



REAL ESTATE SOFTWARE

2021

Service Partner  
Certification  
Curriculum Guide





Contents

MRI Non-Product Courses 3
Database Schema 4
Financials 5
AP Application Immersion 6
AP II - Bank Reconciliation 7
AP II - Check Processing 8
AP II - Closing Procedures 9
AP II - Management Options 10
AP II - Reporting 11
AP II - Tables 12
AP II - Invoices 13
1099/CRP Training 14
Expense Control 15
GL II - Management Options 17
GL II - Reconciliation 18
GL II - Reporting 19
GL II - Tables 20
GL II - Journal Entries 21
Introduction to JobCost 22
JobCost Advanced Training 23
Commercial Management 24
CM II - Income Category Mapping 26
CM II - Lease Administration 27
CM II - Management Options 28
CM II - Rentup/Statements 29
CM II - Tables 30
CM II - Transactions/Reconciliation 31
Budget and Forecasting for CM 32
Budget and Forecasting CM Build 33
Budget and Forecasting Basics eLearning 34
Intro to Recoveries 35
Retail Recoveries 36
Residential Management 37
RM II - RM Application Immersion 38
RM II - Charge Codes and Security Codes 39
RM II - Leasing Process 40
RM II - Management Options 41
RM II - Property Setup 42
RM II - Quick Rent Roll 43
RM II - Reconciliation 44



.....

- RM II – Renewals .....45
- RM II – Rentup/Invoices .....46
- RM II – Statement of Deposit.....47
- RM II – Tables .....48
- RM II – Transactions.....49
- Screening Select.....50
- Intro to CondoPlus .....51
- Application Toolkit/Technical** .....52
- Intro to Database Design & Cabinet Maker .....53
- Report Design I .....54
- Report Design II .....55
- SSRS I.....56
- SSRS II.....57
- Web Design I.....58
- Web Design II.....59
- SaaS Login/Navigation .....60
- Security Console/Security Manager .....61
- SQL I.....62
- SQL II.....63
- Import Process.....64
- MIX API .....65
- Appendix**.....66
- Recommended Courses for Each Certification** .....67
- Pre-Requisite Exam .....67
- Financials Certification .....67
- Commercial Management Certification .....68
- Residential Management Certification .....68
- Technical Certification.....68
- Budget and Forecasting (CM) Endorsement.....69
- Budget and Forecasting (RM) Endorsement.....69
- CM Retail Endorsement .....69
- DHCR Endorsement.....69
- MRI JobCost Endorsement.....69
- Commercial Recoveries Endorsement.....70
- CondoPlus Endorsement.....70



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# MRI Non-Product Courses



## **COURSE TITLE**

Database Schema

## **COURSE OVERVIEW**

This course will introduce trainees to the table hierarchy in MRI beginning with system tables and then, reviewing each of the Alloy modules.

## **COURSE LENGTH**

2 Hours

## **CERTIFICATION CREDITS**

N/A

## **RECOMMENDED COURSE PREREQUISITES**

None

## **COURSE OUTLINE**

1. MRI System Tables
  - a. MRITABLE – List of Tables table
  - b. MRIFIELD – List of Fields table
  - c. MRIINDEX – Index table
  - d. MRIRELN – Relations table
2. General Ledger Tables
3. Accounts Payable Tables
4. Commercial Management Tables
5. Residential Management Tables



# Financials

## **COURSE TITLE**

AP Application Immersion

## **COURSE OVERVIEW**

Application Immersions are common components in all implementations and is a session often led by the consultant. This course will introduce trainees to the Accounts Payable module – covering invoice entry, check cutting, and other AP processes at a high level so trainees are equipped with the knowledge to deliver this session to clients.

## **COURSE LENGTH**

1.5 Hours

## **COURSE OUTLINE**

1. General Navigation
2. Invoice Entry
3. Cutting Checks
4. Bank Reconciliation

## COURSE TITLE

AP II – Bank Reconciliation

## COURSE OVERVIEW

This course will introduce trainees to the bank reconciliation function in the Accounts Payable module. The trainee will gain insight into the table structure, functionality, and processes of the bank reconciliation program.

## COURSE LENGTH

1.5 Hours

## CERTIFICATION CREDITS

1 Credit

## RECOMMENDED COURSE PREREQUISITES

AP Application Immersion  
AP MGMT Options  
AP Tables  
AP Invoices  
AP Reporting  
AP Check Processing  
AP Closing Procedures

## COURSE OUTLINE

1. Tables Used
  - a. SCHK – Check Summary table
  - b. DEPOSIT Tables – RM, CM, and Corporate AR
  - c. GHIS – GL Closed Period Journal Entry table
  - d. JOURNAL – GL Open Period Journal Entry table
2. Overview
  - a. Bank Reconciliation side
  - b. GL Reconciliation side
3. Processing
  - a. Withdrawals
  - b. Deposits
  - c. Bank Reconciliation Adjustments



## COURSE TITLE

AP II – Check Processing

## COURSE OVERVIEW

This course will introduce trainees to the check processing function in the Accounts Payable module. The trainee will gain insight into the check printing process and management options that affect check printing.

## COURSE LENGTH

1.5 Hours

## CERTIFICATION CREDITS

1 Credit

## RECOMMENDED COURSE PREREQUISITES

AP Application Immersion  
AP MGMT Options  
AP Tables  
AP Invoices  
AP Reporting

## COURSE OUTLINE

1. Check Batch Authorization
2. Check Printing Options on MGNT (Management Options table)
3. Check Options on BANK (Bank table)
4. Invoice Selection
5. Check Processing
  - a. System Checks
  - b. Manual Checks
  - c. Voiding Checks

## COURSE TITLE

AP II – Closing Procedures

## COURSE OVERVIEW

This course will introduce trainees to the month-end close process in the Accounts Payable module. The trainee will gain insight into the closing reports, journal entry process, and closing process for AP.

