RentalVault

User Manual

Last Updated January 2022

RentalVault

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Units

RentalVault will enable you to store a variety of information about each of the units &properties in your portfolio. Every aspect about RentalVault revolves around your unit list, so it's helpful to add all of your unit data in before you get started in other areas of the system.

Adding a New Unit

To add a new unit record, hover over the Units toolbar item and choose the "Add New Unit" menu item.
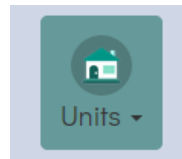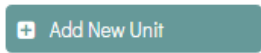
+ Add New Unit

The "Add New Unit" screen appears:

Add New Unit

🏷 **Name & Location**

Nickname or Unit #

Address

Required

Alternatively, you can also **click** (rather than hover over) the Units toolbar and this takes you to the Units screen, where you can click the "Add New Unit" on that screen:

🏠 **Units**   🗑   🔍 Lease Selected Units   Add New Unit

In the "Add New Unit" screen, enter a nickname/unit number and/or an address for the unit. Unit records can represent single family homes, individual units of a duplex/triplex, an apartment/condo/suite, etc.

Tip: if you own or manage individual units/apartments that belong to a common building/property, you can add Property Groups to group these into properties and keep them organized. For example, you'd add three units called 102 Maple, 204 Maple, and 309 Maple, and a property group called Maple Building, and each unit would be linked to that property/building via the property group. If this doesn't represent your situation (i.e. you mostly deal with single family homes or detached dwellings with a single lease), you don't need to worry about property groups.

For a new Unit record, a nickname or an address is required to save the record.

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You can of course add as much information as you'd like – you can choose to Quick Save (save right away with the information you have added initially) or Save & Enter More Details, which saves the unit record and takes you to the "Edit Unit" page for it, where you can add even more details about the unit, including leases, files/uploads, notes/comments, and photos.

See the "Edit Unit" section below for more information about this page.

Units Page
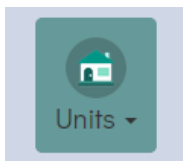
The Units page shows you a complete listing of your portfolio, either for the current owner, or for all owners, if selected. Click the Units toolbar item and the Units page appears.

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The Units page shows your units across three tabs that represent status – Leased, Vacant, or Archived. Leased units have one or more active or expired lease attached to it, while vacant units currently have no lease (but might have one or more former/closed leases). Archived units are ones that have been manually archived by you – units you may have recently sold, for example.

When you add a new Unit, it appears on the Vacant tab first, as it does not have any leases attached to it.

You can filter the Units page by any relevant piece of information displayed on this screen. For example, by typing into the "Search Any Field" box, you can filter units by address, nickname/unit #, type, unit group, or lease information (tenant name, start/end dates, etc) – in this way you can quickly find units in a large list:

You can also use the City and Property Groups drop down filters to filter Units for a particular city and/or group:

Clicking a single row on the Units page:

will open a Details panel on the right side of the screen:

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This panel shows detailed information about the specific unit, including information about any leases on the units, total balance outstanding, amount due this month, amount paid/collected, and the same for last month.

This panel also shows supplementary information that has been attached to the unit, including links to any files, thumbnails of photos, and notes/comments you have added.

Finally, the Details panel contains handy shortcut buttons to the Rent Roll and Payment History screens, specific to each lease on the unit. Also displayed is a Settings button to jump to the Edit Lease Settings page, and a way to send each tenant on the lease an email message.
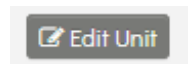
To modify or view more information about the Unit, click the button

The Edit Unit page appears.

Edit Unit

The Edit Unit page allows you to see all of the information pertinent to a particular unit, as well make changes to this information. The information pertaining to a unit is organized across a number of tabs:

General tab

The General tab contains basic fields about the unit's name, address, location, type, group, owner, etc. as well as some rudimentary data about its number of bedrooms & bathrooms and size. Other fields include typical market rent, deposit, availability notes, and application fee – these are descriptive/information in nature and are not used as lease defaults or in any rent roll calculations.

Leases tab

There are a number of different ways to add a lease to unit in RentalVault, but no matter what method you choose, Lease records will always show for any given unit on this tab. The leases tab shows current (open, expired or not expired) leases on top, and closed/former leases on the bottom:

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On this tab you can add a New Lease or open Lease Settings for a particular lease (see the Lease Settings section for more information about editing leases).

Unit Files tab

Here you can upload files specific to this unit. Typical files might include floor plan PDFs, promotional brochures about this unit, mortgage information, invoices for repairs & maintenance, and the like. Click the Upload File button to show the Select File panel:

Click the Browse... button and choose a file on your computer or device. Give the file a description (required) and then click the Upload button to start the upload process. Large files may take some time to upload to RentalVault.

Files are displayed here and can be downloaded, edited or deleted:
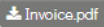
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File Uploads

File	Description	Added By	Date	**+ Upload File**
⬇ Invoice.pdf	Invoice for cleaning services.	Bert Hopper	Jan-05-2024 3:42 PM	🖊 🗑

Notes & Comments tab

On this tab you can add just about any free text comment or note that you'd like. This is a handy area to add reminders, commentary, or messags to other users on your account about the unit.

Click the Add Comment button and enter your message/note into the Comment text box. Click Save when you are finished. Your entry appears in the list where it can be subsequently edited or deleted.

Comments

Comment	Added By	Date	**+ Add Comment**
Just a heads up that this property is scheduled for a complete re-paint next Monday. Please let Tom know so he can make sure his crew is ready to go first thing in the morning.	Bert Hopper	Oct-19-2023 3:47 PM	🖊 🗑

Photos tab

You can upload unit photos on this tab – each will be shown in the list in thumbnail form:

Photos

Date Added	Thumbnail	Comment	**+ Upload Photo**
Apr-19-2023 by Bert Hopper		Front view	
			🖊 🗑

Clicking the thumbnail will show the image in a larger format.

Importing Units (or Tenants)

You can create units faster in bulk by importing unit data from a spreadsheet, if you have such data from another system or a file you have created yourself. RentalVault will let you import data by copying & pasting from any spreadsheet (Excel or other) - actually from any tab-delimited data source.

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To get started, hover over the Units (or Tenants if you're importing tenants) toolbar icon and click **Import From Spreadsheet**:
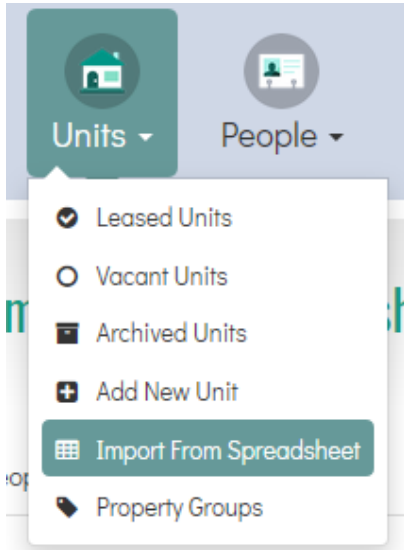
The Import from Spreadsheet screen appears:

First make sure the data in your spreadsheet matches the columns required for import (in this case for Units, it's Nickname or Unit #, Address, City, State, Zip) and also make sure the column data is in the correct order.

Then select the data to import by highlighting and copying in Excel:

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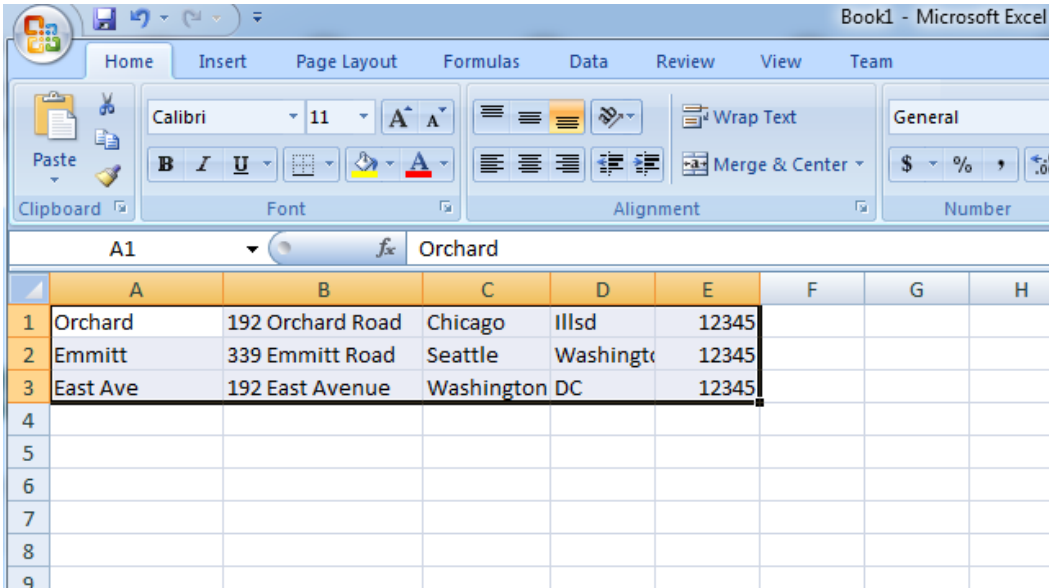
Step 1: Paste your data into the textbox:

Click the **"Format Data"** button to format and correct the data. If your data is correctly ordered and tab-delimited in Excel (or Libre Office, or Notepad, etc.), your data will be organized into columns on screen:

Nickname or Unit #	Address	City
Orchard	192 Orchard Road	Chicago
Emmitt	339 Emmitt Road	Seattle
East Ave	192 East Avenue	Washington

Step 2:

Next, select the owner you want the data to be imported into (if applicable) and then click the **Import Units** button:

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A new unit (or tenant, if you're importing tenants) will be created for each row you have pasted in from your spreadsheet. If record creation fails for any particular record, you will see the erroneous record counts. If you're trying to import more units than your current RentalVault plan allows for (i.e. your current unit count + the number you're importing), a warning message will appear and you'll have to trim the number of records to fit into your plan.

Note: new units will be imported into the Vacant Units tab (since they aren't assigned to any tenants yet), and newly imported tenants will be created under the Prospective Tenants & Applicants tab (since these are new people entries and aren't active tenants yet).

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People

The People modules in RentalVault manage a wide variety of information about Tenants (including active and former tenants), and Applicants.

Adding a New Person

To add a new person record, hover over the People toolbar item
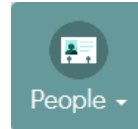
and choose the "Add New Person" menu.

The "Add New Person" screen appears:

Alternatively, you can also **click** (rather than hover over) the People toolbar and this takes you to the People screen, where you can click the "Add New Person" on that screen:

In the "Add New Person" screen, enter at least a First and Last name for the person, and click 'Quick Save', which saves the person immediately, or click 'Save & Enter More Details' which saves the person and takes you to the 'Edit Person' page where you can enter much more information, including leases, files, notes & comments residence & employer history, and more:

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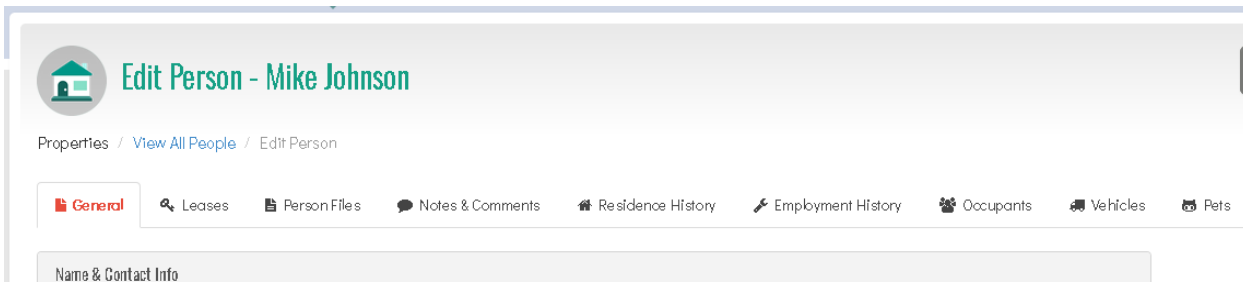
See the "Edit Person" section below for more information about this page.

