Beyond the Basics

Advanced Features Guide

Explore the Advanced Features of your Management Software

- Management Features
- Communication Tools
- Accounting Features
- Marketing & Advertising

Beyond the Basics

Advanced Features Guide

The Quick-Start Guide was your first introduction to Rentec Direct, providing you the necessary steps to get moving in the program.

Now that you have learned the basics, you are ready to delve into the more detailed aspects of the program!

Take a peek at the **Table of Contents** on the next page to jump to the feature you're most eager to start using. Or read through the complete guide to explore every valuable feature.

Need Help? Your Client Success Team is always here to answer questions 800-881-5139 or success@rentecdirect.com.

Make sure to leave a message if you call outside of normal business hours so we can help you first thing in the morning.

Table of Contents

Advanced Features Guide

Management Features	
Maintenance Tracking	p. 6 - 7
Custom Forms Editor & Template	p. 8 - 10
Marketing Your Rentals	p. 11 - 12
Online Rental Listing Syndication Network	p. 13
Tenant Lead Tracking	p. 14
Online Rental Applications	p. 15
Tenant Screening - Order Credit/Criminal/Eviction Reports	p. 16
DocuSign Electronic Signatures	p. 17
Tenant Photos & Social Data	p. 18 - 19
Manage Detailed Tenant Data with Custom Fields	p. 20
Renters Insurance Through Rentec Direct	p. 21
Communication Features	
Tenant & Owner Portals	p. 22-24
Custom and Automated Emails	p. 25-26
Text Messaging	p. 27
Introduce Owners to Rentec Direct	p. 30
Introduce Tenants to Rentec Direct	p. 31

Table of Contents

Advanced Features Guide

Accounting Features	
Payment Processing	p. 32
Printing Checks	p. 34
Pay-Out Management Fees	p. 35 - 36
Utility Bill Import (RUBS)	p. 37 - 39
Bank Sync	p. 40
CAM Tools	p. 41 - 42
Collections	p. 43
1099-MISC Tax Forms - Electronic Filing	p. 44
QuickBooks Export	p. 45
Transaction History Audit Log	p. 46 - 47
Administration Features	
Custom Website Creation	p. 48
Export Data	p. 49
Additional Program Users & Permissions	p. 50
Storing Files & Documents	p. 51
Set Up a Mobile App Shortcut	p. 52
Add Custom Logos to Reports	p. 53

Need Help?

Tips,Tricks & Shortcuts for your Software

Rentec's program is full of helpful tools to help you navigate the software and utilize the features effectively.

•Click on the **“Knowledge Base”** link at the bottom of your screen to access the online Knowledge Base.

•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 your 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 details for ledgers**, click on the balance displayed in each tab.

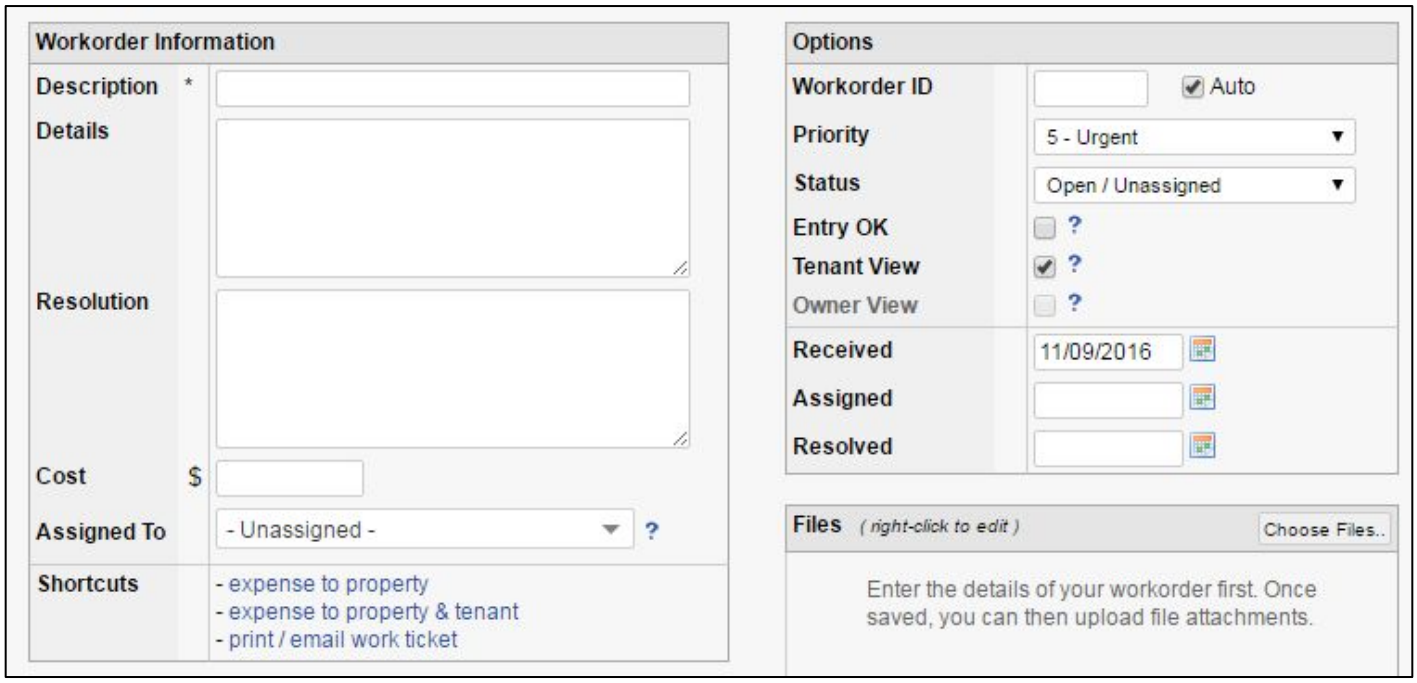
Still have questions?
Give your Client Success Team a call at 800-881-5139.

Maintenance Tracking

Maintenance Requests & Work Orders

To create a work order from your program, click on the Property tab, right click on the property name and select Work Orders. From here you will see a list of open Work Orders, and on the left of the screen, you have the option to create a new work order or view closed work orders.

Once you've selected "Add New Work Order" you can begin to create your work order.



From this screen, you are able to enter in an expense for this repair, upload any photos or documents, set a priority status and print or email the work ticket.

To email the work ticket, follow the "print/email work ticket" link and use the email icon in the upper right corner.

Maintenance (cont.)

View or Edit Work Orders

View, Edit or Close Work Orders

Once you have saved a work order, you will see a wrench icon appear next to the property name, indicating you have an open work order. If you click on the wrench icon, you can v**iew a list of open work orders for this property, edit a work order and view closed work orders.**

To view a list of all open work orders, follow the link on the bottom of the Summary Tab

Generate a Report of Open or Closed Work Orders

To pull a report showing open and closed work orders for your property, click on the Reports tab and select the sub-tab Misc. Reports.

Allow Tenants to Submit Maintenance Requests

Tenants portals are automatically set to have the option to submit work orders and the program is also set to email you a notice of work orders submitted (to your contact email address under Settings.)

To turn off these options, click on the Settings tab and Program defaults and change these setting.

To find more information about Work Orders CLICK HERE

Forms Editor

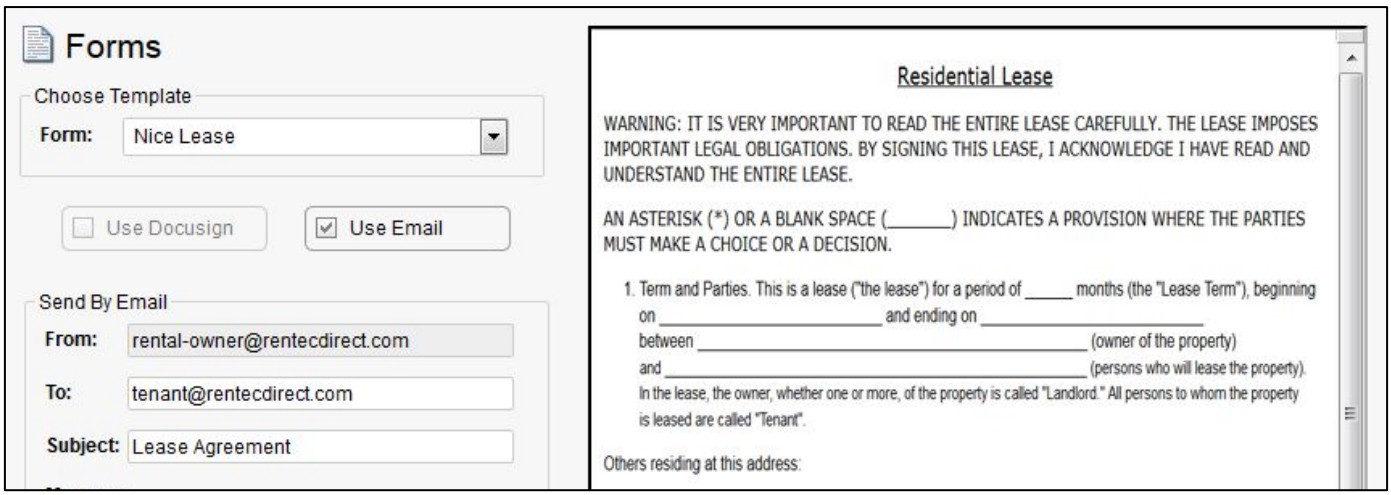
Create Custom Forms and Templates

This tool is especially useful for creating custom lease agreements and other tenant notifications. You can even include electronic signature features to easily sign important documents online.

Use the Forms Editor to create a document with data fields that will automatically pull relevant tenant or property information and automatically input them into the form for you.

Forms are like templates that will be populated with information at a later time.

The following steps review basic instructions for creating Forms in your Rentec Direct account. For more detailed instructions click here.



Forms Editor (cont.)