## COURSE LENGTH

1.5 Hours

## CERTIFICATION CREDITS

N/A

## RECOMMENDED COURSE PREREQUISITES

AP Application Immersion  
AP MGMT Options  
AP Tables  
AP Invoices  
AP Reporting  
AP Check Processing

## COURSE OUTLINE

1. Pre-close Reports for Reconciliation
  - a. MRI\_OPENSTAT – Open Status report
  - b. MRI\_DISTLST – Distribution List report
  - c. MRI\_CHKREG – Check Register report
2. Corrections
3. Journal Entries
4. Close Period

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## **COURSE TITLE**

AP II – Management Options

## **COURSE OVERVIEW**

This course will introduce trainees to the management options related to the Accounts Payable module and their impact on processing.

## **COURSE LENGTH**

1.5 Hours

## **CERTIFICATION CREDITS**

1 Credit

## **RECOMMENDED COURSE PREREQUISITES**

AP Application Immersion

## **COURSE OUTLINE**

1. MGNT (Management Options table) and APOPTION (AP Options table)
2. Accounts Payable Related Management Options

## COURSE TITLE

AP II – Reporting

## COURSE OVERVIEW

This course will introduce trainees to the key reports in the Accounts Payable module, discussing when to run each, and relevant run-time options.

## COURSE LENGTH

1 Hour

## CERTIFICATION CREDITS

N/A

## RECOMMENDED COURSE PREREQUISITES

AP Application Immersion  
AP MGMT Options  
AP Tables

## COURSE OUTLINE

1. MRI\_BANKREC – Bank Reconciliation report
2. MRI\_CHKREG – Check Register report
3. MRI\_DISTLST – Distribution List report
4. MRI\_OPENLST – Open Invoice List report
5. MRI\_OPENSTAT – Open Status report
6. MRI\_VENDLST – Vendor Listing report

## **COURSE TITLE**

AP II – Tables

## **COURSE OVERVIEW**

This course will introduce trainees to the key tables in the Accounts Payable module and discuss the relationship between them. The trainee will gain insight into how banks, vendors, entities, invoices, and check processing work together in AP.

## **COURSE LENGTH**

1.5 Hours

## **CERTIFICATION CREDITS**

N/A

## **RECOMMENDED COURSE PREREQUISITES**

AP Application Immersion  
AP MGMT Options

## **COURSE OUTLINE**

1. BANK - Bank table
2. VEND - Vendor table
3. ENTITY - Entity table
  - a. AP Tab within Entity Table
  - b. BMAP - Cash Map Tab within Entity Table
4. Invoice Tables
  - a. INVC – Invoice Header table
  - b. HIST – Invoice Details table
5. Check Tables
  - a. SCHK – Check Summary table
  - b. SELCHK – AP Check Selection table

## COURSE TITLE

AP II – Invoices

## COURSE OVERVIEW

This course will introduce trainees to the various types of invoices which can be entered in the Accounts Payable module. The trainee will gain insight into how different AP transactions are processed and how accounting basis affects them.

## COURSE LENGTH

1.5 Hours

## CERTIFICATION CREDITS

1 Credit

## RECOMMENDED COURSE PREREQUISITES

AP Application Immersion  
AP MGMT Options  
AP Tables

## COURSE OUTLINE

1. Accounting Basis Review
  - a. Cash Basis
  - b. Accrual Basis
2. Transactional Tables
  - a. SESS – AP Sessions table
  - b. INVC – Invoice Header table
  - c. HIST – Invoice Details table
  - d. SCHK – Check Summary table
3. Invoice Entry
  - a. One-time invoices
  - b. Recurring invoices
4. Invoice Authorization
  - a. Management Option impact on invoice authorization and deleting invoices

## COURSE TITLE

1099/CRP Training

## COURSE OVERVIEW

This course is designed to familiarize the trainee with annual 1099 and Minnesota Certificate of Rent Paid (CRP) training. By the end of this course, the trainee will be able to complete the setup and process 1099's and CRP's.

## COURSE LENGTH

1 Hour

## CERTIFICATION CREDITS

N/A

## RECOMMENDED COURSE PREREQUISITES

Intro to Accounts Payable

## COURSE OUTLINE

1. 1099 Overview
2. 1099 Setup
3. 1099 Processing
4. CRP Overview
5. CRP Setup
6. CRP Processing

## **COURSE TITLE**

Expense Control

## **COURSE OVERVIEW**

This course is designed to familiarize a trainee with an understanding of Expense Control and how to set it up. By the end of the class, the trainee should be able to understand the process flow of purchase orders/invoices through Expense Control and how to troubleshoot this piece of Accounts Payable.

## **COURSE LENGTH**

1.5 Hours

## **CERTIFICATION CREDITS**

1 Credit

## **RECOMMENDED COURSE PREREQUISITES**

Intro to Accounts Payable

## **COURSE OUTLINE**

1. Expense Control Overview
2. Expense Control Setup
3. Expense Control Process Flows
4. Expense Control Demonstration



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## **COURSE TITLE**

GL Application Immersion

## **COURSE OVERVIEW**

This course will introduce the participant to the General Ledger module – covering journal entry and other key GL processes at a high level.

## **COURSE LENGTH**

1.5 Hours

## **COURSE OUTLINE**

1. General Navigation
2. Journal Entry
3. Budget Entry

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## **COURSE TITLE**

GL II – Management Options

## **COURSE OVERVIEW**

This course will introduce trainees to the management options related to the General Ledger module and their impact on processing.

## **COURSE LENGTH**

1.5 Hours

## **CERTIFICATION CREDITS**

1 Credit

## **RECOMMENDED COURSE PREREQUISITES**

GL Application Immersion or Intro to GL

## **COURSE OUTLINE**

1. MGNT (Management Options table) and GLOPTION (General Ledger Options table)
2. General Ledger related Management Options

## **COURSE TITLE**

GL II – Reconciliation

## **COURSE OVERVIEW**

This course will introduce trainees to the reconciliation, month-end, and year-end close processes in the General Ledger module. The trainee will be able to use reports to tie out the General Ledger module with other MRI products and close a period successfully.

