What do I need to get set up on Connected Books?

1. First, Decide what time period you want to start with.

You can start with the current month in this year.

--OR--

You can back-enter information, from the beginning of the year, January 2010.

> **NOTE:** You can not decide at a later time to back-enter information from an earlier period after you have started entering information.

> **NOTE:** The only draw back is that since Connected Books works off of what's entered, you will not be able to print the current months' information until you've completed entry of all the back-dated data.

2. Here's what we'll need to set up your building on Connected Books:

> **Bank account information for the building**
> Bring with you any bank statements for the period that we're entering information for, as well as prior to that period (i.e. if you're entering January 2010, bring the bank statement for December 2009 too).

> **Apartment and Rent Roll Information**
> Bring any rent roll, meaning
> -names of homesteaders,
> -the amounts due on each apartment unit, and
> -arrears information as of the starting dates (i.e. if you're entering January 2010, bring arrears info as of December 31, 2009)
> -room count or square footage breakdown for each apartment
> -If resident is a recipient of public assistance or section 8, then we need the breakdown of the resident's AND the P.A./ Section 8 payment
> -If you want to record accurate Move-in and Move-out dates, then please have this information at the set-up appointment as well.

> **Vendor information**
> Any bills of companies you'd like to enter in the vendor section (i.e. Con Edison, etc.) In Connected Books, a vendor is anyone to whom your building writes a check.

> **Financial information**
> Have the buildings Checks, deposits slips, late charges.

How long will set up take?

Depending on the size of the building, it will take between 1 to 2 hours to set up your building. If your information is incomplete, then you can expect that it will take longer to get your building set up on Connected Books.

What can I expect from a Connected Books set-up session?

The UHAB Connected Books staff will bring the Terms of Agreement, a User Manual, and answer any questions you might have about the program. Besides getting your building set up, if time allots we'll also have a refresher training to make sure that you are comfortable using Connected Books.