment** tab.

- **Current Employment Additional Annual Income**
- **Current Employment Address**
- **Current Employment Email**
- **Current Employment Estimated Annual Income**
- **Current Employment Fax**
- **Current Employment Job Title**
- **Current Employment Job Type**
- **Current Employment Length of Employment**
- **Current Employment Miles to Work**
- **Current Employment Name**
- **Current Employment Phone**
- **Current Employment Start Date**
- **Current Employment Supervisor Name**

Custom Fields

If selected, the report prints the values of custom fields located on the contact information pages.

- If a field is encrypted and you generated the report in the XML or CSV format, you can use the RealPage XML/CSV Decryption Utility to decrypt these values. You must have saved the XML or CSV report to your computer's hard disk without opening it, and then run the decryption utility. This allows the system to generate a file that shows the encrypted values in plain text. The new report is saved in the same location as the original report with "_decrypted" appended to the file name.

Demographics

If selected, the following information is reported as it appears in the *Demographics* section on the contact's **General information** tab.

- **Age:** This is the person's age based on the given date of birth.
- **Citizenship:** This is the person's country of citizenship.
- **Claims Exempt Income**
- **Claims Zero Income**
- **Contact Primary Language:** This is the person's primary language. To view the person's primary language in the report, in Unified Platform Settings the company must have:
  - Enabled this field on the **Guest Card** page.
  - Activated the **Ask for Language** switch on the **Demographics** page.

    - Enabled the household language on the **Demographics** page.
- **Ethnicity:** This is the person's ethnic origin.
- **Gender:** This is the person's gender.
- **Hearing Impaired**
- **Impaired**
- **Job Type**
- **Joint Dependent**
- **Marital Status:** This is the person's marital status.
- **Mobility Impaired**
- **Race**
- **Student**
- **Vision Impaired**

Emergency Contact

If selected, the following information is reported as it appears in the contact's **Emergency contact** tab. A check box field that is enabled (selected) has a "Yes" value on the report; otherwise, it is "No."

- **Emergency Contact Address**
- **Emergency Contact Allowed Access**
- **Emergency Contact Cell Number**
- **Emergency Contact Email**
- **Emergency Contact Fax**
- **Emergency Contact Home Number**
- **Emergency Contact Name**
- **Emergency Contact Relationship**
- **Emergency Contact Work Number**

General Information

If selected, the following information is reported as it appears on the **Activity** tab on the person's **Account Profile** page. A check box field that is enabled (selected) has a "Yes" value in the report; otherwise, it is "No."

- **Address**
- **Address Type**
- **Cell Phone**
- **Co-signer**
- **Criminal History**
- **Email**

- **Employee**
- **Fax**
- **First Name**
- **Former Last Name**
- **Forwarding Address:** This is the person's forwarding address entered when notice is given, at move-out, or when completing the FAS.
- **Generate Certificate of Rent Paid**
- **Guarantor**
- **Home Phone**
- **Last Name**
- **Lease Signer**
- **Length of Stay:** If this is blank, the person still lives in the unit (no move-out date has been entered). Otherwise, this is the length of time the person lived in the unit (in number of years, months, and days). It is based on the move-in and move-out dates. (A move-out date can be entered for any household member except the head of household.)
- **Middle Name**
- **Occupant**
- **Opt In for Email Notifications:** This field is available if your property has enabled email notifications. This column is Yes or No, based on whether the contact has opted in for email notifications (as selected on the contact's **General Information** tab).

  To filter the report to show only people who have or haven't opted in, select the field, select **Edit Column/Report Properties**, and then select **Yes** or **No**. Leave **N/A** selected to include everyone.
- **Relationship (Household Status)**
- **Resident Since**
- **Suffix**
- **Work Phone**

Lease/Household Information

If selected, the following information is reported as it appears on the **Summary** or **Lease details** tab.

- **Applied Date:** This is the lease application date.
- **Contact-Level Status:** This is the contact's status relative to the lease (*Current* or *Former*). This can be different from the lease status if the contact has moved out and the lease is current. To determine if a contact is current or former, the system checks the value in the *** (Asterisk)** column in the *Contacts* section on the **Summary** tab. If the value is **S**, **C**, or **G**, the contact is a lease signer, cosigner, or guarantor, and the report reflects the contact status as

Current. If the value is **F**, the contact has moved out, and the report shows the status as *Former*.

- **Custom Payment Plan Name**
- **Household Language:** This is the person's primary language. To view the person's primary language in the report, in Unified Platform Settings the company must have:
  - Enabled this field on the **Guest Card** page.
  - Activated the **Ask for Language** switch on the **Demographics** page.
  - Enabled the household language on the **Demographics** page.
- **Household Name:** This is the head of household name.

  To clearly identify a household in the report, always select the **Household Name** *and* **Unit #** *fields from the* **Lease/Household Information** *folder.*

- **Lease End Date**
- **Lease Start Date**
- **Lease-Level Occupancy Status:** This is the lease status. For example, *Current resident*, *Applicant*, or *Former Applicant*.
- **Ledger Balance:** This is the account balance shown in the upper-left heading of the person's **Account Profile** page. It is the resident ledger balance, plus any subjournal balance that is set up to be included.
- **Move-In Date**
- **Payment Plan Name**
- **Unit #**

Screening

This folder is displayed if your property uses Screening.

- **Screening Conditions Used:** If any conditions are assigned to the decision for this applicant, then this is a list of the conditions assigned.
- **Screening Current/Historical:** If this is the most recent screen, this is Current. If this is a prior screen and other screens have been processed, this is Historical.
- **Screening Decision:** This is the initial decision assigned to the application. Decisions can be approved, approved with conditions, or denied.
- **Screening Decision By:** This is the name of the OneSite user who ran the screen.
- **Screening Decision Date:** This is the date the original decision was assigned to the application.
- **Screening Override Decision:** If the decision for an application has been overridden, then this is a list of the current reasons for overriding a decision.

- **Screening Override Decision Factors:** If the original decision assigned to the application is denied, this is the override decision. Override decisions can be approved final, approved w/conditions final, or denied final.
- **Screening Result:** This is the traffic light result that the application received (if any). Results can be green, yellow, red, or unknown. Applications that pass receive a green light, applications that pass with conditions receive a yellow light, and applications that fail receive a red light.
- **Screening Score:** This is the number of points that the application received by the scoring process.
- **Screening Submission Date:** This is the system date the application was submitted to Screening.

Other Previous Residence

If selected, the following information is reported as it appears in the *Other previous residence* section of the contact's **Previous residence** tab.

- **Other Previous Residence Address**
- **Other Previous Residence Email**
- **Other Previous Residence Fax**
- **Other Previous Residence Length of Residency**
- **Other Previous Residence Manager/Contact**
- **Other Previous Residence Move-in Date**
- **Other Previous Residence Move-out Date**
- **Other Previous Residence Phone**
- **Other Previous Residence Reason for Leaving**
- **Other Previous Residence Rent Amount**
- **Other Previous Residence Rent/Own/N/A**
- **Other Previous Residence Name**

Pets

If selected, the following information is reported as it appears in the *Pets* section of the **Miscellaneous** tab of the person's "at a glance" page.

- **Pet Age**
- **Pet Breed**
- **Pet Color**
- **Pet Gender**
- **Pet Name**
- **Pet Notes**
- **Pet Size (in pounds)**

- **Pet Start Date**
- **Pet Type**

Power of Attorney

If selected, the following information is reported as it appears in the *Power of Attorney* section on the contact's **Power of Attorney** tab.

- **Power of Attorney Address Ln 1**
- **Power of Attorney Address Ln 2**
- **Power of Attorney Allow Access**
- **Power of Attorney Cell Phone**
- **Power of Attorney City**
- **Power of Attorney Country**
- **Power of Attorney Email**
- **Power of Attorney Fax**
- **Power of Attorney Home Phone**
- **Power of Attorney Name**
- **Power of Attorney Relationship**
- **Power of Attorney State**
- **Power of Attorney Work Phone**
- **Power of Attorney ZIP**

Previous Employment

If selected, the following information is reported as it appears in the *Previous employment* section on the contact's **Employment** tab.

- **Previous Employment Address**
- **Previous Employment Name**
- **Previous Employment Email**
- **Previous Employment End Date**
- **Previous Employment Estimated Annual Income**
- **Previous Employment Fax**
- **Previous Employment Job Title**
- **Previous Employment Job Type**
- **Previous Employment Length of Employment**
- **Previous Employment Phone**
- **Previous Employment Reason for Living**
- **Previous Employment Start Date**
- **Previous Employment Supervisor Name**

Previous Residence

If selected, the following information is reported as it appears in the *Previous residence* section of the contact's **Previous residence** tab.

- **Previous Residence Address**
- **Previous Residence Email**
- **Previous Residence Fax**
- **Previous Residence Length of Residency**
- **Previous Residence Manager/Contact**
- **Previous Residence Move-in Date**
- **Previous Residence Move-out Date**
- **Previous Residence Phone**
- **Previous Residence Reason for Leaving**
- **Previous Residence Rent Amount**
- **Previous Residence Rent/Own/N/A**
- **Previous Residence Name**

Rental History

If selected, the following information is reported as it appears in the *Rental history* section of the contact's **Previous residence** tab. A check box field that is enabled (has a check mark) has a "Yes" value; otherwise, it is "No."

- **Has Been Evicted?**
- **Has Been Sued for Property Damages?**
- **Has Been Sued for Rent?**
- **Has Broken Lease?**

Vehicles

If selected, the following information is reported as it appears in the *Vehicles* section of the **Miscellaneous** tab of the person's "at a glance" page.

- **Vehicle Color**
- **Vehicle License Plate**
- **Vehicle License State**
- **Vehicle Make**
- **Vehicle Model**
- **Vehicle Model Year**
- **Vehicle Notes**
- **Vehicle Parking Assignment**
- **Vehicle Type**

Current Renewal Status Report

Unified Platform ≡ Navigation Menu > Reports > Manage Reports > Residents/Management (Report Area) > Current Renewal Status

The *Current Renewal Status* report provides a listing of leases that have expired or that are due to expire within the number of days specified at report submission. Leases that end on or between the report dates are eligible for inclusion on the report.

For each lease, the report shows lease rent (current CA-type charges in scheduled billing), market rent, and other charges (any non-rent charges in scheduled billing that are in effect). Additionally, it lists the amount of the last rental increase (if any), the renewal status, lease offers, and the leasing consultant that is managing the renewal.

Current Renewal Status Options

Unified Platform ≡ Navigation Menu > Reports > Manage Reports > Residents/Management (Report Area) > Current Renewal Status

The *Current Renewal Status* report provides the following options used to select the information in the report and determine the report format.

Report Options

- **Generate Now:** To generate the report immediately, leave this option selected.
- **Schedule for Later:** To generate the report at a future date or time, select this option, and then perform the following:
  - Click the **Calendar** in the **Date** field, and then select the date you want to run the report.
  - Use the **Time** drop-down list to select the time when you want to generate the report. You can select any time of day in 30-minute increments.
- **Format:** Choose the report format. Available file types include:
  - **PDF:** To generate the report as a PDF file, select this option. Reports generated as PDF files appear on a new browser tab when completed.
  - **Word:** To generate the report as a DOC file, select this option. Reports generated in Word format automatically download when completed.
  - **Excel:** To generate the report as an XLS file, select this option. Reports generated as Excel files are downloaded to your device automatically when completed.
- **Select Property:** Use this drop-down list to select the properties. You can scroll through the list or type a few characters of the property name in the **Search** field to find and select properties. Click the ✕ **Clear** button in the **Search** field to type a new value. If you have access to only one property, the property is selected by default.

- **Send Email to External Recipient(s) upon Completion:** If you have the "External Report Distribution" right, you can type an email address in this field to send an email message to people outside of your organization. Use a semicolon to separate multiple email addresses. After the report is generated, an email message with a link to the report is sent.
- **Send Notification to Internal User(s) Upon Completion:** To send a notification to an internal user that the report is complete, use this drop-down list. You can select multiple users by selecting the check box beside each user you want to include.
- **Send File to Cloud Service upon Completion:** If you have the "External Report Distribution" right, you can use this drop-down list to select the cloud service account to which you want to send the report. After the report is generated, it is exported to the cloud service account's storage.

Parameters

- **Include Renewal Summary:** Activate this switch to include the renewal summary.
- **Include Signed Renewals:** Activate this switch to include signed renewals in the report. If you do not activate the switch, signed renewals are excluded from the report.
- **Renewal Status:** This option controls whether all leases are included in the report or only leases with a particular renewal status. The following options are available:
  - **All:** Select this option to include all leases, regardless of the renewal status.
  - **MTM:** This option includes only month-to-month leases. (These are leases with one month lease terms.)
  - **NTV:** This option includes only leases that are on notice to move out. (Leases on notice to transfer are excluded.)
  - **Pending Renewal:** This status includes only leases that have renewal offers generated.
  - **Pending Renewal – Renewal Offer Ltr:** This status includes pending renewal leases that have offer letters generated.
  - **Pending Renewal – 1st Reminder Ltr:** This status includes pending renewal leases that have a first reminder letter generated.
  - **Pending Renewal – 2nd Reminder Ltr:** This status includes pending renewal leases that have a second reminder letter generated.
  - **Pending Renewal – 3rd Reminder Ltr:** This status includes pending renewal leases that have a third reminder letter generated.
  - **Pending Renewal — 4th Reminder Ltr:** This status includes pending renewal leases that have a fourth reminder letter generated.
  - **Renewed:** This status includes only renewed leases in the report. These are leases of residents who have completed the **Renew now** wizard.
  - **Transferring:** This status includes only leases with transfer requests scheduled during the report period. (The requests were created through the **Transfer request** wizard in resident management.)

    - **Unknown:** This status includes only leases for which no renewal offers have yet been generated.

- **Days After Property Date Leases Are Due to Expire:** Use this option controls the number of days beyond the current property date to select expiring leases. For example, if you enter 30 and the property date is 11/1/22, leases that expired or are due to expire between 11/1/22 – 12/01/22 are eligible for inclusion in the report. (The date range includes the property date, plus the next 30 days.)

Current Renewal Status Columns

Unified Platform: ≡ Navigation Menu > Reports > Manage Reports > Last Run Date > View Report

The company and property names appear at the top of the report followed by the report title and the report period. The report period is the current property date through the number of days entered at the report parameters page. Each of the columns in the report is described below, from left to right on the page.

(Detail)

- **Unit:** This is the building number (if applicable) and the unit number.
- **Floorplan**: This is the floor plan name.
- **Name:** This is the head of household name.
- **Phone:** This is the head of household’s phone number.
- **Move In:** This is the move-in date.
- **Lease End:** This is the date the current lease ends or the date the most recent lease ended.
- **Lease Rent:** This is the current rent amount in scheduled billing.
- **Market Rent:** This is the current market rent for the unit.
- **Other Charges:** This is the total amount of non-rent charges in scheduled billing in effect as of the property date.
- **Other Credits:** This is the total amount of credits in scheduled billing in effect as of the property date.
- **Last Rent Change Amount:** This is the difference between old rent in scheduled billing and new rent in scheduled billing as of the last time there was a rent increase.
- **Do Not Renew:** If an “X” is displayed in this check box, the lease is flagged as “do not renew.”
- **Late/NSF:** This is the number of times the resident has paid late and had a check returned for non-sufficient funds. For example, “3/1” identifies there were three late payments and one NSF check for the resident.
- **Renewal Status:** This is the renewal status of the household.
    - **NTV:** The resident has given notice to move-out. The lease has an NTV status, even if the scheduled move-out date is after the report end date.

- **MTM:** The lease has a one-month lease term or the lease has expired.
- **Renewed:** The resident completed the renewal process and renewed during the report period.
- **Pending renewal:** The resident has renewal offers, but no offer letters. A check mark appears in the **Offers made** column of the **Renewals** snapshot at the **Today** page for these leases.
- **Pending renewal – Renewal offer ltr:** The resident has renewal offers and the offer letter has been generated. A check mark appears in the **Offer letter** column of the **Renewals** snapshot at the **Today** page for these leases.
- **Pending renewal – 1st reminder ltr:** The resident has the offer letter and the first reminder letter has been generated. A check mark appears in the **1st reminder** column of the **Renewals** snapshot at the **Today** page for these leases.
- **Pending renewal – 2nd reminder ltr:** The resident has the offer letter and two reminder letters have been generated. A check mark appears in the **2nd reminder** column of the **Renewals** snapshot at the **Today** page for these leases.
- **Pending renewal – 3rd reminder ltr:** The resident has the offer letter and three reminder letters have been generated. A check mark appears in the **3rd reminder** column of the **Renewals** snapshot at the **Today** page for these leases.
- **Pending renewal – 4th reminder ltr:** The resident has the offer letter and four reminder letters have been generated. A check mark appears in the **4th reminder** column of the **Renewals** snapshot at the **Today** page for these leases.
- **Transferring:** The resident has given notice to transfer.
- **Unknown:** This is a potential renewal with no lease offers, NTV, or MTM status. The **Offers made** column of the **Renewals** snapshot at the **Today** page is blank for these leases.

Lease Offers

- **Lease Start:** This is the proposed renewal lease start date of each lease offer or quote generated for this household.
- **Increase:** This is the proposed rent increase for this renewal lease.
- **Lease Rent:** This is actual rent based on the renewal lease terms.
- **Other Charges:** This is other charges according to renewal lease terms.
- **Term:** This is the lease term in number of months for each lease offer.
- **Leasing Cons.:** This is the leasing consultant selected on the renewal offer (for residents with a pending renewal status) or the **Choose offer** page within the **Renew now** wizard (for renewals). If this is blank, “House” was selected as the leasing consultant when the offer was generated or the lease was renewed, or the leasing consultant that was selected is no longer valid in OneSite.

After an offer is accepted and the lease is renewed (using one of the offers), the report includes only the accepted offer information.

Renewal Summary

This section summarizes information by floor plan. It appears in the report if you chose to include it on the report's **Parameters** page. The report totals each of the columns, with the exception of the last five columns.

- **Floor Plan:** This is the name of the floor plan.
- **Total Opportunities:** This is the total number of expiring leases for this floor plan.
- **Renewed:** This is the total number of renewals for this floor plan.
- **Pending No Ltr:** This is the total number of leases in this floor plan that have renewal offers, but no offer letters. The counts come from the **Renewal Status** column (in the detail section), summed by floor plan.
- **Pending Ltr:** This is the total number of pending renewal leases in this floor plan that have offer letters. The counts come from the **Renewal Status** column (in the detail section), summed by floor plan.
- **Pending 1st Ltr:** This is the total number of pending renewal leases in this floor plan that have offer letters and first reminder letters. The counts come from the **Renewal Status** column (in the detail section), summed by floor plan.
- **Pending 2nd Ltr:** This is the total number of pending renewal leases in this floor plan that have offer letters and two reminder letters. The counts come from the **Renewal Status** column (in the detail section), summed by floor plan.
- **Pending 3rd Ltr:** This is the total number of pending renewal leases in this floor plan that have offer letters and three reminder letters. The counts come from the **Renewal Status** column (in the detail section), summed by floor plan.
- **Pending 4th Ltr:** This is the total number of pending renewal leases in this floor plan that have offer letters and four reminder letters. The counts come from the **Renewal Status** column (in the detail section), summed by floor plan.
- **MTM:** This is the number of potential renewals that will be going month-to-month (MTM) when the lease expires for this floor plan.
- **NTV:** This is the number of potential renewals with a lease status of NTV (notice to vacate) for this floor plan.
- **Transferring:** This is the number of pending transfers for this floor plan.
- **Unknown:** This is the number of potential renewals with no renewal status, NTV, or MTM agreement for this floor plan.
- **Do Not Renew:** This is the total number of "Do not renew" leases for this floor plan.
- **Avg. Term:** This is the average lease term of renewal leases for this floor plan.
- **Avg. Leased:** This is the average lease rent of renewal leases for this floor plan:

Total lease rent for renewal leases for this floor plan ÷ Renewed

- **Avg. Market:** This is the average market rent for renewed leases for this floor plan:

Total market rent renewal leases for this floor plan ÷ Renewed

- **Variance:** This is the difference between average lease rent and average market rent for this floor plan:

Avg. Leased - Avg. Market

- **Renewal %:** This is the percentage of leases that renewed for this floor plan during the report period:

Renewed ÷ Total Opportunities

(Total Row)

- **Total Avg. Term:** This is the average lease term for all renewals:

Total lease term months for all renewals ÷ Total Renewed

- **Total Avg. Leased:** This is average lease rent for all renewals:

Total lease rent for all renewals ÷ Total Renewed

- **Total Avg. Market:** This is average market rent for all renewals:

Total market rent for all renewals ÷ Total Renewed

- **Total Variance:** This is the difference between total average lease rent and total average market rent:

Total Avg. Leased - Total Avg. Market

- **Total Renewal %:** This is the percentage of leases that renewed during the report period:

Total Renewed ÷ (Grand) Total Opportunities

Household Member Listing by Age Report

Unified Platform ≡ Navigation Menu > Reports > Manage Reports > Residents/Management (Report Area) > Household Member Listing by Age

The *Household Member Listing by Age* report lists the ages of household members and summarizes the counts by age, gender, and household status. This report is useful if you donate school supplies to school-aged residents at your property through a local non-profit organization. The report will allow you to determine which residents could receive school supplies.

Household Member Listing by Age Options

Unified Platform ≡ Navigation Menu > Reports > Manage Reports > Residents/Management (Report Area) > Household Member Listing by Age

The *Household Member Listing by Age* report provides the following options used to select the information in the report and determine the report format.

Report Options

- **Generate Now:** To generate the report immediately, leave this option selected.
- **Schedule for Later:** To generate the report at a future date or time, select this option, and then perform the following:
    - Click the **Calendar** in the **Date** field, and then select the date you want to run the report.
    - Use the **Time** drop-down list to select the time when you want to generate the report. You can select any time of day in 30-minute increments.
- **Format:** Choose the report format. Available file types include:
    - **Standard XML:** To generate the report as an XML file, select this option. See **Viewing Completed Reports or Extracts** for information on viewing an XML report.
    - **HTML Report:** To generate and view the report in HTML, select this option. See Viewing Completed Reports or Extracts for information on viewing an HTML report.
    - **Excel Export:** To generate the report as an XLS file, select this option. Reports generated in Excel format automatically download when completed.
    - **CSV Export:** To generate the report as a CSV file, select this option. Reports generated in CSV format automatically download when completed.
- **Select Property:** Use this drop-down list to select the properties. You can scroll through the list or type a few characters of the property name in the **Search** field to find and select properties. Click the × **Clear** button in the **Search** field to type a new value. If you have access to only one property, the property is selected by default.
- **Send Email to External Recipient(s) upon Completion:** If you have the “External Report Distribution” right, you can type an email address in this field to send an email message to

people outside of your organization. Use a semicolon to separate multiple email addresses. After the report is generated, an email message with a link to the report is sent.

- **Send Notification to Internal User(s) Upon Completion:** To send a notification to an internal user that the report is complete, use this drop-down list. You can select multiple users by selecting the check box beside each user you want to include.
- **Send File to Cloud Service upon Completion:** If you have the “External Report Distribution” right, you can use this drop-down list to select the cloud service account to which you want to send the report. After the report is generated, it is exported to the cloud service account’s storage.

Parameters

- **Sort By:** Use the drop-down list to select a sort method for the report. By default, the report will sort data by unit number, but you can choose a different sort method from the drop-down list. You can sort data by household name, contact last name, contact first name, or age.
- **Account Status:** This option controls who is included in the report, based on a person’s occupancy status. You can select multiple statuses.
  - **Applicant:** Select this check box to include applicants in the report.
  - **Approved Applicant:** Select this check box to include approved applicants in the report.
  - **Former Applicant:** Select this check box to include canceled or rejected applicants in the report.
  - **Pending Resident:** Select this check box to include pending residents in the report.
  - **Current Resident:** Select this check box to include current residents in the report.
  - **Former Resident:** Select this check box to include former residents in the report.
- **Household Member Select:** Select the check boxes to include specific household members in the report. By default, the report will include all eligible household members, regardless of the relationship.
- **Include Inactive Household Members:** Activate this switch if you want to include all members with Inactive status in the report. If a person’s “inactive date” is after the current property date, which is the report “as of” date, the member will appear in the report, regardless of this setting. “Inactive date” refers to the move-out date entered for a contact on a current lease.
- **Filter Age Range:** Activate this switch to filter the report by age.

Household Member Listing by Age Columns

Unified Platform: ≡ Navigation Menu > Reports > Manage Reports > Last Run Date > View Report

For each contact, the following information is printed in columns from left to right on the page.

- **Unit #:** This is the building (if the property uses buildings) and unit number.
- **Address:** This is the unit or alternate address. (The alternate address is specified at the **General information** page when you edit the person's contact information.)
- **Household Name:** This is the head of household name as specified in the **Household** field at the **Edit lease details** page.
- **First Name:** This is the household member's first name as specified at the **General information** page.
- **Last Name:** This is the household member's last name as specified at the **General information** page.
- **Relationship (Household Status):** This is the household member's relationship to the head of household as specified at the **General information** page.
- **Gender:** This is the household member's gender as specified at the **Demographics** page (accessed when you edit the contact). If no gender is specified, this is N/A.
- **Age:** This is the household member's age as shown at the **Demographics** page. The age is calculated by the system, based on the contact's date of birth. If no date of birth is recorded, this is 0 (zero).
- **Total Members:** This row shows the total number of household members on the report.

Summary by Age

- **(Age):** This lists each age that is reported.
- **(Count):** For the listed age, this is the total number of household members on the report that are this age.
- **Total:** This is the total number of household members reported, which matches the total shown in the **Total Members** row in the detail section.

Summary by Gender

- **Female:** Of the total number of household members reported, this is the total number whose gender is female.
- **Male:** Of the total household members reported, this is the total number whose gender is male.
- **N/A:** Of the total household members reported, this is the total number that has no gender specified.
- **Total:** This is the total number of household members reported, which matches the total shown in the **Total Members** row in the detail section.

Summary by Relationship

- **(Relationship):** This lists each relationship or household status that is reported.
- **(Count):** For the listed relationship, this is the total number of household members on the report that have this status.
- **Total:** This is the total number of household members reported, which matches the total shown in the **Total Members** row in the detail section.

Lease Details Report

Unified Platform ≡ Navigation Menu > Reports > Manage Reports > Residents/Management (Report Area) > Lease Details

This is a custom report. See Managing Custom HTML Reports for more information about configuring custom reports.

The *Lease Details* report can provide unit, lease, and final account information for applicants and residents, based on the fields selected when the report is generated. You can find most of the information on the **FAS** and **Lease Details** tabs of the person's **Account Profile** page.

Similar to an SDE extract, you control the data that is included in the report. For example, you may want to generate a report that lists the utilities the resident pays, fee amounts (such as NSF or early termination), whether a resident's lease can be renewed, and whether check payments and money order payments are accepted.

In addition to field selection, you control how data is sorted, the sort order, and the order of the columns. You can also rename column headings and the report title if needed.

Lease Details Options

Unified Platform ≡ Navigation Menu > Reports > Manage Reports > Residents/Management (Report Area) > Lease Details

The *Lease Details* report provides the following options used to select the information in the report and determine the report format.

Report Options

- **Generate Now:** To generate the report immediately, leave this option selected.
- **Schedule for Later:** To generate the report at a future date or time, select this option, and then perform the following:
  - Click the **Calendar** in the **Date** field, and then select the date you want to run the report.
  - Use the **Time** drop-down list to select the time when you want to generate the report. You can select any time of day in 30-minute increments.
- **Format:** Choose the report format. Available file types include:
  - **HTML Report:** To generate and view the report in HTML, select this option. See Viewing Completed Reports or Extracts for information on viewing an HTML report.
  - **Excel:** To generate the report as an XLS file, select this option. Reports generated as Excel files are downloaded to your device automatically when completed.
  - **CSV Export:** To generate the report as a CSV file, select this option. Reports generated in CSV format automatically download when completed.

- **Select Property:** Use this drop-down list to select the properties. You can scroll through the list or type a few characters of the property name in the **Search** field to find and select properties. Click the **Clear** button in the **Search** field to type a new value. If you have access to only one property, the property is selected by default.
- **Send Email to External Recipient(s) upon Completion:** If you have the "External Report Distribution" right, you can type an email address in this field to send an email message to people outside of your organization. Use a semicolon to separate multiple email addresses. After the report is generated, an email message with a link to the report is sent.
- **Send Notification to Internal User(s) Upon Completion:** To send a notification to an internal user that the report is complete, use this drop-down list. You can select multiple users by selecting the check box beside each user you want to include.
- **Send File to Cloud Service upon Completion:** If you have the "External Report Distribution" right, you can use this drop-down list to select the cloud service account to which you want to send the report. After the report is generated, it is exported to the cloud service account's storage.

This is a custom report. See Managing Custom HTML Reports for more information about configuring custom reports.

Lease Details Columns

Unified Platform: ≡ Navigation Menu > Reports > Manage Reports > Last Run Date > View Report

For *Lease Detail* reports, a column appears for each selected field. The column order is based on how the fields were listed from top to bottom in the **Edit Columns** pane on the report's **Options** page.

Required Columns

- **Lease ID:** This is the system-assigned lease ID that uniquely identifies the lease.

Lease Detail

The following columns show information found on the person's **Lease Information** tab on the **Lease Details** tab on the **Account Profile** page. The values reported are as of the current property date.

- **1st Advertising Source:** This is the first advertising source designated on the lease that made the resident aware of the property initially.
- **2nd Advertising Source:** This is the second advertising source (if any) on the lease.
- **Allow Partial Payments for the Household:** This is **Yes** if the property has activated this special/collection status for the resident. It overrides the global Payments setting, allowing the household to make partial payments on their deferred balance. Otherwise, the status is **No**.

- **Bill Resident Setup Fee:** This is **Yes** if the property bills the household a setup fee for utilities, based on the **Lease Information** page. Otherwise, the status is **No**.
- **Billing Date:** This date is the utility billing start date for the household.
- **Credit Optimizer Additional Deposit:** This option is valid if your property uses Screening with Credit Optimizer in conjunction with Performance Analytics. Credit Optimizer must be enabled and the **Advanced Settings** should be configured in Screening setup to **Enable Additional Deposit**. A Credit Optimizer additional deposit is then enabled only on the **Decision** page when an application has passed with conditions, and occupancy requirements for Credit Optimizer have been met. In other words, this option is available to applicants who would not normally have passed the screen, but passed due to the Credit Optimizer settings. In this instance, the additional Credit Optimizer deposits can be shown by selecting this column. This deposit usually uses a separate transaction code from normal Screening deposits, so that it can be tracked individually.
- **Credit Optimizer Additional Rent:** This option is valid if your property uses Screening with Credit Optimizer in conjunction with Performance Analytics. Credit Optimizer must be enabled and the **Advanced Settings** should be configured in Screening setup to **Enable Additional Rent**. The Credit Optimizer additional rent is then enabled only on the **Decision** page when an application has passed with conditions, and occupancy requirements for Credit Optimizer have been met. In other words, this option is available to applicants who would not normally have passed the screen, but passed due to the Credit Optimizer settings. In this instance, the additional Credit Optimizer rent amount can be shown by selecting this column.
- **Do Not Allow Check Payment:** This is **Yes** if the property no longer accepts check payments from this household (the option is selected in the **Special/Collection Status** box). Otherwise, this is **No**.
- **Do Not Allow Lease Renewal:** This is **Yes** if the property no longer allows you to renew the household’s lease (the option is selected in the **Special/Collection Status** box). Otherwise, this is **No**.
- **Do Not Allow Money Order Payment:** This is **Yes** if the property no longer accepts money order payments from this household (the option is selected in the **Special/Collection Status** box). Otherwise, this is **No**.
- **Early Termination Fee:** This is the early termination fee on the household’s **Lease Details** page. N/A indicates the property does not charge an early termination fee.
- **Eviction Proceedings Started:** This is **Yes** if the property has started eviction proceedings against the household, as selected in the account’s **Special/Collection Status** box. Otherwise, this is **No**.
- **FAS Status:** This is **None** for current residents and **Pending** or **Complete** for former residents, depending on whether the account is closed. The report shows all of the statuses if you select **N/A** in the drop-down list on the report’s **Options** page.
- **Floor Plan:** This is the floor plan name.

- **Household ID/Resh ID:** This is the system-assigned household ID that displays on the person's **Lease Information** tab on the **Lease Details** tab on the **Account Profile** page.
- **Household Name:** This is the head of household name.
- **In Collection Status:** This is **Yes** if the property selected this option in the account's **Special/Collection Status** box. Otherwise, this is **No**.
- **Insufficient Notice Fee:** This is the insufficient notice fee amount that displays on the person's **Lease Information** tab on the **Lease Details** tab on the **Account Profile** page.
- **Late Method:** This is the late method assigned to this lease.
- **Lease Rent:** This is the total of all rent charges (CA types) in current scheduled billing in effect as of the report date.
- **Lease Rent Variance:** This is the lease rent variance. Calculated as:

  Next Lease Rent – Lease Rent

  This column is blank if there is no future renewal lease.
- **Lease Total:** This is the total of lease charges and credits. Calculated as:

  Lease Rent + Other Charges – Other Credits
- **Lease Total Variance:** This is the total lease variance. Calculated as:

  Next Lease Total – Lease Total

  If there is no future renewal lease, this column is blank.
- **Ledger Balance:** This is the total ledger balance for the household.
- **MTM Assessment Fee:** This amount is the month-to-month assessment fee if the lease expires with no renewal or N/A if the property charges no fee.
- **Next Lease Other Charges:** This is the total of all other charges (non-CA types) in future scheduled billing in effect as of the report date. If there is no future renewal lease, this column is blank.
- **Next Lease Other Credits:** This is the total of all other credits (non-CA types) in future scheduled billing in effect as of the report date. If there is no future renewal lease, this column is blank.
- **Next Lease Rent:** This is the total of all rent charges (CA types) in future scheduled billing in effect as of the report date. If there is no future renewal lease, this column is blank.
- **Next Lease Total:** If there is no future renewal lease, this column is blank. Otherwise, this is calculated as:

  Next Lease Rent + Next Lease Other Charges – Next Lease Other Credits
- **NSF Fee:** This is the fee amount charged for NSF checks. The amount is determined by the transaction code designated for NSF fees in Unified Platform Settings.
- **Num. of Occupants:** This is the number of occupants responsible for paying utilities in the unit.
- **Occupancy Status:** This is the person's occupancy status as of the report date:
  - *Applicant*

  - *Current Resident*
  - *Former Applicant* (Includes former applicants and canceled waitlist applicants)
  - *Former Resident*
  - *Pending Resident* (Includes residents on-notice to transfer)
  - *Waitlisted Applicant*

  If you entered a **Limit to as of date** at report submission, the report reflects the person's occupancy status as of this date. For example, assume a resident transfers to a new unit on 5/10 but keeps the old unit until 5/11. If you limit the report to 5/10, the resident will be listed as a "Current resident" in both the old and new unit. If the resident transfers out of the old unit on 5/11 and you limit the report to this date, the resident will be listed as a "Former resident" under the old unit and a "Current resident" under the new unit. If you don't limit the date (so that the report is truly "as of" the current property date), the resident is listed as a "Current resident" under the new unit only.

- **Other Charges:** This is the total of all other non-rent charges (non-CA types) in scheduled billing as of the report date for the current lease.
- **Other Charges Variance:** If there is no next lease, this column is blank. Otherwise, this is calculated as:

  Next Lease Other Charges – Other Charges
- **Other Credits:** This is the total of all other non-rent credits (non-CA types) in scheduled billing as of the report date for the current lease.
- **Other Credits Variance:** If there is no next lease, this column is blank. Otherwise, this is calculated as:

  Next Lease Other Credits – Other Credits
- **Payment Agreement/Exclude from Collections:** This is **Yes** or **No**, based on whether the **Payment Agreement/Exclude from Collections** status is enabled in the **Special/Collection Status** box of a former resident or applicant. Since you can select the setting only for formers, this is always **No** for a current household in the report.
- **Reason for Leasing:** This is the primary reason the resident chose to lease at the property.
- **Renewal End Date:** If the lease has been renewed, this is the end date of the renewal lease.
- **Renewal Start Date:** If the lease has been renewed, this is the start date of the renewal lease.
- **Required Notice:** This is the minimum number of days required for a household to provide a move-out notice.
- **Screening Additional Deposit:** This is the additional deposit amount entered when you approve a screening application with conditions. This option is displayed if your property uses Screening.
- **Transfer to Unit:** Residents on notice to transfer will be listed twice in the report, once as a current resident, and again as a pending resident. The status affects the values that appear in this column and the **Unit #** column.

  - As a current resident, the number of the unit in which the resident currently lives appears in the **Unit #** column; the number of the unit the resident is transferring to appears in this column.
  - As a pending resident, the transfer to unit number appears in the **Unit #** column, and this column is "N/A."
- **Unit ID:** This is the system-assigned unit ID.
- **Unit #:** This is the unit number associated with the lease. For residents on notice to transfer (pending residents), this is the "transfer to" unit.

Additional Unit Information

The following columns print unit information that displays on the **Change Rent Amounts by unit** page in unit setup.

- **Market + Addl.:** This is unit market rent plus additional charges. Calculated as:

  Base rent + Additional Charges and Credits + Unit Amenities
- **Market Rent:** This is the market rent. Calculated as:

  Base Rent + Unit Amenities
- **Other Unit Charges:** This is the total of all non-rent unit charges. (Non-rent is any charge with a non-CA type code).
- **Other Unit Credits:** This is the total of all unit credits.
- **Unit Rentable SQFT:** This is the unit rentable square footage.

Custom Fields

A column prints for each custom field that you selected for the report. The column heading is the field label and the field value is the information typed in the custom field on the household's "at a glance" page.

If you generated the report in the XML format, use the RealPage XML/CSV Decryption Utility to decrypt any field values that are encrypted. (In the **Custom fields** folder on the report parameters page, an encrypted field is identified with "(PII)," which indicates the field value contains personally identifiable information.) Refer to **Encryption, Custom Fields, and Reports** for more information.

Days Vacant Data Elements

The following columns print information for vacant units.

- **Days Since Previous Move Out:** This is the difference in days between the latest move-out date and the current lease move-in date.
- **Days Vacant and Off Market Before Move In:** This is the number of days vacant between the greater of the apply date or move-out date and the move-in date.

- **Max of Applied or Previous Move-Out Date:** This is the greater of the apply date or move-out date. For example, if a new resident applied for the unit on 7/1 and the move-out date on the unit is 7/7, this is 7/7.
- **Previous Move-Out Date:** This is the latest move-out date for the unit that is prior to the current lease move-in date.

  If there is no previous move-out date for the unit, this is blank, and the **Days Since Previous Move Out** *will also be blank.*

Final Account Statement

The following columns print information found on the **FAS** tab of the “at a glance” page. When reporting FAS fields, you should include the **Household Name** and **Unit Number** fields from the **Lease Detail** category.

- **FAS Balance:** This is the FAS balance.
- **FAS Date:** This is the date the account was closed.
- **FAS Forwarding Address:** This is the forwarding address entered at move-out or when the FAS was closed.
- **FAS Modify Date:** If the FAS was edited either through the undo or edit close account process, this is the date the FAS was modified.
- **FAS Notes:** These notes are generated by the system when a FAS is closed, modified, or reopened.
- **FAS Resident Notes:** These are any comments entered when the account was closed.
- **FAS Revision Reason:** This is the reason given when the FAS was edited either through the undo or edit close account process.
- **FAS Subjournal:** This is the subjournal name, if your property uses subjournals that require a final account statement.
- **FAS User:** This is the OneSite user that moved the household out or that last edited or closed the account.

General Demographics

The following column shows information for the head of household.

- **Age:** This is the head of household’s age.

  To filter the report to show only people who are at least a certain age, select the field, select **Edit Column/Report Properties**, and then enter a number in the **Age Greater Than or Equal To** field. Leave the field blank to include everyone, regardless of the age.

General Information

The following columns show information for the contact who is the head of household.

- **Cell Phone:** This is the head of household’s cell phone number.

- **Home Phone:** This is the head of household's home phone number.

  Opt In for Email Notifications: This field is available if your property has enabled **Email Notifications**. This column is Yes or No, based on whether the contact has opted in for email notifications (as selected on the contact's **General Information** tab).

  To filter the report to show only people who have or haven't opted in, select the field, select **Edit Column/Report Properties**, and then select "Yes" or "No." Leave "N/A" selected to include everyone.

- **Work Phone:** This is the head of household's work phone number.

Lease Summary

The following columns show information found on the person's **Lease Information** tab on the **Lease Details** tab on the **Account Profile** page. The values reported are as of the current property date.

- **Applied Date:** This is the lease application date.
- **Billing Address:** This is the billing address entered on the **Billing Information** tab of the head of household. The billing address can be the unit address or an alternate address.
- **Cancel/Deny Date:** For applicants, this is the date the lease application was canceled or denied.
- **Credit Approved By:** This is the OneSite user who approved the applicant's credit. For applicants, you can change this on the person's **Lease Information** tab on the **Lease Details** tab on the **Account Profile** page. For residents, you cannot change the information.
- **Credit Approved Date:** This is the date the credit was approved. For applicants, you can change this date on the person's **Lease Information** tab on the **Lease Details** tab on the **Account Profile** page. For residents, you cannot change the information.
- **Denial Reason:** This is the reason the lease application was denied, if applicable.
- **Deposit on Hand:** This is the unit deposit amount the person has paid.
- **Deposits Still Due:** This is the unit deposit amount still due.
- **Household Language:** This is the household's preferred language (if any). Your company must have chosen to display the preferred language and you must have selected a language for the household on the person's **Lease Information** tab on the **Lease Details** tab on the **Account Profile** page. Otherwise, this is blank.
- **Lease Approved By:** This is the OneSite user who approved the applicant's lease.
- **Lease Approved Date:** This is the date the lease was approved. For applicants, you can change this date on the person's **Lease Information** tab on the **Lease Details** tab on the **Account Profile** page. For residents, you cannot change the information.
- **Lease End Date:** This is the lease end date.
- **Lease Signed Date:** This is the date the lease was signed.
- **Lease Start Date:** This is the lease start date.

- **Lease Term:** This is the lease term selected on the person's **Lease Information** tab on the **Lease Details** tab on the **Account Profile** page..
- **Leasing Consultant:** This is the leasing consultant associated with the lease.
- **Move-Out Notice Type:** If skip/break handling is enabled on the **Skip/Break Handling** page in Unified Platform Settings, this indicates whether the person gave sufficient notice to move out, based on the most recent type selected when notice (or change notice) was given:
    - **Regular (notice):** The resident gave sufficient notice to vacate the unit.
    - **Skip:** The resident vacated the unit early without notice.
    - **Break:** The resident vacated the unit early, but legally (the lease allowed an early termination).

  If skip/break handling is inactive on the **Skip/Break Handling** page in Unified Platform Settings, all notices are considered regular notices and this is blank. However, if your property enabled skip/break handling and later deactivated the feature, any notices selected as regular, skip, or break are reported as such in the report.
- **Move-Out Reason:** This is the reason selected when notice was given.
- **Move-In Date:** This is the move-in date.
- **Moved-Out Date:** This is the date the resident moved out.
- **Notice Given Date:** This is the date notice was given.
- **Required Deposit:** This is the deposit amount assigned to the floor plan or unit in Unified Platform Settings or overridden on the lease application.
- **Scheduled Move-Out (Date):** This is the scheduled move-out date if notice has been given.
- **Times Late:** This is the number of times the person has paid late.
- **Times NSF:** This is the number of times the person's check payment has been returned for insufficient funds.

Lease Expiration Bar Graph Report

Unified Platform ≡ Navigation Menu > Reports > Manage Reports > Residents/Management (Report Area) > Lease Expiration Bar Graph

The *Lease Expiration Bar Graph* report shows your property's lease expiration control percentages and how these percentages compare with actual lease expirations during a given month and year. Use this report to manage lease expiration controls over a 24-month period.

When generating the report, you will select the starting month and year of the 24-month period and the report format. You can choose to generate the report as a bar graph, data table, or both.

For each month and period, the bar graph report graphs information on four colored bars:

- **Orange bar:** This bar shows the actual number of lease expirations during the period.
- **Black bar:** This bar shows the number of renewals in a given month and year. Compare this number with the number of expiring leases (orange bar) to see how well your property is renewing leases.
- **White bar:** This bar shows the number of leases with expiration dates in the given period, but the residents moved out before the lease expired.
- **Gray bar:** This bar shows the number of lease expirations allowed in a given month and year. Compare the orange and gray bars to determine whether your lease expiration controls need to be adjusted.

  For example, if your property has 500 units and allows 10% of its leases to expire in December 2012, the maximum number of lease expirations allowed in December then is 50, as shown on the gray bar. If 60 leases are due to expire during this period, as shown on the orange bar, your property has overridden lease expiration controls by 10 leases. That is, when a quote was generated, the selected lease term caused the lease to end during this period, and rather than changing the lease end date, a OneSite user with authority overrode the lease expiration control on the quote. Compare the orange and gray bars to determine whether your lease expirations controls are too high or too low, or to determine whether too many lease expiration controls have been overridden.

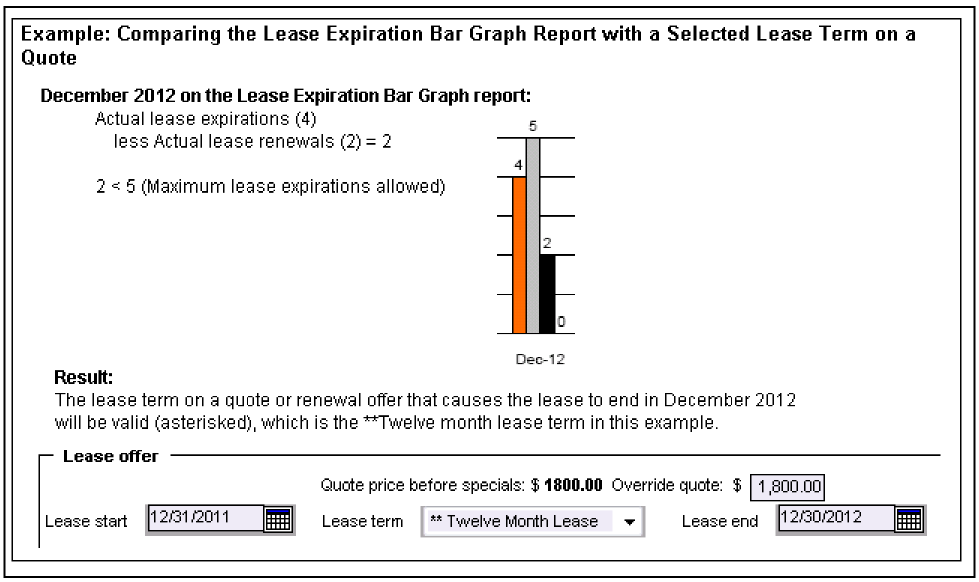
Comparing this Report with Lease Terms on Quotes and Renewal Offers

When you generate a quote or renew a lease and select a lease term, the system calculates the lease start/end dates for the new lease, and checks that the selected lease term falls within the acceptable expiration controls set up for the property. If the lease term is acceptable, the system flags it with asterisks (**) to indicate the new lease won't exceed expiration controls for that period. If the lease term has no asterisks, the lease term exceeds expiration controls for the month and year the lease ends. If you select it, you will receive a warning message.

Guidelines

To determine whether a lease term is acceptable when generating a quote or renewal offer based on this report, use the following guidelines:

- If actual lease expirations (orange bar) less actual renewals (black bar) is greater than or equal to maximum lease expirations allowed (gray bar) for a given month and year, the lease term that causes a new lease to end in that month and year should NOT be asterisked when generating a renewal offer or quote. A non-asterisked lease term means lease expirations have exceeded the maximum number allowed for that month and year, and you should select a different lease term that is acceptable (one that is flagged with asterisks **).
- If actual lease expirations (orange bar) less actual renewals (black bar) is less than maximum lease expirations allowed (gray bar) for a given month and year, a lease term that causes a new lease to end in that month and year should be flagged with asterisks (**) when generating a renewal offer or quote. An asterisked lease term means the selected lease term is acceptable, as it will not cause the property to exceed the maximum allowed for the month and year in which the lease ends.



Maximum Lease Expiration Allowed Calculation

The *Lease Expiration Bar Graph* report, a **Leasing & Rents – Management** report, compares actual lease expirations with lease expiration controls in a picture format, making it easy for you to determine how well your property is managing lease expirations. Actual lease expirations are shown with an orange bar, while maximum allowed lease expirations are shown with a gray bar.

To determine actual lease expirations, the system gets the total number of leases expiring within a particular month and year on the **Residents** page. To determine the maximum number of leases that can expire per month, based on lease expiration controls, the system calculates the number as follows:

Total units entered * Monthly lease expiration control %

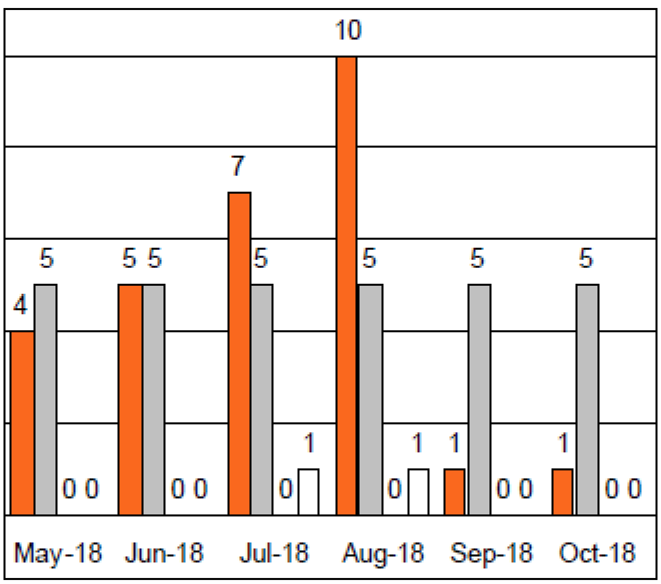
To view the total units entered amount, click **Settings**, **General information and property settings**, and then **General information**. In the example below, 51 units have been entered at the property:

Property identification

Total units on property	**60**
Total units entered	**51**
Gross square feet entered	**88400**
Rentable sq. ft. entered	**88400**

(Total units entered matches the total number of units entered in unit setup.)

In the *Lease Expiration Bar Graph* report sample below, the property has seven leases expiring in July 2018 (orange bar), but the allowed number of lease expirations was five (gray bar). This means the property exceeded its expiration controls during that month.



Example 1 – September 2015

Notice the orange bar for September 2015 is “5.” You can verify this number on the **Residents** page, which will list five leases that end during September 2015. This means actual lease expiration percentage is 10% (5 ÷ 50).

At **Lease expiration controls**, the monthly expiration for September 2015 is 5%. The total number of units entered for the property is 50. The maximum number of allowed lease expirations for September 2015 then is:

50 units * .05 = 2.5 = 3 leases

The report rounds the number up at .50 or higher.

The gray bar on the *Lease Expiration Bar Graph* for September 2015 is 3, in this example. When you compare the orange bar (5) with the gray bar (3), the property has exceeded the 5% expiration control for September.

Example 2 – April 2015

The orange bar for April 2015 is “2.” This means the **Residents** page has two leases with end dates that fall during April 2015, and the actual lease expiration percentage is 4% (4 ÷ 50).

At **Lease expiration controls**, the monthly expiration for April 2015 is 10.5%. The total number of units entered for the property is 50. The maximum number of allowed lease expirations for April 2015 then is:

50 units * .105 = 5.25 = 5 leases

The report rounds the number down at .49 or lower.

The gray bar on the *Lease Expiration Bar Graph* for April 2015 is 4, in this example. When you compare the orange bar (2) with the gray bar (5), the property is below the 10.5% expiration control for April.

Quotes and Renewal Offers

On quotes and renewal offers, you select a lease term, which determines the month and year the new or renewal lease ends. The system calculates an actual lease expiration percentage that includes the new or renewal lease, and compares it with the monthly allowed lease expiration percentage to determine if the property is within or has exceeded lease expiration controls.

The percentage of actual lease expirations is calculated as follows:

(Total number of resident leases expiring in the month and year the new or renewal lease ends + New or renewal lease)

÷ **Total units entered** at the property

Example

- Number of resident leases with end dates during September 2015: 5
- Total units entered: 50
- On a quote, you select a lease term that causes the lease to end during 09/2015. Actual lease expirations for September 2015 is:

  (5 + 1) ÷ 50 = 12%

The system compares the actual lease expiration percentage of 12% with the allowed lease expiration percentage of 10% defined at **Lease expiration controls**. Since actual expirations is greater than allowed expirations, the new lease will cause the property to further exceed lease expiration controls for September. Consequently, you will receive a warning message when you select the lease term on the quote or renewal offer. This alerts you to select a different lease term that allows the lease to end in a month and year that is within the property’s lease expiration controls; otherwise, you must override the control, if you have the right.

Summary

The bar graph format also has a *Lease term summary*, which totals the number of leases included on the report by lease term. The table format presents the same information as the bar graph, but the counts are not graphed. Also, it does not provide a lease term summary.

Lease Expirations and Reporting

OneSite provides several lease expiration reports that calculate lease expirations differently. The *Lease Expiration Bar Graph* report, for example, includes applicants in the total lease expiration count, and can also include waitlists based on lease expiration settings. A report parameter controls whether the *Lease Expiration Detail* report includes applicants (it never includes waitlists).

If you compare lease expirations on the following reports, note the parameters that affect the totals.

Report Name	**Report Parameters**		
	Include signed renewals?	**Include on-notice, pre-leased?**	**Include pending leases?**
Lease Expiration Detail	Controlled by report parameter.	Controlled by report parameter.	Controlled by report parameter. Counts applicant leases; excludes waitlists.
Lease Expiration Summary by Floor Plan	Controlled by report parameter.	Controlled by report parameter.	Controlled by report parameter. Counts applicant leases; excludes waitlists.
Current Renewal Status	Controlled by report parameter.	Controlled by report parameter.	Controlled by report parameter. Counts applicant leases; excludes waitlists.

Report Name	Report Parameters		
	Include signed renewals?	**Include on-notice, pre-leased?**	**Include pending leases?**
Lease Expiration Bar Graph	Automatically included. (No report parameter controls this.)	Automatically included. (No report parameter controls this.)	Automatically includes applicant leases. (No report parameter controls this.) Includes waitlists if the **Count waitlisted leases for expiration controls** setting is selected on the **Lease expiration** page in property setup.

Lease Expiration Bar Graph Options

Unified Platform ≡ Navigation Menu > Reports > Manage Reports > Residents/Management (Report Area) > Lease Expiration Bar Graph

The *Lease Expiration Bar Graph* report provides the following options used to select the information in the report and determine the report format.

Report Options

- **Generate Now:** To generate the report immediately, leave this option selected.
- **Schedule for Later:** To generate the report at a future date or time, select this option, and then perform the following:
  - Click the **Calendar** in the **Date** field, and then select the date you want to run the report.
  - Use the **Time** drop-down list to select the time when you want to generate the report. You can select any time of day in 30-minute increments.
- **Format:** Choose the report format. Available file types include:
  - **PDF:** To generate the report as a PDF file, select this option. Reports generated as PDF files appear on a new browser tab when completed.
  - **Word:** To generate the report as a DOC file, select this option. Reports generated in Word format automatically download when completed.
  - **Excel:** To generate the report as an XLS file, select this option. Reports generated as Excel files are downloaded to your device automatically when completed.
- **Select Property:** Use this drop-down list to select the properties. You can scroll through the list or type a few characters of the property name in the **Search** field to find and select

properties. Click the × **Clear** button in the **Search** field to type a new value. If you have access to only one property, the property is selected by default.

- **Send Email to External Recipient(s) upon Completion:** If you have the "External Report Distribution" right, you can type an email address in this field to send an email message to people outside of your organization. Use a semicolon to separate multiple email addresses. After the report is generated, an email message with a link to the report is sent.
- **Send Notification to Internal User(s) Upon Completion:** To send a notification to an internal user that the report is complete, use this drop-down list. You can select multiple users by selecting the check box beside each user you want to include.
- **Send File to Cloud Service upon Completion:** If you have the "External Report Distribution" right, you can use this drop-down list to select the cloud service account to which you want to send the report. After the report is generated, it is exported to the cloud service account's storage.

Parameters

- **Start Month/Year:** Use the drop-down list to select the starting month and year of the report. The total number of lease expirations and renewals in effect beginning with the selected month and year through the next 23 months are reported.
- **Report Format:** Use the drop-down list to select how the data is presented in the report. Select **Bar graph** (this format includes a lease term summary), **Data** (this format presents lease expirations in a table), or **Both**.
- **Include Details:** Activate this switch to indicate that you want detail lease information in the report.

Lease Expiration Bar Graph Columns

Unified Platform: ≡ Navigation Menu > Reports > Manage Reports > Last Run Date > View Report

Bar Graph Format

Lease end dates determine the calendar month in which a lease is counted.

