ENTRATA LEARNING OBJECT TITLES & DESCRIPTIONS

This is a list of the Entrata learning objects available in the Vision Learning Object Repository (LOR).
(Updated as of 3/1/19)

Title	Description
App Store User Guide	• App Store Overview • Adding Apps in the Apps Store • App Store Billing, Payments, and Contracts • Terminating Contracts (Admin)
Applications User Guide	• Applications User Guide Overview • Generating and Managing Rent Quotes • Sending a Lead an Invitation to Apply • Starting an Application in Entrata • Changing the Primary Applicant • Adding an Applicant to an Application • Adding a Guarantor • Completing and Approving an Application • Setting up a New Application (Admin) • Setting up Screening Vendors (Admin) • Application Reports and Settings (Admin)
Bill Pay User Guide	• Paying Invoices with Bill Pay • Verifying Bill Pay Account Information (Admin)
CallAnalysis User Guide (Admin)	• CallAnalysis User Guide Overview • Managing CallAnalysis Scorecards • CallAnalysis Reports and Settings
CallTracking User Guide	• CallTracking User Guide Overview • Use CallTracking • Setting up Greetings and Vanity Numbers (Admin) • Using the IVR (Admin) • CallTracking Reports and Settings (Admin)
Catalogs & Asset Tracking User Guide	• Using the Asset List • Creating a Purchase Order from a Work Order • Receiving Purchase Order Items • Setting up Catalogs & Asset Tracking (Admin)
Corporate Leads User Guide	• Corporate Leads User Guide Overview • Adding an Application to a Business • Assigning a Unit Number to a Business's Application • Adding Occupants to a Business's Application • Corporate Leads: Filling Out the Property Application • Corporate Leads: Screening an Occupant • Corporate Leads: Generating a Lease • Corporate Leads: Moving In a Resident • Adding a Corporate Lead (Admin) • Screening a Corporate Lead (Admin) • Archiving a Business (Admin)
Craigslist Posting User Guide	• Craigslist Posting: Product Overview • Avoiding Craigslist Posting • Creating a Craigslist Ad

	• Managing Active and Archived Craigslist Ads in Entrata • Creating Ad Templates for Craigslist Posting (Admin) • Installing the Entrata Craigslist Assistant (Admin) • Craigslist Posting Reports and Settings (Admin)
Delinquency Management User Guide	• Creating a Delinquency Notice (Admin) • Setting Up Delinquency Policies (Admin) • Setting Up Small Balance Reminders • Setting Up Late Notice Settings for a Property (Admin) • Using the Delinquency Dashboard
DocManagement User Guide (Admin)	• DocManagement User Guide Overview • Managing Documents (Admin) • Using DocAccess (Admin) • DocManagement Settings (Admin)
DocStorage User Guide	• DocStorage User Guide Overview • Logging In to DocStorage • DocStorage: Managing Documents • DocStorage: Using DocAccess
Employee Portal User Guide	• Making Employee Portal Accessible (Admin) • Accessing Employee Portal • Adding Documents to Employee Portal (Admin) • Adding Custom Documents to Employee Portal (Admin)
Entrata Accounting Setup User Guide (Admin)	• Setting Up General Ledger Trees (Admin) • Setting Up Charge Codes (Admin) • Setting Up Bank Accounts AP (Admin) • Setting Up Management Fees (Admin) • Setting Up Closings (Admin) • Setting Up Accounting Budgets (Admin) • Setting Up Gross Potential Rent (Admin) • Setting Up Entrata Approvals (Admin) • Setting Up ACH Payments (Admin) • Setting Up Positive Pay SFTP Keys (Admin) • Setting Up a 1099 Transmitter (Admin)
Entrata Accounting User Guide	• Entrata Accounting User Guide Overview • Using Vendors AP • Using Purchase Orders AP • Using Invoices AP • Creating Recurring Transactions • Finalizing AP Payments • Making Payments Using AvidPay • Using Checks • Using Journal Entries AP • Reconciling Bank Accounts • Advancing a Period • Closing a Period • Rolling Back or Unlocking a Period • Using Corporate Customers • Generating Management Fees • Managing Owners AP • Using Month-End Reports for Accounting • Scheduling a Positive Pay Export • Managing Unclaimed Property • Using Inter-Company Reimbursements

