



Kanso Native Housing Summit

Getting the most from your Kanso Site

Highlighting the features tools in Kanso that you may not be fully utilizing

July 31st, 2024, at 9:00 am

Training Room





Our Team



James Gutierrez

Senior Account Manager & former IHA ED

Worked directly in affordable housing for 20 years



Andrew Selberg

Account Executive and former Client Success team member

Will help you get the most out of your site.



Zach Lenart

Account Executive and former Client Success team member.

Very knowledgeable on the ins and outs of Kanso Software

Getting the most from Kanso

Work more Efficiently

Document your Work

Report with Clarity

Serve your Community Better

Site Set Up & the GL Export

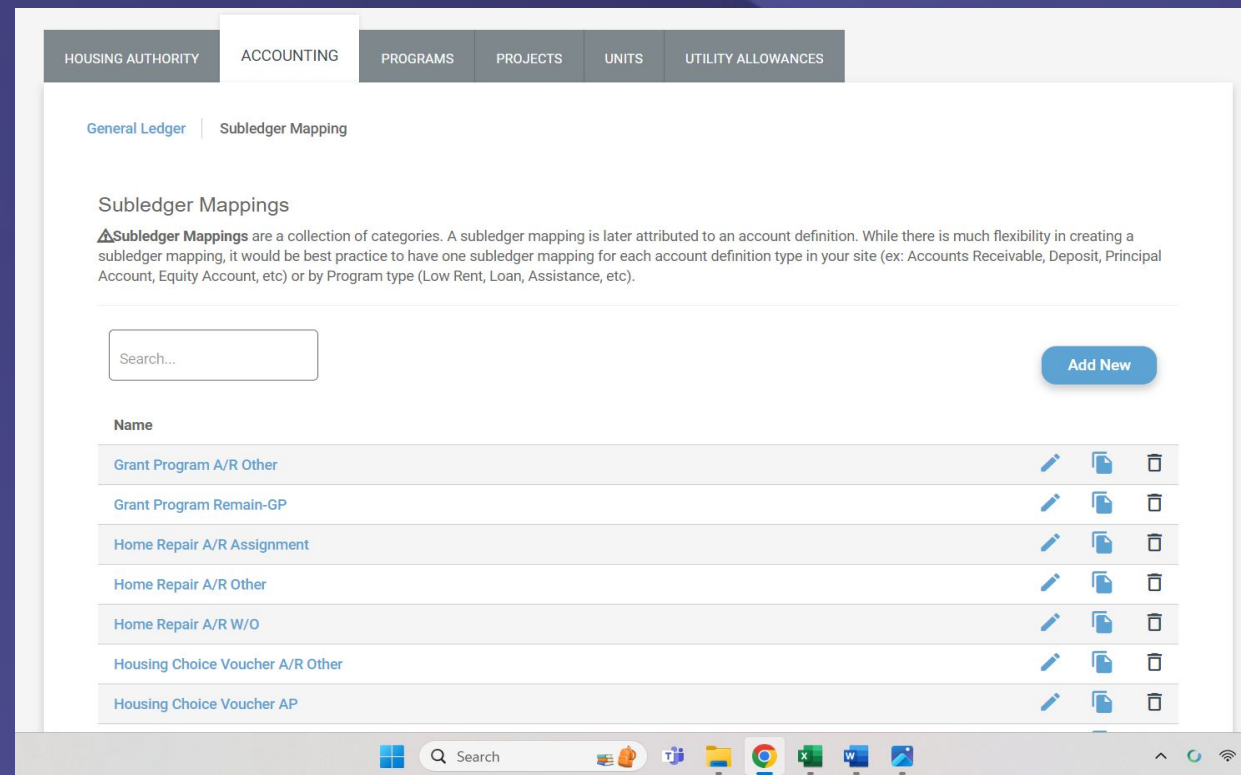
Custom Action Documents and Email

Inventory

Custom Attributes

Browser Tools

Kanso Feature: Configurable Site Set Up



Kanso is highly configurable to meet your accounting process and reporting requirements.