- **X-axis:** The X-axis represents the number of leases.
- **Y-axis:** The Y-axis lists the 24 monthly periods, beginning with the month and year selected on the report's **Options** page.
- **Actual Lease Expirations:** This is the number of leases with expiration dates in the given month and year. This number includes:
  - Current leases (current residents whose leases will end this month),
  - Renewal leases (renewal leases that have not started yet that end this month)
  - On-notice, pre-leased leases (residents on-notice to transfer whose *new* leases end this month), *and*

- Pending leases (applicants whose leases end this month)

  The report will also count leases of waitlisted applicants if the **Count waitlisted leases for expiration controls** *setting is selected on the* **Lease expiration** *page in property setup.*

  This is the orange bar on the graph.

- **Maximum Lease Expirations Allowed:** This is the total number of lease expirations allowed in the calendar month. This is based on lease expiration controls in property setup. For example, if you allow 10% of your leases to expire in a particular month and year, and if you have 670 units at your property, this is 67 for this month and year in the report.

  This is the gray bar on the graph.

- **Actual Lease Renewals:** Of the total number of actual lease expirations shown on the orange bar, this is the number of renewal leases that expire this month.

  For month-to-month residents whose leases have expired, the renewal is counted in the month the original lease ended. Regardless of the date a month-to-month resident renewed or the renewal lease ends, the renewal is counted in the month and year the original lease expired.

  This is the black bar on the graph.

- **Moved Out Before Expiration:** This is the number of leases with expiration dates in this period where the residents moved out prior to the lease expiration date.

  This is the white bar on the graph.

Lease Term Summary

The summary is included with the bar graph format. If both the bar graph and data formats were included, this prints after the **Lease Expirations** data table. Information appears in the following columns left to right on the page:

- **Lease Term:** This is the lease term description.
- **# Leases:** This is the number of reported leases by lease term.
- **Total:** This row calculates the total number of leases in the report.

Lease Expirations Table

The data format presents the same information as the bar graph, except in a table. Additionally, it gives totals by floor plan. For each month and year and floor plan, the total number of lease expirations and lease renewals is calculated, as well as maximum lease expirations allowed during the period and the number of move-outs prior to lease expiration. Grand totals are calculated for the full 24-month period on the last row of the table.

- **Period:** This lists each month and year in the 24-month period, beginning with the report starting period.
- **Floor Plan:** This lists the floor plan code of each floor plan that has leases expiring or leases renewing during the given month and year.
- **Actual Lease Expirations:** This is the number of leases with expiration dates in the given month and year. This number includes active leases, future leases, and applicant leases. It can also include leases of waitlisted applicants if the **Count waitlisted leases for expiration controls** setting is selected on the **Lease expiration** page in property setup; otherwise, waitlisted leases are excluded in the count.
- **Maximum Lease Expirations Allowed:** This is the total number of lease expirations allowed in the calendar month.
- **Actual Lease Renewals:** Of the total number of actual lease expirations, this is the number of renewal leases that expire this month.

  For month-to-month residents whose leases have expired, the renewal is counted in the month and year the original lease expired.

- **Moved Out Before Expiration:** Of the total number of actual lease expirations, this is the number of former residents who moved out prior to the lease expiration date.

Detail

This section prints if you selected to include details on the report's **Options** page. A separate section prints for each month and year in the detail period. Up to three categories can print within each month/year section, depending on the activity in the period: actual lease expirations, move-outs before expiration, and actual lease renewals.

Actual Lease Expirations

- **Unit:** This is the unit number associated with a lease that ends during the given month and year. This is blank for units associated with waitlisted applicants.
- **Resident Name:** This is the head of household name.
- **Current Status:** This is the person's occupancy status, which can be any of the following:
  - **Applicant**
  - **Pending resident:** This is a renewed resident whose renewal lease has not started. The renewal lease ends during the given month and year. A renewal can be listed twice in the report, first as a current resident (with the current lease listed under the appropriate expiration month and year) and again as a pending resident. This depends on the lease end dates and the detail reporting period.
  - **Current resident**
- **Lease Begin Date:** This is the lease start date.
- **Lease End Date:** This is the lease end date, which falls within the given month and year.

- **Leasing Consultant:** This is the name of the leasing consultant who is associated with the lease, as shown on the **Summary** tab of the **Applicant** or **Resident at a glance** page.

  For renewals, this is the name of the leasing consultant who was selected during the **Renew now** process. If no leasing consultant or “House” was selected on the renewal offer or lease, this is “House.”
- **Market Rent:** This is the market rent for the unit as of the fiscal period in which the report is generated. Market rent is base rent plus the value of any premium amenities associated with the unit.
- **Lease Rent:** This is the total amount of rent charges and charges grouped to rent in scheduled billing in effect as of the property date for the lease that is expiring. Specifically, the amount is relative to the lease begin date or the current property date, depending on whether the lease begins in the future or began in the past. If manual edits were made to scheduled billing after the lease expiration date, this too affects the lease rent amount reported.
- **Difference (Renewals Only):** This is blank for all leases in this section.

Moved Out Before Lease Expiration

- **Unit:** This is the unit number associated with a lease that ends during the given month and year that was occupied by a resident who moved out early.
- **Resident Name:** This is the head of household name.
- **Current Status:** This is the person’s occupancy status, which is Former resident.
- **Lease Begin Date:** This is the lease start date.
- **Lease End Date:** This is the lease end date (not the move-out date), which falls within the given month and year.
- **Leasing Consultant:** This is the name of the leasing consultant who was associated with the lease at move-out. If no leasing consultant was assigned or the leasing consultant was “House,” this is blank.
- **Market Rent:** This is the market rent as of the fiscal period in which the report is generated. Market rent is base rent plus the value of any premium amenities associated with the unit.
- **Lease Rent:** This is the total amount of rent charges and charges grouped to rent in scheduled billing at move-out. Specifically, the amount is relative to the lease begin date or the current property date, depending on whether the lease begins in the future or began in the past. If manual edits were made to scheduled billing after the lease expiration date, this too affects the lease rent amount reported.
- **Difference (Renewals Only):** This is blank for all leases in this section.

Actual Lease Renewals

- **Unit:** This is the unit number for each renewal lease that ends during the given month and year.

- **Resident Name:** This is the head of household name.
- **Current Status:** This is the person’s occupancy status, which is Current resident.
- **Lease Begin Date:** This is the date the renewal lease begins.
- **Lease End Date:** This is the date the renewal lease ends.
- **Leasing Consultant:** This is the name of the leasing consultant who renewed the lease. If no leasing consultant was assigned or “House” was selected on the renewal lease, this is blank.
- **Market Rent:** This is the market rent as of the fiscal period in which the report is generated. Market rent is base rent plus the value of any premium amenities associated with the unit.
- **Lease Rent:** This is the total amount of rent charges and charges grouped to rent in scheduled billing in effect as of the property date for the renewal lease. Specifically, the amount is relative to the lease begin date or the current property date, depending on whether the lease begins in the future or began in the past. If manual edits were made to scheduled billing after the lease expiration date, this too affects the lease rent amount reported.
- **Difference (Renewals Only):** This is the difference between lease rent for the expiring lease (shown in the *Actual Lease Expirations* section) and lease rent for the renewal lease (shown in this section).

Lease Expiration Detail Report

Unified Platform ≡ Navigation Menu > Reports > Manage Reports > Residents/Management (Report Area) > Lease Expiration Detail

The *Lease Expiration Detail* report lists expired leases from previous months for residents currently leasing on a month-to-month basis, as well as those with leases scheduled to expire during the selected period. Use the report to analyze months with high potential exposure and how to market your property during this period.

Lease Expiration Detail Options

Unified Platform ≡ Navigation Menu > Reports > Manage Reports > Residents/Management (Report Area) > Lease Expiration Detail

The *Lease Expiration Detail* report provides the following options used to select the information in the report and determine the report format.

Report Options

- **Generate Now:** To generate the report immediately, leave this option selected.
- **Schedule for Later:** To generate the report at a future date or time, select this option, and then perform the following:
  - Click the **Calendar** in the **Date** field, and then select the date you want to run the report.
  - Use the **Time** drop-down list to select the time when you want to generate the report. You can select any time of day in 30-minute increments.
- **Format:** Choose the report format. Available file types include:
  - **PDF:** To generate the report as a PDF file, select this option. Reports generated as PDF files appear on a new browser tab when completed.
  - **Word:** To generate the report as a DOC file, select this option. Reports generated in Word format automatically download when completed.
  - **Excel:** To generate the report as an XLS file, select this option. Reports generated as Excel files are downloaded to your device automatically when completed.
- **Select Property:** Use this drop-down list to select the properties. You can scroll through the list or type a few characters of the property name in the **Search** field to find and select properties. Click the × **Clear** button in the **Search** field to type a new value. If you have access to only one property, the property is selected by default.
- **Send Email to External Recipient(s) upon Completion:** If you have the “External Report Distribution” right, you can type an email address in this field to send an email message to people outside of your organization. Use a semicolon to separate multiple email addresses. After the report is generated, an email message with a link to the report is sent.

- **Send Notification to Internal User(s) Upon Completion:** To send a notification to an internal user that the report is complete, use this drop-down list. You can select multiple users by selecting the check box beside each user you want to include.
- **Send File to Cloud Service upon Completion:** If you have the "External Report Distribution" right, you can use this drop-down list to select the cloud service account to which you want to send the report. After the report is generated, it is exported to the cloud service account's storage.

Parameters

- **Month/Year By:** Use the drop-down list to select the method for selecting the months you want to report. You can choose from **Specific Month/Year** and **Range Month/Year**.
  - **Specific Month/Year:** Use the drop-down list to select the month and year you want to report. This option appears if you select **Specific Month/Year**.
  - **Month/Year From:** Use the drop-down list to select the starting month and year for the range you want to report. This option appears if you select **Range Month/Year**.
  - **Month/Year To:** Use the drop-down list to select the ending month and year for the range you want to report. This option appears if you select **Range Month/Year**.
- **Show Unit Rent As:** Use the drop-down list to select the type of rent you want to report. You can choose from **Market Rent** and **Market + Addl.**.
- **Include Signed Renewals:** Activate this switch to include future renewal leases that start during the selected period or month range in the report.
- **Include On Notice Pre-leased:** Activate this switch to include on-notice and pre-leased units in the report.
- **Include Pending Leases:** Activate this switch to include applicants (pending residents) and pending transfers in the report.
- **Sort the Report By:** Use the drop-down list to select whether the report sorts leases by expiration date (default choice) or by unit number.

Lease Expiration Detail Columns

Unified Platform: ≡ Navigation Menu > Reports > Manage Reports > Last Run Date > View Report

The *Lease Expiration Detail* report is divided into month/year sections that show the number of expiring leases, market rent, lease rent, and other charges during the period.

- **Bldg/Unit:** This is the building (if applicable) and unit number.
- **Floor Plan:** This is the floor plan code.
- **SQFT:** This is the rentable square footage for the unit. Units inherit rentable square footage from the floor plan, but you can change this on a unit-by-unit basis.
- **Name/Phone/Email:** This is the contact information for the head of household.

- **Term:** This is the current lease term or the month-to-month (MTM) lease status.
- **Lease End:** This is the lease expiration date.
- **Move-In:** This is the move-in date.
- **Expected Move-Out:** This is the notice to vacate date (if any).
- **Do Not Renew:** If an **X** appears, then the property does not allow lease renewals for this lease.
- **Late/NSF:** This is the number of times the resident paid late and/or paid with insufficient funds.
- **Last Rent Change:** This is the date that the scheduled billing rent was last changed.
- **Last Rent Change Amt:** This is the last rent change for the resident (the incremental rent increase or decrease).
- **(Rent):** The column name is the rent type selected in the **Show Unit Rent As** option at report generation:
    - **Market Rent:** This is base rent plus amenity rent. Base rent is the total of CA-type transactions scheduled for the floor plan and unit. Amenity rent is the total of unit-priced amenities assigned to the unit.
    - **Market +Addl:** This is market rent plus the total of non-CA type transactions scheduled for the floor plan or unit, and the transactions are not grouped in the effective rent transaction code group.

      For month-to-month leases, this is the market rent in effect on the property date. For expiring leases, this is the market rent in effect on the lease end date.
- **Lease Rent:** This is the sum of all CA-type charges in scheduled billing, plus any grouped to rent effective on the property date (for month-to-month leases) or the lease end date (for expiring leases).
- **Other Charges:** This is the sum of non-rent charges in scheduled billing effective on the property date (for month-to-month leases) or the lease end date (for expiring leases).
- **Other Credits:** This is the sum of non-rent credits in scheduled billing effective on the property date (for month-to-month leases) or the lease end date (for expiring leases).
- **Total Billing:** This is total scheduled billing for the lease. Calculated as:

  Lease Rent + Other Charges + Other Credits
- **Balance:** This is the resident's current ledger balance.
- **Total MTM/Expired Leases:** This row prints for each reported month/year section and shows the total number of leases expiring during the month, total market rent, lease rent, other charges, other credits, and total scheduled billings during the month.
- **Total Leases:** This is the last row of the report and shows the total number of leases reported, total market rent, lease rent, other charges, other credits, and scheduling billings for all leases.

Lease Expiration Renewal Detail (Excel) Report

Unified Platform ≡ Navigation Menu > Reports > Manage Reports > Residents/Management (Report Area) > Lease Expiration Renewal Detail (Excel)

The *Lease Expiration Renewal Detail – Excel* report shows information for residents whose leases are due to expire during the selected period. The report can include residents who have renewed or have leased month-to-month.

The report has six sheets. The first sheet contains the report title and parameters. The remaining sheets contain the report information:

- **Lease Expiration Detail** (on page 79)
- **Lease Renewal Detail** (on page 79)
- **Renewal Summary by Floor Plan** (on page 80)
- **Future Expirations by Floor Plan** (on page 80)
- **New or Renewal Summary by Leasing Consultant** (on page 81)

Use the report to analyze lease renewals at your property.

Lease Expiration Renewal Detail (Excel) Options

Unified Platform ≡ Navigation Menu > Reports > Manage Reports > Residents/Management (Report Area) > Lease Expiration Renewal Detail (Excel)

The *Lease Expiration Renewal Detail (Excel)* report provides the following options used to select the information in the report and determine the report format.

Report Options

- **Generate Now:** To generate the report immediately, leave this option selected.
- **Schedule for Later:** To generate the report at a future date or time, select this option, and then perform the following:
  - Click the **Calendar** in the **Date** field, and then select the date you want to run the report.
  - Use the **Time** drop-down list to select the time when you want to generate the report. You can select any time of day in 30-minute increments.
- **Format:** Choose the report format. Available file types include:
  - **Standard XML:** To generate the report as an XML file, select this option. See **Viewing Completed Reports or Extracts** for information on viewing an XML report.
  - **Excel:** To generate the report as an XLS file, select this option. Reports generated as Excel files are downloaded to your device automatically when completed.
- **Select Property:** Use this drop-down list to select the properties. You can scroll through the list or type a few characters of the property name in the **Search** field to find and select

properties. Click the × **Clear** button in the **Search** field to type a new value. If you have access to only one property, the property is selected by default.

- **Send Email to External Recipient(s) upon Completion:** If you have the "External Report Distribution" right, you can type an email address in this field to send an email message to people outside of your organization. Use a semicolon to separate multiple email addresses. After the report is generated, an email message with a link to the report is sent.
- **Send Notification to Internal User(s) Upon Completion:** To send a notification to an internal user that the report is complete, use this drop-down list. You can select multiple users by selecting the check box beside each user you want to include.
- **Send File to Cloud Service upon Completion:** If you have the "External Report Distribution" right, you can use this drop-down list to select the cloud service account to which you want to send the report. After the report is generated, it is exported to the cloud service account's storage.

Parameters

- **Lease Expiration Start Date:** Use the **Calendar** to select the start date for the date range.
- **Lease Expiration End Date:** Use the **Calendar** to select the end date for the date range.
- **Subproperty:** Use the drop-down list to select the subproperty number if you use subproperty accounting and want to report only the transactions posted to that property. OneSite lists the subproperty number associated with the unit and transaction code on the transaction post date. Select **All Subproperties** to report all transaction activity for the property.
- **Display Renewal Leases During Report Period:** Activate this switch to include renewed leases in the report. The report includes leases with end dates in the lease expiration date range and the lease status is *Renewed*.
- **Display Month-to-Month Only:** Activate this switch to restrict the report to month-to-month leases only. The report includes only expired leases with end dates in the lease expiration date range. A lease is expired if its end date is before the property date.
- **Sort by:** Use the drop-down list to select whether to sort the leases by unit number or resident name in the report.

Lease Expiration Renewal Detail (Excel) Columns

Unified Platform: ≡ Navigation Menu > Reports > Manage Reports > Last Run Date > View Report

The report title and parameters appear on sheet 1 along with links to the report information:

- **Lease Expiration Detail** (on page 79)
- **Lease Renewal Detail** (on page 79)
- **Renewal Summary by Floor Plan** (on page 80)
- **Future Expirations by Floor Plan** (on page 80)

- **New or Renewal Summary by Leasing Consultant** (on page 81)

Lease Expiration Detail (Sheet 2)

This report shows lease expiration details for residents whose leases are expiring during the reporting period.

- **Bldg/Unit:** This is the building and unit number for the head of household.
- **Floor Plan:** This is the floor plan.
- **Name:** This is the head of household name.
- **Actual Rent:** This is the current lease rent. The report totals this column.
- **Other Billings:** This is the total of non-CA billings. The report totals this column.
- **Last Increase:** This is the date the resident's rent was last increased or N/A.
- **Last Increase Amount:** This is the amount of the resident's last rent increase or 0.00. The report totals this column.
- **Market Rent:** This is current market rent for this unit. Market rent is base rent plus unit premium amenities. The report totals this column.
- **Move-In Date:** This is the move-in date.
- **Lease End Date:** This is the lease end date.
- **Decision:** This is the lease status, which is *Vacating*, *MTM*, or *Unknown*. *Unknown* is current and pending renewal leases.
- **New Lease Start Date:** This is the renewal lease start date or blank.
- **New Lease Term:** This is the renewal lease term in number of months or blank.
- **New Rent:** This is the offer price or 0.00. The report totals this column.
- **New Other Billings:** This is the total of additional billings on the renewal offer or 0.00. The report totals this column.
- **Leasing Consultant:** This is the name of the leasing consultant on the current lease or renewal offer.
- **(Totals):** This row shows the columnar totals.

Lease Renewal Detail (Sheet 3)

This report shows lease renewal details for the residents whose leases were renewed during the reporting period if you enabled the **Show renewed leases during report period** option at report generation. Otherwise, this section is blank.

- **Bldg/Unit:** This is the building and unit number for the head of household.
- **Floor Plan:** This is the floor plan.
- **Name:** This is the head of household name.
- **Actual Rent:** This is the current lease rent for the household. The report totals this column.
- **Other Billings:** This is the total of non-CA billings. The report totals this column.
- **Last Increase:** This is date of the last rent increase or N/A.

- **Last Increase Amount:** This is the last rent increase amount or 0.00. Parentheses indicate a decrease. The report totals this column.
- **Market Rent:** This is the unit market rent. The report totals this column.
- **Move-In Date:** This is the move-in date.
- **Lease End Date:** This is the lease end date.
- **Decision:** The status is *Renewed*.
- **New Lease Start Date:** This is the renewal lease start date.
- **New Lease Term:** This is the renewal lease term in number of months.
- **New Rent:** This is the renewal rent price. Calculated as:

  Actual Rent + Last Increase Amount
- **New Other Billings:** This is the total of non-CA scheduled billings on the renewal lease or 0.00. The report totals this column.
- **Leasing Consultant:** This is the name of the leasing consultant on the renewal lease.
- **(Totals):** This row shows the column totals.

Renewal Summary by Floor Plan (Sheet 4)

This report summarizes lease renewals by floor plan for the reporting period.

- **Floor Plan:** This is the floor plan code.
- **Total Possible:** This is the total number of leases in this floor plan that are expiring during the report period on sheet 2. If the report also shows renewed leases on sheet 3, then this total includes them.
- **Renewed:** This is the total number of leases in this floor plan with a Renewed decision on sheet 3.
- **Vacating:** This is the total number of leases in this floor plan with a Vacating decision on sheet 2.
- **Unknown:** This is the total number of leases in this floor plan with an Unknown decision on sheet 2.
- **Month-to-Month:** This is the total number of leases in this floor plan with an MTM decision on sheet 2.
- **Avg Term Renewed Leases:** This is the average lease term for the renewed leases in this floor plan.
- **Avg New Rent:** This is the average rent for the renewed leases in this floor plan.
- **Avg Market Rent:** This is the average market rent for the renewed leases in this floor plan.

Future Expirations by Floor Plan (Sheet 5)

This report prints future expirations summarized by floor plan.

- **Floor Plan:** This is the floor plan code.

- **0–30 Days:** This is the total number of leases expiring in the next 30 days as of the system date.
- **31–60 Days:** This is the total number of leases expiring in the next 31–60 days as of the system date.
- **61–90 Days:** This is the total number of leases expiring in the next 61–90 days as of the system date.
- **91+ Days:** This is the total number of leases expiring in 91 or more days as of the system date.

New or Renewal Summary by Leasing Consultant (Sheet 6)

This report shows new and renewal summary information by leasing consultant.

- **Leasing Consultant:** This is the name of the leasing consultant on the lease.
- **Captured from Month-to-Month:** This is the number of month-to-month leases associated with this leasing consultant.
- **Captured from Leases Expiring this Month (Report Month Name):** This is the number of expiring leases associated with this leasing consultant.
- **Captured from Leases Expiring in the Future:** This is the number of leases expiring in the future that are associated with this leasing consultant.

Lease Expiration Summary by Floor Plan Report

Unified Platform ≡ Navigation Menu > Reports > Manage Reports > Residents/Management (Report Area) > Lease Expiration Summary by Floor Plan

The *Lease Expiration Summary by Floor Plan* report includes all leases that will expire during the next 12 months. Use this report to audit lease expirations by floor plan.

Lease Expiration Summary by Floor Plan Options

Unified Platform ≡ Navigation Menu > Reports > Manage Reports > Residents/Management (Report Area) > Lease Expiration Summary by Floor Plan

The *Lease Expiration Summary by Floor Plan* report provides the following options used to select the information in the report and determine the report format.

Report Options

- **Generate Now:** To generate the report immediately, leave this option selected.
- **Schedule for Later:** To generate the report at a future date or time, select this option, and then perform the following:
  - Click the **Calendar** in the **Date** field, and then select the date you want to run the report.
  - Use the **Time** drop-down list to select the time when you want to generate the report. You can select any time of day in 30-minute increments.
- **Format:** Choose the report format. Available file types include:
  - **PDF:** To generate the report as a PDF file, select this option. Reports generated as PDF files appear on a new browser tab when completed.
  - **Word:** To generate the report as a DOC file, select this option. Reports generated in Word format automatically download when completed.
  - **Excel:** To generate the report as an XLS file, select this option. Reports generated as Excel files are downloaded to your device automatically when completed.
- **Select Property:** Use this drop-down list to select the properties. You can scroll through the list or type a few characters of the property name in the **Search** field to find and select properties. Click the ✕ **Clear** button in the **Search** field to type a new value. If you have access to only one property, the property is selected by default.
- **Send Email to External Recipient(s) upon Completion:** If you have the “External Report Distribution” right, you can type an email address in this field to send an email message to people outside of your organization. Use a semicolon to separate multiple email addresses. After the report is generated, an email message with a link to the report is sent.

- **Send Notification to Internal User(s) Upon Completion:** To send a notification to an internal user that the report is complete, use this drop-down list. You can select multiple users by selecting the check box beside each user you want to include.
- **Send File to Cloud Service upon Completion:** If you have the “External Report Distribution” right, you can use this drop-down list to select the cloud service account to which you want to send the report. After the report is generated, it is exported to the cloud service account’s storage.

Parameters

- **Include Signed Renewals:** Activate this switch to include residents who have signed lease renewals in the report.
- **Include On Notice Pre-Leased Units:** Activate this switch to include residents who have given notice but the unit they live in is pre-leased.
- **Include Pending Leases:** Activate this switch to include leases for residents who have a **Pending Renewal** status (these are residents whose leases end within the next 30 days of the current property date.)

Lease Expiration Summary by Floor Plan Columns

Unified Platform: ≡ Navigation Menu > Reports > Manage Reports > Last Run Date > View Report

The company and property names are at the top of the report followed by the property date. The report parameters also display. Each of the columns in the report is described below.

- **Floorplan Group**: This is the floor plan group this floor plan is assigned to in property setup. The floor plan group identifies common characteristics that floor plans share. For example, the “2/2” floor plan group is any floor plan in the property with two bedrooms and two baths.
- **Floorplan:** This is the floor plan code.
- **Total Leases:** This is the total number of leases that will expire during the 12 months that are reported for this floor plan. (The number includes MTM leases.)
- **MTM:** This is the number of month-to-month leases for this floor plan.
- **(12-Month Listing):** This is the number of leases expiring in this floor plan for the next 12 months.
- **Later:** This is the number of leases expiring at a later date beyond the last month reported for this floor plan.
- **Totals for (floor plan group name):** This row prints below the last floor plan in the group. It shows the total number of expiring leases by floor plan group and month.
- **Report Totals:** This is the last row of the report. Each column is totaled to show total leases that will expire for the property by month.

Lease Renewal Trend Report

Unified Platform ≡ Navigation Menu > Reports > Manage Reports > Residents/Management (Report Area) > Lease Renewal Trend

The *Lease Renewal Trend* report shows renewal statistics for the selected period. It shows the number of leases expiring and renewed, and it calculates the renewal percentage. Use this report to determine how well your property is renewing leases.

On the report's **Options** page, you can run the report by month or year, based on whether you want to view monthly or annual statistics. If you run the report by month, you will select the starting month and year. If you run the report by year, you will select the starting year. The report will show statistics as of the starting month and/or year through the current system date month and/or year.

This report shows statistics only. To determine the residents who have leases expiring or residents who renewed during the period, generate the *Lease Expiration Bar Graph* report for the same period.

Lease Renewal Trend Options

Unified Platform ≡ Navigation Menu > Reports > Manage Reports > Residents/Management (Report Area) > Lease Renewal Trend

The *Lease Renewal Trend* report provides the following options used to select the information in the report and determine the report format.

Report Options

- **Generate Now:** To generate the report immediately, leave this option selected.
- **Schedule for Later:** To generate the report at a future date or time, select this option, and then perform the following:
  - Click the **Calendar** in the **Date** field, and then select the date you want to run the report.
  - Use the **Time** drop-down list to select the time when you want to generate the report. You can select any time of day in 30-minute increments.
- **Format:** Choose the report format. Available file types include:
  - **Standard XML:** To generate the report as an XML file, select this option. See **Viewing Completed Reports or Extracts** for information on viewing an XML report.
  - **HTML:** To generate and view the report in HTML, select this option. See Viewing Completed Reports or Extracts for information on viewing an HTML report.
  - **Excel:** To generate the report as an XLS file, select this option. Reports generated as Excel files are downloaded to your device automatically when completed.

  - **CSV:** To generate the report as a CSV file, select this option. Reports generated as a CSV file automatically download when completed.
- **Select Property:** Use this drop-down list to select the properties. You can scroll through the list or type a few characters of the property name in the **Search** field to find and select properties. Click the × **Clear** button in the **Search** field to type a new value. If you have access to only one property, the property is selected by default.
- **Send Email to External Recipient(s) upon Completion:** If you have the "External Report Distribution" right, you can type an email address in this field to send an email message to people outside of your organization. Use a semicolon to separate multiple email addresses. After the report is generated, an email message with a link to the report is sent.
- **Send Notification to Internal User(s) Upon Completion:** To send a notification to an internal user that the report is complete, use this drop-down list. You can select multiple users by selecting the check box beside each user you want to include.
- **Send File to Cloud Service upon Completion:** If you have the "External Report Distribution" right, you can use this drop-down list to select the cloud service account to which you want to send the report. After the report is generated, it is exported to the cloud service account's storage.

Parameters

- **Time Frame:** Use the drop-down list to select whether the report shows monthly or yearly statistics. To view statistics for expiring and renewed leases by month and year, select "Monthly." To view annual statistics, select "Yearly."
- **Start Month:** If the time frame is "Monthly," use the drop-down list to select the starting month. You can select any calendar month.
- **Start Year:** Use the drop-down list to select the starting year. You can select any year that is eight years prior to the current system date year or less. For example, if the system date is March 2022, the report date can be any date that is January 2014–March 2022. If the time frame is "Yearly," the starting year can be any year that is eight years prior to the system date year or less. For example, if the system date year is 2022, years 2014–2022 are available for selection.

Lease Renewal Trend Columns

Unified Platform: ≡ Navigation Menu > Reports > Manage Reports > Last Run Date > View Report

The company and property names are listed at the top of the report, followed by the report title and the system date. The following information is printed in columns from left to right on the page.

By Month Version

- **(Month and Year):** This is the starting month and year selected on the report parameters page, followed by each subsequent month and year through the current system date month and year.
- **Leases Expiring:** This is the number of leases with lease end dates that fall within the given month and year.
- **Leases Renewed:** Of the number of expiring leases, this is the number of renewals. A renewal is counted in the month and year the lease expires, regardless of when the **Renew now** process was completed.
- **Renewed %:** This is the renewal percentage for the given month and year. For example, if 80 out of 100 expiring leases were renewed, this is 80%:

  (Leases Renewed ÷ Leases Expiring) * 100

  The system rounds the calculated percentage up at .50. For example, 96.50 is 97% and 96.49 is 96%.

- **Total:** This row totals expiring leases and renewed leases, and calculates the total renewal percentage for all months and years.

  (Total Leases Renewed ÷ Total Leases Expiring) * 100

By Year Version

- **(Year):** This is the starting year selected on the report parameters page, followed by each subsequent year through the current system date year.
- **Leases Expiring:** This is the number of leases with lease end dates that fall within the given year.
- **Leases Renewed:** Of the number of expiring leases, this is the number of leases that were renewed during the specified year.
- **Renewed %:** This is the renewal percentage for the given year. For example, if 80 out of 100 expiring leases were renewed, this is 80%.

  (Leases Renewed ÷ Leases Expiring) * 100

  The system rounds the calculated percentage up at .50. For example, 57.50 is 58% and 57.49 is 57%.

- **Total:** This row totals expiring leases and renewed leases, and calculates the total renewal percentage for all years.

  (Total Leases Renewed ÷ Total Leases Expiring) * 100

Lease Variance by Move In Date Report

Unified Platform ≡ Navigation Menu > Reports > Manage Reports > Residents/Management (Report Area) > Lease Variance by Move In Date

The *Lease Variance by Move In Date* report is a snapshot of your property's leases for all current residents as of the current property date. Current residents include pending renewals, pending transfers, and pending move-outs. Use this report to compare lease rent with the current fiscal period market rent for each current resident.

The report groups leases into four sections. The first grouping includes leases with move-in dates that are three or more years prior to the calendar year. The second grouping lists leases with move-in dates that are two years prior to the calendar year. The third grouping lists leases with move-in dates that are one year prior to the calendar year. Leases with move-in dates in the current calendar year are included in the last group.

For example, if the current system date is July 1, 2017, current leases with move-in dates during year 2014 and prior are listed in the first section. Sections two, three, and four include current leases with move-in dates for years 2015, 2016, and 2017, respectively.

For each household, the report lists the floor plan, unit number, head of household name, lease dates, and rent information. The report gives the prior rent amount (the last rent change from scheduled billing), current lease rent, and the current fiscal period market rent. The calculated variance is the difference between market and lease rent.

Lease Variance by Move In Date Options

Unified Platform ≡ Navigation Menu > Reports > Manage Reports > Residents/Management (Report Area) > Lease Variance by Move In Date

The *Lease Variance by Move In Date* report provides the following options used to select the information in the report and determine the report format.

Report Options

- **Generate Now:** To generate the report immediately, leave this option selected.
- **Schedule for Later:** To generate the report at a future date or time, select this option, and then perform the following:
  - Click the **Calendar** in the **Date** field, and then select the date you want to run the report.
  - Use the **Time** drop-down list to select the time when you want to generate the report. You can select any time of day in 30-minute increments.
- **Format:** Choose the report format. Available file types include:

    - **Standard XML:** To generate the report as an XML file, select this option. See **Viewing Completed Reports or Extracts** for information on viewing an XML report.
    - **HTML Report:** To generate and view the report in HTML, select this option. See Viewing Completed Reports or Extracts for information on viewing an HTML report.
    - **Excel Export:** To generate the report as an XLS file, select this option. Reports generated in Excel format automatically download when completed.
    - **CSV Export:** To generate the report as a CSV file, select this option. Reports generated in CSV format automatically download when completed.
- **Select Property:** Use this drop-down list to select the properties. You can scroll through the list or type a few characters of the property name in the **Search** field to find and select properties. Click the ✕ **Clear** button in the **Search** field to type a new value. If you have access to only one property, the property is selected by default.
- **Send Email to External Recipient(s) upon Completion:** If you have the "External Report Distribution" right, you can type an email address in this field to send an email message to people outside of your organization. Use a semicolon to separate multiple email addresses. After the report is generated, an email message with a link to the report is sent.
- **Send Notification to Internal User(s) Upon Completion:** To send a notification to an internal user that the report is complete, use this drop-down list. You can select multiple users by selecting the check box beside each user you want to include.
- **Send File to Cloud Service upon Completion:** If you have the "External Report Distribution" right, you can use this drop-down list to select the cloud service account to which you want to send the report. After the report is generated, it is exported to the cloud service account's storage.

Lease Variance by Move In Date Columns

Unified Platform: ≡ Navigation Menu > Reports > Manage Reports > Last Run Date > View Report

For each household listed, the following information is printed in columns from left to right on the page.

- **Floor Plan:** This is the floor plan code.
- **Bldg/Unit:** This is the building and number of the unit in which the household resides.

  If your property doesn't use buildings, the column title is Unit.

- **Name:** This is the head of household name.
- **Move-In:** This is the move-in date associated with the current lease.
    - For transfers, this is the move-in date into the current unit. If there is a transfer in-process where the resident is keeping both units, the report lists the old and new lease in the appropriate group, based on the lease move-in dates.

- **Lease End:** This is the lease end date associated with the current lease.
- **Days Expired:** If the lease has not expired—the lease end date is on or after the current property date—this is “Current.” If the lease has expired, this is the number of days since the lease expired (beginning with the day after expiration) through the current property date.
- **Prior Rent:** This is lease rent (the sum of all CA-type transactions in scheduled billing, plus any transaction grouped to rent) as of the last change made in scheduled billing. If no change has occurred, this is the same amount reported in the **Lease Rent** column.
- **Market Rent:** This is the fiscal period market rent for the unit, which is based on the A/R setting that controls whether OneSite calculates market rent on the first of the month or at the end of the month. That is, the **Calculate vacancy based on 1st of month billing** option controls how market rent is reported for the unit.
- **Lease Rent:** This is the current amount of rent received for this unit for this lease. This is the sum of all CA-type transactions in scheduled billing (plus any transaction grouped to rent) in effect as of the date the report was generated.
- **As Of:** This is the date the current lease rent transaction became effective. This date is taken from scheduled billing.
- **Variance:** This is the difference between **Market Rent** and **Lease Rent**.
- **(Totals):** For each group of leases, the report totals the number of move-ins, each of the rent columns (**Prior**, **Market**, and **Lease Rent**), and the variance.
- **Avg Var:** This amount prints below the totals row. It is the average variance for a given group of current leases: Total Variance ÷ Number of move-ins

Mailing Labels Report

Unified Platform ≡ Navigation Menu > Reports > Manage Reports > Residents/Management (Report Area) > Mailing Labels

Use the *Mailing Labels* report to print mailing labels for your residents. This is a two-column report that is formatted for Avery 5161 or any 4″ x 1″ mailing labels. You can print labels for current, pending (transfer), or former residents, and for waitlisted applicants and prospects. You can also print labels only for the heads of households, and for residents based on their account status (prepaid, delinquent, or zero balance). Up to 20 addresses print per page.

Mailing Labels Options

Unified Platform ≡ Navigation Menu > Reports > Manage Reports > Residents/Management (Report Area) > Mailing Labels

The *Mailing Labels* report provides the following options used to select the information in the report and determine the report format.

Report Options

- **Generate Now:** To generate the report immediately, leave this option selected.
- **Schedule for Later:** To generate the report at a future date or time, select this option, and then perform the following:
  - Click the **Calendar** in the **Date** field, and then select the date you want to run the report.
  - Use the **Time** drop-down list to select the time when you want to generate the report. You can select any time of day in 30-minute increments.
- **Format:** Choose the report format. Available file types include:
  - **PDF:** To generate the report as a PDF file, select this option. Reports generated as PDF files appear on a new browser tab when completed.
  - **Word:** To generate the report as a DOC file, select this option. Reports generated in Word format automatically download when completed.
  - **Excel:** To generate the report as an XLS file, select this option. Reports generated as Excel files are downloaded to your device automatically when completed.
- **Select Property:** Use this drop-down list to select the properties. You can scroll through the list or type a few characters of the property name in the **Search** field to find and select properties. Click the ✕ **Clear** button in the **Search** field to type a new value. If you have access to only one property, the property is selected by default.
- **Send Email to External Recipient(s) upon Completion:** If you have the "External Report Distribution" right, you can type an email address in this field to send an email message to

people outside of your organization. Use a semicolon to separate multiple email addresses. After the report is generated, an email message with a link to the report is sent.

- **Send Notification to Internal User(s) Upon Completion:** To send a notification to an internal user that the report is complete, use this drop-down list. You can select multiple users by selecting the check box beside each user you want to include.
- **Send File to Cloud Service upon Completion:** If you have the "External Report Distribution" right, you can use this drop-down list to select the cloud service account to which you want to send the report. After the report is generated, it is exported to the cloud service account's storage.

Parameters

- **Account Status:** Use the drop-down list to select the group of residents whom you want to print mailing labels for:
  - **All:** Select this option to print mailing labels for all residents (current, former, and pending).
  - **Current Residents:** Select this option to print mailing labels only for people that currently live at your property. Current residents can include residents who have given notice to transfer or move-out or only residents who are on-notice; this is controlled by the **On-notice accounts only** option below.
  - **Former Residents:** Select this option to print mailing labels for former residents who have moved out.
  - **Pending Residents:** Select this option to print mailing labels for applicants. This does not include waitlisted applicants or people whose applications were canceled or denied.
  - **Prospects:** Select this option to print mailing labels for prospects only.
  - **Waitlist Applicants:** Select this option to print mailing labels for waitlisted applicants only, select this option.
- **Include Head of household Only:** Activate this switch to generate labels for the head of household only. Otherwise, the report prints labels for each person in the household.
- **Ledger Account Status:** Use the drop-down list to select the account status to include in the report.
  - **All:** Select this option to include all residents, regardless of their account status.
  - **Delinquent:** Select this option to include only those residents with a delinquent ledger balance.
  - **Prepaid:** Select this option to include only those residents with a prepaid ledger balance.
  - **Zero:** Select this option to include only those residents with a zero ledger balance.
- **Include Unit Number in Address:** Activate this switch to print the unit number on the label. This option controls whether the unit number prints on line 2 of the address.

- **Include Unit Number at the Top of Label:** Activate this switch to print the resident's unit number above the address.

  If you activate this option and the previous option, the unit number will appear twice: above the person's name and on the address line.

- **Sort By:** Use the drop-down list to sort the report by unit number or resident name.

Mailing Labels Columns

Unified Platform: ≡ Navigation Menu > Reports > Manage Reports > Last Run Date > View Report

Resident addresses print in two columns. To print the addresses on labels, insert blank sheets of Avery 5161 or 4" x 1" mailing labels in your printer.

Mailing Labels Export Report

Unified Platform ≡ Navigation Menu > Reports > Manage Reports > Residents/Management (Report Area) > Mailing Labels Export

Use the *Mailing Labels Export* report to generate a list of mailing labels for prospects, applicants, and/or residents. You can generate the report in a standard XML file format or CSV file format. The CSV format is generally used when exporting the data to Microsoft® Word® where you can use the mail merge feature to generate the address labels in any size you need.

Mailing Labels Export Options

Unified Platform ≡ Navigation Menu > Reports > Manage Reports > Residents/Management (Report Area) > Mailing Labels Export

The *Mailing Labels Export* report provides the following options used to select the information in the report and determine the report format.

Report Options

- **Generate Now:** To generate the report immediately, leave this option selected.
- **Schedule for Later:** To generate the report at a future date or time, select this option, and then perform the following:
  - Click the **Calendar** in the **Date** field, and then select the date you want to run the report.
  - Use the **Time** drop-down list to select the time when you want to generate the report. You can select any time of day in 30-minute increments.
- **Format:** Choose the report format. Available file types include:
  - **Standard XML:** To generate the report as an XML file, select this option. See **Viewing Completed Reports or Extracts** for information on viewing an XML report.
  - **CSV Export:** To generate the report as a CSV file, select this option. Reports generated in CSV format automatically download when completed.
- **Select Property:** Use this drop-down list to select the properties. You can scroll through the list or type a few characters of the property name in the **Search** field to find and select properties. Click the × **Clear** button in the **Search** field to type a new value. If you have access to only one property, the property is selected by default.
- **Send Email to External Recipient(s) upon Completion:** If you have the “External Report Distribution” right, you can type an email address in this field to send an email message to people outside of your organization. Use a semicolon to separate multiple email addresses. After the report is generated, an email message with a link to the report is sent.

- **Send Notification to Internal User(s) Upon Completion:** To send a notification to an internal user that the report is complete, use this drop-down list. You can select multiple users by selecting the check box beside each user you want to include.
- **Send File to Cloud Service upon Completion:** If you have the "External Report Distribution" right, you can use this drop-down list to select the cloud service account to which you want to send the report. After the report is generated, it is exported to the cloud service account's storage.

Parameters

- **Account Status:** Use the drop-down list to select the group of residents whom you want to print mailing labels for:
  - **All:** Select this option to print mailing labels for all residents (current, former, and pending).
  - **Current Residents:** Select this option to print mailing labels only for people that currently live at your property. Current residents can include residents who have given notice to transfer or move-out or only residents who are on-notice; this is controlled by the **On-notice accounts only** option below.
  - **Former Residents:** Select this option to print mailing labels for former residents who have moved out.
  - **Pending Residents:** Select this option to print mailing labels for applicants. This does not include waitlisted applicants or people whose applications were canceled or denied.
  - **Prospects:** Select this option to print mailing labels for prospects only.
  - **Waitlist Applicants:** Select this option to print mailing labels for waitlisted applicants only, select this option.
- **Ledger Account Status:** Use the drop-down list to select the account status to include in the report.
  - **All:** Select this option to include all residents, regardless of their account status.
  - **Delinquent:** Select this option to include only those residents with a delinquent ledger balance.
  - **Prepaid:** Select this option to include only those residents with a prepaid ledger balance.
  - **Zero:** Select this option to include only those residents with a zero ledger balance.
- **Include Unit Number in Address:** Activate this switch to print the unit number on the label. This option controls whether the unit number prints on line 2 of the address.
- **Include Head of Household Only:** Activate this switch to generate labels for the head of household only. Otherwise, the report prints labels for each person in the household.
- **Include Lease Signer:** Activate this switch to generate labels for each member of the household who is designated as a lease signer.

- **Include Employee:** Activate this switch to generate labels for each member of the household who is designated as an employee.
- **Sort By:** Use the drop-down list to sort the report by unit number or resident name.

Creating Mailing Labels in Microsoft Word

Before You Begin

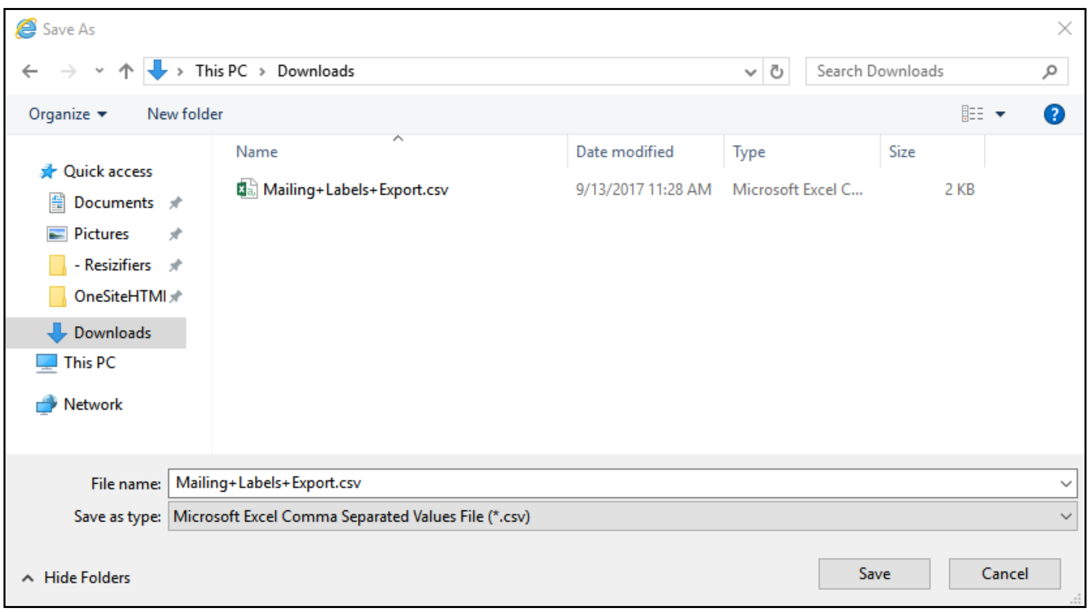
- You must have generated this report in the CSV format.
- Know the brand and size of the label sheets.

Saving the Report

1. Once the report has completed running, click the link in the **Most recent** column.
2. Click **Save as**.

If the report opens in Microsoft® Excel®, click the **File** *menu and select* **Save as**.

3. Select the desired folder, such as **Downloads**.



4. Enter a **File name**, and then click **Save**.

If an **Open** *button is available, click* **Open**, *and then click* **Save**.

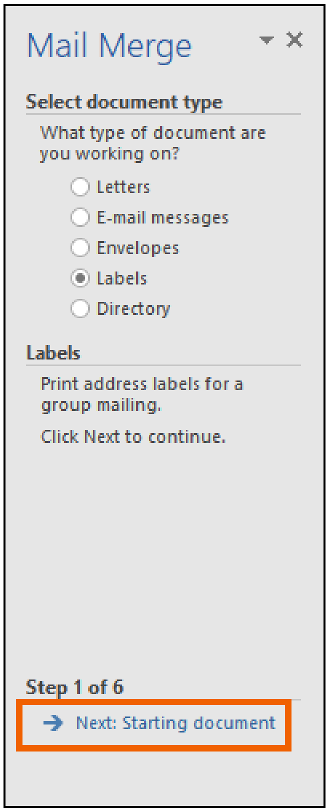
5. **Close** the report file.

Microsoft Word – Setting Up a New Label Main Document

1. Open a blank document in Microsoft Word®.
2. Select the **Mailings**, **Start mail merge** menu, and then click **Step by step mail merge wizard**.

Depending on your Word version, you may select the **Tools, Letters and Mailings** *menu, and then click* **Mail Merge**.

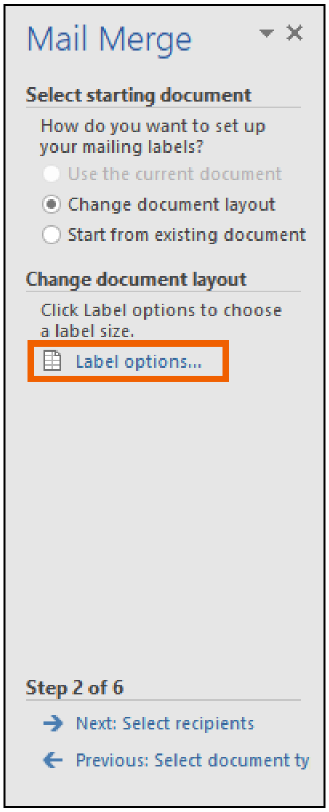
3. In the task pane under **Select document type**, click **Labels**.
4. Under **Step 1 of 6** at the bottom of the task pane, click **Next: Starting document**:



5. Under **Select starting document** of the task pane, click **Change document layout**.

   Why change the document layout? When you open Word, a blank document opens by default. That default document does not have a label layout. To create the labels, you must change the layout of the default document to a label layout.

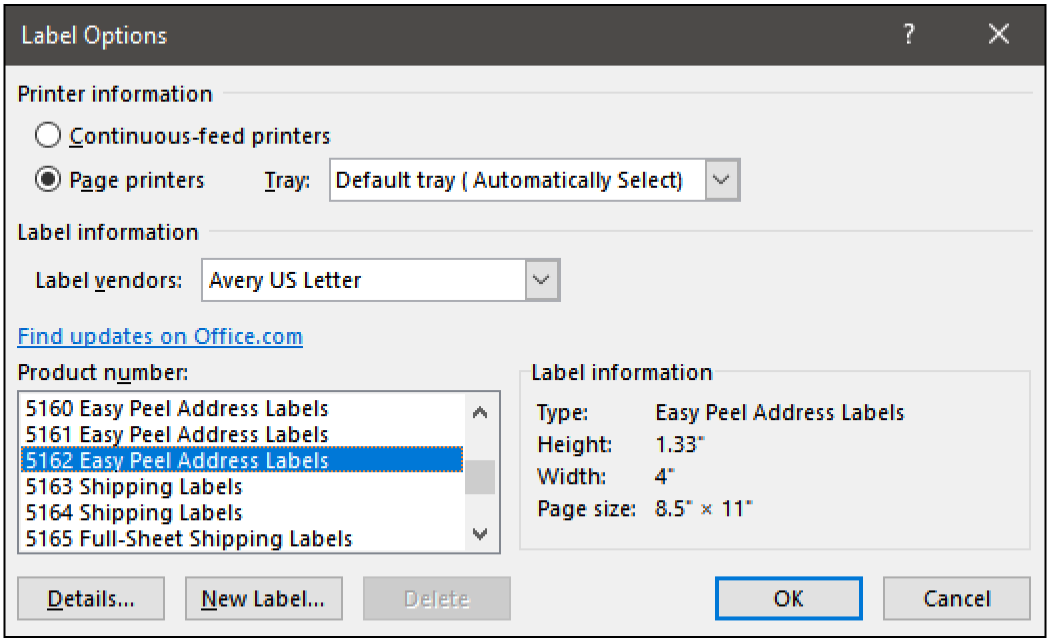
6. Under **Change document layout** of the task pane, click **Label options**.



7. In the **Label Options** dialog box, select the following items:

   - Printer type
   - Supplier that produced your label sheets

- Product number listed on your package of label sheets



If the product number for the label sheets that you bought do not match any of the choices in the **Label Options** *dialog box, carefully measure the labels on the sheet you have, take note of how many labels fit on a single sheet, and then use the* **New label** *button to create custom-sized labels.*

8. Click **OK**. A label document opens with the insertion point blinking in the first label.

If what you see on the screen looks like a regular document instead of labels, click **Table tools**, *select* **Borders**, *and then click* **Show Gridlines**. *This will show the label boundaries.*

9. Under **Step 2 of 6** at the bottom of the task pane, click **Next: Select recipient**.

Establishing a Connection between Your Label Mail Document and Your Data File

1. Under **Select recipients** of the task pane, click **Use an existing list**, since you already have a data file that contains your recipients' names and addresses.
2. Click **Browse**.
3. In the **Select Data Source** dialog box, locate the mailing labels export report file that you generated in OneSite and saved to your hard disk drive, select it, and then click **Open**.
4. In the **Mail Merge Recipients** dialog box, filter or sort the entries in the data file, if needed. Otherwise, click **OK**.
   - To eliminate one recipient, click the check box at the beginning of the recipient's row to clear it.

- To sort the rows according to the ascending or descending order of information in a particular column (for example, if you want to create the labels in alphabetical order by last name), click the column heading.
- To filter the list according to specific criteria (for example, all the people who live in a certain postal code), click the arrow next to a column heading.

  Any filtering and sorting changes that you make in the **Mail Merge Recipients** *dialog box does not affect the original data file.*

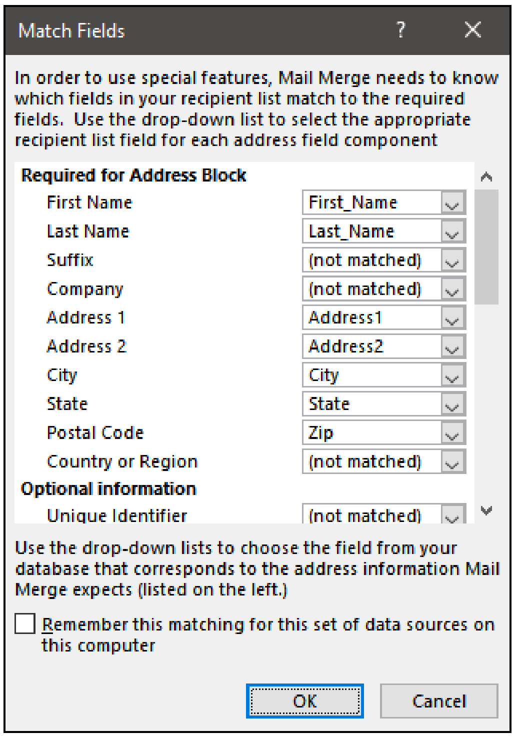
5. After you click **OK**, the **Mail Merge Recipients** dialog box closes, and you'll see **«Next Record»** fields on all the labels in your starting document. Do not delete them. The field names will not show up on your printed labels, and they are important in the next step of the process.

   To move to the next, click **Next: Arrange your labels**. It is **Step 3 of 6** at the bottom of the task pane.

Adding Placeholder Fields

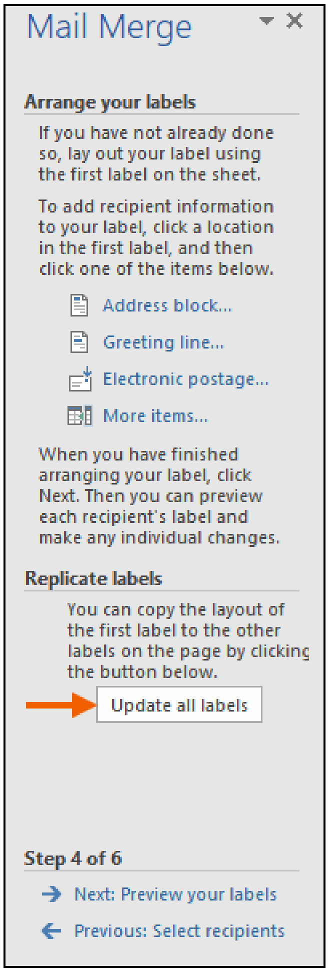
1. Click in the first label and place the insertion point at the position where you want to add an address field.
2. In the **Mail Merge** task pane, click **Address Block**.
3. Select the format of the recipient's name (how it will print on the labels) in the **Insert Address Block** dialog box. Generally, you will select the format that shows first name and last name, such as Josh Randall Jr.
4. If you want the company name to be inserted below the recipient's name on the label, leave the **Insert company name** check box selected.

5. Click **Match Fields**. In the **Match Fields** dialog box, address block elements are listed on the left and categories (column headings) from your data file are listed on the right. If you care about a “not matched” item, click the drop-down arrow and match an item from your data file to the item listed on the left. Leaving items unmatched is fine. In the example below, we do not care about salutations (Mr., Ms., and so on) and leave this item unmatched, as well as the company and spouse categories.



6. When you’re finished matching, click **OK**, and then click **OK** again to close the **Insert Address Block** dialog box.

7. An «**Address Block**» field appears on your label. You will copy this field to all labels. To do this, click **Update all labels** in the **Mail Merge** task pane, under **Replicate** labels.



The «**Address Block**» field is automatically copied on all the other labels. You are ready to preview your labels.

Previewing the Merged Labels and Completing the Merge

1. Click **Next: Preview your labels** at the bottom of the **Mail Merge** task pane (this is **Step 4 of 6**). Information from the data file replaces the placeholder fields on the labels. You will be able to see right away if the addresses are being displayed properly.

2. To page through the labels, click the double-arrow buttons in the task pane. Or, click **Find a recipient** to locate an address for a specific prospect, applicant, and/or resident.

   If you page through the labels to preview them, the label that you are currently previewing appears to be at the upper-left corner of the page. This is just for previewing purposes; the labels do not actually get shifted around on the page.

3. When you are satisfied with the way your labels look, click **Next: Complete the merge**. (This is **Step 5 of 6** at the bottom of the **Mail Merge** task pane.) An individual mailing address label is created for each person whose information was included in the data file.
4. This completes the process. You are now ready to print the labels. If needed, navigate backward through the mail merge steps and make changes to the document. To do this, click **Previous: Preview your labels**. (This is **Step 6 of 6** at the bottom of the **Mail Merge** task pane.)

Printing the Labels

1. Click **Print** in the **Mail Merge** task pane.
2. In the **Merge to Printer** dialog box, you have three choices:
   - **All:** This option will print the entire set of merged labels.
   - **Current:** This option will print only the labels on the page that is currently displayed.
   - **From:** This option will print a range of labels. This could be any range across any number of pages. Enter record numbers in the **From** and **To** boxes. In the label document, the first label in the upper-left corner of the first page of labels is record 1. Record 2 is the label to the right of the first label, and so on until you reach the last label.
3. After choosing the labels that you want to print, click **OK**.
4. In the **Print** dialog box, choose your printer and other options.
5. Make sure that your label sheets are ready to feed into the printer and that you have chosen the appropriate paper source (for example, the tray that contains the label sheets). Also, make sure that your printer is set up to print on only one side of the sheets. You usually indicate the paper source by clicking **Properties** in the **Print** dialog box.
6. Click **OK**.