	• Printing and Filing 1099 and 1096 Forms • Setting Up Positive Pay through Entrata (Admin) • Setting Up GL and AP Exports (Admin) • Creating and Scheduling GL and AP Export Batches (Admin)
Entrata Affordable HUD User Guide	• Entrata Affordable: HUD Product Overview • HUD Glossary of Terms • Checking Affordable Subsidy Eligibility • Entering HUD Certification Information • Running a Trial Certification • Processing a HUD Certification • Finalizing a HUD Certification • Correcting a Move-In Certification • Using the Affordable Waitlist • Getting to Know the Affordable Resident Profile • Using the Household Tab of the HUD Resident Profile • Performing a Recertification • Performing an Interim Recertification • Managing Ineligibility • Transferring a Resident at an Affordable Property • Managing an Affordable Repayment Agreement • Processing an Affordable Move-Out • Updating HUD Contracts and Property Information (Admin) • Updating HOME Property Information, Rent Limits, and Program Rents (Admin) • Conducting a Gross Rent Change (Admin) • Setting Up the Affordable Waitlist (Admin) • Special Claims (Admin) • HAP Requests (Admin) • TRACS Transmissions (Admin) • Entrata Affordable Reports (Admin)
Entrata Affordable Tax Credit User Guide	• Entrata Affordable: Tax Credit Product Overview • Checking Affordable Subsidy Eligibility • Entering Tax Credit Certification Information • Running a Trial Certification • Processing a Tax Credit Certification • Finalizing a Tax Credit Certification • Using the Affordable Waitlist • Getting to Know the Affordable Resident Profile • Using the Household Tab in the Tax Credit Resident Profile • Adding a New Member to a Tax Credit Household • Transferring a Resident at an Affordable Property • Performing a Recertification • Performing an Interim Recertification • Managing Ineligibility • Processing an Affordable Move-Out • Updating Tax Credit Property Information and Set-Aside (Admin) • Updating HOME Property Information, Rent Limits, and Program Rents (Admin) • Setting Up the Affordable Waitlist (Admin) • Entrata Affordable Reports (Admin)
Entrata Blog User Guide	• Entrata Blog Product Overview • Creating a Blog Post

	• Managing the Blog Approval Process • Removing a Blog Post • Using the Blog Activity Feed • Using the Entrata Blog Posting Calendar • Managing Blog Post Comments • Setting Up a Blog User (Admin)
Entrata Commercial User Guide	• Entrata Commercial Product Overview • Adding a Commercial Tenant • Getting to Know the Commercial Tenant Profile • Performing a Commercial Move-In • Performing a Commercial Move-Out • Setting Up a Commercial Property (Admin) • Setting Up Triple-Net (NNN) Expenses (Admin) • Setting Up Reimbursable Expenses (Admin) • Using the Commercial Mappings Tool (Admin)
Entrata Core Setup User Guide (Admin)	• Setting Up Rent Pricing (Admin) • Setting Up Amenities (Admin) • Setting Up Pricing Formulas (Admin) • Setting Up Floor Plans (Admin) • Setting Up a Waitlist (Admin) • Setting Up the Move-In/Move-Out Checklist (Admin) • Setting Up Late Fees (Admin) • Setting Up Resident Responsibilities (Admin) • Setting Up Specials (Admin) • Setting Up Occupant Types (Admin) • Setting Up Add-Ons (Admin) • Setting Up Deposit Interest (Admin) • Setting Up Event Results (Admin)
Entrata Core: Charges and Payments User Guide	• Adding Bulk Charges and Credits • Managing Recurring Charges on a Resident's Profile • Adding One-Time Charges or Credits • Adding a Conditional Charge or Credit to a Resident • Adding Payments for Residents • Adjusting Payments in Entrata • Voiding and Cancelling Payments • Blocking a Resident From Making Payments • Adding a Deposit • Posting a Late Fee • Adding a Collections Recovery Payment
Entrata Core: Property Management User Guide	• Entrata Core Product Overview • Setting Up a Waitlist (Admin) • Managing Leases in Entrata • Creating Lease Expiration Limits (Admin) • Completing a Move-In Checklist • Using the Move-in and Move-out Boards • Reversing a Move-in • Performing Actions for Residents • Managing Lease Utilities • Adding and Deleting Pets • Managing Midlease Modifications • Terminating a Residential Lease • Placing a Resident on Notice

