Quick-Start Guide

RENTEC DIRECT

Learning The Basics

Your go to guide for getting up and running with your new Rentec Direct program today, including:

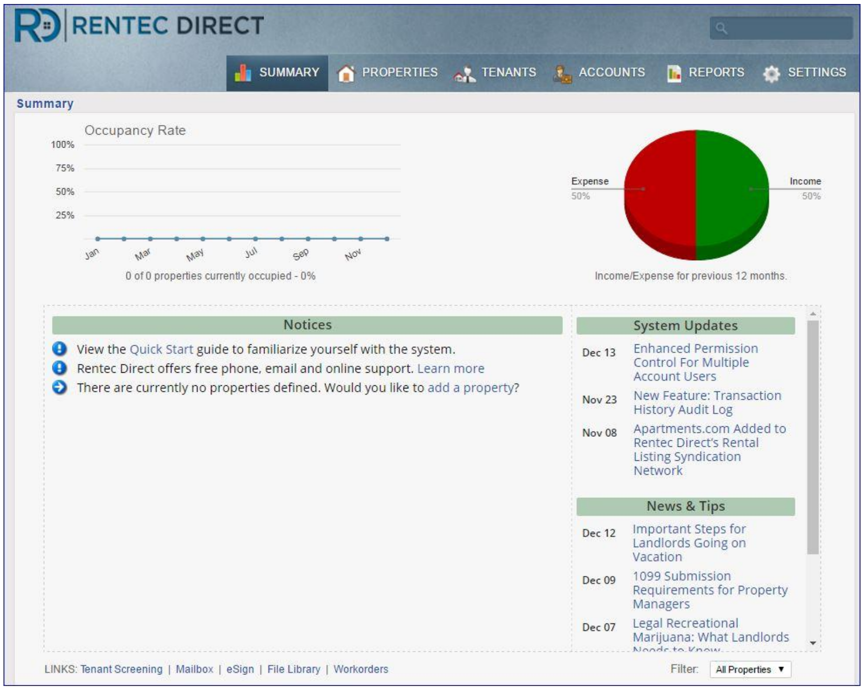
- How To Get Help
- Importing Data
- Setting Accounting & Program Defaults
- Adding Properties & Tenants
- Adding Bank Accounts
- Adding Owners & Vendors
- Posting Income & Expenses

Quick-Start Guide

Welcome to Rentec Direct!

It is very easy to set-up your new account! **Make sure to follow these recommended steps in order**. This will help you achieve optimal results in as few steps as possible.

For detailed instructions, watch our [Training Video at this link](#).



Need Help? Your Client Success Team is here to answer questions:

800-881-5139 or support@rentecdirect.com
Monday - Friday, 6am - 5pm, Pacific

Let’s Get Started

Navigation Tips

● Click on the **“Knowledge Base”** link at the bottom of your screen to access the online manual, full of helpful How-To articles and videos.

● The **“Need Help”** button in the top right of screen allows you to ask a question and review search results from our Knowledge Base or submit a question to the Client Success Team.

● **If you see a blue “?”** in the program, click it for useful advice.

● The **pencil/paper icon** is the EDIT icon throughout the program.

● **Right-Click** on any property or tenant to access a shortcut menu to edit, post payment, send an email, take notes, update leases or move-out.

● To open up **transaction details for ledgers**, click on the balance displayed in each tab.

● The **Notices that populate the Summary Page** are program generated based on your rental portfolio activity. You will see notices for maintenance requests, rental applications, pending documents, bank deposit options, lease expirations and delinquencies.

● **Blue text** throughout your program is an indicator of a clickable field that re-directs to a subject/task.

● **The Universal Search Tool** is located in each tab in the upper right corner and is used for searching across the platform.

● Each tab offers a Search Filter on the left side of your screen for quick searches within that tab.

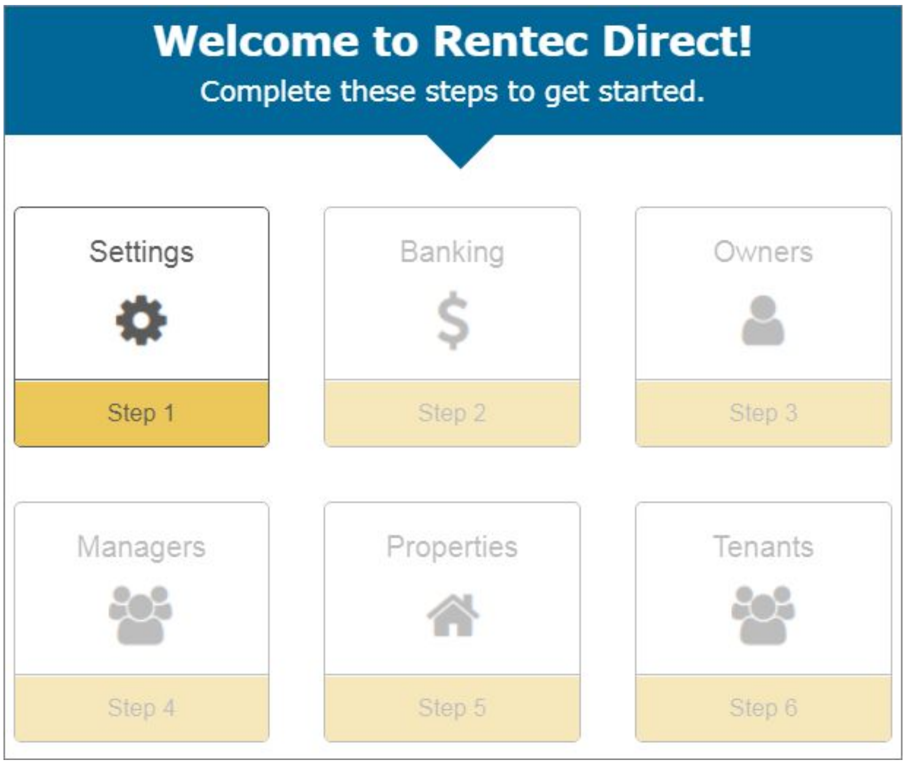
Step-by-Step Instructions

If you plan to activate the Electronic Payments or Tenant Screening features in your program, it is recommended you apply now.

