RENTEC DIRECT PRO
New Client Welcome Kit

WELCOME TO RENTEC DIRECT

This New Client Welcome Kit has everything you need to get started:

- A simple Getting Started checklist.
- Quick Tips for navigating & finding help.
- Next Steps & resources to maximize your account benefits.

Log In to Your Account

Check your email for your **username** and **password**.

- Log in at: rentecdirect.com/login

Setting Up Your New Rentec Direct Account

Watch this video for detailed Setup Instructions.

(Right-click to open video in a new tab.)

WELCOME TO RENTEC DIRECT

Complete these steps to get started with your PRO account

1

Settings

Click on **Settings** and then **Accounting Defaults**. Pay special attention to:

- Default grace period
- Default late fee

It is important to configure Accounting Defaults first as they impact Property and Tenant accounting.

2

Banking

Click on **Accounts** and then **Add an Account** for each account you use to manage your rentals.

This step is crucial for bookkeeping, reporting, and bank reconciliation. This step will NOT connect live to your bank.

Important Note:

Before the next step, make sure you have the right software version for your needs? PRO and PM have different steps from this point on.

STOP

If your properties are separate LLCs, you need to add managers and/or owners, or have CAM charges, upgrade to PM before moving forward.

Feeling lost?

You are not alone, we have tons of great resources to help you get started from training videos to articles to friendly live support.

HELP

You can find training videos and directions in the **Getting Started** section of the Knowledge Base here: help.rentecdirect.com

3

Properties

Click on **Properties** and then **Add a Property** to begin adding the details of your property.

Be sure to specify the appropriate income and expense accounts for each property.

4

Tenants

Click on **Properties** and then the **Place New Tenant** link on the property they reside to create a new tenant record.

You may also add Tenants without moving them in by clicking on **Tenants** and the **Add New Tenant** option.

NEED HELP? success@rentecdirect.com | 800-881-5139

NAVIGATION TIPS

It's easy to find the information you need in your software

Click on the **blue "?"** for useful advice.

The **pencil/paper icon** gives you quick editing options.

Right-click on a property, tenant, or account to access more options.

Click on the balance in each tab to view a **Ledger of transactions**

Filters on each page isolate information quickly.

The **Summary** tab displays important notices about your rental portfolio activity.

CLIENT RESOURCES FOR SUCCESS

However you learn best, we have you covered!

Training Videos

Go deep with detailed training about your account tools.

Knowledge Base

24/7 access to instructions for all features & tasks.

Free Webinars

Ongoing live training webinars to refine your Rentec Direct skills.

Onboarding & Support

Find helpful support for getting started and beyond by phone, email, or live chat.

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NEXT STEPS

Ready to take your account to the next level?
Learn about the robust features built into your software.

Online Payments

Collect payments online from tenants and rental applicants.

Tenant Screening

Order credit and background screening reports.

Marketing & Applications

Market your vacant properties and collect rental applications online.

Tools for Managing Tenants

Tips, videos, flyers, and resources to help manage your tenants.

WE'RE EXCITED TO HAVE YOU JOIN THE RENTEC DIRECT TEAM!

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