



2019 Boston

ANNUAL CONFERENCE
& SHOWPLACE

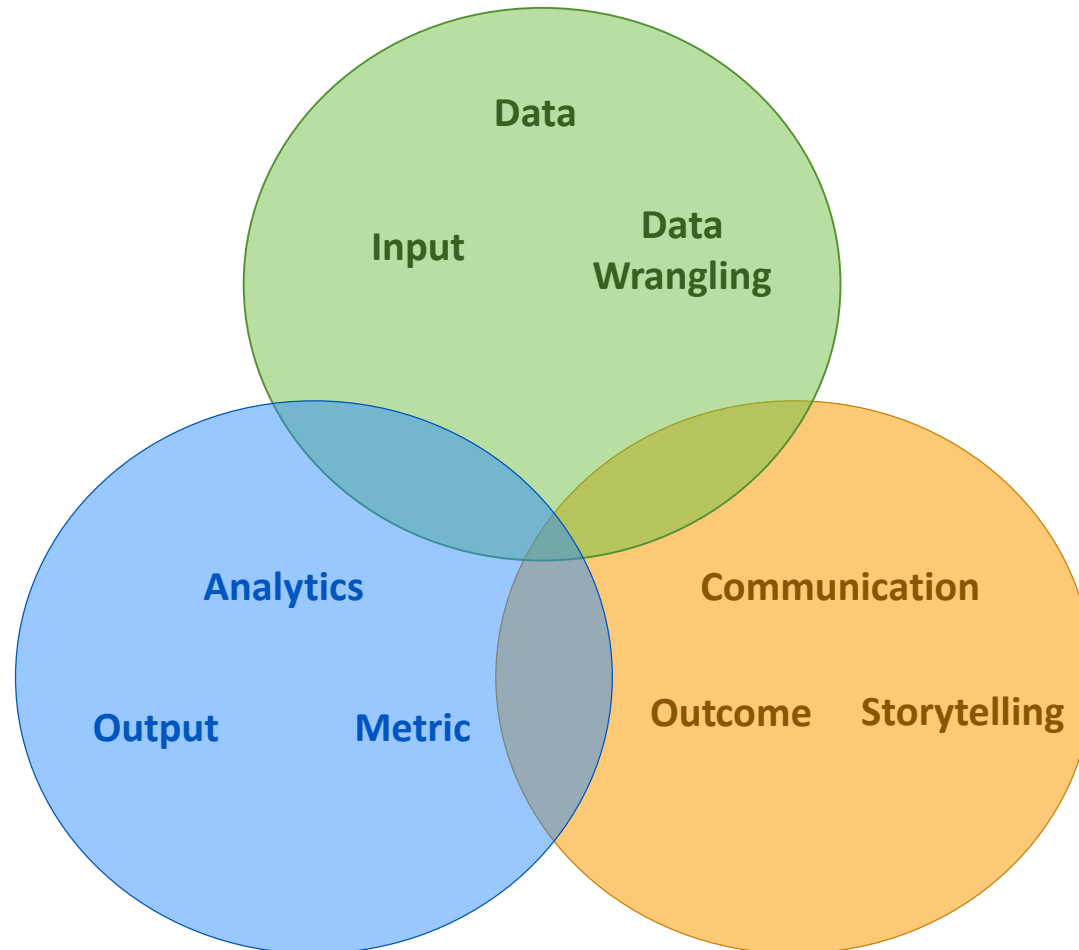
Data Visualization

Data-Based Decision-Making
and the Power of Beauty

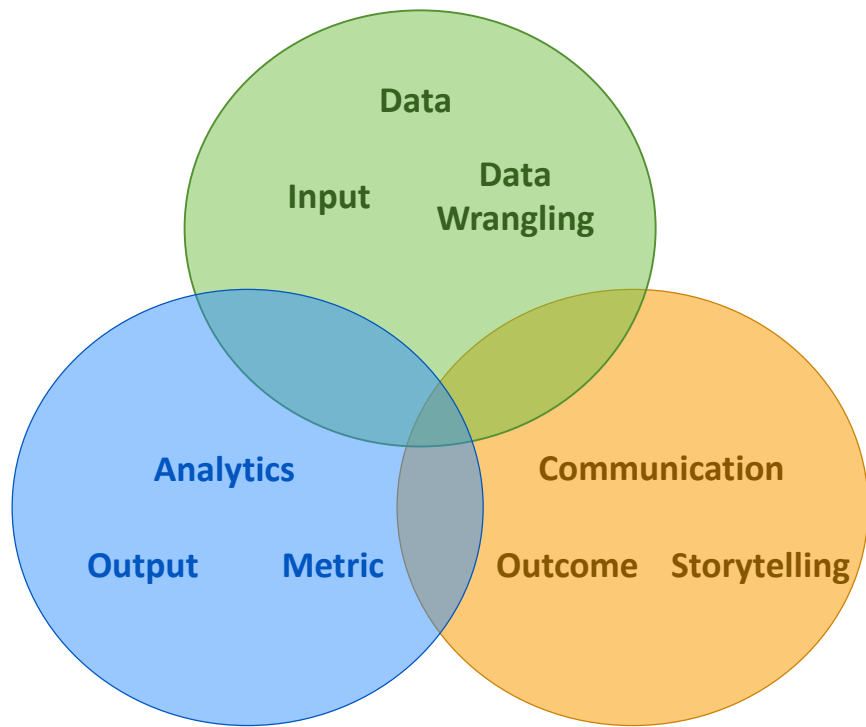
Ryan Kim | ProLink Solutions



3 Main Components of Data Initiatives

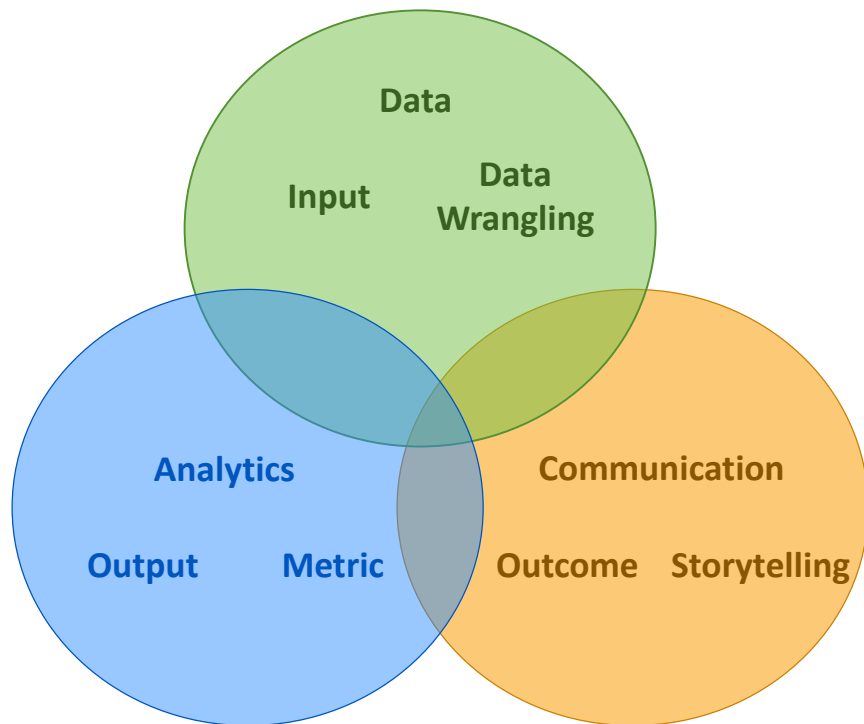


Ultimate Goals of Data Initiatives



- High Adoption
- High Impact
- Influence Decision-making

Questions to Ask Ourselves



What does your dashboard (or metrics, outputs, reports, analytics) tell your stakeholders?

Pitfalls to avoid:

- Low adoption: Dashboard is too complex (or not tailored to each audience) and it doesn't tell an effective story
- The data initiative stops at data and analysis, falling short of storytelling: This is where BI staff comes in to bridge the gap between IT and business.

ProLink Example – Industry Initiative to Standardize Property Operating Financials

Component	Problem / Opportunity	Action
Data	<ul style="list-style-type: none"> • Varying charts of accounts (financial line items) • Difficulty in financials data collection, tracking, and storage 	<ul style="list-style-type: none"> • Create a common chart of accounts. • Provide an easier data collection method. • Increase accuracy and timeliness of data.
Analytics	<ul style="list-style-type: none"> • Inconsistent property performance metrics • Lack of dashboards • Risk reviews 	<ul style="list-style-type: none"> • Create standard metrics and calculations. • Create standard reporting.
Communications	<ul style="list-style-type: none"> • Program impacts • Customer engagements 	<ul style="list-style-type: none"> • Provide a data and communication platform across the industry.