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	• Moving Residents Out • Performing Financial Move-Outs • Setting Up Repayment Agreements (Admin) • Managing Repayment Agreements (Admin) • Adding a Resident • Working with Gift Incentives
Entrata Facilities User Guide	• Entrata Facilities Product Overview • Setting Up Property-Level Work Orders (Admin) • Setting Up Company-Level Work Orders (Admin) • Using Unit Type Locations (Admin) • Configuring Property-Level Work Order Settings (Admin) • Creating a Work Order • Editing Work Order Details • Managing Work Orders from the Dashboard • Setting Up the Make Ready Board (Admin) • Creating a Make Ready Request • Managing the Make Ready Board • Setting Up Resident Maintenance Surveys (Admin) • Facilities Settings and Reports (Admin)
Entrata Insights User Guide	• Entrata Insights Product Overview • Generating a Custom Report • Creating a Custom Report (Admin) • Editing a Custom Report (Admin)
Entrata Military	• Entrata Military Product Overview • Entrata Military: Filling Out Guest Cards and Applications • Entrata Military: Using the Waitlist • Completing and Approving an Application • Generating and Uploading Leases • Performing a Military Move-in • Viewing the Military Ledger on the Resident Profile • Flagging a Resident as Deployed • Performing a Military Move-Out • MAC Workflow • Entrata Military: Customizing an Application (Admin) • Entrata Military: Setting Up the Waitlist (Admin) • Setting Up Military Functionality in Units and Unit Types (Admin) • Entrata Military Reports and Settings (Admin)
Entrata PaaS Dashboard User Guide	• My Dashboard Interface Overview • Entrata Calendar • Setting Up Task Priority
Entrata PaaS New Reporting User Guide	• Getting to Know Entrata New Reporting • Using New Reporting • Converting to New Reporting (Admin) • Maintaining a Company Report Library (Admin)
Entrata PaaS Reports User Guide	• Entrata Reports Overview • Using Reports • Organizing Reports • Using the Reports Inbox • Using Reports Packets • Lead Statuses for Reporting
Entrata Pricing User Guide	• Entrata Pricing User Guide Overview • Getting to Know the Pricing Dashboard

	• Using the Pricing Dashboard • Using Pricing Dashboard Details • Managing Competitors • Setting Up Entrata Pricing (Admin) • Using the Pricing Approvals Dashboard (Admin) • Entrata Pricing Reports and Settings (Admin)
Entrata Student User Guide	• Entrata Student Product Overview • Returning Student Workflow • Setting Up Lease Terms for Student Properties (Admin) • Creating New Floor Plans and Unit Types (Admin) • Connecting Units, Unit Types, and Floor Plans (Admin) • Adding Space Options (Admin) • Pricing for Student Properties (Admin) • Managing Student Application Processes (Admin) • Surveying Roommate Interests • Bulk Unit Assignment Overview & Setup • Managing Bulk Unit Assignments and the Waitlist • Performing Move-ins and Move-outs in Bulk • Using the Move-in and Move-out Boards • Using the Bulk Roommate Shuffle • Creating a Tiered Offer Template (Admin) • Performing Student Renewals • Managing Unit Space Amenities (Admin) • Setting Up Installment Plans (Admin) • Managing Meal Plans • Countersigning Independent Leases • Student Reports and Settings
ILS Portal User Guide (Admin)	• ILS Portal Product Overview • Managing ILS Subscriptions (Admin) • Fixing Interruptive Feed Errors (Admin) • Using the ILS Data Syndication Matrix (Admin) • Using the Transmission Log (Admin) • Setting Up Lead Sources (Admin) • Setting Up Email Notifications for ILS Portal (Admin) • Denying Access to an ILS (Admin) • ILS Portal Reports and Settings (Admin)
InspectionManager User Guide	• InspectionManager Product Overview • Setting Up Inspections (Admin) • Managing Inspection Templates-Checklists (Admin) • Managing Inspections • Completing an Inspection
Job Costing User Guide	• Creating a Job in Job Costing • Using Budgets in Job Costing • Using Budget Templates in Job Costing • Using Units & Locations in Job Costing • Using Job Contracts • Managing Job Costing Financials • Managing Documents in Job Costing • Setting Up Job Costing (Admin)
Lead and Resident Documents User Guide	• Uploading a Document • Adding an eSign Document • Downloading a Document

	• Deleting a Document (Admin)
LeadManager User Guide	• LeadManager User Guide Overview • Lead Scoring Overview • Lead Source Attribution Overview • Using the Leads Tab on the Dashboard • Using the Referrers Dashboard • Using the First Month Rent Calculator • Filling Out a Guest Card in Entrata • Getting to Know the Lead Profile • Assigning a Leasing Agent to a Lead • Scheduling an Appointment with a Lead • Adding Lead Contact • Combining Leads • Reviewing Unknown Email Leads • Cancelling a Lead • Distinguishing Between Leads and Applicants (Admin) • Setting Up Referrer Types (Admin) • Setting Up Lead Sources (Admin) • Setting Up Contact Points (Admin) • LeadManager Reports and Settings (Admin)
LeaseExecution User Guide	• LeaseExecution User Guide Overview • Generating and Uploading Leases • Sending a Lease Signing Invitation • Signing and Approving a Lease • Reversing Lease Approval • Cancelling a Lease • Managing Resident Leases • Setting Up Merge Fields in Microsoft Word 2013 (Admin) • Setting Up Merge Fields in Microsoft Word 2016 (Admin) • Viewing the Global Merge Field List (Admin) • Setting Up Templates and Packets (Admin) • Uploading a PDF Template (Admin) • Customizing Merge Field Settings by Property (Admin) • LeaseExecution Reports and Settings (Admin)
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LobbyDisplay User Guide (Admin)	• LobbyDisplay Product Overview (Admin) • Creating a New LobbyDisplay (Admin) • Managing LobbyDisplay (Admin) • Setting Up LobbyDisplay Hardware (Admin) • Setting Up Chromecast (Admin) • Showcasing LobbyDisplay (Admin) • LobbyDisplay Reports and Settings (Admin)
Message Center User Guide	• Message Center User Guide Overview • Managing Message Center Lists • Creating a New Email • Creating a New Email with Classic Message Center • Sending an Email Using Uploaded Lists