Reusing the Label Main Document

1. Save the document. This saves the document's connection to the data file and its formatting, which makes the process of creating a set of labels faster and easier in the future.
2. The next time you open the document, a message appears, notifying you that information from a data file will be placed in the document. Click **Yes** to continue.
3. On the **Tools** menu, point to **Letters and Mailings**, and then click **Mail Merge**. The **Mail Merge** task pane opens at the **Select recipients** step, where you can choose the data file that you want to connect to. This can be a new mailing labels export report generated from OneSite.
   - If you want to use the same data file without any filtering or sorting, just click **Next: Arrange your labels**, and continue through the mail-merge process.

- If you want to filter or sort the list of recipients from the data file to create a new set of labels, click **Edit recipient list**.
- If you want to merge recipient information from a different data file, click **Select a different list**.

Minnesota Certificate of Rent Paid (CRP) Report

Unified Platform ≡ Navigation Menu > Reports > Manage Reports > Residents/Management (Report Area) > Minnesota Certificate of Rent Paid (CRP)

The *Minnesota Certificate of Rent Paid (CRP)* report shows certificate of rent paid information for residents. Generate it for the current year or the previous year. The Excel format allows uploading to the Minnesota e-Services website for reporting.

Minnesota Certificate of Rent Paid (CRP) Options

Unified Platform ≡ Navigation Menu > Reports > Manage Reports > Residents/Management (Report Area) > Minnesota Certificate of Rent Paid (CRP)

The *Minnesota Certificate of Rent Paid (CRP)* report provides the following options used to select the information in the report and determine the report format.

Report Options

- **Generate Now:** To generate the report immediately, leave this option selected.
- **Schedule for Later:** To generate the report at a future date or time, select this option, and then perform the following:
    - Click the **Calendar** in the **Date** field, and then select the date you want to run the report.
    - Use the **Time** drop-down list to select the time when you want to generate the report. You can select any time of day in 30-minute increments.
- **Format:** Choose the report format. Available file types include:
    - **Excel:** To generate the report as an XLS file, select this option. Reports generated as Excel files are downloaded to your device automatically when completed.
- **Select Property:** Use this drop-down list to select the properties. You can scroll through the list or type a few characters of the property name in the **Search** field to find and select properties. Click the ✕ **Clear** button in the **Search** field to type a new value. If you have access to only one property, the property is selected by default.
- **Send Email to External Recipient(s) upon Completion:** If you have the “External Report Distribution” right, you can type an email address in this field to send an email message to people outside of your organization. Use a semicolon to separate multiple email addresses. After the report is generated, an email message with a link to the report is sent.
- **Send Notification to Internal User(s) Upon Completion:** To send a notification to an internal user that the report is complete, use this drop-down list. You can select multiple users by selecting the check box beside each user you want to include.
- **Send File to Cloud Service upon Completion:** If you have the “External Report Distribution” right, you can use this drop-down list to select the cloud service account to which you want

to send the report. After the report is generated, it is exported to the cloud service account's storage.

Parameters

- **Year:** Use the drop-down list to select the **Current Year** or **Previous Year** as follows:
  - **Current Year:** Select the current year when you are processing certificates of rent paid in the current calendar year.
  - **Previous Year:** Select the previous year when you are processing certificates of rent paid in January for the previous calendar year.
- **Minnesota ID:** This option appears if you selected one property from the **Select Property** drop-down list and the property has activated the feature that sets the Minnesota ID at the property or building level in the *Certificate of Rent Paid (CRP)* section on the **Residents** page in Unified Settings.

  Use this option to select **All** Minnesota ID numbers associated with the property or a **(Specific Minnesota ID)** number associated with a building. Selecting **All** generates a report for all CRP-eligible residents in units of buildings assigned to Minnesota ID numbers.

  Selecting a specific Minnesota ID number generates a report for CRP-eligible residents in units of the building assigned to the ID number.

  If the drop-down list contains only one Minnesota ID number and excludes the **All** option, then the property has set the Minnesota ID at the property level. Select the ID number to generate the property report.

  Residents are CRP-eligible if the **Generate Certificate of Rent Paid** check box is selected on the **General Information** page in the **Edit Household Member** pane, available on the **People** tab on the resident's **Account Profile** page.

  You can assign a Minnesota ID number to a building in the **Edit Building** pane on the **Buildings** page in **Items and Services**.

  Selecting multiple properties generates reports for each property for the current or previous year. All Minnesota ID numbers appear on each property's report. (There is no **Minnesota ID** option when generating the report for multiple properties.)

Minnesota Certificate of Rent Paid (CRP) Columns

Unified Platform: ≡ Navigation Menu > Reports > Manage Reports > Last Run Date > View Report

Minnesota Certificate of Rent Paid (CRP) Columns

This report shows certificate of rent paid information for residents at a Minnesota property.

- **Owner:** This column is False for each resident.

- **Owner Name:** This is the name of the owner from the **Legal Entities and Institutional Owners** list on the **Management Companies, Owners, and Portfolio** page in company setup. The report pulls all owner information from this page.
- **Owner Street:** This is the owner's address.
- **Owner City:** This is the city of the owner's address.
- **Owner State:** This is the state of the owner's address.
- **Owner Zip:** This is the ZIP code of the owner's address.
- **Owner Phone:** This is the owner's phone number.
- **Adult Foster Care:** This is True if this type is selected in the **Portfolio** list on the **Management Companies, Owners, and Portfolio** page in company setup. This is false if the type is not selected.
- **Assisted Living:** This is True if this type is selected in the **Portfolio** list on the **Management Companies, Owners, and Portfolio** page in company setup. This is false if the type is not selected.
- **Intermediate Care Facility:** This is True if this type is selected in the **Portfolio** list on the **Management Companies, Owners, and Portfolio** page in company setup. This is false if the type is not selected.
- **Nursing Home:** This is True if this type is selected in the **Portfolio** list on the **Management Companies, Owners, and Portfolio** page in company setup. This is false if the type is not selected.
- **Mobile Home:** This is True if this type is selected in the **Portfolio** list on the **Management Companies, Owners, and Portfolio** page in company setup. This is false if the type is not selected.
- **Mobile Home Lot:** This is True if this type is selected in the **Portfolio** list on the **Management Companies, Owners, and Portfolio** page in company setup. This is false if the type is not selected.
- **Property ID:** This is the property's tax or assessment ID. Depending on whether the property sets the ID at the property or building level, you can specify the ID in the **Minnesota Property ID** field in the *Certificate of Rent Paid (CRP)* section on the **Residents** page in Unified Settings or an ID for each building in the **Edit Building** pane on the **Buildings** page in **Items and Services** in new OneSite.
- **Number of Units on This Property:** This is the total units on this property.
- **Renter Last Name:** This is the last name of the (lease-signer) resident.
- **Renter First Name:** This is the first name of the resident.
- **Renter Middle Initial:** This is the resident's middle initial.
- **Rental Street:** This is the street of the unit address. You can modify it in the **Edit Unit** pane on the **Units** page in new OneSite.
- **Rental Unit:** This is the resident's unit number.
- **Rental City**: This is the city of the unit address.

- **Rental State:** This is the state of the unit address.
- **Rental Zip:** This is the ZIP code of the unit address.
- **County:** This is the county of the unit address.
- **Rented From:** This is the earliest date in the current or previous year the resident was renting.
- **Rented To:** This is the latest date in the current or previous year the resident was renting. For example, if you generate the report in January for the previous year, the system looks for charges billed from January 1 – December 31 in the previous year.
- **Total Months Rented:** This is the total months rented.
- **Num. Of Adults:** This is the number of lease signers in the unit included in the certificate of rent paid process. The **Generate Certificate of Rent Paid** option is enabled on the **General Information** page on the **People** tab on the member's **Account Profile**.
- **Medical Assistance:** This is True if the resident paid medical assistance expenses during the year. This is false if the Resident ledger has no medical assistance charges.
- **Medical Assistance Amount:** This is the total amount of medical assistance paid during the year. This is blank if the resident paid no medical assistance.
- **Housing Support:** This is True if the resident paid housing support expenses during the year. This is false if the Resident ledger has no housing support charges.
- **Housing Support Amount:** This is the total amount of housing support paid during the year. This is blank if the resident paid no housing support.
- **Renter's Share of Rent:** This is this resident's share of rent.
- **Caretaker Reduction:** This is the total caretaker concession.
- **Total Rent Paid:** This is the resident's total rent paid for the Minnesota CRP reporting.
- **Managing Agent Name:** This is the name of the property's management company in the **Portfolio** list on the **Management Companies, Owners, and Portfolio** page in company setup.

  When there is no managing agent defined in company setup, the report shows the property manager name. Select the **Contact Information** *page on the* **Property Details** *tile in property setup to view the name in the* **Property Manager First Name** *and* **Property Manager Last Name** *fields.*

- **Managing Agent Phone:** This is the management company's phone number in the **Management Companies** list on the **Management Companies, Owners, and Portfolio** page in company setup.

  When there is no managing agent defined in company setup, the report shows the phone number for the property. Select the **Contact Information** *page on the* **Property Details** *tile in property setup to view the property phone number in the* **Office Primary Phone Number** *field.*

Monthly Activity Summary Report

Unified Platform ≡ Navigation Menu > Reports > Manage Reports > Residents/Management (Report Area) > Monthly Activity Summary

The *Monthly Activity Summary* report summarizes occupancy and accounting activity by floor plan. The first section of the report shows occupancy statistics. The report totals the number of units and square footage in each floor plan, and then totals the number of occupied units, vacancies, notices, and down units from the occupancy activity date (that you provide) through the current property date.

The second section summarizes accounting activity by floor plan. The report totals move-ins, move-outs, renewals, rent and other charges, payments, and deposits from the accounting activity date (that you provide) through the current property date.

The last section shows detailed leasing activity. It lists the names of residents and the activities that occurred from the occupancy activity date through the current property date. This section includes move-ins, move-outs, renewals, and other activities.

Monthly Activity Summary Options

Unified Platform ≡ Navigation Menu > Reports > Manage Reports > Residents/Management (Report Area) > Monthly Activity Summary

The *Monthly Activity Summary* report provides the following options used to select the information in the report and determine the report format.

Report Options

- **Generate Now:** To generate the report immediately, leave this option selected.
- **Schedule for Later:** To generate the report at a future date or time, select this option, and then perform the following:
  - Click the **Calendar** in the **Date** field, and then select the date you want to run the report.
  - Use the **Time** drop-down list to select the time when you want to generate the report. You can select any time of day in 30-minute increments.
- **Format:** Choose the report format. Available file types include:
  - **PDF:** To generate the report as a PDF file, select this option. Reports generated as PDF files appear on a new browser tab when completed.
  - **Word:** To generate the report as a DOC file, select this option. Reports generated in Word format automatically download when completed.
  - **Excel:** To generate the report as an XLS file, select this option. Reports generated as Excel files are downloaded to your device automatically when completed.

- **Select Property:** Use this drop-down list to select the properties. You can scroll through the list or type a few characters of the property name in the **Search** field to find and select properties. Click the × **Clear** button in the **Search** field to type a new value. If you have access to only one property, the property is selected by default.
- **Send Email to External Recipient(s) upon Completion:** If you have the "External Report Distribution" right, you can type an email address in this field to send an email message to people outside of your organization. Use a semicolon to separate multiple email addresses. After the report is generated, an email message with a link to the report is sent.
- **Send Notification to Internal User(s) Upon Completion:** To send a notification to an internal user that the report is complete, use this drop-down list. You can select multiple users by selecting the check box beside each user you want to include.
- **Send File to Cloud Service upon Completion:** If you have the "External Report Distribution" right, you can use this drop-down list to select the cloud service account to which you want to send the report. After the report is generated, it is exported to the cloud service account's storage.

Parameters

- **Accounting Activity Start Date:** Type the A/R start date in this field, or click the **Calendar** to select the date. Transaction amounts posted on this date through the current property date are reported.
- **Occupancy Activity Start Date:** Type the start date for occupancy activities in this field, or click the **Calendar** to select the date. An occupancy activity is any leasing activity, such as a move-in, move-out, transfer notice, or lease approval.
- **Subtotals By:** Use the drop-down list to select whether to group floor plans by name or floor plan code.

Monthly Activity Summary Columns

Unified Platform: ≡ Navigation Menu > Reports > Manage Reports > Last Run Date > View Report

The report title is printed at the top of the report followed by the property name. The report "as of" date is the current property date, and it appears beneath the report title. The parameters that you selected at the report options page display in the *Parameters* section at the left of the page.

The report is divided into three sections. Each of the sections and columns are described below.

(Occupancy Activity)

This section lists occupancy and vacancy statistics by floor plan. The report includes units that are vacant or occupied from the occupancy activity date (entered at the report parameters page) through the current property date.

- **Floor Plan:** This is the name of the floor plan.

- **Market Rent:** This is the total market rent for all units associated with this floor plan at the **Units** page in property setup. Market rent includes all standard floor plan amenities (these costs are factored into base rent), plus all premium unit amenities (these costs are added to base rent), plus additional charges and credits defined for each unit at the **Change rent amounts by unit** page in setup.
- **Total Base Rent:** This is the total base rent (base rent comes from the floor plan) for all units associated with this floor plan at the **Units** page in property setup. Base rent includes the standard floor plan amenities shared by all units in this floor plan. Premium unit amenities and additional charges and credits are excluded from base rent.
- **Total SQFT:** This is the total square footage of all units in this floor plan.
- **Total Units:** This is the total number of units included in this floor plan.
- **Occupied No NTV:** This is the total number of occupied units that aren’t on notice. The resident hasn’t given notice to transfer or move out.
- **Vacant Not Leased:** This is the number of vacant units that are not leased in this floor plan.
- **Vacant Leased:** This is the number of vacant units that are leased (but are not yet occupied) in this floor plan.
- **Occupied NTV Not Leased:** This is the total number of units in this floor plan that are currently occupied but notice to vacate has been given. Also, the units aren’t pre-leased. The notice can be a transfer or move-out notice.
- **Occupied NTV Leased:** This shows the total number of units in this floor plan that are currently occupied but notice to vacate has been given. Also, the units are pre-leased. The notice can be a transfer or move-out notice.
- **Vacant Administrative:** This is the number of vacant units that are flagged as unavailable for any reason other than “down” in this floor plan. That is, unavailable units that are flagged as employee, corporate, storage, under construction or rehab, model, or deleted units in setup are counted in this column.
- **Vacant Down:** This is the number of vacant units that are unavailable in this floor plan, and the reason is “down.”
- **Totals:** This row prints below the last floor plan in this section. Each column is totaled.

(Accounting Activity)

This is the second section of the report. It summarizes charge, payment, and credit transactions by floor plan. Transactions posted since the accounting activity date (entered at the report options page) through the current property date are counted.

- **Floor Plan:** This is the name of the floor plan.
- **Move-Ins:** This is the total number of residents who have moved into units in this floor plan. The move-in date must be on or between the occupancy activity date and the current property date to be included on the report.

- **Move-Outs:** This is the total number of residents who have moved out of units in this floor plan. The move-out date must be on or between the occupancy activity date and the current property date to be included on the report.
- **Cancellations/Rejections:** This is the total number of applicants or potential residents whose lease applications were canceled or rejected. The application must have been canceled or denied on or between the occupancy activity date and the current property date to be included on the report. The **Activity** tab within the **Applicant at a glance** page shows the date the lease application was canceled or rejected for an applicant.
- **Renewals:** This is the number of leases that have been renewed during the current period. The renewal date must be on or between the occupancy activity date and the current property date to be included on the report. The **Activity** tab within the **Resident at a glance** page shows the date a resident renewed his or her lease.
- **Leases:** This is the number of new leases signed during the current period. These are applicants who have completed the **Apply now** or **Waitlist** wizard on or between the occupancy activity date and the current property date. The applicants have not yet moved in.
- **Rent Charged:** This is the total amount of CA-type transactions (charges and credits) for units in this floor plan. The CA-type transaction must be posted on or between the accounting activity date and the current property date.
- **Other Charges:** This is the total amount of all other charges for the units in this floor plan. The charges must be posted on or between the accounting activity date and the current property date to be included on the report.
- **Payments:** This is the total of all payments received for units in this floor plan. The payments must be posted on or between the accounting activity date and the current property date to be included on the report.
- **Other Credits:** This is the total of all credits received for units in this floor plan on or between the accounting activity date and the current property date.
- **Deposits In:** This is the total amount of deposits that were received from residents and posted on or between the accounting activity date and the current property date for units in this floor plan.
- **Deposits Out:** This is the total amount of deposits refunded to former residents on or between the accounting activity date and the current property date for units in this floor plan.
- **Totals:** This row prints below the last floor plan in this section. Each column is totaled. **Total Move-Ins** includes the total number of move-ins and transfers from the *Leasing Activity* section below.

(Leasing Activity)

This section lists leasing activity. The report groups residents by leasing activity (or action), and then totals the number of residents or applicants with that activity. The columns are described below from left to right on the page:

- **Bldg/Unit:** This is the building/unit number of the resident.
- **Status:** This is the current residency status following this action. The status will either be applicant, current resident, or former resident.
- **Name:** This is the name of the resident who had this action.
- **Action:** This is the type of action this resident had. The report includes these leasing actions:
    - Lease approved: This lists all the residents whose leases were approved during the report period. Your property may/may not require a lease to be approved before a person moves in; this depends on your property's move-in settings.
    - Moved in
    - Moved out
    - Move-out notice
    - Transfer notice
    - Renewed lease
    - Transferred to new unit: The total number of transfers is included in the total move-ins count.
- **Date:** This is the date the action occurred. The activity must have occurred on or between the occupancy activity date and the current activity date.
- **Total (activity):** This row shows the total number of applicants and residents for each leasing activity.

Parking/Vehicle Information Report

Unified Platform ≡ Navigation Menu > Reports > Manage Reports > Residents/Management (Report Area) > Parking/Vehicle Information

The *Parking/Vehicle Identification* report lists all of the vehicles that have been set up in OneSite for residents and applicants at your property. You can sort vehicles by parking space number, unit number, car make (manufacturer's name), or by license plate number.

For each vehicle, the report lists the parking space number, license plate number, vehicle type, make, model, year, and color. The vehicle information is followed by the household name, unit number, and phone numbers (home and work). The information in this report is taken from the **Miscellaneous** tab of the **Residents** page. If you have set up parking spaces as a type of rentable item, this report does not print the parking space number unless you entered the number in the **Parking Assignment** field of the **Vehicle Information** page at the **Miscellaneous** tab. (Use the *Rentable and Assignable Items Status* report instead.)

Parking/Vehicle Information Options

Unified Platform ≡ Navigation Menu > Reports > Manage Reports > Residents/Management (Report Area) > Parking/Vehicle Information

The *Parking/Vehicle Information* report provides the following options used to select the information in the report and determine the report format.

Report Options

- **Generate Now:** To generate the report immediately, leave this option selected.
- **Schedule for Later:** To generate the report at a future date or time, select this option, and then perform the following:
  - Click the **Calendar** in the **Date** field, and then select the date you want to run the report.
  - Use the **Time** drop-down list to select the time when you want to generate the report. You can select any time of day in 30-minute increments.
- **Format:** Choose the report format. Available file types include:
  - **PDF:** To generate the report as a PDF file, select this option. Reports generated as PDF files appear on a new browser tab when completed.
  - **Word:** To generate the report as a DOC file, select this option. Reports generated in Word format automatically download when completed.
  - **Excel:** To generate the report as an XLS file, select this option. Reports generated as Excel files are downloaded to your device automatically when completed.
- **Select Property:** Use this drop-down list to select the properties. You can scroll through the list or type a few characters of the property name in the **Search** field to find and select

properties. Click the ✕ **Clear** button in the **Search** field to type a new value. If you have access to only one property, the property is selected by default.

- **Send Email to External Recipient(s) upon Completion:** If you have the “External Report Distribution” right, you can type an email address in this field to send an email message to people outside of your organization. Use a semicolon to separate multiple email addresses. After the report is generated, an email message with a link to the report is sent.
- **Send Notification to Internal User(s) Upon Completion:** To send a notification to an internal user that the report is complete, use this drop-down list. You can select multiple users by selecting the check box beside each user you want to include.
- **Send File to Cloud Service upon Completion:** If you have the “External Report Distribution” right, you can use this drop-down list to select the cloud service account to which you want to send the report. After the report is generated, it is exported to the cloud service account’s storage.

Parameters

- **Sort By**: Use the drop-down list to select the sort method for the report. The report can be sorted four different ways:
    - **Parking Space:** Select this option to list vehicle by assigned parking space numbers. This is the default selection.
    - **Unit:** Select this option to sort by building (if buildings are used at the property) and unit number.
    - **Car Make:** Select this option to sort by car make (the name of the vehicle manufacturer).
    - **License Number:** Select this option to sort by license plate number. The report lists numbered plates before those that begin with letters.

Parking/Vehicle Information Columns

Unified Platform: ≡ Navigation Menu > Reports > Manage Reports > Last Run Date > View Report

The company and property names display at the top of the report, followed by the report date, which is the current property date. The system date and time that you generated the report are listed at the left of the page. The report prints one detail line for each vehicle, including vehicles entered for current residents, applicants, and waitlisted applicants. The columns are as follows from left to right on the page:

- **Parking Space:** This is the parking space assigned to the vehicle (if any).
- **Lic. Plate #:** This is the license plate name or number.
- **Vehicle Type:** This is the type of vehicle, such as a car, truck, or boat.
- **Make:** This column shows the name of the vehicle manufacturer.
- **Model:** This is the model name, such as Accord or Blazer.

- **Year:** This is the model year of manufacture of the vehicle.
- **Color:** This is the color or colors of the vehicle.
- **Household Name:** This is the household name. This is not the name of the vehicle’s owner.
- **Unit:** This is the building (if buildings are used at the property) and unit number of the household.
- **Home Phone:** This is the home phone number of the vehicle owner.
- **Work Phone:** This is the work phone number of the vehicle owner.

Pending Tasks Report

Unified Platform ≡ Navigation Menu > Reports > Manage Reports > Residents/Management (Report Area) > Pending Tasks

When advancing the property date, OneSite presents a list of tasks for you to complete or reschedule. The *Pending Tasks* report lets you preview future scheduled tasks to determine if any require editing. The report lists the tasks that are due within the range of dates specified at report submission. Only resident tasks are reported; billing-type tasks are excluded.

The report is divided into several sections:

- **Move-Outs:** This section lists each resident whose scheduled move-out date falls within the selected date range.
- **Transfers:** This section lists each resident on-notice to transfer whose transfer-in or transfer-out date falls within the selected date range.
- **Leases Expiring:** This section lists residents whose lease end dates fall within the selected date range.
- **Final Account Statements:** This section appears on the report only if your property has enabled the feature that allows OneSite to remind you to close accounts. This section lists former residents whose final account statements are due during the report period. A final account statement's due date is based on the move-out date and the number of days following a move-out a final account statement is to be completed, as defined in your property's move-out settings.

  The report can also include final accounts statements of canceled and denied applicants, if this feature is enabled in your property's FAS settings.

Each task shows the head of household name, the building and unit number, the task due date, and lease information. A single line prints for each task. You can confirm at a glance whether the information is correct or it should be edited before the task can be completed.

Pending Tasks Options

Unified Platform ≡ Navigation Menu > Reports > Manage Reports > Residents/Management (Report Area) > Pending Tasks

The *Pending Tasks* report provides the following options used to select the information in the report and determine the report format.

Report Options

- **Generate Now:** To generate the report immediately, leave this option selected.
- **Schedule for Later:** To generate the report at a future date or time, select this option, and then perform the following:

    - Click the Calendar in the **Date** field, and then select the date you want to run the report.
    - Use the **Time** drop-down list to select the time when you want to generate the report. You can select any time of day in 30-minute increments.
- **Format:** Choose the report format. Available file types include:
    - **PDF:** To generate the report as a PDF file, select this option. Reports generated as PDF files appear on a new browser tab when completed.
    - **Word:** To generate the report as a DOC file, select this option. Reports generated in Word format automatically download when completed.
    - **Excel:** To generate the report as an XLS file, select this option. Reports generated as Excel files are downloaded to your device automatically when completed.
- **Select Property:** Use this drop-down list to select the properties. You can scroll through the list or type a few characters of the property name in the **Search** field to find and select properties. Click the ✕ **Clear** button in the **Search** field to type a new value. If you have access to only one property, the property is selected by default.
- **Send Email to External Recipient(s) upon Completion:** If you have the "External Report Distribution" right, you can type an email address in this field to send an email message to people outside of your organization. Use a semicolon to separate multiple email addresses. After the report is generated, an email message with a link to the report is sent.
- **Send Notification to Internal User(s) Upon Completion:** To send a notification to an internal user that the report is complete, use this drop-down list. You can select multiple users by selecting the check box beside each user you want to include.
- **Send File to Cloud Service upon Completion:** If you have the "External Report Distribution" right, you can use this drop-down list to select the cloud service account to which you want to send the report. After the report is generated, it is exported to the cloud service account's storage.

Parameters

- **Start Date:** Use the **Calendar** to select a start date for the report. The report will include information for scheduled tasks occurring on or between the report start and end dates.
- **End Date:** Use the **Calendar** to select an end date for the report. The report will include information for scheduled tasks occurring on or between the report start and end dates.
- **Subproperty:** Use the drop-down list to select a subproperty to report tasks for a specific property. Select **All** to include all units at the property.

Pending Tasks Columns

Unified Platform: ≡ Navigation Menu > Reports > Manage Reports > Last Run Date > View Report

The *Pending Tasks* report is divided into the following sections, based on the task type. If no tasks are due within a particular section, that section is excluded in the report. Each of the sections and columns are described below.

Move-Ins

This section lists each applicant whose scheduled move-in date falls within the selected date range.

- **Bldg/Unit:** This is the building (if buildings are used) and unit number the applicant has selected to lease.
- **Name:** This is the head of household name.
- **Scheduled Move-In Date:** This is the scheduled move-in date.
- **Lease Approved:** If the lease has been approved (as noted in OneSite), this is Y; otherwise, this is N. This allows you to view, at a glance, if the lease is approved.
- **Lease Signed:** If the lease has been signed (as noted in OneSite), this is Y; otherwise, this is N. This allows you to view, at a glance, if the applicant has signed the lease.
- **Lease Begin Date:** This is the lease start date.
- **Lease End Date:** This is the lease end date.
- **Lease Rent:** This is the sum of all CA-type charges, plus any other charges grouped to rent in scheduled billing.
- **Ledger Balance:** This is the current ledger balance on the account.
- **1st Installment Payment:** Currently, this option has no functionality.
- **Other Recurring Charges:** This is the sum of any other charges in scheduled billing (non-CA types and charges not grouped to rent).
- **Other Recurring Credits:** This is the sum of any credits (P-types) in scheduled billing.

Skips/Breaks

This section is displayed if your property implemented skip handling, and this feature is set up to move out skip/break residents on their lease end date or when another resident moves in (whichever is earlier). This section includes all skips and breaks that have not yet been moved out in OneSite, regardless of when the skip or break occurred.

- **Bldg/Unit:** This is the building (if buildings are used) and unit number of the skip or break.
- **Name:** This is the head of household name (last, first).

- **Skip/Break Date:** This is the skip date that was entered when the skip was recorded in the **Give notice** box. For breaks, this is the notice given for date (which is also the lease end date, unless the date was changed in the **Give notice** box).
- **Type:** This indicates whether the notice is a “Skip” or “Break.” This was specified when the notice was entered for the resident.
- **Notice Given Date:** This is the notice given on date that was entered when the skip or break was recorded.
- **Notice Given For:** This is the notice given for date that was entered when the skip or break was recorded. This is also the scheduled move-out (or lease end) date, unless the date was changed in the **Give notice** box.
- **Lease End Date:** This is the lease end date of the current active lease.
- **Deposits on Hand:** This is the deposit balance from the resident’s deposit ledger.
- **Ledger Balance:** This is the balance from the resident’s ledger.

Move-Outs

This section lists each resident on-notice to move out whose scheduled move-out date falls within the selected date range.

- **Bldg/Unit:** This is the building (if buildings are used) and unit number.
- **Name:** This is the head of household name.
- **Scheduled Move-Out Date:** This is the scheduled move-out date.
- **Lease End Date:** This is the lease end date of the current active lease.
- **Notice Given Date:** This is the date notice was given. This allows you to see, at a glance, if proper notice was given.
- **Deposits on Hand:** This is the balance from the deposit ledger.
- **Ledger Balance:** This is the balance from the Resident ledger.

Transfers

This section shows who is on-notice to transfer. If transfers are not allowed (based on your **Resident management – General settings** in property setup) or there are no pending transfers, this section is excluded from the report.

- **Bldg/Unit:** This is the building (if buildings are used) and unit.
- **Name:** This is the head of household name.
- **Scheduled Transfer-Out Date:** This is the scheduled move-out date. If the transfer-in and transfer-out is performed on the same date, the actual move-out is recorded.
- **Scheduled Transfer-In Date:** This is the scheduled move-in date for the new unit. If the transfer-in has been completed but the transfer-out has not, “Completed” appears in this column. This lets you know that the transfer-out portion of the transfer is still scheduled.
- **To Bldg/Unit:** This is the building (if buildings are used) and unit number of the new (transfer in) unit.

- **Original Move-In Date:** This is the original move-in date for this lease.
- **Deposits on Hand:** This is the balance from the deposit ledger.
- **Ledger Balance:** This is the balance from the resident ledger.

Leases Expiring

This section lists current leases that end within the selected date range. Leases are sorted by lease expiration date.

- **Bldg/Unit:** This is the building (if buildings are used) and unit number.
- **Name:** This is the head of household name.
- **Original Move-In Date:** This is the original move-in date for this lease.
- **Lease Expiration Date:** This is the date the lease is scheduled to expire.
- **Renewal Start Date:** If the lease has been renewed, this is the start date of the upcoming renewal.
- **Reason for Not Renewing:** If the resident did not renew, this is the reason given for not renewing.

Final Account Statements

This section lists former residents, and possibly canceled and denied applicants (based on your property's move-out settings), whose final account statements are due.

- **Bldg/Unit:** This is the building (if buildings are used) and unit number.
- **Name:** This is the head of household name.
- **Due Date:** This is the due date for the final account statement, which is based on the number of days after move-out to complete the final account statement. (The number of days is based on your move-out settings in property setup.) If no number of days is defined, the report includes all final account statements that have not yet been completed.

  If your property requires final account statements for canceled or denied applicants, the due date of a final account statement is based on the date the application was canceled or denied.
- **Move-Out Date:** This is the move-out date. This is blank for canceled or denied applicants.
- **Lease Expiration Date:** This is the date the lease is scheduled to expire or did expire.
- **Deposits on Hand:** This is the balance from the deposit ledger.
- **Ledger Balance:** This is the balance from the resident ledger.

Projected Occupancy Report

Unified Platform ≡ Navigation Menu > Reports > Manage Reports > Residents/Management (Report Area) > Project Occupancy

The *Projected Occupancy* report calculates the number of scheduled move-ins and move-outs on a weekly basis to help you project occupancy at your site from 4 to 52 weeks in the future.

The report shows the number and percentage of occupied units at the start and end of each week, the number of move-ins and move-outs scheduled during the week, and the projected occupancy. This format makes it easy for you to compare occupancy on a week-by-week basis and determine if any concessions or specials are needed during low occupancy periods.

Projected Occupancy Options

Unified Platform ≡ Navigation Menu > Reports > Manage Reports > Residents/Management (Report Area) > Projected Occupancy

The *Projected Occupancy* report provides the following options used to select the information in the report and determine the report format.

Report Options

- **Generate Now:** To generate the report immediately, leave this option selected.
- **Schedule for Later:** To generate the report at a future date or time, select this option, and then perform the following:
  - Click the **Calendar** in the **Date** field, and then select the date you want to run the report.
  - Use the **Time** drop-down list to select the time when you want to generate the report. You can select any time of day in 30-minute increments.
- **Format:** Choose the report format. Available file types include:
  - **PDF:** To generate the report as a PDF file, select this option. Reports generated as PDF files appear on a new browser tab when completed.
  - **Word:** To generate the report as a DOC file, select this option. Reports generated in Word format automatically download when completed.
  - **Excel:** To generate the report as an XLS file, select this option. Reports generated as Excel files are downloaded to your device automatically when completed.
- **Select Property:** Use this drop-down list to select the properties. You can scroll through the list or type a few characters of the property name in the **Search** field to find and select properties. Click the × **Clear** button in the **Search** field to type a new value. If you have access to only one property, the property is selected by default.
- **Send Email to External Recipient(s) upon Completion:** If you have the “External Report Distribution” right, you can type an email address in this field to send an email message to

people outside of your organization. Use a semicolon to separate multiple email addresses. After the report is generated, an email message with a link to the report is sent.

- **Send Notification to Internal User(s) Upon Completion:** To send a notification to an internal user that the report is complete, use this drop-down list. You can select multiple users by selecting the check box beside each user you want to include.
- **Send File to Cloud Service upon Completion:** If you have the “External Report Distribution” right, you can use this drop-down list to select the cloud service account to which you want to send the report. After the report is generated, it is exported to the cloud service account’s storage.

Parameters

- **Subproperty:** To view projected occupancy for one subproperty, use the drop-down list to select the property number from the drop-down list. To view projected occupancy for all of the units at the property, select **All subproperties**.
- **Day Occupancy Week Begins:** Use the drop-down list to select the day of the week you want to begin calculating occupancy statistics. For example, if the current property date falls on Tuesday and you select **Monday**, OneSite calculates occupancy statistics for the week that begins on the following Monday. Similarly, if the current property date falls on Friday and you select **Friday**, OneSite calculates occupancy statistics for the week that begins on the following Friday.
- **Number of Weeks to Project Out:** Use the drop-down list to select the number of weeks to report. You can select from **4** to **52** weeks.

Projected Occupancy Columns

Unified Platform: ≡ Navigation Menu > Reports > Manage Reports > Last Run Date > View Report

The report title and current property date appear at the top of the report. The system date and time the report was generated and the report parameters appear on the side of the page. Below the parameters, the total number of units used to calculate the projected occupancy is shown. If the subproperty parameter is set to **All**, then total units is the total number of units at the property; otherwise, it is the total number of units at the selected subproperty.

Information appears in the following columns, from left to right on the page:

- **Week Ending:** The report bases the week ending dates on the day of the week the report starts and the current property date. If the property date is September 1 that falls on a Thursday, and if you selected Thursday as the day of the week to begin projecting occupancy for a four-week period, then the occupancy week begins on the following Thursday, September 8, and the report has four weekly rows that end on Wednesday 9/14, 9/21, 9/28, and 10/05.

- **# Occupied At Week Begin:** This is the total number of occupied units as of the week starting date.
- **% Occupied At Week Begin:** This is the percentage of occupied units for the week. Calculated as:

 # Occupied ÷ Total Units

- **Scheduled Move-Ins:** This is the total number of scheduled move-ins for the week. This number includes scheduled transfers.
- **Scheduled Move-Outs:** This is the total number of scheduled move-outs for the week. This number includes scheduled transfers.
- **Projected # Occupied At Week End:** This is the total number of units projected for occupancy on the week starting date. Calculated as:

 # Occupied + Scheduled Move-Ins - Scheduled Move-Outs

- **Projected % Occupied At Week End:** This is the percentage of units projected for occupancy on the week ending date. Calculated as:

Projected # Occupied ÷ Total Units

Reasons for Move Outs Report

Unified Platform ≡ Navigation Menu > Reports > Manage Reports > Residents/Management (Report Area) > Reasons for Move Outs

Use the *Reasons for Move Outs* report to analyze the reasons residents are moving out of your property for a given period. OneSite gives you two sources to gather data from: former residents and current residents who have given notice to move out or transfer.

The report looks at all move-outs that occurred or will occur during the period, and prints one detail row for each unique move-out category and reason given. It also calculates the percentage of residents that moved out because of a particular reason.

Reporting Evicted Residents

When giving a resident's move-out notice and selecting the **Forced Move (Eviction)** category from the **Category of Move-Out** drop-down list in the **Give Notice** pane, when you generate the *Reason for Move Outs* report, it lists the evicted residents who moved out during a specific period.

Reasons for Move Outs Options

Unified Platform ≡ Navigation Menu > Reports > Manage Reports > Residents/Management (Report Area) > Reasons for Move Outs

The *Reasons for Move Outs* report provides the following options used to select the information in the report and determine the report format.

Report Options

- **Generate Now:** To generate the report immediately, leave this option selected.
- **Schedule for Later:** To generate the report at a future date or time, select this option, and then perform the following:
    - Click the **Calendar** in the **Date** field, and then select the date you want to run the report.
    - Use the **Time** drop-down list to select the time when you want to generate the report. You can select any time of day in 30-minute increments.
- **Format:** Choose the report format. Available file types include:
    - **PDF:** To generate the report as a PDF file, select this option. Reports generated as PDF files appear on a new browser tab when completed.
    - **Word:** To generate the report as a DOC file, select this option. Reports generated in Word format automatically download when completed.

    - **Excel:** To generate the report as an XLS file, select this option. Reports generated as Excel files are downloaded to your device automatically when completed.
- **Select Property:** Use this drop-down list to select the properties. You can scroll through the list or type a few characters of the property name in the **Search** field to find and select properties. Click the **Clear** button in the **Search** field to type a new value. If you have access to only one property, the property is selected by default.
- **Send Email to External Recipient(s) upon Completion:** If you have the "External Report Distribution" right, you can type an email address in this field to send an email message to people outside of your organization. Use a semicolon to separate multiple email addresses. After the report is generated, an email message with a link to the report is sent.
- **Send Notification to Internal User(s) Upon Completion:** To send a notification to an internal user that the report is complete, use this drop-down list. You can select multiple users by selecting the check box beside each user you want to include.
- **Send File to Cloud Service upon Completion:** If you have the "External Report Distribution" right, you can use this drop-down list to select the cloud service account to which you want to send the report. After the report is generated, it is exported to the cloud service account's storage.

Parameters

- **Report Period Start Date:** Type the start date of the report period in this field, or click the **Calendar** to select the date..
- **Report Period End Date:** Type the end date of the report period in this field, or click the **Calendar** to select the date. All move-outs that occurred (or will occur) on or between the start and end dates are included in the report. If you selected former residents, the report includes reasons for former residents based on the move-out date. If you selected current residents, the report includes reasons for current residents based on the "Notice for" date.
- **Source:** Use the drop-down list to select **Former Residents** to report the reasons former residents moved out or transferred. Select **Residents On Notice** to report the reasons residents on notice to move out or transfer are moving out.

Reasons for Move Outs Columns

Unified Platform: Navigation Menu > Reports > Manage Reports > Last Run Date > View Report

This report prints one detail row for each leasing reason that was given by former resident who moved out or transferred or by current residents who gave notice to move out or transfer during the report period. Reasons are grouped by category, and then a count and a percentage of total move-outs are given. The selected report period dates are printed below the report title.

- **Category:** This is the move-out reason category.

- **Reason:** This is the reason that was selected when the resident moved out, transferred, or gave notice to vacate or transfer.
- **Number:** This is the number of households that selected this reason during the report period. The report also totals the number of households by move-out reason category.
- **Percentage:** This is the percentage of total move-outs that occurred for this reason during the report period.

Rent Roll Detail Report

Unified Platform ≡ Navigation Menu > Reports > Manage Reports > Residents/Management (Report Area) > Rent Roll Detail

The *Rent Roll Detail* report provides a snapshot of units as of a specified date. It shows a unit's floor plan, square footage, occupancy status, and market rent. Occupied units include the household name, move-in date, lease start date, and lease end date, and scheduled billing. The report also shows the deposit on hand for the household and the current open balance as of the report date.

Rent Roll Detail Options

Unified Platform ≡ Navigation Menu > Reports > Manage Reports > Residents/Management (Report Area) > Rent Roll Detail

The *Rent Roll Detail* report provides the following options used to select the information in the report and determine the report format.

Report Options

- **Generate Now:** To generate the report immediately, leave this option selected.
- **Schedule for Later:** To generate the report at a future date or time, select this option, and then perform the following:
  - Click the **Calendar** in the **Date** field, and then select the date you want to run the report.
  - Use the **Time** drop-down list to select the time when you want to generate the report. You can select any time of day in 30-minute increments.
- **Format:** Choose the report format. Available file types include:
  - **PDF:** To generate the report as a PDF file, select this option. Reports generated as PDF files appear on a new browser tab when completed.
  - **Word:** To generate the report as a DOC file, select this option. Reports generated in Word format automatically download when completed.
  - **Excel:** To generate the report as an XLS file, select this option. Reports generated as Excel files are downloaded to your device automatically when completed.
- **Select Property:** Use this drop-down list to select the properties. You can scroll through the list or type a few characters of the property name in the **Search** field to find and select properties. Click the × **Clear** button in the **Search** field to type a new value. If you have access to only one property, the property is selected by default.
- **Send Email to External Recipient(s) upon Completion:** If you have the "External Report Distribution" right, you can type an email address in this field to send an email message to

people outside of your organization. Use a semicolon to separate multiple email addresses. After the report is generated, an email message with a link to the report is sent.

- **Send Notification to Internal User(s) Upon Completion:** To send a notification to an internal user that the report is complete, use this drop-down list. You can select multiple users by selecting the check box beside each user you want to include.
- **Send File to Cloud Service upon Completion:** If you have the "External Report Distribution" right, you can use this drop-down list to select the cloud service account to which you want to send the report. After the report is generated, it is exported to the cloud service account's storage.

Parameters

- **Property Date:** Leave this option blank to capture rent roll information as of the current property date. To select a specific date, click the **Calendar**, and then select a date. If you select a previous date, certain information is not reported historically, such as canceled notices to vacate or transfer. For example, if you enter a notice to vacate for unit 222 on 10/1 and generate the report, the unit status is Occupied – NTV. If you cancel the notice on 10/4 and generate the report for 10/1, the unit status is Occupied, rather than Occupied – NTV. Amounts, however, are as of the date entered. The report shows historical amounts for such items as market rent, scheduled billings, other charges and credits, and deposits on hand.
- **Subproperty:** Use the drop-down list to filter units by a specific subproperty. To include all units, regardless of the subproperty, leave the default option "All subproperties" selected.
- **Subjournal:** Use the drop-down list to filter scheduled billing transactions by a specific subjournal. The report includes vacant and leased units that meet your criteria.
- **Report Type:** Use the drop-down list to select the report format:
  - **Details + Summary:** To include both detail and summary formats, leave this option selected.
  - **Details:** To include only unit detail information, select this option.
  - **Summary:** To include only statistical summaries in the report, select this option. Up to four summaries can appear in the report:
    - **Rent Analysis by Floor Plan:** This summary analyzes rent and occupancy by floor plan.
    - **Occupancy and Rents Summary:** This summary shows rent and potential rent by unit occupancy status.
    - **Summary Billing by Transaction Code Analysis:** The summary shows total scheduled billings by transaction code.
    - **Summary Billing by Subjournal Analysis:** This summary shows total scheduled billings by subjournal. It appears in the report if your property uses subjournals.
- **Unit Designation:** Use the drop-down list to select a unit designation type. The list shows types with an Active status on the **Unit Designations** page in setup. You assign a

designation to a unit on the **Add** or **Edit unit** page in setup. Only leases associated with the selected unit designation type are included in the report. To include all units, regardless of the designation type, leave "All" selected.

- **Display Unit Rent As:** Use the drop-down list to select the type of rent you want to report. You can choose from Market Rent, Market + Addl., or Effective Rent.
- **Exclude Former Residents That Have Open Deposit or Prepaid/Delinquent Balances:** Activate this switch to exclude former residents with open deposit or prepaid/delinquent balances in the report.
- **Hide All PII Date?:** Activate this switch to hide all PII (personally identifiable information) in the report, including the resident's name in the **Name** column.
- **Sort By:** Use the drop-down list to select how the report sorts information:
  - **Unit:** To sort information by unit number, leave this default selection.
  - **Floor plan:** To sort data by floor plan, select this option.
  - **Name:** To sort information by resident name, select this option.

Rent Roll Detail Columns

Unified Platform: ≡ Navigation Menu > Reports > Manage Reports > Last Run Date > View Report

For each unit, current lease information prints on the first row; additional rows print for applicants and former residents. Dates print in the mm/dd/yyyy or dd/mm/yyyy format depending on the country selected for the property in regional options settings.

- **Unit:** This is the building (if applicable) and unit number.
- **Floor Plan:** This is the floor plan code.
- **Unit Designation:** This is the unit designation type on the **Lease Information** page.
  - For residents on notice to vacate, this is the type associated with the lease at notice.
  - For former residents who gave notice before the move-out date, this is the type associated with the lease at notice.
  - For former residents who moved out without notice, this is the type associated with the lease on the move-out date.
- **SQFT:** This is the unit rentable square footage.
- **Unit/Lease Status:** This is the unit status as of the report date.
- **Name:** This is the head of household name.
- **Move-In/Move-Out:** This is the move-in or scheduled move-in date. The report prints both a move-in and move-out date for former residents and pending move-outs. For vacant units, this is blank.
- **Lease Start:** This is the lease start date.
- **Lease End:** This is the lease end date.

- **(Rent):** The column name is the rent type selected in the **Display Unit Rent As** option at report generation:
  - **Market Rent:** This is base rent plus amenity rent. Base rent is the total of CA-type transactions scheduled for the floor plan and unit. Amenity rent is the total of unit-priced amenities assigned to the unit.
  - **Market +Addl:** This is market rent plus the total of non-CA type transactions scheduled for the floor plan or unit, and the transactions are not grouped in the effective rent transaction code group.
  - **Market Effective Rent:** This is market rent plus non-CA charges and P-type credits scheduled for the floor plan or unit that are grouped in the effective rent transaction code group. Effective rent also accounts for any grouped concessions.
- **Subjournal:** This is the subjournal name (if applicable); otherwise, the system posts all billings to the default resident journal, and the report excludes this column.
- **Trans Code:** This lists each charge and credit in scheduled billing. For vacant units, this is blank.
- **Lease Rent:** This is the rent amount in scheduled billing. For vacant units, this is 0.00.

  Amounts associated with pending renewals, applicants, and former residents appear with an asterisk (*), and the report excludes them from totals.
- **Other Charges/Credits:** This is the amount of each non-rent charge and credit (non-CA types) in scheduled billing.

  Amounts associated with pending renewals, applicants, and former residents appear with an asterisk (*), and the report excludes them from totals.
- **Total Billing:** This is the total scheduled billing amount for the occupied unit. Calculated as:

  Lease Rent + Other Charges/Credits

  Amounts associated with pending renewals, applicants, and former residents appear with an asterisk (*), and the report excludes them from totals.
- **Dep on Hand:** This is total deposits the household has paid (includes pet, unit, and all other deposits).
- **Balance:** This is the resident's current ledger balance.
- **Totals:** This row sums each of the following columns:
  - **Rent:** This is total **Market**, **Market + Addl.**, or **Effective Rent**, based on the rent type reported.
  - **Lease Rent:** This is total lease rent for all occupied units. The total excludes amounts associated with pending renewals, applicants, and former residents.
  - **Other Charges/Credits:** This is total other charges and credits for all occupied units. The total excludes amounts associated with pending renewals, applicants, and former residents.

  - **Total Billing:** This is total billing for all occupied units, and it matches the totals reported in the *Summary Billing by Subjournal* and *Summary Billing by Transaction Code* sections. The total excludes amounts associated with pending renewals, applicants, and former residents.
  - **Dep on Hand:** This is total paid deposits.
  - **Balance:** This is the total open balance. The report totals this column if you included former residents (you selected "No" for the **Exclude formers?** parameter on the report's **Options** page). No total balance is calculated if you excluded former residents.

Rent Analysis by Floor Plan

- **Floor Plan:** This is the floor plan code.
- **# Units:** This is the total number of units in this floor plan.
- **Average SqFt:** This is average rentable square footage for all units in this floor plan. Since all units inherit rentable square footage from the floor plan, this is not a true average.
- **(Average Rent):** The column name is the rent type selected in the **Show Unit Rent As** option at report generation:
  - **Average Market Rent:** This is the average market rent for all units in this floor plan.
  - **Average Market + Addl.:** This is average market rent plus additional charges and credits (non-CA types) for this floor plan.
  - **Average Effective Rent**: This is average effective rent for all units in this floor plan.
- **(Rent) Amt/SqFt:** This is the average market, market + addl, or effective rent by square foot for the floor plan. Calculated as:

  Average Rent ÷ Average SqFt
- **Average Leased:** This is the average rent of leased units in this floor plan and is based on the CA-RENT charge in scheduled billing.
- **Leased Amt/SqFt:** This is the average rent of leased units by square foot for the floor plan. Calculated as:

  Average Leased ÷ Average SqFt
- **Units Occupied:** This is the total number of units occupied in the floor plan.
- **Occupancy %:** This is the occupancy rate for units of this floor plan. Calculated as:

  (Number of Units Occupied ÷ Total Number of Units) × 100
- **Units Available:** This is the total number of available units.

Occupancy and Rents Summary for Current Date

- **Unit Status:** This lists the occupancy statuses of units reported in the detail section of the report, such as Occupied no NTV, Occupied NTV, and Vacant Leased.
- **(Rent):** The column name is the rent type selected in the **Show Unit Rent As** option at report generation:
  - **Market Rent:** This is the total market rent for units with this occupancy status.

    - **Market + Addl.:** This is the total market rent plus additional charges and credits for units with this occupancy status.
    - **Effective Rent**: This is the total effective rent for units with this occupancy status.
- **# Units:** This is the total number of units with this occupancy status.
- **Potential Rent:** This is potential rent for units with this occupancy status:
    - For occupied units, this is total lease rent from scheduled billing for the occupancy status.
    - For vacant units, this is total market, market + addl., or effective rent in unit setup for the occupancy status.

Summary Billing by Subjournal for Current Date

This section prints if the property uses subjournals.

- **Subjournal:** This is the subjournal name.
- **Amount:** This is the total scheduled billing for this subjournal.
- **Total:** This row totals scheduled billing for all subjournals.

Summary Billing by Transaction Code for Current Date

- **Code:** This is the scheduled billing transaction code.
- **Amount:** This is the total scheduled billing amount for this transaction code.
- **Total:** This row totals scheduled billing as of the property date. The amount matches the **Total Billing** in the detail section.

Rent Roll Detail (Excel) Report

Unified Platform ≡ Navigation Menu > Reports > Manage Reports > Residents/Management (Report Area) > Rent Roll Detail (Excel)

The *Rent Roll Detail (Excel)* report is a comprehensive snapshot of units at your property as of a specified date. It lists resident billings and lease data, providing the same information as the standard *Rent Roll Detail* report, except in an Excel format, which makes it easy to sort and filter information.

Sheet 1 shows the detailed unit and lease information. For each unit, the floor plan, square footage, occupancy status, and market rent are reported. For occupied units, the report shows the head of household name, lease dates, deposits on hand, and the ledger balance as of the report date. It also lists resident scheduled billings by transaction code and the billing amount of each code. If a current resident has a *Renewed* status, the report displays information for both the current and renewal leases.

Sheet 2 shows average market and lease rents by floor plan. Sheet 3 calculates rent and potential rent by occupancy status, and summarizes billings by transaction code and subjournal.

Rent Roll Detail (Excel) Options

Unified Platform ≡ Navigation Menu > Reports > Manage Reports > Residents/Management (Report Area) > Rent Roll Detail (Excel)

The *Rent Roll Detail (Excel)* report provides the following options used to select the information in the report and determine the report format.

Report Options

- **Generate Now:** To generate the report immediately, leave this option selected.
- **Schedule for Later:** To generate the report at a future date or time, select this option, and then perform the following:
  - Click the **Calendar** in the **Date** field, and then select the date you want to run the report.
  - Use the **Time** drop-down list to select the time when you want to generate the report. You can select any time of day in 30-minute increments.
- **Format:** Choose the report format. Available file types include:
  - **Standard XML:** To generate the report as an XML file, select this option. See **Viewing Completed Reports or Extracts** for information on viewing an XML report.
  - **Excel:** To generate the report as an XLS file, select this option. Reports generated as Excel files are downloaded to your device automatically when completed.

- **Select Property:** Use this drop-down list to select the properties. You can scroll through the list or type a few characters of the property name in the **Search** field to find and select properties. Click the × **Clear** button in the **Search** field to type a new value. If you have access to only one property, the property is selected by default.
- **Send Email to External Recipient(s) upon Completion:** If you have the "External Report Distribution" right, you can type an email address in this field to send an email message to people outside of your organization. Use a semicolon to separate multiple email addresses. After the report is generated, an email message with a link to the report is sent.
- **Send Notification to Internal User(s) Upon Completion:** To send a notification to an internal user that the report is complete, use this drop-down list. You can select multiple users by selecting the check box beside each user you want to include.
- **Send File to Cloud Service upon Completion:** If you have the "External Report Distribution" right, you can use this drop-down list to select the cloud service account to which you want to send the report. After the report is generated, it is exported to the cloud service account's storage.

Parameters

- **Property Date:** Leave this option blank to capture rent roll information as of the current property date. To select a specific date, click the **Calendar**, and then select a date. If you select a previous date, certain information is not reported historically, such as canceled notices to vacate or transfer. For example, if you enter a notice to vacate for unit 222 on 10/1 and generate the report, the unit status is Occupied – NTV. If you cancel the notice on 10/4 and generate the report for 10/1, the unit status is Occupied, rather than Occupied – NTV. Amounts, however, are as of the date entered. The report shows historical amounts for such items as market rent, scheduled billings, other charges and credits, and deposits on hand.
- **Subproperty:** Use the drop-down list to filter units by a specific subproperty. To include all units, regardless of the subproperty, leave the default option "All subproperties" selected.
- **Subjournal:** Use the drop-down list to filter scheduled billing transactions by a specific subjournal. The report includes vacant and leased units that meet your criteria.
- **Report Type:** Use the drop-down list to select the report format:
  - **Details + Summary:** To include both detail and summary formats, leave this option selected.
  - **Details:** To include only unit detail information, select this option.
  - **Summary:** To include only statistical summaries in the report, select this option. Up to four summaries can appear in the report:
    - **Rent Analysis by Floor Plan:** This summary analyzes rent and occupancy by floor plan.
    - **Occupancy and Rents Summary:** This summary shows rent and potential rent by unit occupancy status.

- **Summary Billing by Transaction Code Analysis:** The summary shows total scheduled billings by transaction code.
- **Summary Billing by Subjournal Analysis:** This summary shows total scheduled billings by subjournal. It appears in the report if your property uses subjournals.

- **Unit Designation:** Use the drop-down list to select a unit designation type. The list shows types with an Active status on the **Unit Designations** page in setup. You assign a designation to a unit on the **Add** or **Edit unit** page in setup. Only leases associated with the selected unit designation type are included in the report. To include all units, regardless of the designation type, leave "All" selected.
- **Display Unit Rent As:** Use the drop-down list to select the type of rent you want to report. You can choose from Market Rent, Market + Addl., or Effective Rent.
- **Exclude Former Residents That Have Open Deposit or Prepaid/Delinquent Balances:** Activate this switch to exclude former residents with open deposit or prepaid/delinquent balances in the report.
- **Hide All PII Date?:** Activate this switch to hide all PII (personally identifiable information) in the report, including the resident's name in the **Name** column.
- **Sort By:** Use the drop-down list to select how the report sorts information:
  - **Unit:** To sort information by unit number, leave this default selection.
  - **Floor plan:** To sort data by floor plan, select this option.
  - **Name:** To sort information by resident name, select this option.

Rent Roll Detail (Excel) Columns

Unified Platform: ≡ Navigation Menu > Reports > Manage Reports > Last Run Date > View Report

For each unit, current lease information prints on the first row; additional rows print for applicants and former residents. Dates print in the mm/dd/yyyy or dd/mm/yyyy format depending on the country selected for the property in the regional options settings.

- **Resh ID:** This is the system-assigned resident ID.
- **Lease ID:** This is the system-assigned lease ID.
- **Bldg/Unit:** This is the building (if applicable) and unit number.
- **Floor Plan:** This is the floor plan code.
- **Unit Designation:** This is the unit designation type on the **Lease information** page.
  - For residents on notice to vacate, this is the type associated with the lease at notice.
  - For former residents who gave notice before the move-out date, this is the type associated with the lease at notice.
  - For former residents who moved out without notice, this is the type associated with the lease on the move-out date.

