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# **Beginner Training – Introduction**

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| **Module** | Logging In Logging Out of Chintaro Cloud |
| **Learning Outcome** | At the end of this module, you will be able to log in and out of Chintaro. |
| **Content Covered** | * Logging into Parallels (connection set up) * Logging into Chintaro (username/password set up) * Checking System Administrators * Exiting Chintaro * Disconnecting/Logging off Parallels |

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| **Module** | Logging in and logging out of Chintaro Local |
| **Learning Outcome** | *At the end of this module, you will be able to log in and out of Chintaro.* |
| **Content Covered** | * Logging into Chintaro (username/password set up) * Checking System Administrators * Exiting Chintaro |

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| **Module** | Chintaro Terminology |
| **Learning Outcome** | At the end of this module, you will be able to use Chintaro terminology. |
| **Content Covered** | Explains:   * Client * Household * Primary Tenant * Tenancy * Property * Program * Room (single household/shared housing) |

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| **Module** | Navigating around Chintaro |
| **Learning Outcome** | At the end of this module, you will be able to navigate your way around Chintaro. |
| **Content Covered** | * Toolbar * Main Menu * Basic searching (search by blue quick find columns: Surname, Given Name, Known as Name, Property Name) * ‘Manage’ /Search Screens * Back button |

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| **Module** | Getting Help with Chintaro |
| **Learning Outcome** | At the end of this module, you will be able to access the Knowledge Base and know how to contact Chintaro Support for personalised assistance. |
| **Content Covered** | * User Manual/Knowledge Base * Emailing Chintaro Support (description, screenshot, file if applicable) * Chintaro Support Service Level Agreement * Support in Main Menu including phone number to call if urgent |

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| **Module** | How to enter data before training **\*\*For a new Chintaro implementation only** |
| **Learning Outcome** | At the end of this module, you will know how to set up the programs, or different streams of housing of your business, as well as how to add your Clients, Tenancies and Properties to the system. |
| **Content Covered** | * Adding Programs * Adding Clients * Adding Property * Adding Room * Create Tenancy with Opening Balance * Adding Inventory Item * Adding Tradespeople |

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| **Module** | Navigating your converted data before training **\*\*For a new Chintaro implementation only** |
| **Learning Outcome** | At the end of this learning module you will learn how to access your clients, properties (with rooms), tenancies (with rent records and transaction ledgers), maintenance tasks and tradespeople. |
| **Content Covered** | * Accessing Clients * Accessing Properties and Rooms * Accessing Tenancies with rent records and transaction ledgers * Accessing Maintenance information |

# **Beginner Training – Managing Tenancies**

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| **Module** | Creating a Tenancy (AUS) |
| **Learning Outcome** | At the end of this module, you will be able to add a client and create a new Tenancy in Chintaro |
| **Content Covered** | * Search Clients * Add Client (Given and Surname, Date of Birth, CRN, Phone Number) * Creating Household/Linking Related Tenants * Create Tenancy: What (Room): VT/VUT Rooms   When (Tenancy Start Date): first day of charge  How Much (Rent Record): history of charges, closing off old record, adding new line, Market Rent   * Setting up Payment Arrangements |

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| **Module** | Creating a Tenancy (NZ) |
| **Learning Outcome** | At the end of this module, you will be able to add a client and create a new Tenancy in Chintaro |
| **Content Covered** | * Search Clients * Client Screen: Add Client (Given and Surname, Date of Birth, WINZ, Phone Number) * Creating Household/Linking Related Tenants * Create Tenancy: What (Room): VT/VUT Rooms   When (Tenancy Start Date): first day of charge  How Much (Rent Record): history of charges, closing off old record, adding new line, Market Rent   * Setting up Payment Arrangements |

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| **Module** | Managing a Tenancy: Tenancy Financials |
| **Learning Outcome** | At the end of this module, you will be able to navigate around the financials of a Tenancy including the Tenancy Ledger, finding the Rent Paid To date, view current arrangements and accessing bond information. |
| **Content Covered** | * Tenancy Screen: Rent Record (Edit Rent): Where ongoing charges come from * Tenancy Ledger: Date, Comments, Amount, Transaction Group, Running Balance * Balances: Total and Transaction Group * Rent Paid To function * Payment Arrangements: only mentions function that splits payments, no set up * Bond Transactions: only references where held, not how they’re set up |

