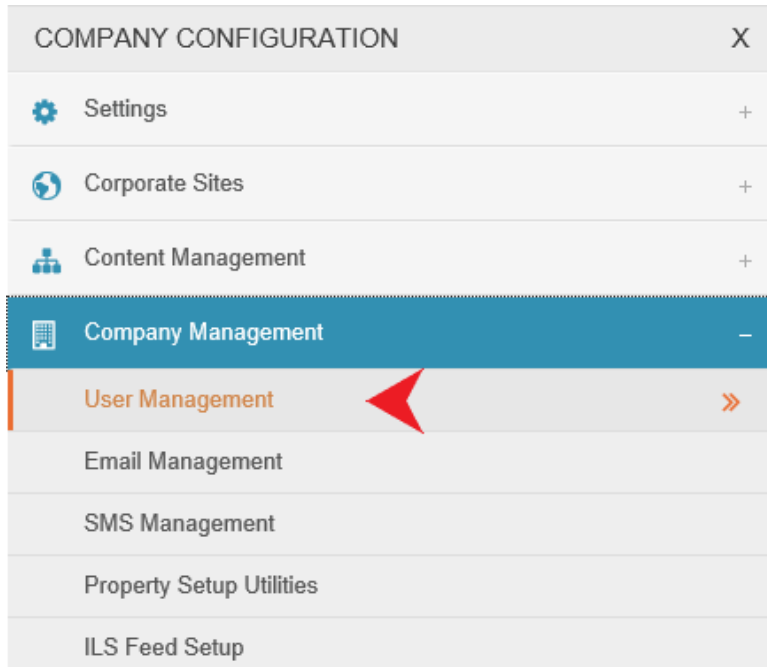
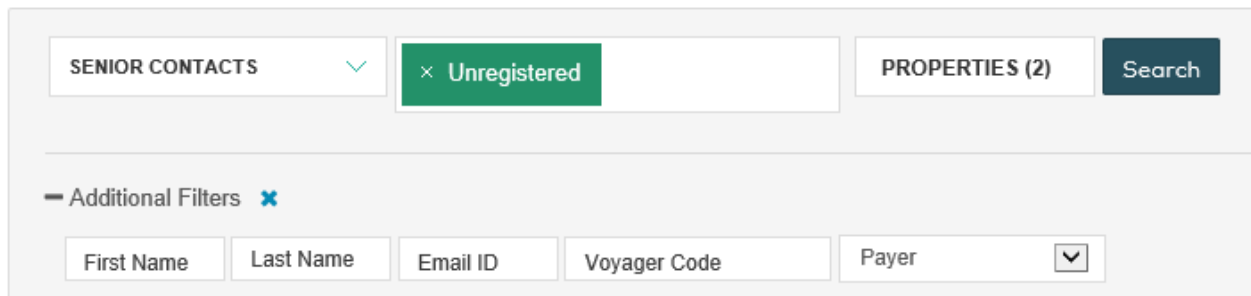


HOW-TO: Manager user accounts in Rentcafe Portal Manager

Step 1: To log in, go to www.rentcafe.com and select the Manager Login in the top right. Use your email address and password to log in. The first process will be reviewing if your user is registered, unregistered, or invited. To do so, from the left menu select 'Company Management'. When that list opens, select 'User Management', as seen below.



Step 2: From the next screen, you can review your available users by multiple categories. Below is a screenshot of those option and what to enter when necessary.



Upper Section:

- The first option on the example above states “**Senior Contacts**”. If you open that dropdown, you will see other options, including ‘Residents’ and ‘Prospects’. No matter what, as a senior community, we will always select the “**Senior Contacts**” option you see above.
- The second option is the box that currently reads “Unregistered”. This will search for any users not currently on the portal, but you can also search for two other options. The “Registered” option will search for all currently registered users while the “Invited” option will show who you

have invited through the portal. You can click anywhere in the box to change the option, and also search multiple options at once.

- The third option is “Properties”. Simply clicking the area will bring up all the properties that you have access to review. Simply check the boxes next to the ones that you wish to search in order to review the residents within them.

Lower Section:

- First Name – Search by the resident or contact first name (as it appears in our Voyager records)
- Last Name – Search by the resident or contact last name (as it appears in our Voyager records)
- Email ID – Search by the resident or contact email address (as it appears in our Voyager records)
- Voyager Code – Search by the resident or contact Voyager ID (used as registration code)
- Payer – Search by the payer status as it appears in Yardi

Step 3: Sending invitations to the portal can be an effective way to reach out to residents who have not registered for the portal yet. To do so, follow the instructions below:

- 1) Search for unregistered users at your property (red arrow)
- 2) Make the dropdown “Primary Payer” in the additional filters (red star)
- 3) Run the search (red arrow again)
- 4) When the searched residents appear, enter an ‘@’ symbol in the search field (red X)
- 5) Select all residents that you plan on inviting to the portal (red check)
- 6) Press “Send Invite to All Unregistered Residents” to send the invitations.

NOTE: If you use the ‘records per page’ dropdown above the red check, you can increase the result tally.