- **EasyPay** allows tenants to pay rent, applicants to pay application fees, and Property Managers to disburse funds to owners, all electronically. More details about the EasyPay program are at this link. For application instructions, Click here.

- **Cash Payments** allows tenants to submit cash payments electronically from over 20,000 payment locations. Click here to learn more.

- **Tenant Screening** tools are available in your account immediately. If you wish to order Credit Reports, a simple electronic application form is needed. Click here for more details.



Step-by-Step Instructions

Follow the links for more detailed instructions.

While it is not necessary to complete all fields when adding Properties, Tenants, Owners, Managers and Vendors, **entering each in the order below and using as many details as possible is recommended and will save you repeat steps later.**

1. **Data Import** is easy! Free spreadsheet import tool available for 25+ rentals.

2. **Review All Settings** in the Settings Tab and pay special attention to your Accounting & Program Defaults.

3. **Add Bank Accounts** through the Accounts Tab. To enter a starting balance, click on the Accounts Tab, click on the balance for the Bank Account, and select the "UPDATE BALANCE" button in the upper left.

4. Welcoming Tenants & Owners at this point will notify them in advance about the built-in Portals you will be activating in the next steps as those steps generate emails.

5. **Add Owners** (PM Version) through the Accounts Tab. *****If you wish to activate owner portals, doing so at this stage will save having to backtrack*****

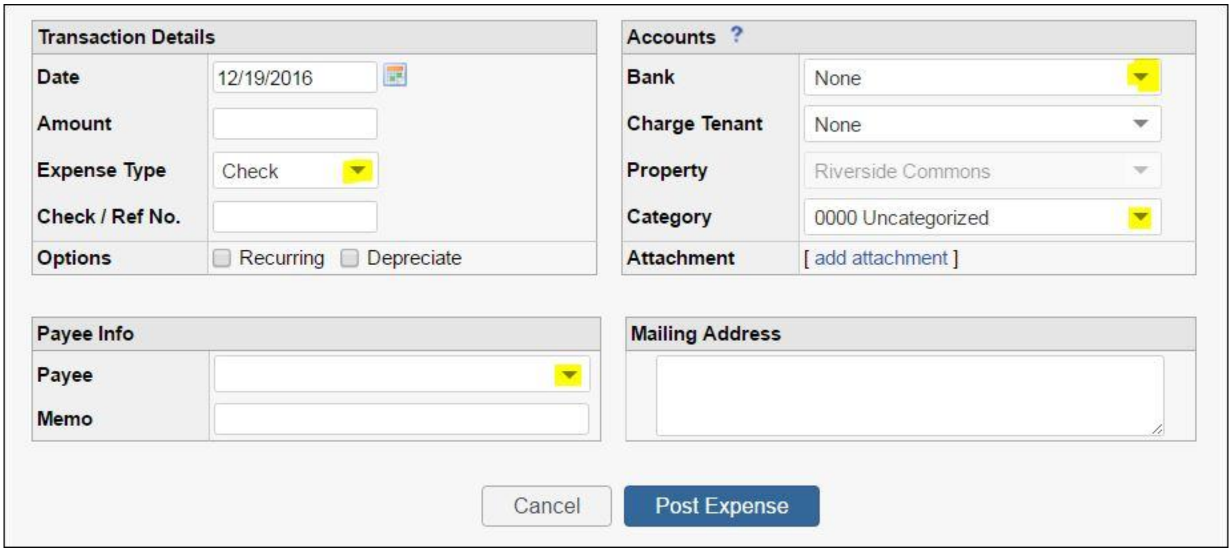
6. **Add Sub-Users** through the Settings Tab/Manage Users

7. **Add A Property** through the Property Tab by clicking on the “Add a Property” button. Link in Bank Accounts, Owners and Property Managers, as well as define your **Management Fee** structure here.

8. **Place Tenant In Property** through the Property tab by clicking on the “Place New Tenant" link. Notice that you are able to list an original move-in date and a different "begin charges on" date. The date you list as "begin charges on" will generate historical rent charges from that date forward. *****If you wish to activate automated tenant emails & tenant portals, doing so at this stage will save having to backtrack*****

First Transactions

Posting Income & Expenses



- **Add Vendors & Payees** through the Settings Tab or on-the-fly, when posting a transaction by simply typing their name in the Payee field.

- **To post an Income or Expense transaction**, use the red **$** or green **$** buttons, located in the far right column, in the Property, Tenant or Accounts Tabs. Be sure to post the transaction in the correct Tab. **To create meaningful financial reports based off of posted transactions, create your own custom Income & Expense categories under the Settings Tab.

- **Post Tenant Rent Payments** through the Tenant Tab by clicking on the green **$** button as well as directly through a Tenant's ledger by clicking the "**$ Post Income**" button.

- **Post Tenant Security Deposit Payments** through the Tenant Tab by first clicking on the Tenant ledger balance and then clicking the "**On Deposit: 0.00**" button.

Congratulations!

You have learned the basic steps to begin using your Rentec Direct account.

Beyond the Basics

RENTEC DIRECT

You are ready to delve into the more detailed aspects of the program with the *Beyond the Basics - Advanced Features Guide* and through the *Educational Webinar Series.*

Need Help? Your Client Success Team is here for you.

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