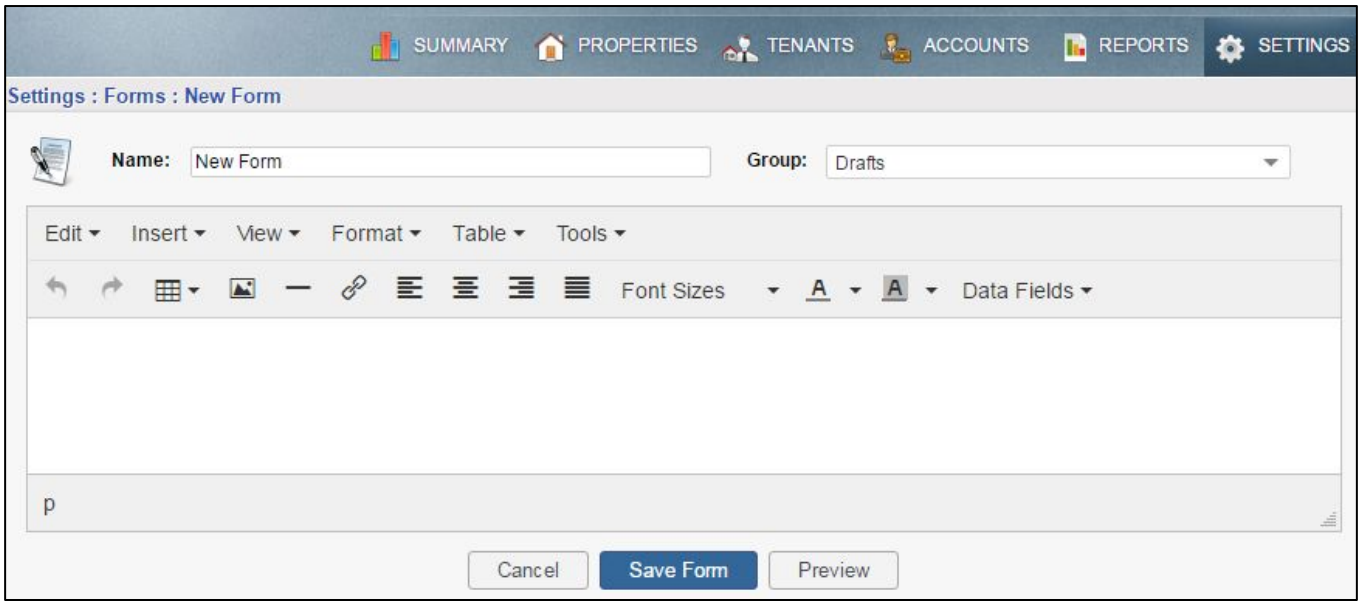
Instructions for Custom Forms Templates

1. Visit the Settings Tab, select the option labelled "Forms"

2. To add a new form click "Add Form" on the left side of the page. *New forms are created with some default content and data fields to help you get started and are automatically saved in the Drafts group.*

3. To add content to the form, click within the content area and begin typing or pasting content.

4. You can insert additional database fields by clicking "Data Fields" on the top right, which will open a menu for you to choose from.



Forms Editor (cont.)

Helpful Tips for Custom Forms Templates

Data Fields

Enter database merge fields in the body of your message to have the system automatically insert those values. Use the Preview button to test with sample data.

For example, if you entered:
"Hello %first_name% %last_name%,"

The document would read:
"Hello Joe Smith,"

Copy an existing document into Rentec Forms

If you have an existing document and want to copy it into Rentec Direct's form system, the way to do this is via copy and pasting it over.

The Forms Editor will attempt to maintain formatting; however, depending on the source sometimes the document formatting may need to be manually corrected to look right. You can press the Preview button at the bottom of the page to see what the document will look like when printed at any time.

TIP: If the formatting does not carry over well, it's often best to paste without formatting using CTRL-SHIFT-V instead, then do the formatting within the Rentec editor.

Marketing Your Rentals

Online Rental Ads and Syndication

To begin marketing your property, right-click on the property name (in the Properties tab) and choose 'Marketing Info' from the menu.

Enter the details for the property as requested by the form. The Contact Info that you enter on this form will display on your website and other online listing sites.

To begin advertising your rental, check the box next to the 'Publish Online Listing' option. This will post the property to the Rentals tab in your Rentec Direct custom website and the listings website page.

Checking the 'Enable Syndication' option will send the listing to Rentec Direct's syndicating partner sites immediately (however, it can take up to 72 hours for the listing to be published on their sites).

To accept online rental applications, check the box next to the 'Accept Online Applications' option. Further instructions for setting up your rental applications can be found here.

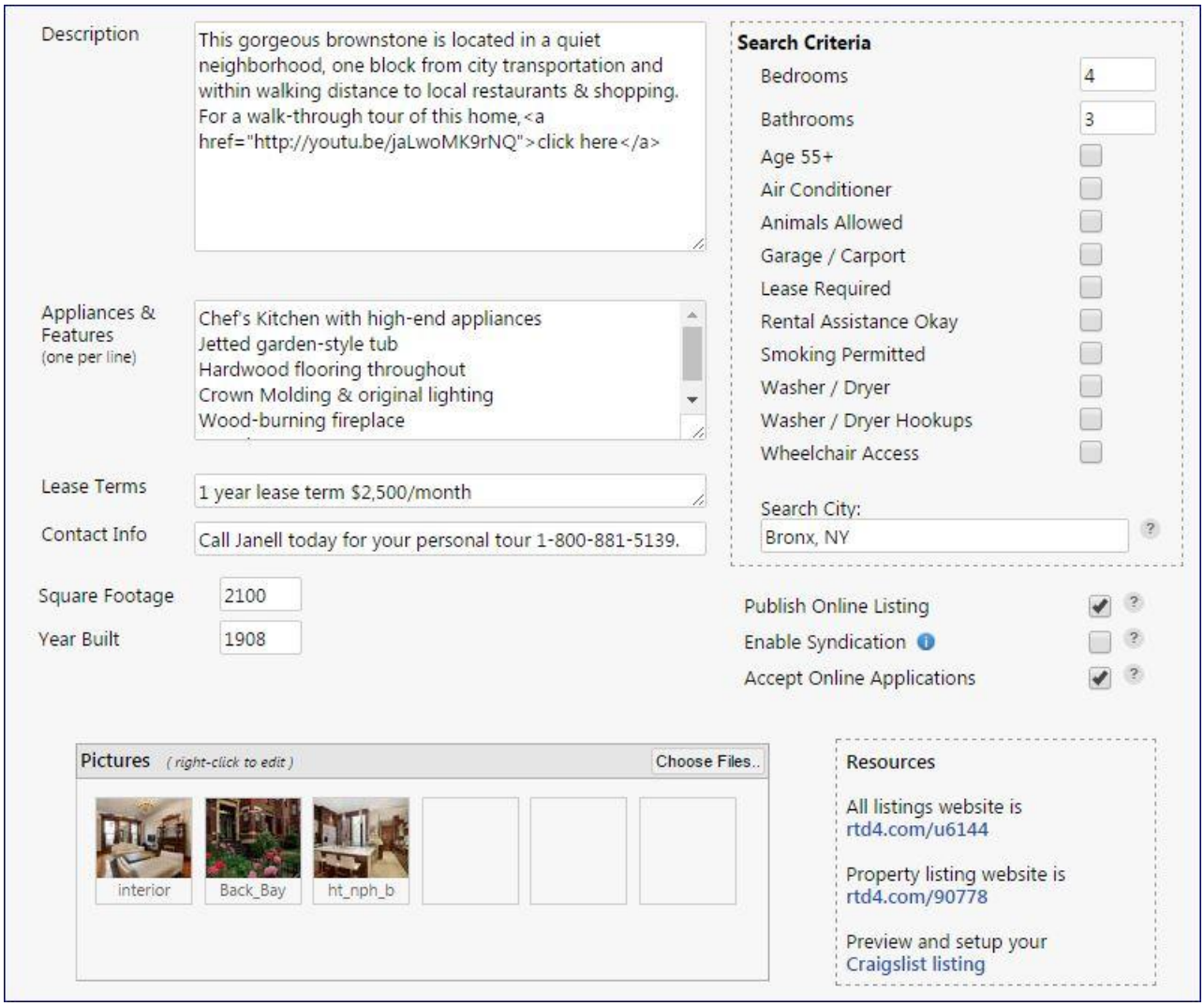
Upload property photos. Once uploaded, you can arrange the display order by right-clicking on one of the images.

Save and Post. Once you have entered all of the appropriate information and all of your settings are configured, click the 'Save Property Profile' button to save your changes and post your listing.

Marketing Your Rentals

Creating Online Rental Ads

Take note of the website links in the lower right corner in the "Resources" box. These links can be used to link into an outside website or if you do not plan to utilize Rentec Direct's free website tool, they can be shared as a marketing web address.



Rental Listing Syndication

With Rentec's online syndication network your listing automatically published to these popular sites you are guaranteed more exposure.

Simply click the Enable Syndication button on your marketing page to send it out to the following rental listing sites all at once.

- **Apartments.com** listings will also be featured on **ApartmentFinder.com**, **Doorsteps.com**, and **Move.com**.
- **Zillow**
- **Trulia**
- **Realtor.com**
- **Rent.com**
- **HotPads**
- **Rentals.com**
- **Homes.com**
- **RentPath**
- **Craigslist**
- **Rentbits**
- **HouseRentals**

There's more! We also automatically publish your vacancies to **Rental.vast.com, RentCollegePads.com, Yakaz.com**, **hunt.com**, **Oodle**, **RentNice**, and **Trovit**.

You can also quickly make a great looking Craigslist ad by clicking the 'Craigslist listing' link on the right after you save your details. We create a Craigslist ad for you; however, per Craigslist policies it has to be posted manually.

Tenant Lead Tracking

Capture Leads and Match Tenants to Vacancies

Rentec Direct's lead tracking goes beyond traditional lead management systems and automatically matches a prospective tenant to your available properties. Learn More>>

Depending on the lead source (email, phone call, or online inquiry) you can create a prospective tenant profile, sometimes referred to as a " Guest Card", that contains a tenant lead's interests. If a prospect finds you online they can fill out their own "Guest Card" about their ideal rental property.