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| **Module** | Managing a Tenancy: Communicating with Tenants |
| **Learning Outcome** | At the end of this module, you will be able to communicate with individual tenant or multiple Tenants via SMS, Email and Letters |
| **Content Covered** | * Tags and Alerts * Sending an Individual SMS/ Sending an Individual Email * Creating an individual Word Merge * Client Notes: Creating manually and system generated (Create Client Note box ticked) * Bulk Communication screens (Tenancy SMS, Tenancy Letters, Tenancy Email) |

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| **Module** | Managing a Tenancy: Arrears Management |
| **Learning Outcome** | At the end of this module, you will be able to create Arrears Actions or communicate with a single Tenancy in Arrears or multiple Tenants in Arrears in bulk. |
| **Content Covered** | * Tenancy Screen – Arrears indicators (Active Arrears, Balance, Running Balance) * Adding an Arrears Action from Tenancy screen: arrears action box * Adding Notes * Arrears Management screen: filtering by Days * Filtering by Tenancy Manager, Program, Region * Appling Arrears Action: SMS, Word Merge (Repayment Plan) |

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| **Module** | Managing a Tenancy: Scheduling recurring dates |
| **Learning Outcome** | At the end of this module, you will be able to schedule recurring dates for a Tenancy and report on upcoming important dates. |
| **Content Covered** | * Adding Lease Expiry, Next Inspection Date and Next Rent Review Date * Saved Views to create reports |

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| **Module** | Managing a Tenancy: Statements |
| **Learning Outcome** | At the end of this module, you will be able to produce a statement of tenancy transactions for both one tenancy and multiple Tenants in bulk. |
| **Content Covered** | * Print Statement: Covers Client, Rent/Non-Rent, SACAT, NSW, Transaction Group * Optional Statement Text * Create Client Note * Bulk Print Statements/ Bulk Email Statements |

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| **Module** | Managing a Tenancy: Vacating a Tenancy |
| **Learning Outcome** | At the end of this module, you will be able to vacate a tenancy record and find vacated tenancies from search screens. |
| **Content Covered** | * Tenancy screen: Reversing rent back by generating backwards * Adding a CR Rent ADJ if rent overcharged * Vacate details (minus Vacancy Processing) * Vacated Details on Tenancy Screen (Vacated Date/Exit Point/Leaving Reason) |

# **Beginner Training – Managing Finance**

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| **Module** | Managing Rents: Creating Charges |
| **Learning Outcome** | At the end of this module, you will be able to generate fortnightly charges for individual and all tenant in bulk |
| **Content Covered** | * Tenancy rent record (weekly amounts) * Tenancy Transactions (overview) * Generate Rent (from Tenancy screen): forwards/backwards * Generate Rent > Bulk * Entering Transactions Manually in the tenancy screen |

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| **Module** | Managing Rents: Receipting Payments (AUS) |
| **Learning Outcome** | At the end of this module, you will be able to import batch payments for tenants in bulk (both Centrepay and bank statements), enter payments manually in bulk and create payment transactions for individual tenancies. |
| **Content Covered** | * Client screen > CRN * Multi Bank Processing 2 line * Importing Centrepay file > payments * Manually allocating payments from Centrepay file * $0.99c fee for each transaction * Importing Bank Statements * Payment Book ID on Tenancy * View Bank Accounts (2 line) * Allocating Unallocated Payments from Bank Account screen * Manual Bank Processing 2 line: Manually entering bulk payments * Tenancy Screen > Enter Transaction * Print Receipt from Tenancy screen Transaction |

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| **Module** | Managing Rents: Receipting Payments (NZ) |
| **Learning Outcome** | At the end of this module, you will be able to import batch payments for tenants in bulk, key in bank payments in bulk and create manual payments for individual tenancies |
| **Content Covered** | * Work and Incomes number on Tenancy * Importing Bank Statements * Payment Book ID on Tenancy * View Bank Accounts (2 line) * Allocating Unallocated Payments from Bank Account screen * Manual Bank Processing 2 line: Manually entering bulk payments * Tenancy Screen > Enter Transaction * Print Receipt from Tenancy screen Transaction |