People Page

The People page shows you a comprehensive listing of every person (including tenants, former tenants, and prospective tenants, or applicants) on your account, either for the current owner, or for all owners, if selected. Click the People toolbar item and the People page appears:
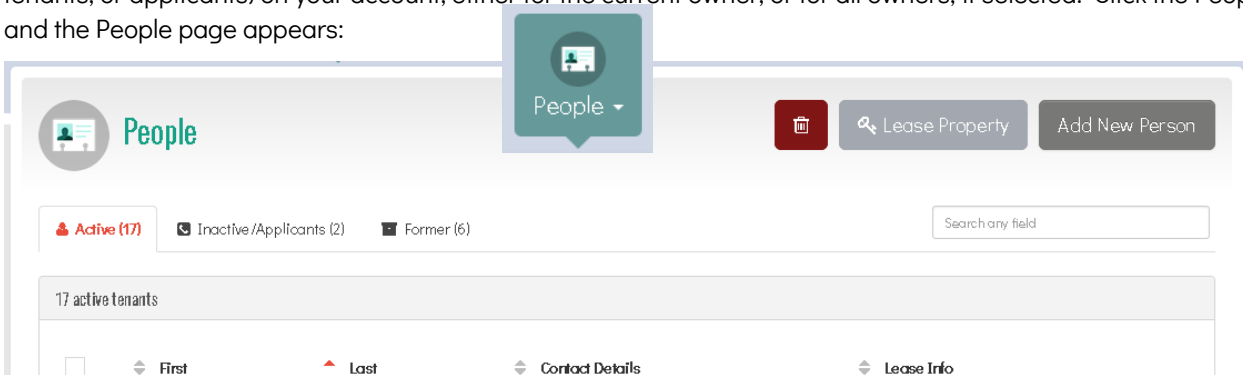
The People page is organized by a person's leasing status – people can be Active (being party to a one or more leases), Inactive/Applicant (tenants who are not linked to a unit by a lease), or Former (tenants who are part of a lease that is now closed). Note that tenants on expired leases appear still appear the Active tab.

When you add a new Person, he/she will appear on the Inactive/Applicant tab first, as the person record does not have any leases attached to it yet.

You can filter the People page by any relevant piece of information displayed on this screen. For example, by typing into the "Search Any Field" box, you can filter people by first/last name, contact details, or lease dates – in this way you can quickly find a person in a large list:

The People list can be sorted by clicking any of the column headers.

Clicking a single row on the People page:

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will open a Details panel on the right side of the screen:

This panel shows detailed information about the specific person, including information about any leases the person is linked to, total balance outstanding, amount due this month, amount paid/collected, and the same for last month.

This panel also shows supplementary information that has been attached to the person, including links to any files, notes, residence history, employer history, occupants (other people living with the tenant but not necessarily written into the lease), vehicle record, and pet details.

Finally, the Details panel contains handy shortcut buttons to the Collect Payment, Rent Roll and Payment History screens, specific to each lease the tenant is a part of. Also displayed is a Settings button to jump to the Edit Lease Settings page, and a way to send each tenant on the lease an email message.

To modify or view more information about the Person, click the Edit Person button:

The Edit Person page appears.

Edit Person

The Edit Person page allows you to see all of the information pertinent to a particular person or tenant, as well make changes to this information. The information pertaining to a person is organized across a number of tabs:

General tab

The General tab contains basic fields to store the person's name, phone and email contact information, as well as some optional fields to store identification details – date of birth, drivers license, SSN (or SIN in Canada), etc. You can use these fields as you see fit; be sure to follow your jurisdiction's laws regarding the collection of personally identfiying information.

Leases tab

There are a number of different ways to link a person to a lease in RentalVault, but no matter what method you choose, Lease records will always show for any given person on this tab. The leases tab shows current (open, expired or not expired) leases on top, and closed/former leases on the bottom:

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On this tab you can add a New Lease or open Lease Settings for a particular lease (see the Lease Settings section for more information about editing leases).

Person Files tab

Here you can upload files specific to this person. This is a good place to store tenant-specific information like scans of drivers licenses, signed copies of the application and lease agreement paperwork, etc.

Click the Upload File button to show the Select File panel:
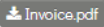

Click the Browse... button and choose a file on your computer or device. Give the file a description (required) and then click the Upload button to start the upload process. Large files may take some time to upload to RentalVault.

Files are displayed here and can be downloaded, edited or deleted:

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File Uploads

File	Description	Added By	Date	
📥 Invoice.pdf	Invoice for cleaning services.	Bert Hopper	Jan-05-2024 3:42 PM	✏️ 🗑️

Notes & Comments tab

On this tab you can add just about any free text comment or note that you'd like. This is a handy area to add reminders, commentary, or messags to other users on your account about the person.

Click the Add Comment button and enter your message/note into the Comment text box. Click Save when you are finished. Your entry appears in the list where it can be subsequently edited or deleted.

Comments

Comment	Added By	Date	
Just a heads up that this property is scheduled for a complete re-paint next Monday. Please let Tom know so he can make sure his crew is ready to go first thing in the morning.	Bert Hopper	Oct-19-2023 3:47 PM	✏️ 🗑️

Residence History tab

Keep track of an applicant's residence history including contact information for references here. You can create an entry for a particular date range, address, and contact reference.

Employment History tab

Add a person's employment details here – you can create as many entries as you need and store From-To dates, employer name, and a reference/contact for the job & time period.

Occupants tab

Often, people will have spouses, partners, family members, or roommates that may or may not be on the lease as a signing tenant. You should add every person that signs the lease in the system as a tenant (with an entry on the lease record), but for eveyone else you can just document them here as 'occupants'. Add their name, relationship to this person/tenant, phone/contact info, and any comments you have.

Vehicles tab

Keep track of each vehicle your tenant owns/operates – fields include make, model, year, and plate number.

Pets tab

Store information about any pets this person might own or be responsible for. Fields include type of animal, name, breed, tag or license #, and a brief description.

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Leases

Lease records are essential to RentalVault, they are at the core of every fee, receivable, payment in the system, *and you can't really do much without having at least one lease added to your account*.

Although most of the time you'll only have one active lease on a unit at a given time, RentalVault will accommodate you if you need to add multiple, active leases on the same unit at the same time. RentalVault is flexible enough to handle any situation, including the (more likely) scenario of one active lease with multiple former/inactive leases that have expired or closed.

RentalVault will support single or multiple tenants per lease – you can add any number of persons to the lease, and each one can pay a portion or the full amount of any fee/charge on the lease.

Fixed date (start date → end date) leases are supported, as well as open-ended / month-to-month leases. Any number of charges/fees can be added to the lease, including (of course) rent, other recurring or one-time fees, utility bills, etc. Every charge/fee can be configured to recur one time, or monthly, weekly, bi-monthly, every two weeks, daily, quarterly, or yearly. Each charge can be billed independently (on different recurrence patterns if required) and appear as a separate line items on an invoice. Charges can exist within lease start and end dates, or even outside of that on their own date boundaries.

Adding a New Lease

There are a number of ways to create a new lease entry in RentalVault, depending on if you are coming from the perspective of the person (and you want to move that person into a particular unit), or from the perspective of the unit (and you want to lease that unit to one or more people).

From Units (adding tenants to a unit)

On the Units page, check the box next to a particular unit you want to lease:

Then click the "Lease Selected Units" button:

TIP: you can lease more than one unit a time; this greatly decreases the time it takes to lease all of your units when you are first getting set up in the system. Just check more than one box before you click the "Lease Selected Units" button:

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The "Add People to Selected Units" popup screen appears:

Add Tenants

As you can see, you can assign multiple tenants to this unit on this screen.

If you selected more than one unit, each unit will appear on a separate line, each with its own tenants dropdown list to assign separate (or the same!) tenants to each unit:
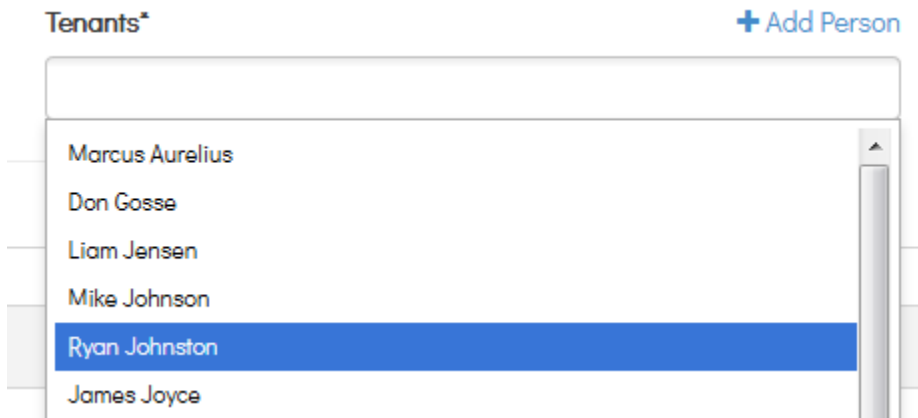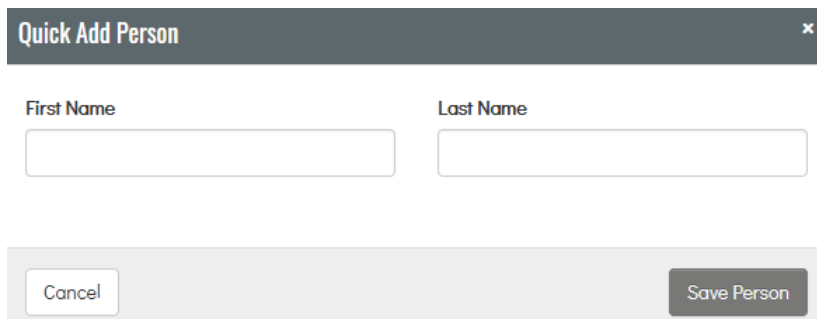
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Click in the Tenants dropdown list to select from the list of people and assign him/her to the lease:

You can create a new person record on the fly by clicking the "Add Person" link:
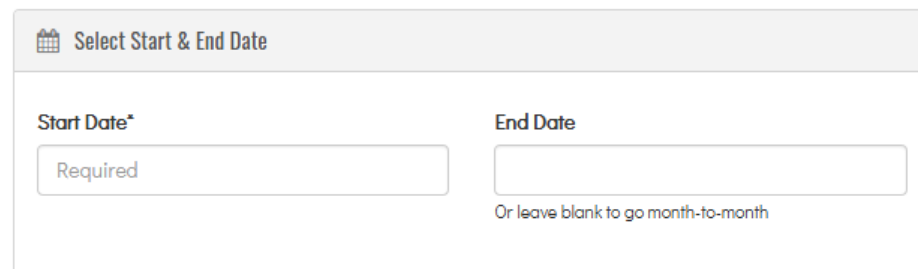
When you do so, the new person will be added to the tenants dropdown list.

Set Start and (optional) End Date

Next, select a Start & End Date for the lease:

Every lease in RentalVault must have a valid start date. End date is optional; omitting the end date implies that the lease is month-to-month. Under the hood, RentalVault really just extends the end date out ten years for calculation purposes on an open-ended lease – if you have leases longer than this, you can always create a new one or renew the lease when the time comes.

Add Rent & Other Charges

Click the "Add Charge" link to display the "Add Lease Fee" popup screen:

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Add Lease Fee   ✕

Fee Type
| Rent ▾ |

Amount
| i.e. 1500 |

Due
| Monthly ▾ |

Description
| |

Starting On
| |
(or leave blank to use the lease start date)

Ending On
| |
(or leave blank to use the lease end date)

Paid By
| Tenants ▾ |

Enable Late Fees for this item?
| No ▾ |

Cancel   Save

Select the fee type – you can choose from a large number of different types of charges, including rent, section 8, recurring fees and charges (eg garage or parking fee), one-time charges (application fee, security deposit, etc), or utility bills. If you don't see the specific charge type you need, contact us and we'll add it for you.

You must specify the Amount of the charge, when it is due (monthly, weekly, etc) and the start and end date range for which the fee is valid. If you leave start or end date blank, the lease start/end date will be implied. If the lease end date is blank (month-to-month), and you leave the fee's end date blank, it will also be considered to be open-ended.