To activate the new Tenant Lead Management Feature:

- Visit Settings -> Program Defaults.
- Check the "Yes" button next to "*Use tenant lead matching system?*"
- Save your settings
- Then click the Tenants tab on the navigation bar. You will see in the left actions pane a new toggle selection for Tenants and Leads, allowing you to switch between them.
- If your public marketing website is active, visitors will see a Search tab, allowing them to find your properties based on each property's marketing description.

To allow leads to save their own Guest Cards/Property Search on your marketing site:

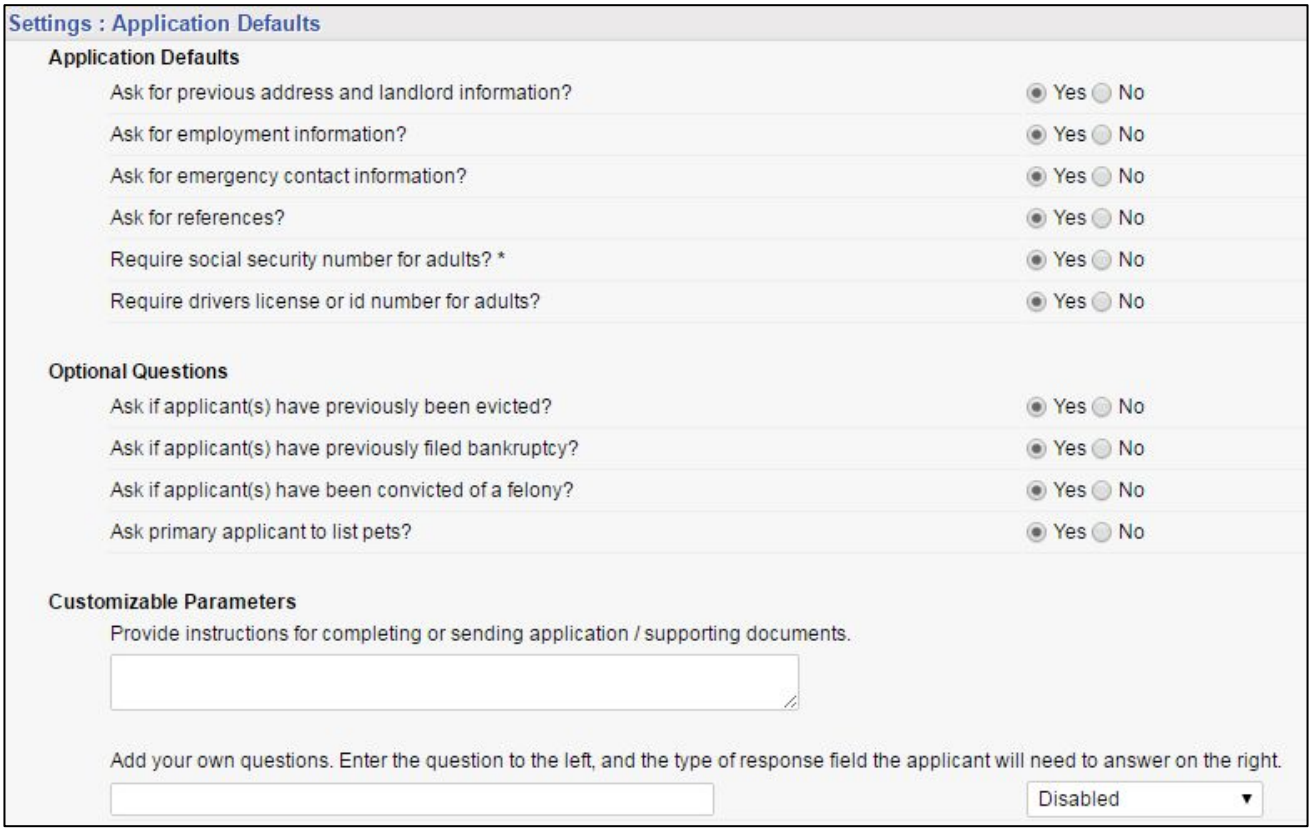
- Visit Settings -> Program Defaults.
- Check the "Yes" button next to "*Allow Leads to save searches on Listings site*?"
- Save your settings
- Prospective tenants can now save their search criteria on your marketing website. They will be sent an email containing links to edit their saved property search or unsubscribe from available property notifications.

Property Searches are linked to the tenant lead's email address and saved in the system. If a new property in your account becomes available, you can easily send an automated email to the lead to check out the newly available properties that match their search criteria.

Online Rental Applications

Customize Your Online Rental Applications

To customize your online application, head to your **Settings Tab**, and select **Rental Application Defaults**.



File Attachments to Rental Applications

Your renters will be able to attach supporting documentation to the online rental application, like copies of a driver's license or pay stubs. You will notice an option to "allow file attachments to application" when customizing your rental application to enable this feature.

Collect Online Application Fees

To learn more about how to collect online rental application fees via EasyPay CLICK HERE.

Tenant Screening

How to Get Setup to Order Credit Reports

Your Rentec account gives you advanced options to order Credit, Criminal, and Background reports for Tenant Screening.

Your account is already enabled to order **County, State, and National Criminal Reports, Inmate Records, Sex Offender Reports, National Eviction Reports, SSN Validation with previous addresses,** and **Bankruptcies/Judgments/Liens reports.**

To access these reports today, login and go to the Reports tab, and click 'Screening Reports'.

How to Order Credit Reports for Tenant Screening

The *Fair Credit Reporting Act* requires that you complete a credit access application with us before you can start ordering credit reports through our program.

Rentec offers you 2 types of credit reports:

- **Tenant Credit Report Cards**

  Click the following link to see an example:
  https://www.rentecdirect.com/details/images/credit_report_card.pdf

- **Full Tenant Credit Reports** (requires a simple site inspection with a one time $50 inspection fee)

  Click the following link to see an example:
  https://www.rentecdirect.com/details/images/pm_tenant_credit_report.pdf

The credit access application can be filled out and submitted online by clicking the link displayed on the screen in the program, or it can be downloaded and then sent to us.

Simply click on the link under 'Screening Reports' in the Reports tab that asks you "***Want to also order Credit Reports?***" to start.

For more details on setting up credit report access visit this page: How to Get Setup to Order Credit Reports.

DocuSign eSignatures

Electronic Signatures via DocuSign

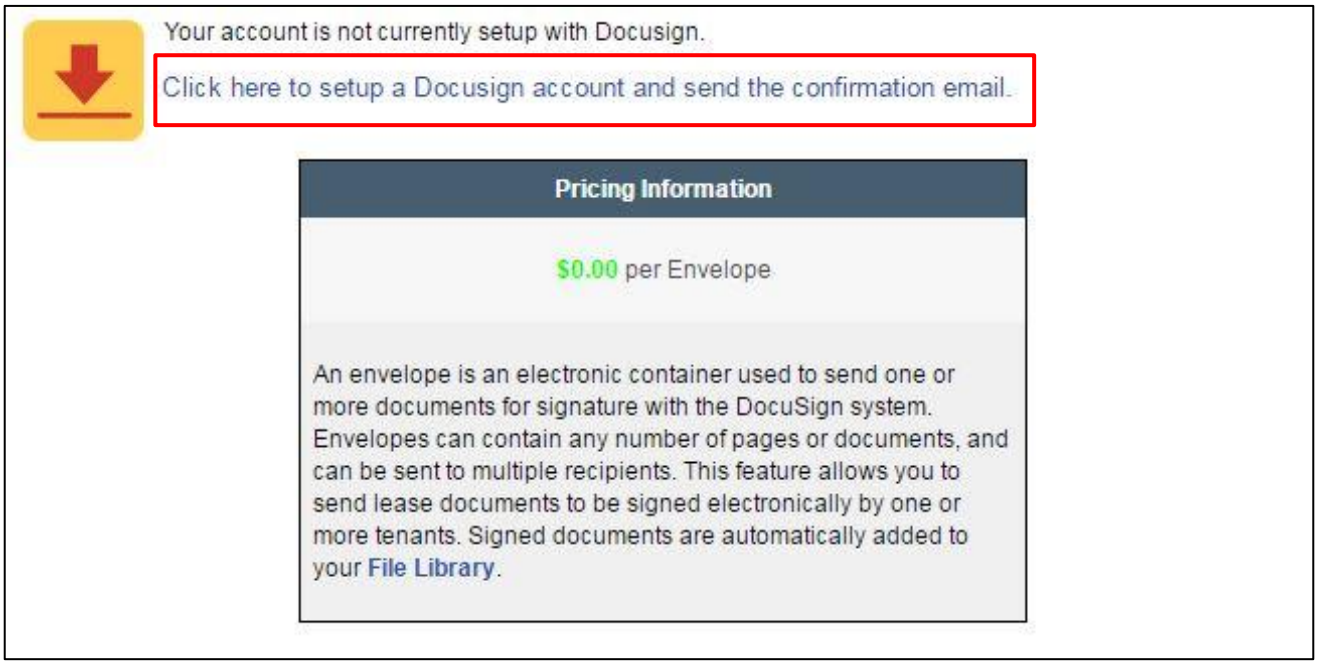
Every form created within Rentec has the option to be sent to your tenants, owners, or vendors and signed online via DocuSign.

Your software is fully integrated with DocuSign, the leading provider of legally enforceable eSignatures, to make the process easy for you and your tenants/owners/vendors.

Setting up DocuSign for your Rentec Direct account

1. Click on Utilities under the Settings tab.
2. Click on DocuSign Configuration.
3. Click on the blue link to setup a Docusign account.

