



Revenue – Miscellaneous Billing

MB-635 HVMA Condo Lease

The document provides detailed instructions for creating a lease.

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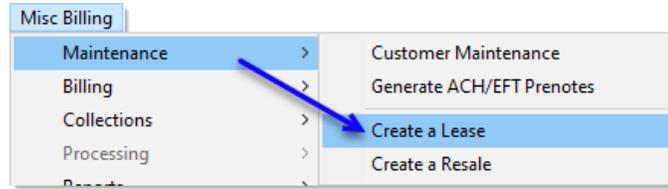
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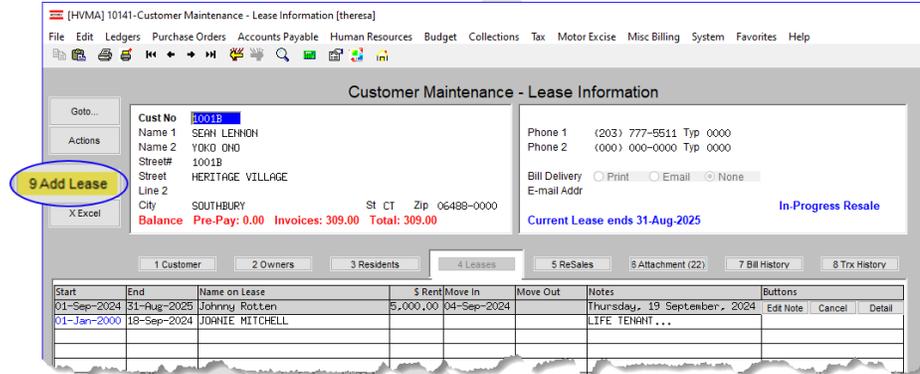
1 Create a Lease #12081

There are two ways to create a new lease.

1. Select from menu:



2. Click the [9 Add Lease] button from the Lease Tab on the customer Maintenance screen

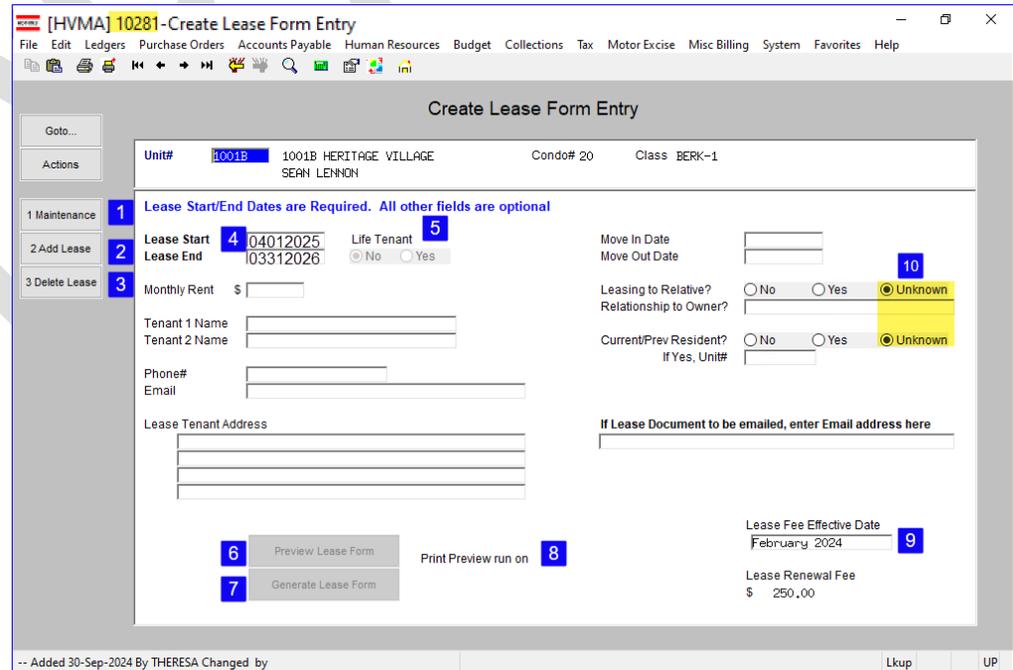


Either way will take you to the **Create Lease Form Entry** screen.

The screen is used because it requires many values and allows users to return later to complete the form before creating a lease.

Accessing this from the Menu will show a blank form.