## **COURSE LENGTH**

1.5 Hours

## **CERTIFICATION CREDITS**

1 Credit

## **RECOMMENDED COURSE PREREQUISITES**

GL Application Immersion  
GL MGMT Options  
GL Tables  
GL Journal Entries  
GL Reporting

## **COURSE OUTLINE**

1. Pre-Close/Reconciliation Activities
  - a. Reconcile General Ledger Report with Additional Reports
  - b. Closing Other Modules
2. Month-End Close
3. Year-End Close

## **COURSE TITLE**

GL II – Reporting

## **COURSE OVERVIEW**

This course will introduce trainees to the key run-time options, reports, and financial formats in the General Ledger module. Further, we discuss why clients might use them.

## **COURSE LENGTH**

1.5 Hours

## **CERTIFICATION CREDITS**

N/A

## **RECOMMENDED COURSE PREREQUISITES**

GL Application Immersion

GL MGMT Options

GL Tables

## **COURSE OUTLINE**

1. Run-time Options
2. Standard and Comparative Income Statement Reports
3. Trial Balance Report
4. General Ledger Report
5. Balance Sheet Report
6. General Journal Entry and Current Journal Entry Reports
7. Financial Formats

## **COURSE TITLE**

GL II – Tables

## **COURSE OVERVIEW**

This course will introduce trainees to the key tables in the General Ledger module and discuss the relationship between them. The trainee will gain insight into how cash maps, entities, calendars, and journal entries work together in GL.

## **COURSE LENGTH**

1.5 Hours

## **CERTIFICATION CREDITS**

N/A

## **RECOMMENDED COURSE PREREQUISITES**

GL Application Immersion  
GL MGMT Options

## **COURSE OUTLINE**

1. PROJ - Project table
2. Entity Tables
  - a. ENTITY – Entity table
  - b. PERIOD – Calendar table
  - c. BMAP – Cash Map table
3. JOURNAL – Current Journal Entry table
4. GHIS – Closed Period Journal Entry table
5. GLSUM – General Ledger Summary table and Additional Tables

## COURSE TITLE

GL II – Journal Entries

## COURSE OVERVIEW

This course will introduce trainees to the different types of manual and system created journal entries in the General Ledger module. The trainee will be able to create varying kinds of journal entries and understand how management options impact their creation.

## COURSE LENGTH

1.5 Hours

## CERTIFICATION CREDITS

N/A

## RECOMMENDED COURSE PREREQUISITES

GL Application Immersion  
GL MGMT Options  
GL Tables

## COURSE OUTLINE

1. Open Period Journal Entries
2. Recurring Journal Entries
3. Prior Period and Prior Year Journal Entries
4. System Created Journal Entries from Other Modules
5. Management Option Impact on Journal Entries

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## COURSE TITLE

Introduction to JobCost

## COURSE OVERVIEW

This course is designed to familiarize participants with the basic features and functions of JobCost.

## COURSE LENGTH

3 Hours

## CERTIFICATION CREDITS

N/A

## COURSE OUTLINE

This class will cover the following processes:

- Setup JobCost
- Setup a JobCost project
- Work with commitments and contracts
- Work with contract draws
- Work with the General Ledger
- Run JobCost reports

---

## COURSE TITLE

JobCost Advanced Training

## COURSE OVERVIEW

This course is designed to familiarize participants with the more advanced features and functions of JobCost.

## COURSE LENGTH

3 Hours

## CERTIFICATION CREDITS

2 Credits

## RECOMMENDED COURSE PREREQUISITES

Introduction to JobCost

## COURSE OUTLINE

This class will cover the following processes:

- Work with loan draws
- Complete batch entry setup
- Work with corporate batches
- Work with Commercial Management batches





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# Commercial Management

## COURSE TITLE

CM Application Immersion

## COURSE OVERVIEW

This course will introduce the participant to the Commercial Management module – covering general navigation, leasing, monthly processing, and other CM processes at a high level.

## COURSE LENGTH

1.5 Hours

## CERTIFICATION CREDITS

N/A

## COURSE OUTLINE

1. BLDG - Building Table
2. SUIT - Suite Table
3. LEAS - Lease Table
4. CMRECC - Recurring Charges Table
5. CM Ledger Tables

## **COURSE TITLE**

CM II – Income Category Mapping

## **COURSE OVERVIEW**

This course will introduce trainees to the Income Category Mapping feature within Commercial Management setup. Upon completion of this course, the trainee will understand how to create and map income categories and security deposit income categories in CM.

## **COURSE LENGTH**

1.5 Hours

## **CERTIFICATION CREDITS**

1 Credit

## **RECOMMENDED COURSE PREREQUISITES**

CM Application Immersion or Intro to CM  
CM MGMT Options  
CM Tables

## **COURSE OUTLINE**

1. Overview
  - a. What are Income Categories
  - b. Most Commonly Used Categories
2. Source Codes
3. GL Interface Chart
4. Security Deposit Income Categories

## **COURSE TITLE**

CM II – Lease Administration

## **COURSE OVERVIEW**

This course will introduce trainees to the leasing process within Commercial Management. We discuss moving tenants in, moving tenants out, transferring suites, and adding additional space leases.

## **COURSE LENGTH**

1.5 Hours

## **CERTIFICATION CREDITS**

N/A

## **RECOMMENDED COURSE PREREQUISITES**

CM Application Immersion or Intro to CM  
CM MGMT Options  
CM Tables

## **COURSE OUTLINE**

1. Move In Tenant
2. Move Out Tenant
3. Transfer Suites
4. Review of Master Occupant ID Relationship and Adding Additional Space Leases

---

## **COURSE TITLE**

CM II – Management Options

## **COURSE OVERVIEW**

This course will introduce trainees to the management options related to the Commercial Management module and their impact on processing.