Ensure that areas of your Kanso Site is set up properly to ensure that financial information flows up correctly to the General Ledger Export.

- Tenant Accounts and Sub-Ledger Accounts
- Accounting Payment Locations
- Maintenance Funding Sources & Departments

Kanso Feature: General Ledger Integration

Kanso is a sub-ledger that should be informing your General Ledger software (like Sage) monthly.

Without the Export Tool, this is a manual process that takes time and potentially introduces error to the accounting processes and reporting.

Once the Kanso subledgers are correctly mapped to your General Ledger Chart of Accounts, this becomes a automated process.

Month End Accounting

Review, reconcile, and close accounting periods for export to the general ledger.

1. Lock the accounting period to prevent other users from making changes during the review process.
2. Reconcile the locked period to ensure that all transactions and balances are accurate.
3. Close the accounting period by selecting "finalize" to prevent any future changes, and export this activity to the general ledger.

Select Year: 2024

Month	Status	Closed/Locked By	Date/Time		
July 2024	Open	-	-	👍	👎
June 2024	Locked	jamesg@hdsllabs.com	July 2, 2024, 12:12 PM	👍	👎
May 2024	Locked	jamesg@hdsllabs.com	June 26, 2024, 8:14 AM	👍	👎
April 2024	Locked	jamesg@hdsllabs.com	May 7, 2024, 11:54 AM	👍	👎
March 2024	Locked	jamesg@hdsllabs.com	April 22, 2024, 11:57 AM	👍	👎
February 2024	Locked	jamesg@hdsllabs.com	March 28, 2024, 12:13 PM	👍	👎
January 2024	Locked	jamesg@hdsllabs.com	February 21, 2024, 3:46 PM	👍	👎

Kanso Feature: Custom Action Documents

Jerry Seinfeld Household
Unit: Moved In to 1225 West Ave, 2 | New York, New York 65695
Program: Low Rent | Project: Tooneville

OVERVIEW TENANT LEDGER TRACKING NOTES WAIT LISTS DOCUMENTS HOUSEHOLD HISTORY INCOME, ASSETS, EXPENSES

Action History

Effective Date	Action	Unit	Monthly Transaction
Sep 1, 2024	Interim Recertification	1225 West Ave, 2, New York, New York 65695	\$270.00
Feb 1, 2024	Interim Recertification	1225 West Ave, 2, New York, New York 65695	\$240.00

UNDO RECERT

Created By: jamesg@hdslabs.com Documents
Effective Date: Sep 1, 2024 Rent Change-07-09-2024.pdf
Description: Income Increase TTP Worksheet-07-09-2024.pdf
Date Entered: Jul 9, 2024

