**New Long Term Rental Property Management Account**

**Agent** Completes and uploads into The Box:

PM Management Agreement

Authorization for Direct Deposit

Onboarding Form

W9

Photos

N848 form

Letter from State Taxation Dept with the “Letter ID” if we are paying GE taxes.

Advertising form

**Executive Assistant**

Add property info into the All-Accounts Report

Create an Adv in Turbo Tenant

Create an Social Media Adv

Agent may ask to adv also in Craigslist depending on activity from TurboTenant.

Email Owner a Welcome to the Ohana letter and introduce yourself and bookkeeper

Notifies Bookkeeper of new account to add to QB

Notifies Marketing Concierge of the new listing

Set up Property into INNAGO

**Marketing Concierge** Creates and conducts the following:

Adds the listing to MRC Rental Website (WIX) Status: “AVAILABLE”

Creates the VRBO or Airbnb listing

**AFTER THE TENANT IS CHOSEN:**

**Executive Assistant**

Notify MC and bookkeeper that the property is rented.

Update Innago with Tenant info and rent info

Add tenant info into All-Accounts Report

Remove adv in Turbo Tenant &/or Craigslist

Email a Welcome to the Ohana letter to Tenant

Emails **the Renter Video to** tenant

**Marketing Concierge**

Change status in the Listing on Website to “RENTED”

Create a Social Media Adv that says “Another Property RENTED, by MRC

7.23.23

**New On-Island Contact Account**

**Agent** Completes and uploads into The Box:

OIC Management Agreement

Onboarding Form

W9

**Executive Assistant**

Emails Owner welcoming them to MRC Ohana

Create a QR Code

Notify Bookkeeper

NO need to add to our website----

**Bookeeper**

Create a file in Rentechdirect

07.24.23

**Vacation Rental Property Management Account**

**Agent** Completes and uploads into The Box:

PM Management Agreement

Authorization for Direct Deposit

Onboarding Form

W9

Photos

N848 form

Letter from State Taxation Dept with Letter ID if we are paying GE taxes.

Advertising form

QR form (if agent wants a QR code)

**Executive Assistant**

Add property info into the All-Accounts Report

Creates the VRBO or Airbnb listing (only done on Holly’s listings)

Create an Social Media Adv

Email Owner a Welcome to the Ohana letter and introduce yourself and bookkeeper

Notifies Bookkeeper of new account to add to QB

Set up Property into IGMS

Apply for GET & TAT tax number if requested & set up so its on our HI tax website

**Marketing Concierge** Creates and conducts the following:

Adds the listing to MRC Rental Website (WIX)

Create an Social Media Adv

**7.24.23**