



NEW UNIT CHECKLIST

Owners Name: _____	Unit Address: _____
Owners Address: _____	LTA ID#: _____
_____	Unit Phone #: _____
Home Phone: _____	Effective Date: _____
Work Phone: _____	Referred By: _____

● **Management**

- _____ Create owner master file
- _____ Copy of contract to owner
- _____ Create computer owner file
- _____ Complete special instructions
- _____ Received copy of insurance
- _____ Schedule set-up
- _____ Enter all existing reservations
- _____ Enter comments in sales field (Step 79)
- _____ Take photos and submit w/this form
- _____ Contract/cleaning worksheet to Mgmt
- _____ Setup appt to meet w/Housekeeping
- _____ Inspector while owner is in house

● **Maintenance**

- _____ Create maintenance file
- _____ Obtain all unit keys/master set
- _____ Make four front desk keys
- _____ Make housekeeper key sets
- _____ Fax telephone info to B/F
- _____ Inspect property/install sign & phone
- _____ Assign spa service vendor
- _____ Assign snow removal vendor
- _____ Assign landscape vendor

● **Housekeeping**

- _____ Create housekeeping master file
- _____ Create housekeeper file
- _____ Schedule unit evaluation
- _____ Calculate housekeeper payment
- _____ Assign to housekeeper
- _____ Update "PROLST"
- _____ Verify minimum inventory
- _____ Update inventory in master & owner file
- _____ Create walk away inventory
- _____ Send inventory copy to owner
- _____ LTA Setup Scheduled
- _____ LTA Setup Completed

● **Reservations/Front desk**

- _____ Make new key drawer
- _____ Create Map

● **Accounting**

- _____ Create owner statement file
- _____ Update referral payment ledger

Special Instructions:

Additional Comments:

cc: VP Ops, Maint, Hskping, Reservations, Accounting, Original to GM

Revised 05/27/03

APPROVED FOR PAY: JIM MORRIS _____ DATE: _____
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Special Instructions for Home:

Owner: _____

Address: _____ Unit#: _____

Warranty Information: _____

Alarm Company: _____

Instructions: _____

_____ Posted: _____

Hottub Maintenance Co.: _____

ON/OFF Jets Switch Located: _____

Combination: _____ Instructions & Combo Posted: _____

Requested Vendors: _____

Cleaning Instructions or Special Products: _____

Other: _____