Clicking the [9 Add Lease] button from the Lease tab of the Customer Maintenance screen will display a lease entry form for the currently selected customer.



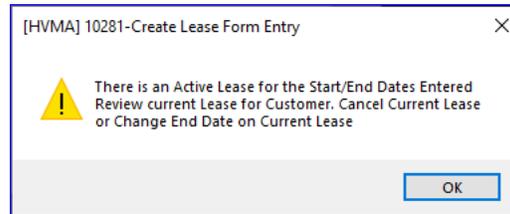


1 Maintenance

1: Takes you to the customer maintenance screen for the current customer number.

2 Add Lease

2: Adds a new lease as a work in progress (WIP). If the a current lease exists, it will notify you and will not add a new lease until the previous one is deleted or completed.



3 Delete Lease

3: Allows deleting a WIP lease before the Lease Form has been generated.

Lease Start
Lease End

4: Requires Lease Start and End Dates. Checks for overlapping dates with current leases and notifies you. Overlaps can be managed by updating dates in the Lease Tab or canceling the active lease, allowing creation of a new one.

Life Tenant
 No Yes

5: For life tenants, set this radio button to yes. This action will automatically assign the lease end date as 31-Dec-2999, signaling to the system that it is a life tenancy. Using any other date will mean the tenant is not considered a life tenant.

Preview Lease Form

6: The "Preview Lease Form" button will generate a lease form marked "DRAFT," making it unsuitable for distribution as a legal document. This button will only become active once the lease start and end dates are entered.

Generate Lease Form

7: This button will create the lease form, generate an invoice for the lease fee (if indicated), and add a record to the customer maintenance lease tab. It will only be active if the lease start and end dates are entered.

Print Preview run on 30-Sep-2024

8: Selecting preview will record the date when this action was taken.



Lease Fee Effective Date
February 2024

Lease Renewal Fee
\$ 250.00

9: The fee effective date is sourced from the Bill Form Table, but it can be updated if changes occur. This update will be reflected in the Bill Form Table for future use, eliminating the need for repeated updates.

Leasing to Relative? No Yes Unknown
Relationship to Owner? _____

Current/Prev Resident? No Yes Unknown
If Yes, Unit# _____

10: If answers to questions are unknown while creating the lease form, click the ⊙ Unknown radio button to allow the owners or tenants to answer at the time of filling out the lease form.

1.1 Preview Lease Form

This will show the completed lease form with the word “draft” prominently displayed, indicating that it is only a preview.

You can make any necessary changes until you click the generate lease form button.

HERITAGE VILLAGE MASTER ASSOCIATION, INC. (22)

Dear Non-Resident Unit Owners and Real Estate Agents,

The Heritage Village Master Association requires all leases to be kept current. To meet this requirement, we have enclosed this Lease Packet to be completed upon the beginning of a lease with new tenants.

- Please note that effective **February 2024**:
 - The cost to register a lease or change of occupancy with NEW tenants has been raised to **\$250.00**, which must be included when the fully completed lease documents are submitted to HVMA. This fee must be submitted annually, payable to HVMA.
- Seven (7) days before the lease start date, the following must be returned to the address below:
 - A copy of the executed lease agreement between the Owner and new Tenant.
 - Real Estate Agents please attach your business card to the completed lease documents if you are responsible for handling the transaction.
 - Completed HVMA forms:
 - Notice and Offer to Lease
 - Tenant's Affidavit of Occupancy
 - A clear, legible copy of each tenant's photo identification.
 - The required **\$250.00 ANNUAL processing fee is due on the anniversary of the start lease date.**

Failure to register a new tenant or comply with the lease renewal request could result in a fine imposed by the Rules Adherence Committee.

RENTAL REQUIREMENTS (per the Unit Owner Handbook and Member Condominium Bylaws)

- The rental shall be for no less than three (3) consecutive months. (Class A)
- A unit owner may not rent his unit more than once in any twelve (12) consecutive months unless previously appealed to and approved by the HVMA Executive Committee. (Class A)

If there are any questions or you need help with the completion of these forms, please contact my office by phone at (203) 264-9644 X 151, or email at trudorf@heritagevillagect.com.

Thank you in advance for your immediate attention to this matter.

