

DFC Property Management 3 Day Training

Introduction

The DFC Property Management Training material explores the creation of districts, units, and assets; creation and tracking of tenants, certifications, logs and waiting lists; monthly and periodic billing; receiving of payments; and reporting options. The training also explores the creating of Work Orders for various types of work including Routine Maintenance, Renovations, Insurance and New Construction. This course will cover the DFC Work Order and Occupancy Modules in depth, but it will include an overview of inventory, purchase orders, job cost and payroll entry, as it relates to work orders. We will cover how to handle costs when using your own Force Account, as well as when you are dealing with contracts. We will also cover the inspection feature, as well as the program – non-program income tracking in the program.

Audience

This training material is intended for people wanting to learn the basic features and to develop a working knowledge of the typical day-to-day procedures required to effectively use DFC Property Management. The training material is targeted toward occupancy directors, occupancy specialists, accounts receivable clerks, invoicing clerks, warehouse clerks, maintenance employees, and invoicing clerks as well as Contracting Officers, Development Managers, Maintenance Managers and Workers, Inspectors, Warehouse Clerks, Occupancy Directors, Occupancy Specialists, Accounts Receivable clerks, and Invoicing clerks who need to gain foundational knowledge of the application functionality.

At Training Completion

After completing training, individuals should be able to:

- ✓ Enter information regarding applications for housing units
- ✓ Enter Tenant and Resident related information
- ✓ Create Certifications and Leases
- ✓ Create Recurring Billings
- ✓ Run Recurring Billings
- ✓ Run Tenant Statements
- ✓ Run Month-End Procedures
- ✓ Enter and Receive Security Deposit information and monies
- ✓ Enter Charges and/or Credits
- ✓ Enter Cash Receipts
- ✓ Updating unit occupancy information
- ✓ Enter and track tenant incident logs
- ✓ Handle Maintenance Work Orders
- ✓ Invoice Work Orders

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- ✓ Generate necessary reports
- ✓ Create Work Orders
- ✓ Create a Job utilizing Job Cost
- ✓ Enter a contract budget toward a job
- ✓ Add inventory items
- ✓ Create a Purchase Order for a contract and track it against a job
- ✓ Track inventory to a work order
- ✓ Track Time to a work order
- ✓ Create an Inspection
- ✓ Complete an Inspection
- ✓ Create a Work Order from an Inspection
- ✓ Run various work order and job reports
- ✓ Run reports to track contract costs against the budget
- ✓ Create an Inspection
- ✓ Complete an Inspection
- ✓ Create a Work Order from an Inspection
- ✓ Run various work order and job reports
- ✓ Run reports to track contract costs against the budget