



RentTrack Onboarding Process

Property Management Solutions for Over 30 Years

Overview

This document is designed to help inform you of the process taken when first implementing RentTrack with Promas. The onboarding process is listed out as well as what is needed on a Windows 7 computer and how to correctly enter unit addresses to comply with being reported to the Credit Bureau.

Related Guides

Our [RentTrack Integration Guide](#) will detail more information after the initial onboarding process. Also visit the [RentTrack website](#) to view more information.

Quick Links to Individual Topics

[Onboarding Process](#)

[Unit Address](#)

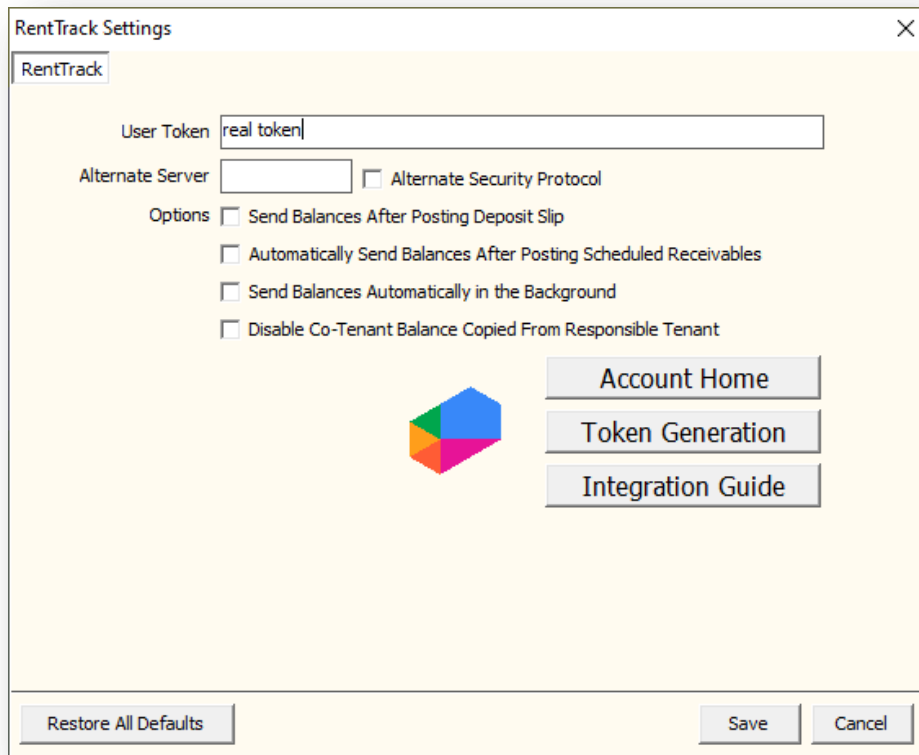
[Windows 7](#)

2. Verification Phase

- a. Data and unit addresses will be reviewed and checked for accuracy. This is an important step since RentTrack will be reporting to the Credit Bureau.
- b. If any issues are found, Promas and RentTrack will work together with you to help resolve them.

3. First Official Balances Sent

- a. You will be emailed a token from RentTrack that can be stored under Dashboard >RentTrack > Settings and import removed from Alternate Server
- b. In Settings is also where you'll be shown how to automatically send balances after posting scheduled receivables (rent, recurring charges, and late fees) as well as sending balances automatically in the background.
 - i. **Please do not mark “Disable Co-Tenant Balance Copied from Responsible Tenant” unless advised to do so. Marking this can cause co-tenants to not show correct balance due.**



Unit Address Correct Format

The unit address is found under Profiles > Unit > Edit Unit > Address (A). The Unit ID and Unit Name are not considered (B).

B

ID CEDAR327 327 Cedar Lane Key [] Status Active

Upload Manager Inspections

Unit Description

Ledger GOLDEN: Harrison S. Golden [Owner] []

Unit Type SFR: Single Family [] Change Ledger

Mgmt Fee 10% A: Percent of Actual []

Manager []

Building []

Rent \$690.00 Per Sq Ft

Repair Limit []

A

Address

327 Cedar Lane

Vienna, VA 22181

22181 ZIP... Foreign

Rental Information

Market Rent \$690.00

Square Footage []

Sq Ft Percentage []

CAM Percentage []

Fee Summary

On Collected \$69.00

Not On Collected []

When Vacant []

Owner % Late Fee []

The # symbol can be used to indicate a unit number or any special phrasing not part of the official address. Only one # symbol can be used.

For example, if Cedar Lane had units 101, 102 and 103, the unit could be displayed as below. Or if the garage was being rented out and there was garage 1 and garage 2, it could be shown as below.

Address

327 Cedar Lane #101

Vienna, VA 22181

22181 ZIP... Foreign

Address

327 Cedar Lane #Garage 2

Vienna, VA 22181

22181 ZIP... Foreign

Also, two units cannot share the same name. For example, 315 Main Street and 315 Main Street #Garage would be read in RentTrack as being the same. To correct, make the main house 315 Main Street #main house (or something similar). This allows RentTrack to properly report to the credit bureaus and makes the units search on maps.

Windows 7

In order to send balances from a Windows 7 computer, you'll need to mark "Alternate Security Protocol" under Dashboard > RentTrack > Settings.

RentTrack Settings


RentTrack

User Token

Alternate Server Alternate Security Protocol

Options

- Send Balances After Posting Deposit Slip
- Automatically Send Balances After Posting Scheduled Receivables
- Send Balances Automatically in the Background
- Disable Co-Tenant Balance Copied From Responsible Tenant



Account Home

Token Generation

Integration Guide

Restore All Defaults

Save

Cancel

This change will affect all computers. We do not recommend having a network with different operating systems. If one or more of the computers is Windows 10, we recommend updating the Windows 7 computer to Windows 10 as well.