	• Sending an Email from the Dashboard • Managing Scheduled, Sent, and Draft Emails • Sending Text Messages • Using Quick Responses • Managing the Email Template Library (Admin) • Setting Up Text Messaging (Admin) • Setting Up Quick Responses (Admin) • Uploading a List of Potential Leads (Admin) • Setting Up Email Headers and Footers (Admin) • Scheduling Automated Calls (Admin) • Setting Up Contact Points (Admin) • Message Center Reports and Settings (Admin)
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	• Setup – Company Permissions: Part 2 • Setup – Property Permissions: Part 1 • Setup – Property Permissions: Part 2 • Setup – Users & Groups Permissions (Admin) • Setup – Websites Permissions (Admin)
Pre-Collections Management User Guide	• Managing Pre-Collections Notices • Completing Actions from the Pre-Collections Dashboard • Setting Up Pre-Collections Management Policies (Admin)
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ProspectPortal: Basic Setup User Guide (Admin)	• ProspectPortal: Basic Setup Product Overview • Creating a New ProspectPortal Website (Admin) • Selecting a Website Design (Admin) • Using the Color Picker Tool • Adding Contact Information to Your ProspectPortal Website (Admin) • Managing the Entrata Media Library • Setting Up the ProspectPortal Website's Navigation Menu (Admin) • Setting Up an Amenities Page (Admin) • Setting Up a Blog Page (Admin) • Setting Up a Floor Plans Page (Admin) • Setting Up a Home Page (Admin) • Setting Up a Maps & Directions Page (Admin) • Setting Up a Photos & Tours Page (Admin) • Setting Up a Reviews Page (Admin) • Setting Up the ProspectPortal Website's Sidebar (Admin) • Setting Up a Property Page (Admin) • Setting Up a Custom Webpage (Admin)
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ProspectPortal: Website Features User Guide	• ProspectPortal: Website Features Product Overview • Using the ProspectPortal Website • Widget Types Overview (Admin) • Setting Up Greetings and Vanity Numbers (Admin) • Settings Up the Multi Contact Button for ProspectPortal (Admin) • Setting Up Responsive Apartment Search (Admin)

	• Setting Up the High Rise Floor Plan Viewer for ProspectPortal (Admin) • Setting Up Site Plan Tool (Admin) • Setting Up Virtual Move-In (Admin) • Creating a Website Ad (Admin) • Scheduling Ad Runs (Admin)
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ResidentPay User Guide	• ResidentPay Product Overview • Making a Payment in ResidentPortal: Resident Perspective • Making a Visa Payment: Resident Perspective • Making a MoneyGram Payment: Resident Perspective • Splitting Roommate Payments: Resident Perspective • Tracking Online Payments • Adjusting a Payment in Entrata • Blocking a Resident from Making Payments • Managing Repayment Agreements • Submitting a Merchant Change Request (Admin) • Setting Up Visa Payments (Admin) • Setting Up MoneyGram Payments (Admin) • Setting Up Certified Funds (Admin) • Setting Up Roommate Payments (Admin) • Enabling ResidentPay Account Verification (Admin) • Setting Up Charity Donations for ResidentPay (Admin) • ResidentPay Reports and Settings (Admin)
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	• Using the Community Tab in ResidentPortal: Resident Perspective • Managing the Maintenance Tab in ResidentPortal: Resident Perspective • Completing a Move-In Checklist in ResidentPortal: Resident Perspective • Requesting a Transfer in ResidentPortal: Resident Perspective • Using ResidentPortal with Amazon Alexa: Resident Perspective • Making a Payment in ResidentPortal • Selecting and Completing a Renewal Offer in ResidentPortal
ResidentUtility User Guide	• ResidentUtility Product Overview • Uploading a Missing Provider Bill • Managing the Pre-Bill • Customizing and Reviewing an Invoice Mailed to a Resident • Editing Utility Caps and Subsidies • Managing Temporary Charges • Managing Move-Outs and Vacant Cost Recovery (VCR) • ResidentUtility Reports and Settings (Admin)
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