- **SqFt:** This is the unit rentable square footage.
- **Unit/Lease Status:** This is the unit status as of the report date.
- **Name:** This is the head of household name. This column is blank if you activated the **Hide All PII Data?** switch in the report parameters when you generated the report.
- **Move-In:** This is the move-in date for current residents and the scheduled move-in date for applicants. This column is blank for vacant units.
- **Move-Out:** This is the move-out date for former residents and the scheduled move-out date for pending move-outs.
- **Lease Start:** This is the lease start date.
- **Lease End:** This is the lease end date.
- **(Rent):** The column name is the rent type selected in the **Show unit rent as** option at report generation:
  - **Market Rent:** This is base rent plus amenity rent. Base rent is the total of CA-type transactions scheduled for the floor plan and unit. Amenity rent is the total of unit-priced amenities assigned to the unit.
  - **Market +Addl:** This is market rent plus the total of non-CA type transactions scheduled for the floor plan or unit, and the transactions are not grouped in the effective rent transaction code group.
  - **Effective Rent:** If the property uses transaction code groups in New OneSite and has an effective rent group in effect as of the report date, this amount is calculated as:

    [(Total Charges in Scheduled Billing in the Effective Rent Group × Number of Months in Lease Term)

    – (Concessions Posted in the Resident Ledger + Next Scheduled Concession)] ÷ Number of Months in Lease Term

    If no effective rent transaction code group is enabled or in effect, this is calculated as:

    [(Total CA-Type Charges in Scheduled Billing × Number of Months in Lease Term)

    – (Concessions Posted in the Resident Ledger + Next Scheduled Concession)] ÷ Number of Months in Lease Term

    The effective rent calculation applies to the *All Units* (PDF and Excel) and *Box Score* reports.
- **Subjournal:** This is the subjournal name (if applicable); otherwise, the system posts all billings to the default resident journal, and the report excludes this column.
- **Required Deposit:** This is the required unit deposit amount. The report considers only the required deposits that have the DEPOSIT transaction code.
- **Dep on Hand:** This is total paid deposits (includes pet, unit, and all other deposit receipts).
- **Balance:** This is the resident's current ledger balance.
- **Lease Rent:** This is the rent amount in scheduled billing. For vacant units, this is 0.00.

- **(Resident Billings):** A column appears for each charge and credit code in scheduled billing along with the corresponding amount.
- **Total Billing:** This is the resident's total scheduled billing. The report excludes asterisked amounts from totals.
- **Totals:** This row totals each numeric column.

Rent Analysis by Floor Plan

- **Floor Plan:** This is the floor plan code.
- **# Units:** This is the total number of units in this floor plan.
- **Average SqFt:** This is average rentable square footage for all units in this floor plan. Since all units inherit rentable square footage from the floor plan, this is not a true average.
- **(Average Rent):** The column name is the rent type selected in the **Show unit rent as** option at report generation:
  - **Average Market Rent:** This is the average market rent for all units in this floor plan.
  - **Average Market + Addl.:** This is average market rent plus additional charges and credits (non-CA types) for this floor plan.
  - **Average Effective Rent**: This is average effective rent for all units in this floor plan.
- **(Rent) Amt/SqFt:** This is the average market, market + addl, or effective rent by square foot for the floor plan. Calculated as:

  Average Rent ÷ Average SqFt
- **Average Leased:** This is the average rent of leased units in this floor plan and is based on the CA-RENT charge in scheduled billing.
- **Leased Amt/SqFt:** This is the average rent of leased units by square foot for the floor plan. Calculated as:

  Average Leased ÷ Average SqFt
- **Units Occupied:** This is the total number of units occupied in the floor plan.
- **Occupancy %:** This is the occupancy rate for units of this floor plan. Calculated as:

  (Number of Units Occupied ÷ Total Number of Units) × 100
- **Units Available:** This is the total number of available units.

Occupancy and Rents Summary for Current Date

- **Unit Status:** This lists the occupancy statuses of units reported in the detail section of the report, such as Occupied no NTV, Occupied NTV, and Vacant Leased.
- **(Rent):** The column name is the rent type selected in the **Show unit rent as** option at report generation:
  - **Market Rent:** This is the total market rent for units with this occupancy status.
  - **Market + Addl.:** This is the total market rent plus additional charges and credits for units with this occupancy status.

    - **Effective Rent**: This is the total effective rent for units with this occupancy status.
- **# Units:** This is the total number of units with this occupancy status.
- **Potential Rent:** This is potential rent for units with this occupancy status:
    - For occupied units, this is total lease rent from scheduled billing for the occupancy status.
- For vacant units, this is total market, market + addl., or effective rent in unit setup for the occupancy status.

Summary Billing by Transaction Code for Current Date

- **Code:** This is the scheduled billing transaction code.
- **Amount:** This is the total scheduled billing amount for this transaction code.
- **Total:** This row totals scheduled billing as of the property date. The amount matches the **Total Billing** in the detail section.

Rent Roll Detail Modified (Excel) Report

Unified Platform ≡ Navigation Menu > Reports > Manage Reports > Residents/Management (Report Area) > Rent Roll Detail Modified (Excel)

The *Rent Roll Detail Modified (Excel)* report is a comprehensive snapshot of scheduled billing as of a specified date. For each unit, the report lists market rent, lease dates, deposits on hand, and the current open balance as of the report date. The report also breaks out scheduled billing transactions by transaction code, so you can view what residents are paying for rent and other charges.

Excel Report Differences

The information below summarizes the differences between this report and the *Rent Roll Detail – Excel* report.

Rent Roll Detail Modified – Excel	Rent Roll Detail – Excel
• Shows information for vacant and leased units (current leases only)	• Also shows information for vacant and leased units, but includes applicant names, shows both current and renewed leases, and can include former leases, based on report parameters
• Detail only (no summaries)	• Detail and summaries
• Shows head of household name, email address, and phone number	• Shows head of household name only
• Occupied–NTV leases: Shows scheduled move-out date in the **Notice for date** column	• Occupied–NTV leases: Shows scheduled move-out date in the **Move-out Date** column (has no “notice for” column)
• Shows total paid deposits (any type)	• Shows total paid deposits (any type), and also the required unit deposit amount
• Shows up to 20 scheduled billing codes	• Can show more than 20 scheduled billing codes
• Total scheduled billings appear in **Total Charges** column	• Total scheduled billings appear in **Total Billing** column

Generate this (modified) Excel report when you want to view current lease information.

Rent Roll Detail Modified (Excel) Options

Unified Platform ≡ Navigation Menu > Reports > Manage Reports > Residents/Management (Report Area) > Rent Roll Detail Modified (Excel)

The *Rent Roll Detail Modified (Excel)* report provides the following options used to select the information in the report and determine the report format.

Report Options

- **Generate Now:** To generate the report immediately, leave this option selected.
- **Schedule for Later:** To generate the report at a future date or time, select this option, and then perform the following:
  - Click the **Calendar** in the **Date** field, and then select the date you want to run the report.
  - Use the **Time** drop-down list to select the time when you want to generate the report. You can select any time of day in 30-minute increments.
- **Format:** Choose the report format. Available file types include:
  - **Standard XML:** To generate the report as an XML file, select this option. See **Viewing Completed Reports or Extracts** for information on viewing an XML report.
  - **Excel:** To generate the report as an XLS file, select this option. Reports generated as Excel files are downloaded to your device automatically when completed.
- **Select Property:** Use this drop-down list to select the properties. You can scroll through the list or type a few characters of the property name in the **Search** field to find and select properties. Click the × **Clear** button in the **Search** field to type a new value. If you have access to only one property, the property is selected by default.
- **Send Email to External Recipient(s) upon Completion:** If you have the "External Report Distribution" right, you can type an email address in this field to send an email message to people outside of your organization. Use a semicolon to separate multiple email addresses. After the report is generated, an email message with a link to the report is sent.
- **Send Notification to Internal User(s) Upon Completion:** To send a notification to an internal user that the report is complete, use this drop-down list. You can select multiple users by selecting the check box beside each user you want to include.
- **Send File to Cloud Service upon Completion:** If you have the "External Report Distribution" right, you can use this drop-down list to select the cloud service account to which you want to send the report. After the report is generated, it is exported to the cloud service account's storage.

Parameters

- **Property Date:** Use the **Calendar** to select the report date. A unit's occupancy status and lease information is reported as of the report date. Deposits on hand reflect deposits paid through the fiscal period of the report date. For example, a deposit paid on January 17 is included in a resident's **Dep on hand** amount on a historical report generated as of January 1, if the fiscal period ends January 17 or later.

- **Subproperty:** Use the drop-down list to select units by a specific subproperty. To include all units, regardless of the subproperty, leave the default option "All subproperties" selected.
- **Subjournal:** Use the drop-down list to select a specific subjournal. To include scheduled billing transactions, regardless of the subjournal, leave "All" subjournals selected. Leased units that meet the subproperty, designation type, and subjournal criteria are reported. Additionally, vacant units that meet the subproperty and designation type criteria are reported.
- **Unit Designation:** Use the drop-down list to select a specific designation type. The drop-down list shows types with an Active status at the **Unit designations** page in setup. To include units, regardless of the designation type, leave "All" types selected. The report shows units that match the subproperty and unit designation type criteria.
- **Display Rent As:** Use the drop-down list to select the type of rent you want to report. Choices are **Market rent** and **Market + addl**.
- **Sort By:** Use the drop-down list to select an option that controls how the report sorts information.
    - **Unit:** To sort units by building and unit number, select this option.
    - **Floor plan:** To sort units by floor plan, select this option.
    - **Name:** To sort units by resident name, select this option. Vacant units appear first in the report, followed by leased units by the name of the head of household.

Rent Roll Detail Modified (Excel) Columns

Unified Platform: ≡ Navigation Menu > Reports > Manage Reports > Last Run Date > View Report

For each listed unit, the following information is printed in columns from left to right on the page.

- **Resh ID:** This is the resident identifier.
- **Lease ID:** This is the lease identifier.
- **Unit:** This is the building (if your property uses buildings) and unit number.
- **Floor Plan:** This is the floor plan code.
- **Unit Designation:** This is the unit designation type associated with the lease at a resident's **Lease information** page. For vacant units, this is the type associated with the unit in setup.
- **SqFt:** This is the unit rentable SqFt.
- **Unit/Lease Status:** This is the unit's occupancy or lease status:
    - Vacant
    - Vacant – Leased
    - Occupied

  - Occupied – NTV
- **Name:** This is the head of household name for leased units, or it is blank for vacant units.
- **Phone Number:** This is the head of household's phone number, or it is blank for vacant units.
- **Email:** This is the head of household's email address, or it is blank for vacant units.
- **Move-In:** This is the move-in date, or it is blank for vacant units.
- **Notice For Date:** This is the scheduled move-out date, if the resident has given notice to move out; otherwise, this is blank.
- **Move-Out:** This column is blank, since only current residents are reported.
- **Lease Start:** This is the lease start date.
- **Lease End:** This is the lease end date.
- **Market Rent:** This is current market rent for the unit. Market rent is base rent plus unit amenities. If the column heading is **Market + Addl.**, market rent includes additional charges and credits (non-CA types) assigned to the floor plan and/or unit on the **Change rent amounts** page in setup.
- **Dep on Hand:** This is total paid deposits through the fiscal period of the report date.
- **Balance:** This is the ledger balance as of the report date.
- **Total Charges:** This is the resident's total scheduled billing amount as of the report date. The calculation is:

  Total charges - Total credits
- **(Charges 1–20):** Up to 20 columns show the transaction codes of charges and credits in scheduled billing across the property. If the transaction is a charge, the amount is positive; if a credit, the amount is negative.

  For example, if the property has 10 types of charges and credits in scheduled billing, the charge codes appear as column headings in the first 10 columns; remaining columns are named Charge X, where "X" is a number from 11–20, and the transaction amounts are zero (0.00).
- **Total:** This row shows totals for each of the following columns:
  - **Market Rent** or **Market + Addl.**
  - **Dep on Hand**
  - **Total Charges**
  - **(Charges 1–20)**

Resident Activity Report

Unified Platform ≡ Navigation Menu > Reports > Manage Reports > Residents/Management (Report Area) > Resident Activity Report

The *Resident Activity* report shows selected leasing activities for a specified date range. You can include activities for notices to vacate, move-ins, move-outs, transfers, canceled/denied applicants, signed renewals, and pending residents who are scheduled to transfer during the period.

Resident Activity Options

Unified Platform ≡ Navigation Menu > Reports > Manage Reports > Residents/Management (Report Area) > Resident Activity

The *Resident Activity* report provides the following options used to select the information in the report and determine the report format.

Report Options

- **Generate Now:** To generate the report immediately, leave this option selected.
- **Schedule for Later:** To generate the report at a future date or time, select this option, and then perform the following:
  - Click the **Calendar** in the **Date** field, and then select the date you want to run the report.
  - Use the **Time** drop-down list to select the time when you want to generate the report. You can select any time of day in 30-minute increments.
- **Format:** Choose the report format. Available file types include:
  - **PDF:** To generate the report as a PDF file, select this option. Reports generated as PDF files appear on a new browser tab when completed.
  - **Word:** To generate the report as a DOC file, select this option. Reports generated in Word format automatically download when completed.
  - **Excel:** To generate the report as an XLS file, select this option. Reports generated as Excel files are downloaded to your device automatically when completed.
- **Select Property:** Use this drop-down list to select the properties. You can scroll through the list or type a few characters of the property name in the **Search** field to find and select properties. Click the × **Clear** button in the **Search** field to type a new value. If you have access to only one property, the property is selected by default.
- **Send Email to External Recipient(s) upon Completion:** If you have the “External Report Distribution” right, you can type an email address in this field to send an email message to people outside of your organization. Use a semicolon to separate multiple email addresses. After the report is generated, an email message with a link to the report is sent.

- **Send Notification to Internal User(s) Upon Completion:** To send a notification to an internal user that the report is complete, use this drop-down list. You can select multiple users by selecting the check box beside each user you want to include.
- **Send File to Cloud Service upon Completion:** If you have the "External Report Distribution" right, you can use this drop-down list to select the cloud service account to which you want to send the report. After the report is generated, it is exported to the cloud service account's storage.

Parameters

- **Start Date:** Click the **Calendar**, and then select the start date of the report period.
- **End Date:** Click the **Calendar**, and then select the end date of the report period. Resident activity that occurred on or between the start and end dates is included in the report.
- **Account Status:** This list allows you to select groups of residents or applicants by occupancy status or expiring leases. To report one or more of these groups, select the check box beside each item you want to include the item in the report. You can also select the **Select All** check box. The available groups are:
  - **Canceled/Denied:** This group includes applicants whose lease applications were canceled or denied during the report period.
  - **Expiring Leases:** This group includes residents that have leases expiring during the report period.
  - **Move-Ins:** This group includes residents whose move-in dates fall on or between the report dates.
  - **Move-Outs:** This group includes former residents whose move-out dates fall on or between the report dates.
  - **Notices to Vacate:** This group includes residents who have given notice to move out.
  - **Pending:** This group includes pending applications. These are applicants that are scheduled to move in, applicants on the waitlist, or residents who are scheduled to transfer during the period.
  - **Renewals Signed:** This group includes residents that renewed that have renewal lease signed dates that fall on or between the report date range, regardless of the lease expiration date.
  - **Transfers:** This group includes residents who transferred to other units during the report period.
- **Program:** Use the drop-down list to select the Affordable program you want to include in the report. **All** is selected by default. You can also choose from **50058**, **HUD**, **Rural Housing**, and **Tax Credit**.
- **Sort By:** To select the order in which the activities are listed within each section of the report, select one of these options.

- **Unit:** To list the activities by the combined building/unit number ID, leave this option selected.
- **Lease Signer:** To list the activities in alphabetical order based on the name of the head of household, select this option.
- **Date:** To list the activities according to the date on which the action occurred, select this option.

Resident Activity Columns

Unified Platform: ≡ Navigation Menu > Reports > Manage Reports > Last Run Date > View Report

The report groups leasing activities in separate sections by category.

Notices to Vacate

This section lists pending move-outs whose **Notice Given On** date falls within the reporting period.

- **Name:** This is the head of household name. If a double-dagger symbol ‡ appears next to the name, the notice is canceled.
- **Status:** This is the current resident.
- **Bldg/Unit:** This is the building and unit number that the resident is vacating.
- **Notice Given On:** This is the date the notice was given.
- **Notice Given For:** This is the scheduled move-out date. For canceled notices, the notice given for date appears for history purposes.
- **Reason for Move:** This is the move-out reason selected when notice was given.
- **Lease End Date:** This is the lease end date.
- **Skip/Break:** If your property uses the skip/break handling feature, as set in **Move-Out Settings**, this indicates whether the notice is a skip or break. If your property doesn't use this feature, this is blank.
- **Deposits on Hand:** This is the amount of paid deposits.
- **Ledger Balance:** This is the current resident ledger balance.

Transfers

This section lists each household that transferred to a different unit during the reporting period.

- **Name:** This is the head of household name.
- **Status:** This is the current resident.
- **Bldg/Unit:** This is the new building and unit number that after the resident transferred.
- **New Lease or Renewal:** This shows whether the transfer was processed as a new lease ("NL") or a renewed lease ("R").

- **Reason for Move:** This is the reason for the transfer that was selected in the **Transfer Request** process.
- **Days Occupied:** This shows the number of days the household has occupied the new unit.
- **From Bldg/Unit:** This is the building and unit after the resident transferred.
- **Transfered on Date:** This is the transfer date.
- **Original Move-In Date:** This is the original move-in date associated with this lease.
- **Deposits on Hand:** This is the open deposit amount on the resident's deposit ledger.
- **Ledger Balance:** This is the current open balance on the resident's ledger.

Move-Ins

This section lists each household that moved in to the property during the reporting period.

- **Name:** This is the head of household name.
- **Status:** This is the household status (*Current*, *Former*, or *Pending Resident*).
- **Bldg/Unit:** This is the building and unit number.
- **Lease Rent:** This is the current scheduled billing amount for rent (the total of all CA-type charges).
- **Other Recurring Charges:** This is the total amount of all non-rent charges in scheduled billing.
- **Other Recurring Credits:** This is the total amount of all credits in scheduled billing.
- **Ad Source:** This shows the advertising or traffic source that attracted the resident to your property. This is the value entered in the **How did you hear about us?** field on the resident's guest card.
- **Move-In Date:** This is the move-in date.
- **Lease End Date:** This is the lease end date.
- **Leasing Consultant:** This is the name of the OneSite user who entered the resident's original guest card.

Move-Outs

This section lists one detail row for each household that moved out during the reporting period.

- **Name:** This is the head of household name.
- **Status:** This is the household status (*Former Resident*).
- **Bldg/Unit:** This is the resident's former building and unit number.
- **Lease Fulfilled:** If the resident moved out before the end of the lease term, "Yes" appears in this column. If the resident did not terminate early, this is "No."
- **Reason for Move:** This shows the reason for moving that was selected at notice or move-out.
- **Days Occupied:** This shows the number of days the resident occupied the unit.
- **Move-Out Date:** This is the move-out date.

- **Lease End Date:** This is the lease end date.
- **Deposits on Hand:** This is the open deposit amount on the resident's deposit ledger.
- **Ledger Balance:** This is the current open balance on the resident's ledger.

Pendings

This section lists move-ins scheduled during the selected reporting period for the property. This includes applicants, waitlisted applicants, and pending transfers. Applicants do not have to be screened or approved for move-in to be included here.

- **Name:** This is the name of the applicant or pending transfer.
- **Date Applied:** This is the application date for the applicant or pending transfer.
- **Scheduled Move-In:** This is the requested move-in date or transfer date.

  For waitlisted applicants, the scheduled move-in date is blank. (Waitlists do not have a scheduled move-in date.)

- **Bldg/Unit:** For applicants or pending transfers, this is the building and unit number the household is assigned to.

  For waitlisted applicants, this is blank.

- **Lease Rent:** This is the total amount of current CA-type charges in scheduled billing for the applicant or pending transfer.
- **Other Recurring Charges:** This is the total amount of all current non-rent charges in scheduled billing for the applicant or pending transfer.
- **Other Recurring Credits:** This is the total amount of all current credits in scheduled billing for the applicant or pending transfer.
- **Ad Source:** This shows the marketing or traffic source that attracted the household to your property. This is the value entered in the **How did you hear about us?** field on the guest card.
- **Leasing Consultant:** This is the name of the person who entered the household's guest card.

Canceled/Denied

This section lists applications that were canceled or denied during the reporting period.

- **Name:** This is the head of household name.
- **Status:** This is the household status (*Former Applicant*).
- **Bldg/Unit:** This was the building and unit number selected by the applicant before the cancellation or rejection.
- **Canceled/Denied Date:** This is the date on which the application was canceled or denied.
- **Canceled/Denied Reason:** This is the reason the applicant canceled or was denied.
- **Leasing Consultant:** This is the name of the OneSite user who entered the applicant's guest card.

- **Deposits on Hand:** This is the open deposit amount on the applicant's deposit ledger.
- **Ledger Balance:** This is the current open balance on the applicant's ledger.

Leases Expiring

This section lists residents who have expiring leases during the reporting period.

- **Name:** This is the head of household name (last name, first name).
- **Bldg/Unit:** This is the building and unit number the resident currently occupies.
- **Original Move-In Date:** This is the original move-in date of the previous lease.
- **Lease Expiration Date:** This is the lease end date of the resident's most current lease.
- **Lease Rent:** This is the total amount of rent charges and charges grouped to rent in scheduled billing in effect as of the property date for the lease that is expiring.
- **Current Market Rent:** This is current market rent for the unit.
- **Other Recurring Charges:** This is the total amount of non-rent charges in scheduled billing in effect as of the property date for the lease that is expiring.
- **Other Recurring Credits:** This is the total amount of credits in scheduled billing in effect as of the property date for the lease that is expiring.
- **Renewal Start Date:** This is the start date of the renewal lease (if any). If the lease has not been renewed, this is blank.
- **Renewal Lease Rent:** This is the total amount of rent charges and charges grouped to rent in scheduled billing in effect as of the property date for the renewal lease.
- **Other Recurring Charges for Renewal:** This is the total amount of non-rent charges in scheduled billing in effect as of the property date for the renewal lease.
- **Other Recurring Credits for Renewal:** This is the total amount of credits in scheduled billing in effect as of the property date for the renewal lease.
- **Renewal Lease Term:** This is the lease term in number of months for the renewal lease.
- **Reason for Not Renewing (If Applicable, V3.0 Only):** If the person renewed on a month-to-month basis, this is the reason the person gave for not renewing.
- **Leasing Consultant:** This is the name of the OneSite user who renewed the lease. (The leasing consultant selected during the **Renew Now** process.)

Renewals Signed

For each renewal during the report period, this section shows data for the expiring lease and the renewal lease.

- **Name:** This is the head of household name (last name, first name).
- **Bldg/Unit:** This is the building and unit number the resident currently occupies.
- **Original Move-In Date:** This is the original move-in date of the previous lease.
- **Lease Expiration Date:** This is the lease end date of the resident's most current lease.
- **Lease Rent:** This is the total amount of rent charges and charges grouped to rent in scheduled billing in effect as of the property date for the lease that is expiring.

- **Current Market Rent:** This is current market rent for the unit.
- **Other Recurring Charges:** This is the total amount of non-rent charges in scheduled billing in effect as of the property date for the lease that is expiring.
- **Other Recurring Credits:** This is the total amount of credits in scheduled billing in effect as of the property date for the lease that is expiring.
- **Renewal Start Date:** This is the start date of the renewal lease.
- **Renewal Signed Date**: This is the lease signed date. This date recorded on the **Account History** tab on the **Activity** tab on the **Account Profile** page.
- **Renewal Lease Rent:** This is the total amount of rent charges and charges grouped to rent in scheduled billing in effect as of the property date for the renewal lease.
- **Other Recurring Charges for Renewal:** This is the total amount of non-rent charges in scheduled billing in effect as of the property date for the renewal lease.
- **Other Recurring Credits for Renewal:** This is the total amount of credits in scheduled billing in effect as of the property date for the renewal lease.
- **Renewal Lease Term:** This is the lease term in number of months for the renewal lease.
- **Leasing Consultant:** This is the name of the OneSite user who renewed the lease. (The leasing consultant selected during the **Renew now** process.)

(Totals)

- **Totals:** This row prints at the bottom of the report and shows the total number of notices to vacate, transfers, move-ins, move-outs, pending applications, canceled/denied applications, expiring leases, and/or renewal leases.

Resident Birthdays Report

Unified Platform ≡ Navigation Menu > Reports > Manage Reports > Residents/Management (Report Area) > Resident Birthdays

The *Resident Birthdays* report generates a list of residents whose birthdays fall during the same month. You determine the particular birthday month that is reported. You can also select "All" months to generate a list of birthdays for all residents.

Resident Birthdays Options

Unified Platform ≡ Navigation Menu > Reports > Manage Reports > Residents/Management (Report Area) > Resident Birthdays

The *Resident Birthdays* report provides the following options used to select the information in the report and determine the report format.

Report Options

- **Generate Now:** To generate the report immediately, leave this option selected.
- **Schedule for Later:** To generate the report at a future date or time, select this option, and then perform the following:
  - Click the **Calendar** in the **Date** field, and then select the date you want to run the report.
  - Use the **Time** drop-down list to select the time when you want to generate the report. You can select any time of day in 30-minute increments.
- **Format:** Choose the report format. Available file types include:
  - **PDF:** To generate the report as a PDF file, select this option. Reports generated as PDF files appear on a new browser tab when completed.
  - **Word:** To generate the report as a DOC file, select this option. Reports generated in Word format automatically download when completed.
  - **Excel:** To generate the report as an XLS file, select this option. Reports generated as Excel files are downloaded to your device automatically when completed.
- **Select Property:** Use this drop-down list to select the properties. You can scroll through the list or type a few characters of the property name in the **Search** field to find and select properties. Click the × **Clear** button in the **Search** field to type a new value. If you have access to only one property, the property is selected by default.
- **Send Email to External Recipient(s) upon Completion:** If you have the "External Report Distribution" right, you can type an email address in this field to send an email message to people outside of your organization. Use a semicolon to separate multiple email addresses. After the report is generated, an email message with a link to the report is sent.

- **Send Notification to Internal User(s) Upon Completion:** To send a notification to an internal user that the report is complete, use this drop-down list. You can select multiple users by selecting the check box beside each user you want to include.
- **Send File to Cloud Service upon Completion:** If you have the "External Report Distribution" right, you can use this drop-down list to select the cloud service account to which you want to send the report. After the report is generated, it is exported to the cloud service account's storage.

Parameters

- **Month:** Use the drop-down list to select a specific birthday month or "All" months.

Resident Birthdays Columns

Unified Platform: ≡ Navigation Menu > Reports > Manage Reports > Last Run Date > View Report

The company name, community name, report title, and the report date are listed at the top of the report. The report breaks by birthday month, with each resident listed in birthday order. For each resident listed, the following information is printed in columns from left to right on the page. The total number of birthdays reported is displayed at the end of the report.

- **Name:** This is the name of the resident whose birthday falls in the selected month.
- **Household Name:** This is the head of household name.
- **Gender:** This is the person's gender.
- **Unit:** This is the unit in which the person resides.
- **Birthday:** This is the person's birthday.
- **Move-In:** This is the resident's move-in date.
- **Home Phone:** This is the home phone number of the household.
- **Status:** This is the household's current residency status.
- **Email Address:** This is the email address recorded for the resident.

Resident Demographics Report

Unified Platform ≡ Navigation Menu > Reports > Manage Reports > Residents/Management (Report Area) > Resident Demographics

The *Resident Demographics* report lists the demographics entered on the **Add/Edit Household Member** page for current residents and applicants. You can access this information from the **People** tab on a household member's **Account Profile** page in new OneSite.

Resident Demographics Options

Unified Platform ≡ Navigation Menu > Reports > Manage Reports > Residents/Management (Report Area) > Resident Demographics

The *Resident Demographics* report provides the following options used to select the information in the report and determine the report format.

Report Options

- **Generate Now:** To generate the report immediately, leave this option selected.
- **Schedule for Later:** To generate the report at a future date or time, select this option, and then perform the following:
  - Click the **Calendar** in the **Date** field, and then select the date you want to run the report.
  - Use the **Time** drop-down list to select the time when you want to generate the report. You can select any time of day in 30-minute increments.
- **Format:** Choose the report format. Available file types include:
  - **PDF:** To generate the report as a PDF file, select this option. Reports generated as PDF files appear on a new browser tab when completed.
  - **Word:** To generate the report as a DOC file, select this option. Reports generated in Word format automatically download when completed.
  - **Excel:** To generate the report as an XLS file, select this option. Reports generated as Excel files are downloaded to your device automatically when completed.
- **Select Property:** Use this drop-down list to select the properties. You can scroll through the list or type a few characters of the property name in the **Search** field to find and select properties. Click the × **Clear** button in the **Search** field to type a new value. If you have access to only one property, the property is selected by default.
- **Send Email to External Recipient(s) upon Completion:** If you have the "External Report Distribution" right, you can type an email address in this field to send an email message to people outside of your organization. Use a semicolon to separate multiple email addresses. After the report is generated, an email message with a link to the report is sent.

- **Send Notification to Internal User(s) Upon Completion:** To send a notification to an internal user that the report is complete, use this drop-down list. You can select multiple users by selecting the check box beside each user you want to include.
- **Send File to Cloud Service upon Completion:** If you have the "External Report Distribution" right, you can use this drop-down list to select the cloud service account to which you want to send the report. After the report is generated, it is exported to the cloud service account's storage.

Parameters

- **Sort By:** Use the drop-down list to select whether the report will sort the residents by unit number, name, birth date, or employer.
- **Include Applicants:** Activate this switch to include applicants in the report. By default, the report provides demographic information only for current residents, including residents with a *Pending Transfer* or *Pending Renewal* status. Applicants have units assigned and are waiting to move in; the report excludes waitlisted applicants.

Resident Demographics Columns

Unified Platform: ≡ Navigation Menu > Reports > Manage Reports > Last Run Date > View Report

The following information is printed in columns from left to right on the page.

- **Unit:** This is the resident's unit number. If your property uses buildings, this column is **Bldg/Unit**, which lists the resident's building and unit numbers.
- **Floor Plan:** This is the floor plan code displayed in the Units list on the Items and Services.
- **Name/Phone:** This is the person's name and home telephone number.
- **Birth Date/Age:** This is the person's birth date and age.
- **Gender:** This is the person's gender:
  - **F:** Female
  - **I:** Intersex
  - **M:** Male
  - **N:** Non-Binary
  - **O:** Other
  - **T:** Transgender
  - **X:** Did Not Disclose
- **Marital Status:** This is the person's marital status.
- **Citizenship/Ethnic Origin:** This is the person's country of citizenship and ethnic origin.

The *Contact Level Details* custom report (on page 34) can show all of these demographics, including a person's race.

- **Resident Status:** This is the person's occupancy status, such as *Applicant* or *Current Resident*.
- **Household Status/Signer Status:** This is the person's household and signer status. The signer status shows whether the person is responsible for paying rent (such as a lease signer or cosigner) or just an occupant or employee.
- **Employer/Job Type:** This is the person's employer and job type.
- **Miles to Work:** This is the number of miles the person travels for work daily.
- **Income:** This is the person's estimated annual income provided in the **Estimated Annual Income** field in the **Employment** pane when editing the household member's information on the **People** tab on the resident's **Account Profile** page.

Resident Ledgers Report

Unified Platform ≡ Navigation Menu > Reports > Manage Reports > Residents/Management (Report Area) > Resident Ledgers

Use the *Resident Ledgers* report to print ledgers in bulk for selected accounts. You can filter the ledgers by date range, subjournal, account status and type, ledger type (accounting, deposits, or resident), and account name. For example, you might generate accounting ledgers for all current residents.

Resident Ledgers Options

Unified Platform ≡ Navigation Menu > Reports > Manage Reports > Residents/Management (Report Area) > Resident Ledgers

The *Resident Ledgers* report provides the following options used to select the information in the report and determine the report format.

Report Options

- **Generate Now:** To generate the report immediately, leave this option selected.
- **Schedule for Later:** To generate the report at a future date or time, select this option, and then perform the following:
  - Click the **Calendar** in the **Date** field, and then select the date you want to run the report.
  - Use the **Time** drop-down list to select the time when you want to generate the report. You can select any time of day in 30-minute increments.
- **Format:** Choose the report format. Available file types include:
  - **PDF:** To generate the report as a PDF file, select this option. Reports generated as PDF files appear on a new browser tab when completed.
  - **Word:** To generate the report as a DOC file, select this option. Reports generated in Word format automatically download when completed.
  - **Excel:** To generate the report as an XLS file, select this option. Reports generated as Excel files are downloaded to your device automatically when completed.
- **Select Property:** Use this drop-down list to select the properties. You can scroll through the list or type a few characters of the property name in the **Search** field to find and select properties. Click the × **Clear** button in the **Search** field to type a new value. If you have access to only one property, the property is selected by default.
- **Send Email to External Recipient(s) upon Completion:** If you have the “External Report Distribution” right, you can type an email address in this field to send an email message to people outside of your organization. Use a semicolon to separate multiple email addresses. After the report is generated, an email message with a link to the report is sent.

- **Send Notification to Internal User(s) Upon Completion:** To send a notification to an internal user that the report is complete, use this drop-down list. You can select multiple users by selecting the check box beside each user you want to include.
- **Send File to Cloud Service upon Completion:** If you have the “External Report Distribution” right, you can use this drop-down list to select the cloud service account to which you want to send the report. After the report is generated, it is exported to the cloud service account’s storage.

Parameters

- **Start Date:** Use the **Calendar** to select the start date for the date range for the report.
- **End Date:** Use the **Calendar** to select the end date for the date range for the report.

  The default through (or end) date is the current property date, but you can enter a future date to include any mid-month prorations posted at autobill. (The property must have enabled the **Allow proration at scheduled billing** setting on the **Resident management – General settings** page.)

  For example, assume a resident gives notice in June to move out on July 26. When you post scheduled billing on July 1, the system prorates the resident’s scheduled billings from 07/01–07/26 and prorates the move-out credits from 07/27–07/31. The report includes the future move-out credits if you generate it through 07/27. Renewals work similarly. Assume a resident’s renewal lease starts 07/05. The system prorates the current scheduled billings through the lease end date (07/01–07/04) and prorates the renewal billings from 07/05–07/31. The report includes the renewal billings if you generate it through 07/05.
- **Subjournal:** To filter the report by subjournal, select the journal from the drop-down list; otherwise, leave “All” selected.
- **Account Status:** This option allows you to filter the report by occupancy status.
  - **All:** Generates ledgers for current and former residents and applicants, or those whose first or last name matches the criteria that you specify below.
  - **Current resident:** Generates ledgers for all current residents, or those whose first or last name matches the criteria that you specify below. This status includes residents who currently live at your property and those that have given notice to move out. It excludes residents who have given notice to transfer.
  - **Formers whose FAS is not completed:** Generates ledgers for all former residents and former applicants whose final account statements have not been closed, or those whose first or last name matches the criteria that you specify below.
  - **Misc. account:** Generates ledgers for all miscellaneous income accounts, or those whose account name matches the criteria that you specify below.
  - **Pending Tenant:** Generates ledgers for all applicants, or those whose first or last name matches the criteria that you specify below. This status includes people that have been through the **Apply now** or **Waitlist** wizard that have not moved in.

  - **Previous Applicant:** Generates ledgers for all former applicants, or those whose first or last name matches the criteria that you specify below. These are people whose lease applications were canceled or denied in OneSite.
  - **Previous Tenant:** Generates ledgers for all former residents, or those whose name matches the criteria that you specify below. This status includes residents who have moved out and whose final account statements are closed.
  - **Waitlist:** Generates ledgers for all waitlisted applicants, or those whose first or last name matches the criteria that you specify below. This status includes people that have been through the **Waitlist** wizard that are waiting for a unit to become available.
- **Ledger type:** Select the type of ledger report you want to generate.
  - **Tenant:** Generates the *Resident Charges/Payments Ledger* that lists transactions posted during the report period, except for adjusting entries, for the selected households.
  - **Accounting:** Generates the *Accounting (Internal) Ledger* that lists transactions and adjusting entries posted during the report period for the selected households.
  - **Deposits:** Generates the *Resident Deposits Ledger* that lists deposit transactions posted during the report period for the selected households.

Account Holder: Use the drop-down list to select an account holder. Select ALL to generate ledgers for all households that have the selected resident status.

Resident Ledgers Columns

Unified Platform: ≡ Navigation Menu > Reports > Manage Reports > Last Run Date > View Report

(Header)

The report header has several sections that contain key information concerning the household. The information is the same, regardless of the ledger type. Information is presented in rows, rather than columns.

- *Personal Info*
  - **Name:** This is the resident's name.
  - **Bldg/Unit:** This is the resident's building and unit number.
  - **Status:** This is the status of the household.
  - **Contact Info:** This shows the resident's phone numbers.
  - **Email:** This is the person's email address.
- *Lease Info*
  - **Market rent:** This is base rent, plus floor plan amenities, plus any amenities that are specific to this unit. Market rent could differ from the scheduled rent for the current resident if any specials are in effect.

  - **Move-In:** This is the move-in date or the lease start date if the lease has been renewed.
  - **Lease Begin:** This is the lease start date.
  - **Lease End:** This is the lease expiration date.
  - **Move-Out:** This is the move-out date for a former resident.
  - **Notice Given:** This is the date notice was given by the household to move out or transfer to another unit. If no notice has been given, this is blank.
  - **Notice For:** If notice has been given, this is the date the household is going to move out or transfer.
- *Scheduled Billing*
  - **Lease Rent:** This is the current rent amount in scheduled billing for the resident. This includes only CA-type transactions in scheduled billing. It is the net amount of CA-type charges and CA-type credits. There may be other rentable items or concessions in scheduled billing that are in effect, but these items are not included in this amount.
  - **Other Charges:** This is the total amount of any additional scheduled monthly charges that apply to the resident.
  - **Other Credits:** This is the total of any credits also based on scheduled billing for the resident.
- *Ledger Info*
  - **Previous Balance:** This is the previous account balance for the resident.
  - **Charges:** This is the total amount of charges posted to the ledger during the report period. Each charge is listed in the *Ledger Detail* section of the report.
  - **Payments:** This is the total amount of payments posted to the ledger during the report period. Each payment is listed in the *Ledger Detail* section of the report.
  - **Credits:** This is the total amount of credits posted to the ledger during the report period. Each credit is listed in the *Ledger Detail* section of the report.
  - **Current Balance:** This is the current account balance for the resident.
  - **Deposits On Hand:** This is the current amount of deposits paid by the resident. If this is a former resident whose final account statement has not been processed, the total deposit amount is reported. Once the former resident’s account is closed, this is $0.00.
  - **Deposits Due:** This is the current outstanding deposit balance.

Resident Deposits Ledger Report Detail

This report shows deposit activity, including any deposit adjustments, such as corrections, reversals, and NSFs, posted during the report period.

- **Date:** This is the date the transaction was entered into the OneSite system.
- **Period:** This is the accounting period in effect when the transaction was entered into OneSite.

- **Bldg/Unit:** This is the building number (if your property uses buildings) and unit number of the resident.
- **Transaction Code:** This is the transaction category and code associated with this transaction.
- **Description:** This is the user-defined description that was entered when the transaction was posted or edited, or the default description for the transaction code, if no description was entered.
- **Journal:** This is the accounting journal in which the transaction was entered.
- **Document #:** This is the document number if the resident paid the deposit by check or money order.
- **Deposits In:** This is the amount received from the resident for this deposit transaction.
- **Deposits Out:** This is the deposit amount applied to charges due or refunded to a former resident whose account has been closed.
- **Balance:** This is the resident's balance after this transaction was posted.

Resident Charges/Payments Ledger Report Detail

This report lists payment and charge activity posted to the resident ledger during the report period. It excludes any adjustments. This report is usually printed for residents.

- **Date:** This is the date the transaction was entered into the OneSite system.
- **Period:** This is the accounting period in effect when the transaction was entered into OneSite.
- **Bldg/Unit:** This is the building number (if your property uses buildings) and unit number of the resident.
- **Transaction Code:** This is the transaction category and code associated with this transaction.
- **Description:** This is the user-defined description that was entered when the transaction was posted or edited, or the default description for the transaction code, if no description was entered.
- **Journal:** This is the accounting journal in which the transaction was entered.
- **Document #:** This is the document number if the resident made a payment by check or money order.
- **Charge:** If this is a charge, this is the transaction amount. Otherwise, this is blank.
- **Credit:** If this is a credit, this is the transaction amount. Otherwise, this is blank.
- **Balance:** This is the resident's balance after this transaction was posted.

Accounting (Internal) Ledger Report Detail

This report lists payment and charge activity posted to the resident ledger during the report period. It includes adjustments, such as gain/loss to lease, corrections, and reversals.

- **Date:** This is the date the transaction was entered into the OneSite system.
- **Period:** This is the accounting period in effect when the transaction was entered into OneSite.

- **Ctrl #:** If this is a payment transaction, this is the bank deposit number where the payment was included.
- **Bldg/Unit:** This is the building number (if your property uses buildings) and unit number of the resident.
- **Transaction Code:** This is the transaction category and code associated with this transaction.
- **Description:** This is the user-defined description that was entered when the transaction was posted or edited, or the default description for the transaction code, if no description was entered.
- **User:** This is the user name of the person who added or edited the transaction.
- **Source:** This lists the source through which the transaction was generated.

  Source codes include:

  - **A:** Autobill (posted through scheduled billing)
  - **B:** Bulk transactions (excludes beginning balance batches)
  - **C:** Change transactions (excludes NSF postings)
  - **D:** Deposit disposition
  - **E:** First of month proration
  - **F:** Pre-close and fiscal month-end
  - **G:** Import from a delimited file
  - **H:** Move prepaid to deposits ledger (FAS)
  - **I:** Beginning balances (deposits)
  - **J:** Closed FAS edits
  - **K:** Expense recovery
  - **L:** Move prepaid to deposits ledger
  - **M:** Manual transactions
  - **N:** NSF
  - **O:** Ocius
  - **P:** Prorate
  - **Q:** Quote process
  - **R:** Beginning balances (charges/payments)
  - **S:** System-applied (late fee, NSF check fee, gain/loss to lease adjustments)
  - **T:** Early termination and insufficient notice
  - **U:** Undo NSF
  - **V:** Final write-off – Collections
  - **W:** Write-off
  - **X:** External

    - **Y:** Velocity
    - **Z:** Payments
- **Journal:** This is the accounting journal in which the transaction was entered.
- **Document #:** This is the document number if the resident made a payment by check or money order.
- **Charge:** If this is a charge, this is the transaction amount. Otherwise, this is blank.
- **Credit:** If this is a credit, this is the transaction amount. Otherwise, this is blank.
- **Balance:** This is the resident’s balance after this transaction was posted.

CHAPTER 2

Military Reports

Military reports are available under the **Residents** reports area. You can generate and view the following reports:

- **Inventory and Occupancy:** (on page 164) This report reflects the expected number of units by bedroom count the military installation can expect to have after all construction, demolition, and remodeling are completed.
- **JLL:** (on page 167) This report produces a formatted Microsoft Excel worksheet for property personnel to complete monthly.
- **Occupancy Box Score:** (on page 183) This report provides box score statistics by parcel ID.
- **Occupancy by Rank:** (on page 189) This report provides occupancy percentages by military rank.
- **Occupancy by Unit Type:** (on page 192) This report totals the number of occupied units by unit bedroom size.
- **Occupancy PAM:** (on page 195) This report provides occupancy statistics by military rank, unit type, and resident designation.
- **Rent Roll Detail:** (on page 199) This report provides unit data and lease and scheduled billing information for current residents.
- **Subdivision Occupancy by Rank:** (on page 205) This report provides occupancy counts by subdivision and military rank.

In This Chapter

Inventory and Occupancy Report

Unified Platform ≡ Navigation Menu > Reports > Manage Reports > Residents/Military (Reports Area) > Inventory and Occupancy

This is a custom report. See Managing Custom HTML Reports for more information about configuring custom reports.

The *Inventory and Occupancy* report provides unit inventory information for two- to ten-bedroom-sized units. Units with the same number of bedrooms are totaled in the report, based on whether the units are occupied, down, or vacant and available. From this data, the report calculates the current unit inventory by bedroom size. End state inventory counts that are also reported are pulled from Unified Platform Settings and represent the number of units the military installation can expect to have after all construction, demolition, and remodeling are completed.

Before running the report, you will enter end state inventory counts and maintain down or offline units in Unified Platform Settings. This will allow the report to accurately calculate the percentage of occupied and online units, the percentage of occupied units of current inventory, and other data.

Inventory and Occupancy Options

Unified Platform ≡ Navigation Menu > Reports > Manage Reports > Residents/Military (Reports Area) > Inventory and Occupancy

The *Inventory and Occupancy* report provides the following options used to select the information in the report and determine the report format.

Report Options

- **Generate Now:** To generate the report immediately, leave this option selected.
- **Schedule for Later:** To generate the report at a future date or time, select this option, and then perform the following:
  - Click the **Calendar** in the **Date** field, and then select the date you want to run the report.
  - Use the **Time** drop-down list to select the time when you want to generate the report. You can select any time of day in 30-minute increments.
- **Format:** Choose the report format. Available file types include:
  - **Standard XML:** To generate the report as an XML file, select this option. See **Viewing Completed Reports or Extracts** for information on viewing an XML report.
  - **HTML Report:** To generate and view the report in HTML, select this option. See Viewing Completed Reports or Extracts for information on viewing an HTML report.

- **Excel Export:** To generate the report as an XLS file, select this option. Reports generated in Excel format automatically download when completed.
- **CSV Export:** To generate the report as a CSV file, select this option. Reports generated in CSV format automatically download when completed.

- **Select Property:** Use this drop-down list to select the properties. You can scroll through the list or type a few characters of the property name in the **Search** field to find and select properties. Click the ✕ **Clear** button in the **Search** field to type a new value. If you have access to only one property, the property is selected by default.
- **Send Email to External Recipient(s) upon Completion:** If you have the “External Report Distribution” right, you can type an email address in this field to send an email message to people outside of your organization. Use a semicolon to separate multiple email addresses. After the report is generated, an email message with a link to the report is sent.
- **Send Notification to Internal User(s) Upon Completion:** To send a notification to an internal user that the report is complete, use this drop-down list. You can select multiple users by selecting the check box beside each user you want to include.
- **Send File to Cloud Service upon Completion:** If you have the “External Report Distribution” right, you can use this drop-down list to select the cloud service account to which you want to send the report. After the report is generated, it is exported to the cloud service account’s storage.

This is a custom report. See Managing Custom HTML Reports for more information about configuring custom reports.

Inventory and Occupancy Columns

Unified Platform: ≡ Navigation Menu > Reports > Manage Reports > Last Run Date > View Report

Information appears in the following columns from left to right on the page. This assumes you included all available columns and sorted the columns in the order listed below.

Required Columns

- **Bedroom Size:** This is the number of bedrooms for units of this type. For example, 2Bd or 3Bd. Inventory counts are calculated for units with two to ten bedrooms.

Inventory and Occupancy

- **# Occupied:** This is the total number of occupied units for this bedroom size.
- **# Offline:** This is the total number of down units for this bedroom size.
- **# Online:** This is the total number of online units for this bedroom size. Calculated as:

  Total Number of Occupied Units + Vacant and Available Units
- **# Unleased > 30 Days:** This is the total number of units vacant for more than 30 days for this bedroom size.

- **# Vacant and Available:** This is the total number of vacant and available units for this bedroom size.
- **% Occupied of Inventory:** This is the percentage of occupied units in current inventory for this bedroom size. Calculated as:

  Total Number of Occupied Units ÷ Total Number of Units in the Current Inventory
- **% Occupied Online:** This is the percentage of occupied units that are online for this bedroom size:

  Total Number of Occupied units ÷ Total Number of Online Units
- **Current Inventory:** This is the total number of units for this bedroom size (offline + online).
- **End State Inventory:** This is the number of units the installation is expected to have after all construction, demolition, and remodeling is completed for units of this bedroom size.
- **Move-ins:** This is the total number of move-ins during the report period.
- **Move-outs:** This is the total number of move-outs during the report period.
- **Total Units:** This row provides property totals. Each of the columns is totaled, unless it is a percentage. Columns that have percentages are calculated using the applicable property totals.

JLL Report

Unified Platform ≡ Navigation Menu > Reports > Manage Reports > Residents/Military (Reports Area) > JLL

The *JLL* report produces a formatted Microsoft Excel worksheet for property personnel to complete monthly. It contains 9 sheets or tabs, and the individual report names are as follows:

- **Quarterly Occupancy Report by Unit Type**
- **Quarterly Offline Unit**
- **Quarterly Occupancy Report by Rank**
- **Other Eligible Tenant Detail**
- **Quarterly Leasing Activity Report**
- **In Service Report**
- **Quarterly Inquiry Report**
- **Quarterly Waitlist Report**
- **Quarterly Maintenance Survey Report**

James Lang LaSalle (JLL), Inc.

JLL, Inc. is a professional services and investment company specializing in real estate. One of its services is to help the United States military and Veterans Administration reduce and realign their installations. The company provides on-site administration to help installations reduce costs and enhance property values. The formatted reports generated through this option are provided by JLL.

This report requires that your property use the Central Data Storage (CDS) database.

JLL Options

Unified Platform ≡ Navigation Menu > Reports > Manage Reports > Residents/Military (Reports Area) > JLL

The *JLL* report provides the following options used to select the information in the report and determine the report format.

Report Options

- **Generate Now:** To generate the report immediately, leave this option selected.
- **Schedule for Later:** To generate the report at a future date or time, select this option, and then perform the following:
  - Click the **Calendar** in the **Date** field, and then select the date you want to run the report.
  - Use the **Time** drop-down list to select the time when you want to generate the report. You can select any time of day in 30-minute increments.

- **Format:** Choose the report format. Available file types include:
  - **Excel:** To generate the report as an XLS file, select this option. Reports generated as Excel files are downloaded to your device automatically when completed.
- **Select Property:** Use this drop-down list to select the properties. You can scroll through the list or type a few characters of the property name in the **Search** field to find and select properties. Click the **Clear** button in the **Search** field to type a new value. If you have access to only one property, the property is selected by default.
- **Send Email to External Recipient(s) upon Completion:** If you have the "External Report Distribution" right, you can type an email address in this field to send an email message to people outside of your organization. Use a semicolon to separate multiple email addresses. After the report is generated, an email message with a link to the report is sent.
- **Send Notification to Internal User(s) Upon Completion:** To send a notification to an internal user that the report is complete, use this drop-down list. You can select multiple users by selecting the check box beside each user you want to include.
- **Send File to Cloud Service upon Completion:** If you have the "External Report Distribution" right, you can use this drop-down list to select the cloud service account to which you want to send the report. After the report is generated, it is exported to the cloud service account's storage.

Parameters

- **Year:** Use the drop-down list to select the current calendar year in the format YYYY.
- **Quarter:** Use the drop-down list to select the current quarter for the report. This is "First quarter," "Second quarter," etc., based on the property date month.

JLL Columns

Unified Platform: ≡ Navigation Menu > Reports > Manage Reports > Last Run Date > View Report

This report contains 9 sheets or tabs, and the individual report names are as follows:

- **Sheet 1 (Quarterly Occupancy Report by Unit Type)** (on page 169)
- **Sheet 2 (Quarterly Offline Unit)** (on page 171)
- **Sheet 3 (Quarterly Occupancy Report by Rank)** (on page 172)
- **Sheet 4 (Other Eligible Tenant Detail)** (on page 174)
- **Sheet 5 (Quarterly Leasing Activity Report)** (on page 176)
- **Sheet 6 (In Service Report)** (on page 177)
- **Sheet 7 (Quarterly Inquiry Report)** (on page 179)
- **Sheet 8 (Quarterly Waitlist Report)** (on page 180)
- **Sheet 9 (Quarterly Maintenance Survey Report)** (on page 182)

Quarterly Occupancy by Unit Type Report

This report calculates monthly occupancy rates by unit (number of bedrooms and bathrooms) and construction type (New, As is, or Renovated). You set a unit's construction type on the **Add** or **Edit unit** page when you select the **Remodeled unit** or **Constructed unit** check box. Units that don't have either status are counted "As is."

The body of the report contains four sets of data, one for each month in the quarter and a quarterly average. The name of the month appears above the corresponding data. For example, if the quarter ends on 9/30, the report gives occupancy rates for July, August, and September.

The header portion of the report shows the report title, property name, and the "Period ending on x," where "x" is the last day of the quarter from **Report options**. Information appears in the following columns left to right on the page.

(Month 1)

- **Neighborhood:** This column contains the following descriptions:
  - Subtotal of 2 BR
  - Subtotal of 3 BR
  - Subtotal of 4 BR
  - Subtotal of 5 BR
  - Total
- **Construction:** This is the construction type which can be New, As is, or Renovated. These types appear above each subtotal row.
- **# BR:** This is the number of bedrooms.
- **# Baths:** This is the number of bathrooms.
- **Occupied Units:** This is the total number of occupied units on the last day of the month by unit and construction type. The total excludes units occupied by employees or the property owner, if the units are flagged unavailable and the reason is "Employee" or "Corporate" in unit setup.
- **Available Units:** This is the number of available units on the last day of the month by unit and construction type. On this report, a unit is considered available if it is able to be leased. That is, even if the unit is leased, it is considered available; therefore, available and vacant, occupied, and pre-leased units are included in this count.

  If you include down units and any that haven't been issued an acceptance notice through the Air Force Center for Engineering and the Environment (AFCEE) in the occupied totals, use Tab J1 to provide supplemental information.
- **Occupancy Rate:** This is the occupancy rate by construction type. The calculation is:

Occupied units ÷ Available units

The occupancy rate on the subtotal row is based on total **Occupied Units** and total **Available Units**.

(Months 2 and 3)

The same type of information is presented for months two and three.

Quarterly Average

The report calculates quarterly averages as follows:

- **Occupied Units:** This column shows average occupied units that are new, as is, or renovated by number of bedrooms. For example, if the number of occupied “New” two-bedroom units is 85, 83, and 74 during months 1–3, the New quarterly average for two-bedroom units is (85 + 83 + 74) ÷ 3 = 80.67. Separate averages are calculated for “As is” and “Renovated” units.
- **Available Units:** This column shows the average available units that are new, as is, or renovated by the number of bedrooms. For example, if the number of available “New” two-bedroom units is 90, 90, and 85 during months 1–3, the New quarterly average for two-bedroom units is (85 + 83 + 74) ÷ 3 = 80.67. Separate averages are calculated for “As is” and “Renovated” units.

This report requires that your property be using the Central Data Storage (CDS) database.

Quarterly Offline Unit Report

The *Quarterly Offline Unit* report is a listing of units that are unavailable as of the end of the quarter. A unit appears if its **Available** field is set to "No," the selected **Reason** is any reason except "Demolished," and the **Demolished unit** check box is cleared (not selected) in the *Military Housing* section of the **Add** or **Edit unit** page. Units that meet this criteria are considered down and therefore excluded in occupancy rate calculations.

This report is based on the Air Force Center for Engineering and the Environment (AFCEE) acceptance notice. Any units excluded on the notice should be flagged as unavailable in OneSite. If unavailable units were included in the totals on the *Quarterly Occupancy Report by Unit Type* report because of the way your accounting system tracks data, this report identifies the specific units that are unavailable and the reason.

The header portion of the report shows the report title, property name, and the "Period ending on x," where "x" is the last day of the quarter. Information appears in the following columns left to right on the page.

- **Unit:** This is the number of the down unit.
- **Address:** This is the unit address.
- **Pay Grades:** This is the rank band assigned to the floor plan, regardless of any override at the unit.
- **Market Rent:** This is unit market rent.
- **SqFt:** This is the unit rentable SqFt.
- **#Bdrms:** This is the number of bedrooms the unit has.
- **#Baths:** This is the number of bathrooms the unit has.
- **Down Status:** This is the reason selected on the **Add** or **Edit unit** page for this unit.

Quarterly Occupancy Report by Rank

This report shows the number of new leases during the quarter by military rank band and resident designation. The report also calculates quarterly averages.

The body of the report contains four sets of data, one for each month in the quarter and a quarterly average. The name of the month appears above the corresponding data. For example, if the quarter ends on 12/31, the report gives occupancy rates for October, November, and December. You can generate the report anytime during the quarter. Data is current as of the property date. To get data for the last month in the quarter, be sure to generate the report at the end of the quarter.

The header portion of the report shows the report title, company and property name, and “Period ending on” date (the last day of the current quarter).

(Month 1, 2, 3, or Quarterly Average)

The report gives statistics for target residents first, and then non-target residents. For the quarterly averages, the system totals the monthly amounts of each category and divides the total by three.

Target Residents (Active Duty)

A lease is included in this section if the head of household is an active duty service member, and the **Resident designation** field is set to “None” or blank on the resident’s **Lease information** page. Information appears in the following columns left to right on the page.

- **(Military Rank Band):** This section lists each military rank band your property uses and the ranks assigned to each band.
- **Occupied Units:** This is the total number of service members (head of household only) assigned to this military rank whose lease started during the given month.
- **Available Units:** This is blank for each military rank. If the unit is available, it is included in the available units total for the military rank band below.
- **Occupancy Rate:** This is blank for each military rank.
- **Total for (Military Rank Band):** For this rank band, this is the total number of occupied units, and the total number of available units during the month. The occupancy rate is:

  (Occupied Units/Available Units) * 100
- **Total for Target Residents (Active Duty):** This is the total of number of occupied units, available units, and the occupancy rate for all target residents. If the total number of available units is zero, the occupancy rate is 0%. Otherwise, the rate is:

  (Total Occupied Units/Total Available Units) * 100

Non-Target Residents (by Designation)

This section lists the designations your property has set up on the **Resident designations** page. A lease is included in this section if the **Resident designation** field is set to any designation except "None" or blank on the resident's **Lease information** page.