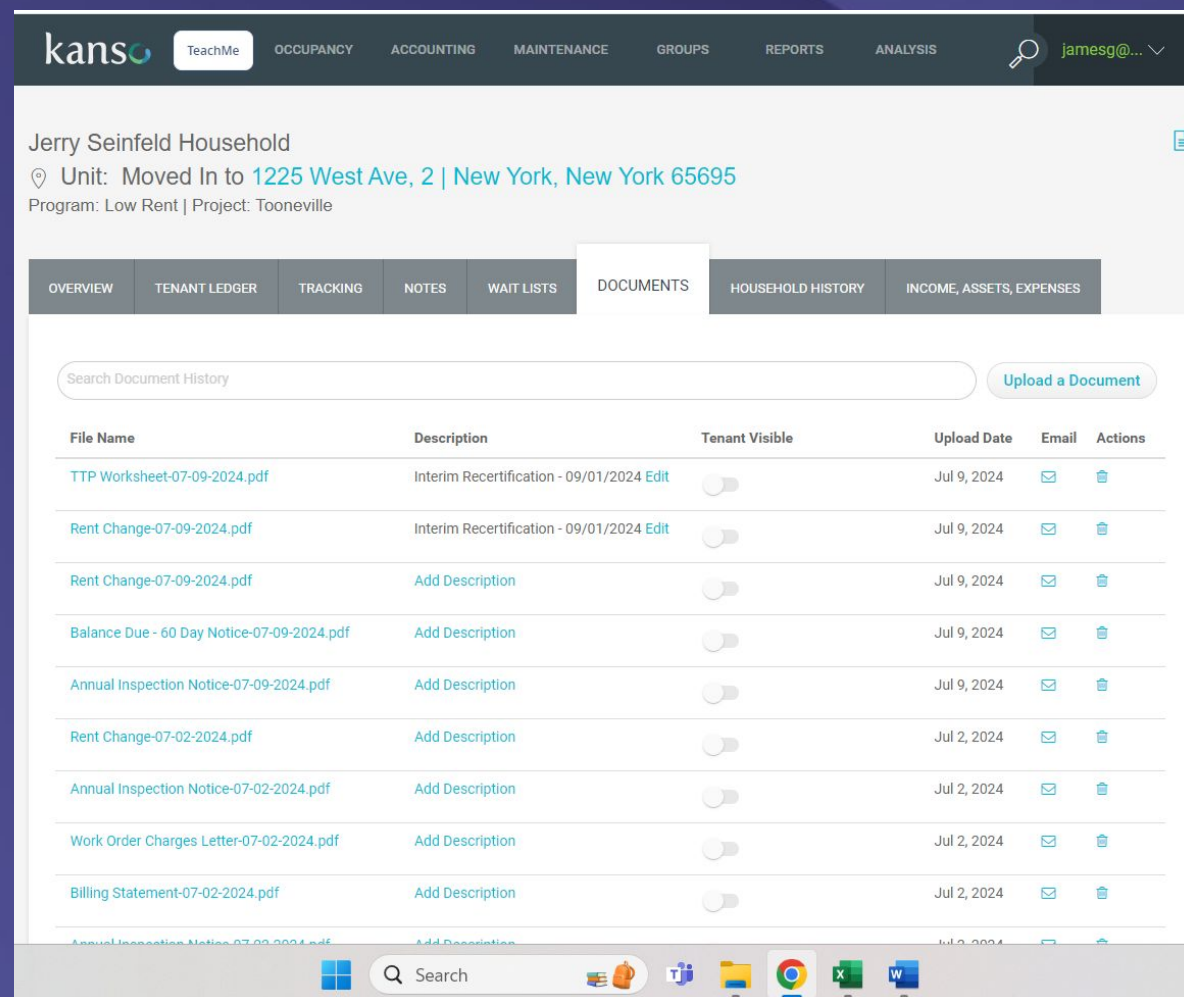
Created By: jamesg@hdslabs.com Documents
Effective Date: Feb 1, 2024 HUD-9886 IHA-03-20-2024.pdf
Description: Reduction in income HH members moved out TTP Worksheet-01-25-2024.pdf
Date Entered: Jan 25, 2024 Rent Change-01-25-2024.pdf
Household Information-01-25-2024.pdf

Kanso can create much of your tenant correspondence by setting up Custom Action Documents.

Documents can automatically generate based on a specific household action.

Kanso can also generate letters for Work Orders that have tenant charges.