RentalVault will generate the payment schedule for the charge based on the Start Date and recurrence setting specified in the "Due" dropdown list. For example, a fee with a start date of January 2 and a "due" setting of monthly will generate receivables for January 2, February 2, March 2, etc.

Specify whether the fee/charge is to be paid by tenants, or a different person or entity. Normally, you will choose "Tenants" for this option – exceptions might be Section 8 payments where the tenants don't actually pay this portion, but a government housing authority does – in cases like this, select "Other, Non-Tenant Payer" and type the name of the payer into the "Specify Payer Name" textbox.

Late Fees

Each and every charge/fee whether it is rent, or otherwise, can have late fees enabled for it. To do so, switch the "Enable Late Fees for this item?" dropdown to "Yes". The Late Fee Settings options are shown:

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Select the type of late fee structure you want to use – either Flat Fee, an Amount Per Day, or Percent of fee per day. Changing this option will determine what additional settings you'll need to set up.

Flat fee – a one-time late fee is assessed when this charge is considered late. Enter the amount to be assessed.

Amount per day – a fixed dollar amount to assess for each day the item is considered late. You can enter a base amount plus the amount per day. For example $50 + $2 per day will result in a $56 late fee for an item that is considered 3 days late. Just use a $0 base amount if you just want a per day charge only.

Percent of fee amount per day – this option will apply a percentage to the actual amount of the item due and calculate a late fee from that. For example, entering 1.2 into the "% per day" field on a $1000 rent charge will result in a $12 late fee ($1000 x 0.012) per day assessment.

Grace period – in all late fee cases, you can add a number of days before the item is to be considered late. For example if the item is set up to be due on January 1 (and subsequently monthly on the first of the month), but the grace period is set to 2 days, the item will not be 'considered late' until January 3rd.

When you are done configuring the Charge, click Save to add it to the lease:

Continue to add charges to the lease – when you are done, click the "Create Lease" button to save the Lease record. Note that if you originally selected multiple units before you initiated the Add People to Selected Units popup, all charges you have added will be added to **each** lease. If you want to customize each charge separately across units, you must configure each lease separately.

If you were on the Units page, the unit will move from the Vacant tab to the Leased tab. If you were on the People page, the person will move from the Inactive/Applicant or Former tab to the Active tab, and the lease(s) is/are created.

From People (linking a unit to a tenant)

Similar to creating a lease from the units screens, you can also do it from the perspective of the People screens in RentalVault. In this case, start on the Units page, and check the box next to a particular person (or persons) you want to add into a unit.

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2 prospective tenants & applicants		
☐	⇕ First	▲ Last
✔	Christine	Diaz
☐	Ryan	Johnston

50 rows / page ▼

Then click the "Lease Unit" button:

🔑 Lease Unit

TIP: using the 'from units' method in the previous section you can lease more than one unit to any number of tenants at a time. From this perspective of the Persons screens, you can only add multiple people to a single unit. Either method will give you the flexibility and options you need depending on your scenario.

The "Assign a Unit to Selected People" popup screen appears:

Assign a Unit to Selected People

🏠 Assign Unit To People

People	Unit*
▪ Charles Wilkerson	1093 Smith Valley
▪ Marsha Yeo	

If you've selected a single person, he or she will show – if you've selected multiples, they will appear in a list as shown above. Also displayed is the Unit dropdown list where you will choose which unit is leased to these people.

Select the unit you wish to lease from the dropdown list.

Note: all of the other options on this screen are exactly the same as those on the "Add People to Selected Units" popup screen when you create a lease using the "From Units" method described in the previous section. These options include setting the start/end date for the lease, adding charges & fees, and setting late fee options. See the "From Units" section for more details about those lease options.

Once you have saved the new lease record, the person will move from the Inactive/Applicant or Former tab to the Active tab. The unit will now be active and not vacant.

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Leases Page

The Leases page shows you full listing of all leases on your account, either for the current owner, or for all owners, if selected. Click the Leases toolbar item and the Leases page appears:
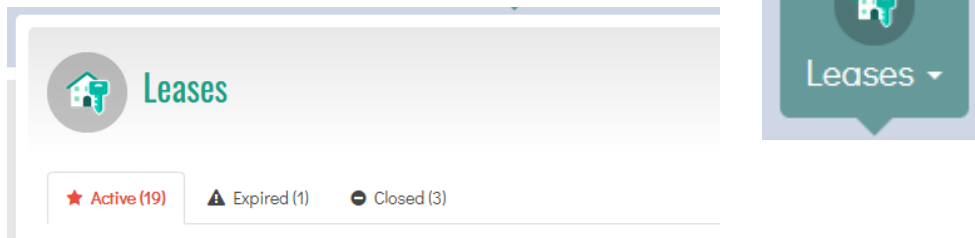
The Leases page is organized by lease status – leases are either Active (having a current lease period), Expired (the lease end date has been reached), or Closed (leases that are closed by you). Adding a new lease will normally cause it to appear first on the Active tab – after it has expired it will transition to the Expired tab, and after you close it, the Closed tab.

Just like the Units and People screens, you can filter the Leases page by typing search criteria into the 'Search any field' text box. This screen can also be sorted by clicking on the column headers. You can further filter the leases shown by city and/or property group.

Clicking a single row on the Leases page ...

	Property	Tenants	Start	End	Balance Owing
	138 Seaside / 138, 9190 Seaside Lane SW	Charles Wilkerson	Mar-4-2024	Month-to-Month	0.00

...will open a Details panel on the right side of the screen:

This panel shows detailed information about the lease, including tenants and unitinformation, total balance outstanding, amount due this month, amount paid/collected, and the same for last month.

All charges & fees on the are summarized, including the amount due and recurrence pattern, start and end date, and any late fee configuration.

This panel also shows files that have been attached to the person, as well as handy shortcut buttons to the Collect Payment screen, Rent Roll, and Payment History.

To modify or view more information about the Lease, click the Lease Settings button.

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Making Changes to Existing Leases

Once you have correctly added and configured a lease record, the charges for it will begin to accrue in the RentalVault rent roll, and you won't have to revisit the settings of the lease very much. If you need to add a new charge to the lease, make changes to dates or late fees, or add a new tenant onto the existing lease, you'll need a way to edit the lease. You can also renew an existing lease, or close a lease if tenants are moving out. All of these operations and scenarios are described in the following sections.

Edit a Lease

There are a number of ways to get to the Lease Settings/Edit screen:

The Details panel → Settings button of the Unit details panel. From the Units page, click a unit row on the Leased tab to show the details panel – the lease Settings button is highlighted:

The Details panel → Settings button the Person details panel. From the People page, click a unit row on the Active tab to show the details panel – the lease Settings button is highlighted:

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The Lease Settings button on the Details panel of any lease record on the Leases screen:

Anywhere else in the system where you find a lease settings button, for example, on the Dashboard → New Leases panel:

Or, the lease context dropdown menu on the Rent Roll or Payment History screen:

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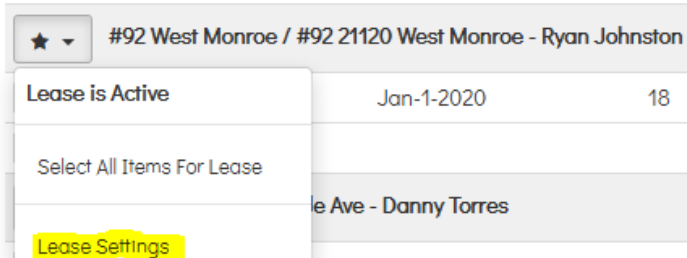
In each case, the Lease Settings page is shown:
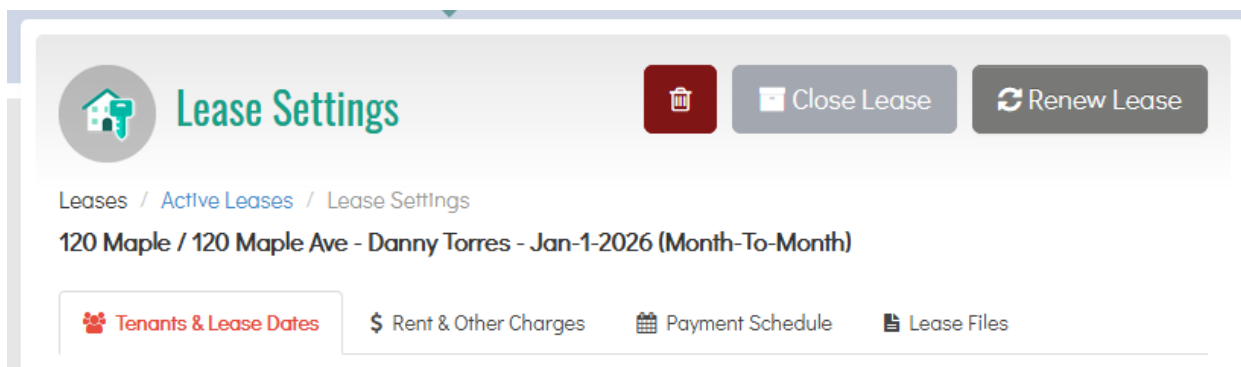
The Lease Settings is organized across a number of tabs:

Tenants & Lease Dates tab

On this tab, you can add or remove the tenants assigned to the lease. By the time you have reached this page, the lease record will have already been created, and you should see one or more tenants already on the lease in this tab. You can click the "Add Person" button add more:

Also on this tab you can make changes to the Start and End dates on the lease. The start and end date of a lease may affect start and end dates for any charges & fees on the lease that don't have explicit start/end dates of their own set.If you want to make changes to the lease dates, click in each field and set the date (or leave the end date blank for month-to-month) and click the "Save Dates" button.

Important: if there already are existing payments recorded for the lease, you won't be able to make changes to start or end date of the lease:

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This is because existing payments (and their state of being late or one-time, as well as corresponding late fee calculations, etc) are linked to a particular receivable period (due date) that is generated based on the lease start and end date. Rather than require you to painstakingly migrate prior payments to new payment due date periods, it is less complex to lock down the lease start/end date after payments have been recorded for it. If you need to start over and change the lease dates after payments have been recorded, you can either create a new lease for the same tenants and unit, or just delete the existing payments on it from the payment history and go back into the lease edit screen afterwards.

Similarly in this case (existing payments), you won't be able to make changes to rent & other charges:

You can, however, add new charges/fees to the lease, even if there are existing payments for other charge types.

Rent & Other Charges

This tab is where you add any items the the tenant(s) are required by the lease to pay. These items include Rent, and many other kinds of one-time or recurring charges & fees. Add as many as are appropriate, and each will appear as line item on the Rent Roll and Collect Payment screens, and will show on invoices and receipts and other reports as they become due and/or paid.

Assuming there are no existing payments on a particular rent charge or other fee, you can make changes to existing charges, but in all cases you can always add new charges here:

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Rent & Other Charges

Type / Description	Start / End Date	Amount	Late Fee	Due	$ Add Charge
Rent	(Lease Start) - (Lease End)	1,000.00	None	Monthly	✏️ 🗑️

Click the Edit button to modify an existing charge/fee, or delete to remove it.

Click the "Add Charge" button to add a new charge – the "Add Lease Fee" screen appears:

Add Lease Fee ✕

Fee Type
Rent ▾

Amount
i.e. 1500

Due
Monthly ▾

Description

Starting On

(or leave blank to use the lease start date)

Ending On

(or leave blank to use the lease end date)

Paid By
Tenants ▾

Enable Late Fees for this item?
No ▾

Cancel   Save

Select the fee type – choose from a number of rent types, charges, fees, deposits, section 8 / public housing payments, and utility bill payments from this dropdown.

Enter the amount of the charge/fee/rent item. You can only enter numeric values in this field (currency symbols and commas, etc are omitted) – for example, you can enter dollars and cents: 1450.50.

Choose how often the payment is due – either monthly, one-time, bi-monthly (twice a month on the days you define – the5[th] and the 25th, for example), every two weeks (14 days), daily, quarterly, every 6 months, or yearly.

You can enter a descriptive comment for the charge in the 'Description' field.

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Select the start and end date for the charge – i.e. the validity period for when/how long to calculate this payment as due. You can leave either field blank to defer to that of the parent lease date – i.e. if you leave the start date blank here, the lease's start date will be assumed; if you leave the end date blank the lease's end date will be used (or on-going, in the case of a blank/month-to-month lease).

