

---

# Office Assistant System Manual



## Purpose Statement:

To improve the lives of real estate investors and residents through property management solutions.

## **Systems Manual: Office Assistant**

Reporting to Vice President of Operations

### **KRA's – Key Result Areas**

- \* Position Overview -p3
- 1. Open Office / Greet Office Visitors -p4
- 2. Receive and Distribute Mail to Office Team Members -p8
- 3. Renewal Checklist -p10
- 4. Track and Order Office Supplies -p13
- 5. Other -p14

### **Templates:**

#### **1. Office Docs**

- a. Behavioral Values
- b. Office Policy
- c. Letterhead

#### **2. Renewals**

- a. Renewal Checklist
- b. Receipt of Renewal to Tenant EM
- c. Owner Lease Renewal Notification EM
- d. Renewal Lease Fee (Residential)
- dd. Renewal Lease Fee (TCS & Clay)
- e. EM PM Notification Complete

#### **3. Other**

- a. Recurring Monthly Calendar
- b. Incident Report Form
- c. Passwords
- d. PE – Office Assistant
- e. Unlock Yorkshire Main Doors

#### **4. Social Media**

- a. Team Members
- b. GM Monthly Marketing Distribution Checklist
- c. Social Media Calendar
- d. Current Team Member Posting Checklist
- e. Current Vacant Property Posting Checklist

## **Position Overview – Office Assistant AKA OA**

The Office Assistant will report to the Vice President of Operations.

The OA will be the ‘Face of Grace Property Management’ for visitors to the office including but not limited to residents, vendors, owner clients, or anyone looking to work with GM. The OA shall conduct themselves in a friendly, helpful, and professional demeanor always. Whether dealing with residents, owners, vendors, or other Grace Property Management team members a high degree of customer service, empathy, and an overall friendly demeanor is necessary.

## **System Manual Overview:**

The system shall run the business, and the team members shall run the system. Systems are simply road maps or instructions that allow the Grace Management processes to be repeated and easily duplicated.

Property management done on a large scale is an extremely complex business with many moving parts. In order for Grace Property Management to be successful, it must be consistent.

The purpose of the system manual is to provide a consistent and specific way of doing business, and to ensure that each property, resident, owner, and as much as possible, each situation, are treated the same. Also, to define HOW Grace Property Management will do property management.

The System Manual will provide each team member with specific KRA's (Key Result Areas) for which they are responsible and a specific measure of success for each KRA, so that each team member always knows what they are doing and how to be succeeding.

Team members should always refer to their specific system manual to determine the answer to a question before bringing that question to the VP of Operations.

Any deviation outside of the system must be recognized as an exception to the system. While exceptions are necessary from time to time, each exception is by nature inefficient, and should therefore be avoided.

Each team member shall constantly work to improve the system. One purpose of the monthly Performance Evaluation meeting with the VP of Operations is to ensure that on-going system improvements are suggested, discussed and implemented.

## 1- Open Office / Greet Office Visitors

**Measure of Success: Greet each visitor immediately as they enter the office and make eye contact.**

1. The OA is the first person a visitor will see and therefore makes the first impression – which is VERY important.
2. Each morning the OA shall open the office as follows:
  - a. Open the front blinds and ensure the window is clean and the entrance is inviting.
  - b. Unlock the back-file room main office door and drawers inside as needed.
  - c. Unlock the front and back storage closets.
  - d. Turn on all office lights.
  - e. Ensure the front desk business card holders are fully stocked with cards for each team member and replenish as needed to keep it filled daily.
  - f. The thermostat should be preset. If not, adjust thermostat settings to 72 at open and change to 65 at close. Turn the Air-conditioning off at the end of the day in the summer.
  - g. Unlock the main double-door entrance to the Yorkshire building. See template 3.e.
3. At the end of each day the OA shall “close the office” repeating each of those procedures. Please note the OA does not need to lock the main Yorkshire doors at the end of the day. This is completed by the janitorial company who comes nightly.
4. As a person enters the office greet them in a friendly, professional, and respectful manner. The OA will ensure that everyone feels welcomed and appreciated.
5. If a resident is paying rent:
  - a. Confirm their payment has the property address written on it. If not, ask them the property address and write it on the memo line and accept the payment.
  - b. Do not offer a receipt but create one if they ask. To create a receipt, take a photocopy of the check, date and sign the copy and give it to the resident.
  - c. If the resident wants to know their rent balance, look it up in Rentvine (RV). Depending on the time of the month, the OA may need to look up if the Director of Accounting (DA) is currently accepting payments,

payment types accepted, confirming totals prior to accepting etc. If this is needed, RV will show an alert when viewing that Leases page. Do not just clear these alerts rather review them. Inquire with the DA if unsure on the alert.