Kanso Feature: Email Capabilities

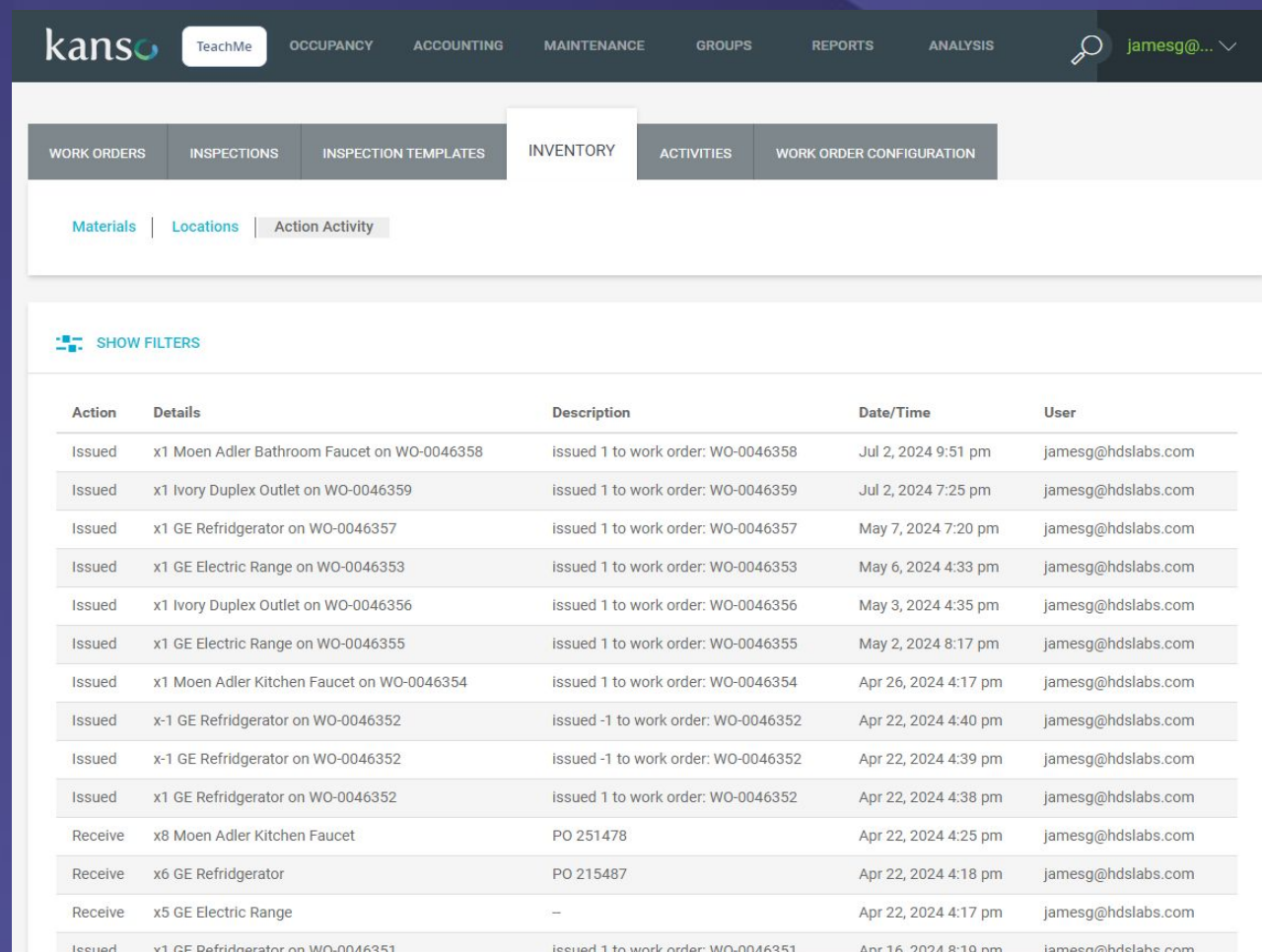


Once you have created documents, statements or receipts in Kanso, use the Email feature to send your documents directly to your tenants.