Specify whether the fee/charge is to be paid by tenants, or a different person or entity. Normally, you will choose "Tenants" for this option – exceptions might be Section 8 payments where the tenants don't actually pay this portion, but a government housing authority does – in cases like this, select "Other, Non-Tenant Payer" and type the name of the payer into the "Specify Payer Name" textbox.

Late Fees:

Each and every charge/fee (whether it is rent, or otherwise), can have late fees enabled for it. To do so, switch the "Enable Late Fees for this item?" dropdown to "Yes". The Late Fee Settings options are shown:

Enable Late Fees for this item?

Yes

Late Fee Settings

Flat fee

$ Flat fee amount

Grace Period

days

Select the type of late fee structure you want to use – either Flat Fee, an Amount Per Day, or Percent of fee per day. Changing this option will determine what additional settings you'll need to set up.

Flat fee – a one-time late fee is assessed when this charge is considered late. Enter the amount to be assessed.

Amount per day – a fixed dollar amount to assess for each day the item is considered late. You can enter a base amount plus the amount per day. For example $50 + $2 per day will result in a $56 late fee for an item that is considered 3 days late. Just use a $0 base amount if you just want a per day charge only.

Percent of fee amount per day – this option will apply a percentage to the actual amount of the item due and calculate a late fee from that. For example, entering 1.2 into the "% per day" field on a $1000 rent charge will result in a $12 late fee ($1000 x 0.012) per day assessment.

Grace period – in all late fee cases, you can add a number of days before the item is to be considered late. For example if the item is set up to be due on January 1 (and subsequently monthly on the first of the month), but the grace period is set to 2 days, the item will not be 'considered late' until January 3rd.

When you are done configuring the Charge, click Save to add it to the lease:

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Payment Schedule tab

The payment schedule tab is an informational tab showing a complete table of payments due for the lease. Based on the lease start & date settings, and the settings of any charges & fees you have added, this table will show every payment, how much is due, and when it is due. This is a general overview of what a tenant can expect to pay once you have finished configuring the lease, and is a good place for you to review everything prior to starting to invoice the tenant and collecting payments.

Adjusting Specific Receiveables/Payments

The payment schedule tab on the Lease Edit screen shows payments that are expected to be due for the lease. These are derived by RentalVault based on the settings of each charge/fee that you add to the lease, including whether the fee is due monthly/weekly/one-time/etc, the start and end date, etc. You can make changes to prorate individual payments due by clicking the pencil icon for an individual item in the payment schedule:

The "Override Amount Due" popup appears:

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Specify the new amount due for the selected period and click Save Changes, or you can choose to Delete this receiveable, which removes it from the payment schedule and the corresponding rent roll.

Adjust Rent Due On A Go-Forward Basis

In addition to modifying the amount due for individual items, or even deleting the item altogether, you can also choose to adjust an amount due from a point in time onward. This allows you to make a change from a date forward and apply that change to all of the subsequent due dates from that point on - this is helpful when you want to increase a tenant's rent (or decrease) part way through the lease:

Hover over the row/item that represents the date/fee you want to adjust going forward, as you do so you'll see the "go-forward" icon appear for that row:

Type/Description	Adjust
Rent / Rental Payment from Tenant	✏
Rent / Rental Payment from Tenant	✏
Rent / Rental Payment from Tenant	✏ ⤢
Rent / Rental Payment from Tenant	✏

Click the icon/button and the "Adjust Amount Going Forward" popup appears:

Adjust Amount Going Forward ✕

Set Rent / Rental Payment from Tenant To

220.00

For Each Item Due On Or Later Than

Jul-01-2020

Cancel   Apply Adjustment

Specify the new amount of from July 1 going forward (i.e. for the July 1 item and all rent after June 1). Note that the amount you set is not the amount you are increasing or decreasing - it's the new, full amount that will be now due.

Click "Apply Adjustment" and your changes are finalized - you'll see now that on the Rent Roll screens and reports, and in the Collect Payment screen, that the new amount is expected for the date range you have selected.

Lease Files tab

Like many other areas (Units, People) in RentalVault, you can upload files here – this tab lets you add files specific to this lease – for example, actual copies of lease paperwork (the signed lease documents, addendums or appendices to the lease, or whatever else makes sense for your situation).

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Renew a Lease

When a lease has expired, or is nearing expiration, you have a decision to make whether to keep the existing tenants in the unit and renew their lease, or close the lease and rent the unit to new tenants, or not at all. In the case where you want to re-lease the same unit to the same tenants, you can choose the Renew Lease option to do that quickly.

Note: if you want to make changes to the tenants (either add additional ones or remove some existing ones), you should in most cases close the existing lease rather than renew it, and create a new lease afterward. This is also true if you want to make adjustments to the settings or dates of any of the charges & fees on the lease before you renew it.

Click the "Renew Lease" button on the Lease Settings page:
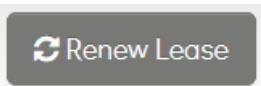
⟳ Renew Lease

The "Renew Lease" popup screen appears:

Renew Lease	✕

This lease will be closed and a new lease will be created with the following settings:

Current Lease Start Date	New Lease Start Date
Jan-1-2026	January 31, 2027

Current Lease End Date	New Lease End Date
Month-To-Month	December 31, 2027
	(or leave blank to go month-to-month)

Configure New Rent & Fee Settings:

Type/Descr	Current Start-End Date	New Start (leave blank for lease start dt)	New End (leave blank for lease end dt)	Amount	Due
Rent Late Fee (None)	(Lease Start) - (Lease End)	January 19, 2020	Lease End	1,000.00	Monthly

You can make additional changes to the new lease once you've completed the renewal process.

Note: this lease is already month-to-month with an open-ended lease end date. You may not need to extend this lease.   Cancel   Renew Lease

This screen shows you the current start date of the existing lease and assumes the renewed lease will start "today". Adjust the "New Lease Start Date" and "New Lease End Date" accordingly. Ideally you won't have overlap between the start-end dates of the old lease and that of the new lease, but whatever dates you choose are acceptable.

All of the existing charges & fees on the existing lease are shown. You can make start/end date changes for the new lease's corresponding charge, as well as the amount that will be due. This is a good place to adjust the rent up if such an increase has taken place with the renewed lease. Note that you cannot make changes to the recurrence (monthly, yearly, weekly, etc) setting of any charges, nor can you add new charges or remove them here.

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Special note: In the case (as shown in the screenshot above) where the existing is already month-to-month (has no end date), you might not really need to renew the lease, as RentalVault already treats it an ongoing concern, and will keep it open and active. If you want to make changes to specific charges or convert the new lease from month-to-month to a fixed end date, proceed normally with the renewal. Either course of action is fine; this warning is mostly just informational as a heads up that the current lease is already self-renewing for those most part.

Click the "Renew Lease" button and the existing lease is closed automatically, and a new lease is created with the same tenants, new start/end dates, and the same charges and fees (with updated dates/amounts) as required. RentalVault will then redirect to the **new** lease settings page where you can make additional adjustments if necessary.

Leases / Active Leases / Lease Settings

120 Maple / 120 Maple Ave - Danny Torres, Adam Driver - Jan-19-2020 (Month-To-Month)

Lease Renewed The old lease has been closed, and this new lease has been created. You can make more adjustments if required here.

Close a Lease

If a lease has expired (and they are not renewing) and you want to move the existing tenants out, you should close the lease and free up the unit to lease to another tenant. While you can certainly have multiple active leases on the same unit at the time in RentalVault; this scenario should be the exception rather than the rule, otherwise you're likely adding an unneeded level of complexity.

Most of the time, you should either renew a lease, or close it. To close it, click the "Close Lease" button on the Lease Settings screen:

Close Lease
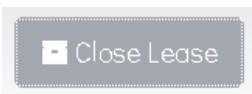
You'll be prompted to confirm the close operation:

This lease will be closed. All info for this lease is retained for archive purposes, but you will not be able to re-open this lease once it has been closed. You can, of course, create a NEW lease record for this property and these (or any) tenants. Continue?

OK   Cancel

As this message states, all closed leases are archived, not deleted, and all associated lease data (files, receivables, payment history, etc) are retained in the software and you can always pull up old, closed leases to view.

Leases – A Summary

Now that you have units, people (tenants), and leases added to your account, RentalVault will now start to automatically generate payments due (receivables) for all of the active leases and charges & fees you have defined. These receivables appear as line items on the Rent Roll and Collect Payments screens, and are covered in the following sections.
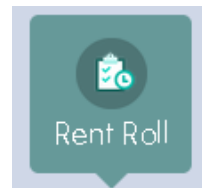
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Rent Roll

The Rent Roll screen is a real-time depiction of every lease in your portfolio (and the associated units and tenants that are linked), showing a summary of what's outstanding, how late it is, and what's owed. Each line item (receivable) is calculated based on your leases' settings, and the settings of the charges & fees that comprise them.

Rent roll can be generated based on what's due today (now), or what will be due at any point in the future. Late fees are automatically calculated and totaled.

View Rent Roll

To view your rent roll, click the Rent Roll button on the main toolbar:

The Rent Roll screen is shown:

Each line item is an amount due that can be collected separately, or combined and collected together in one payment (or split payments).

Filters:

You can filter the rent roll list to a particular unit by selecting it from the "All Units/Leases" dropdown list. You can also show only those items that are "Due or Late" now, due this month, due next month, due last month, past 60 days, etc by selecting a date range filter. The As Of date textbox lets choose the date that the rent roll is calculated from – you can use this to view rent roll due in the future, for example. Finally, you can choose to hide or show fully paid items, and/or hide or show closed leases.

Overriding Receivables

The amount due shown for each receivable is based on the amount predefined in the charge/fee settings for the lease setup. It is calculated by considering how much, if any, has been already received for that item. Late fee receivables are calculated based on the late fee settings for the corresponding charge/fee, and by how many days the charge is considered to be late.

There are scenarios where you want to override or modify the amount due for a specific charge item – perhaps you have an agreement with the tenant to accept a modified, or discounted amount for the month, or you want to receive less for this month,

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and more for the next month, etc. On the Rent Roll screen you can easily changes to the amount due by clicking the override button:

The "Override Amount Due" popup appears:

Enter the new account for the charge, and click the "Save Changes" button. If you want to remove this receivable and have this payment no longer due, click the "Delete" button.

Waiving Late Fees

Sometimes you will want to waive a late fee for various reasons. To do so, click the "Waive Late Fee" button:

The "Waive Late Fee" popup appears to confirm the change:

Click "Waive Late Fee" and the late fee is removed from the Rent Roll list, and is no longer due for this month/week/lease period.

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Printing the Rent Roll Report

You can generate and print (or export and email, etc) your complete Rent Roll report, or a subset of receivables. Filter the rent roll on the screen first using the dropdown lists

| Search any field | All Properties/Leases ▼ | All Due Or Late ▼ | January 22, 2020 | ⊘ | $ | ⊘ | ⊖ |

You can adjust and select:

- All receivables or those for a specific unit/lease
- All Due or Late, or a specific date range
- As of a specific date (eg. today, or in the future)
- Display or hide fully paid items in the rent roll report
- Show or hide closed leases

Once you are satisfied with the receivables to include, click the "Print Rent Roll" button:

≡ Print Rent Roll

The "Generate & Print Rent Roll" popup screen appears:

Generate & Print Rent Roll   ✕

▼ Filters

- All Properties/Leases
- All Receivables
- All Due Or Late
- As Of January 22, 2020
- Include Fully Paid Items
- Exclude Closed Leases

≡ Rent Roll Settings

☐ Include Payment History
☐ Group by Owner
☐ Group by Property

Cancel   🖶 Print Rent Roll

Controlling Which Receivables Appear on the Rent Roll report:

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Your rent roll generation & print options will reflect the current filters on the Rent Roll screen – if you have checked a select number of receivables, the "Filters" options on this popup will show "Selected Receivables Only" – if you have selected all, it will specify "All Receivables". It will also reflect any date filters, whether you have 'Include Fully Paid Items' or 'Include/Exclude Closed Leases' enabled or disabled, and the current 'As Of' date. See the "Filters" paragraph of the "View Rent Roll" section above for more information about these filters.