Financials Status Tracking

Server Time : 10/11/2019 02:31:06 PM (MST)

HFA # 60650 Reporting Period -
 Property Name Santa Fe Apartments Reporting Type -
 Fiscal Year End Month December Reporting Status -

Not Required
 No Due Date
 Not Received
 Past Due
 Waived
 Received
 Approved
 Rejected
 Revised

<input type="checkbox"/>	FY	Budget	January	February	March	Q1	April	May	June	Q2	July	August	Septemb	Q3	October	Novembe	Decembe	Q4	Annual	
<input type="checkbox"/>	2019	<input checked="" type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="radio"/>	+	<input type="radio"/> W	<input type="radio"/> W	<input type="radio"/> W	+	<input type="radio"/> ?	<input type="radio"/> ?	<input type="radio"/> ?	+	<input type="radio"/> ?	<input type="radio"/> ?	<input type="radio"/> ?	+	<input type="radio"/> W	
<input type="checkbox"/>	2018	<input checked="" type="radio"/>	+	+	+	+	+	+	+	+	+	+	+	+	+	+	+	+	+	<input checked="" type="radio"/>
<input type="checkbox"/>	2017	<input checked="" type="radio"/>	+	+	+	+	+	+	+	+	+	+	+	+	+	+	+	+	+	<input checked="" type="radio"/>

HFA #	60650	Reporting Period	FY2019 M3 (2019 Mar)
Property Name	Santa Fe Apartments	Reporting Type	Periodic - Monthly
Fiscal Year End Month	December	Reporting Status	Approved

Main **P&L** Balance Sheet Other

Reporting Status

Due Date	<input type="text" value="05/15/2019"/>			
Date Waived	<input type="text"/>		Waived By	<input type="text"/>
Date Received	<input type="text" value="10/07/2019"/>		Received By	<input type="text" value="Ryan Kim"/>
Date Rejected	<input type="text"/>		Rejected By	<input type="text"/>
Date Approved	<input type="text" value="10/07/2019"/>		Approved By	<input type="text" value="Ryan Kim"/>
Date Revised	<input type="text"/>		Revised By	<input type="text"/>

Resubmission Reason

HFA #	60650	Reporting Period	FY2019 M3 (2019 Mar)
Property Name	Santa Fe Apartments	Reporting Type	Periodic - Monthly
Fiscal Year End Month	December	Reporting Status	Approved

Main **P&L** Balance Sheet Other

Line Item	FY2019 M3 (2019 Mar)
▼ 5000 - Revenue	\$100,540.00
▶ 5100 - Rent Revenue	\$95,000.00
▶ 5200 - Vacancy	(\$3,000.00)
▶ 5300 - Eldery Service Revenue	\$5,000.00
▶ 5400 - Financial Revenue	\$2,000.00
▶ 5900 - Other Revenue	\$1,540.00
▼ 6000 - Expense	\$103,725.00
▶ 6200 - Administrative Expense	\$14,185.00
▼ 6400 - Utility Expense	\$7,400.00
▶ 6420 - Fuel	\$0.00
▼ 6450 - Utility	\$7,400.00
6450.11 - Electricity	\$2,800.00
6450.21 - Gas	\$1,400.00
6450.32 - Water	\$2,700.00
6450.33 - Sewer	\$500.00
▶ 6500 - Operating and Maintenance Expense	\$24,850.00

Edit Financial

Server Time : 10/11/2019 02:59:25 PM (MST)

HFA #	60650	Reporting Period	FY2019 M3 (2019 Mar)
Property Name	Santa Fe Apartments	Reporting Type	Periodic - Monthly
Fiscal Year End Month	December	Reporting Status	Approved

Main **P&L** Balance Sheet Other

Line Item	FY2019 M3 (2019 Mar)
▶ 5000 - Revenue	\$100,540.00
▼ 6000 - Expense	\$103,725.00
▶ 6200 - Administrative Expense	\$14,185.00
▼ 6400 - Utility Expense	\$7,400.00
▶ 6420 - Fuel	\$0.00
▶ 6450 - Utility	\$7,400.00
▶ 6500 - Operating and Maintenance Expense	\$24,850.00
▶ 6600 - Depreciation and Amortization Expense	\$26,700.00
▶ 6700 - Tax and Insurance Expense	\$7,890.00
▶ 6800 - Financial Expense	\$17,700.00
▶ 6900 - Eldery Service Expense	\$4,000.00
▶ 7100 - Corporate Partnership Expense	\$1,000.00

[Analyze Performance](#)

[Find Funding](#)

[Monitor Construction](#)