These features saves your team time and costs:

- No printing documents
- No postage costs
- No paper document/file management
- Tenants receive correspondence instantly
- All correspondence is electronically stored
- Unlimited storage space in Kanso
- Kanso meets all HUD document retention requirements

Kanso Feature: Inventory



The screenshot displays the 'Inventory' section of the Kanso software. The interface includes a navigation bar with 'kanso' logo and 'TeachMe' button, and a menu with 'OCCUPANCY', 'ACCOUNTING', 'MAINTENANCE', 'GROUPS', 'REPORTS', and 'ANALYSIS'. Below the navigation, there are tabs for 'WORK ORDERS', 'INSPECTIONS', 'INSPECTION TEMPLATES', 'INVENTORY', 'ACTIVITIES', and 'WORK ORDER CONFIGURATION'. The 'INVENTORY' tab is active, showing sub-tabs for 'Materials', 'Locations', and 'Action Activity'. A 'SHOW FILTERS' button is visible. The main content is a table with the following columns: Action, Details, Description, Date/Time, and User.

Action	Details	Description	Date/Time	User
Issued	x1 Moen Adler Bathroom Faucet on WO-0046358	issued 1 to work order: WO-0046358	Jul 2, 2024 9:51 pm	jamesg@hdslabs.com
Issued	x1 Ivory Duplex Outlet on WO-0046359	issued 1 to work order: WO-0046359	Jul 2, 2024 7:25 pm	jamesg@hdslabs.com
Issued	x1 GE Refridgerator on WO-0046357	issued 1 to work order: WO-0046357	May 7, 2024 7:20 pm	jamesg@hdslabs.com
Issued	x1 GE Electric Range on WO-0046353	issued 1 to work order: WO-0046353	May 6, 2024 4:33 pm	jamesg@hdslabs.com
Issued	x1 Ivory Duplex Outlet on WO-0046356	issued 1 to work order: WO-0046356	May 3, 2024 4:35 pm	jamesg@hdslabs.com
Issued	x1 GE Electric Range on WO-0046355	issued 1 to work order: WO-0046355	May 2, 2024 8:17 pm	jamesg@hdslabs.com
Issued	x1 Moen Adler Kitchen Faucet on WO-0046354	issued 1 to work order: WO-0046354	Apr 26, 2024 4:17 pm	jamesg@hdslabs.com
Issued	x-1 GE Refridgerator on WO-0046352	issued -1 to work order: WO-0046352	Apr 22, 2024 4:40 pm	jamesg@hdslabs.com
Issued	x-1 GE Refridgerator on WO-0046352	issued -1 to work order: WO-0046352	Apr 22, 2024 4:39 pm	jamesg@hdslabs.com
Issued	x1 GE Refridgerator on WO-0046352	issued 1 to work order: WO-0046352	Apr 22, 2024 4:38 pm	jamesg@hdslabs.com
Receive	x8 Moen Adler Kitchen Faucet	PO 251478	Apr 22, 2024 4:25 pm	jamesg@hdslabs.com
Receive	x6 GE Refridgerator	PO 215487	Apr 22, 2024 4:18 pm	jamesg@hdslabs.com
Receive	x5 GE Electric Range	--	Apr 22, 2024 4:17 pm	jamesg@hdslabs.com
Issued	x1 GE Refridgerator on WO-0046351	issued 1 to work order: WO-0046351	Apr 16, 2024 8:19 pm	jamesg@hdslabs.com

The Inventory feature is an underutilized tool that creates efficiencies for your Maintenance, Accounting and Tenant Services teams.

- Track maintenance materials and costs via Work Orders in Kanso
- Your Maintenance team will not be reliant on Accounting for material cost information.
- Track materials and supplies from the PO to Locations and unit.
- Know the value of materials and supplies.
- Saves extra trips to the hardware store - folks constantly running errands becomes a PITA and time and efficiency loss.