Controlling How Receivables Are Displayed:

This popup screen also allows you to configure whether to include any payment history for each receivable, whether to group receivables by Unit (all receivables for a unit will roll up together), and/or whether to group receivables by Owner (if applicable, all receivables will roll up by the unit owner).

Once you have configured your rent roll to display the way you want, click the "Print Rent Roll" button to generate it – the report is generated and show in the Print View tab:

Emailing the Rent Roll

To email the rent roll, click the "Email Report" button on the Print View tab and the "Email Report" popup screen appears. Enter an email address, select a template (if applicable) and/or enter a subject and body for the message, and click "Send Mail" – the rent roll is sent as a PDF attachment. See the "Emailing Invoices" section below for more information about emailing these reports, as the two procedures are similar.

Generating Invoices

RentalVault makes it extremely easy to generate, print, and email invoices to your tenants. Invoices can be generated for all tenants and receivables, or a selected subset of receivables or tenants. You can also choose to group all items for each tenant on one printed invoice, or group all items of a particular charge type together. You can even have one invoice per line item if you choose.
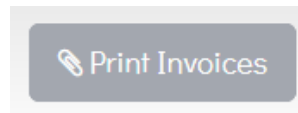
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To generate invoices, first select one or more receivable line items from the Rent Roll to produce an invoice for:

You can choose all items by clicking the check box at the top of the list. Also, as a shortcut, leaving all boxes empty also assumes you want to invoice all items.

Click the Print Invoices button:

The "Generate & Print Invoices" popup screen appears:

Generate & Print Invoices ✕

▼ Filters

- All Properties/Leases
- Selected Receivables Only
- All Due Or Late
- As Of January 19, 2020
- Include Fully Paid Items
- Exclude Closed Leases

✎ Invoice Settings

Invoice Date

Today

Separate Invoices:

For Each Tenant ▾

Controlling Which Receivables Appear on Invoices:

Your invoice generation & print options will reflect the current filters on the Rent Roll screen – if you have checked a select number of receivables, the "Filters" options on this popup will show "Selected Receivables Only" – if you have selected all, it will specify "All Receivables". It will also reflect any date filters, whether you have 'Include Fully Paid Items' or 'Include/Exclude Closed Leases' enabled or disabled, and the current 'As Of' date. See the "Filters" paragraph of the "View Rent Roll" section above for more information about these filters.

Controlling How Receivables Are Displayed:

This popup screen also allows you to configure *how* the items are displayed on grouped into invoices.

The "Separate Invoices" dropdown list offers the following choices:

For Each Tenant: all receivables for each tenant will be grouped together on the one invoice.

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For Each Tenant & Payment Type: all receivables will be grouped by tenant and payment type – receivables for each payment type will appear together on a single invoice.

For Each Amount Due: every receivable will have its own invoice.

All Items on One Invoice: all selected items on one single invoice.

Other options in the "Invoice Settings" panel include customizing the invoice date, starting the invoice # at a particular starting point, and prefixing the invoicing number with a number of set of characters (eg. for an invoice # of INV-231, use "INV-"). Invoice numbers will start at the number you specify and increment for each invoice, based on the grouping settings you choose (each tenant, each tenant & payment type, etc). The system will remember the last invoice # from the previous invoice run (across all users on your account) and increment starting from the last invoice number from the previous run. Finally, you can also include an invoice comment – this comment will be saved for next time as well.

Once you have configured your invoicesto display the way you want, click the "Print Invoices" button to generate them – the invoices are generated and shown in the Print View tab:

Print View

Page 3 of 3 | PDF (.pdf)

Maple City Properties LLC   Invoice

Suite 92, 1490 117 West Monroe   00235
Chicago Illinois 66066   January 22, 2020

Bill To:
Danny Torres, Adam Driver
120 Maple Ave Chicago Illinois
120 Maple

DESCRIPTION	DUE DATE	AMOUNT DUE	PAID	PLEASE PAY
Rent	Jan 19, 2020	1,450.50	0.00	1,450.50
			TOTAL	1,450.50

Each invoice (based on your separation settings) appears as a different page in the report. You can export these to PDF files and print, save, or send, or you can use the "Email Report" functionality to email them either to yourself, a specific email address of your choice, or send each tenant their own invoices easily.
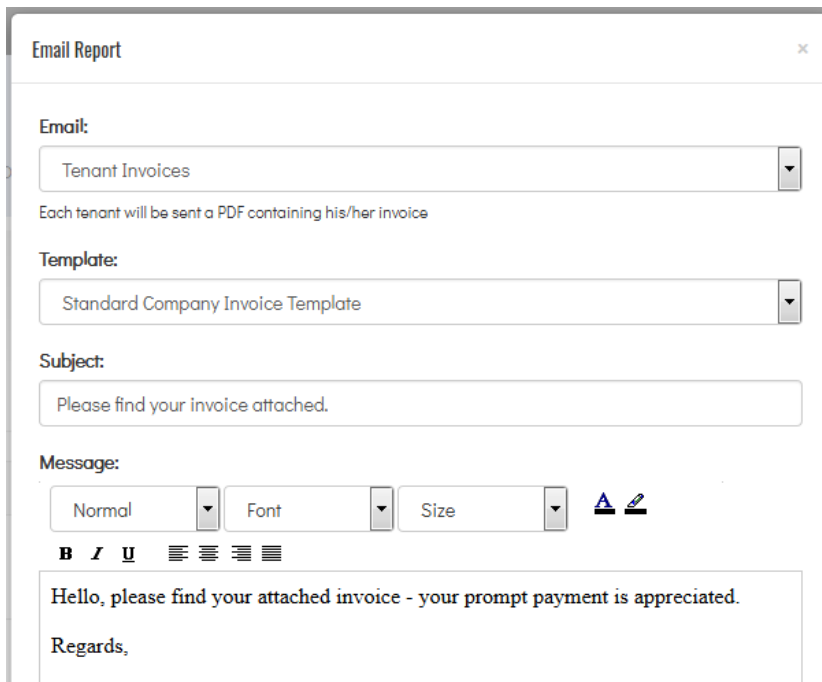
Emailing Invoices

RentalVault makes it easy to email all the invoices you have generated for the month to your tenants – each tenant will receive only their own invoice, and you only have to click once to send them all automatically.

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Note: obviously, in order to be able to email invoices to tenants you'll need to make sure at this point that you have entered your tenants' email addresses into their Contact Info panel of the Edit Person page.

Once you have generated an Invoice and it appears on screen in the Print View tab of the Rent Roll page, click the "Email Report" button. The "Email Report" popup screen appears:

You can choose to email "Tenant Invoices", which sends each tenant (with a valid email address in the system) a <u>separate email</u> (not CC:d, or BCC:d) containing their invoice as an attachment, or you can choose to send the invoices (as a single report, and single file attachment) to an email address of your choice with "One File, Single Recipient".

You can also select a predefined Email Template for the email subject and body – for example, you can choose from the default "Invoice" email template, or create your own – see the "Email Templates" section for more information on creating and using email templates.

Finally, click the "Send Email" button to initiate the bulk email process.

Automating & Scheduling Invoice Generation

In addition to generating and emailing invoices manually with just a few clicks each month, RentalVault also enables you to further reduce administration time and effort by automating this task for you.

By using the invoice auto-scheduling features, you can have RentalVault automatically generate all your tenant invoices, and email them separately (and with a customized email subject and message body) to each tenant monthly or weekly on the day you specify. This "set it and forget" operation will really put your invoice operations on auto-pilot. Here's how to enable this feature:

On the Rent Roll page, click the "Schedule automated invoices" button.

The "Schedule Automated Invoices" screen appears:
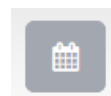
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Schedule Automated Invoices ✕

📅 **Scheduler Settings**

Automatic Invoice Generation
| On ▾ |

Frequency
| Monthly ▾ |

Email Options:
☑ Email each tenant his/her own invoice

On the
| 1st ▾ |

Email Template
| Standard Company Invoice Template ▾ |

☑ Email me a PDF of all invoices sent.

❷ Turning this scheduler on will automatically generate invoices for all your active tenants, based on the frequency and email delivery options you choose.
NOTE: Emails are sent at approximately 1 AM (Pacific Daylight Time) on the day you select.

| Cancel | | Save |

Toggle "Automatic Invoice Generation" to **On** to enable this feature. You can choose between a Monthly or Weekly invoice schedule, and specify the day of the month or day of the week, accordingly.

Email Options

"Email each tenant his/her own invoice" - each tenant will receive a customized email (subject/email body) based on the pre-defined Email Template you choose for the message.

"Email me a PDF of all invoices sent" - sends a confirmation email of the invoice batch run with an attached PDF containing a copy of each invoice that was generated.

Click "Save" to finalize your changes.

Note: emails are sent at approximately 1AM Pacific on the day you have configured. Invoices will have an "as-of" date based on the day they are generated.

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Payments

Once you have units, tenants, leases and charges/fees added, you will start to have receivables accruing on the Rent Roll screens and reports. You can now collect and post payments, run payment history reports, and generate, print and email payment receipts.

Collecting Payments

From Rent Roll:
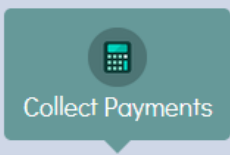
A shortcut to collecting payments for a specific unit/lease is on the Rent Roll screen – the header for each set of receivables contains a "$ Collect Payment" button:

			$ Collect Payment
Rent (Rental Payment from Tenant)	940.00 ✏	0.00	940.00
Late Fee (Rent - Jan-1-2020)	31.00 ✖	0.00	31.00
			$ Collect Payment
Rent (Rental Payment from Tenant)	1,450.50 ✏	0.00	1,450.50
			$ Collect Payment

Click this to navigate to the Collect Payments screen, already filtered to the specific lease.

From the Collect Payments screen:

More commonly, you can also simply click the "Collect Payments" button to display the Collect Payment screen:

Collect Payments

Collect Payments

| | Receivables (0) | Select Property/Lease ▾ | |

0 receivables - select a lease

		Property	Date Due ▾	Days Late	Type

No receivables - select a property/lease first

Total

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The Collect Payments screen requires that you select a unit/lease first to work with. Choose one from the "Select Unit/Lease" dropdown list. The screen refreshes to show receivables for that selection:

Just like the Rent Roll screen, you can filter this list to show only due or late items, or a preset date range. You can also choose to show or hide fully paid items, or closed leases.

You're now ready to post payments.

Collecting Payments

In RentalVault, each receivable can be paid separately or combined on a single check or transaction. Regardless of the method you choose, you can still view payment history on a per-receivable / line-by-line basis, and you can still issue receipts for single items or for the entire batch.

Each payment collection method is described below.

Collecting a Single Receivable (One Payment):

Check the box on the left side of any single receivable, or click the "Pay" button for that line item:

The "Collect Payment" panel appears on the right-side of the screen:

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Enter the details of the payment you are receiving, including the check number (or ACH/EFT confirmation number if you are receiving an electronic payment via e-check or ACH, Visa Debit, etc). Also record the date the payment was received, the amount you are receiving and what tenant it was received from. You can also record a comment if you want.

Click the "Post Payment" button to save the payment record. You'll see the payment reflected in the Collect Payments screen, the Rent Roll, and the Payment History. If you've collected a partial payment, you'll see the remaining amount due as a balance:

Collecting Multiple Receivables In One Payment:

RentalVault

The process for collecting multiple receivables is similar – check the box or click the Pay button **for each** receivable you want to combine onto a single payment:

The Collect Payment panel appears on the right side of the screen:

Ensure that the "One Payment" option is selected, and you can enter the particulars of the payment (received date, amount, check/ACH/EFT#, etc) – this amount will be applied to each receivable you have selected – you can choose how the amount received will be split across the receivables:

RentalVault

You can enter in the payment splits manually; you can also utilize the payment split helper buttons:

 Split payment amounts by prioritizing the amount due (i.e. apply the received amount to the payments in order from the highest amount due to the lowest amount due).

 Split payment amounts by prioritizing days late (i.e. apply the received amount to the payments in order from the most late to the least late).

 Split payment amounts evenly (equally) across each receivable.