For more details about sending files via DocuSign CLICK HERE



Tenant Photos

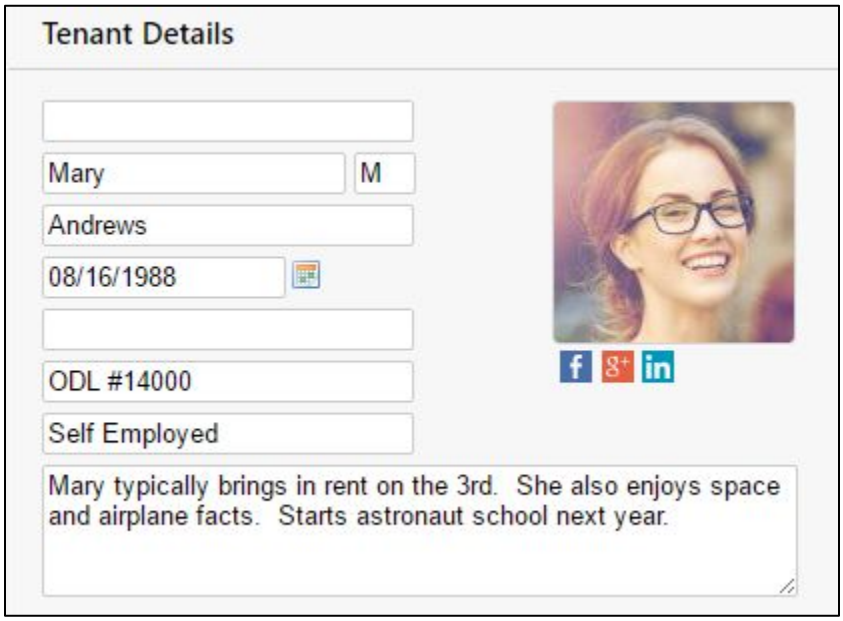
Tenant Photos & Social Network Data

Rentec Direct allows you to attach a photo to each tenant profile.

To add or change a tenant's picture, simply right click on a tenant's name to edit the tenant and click on the thumbnail image (top-right) of the edit panel.

Don't have a picture? No problem!

There's a good chance your tenant has a social account. Rentec Direct has integrated with Facebook, Google+, LinkedIn, and Twitter to automatically display the profile picture from the tenant's social media account, which is already publicly shared with the world. This information comes from their email address, so be sure to have a valid email address on file.



Tenant Photos (cont.)

Tenant Photos & Social Network Data

If your tenant has a social account tied to their email address, right under their picture you will see small social icons. Each of these, when clicked, will open a new tab in your browser to their social account.

In an ever more connected world, and with more social usage than ever in history, this provides you a simple way to help keep you connected to your tenants.

Once updated, your Tenant Tab will be filled with photos of your current tenants, helping you put a face to the name of your renters and personalize your manager-renter relationships.

Track Tenant Details

Save and Manage Detailed Tenant Data with Custom Fields

Custom Fields give property managers and landlords the ability to add more detailed information about their tenants, owners or properties that will be saved within the system. For example, when editing a renter's information you can input a tenant's car details and license plate number, along with their contact information, and rent amount.

These details can later be pulled by the Forms Editor to create lease agreements and other forms that auto-populate with the Custom Fields data, saving you from manually entering the data – talk about a time saver!

Learn more about the types of data you can store and use with Custom Fields: Click Here

How to Set Up Custom Fields

The new Custom Fields tool allows account Administrators to add fields to Owner, Property, and Tenant records.

Creating a Custom Field

- Go to the Settings Tab and you will find the Custom Fields tool at the bottom left of the page.
- Click the "Add Field" button under the record type you want to add a custom field to- you will see options for Tenant Fields, Owner Fields, and Property Fields.
- Enter a short field name into the new input and save your changes. The shorter the better!

Use Custom Fields in Your Lease Agreements & Other Forms

The custom field data can be pulled into forms created in the Forms Editor.

When editing a form, look for the custom field name under the Data Fields menus to insert the placeholder. The system automatically pulls the information from your Tenant, Owner, or Property Custom Fields data to populate the form when it is created!

Renters Insurance

Renters Insurance Features for your Tenants

The Renters Insurance features in Rentec Direct allow you set your renters insurance requirements for each property and tenant. If your tenants already have a renters insurance policy, they will be able to submit proof via the Tenant Portal for you to track compliance.

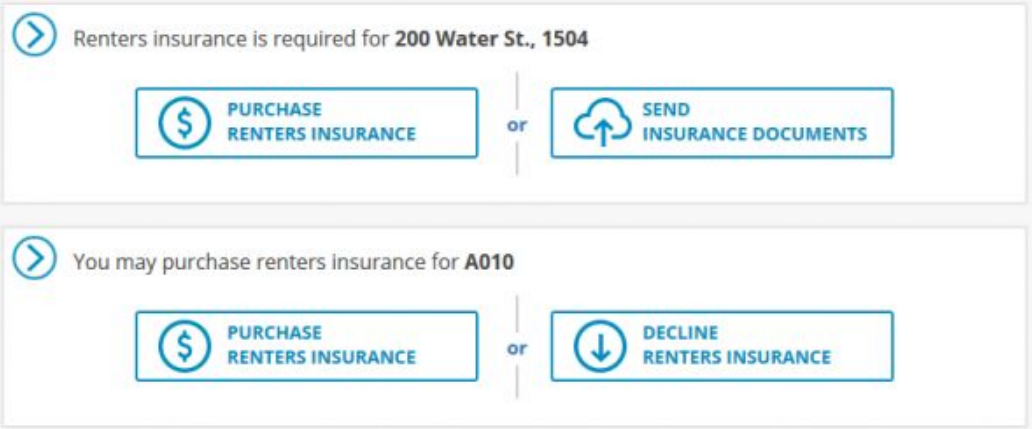
If your tenants do not have their own renters insurance, they can access the Sure App portal via the Tenant Portal to shop for an affordable policy for their needs.

Discover how to customize your Renters Insurance options and set up insurance requirements for each property and tenant here: Renters Insurance Instructions

Online Insurance Purchase

When the renter chooses to purchase insurance online, our Sure App partner portal is presented. Through Sure, the renter completes a questionnaire that is used by the broker to determine rates. Tenants can select from a variety of the top insurance providers for a policy that fits their needs.

Completing this process creates a pending insurance record that will automatically be activated in the Rentec Direct system when confirmation of the purchase is received from Sure. If the renter chooses to cancel the insurance policy, the system will be automatically notified.



Tenant & Owner Portals

Tenant Portal

The tenant portal allows your tenants to log into their account using a unique username and password to make their electronic rent payments, submit work orders, and receive direct communication about their rental. Additionally, tenants can review their statements, and make minor setting changes, such as email address updates and email receipt preferences.

For **step-by-step instructions on setting up a Tenant Portal** CLICK HERE.

Mobile App for Your Renters -- Discover Resident Connect by Rentec Direct

Owner Portal

The Owner Portal allows a property manager to provide their owners with an online account, accessible via desktop or mobile, to view real-time property performance.

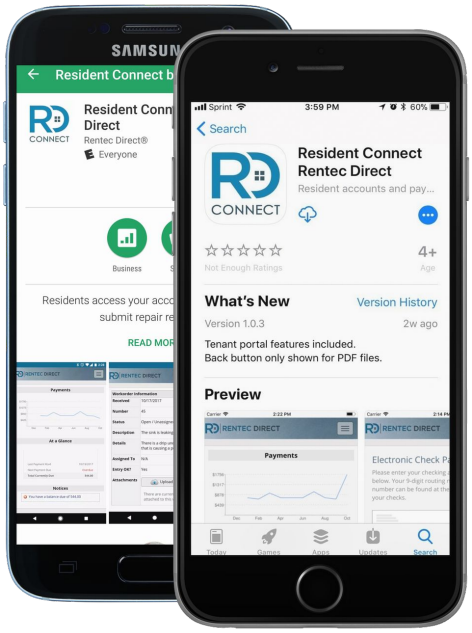
Owners can view simplified data of overall property performance, view files and attachments that you share with them, pull five custom reports, view work orders and see more detailed ledgers for their properties.

For **step-by-step instructions on setting up an Owner Portal** CLICK HERE**.**

Mobile App for Your Property Owners -- Discover Owner Connect by Rentec Direct

Mobile App - Resident Connect

Resident Connect by Rentec Direct



Resident Connect is a mobile app of the Rentec Direct Tenant Portal. Through the app, your renters can pay their rent online, submit maintenance requests, review statements, and check property notices. The Resident Connect mobile app also gives your renters access to a File Library, where you can share copies of lease agreements, notices, addendum, and more.

Available in the [Apple App Store](#) and [Android Play Store](#) for your smartphone or tablet.

Download the App

Search for “Rentec Direct” in the Google Play store or the Apple App store.

Send your renters to the app store for their mobile device to download Resident Connect by Rentec Direct. Resident Connect by Rentec Direct is designed to work with smartphones and tablets.

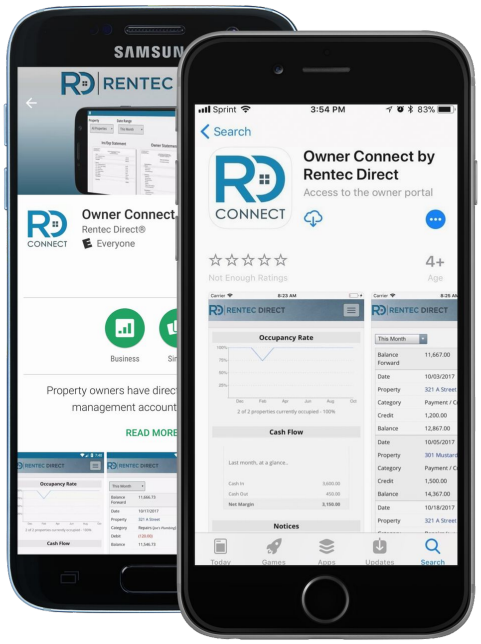
Resident Connect is the mobile app for your renters. You will need to enable the “Tenant Portal” for your tenants in order for them to log into the Resident Connect app with their email and password.*

When searching for the app, you might notice the Owner Connect by Rentec Direct, another mobile solution for Rentec Direct property managers. Make sure to tell your renters to download the Resident Connect by Rentec Direct app to access their Tenant Portal.