Information appears in the following columns left to right on the page.

- **(Resident Designation):** This column lists the resident designation name and these subcategories:
  - **No Rank:** A lease is included if the head of household is not an active duty service member, and the lease has a resident designation set to anything except "None" or blank.
  - **(Military Rank Band):** A lease is included if the head of household is an active duty service member whose military rank falls within the given rank band, and the lease has a resident designation set to anything except "None" or blank.
- **Occupied Units:** This is the total number of residents (head of household only) whose lease started this month for this resident designation and subcategory.
- **Available Units:** This is blank for each resident designation and subcategory.
- **Occupancy Rate:** This is blank for each resident designation and subcategory.
- **Total for (Resident Designation):** This is the total number of occupied units, available units, and the occupancy rate of non-target residents associated with this resident designation this month. The rate calculation is:

  (Occupied Units/Available Units) * 100
- **Total for Non-Target Residents:** This is the total of number of occupied units, available units, and the occupancy rate for all non-target residents. If the total number of available units is zero, the occupancy rate is 0%. Otherwise, the rate calculation is:

  (Total Occupied Units/Total Available Units) * 100
- **(Grand) Total:** This is the total number of occupied units (new leases) for target and non-target residents, the total number of available units for target and non-target residents, and the grand occupancy rate for the given month. If the total number of available units is zero, the occupancy rate is 0%. Otherwise, the rate calculation is:

  (Grand Total Occupied units/Grand Total Available units) * 100

Other Eligible Tenant Detail

This report shows non-target leases by resident designation and branch of service, based on data from the *Quarterly Occupancy by Rank* report. A non-target lease (on this report) has a head of household that may or may not be an active duty service member, and the resident designation is set to anything except “None,” “Active Duty,” or blank.

The report title, company and property name, and “Period ending on” date (the last day of the current quarter) appear in the header. Information appears in the following columns left to right on the page.

- **(Month):** This is the name of the first, second, or third month in the quarter.
- **Other Eligible Tenant (OET) Category:** This column lists resident designations associated with non-target leases that started during the particular month.
    - This category includes non-target leases included in the **Occupied Units** count on the *Quarterly Occupancy by Rank (Tab K)* report for the given resident designation and month.
    - This category excludes leases with a resident designation of “None, “Active Duty,” or blank since these leases are considered target (versus non-target) leases.
    - One row appears for each resident designation, rank band, and branch of service combination with leases that fit this criteria. For example, the Retired Civil Service/Officer/Coast Guard group includes leases designated as “Retired Civil Service” whose head of household serves in the Coast Guard and has a pay grade that falls in the “Officer” rank band. This group appears if the property has leases that fit this criteria and the leases started during the quarter.
- **Authorized/Assigned to Installation?:** This column is blank as this information is not captured in OneSite.
- **Key & Essential?:** Within each resident designation, rank band, and branch of service grouping, this is the number of leases whose head of household’s **Key & essential** check box is selected.
- **Pay Grade:** This is the rank band name. A non-target lease associated with the resident designation whose head of household has a pay grade that falls in this rank band and who serves in the given military branch of service is included in the occupied units count for the particular month.
- **Service:** This is the military branch of service. A non-target lease associated with the resident designation whose head of household serves in this branch of service and whose pay grade falls in the given rank band is included in the occupied units count for the particular month.
- This is the branch of service. Within each resident designation, rank band, and branch of service grouping, a non-target lease whose head of household services in this military branch is included in the occupied units count for the particular month.

- **Occupied Units:** This is the total number of leases that started during the month for this resident designation, rank band, and branch of service group. The total matches the total non-target occupied units count on the *Quarterly Occupancy by Rank (Tab K)* report for the particular resident designation and month.

  For example, assume this report has three rows for the Foreign Military resident designation in month one of the quarter. The first row has 10 leases for the Army and Officer rank band; the second row has seven for the Air Force and Officer rank band; the third row has eight for the Air Force and Enlisted rank band. The total of the designation then is 25 (10 + 7 + 8), which matches the total non-target occupied units on the "K" report for the Foreign Military designation and month.

- **(Monthly Total):** This row has no title and appears gray (shaded) below the last resident designation for the month. It totals each of the **Key & Essential** and **Occupied Units** columns.

Quarterly Leasing Activity Report

This report shows the total number of move-ins and move-outs per quarter by military rank and resident designation. The difference is net move-ins.

The header portion of the report shows the report title, property name, and the "Period ending on x," where "x" is the last day of the quarter for which you are entering data; this is the quarter named in **Report options**. Information appears in the following columns left to right on the page.

- **(Military Rank or Designation):** This is a military rank or an item from **Resident designations** in Military Housing setup. The report calculates total move-ins, move-outs, and net move-ins for military ranks E1–E9 and W1–10.

  For each resident designation, the report totals move-ins and move-outs by category:

  - **No rank**
  - **Enlisted**
  - **Officer**

  Total net move-ins is then calculated for each resident designation.
- **Move-ins:** This is the total number of move-ins during the quarter for this military rank or resident designation category (No rank, Enlisted, or Officer).
- **Move-outs:** This is the total number of move-outs during the quarter for this military rank or resident designation category (No rank, Enlisted, or Officer).
- **Net Move-ins:** This is the difference between move-ins and move-outs for this military rank or resident designation. The calculation is:

  Move-ins - Move-outs

  A negative number appears in parentheses.
- **(Grand) Total:** This row appears at the end of the report and shows total move-ins, move-outs, and net move-ins across all ranks and designations. If the amount is positive, more people moved in than moved out during the quarter; otherwise, move-outs exceeded move-ins.

In Service Report

This report shows the number of newly constructed or renovated units placed in service during the quarter and the number of demolished units removed from service. The *Military Housing* section of the **Add** or **Edit unit** page in OneSite is where you select a unit's service status (new construction, renovated, or demolished).

The header portion of the report shows the report title, property name, and the "Period ending on x," where "x" is the last day of the quarter named in **Report options**. Information appears in the following columns left to right on the page.

- **Date:** This is the start date of the current quarter or a date on which a unit's status changed.
  - For example, if this is the fourth quarter, the first date is October 1, and it shows the balance of in-service units at the start of the quarter.
  - Additional dates appear for each day with at least one unit status change. Similar units that had the same status change are counted on the same date if each of the following is true:
    - The change of status occurred on the same day.
    - The units have the same number of bedrooms and bathrooms.
    - The units are in the same neighborhood (subdivision).

  For example, if a unit was demolished and another renovated on the same day and both are in the same neighborhood, two data rows appear for the two status changes; each has the same date.
- **Construction:** This shows the following descriptions based on unit status changes as follows:
  - **Unit count:** This is the description of the first data row. It shows the total number of units initially placed in service for the property (the balance at the start of the quarter).
  - **Renovated:** This description appears if renovated units were placed in service on the given date. Specifically, the **Remodeled unit** check box was selected on the **Add** or **Edit unit** page.
  - **Demolished:** This description appears if units were removed from service on the given date. Specifically, the **Demolished unit** check box was selected on the **Add** or **Edit unit** page.
  - **New:** This description appears if new units were placed in service on the given date. Specifically, the **Constructed unit** check box was selected on the **Add** or **Edit unit** page.
- **# BR:** This is the number of bedrooms in the unit.
- **# Bath:** This is the number of bathrooms in the unit.
- **# Units Placed in Service:** This is the number of renovated or constructed units.
- **# Units Removed from Service:** This is the number of demolished units.

- **Units in Service - Neighborhood:** This is the subdivision name that had unit status changes during the quarter.
- **Units in Service - Total:** This is a total of renovated, constructed, or demolished units in a given neighborhood and date. The **Unit count** is the initial balance; thereafter, as unit status changes occur and units are placed in or removed from service, the total is increased or decreased.

Quarterly Inquiry Report

This report shows the total number of prospect guest cards and new service member records with an activity recorded during the quarter by traffic (or advertising) category and source. It includes guest cards created through Online Leasing and referrals from Enterprise Military Housing (eMH) when the respective integration is active.

The header portion of the report shows the report title, company and property name, and "Period ending on" date (the last day of the current quarter). Information appears in the following columns left to right on the page.

- **(Traffic/Advertising Category):** This is a traffic or advertising category selected on a prospect guest card or new service member record during the reporting period.
  - If the person was added through the **New prospect** wizard, this is the traffic category selected in the *How did you hear about us?* section of the guest card during the reporting period.
  - If the person was added through the **New service member** wizard, this is the advertising category selected on the **Additional information** page of the wizard during the reporting period.
  - Below each category, each related traffic or advertising source selected on a prospect guest card or new service member record appears.
- **Month 1:** This is the total number of guest cards and new service member records added during month 1 of the quarter for this traffic or advertising source. A guest card or service member record is counted if it has an activity during this month.
- **Month 2:** This is the total number of guest cards and new service member records added during month 2 of the quarter for this traffic or advertising source. A guest card or service member record is counted if it has an activity during this month.
- **Month 3:** This is the total number of guest cards and new service member records added during month 3 of the quarter for this traffic or advertising source. A guest card or service member record is counted if it has an activity during this month.
- **Total:** This is the total number of prospect guest cards and new service member records added during the quarter for this traffic or advertising category. Separate totals are given for each source. The grand total of traffic and advertising sources is the total shown for the category.

Quarterly Waitlist Report

This report shows the total number of waitlisted applicants for the quarter (as of the current property date). The waitlisted applicant's preferred floor plan must be associated with a floor plan group that matches a unit type (shown by number of bedrooms) on the report.

The header portion of the report shows the report title, property name, and the period end date (the last day of the quarter). The report gives statistics for target residents first and then non-target residents. Information appears in the following columns left to right on the page.

Target Residents (Active Duty)

A waitlisted applicant is included in this section if the head of household is an active duty service member and the **Resident designation** field is set to "None" or blank on the resident's **Lease information** page. Information appears in the following columns left to right on the page.

- **(Military Rank Band):** This section lists each military rank (or pay grade) by rank band.
- **(Unit Type):** This is **2**, **3**, **4**, or **5+ Bedrooms**, and each is shown in separate columns. The report totals the number of waitlisted applicants (head of household only) by military rank and unit type. A waitlisted applicant's preferred floor plan (selected on the **Change preferences** page) must be associated with a floor plan group that matches the particular bedroom count.
- **Total:** This is the total number of waitlisted applicants (head of household only) for this military rank. It is the sum of the **(Unit Type)** columns for the military rank.
- **(Total for Military Rank Band):** This row appears after the last military rank in the rank band. This is the total number of waitlisted applicants (head of household only) for all ranks in the band by unit type. A grand total for the rank band is also given.
- **Total for Target Residents (Active Duty):** This row appears after the last rank band total in this section. This is the total number of waitlisted applicants (head of household only) for all rank bands by unit type. A grand total for all target residents (active duty) is also given.

Non-Target Residents (by Designation)

This section lists the designations your property has set up on the **Resident designations** page. A waitlisted applicant (head of household only) is included in a total if the **Resident designation** field is set to any designation except "None" or blank on the resident's **Lease information** page. Information appears in the following columns left to right on the page.

- **(Resident Designation):** This column lists the resident designation name and these subcategories:
  - **No Rank:** A waitlisted applicant is included in a total for this subcategory if the head of household is not an active duty service member, and the lease has a resident designation set to anything except "None" or blank.

  - **(Military Rank Band):** A separate row appears for each rank band. A waitlisted applicant is included in a total for this subcategory if the head of household is an active duty service member whose military rank falls within the given rank band. Also, the lease has a resident designation set to anything except “None” or blank.
  - **(Total for Resident Designation):** This row sums the subcategories by unit type and gives a grand total by resident designation.
- **(Unit Type):** This is **2**, **3**, **4**, or **5+ Bedrooms**, and each is shown in separate columns. For each resident designation and subcategory, this is the total number of waitlisted applicants (head of household only) that prefer a particular unit type. A waitlisted applicant’s preferred floor plan (selected on the **Change preferences** page) must be associated with a floor plan group that matches the particular bedroom count.
- **Total:** This is the total number of waitlisted applicants (head of household only) by resident designation and subcategory. It is the sum of the **(Unit Type)** columns for the subcategory.
- **(Total for Resident Designation):** This row appears after the last rank band within a particular resident designation. For each subcategory, this is the total number of waitlisted applicants (head of household only) by unit type. A grand total for the resident designation is also given.
- **Total for Non-Target Residents:** This row appears after the last resident designation total. For all designations, this is the total number of waitlisted applicants (head of household only) by unit type. A grand total for all non-target residents is also given.
- **(Grand) Total:** This row appears below **Total for Non-Target Residents** and shows the total number of waitlisted applicants for all target and non-target residents by unit type. A grand total for waitlisted applicants is also given on the report.

Quarterly Maintenance Survey Report

Complete this report based on data from the maintenance survey. The header portion of the report shows the report title, property name, and the "Period ending on x," where "x" is the last day of the quarter that you are entering data for, based on **Report options**.

Information appears in the following columns left to right on the page.

Month 1

- **(Category):** This column has no heading and contains the following rows:
  - Overall Staff
  - Friendliness/Courtesy
  - Professionalism
  - Problem Solving Ability
  - Accessibility
  - Answering Service
- **Very Satisfied:** For each category, enter the number of people who is very satisfied.
- **Somewhat Satisfied:** For each category, enter the number of people who is somewhat satisfied.
- **Somewhat Dissatisfied:** For each category, enter the number of people who is somewhat dissatisfied.
- **Very Dissatisfied:** For each category, enter the number of people who is very dissatisfied.
- **Not Applicable:** For each category, enter the number of people who answered "N/A."
- **Total:** Enter the total of each row.
- **Total Tenant Survey Cards Received:** This row appears below the **(Category)** column. Enter the total number of survey cards received.

Months 2–3

Enter the same information as Month 1 above, except enter totals for months two and three.

Quarter

Enter the same information as Month 1 above, except enter quarterly totals, based on the data entered in months 1–3.

Occupancy Box Score Report

Unified Platform ≡ Navigation Menu > Reports > Manage Reports > Residents/Military (Reports Area) > Occupancy Box Score

This is a custom report. See Managing Custom HTML Reports for more information about configuring custom reports.

The *Occupancy Box Score* report provides occupancy percentages by parcel ID as of the current property date. The report breaks down occupancy percentages for each parcel by unit bedroom size, made ready/not made ready units, total available, total occupied units by military rank and parcel, and other statistics.

To use this report, you must have set up the parcel ID designation codes on the **Military Housing** page in RealPage Unified Platform and assigned each parcel to at least one unit.

To view unit occupancy for a specific period, generate the *Box Score* report available in the Residents/Management reporting area.

Occupancy Box Score Options

Unified Platform ≡ Navigation Menu > Reports > Manage Reports > Residents/Military (Reports Area) > Occupancy Box Score

The *Occupancy Box Score* report provides the following options used to select the information in the report and determine the report format.

Report Options

- **Generate Now:** To generate the report immediately, leave this option selected.
- **Schedule for Later:** To generate the report at a future date or time, select this option, and then perform the following:
  - Click the **Calendar** in the **Date** field, and then select the date you want to run the report.
  - Use the **Time** drop-down list to select the time when you want to generate the report. You can select any time of day in 30-minute increments.
- **Format:** Choose the report format. Available file types include:
  - **Standard XML:** To generate the report as an XML file, select this option. See **Viewing Completed Reports or Extracts** for information on viewing an XML report.
  - **HTML Report:** To generate and view the report in HTML, select this option. See Viewing Completed Reports or Extracts for information on viewing an HTML report.
  - **Excel Export:** To generate the report as an XLS file, select this option. Reports generated in Excel format automatically download when completed.

    - **CSV Export:** To generate the report as a CSV file, select this option. Reports generated in CSV format automatically download when completed.
- **Select Property:** Use this drop-down list to select the properties. You can scroll through the list or type a few characters of the property name in the **Search** field to find and select properties. Click the × **Clear** button in the **Search** field to type a new value. If you have access to only one property, the property is selected by default.
- **Send Email to External Recipient(s) upon Completion:** If you have the "External Report Distribution" right, you can type an email address in this field to send an email message to people outside of your organization. Use a semicolon to separate multiple email addresses. After the report is generated, an email message with a link to the report is sent.
- **Send Notification to Internal User(s) Upon Completion:** To send a notification to an internal user that the report is complete, use this drop-down list. You can select multiple users by selecting the check box beside each user you want to include.
- **Send File to Cloud Service upon Completion:** If you have the "External Report Distribution" right, you can use this drop-down list to select the cloud service account to which you want to send the report. After the report is generated, it is exported to the cloud service account's storage.

This is a custom report. See Managing Custom HTML Reports for more information about configuring custom reports.

Occupancy Box Score Columns

Unified Platform: ≡ Navigation Menu > Reports > Manage Reports > Last Run Date > View Report

Information appears in the following columns from left to right on the page. This assumes you selected all columns from the **Occupancy Box Score** folder in the **Available Columns** list on the report's **Parameters** page, and you didn't sort the columns. (The columns are listed alphabetically by default.)

To present data based on its location in OneSite (which creates a better report), you should save this report in a group and sort the columns in the recommended order. Refer to **Recommended Sort Order of Columns** for more information.

Required Column

- **Parcel:** This is the parcel ID assigned to the unit. (You must have defined the parcel ID designation on the **Military Housing** page in Unified Platform Settings and assigned them to units to get data in this column.)

Occupancy Box Score Columns (in Alphabetical Order)

- **% Occupancy:** This is the occupancy percentage for this parcel:

Total occupied ÷ Total available

- **2 BR Occupied:** This is the number of two-bedroom units that are occupied for this parcel.
- **2 BR Vacant:** This is the number of two-bedroom units that are vacant for this parcel.
- **3 BR Occupied:** This is the number of three-bedroom units that are occupied for this parcel.
- **3 BR Vacant:** This is the number of three-bedroom units that are vacant for this parcel.
- **4 BR Occupied:** This is the number of four-bedroom units that are occupied for this parcel.
- **4 BR Vacant:** This is the number of four-bedroom units that are vacant for this parcel.
- **A/F Occ(upied):** This is the total number of residents, including the head of household, spouses, and dependents, in the Air Force for this parcel.
- **Army Occ(upied):** This is the total number of residents, including the head of household, spouses, and dependents, in the Army for this parcel.
- **City:** This is the city where the parcel is located.
- **COMS:** This is the number of units with a *Vacant – Not Ready* status for this parcel.
- **Down Units:** This is the number of down units for this parcel.
- **E1:** This is the number of units whose head of household is an E1-ranked service member for this parcel.
- **E2:** This is the number of units whose head of household is an E2-ranked service member for this parcel.
- **E3:** This is the number of units whose head of household is an E3-ranked service member for this parcel.
- **E4:** This is the number of units whose head of household is an E4-ranked service member for this parcel.
- **E5:** This is the number of units whose head of household is an E5-ranked service member for this parcel.
- **E6:** This is the number of units whose head of household is an E6-ranked service member for this parcel.
- **E7:** This is the number of units whose head of household is an E7-ranked service member for this parcel.
- **E8:** This is the number of units whose head of household is an E8-ranked service member for this parcel.
- **E9:** This is the number of units whose head of household is an E9-ranked service member for this parcel.
- **Employee:** This is the number of occupants that are employees. To get a count, you must have added **Employee** as a designation in the *Resident Designation* section on the **Military Housing** page in Unified Platform Settings, and then selected **Employee** as the resident designation for the household on the **Residents** page in Unified Platform Settings.
- **Initial Units:** This is the number of units the military conveyed for development for this parcel. The units conveyed number was entered for the specific parcel in the *Parcel ID Designations* section on the **Military Housing** page in Unified Platform Settings.

- **Notes:** This is any parcel notes added to the parcel.
- **O1:** This is the number of units whose head of household is either an O1 or O1E-ranked service member for this parcel.
- **O2:** This is the number of units whose head of household is either an O2 or O2E-ranked service member for this parcel.
- **O3:** This is the number of units whose head of household is either an O3 or O3E-ranked service member for this parcel.
- **O4:** This is the number of units whose head of household is an O4-ranked service member for this parcel.
- **O5:** This is the number of units whose head of household is an O5-ranked service member for this parcel.
- **O6:** This is the number of units whose head of household is an O6-ranked service member for this parcel.
- **O7+:** This is the number of units whose head of household is a service member ranked O7 or higher for this parcel.
- **Other:** This is the number of units whose head of household is a civilian (non-military) for this parcel.
- **Other Occ(upied):** This is the total number of non-military occupants.
- **Ready Units:** This is the number of vacant units that are made ready for this parcel.
- **Total Available:** This is the total number of available units assigned to this parcel. Calculated as:

  Total Occupied Units + Total Vacant Units
- **Total Occ:** This is the total number of occupants for this parcel. Occupants can include the head of household, spouses, dependents, and so on. This is the total number of contacts that are residents that occupy a unit assigned to this parcel.
- **Total Occupied:** This is the total number of occupied units for this parcel:

  Total Available – Total Vacant
- **Total Units:** This is the total number of units for this parcel. Calculated as:

  Initial Units – Units Demolished/Removed + Units Constructed
- **Total Vacant:** This is the total number of vacant (and available) units for this parcel:

  Total Available – Total Occupied
- **Units Constructed:** This is the total number of units flagged as **Constructed Unit** for this parcel, plus the total number of new units constructed at OneSite conversion.
- **Units Demolished/Removed:** This is total demolished units for this parcel ID. The total includes demolished units associated with the parcel ID, and units demolished at OneSite conversion (as defined for the parcel ID in the *Parcel ID Designations* section on the **Military Housing** page in Unified Platform Settings).
- **UPH Occ(upied):** This is the total number of unaccompanied personnel housing (UPH) occupants.

- **User-Defined (Parcel Attribute):** This is the user-defined parcel information.
- **Vacant? New Construction:** This is the number of vacant new construction units that have never been occupied for this parcel.
- **W1:** This is the number of units whose head of household is a W1-ranked service member for this parcel.
- **W2:** This is the number of units whose head of household is a W2-ranked service member for this parcel.
- **W3:** This is the number of units whose head of household is a W3-ranked service member for this parcel.
- **W4:** This is the number of units whose head of household is a W4-ranked service member for this parcel.
- **W5:** This is the number of units whose head of household is a W5-ranked service member for this parcel.

Recommended Sort Order of Columns

To create a more cohesive report, sort the columns as listed below.

The following column is required, and it should be listed first in the report:

- **Parcel**

The report pulls the following information from the *Parcel ID Designations* section on the **Military Housing** page in Unified Platform Settings:

- **Notes**
- **Initial Units**
- **Units Demolished/Removed**
- **Units Constructed**
- **Total Units**
- **User-Defined (Parcel Attribute)**

The report pulls the following information from the **Create New (Unit)** or **Edit (Unit)** panes in Unified Platform Settings:

- **Down Units**
- **Total Available**
- **Total Vacant**
- **Total Occupied**
- **% Occupancy**
- **2 BR Occupied**
- **2 BR Vacant**
- **3 BR Occupied**

- **3 BR Vacant**
- **4 BR Occupied**
- **4 BR Vacant**
- **COMS**
- **Ready Units**
- **City**

Occupancy by rank – The report totals current residents by rank, based on information from the **Military Housing** page in Unified Platform Settings:

- **E1 – E9**
- **O1 – O7+**
- **W1 – W5**
- **Other**

Occupancy by population count – The report breaks down occupancy counts by military branch and other categories:

- **Total Occ(upied)**
- **A/F Occ(upied)**
- **Army Occ(upied)**
- **UPH Occ(upied)**
- **Vacant New Construction**
- **Employee**
- **Other Occ(upied)**

Occupancy by Rank Report

Unified Platform ≡ Navigation Menu > Reports > Manage Reports > Residents/Military (Reports Area) > Occupancy by Rank

This is a custom report. See Managing Custom HTML Reports for more information about configuring custom reports.

The *Occupancy by Rank* report shows occupancy by military rank, and calculates the percentage (above or below) the targeted occupancy. Target occupancy counts are defined in the partnership agreement between the military and your company. The report also provides occupancy counts for non-military families.

To verify the occupancy counts or to determine the units in which service members of a particular rank live, generate the *Rent Roll Detail (on page 199)* report and sort data by pay grade.

Occupancy by Rank Options

Unified Platform ≡ Navigation Menu > Reports > Manage Reports > Residents/Military (Reports Area) > Occupancy by Rank

The *Occupancy by Rank* report provides the following options used to select the information in the report and determine the report format.

Report Options

- **Generate Now:** To generate the report immediately, leave this option selected.
- **Schedule for Later:** To generate the report at a future date or time, select this option, and then perform the following:
  - Click the **Calendar** in the **Date** field, and then select the date you want to run the report.
  - Use the **Time** drop-down list to select the time when you want to generate the report. You can select any time of day in 30-minute increments.
- **Format:** Choose the report format. Available file types include:
  - **Standard XML:** To generate the report as an XML file, select this option. See **Viewing Completed Reports or Extracts** for information on viewing an XML report.
  - **HTML Report:** To generate and view the report in HTML, select this option. See Viewing Completed Reports or Extracts for information on viewing an HTML report.
  - **Excel Export:** To generate the report as an XLS file, select this option. Reports generated in Excel format automatically download when completed.
  - **CSV Export:** To generate the report as a CSV file, select this option. Reports generated in CSV format automatically download when completed.

- **Select Property:** Use this drop-down list to select the properties. You can scroll through the list or type a few characters of the property name in the **Search** field to find and select properties. Click the **Clear** button in the **Search** field to type a new value. If you have access to only one property, the property is selected by default.
- **Send Email to External Recipient(s) upon Completion:** If you have the “External Report Distribution” right, you can type an email address in this field to send an email message to people outside of your organization. Use a semicolon to separate multiple email addresses. After the report is generated, an email message with a link to the report is sent.
- **Send Notification to Internal User(s) Upon Completion:** To send a notification to an internal user that the report is complete, use this drop-down list. You can select multiple users by selecting the check box beside each user you want to include.
- **Send File to Cloud Service upon Completion:** If you have the “External Report Distribution” right, you can use this drop-down list to select the cloud service account to which you want to send the report. After the report is generated, it is exported to the cloud service account’s storage.

This is a custom report. See Managing Custom HTML Reports for more information about configuring custom reports.

Occupancy by Rank Columns

Unified Platform: ≡ Navigation Menu > Reports > Manage Reports > Last Run Date > View Report

Information appears in the following columns from left to right on the page. This assumes you included all available columns and sorted the columns in the listed order.

Required Columns

- **Rank:** This is the military rank (or pay grade) or N/A (for non-military families). The report is hard-coded to show common ranks for all military branches:
  - **E1–E9:** Ranks E1 through E9 represent junior enlistments.
  - **W1–W5:** Ranks W1 through W5 represent warrant officers.
  - **O1–O10:** Ranks O1 through O10 represent officers.
  - **Military Families:** The report totals occupancy for all ranks under this category.
  - **N/A:** The report totals occupancy of all non-military leases under this category. A non-military lease means no service member lives in the unit.

Occupancy Report by Rank

- **Occupancy:** This is the number of service members (head of household only) by rank that are living in military housing at the property. For non-military families, this is the number of civilians (head of household only) living at the property.

- **Target Mix:** This is the projected number of military families by rank that will live in military housing at the property. (The head of household will be a service member in this rank.) This number is determined as part of the partnership agreement with the military and does not change. (The counts are defined in the *Target Occupancy by Rank* section on the **Privatized Military** page in Unified Platform Settings.)
  - The target occupancy for rank O1 includes services members in ranks O1 and O1E.
  - The target occupancy for rank O2 includes services members in ranks O2 and O2E.
  - The target occupancy for rank O3 includes services members in ranks O3 and O3E.
  - The target occupancy for senior officers is a single value for all ranks of O7 and above.

  For non-military families, there is no target count.
- **Variance %:** This is the percentage (plus or minus) for which the target occupancy goal is/is not met for the given rank. Calculated as:

  ((Occupancy – Target Mix) ÷ Target Mix) × 100
- **Waitlist:** This is the number of service members by rank (head of household only) currently on the waitlist.
- **(Total Military Families):** This row totals the occupancy, target mix, and waitlist counts for all ranks, and calculates the total variance %.
- **(Total N/A):** This is the total of non-military families that live at the property.
- **Total:** This is total occupancy. Calculated as:

  Total Military Families + Total N/A
- **Total Military Families over Target Mix:** This is the total percentage of military families over the target mix. Calculated as:

  (Total Occupancy of Military Families) ÷ Total Target Mix) × 100
- **Total Military and Non-Military Families Over Target Mix:** This is the total occupancy percentage over the target mix: Calculated as:

  (Total Occupancy of Military and Non-Military Families ÷ Total Target Mix) × 100

Occupancy by Unit Type Report

Unified Platform ≡ Navigation Menu > Reports > Manage Reports > Residents/Military (Reports Area) > Occupancy by Unit Type

This is a custom report. See Managing Custom HTML Reports for more information about configuring custom reports.

The *Occupancy by Unit Type* report shows the total number of occupied units by unit bedroom size. Additionally, it calculates the total number of units in the inventory for each bedroom size, the percentage of occupied units in the current inventory, plus other statistics. To determine the specific units that are occupied, generate the *Rent Roll Detail* (on page 199) report in conjunction with this report.

Occupancy by Unit Type Options

Unified Platform ≡ Navigation Menu > Reports > Manage Reports > Residents/Military (Reports Area) > Occupancy by Unit Type

The *Occupancy by Unit Type* report provides the following options used to select the information in the report and determine the report format.

Report Options

- **Generate Now:** To generate the report immediately, leave this option selected.
- **Schedule for Later:** To generate the report at a future date or time, select this option, and then perform the following:
  - Click the **Calendar** in the **Date** field, and then select the date you want to run the report.
  - Use the **Time** drop-down list to select the time when you want to generate the report. You can select any time of day in 30-minute increments.
- **Format:** Choose the report format. Available file types include:
  - **Standard XML:** To generate the report as an XML file, select this option. See **Viewing Completed Reports or Extracts** for information on viewing an XML report.
  - **HTML Report:** To generate and view the report in HTML, select this option. See Viewing Completed Reports or Extracts for information on viewing an HTML report.
  - **Excel Export:** To generate the report as an XLS file, select this option. Reports generated in Excel format automatically download when completed.
  - **CSV Export:** To generate the report as a CSV file, select this option. Reports generated in CSV format automatically download when completed.
- **Select Property:** Use this drop-down list to select the properties. You can scroll through the list or type a few characters of the property name in the **Search** field to find and select

properties. Click the × **Clear** button in the **Search** field to type a new value. If you have access to only one property, the property is selected by default.

- **Send Email to External Recipient(s) upon Completion:** If you have the "External Report Distribution" right, you can type an email address in this field to send an email message to people outside of your organization. Use a semicolon to separate multiple email addresses. After the report is generated, an email message with a link to the report is sent.
- **Send Notification to Internal User(s) Upon Completion:** To send a notification to an internal user that the report is complete, use this drop-down list. You can select multiple users by selecting the check box beside each user you want to include.
- **Send File to Cloud Service upon Completion:** If you have the "External Report Distribution" right, you can use this drop-down list to select the cloud service account to which you want to send the report. After the report is generated, it is exported to the cloud service account's storage.

This is a custom report. See Managing Custom HTML Reports for more information about configuring custom reports.

Occupancy by Unit Type Columns

Unified Platform: ≡ Navigation Menu > Reports > Manage Reports > Last Run Date > View Report

Information appears in the following columns from left to right on the page. This assumes you included all available columns and sorted the columns in the listed order.

Required Columns

- **Unit Types:** This is the unit bedroom size. The report is hard-coded to show these types:
  - **2Bd:** This row shows occupancy data for two-bedroom units.
  - **3Bd:** This row shows occupancy data for three-bedroom units.
  - **4Bd:** This row shows occupancy data for four-bedroom units.
  - **5Bd:** This row shows occupancy data for five-bedroom units.
  - **6Bd:** This row shows occupancy data for six-bedroom units.
  - **7Bd:** This row shows occupancy data for seven-bedroom units.

Optional Columns

- **Inventory:** This is the total number of units (online + offline) for this bedroom size.
  - An online unit is any unit that is available and vacant, occupied, or pre-leased for this bedroom size.
  - An offline unit is any unit that is flagged as unavailable for some reason for this bedroom size. For example, it is a down unit, employee unit, model, and so on.

  Inventory is the sum of these amounts. Calculated as:

Online Phase 1 + Relocation/Offline Phase 1

- **Occupancy Inventory %:** This is the percentage of occupied units in current inventory for this bedroom size. Calculated as:

  Total Occupied ÷ Inventory

- **Occupancy Online %:** This is the percentage of occupied units that are online for this bedroom size. Calculated as:

  Total Occupied ÷ Online Phase 1

- **Online Phase 1:** This is the total number of online units for this bedroom size. Calculated as:

  Inventory – Relocation/Offline Phase 1

- **Relocation/Offline Phase 1:** This is the total number of units flagged as unavailable for this bedroom size.
- **Total Available:** This is the total number of vacant and available units for this bedroom size.
- **Total Occupied:** This is the total number of occupied units for this bedroom size.
- **Unleased > 30 Days:** This is the total number of units vacant for more than 30 days for this bedroom size.

Occupancy PAM Report

Unified Platform ≡ Navigation Menu > Reports > Manage Reports > Residents/Military (Reports Area) > Occupancy PAM

This is a custom report. See Managing Custom HTML Reports for more information about configuring custom reports.

The *Occupancy PAM* report provides occupancy information by rank and unit type (in number of bedrooms). Use this report to determine the number of occupied units and the number of people on the waitlist for a given rank or unit type.

By default, the report provides occupancy data for the entire property. If you want to view statistics for specific subdivisions, you must edit column/report properties at report submission and select the subdivisions whose occupancy counts you want totaled in the report.

Portfolio Asset Management (PAM) Reporting – U.S. Army

Property management companies that manage privatized housing at Army installations must provide oversight reporting to the U.S. military on a quarterly basis. The *Occupancy PAM* report meets the requirements of critical Army reporting. If this property is an Army installation, run this report quarterly and submit it to the applicable military entity.

Occupancy PAM Options

Unified Platform ≡ Navigation Menu > Reports > Manage Reports > Residents/Military (Reports Area) > Occupancy PAM

The *Occupancy PAM* report provides the following options used to select the information in the report and determine the report format.

Report Options

- **Generate Now:** To generate the report immediately, leave this option selected.
- **Schedule for Later:** To generate the report at a future date or time, select this option, and then perform the following:
  - Click the **Calendar** in the **Date** field, and then select the date you want to run the report.
  - Use the **Time** drop-down list to select the time when you want to generate the report. You can select any time of day in 30-minute increments.
- **Format:** Choose the report format. Available file types include:
  - **Standard XML:** To generate the report as an XML file, select this option. See **Viewing Completed Reports or Extracts** for information on viewing an XML report.
  - **HTML Report:** To generate and view the report in HTML, select this option. See Viewing Completed Reports or Extracts for information on viewing an HTML report.

    - **Excel Export:** To generate the report as an XLS file, select this option. Reports generated in Excel format automatically download when completed.
- **Select Property:** Use this drop-down list to select the properties. You can scroll through the list or type a few characters of the property name in the **Search** field to find and select properties. Click the ✕ **Clear** button in the **Search** field to type a new value. If you have access to only one property, the property is selected by default.
- **Send Email to External Recipient(s) upon Completion:** If you have the "External Report Distribution" right, you can type an email address in this field to send an email message to people outside of your organization. Use a semicolon to separate multiple email addresses. After the report is generated, an email message with a link to the report is sent.
- **Send Notification to Internal User(s) Upon Completion:** To send a notification to an internal user that the report is complete, use this drop-down list. You can select multiple users by selecting the check box beside each user you want to include.
- **Send File to Cloud Service upon Completion:** If you have the "External Report Distribution" right, you can use this drop-down list to select the cloud service account to which you want to send the report. After the report is generated, it is exported to the cloud service account's storage.

This is a custom report. See Managing Custom HTML Reports for more information about configuring custom reports.

Occupancy PAM Columns

Unified Platform: ≡ Navigation Menu > Reports > Manage Reports > Last Run Date > View Report

Information appears in the following columns from left to right on the page.

- **(By Rank/By Housing Size):** This column lists these sections: *Occupants by Rank*, *Homes Occupied by Housing Size*, and *Other Residents Breakdown*. Each section is defined below.
    - **Occupants by Rank:** This section lists the military ranks used for PAM reporting. The ranks are:
        - **GFOQ (General and flag officer quarters):** This line item summarizes occupancy data for service members of military rank O7 or higher.
        - **SGO (Senior grade officer quarters):** This line item summarizes occupancy data for service members of military rank O6.
        - **FGO (Field grade officer quarters):** This line item summarizes occupancy data for service members of military ranks O4–O5 and W4–W5.
        - **CGO (Company grade officer quarters):** This line item summarizes occupancy data for service members of military ranks O1–O3, O1E–O3E, and W1–W3.

    - **SNCO (Senior NCO quarters):** This line item summarizes occupancy data for service members of military ranks E7–E9.
    - **JNCO/JENL (Enlisted and junior NCO quarters):** This line item summarizes occupancy data for service members of military ranks E1–E6.
    - **Other*:** All other residents not included in the groups above are totaled in this line item in the report.
    - **Total:** This line item summarizes occupancy data for all military ranks.
  - **Homes Occupied by Housing Size:** This section lists unit types by number of bedrooms.
    - **2 BR:** This line item shows occupancy data for two-bedroom units.
    - **3 BR:** This line item shows occupancy data for three-bedroom units.
    - **4 BR:** This line item shows occupancy data for four-bedroom units.
    - **5 BR:** This line item shows occupancy data for five-bedroom units.
    - **6 BR:** This line item shows occupancy data for six-bedroom units.
    - **7 BR:** This line item shows occupancy data for seven-bedroom units.
    - **8 BR:** This line item shows occupancy data for eight-bedroom units.
    - **9 BR:** This line item shows occupancy data for nine-bedroom units.
    - **10 BR:** This line item shows occupancy data for ten-bedroom units.
    - **Total:** Occupancy for all unit types or housing sizes are totaled in this line item in the report.
  - **Other Residents Breakdown:** This section lists resident designations. You define resident designations in Unified Platform Settings. When the head of household is not an active duty service member, you select a designation for a resident on the **Lease Information** tab on the **Lease Details** tab on the **Account Profile** page.

    Sometimes referred to as the "occupancy waterfall," this section shows the specific groups of residents that live on the base that are not active duty service members. Depending on the defined resident designations and those selected for residents at your property, the waterfall could consist of: other military members not assigned to the installation or unaccompanied service members, federal civil service employees, retired military, guard and reserve military, retired federal civil service employees, DOD contractors/permanent employees, and the general public.
- **Homes Online – Begin State:** This is the number of available units as of the date of project transfer.
  - In the *Occupants by Rank* section, only zeros display.
  - In the *Homes Occupied by Housing Size* section, this is the number entered for the bedroom size in the *Inventory by Bedroom* section on the **Privatized Military** page in Unified Platform Settings.

- **Homes Online – End State:** This is the number of units planned for availability at the end of the initial development period.
  - In the *Occupants by Rank* section, this is the number entered for the bedroom size in the *Target Unit Occupancy by Rank* section on the **Privatized Military** page in Unified Platform Settings.
  - In the *Homes Occupied by Housing Size* section, this is the number entered for the bedroom size in the *Inventory by Bedroom Count* section on the **Privatized Military** page in Unified Platform Settings.
- **Homes Online – Current Quarter:** This is the average number of available units during the current quarter. For example, if 10, 15, and 20 units are available at the end of each month in the quarter, this is:

  $$(10 + 15 + 20) \div 3 = 15$$
- **Occupied:** This is the average number of occupied units during the quarter. For example, if 4000, 3995, and 4110 units are occupied at the end of each month in the quarter, this is:

  $$(4000 + 3995 + 4110) \div 3 = 4035$$
- **Waiting:** This is the average number of people on the waitlist during the current quarter. For example, if 5, 10, and 3 people are on the waitlist at the end of each month in the quarter, this is:

  $$(5 + 10 + 3) \div 3 = 6$$

Rent Roll Detail Report

Unified Platform: ≡ Navigation Menu > Reports > Manage Reports > Reports tab > Residents/Management (Report Area) > Rent Roll Detail

This is a custom report. See Managing Custom HTML Reports for more information about configuring custom reports.

The *Rent Roll Detail* report provides unit data and lease and scheduled billing information for current residents. For residents who are service members, you can include military demographics in the report, such as the person's rank (or pay grade), military unit, and branch.

Rent Roll Detail Options

Unified Platform ≡ Navigation Menu > Reports > Manage Reports > Residents/Military (Reports Area) > Rent Roll Detail

The *Rent Roll Detail* report provides the following options used to select the information in the report and determine the report format.

Report Options

- **Generate Now:** To generate the report immediately, leave this option selected.
- **Schedule for Later:** To generate the report at a future date or time, select this option, and then perform the following:
  - Click the **Calendar** in the **Date** field, and then select the date you want to run the report.
  - Use the **Time** drop-down list to select the time when you want to generate the report. You can select any time of day in 30-minute increments.
- **Format:** Choose the report format. Available file types include:
  - **Standard XML:** To generate the report as an XML file, select this option. See **Viewing Completed Reports or Extracts** for information on viewing an XML report.
  - **HTML Report:** To generate and view the report in HTML, select this option. See Viewing Completed Reports or Extracts for information on viewing an HTML report.
  - **Excel Export:** To generate the report as an XLS file, select this option. Reports generated in Excel format automatically download when completed.
  - **CSV Export:** To generate the report as a CSV file, select this option. Reports generated in CSV format automatically download when completed.
- **Select Property:** Use this drop-down list to select the properties. You can scroll through the list or type a few characters of the property name in the **Search** field to find and select properties. Click the × **Clear** button in the **Search** field to type a new value. If you have access to only one property, the property is selected by default.

- **Send Email to External Recipient(s) upon Completion:** If you have the "External Report Distribution" right, you can type an email address in this field to send an email message to people outside of your organization. Use a semicolon to separate multiple email addresses. After the report is generated, an email message with a link to the report is sent.
- **Send Notification to Internal User(s) Upon Completion:** To send a notification to an internal user that the report is complete, use this drop-down list. You can select multiple users by selecting the check box beside each user you want to include.
- **Send File to Cloud Service upon Completion:** If you have the "External Report Distribution" right, you can use this drop-down list to select the cloud service account to which you want to send the report. After the report is generated, it is exported to the cloud service account's storage.

This is a custom report. See Managing Custom HTML Reports for more information about configuring custom reports.

Rent Roll Detail Columns

Unified Platform: ≡ Navigation Menu > Reports > Manage Reports > Last Run Date > View Report

Information appears in the following columns from left to right on the page. This assumes you included all available columns and sorted the columns in the listed order.

Required Columns

- **Unit:** This is the unit number.

Lease

The report retrieves this information from the lease and scheduled billing. Most information displays on the person's **Account Profile** page.

- **Deposits:** This is the total of deposit payments made by the current resident.
- **Lease ID:** This is the system-assigned lease ID.
- **Lease End Date:** This is the lease end date.
- **Lease Start Date:** This is the lease start date.
- **Lease Term:** This is the lease term.
- **Military Allotment Settings (Allotment Method):** This is the service member's allotment method.
- **Military Allotment Settings (Service Member):** This is the name of the service member the allotment is based on.
- **Move In Date:** This is the move-in date. At report generation, you can limit the report to residents whose move-in date falls within a particular date range by editing the column properties.

- **Move Out Date:** If the resident has given notice, this is the scheduled move-out date. This column is blank for vacant units or residents who haven't given notice. At report generation, you can limit the report to residents whose move-out date falls within a particular date range by editing the column properties.
- **Occupants(s):** This is the number of occupants specified on the person's **Lease Information** tab on the **Lease Details** tab on the **Account Profile** page.
- **Resident Designation:** This is the resident designation assigned to this unit in Unified Platform Settings.
- **Subjournal Name:** This is the name of the subjournal.
- **Subjournal Total Billing:** This is the total scheduled billing amount for this subjournal.
- **Total Billing:** This is the total scheduled billing amount, regardless of the subjournal.

Resident

The report retrieves the following information from the contact's **General Information** page unless otherwise specified.

- **Active Duty Service Member:** This indicates whether the contact is an active duty service member in the U.S. military.
- **BAH Rate Protection Year:** This is the service member's BAH protection year, if one is specified in OneSite. If blank, the resident's protection year is N/A. At report generation, you can limit the report to residents who have a particular protection year or no year by editing column properties. For example, if you select "N/A," the report includes residents who don't have a protection year specified in OneSite.
- **Branch:** This is the service member's military branch.
- **Calculate BAH with Dependents:** This indicates whether the service member's BAH rate is calculated with dependents.
- **Date of Rank:** This is the service member's date of rank.
- **Deployed:** This is Y or N based on whether the **Deployed** field is enabled.
- **Duty Postal Code:** This identifies the location of the military installation the service member is assigned to.
- **Eligibility Date:** This is the date the service member is eligible for housing.
- **Email – Emergency Email:** This is the email address of the emergency contact, as listed on the head of household's **Emergency contact** tab.
- **Email – Resident Email:** This is the head of household's email address, as listed in the *Contact information* section on the **General information** tab.
- **Email – Work Email:** This is the head of household's work email address, as listed in the *Current employment* section on the **Employment** tab.
- **Expected Return Date:** If the service member is deployed, this is the expected return date.
- **Marital Status:** This is the person's marital status.

- **Military UIC Address1:** This is the first address line of a UIC code, as defined in the *Unit Identification Codes (UIC)* section on the **Military Housing** page in Unified Platform Settings. The UIC identifies a command or unit in the base that soldiers report to each day when not deployed.

  You assign a UIC code to a service member when you edit the person's contact record and select a military unit.

- **Military UIC Address2:** This is the second address line of the UIC code that corresponds to the military unit the service member is assigned to.
- **Military UIC City:** This is the city associated with the address of the UIC code that corresponds to the military unit the service member is assigned to.
- **Military UIC DSN Number:** This is the defense switched network (DSN) number of the UIC code that corresponds to the military unit the service member is assigned to.
- **Military UIC Name:** This is the UIC name of the military unit selected for the service member at the person's contact record.
- **Military UIC Phone:** This is the phone number of the UIC code that corresponds to the military unit the service member is assigned to.
- **Military UIC State:** This is the state of the UIC code address that corresponds to the military unit the service member is assigned to.
- **Military UIC Zip Code:** This is the ZIP Code of the UIC code address that corresponds to the military unit the service member is assigned to.
- **Military Unit Identification Code (UIC):** This is the UIC code that corresponds to the military unit the service member is assigned to.
- **Pay Grade:** This is the service member's military rank.
- **Phone1:** This is the resident's home phone number.
- **Rank Abbrev:** This is the rank abbreviation that corresponds to the rank title of the service member.
- **Rank Title:** This is the service member's rank title.
- **Service Member:** This is the resident's name (head of household). The resident name will appear in this column, even if the person isn't flagged as an active duty service member.

Unit

The report pulls information in this section from Unified Platform Settings.

- **Bedroom(s):** This is the number of bedrooms the unit has.
- **Building:** This is the building number.
- **Constructed Unit:** If this is a constructed unit, then this is **Yes**. Otherwise, this is **No**.
- **Constructed Unit Check Box Update:** If **Yes** appears in the **Constructed Unit** column for the unit, then this is the system date the unit was identified in the system as a constructed unit.
- **Demolished Unit**: If this is a demolished unit, then this is **Yes**. Otherwise, this is **No**.

- **Demolished Unit Check Box Update:** If **Yes** appears in the **Demolished Unit** column for the unit, then this is the system date the unit was identified in the system as a demolished unit.
- **Floor Plan:** This is the floor plan code.
- **Floor Plan Group:** This is the name of the floor plan group.
- **Market Rent:** This is market rent for the unit. Calculated as:

  Base Rent + Unit Amenities
- **Market Rent + Addl:** This is the market rent plus additional charges for the unit. Calculated as:

  Base Rent + Additional Charges and Credits + Unit Amenities
- **MHV:** This is mobility (M), hearing (H), vision (V), or a combination of the three options, based on the unit's accessible features.
- **Parcel:** This is the parcel ID assigned to the unit. This information is located on the **Military Housing** page in RealPage Unified Settings.
- **Remodeled Unit:** If this is a remodeled unit, then this is **Yes**. Otherwise, this is **No**.
- **Remodeled Unit Check Box Update:** If **Yes** appears in the **Remodeled Unit** column for the unit, then this is the system date the unit was identified in the system as a remodeled unit.
- **Renovated Date:** This is the **Renovated** date. It is blank if there is no date is entered.
- **Sq Ft:** This is the rentable square footage assigned to all units in this floor plan.
- **Subproperty:** This is the subproperty assigned to the unit.
- **Subdivision:** This is the subdivision assigned to the unit. This information is located on the **Military Housing** page in RealPage Unified Settings.
- **Unit Address1:** This is the first line of the unit address.
- **Unit Address2:** This is the second line of the unit address.
- **Unit City:** This is the city of the unit address.
- **Unit Designation:** This is the unit designation code assigned to the unit.
- **Unit FP High Rank Band:** This is the higher military rank of the rank band assigned to the floor plan.
- **Unit FP Low Rank Band:** This is the lower military rank of the rank band assigned to the floor plan.
- **Unit High Rank Band:** This is the higher military rank assigned to the unit if any. If the floor plan rank band was overridden at the unit, this is the higher military rank that was assigned.
- **Unit Low Rank Band:** This is the lower military rank assigned to the unit, if the floor plan rank band was overridden at the unit.
- **Unit State:** This is the state of the unit address.
- **Unit Status:** This shows the residency status of the current resident. The status is *Occupied*, *Occupied–NTV*, *Vacant–Leased*, or *Vacant*.
- **Unit Zip Code:** This is the ZIP Code of the unit address.

- **Warranty Expiration Date:** This is the **Warranty Expires** date. It is blank if there is no date is entered.

Subdivision Occupancy by Rank Report

Unified Platform ≡ Navigation Menu > Reports > Manage Reports > Residents/Military (Reports Area) > Subdivision Occupancy by Rank

This is a custom report. See Managing Custom HTML Reports for more information about configuring custom reports.

Similar to the *Occupancy by Rank* report, the *Subdivision Occupancy by Rank* report shows occupancy counts, except by subdivision and rank. The report is divided into two parts: military leases and non-military (or non-target) leases.

In the first section, the report shows the number of military leases by rank and subdivision. In the second section, the report lists the number of leases that have non-military personnel living in the units by resident designation code and subdivision. You specify a resident designation code for a non-military lease on the **Lease Information** tab on the **Lease Details** tab on the **Account Profile** page.

To verify the occupancy counts or to determine the units in which service members of a particular rank live, generate the *Rent Roll Detail* (on page 199) report and sort data by pay grade.

Subdivision Occupancy by Rank Options

Unified Platform ≡ Navigation Menu > Reports > Manage Reports > Residents/Military (Reports Area) > Subdivision Occupancy by Rank

The *Subdivision Occupancy by Rank* report provides the following options used to select the information in the report and determine the report format.

Report Options

- **Generate Now:** To generate the report immediately, leave this option selected.
- **Schedule for Later:** To generate the report at a future date or time, select this option, and then perform the following:
  - Click the **Calendar** in the **Date** field, and then select the date you want to run the report.
  - Use the **Time** drop-down list to select the time when you want to generate the report. You can select any time of day in 30-minute increments.
- **Format:** Choose the report format. Available file types include:
  - **Standard XML:** To generate the report as an XML file, select this option. See **Viewing Completed Reports or Extracts** for information on viewing an XML report.
  - **HTML Report:** To generate and view the report in HTML, select this option. See Viewing Completed Reports or Extracts for information on viewing an HTML report.

  - **Excel Export:** To generate the report as an XLS file, select this option. Reports generated in Excel format automatically download when completed.
- **Select Property:** Use this drop-down list to select the properties. You can scroll through the list or type a few characters of the property name in the **Search** field to find and select properties. Click the **Clear** button in the **Search** field to type a new value. If you have access to only one property, the property is selected by default.
- **Send Email to External Recipient(s) upon Completion:** If you have the "External Report Distribution" right, you can type an email address in this field to send an email message to people outside of your organization. Use a semicolon to separate multiple email addresses. After the report is generated, an email message with a link to the report is sent.
- **Send Notification to Internal User(s) Upon Completion:** To send a notification to an internal user that the report is complete, use this drop-down list. You can select multiple users by selecting the check box beside each user you want to include.
- **Send File to Cloud Service upon Completion:** If you have the "External Report Distribution" right, you can use this drop-down list to select the cloud service account to which you want to send the report. After the report is generated, it is exported to the cloud service account's storage.

This is a custom report. See Managing Custom HTML Reports for more information about configuring custom reports.

Subdivision Occupancy by Rank Columns

Unified Platform: Navigation Menu > Reports > Manage Reports > Last Run Date > View Report

Information appears in the following columns from left to right on the page.

- **Rank:** This is the military rank or resident designation code. A separate line item shows for each military rank or resident designation that has current leases in one or more subdivisions. The report lists occupancy counts for military ranks first; resident designations second (in the non-target group). You select a resident designation for non-military residents on the **Lease Information** tab on the **Lease Details** tab on the **Accounts** page. If a non-military lease has no resident designation, the report counts it in the "None" line item.
- **(Subdivision):** This is the total number of leases for this subdivision and rank or resident designation.
- **Total:** This is the total number of leases across all subdivisions for this rank or resident designation.

Totals

- **Total Military:** This row displays below the last US military rank. It shows the total number of leases of military personnel for each subdivision. The grand total shown in the **Total** column is the total number of military leases at the installation.
- **Total Non-Target:** This row displays below the last resident designation. It shows the total number of non-military leases for each subdivision. The grand total shown in the **Total** column is the total number of non-military leases at the installation.
- **Total Occupied:** This row gives the total of all military and non-military leases for each subdivision. The grand total shown in the **Total** column is the total number of leases for the selected subdivision(s).

CHAPTER 3

Rent Stabilization Reports

Rent Stabilization reports are available in the **Residents** reports area. You can generate and view the following reports:

- **Rent Stabilized Rent Roll:** (on page 209) This report shows the floor plan, rent stabilization status, and market rent for vacant and occupied units as of the property date. It also includes lease dates and scheduled billing information for occupied units.
- **Rent Stabilized Rent Roll Detail:** (on page 214) This report shows market rent for occupied and vacant units and actual billings for leased units. It calculates a gross potential billing value as if the property was 100% occupied. Use this report to analyze unit detail information.
- **Rent Stabilized Rent Roll Detail (Excel):** (on page 221) This is the *Rent Stabilized Rent Roll Detail* report, except in an Excel format. This version makes it easy to sort and analyze data. This report shows detailed rent roll information and helps you analyze unit detail information.
- **Rent Stabilized Current Renewal Status:** (on page 227) This report lists expired and expiring leases through several days as of the current property date. You can filter residents by renewal status to view only pending renewals, leases deemed renewed, renewed, or current leases (residents without offers). The report shows the renewal of legal rent and subsidy, parking fees, IAI, and MCI increases before and after September 30 and the renewal and current deposits for renewing residents.

In This Chapter

Rent Stabilized Rent Roll Report

≡ Navigation Menu > Reports > Manage Reports > Residents/Rent Stabilization (Reports Area) > Rent Roll

The *Rent Stabilized Rent Roll* report is a comprehensive snapshot of units as of the current property date. Each vacant and occupied unit shows the floor plan name, rent stabilization status, and market rent. Occupied units include lease dates and rent amounts from scheduled billing. The report provides rents by occupancy status, a rent schedule review, and a floor plan summary that lists the average market rent per square foot.

Rent Stabilized Rent Roll Report Options

The *Rent Stabilized Rent Roll* report provides the following options used to select the information in the report and determine the report format.

Report Options

- **Generate Now:** To generate the report immediately, leave this option selected.
- **Schedule for Later:** To generate the report at a future date or time, select this option, and then perform the following:
  - Click the **Calendar** in the **Date** field, and then select the date you want to run the report.
  - Use the **Time** drop-down list to select the time when you want to generate the report. You can select any time of day in 30-minute increments.
- **Format:** Choose the report format. Available file types include:
  - **PDF:** To generate the report as a PDF file, select this option. Reports generated as PDF files appear on a new browser tab when completed.
  - **Word:** To generate the report as a DOC file, select this option. Reports generated in Word format automatically download when completed.
  - **Excel:** To generate the report as an XLS file, select this option. Reports generated as Excel files are downloaded to your device automatically when completed.
- **Select Property:** Use this drop-down list to select the properties. You can scroll through the list or type a few characters of the property name in the **Search** field to find and select properties. Click the ✕ **Clear** button in the **Search** field to type a new value. If you have access to only one property, the property is selected by default.
- **Send Email to External Recipient(s) upon Completion:** If you have the “External Report Distribution” right, you can type an email address in this field to send an email message to people outside of your organization. Use a semicolon to separate multiple email addresses. After the report is generated, an email message with a link to the report is sent.

- **Send Notification to Internal User(s) Upon Completion:** To send a notification to an internal user that the report is complete, use this drop-down list. You can select multiple users by selecting the check box beside each user you want to include.
- **Send File to Cloud Service upon Completion:** If you have the "External Report Distribution" right, you can use this drop-down list to select the cloud service account to which you want to send the report. After the report is generated, it is exported to the cloud service account's storage.

