**Training Syllabus**

**Alto Property Management and Accounts**

**(*This is a guide only to what will be covered, content may vary dependant on your needs)***

**Introduction and Home Screen**

Knowledge Centre  
PM Dashboard

**Properties**  
Add commission and charges  
Recording safety certificate and other dates  
Upload documents  
Preferred suppliers  
Creating and managing work orders  
 **Contacts**

Adding clients, applicants and third parties   
Overseas landlords’ tax  
Setting up payment methods  
  
**Offers**Making and accepting offer  
Overview of tenancy  
Creating tenancy documents

**Tenancy**

Creating AST and other documents  
Recording property visits and other dates  
Adding metre readings  
Recording deposit information  
Financial transaction history

**Letting Progression**

Progression tasks  
Update tenancy details  
Add initial invoice for rent and deposit  
Finalising tenancy

**Payments**

Paying landlord  
Paying suppliers  
Paying agency  
Bacs payments

**Accounts**

Bank reconciliation refunds  
Pay NRL tax  
Receipt tenancy monies  
Receipt reversals  
Statement reversals  
Deposit refunds  
Annual statements  
Supplier invoices

**Event Dates**

Manage safety certificates, property inspections  
Renew, periodic and vacate tenancy

**Opening Balances**

Tenancy   
Landlord  
Suppliers  
Arrears  
Deposits

**Reports**

PM financial reports  
Client bank balances  
Property management reports  
 **Tools**System administration  
Company and branch settings   
Standard paragraphs