The screenshot shows the Voyager portal interface. At the top, there is a search bar with 'SENIOR CONTACTS' selected, a filter for 'Unregistered', and 'PROPERTIES (2)'. A red arrow points to the 'Search' button. Below this is the 'Additional Filters' section, where 'Primary Payer' is selected, indicated by a red star. A table below shows a list of residents with columns for 'Full Name', 'Details', 'Registration Status', 'Account Status', and 'Actions'. The first row, for Anthony Dingman, has a red checkmark in the 'Full Name' column. Above the table, there is a 'Send Invite To All Unregistered Residents' button and an 'Export' button. A search field with '@' and a red X is also visible.

Full Name	Details	Registration Status	Account Status	Actions
<input checked="" type="checkbox"/> 4 Anthony Dingman anthonydingman@gmail.com	Resident: 4 Anthony Dingman (00026046) Current Contact Relationship: Self Payer: Primary Waltonwood Cary (919) 782-6756	Unregistered	● Not Invited	
<input type="checkbox"/> 4 Barbara Malone charlygyr1969@gmail.com	Resident: 4 Barbara Malone (00034648) Current Contact Relationship: Self Payer: Primary Waltonwood Cary	Unregistered	● Not Invited	
<input type="checkbox"/> 4 Britt Griffin susan.montgomery9@gmail.com	Resident: 4 Britt Griffin (00020705) Current Contact Relationship: Self Payer: Primary Waltonwood Cary (252) 523-3539	Unregistered	● Not Invited	

If you'd like, you can also do a search by last name and invite one user at a time, which can be a valuable tool if they are struggling with the self-registration process. Do the same unregistered user search as the previous method, as seen at the top red arrow, but instead, where you see the left red arrow, search for the resident or contact by their individual last name. From there, you will see an envelope icon to the right of their name, denoted by the right red arrow. When you click that, you will see a notification pop up at the top of the screen saying that an invitation was successfully sent. NOTE: This icon will only appear if the resident has a valid email address, which appears below their name in the “Full Name” column.

SENIOR CONTACTS Unregistered PROPERTIES (2) Search

Additional Filters

First Name: Baunoch Email ID: Voyager Code: Payer: [v]

10 records per page

Send Invite To All Unregistered Residents Export

Full Name	Details	Registration Status	Account Status	Actions
4 Kenneth Baunoch kenbau28@yahoo.com	Resident: 4 Kenneth Baunoch (00032510) Current Contact Relationship: Self Payer: Primary Waltonwood Cherry Hill I (248) 887-9009	Unregistered	Not Invited	[Send Invite] [Edit]

Showing 1 to 1 of 1 entries

← Previous 1 Next →

Step 4: Lastly, in case of a password error or change in email, we will also need to assist registered users with troubleshooting. To do so, you can review as you see below by searching instead for registered users and the necessary last name. From here, the icon now appears as an edit option. We can click that to drill down into the resident’s personal portal information.

SENIOR CONTACTS Registered PROPERTIES (2) Search

Additional Filters

First Name: olson Email ID: Voyager Code: Payer: [v]

10 records per page

Search: Export

Full Name	Details	Registration Status	Account Status	Actions
4 Barbara Olson barbaraolson34@gmail.com	Resident: 4 Barbara Olson (0034892) Current Contact Relationship: Self Payer: Primary Waltonwood Cherry Hill I	Registered on 7/27/2018 Last login: 7/27/2018	Active ✓ Verified	[Edit] [Send Invite]
4 Robert Olson robertolson1931@gmail.com	Resident: 4 Robert Olson (00032193) Current Contact Relationship: Self Payer: Primary Waltonwood Cherry Hill I (989) 370-3732	Registered on 7/27/2018 Last login: 7/27/2018	Active ✓ Verified	[Edit]

The next screen opens up their personalized portal information. Below is a play-by-play of the options you’ll have available from this screen.

Review User

[Reset Password](#)[Resend Verification Email](#)

Name 4 Barbara Olson

User Name

Change Password Weak Medium Strong

Confirm Password

Date Registered

Email Verified

User Account Status:

[Save Changes](#)

Resident Profiles

Property Name	Resident Code	Lock This Resident	
Waltonwood Cherry Hill I	10034892	<input type="checkbox"/>	Preview Delete

Center Screen:

- Name – Denotes the resident name (can only be changed in Yardi directly)
- User Name – Denotes the current email address on file (can be changed here)
- Change Password – Denotes where a direct new password can be changed manually
- Confirm Password – Denotes where to confirm the above changed password
- Date Registered – Denotes the date the resident joined the portal
- Email Verified – Denotes if the resident has verified the registration from their own email account, but can be checked by you manually to save them the step
- User Account Status – Will be set to enabled if we want them to have access, but can be disabled from too many NSF fees or from misuse
- Save Changes – Click here to save any changes done to this section

Bottom Screen:

- Property Name – Denotes the property they currently reside at
- Resident Code – Denotes their Yardi code (used for registration)
- Lock This Resident – Can also be used to suspend use of their account
- Preview – Can be used to see what the resident will see when they log in to their account, but note that no changes to banking information or personal information can be done through the preview environment, as it is only a sample and not the actual site
- Delete – Deletes the users account entirely, but note also that this will not remove their autopayment setup, as this is in the hands of the resident to do manually

Top Right Screen:

- Reset Password – Denotes a way to send an email to the resident with a forced password reset for those that have forgotten their password and do not want to provide it directly
- Resend Verification Email – Denotes a way to send an email to the resident to verify their registration process, in case they either did not receive it or deleted it

These instructions should assist you with any user management issues. Please contact your Yardi support specialist with any continued issues.