Parameters

- **Building:** Use the drop-down list to select the building number. The report only includes units in the particular building. Leave **All** selected to report all units.
- **Status:** Use the drop-down list to filter units by rent stabilization status.
  - **All:** This default setting includes all units in the report, regardless of the status.
  - **Exempt:** This option only includes units with an *Exempt* status (*Temporarily Exempt* or *Permanently Exempt*).
  - **Stabilized:** This option only includes units with a *Non-Exempt* status (the units are rent-stabilized).
  - **Destabilized:** This option only includes *Destabilized* units. OneSite updates units with this status when the building's 421-a tax exemption program (the benefit period) expires.
- **Report type:** Use the drop-down list to select the report type. Choices are **Details plus Summary** (default choice), **Details**, or **Summary only**.
- **Display Rent As:** Select the type of rent you want to report:
  - **Market Rent:** This is base rent plus amenity rent. Base rent is the total CA-type transactions scheduled for the floor plan and unit. Amenity rent is the total unit-priced amenities assigned to the unit.
  - **Market +Addl:** This is market rent plus the total non-CA type transactions scheduled for the floor plan or unit, and the transactions are not in the effective rent transaction code group.
- **Sort by:** Use the drop-down list to select the sort method. Choices are **Unit Number** (default choice), **Floor Plan**, or **Stabilization Status**.

Rent Stabilized Rent Roll Report Columns

Unified Platform: ≡ Navigation Menu > Reports > Manage Reports > Last Run Date > View Report

Information in the *Rent Stabilized Rent Roll Report* appears in the following columns from left to right on the page.

- **Bldg/Unit:** This is the building and unit number.

- **Floor Plan:** This is the name of the floor plan associated with this unit.
- **Rent Stabilization Status:** This is the unit's rent stabilization status as of the current property date.
  - **Exempt:** The unit is currently marked as temporarily or permanently exempt in setup. No 2.2 billings will be charged to the unit, until it has the *Non-Exempt* status.
  - **Stabilized:** The unit's status is *Non-Exempt*. The system charges monthly 2.2 billings to the unit when you post scheduled billing.
  - **Destabilized:** The unit's status is *Destabilized*. Units get updated with this status when the building's benefit period ends. Leased units become destabilized after the lease ends, or you override the unit's destabilization date in setup. Destabilized units have no legal rent or 2.2 charges. You can increase rent without limitations.
- **Resident Name:** This is the head of household name.
- **Move In:** This is the move-in date.
- **Lease Start:** This is the lease start date for the current active lease.
- **Lease End:** This is the lease end date for the current active lease.
- **Current Legal Rent:** This is the unit's current legal rent, which appears in the **Units** list and **Legal Rent** pages in **Items and Services**.
- **Market Rent:** This is base rent plus amenity rent. On the **Change Market Amount** page, the **Base rent** field shows the total of floor plan and unit rent transactions. The **Amenity rent** is the total of unit-priced amenities assigned to the unit (if any).
- **Lease Rent:** This is the rent amount in scheduled billing. Specifically, it is the sum of all CA-type charges plus any charges grouped to rent in scheduled billing for the current resident.
- **Resident 2.2 Billing Amount:** This is the 2.2 charge amount in current scheduled billing. If this is blank, either your property doesn't use 421-a, the unit doesn't have 2.2 billings set up, or the billings haven't been added to the lease yet. The system adds effective 2.2 billings to scheduled billing at move-in (for a vacancy lease) or renewal.
- **Current Cumulative 2.2 Amount:** This is the current 2.2 billing amount for the unit in effect as of the current property date. This amount is pulled from the unit's **2.2% Calculations and History** page in setup.
- **Total Lease Charges:** This is the sum of all transactions in scheduled billing effective as of the current property date for this lease.

Summary Sections

There are three summary sections at the end of the unit detail part of the report.

(Rent Summary by Occupancy Status)

The first summary section lists market, potential, and legal rent amounts by occupancy status. If no unit on the report has a particular occupancy status, the totals are zero. From left to right, the columns are:

- **Status Description:** This column lists the following occupancy statuses:
  - **Occupied, not rented:** The unit has a current lease.
  - **Occupied, on notice, not rented:** The unit has a current lease that is on notice, and the unit isn't pre-leased.
  - **Occupied, on notice, rented:** The unit has a current lease that is on notice, and the unit is pre-leased.
  - **Vacant, rented:** The unit is vacant and pre-leased.
  - **Vacant, admin:** The unit is vacant and unavailable. Admin units are flagged as unavailable, and the reason is "Model" in unit setup.
  - **Vacant, down:** The unit is vacant and unavailable. Down units are flagged as unavailable for any reason other than "Model" in unit setup.
  - **Vacant, not rented:** The unit is vacant and available.
- **Market Rent:** This is total market rent for units of this occupancy status.

  The column name is **Market + Addl.** if you selected this option on the **Parameters** page, and this is total market rent plus the sum of all non-CA charges and P-type credits for units of this occupancy status.
- **Potential Rent:** This is the potential rent for this occupancy status. For occupied units, this is total lease rent. For vacant units, this is total market rent.
- **Current Legal Rent:** This is total current legal rent for this occupancy status.
- **Number of Units:** This is the total number of units for this occupancy status.
- **(Grand Totals):** Each column is totaled. The total number of units matches the number at the property, and the number of units listed on the detail report, if you generated the detail.

(Rent Schedule)

This section summarizes rent and deposit amounts:

- **Units Occupied – Actual Billing Amount:** This is the total amount of scheduled billings.
- **Units Vacant – Billing Potential:** This is the total billing potential of vacant units from the **(Rent Summary)** above. Specifically it is the total of **Potential Rent** for:

  Vacant rented + admin + down + Vacant, not rented
- **100% (Gross) Potential Billing Value:** This is total potential income:

  Units occupied – Actual billing amount
  + Units vacant – Billing potential
- **(Total Scheduled Deposits):** This is total amount of deposits scheduled in unit setup.
- **Total Deposits on Hand:** This is total deposits paid.
- **Total Rentable Square Footage:** This is the total rentable SqFt of all units at the property.

(Floor Plan Summary)

The final summary shows floor plan statistics. In OneSite, you can calculate these manually by sorting units by floor plan in unit setup, and then calculating totals for number of units, rentable SqFt, and market rent of units in the floor plan.

From left to right, the columns are:

- **Floor Plan:** This is the floor plan name (or description).
- **# Units:** This is the total number of units associated with this floor plan.
- **Average Sq Ft:** This is the average rentable SqFt of units in this floor plan. Calculated as:

  Total Rentable SqFt ÷ # Units
- **Average Market Rent:** This is the average market rent of units in this floor plan. Calculated as:

  Total Market Rent ÷ # Units

  If you selected the **Market + Addl.** option on the **Parameters** page, then this is total market rent plus additional non-CA charges and P-type credits for each unit in the floor plan divided by the number of units in the floor plan:
- **Market Amt/Sq Ft:** This is the average market rent divided by the average floor plan square footage. Calculated as:

  Average Market Rent ÷ Average SqFt

  If you selected the **Market + Addl.** option on the **Parameters** page, then this is the average market rent plus additional charges and credits divided by the average floor square footage. Calculated as:

  Average Market + Addl. ÷ Average SqFt
- **Average Leased:** This is the average lease rent for this floor plan. Calculated as:

  Total Scheduled Billings of Leased Units in this Floor Plan
  ÷ Units Occupied

  Leased Amt/Sq Ft: This is the average rent of leased units by square footage for this floor plan. Calculated as:

  Average Leased ÷ Average Rentable SqFt of Leased Units
- **Units Occupied:** This is the total number of occupied units for this floor plan.
- **Occupancy %:** This is the percentage of occupied units for this floor plan. Calculated as:

  Units Occupied ÷ # Units
- **Units Available:** This is the total number of available, vacant units for this floor plan.
- **(Grand Totals/Averages):** Each column is totaled or averaged.

Rent Stabilized Rent Roll Detail Report

≡ Navigation Menu > Reports > Manage Reports > Residents/Rent Stabilization (Reports Area) > Rent Roll Detail

The *Rent Roll Detail* report is a comprehensive snapshot of units as of the current property date. The report has detail and summary sections.

The detail section shows the rent stabilization exemption status and market rent for units. More detail is provided for occupied units, including the resident's name, lease dates, paid deposits, legal rent, market rent, and items from scheduled billing. If the property receives a tax exemption through the 421-a program and the unit has effective charges during the lease term, the report lists the unit's 2.2 billings.

The summary lists rents by occupancy status, provides a rent review schedule, and includes a floor plan summary that shows average market rent per square foot.

Report Differences

The *Rent Stabilized Rent Roll* report is similar to the *Rent Stabilized Rent Roll Detail* report. Both show vacant and occupied units and lease information. The detail report, however, lets you filter transactions by subjournal, and it lists detail scheduled billings. Rent and other charges/credits are listed separately; the regular report shows only lease rent amounts. Also, the detail report shows deposits on hand, and it lists a resident's lease status (Occupied or Occupied – NTV), allowing you to view any residents who are on notice. The regular report doesn't identify residents who are on notice.

Rent Stabilized Rent Roll Detail Report Options

The *Rent Stabilized Rent Roll Detail* report provides the following options used to select the information in the report and determine the report format.

Report Options

- **Generate Now:** To generate the report immediately, leave this option selected.
- **Schedule for Later:** To generate the report at a future date or time, select this option, and then perform the following:
    - Click the **Calendar** in the **Date** field, and then select the date you want to run the report.
    - Use the **Time** drop-down list to select the time when you want to generate the report. You can select any time of day in 30-minute increments.
- **Format:** Choose the report format. Available file types include:
    - **Standard XML:** To generate the report as an XML file, select this option. See **Viewing Completed Reports or Extracts** for information on viewing an XML report.

  - **HTML Report:** To generate and view the report in HTML, select this option. See Viewing Completed Reports or Extracts for information on viewing an HTML report.
  - **Excel Export:** To generate the report as an XLS file, select this option. Reports generated in Excel format automatically download when completed.
  - **CSV:** To generate the report as a CSV file, select this option. Reports generated as a CSV file automatically download when completed.
- **Select Property:** Use this drop-down list to select the properties. You can scroll through the list or type a few characters of the property name in the **Search** field to find and select properties. Click the **Clear** button in the **Search** field to type a new value. If you have access to only one property, the property is selected by default.
- **Send Email to External Recipient(s) upon Completion:** If you have the “External Report Distribution” right, you can type an email address in this field to send an email message to people outside of your organization. Use a semicolon to separate multiple email addresses. After the report is generated, an email message with a link to the report is sent.
- **Send Notification to Internal User(s) Upon Completion:** To send a notification to an internal user that the report is complete, use this drop-down list. You can select multiple users by selecting the check box beside each user you want to include.
- **Send File to Cloud Service upon Completion:** If you have the “External Report Distribution” right, you can use this drop-down list to select the cloud service account to which you want to send the report. After the report is generated, it is exported to the cloud service account’s storage.

Parameters

- **Rent Stabilization Status:** Use the drop-down list to filter units by rent stabilization status.
  - **All:** This default setting includes all units in the report, regardless of the status.
  - **Exempt:** This option only includes units with an *Exempt* status (*Temporarily Exempt* or *Permanently Exempt*).
  - **Stabilized:** This option only includes units with a *Non-Exempt* status (the units are rent stabilized).
  - **Destabilized:** This option only includes *Destabilized* units. OneSite updates units with this status when the building’s 421-a tax exemption program (the benefit period) expires.
- **Report type:** Use the drop-down list to select the report type. Choices are **Details plus Summary** (default choice), **Details**, or **Summary only**.
- **Include Subjournal Transactions:** Activate this switch to include subjournal transactions.

  When the switch is off (deactivated), the report’s **Transaction Code** column will be blank, and the **Amount** column will show 0.00 amounts.

- **Subjournals:** This drop-down list will appear if you activate the **Include Subjournal Transactions** switch. Use it to select a specific subjournal. Choices are:

  - **All:** This option includes transactions from all subjournals. If the property doesn't use subjournals (the feature is deactivated in setup), this option defaults to **All**, and you cannot change it.

    This option controls the information in the following columns:

    - **Transaction Code** and **Amount:** Each CA-type charge and amount in scheduled billing, regardless of the subjournal, will display in these columns for the occupied unit.
    - **Other Charges/Credits Code** and **Other Charges/Credits Amount:** Each non-CA type charge/credit and amount in scheduled billing, regardless of the subjournal, will display in these columns for the occupied unit.
  - **Resident:** Select this option to include transactions in current scheduled billing associated with the **Resident** subjournal only.
  - **(Other):** The names of other subjournals the property has defined appear in the list. Choose one to include transactions in current scheduled billing associated with that subjournal only.

    > **If the resident has no transactions in scheduled billing from the selected subjournal, the resident is excluded from the report.**

- **Include Market Rent:** Activate this switch to include market rent in the report as follows:
  - If you leave the switch off (deactivated), then no market rent is reported for units on the detail or summary (the system removes the column from the report).
  - If you activate the switch, use the **Display Unit Rent As** drop-down list to select how the report will show the market rent. Choices are:
    - **Market Rent:** This is base rent plus amenity rent. Base rent is the total of CA-type transactions scheduled for the floor plan and unit in **Items and Services**. Amenity rent is the total of unit-priced amenities assigned to the unit.

      If your property manages amenities on the Unified Platform, you will manage unit amenities and prices on the **Unified Amenities** tile. Otherwise, you will use the **Maintain Site Amenities** page in classic OneSite or other products (for example, YieldStar®).
    - **Market + Addl.:** This is market rent plus the total of non-CA type transactions scheduled for the floor plan or unit, and the transactions are not in the effective rent transaction code group.
- **Building:** Use the drop-down list to select the building number. The report only includes the units in the particular building. Leave **All** selected to report all units.
- **Sort by:** Use the drop-down list to select the sort method. Choices are **Unit Number** (default choice), **Floor Plan**, or **Stabilization Status**.

Rent Stabilized Rent Roll Detail Report Columns

Unified Platform: ≡ Navigation Menu > Reports > Manage Reports > Last Run Date > View Report

Information in the *Rent Stabilized Rent Roll Detail Report* appears in the following columns from left to right on the page.

- **Bldg/Unit:** This is the building and unit number.
- **Floor Plan:** This is the name of the floor plan associated with this unit.
- **Room Count:** This is the unit's room count.
- **Rent Stabilization Status:** This is the unit's rent stabilization status as of the current property date.
  - **Exempt:** The unit is currently marked as temporarily or permanently exempt in setup. Until it has the *Non-Exempt* status, no 2.2 billings will be charged to the unit if the property uses the 421-a tax abatement program.
  - **Stabilized:** The unit's status is *Non-Exempt*. When you post scheduled billing, the system charges the unit the monthly 2.2 billings if it uses 421-a.
  - **Destabilized:** The unit's status is *Destabilized*. The system updates a unit with this status when the building's benefit period ends unless a unit is leased. Leased units become destabilized after the lease ends, or you override the unit's destabilization date. Destabilized units have no legal rent or 2.2 charges. You can increase rent without limitations.
- **Resident Name:** This is the head of household name.
- **Move In:** This is the move-in date.
- **Lease Start:** This is the lease start date for the current lease.
- **Lease End:** This is the lease end date for the current lease.
- **Deposit on Hand:** This is the total of all paid deposits. When viewing a resident's **Deposits** ledger in new OneSite, this amount appears in the **Deposit Held** field.
- **Current Legal Rent:** The unit's current legal rent appears in the **Units** list and **Legal Rent** pages in **Items and Services**.
- **(Rent):** If you activated the **Include Market Rent** switch on the report parameters page, the column name is the rent type you selected as follows:
  - **Market Rent:** This is base rent plus amenity rent. Base rent is the total CA-type transactions scheduled for the floor plan and unit. Amenity rent is the total of any unit-priced amenities assigned to the unit
  - **Market +Addl:** This is market rent plus the total non-CA type transactions scheduled for the floor plan and unit.

The report excludes the (Rent) column if you left the switch deactivated.

- **Transaction Code:** This is a transaction code in the resident's scheduled billing.
  - If the unit's rent stabilization status is *Stabilized* and the lease status is *Occupied*, the report lists the resident's CA-Rent transaction code in this column. It lists non-CA codes in the **Other Charges/Credits Code** column.
  - If the unit's rent stabilization status is *Stabilized* and the lease status is *Occupied – NTV*, the report lists the resident's CA-Rent and non-CA codes in this column.
- **Amount:** This is the transaction code's scheduled billing amount.
- **Total CA Billings:** This is lease rent. It is the sum of all CA-type charges plus non-CA charges grouped to rent in scheduled billing for the current resident.

  To group non-CA charges to rent, you must add a transaction code group in **Operations** and specify the group as effective rent. For more information, refer to the **Effective Rent Transaction Code Group** in the online help for new OneSite.
- **Other Charges/Credits Code:** This is a non-rent transaction code in the resident's scheduled billing.
  - If the unit's rent stabilization status is *Stabilized* and the lease status is *Occupied*, the report lists the resident's non-CA codes in this column.
  - If the unit's rent stabilization status is *Stabilized* and the lease status is *Occupied – NTV*, the report lists the resident's CA-Rent and non-CA codes in the **Transaction Code** column.
- **Other Charges/Credits Amount:** This is the scheduled billing amount for a non-rent transaction code.
- **Total Billings:** This is the resident's total scheduled billings as of the property date.

Summaries

Three summary sections appear in the *Rent Stabilized Rent Roll Detail* report.

(Rent Summary by Occupancy Status)

The first summary section lists market, potential, and legal rent amounts by occupancy status. If no unit on the report has a particular occupancy status, the totals are zero. From left to right, the columns are:

- **Status Description:** This column lists the following occupancy statuses:
  - **Occupied, Not On Notice:** The unit is leased, and the resident hasn't given notice to move out.
  - **Occupied, On Notice, Not Rented:** The unit's lease is on notice and isn't pre-leased.
  - **Occupied, On Notice, Rented:** The unit's lease is on notice and pre-leased.
  - **Vacant, Rented:** The unit is vacant and pre-leased.
  - **Vacant, Admin:** The unit is vacant and unavailable. Admin units are flagged as unavailable, and the reason is **Model** in **Items and Services**.

  - **Vacant, Down:** The unit is vacant and unavailable. Down units are flagged as unavailable for reasons other than **Model** in **Items and Services**.
  - **Vacant, Not Rented:** The unit is vacant and available.
- **Market Rent:** This is the total market rent for units of this occupancy status.

  If you selected this option on the parameters page, the column name is **Market + Addl.**. It is the total market rent plus the sum of all non-CA charges and P-type credits for units of this occupancy status.
- **Potential Rent:** This is the potential rent for this occupancy status. For occupied units, this is the total lease rent. For vacant units, this is the total market rent.
- **Current Legal Rent:** This is the total legal rent for this occupancy status.
- **Number of Units:** This is the total number of units for this occupancy status.
- **(Totals):** Each column is totaled.

(Rent Schedule)

This section summarizes rent and deposits for the property:

- **Units Occupied – Actual Billing Amount:** This is the total amount of scheduled billings.
- **Units Vacant – Billing Potential:** This is the total billing potential of vacant units from the **(Rent Summary)** above. Specifically, it is the total of **Potential Rent** calculated as:

  Vacant Rented + Admin + Down + Vacant, Not Rented
- **100% (Gross) Potential Billing Value:** This is the total potential income. Calculated as:

  Units Occupied – Actual Billing Amount
  + Units Vacant – Billing Potential
- **Total Scheduled Deposits:** This is the total scheduled deposits.
- **Total Deposits on Hand:** This is the total deposits paid.
- **Total Rentable Square Footage:** This is the total rentable square footage of all units at the property.

(Floor Plan Summary)

This summary shows floor plan statistics. From left to right, the columns are:

- **Floor Plan:** This is the floor plan name (or description).
- **# Units:** This is the total number of units associated with this floor plan.
- **Average Sq Ft:** This is the average rentable SqFt of units in this floor plan. Calculated as:

  Total Rentable SqFt ÷ # Units
- **Average Market Rent:** This is the average market rent of units in this floor plan. Calculated as:

Total Market Rent ÷ # Units

If you selected the **Market + Addl.** option on the parameters page, this amount is the total market rent plus additional non-CA charges and P-type credits for each unit in the floor plan divided by the number of units in the floor plan. Calculated as:

Total Market + Addl. ÷ # Units

- **Market Amt/Sq Ft:** This is the average market rent divided by the average floor plan square footage. Calculated as:

  Average Market Rent ÷ Average SqFt

  If you selected the **Market + Addl.** option on the parameters page, this is calculated as:

  Average Market + Addl. ÷ Average SqFt

- **Average Leased:** This is the average lease rent for this floor plan. Calculated as:

  Total Scheduled Billings of Leased Units in this Floor Plan ÷ Units Occupied

  Leased Amt/Sq Ft: This is the average rent of leased units by square footage for this floor plan. Calculated as:

  Average Leased ÷ Average Rentable SqFt of Leased Units

- **Units Occupied:** This is the total number of occupied units for this floor plan.
- **Occupancy %:** This is the percentage of occupied units for this floor plan. Calculated as:

  Units Occupied ÷ # Units

- **Units Available:** This is the total number of available vacant units for this floor plan.
- **(Totals/Averages):** Each column is totaled or averaged.

Rent Stabilized Rent Roll Detail (Excel) Report

≡ Navigation Menu > Reports > Manage Reports > Residents/Rent Stabilization (Reports Area) > Rent Roll Detail (Excel)

The *Rent Roll Detail (Excel)* report presents the same information as the *Rent Stabilized Rent Roll Detail* report, except in Microsoft Excel. This format makes it easy to sort and access data.

The report has four worksheets.

- Sheet 1 provides the unit lease status (vacant or occupied), rent stabilization exemption status, market rent, and current legal rent. For occupied units, it shows the resident's head of household name, lease dates, deposits paid, and scheduled billing amounts by transaction code.
- The next three worksheets provide property income. Sheet 2 summarizes market rent by occupancy status.
- Sheet 3 shows the property's gross potential billing at 100% occupancy and compares scheduled deposits with paid deposits.
- Sheet 4 summarizes income by floor plan and calculates average market rent per square foot.

Rent Stabilized Rent Roll Detail (Excel) Report Options

The *Rent Stabilized Rent Roll Detail (Excel)* report provides the following options used to select the information in the report and determine the report format.

Report Options

- **Generate Now:** To generate the report immediately, leave this option selected.
- **Schedule for Later:** To generate the report at a future date or time, select this option, and then perform the following:
  - Click the **Calendar** in the **Date** field, and then select the date you want to run the report.
  - Use the **Time** drop-down list to select the time when you want to generate the report. You can select any time of day in 30-minute increments.
- **Format:** Choose the report format. Available file types include:
  - **PDF:** To generate the report as a PDF file, select this option. Reports generated as PDF files appear on a new browser tab when completed.
  - **Word:** To generate the report as a DOC file, select this option. Reports generated in Word format automatically download when completed.
  - **Excel:** To generate the report as an XLS file, select this option. Reports generated as Excel files are downloaded to your device automatically when completed.

- **Select Property:** Use this drop-down list to select the properties. You can scroll through the list or type a few characters of the property name in the **Search** field to find and select properties. Click the **Clear** button in the **Search** field to type a new value. If you have access to only one property, the property is selected by default.
- **Send Email to External Recipient(s) upon Completion:** If you have the “External Report Distribution” right, you can type an email address in this field to send an email message to people outside of your organization. Use a semicolon to separate multiple email addresses. After the report is generated, an email message with a link to the report is sent.
- **Send Notification to Internal User(s) Upon Completion:** To send a notification to an internal user that the report is complete, use this drop-down list. You can select multiple users by selecting the check box beside each user you want to include.
- **Send File to Cloud Service upon Completion:** If you have the “External Report Distribution” right, you can use this drop-down list to select the cloud service account to which you want to send the report. After the report is generated, it is exported to the cloud service account’s storage.

Parameters

- **Building:** Use the drop-down list to select the building number. The report only includes units in the particular building. Leave **All** selected to report all units.
- **Status:** Use the drop-down list to filter units by rent stabilization status.
  - **All:** This default setting includes all units in the report, regardless of the status.
  - **Exempt:** This option only includes units with an *Exempt* status (*Temporarily Exempt* or *Permanently Exempt*).
  - **Stabilized:** This option only includes units with a *Non-Exempt* status (the units are rent stabilized).
  - **Destabilized:** This option only includes *Destabilized* units. OneSite updates units with this status when the building’s 421-a tax exemption program (the benefit period) expires.
- **Report type:** Use the drop-down list to select the report type. Choices are **Details plus Summary** (default choice), **Details**, or **Summary only**.
- **Display Rent As:** Select the type of rent you want to report:
  - **Market Rent:** This is base rent plus amenity rent. Base rent is the total CA-type transactions scheduled for the floor plan and unit. Amenity rent is the total unit-priced amenities assigned to the unit.
  - **Market +Addl:** This is market rent plus the total non-CA type transactions scheduled for the floor plan or unit, and the transactions are not in the effective rent transaction code group.
- **Sort by:** Use the drop-down list to select the sort method. Choices are **Unit Number** (default choice), **Floor Plan**, or **Stabilization Status**.

Rent Stabilized Rent Roll Detail (Excel) Report Columns

Unified Platform: ≡ Navigation Menu > Reports > Manage Reports > Last Run Date > View Report

Information in the *Rent Stabilized Rent Roll Detail (Excel) Report* appears in the following columns from left to right on the page.

- **Bldg/Unit:** This is the building and unit number.
- **Floor Plan:** This is the name of the floor plan associated with this unit.
- **Room Count:** This is the unit's room count.
- **Rent Stabilization Status:** This is the unit's rent stabilization status as of the current property date.
  - **Exempt:** The unit is currently marked as temporarily or permanently exempt in setup. Until it has the *Non-Exempt* status, no 2.2 billings will be charged to the unit if the property uses the 421-a tax abatement program.
  - **Stabilized:** The unit's status is *Non-Exempt*. When you post scheduled billing, the system charges the unit the monthly 2.2 billings if it uses 421-a.
  - **Destabilized:** The unit's status is *Destabilized*. The system updates a unit with this status when the building's benefit period ends unless a unit is leased. Leased units become destabilized after the lease ends, or you override the unit's destabilization date. Destabilized units have no legal rent or 2.2 charges. You can increase rent without limitations.
- **Resident Name:** This is the head of household name.
- **Move In:** This is the move-in date.
- **Lease Start:** This is the lease start date for the current lease.
- **Lease End:** This is the lease end date for the current lease.
- **Deposit on Hand:** This is the total of all paid deposits. The *Deposit Held* status appears in the **Deposits** ledger for all required paid deposits.
- **Current Legal Rent:** The unit's current legal rent appears in the **Units** list and **Legal Rent** pages in **Items and Services**.
- **(Rent):** If you activated the **Include Market Rent** switch on the report parameters page, the column name is the rent type you selected as follows:
  - **Market Rent:** This is base rent plus amenity rent. Base rent is the total CA-type transactions scheduled for the floor plan and unit. Amenity rent is the total of any unit-priced amenities assigned to the unit
  - **Market +Addl:** This is market rent plus the total non-CA type transactions scheduled for the floor plan and unit.

The report excludes the (Rent) column if you left the switch deactivated.

- **Transaction Code:** This is a transaction code in the resident's scheduled billing.
  - If the unit's rent stabilization status is *Stabilized* and the lease status is *Occupied*, the report lists the resident's CA-Rent transaction code in this column. It lists non-CA codes in the **Other Charges/Credits Code** column.
  - If the unit's rent stabilization status is *Stabilized* and the lease status is *Occupied – NTV*, the report lists the resident's CA-Rent and non-CA codes in this column.
- **Amount:** This is the transaction code's scheduled billing amount.
- **Total CA Billings:** This is lease rent. It is the sum of all CA-type charges plus non-CA charges grouped to rent in scheduled billing for the current resident.

  To group non-CA charges to rent, you must add a transaction code group in **Operations** and specify the group as effective rent. For more information, refer to the **Effective Rent Transaction Code Group** in the online help for new OneSite.
- **Other Charges/Credits Code:** This is a non-rent transaction code in the resident's scheduled billing.
  - If the unit's rent stabilization status is *Stabilized* and the lease status is *Occupied*, the report lists the resident's non-CA codes in this column.
  - If the unit's rent stabilization status is *Stabilized* and the lease status is *Occupied – NTV*, the report lists the resident's CA-Rent and non-CA codes in the **Transaction Code** column.
- **Other Charges/Credits Amount:** This is the scheduled billing amount for a non-rent transaction code.
- **Total Billings:** This is the resident's total scheduled billings as of the property date.

Summaries

Three summaries appear on separate sheets in the *Rent Stabilized Rent Roll Detail (Excel)* report.

(Rent Summary by Occupancy Status – Sheet 2)

This summary lists the market, potential, and legal rent amounts by occupancy status. If no unit on the report has a particular occupancy status, the totals are zero for the status. From left to right, the columns are:

- **Status Description:** This column lists the following occupancy statuses:
  - **Occupied, Not On Notice:** The unit is leased, and the resident hasn't given notice to move out.
  - **Occupied, On Notice, Not Rented:** The unit's lease is on notice and isn't pre-leased.
  - **Occupied, On Notice, Rented:** The unit's lease is on notice and pre-leased.
  - **Vacant, Rented:** The unit is vacant and pre-leased.
  - **Vacant, Admin:** The unit is vacant and unavailable. Admin units are flagged as unavailable, and the reason is **Model** in **Items and Services**.

  - **Vacant, Down:** The unit is vacant and unavailable. Down units are flagged as unavailable for reasons other than **Model** in **Items and Services**.
  - **Vacant, Not Rented:** The unit is vacant and available.
- **Market Rent:** This is the total market rent for units of this occupancy status.

  If you selected this option on the parameters page, the column name is **Market + Addl.**. It is the total market rent plus the sum of all non-CA charges and P-type credits for units of this occupancy status.
- **Potential Rent:** This is the potential rent for this occupancy status. For occupied units, this is the total lease rent. For vacant units, this is the total market rent.
- **Current Legal Rent:** This is the total legal rent for this occupancy status.
- **Number of Units:** This is the total number of units for this occupancy status.
- **(Totals):** Each column is totaled.

(Rent Schedule – Sheet 3)

This summary shows rent and deposits for the property:

- **Units Occupied – Actual Billing Amount:** This is the total amount of scheduled billings.
- **Units Vacant – Billing Potential:** This is the total billing potential of vacant units from the **(Rent Summary)** above. Specifically, it is the total of **Potential Rent** calculated as:

  Vacant Rented + Admin + Down + Vacant, Not Rented
- **100% (Gross) Potential Billing Value:** This is the total potential income. Calculated as:

  Units Occupied – Actual Billing Amount
  + Units Vacant – Billing Potential
- **Total Scheduled Deposits:** This is the total scheduled deposits.
- **Total Deposits on Hand:** This is the total deposits paid.
- **Total Rentable Square Footage:** This is the total rentable square footage of all units at the property.

(Floor Plan Summary – Sheet 4)

This summary shows floor plan statistics. From left to right, the columns are:

- **Floor Plan:** This is the floor plan name (or description).
- **# Units:** This is the total number of units associated with this floor plan.
- **Average Sq Ft:** This is the average rentable SqFt of units in this floor plan. Calculated as:

  Total Rentable SqFt ÷ # Units
- **Average Market Rent:** This is the average market rent of units in this floor plan. Calculated as:

Total Market Rent ÷ # Units

If you selected the **Market + Addl.** option on the parameters page, this amount is the total market rent plus additional non-CA charges and P-type credits for each unit in the floor plan divided by the number of units in the floor plan. Calculated as:

Total Market + Addl. ÷ # Units

- **Market Amt/Sq Ft:** This is the average market rent divided by the average floor plan square footage. Calculated as:

  Average Market Rent ÷ Average SqFt

  If you selected the **Market + Addl.** option on the parameters page, this is calculated as:

  Average Market + Addl. ÷ Average SqFt

- **Average Leased:** This is the average lease rent for this floor plan. Calculated as:

  Total Scheduled Billings of Leased Units in this Floor Plan ÷ Units Occupied

  Leased Amt/Sq Ft: This is the average rent of leased units by square footage for this floor plan. Calculated as:

  Average Leased ÷ Average Rentable SqFt of Leased Units

- **Units Occupied:** This is the total number of occupied units for this floor plan.
- **Occupancy %:** This is the percentage of occupied units for this floor plan. Calculated as:

  Units Occupied ÷ # Units

- **Units Available:** This is the total number of available vacant units for this floor plan.
- **(Totals/Averages):** Each column is totaled or averaged.

Rent Stabilized Current Renewal Status Report

≡ Navigation Menu > Reports > Manage Reports > Residents/Rent Stabilization (Reports Area) > Current Renewal Status

The *Current Renewal Status* rent stabilization report lists expired leases and any that are due to expire as of the current property date through the number of days you provide. You can filter the report by renewal status to include only residents with pending renewals, current leases with no renewal offers, or deemed or renewed leases.

The report groups leases by expiration date. Expired leases appear first on the report, followed by expiring leases (current to latest). Each lease shows the resident's name and unit number, current lease term and expiration date, move-in date, IAI and MCI increases, current deposits paid, the lease holdover status (if the resident has an open eviction), and the renewal status.

The report shows data generated through the **Bulk Lease Renewal** or **Generate Renewal Offers** process for renewing residents. You can determine a resident's renewal legal rent and any subsidy, parking fees, the renewal deposit and deposits paid, whether the resident is a holdover, and the renewal status (pending renewal, renewed, or lease deemed).

Rent Stabilized Current Renewal Status Report Options

The *Rent Stabilized Current Renewal Status* report provides the following options used to select the information in the report and determine the report format.

Report Options

- **Generate Now:** To generate the report immediately, leave this option selected.
- **Schedule for Later:** To generate the report at a future date or time, select this option, and then perform the following:
  - Click the **Calendar** in the **Date** field, and then select the date you want to run the report.
  - Use the **Time** drop-down list to select the time when you want to generate the report. You can select any time of day in 30-minute increments.
- **Format:** Choose the report format. Available file types include:
  - **XML:** To generate the report as an XML file, select this option. See Viewing Completed Reports or Extracts for information on viewing an XML report.
  - **PDF:** To generate the report as a PDF file, select this option. Reports generated as PDF files appear on a new browser tab when completed.
  - **Excel Export:** To generate the report as an XLS file, select this option. Reports generated in Excel format automatically download when completed.
- **Select Property:** Use this drop-down list to select the properties. You can scroll through the list or type a few characters of the property name in the **Search** field to find and select

properties. Click the ✕ **Clear** button in the **Search** field to type a new value. If you have access to only one property, the property is selected by default.

- **Send Email to External Recipient(s) upon Completion:** If you have the "External Report Distribution" right, you can type an email address in this field to send an email message to people outside of your organization. Use a semicolon to separate multiple email addresses. After the report is generated, an email message with a link to the report is sent.
- **Send Notification to Internal User(s) Upon Completion:** To send a notification to an internal user that the report is complete, use this drop-down list. You can select multiple users by selecting the check box beside each user you want to include.
- **Send File to Cloud Service upon Completion:** If you have the "External Report Distribution" right, you can use this drop-down list to select the cloud service account to which you want to send the report. After the report is generated, it is exported to the cloud service account's storage.

Parameters

- **Days After Property Date Leases Are Due to Expire:** Type a number of days in this field (1–999). Leases due to expire from the current property date through this number of days are eligible.
- **Renewal Status:** Use the drop-down list to filter units by rent stabilization status.
  - **All:** This default option lets the report include expired leases and leases due to expire within the number of specified days, regardless of renewal status.
  - **Lease Deemed:** This option includes leases deemed renewed. You typically deem a lease renewed if it has a subsidy, and you manually enable the **Lease Deemed** check box on the **Lease Information** page on the resident's **Account Profile** page.
  - **Notice to Vacate:** This option includes leases with a notice to vacate status.
  - **Pending Renewal:** This option includes leases with pending renewal offers or residents who haven't renewed yet.
  - **Renewed:** This option includes renewed residents.
  - **Transferring:** This option includes pending transfers.
  - **Unknown:** This option includes current residents.
- **Include Signed Renewals:** The report includes signed renewals by default (residents with renewed leases during the reporting period). To exclude them, activate the switch.

Rent Stabilized Current Renewal Status Report Columns

Unified Platform: ≡ Navigation Menu > Reports > Manage Reports > Last Run Date > View Report

The *Rent Stabilized Current Renewal Status Report* groups leases by expiration date month and year, showing the total leases in each group. Expired leases appear first followed by expiring leases (current to latest).

Information appears in the following columns left to right on the page.

- **Bldg/Unit:** This is the building and unit number.
- **Resident Name:** This is the head of household name.
- **Current Lease Term:** This is 12 or 24, based on whether the current lease term is a 1- or 2-yr term.
- **Lease Expiration Date:** This is the lease end date.
- **Move-In Date:** This is the move-in date.
- **Renewal Legal Rent:** This is the current legal rent (shown on the resident's **Lease Details** tab) plus the allowed rent stabilization increase from Unified Settings. Amounts are displayed for pending renewals, deemed leases, or renewed leases as follows:
  - For pending renewals, the report shows the renewal legal rent for the 12- and 24-month lease terms.
  - For deemed and renewed leases, the report shows the legal rent and lease term from the renewal lease. The renewal must start on a future date (any date after the property date) to appear on the report.
- **Total Renewal Rent:** This is the total of renewal rent and subsidy charges. Calculated as:

  (Renewal Rent Code ÷ Amount) + (Renewal Subsidy Code ÷ Amount)
  - For pending renewals, 12- and 24-month totals appear.
  - If the lease is renewed or deemed renewed, the total renewal rent for the selected lease term is displayed.
- **Renewal Rent Code/Amount:** This is the total of rent and non-CA subsidy charges in scheduled billing, plus the allowed increase.
  - For pending renewal offers, the report shows the renewal rent for the 12- and 24-month lease terms.
  - For deemed and renewed leases, the report lists the renewal rent for the selected lease term, less IAI and MCI increases.
- **Renewal Subsidy Code/Amount:** This is the renewal subsidy included in the renewal rent amount on the offer or renewed lease. It is the non-CA subsidy transaction in scheduled billing, plus the allowed increase. (You can flag non-CA transactions as subsidy types when adding or editing transaction codes in Unified Settings.)
  - For pending renewals, the report shows the renewal subsidy amount for the 12- and 24-month terms, as shown in the example below:

    12 – Subsidy 55.00

    24 – Subsidy 75.00
  - For renewed and deemed leases, the report shows the renewal subsidy for the selected lease term.

The report includes the renewal subsidy amounts in the base preferential rent and 1- and 2-yr preferential rent increases.

- **Renewal Parking Fee:** This lists each legal rentable item and the renewal amount.

  For pending renewals, the report lists renewal legal items for the 12-month term first, and then for the 24-month term. Items are formatted as x-y, where x is the term (12 or 24) and y is the legal item transaction code. In the example below, the lease has two legal rentable items, one for parking and another for storage:

  12 – PARKING 7.88

  12 – STORAGE 10.00

  24 – PARKING 11.24

  24 – STORAGE 15.00

  For renewed and deemed leases, the report lists the renewal legal items for the selected term.

- **Charges Before Sept. 30:** This is the sum of MCI rent increases plus DHCR increases with begin bill dates on or before the September 30 that precedes the lease end date.
- **Charges After Sept. 30:** This is the sum of MCI increases plus DHCR rent increases with begin bill dates after the preceding September 30 through the lease end date; otherwise, this is blank.
- **Renewal Required Deposit:** This is the renewal required deposit as follows:
  - If the lease has pending renewal offers, the report lists the renewal deposit amounts for the 12-and 24-month lease terms.
  - If the lease is renewed or deemed renewed, this is the lease term and deposit amount.
- **Current Deposit:** This is the total amount of deposits the resident has paid.
- **H*:** This is Y if a legal case is open on the **Legal Case** tab on the resident's **Account Profile** page; otherwise, this is N.
- **Renewal Status:** This is the resident's renewal status, which is one of the following:
  - **Lease Deemed:** The **Lease Deemed** check box is selected on the resident's **Lease Information** page, and the resident has renewed.
  - **Notice to Vacate:** The resident has given notice to move-out.
  - **Pending Renewal:** The resident has pending renewal offers or selected an offer.
  - **Renewed:** The resident has renewed.
  - **Transferring:** The resident has given notice to transfer.
  - **Unknown:** This is a current resident or month-to-month resident whose lease has expired or is about to expire, and the resident has no renewal offers.

CHAPTER 4

Resident Portals Reports

Resident Portals reports are available in the **Residents** reports area. You can generate and view the following reports:

- **Online Renewal Summary:** (on page 232) This report lists the number of lease renewals during the reporting period for the property.
- **Resident Portal Account Summary:** (on page 235) This report lists all the residents and applicants who have resident portal accounts.

In This Chapter

Online Renewal Summary Report

Unified Platform ≡ Navigation Menu > Reports > Manage Reports > Residents/Resident Portals (Reports Area) > Online Renewal Summary

The *Online Leasing Renewal Summary* report lists the number of lease renewals during the reporting period for the property. The monthly totals show renewals completed in Online Leasing and the office.

Online Renewal Summary Options

Unified Platform ≡ Navigation Menu > Reports > Manage Reports > Residents/Resident Portals (Reports Area) > Online Renewal Summary

The *Online Renewal Summary* report provides the following options used to select the information in the report and determine the report format.

Report Options

- **Generate Now:** To generate the report immediately, leave this option selected.
- **Schedule for Later:** To generate the report at a future date or time, select this option, and then perform the following:
  - Click the **Calendar** in the **Date** field, and then select the date you want to run the report.
  - Use the **Time** drop-down list to select the time when you want to generate the report. You can select any time of day in 30-minute increments.
- **Format:** Choose the report format. Available file types include:
  - **PDF:** To generate the report as a PDF file, select this option. Reports generated as PDF files appear on a new browser tab when completed.
  - **Excel:** To generate the report as an XLS file, select this option. Reports generated as Excel files are downloaded to your device automatically when completed.
  - **Raw Data:** To generate the report as a CSV file with additional columns, select this option. See Viewing Completed Reports or Extracts for information on viewing a Raw Data report.
- **Select Property:** Use this drop-down list to select the properties. You can scroll through the list or type a few characters of the property name in the **Search** field to find and select properties. Click the ✕ **Clear** button in the **Search** field to type a new value. If you have access to only one property, the property is selected by default.
- **Send Email to External Recipient(s) upon Completion:** If you have the “External Report Distribution” right, you can type an email address in this field to send an email message to people outside of your organization. Use a semicolon to separate multiple email addresses. After the report is generated, an email message with a link to the report is sent.

- **Send Notification to Internal User(s) Upon Completion:** To send a notification to an internal user that the report is complete, use this drop-down list. You can select multiple users by selecting the check box beside each user you want to include.
- **Send File to Cloud Service upon Completion:** If you have the "External Report Distribution" right, you can use this drop-down list to select the cloud service account to which you want to send the report. After the report is generated, it is exported to the cloud service account's storage.

Parameters

- **Start Date:** Click the **Calendar**, and then select the beginning date of the report period.
- **End Date:** Click the **Calendar**, and then select the ending date of the report period. Items dated on or between the beginning and ending dates will be included on the report.

Online Renewal Summary Columns

Unified Platform: Navigation Menu > Reports > Manage Reports > Last Run Date > View Report

The company name, date range, and the date and time you created the report appear at the top of the page.

The property name appears above the following columns, which print from left to right on the page:

- **Month:** This is a month and year in the date range with renewal activity.
- **Online:** This is the number of lease renewals completed in Online Leasing during the month.
- **Office:** This is the number of lease renewals completed in OneSite during the month.
- **Total:** This is the total of online and office lease renewals for the month for the property.
- **Site Total:** This row appears after a property's last monthly total and sums each of the above columns.
- **PMC Total:** This row appears after the last property in the report and sums each value in all site-total rows to calculate the PMC grand totals for the properties included in the report.

  If the report has only one property, then the PMC totals match the site totals.

If you select **Raw Data** as the format type when you generate the report, the following information appears in a CSV file:

- **Property ID:** This is the unique identifier for the property.
- **Property Name:** This is the name of the property.
- **Month Begin Date:** This is the first date of the month with renewal activity.
- **Online Count:** This is the number of lease renewals completed in Online Leasing during the month.
- **Office Count:** This is the number of lease renewals completed in OneSite during the month.

- **Total Count:** This is the total of online and office lease renewals for the month for the property.

Resident Portal Account Summary Report

Unified Platform ≡ Navigation Menu > Reports > Manage Reports > Residents/Resident Portals (Reports Area) > Resident Portal Account Summary

The *Resident Portal Account Summary* report lists the residents and applicants with resident portal accounts. It indicates whether an account is active and whether the resident has accepted the required privacy policy. It also gives the date and time the person last signed on to the portal and their name, unit number, login name, and email address.

Resident Portal Account Summary Options

Unified Platform ≡ Navigation Menu > Reports > Manage Reports > Residents/Resident Portals (Reports Area) > Resident Portal Account Summary

The *Resident Portal Account Summary* report provides the following options used to select the information in the report and determine the report format.

Report Options

- **Generate Now:** To generate the report immediately, leave this option selected.
- **Schedule for Later:** To generate the report at a future date or time, select this option, and then perform the following:
  - Click the **Calendar** in the **Date** field, and then select the date you want to run the report.
  - Use the **Time** drop-down list to select the time when you want to generate the report. You can select any time of day in 30-minute increments.
- **Format:** Choose the report format. Available file types include:
  - **PDF:** To generate the report as a PDF file, select this option. Reports generated as PDF files appear on a new browser tab when completed.
  - **Excel:** To generate the report as an XLS file, select this option. Reports generated as Excel files are downloaded to your device automatically when completed.
- **Select Property:** Use this drop-down list to select the properties. You can scroll through the list or type a few characters of the property name in the **Search** field to find and select properties. Click the × **Clear** button in the **Search** field to type a new value. If you have access to only one property, the property is selected by default.
- **Send Email to External Recipient(s) upon Completion:** If you have the “External Report Distribution” right, you can type an email address in this field to send an email message to people outside of your organization. Use a semicolon to separate multiple email addresses. After the report is generated, an email message with a link to the report is sent.

- **Send Notification to Internal User(s) Upon Completion:** To send a notification to an internal user that the report is complete, use this drop-down list. You can select multiple users by selecting the check box beside each user you want to include.
- **Send File to Cloud Service upon Completion:** If you have the "External Report Distribution" right, you can use this drop-down list to select the cloud service account to which you want to send the report. After the report is generated, it is exported to the cloud service account's storage.

Parameters

- **Account Status:** Use the drop-down list to select residents based on whether they are active or inactive users of the portal. Active status means that the resident has been granted access to the resident portal in their **Resident profile**. Inactive status means that the person has not been granted access.
- **Status:** Use the drop-down list to select whether you want to include all residents or only current residents in the report.
- **Sort Order:** Use the drop-down list to select the sort order for the report. You can choose **Ascending** or **Descending**.
- **Sort By:** Use the drop-down list to select how you want the information in the report to be sorted. You can choose from **Log in name**, **Email address**, **Resident name**, or **Unit number**.

Resident Portal Account Summary Columns

Unified Platform: ≡ Navigation Menu > Reports > Manage Reports > Last Run Date > View Report

The *Resident Portal Account Summary* report lists the residents and applicants with portal accounts. The name of the company, property, and report prints at the top of each page. For each account, the report prints the following information, from left to right.

- **Login Name:** This is the user name the resident or applicant created.
- **Email Address:** This is the person's e-mail address at the time the account was created.
- **Name:** This is the name of the resident or applicant.
- **Head of Household:** "Yes" in this column indicates that this resident is head-of-household.
- **Unit #:** For residents, this is the resident's unit number. This column is blank for applicants.
- **Active:** This column indicates if the resident or applicant is actively using the resident portal.
- **Accepted:** This column indicates whether the resident has accepted the privacy policy required to use the resident portal.
- **Status:** This column lists the status of the resident at the property.
- **Last Login:** This is the date and time that the resident has last logged in.

CHAPTER 5

Student Reports

Student reports are available in the **Residents** reports area. You can generate and view the following reports:

- **Assigned Roommates:** (on page 239) This report displays a list of assigned roommates by apartment for the current semester or a list of confirmed roommates by apartment for any future semester.
- **Availability:** (on page 241) This report lets you check availability for roommates and helps in the process of assigning units (beds).
- **Bed Fill Forecast:** (on page 247) This report displays occupancy by bed for the selected semester and forecasted assignments for the next two semesters.
- **Current Lease Audit:** (on page 250) This report provides a detailed audit of current leases. Depending on your needs, you can view and filter this report in many ways.
- **Demographics:** (on page 255) This report is a customizable report that can provide Student Living demographics and roommate matching statistics.
- **Lease Statistics:** (on page 266) This report compares the number of leases signed in person in the leasing office to the number of leases completed and electronically signed online using the online portals for a current or future semester.
- **Occupancy Detail Forecast:** (on page 270) This report lists all of your property units with their forecasted occupancy status for the current or future semesters based on scheduled returns, transfers, renewals, and move-outs.
- **Pre-Lease Goals vs. Actuals:** (on page 274) This report compares pre-lease goals to current activity and historical information.
- **Renewal Statistics:** (on page 281) This report shows the number of residents who applied for renewal using the online portal and compares this against the number of residents who applied for renewal in-person at the leasing office.
- **Returning Students:** (on page 290) This report shows students who are set to return for a future semester.
- **Roommate Matching Demographics:** (on page 293) This report helps you match up prospects and waitlist applicants to roommates who have similar preferences and habits.
- **Student Forecasted Rent Roll Detail Modified (Excel):** (on page 297) This report shows detailed rent roll information and helps you analyze unit detail information.
- **Rent Roll Detail Forecast:** (on page 285) This report is a detailed summary of all of the units on your property for the current or future semesters.
- **Unit Availability Forecast:** (on page 304) This report provides a printed version of the **Unit Availability Forecast** snapshot.

In This Chapter

Assigned Roommates Report

Unified Platform: ≡ Navigation Menu > Reports > Manage Reports > Reports tab > Residents/Student (Report Area) > Assigned Roommates

The *Assigned Roommates* report provides a list of assigned roommates (by apartment) for the current semester or any future semester. The report includes the contact information for each person and shows whether the application was completed in OneSite or selected through the online portal.

This report is available for Student Living properties only.

Assigned Roommate Options

The *Assigned Roommate* report provides the following options used to select the information in the report and determine the report format.

Report Options

- **Generate Now:** To generate the report immediately, leave this option selected.
- **Schedule for Later:** To generate the report at a future date or time, select this option, and then perform the following:
  - Click the **Calendar** in the **Date** field, and then select the date you want to run the report.
  - Use the **Time** drop-down list to select the time when you want to generate the report. You can select any time of day in 30-minute increments.
- **Format:** Choose the report format. Available file types include:
  - **Standard XML:** To generate the report as an XML file, select this option. See **Viewing Completed Reports or Extracts** for information on viewing an XML report.
  - **HTML Report:** To generate and view the report in HTML, select this option. See Viewing Completed Reports or Extracts for information on viewing an HTML report.
  - **Excel:** To generate the report as an XLS file, select this option. Reports generated as Excel files are downloaded to your device automatically when completed.
  - **CSV:** To generate the report as a CSV file, select this option. Reports generated as a CSV file automatically download when completed.
- **Select Property:** Use this drop-down list to select the properties. You can scroll through the list or type a few characters of the property name in the **Search** field to find and select properties. Click the × **Clear** button in the **Search** field to type a new value. If you have access to only one property, the property is selected by default.
- **Send Email to External Recipient(s) upon Completion:** If you have the “External Report Distribution” right, you can type an email address in this field to send an email message to

people outside of your organization. Use a semicolon to separate multiple email addresses. After the report is generated, an email message with a link to the report is sent.

- **Send Notification to Internal User(s) Upon Completion:** To send a notification to an internal user that the report is complete, use this drop-down list. You can select multiple users by selecting the check box beside each user you want to include.
- **Send File to Cloud Service upon Completion:** If you have the "External Report Distribution" right, you can use this drop-down list to select the cloud service account to which you want to send the report. After the report is generated, it is exported to the cloud service account's storage.

Parameters

- **Semesters:** Select the check box for one or more semesters for the assigned roommates. If you have not created semesters, create them on the **Student Academic Years** page in **Residents Settings**. You cannot run the *Assigned Roommates* report until your property creates semesters.

Assigned Roommate Columns

The report prints the following information from left to right.

- **Semester:** This is the semester for this section of the report. If you have included multiple semesters when generating this report, each semester appears separately in chronological order.
- **Apartment:** This is the apartment number. For each semester, the report is organized by ascending apartment number.
- **Room:** This is the room designation.
- **Unit:** This is the unit number.
- **Occupancy Status:** This is the lease status of the student. Possible statuses include *Prospect*, *Applicant*, *Waitlist*, and *Resident*.
- **Occupants:** This is the name of each occupant in the apartment.
- **Phone:** This is the phone number for the occupant. The phone number listed might vary depending on the information available for the student. If the home phone number is available for the person, then it is displayed. If the home phone number is unavailable, then the mobile phone number is displayed instead. If the mobile phone number is unavailable, then the work phone number is displayed. If the work phone number is unavailable, then this field will be blank.
- **Email:** This is the email address for the student. If no email address has been entered in OneSite, then this field will be blank.
- **Online:** This shows where the application originated. If an application was completed online, then this field displays a **Y**. If the application was completed using OneSite, this field displays an **N** instead.

Availability Report

RealPage Unified Login> ≡ Navigation Menu > Reports > Manage Reports > Residents/Student (Reports Area) > Availability

The *Availability* report lets you check availability for roommates and helps in the process of assigning units (beds). It shows availability by apartment, room, and unit. Units (beds) that are available and units that will become available in the future are reported by semester.

The report groups units (beds) into up to four categories: available ready units, available not ready units, assigned ready units, and assigned not ready units. The *Available Ready Units* section includes vacant and on notice units that are not pre-leased and the *Available Not Ready Units* section includes units flagged as unavailable and on notice units that are pre-leased. Additionally, the *Assigned Ready Units* section includes all assigned and waitlisted units that have been made ready and the *Assigned Not Ready Units* section includes all assigned and waitlisted units that have not been made ready.

For each unit, the report lists the move-out or scheduled move-out date (if any), number of days vacant, make-ready date (if any), rent amount, the resident's name (if any), and comments. It can also list unit amenities.

The last page of the report summarizes units by floor plan. It shows total available units by occupancy and make ready status and the total number of unavailable units by reason. The summary includes unavailable unit counts, regardless of whether you included unavailable units (in the detail).

This report is available for Student Living properties only.

Availability Options

The *Availability* report provides the following options used to select the information in the report and determine the report format.

Report Options

- **Generate Now:** To generate the report immediately, leave this option selected.
- **Schedule for Later:** To generate the report at a future date or time, select this option, and then perform the following:
  - Click the **Calendar** in the **Date** field, and then select the date you want to run the report.
  - Use the **Time** drop-down list to select the time when you want to generate the report. You can select any time of day in 30-minute increments.
- **Format:** Choose the report format. Available file types include:

  - **PDF:** To generate the report as a PDF file, select this option. Reports generated as PDF files appear on a new browser tab when completed.
  - **Word:** To generate the report as a DOC file, select this option. Reports generated in Word format automatically download when completed.
  - **Excel:** To generate the report as an XLS file, select this option. Reports generated as Excel files are downloaded to your device automatically when completed.
- **Select Property:** Use this drop-down list to select the properties. You can scroll through the list or type a few characters of the property name in the **Search** field to find and select properties. Click the ✕ **Clear** button in the **Search** field to type a new value. If you have access to only one property, the property is selected by default.
- **Send Email to External Recipient(s) upon Completion:** If you have the "External Report Distribution" right, you can type an email address in this field to send an email message to people outside of your organization. Use a semicolon to separate multiple email addresses. After the report is generated, an email message with a link to the report is sent.
- **Send Notification to Internal User(s) Upon Completion:** To send a notification to an internal user that the report is complete, use this drop-down list. You can select multiple users by selecting the check box beside each user you want to include.
- **Send File to Cloud Service upon Completion:** If you have the "External Report Distribution" right, you can use this drop-down list to select the cloud service account to which you want to send the report. After the report is generated, it is exported to the cloud service account's storage.

Parameters

- **Subproperty:** Use the drop-down list to include only eligible units associated with a specific subproperty in the report. Select **All Subproperties** to include all eligible units, regardless of the subproperty.
- **Semester:** Use the drop-down list to specify the semester you want to use as the basis for the report.
- **Display Unit Rent As:** Use the drop-down list to select whether the amount reported for market rent includes additional charges. **Market rent** is the sum of all CA-type charges assigned to the floor plan and/or unit in setup, plus unit amenities. **Market + addl.** is market rent, plus the sum of all non-rent charges and credits (non-CA types) assigned to the floor plan and/or unit in setup.
- **Display Units:** Use the drop-down list to select whether the report will include available units, assigned units, or both.
  - **Both:** Select this option to include all assigned and available units.
  - **Assigned:** Select this option to include only assigned units. This includes assigned and waitlisted units, but not committed units.
  - **Available:** Select this option to include available units.