Lear More >> New Mobile App for Your Rentec Direct Renters

Mobile App - Owner Connect

Owner Connect by Rentec Direct



Owner Connect is a mobile app of the Rentec Direct Owner Portal. The Owner Portal is a valuable tool for your property management business to allow your owner clients to log into an account with their own username, where they can see occupancy rates, incoming rent and view all types of reports.

Available in the [Apple App Store](#) and [Android Play Store](#) for your smartphone or tablet.

Download the App

Search for “Rentec Direct” in the Google Play store or the Apple App store.

Send your owners to the app store for their mobile device to download Owner Connect by Rentec Direct. Owner Connect by Rentec Direct is designed to work with smartphones and tablets.

Owner Connect is the mobile app for property managers who use Rentec PM and their owners. You will need to enable the “Owner Portal” for your owners in order for them to log into the Owner Connect app with their email and password.

When searching for the app, you might notice the Resident Connect by Rentec Direct, another mobile solution for Rentec Direct renters. Make sure to tell your owners to download the *Owner Connect by Rentec Direct* app to access their Owner Portal.

Lear More >> New Mobile App for Your Property Management Owners

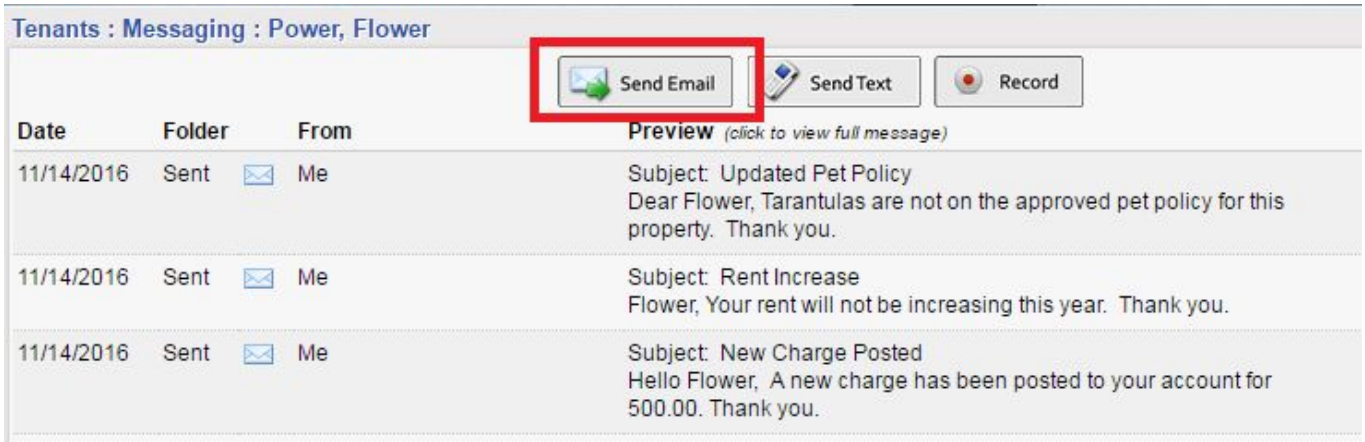
Custom Emails

Send Emails to Owners, Tenants, or Vendors

You can send individual emails or messages to groups of Tenants, Owners, or Vendors directly from your software. This feature creates an easy way to store your communication for your records.

How to Send Emails in Rentec Direct

Right click on the name of the Tenant, Owner or Vendor you wish to contact and select the Email/Text Msg option. You will see a page that displays all the emails and text messages that have been sent to this person via the software.



When a Tenant, Owner, or Vendor replies to your email, ***their reply will go into your actual email inbox and will not post automatically within your Rentec Direct program***.

However, if you would like their reply to show in your Rentec Direct program, click the RECORD button and copy and paste their email reply into the field for composing emails.

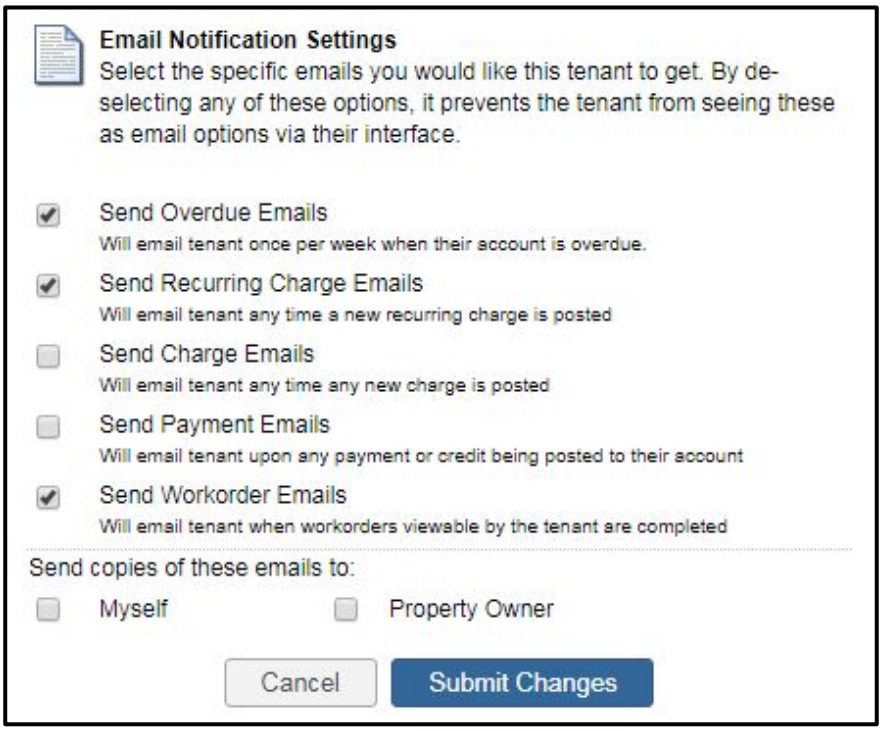
Automated Emails

Send Automated Notices via Email

You have the option to send automated emails to your tenants regarding Overdue Accounts, Recurring Charge Notices, New Charges, Payments and Resolved Workorders.

To select the email options for each tenant, right click on a Tenant's name under the Tenant's Tab and choose Edit Tenant.

Under Contact Info, select the option for Email Notifications and click the edit icon to choose which automated emails you want your tenant to receive.



To customize the automated email templates, go to your Settings tab and select Email Templates. From here, you are able to customize the auto-emails that are sent out to your tenants with your own text and selected fields.

Text Messaging

Messages to Tenants, Owners & Vendors

You have the option to send text messages to your Tenants, Owners and Vendors through your software.

A text message is delivered directly to the owner, vendor or tenant's mobile device in real time. The can reply directly to you and their replies (as well as your sent messages) are archived within the system for your future reference.

To send a text message directly to a tenant, owner or a vendor ... right-click on their account and select "Email / Text Msg" from the drop down menu. *HINT: The process is very similar to sending an email.*

Click the Send Text Button at the top of the next screen to open the Send Message window.

Here you can select an existing template, create a template, send to a group or compose a message that you would like to send directly to the tenant, owner, or vendor.

Message Length

When sending SMS messages to a recipient group, the editor displays a character counter at the bottom to help you keep your message within the 160 character limit. Bear in mind that when using data fields in a message, the actual data (such as a tenant's last name) may be longer than the placeholder %last_name%, so plan your message length accordingly.

How to View Unread Messages

When someone replies to a text that you've sent, the Summary screen will indicate that you have unread messages.

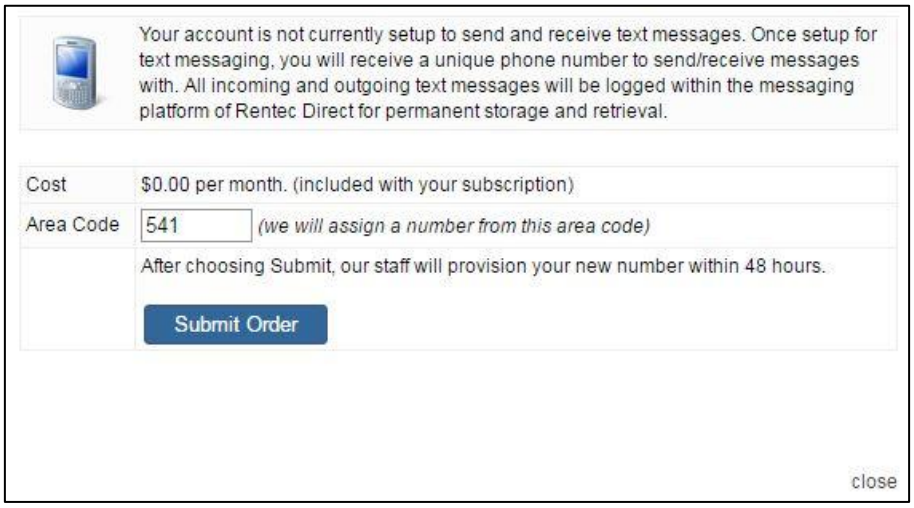
Text Messaging

To text Tenants, Owners and Vendors from your Rentec Direct account, you are provided with **a unique text messaging number.**

Text Messages With A Rentec Direct Text Message Number

You are able to use the system to send text messages to yourself, Tenants, Owners and Vendors by purchasing your own text number that Rentec Direct will set you up for. A Rentec Direct text number is free and included with your software.

To order a text number of your own, go to the Tenant's tab, right-click on their account, select Email / SMS from the menu and attempt to send an SMS message to the tenant. A screen will pop up letting you know that you are not setup for SMS and will ask you if you would like to go ahead and order an SMS number.



Send Text Message Reminders to Yourself (without a Rentec Direct Text Message Number)

You can send yourself any reminders or notes via text messages from the system as well. Once you select your unique text messaging number you can use it for all notes/reminders to yourself and your staff going out via our SMS number each month.