## **COURSE LENGTH**

1.5 Hours

## **CERTIFICATION CREDITS**

1 Credit

## **RECOMMENDED COURSE PREREQUISITES**

CM Application Immersion or Intro to CM

## **COURSE OUTLINE**

1. MGNT (Management Options table) and CMOPTION (CM Options table)
2. Commercial Management related Management Options

## **COURSE TITLE**

CM II – Rentup/Statements

## **COURSE OVERVIEW**

This course will introduce trainees to the Rental Update feature within Commercial Management. We discuss the impact on tables and where this process fits in with the rest of the month-end close process. We also discuss how to run and distribute monthly statements to tenants.

## **COURSE LENGTH**

1.5 Hours

## **CERTIFICATION CREDITS**

N/A

## **RECOMMENDED COURSE PREREQUISITES**

CM Application Immersion or Intro to CM  
CM MGMT Options  
CM Tables  
CM Income Category Mapping  
CM Lease Administration

## **COURSE OUTLINE**

1. Overview of Month-End Close Process
2. Review Tables Impacted by Rentup
3. Run Rentup in Edit and Update Modes and Discuss Difference
4. Print Statements for Tenants
  - a. Discuss Scheduled Event for Emailing Statements

## **COURSE TITLE**

CM II – Tables

## **COURSE OVERVIEW**

This course will introduce trainees to the core tables used within Commercial Management. We discuss the relationship between each table and provide a high level overview of fields on each table.

## **COURSE LENGTH**

1.5 Hours

## **CERTIFICATION CREDITS**

N/A

## **RECOMMENDED COURSE PREREQUISITES**

CM Application Immersion or Intro to CM  
CM MGMT Options

## **COURSE OUTLINE**

- BLDG - Building Table
- SUIT - Suite Table
- LEAS - Lease Table
- CMRECC - Recurring Charges Table
- CM Ledger Tables

## COURSE TITLE

CM II – Transactions/Reconciliation

## COURSE OVERVIEW

This course will introduce trainees to the Batch Entry and Month End Close features within Commercial Management. We discuss the different types of transactions and how to open/post batches. We also discuss the Journal Entry and Close Period functions under the Monthly Processing menu.

## COURSE LENGTH

2 Hours

## CERTIFICATION CREDITS

1 Credit

## RECOMMENDED COURSE PREREQUISITES

CM Application Immersion or Intro to CM  
CM MGMT Options  
CM Tables  
CM Income Category Mapping  
CM Lease Administration  
CM Rentup and Statements

## COURSE OUTLINE

- Discuss Opening and Posting Batches
- Types of Transactions
- Batch Entry Activity
- Discuss Journal Entry and Data Flow to General Ledger Module
- Create Journal Entries in Edit and Update Modes
- Close Period



## COURSE TITLE

Budget and Forecasting for CM

## COURSE OVERVIEW

This course is designed to provide an introductory level overview to trainees of the functions and setup of Budgeting and Forecasting (B&F). By the end of this course, the trainee will have general knowledge of the steps to setup the product, create budgets, and post budgets to the General Ledger module. Finally, the trainee will have a grasp of the CM workbook structure and how CM feeds data to B&F.

## COURSE LENGTH

2 Hours

## CERTIFICATION CREDITS

1 Credit

## COURSE OUTLINE

1. B & F Setup
  - a. Account Range Groups
  - b. Scenario Types
  - c. Workbook Definitions
  - d. Workbook Security Teams
  - e. Budget Groups
  - f. Allocations Rules
  - g. Allocation Groups
  - h. Security Console Additional Access
2. Managing Budgets
3. Creating Budgets
4. Posting the Budget to the General Ledger
5. CM Workbooks

## COURSE TITLE

Budget and Forecasting CM Build

## COURSE OVERVIEW

This course is designed to teach students how to navigate and process Commercial Management Workbooks within Budgeting and Forecasting.

## COURSE LENGTH

2 Hours

## CERTIFICATION CREDITS

1 Credit

## COURSE OUTLINE

This course will cover the following tasks within CM Workbooks:

- Suite maintenance
- Lease maintenance
- Add Prospects
- Use Speculative lease templates
- Manage Lease costs
- Calculate Management fees

Additional calculations (Recoveries, Percentage Rent, FASB, CPI) Note: The Recoveries calculations are presented only as it relates to Budgeting and Forecasting. Please see the MRI Commercial Management - Commercial or Retail Recoveries Live courses for full training on this topic.

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## COURSE TITLE

Budget and Forecasting Basics eLearning

## COURSE OVERVIEW

This self-paced eLearning course is designed to assist budget users with the most common basic tasks within MRI Budgeting and Forecasting.

## COURSE LENGTH

2 Hours

## CERTIFICATION CREDITS

1 Credit

## COURSE OUTLINE

- Upon completion of this course, you will be able to:
- Create budgets.
- Manage budgets.
- Use General Ledger workbooks.
- Run and understand the most common B&F reports.
- Post budgets to General Ledger.

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## COURSE TITLE

Intro to Recoveries

## COURSE OVERVIEW

This course is designed to familiarize participants with concepts and tasks associated with recoveries within MRI.

## COURSE LENGTH

1 Hours

## CERTIFICATION CREDITS

1 Credit

## COURSE OUTLINE

- Upon completion of this course, participants will be able to:
- Identify the what, why, and when of recoveries using common terminology
- Differentiate between the Budgeted and Actual recovery processes
- Calculate recoveries using basic math
- Set up the MRI tables used for the recoveries process
- Explain how the recoveries process works in MRI
- Run standard reports and view statements
- Troubleshoot common support issues.

## **COURSE TITLE**

Retail Recoveries

## **COURSE OVERVIEW**

This course is designed to familiarize participants with concepts and tasks associated with retail recoveries within MRI Commercial Management.