In the examples above, pressing the "Split evenly" button will apply the $175 we are receiving equally, so $87.50 for each of the two receivables:

This is probably not a realistic scenario, however, because we would never apply $87.50 against a $35.00 late fee.

Click the "Post Payment" button and your payment will be recorded.

Collecting Multiple Receivables In Separate Payments:

To collect multiple receivables across **separate payments** is also started in the same way – check the box or click the Pay button **for each** receivable you want to receive:

RentalVault

The Collect Payment panel appears on the right side of the screen:

In this case, make sure that the "Separate Payments" option is selected, and in this case you would enter the particulars (check #, date, paid date, etc) for **each payment** separately.

Once you are satisfied with the payments to be collected, click the "Post Payment" button.

RentalVault

Payment History

The Payment History screen is a complete history of every payment you have collected in the system.

Payment history can be generated for each unit/lease, or a single unit/lease, and for all payments or a select date range (this month, last month, next month, etc).

View Payment History

To view your rent roll, click the Payment History button on the main toolbar:

The Payment History screen is shown:
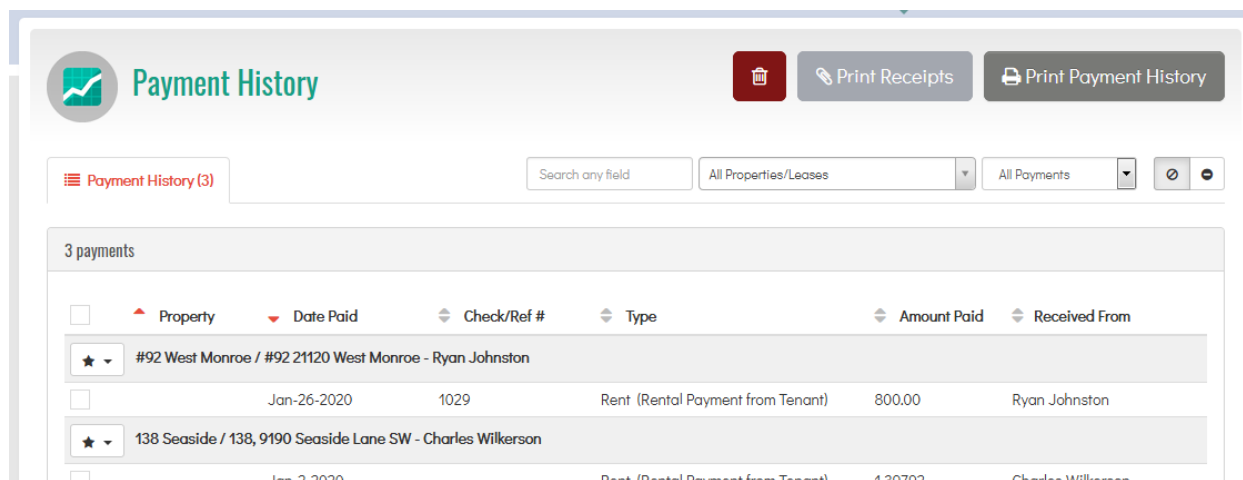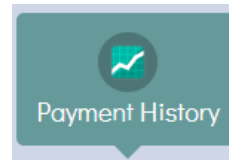
Each line item represents a payment you have collected in the system.

Filters:

You can filter the payment history list to a particular unit by selecting it from the "All Units/Leases" dropdown list. You can also show "All Payments", paid this month, paid next month, paid last month, past 60 days, etc by selecting a date range filter.

You can also choose to show or hide closed leases in the payment history.

Viewing/Editing Payment Details

Click a single row for the payment you want to view or make changes to – the Payment Details panel is shown on the right side of the screen:

RentalVault

You can make changes to the payment details here and click "Resave Payment" to save them.

Printing the Payment History

You can generate and print (or export and email, etc) your complete Payment History report, or a subset of payments. Filter the payment history on the screen first using the dropdown lists

You can adjust and select:

- All units/leases or payments for a specific unit/lease
- All posted payments, or only those for a specific date range
- Show or hide closed leases

Once you are satisfied with the payments to include, click the "Print Payment History" button:

The "Generate & Print Payment History" popup screen appears:

RentalVault

Generate & Print Payment History ✕

▼ Filters

- All Properties/Leases
- All Payments
- All Paid (Any Date Range)
- Exclude Closed Leases

☰ Payment History Settings

☐ Group by Owner
☐ Group by Property

Cancel   🖨 Print Payment History

Controlling Which Payments Appear on the Payment History report:

Your payment history generation & print options will reflect the current filters on the Payment History screen – if you have checked a select number of payments, the "Filters" options on this popup will show "Selected Payments Only" – if you have selected all, it will specify "All Payments". It will also reflect any date filters, and whether you have chosen to show or hide closed leases. See the "Filters" paragraph of the "View Payment History" section above for more information about these filters.

Controlling How Receivables Are Displayed:

This popup screen also allows you to configure whether to group payments by Unit (all payments for a unit will roll up together), and/or whether to group payments by Owner (if applicable, all payments will roll up by the unit/property owner).

Once you have configured your payment history to display the way you want, click the "Print Payment History" button to generate it – the report is generated and show in the Print View tab:

RentalVault

Emailing the Payment History

To email the payment history, click the "Email Report" button on the Print View tab and the "Email Report" popup screen appears. Enter an email address, select a template (if applicable) and/or enter a subject and body for the message, and click "Send Mail" – the rent roll is sent as a PDF attachment. See the "Emailing Invoices" or "Emailing Rent Roll" sections in previous chapters for more information about emailing these reports, as the procedures are similar for rent roll, payments, invoices and receipts.

Generating Receipts

In this section you'll learn how to generate, print, and email receipts to your tenants. Receipts can be generated for all tenants and payments, or a selected subset of payments or tenants. You can also choose to group all payments for each tenant onto one receipt, or group all items of a particular charge type together. You can even have one receipt per payment if you choose.

To generate receipts, first select one or more payment line items from the payment history.

You can choose all items by clicking the check box at the top of the list. Also, as a shortcut, leaving all boxes empty also assumes you want to produce a receipt for all items.

Click the Print Receipts button:

The "Generate & Print Receipts" popup screen appears:

RentalVault

Controlling Which Payments Appear on Receipts:

Your receipt generation & print options will reflect the current filters on the Payment History screen – if you have checked a select number of payments, the "Filters" options on this popup will show "Selected Payments Only" – if you have selected all, it will specify "All Payments". It will also reflect any date filters, and whether you have chosen to show or hide closed leases.

Controlling How Payments Are Displayed:

This popup screen also allows you to configure *how* the items are displayed on grouped into receipts.

The "Separate Receipts" dropdown list offers the following choices:

For Each Tenant: all payments for each tenant will be grouped together on the one receipt.

For Each Tenant& Payment Type: all payments will be grouped by tenant and payment type – payments for each payment type will appear together on a single receipt.

For Each Payment: every payment will have its own receipt.

All Items on One Receipt: all selected items on one single receipt.

Other options in the "Receipt Settings" panel include customizing the receipt date, and including a receipt comment – this comment will be saved for next time as well.

Once you have configured your receipts to display the way you want, click the "Print Receipts" button to generate them – the receipts are generated and shown in the Print View tab:

RentalVault

Each receipt (based on your separation settings) appears as a different page in the report. You can export these to PDF files and print, save, or send, or you can use the "Email Report" functionality to email them either to yourself, a specific email address of your choice, or send each tenant their own receipts easily.

Emailing Receipts

To email receipts, follow the procedure outlined in the **Emailing Invoices** section of the Rent Roll chapter – the process for emailing receipts is almost exactly the same as it is for invoices.

RentalVault

Reports

RentalVault comes complete with a number of prebuilt reports, and new reports get added in each release to the software, in response to customer feedback.

To view a report, click it by hovering over the Reports button on the main toolbar, and select the report you want to run:

Each report contains controls to view the First/Last and Next/Previous page, as well as buttons to export the report to PDF format and download it, where it can be printed or emailed.

You can also email the report directly from RentalVault by clicking the "Email Report" button on this screen.

You can make changes to the filters for the report – each report is slightly different and may offer different filtering options, but in general you can change the owner, unit/tenant/lease from "all" to a specific selection, and click the "Refresh Report" button to re-run the report for those filters.

Other reports might offer specialized filtering; for example, the Unit List report allows you to filter and just show "Vacant" units, or "Leased" units:

RentalVault

Property Status

- ☑ Leased
- ☑ Vacant
- ☑ Leased

RentalVault

Messaging

The RentalVault system provides simplified messaging capabilities with which you can send email messages to tenants, vendors, users, owners, or anyone else in the system. All Messaging functionality is accessed by clickingthe Messaging icon at the top of any RentalVault page:
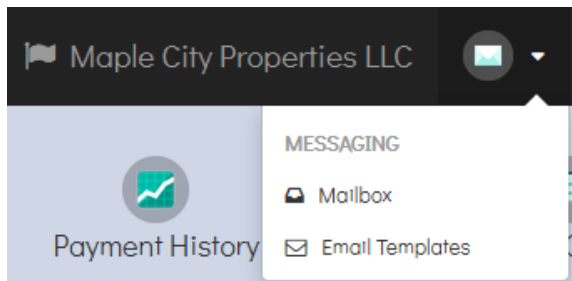
Select "Mailbox" to access the messaging features. You can also access email templates from here (see the Email Templates chapter for more information about email templates).

The Mailbox page is shown:
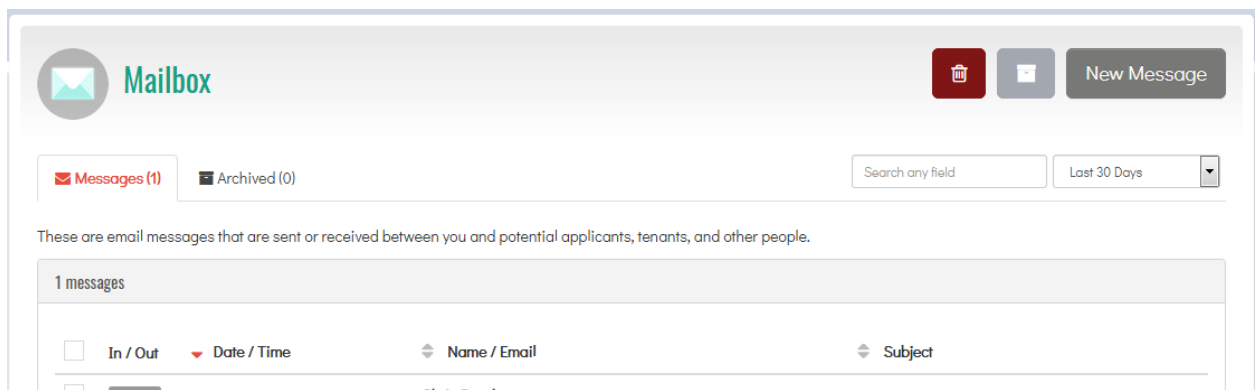
Sending Messages

To send an email message through RentalVault, click the "New Message" button. The "New Message" tab appears:

RentalVault

In the To: field, you can select from current and former Tenants, Owners, and Users. You can also type email addresses in manually. You can specify more than one recipient for the message. Note that each recipient will receive their own, separate copy of the email – no messages will be sent via CC or Bcc.

You can select an Email Template to pre-populate the subject and/or message body if applicable; you can of course edit the subject and message body text manually as you like.

The message body will be sent in rich-text (HTML) format; you can style the text of the message using a basic set of controls including font style and size, weight (bold), underline, italics, font color, font highlight color, etc.

Click the "Send Message" button at the bottom of the message to send it:

Messages sent via RentalVault will appear in the Messages tab; you can click the item to show details for it:

	In / Out	Date / Time	Name / Email	Subject
☐	SENT ⊙	Jan 26 2020 3:04 PM	**Mike Johnson** - mikej@email.com	Please find your invoice attache

RentalVault

Message Details   ↩ 👤 ⬈ ⬇ 📎 ➴ ✖

From: Bert Hopper **To:** Mike Johnson

Date: Jan 26 2020 3:04 PM

Subject: Please find your invoice attached.

Hello, please find your attached invoice - your prompt payment is appreciated.