Group Emails/Messaging

Send Emails or Text to a Group

Group messaging functions allow you to send the same message to a group of tenants, owners or vendors.

You can send an email or text messages to:

- all tenants
- all owners (for property managers)
- all tenants within a single property group OR
- all owners within a single property group
- all Vendors

For a Multi-Unit Property (duplexes, triplexes, apartments, etc.)

1. Right-click on any Multi-Unit Property
2. Choose Group Messaging
3. Click in the “To” Field if you want to include other groups
4. Select your Group(s)
5. Complete Email
6. Send Message

For A Single-Unit Property, Follow These Instructions:

1. Go to Tenant Tab
2. Right click on a Tenant’s name
3. Choose Email/Text Msg
4. Click Send Email (or Send text at the top of the page
5. In the “To” Field, click the link that says “Send to a group”
6. Select your Group(s)
7. Complete Email
8. Send Message

For more instructions on sending Group Messages, complete with screenshots, CLICK HERE.

Introduce The Tenant Portal

Welcome your Tenants to their Online Portal

Once you have set up a Tenant Portal for your renters you will need to tell them how to access it so they can submit maintenance requests, view payment & charge history, schedule online rent payments and view shared files.

To begin using these tools completely, follow the links below.

1. Setup EasyPay Payment Processing if you want tenants to have the option to pay rent electronically
2. Your renters can securely input their own bank account and routing number in the tenant portal to initiate online rent payments via ACH.

To notify your tenants of their portal access, follow these recommended steps:

1. Create Your Tenant Welcome letter - follow this link for samples to download & edit.

2. After delivering the Welcome Letter & information about how to make rent payments online to your tenants, activate the tenants' portal. Click here for instructions.

You can also disable a tenant's ability to enter their own ACH information, on an individual basis.

Promote Online Rent Payments to Your Renters

Encourage your renters to pay rent online with the **Online Rent Payments Marketing Kit**

Additional Functions for Online Rent Payments

If you prefer to manually enter your tenant's information to set up online rent payments in the tenant portal, follow these instructions for obtaining Tenant Authorization for EasyPay Online Rent Payments.

Introduce The Owner Portal

Welcome your Owners to their Online Portal

Owners will need to be notified on how how to access their Online Portal so they can view statements, transactions, shared files, maintenance requests and pull their own financial reports.

Owner Portal Welcome Letters

- To print an Owner Portal Welcome Letter - click here
- To download an editable Owner Portal Welcome Letter - click here
  (Note: the file will automatically download to your computer)

Follow this link for another sample welcome letter you can copy to provide your owners regarding access to their owner portal and brief details on options for automatic owner disbursements into their bank account.

After delivering the Welcome Letter to your owners, you will want to activate the owner's portal. Click here for instructions.

Remember to collect and enter your owners' account and routing numbers if you will be handling owner disbursements through the EasyPay.

Payment Processing

Setup a Merchant Account for accepting online payments and disbursing funds.

Setting up a merchant account with Rentec Direct is very easy. We've taken all the steps to integrate with the banking system, ACH transaction network, and credit card processors.

To get setup with a new account through our partner, FORTE, follow these steps:

Setup EasyPay with FORTE

Visit Setting, Setup EasyPay. choose which method you would like to submit your information:

- **Option 1:** Use Electronic Agreement (fastest option)
  - The electronic agreement will walk you through the steps automatically

- **Option 2:** Download and complete the application packet and return it, along with the merchant application form located here and any requested supporting documentation from page 3, via fax to Rentec Direct: (888) 882-1062

The merchant setup process typically takes 7 - 14 business days.

Once approved, visit Merchant Account Setup Part 2 to complete your setup

- See the next page for commonly asked questions.

Payment Processing (cont.)

Frequently asked questions about Merchant Accounts

Q: Do I need to have a business checking account to have a merchant account?

A: Yes, you do as the transactions are reported to the IRS. (If you are an individual Landlord, you can still obtain a business checking account through your bank.)

Q: Can I use more than one bank account for depositing rent?

A: No, only one Settlement account can be tied to your Merchant Account, however you are able to use a separate bank account for merchant fees. Tenant and applicant payments are all deposited into one Settlement account. If you wish to send those funds to other bank accounts through Rentec Direct's software, you will need to have the PM version of our software and utilize the owner disbursement feature to ACH funds to an alternate account.

Q: What should I list under the Estimated Monthly transaction detail on page two?

A: The Average & Maximum Sale relate to an individual rent transaction. whereas the Monthly figure should project total possible rent collection.

Q: Why do I have to offer a Personal Guarantee for the Merchant Account?

A: The Personal Guarantee is needed to secure the account for liability reasons. As you can imagine, allowing individuals to transfer funds from bank to bank carries certain risks and the merchant account provider requires that the account provide a secure endorsement. Should your company wish to offer the Guarantee (rather than an individual), you will be asked to provide additional company documents, which traditionally include 2 years of financial documents.

Q: What is the general criteria for approval?

A: As merchant accounts are personally guaranteed, the principal must have a credit score with a minimum of 600 and have no open tax liens against them. Also, you will need to be able to be to tie the principal to the business (typically done thru the State Filing search).

Printing Checks

Print Checks Directly from your Software

You can easily print checks addressed to your vendors and owners directly from your software. Continue reading for instructions. For instructions complete with screenshots CLICK HERE.

1. **Visit Settings, Accounting Defaults**. Choose your check style. We support the most popular types of checks including 3-per-page, and 1-per-page with one or two vouchers. If you have not already set up a bank account to write checks from, do so at Settings, Manage Bank Accounts. You must have at least one bank account setup to write checks from.

2. **Make sure your Vendors (and Owners) are set up**, to save you time when entering expenses. To set up Vendors or Owners, click Settings, and choose either Manage Vendors & Payees or Manage Owners.

3. **To post an expense**: Go to your Properties tab, and post a new expense by clicking the red dollar sign or by right clicking on the property and choosing Post Expense. You can also do this within the properties ledger by choosing the Post Expense button on the top.

4. **From the Expense Type, select Print Check from the drop down menu.** Also select the Account from which this check will be drawn. Enter the Payee name. Verify the address, enter a memo and click Post Expense.

5. **Click the Accounts tab.** Next to the account you chose it will show something similar to [1 checks pending]. Click this to enter the check printing window. Select the checks you wish to print (or check the box in the upper left to select all). Enter your next check number, and if you are using 3-per-page checks, specify how many checks are available on your first available page of checks. Click Preview Checks.

6. **Almost done!** Your checks are created in PDF in order to ensure the text prints on the checks where it is supposed to. The PDF preview will show in the page. (If nothing shows, you may need to install Adobe Reader). Click the Printer icon, verify the settings and click OK.

Please create some sample checks and print on blank paper or disposable checks for practice before printing on actual checks.

Management Fees

Paying Yourself Management Fees

Rentec helps you combine your property management fees for multiple properties and create a payment to yourself or your property manager(s).

1. Go to your Accounts tab.
2. Right-click on the bank account you want to pay yourself (or your manager) from, choose "Pay Property Mgr".
3. Specify a date range on the left if the default is not what you desire.
4. Select the management fees you wish to include in this payment. The total of the selections will automatically display in the left column.
5. Click Next.
6. Your property management company will be automatically selected as the default payee. If you are paying a property manager, change the Payee to the manager or Add them here.
7. The category will default to "0000 Uncategorized". You can modify that now if you wish, and you can default it to a different category such as "Management Fees" by editing the new payee and following the instructions below.
8. Modify the Expense Type and Ref No as necessary. Most property managers will choose "Check" or "Print Check".
9. **Caution: do not** specify a Property for this transaction, leave it blank.
10. **Caution: do not** modify the Amount value.
11. Click "Post Expense".

Management Fees (cont.)

Frequently Asked Questions

What if I need to change something?

You can undo this transaction at any time by visiting the account ledger, edit the transaction, and delete it. You can then start over with step 1 above to correct any errors or make any changes.

How can I tell what property based management fees are associated with each payment?

Once you post the expense, you can visit the account ledger, and edit the transaction. In the right column it will say "This transaction is part of a PM Payment. [view report]." Click "view report" to see all the affiliated property transactions.

You can also go to Reports > Financial Reports and pull the Vendor Ledger report after choosing the Bank Account on the left.

Can I default the category for the payment to something else?

Yes, visit Settings and click "Manage Vendors & Payees". Edit your property management account vendor (should be named the same as you have in the contact information) and/or your Property Manager vendors. Modify the default Category in the right hand column to what you wish the default to be and click Save.

For more information on Paying Yourself Management Fees CLICK HERE

Utility Billing Import (RUBS)

Automate Utility Billing with Service Providers

Rentec Direct property management software has support to automate your interaction with utility billing service providers such as ista.

The process is a 2-step process and can be done either by the property management staff or the billing service company if you provide them a login to your software.

Step 1 – Provide your billing service provider with a file of your tenant data.

1. Go to Settings, Utilities, and choose 'Download Utility Billing Data'
2. Configure your export with the following 3 options:
3. Output Format: Choose your billing vendor. We currently already support 'ista'; however, if you have an alternate vendor, please let us know and we would be happy to work with them also.
4. Properties to include: Select which properties you wish to export tenant data for. Any properties the billing service vendor bills on your behalf should be selected.
5. Days after move-out to bill: All tenants (except deleted tenants) will show on the report. To tell the billing service vendor to not bill expired tenants that have moved out X days ago, specify a value here for how many days. For instance, if left at the default of 30 day, any tenants who moved out greater than 30 days ago would not be billed.
6. Choose 'Download Report' and save the report to a location on your computer. You can then provide this file to your billing service vendor.

Utility Billing Import (cont.)

Automate Utility Billing with Service Providers

Step 2 – Import new utility billing charges into the system.