## **COURSE LENGTH**

2 Hours

## **CERTIFICATION CREDITS**

1 Credit

## **RECOMMENDED COURSE PREREQUISITES**

Intro to Recoveries

## **COURSE OUTLINE**

This class will cover the following processes:

- Prepare your system for recoveries
- Work with contributions
- Retrieving GL Data
- Calculating Recoveries
- Invoicing and Billing Recoveries
- Work with recovery formulas and custom formulas



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# Residential Management

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## COURSE TITLE

RM II – RM Application Immersion

## COURSE OVERVIEW

This course will introduce participants to the Residential Management module – covering general navigation, leasing, monthly processing, and other RM processes at a high level.

## COURSE LENGTH

2 Hours

## COURSE OUTLINE

1. Property Setup
2. Building Setup
3. Unit Type Setup
4. Unit Setup
5. Billing Options
6. Leasing Options
7. Quick Rent Roll
8. Additional RM Settings

## **COURSE TITLE**

RM II – Charge Codes and Security Codes

## **COURSE OVERVIEW**

This course will introduce trainees to charge codes and security codes within Residential Management. We discuss creating charge codes and security codes, source codes, and mapping them to the general ledger.

## **COURSE LENGTH**

1.5 Hours

## **CERTIFICATION CREDITS**

1 Credit

## **RECOMMENDED COURSE PREREQUISITES**

RM Application Immersion or Intro to RM  
RM MGMT Options  
RM Tables  
RM Property Setup  
RM Quick Rent Roll

## **COURSE OUTLINE**

1. Charge codes
2. Security codes
3. Mapping of charge codes and security codes to the GL
4. Concession code mapping
5. Non-cash credit mapping
6. Prepayment mapping



## **COURSE TITLE**

RM II – Leasing Process

## **COURSE OVERVIEW**

This course will introduce trainees to the leasing process within Residential Management. We discuss working with guest cards, phone logs, unit selection, screening applicants, scheduling move-ins, and completing move-ins.

## **COURSE LENGTH**

1.5 Hours

## **CERTIFICATION CREDITS**

N/A

## **RECOMMENDED COURSE PREREQUISITES**

RM Application Immersion or Intro to RM  
RM MGMT Options  
RM Tables  
RM Property Setup

## **COURSE OUTLINE**

1. Guest Card vs. Phone Log
2. Unit Search and Selection
3. Screening Options
2. Scheduling and Completing Move-ins on the Calendar

---

## **COURSE TITLE**

RM II – Management Options

## **COURSE OVERVIEW**

This course will introduce trainees to the management options related to the Residential Management module and their impact on processing.

## **COURSE LENGTH**

1 Hour

## **CERTIFICATION CREDITS**

1 Credit

## **RECOMMENDED COURSE PREREQUISITES**

RM Application Immersion or Intro to RM

## **COURSE OUTLINE**

1. MGNT (Management Options table) and RMOPTION (RM Options table)
2. Residential Management related Management Options

## COURSE TITLE

RM II – Property Setup

## COURSE OVERVIEW

This course will introduce trainees to property setup in Residential Management. We discuss property, building, unit type and unit level setup; default billing and leasing options; utilizing the quick rent roll; and some optional settings in the RM module.

## COURSE LENGTH

2 Hours

## CERTIFICATION CREDITS

1 Credit

## RECOMMENDED COURSE PREREQUISITES

RM Application Immersion or Intro to RM  
RM MGMT Options  
RM Tables

## COURSE OUTLINE

- Property Setup
- Building Setup
- Unit Type Setup
- Unit Setup
- Billing Options
- Leasing Options
- Quick Rent Roll
- Additional RM Settings

## COURSE TITLE

RM II – Quick Rent Roll

## COURSE OVERVIEW

This course will introduce trainees to the Quick Rent Roll within Residential Management. We discuss the process of adding residents to new properties and the tables involved in the process.

## COURSE LENGTH

1 Hour

## CERTIFICATION CREDITS

N/A

## RECOMMENDED COURSE PREREQUISITES

RM Application Immersion or Intro to RM  
RM MGMT Options  
RM Tables  
RM Property Setup

## COURSE OUTLINE

1. Quick Rent Roll process
2. Tables associated with the QRR
  - a. RMSETUP
  - b. RMSETUPDTL
  - c. RMSETUPOCCP
3. Commitment of the QRR

## COURSE TITLE

RM II – Reconciliation

## COURSE OVERVIEW

This course will introduce trainees to the month-end close and reconciliation processes within Residential Management. We discuss rentup, journal entries, closing, and reconciliation steps/reports.

## COURSE LENGTH

1.5 Hours

## CERTIFICATION CREDITS

1 Credit

## RECOMMENDED COURSE PREREQUISITES

RM Application Immersion or Intro to RM  
RM MGMT Options  
RM Tables  
RM Property Setup  
RM Leasing Process  
RM Rentup and Invoices  
RM Transactions  
RM Renewals  
RM SODA

## COURSE OUTLINE

1. Overview of Month-End Close Process
2. Rental Update
3. Journal Entries
4. Close Period
5. Reconciliation Reports/Steps
  - a. Rent Roll
  - b. Aged Delinquency
  - c. Monthly Reconciliation Report

## **COURSE TITLE**

RM II – Renewals

## **COURSE OVERVIEW**

This course will introduce trainees to the renewal feature within Residential Management. We discuss creating renewals at the property and resident level, printing renewal letters, and accepting renewals.

## **COURSE LENGTH**

1.5 Hours

## **CERTIFICATION CREDITS**

1 Credit

## **RECOMMENDED COURSE PREREQUISITES**

RM Application Immersion or Intro to RM  
RM MGMT Options  
RM Tables  
RM Property Setup  
RM Leasing Process  
RM Rentup and Invoices  
RM Transactions

## **COURSE OUTLINE**

1. Renewal Worksheet
2. Creating Individual Renewals
3. Printing Renewal Letters
4. Accepting the Offer

## COURSE TITLE

RM II – Rentup/Invoices

## COURSE OVERVIEW

This course will introduce trainees to the Rental Update feature within Residential Management. We discuss the impact on tables and where this process fits in with the rest of the month-end close process. We also discuss how to run and distribute monthly invoices to residents.

