

RE Manuals/LandlordSource Owner, Tenant, & Vendor Manual Outlines

The following pages have the three outlines for the Owner, Tenant, and Vendor Manuals. Please note the following:

- All have built-in Table of Contents. After modifying the manual, right clicking on the Table of Contents will automatically update it.
- Each manual comes with 9 additional forms – a total of 27 forms in all. The majority of these forms are not contained in the *RE Manuals/LandlordSource Forms, Letters, and Agreements, 2nd Edition*.
- There are product instructions included when purchased to facilitate converting the manuals to your company manual.
- All documents can be modified – you can add, delete, or simply modify the text.

RES Owner Manual Outline

Table of Contents

Welcome

Company Information

 Mission statement

 Principals

 Communication

 Company communication

 Website

General office information

 Address information

 Communication

 Office Hours

 Emergencies

 Monthly newsletter

Personnel and contact information

 Staff/personnel

 Owner communication

 Email

 Owner vacation notice

 Owner Responsibilities

The Scope of Property Management

 What is included in Property Management Services?

 What is not included in Property Management Services?

Company Policies

 Department of real estate requirements

 Code of ethics

 Drug-free policy

 Legislation

 Lead-based paint

 Mold issues

Answers Regarding Funds

 Banking

 Monthly statements

 Disbursement of monthly funds

- Renting Your Property
 - Preparing to rent the property
 - Setting the rent
 - How long will the property be vacant?
 - Advertising/Marketing
 - Publications/newspapers
 - Internet/website
 - Vacancy mailbox system
 - Signage
- Showings and applications
 - Processing Tenant Applications
 - Tenant screening
 - Cosigners
 - Pets
 - Service animals
- The Tenant Move In
 - Rent and security deposits
 - Rental/lease agreements Walk-through
 - Tenant handbook
 - Tenant education and preparation
- Working with Your Tenants
 - Collecting rent
 - Notice to pay or quit
 - Other notices
 - Tenant problems
 - Legal action
 - Maintenance
 - Preventative maintenance
 - Emergencies/Disaster
- When the Tenant Vacates
 - Notice to vacate
 - Communication with owners and tenants
 - Tenant move out
 - Security deposit refunds
 - Collections
- Additional Services
 - Referrals
 - Annual survey/inspection
 - Supervision of extraordinary maintenance
 - Eviction protection plan
 - Real Estate services
- Cancellation of Management
 - Written notice
 - Notice to current tenants
 - Distribution of documents
 - Final distribution of funds
- Conclusion

Owner Forms Included

1. Owner Information
2. Electronic Banking Authorization – ACH form
3. Mortgage Authorization
4. Utility Authorization
5. Insurance Authorization
6. Change of owner inform
7. Owner Work Request/Authorization
8. Owner Vacation Notice

Tenant Manual Outline

Table of Contents

Welcome

Company Personnel

Tenant Communications

Telephone calls during office hours

Voice mail

After hour calls

Emergency calls

Maintenance requests

Change of Information

Email

Website

General Office Information

Address information

Telephone

Internet

Office Hours

Emergency Information

Protect Your Rental and Credit History

Rental/Lease agreement

Moving checklist

Utility/Cable Cable Companies

Rental payments

Fees/charges

Maintenance reimbursement

Care of the Property

Getting to know your residence

Maintenance

Tenant Renovations/Alterations

Tenant Maintenance responsibilities

Procedures for requesting maintenance

If there is an emergency

Non-emergencies

Preventative cleaning tips

Additional cleaning tips

Energy saving tips

Renters insurance

Safety tips

Vacation checklist

Holiday tips

Emergency/disasters

Drug-free housing

Frequently asked questions
When it is time to move
 Giving your notice
 Setting up your move out appointment
Preparing the property
 Cleaning
 Carpet cleaning
 Draperies/window coverings/windows
 Replacements
 Pest control
 Landscape clean up
 Trash
 Painting
 Your security deposit refund
Conclusion

Additional Tenant Forms

1. Moving checklist/utility numbers
2. Emergency/disaster checklist
3. Tenant ACH request
4. Work order request
5. Add roommate request
6. Cable/satellite/TV request
7. Request to add pet
8. Partial notice to vacate
9. Notice to vacate

Vendor Manual Outline

Vendor Welcome
Company
 Mission Statement
 General Policy
 Principals
 Personnel
Teams and/or Property Managers
 Team/Manager contact information
Communication
 Website
 Company communication
 Office information
 Address information
 Telephone
 Internet
 Office hours
 Emergency information
Vendor communication
 Email
Vendor Requirements
 Required vendor forms
 Vendor Contract
 Vendor information form

- Other vendor forms
 - Change of information form
 - Vendor work order request
 - Vendor work report
 - Vendor vacation notice
- Licenses/bonds
 - Contractor's license
 - Bonds
- Insurance
 - Workers compensation
 - General liability insurance
- Social security/tax ID
 - Social security requirements
 - Tax ID requirements
- Change of information
 - Company name
 - Address
 - Business telephone
 - Cellular telephone
 - FAX
 - Email address
 - Insurance information
 - Change of social security number to tax ID
- Workmanship
 - Competent workmanship
 - Contract labor
- Vehicles
 - Vendor supplied vehicles
 - Vehicle expense
 - Vehicle maintenance
- Vendor communication
 - Cellular telephone
 - Business telephone
 - FAX
 - Emergency contact number
- Vendor vacation
 - Vendor notification
 - Vendor notice form
- Vendor and tenant status
 - Vendors as tenants
 - Tenants as vendors
 - Immediate relative of vendors as tenants
- Keys Entry
 - Vacant properties
 - Occupied properties
- Work Order Procedures
 - Company work orders
 - Vendor Bids

Policies Regarding Vendors Working with Tenants

Appointments with tenants

- Making the tenant appointment

- The appointment

- During the appointment

Completing the appointment

- Vendor repairs communication with tenants

- Additional work requested by tenants

- Tenant behavior

- Inability to complete work

- Completion of work

Billing procedures

Payment procedures

- Vendor invoices/billings

- Disbursement of vendor payments

Year End procedures

- 1099 Miscellaneous

Conclusion

Vendor Forms

1. Vendor application
2. Vendor Contract
3. Vendor information form
4. Change of information form
5. Vendor work order/bid request
6. Vendor work report
7. Vendor vacation notice
8. Vendor checklist (for office use)
9. Request for Insurance information letter