Kanso Feature: Custom Attributes

Entity Name	Name	Type	Enabled
Member	POA	Toggle	<input checked="" type="checkbox"/>
Unit	Radon Detector	Toggle	<input checked="" type="checkbox"/>
Household	Period of Affordability - 5 Years	Date	<input checked="" type="checkbox"/>
Unit	Radon Detector Test	Date	<input checked="" type="checkbox"/>
Household	Weatherization Assistance	Toggle	<input checked="" type="checkbox"/>
Household	Weatherization Date	Date	<input checked="" type="checkbox"/>
Household	Case Manager	Dropdown	<input checked="" type="checkbox"/>
Work Order	required CA	Text	<input checked="" type="checkbox"/>
Household	Application Packet	Multi	<input checked="" type="checkbox"/>
Member	Designated POA	Text	<input checked="" type="checkbox"/>

Outside of the Essentials package, Custom Attributes is the most powerful Kanso feature.

- Build data points around the information that is important to your agency, Tribal leadership and community.
- Simple to add or remove as needed
- Track data on individuals, households, units, inspections, work orders/charges, etc.
- Build custom reports for these data points in the Analysis Reporting Tool.

Kanso Feature: Browser Tools

Running in Parallel

Control + F

Zoom In / Zoom Out

Quick Search Functionality

→ What can be searched?

The image displays two browser windows side-by-side, illustrating the 'Kanso Feature: Browser Tools'. The left window shows a user profile for Bruce Banner, including contact information and household details. The right window shows a report titled 'All Household Members' with a table of household data and various filters on the right side.

PPU	Mailing Address / Phone	Name	Relation	Birthdate	Age	Gender	Disables/Handicap
HCV-001-2		Selberg, Andrew	H	10/22/1992	31	Male	No
HCV-001-3	4759 Big Walnutview Court Columbus, OH 43230 3035172968	Elizondo, Halle	H	1/29/1995	29	Female	No
		Elizondo, Ember	Y	1/1/2019	5	Female	No
		Elizondo, Willow	Y	1/1/2022	2	Female	No
HCV-001-4		Le, Khang	H	10/2/1999	24	Male	No
PH-M-0001	5555551234 200 Curry Ln Denver, CO 80209 5555506398	Van Dyne, Janet	H	2/10/1953	71	Female	No
PH-M-0003	220 Curry Ln Denver, CO 80209 5555501185	Prince, Diana	H	10/9/1958	65	Female	No
PH-M-0004	210 Curry Ln Denver, CO 80209 5556663563	Parker, Peter	H	5/10/1996	28	Male	No
		Watson, Mary Jane	S	8/14/1990	33	Female	No
PH-M-0005	335 Curry Ln Denver, CO 80209 5555508546	Foster, Jane	H	5/10/1985	39	Female	No
PH-M-100		Dent, Harvey	H			Male	No
		Dent, Two Face Jr	Y			Male	No
PH-M-4	350 Milano Ct Denver, CO 80206 5555523652	Banner, Bruce	H	2/25/1971	53	Male	No
PH-SC-0001	5553336969	Wayne, Bruce	H	1/1/1973	51	Male	No
		Dawes, Rachel	S	2/2/1988	36	Female	No
PH-SC-0002		Cool, Joe	H				No
PH-SC-0003	350 Milano Ct Denver, CO 80206 5555523652	Banner, Bruce	H	2/25/1971	53	Male	No
PH-SC-0004	10880 Malibu Point Malibu, CA 90265	Stark, Tony	H	9/25/1974	49	Male	No

Thanks so much for you Participation

Any questions about the information from this session?

If you would like to review your current Kanso feature set, add tools or features, or complete a Kanso site review to increase your efficiency please contact me.

James Gutierrez

Senior Account Manager

jamesg@kansoftware

303-308-1000 x 140

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Summit Agenda for Remainder of Day

- Closing out your Books in Kansa - 10:15 am
- Lunch - 12:00 Noon
- Kansa Success Tools - 1:00 pm
- Keep your Kansa Site Current & Safe - 2:15 pm
- Homeownership in your Community: Kansa Loan Tracking & Home Conveyance - 3:30 pm
- Closing Session - 4:00 pm

Evening Reception at the ART Hotel