How to Set Up a New Community

Description

Use this function to set up a new Community in the My Community tab

Step by Step

1. Navigate to the My Community tab
2. Click **New**
3. Enter a **Community ID.** This should be the name of your retirement community.
4. Copy and paste the same Community ID name into the **Name** field
5. Specify the **Parent Company**
6. Enter the Community's **Address**
7. Enter a **Phone Number** and **Fax Number**
8. In the Billing section, enter any default amounts, such as the **Default 2nd Occupant** amount
9. Enter a **Default NSF Fee**
10. Specify an **NSF Service Fee GL Account**
11. Specify a **Default AR Billing Code**
12. Specify a **Default Tax Jurisdiction**
13. Specify a **Deferred Revenue Billing Code**
14. Specify a **Default Bank Account**
15. In the Tour Defaults section, make any optional changes to the default information
16. In the Community Defaults section, specify a **Default Rent Code**
17. Specify a **Default Service Code**
18. Specify a **Default 2nd Occupant Code**
19. Verify all data and click **Save**

Information

Community ID	iaRetirement - GTA	Regional Approver	Frank Leung
Name	iaRetirement - GTA	Corporate Approver	Larry Rep
Code	306	Room Activity Summary ID	00OA0000004PCZq
Community No	2	Room Activity Summary Template	0xA0000000thsO
Parent Company	iaRetirement Communitie	Logo URL	https://c.na7.content.fo
Address	1221 Main Street	Legal Entity Name	
Address 2			
City	Toronto		
Province/State	ON		
ZIP/Postal Code	M4M 3M3		
Phone No.	(999) 155-5896		
Fax No.			
Community Location (Latitude)			
Community Location (Longitude)			

Billing

Default Respite Amount		Default AR Billing Code	Account Receivable
Default Respite Billing Code		Default Tax Jurisdiction	Ontario
Default 2nd Occupant $	675.00	Deferred Revenue Billing Code	LMR
Default Guest Rate		Default Bank Account	Bank Account GTA
Default Guest Billing Code		Default Tax Code	HST
LMR Interest Rate	3.1000	PAP Invoice Message 1	
Default NSF Fee	45.00	PAP Invoice Message 2	
NSF Service Fee GL Account	81105	Invoice Message 1	
		Invoice Message 2	
		Tax 1 Registration No.	
		Tax 2 Registration No.	

Tour Defaults

Default Tour Label	Tour	Default Revisit Label	Revisit
Default Tour Description	This is the initial visit	Default Revisit Description	This is a revisit
Default Tour Subject	Tour	Default Revisit Subject	Revisit
Default Tour Location	Community	Default Revisit Stage	Revisit
Default Tour Stage	Tour	Default Task Reminder	✔
Default Tour Duration	90	Default Reminder Time	15

Community Defaults

Anniversary Date Default Type	EOM + 1 Year	Default Rent Code	Accommodation
Anniversary Date Default	[7/7/2014]	Default Service Code	Service
		Default 2nd Occupant Code	Sharing

System Information

Owner	Liron Balboul

Save   Save & New   Cancel

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