1. Your utility billing service provider will provide you a file which includes all the utility charges for your tenants. To import this file, go to Settings, Utilities, and choose 'Import Tenant Charges'.
2. Like before, choose the import format, and select the file from your computer, then click 'Upload File'.
3. You will be presented with a summary of the charges to be placed within the system. You will see the column number, the tenant name, description, and amount of the charge. An automated process within Rentec will review the data and highlight any invalid entries in red, and any suspect entries in blue. Carefully review all fields but pay special attention to any items in red or blue. Red items will not be imported since they contain a critical error. Blue items will import.
4. Once you have reviewed the data, either click 'Go Back' to choose a new file, or 'Import Charges' to proceed. Once you choose Import Charges, all charges will be automatically applied to the tenants within the system as of the dates specified within the import file.

Utility Billing Import (cont.)

Frequently Asked Questions

- **How do I edit the import file?**
  The file provided by ista or other billing service provider is going to be in a CSV (Comma Separated Value) file. These files can be opened by MS Excel, or any text editor. We recommend only viewing the contents in Excel and not editing as Excel will often modify the data unintentionally. The best way to edit the data if it needs to be changed prior to import is to use notepad or other text editor. Save the file, and re-try the import.

- **How do I provide my billing vendor a login so they can do the process on our behalf?**
  Go to Settings, Manage User Accounts and choose 'Add new user' and enter a username and password for them to connect with. Add the user then find the user in the user list and click on the permissions link to edit the permissions. Make sure the following items are marked Yes. 'Allow access to Utilities: Download Utility Billing Data' and 'Allow access to Utilities: Import Tenant Charges'.

- **Can I do a sample import to get used to the process?**
  We don't have a way to do a sample import; however, you can do a limited import so it is easy to back-out if there is a problem. Process step 1 normally, and in step 2, edit the import file with a text editor such as notepad and delete all but perhaps the top two or three lines. Proceed with the import and you can then view the tenants who got charges to verify they are accurate. If there is any problem, just void out the transactions you imported.

- **I don't use a meter reading service. I would like to automatically import charges from my own meters into Rentec using this method. Is it possible?**
  Yes, it certainly is. Download this sample file, remove the sample data and populate it with your charges. Then save the file as a CSV (Comma Separated File) file, and import using the same method described above.

Bank Sync

Download Bank Transactions to Your Software

Within Rentec, you can automatically synchronize your bank account at all major financial institutions (and small ones too) with your Rentec bank account ledger.

The feature functions much like what you may be used to in Quicken or Quickbooks where you can quickly download all transactions from your bank and match them to existing ledger entries or enter new ones.

There are two possible methods to download transactions from your bank...

1) Sync Your Bank with Your Rentec Direct Transactions

Rentec Direct's Bank Synchronization tool allows you to easily match actual transactions from your bank accounts with expense or income that you've recorded in Rentec Direct. This helps you reconcile what you expect to happen with what actually happens at your bank and in turn can help you track down those things that should have happened but didn't.

Rentec Direct will actually allow you to securely connect to supported banks, view your actual transactions, and match them to what you've entered into Rentec Direct.

Click Here for Instructions for Bank Sync and Account Reconciliation

2) MANUAL - UPLOAD A QFX FILE

If your bank does not support direct connect, or is not within the list of supported banks then you can download a QFX or OFX file from your bank. Pretty well every bank in the world supports this method, even if they do not support direct connect. This method is not quite as convenient as direct a direct bank sync connection as it involves additional steps; however, the results are identical.

Click Here for Instructions for Manual UPLOAD A QFX FILE

CAM Tools - Pools

Instructions for Setting Up CAM Pools

1. Visit Settings, Setup CAM Pools.

2. Add one or more new CAM pools to the system by clicking 'Add New Pool'

3. Configure the CAM:

   Description: What you want to name the pool. Often this is property specific, so name it something descriptive like "Park Plaza Electricity Pool"

   Amount: This is the amount of the total pool. For instance, if the pool is to share electricity for all tenants in a building, you would specify the total electric bill here.

   Estimated: Check this box if the amount is estimated (this will often be the case). When checked, reports will indicate the estimated values so it is easy to identify them for reconciliation later.

   Frequency: Specify the frequency to charge this CAM. The charge will post on the rent due day during the month and frequency specified.

   Months: Define the specific months this charge will apply. For example, a monthly charge that happens every month, you would want to select all boxes January - December. For a quarterly charge, specify one month during the first quarter, one during the second quarter, one via the third, and one via the fourth. For a yearly charge, you only check one month that the charge will take place in. This option provides the flexibility to still charge a tenant rent each month, but a particular CAM charge might only be billed in January, and exclude all other months.

   Start Date & End Date: This is the dates for which this CAM applies. The CAM will not charge to any tenant before the start date or after the end date. Leaving either field blank means there is no specified start/end date and it will always run.

   Notes: These are for your internal use.

Go to the next page to discover how to configure CAM charges for your tenants.

CAM Tools - Tenant Charges

Instructions for Setting Up Tenant CAM Charges

1. Once you've setup one or more CAM pools, click the Tenants tab.
2. Right-click on a tenant, and select Cam Charges.
3. Configure CAM charges for the tenant by first selecting a CAM pool in the dropdown, then configure the remaining parameters:
4. Start & End: This works the same as the start and end dates for the CAM Pool, only these dates are tenant specific. Typically these dates will mimic the lease dates.
5. Percent: If the pool is percent based, put in the percentage that this tenant is responsible for here. The system will automatically charge the amount entered in step 3 above times the percentage each period to the tenant.
6. Fixed: If you want a fixed amount charged to the tenant in connection with this CAM, specify that here, otherwise leave the value as 0.00. Any value other than 0.00 in this field will override the percent field.
7. Once configured, click the green + icon to add the CAM charge to this tenant.
8. Repeat steps 6 and 7 to add multiple CAM charges to a tenant.

CAM charges will post to the tenant's ledger following the tenant's rent charges, on the rent due day. This means that if a tenant is scheduled to have a rent charge on the 1st of every month, on the 1st of every month the system will also charge any applicable CAM charges. (NOTE: CAM charges will not post to a tenant's ledger prior to the due date, where as rent charges do have that option.)

When you create CAM pools in steps 1-3, a new category will automatically be created for you. Then when a tenant is affiliated with a CAM charge, when posting a payment for that tenant, the affiliated CAM categories will be shown. When posting income related to a CAM charge, it is best to make sure the correct category is selected.

Note: If there is a CAM charge specified to run monthly and the tenant is charged rent quarterly, the CAM charges will only apply quarterly. This case is pretty uncommon, but if you have this specific scenario you will want to use a recurring charge instead. Recurring charges run independent of rent charges.

Collections

Reporting Delinquent Rent to Collections

Recognizing the need for accessing a trustworthy collections agency that benefits property managers and landlords by producing results, Rentec Direct partnered with Rent Recovery Service.

Rent Recovery Service, the leading collections agency for delinquent rent payments, offers Rentec Direct clients a highly trained and experienced staff of skip tracers, attorneys, private investigators and professional collection agents that team up to provide you an aggressive collection effort.

Collection agencies like Rent Recovery Service specialize in rent collection, and provide flat fee collections and contingency services.

Collection agencies can also report the debt to the major credit reporting bureaus which will leave a negative mark on the debtor's credit reports.

We are very impressed with how Rent Recovery Service's program is setup and how effective it is. To get setup or read more about them, CLICK HERE to visit their site.

1099-MISC Tax E-Filing

Submit 1099-MISC Tax Documents Online

Through Rentec Direct, you can file your **Federal and State 1099-MISC forms** for owners and vendors electronically or use the service to print and mail your forms.

Property managers must file 1099-MISC forms for any owner or vendor that was paid more than $600 during the year.

When you are ready to file go to the Settings Tab> Utilities> 1099 E-File and Print. (Note: only the primary user will be able to access these settings.)

In preparation we recommend the following:

- Edit your vendors and owners and verify you have the correct federal tax id number. For individuals this is their social security number (SSN) and for a business it would be their employer identification number (EIN). **Make sure to have a W-9 on file for each vendor and owner**
- Make sure to verify mailing address is accurate for each vendor and owner. The address is where their copy of the 1099 form will be mailed to which they will be using for the personal or corporate tax return.
- Verify your numbers. It is never too early to begin auditing your data. Review the 1099 Tax Assistant (Reports Tab> Financial Reports> 1099 Tax Assistant) and make sure the numbers match your records. This is the same data used for the 1099 E File. This report and the 1099 E file system will utilize the rents received and vendor payments entered throughout the year.
- Your properties will need to be "active" in order to be included in EOY (End Of Year) reporting. If your properties have been archived, you will need to re-activate them in order to include them in your 1099 filings.

If the information is not complete, you'll be required to update it before being allowed to submit your forms.

For more information on the 1099 Tax Assistant and filing your 1099-MISC form electronically through Rentec Direct CLICK HERE.

QuickBooks Export

Connect Your Rentec Account to QuickBooks

Now, with just a single click you can:

- Copy all financial transactions from Rentec Direct into Quickbooks®.
- Provide your accountant with a commonly recognizable formatted document to prepare your taxes or send 1099s.
- Copy all rental income and any other tenant payments into Quickbooks®.
- Copy all property income and expenses into Quickbooks®.
- Copy over all owner disbursements into Quickbooks®.
- Copy over all property management payments (when you pay yourself) into Quickbooks®.
- Access all financial based reports in Quickbooks® based upon your data within Rentec Direct.
- Optionally customize reports in Quickbooks® to display the data retrieved from Rentec in all possible reports formats.

To get started, CLICK HERE to learn how to export your data into Quickbooks compatible formats.