Sincerely,
Tina Rudorf
Tina Rudorf
Property Records & Variances
Heritage Village Master Association, Inc.
465 Heritage Road, Suite 1
SOUTHBRURY, CT 06488

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1.2 Generate Lease Form

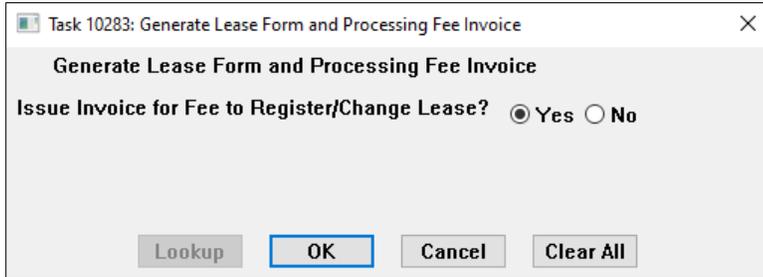
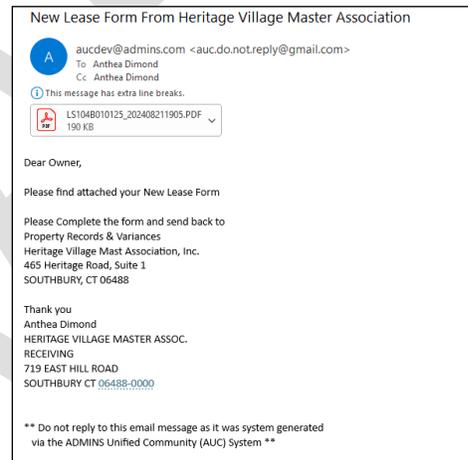


Figure 1 Prompt to issue an invoice when generating the lease form

This procedure accomplishes several tasks:

1.2.1 Creates a New "Live" Lease Form

It creates a "live" lease form, which is either shown on the screen or sent via email to the recipient, depending on whether an email address is provided. If the email address is provided, the lease form will be emailed to that address. If no email address is provided, the lease will be displayed on the screen and may be printed.



1.2.2 Attachment of the Lease on the Customer Maintenance Screen

1. Attaching the "live" lease form to the Customer allows you to view and print it anytime. It will also show in the attachment filter under lease documentation.
2. To print the original document, click **[V View]** to open it in a PDF viewer.
3. To email the document, click **[Z Email]** and enter any valid email address.



1 Customer		2 Owners		3 Residents		4 Leases		5 Sales		5 Attachment (23)		7 Bill History		8 Trx History	
Attachment Filter All Attachments															
Seq#	Description	Filename	Buttons												
20	Original JUL 2024 Monthly HOA Fees on 01	SI_2024HOAFEEES057256.PDF	V View Z Email												
21	Original AUG 2024 Monthly HOA Fees on 11	SI_2024HOAFEEES059860.PDF													
22	Original Lease Form 1023B for 01-Dec-202	LS1023B120124_202408211750.PDF	2												
23	Original Lease Processing Document on 21	SI_2024LEASE062396.PDF													

Figure 2 The Attachments screen shows the lease form; view, print, or email the form from here

1.3 Invoice for the Processing Fee

A lease renewal fee may not be needed if the property is transferred to a trust or a relative of the current or future tenant. This allows the fee to be set when the lease is created, minimizing the need for manual corrections to cancel unnecessary invoices.

If the question in [Figure 1](#) above is set to **Yes**, an invoice for the Processing Fee **will** be generated on the customer record. If it is set to **No**, an invoice for the Processing/Renewal/Change fee **will not** be created. In case it was mistakenly set to **No**, the user must create an invoice through the special invoice process for this fee.

1 Customer		2 Owners		3 Residents		4 Leases		5 Sales		5 Attachment (23)		7 Bill History		8 Trx History	
Year	Invoice#	Title	Charged	Paid	Refund	Adjust	Balance	Bill Date	Due Date	Go To					
2999	013562-00	Pre-Payments						01-Mar-2023	15-Mar-2023	V Go To Bill					
2024	059860-00	AUG 2024 Monthly	719.00	719.00				01-Aug-2024	15-Aug-2024						
2024	057256-00	JUL 2024 Monthly	719.00	719.00				01-Jul-2024	15-Jul-2024						
2024	054546-00	JUN 2024 Monthly	719.00	719.00				03-Jun-2024	17-Jun-2024						
2024	051812-00	MAY 2024 Monthly	719.00	719.00				01-May-2024	15-May-2024						
2024	049091-00	APR 2024 Monthly	719.00	719.00				02-Apr-2024	16-Apr-2024						
2024	046411-00	MAR Monthly HOA	719.00	719.00				01-Mar-2024	15-Mar-2024						
2024	043694-00	FEB Monthly HOA	719.00	719.00				01-Feb-2024	15-Feb-2024						
2024	040940-00	JAN 2024 Monthly	719.00	719.00				01-Jan-2024	15-Jan-2024						
2024	038260-00	DEC Monthly HOA	719.00	719.00				01-Dec-2023	15-Dec-2023						
2024	062396-00	Lease Processing	250.00				250.00	21-Aug-2024	04-Sep-2024						