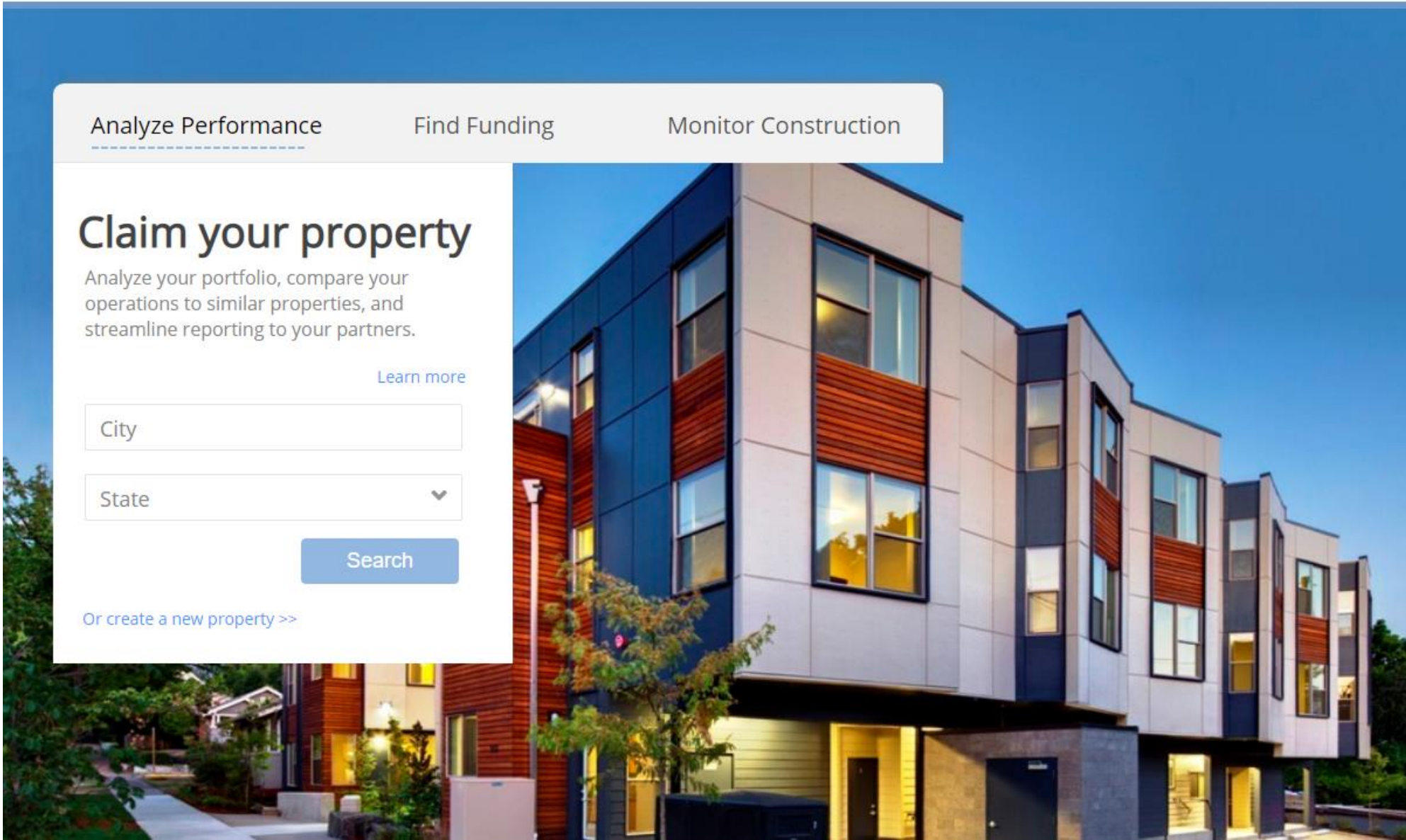
Claim your property

Analyze your portfolio, compare your operations to similar properties, and streamline reporting to your partners.

[Learn more](#)

Search

[Or create a new property >>](#)