- **Make Ready Status:** Use the drop-down list to select whether the report will include made ready units, not made ready units, or both.
  - **Both:** Select this option to include units, regardless of the make ready status.
  - **Ready:** Select this option to include only made ready units. This includes NTV units and vacant not leased units that are flagged as made ready.
  - **Not ready:** Select this option to include only units that are not ready for occupancy. These are NTV units and vacant not leased units that are not flagged as made ready.
- **Display Units Where the Lease Expires But Are Not on Notice to Vacate:** Activate this switch to show units as available when a lease has ended for apartments that have not been put on notice to vacate (NTV).
- **Display Amenity List:** Activate this switch to control whether amenities are reported. If activated, the report lists all amenities associated with the unit (both floor plan and unit amenities) and the amenities appear in a separate row below the unit information.
- **Display Scheduled Make Ready Date from Facilities:** Activate this switch to control whether the scheduled make-ready date from OneSite Facilities prints for units that are not made ready.
  - If selected, the **Complete by date** from the Facilities **Make ready board** prints in the **Make Ready** column for units that are not made ready. This date is always one day prior to the unit's **Expected make ready date** assigned in Leasing & Rents.
  - If not selected, the **Make Ready** column shows actual made ready dates for ready units only.

Availability Columns

Unified Platform: ≡ Navigation Menu > Reports > Manage Reports > Last Run Date > View Report

Information appears in the following columns, from left to right on the page:

- **(Status):** This is the unit occupancy status for all units (beds) in this section. The occupancy status prints as a heading above each section. If only a single status was selected in the options page, there will be only one section in the report (plus the *Summary*). If a status has no available units (beds), it will not appear in the report.

  The possible statuses are:

  - **Available Ready:** This section includes vacant and on-notice (NTV) units (beds) that are not pre-leased.
  - **Available Not Ready:** This section includes vacant and on-notice units (beds) that are pre-leased.
  - **Assigned Ready:** This section includes assigned and waitlisted units that are ready to rent.

    - **Assigned Not Ready:** This section includes assigned and waitlisted units that are not ready.
- **Floor Plan:** This is the floor plan code.
- **Floor Plan SqFt:** This is the rentable square footage for the unit. The report retrieves this number from the **Rentable square feet** field in unit setup. Units inherit rentable square footage from the floor plan, but this can be changed on a unit-by-unit basis.
- **Apartment:** This is the building (if buildings are used at this property) and unit (or apartment) number.
- **Room:** This is the bedroom ID, which is usually an alphabetical letter. For example, a four-bedroom apartment might have bedrooms designated with letters A through D.
- **Unit:** This is the bed ID, which identifies which bed this is in the room and apartment. The standard format for the unit number is “Apartment Room Unit.” For example, if apartment 210 has four bedrooms and each bedroom has one bed, the unit (or bed) names are 210A1, 210B1, 210C1, and 210D1. If bedroom “B” has two beds, the second unit is 210B2.

  If you chose to include amenities in the report, the floor plan and unit amenity listing appears below the unit. Up to 1,000 characters can print for the amenity listing.

- **Vacant or NTV:** This is either “Vacant ready”, “Vacant not ready”, or “On notice” depending on whether the apartment has a vacant unit (bed) or a roommate has given notice to move out.
- **Market Rent:** This column appears if **Market rent** was selected on the report’s **Parameters** page. Market rent is the sum of all CA-type charges and credits assigned to the floor plan and/or unit in setup, plus unit amenities.

  (On the **Change rent amounts by unit** page in setup, this is **Market rent + addl. charges/credits** *less* **Other** charges.)

- **Market + Addl.:** This column appears if **Market + addl.** was selected on the report’s **Parameters** page. This is market rent, plus the sum of all non-rent charges and credits (non-CA types) assigned to the floor plan and/or unit in setup.

  (On the **Change rent amounts by unit** page in setup, this is the **Market rent + addl. charges/credits** amount, which includes **Other** type charges and credits.)

- **Move-Out:** For vacant units (beds), this is the date the unit (bed) became vacant. For NTV units (beds), this is the date the resident is scheduled to move out (the “notice given for” date).
- **Days Vacant:** For vacant units (beds), this is the number of days a unit (bed) has been vacant. The number count starts the day after move-out and ends the day before move-in or on the current property date. For NTV units (beds), the number of days vacant is a negative number that represents the number of days until the scheduled move-out date.

- **Make Ready:** This column reflects the actual date a unit was made ready. It may also print the date a unit is scheduled to be made ready from OneSite Facilities, if you chose to include this information on the report's **Options** page.
  - If your property uses Facilities and the unit (bed) is not ready, this is the **Complete by date** shown on the **Make ready board** for the unit (bed). Even if the date has passed, if the unit (bed) is still not made ready, the "Complete make ready by" date is reported.

    Make ready requests are integrated with Leasing & Rents. Whenever a unit's **Expected make ready date** is entered or updated in Leasing & Rents (this date can be updated in unit setup, the **Vacant not ready** snapshot on the **Today** page, the **Edit unit notes and make ready** page on the **Administration** page, and at move-out), Facilities updates the **Complete by date** to be one day prior to the unit's expected make-ready date.

    When the make ready request is completed in Facilities, that date becomes the made ready date for the unit.
  - If you do not use Facilities and the unit is not ready, the make-ready date is blank.
- **Pre-Leased – Date Applied:** This is the date the applicant completed the lease application.
- **Pre-Leased – Scheduled Move-In:** This is the date the pending resident or applicant is scheduled to move in.
- **Pre-Leased – Lease Rent:** This is the scheduled lease rent for the pending resident or applicant. It is the sum of all CA-type charges in scheduled billing, plus any transactions grouped to rent. (A transaction is grouped to rent based on transaction code setup.)
- **Pre-Leased – Name:** This is the name of the applicant or resident who is assigned to the unit (bed). This name displays only for leased units (beds) or reserved units (beds) reserved through CrossFire Prospects.
- **Comments:** This shows any comments or notes added for the unit (bed). Unit notes can be added throughout the system, including setup, the **Vacant not ready** snapshot on the **Today** page (when completing a unit), and the **Edit unit notes and make ready** page on the **Administration** page.

  Additionally, if the report has an *Unavailable Units* section, the reason a unit (bed) was flagged as unavailable is given. For example, if a unit (bed) was flagged as a model unit in setup, the message "Unavailable because of: Model" appears in this column.

Summary (All Statuses by Floor Plan)

This section summarizes availability by floor plan. The report totals each column, with the exception of the **Floor Plan** column.

- **Floor Plan:** This is the name of the floor plan.
- **# Units:** This is the total number of units (beds) reported for this floor plan. This number does not include units that have been marked not to include in occupancy counts on reports.

- **Available – Vacant Not Leased – Ready:** This is the total number of available vacant units (beds) that are not pre-leased, or marked as a waitlisted applicant's preferred unit. These units have also been flagged as made ready for this floor plan.
- **Available – Vacant Not Leased – Not Ready:** This is the total number of available vacant units (beds) that are not pre-leased, or marked as a waitlisted applicant's preferred unit. These units have also been flagged as not made ready for this floor plan.
- **Available – NTV – Not Leased:** This is the count of available units (beds) that are occupied and on-notice (residents have given notice to vacate). These units are not pre-leased to new residents.
- **Available – NTV – Exp:** This is the count of available units (beds) that are not on notice to vacate, but are included as expected because the **For non NTV, consider lease end for availability** parameter was selected, and the resident's lease expires before the selected semester ends. These units have also been flagged as made ready.
- **Assigned – Vacant Not Leased – Ready:** This is the total number of assigned vacant units (beds) that are pre-leased or marked as a waitlisted applicant's preferred unit.
- **Assigned – Vacant Not Leased – Not Ready:** This is the total number of assigned vacant units (beds) that are pre-leased or marked as a waitlisted applicant's preferred unit. These units have also been flagged as not made ready.
- **Assigned – NTV – Not Leased:** This is the count of assigned units (beds) that are occupied and on-notice (resident have given notice to vacate). These units are pre-leased to new residents.
- **Assigned – NTV – Exp:** This is the count of assigned units (beds) that are not on notice to vacate, but are included as expected because the **For non NTV, consider lease end for availability** parameter was selected, and the resident's lease expires before the selected semester ends. These units have also been flagged as made ready.
- **Total:** This is the total number of units (beds) reported for this floor plan. The totals are the same as those listed in the **# Units** column.

Bed Fill Report Forecast

Unified Platform: ≡ Navigation Menu > Reports > Manage Reports > Reports tab > Residents/Student (Report Area) > Bed Fill Forecast

The *Bed Fill Forecast* report provides bed forecast information for three semesters. The report is organized by unit number and lists the person assigned to the bed, whether the lease is month-to-month, and the transfer information. The report is shown for the current or future semester that you select and the next two semesters.

This report is available for Student Living properties only.

Bed Fill Forecast Options

The *Bed Fill Forecast* report provides the following options used to select the information in the report and determine the report format.

Report Options

- **Generate Now:** To generate the report immediately, leave this option selected.
- **Schedule for Later:** To generate the report at a future date or time, select this option, and then perform the following:
  - Click the **Calendar** in the **Date** field, and then select the date you want to run the report.
  - Use the **Time** drop-down list to select the time when you want to generate the report. You can select any time of day in 30-minute increments.
- **Format:** Choose the report format. Available file types include:
  - **HTML Report:** To generate and view the report in HTML, select this option. See Viewing Completed Reports or Extracts for information on viewing an HTML report.
  - **Excel Export:** To generate the report as an XLS file, select this option. Reports generated in Excel format automatically download when completed.
  - **CSV:** To generate the report as a CSV file, select this option. Reports generated as a CSV file automatically download when completed.
- **Select Property:** Use this drop-down list to select the properties. You can scroll through the list or type a few characters of the property name in the **Search** field to find and select properties. Click the ✕ **Clear** button in the **Search** field to type a new value. If you have access to only one property, the property is selected by default.
- **Send Email to External Recipient(s) upon Completion:** If you have the “External Report Distribution” right, you can type an email address in this field to send an email message to people outside of your organization. Use a semicolon to separate multiple email addresses. After the report is generated, an email message with a link to the report is sent.

- **Send Notification to Internal User(s) Upon Completion:** To send a notification to an internal user that the report is complete, use this drop-down list. You can select multiple users by selecting the check box beside each user you want to include.
- **Send File to Cloud Service upon Completion:** If you have the “External Report Distribution” right, you can use this drop-down list to select the cloud service account to which you want to send the report. After the report is generated, it is exported to the cloud service account’s storage.

Parameters

- **Semester:** Use the drop-down list to select the semester for the bed fill forecast. If you have not created semesters, create them on the **Student Academic Years** page in **Residents Settings**. You cannot run the *Bed Fill Forecast Options* report until your property creates semesters.

Bed Fill Forecast Columns

The company name, property name, report name, and selected parameters are at the top of the page. The report prints the following information from left to right:

- **Unit:** This is the unit number. The report is ordered by unit number, and all units are listed.
- **Floor Plan:** This is the floor plan associated with the unit number.
- **(Selected Semester):** This is the semester that you selected when generating the report.
    - **Last:** This is the last name of the student assigned or committed to the unit during the selected semester. The style of the name provides additional information:
        - If the student is on a month-to-month lease, their first and last names are printed in italics.
        - If the student has a preferred unit listing and the unit is not assigned or committed to another resident, their first and last names are underlined.
        - If the student has a preferred unit listing and the unit is not on a month-to-month lease or is leased to another student, their first and last name are printed in bold.
    - **First:** This is the first name of the student assigned or committed to the unit during the selected semester.
    - **Transfer From:** This is the unit that the student transferred from. If the student has not transferred from another unit, this field is blank.
- **(Selected Semester Plus One Month):** This is the next semester (based on the calendar date) after the selected semester. For example, if you selected the Spring 2014 semester when you generated the report, the semester displayed here is the Summer 2014 semester. If there aren’t any future semesters available, then this column is labeled **No Future Semesters Set Up**, and this section of the report will be blank.

  - **Last:** This is the last name of the student assigned or committed to the unit during this semester. The style of the name provides additional information:
    - If the student is on a month-to-month lease, their first and last names are printed in italics.
    - If the student has a preferred unit listing and the unit is not assigned or committed to another resident, their first and last names are underlined.
    - If the student has a preferred unit listing and the unit is not on a month-to-month lease or is leased to another student, their first and last name are printed in bold.
  - **First:** This is the first name of the student assigned or committed to the unit during this semester.
  - **Transfer From:** This is the unit that the student transferred from. If the student has not transferred from another unit, this field is blank.
- **(Selected semester plus two months):** This is the next semester (based on calendar date) after the previous section or two semesters after the semester that you selected when you generated the report. For example, if you selected the Spring 2014 semester when you generated the report, and the Summer 2014 semester is displayed next, then this section displays information for the Fall 2014 semester. If there aren't any future semesters available, then this column is labeled **No Future Semesters Set Up**, and this section of the report will be blank.
  - **Last:** This is the last name of the student assigned or committed to the unit during this semester. The style of the name provides additional information:
    - If the student is on a month-to-month lease, their first and last names are printed in italics.
    - If the student has a preferred unit listing and the unit is not assigned or committed to another resident, their first and last names are underlined.
    - If the student has a preferred unit listing and the unit is not on a month-to-month lease or is leased to another student, their first and last name are printed in bold.
  - **First:** This is the first name of the student assigned or committed to the unit during this semester.
  - **Transfer From:** This is the unit that the student transferred from. If the student has not transferred from another unit, this field is blank.

Current Lease Audit Report

Unified Platform: ≡ Navigation Menu > Reports > Manage Reports > Reports tab > Residents/Student (Report Area) > Current Lease Audit

The *Current Lease Audit* report provides an audit of your current leases. You can generate a detailed report, a summary, or a combination of detail and summary:

- **Detail:** The *Detailed* section of the report is a unit-by-unit listing showing which units are occupied and which are vacant. This section of the report also includes information about floor plans, payment plans, and scheduled billing.
- **Summary:** The *Summary* section includes an occupancy summary by floor plan and an occupancy and rent summary for the current date.

The report provides sort options. If appropriate for your property, you can filter the report by subproperty and subjournal.

This report is available for Student Living properties only.

Current Lease Audit Options

The *Current Lease Audit* report provides the following options used to select the information in the report and determine the report format.

Report Options

- **Generate Now:** To generate the report immediately, leave this option selected.
- **Schedule for Later:** To generate the report at a future date or time, select this option, and then perform the following:
  - Click the **Calendar** in the **Date** field, and then select the date you want to run the report.
  - Use the **Time** drop-down list to select the time when you want to generate the report. You can select any time of day in 30-minute increments.
- **Format:** Choose the report format. Available file types include:
  - **Standard XML:** To generate the report as an XML file, select this option. See **Viewing Completed Reports or Extracts** for information on viewing an XML report.
  - **HTML Report:** To generate and view the report in HTML, select this option. See Viewing Completed Reports or Extracts for information on viewing an HTML report.
  - **Excel Export:** To generate the report as an XLS file, select this option. Reports generated in Excel format automatically download when completed.
  - **CSV Export:** To generate the report as a CSV file, select this option. Reports generated in CSV format automatically download when completed.

- **Select Property:** Use this drop-down list to select the properties. You can scroll through the list or type a few characters of the property name in the **Search** field to find and select properties. Click the × **Clear** button in the **Search** field to type a new value. If you have access to only one property, the property is selected by default.
- **Send Email to External Recipient(s) upon Completion:** If you have the "External Report Distribution" right, you can type an email address in this field to send an email message to people outside of your organization. Use a semicolon to separate multiple email addresses. After the report is generated, an email message with a link to the report is sent.
- **Send Notification to Internal User(s) Upon Completion:** To send a notification to an internal user that the report is complete, use this drop-down list. You can select multiple users by selecting the check box beside each user you want to include.
- **Send File to Cloud Service upon Completion:** If you have the "External Report Distribution" right, you can use this drop-down list to select the cloud service account to which you want to send the report. After the report is generated, it is exported to the cloud service account's storage.

Parameters

- **Sort by:** Use the drop-down list to select how you want to sort the information in the *Current Lease Audit* report. Choose from four different sorting options:
  - **Unit:** Select this option to sort the report by unit number.
  - **Floor plan:** Select this option to sort the report by floor plan. The units are sorted by unit number within each floor plan grouping.
  - **Name:** Select this option to sort the report by resident name. When you choose **Name** as the sorting option, empty units are reported as Vacant or Vacant-Leased. These vacant units are listed after all of the named residents at the bottom of the report.
  - **Payment plan:** Select this option to sort the report based on the resident's payment plan. If you select this option and no payment plans exist for your property, the report will be sorted by unit number instead.
- **Subproperty:** Use the drop-down list to select one or more subproperties that you want to use to filter the report. This drop-down list includes all subproperties set up at your property. If you want to include all units or if your property does not use subproperties, choose "All subproperties."
- **Subjournal:** Use the drop-down list to select one or more subjournals that you want to use to filter the report. This drop-down list includes all subjournals set up at your property. When you generate the report, it includes only transactions associated with the selected subjournals. If you want to include all subjournals, choose "All."
- **Report Type:** Use the drop-down list to select the detail level of the report. Details + Summary is selected by default, but you can choose any of the following:
  - **Details + Summary:** Select this option to include a high-level summary and detailed unit information.

  - **Details:** Select this option to include detailed unit information only.
  - **Summary:** Select this option to include statistical summaries only. Up to four summaries can appear in the report:
    - **Rent Analysis by Floor Plan:** This section provides a rent and occupancy analysis by floor plan.
    - **Occupancy and Rents Summary:** This section provides rent and unit count statistics by occupancy status.
    - **Summary Billing by Subjournal Analysis:** This section summarizes billings by subjournals. Information for the default resident journal and information for other subjournals is available if set up.
    - **Summary Billing by Transaction Code Analysis:** This section summarizes total billings by transaction code.
- **Include Former Accounts:** Activate the switch to include former residents who have open balances, prepaid balances, or delinquent balances in the report.
- **Activity Start Date:** Click the **Calendar** and select the start date for the activity included in the report. You can select today's date, a previous date, or a future date. If you leave this field blank, the report will be generated using today's property date.
- **Show Rent As:** Use the drop-down list to select whether the amount reported for market rent includes additional charges. Choose from the following options:
  - **Market Rent:** Select this option to display the CA and CK charges assigned to the unit in setup.
  - **Market + Addl.:** Select this option to display the market rent plus the sum of all non-rent charges and credits assigned to the unit in setup.

Current Lease Audit Columns

The company name, property name, report name, and selected parameters are at the top of the page.

Current Lease Audit

These fields display for all report types.

- **Unit:** This displays the unit for the resident.
- **Payment Plan:** This displays the payment plan name associated with the unit. Equal payment plan names are displayed here.
- **EP:** If there is an equal payment plan associated with the unit, then this column lists YES.
- **Floor Plan:** This is the floor plan associated with the unit.
- **SQFT:** This is the rentable square footage of the unit.
- **Unit/Lease Status:** This is the occupancy status of the unit, which can be *Occupied*, *Occupied-NTV*, *Pending Renewal*, or *Vacant*.

- **Name:** This is the last and first name of the resident.
- **Move-In/Move-Out:** This displays the move-in date for residents or the scheduled move-in date for applicants and renewals. If the unit is vacant, then this column is blank.
- **Lease Start:** This is the lease start date.
- **Lease End:** This is the lease end date.
- **Market Rent:** This is the market rent associated with the floor plan. This column displays if you chose **Show Unit Rent as Market Rent** in the report options.
- **Market+Addl:** This is the market rent associated with the floor plan, along with any additional (non-CA) charges. This column displays if you chose **Show Unit Rent as Market + Addl** in the report options.

Scheduled Billing Details

This section displays if you have chosen the **Details** or **Summary + Details** report type.

- **Subjournal:** This displays the associated subjournal for the transaction code. If your property does not use subjournals, then this column is blank.
- **Trans Code:** This displays the transaction code for the scheduled billing transaction.
- **Lease Rent:** This displays the lease rent amount associated with the unit.
- **Other Charges/Credits:** This is the amount of all non-rent charges and credits in scheduled billing.
- **Dep On Hand:** This displays the total open deposit amount collected from the resident.
- **Balance:** This is the current open balance for the household and individual subjournal separate for both credits and charges. This column is totaled if you chose to include former residents in this report.

Occupancy Summary by Floor Plan

This section displays if you have chosen the **Summary** or **Summary + Details** report type. This lists each floor plan and provides occupancy and other information by floor plan.

- **Floor Plan:** This displays the floor plan information of the property in separate rows for each individual floor plan.
- **# of Units:** This displays the total number of units available in the respective floor plan.
- **Average Sq Ft:** This displays the average square footage available for an individual unit in the associated floor plan.
- **Average Market + Addl:** This displays the average market plus the sum of all non-rent charges and credits assigned to the floor plan in setup.
- **Average Amount/Sq Ft:** This displays the average amount divided by the square footage.
- **Average Leased:** This displays the average leased rent divided by the number of occupied units.
- **Lease Amount/Sq Ft:** This displays the average leased amount divided by the square footage for this floor plan.

- **Units Occupied:** This displays the total number of occupied units for this floor plan.
- **Occupancy %:** This displays the occupancy percentage for this floor plan.
- **Units Available:** This displays the number of vacant units for this floor plan.

Occupancy and Rents Summary for Current Date

- **Unit Status:** This displays the current status of the unit. Possible rows include:
  - **Occupied, No NTV:** This is a current resident.
  - **Occupied, NTV:** This is a current resident with notice to vacate.
  - **Occupied NTV Leased:** This is an NTV unit that is leased for applicants.
  - **Vacant Leased:** This is a vacant unit that is ready to be leased.
  - **Admin/Down:** This is a unit that is down for maintenance.
  - **Vacant Not Leased:** This is a vacant unit that is not ready for a lease.
- **Market:** This displays the total market rent. This column displays if you select the **Market** option when you generate the report.
- **Market + Addl:** This displays the total market rent plus the sum of all non-rent charges and credits assigned to the unit for the associated lease status. This column displays if you select the **Market + Addl** option when you generate the report.
- **# Units:** This is the total number of units for the associated lease status.
- **Potential Rent:** This displays the potential rent for the associated lease status.

Demographics Report

Unified Platform: ≡ Navigation Menu > Reports > Manage Reports > Reports tab > Residents/Student (Report Area) > Demographics

This is a custom report. See Managing Custom HTML Reports for more information about configuring custom reports.

The *Demographics* report is a customizable report that can provide Student Living demographics and roommate matching statistics. Lease and final account statement information can also be reported.

Student Living demographics are the questions your property uses to match students with other applicants or current residents who have similar preferences and habits. Roommate matching statistics pertain to roommate groups. You can report the roommate group ID and status, desired floor plan, maximum number of occupants allowed in the group, and other information. You can find the lease and account information on the **FAS** and **Lease Details** tabs on the **Account Profile** page.

On the report's **Options** page, you choose the fields that are reported, the column headings and positions, and the sort priority. Fields are grouped into folders or categories for easy selection.

This report is available for Student Living properties only.

Demographics Options

The *Demographics* report provides the following options used to select the information in the report and determine the report format.

Report Options

- **Generate Now:** To generate the report immediately, leave this option selected.
- **Schedule for Later:** To generate the report at a future date or time, select this option, and then perform the following:
  - Click the **Calendar** in the **Date** field, and then select the date you want to run the report.
  - Use the **Time** drop-down list to select the time when you want to generate the report. You can select any time of day in 30-minute increments.
- **Format:** Choose the report format. Available file types include:
  - **HTML Report:** To generate and view the report in HTML, select this option. See Viewing Completed Reports or Extracts for information on viewing an HTML report.
  - **Excel:** To generate the report as an XLS file, select this option. Reports generated as Excel files are downloaded to your device automatically when completed.

  - **CSV Export:** To generate the report as a CSV file, select this option. Reports generated in CSV format automatically download when completed.
- **Select Property:** Use this drop-down list to select the properties. You can scroll through the list or type a few characters of the property name in the **Search** field to find and select properties. Click the × **Clear** button in the **Search** field to type a new value. If you have access to only one property, the property is selected by default.
- **Send Email to External Recipient(s) upon Completion:** If you have the "External Report Distribution" right, you can type an email address in this field to send an email message to people outside of your organization. Use a semicolon to separate multiple email addresses. After the report is generated, an email message with a link to the report is sent.
- **Send Notification to Internal User(s) Upon Completion:** To send a notification to an internal user that the report is complete, use this drop-down list. You can select multiple users by selecting the check box beside each user you want to include.
- **Send File to Cloud Service upon Completion:** If you have the "External Report Distribution" right, you can use this drop-down list to select the cloud service account to which you want to send the report. After the report is generated, it is exported to the cloud service account's storage.

This is a custom report. See Managing Custom HTML Reports for more information about configuring custom reports.

Demographics Columns

Unified Platform: ≡ Navigation Menu > Reports > Manage Reports > Last Run Date > View Report

For *Demographics* reports, a column appears for each selected field. The column order is based on how the fields were listed from top to bottom in the **Edit Columns** pane on the report's **Options** page.

Required Columns

- **Lease ID:** This is the system-assigned lease ID that uniquely identifies the lease.
- **Guest Card ID:** This is the system-assigned guest ID that uniquely identifies the student.
- **Name:** This is the name of the student.

Lease Detail

The following columns show information found on the person's **Lease Information** tab on the **Lease Details** tab on the **Account Profile** page. The values reported are as of the current property date.

- **1st Advertising Source:** This is the first advertising source designated on the lease that made the resident aware of the property initially.

- **1st Installment Payment:** This element will be used for a future enhancement. Currently, this option has no functionality.
- **2nd Advertising Source:** This is the second advertising source (if any) on the lease.
- **Allow Partial Payments for the Household:** This is **Yes** if the property has activated this special/collection status for the resident. It overrides the global Payments setting, allowing the household to make partial payments on their deferred balance. Otherwise, the status is **No**.
- **Bill Resident Setup Fee:** This is **Yes** if the property bills the household a setup fee for utilities, based on the **Lease Information** page. Otherwise, the status is **No**.
- **Billing Date:** This date is the utility billing start date for the household.
- **Credit Optimizer Additional Deposit:** This option is valid if your property uses Screening with Credit Optimizer in conjunction with Performance Analytics. Credit Optimizer must be enabled and the **Advanced Settings** should be configured in Screening setup to **Enable Additional Deposit**. A Credit Optimizer additional deposit is then enabled only on the **Decision** page when an application has passed with conditions, and occupancy requirements for Credit Optimizer have been met. In other words, this option is available to applicants who would not normally have passed the screen, but passed due to the Credit Optimizer settings. In this instance, the additional Credit Optimizer deposits can be shown by selecting this column. This deposit usually uses a separate transaction code from normal Screening deposits, so that it can be tracked individually.
- **Credit Optimizer Additional Rent:** This option is valid if your property uses Screening with Credit Optimizer in conjunction with Performance Analytics. Credit Optimizer must be enabled and the **Advanced Settings** should be configured in Screening setup to **Enable Additional Rent**. The Credit Optimizer additional rent is then enabled only on the **Decision** page when an application has passed with conditions, and occupancy requirements for Credit Optimizer have been met. In other words, this option is available to applicants who would not normally have passed the screen, but passed due to the Credit Optimizer settings. In this instance, the additional Credit Optimizer rent amount can be shown by selecting this column.
- **Do Not Allow Check Payment:** This is **Yes** if the property no longer accepts check payments from this household (the option is selected in the **Special/Collection Status** box). Otherwise, this is **No**.
- **Do Not Allow Lease Renewal:** This is **Yes** if the property no longer allows you to renew the household's lease (the option is selected in the **Special/Collection Status** box). Otherwise, this is **No**.
- **Do Not Allow Money Order Payment:** This is **Yes** if the property no longer accepts money order payments from this household (the option is selected in the **Special/Collection Status** box). Otherwise, this is **No**.
- **Early Termination Fee:** This is the early termination fee on the household's **Lease Details** page. N/A indicates the property does not charge an early termination fee.

- **Equal Payments:** If the lease is set up for equal payments, this is **Yes**. For all other payment plans, this is **No**.
- **Eviction Proceedings Started:** This is **Yes** if the property has started eviction proceedings against the household, as selected in the account's **Special/Collection Status** box. Otherwise, the status is **No**.
- **FAS Status:** This is **None** for current residents and **Pending** or **Complete** for former residents, depending on whether the account is closed. The report shows all of the statuses if you select **N/A** in the drop-down list on the report's **Options** page.
- **Floor Plan:** This is the floor plan name.
- **Household ID/Resh ID:** This is the system-assigned household ID that displays on the person's **Lease Information** tab on the **Lease Details** tab on the **Account Profile** page.
- **Household Name:** This is the head of household name.
- **In Collection Status:** This is **Yes** if the property selected this option in the account's **Special/Collection Status** box. Otherwise, this is **No**.
- **Insufficient Notice Fee:** This is the insufficient notice fee amount that displays on the person's **Lease Information** tab on the **Lease Details** tab on the **Account Profile** page.
- **Late Method:** This is the late method assigned to this lease.
- **Lease Rent:** This is the total of all rent charges (CA types) in current scheduled billing in effect as of the report date.
- **Lease Rent Variance:** This is the lease rent variance. Calculated as:

  Next Lease Rent – Lease Rent

  This column is blank if there is no future renewal lease.
- **Lease Total:** This is the total of lease charges and credits. Calculated as:

  Lease Rent + Other Charges – Other Credits
- **Lease Total Variance:** This is the total lease variance. Calculated as:

  Next Lease Total – Lease Total

  If there is no future renewal lease, this column is blank.
- **Ledger Balance:** This is the total ledger balance for the household.
- **MTM Assessment Fee:** This amount is the month-to-month assessment fee if the lease expires with no renewal or N/A if the property charges no fee.
- **Next Lease Other Charges:** This is the total of all other charges (non-CA types) in future scheduled billing in effect as of the report date. If there is no future renewal lease, this column is blank.
- **Next Lease Other Credits:** This is the total of all other credits (non-CA types) in future scheduled billing in effect as of the report date. If there is no future renewal lease, this column is blank.
- **Next Lease Rent:** This is the total of all rent charges (CA types) in future scheduled billing in effect as of the report date. If there is no future renewal lease, this column is blank.

- **Next Lease Total:** This is: Next Lease Rent + Next Lease Other Charges – Next Lease Other Credits

  If there is no future renewal lease, this column is blank.
- **Next Lease Total Contract Value:** Currently, this option has no functionality.
- **NSF Fee:** This is the fee amount charged for NSF checks. The amount is determined by the transaction code designated for NSF fees in Unified Platform Settings.
- **Num. of Occupants:** This is the number of occupants responsible for paying utilities in the unit.
- **Occupancy Status:** This is the person's occupancy status as of the report date:
  - Applicant
  - Current resident
  - Former applicant (includes former applicants and canceled waitlist applicants)
  - Former resident
  - Pending resident (includes residents on-notice to transfer)
  - Waitlisted applicant

  If you entered a **Limit to as of Date** at report submission, the report reflects the person's occupancy status as of this date. For example, assume a resident transfers to a new unit on 5/10 but keeps the old unit until 5/11. If you limit the report to 5/10, the resident will be listed as a "Current resident" in both the old and new unit. If the resident transfers out of the old unit on 5/11 and you limit the report to this date, the resident will be listed as a "Former resident" under the old unit and a "Current resident" under the new unit. If you don't limit the date (so that the report is truly "as of" the current property date), the resident is listed as a "Current resident" under the new unit only.
- **Other Charges:** This is the total of all other non-rent charges (non-CA types) in scheduled billing as of the report date for the current lease.
- **Other Charges Variance:** If there is no next lease, this column is blank. Otherwise, this is calculated as:

  Next Lease Other Charges – Other Charges
- **Other Credits:** This is the total of all other non-rent credits (non-CA types) in scheduled billing as of the report date for the current lease.
- **Other Credits Variance:** If there is no next lease, this column is blank. Otherwise, this is calculated as:

  Next Lease Other Credits – Other Credits
- **Payment Agreement/Exclude from Collections:** This is **Yes** or **No**, based on whether the **Payment Agreement/Exclude from Collections** status is enabled in the **Special/Collection Status** box of a former resident or applicant. Since you can select the setting only for formers, this is always **No** for a current household in the report.

- **Preferred Floor Plan:** This is the applicant's preferred floor plan. If the applicant has not specified a preferred floor plan, then this column will be blank.
- **Preferred Unit #:** This is the applicant's preferred unit number. If the applicant has not specified a preferred unit, then this column will be blank.
- **Reason for Leasing:** This is the primary reason the resident chose to lease at the property.
- **Renewal End Date:** If the lease has been renewed, this is the end date of the renewal lease.
- **Renewal Start Date:** If the lease has been renewed, this is the start date of the renewal lease.
- **Required Notice:** This is the minimum number of days required for a household to provide a move-out notice.
- **Total Contract Value:** Currently, this option has no functionality.
- **Transfer to Unit:** Residents on notice to transfer will be listed twice in the report, once as a current resident, and again as a pending resident. The status affects the values that you will see in this column, and the **Unit #** column.
    - As a current resident, the number of the unit in which the resident currently lives appears in the **Unit #** column; the number of the unit the resident is transferring to appears in this column.
    - As a pending resident, the transfer to unit number appears in the **Unit #** column, and this column is "N/A."
- **Unit ID:** This is the system-assigned unit ID.
- **Unit #:** This is the unit number associated with the lease. For residents on notice to transfer (pending residents), this is the "transfer to" unit.
- **Unit Status:** This is the current status of the unit. If no status is assigned, this column will be blank. Possible statuses include:
    - **Assigned**
    - **Preferred**
    - **Committed**
- **Utility Start Date:** This lists each type of utility the resident pays and the date the resident became eligible to be billed by the utility.

Roommate Matching

- **Desired Floor Plan:** This is the preferred floor plan.
- **Desired Floor Plan ID:** This is the system-assigned floor plan ID number.
- **Group ID:** This is the system-assigned ID number for the roommate group.
- **Group Status:** This is the roommate group status:
    - **Complete:** The roommate group is complete and no roommate matching is needed. (The student unit count matches the maximum number of students that can live in the apartment, based on the floor plan associated with the apartment.)

  - **Partial:** The roommate group is incomplete; more roommate matching is needed to fill the apartment.
  - **Singles:** This is a waitlist applicant who is not part of a roommate group.
- **Max Student Group Occupants:** This is the maximum number of students that can live in the apartment. This number is set at the floor plan level.
- **Roommates:** This is the student's assigned roommates. When the report is generated, any assigned roommates will be displayed in this column.
- **Status:** This is the student's occupancy status (*Applicant*, *Resident*, *Waitlist*, *Former Resident*, and so on).
- **Student Group Has Unit Count:** For complete or partial roommate groups, this is the number of students in the group who have applied (applicants and waitlist applicants). For singles, this is 0 (zero).

Additional Unit Information

The following columns print unit information that displays on the **Change Rent Amounts by unit** page in unit setup.

- **Market + Addl.:** This is unit market rent plus additional charges. Calculated as:

  Base rent + Additional Charges and Credits + Unit Amenities
- **Market Rent:** This is the market rent. Calculated as:

  Base Rent + Unit Amenities
- **Other Unit Charges:** This is the total of all non-rent unit charges. (Non-rent is any charge with a non-CA type code).
- **Other Unit Credits:** This is the total of all unit credits.
- **Unit Rentable SQFT:** This is the unit rentable square footage.

Custom Fields

A column prints for each custom field that you selected for the report. The column heading is the field label and the field value is the information typed in the custom field on the household's "at a glance" page.

If you generated the report in the XML format, use the RealPage XML/CSV Decryption Utility to decrypt any field values that are encrypted. (In the **Custom fields** folder on the report parameters page, an encrypted field is identified with "(PII)," which indicates the field value contains personally identifiable information.) Refer to **Encryption, Custom Fields, and Reports** for more information.

Days Vacant Data Elements

The following columns print information for vacant units.

- **Days Since Previous Move Out:** This is the difference in days between the latest move-out date and the current lease move-in date.

- **Days Vacant and Off Market Before Move In:** This is the number of days vacant between the greater of the apply date or move-out date and the move-in date.
- **Max of Applied or Previous Move-Out Date:** This is the greater of the apply date or move-out date. For example, if a new resident applied for the unit on 7/1 and the move-out date on the unit is 7/7, this is 7/7.
- **Previous Move-Out Date:** This is the latest move-out date for the unit that is prior to the current lease move-in date.

  If there is no previous move-out date for the unit, this is blank, and the **Days Since Previous Move Out** will also be blank.

Final Account Statement

The following columns print information found on the **FAS** tab of the "at a glance" page. When reporting FAS fields, you should include the **Household Name** and **Unit Number** fields from the **Lease Detail** category.

- **FAS Balance:** This is the FAS balance.
- **FAS Date:** This is the date the account was closed.
- **FAS Forwarding Address:** This is the forwarding address entered at move-out or when the FAS was closed.
- **FAS Modify Date:** If the FAS was edited either through the undo or edit close account process, this is the date the FAS was modified.
- **FAS Notes:** These notes are generated by the system when a FAS is closed, modified, or reopened.
- **FAS Resident Notes:** These are any comments entered when the account was closed.
- **FAS Revision Reason:** This is the reason given when the FAS was edited either through the undo or edit close account process.
- **FAS Subjournal:** This is the subjournal name, if your property uses subjournals that require a final account statement.
- **FAS User:** This is the OneSite user that moved the household out or that last edited or closed the account.

General Demographics

The following column shows information for the head of household.

- **Age:** This is the head of household's age.

  To filter the report to show only people who are at least a certain age, select the field, select **Edit Column/Report Properties**, and then enter a number in the **Age Greater Than or Equal To** field. Leave the field blank to include everyone, regardless of age.

- **Gender:** This is the gender of the person. This is useful for generating roommate-matching reports.

General Information

The following columns show information for the contact who is the head of household.

- **Cell Phone:** This is the head of household's cell phone number.
- **Home Phone:** This is the head of household's home phone number.

  Opt In for Email Notifications: This field is available if your property has enabled **Email Notifications**. This column is Yes or No, based on whether the contact has opted in for email notifications (as selected on the contact's **General Information** tab).

  To filter the report to show only people who have or haven't opted in, select the field, select **Edit Column/Report Properties**, and then select "Yes" or "No." Leave "N/A" selected to include everyone.

- **Work Phone:** This is the head of household's work phone number.

Lease Summary

The following columns show information found on the person's **Lease Information** tab on the **Lease Details** tab on the **Account Profile** page. The values reported are as of the current property date.

- **Applied Date:** This is the lease application date.
- **Billing Address:** This is the billing address entered on the **Billing Information** tab of the head of household. The billing address can be the unit address or an alternate address.
- **Cancel/Deny Date:** For applicants, this is the date the lease application was canceled or denied.
- **Credit Approved By:** This is the OneSite user who approved the applicant's credit. For applicants, you can change this on the person's **Lease Information** tab on the **Lease Details** tab on the **Account Profile** page. For residents, you cannot change the information.
- **Credit Approved Date:** This is the date the credit was approved. For applicants, you can change this date on the person's **Lease Information** tab on the **Lease Details** tab on the **Account Profile** page. For residents, you cannot change the information.
- **Denial Reason:** This is the reason the lease application was denied, if applicable.
- **Deposit on Hand:** This is the unit deposit amount the person has paid.
- **Deposits Still Due:** This is the unit deposit amount still due.
- **Household Language:** This is the household's preferred language (if any). Your company must have chosen to display the preferred language and you must have selected a language for the household on the person's **Lease Information** tab on the **Lease Details** tab on the **Account Profile** page. Otherwise, this is blank.
- **Lease Approved By:** This is the OneSite user who approved the applicant's lease.
- **Lease Approved Date:** This is the date the lease was approved. For applicants, you can change this date by on the person's **Lease Information** tab on the **Lease Details** tab on the **Account Profile** page. For residents, you cannot change the information.

- **Lease End Date:** This is the lease end date.
- **Lease Signed Date:** This is the date the lease was signed.
- **Lease Start Date:** This is the lease start date.
- **Lease Term:** This is the lease term selected on the person's **Lease Information** tab on the **Lease Details** tab on the **Account Profile** page.
- **Leasing Consultant:** This is the leasing consultant associated with the lease.
- **Move-Out Notice Type:** If skip/break handling is enabled on the **Skip/Break Handling** page in RealPage Unified Platform, this indicates whether the person gave sufficient notice to move out, based on the most recent type selected when notice (or change notice) was given:
    - **Regular (notice):** The resident gave sufficient notice to vacate the unit.
    - **Skip:** The resident vacated the unit early without notice.
    - **Break:** The resident vacated the unit early, but legally (the lease allowed an early termination).

  If skip/break handling is enabled on the **Skip/Break Handling** page in RealPage Unified Platform, all notices are considered regular notices and this is blank. However, if your property enabled skip/break handling and later deactivated it, any notices selected as regular, skip, or break are reported as such in the report.
- **Move-Out Reason:** This is the reason selected when notice was given.
- **Move-In Date:** This is the move-in date.
- **Moved-Out Date:** This is the date the resident moved out.
- **Notice Given Date:** This is the date notice was given.
- **Required Deposit:** This is the deposit amount assigned to the floor plan or unit in Unified Platform Settings or overridden on the lease application.
- **Scheduled Move-Out (Date):** This is the scheduled move-out date if notice has been given.
- **Times Late:** This is the number of times the person has paid late.
- **Times NSF:** This is the number of times the person's check payment has been returned for insufficient funds.

Student Living Demographics

- **(Demographics):** This folder lists the default demographics fields provided by Student Living, plus any additional fields your property has defined. The default fields listed below may or may not be available at your property; this depends on whether your property uses them.
    - **Do you consider yourself to be above average in neatness?**
    - **Do you have pets?**
    - **Do you smoke?**
    - **My study habits are frequent.**

- **What are your sleeping habits?**
- **What is your classification?**

There is one additional field here that you can use.

- **Email:** This is the student's email address. If the student or applicant does not have an email address listed in OneSite, this column will be blank when the report is generated.

Lease Statistics Report

Unified Platform: ≡ Navigation Menu > Reports > Manage Reports > Reports tab > Residents/Student (Report Area) > Lease Statistics

The *Lease Statistics* report shows the number of residents who have applied for renewal using the online portal, as well as residents who have renewed in the office using OneSite. Using this report, properties can measure the effectiveness of online portal renewals and perform occupancy forecasting.

When you generate this report, the information is always generated for the next defined semester. For example, if you generate this report during the winter semester, the information in the report will be related to the spring semester (assuming that the spring semester is the next defined semester at your property). If you do not have a future-defined semester, this report will be blank. This report does not include month-to-month leases.

This report is available for Student Living properties only.

Lease Statistics Options

The *Lease Statistics* report provides the following options used to select the information in the report and determine the report format.

Report Options

- **Generate Now:** To generate the report immediately, leave this option selected.
- **Schedule for Later:** To generate the report at a future date or time, select this option, and then perform the following:
  - Click the **Calendar** in the **Date** field, and then select the date you want to run the report.
  - Use the **Time** drop-down list to select the time when you want to generate the report. You can select any time of day in 30-minute increments.
- **Format:** Choose the report format. Available file types include:
  - **Standard XML:** To generate the report as an XML file, select this option. See **Viewing Completed Reports or Extracts** for information on viewing an XML report.
  - **HTML Report:** To generate and view the report in HTML, select this option. See Viewing Completed Reports or Extracts for information on viewing an HTML report.
  - **Excel Export:** To generate the report as an XLS file, select this option. Reports generated in Excel format automatically download when completed.
  - **Standard CSV:** To generate the report as a CSV file, select this option.
- **Select Property:** Use this drop-down list to select the properties. You can scroll through the list or type a few characters of the property name in the **Search** field to find and select

properties. Click the × **Clear** button in the **Search** field to type a new value. If you have access to only one property, the property is selected by default.

- **Send Email to External Recipient(s) upon Completion:** If you have the "External Report Distribution" right, you can type an email address in this field to send an email message to people outside of your organization. Use a semicolon to separate multiple email addresses. After the report is generated, an email message with a link to the report is sent.
- **Send Notification to Internal User(s) Upon Completion:** To send a notification to an internal user that the report is complete, use this drop-down list. You can select multiple users by selecting the check box beside each user you want to include.
- **Send File to Cloud Service upon Completion:** If you have the "External Report Distribution" right, you can use this drop-down list to select the cloud service account to which you want to send the report. After the report is generated, it is exported to the cloud service account's storage.

Parameters

- **Sort By:** Use the drop-down list to select how you want to organize the detailed information.
  - **Floor plan:** If you choose this option, the signed leases in the *Details* section are organized by floor plan.
  - **Lease term:** If you choose this option, the signed leases in the *Details* section are organized by lease term.
- **Semester**: Use the drop-down list to select the time period that you want to generate the report for. Choose between the current semester or any future semester that is set up at your property. The report will include signed leases that have start dates within the selected semester. By default, the current semester is selected here.
- **Report Type:** Use the drop-down list to select the version of the report that has the level of information you require. Choose from the following options:
  - **Details + Summary:** If you select this option, then the report contains an overview that summarizes the total number of signed leases completed in the office and online, as well as detailed information about each signed lease. This option is selected by default.
  - **Summary Only:** If you select this option, then the report contains an overview that summarizes the total number of signed leases completed in the office and online.
  - **Details Only:** If you select this option, then the report contains a detailed listing of each signed lease and whether it was signed in the office or using an online portal.

Lease Statistics Columns

The report header shows the company and property name followed by the report title. The system date and time that you created the report are displayed at the left of the page, along with the options selected when generating the report. The report is divided into two sections, a summary of the lease statistics and a detailed listing of all signed leases for the selected semester.

Summary

- **Floor Plan:** The summary is organized by the student's floor plan in ascending order.
- **Total # of Signed/Accepted Leases:** This is the total number of signed leases for the associated floor plan during the semester you selected when you generated the report.
- **% of Floor Plan Leased:** This is the percentage of leases for the associated floor plan that have been signed.
- **# of Signed "In-Office" Leases:** This is the total number of signed leases for the associated floor plan that were signed in person in the office during the selected semester. This number does not include month-to-month leases.
- **# of Leases Accepted Online:** This is the total number of leases for the associated floor plan that were completed online during the selected semester. This number does not include month-to-month leases.
- **% of Leases Signed "In-Office":** This is the total percentage of leases signed in person during the selected semester. This percentage is expressed as:

  # of Signed "In-Office" Leases ÷ Total # of Leases
- **% of Leases Accepted Online:** This is the total percentage of leases completed online during the selected semester. This percentage is expressed as:

  # of Leases Accepted Online ÷ Total # of Leases

Details

- **Unit:** This is the current unit number.
- **Lease Term:** This is the current lease term.
- **Floor Plan:** This is the name of the floor plan associated with the unit.
- **Name:** This is the name of the applicant, waitlisted applicant, or resident.
- **Phone:** This is the phone number for the person. The number listed here is the first available from the following: home, mobile, work. For example, if a home number is unavailable, but a mobile number is, then the mobile number appears.
- **Lease Start:** This is the start date of the current lease that was signed or accepted during the selected semester.
- **Lease End:** This is the end date of the lease that was signed or accepted during the selected semester.
- **Move-in Date:** This is the student's move-in date.
- **Leasing Consultant:** This is the leasing consultant associated with the lease.
- **Lease Signed Date:** This is the date that the current lease was signed.
- **Total Contract Value:** This is the total value of the rental contract.

- **Unit Selection:** This indicates if the unit was selected online or in the leasing office. If the unit was selected online, then **Online** is displayed in this column. If the unit was selected in-person in the leasing office, then **Office** is displayed instead.
- **Lease Signed:** This indicates if the lease was signed online or in the leasing office. If the lease was signed online, then **Online** is displayed in this column. If the lease was signed in-person in the leasing office, then **Office** is displayed instead.

Occupancy Detail Forecast Report

Unified Platform: ≡ Navigation Menu > Reports > Manage Reports > Reports tab > Residents/Student (Report Area) > Occupancy Detail Forecast

The *Occupancy Detail Forecast* report lists all of your property units with their forecasted occupancy status for the current or future semesters based on scheduled returns, transfer, renewals, and move-outs. Generate this report to view the forecast based on the **Forecast as of Date** you defined for your property when you set up the semesters.

If you use the **Forecasted Sections** view when generating the report, you can group the units according to their forecast status. This arrangement lets you view the total units and the cumulative total of the leasing rent and scheduled billing per forecast status.

This report is available for Student Living properties only.

Occupancy Detail Forecast Options

The *Occupancy Detail Forecast* report provides the following options used to select the information in the report and determine the report format.

Report Options

- **Generate Now:** To generate the report immediately, leave this option selected.
- **Schedule for Later:** To generate the report at a future date or time, select this option, and then perform the following:
  - Click the **Calendar** in the **Date** field, and then select the date you want to run the report.
  - Use the **Time** drop-down list to select the time when you want to generate the report. You can select any time of day in 30-minute increments.
- **Format:** Choose the report format. Available file types include:
  - **Standard XML:** To generate the report as an XML file, select this option. See **Viewing Completed Reports or Extracts** for information on viewing an XML report.
  - **HTML Report:** To generate and view the report in HTML, select this option. See Viewing Completed Reports or Extracts for information on viewing an HTML report.
  - **Excel Export:** To generate the report as an XLS file, select this option. Reports generated in Excel format automatically download when completed.
  - **CSV Export:** To generate the report as a CSV file, select this option. Reports generated in CSV format automatically download when completed.
- **Select Property:** Use this drop-down list to select the properties. You can scroll through the list or type a few characters of the property name in the **Search** field to find and select properties. Click the × **Clear** button in the **Search** field to type a new value. If you have access to only one property, the property is selected by default.

- **Send Email to External Recipient(s) upon Completion:** If you have the "External Report Distribution" right, you can type an email address in this field to send an email message to people outside of your organization. Use a semicolon to separate multiple email addresses. After the report is generated, an email message with a link to the report is sent.
- **Send Notification to Internal User(s) Upon Completion:** To send a notification to an internal user that the report is complete, use this drop-down list. You can select multiple users by selecting the check box beside each user you want to include.
- **Send File to Cloud Service upon Completion:** If you have the "External Report Distribution" right, you can use this drop-down list to select the cloud service account to which you want to send the report. After the report is generated, it is exported to the cloud service account's storage.

Parameters

- **Semester:** Use the drop-down list to select the semester for the forecasted occupancy. If you have not created semesters, create them at the **Student Academic Years** page in **Residents Settings**. You cannot run the *Occupancy Detail Forecast* report until your property creates semesters.
- **Report View:** Use the drop-down list to select how you want to view the report.
  - **Forecasted sections:** In this view, the report is broken up into sections based on the categories in the **Forecast status** column. Sections include:
    - **Pre-lease occupied:** This section shows waitlisted students, pre-leased students, and applicants with assigned units who lease but move out within the forecasted semester.
    - **Pre-leased:** This section shows pre-leased students and applicants with assigned units who lease within the forecasted semester.
    - **Not expiring:** This section shows all leases that won't expire within the forecasted semester.
    - **Expirations:** This section shows all leases that expire within the forecasted semester.
    - **Renewals occupied:** This section shows leases that expire within the forecasted semester for students who "Renewed" their lease that won't end within the forecasted semester.
    - **Renewals expiring:** This section shows leases that expire within the forecasted semester for students who "Renewed" their lease that ends within the forecasted semester.
    - **Transfers:** This section shows leases that transfer within the forecasted semester.
    - **Returning occupied:** This section shows the leases of students who return and don't move out within the forecasted semester. This only refers to the pre-leased and applicant record created for the returning resident.

  - **Returning expiring:** This section shows the leases of students who return but move out within the forecasted semester. This only refers to the pre-leased and applicant record created for the returning resident.
- **Leased rent by floorplan:** In this view, all of the leases for the selected semester appear. This view organizes the leases based on unit type, and includes subtotals for each unit type. This view only shows renewals and leased units. The forecast statuses included in this view are renewals, transfers, returning occupied, pre-leased, pre-leased occupied, and not expiring.
- **Rent Roll:** In this view, all of the leases affecting the occupancy for the chosen semester appear in one section, ordered by unit number.

Occupancy Detail Forecast Columns

Unified Platform: ≡ Navigation Menu > Reports > Manage Reports > Last Run Date > View Report

Information appears in the following columns left to right on the page. Choosing the **Leased rent by floor plan** view divides the report into sections based on the floor plan type and subtotals the number of units and the lease rent. While choosing the **Forecasted sections** view will break the report into sections based on information in the **Forecast status** column, the columns listed below appear in the same order for both the **Forecasted sections** view and the **Rent roll** view.

- **Bldg/Unit:** This is the building and unit number.
- **Floor Plan:** This is the floor plan for the unit.
- **SqFt:** This is the square footage of the unit.
- **Forecast Status:** This is the lease status of the unit for the selected semester. Statuses include:
  - **Pre-lease Occupied:** This status applies to waitlisted students, pre-leased students, and applicants with assigned units who lease but move out within the forecasted semester.
  - **Pre-leased:** This status applies to pre-leased students and applicants with assigned units who lease within the forecasted semester.
  - **Not Expiring:** This status applies to all leases that won't expire within the forecasted semester.
  - **Expirations:** This status applies to all leases that expire within the forecasted term.
  - **Renewals Occupied:** This status applies to students with leases that expire within the forecasted semester who "Renewed" their lease that won't end within the forecasted semester.
  - **Renewals Expiring:** This status applies to students with leases that expire within the forecasted semester who "Renewed" their lease that ends within the forecasted semester.

   - **Transfers:** This status applies to leases that transfer within the forecasted semester.
   - **Returning Occupied:** This status applies to the leases of students who return and don't move out within the forecasted semester. This only refers to the pre-leased and applicant record created for the returning resident.
   - **Returning Expiring:** This status applies to the leases of students who return but move out within the forecasted semester. This only refers to the pre-leased and applicant record created for the returning resident.
- **Name:** This is the name of the resident.
- **Lease Start:** This is the start date of the lease affecting the forecasted occupancy.
- **Lease End:** This is the end date of the lease affecting the forecasted occupancy.
- **Market Rent:** This is the market rent for the unit as of the first day of the selected semester.
- **Lease Rent:** If the unit is leased, this is the amount of any CA-type charges, including rent, that are effective in the scheduled billing as of the first day of the selected semester. If there are no scheduled billing transactions, then the report displays the amount from the floor plan rate quote. Depending on setup configuration, this could be the low market rent or the high market rent for the floor plan type.
- **Other Charges/Credits:** If the unit is leased, this is the amount of any non-CA-type charges and/or credits that are effective in the scheduled billing as of the first day of the selected semester.
- **Total Billing:** This is the total of the lease rent combined with any other charges or credits.
- **Dep on Hand:** This is the total deposits on hand from the lease's deposit ledger.

Pre-Lease Goals vs Actuals Report

Unified Platform: ≡ Navigation Menu > Reports > Manage Reports > Reports tab > Residents/Student (Report Area) > Pre-Lease Goals vs. Actuals

The *Pre-Lease Goals vs. Actuals* report compares the pre-lease goals to the current activity and historical information, which you can use to forecast the amount of traffic and leases for upcoming semesters. During setup, you can specify pre-lease goals by semester. You can forecast a variety of lease data, including new leases, renewal leases, and traffic. This report charts your forecasted pre-lease goals against the current activity at your property. In addition, the report provides prior year actuals for additional historical data. Depending on the information that you require, you can choose one of five different views when you generate this report.

This report is available for Student Living properties only.

Pre-Lease Goals vs Actuals

The *Pre-Lease Goals vs. Actuals* report provides the following options used to select the information in the report and determine the report format.

Report Options

- **Generate Now:** To generate the report immediately, leave this option selected.
- **Schedule for Later:** To generate the report at a future date or time, select this option, and then perform the following:
  - Click the **Calendar** in the **Date** field, and then select the date you want to run the report.
  - Use the **Time** drop-down list to select the time when you want to generate the report. You can select any time of day in 30-minute increments.
- **Format:** Choose the report format. Available file types include:
  - **Standard XML:** To generate the report as an XML file, select this option. See **Viewing Completed Reports or Extracts** for information on viewing an XML report.
  - **PDF:** To generate the report as a PDF file, select this option. Reports generated as PDF files appear on a new browser tab when completed.
  - **Excel:** To generate the report as an XLS file, select this option. Reports generated as Excel files are downloaded to your device automatically when completed.
- **Select Property:** Use this drop-down list to select the properties. You can scroll through the list or type a few characters of the property name in the **Search** field to find and select properties. Click the ✕ **Clear** button in the **Search** field to type a new value. If you have access to only one property, the property is selected by default.
- **Send Email to External Recipient(s) upon Completion:** If you have the “External Report Distribution” right, you can type an email address in this field to send an email message to

people outside of your organization. Use a semicolon to separate multiple email addresses. After the report is generated, an email message with a link to the report is sent.

- **Send Notification to Internal User(s) Upon Completion:** To send a notification to an internal user that the report is complete, use this drop-down list. You can select multiple users by selecting the check box beside each user you want to include.
- **Send File to Cloud Service upon Completion:** If you have the “External Report Distribution” right, you can use this drop-down list to select the cloud service account to which you want to send the report. After the report is generated, it is exported to the cloud service account’s storage.