Figure 3 An invoice is created and shown in the Bill History screen

1.3.1 Attachment of an Invoice Copy PDF

When an the Invoice is produced, a PDF copy of the Processing Fee Invoice will be created and will be available on the Attachment tab.

1 Customer		2 Owners		3 Residents		4 Leases		5 Sales		5 Attachment (23)		7 Bill History		8 Trx History	
Attachment Filter All Attachments															
Seq#	Description	Filename	Buttons												
20	Original JUL 2024 Monthly HOA Fees on 01	SI_2024HOAFEEES057256.PDF	V View Z Email												
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22	Original Lease Form 1023B for 01-Dec-202	LS1023B120124_202408211750.PDF													
23	Original Lease Processing Document on 21	SI_2024LEASE062396.PDF	4												



1.3.2 Sample of an Invoice



**HERITAGE VILLAGE
MASTERS ASSOCIATION, INC**
ASSOCIATION, INC
465 HERITAGE RD, SUITE 1
SOUTHBURY, CT 06488

Lease Processing Fee

Page 1 of 1
INVOICE #: 062415
DUE & PAYABLE: 02-Sep-2024
AMOUNT DUE: \$250.00

Description of Services Rendered	Qty	Rate	Amount Billed
For Lease starting 01-Sep-2024			\$250.00
TOTAL BILLED			\$250.00
NET DUE			\$250.00

Payment of the full amount shown must be received by 12:00 noon on the 15th to avoid late fees of \$35.00 and a finance charge of 1.5 % per month. If this matter must be referred for collection, you will be responsible for reasonable attorney's fees. Billable services include Connecticut sales tax if applicable. A \$35.00 fee will be charged for returned checks.

Invoice #: 062415
Customer #: 1028A
Customer Name: [REDACTED]
Description: Lease Processing Fee on 02-Sep-2024
Amount Due: \$250.00

For Payment Questions Contact:

DETACH AND RETURN WITH YOUR PAYMENT

1028A HERITAGE VILLAGE
SOUTHBURY, CT 06488-3533

REMIT COPY

Mail Payments & Make Payable to:
HERITAGE VILLAGE MASTER
ASSOCIATION, INC
465 HERITAGE RD, SUITE 1
SOUTHBURY, CT 06488-0000

INVOICE #: 062415
DUE & PAYABLE: 02-Sep-2024
AMOUNT DUE: \$250.00

LEASEFEE-HVMA_MBSI - 02-Sep-2024-11:02:06AM

2 FAQs

Q. How can I pause when creating a lease and then return to complete it?

A. There are two options:

1. Choose "[Create A Lease](#)" from the menu, then enter the customer number or use lookup to find it.
2. On the Customer Maintenance screen, a message will appear indicating a lease is in progress, and the **[9 Add Lease]** button will switch to **[9 Goto Lease]** and take you to the In Progress Lease.

Customer Maintenance - Lease Information

<p>Goto...</p> <p>Actions</p> <p style="background-color: yellow;">9 Goto Lease</p> <p>X Excel</p>	<p>Cust No 1028A</p> <p>Name 1 WEST, BETTE LYNN</p> <p>Name 2</p> <p>Street# 1028A</p> <p>Street HERITAGE VILLAGE</p> <p>Line 2</p> <p>City SOUTHBURY St CT Zip 06488-0000</p>	<p>Phone 1 (203) 598-9393 Typ 0000</p> <p>Phone 2 (203) 841-7720 Typ 0000</p> <p>Bill Delivery <input type="radio"/> Print <input type="radio"/> Email <input checked="" type="radio"/> None</p> <p>E-mail Addr</p>
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In-Progress Lease