## COURSE LENGTH

1.5 Hours

## CERTIFICATION CREDITS

N/A

## RECOMMENDED COURSE PREREQUISITES

RM Application Immersion or Intro to RM  
RM MGMT Options  
RM Tables  
RM Property Setup  
RM Leasing Process

## COURSE OUTLINE

1. Overview of Month-End Close Process
2. Review Tables Impacted by Rentup
3. Run Rentup in Edit and Update Modes and Discuss Difference
4. Print Invoices for Residents

## **COURSE TITLE**

RM II – Statement of Deposit

## **COURSE OVERVIEW**

This course will introduce trainees to the statement of deposit feature within Residential Management. We discuss the resident lifecycle, Statement of Deposit Account (SODA) creation, SODA processing, SODA printing, and completing SODAs.

## **COURSE LENGTH**

1.5 Hours

## **CERTIFICATION CREDITS**

1 Credit

## **RECOMMENDED COURSE PREREQUISITES**

RM Application Immersion or Intro to RM  
RM MGMT Options  
RM Tables  
RM Property Setup  
RM Leasing Process  
RM Rentup and Invoices  
RM Transactions  
RM Renewals

## **COURSE OUTLINE**

1. SODA Creation
2. Breaking Down a SODA
  - a. Forwarding Address
  - b. Walkthroughs
  - c. Lease Violations
  - d. AR Tab
  - e. Reversing Transactions
3. Printing SODA Reports
  - a. Property Note Usage
4. Committing SODAs



## **COURSE TITLE**

RM II – Tables

## **COURSE OVERVIEW**

This course will introduce trainees to the core tables used within Residential Management. We discuss the relationship between each table and provide a high-level overview of fields on each table.

## **COURSE LENGTH**

1.5 Hours

## **CERTIFICATION CREDITS**

N/A

## **RECOMMENDED COURSE PREREQUISITES**

RM Application Immersion or Intro to RM  
RM MGMT Options

## **COURSE OUTLINE**

1. RMPROP - Property table
2. RMBLDG - Building table
3. UNIT - Unit table
4. RMLEASE - Lease table
5. RMRECC - Recurring Charges table
6. RM Ledger Tables

## **COURSE TITLE**

RM II – Transactions

## **COURSE OVERVIEW**

This course will introduce trainees to the Batch Entry feature within Residential Management. We discuss the different types of transactions and how to open/post batches.

## **COURSE LENGTH**

1.5 Hours

## **CERTIFICATION CREDITS**

N/A

## **RECOMMENDED COURSE PREREQUISITES**

RM Application Immersion or Intro to RM  
RM MGMT Options  
RM Tables  
RM Property Setup  
RM Leasing Process  
RM Rentup and Invoices

## **COURSE OUTLINE**

1. Discuss Opening and Posting Batches
2. Types of Transactions
3. Batch Entry Activity

## COURSE TITLE

Screening Select

## COURSE OVERVIEW

This course is designed to familiarize the trainee with the Screening Select interface and functionality in Residential Management. By the end of the course, the trainee will know the steps required to set up Screening Select, how to process a screening, and learn how to solve for common error messages.

## COURSE LENGTH

1 Hour

## CERTIFICATION CREDITS

1 Credit

## RECOMMENDED COURSE PREREQUISITES

Intro to Residential Management

## COURSE OUTLINE

- What is Screening Select?
- Setting up Screening Select
- Using Screening Select
- Solving for Common Screening Select Errors

## COURSE TITLE

Intro to CondoPlus

## COURSE OVERVIEW

This course will introduce trainees to the CondoPlus module.

## COURSE LENGTH

2 Hours

## CERTIFICATION CREDITS

1 Credit

## COURSE OUTLINE

This course will introduce trainees to the CondoPlus module. The trainee will learn about the condominium and co-operative industries. Further, the trainee will learn about the setup features for CondoPlus.

1. Condos versus Co-ops
2. What is CondoPlus?
3. How is CondoPlus different than RM?
4. CondoPlus setup
5. Owners and Co-Owners
6. Unit Sponsorship
7. Units and Shares
  - a. Purchases
  - b. Sales
  - c. Co-op Unit Transfers
8. Sublets
9. Allocations
10. Boardroom Management
11. Reports



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# Application Toolkit/Technical

## COURSE TITLE

Intro to Database Design & Cabinet Maker

## COURSE OVERVIEW

This course will introduce trainees to the Database Design and Cabinet Maker utilities in MRI. The first half is an overview of Database Design and how to effectively use it. The second half looks at using the Cabinet Maker tool to script out changes to the database and create custom cabinets. This course also covers some tips and tricks when code reviewing database changes.

## COURSE LENGTH

2 Hours

## CERTIFICATION CREDITS

1 Credit

## RECOMMENDED COURSE PREREQUISITES

None

## COURSE OUTLINE

1. Overview of Database Design
  - a. What is the tool and why do we have it
  - b. Overview of customization options and where the metadata is stored
  - c. What is the System Catalog used for and what are "Swap Names"
2. Basics of using Database Design
  - a. Creating tables, indexes, and foreign key relationships
  - b. Best practices and tips to get the most out of the tooling
  - c. Hands-on exercise of using the tool
3. Overview of Cabinet Maker
  - a. What are database cabinets and how are they used
  - b. Step by step guide to script out changes using cabinet maker
  - c. An overview of how the update process works
  - d. How to create custom cabinets and when they are used
  - e. Best practices when scripting out changes to the database

## COURSE TITLE

Report Design I

## COURSE OVERVIEW

This course will introduce trainees to the Report Design application. We discuss creating reports, copying reports, segment types, adding cells to segments, etc. By the end of this session, the trainee should be able to create a basic report in Report Design.

