RENTEC DIRECT PM
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 PM 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 **Banking** 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.

3

Owners

Click on **Owners** and then **Add an Owner** before adding any Properties into your software.

Adding owners before properties will save time and eliminate potential errors.

4

Managers

Click on **Settings** and then **Managers & Users** to add property, marketing, and/or maintenance managers.

Managers can be assigned with or without account access. Additional subusers can be added later.

5

Properties

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

Be sure to link default income and expense accounts, property managers, property owners, and management fees.

6

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.

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NAVIGATION TIPS

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

Click on the question mark **"?"** for useful advice.

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

Right-click or click the dots 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? Get started with ledger transactions first and then check out these key features built into your software.

Online Payments

Collect payments online from tenant 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.

Welcome Property Owners

Introduce the Owner Portal and management tools to your clients.

Management Marketing Kit

Exclusive tools for property managers to attract and new clients.

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

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