Regards,

Management
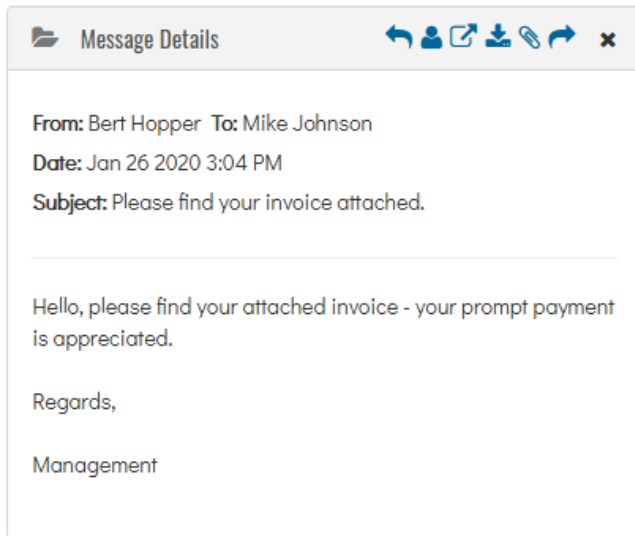
Clicking the message row will display the details panel; here you can reply or forward the email, download any attachments the message includes, etc.

Archiving & Deleting Messages

You can select any number of messages using the checkboxes on the left side of the Messages tab, and choose to either Archive or Delete them. Archived messages will appear on the "Archived" tab – use this tab as a handy way to remove clutter from the standard Messages tab and yet still keep those messages around for safekeeping and reference. Use the delete button to permanently remove old or unwanted messages from your account.

RentalVault

Email Templates

Email templates are useful to create prebuilt templates that you can reuse to minimize the repetitiveness of manually creating the same email text and/or subject over and over. Typically you would create email templates for use in scenarios when you have to send a lot of messages (invoices, receipts, etc) to tenants and the text is (for the most part) the same, but you still to personalize the message text to be specific to each tenant or lease. Email Templates allow you to do that and can be used in a number of places in the RentalVault system.

All Email Template functionality is located from the Messaging → Email Templates menu item at the top of any page or screen:
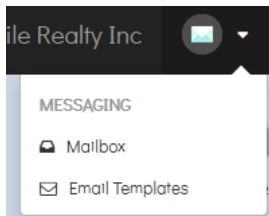
Prebuilt Templates

Your RentalVault account comes with two prebuilt email templates – these are very basic and are just to get you started and indicate how templates can be used. There is a prebuilt template included for Invoices, and one for Receipts:
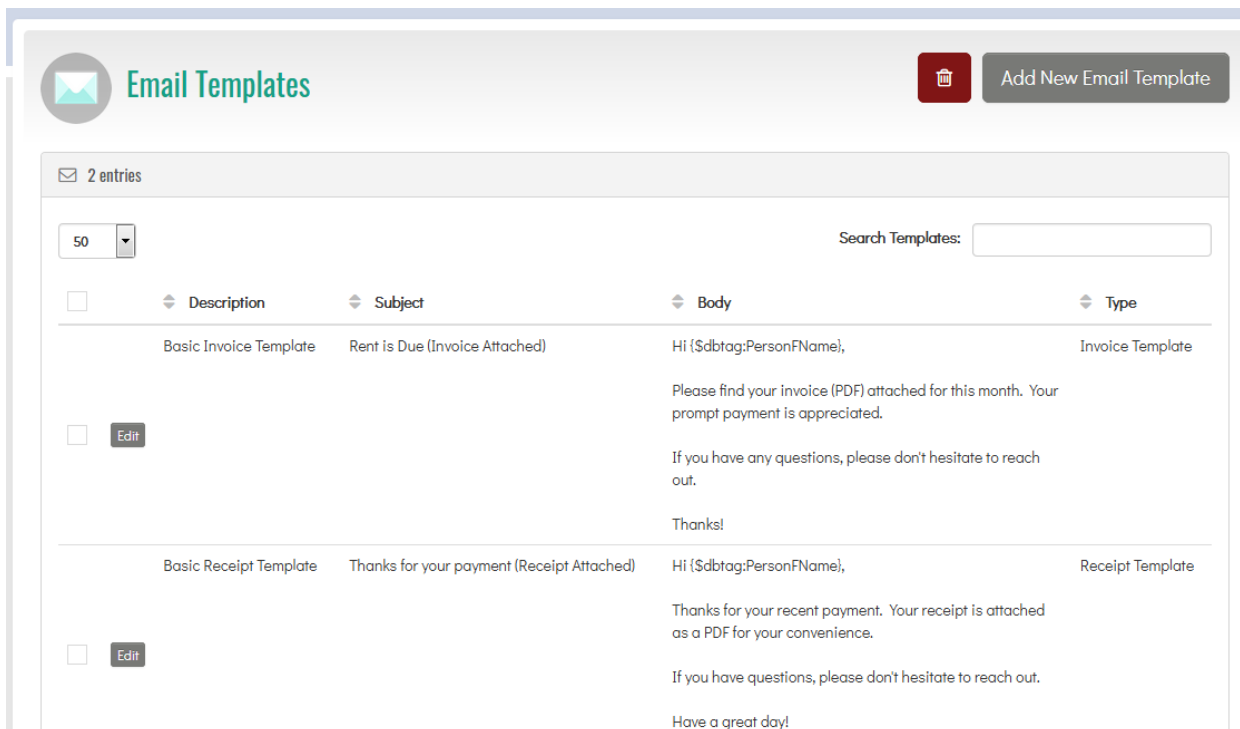
You can edit these templates to suit your specific needs, or create your own for any purpose.

RentalVault

Creating Your Own Templates

To create an Email Template, click the "Add New Email Template" button:

Add New Email Template

The "Add New Email Template" page appears:

Enter a Description for the template, and specify what its purpose is (custom, invoice, or receipt). Enter a Subject for all emails sent using this template, as well as the Email Body. The email body can be populated with database field tags, which allow you to personalize the email message with lease/tenant/unit information.

Using Database Field Tags (Personalization)

Within the email message body, you can insert tags which act as placeholders for dynamically populated, personalized data which will be added at the time the email is sent, based on the personalized information belonging to the recipient. This is similar to 'mail merge' features in Word or other text processors which can customize letters, envelopers, and mailing labels.

Click to set the cursor at the point in your message text where you want the field tag to be inserted, and click to select from the list of fields on the right of the screen.

An example of a basic email template message body with multiple database field tags inserted is shown:

Insertable Lease Fields

These fields are intended to auto-populate **lease** info when sending personalized email messages to **tenants**.

Static email templates can still be created for owners, employees, and other non-tenants; just refrain from including database fields for those types of recipients.

Property Fields

Property (Default Name) | Nickname
Address | City | State/Prov
Property Type | Property Group | Owner
Bedrooms | # Bathrooms
Property Size | Market Rent
Typical Deposit | Property Availability
Application Fee

Tenant Fields

Lease Attributes

RentalVault

Don't forget to click the "Save Email Template" button when you are finished editing the template to save it.

Using Email Templates When Sending Email

With a number of email templates created and saved, you are ready to actually use them in when sending email in RentalVault. Email templates can be used in a number of different areas in the system, including:

- Emailing Invoices
- Emailing Receipts
- Emailing Rent Roll reports
- Emailing Payment History reports
- Emailing other Reports
- Sending Messages (to tenants, owners, users, or any email address)

Each of these scenarios, and how to send each of these documents, is described in other sections and chapters. When you are sending these emails, simply look for the Email Template field to select the template that should be used for this type of email:

RentalVault

Email:

Tenant Invoices ▼

Each tenant will be sent a PDF containing his/her invoice

Template:

None (blank email) ▼
None (blank email)
Basic Invoice Template
Basic Receipt Template

Message:

When you select a template, the subject and the message body will be populated with that of the predefined email template. You can still adjust and customize this specific email as necessary, but note that none of these message-specific changes will be saved at the email template level.

Document Templates

Document Templates enable you to create re-usable documents and forms for things like leases, applications, letters, notices, checklists, addendums, waivers, and much more. These documents can be personalized and customized with database fields such as tenants names, property/unit details, lease details, and more. Every document can exported to PDF, emailed to tenants, or printed. Additionally, you can also embed signature fields in your documents which, when emailed to through RentalVault, will allow tenants and applicants to digitally sign paperwork, and automatically send a signed copy of the document back to you. A signed copy of the document can also be automatically stored with the tenant's profile (if the person record exists in your account) without you having to do anything!

All Email Template functionality is located from the Documents → Document Templates menu item at the top of any page or screen:
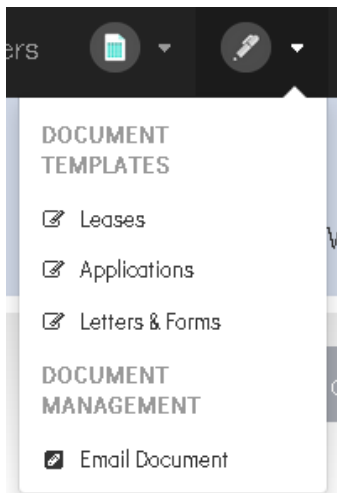
Document Templates are organized into three categories - leases, applications, and letters & forms.
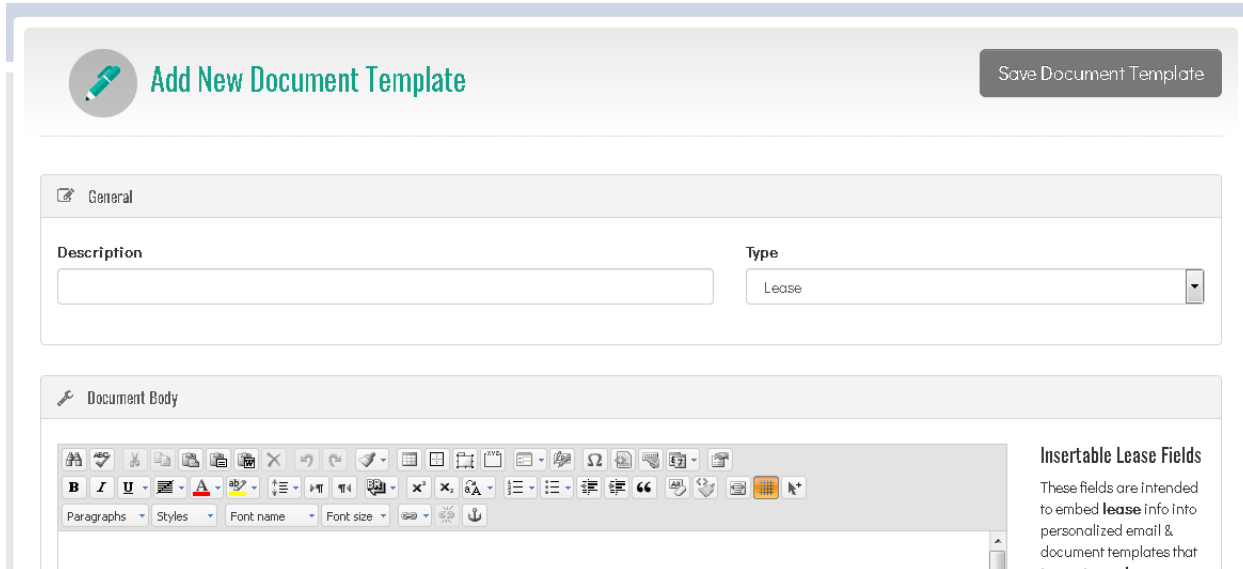
Creating Templates

The procedure to create a document template is the same whether you're creating a lease template, an application, or a letter/form template. For example, to create a lease template, choose Document Templates --> Leases. The Leases screen appears:
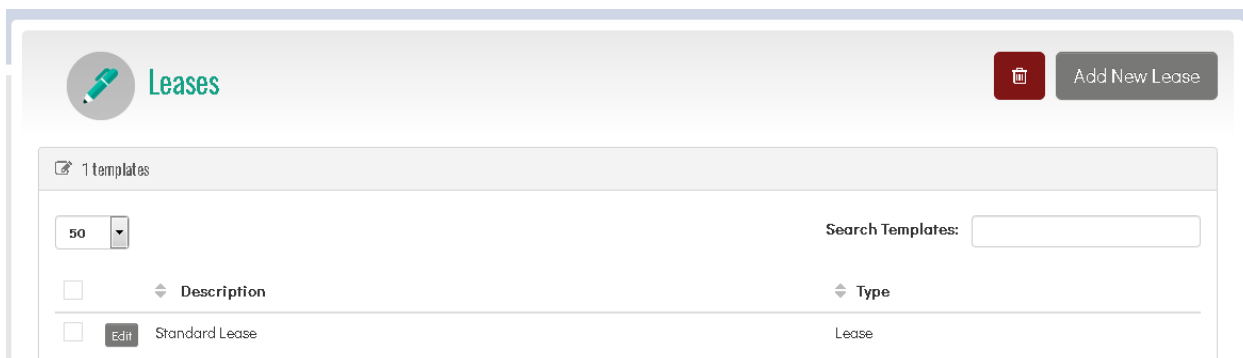
RentalVault

Click 'Add New Lease' and you'll be taken to the 'Add New Document Template' page:

It is here that you can create predefined templates and insert things like form/text fields, radio (choice) buttons, check boxes, etc.