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| **Module** | Day to Day Finance Reporting |
| **Learning Outcome** | At the end of this module, you will be able to run reports and exports regarding finance. |
| **Content Covered** | * Tenancy Balances screen * Saved Views – Hide/Unhide columns * Screen filtering: Program, tenancy manager, exporting * Manage Tenancy Splits screen * Manage Tenancy Transactions screen * Batch numbers (batch and batch rent) * Reports and Exports > Finance |

# **Beginner Training – Managing Properties**

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| **Module** | Managing a property: Property Configurations and Rooms |
| **Learning Outcome** | At the end of this module, you will be able to identify between different property configurations in Chintaro, navigate around Rooms and change a Room Status manually. |
| **Content Covered** | * Manage Properties – filtering * Property screen overview (sections of screen) * Difference between single tenancy in property vs shared accommodation * Viewing Room Details: Occupancy History, Room Rate Record * Changing a Room to Vacant Untenantable * Changing a Room to Vacant Tenantable * Manage Rooms screen |

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| **Module** | Managing a property: Inventory and Assets |
| **Learning Outcome** | At the end of this module, you will be able to find a property’s inventory, add a new Inventory item to a property and view all property inventory from one screen. |
| **Content Covered** | * Property Screen: Inventory Items * Add Inventory Item: Item Name, Serial Number, Condition, Trade Type, Maintenance Type, Urgency, Estimated Amount * Adding a Cyclical Maintenance Task * Manage Inventory Items screen |

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| **Module** | Creating Maintenance Tasks and Work Orders |
| **Learning Outcome** | At the end of this module, you will be able to raise a Maintenance Task and send a Work Order from Chintaro. |
| **Content Covered** | * Add Maintenance Task (toolbar) * Add Maintenance Task: Inventory Item, Maintenance Type, Trade Type, Instructions, Access Instructions * Send Work Order To – Email * Home Screen > Incomplete Maintenance Tasks |

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| **Module** | Managing Open Maintenance Tasks and Work Orders |
| **Learning Outcome** | At the end of this module, you will be able to search for open tasks, make notes to update the task, communicate with Tradespeople or Tenants from the task and report on outstanding maintenance. |
| **Content Covered** | * Home Screen > Incomplete Maintenance Tasks * Status * Filtering Manage Maintenance Tasks screen for reporting * Adding Maintenance Notes with progress * SMS Tenant from Task * Default Messages (set up in System Maintenance) * Saved Views for reporting |

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| **Module** | Closing Maintenance Tasks and Work Orders |
| **Learning Outcome** | At the end of this module, you will be able to close a Maintenance Task, add a property transaction to allocate the cost of the job, add notes to properties relating to maintenance and search for completed maintenance tasks in various locations. |
| **Content Covered** | * Filtering Manage Maintenance Tasks screen to open active job * Completion/Forecast details: Actual Completion Date, Invoice Number, Actual Cost * Create property transaction * Create Property Note * Property screen > Maintenance tab * Property Transactions ledger * Property notes * Saved Views |

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| **Module** | Alerts, Notes and Links |
| **Learning Outcome** | At the end of this module, you will be able to add or edit property tags and alerts, add and view property notes, create action notes for follow up and add and open related links. |
| **Content Covered** | * Tags (adding/removing) * Alerts (adding/removing) * Notes (Property notes and Action notes) * Related Links (Adding) |

# **Beginner Training – Managing Operations**

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| **Module** | System Administration: User Management |
| **Learning Outcome** | At the end of this module, you will be able to add a new user to the system, assign a user to a user role, reset a user's password, and delete access for a user who no longer requires access to Chintaro. |
| **Content Covered** | * System Maintenance > Security * Add User * Changing User Roles * Changing Passwords * Deleting User |

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| **Module** | System Administration: System Management |
| **Learning Outcome** | At the end of this module, you will be able to add or edit existing drop down lists and set system preferences for how you want Chintaro to behave. |
| **Content Covered** | * Editing Reference Tables * Setting Preferences |

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| **Module** | Reporting: Occupancy |
| **Learning Outcome** | At the end of this module, you will be able to generate the necessary calculations for occupancy reporting and produce occupancy reports and exports*.* |
| **Content Covered** | * Occupancy Calculation * Reports * Exports * Statutory Reporting Analyser |