## COURSE LENGTH

3 Hour

## CERTIFICATION CREDITS

N/A

## RECOMMENDED COURSE PREREQUISITES

Database Schema

SQL I

Product knowledge is a plus

## COURSE OUTLINE

1. Toolbar
  - a. File Menu
  - b. Align to Rule
  - c. Define Icons
2. Define Segment Types
  - a. Primary Segments
  - b. Secondary Segments
  - c. Total Segments
3. Copy Reports
  - a. MRI Reports Cannot be Modified
  - b. Benefits of Copying Reports
4. Creating Reports
  - a. Selecting the Base Table
  - b. Runtime Options
  - c. Copy Report Header
  - d. Adding Segments
5. Adding Cells to Report
  - a. Labels
  - b. Calculation Fields
  - c. Drag and Drop Functionality

## COURSE TITLE

Report Design II

## COURSE OVERVIEW

This course is a continuation of Report Design I and focuses on advanced report functions and financial reports. We discuss using SQL to pull data rather than dragging and dropping from tables and additional report design functions like trim, now, getdate, etc. We also discuss web enabling reports.

## COURSE LENGTH

3 Hour

## CERTIFICATION CREDITS

1 Credit

## RECOMMENDED COURSE PREREQUISITES

Report Design I  
Database Schema  
SQL I  
SQL II is a plus for building advanced reports  
Product knowledge is a plus

## COURSE OUTLINE

1. Functions
  - a. Pulling data from tables using query
  - b. Function library in expression box
  - c. Trim
  - d. Referencing cells in other cells
  - e. Memo Cells
  - f. Skip Expressions
2. Total Segments
  - a. Subtotals
  - b. Grand Totals
3. Financial Reports
  - a. Financial Formats
  - b. Segment Types
  - c. Numpd and Selpd Functions
4. Web Enabling Reports



## COURSE TITLE

SSRS I

## COURSE OVERVIEW

This course is designed to familiarize the trainee with basic report building in SSRS. By the end of this course, the trainee will be able to create reports in Visual Studio and import them into Report Gateway.

## COURSE LENGTH

3 Hour

## CERTIFICATION CREDITS

1 Credit

## RECOMMENDED COURSE PREREQUISITES

Report Design I

Database Schema

SQL I

SQL II is a plus for building advanced reports

Product knowledge is a plus

## COURSE OUTLINE

- Create table reports
- Format reports
- Create basic and complex expressions
- Group report data
- Create matrix reports
- Sort and filter data
- Create parameter reports
- Uploading SSRS reports to MRI
- Print and export reports
- Addition of MRI security layer to SSRS reports

## COURSE TITLE

SSRS II

## COURSE OVERVIEW

This course is designed to build on the fundamentals of the first SSRS course. By the end of this course, the trainee will be able to build both financial and standard reports in Visual Studio that can have drill down functionality as well as graphing capabilities.

## COURSE LENGTH

3 Hour

## CERTIFICATION CREDITS

1 Credit

## RECOMMENDED COURSE PREREQUISITES

Report Design I  
Database Schema  
SQL I  
SQL II is a plus for building advanced reports  
SSRS I  
Product knowledge is a plus

## COURSE OUTLINE

- SSRS development environment requirements and configuration
- MRI Financial vs standard reports
- Adding hyperlinks to MRI pages or drilldown data
- Best practices for developing MRI reports
- Add images
- Add drilldown and drill through functionality
- Summarize data with charts, spark lines, data bars, and indicators

## COURSE TITLE

Web Design I

## COURSE OVERVIEW

This course will introduce trainees to the Web Design application. We discuss activity groups versus pages; the toolbar; copying and creating pages and groups; and linking custom pages.

## COURSE LENGTH

3 Hours

## CERTIFICATION CREDITS

N/A

## RECOMMENDED COURSE PREREQUISITES

Database Schema

SQL I

Product knowledge is a plus

## COURSE OUTLINE

1. Activity Groups vs. Pages
  - a. Difference between Groups and Pages
  - b. Identifying the Group and Page in MRI Web
2. Toolbar Options
  - a. File Menu
  - b. Define Icons
3. Copying Activity Groups and Pages
  - a. Cannot modify MRI standard pages
  - b. Benefits of copying pages and groups
4. Creating new Activity Groups and Pages
  - a. Selecting Base Table
  - b. Copying existing pages into new group
5. Linking Custom Pages
  - a. Customize Menus
    - i. Web Menu Security
  - b. Customize Page Links
  - c. Differences between MRI standard page and custom page

## COURSE TITLE

Web Design II

## COURSE OVERVIEW

This course is a continuation of Web Design I and focuses on advanced functions. We discuss the creation of frames and grids. We learn to pass variables from one page to another. We also discuss web enabling reports.

## COURSE LENGTH

3 Hours

## CERTIFICATION CREDITS

1 Credit

## RECOMMENDED COURSE PREREQUISITES

Web Design I

Database Schema

SQL I

SQL II is a plus for building advanced web pages

Product knowledge is a plus

## COURSE OUTLINE

1. Functions
  - a. Function library in expression box
  - b. Pulling data from tables using query
2. Frames
  - a. Creating Frames
  - b. Updating Frames
3. Grids
  - a. Drag and Drop Fields
  - b. Triple Click Feature
  - c. Command Buttons
  - d. Passing Variables

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## COURSE TITLE

SaaS Login/Navigation

## COURSE OVERVIEW

This course provides directions on how to login to the SaaS environment to access client databases and navigate appropriately.

## COURSE LENGTH

1 Hour

## CERTIFICATION CREDITS

N/A

## RECOMMENDED COURSE PREREQUISITES

None

## COURSE OUTLINE

1. Creating bookmarks for different SaaS versions
2. Navigating client environments

## COURSE TITLE

Security Console/Security Manager

## COURSE OVERVIEW

This course provides an in-depth look at the Security Console within the MRI Software application and how it controls all user activity as well as the SaaS security Manager tool and how administrators use this to add/delete users.