- d. If they wish to discuss a balance due, they should speak with the DA.
  - e. No cash is to be accepted. No two-party checks are to be accepted. Acceptable payments are personal checks, money orders, cashier's checks, or paying through their tenant portal.
  - f. Once a payment has been received, IMMEDIATELY secure the payment by placing it in the Administrative Accountant's rent box or safe if the Administrative Accountant isn't in the office.
6. If a solicitor enters the office, **nically & professionally** inform them that this is a 'no soliciting building'.
  7. If a non-resident (owner or other visitor) asks to speak with a Grace Management team member, and that team member hasn't informed you they have an appointment, ask the visitor if they have an appointment. If they say no, kindly let them know that you will check to see if they are available, get their name, and call the team member to inform them they have a visitor. We strongly encourage appointments; however, we will accommodate as needed.
    - a. Offer the visitor a cup of water or coffee if they will be waiting.
    - b. When showing a visitor to a team member's office, physically walk them to the office. Never allow a visitor to walk themselves to a team member's office.
  8. If a visiting current resident wants to make a repair request:
    - a. If they are not able to make that submission for any reason, then the OA should submit the request through Rentvine on behalf of the resident.
    - b. Inform the resident that they should initiate future requests through their tenant portal or call the maintenance phone line if they do not have internet access.
  9. If a visitor enters the office and asks to fill out a rental application:
    - a. Call the Director of Leasing (DL) and confirm the property is still available.
    - b. If the DL is in the office, they will greet the individual and advise them they can apply online. If they can't do this this will give them an application to fill out.

- c. If the DL is NOT in the office, the OA should advise the visitor they can apply online or give the visitor an application and assist them in completing & answer any questions.
  - d. Once the application is complete, review the application to be sure it is filled out fully and completely.
  - e. Place the completed application and application fee in the in-box of the DL
10. If desired, lunch should be taken in coordination with a time that the RSC can provide front desk coverage.
- a. When the OA goes to lunch, plug in the front door ringer by the desk of the RSC.
  - b. If the RSC is not in the office, the front desk duties then fall to the LC or whose position is upfront.
  - c. Verbally inform the RSC that you are going to lunch, and they should now cover the front desk until you return.
  - d. When you return verbally inform the RSC that you are back and remove the door ringer from the outlet and place back in the storage closet.
11. We never want a visitor to enter the office and must wait, or 'announce' that they are in the office because we didn't realize it.
- a. Anytime the OA steps away from the front desk to a place they will not be able to see or hear if someone enters the office (even if it is just for a minute or two) inform the RSC that you are stepping away and ask them to cover the front desk for that time period.
12. Anyone that anything is received from a visitor to the office, including a letter, package, key, check, paperwork, file, etc., the OA shall record the following information from the visitor:
- a. Name of the person leaving the package
  - b. Date and time, it was left
  - c. Person's phone number
  - d. Property address pertaining to the info left
  - e. Which team member the info is for
  - f. Take the package and info to the appropriate GM team member. If they aren't there, please text them a package has arrived.

13. If a Yorkshire Plaza tenant enters the office, they should be referred to the Commercial Property Manager if the OA is unable to assist.
- a. The OA shall operate as a 'pass-through' for all commercial-related questions or inquiries. The OA will however act as a team player and help show all interested parties' properties for rent regardless of if they are residential or commercial if the appropriate team member is unavailable to assist. This can be done via the OA's computer as well as by handing them a business card.
  - b. The RSC can assist with renewal questions for TCS & Westminster storage.
  - c. If the Commercial Property Manager is unavailable and a Yorkshire Plaza tenant is locked out, review the contact info for that suite. The contact information can be found in RV. Ask the tenant for their name and for their ID. If the tenant isn't the main contact for the suite, call the main contact to inform them that a tenant is requesting to be allowed into the suite. If the contact approves, take a copy of the tenant's ID and walk them to the suite to allow them in. If unable to get in touch with the main contact inform the tenant that you must hear from them before allowing them in.
  - d. Update the key log with a note of which property it pertained to and a date with your initials.
  - e. End of the year these can be removed and shredded.

## **2- Receive and distribute mail to office team members**

**Measure of Success: Distribute mail daily within 2 hours of receipt.**

1. Receive the mail from the mail person daily and open mail immediately.
  - a. Accept mail, UPS, Fed-X, etc., for Yorkshire Plaza tenants who may not be present at the time of delivery.
  - b. If mail is received for a Yorkshire tenant, call the appropriate tenant, and inform them we are holding a package for them.
  
2. As rent checks are received by mail it is important to remove those from the mail and immediately place all payments in the rent inbox located on the desk of the Administrative Accountant.
  - a. Do not remove any payments from the envelopes, rather place the entire envelope (with the check still inside) in the rent inbox of the Administrative Accountant.
  
3. Distribute mail to each team member immediately after receipt.
  - a. Email all vendor invoices to Amy (Admin Assistant) via [Billing@RentGrace.com](mailto:Billing@RentGrace.com).
  - b. Give all resident payments to the Administrative Accountant.
  - c. Give all utility billings to the appropriate Property Manager (PM).
  - d. Give all other mail to the appropriate GM team member, as it is addressed on the envelope.
  - e. Give all vendor marketing material to the VPM.
  - f. Leave all banking and any other confidential-looking material in the sealed envelope when you give it to the VPO. These items will be in Rent Grace Property Management's name.
  - g. Leave all banking and any other confidential-looking material in the sealed envelope for Mac Real Estate. Give these to Marc.
  - h. Give all HOA and loan bills to the Accounts Payable Coordinator (AP) for them to process and pay after you have confirmed they need to be paid. Give HOA new coupon booklets, to the Administrative Accountant.
  - i. Leave all return to-sender mail in sealed envelopes and give it to the Administrative Accountant.
  - j. Give all Property Tax related documents & 1099 GM documents to Marc