Analyze Performance

Find Funding

Monitor Construction

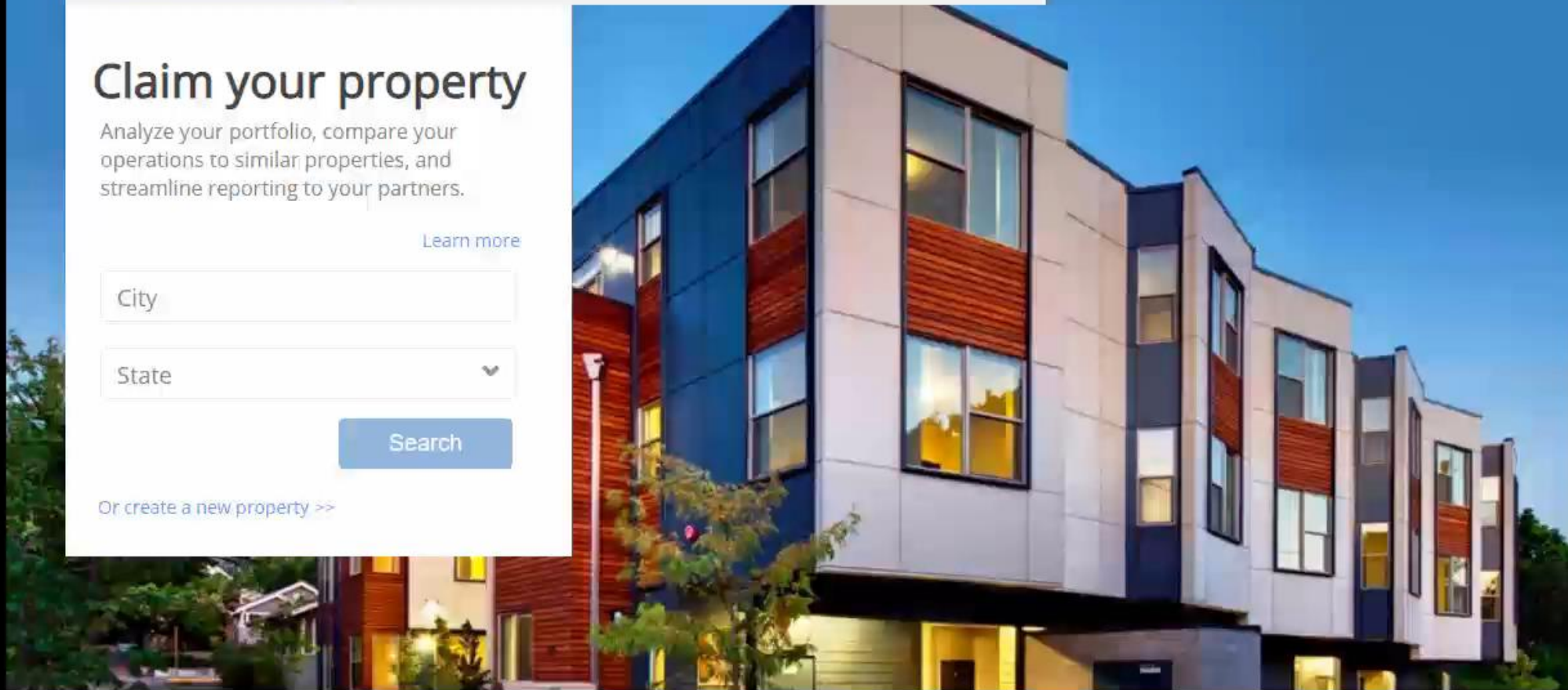
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Back to Home

Home / Multifamily Development Group / Garden Court Apartments / Data Exchange

MULTIFAMILY DEVELOPMENT GROUP

Garden Court Apartments

72 Colfax Drive
Englewood, CO 80112

- Overview
- Participant Organizations
- Data Exchange
- Financial Performance
- Resident Outcome Analysis
- Files
- Posts
- Tasks
- Calendar
- Activity
- Collaborators
- WorkCenter Settings
- Linked WorkCenters

Financials Resident Outcomes Tenant Income Certification

Upload your trial balance

Procorem can accept CSV or XLS files from most of the major property management software systems. Simply export your trial balance and upload the file here.

Upload

[Learn more about supported trial balance exports >>](#)

Allow financial sharing

By sharing financial data on this property with the platform you get access to similar comparables. Shared financial data is anonymized and aggregated so you never have to worry. You can choose the level of financials sharing for each property.

Financial Sharing ON

[Learn more about sharing >>](#)

My Financials

- Annual budget to be uploaded 60 days before the beginning of the next fiscal year
- Trial balance to be uploaded monthly by the 15th of the next month
- Annual audit trial balance to be uploaded 30 days after the end of the fiscal year

from



Professional Property Managers, LLC

Not Required Waived No Due Date Received Not Received Approved Past Due Revised

FY	Budget	Jan	Feb	Mar	Q1	Apr	May	Jun	Q2	Jul	Aug	Sep	Q3	Oct	Nov	Dec	Q4	Annual
2019	✓	⚠	⚠	⚠	+	✓	✓	✓	+	?	⌚	⌚	+	⌚	⌚	⌚	+	⌚
2018	✓	✓	✓	✓	+	✓	✓	✓	+	✓	✓	✓	+	✓	✓	✓	+	⚠

★ Favorite this WorkCenter