## COURSE LENGTH

2 Hours

## CERTIFICATION CREDITS

1 Credit

## RECOMMENDED COURSE PREREQUISITES

None

## COURSE OUTLINE

- Add/Maintain users in an MRI database
- Database security setup and maintenance
- Menu security setup and maintenance
- Table security setup and maintenance
- Report security setup and maintenance
- Entity security setup and maintenance
- What is Security Manager?
- How does a User login?
- User Management
- Adding a User
- Deleting/Restoring/Copying Users
- Setting User Security Assignments
- Creating Secondary Users

## **COURSE TITLE**

SQL I

## **COURSE OVERVIEW**

This course will introduce trainees to the basics of SQL Queries including Select, Insert, Update, and Delete statements.

## **COURSE LENGTH**

2 Hours

## **CERTIFICATION CREDITS**

N/A

## **RECOMMENDED COURSE PREREQUISITES**

None

## **COURSE OUTLINE**

1. Select Statements
  - a. Selecting "All" Records in a Table
  - b. Selecting Specific Columns
  - c. Where Clauses
  - d. Ordering By
2. Best Practices when Modifying Data
  - a. Using Select Statements First
  - b. Telling a Story with Queries
  - c. Saving Backups of Data
3. Insert Statements
4. Update Statements
5. Delete Statements

## COURSE TITLE

SQL II

## COURSE OVERVIEW

This course is the continuation of SQL I and focuses on advanced query language. We discuss primary and foreign keys, join queries, protecting data using temporary tables, and some additional functions.

## COURSE LENGTH

2 Hours

## CERTIFICATION CREDITS

1 Credit

## RECOMMENDED COURSE PREREQUISITES

SQL I

## COURSE OUTLINE

1. Primary and Foreign Keys
  - a. MRIINDEX
  - b. MRIRELN
2. Protecting Data
  - a. Temporary Tables
  - b. Update Queries
  - c. Drop Tables
3. Aliases
4. Join Queries
  - a. Inner Join
  - b. Left Join
  - c. Right Join
5. Sub Queries
6. Additional Functions
  - a. Unions
  - b. Coalesce
  - c. Substring
  - d. Concatenate
  - e. Datepart



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## COURSE TITLE

Import Process

## COURSE OVERVIEW

This interactive course provides the trainee with step-by-step processes for importing data into databases.

## COURSE LENGTH

1 Hour

## CERTIFICATION CREDITS

N/A

## RECOMMENDED COURSE PREREQUISITES

Basic MRI application knowledge

## COURSE OUTLINE

- Preparing/Reviewing data within Excel prior to importing
- Importing data from Excel into MRI

## COURSE TITLE

MIX API

## COURSE OVERVIEW

This course will introduce trainees to the MRI Information Exchange solution. The course will teach how to create a MIX API from the ground up and test APIs for viability.

## COURSE LENGTH

1 Hour

## CERTIFICATION CREDITS

1 Credit

## RECOMMENDED COURSE PREREQUISITES

None

## COURSE OUTLINE

- Standard Web Design functions when designing APIs
- Example MIX APIs and where to find them
- Testing MIX APIs
- Building APIs in MIX



# Appendix

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## Recommended Courses for Each Certification

The Pre-Requisite courses listed below can be taken in preparation for the exam. The Pre-Requisite exam is required for all individuals who are new to the certification program.

### Pre-Requisite Exam

- Database Schema
- Certification Overview
- MAX/MyMRI Portal (Documentation Only)
- MRI Basics (MELL Only)

The recommended courses listed below can be taken in preparation for each certification exam.

### Financials Certification

#### Accounts Payable Module

- AP II – AP Application Immersion
- AP II – Bank Reconciliation
- AP II – Check Processing
- AP II – Closing Procedures
- AP II – Management Options
- AP II – Reporting
- AP II – Tables
- AP II – Invoices
- 1099/CRP Training
- Expense Control

#### General Ledger Module

- GL II – GL Application Immersion
- GL II – Management Options
- GL II – Reconciliation
- GL II – Reporting

- GL II – Tables
- GL II – Journal Entries

## **Commercial Management Certification**

### Commercial Management Module

- CM II – CM Application Immersion
- CM II – Income Category Mapping
- CM II – Lease Administration
- CM II – Management Options
- CM II – Rentup/Statements
- CM II – Tables
- CM II – Transactions/Reconciliation

## **Residential Management Certification**

### Residential Management Module

- RM II – RM Application Immersion
- RM II – Charge Codes and Security Codes
- RM II – Leasing Process
- RM II – Management Options
- RM II – Property Setup
- RM II – Quick Rent Roll
- RM II – Reconciliation
- RM II – Renewals
- RM II – Rentup/Invoices
- RM II – Statement of Deposit
- RM II – Tables
- RM II – Transactions
- Screening Select

## **Technical Certification**

### Application Toolkit

- Intro to Database Design & Cabinet Maker
- Intro to MRI Web Design
- Report Design I
- Report Design II
- SSRS I

- SSRS II
- Web Design I
- Web Design II
- SaaS Login/Navigation
- Security Console/Security Manager
- SQL I
- SQL II
- Import Process
- MIX API

## **Budget and Forecasting (CM) Endorsement**

### Commercial Management Module

- Budget and Forecasting for CM
- Budget and Forecasting CM Build
- Budget and Forecasting Basics eLearning
- Budget and Forecasting Commercial Workbook eLearning

## **Budget and Forecasting (RM) Endorsement**

### Residential Management Module

- Budget and Forecasting Basics eLearning
- Budgeting and Forecasting for RM
- Budget and Forecasting Advanced eLearning

## **CM Retail Endorsement**

### Commercial Management Module

- Retail Recoveries
- Retail I
- Retail II

## **DHCR Endorsement**

### Residential Management Module

- Division of Housing and Community Renewal

## **MRI JobCost Endorsement**

### JobCost Module

- Introduction to JobCost
- JobCost Advanced Training

## **Commercial Recoveries Endorsement**

### Commercial Management Module

- Intro to Recoveries
- Retail Recoveries Training
- Recoveries I
- Recoveries II

## **CondoPlus Endorsement**

### Residential Management Module

- Intro to CondoPlus