Transaction History Audit Log

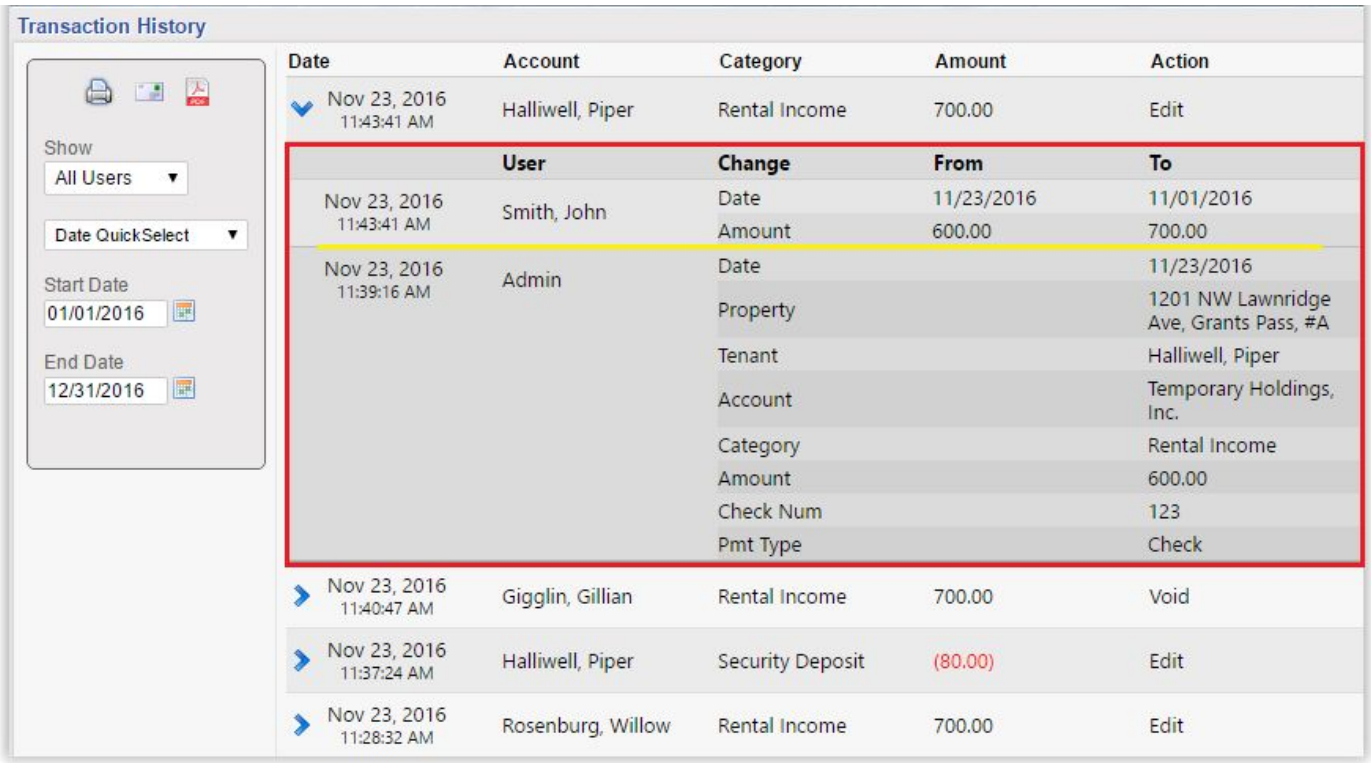
Access to the transaction history of your accounting logs is extremely helpful for:

- Audits
- Training new employees and identifying accidental edits
- Correcting errors
- Bank Account Reconciliation
- Identifying and preventing embezzlement

The Transaction History Audit Log will:

- List all the transactions that have been added or modified within an account
- Display information about the transaction on the main row, including:
    - Date of most recent modification
    - The account the transaction is associated with (tenant, property, owner, vendor or bank)
    - Category
    - Amount
    - Most recent action
- Detailed information of the changes that have been made are listed in an expandable row on click.
- Transactions are can be filtered to show only transactions that have been edited by a user and/or with a date range
- Split Transactions: A button has been included to view the history of modifications made to all transactions in a split transaction

Transaction History Audit Log



Here is how to access your transaction history:

From the Settings tab >>go to Utilities.

Click on the link for '**Transaction Edit History**' on the bottom of the list.

From here you will be able to view all the transaction history of your account. You can specify which user's transaction history you would like to view and/or select a date range.

You can view the history of an individual transaction. If a transaction has been previously edited, there will be a button to view the edit details.

Custom Website

Free Website Hosting & Domain Registration

Rentec provides you with a free professional website that is customizable to include information that is important and relevant to your business.

Your custom website includes the following features:

- Promote your brand with a custom theme and logo
- Fully customizable content for a Home Page, About Us Page & Contact Page.
- Vacancy listing page
- Collect rental applications online
- Capture tenant leads
- Tenant Portal access for your renters to pay rent online and submit work orders
- Owner Portal

Rentec includes this feature because we know how important an online presence is for every successful business.

We strongly encourage you take the time to read the manual for creating a professional website with Rentec Direct's website editor.

Access the guide here: How to Build a Professional Website with Rentec Direct

Register Your Domain with Rentec Direct

Any client who uses the software to create a website can also chose their own custom domain and Rentec with take of the registration process. A domain is the website address your clients will use to find you online (example www.pmprofessionals.com). The website guide listed above also explains the domain registration process.

Already own a registered domain?
If you already own a registered domain (through a service like GoDaddy), you can point it to our services and have that domain hosted for free by Rentec Direct.

Export Data

Download to Excel or CSV (Data Export)

Your ledgers (tenant, property, and bank account) are all downloadable in CSV format which opens directly into Excel!

Don't use excel? No worries because CSV is a universally recognized format that pretty much every application, including Quickbooks, Quicken, Google Docs, and others widely use and accept.

Download Ledgers

Any time, to use this new feature just open up any ledger. At the bottom of the ledger is a link that says download this data. If you have Excel installed it can be opened directly into Excel, or saved to your computer where you choose.

Download Reports

All Reports can also be downloaded via CSV. When viewing a report, simply click the green download to CSV icon on the top-right corner of the report.

Tenant Data

Active Tenant data can also be downloaded to CSV by going to Settings, select Utilities, then click Download Tenant Data.

Advanced Exports

Advanced data export outside the scope of what the Rentec software currently provides is available on a per-hour basis billed at $100 per hour for data export services.

User Permissions

Manage User Login Accounts

To setup and manage user accounts, head to the *Settings* tab, select *Manage User Accounts* and then click on the *Add a User* button on the top left.

- Fill in the form with the user's information and for choosing User Account Type, be sure to hover over the ? Once configured, click *Add New User.*
- After they've been added, you can then set restrict their permissions in more detail by clicking on "*Limited*".
- Here you can configure what areas of the software they have access to and what areas you want them to be able to edit, or you can simply set them as a read only account so that they are unable to make any changes. The image below displays some of the permissions you can control.

Note: Only the primary user can have complete permissions. Each additional user can be setup to have access to all areas of the software, except .deleting the primary user.

Storing Files & Documents

A Tenant's or Property's File Library allows you to upload and store all types of files such as:

- Documents
- Applications
- Notices
- Pictures
- Voice Messages (MP3/WAV)

Just right-click on any property/tenant name and choose File Library from the drop down menu.

You can also share files you have uploaded to your file library with your tenant and owners. Just click (share) next to the file in the File Library.

Master File Library

In the Settings Tab > File Library you will find the Master File Library. In the Master File Library you will find all of your files that you have stored in the program.

This feature comes in handy when you are trying to look for an attachment you have uploaded when posting an income/expense, and just can't remember when/where.

Mobile App Shortcut

Set Up a Mobile App Shortcut

If you want to instantly access your Rentec Direct account from your mobile phone, you can easily set up a home screen shortcut.

A home screen shortcut will appear on your phone alongside your other mobile apps and, when clicked on, it will open your Rentec Direct account.

Instructions for iPhone

1. Open a web browser on your iPhone and log into your Rentec Direct account – select the *Remember Me* box if you want to save time down the road (and don't forget to have 2-factor authentication enabled)
2. Once logged into your account, choose the download button on the bottom bar of your screen (it looks like a rectangle with an arrow pointing up).
3. Next choose "Add to Home screen" (it looks like a square containing a plus sign)
4. Click the Add button in the upper right side of the screen.
5. Go back to your phone's home screen and find the Rentec app icon. It should look like a mini version of the summary screen in the icon.

For step-by-step instructions with pictures, click this link: Rentec Mobile Shortcut for iPhone

Instructions for Android:

1. Open a web browser on your Android mobile phone and log into your Rentec Direct account – select the *Remember Me*box if you want to save time down the road (and don't forget to have 2-factor authentication enabled)
2. Once logged into your account, click the more options icon in the upper right corner of the screen. It looks like 3 little vertical dots.
3. Choose the "Add to Home screen" from the drop-down menu that appears
4. Click the ADD button
5. Go back to your phone's home screen and find the Rentec app icon. It should look like a blue square containing a capitalized R.

For step-by-step instructions with pictures, click this link: Rentec Mobile Shortcut for Android

Custom Logos on Reports

Add your company logo to Property Management Reports

You can add your company logo to reports generated within Rentec Direct's software. Including your logo on reports, like statements, ledgers, or a rent roll report, is a great way to maintain your brand and stand out to clients.

How to Add Your Logo to Reports

Step 1 – Upload your logo into the system

- Log into your Rentec Direct account
- Click the Settings Tab
- Select Professional Website and Branding
- Upload your logo. Make sure to use the recommended dimensions of 186px X 62px.* (Try using an online image resizer to adjust your logo if necessary).

Step 2 – Add your Logo to Reports

- Select the Settings Tab
- Click on Program Defaults
- Find the "Report header options" and select your display from the drop down menu.

Step 3 – Select your preferred report header style

Within the Report header options you can choose where to display:

1) Your contact info only
2) Your Logo and Contact Info, side by side
or
3) Only your Logo

Depending on which option you choose, your logo could be scaled, so make sure the dimensions are 185px x 63px.

Learn more about Custom Logos on Reports

Beyond the Basics

Need Help?

Contact Your Client Success Team

You always have access to free support from your team at Rentec Direct.

To connect with your Client Success Team

Email support@rentecdirect.com or

Call **800-881-5139**

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