Parameters

- **Semester:** Use the drop-down list to select the time period that you want to generate the report for. Choose between past, current, or future semesters. The semesters are listed in descending order based on the semester start date, which places the most recent semesters at the top of the list. This field is required.
- **Goal Set:** Use the drop-down list to select a pre-lease goal for the semester. The list includes pre-lease goal sets created for the semester that you selected above. Specify a goal set after you select the semester. This field is required.
- **Report View:** Use the drop-down list to select the report view that you want to generate. This field is required. There are five possible options available:
    - **New Leases Goals vs. Actuals:** This view compares new leases goals to the actual amount of new leases generated during the pre-lease goal set, as well as the prior year actuals.
    - **Renewal Leases Goals vs. Actuals:** This view compares renewal lease goals to the actual amount of renewal leases generated during the pre-lease goal set, as well as the prior year actuals. Renewal leases include both current and returning residents, provided the returning residents have a selected unit or are pre-leased.
    - **Combined Leases Goals vs. Actuals:** This view compares combined leases goals to the actual amount of combined leases generated during the pre-lease goal set, as well as the prior year actuals. Combined leases include the total number of pre-leased applicants, applicants with assigned units, and renewal leases goals defined in the pre-lease goal set.
    - **Pre-Leased Occupancy % Goals vs. Actuals:** This view compares the percentage of pre-leased occupancy to the actual amount of pre-leased occupancy during the pre-lease goal set, as well as the prior year actuals. If you select this option, the **Present actuals as** setting is unavailable.
    - **Traffic Goals vs. Actuals:** This view compares traffic goals to the actual amount of traffic generated during the pre-lease goal set, as well as the prior year actuals.
- **Present Actuals:** Use the drop-down list to select how actuals are displayed in the report. Choose from the following options:

- **Cumulative:** If you select this option, the graph shows the combined leases goal, current actuals, and prior year actuals as a running total. This is the default selection.
- **Discrete:** If you select this option, the graph shows the actuals on a per interval basis.

Pre-Lease Goals vs Actuals Columns

When you generate this report as a PDF or Excel document, the report begins with a chart summarizing the data. Below the chart, information appears in columns from left to right on the page. Each goal interval defined in the pre-lease goal set appears as a separate row.

The report header shows the current system date and time that the report was generated, along with the property name and the name of the view. The *Parameters* section lists the parameters that you selected when you generated the report.

The report changes based on the view that you selected when generating the report. Each of the following views is discussed separately below:

- **New Leases Goals vs. Actuals:** This view compares new leases goals to the actual amount of new leases generated during the pre-lease goal set, as well as the prior year actuals.
- **Renewal Leases Goals vs. Actuals:** This view compares renewal leases goals to the actual amount of renewal leases generated during the pre-lease goal set, as well as the prior year actuals. Renewal leases include both current and returning residents, provided the returning residents have a selected unit or are pre-leased.
- **Combined Leases Goals vs. Actuals:** This view compares combined leases goals to the actual amount of combined leases generated during the pre-lease goal set, as well as the prior year actuals. Combined leases are comprised of pre-leased applicants, applicants with assigned units, and renewal leases.
- **Pre-leased Occupancy % Goals vs. Actuals:** This view compares the percentage of pre-leased occupancy to the actual amount of pre-leased occupancy during the pre-lease goal set, as well as the prior year actuals.
- **Traffic Goals vs. Actuals:** This view compares traffic goals to the actual amount of traffic generated during the pre-lease goal set, as well as the prior year actuals.

New Leases Goals vs. Actuals

At the top of this report (in Excel and PDF outputs), a line chart summarizes the content. This report is based on the date the unit was assigned to the applicant. The x-axis is segmented based on the goal interval defined in the pre-lease goal set. The y-axis is the number of new leases, up to fifty. Three data quantities are plotted in the chart:

- **New Leases Goal:** This blue dotted line shows the new leases goals specified by the selected pre-lease goal set.

- **New Leases Actual:** This red solid line shows the actual number of new leases gained during the goal interval. This line extends as far as the system date. Future date information is blank.
- **Prior Year Actual:** This green dashed line shows the actual number of new leases gained in the previous year.

Below the chart, additional data appears in the following columns:

- **Interval:** This is the goal interval date. A goal set may have multiple goal interval dates.
- **New Leases Goal:** This is the desired number of new leases gained during the goal interval. This is defined when the pre-lease goal is set up.
- **New Leases Actual:** This is the actual number of new leases (first-time leases) gained during the goal interval. These leases have a unit assigned or committed. Waitlisted applicants are counted as new leases for a specified period and semester after they are pre-leased.
- **New Leases Variance:** This is the **New Leases Actual** value minus the **New Leases Goal** value. Negative numbers are in parentheses.
- **Prior Year Actual:** This is the total number of new leases gained during the goal interval for the previous year.
- **Year Over Year Variance:** This is the **Prior Year Actual** value minus the **New Leases Actual** value. Negative numbers are in parentheses.

Renewal Leases Goals vs. Actuals

At the top of this report (in Excel and PDF outputs), a line chart summarizes the content. The x-axis is segmented based on the goal interval defined in the pre-lease goal set. The y-axis is the number of new leases, up to fifty. Three data quantities are plotted in the chart:

- **Renewal Leases Goal:** This blue dotted line shows the renewal leases goals specified by the selected pre-lease goal set.
- **Renewal Leases Actual:** This red solid line shows the actual number of renewal leases gained during the goal interval. This line extends as far as the system date. Future date information is blank. Renewal leases include both current and returning residents, provided the returning residents have a selected unit or are pre-leased.
- **Prior Year Actual:** This green dashed line shows the actual number of renewal leases gained in the previous year. Renewal leases include both current and returning residents, provided the returning residents have a selected unit or are pre-leased.

Below the chart, additional data appears in the following columns:

- **Interval:** This is the goal interval date. A goal set may have multiple goal interval dates.
- **Renewal Leases Goal:** This is the desired number of renewal leases gained during the goal interval. This is defined when the pre-lease goal is set up. Renewal leases include both current and returning residents, provided the returning residents have a selected unit or are pre-leased.

- **Renewal Leases Actual:** This is the actual number of renewal leases gained during the goal interval. Renewal leases include both current and returning residents, provided the returning residents have a selected unit or are pre-leased.
- **Renewal Leases Variance:** This is the **Renewal Leases Actual** value minus the **Renewal Leases Goal** value. Negative numbers are in parentheses.
- **Prior Year Actual:** This is the total number of renewal leases gained during the goal interval for the previous year. Renewal leases include both current and returning residents, provided the returning residents have a selected unit or are pre-leased.
- **Year Over Year Variance:** This is the **Prior Year Actual** value minus the **Renewal Leases Actual** value. Negative numbers are in parentheses.

Combined Leases Goals vs. Actuals

At the top of this report (in Excel and PDF outputs), a line chart summarizes the content. The x-axis is segmented based on the goal interval that is defined in the pre-lease goal set. The y-axis is the number of new leases, up to fifty. Three data quantities are plotted in the chart:

- **Combined Leases Goal:** This blue dotted line shows the combined leases goals specified by the selected pre-lease goal set. Combined leases include the total number of applicants with assigned units, pre-leased applicants, returning residents, and renewal leases goals defined in the pre-lease goal set.
- **Combined Leases Actual:** This red solid line shows the actual number of combined leases gained during the goal interval. This line extends as far as the system date. Future date information is blank. Combined leases include the total number of applicants with assigned units, pre-leased applicants, returning residents, and renewal leases gained.
- **Prior Year Actual:** This green dashed line shows the actual number of combined leases gained in the previous year.

Below the chart, additional data appears in the following columns:

- **Interval:** This is the goal interval date. A goal set may have multiple goal interval dates.
- **Combined Leases Goal:** This is the desired number of combined leases gained during the goal interval. Combined leases include the total number of applicants with assigned units, pre-leased applicants, returning residents, and renewal leases goals defined when the pre-lease goals were set up.
- **Combined Leases Actual:** This is the actual number of combined leases gained during the goal interval. Combined leases include the total number of applicants with assigned units, pre-leased applicants, returning residents, and renewal leases goals defined in the pre-lease goal set.
- **Combined Leases Variance:** This is the **Combined Leases Actual** value minus the **Combined Leases Goal** value. Combined leases include the total number of applicants with assigned units, pre-leased applicants, returning residents, and renewal leases goals defined in the pre-lease goal set. Negative numbers are in parentheses.

- **Prior Year Actual:** This is the total number of combined leases gained during the goal interval for the previous year.
- **Year Over Year Variance:** This is the **Prior Year Actual** value minus the **Combined Leases Actual** value. Negative numbers are in parentheses.

Pre-Leased Occupancy % Goals vs. Actuals

At the top of this report (in Excel and PDF outputs), a line chart summarizes the content. The x-axis is segmented based on the goal interval that is defined in the pre-lease goal set. The y-axis is the number of new leases, up to fifty. Three data quantities are plotted in the chart:

- **Pre-Leased Occupancy % Goal:** This blue dotted line shows the pre-leased occupancy percentage goals specified by the selected pre-lease goal set.
- **Pre-Leased Occupancy % Actual:** This red solid line shows the actual percent of pre-leased occupancy gained during the goal interval. This line extends as far as the system date. Future date information is blank.
- **Prior Year Actual:** This green dashed line shows the actual percentage of pre-leased occupancy gained in the previous year.

Below the chart, additional data appears in the following columns:

- **Interval:** This is the goal interval date. A goal set may have multiple goal interval dates.
- **Pre-Leased Occupancy % Goal:** This is the desired percentage of pre-leased occupancy during the goal interval.
- **Pre-Leased Occupancy % Actual:** This is the actual percentage of pre-leased occupancy during the goal interval.
- **Pre-Leased Occupancy % Variance:** This is the **Pre-Leased Occupancy % Actual** value minus the **Pre-Leased Occupancy % Goal** value. Negative numbers are in parentheses.
- **Prior Year Actual:** This is the total percentage of pre-leased occupancy gained during the goal interval for the previous year.
- **Year Over Year Variance:** This is the **Prior Year Actual** value minus the **Pre-Leased Occupancy % Actual** value. Negative numbers are in parentheses.

Traffic Goals vs. Actuals

At the top of this report (in Excel and PDF outputs), a line chart summarizes the content. This report is based on the creation date of the guest card. The x-axis is segmented based on the goal interval that is defined in the pre-lease goal set. The y-axis is the number of new leases, up to fifty. Three data quantities are plotted in the chart:

- **Traffic Goal:** This blue dotted line shows the traffic goals specified by the selected pre-lease goal set. This amount is the goal set for the total amount of traffic needed to generate the proposed new leases and renewals that you are forecasting.
- **Traffic Actual:** This red solid line shows the actual amount of traffic received during the goal interval. This line extends as far as the system date. Future date information is blank.

- **Prior Year Actual**: This green dashed line shows the actual amount of traffic received in the previous year.

Below the chart, additional data appears in the following columns:

- **Interval:** This is the goal interval date. A goal set may have multiple goal interval dates.
- **Traffic Goal:** This is the desired amount of traffic during the goal interval.
- **Traffic Actual:** This is the actual traffic generated during the goal interval.
- **Traffic Variance:** This is the **Traffic Actual** value minus the **Traffic Goal** value. Negative numbers are in parentheses.
- **Prior Year Actual:** This is the total amount of traffic gained during the goal interval for the previous year.
- **Year Over Year Variance:** This is the **Prior Year Actual** value minus the **Traffic Actual** value. Negative numbers are in parentheses.

Renewal Statistics Report

Unified Platform: ≡ Navigation Menu > Reports > Manage Reports > Reports tab > Residents/Student (Report Area) > Renewal Statistics

The Renewal Statistics report is a customizable report that shows the number of residents who have applied for renewal using the online portal and the number of residents who have applied for renewal in the office using OneSite. Using this report, properties can measure the effectiveness of online portal renewals and perform occupancy forecasting.

When you generate this report, the information is generated for the next defined semester. For example, if you generate this report during the winter semester, the information in the report will be related to the spring semester (assuming that the spring semester is the next defined semester at your property). If you do not have a defined future semester, this report will be blank. This report does not include month-to-month leases.

You can choose whether you want to order the *Details* section of the report by floor plan or lease term. You can also choose to include only signed renewals in the report.

This report is available for Student Living properties only.

Renewal Statistics Options

The *Renewal Statistics* report provides the following options used to select the information in the report and determine the report format.

Report Options

- **Generate Now:** To generate the report immediately, leave this option selected.
- **Schedule for Later:** To generate the report at a future date or time, select this option, and then perform the following:
  - Click the **Calendar** in the **Date** field, and then select the date you want to run the report.
  - Use the **Time** drop-down list to select the time when you want to generate the report. You can select any time of day in 30-minute increments.
- **Format:** Choose the report format. Available file types include:
  - **Standard XML:** To generate the report as an XML file, select this option. See **Viewing Completed Reports or Extracts** for information on viewing an XML report.
  - **HTML:** To generate and view the report in HTML, select this option. See Viewing Completed Reports or Extracts for information on viewing an HTML report.
  - **Excel:** To generate the report as an XLS file, select this option. Reports generated as Excel files are downloaded to your device automatically when completed.
  - **Standard CSV:** To generate the report as a CSV file, select this option.

- **Select Property:** Use this drop-down list to select the properties. You can scroll through the list or type a few characters of the property name in the **Search** field to find and select properties. Click the × **Clear** button in the **Search** field to type a new value. If you have access to only one property, the property is selected by default.
- **Send Email to External Recipient(s) upon Completion:** If you have the "External Report Distribution" right, you can type an email address in this field to send an email message to people outside of your organization. Use a semicolon to separate multiple email addresses. After the report is generated, an email message with a link to the report is sent.
- **Send Notification to Internal User(s) Upon Completion:** To send a notification to an internal user that the report is complete, use this drop-down list. You can select multiple users by selecting the check box beside each user you want to include.
- **Send File to Cloud Service upon Completion:** If you have the "External Report Distribution" right, you can use this drop-down list to select the cloud service account to which you want to send the report. After the report is generated, it is exported to the cloud service account's storage.

Parameters

- **Sort By:** Use the drop-down list to select how you want to organize the detailed information.
  - **Floor plan:** If you select this option, then the detailed section of this report is organized by the renewing resident's floor plan type.
  - **Lease term:** If you select this option, then the detailed section of this report is organized by the renewing resident's lease term.
- **Include Signed Renewals Only:** Activate the switch to include only signed renewals in the report.

Renewal Statistics Columns

The report header shows the company and property name followed by the report title and the selected semester. The system date and time that you created the report are displayed at the left of the page, along with the options selected when generating the report. The report is divided into two sections: a detailed listing of each renewal ordered by floor plan or lease term, followed by a summary.

Details

- **Unit:** This is the unit number.
- **Lease Term:** This is the current lease term.
- **Floor Plan:** This is the floor plan name.
- **Name:** This is the student's name.
- **Phone:** This is the phone number associated with the person. The phone number displayed in the report is based on the phone number(s) available in the student's contact

information. For example, if a home phone number is unavailable, the report displays the student's mobile phone number. If home and mobile phone numbers are unavailable, then the student's work phone number is displayed.

- **Email:** This is the email address associated with the person. The address displayed in the report is based on the address available in the student's contact information.
- **Lease Start:** This is the start date of the current lease.
- **Lease End:** This is the end date of the current lease.
- **Current Lease Rent:** This is the rent amount of the current lease.
- **Market Rent:** This is the current market rent of the unit.
- **(Renewal) Renewal Accepted:** This indicates if the renewal was accepted online or in the leasing office. If the renewal was accepted online, then "Online" is displayed in this column. If the renewal was accepted in-person in the leasing office, then Office is displayed instead.
- **(Renewal) Renewal Signed:** This indicates if the renewal was signed online or in the leasing office. If the renewal was signed online, then "Online" is displayed in this column. If the renewal was signed in-person in the leasing office, then Office is displayed instead.
- **(Renewal) Status:** This is the renewal status of the person in the unit. There are two possible values.
    - If this column contains **Pending Renewal**, then the students have selected a renewal offer online, but have not renewed their lease.
    - If this column contains **Renewed**, then the students have renewed their lease.
- **(Lease Offers) Lease Start:** This is the lease start date found on the renewal offer.
- **(Lease Offers) Increase:** This is the difference between the current lease price and the renewal lease price. If this number is negative (meaning that the lease price has decreased), the difference is enclosed in parentheses.
- **(Lease Offers) Lease Rent:** This is the renewal lease price from the renewal offer.
- **(Lease Offers) Term:** This is the new lease term from the renewal offer.

(Summary) by Floor Plan

- **Floor Plan:** This is the floor plan name.
- **Net Effective Rent Increase:** This is the difference between the total current lease price and the total renewal lease price for all of the leases of this floor plan that are expiring during the next defined semester. The lease price is comprised of the unit's base price, amenities, and concessions applied to the lease. If this number is negative (meaning that the lease price has decreased), the difference is enclosed in parentheses.
- **Leases Expiring:** This is the number of expiring leases for the associated floor plan during the next defined semester.
- **(Leases Renewed) OneSite:** This is the number of expiring leases that were renewed using OneSite for the next defined semester.

- **(Leases Renewed) Online:** This is the number of expiring leases that were renewed online using the portal for the next defined semester.
- **(Renewal Percentage) OneSite:** This is the percentage of expiring leases that were renewed using OneSite. This percentage can be defined as:

  (Leases Renewed) OneSite ÷ Total Number of Leases ×100
- **(Renewal Percentage) Online:** This is the percentage of expiring leases that were renewed online using the portal. This percentage can be defined as:

  (Leases Renewed) Online ÷ Total Number of Leases × 100
- **Total:** These are the summed totals for the columns listed above. Columns containing percentages are averaged together.

Summary by Lease Term

- **Lease Term:** This is the lease term.
- **Leases Expiring:** This is the number of expiring leases for the associated lease term during the next defined semester.
- **(Leases Renewed) OneSite:** This is the number of expiring leases that were renewed using OneSite for the next defined semester.
- **(Leases Renewed) Online:** This is the number of expiring leases that were renewed online using the portal for the next defined semester.
- **(Renewal Percentage) OneSite:** This is the percentage of expiring leases that were renewed using OneSite. This percentage can be defined as:

  (Leases Renewed) OneSite ÷ Leases Expiring × 100
- **(Renewal Percentage) Online:** This is the percentage of expiring leases that were renewed online using the portal. This percentage can be defined as:

  (Leases Renewed) Online ÷ Leases Expiring × 100
- **Total:** These are the summed totals for the columns listed above. Columns containing percentages are averaged together.

Rent Roll Detail Forecast Report

Unified Platform: ≡ Navigation Menu > Reports > Manage Reports > Reports tab > Residents/Student (Report Area) > Rent Roll Detail Forecast

The *Rent Roll Detail Forecast* report is a detailed summary of all of the units on your property for the current or future semesters. The report includes pre-leases, new and current leases, renewals, transfers, and expiring leases.

You can view the unit floor plan, forecasted occupancy status, market rent, and concession information.

For occupied units, the report lists the household name, forecast status, and lease dates. Scheduled billing charges are classified as lease rent and other charges. This report also shows the deposit on hand for the household and the current open balance as of the report date.

This report is available for Student Living properties only.

Rent Roll Detail Forecast Options

The *Rent Roll Detail Forecast* report provides the following options used to select the information in the report and determine the report format.

Report Options

- **Generate Now:** To generate the report immediately, leave this option selected.
- **Schedule for Later:** To generate the report at a future date or time, select this option, and then perform the following:
  - Click the **Calendar** in the **Date** field, and then select the date you want to run the report.
  - Use the **Time** drop-down list to select the time when you want to generate the report. You can select any time of day in 30-minute increments.
- **Format:** Choose the report format. Available file types include:
  - **PDF:** To generate the report as a PDF file, select this option. Reports generated as PDF files appear on a new browser tab when completed.
  - **Excel:** To generate the report as an XLS file, select this option. Reports generated as Excel files are downloaded to your device automatically when completed.
- **Select Property:** Use this drop-down list to select the properties. You can scroll through the list or type a few characters of the property name in the **Search** field to find and select properties. Click the × **Clear** button in the **Search** field to type a new value. If you have access to only one property, the property is selected by default.
- **Send Email to External Recipient(s) upon Completion:** If you have the "External Report Distribution" right, you can type an email address in this field to send an email message to

people outside of your organization. Use a semicolon to separate multiple email addresses. After the report is generated, an email message with a link to the report is sent.

- **Send Notification to Internal User(s) Upon Completion:** To send a notification to an internal user that the report is complete, use this drop-down list. You can select multiple users by selecting the check box beside each user you want to include.
- **Send File to Cloud Service upon Completion:** If you have the "External Report Distribution" right, you can use this drop-down list to select the cloud service account to which you want to send the report. After the report is generated, it is exported to the cloud service account's storage.

Parameters

- **Subproperty:** Use the drop-down list to filter the report based on subproperty. This drop-down list includes all subproperties set up at your property. If you want to include all units or if your property doesn't use subproperties, choose "All subproperties," the default option.
- **Subjournal:** Use the drop-down list to filter the report based on subjournals available for transactions. This drop-down list includes all subjournals set up at your property. When the report is generated, only transactions associated with the selected subjournal are included in the report. If you want to include all subjournals, choose "All," the default option.
- **Report Type:** Use the drop-down list to control the detail level of the report. By default, "Details + summary" is selected, but you can choose any of the following:
  - **Details + Summary:** This option includes all information including a high-level summary, and detailed rent roll information.
  - **Details:** Select this option to include only detailed rent roll information.
  - **Summary:** Select this option to include only a summary by floor plan, and a summary of billing by transaction code.
- **Semester:** Use the drop-down list to select the semester that you want to view in the report. You can choose from any current or future available semester.
- **Show Unit Rent As:** Use the drop-down list to control whether the amount reported for market rent includes additional charges. You can choose from the following options:
  - **Market rent:** This displays the CA and CK charges assigned to the unit in setup.
  - **Market + Addl.:** This displays the market rent, plus the sum of all non-rent charges and credits assigned to the unit in setup. This option is selected by default.
- **Sort By:** Use the drop-down list to choose how the system sorts the information in the *Rent Roll Detail Forecast* report. You can choose from three different sorting options:
  - **Unit:** To sort the report by unit number, select this option.
  - **Floorplan:** To sort the report by floor plan, select this option. Within each floor plan grouping, the units are sorted by unit number.
  - **Name:** To sort the report by resident name, select this option.

*When you choose **Name** as the sorting option, empty units are reported as Vacant or Vacant-Leased. These vacant units are listed after all of the named residents, at the bottom of the report.*

Rent Roll Detail Forecast Columns

Unified Platform: ≡ Navigation Menu > Reports > Manage Reports > Last Run Date > View Report

(Detailed Section)

- **Unit:** This is the unit number. If the applicant is waitlisted, "Waitlist" appears instead of a unit number. If the applicant is pre-leased, "Pre-lease" appears instead of a unit number. If the student is transferring to another unit, the old unit number appears in this field.
- **Floor Plan:** This is the floor plan associated with the unit. If the applicant is pre-leased, then this column shows the approved floor plan.
- **Forecast Status:** This is the lease status for the forecasted term. Statuses include:
    - **Pre-leased Expiring:** This status applies to waitlisted students, pre-leased students, and applicants with assigned units who will lease but will move out within the forecasted semester.
    - **Pre-leased Occupied:** This status applies to waitlisted students, pre-leased students, and applicants with assigned units who lease and will not move out within the forecasted semester.
    - **Expiring:** This status applies to current residents given a notice to vacate (NTV) or move out within the forecasted semester.
    - **Not expiring**: This status applies to current residents who won't move out within the forecasted semester. This also applies to month-to-month leases.
    - **Renewals expiring:** This status applies to leases that expire within the forecasted semester, or end on the gap between the previous and forecasted semester, where students have "Renewed" the lease that ends within the forecasted semester.
    - **Renewals occupied:** This status applies to leases that expire within the forecasted semester, or end on the gap between the previous and forecasted semester, where students have "Renewed" their lease that will not end within the forecasted semester.
    - **Returning expiring:** This status applies to leases with students who will return within the forecasted semester but will also move out within the forecasted semester. This only refers to the waitlist, pre-leased, and applicant record created for the returning resident. If the student will return, but not during the semester you are forecasting, then the system counts the lease as Pre-leased occupied or Pre-leased expiring.
    - **Returning occupied:** This status applies to leases with students who will return within the forecasted semester and won't move out within the forecasted semester. This only refers to the waitlist, pre-leased, and applicant record created for the returning

resident. If the student will return, but not during the semester you are forecasting, then the system counts the lease as Pre-leased occupied or Pre-leased expiring.

  - **Transfers:** This status applies to leases with students who transfer within the forecasted semester.

- **Name:** This is the last name and first name of the student in the unit.
- **Lease Term:** This is the number of months in the student's lease term.
- **Lease Start/End:** This is the start date and end date for the student's lease. If the student is pre-leased or waitlisted, then the lease start and end dates may not match the semester's start and end dates. If the student is transferring to another unit, the previous lease dates appear in this field.
- **Market + Addl.:** This is the market rent associated with the floor plan along with any additional (non-CA) charges. This column only displays if you chose **Show unit rent as Market + addl** in the report options. The sum of this column is totaled at the bottom of the detailed list.
- **Trans Code:** This displays the transaction code for the scheduled billing transaction. If there are multiple transaction codes, each displays on a separate line.
- **(Scheduled Billing) Mo Lease Rent:** This is the monthly lease rent that is assigned to the student in scheduled billing. If no unit exists, then this amount is either the low market rent or the high market rent for the base floor plan, based on setup configuration. If this amount is negative, it is displayed in parentheses. The sum of this column is totaled at the bottom of the detailed list.
- **(Scheduled Billing) Monthly Other Chgs/Credits:** This is the amount of all monthly non-rent charges and credits, plus any concessions in scheduled billing.
- **(Scheduled Billing) Non-Mo Conc:** This is the total amount for all non-monthly concessions. If this amount is negative, it is displayed in parentheses. The sum of this column is totaled at the bottom of the detailed list.
- **(Lease Total) Lease Value:** The sum of this column is totaled at the bottom of the detailed list. The value displayed here depends on the setup of your property. The value in this column is expressed as:

Monthly Rent + Charges – Credits × Number of Months in Lease Term

- **(Lease Total) Total Conc:** This is the total concession amount for the lease term. The sum of this column is totaled at the bottom of the detailed list. The value of this column is expressed as:

Monthly Concession Amount × Number of Months in Lease Term + Non-Monthly Concession Amount

- **Dep On Hand:** This is the total open deposit amount for the unit. The sum of this column is totaled at the bottom of the detailed list.
- **Balance:** This is the current open balance for the unit. The sum of this column is totaled at the bottom of the detailed list.

(Rent Analysis by Floor Plan)

- **Amt/SqFt: Market:** This is the total square footage for all units reported in the detailed section. This amount prints in the section title above the first column of the report. For example, if your property has three floor plans, the value in this column is expressed as:

(Average Sq Ft of Floor Plan 1 × Number of Units) + (Average Sq Ft of Floor Plan 2 × Number of Units) + (Average SqFt of Floor Plan 3 × Number of Units)

- **Floor Plan:** This is the floor plan code.
- **# Units:** This is the total number of units associated with this floor plan in setup.
- **Average SqFt:** This is the average rentable square footage for all units in this floor plan. Since all units inherit rentable square footage from the floor plan, this is not a true average.
- **Average Market + Addl.:** This is the average market rent plus the sum of all non-rent charges and credits assigned to units of this floor plan type.
- **Market Amt / SqFt:** This is the average market rent by square foot. This figure is expressed as: Average Market Rent ÷ Average SqFt
- **Average Leased:** This is the average rent for leased units in this floor plan. This amount is based on the CA-Rent scheduled billing charge for the unit. The value in this column is expressed as: Monthly Lease Rent Total of Leases with Unit Selected ÷ Number of Unique Units Selected and Included in the Report
- **Leased Amt / SqFt:** This is the average rent for leased units by the square footage. This can be expressed as: Average Leased ÷ Average SqFt

Summary Billing by Transaction code for Current Date (Monthly Charges Only*)

This table contains monthly charges only. Any non-monthly charges will not show as part of this summary.

- **Code:** This is the transaction code for scheduled billing transactions set up for current students.
- **Amount:** This is the total current scheduled billing amounts broken out by transaction code. This is the sum of the current scheduled billing for all current students at the property.

Returning Students Report

Unified Platform: ≡ Navigation Menu > Reports > Manage Reports > Reports tab > Residents/Student (Report Area) > Returning Students

Use the *Returning Students* report to access a list of the students who are returning for a later semester. For example, this report will show a student who is a resident during the spring semester and will be returning in the fall. The report also includes critical information, such as rent, deposit, and units.

You can use this report to help manage the make-ready process. To use this report as a forecasting tool, select a future semester. To use this report for historical data, select a previous semester. For additional flexibility, you can choose to generate the report based on move-in dates or move-out dates.

The results of this report are divided into information about the unit that the resident is moving from and moving to. Each section contains the unit number, semester, and deposit information.

This report is available for Student Living properties only.

Returning Students Options

The *Returning Students* report provides the following options used to select the information in the report and determine the report format.

Report Options

- **Generate Now:** To generate the report immediately, leave this option selected.
- **Schedule for Later:** To generate the report at a future date or time, select this option, and then perform the following:
  - Click the **Calendar** in the **Date** field, and then select the date you want to run the report.
  - Use the **Time** drop-down list to select the time when you want to generate the report. You can select any time of day in 30-minute increments.
- **Format:** Choose the report format. Available file types include:
  - **Standard XML:** To generate the report as an XML file, select this option. See **Viewing Completed Reports or Extracts** for information on viewing an XML report.
  - **HTML Report:** To generate and view the report in HTML, select this option. See Viewing Completed Reports or Extracts for information on viewing an HTML report.
  - **Excel Export:** To generate the report as an XLS file, select this option. Reports generated in Excel format automatically download when completed.
  - **CSV Export:** To generate the report as a CSV file, select this option. Reports generated in CSV format automatically download when completed.

- **Select Property:** Use this drop-down list to select the properties. You can scroll through the list or type a few characters of the property name in the **Search** field to find and select properties. Click the × **Clear** button in the **Search** field to type a new value. If you have access to only one property, the property is selected by default.
- **Send Email to External Recipient(s) upon Completion:** If you have the "External Report Distribution" right, you can type an email address in this field to send an email message to people outside of your organization. Use a semicolon to separate multiple email addresses. After the report is generated, an email message with a link to the report is sent.
- **Send Notification to Internal User(s) Upon Completion:** To send a notification to an internal user that the report is complete, use this drop-down list. You can select multiple users by selecting the check box beside each user you want to include.
- **Send File to Cloud Service upon Completion:** If you have the "External Report Distribution" right, you can use this drop-down list to select the cloud service account to which you want to send the report. After the report is generated, it is exported to the cloud service account's storage.

Parameters

- **Semester:** Use the drop-down list to select the appropriate semester that you want to generate the *Returning Students* report for. If you have not created semesters, create them on the **Student Academic Years** page in **Residents Settings**. The property must create semesters to run the *Returning Residents* report.
- **Base On:** Use the drop-down list to select how to calculate the *Returning Residents* report. Choose between the following:
  - **Move-Out Date:** If you choose this option, then the report is calculated based on students who have a move-out date in the selected semesters. This is the default selection.
  - **Move-In Date:** If you choose this option, then the report is calculated based on students who have a move-in date in the selected semesters.

Returning Students Columns

Information appears in the following columns from left to right on the page:

- **Name:** This is the student's name.
- **Moving From:** This section contains information about where the current student is moving from.
  - **Unit:** This is the student's current unit number.
  - **Move-Out:** This is the date that the student is scheduled to move out.
  - **Total Dep. Required:** This is the total deposit required for the current unit.
  - **Dep on Hand:** This is the total deposits on hand from the lease's deposit ledger.
- **Returning to:** This section contains information about where the student is returning to.

- **Unit:** If assigned, this is the unit number.
- **Semester:** This is the semester that the student is scheduled to return.
- **Move-In:** This is the student's expected move-in date.
- **Total Dep. Required:** This is the total deposit required for the unit that the student is returning to.

Roommate Matching Demographics Report

Unified Platform: ≡ Navigation Menu > Reports > Manage Reports > Reports tab > Residents/Student (Report Area) > Assigned Roommates

This is a custom report. See Managing Custom HTML Reports for more information about configuring custom reports.

Use the *Roommate Matching Demographics* report to match up prospects and waitlist applicants to roommates who have similar preferences and habits.

The report includes the person's name, occupancy status, desired floor plan, and roommate group status and ID. Demographic questions from the setup are available for selection. Each question represents a column in the report. You can rename the column headings with a shorter name if you do not want the entire question to appear as a heading in the report.

The report is customizable. It lets you choose the fields and column headings that are reported, the column positions, and the sort priority. You can also customize the report title.

You can generate the report in XML, HTML, Microsoft® Excel®, or CSV formats. Keep these guidelines in mind when printing the report.

- Each field represents a column in the report. The more fields selected to be shown in the report, the further out the columns will extend to the right of the page.
- You must determine whether portrait or landscape orientation is appropriate (based on the number of fields selected) and whether you need letter- or legal-sized paper.

This report is available for Student Living properties only.

HTML Report

If you generate the report in the HTML file format and view the report online, alternate row shading provides easier readability with the click of the mouse:

- Click a row to highlight it with a light blue color. Click the row again to restore it to its original color (not highlighted).
- Click a column header to highlight it with a light green color. Click the column again to restore it to its original color (not highlighted).
- Intersecting rows and columns have a third alternate highlight color (light orange).

The HTML report format is excellent for printing because column headings repeat on each page, and each page is numbered. However, because only a limited number of columns fit across the page, some do not print. (All column headings will be displayed when viewing the report online.) When generating an HTML report that you want to print, generate multiple versions and select different fields for each until you print all of the needed data.

CSV Report

This file format saves data with double quotes and comma-separated values. After running the report, you can choose to open or save the file. If you want double quotes, do not open the report in Excel. To ensure that the data is formatted with double quotes and comma-separated values, save the file to your personal computer or network location, and then open it in a text editor (such as Notepad).

When printing, the CSV report format requires more time for formatting as column headings print only on the first page of each "page set." For example, assume a report has 30 fields and ten fit on a single page. In the Excel output, the first ten column headings print on the first page, followed by a complete listing of data, which might cover several pages. After the last item, a new "page set" prints the next ten fields with column headings, followed by the data, and so forth. A row of data that prints on page 1 may continue on page 6 and finish on page 11. You may want to copy the row of column headings to those pages that have no headings and insert columns that contain key fields to subsequent pages that need them to ensure that the report clearly identifies the data. You can easily do this in **Page Break** preview.

Roommate Matching Demographics Options

The *Assigned Roommate* report provides the following options used to select the information in the report and determine the report format.

Report Options

- **Generate Now:** To generate the report immediately, leave this option selected.
- **Schedule for Later:** To generate the report at a future date or time, select this option, and then perform the following:
  - Click the **Calendar** in the **Date** field, and then select the date you want to run the report.
  - Use the **Time** drop-down list to select the time when you want to generate the report. You can select any time of day in 30-minute increments.
- **Format:** Choose the report format. Available file types include:
  - **Standard XML:** To generate the report as an XML file, select this option. See **Viewing Completed Reports or Extracts** for information on viewing an XML report.
  - **HTML Report:** To generate and view the report in HTML, select this option. See Viewing Completed Reports or Extracts for information on viewing an HTML report.
  - **Excel Export:** To generate the report as an XLS file, select this option. Reports generated in Excel format automatically download when completed.
  - **CSV Export:** To generate the report as a CSV file, select this option. Reports generated in CSV format automatically download when completed.

- **Send Email to External Recipient(s) upon Completion:** If you have the “External Report Distribution” right, you can type an email address in this field to send an email message to people outside of your organization. Use a semicolon to separate multiple email addresses. After the report is generated, an email message with a link to the report is sent.
- **Send Notification to Internal User(s) Upon Completion:** To send a notification to an internal user that the report is complete, use this drop-down list. You can select multiple users by selecting the check box beside each user you want to include.
- **Send File to Cloud Service upon Completion:** If you have the “External Report Distribution” right, you can use this drop-down list to select the cloud service account to which you want to send the report. After the report is generated, it is exported to the cloud service account’s storage.

This is a custom report. See Managing Custom HTML Reports for more information about configuring custom reports.

Roommate Matching Demographics Columns

For HTML and Excel reports, a column appears for each selected field. The columns are positioned from left to right on the page based on the column position number assigned to each column on the report’s **Options** page. The list below assumes that you included all available columns and does not necessarily represent the column order in your report.

- **Desired Floor Plan:** This is the floor plan selected on the guest card.
- **Group ID:** This is the system-assigned ID number for the roommate group. Students with the same group ID number are roommates.
- **Group Status:** This is the roommate group status.
  - **Complete:** The roommate group is complete, and no roommate matching is needed. (The maximum number of students associated with the floor plan of the unit has been reached.) The group can consist of prospects, applicants, and waitlist applicants, but it cannot consist of all prospects, as at least one member must have applied in order for the group to have a *Complete* status. Complete roommate groups that consist of all current residents and all applicants are excluded from the report.
  - **Partial:** This is a group of prospects, applicants, and waitlist applicants who are part of an incomplete roommate group. More roommate matching is needed to fill the unit. Partial roommate groups that consist of current residents are excluded from the report.
  - **Singles:** This is a waitlist applicant who is not part of a roommate group.
- **Name:** This is the student’s name.
- **Status:** This is the student’s occupancy status (prospect, applicant, or waitlist).
- **Desired Floor Plan ID:** This is the system-assigned floor plan ID number.
- **Guest Card ID:** This is the system-assigned guest card ID number.

- **Max Student Group Occupants:** This is the maximum number of students that can occupy the unit. The number is set at the floor plan level.
- **Student Group has Unit Count:** For complete or partial roommate groups, this is the number of students in the group who have applied (applicants and waitlist applicants). For singles, this is 0 (zero).
- **(Demographics):** The report can include the following demographics provided by Student Living, plus any custom demographics fields defined by your property.
  - **Do you consider yourself to be above-average in neatness?**
  - **Do you smoke?**
  - **My study habits are frequent?**
  - **What are your sleeping habits?**
  - **What is your classification?**
  - **What is your gender?**

Student Forecasted Rent Roll Detail Modified (Excel) Report

Unified Platform: ≡ Navigation Menu > Reports > Manage Reports > Reports tab > Residents/Student (Report Area) > Rent Roll Detail Forecasted Modified (Excel)

Use the *Student Forecasted Rent Roll Detail Modified – Excel* report to view detailed rent roll information and analyze unit detail information. You can view report data for a current or future semester.

This report is available for Student Living properties only.

Detailed Rent Roll

The *Detailed Rent Roll* section lists all units at your property for a current or future semester. This section of the report provides a complete list of the leases at your property, including pre-leases, new leases, current leases, renewals, transfers, and expiring leases. For each unit, the report provides the floor plan, forecasted occupancy status, market rent, and concession information. You can use this information for forecasting purposes. This section of the report also includes the unit/lease status, completed date, lease approved date, total monthly charges and credits, and gain/loss to lease.

For occupied units, the report lists the household name, contact information, forecast status, and lease dates. Scheduled billing charges are classified as lease rent and other charges. This report also shows the deposit on hand for the household and the current open balance as of the report date.

The *Detailed Rent Roll* section appears in the report when you select either the *Details + Summary* report type or the *Details* report type.

Summary

The report can also provide two summaries that analyze the unit detail information. If you choose to include the summary information, the report includes the following sections:

- **Rent Analysis by Floor Plan:** This section provides unit counts, average square feet, average market rent, market amount per square foot, average leased rent amount, and leased amount per square foot for each floor plan at the property.
- **Summary Billing by Transaction Code for Current Date (Monthly Charges Only*):** This section identifies the transaction codes to which the property's total scheduled billing amount is posted.

These sections appear in the report when you select either the *Details + Summary* report type or the *Summary* report type.

Student Forecasted Rent Roll Detail Modified (Excel) Options

The *Student Forecasted Rent Roll Detail Modified (Excel)* report provides the following options used to select the information in the report and determine the report format.

Report Options

- **Generate Now:** To generate the report immediately, leave this option selected.
- **Schedule for Later:** To generate the report at a future date or time, select this option, and then perform the following:
  - Click the **Calendar** in the **Date** field, and then select the date you want to run the report.
  - Use the **Time** drop-down list to select the time when you want to generate the report. You can select any time of day in 30-minute increments.
- **Format:** Choose the report format. Available file types include:
  - **Excel:** To generate the report as an XLS file, select this option. Reports generated as Excel files are downloaded to your device automatically when completed.
- **Select Property:** Use this drop-down list to select the properties. You can scroll through the list or type a few characters of the property name in the **Search** field to find and select properties. Click the ✕ **Clear** button in the **Search** field to type a new value. If you have access to only one property, the property is selected by default.
- **Send Email to External Recipient(s) upon Completion:** If you have the "External Report Distribution" right, you can type an email address in this field to send an email message to people outside of your organization. Use a semicolon to separate multiple email addresses. After the report is generated, an email message with a link to the report is sent.
- **Send Notification to Internal User(s) Upon Completion:** To send a notification to an internal user that the report is complete, use this drop-down list. You can select multiple users by selecting the check box beside each user you want to include.
- **Send File to Cloud Service upon Completion:** If you have the "External Report Distribution" right, you can use this drop-down list to select the cloud service account to which you want to send the report. After the report is generated, it is exported to the cloud service account's storage.

Parameters

- **Subproperty:** Use the drop-down list to select the subproperty you want to view in the report. This drop-down list includes all subproperties set up at your property. If you want to include all units or if your property does not use subproperties, select **All Subproperties**.
- **Subjournal:** Use the drop-down list to select the subjournal you want to view in the report. This drop-down list includes all subjournals set up at your property. When you generate the report, it will include only transactions associated with the selected subjournal. If you want to include all subjournals, select **All**.

- **Report Type:** Use the drop-down list to select the report's detail level. Choose from any of the following:
  - **Details + Summary:** Select this option to include the *Detailed Rent Roll* section, the *Rent Analysis by Floor Plan* section, and the *Summary Billing by Transaction Code for Current Date (Monthly Charges Only*)* section in the report.
  - **Details:** Select this option to include only the *Detailed Rent Roll* section in the report.
  - **Summary:** Select this option to include only the *Rent Analysis by Floor Plan* section and the *Summary Billing by Transaction Code for Current Date (Monthly Charges Only*)* section in the report.
- **Semester:** Use the drop-down list to select the semester that you want to view in the report. Choose from any current or future available semester.
- **Show Unit Rent:** Use the drop-down list to select whether the amount reported for market rent includes additional charges. Choose one of the following options:
  - **Market Rent:** This displays the CA and CK charges assigned to the unit in setup.
  - **Market + Addl.:** This displays the market rent plus the sum of all non-rent charges and credits assigned to the unit in setup. This option is selected by default.
- **Sort by:** Use the drop-down list to select how the system sorts the information in the *Forecasted Rent Roll Detail Modified* report. Choose from these sorting options:
  - **Unit:** Select this option to sort the report by unit number.
  - **Floor Plan:** Select this option to sort the report by floor plan. Within each floor plan grouping, the report sorts the units by unit number.
  - **Name:** Select this option to sort the report by resident name.

    When you choose **Name** as the sorting option, the report lists empty units as Vacant or Vacant-Leased. The vacant units appear at the bottom of the report after all of the named residents.

Student Forecasted Rent Roll Detail Modified (Excel) Columns

The columns available in the *Student Forecasted Rent Roll Detail Modified - Excel* report vary depending on which report type you select.

- **Details:** The *Details* report type includes only the *Detailed Rent Roll* section.
- **Summary:** The *Summary* report type includes only the *Rent Analysis by Floor Plan* section and the *Summary Billing by Transaction Code for Current Date (Monthly Charges Only*)* section.
- **Details + Summary:** The *Details + Summary* report type includes the *Detailed Rent Roll* section, the *Rent Analysis By Floor Plan* section, and the *Summary Billing by Transaction Code for Current Date (Monthly Charges Only*)* section.

Detailed Rent Roll

Information in the *Detailed Rent Roll* section appears in the following columns from left to right on the page. If you are viewing the Details + summary report type, then this information appears at the top of the report.

- **Resh ID:** This is the household's system-assigned identification number.
- **Lease ID:** This is the system-assigned lease identification number.
- **Unit:** This is the unit number. If the applicant is waitlisted, "Waitlist" appears instead of a unit number. If the applicant is pre-leased, "Pre-lease" appears instead of a unit number. If the student is transferring to another unit, the old unit number appears in this field.
- **Floor Plan:** This is the floor plan associated with the unit. If the applicant is pre-leased, then this column shows the approved floor plan.
- **Forecast Status:** This is the lease status for the forecasted term. Statuses include:
    - **Pre-leased Expiring:** This status applies to waitlisted students, pre-leased students, and applicants with assigned units who will lease but will move out within the forecasted semester.
    - **Pre-leased Occupied:** This status applies to waitlisted students, pre-leased students, and applicants with assigned units who lease and will not move out within the forecasted semester.
    - **Expiring:** This status applies to current residents given a notice to vacate (NTV) or move out within the forecasted semester.
    - **Not Expiring**: This status applies to current residents who won't move out within the forecasted semester. This also applies to month-to-month leases.
    - **Renewals Expiring:** This status applies to leases that expire within the forecasted semester or end on the gap between the previous and forecasted semester, where students have "Renewed" the lease that ends within the forecasted semester.
    - **Renewals Occupied:** This status applies to leases that expire within the forecasted semester or end on the gap between the previous and forecasted semester, where students have "Renewed" their lease that will not end within the forecasted semester.
    - **Returning Expiring:** This status applies to leases with students who will return within the forecasted semester but will also move out within the forecasted semester. This refers to the waitlist, pre-leased, and applicant record created for the returning resident. If the student will return, but not during the semester you are forecasting, then the system counts the lease as Pre-leased occupied or Pre-leased expiring.
    - **Returning Occupied:** This status applies to leases with students who will return within the forecasted semester and won't move out within the forecasted semester. This refers to the waitlist, pre-leased, and applicant record created for the returning resident. If the student will return, but not during the semester you are forecasting, then the system counts the lease as Pre-leased occupied or Pre-leased expiring.

    - **Transfers:** This status applies to leases with students who transfer within the forecasted semester.
- **Name:** This is the last name and first name of the student in the unit.
- **Phone:** This is the student's phone number. If the unit is vacant, then this column is blank.
- **Email:** This is the student's email address. If the unit is vacant, then this column is blank.
- **Lease Term:** This is the number of months in the student's lease term.
- **Lease Start:** This is the start date for the student's lease. If the student is pre-leased or waitlisted, then the lease start date may not match the semester's start and end dates. If the student is transferring to another unit, then the previous lease start date appears in this field.
- **Lease End:** This is the end date for the student's lease. If the student is pre-leased or waitlisted, then the lease end date may not match the semester's start and end dates. If the student is transferring to another unit, then the previous lease end date appears in this field.
- **Unit/Lease Status:** This is the lease status of the unit. For example, Vacant, Vacant–Leased, Applicant/Waitlist, Occupied, or Occupied–NTV.
- **Completed Date:** This is the date the applicant was pre-leased.
- **Approved Date:** This is the lease approval date.
- **Market Rent:** This is the market rent associated with the floor plan. This column displays if you chose **Show Unit Rent As – Market Rent** in the report options. The sum of this column is totaled at the bottom of the column.
- **Market + Addl.:** This is the market rent associated with the floor plan along with any additional (non-CA) charges. This column displays if you chose **Show Unit Rent As – Market + Addl** in the report options. The sum of this column is totaled at the bottom of the column.
- **Monthly Lease Rent:** This is the monthly lease rent that is assigned to the student in scheduled billing. If no unit exists, then this amount is either the low market rent or the high market rent for the base floor plan, based on the setup configuration. If this amount is negative, it is displayed in parentheses. The sum of this column is totaled at the bottom of the column.
- **Monthly Other Chgs/Credits:** This is the amount of all monthly non-rent charges and credits, plus any concessions in scheduled billing.
- **Non-Monthly Concession:** This is the total amount for all non-monthly concessions. If this amount is negative, it is displayed in parentheses. The sum of this column is totaled at the bottom of the column.
- **Lease Value:** The sum of this column is totaled at the bottom of the column. The value displayed here depends on the setup of your property. Calculated as:

  Monthly Rent + Charges – Credits × Number of Months in Lease Term
- **Total Concession:** This is the total concession amount for the lease term. The sum of this column is totaled at the bottom of the column. Calculated as:

Monthly Concession Amount × Number of Months in Lease Term + Non-Monthly Concession Amount

- **Total Monthly Charges and Credits:** This is the total of the monthly lease rent charges and credits. Calculated as:

  Monthly Lease Rent + Monthly Other Charges – Monthly Other Credits
- **Dep on Hand:** This is the total open deposit amount for the unit. The sum of this column is totaled at the bottom of the column.
- **Balance:** This is the current open balance for the unit. The sum of this column is totaled at the bottom of the column.
- **Gain/Loss to Lease:** The gain/loss is the difference between lease rent and market rent. For example: If the floor plan rent (plus any premium amenities) is $600 and the student rent (lease rent) is $500, then there is a loss to lease of $100, which would show as a negative amount. Likewise, If the floor plan rent is $600 and the student rent (lease rent) is $60, then there is a gain to lease of $50, which would show as a positive amount.
- **(Scheduled Billing Charges):** These are the student's scheduled billing charges, such as Cable or Alarm.

Rent Analysis by Floor Plan

Information in the *Rent Analysis by Floor Plan* section appears in the following columns from left to right on the page. If you are viewing the *Details + Summary* report type, then this information appears beneath the *Detailed Rent Roll* section. If you are viewing the *Summary* report type, then this information appears at the top of the report.

- **Amt/SqFt:Market:** This is the total square footage for all units reported in the detailed section. This amount prints in the section title above the first column of the report. For example, if your property has three floor plans, the value in this column is expressed as:

(Average Sq Ft of Floor Plan 1 × Number of Units) + (Average Sq Ft of Floor Plan 2 × Number of Units) + (Average SqFt of Floor Plan 3 × Number of Units)

- **Floor Plan:** This is the floor plan code.
- **Units:** This is the total number of units associated with this floor plan in setup.
- **Average SqFt:** This is the average rentable square footage for all units in this floor plan. Since all units inherit rentable square footage from the floor plan, this is not a true average.
- **Average Market + Addl.:** This is the average market rent plus the sum of all non-rent charges and credits assigned to units of this floor plan type.
- **Market Amt / SqFt:** This is the average market rent by square foot. This figure is expressed as:

  Average Market Rent ÷ Average SqFt
- **Average Leased:** This is the average rent for leased units in this floor plan. This amount is based on the CA-Rent scheduled billing charge for the unit. The value in this column is expressed as:

Monthly Lease Rent Total of Leases with Unit Selected ÷ Number of Unique Units Selected and Included in the Report

- **Leased Amt / SqFt:** This is the average rent for leased units by the square footage. This can be expressed as:

Average Leased ÷ Average SqFt

Summary Billing by Transaction Code for Current Date (Monthly Charges Only*)

The *Summary Billing by Transaction Code for Current Date (Monthly Charges Only*)* section contains monthly charges only. Any non-monthly charges will not be included in this summary.

Information in the *Summary Billing by Transaction Code for Current Date (Monthly Charges Only*)* section appears in the following columns from left to right on the page. This information appears beneath the *Rent Analysis by Floor Plan* Section.

- **Code:** This is the transaction code for scheduled billing transactions set up for current students.
- **Amount:** These are the total current scheduled billing amounts broken out by transaction code. This is the sum of the current scheduled billing for all current students at the property.

Unit Availability Forecast Report

RealPage Unified Login> ≡ Navigation Menu > Reports > Manage Reports > Residents/Student (Reports Area) > Unit Availability Forecast

The *Unit Availability Forecast* report provides a printed version of the **Unit availability forecast** snapshot. This report provides detailed information about available and unavailable units during a selected semester or time period.

When generating the report, you can choose whether you want the forecast to reflect students that have not given notice to vacate using the student's lease end date. You can also choose to include floor plans that are not counted in occupancy.

The *Unit Availability Forecast* report is divided into three main sections: *Available Units Forecast*, *Unavailable Units Forecast*, and *Remaining Waitlist not Affecting Availability*. The *Available Units Forecast* section lists any available units for the selected date range. The *Unavailable Units Forecast* section lists units that will be occupied during the selected date range. The third section, *Remaining Waitlist not Affecting Availability*, lists waitlisted applicants who do not affect the availability forecast.

This report is available for Student Living properties only.

Unit Availability Forecast Options

The *Unit Availability Forecast* report provides the following options used to select the information in the report and determine the report format.

Report Options

- **Generate Now:** To generate the report immediately, leave this option selected.
- **Schedule for Later:** To generate the report at a future date or time, select this option, and then perform the following:
  - Click the **Calendar** in the **Date** field, and then select the date you want to run the report.
  - Use the **Time** drop-down list to select the time when you want to generate the report. You can select any time of day in 30-minute increments.
- **Format:** Choose the report format. Available file types include:
  - **Standard XML:** To generate the report as an XML file, select this option. See **Viewing Completed Reports or Extracts** for information on viewing an XML report.
  - **HTML Report:** To generate and view the report in HTML, select this option. See Viewing Completed Reports or Extracts for information on viewing an HTML report.
  - **Excel Export:** To generate the report as an XLS file, select this option. Reports generated in Excel format automatically download when completed.

    - **CSV Export:** To generate the report as a CSV file, select this option. Reports generated in CSV format automatically download when completed.
- **Select Property:** Use this drop-down list to select the properties. You can scroll through the list or type a few characters of the property name in the **Search** field to find and select properties. Click the **Clear** button in the **Search** field to type a new value. If you have access to only one property, the property is selected by default.
- **Send Email to External Recipient(s) upon Completion:** If you have the "External Report Distribution" right, you can type an email address in this field to send an email message to people outside of your organization. Use a semicolon to separate multiple email addresses. After the report is generated, an email message with a link to the report is sent.
- **Send Notification to Internal User(s) Upon Completion:** To send a notification to an internal user that the report is complete, use this drop-down list. You can select multiple users by selecting the check box beside each user you want to include.
- **Send File to Cloud Service upon Completion:** If you have the "External Report Distribution" right, you can use this drop-down list to select the cloud service account to which you want to send the report. After the report is generated, it is exported to the cloud service account's storage.

Parameters

- **Include Activities During:** Use the drop-down list to select the format for the activities you want to view: Choose from the following options:
    - **Date range:** Select this option if you want to forecast an arbitrary date range and enter the **Start** and **End** dates.
        - **Activity Start Date:** Click the **Calendar**, and then select the beginning date of the report period.
        - **Activity End Date:** Click the **Calendar**, and then select the ending date of the report period. Items dated on or between the beginning and ending dates will be included in the report (as long as they meet the other parameter decisions made below).
    - **Semester:** Select this option to choose from any future semester that has been set up at your property. By default this option is selected.
        - **Semester:** Use the drop-down list to select a semester.
- **Include Lease End for Availability for Non-NTV:** Activate this switch if you want the forecast to reflect availability based on a student's lease end date, even if the student has not given notice to vacate. If this option is not selected, the availability forecast will not show non-NTV units as available, even if the date range is after the student's lease end date.
- **Include Floor Plans Not Counted in Occupancy:** Activate this switch to include floor plans that are not included in the occupancy in the unit availability forecast numbers for the report.

Unit Availability Forecast Columns

Unified Platform: ≡ Navigation Menu > Reports > Manage Reports > Last Run Date > View Report

This report is divided into three main sections.

Available Units Forecast

The *Available Units Forecast* section shows units that will not be occupied during the selected semester or date range. These are the columns displayed in the *Available Units Forecast* section of the report, from left to right.

- **Floor Plan:** This is the floor plan code for the available unit based on the date range selected on the parameter page.
- **Maximum Occupancy:** This is the maximum occupancy for the unit.
- **Unit:** This is the unit number.
- **Status:** This is the current status of the available unit. Possible statuses include Vacant ready, Vacant not ready, and Lease end. Lease end appear if you selected the **For non NTV, consider lease end for availability** check box when generating the report.
- **Date Available:** This is the date that the unit will become available.

Unavailable Units Forecast and Remaining Waitlist not Affecting Availability

The *Unavailable Units Forecast* section shows units that are unavailable during the selected semester or date range, while the *Remaining Waitlist not Affecting Availability* section shows waitlisted applicants who do not affect unit availability during the selected semester or date range. These are the columns displayed in the *Unavailable Units Forecast* and the *Remaining Waitlist not Affecting Availability* sections of the report, from left to right.

- **Floor Plan:** This is the floor plan code for the unit.
- **Maximum Occupancy:** This is the maximum occupancy for the unit.
- **Unit:** This is the unit number.
- **Waitlist:** This column is displayed only in the *Unavailable Units Forecast* section. If the student is on a waitlist, this column displays Yes. Otherwise, this column is blank.
- **Lease Begin:** This is the start date of the student's lease.
- **Lease End:** This is the end date of the student's lease.
- **Last Name:** This is the last name of the student.
- **First Name:** This is the first name of the student.
- **Gender:** This is the student's gender.