Much like Email Templates, each Document Template can be embedded with **database field tags** that allow the document to be personalized with individual tenant/person/unit/lease data.

You can also insert a '**signature**' line, which (when the document is viewed by a tenant/applicant) will show a space where they can digitally sign their name using the mouse or their finger (on a phone/tablet).

Emailing Documents & Requesting Signatures

Once you have all the documents you need created, the next thing you'll want to do is to send them to a tenant/applicant to have them sign it online.

To do that, click the Email Document menu item:
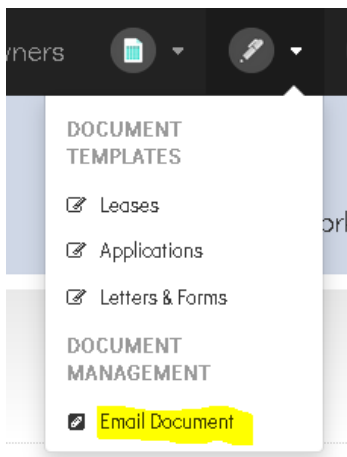
RentalVault

This will display the Mailbox screen, with a "New Message" tab preloaded:
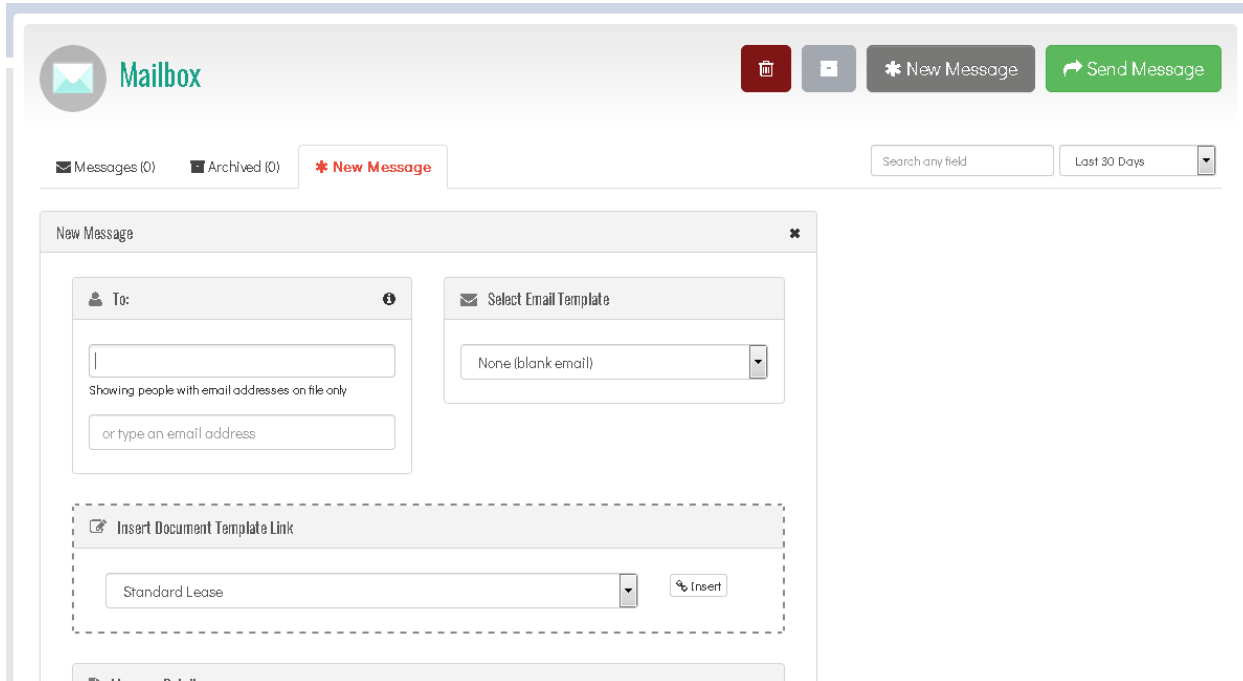
You should first select the tenants/applicants you want to send the document to in the "To:" section. You can also type an email address manually if you haven't already added this person as a tenant or applicant in RentalVault. **Note that if you send the document to a manual email address and not a pre-defined tenant or applicant record, RentalVault will email you the completed/signed form, but it will not ultimately save a copy of the completed form to the tenant's profile unless you pre-selected them here**.

(Again, you should at least add one property, one tenant/person, and connect them with a valid lease record first before you try this, in order to get the full effect of these new features.)

Next, select the Email Template (if applicable) you want to use - this allows you to save time by not having to enter the subject and contents of the email each time - you can change the contents of this email in the "Email Templates" menu item at the top of the main toolbar:
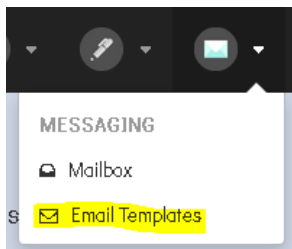
The email subject and the message body should be displayed:

RentalVault

At this point, there is just one thing missing - the link to the Document you want the tenant/applicant to sign. Notice that this screen also has an "Insert Document Template Link" section:

First click into the document to place the cursor where you want the link to be inserted:

Then select the "Rental Application" option and click the "Insert" button.

RentalVault

A link to the document template is inserted into the email body, wherever you had placed your cursor:

Hello, please find your attached lease paperwork - you

https://tenantpay.simplerent.software
/DocumentView.aspx?d=76kesODgpTpMoov%2fQoF

Regards

Now you are ready to send the document - click the "Send Message" button and the email will be sent to the tenant/applicant.

The tenant will receive an email something like this:

to me

Hi Bill,

Please complete this application form:

https://tenantpay.simplerent.software/DocumentView.aspx?t=5ClzPX3y0Uv5bgraTtcX%2bw%3d%3d&d=PV
2bvd57Mfj3BQ%2f4J9GulcBVg%3d

Thanks,
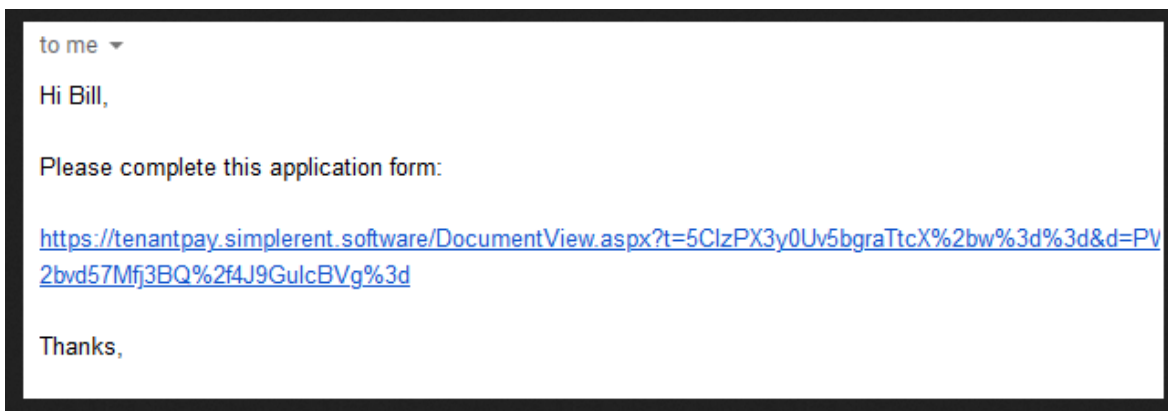
When they click the link, they are taken to an online editable and signable form:

Each of the text fields, radio buttons, checkboxes, etc in the form can be edited by the tenant. Because this document has a signature placeholder in it, they can also now sign it with their mouse:

RentalVault

APPLICANT:

John Smith

SIGN HERE

When they are ready, the tenant can submit the form using the "Submit Document Now" button at the top - the document is submitted to you:

icants: Please fill this application out in full. Incomplete applications will omplete, causing a delay in the process and decreasing your chances of

ION

blanks in this section.

_____ MI. _____ Last Name

_____

_____ Date of Birth ____ / ____ / _____

_____

Alternate Phone

You will receive the completed document as a PDF that you can print or download. If you've selected a pre-existing tenant or applicant record when you sent the document, the completed PDF will also be automatically saved to that tenant's profile, in the person details page, on the "Person Files" tab:

RentalVault

Properties / View All People / Edit Person

📄 General   🔑 Leases   📄 Person Files   💬 Notes & Comments   🏠 Resid

File Uploads

File	Description
⬇ Document.pdf	Rental Application completed online by Bi

RentalVault

Owners   (Admin Users)

If you manage property portfolios for multiple third party owners (i.e. you operate as a property management firm), you will probably need to organize the units, people, and leases in your account into different ownership groups.

As an admin user, you can add Owner records under the Admin → Owners menu item:
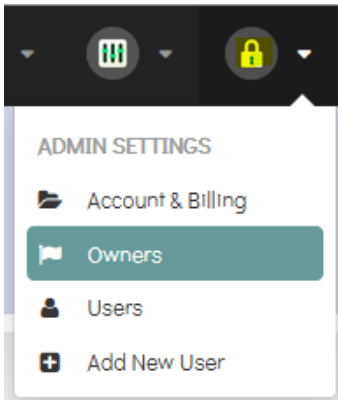
The Owners page is shown:
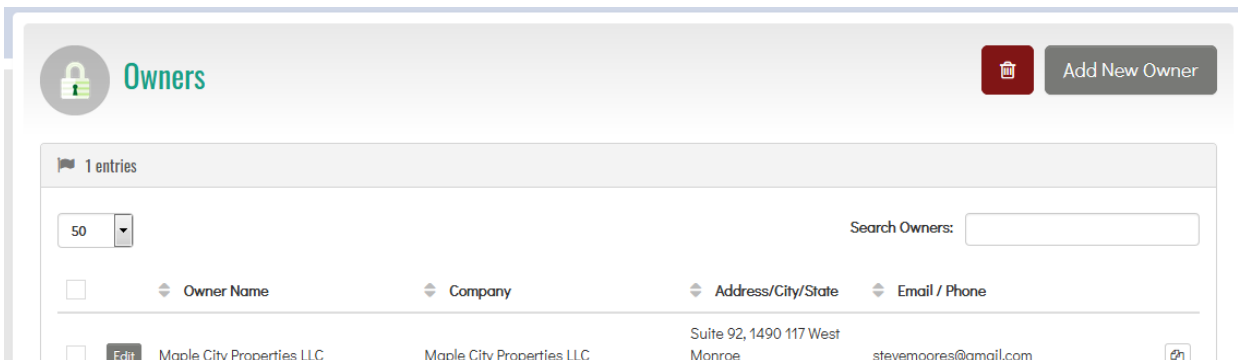
When you first create a RentalVault account, a default "catch-all" Owner record is created for you, based on the name of your company and company contact info when you sign up.

If you manage properties that are primarily all your own, it is likely that you don't need to add any other owners, and the default owner is all you'll need.

If you do manage a large number of properties and they span many different owners, it is probably preferable to separate them by owner. If so, add all of the owner records you'll need here, and when you create unit/lease/person records, you can assign them to the proper owner at that time (for example, the owner drop-down on the Unit details screen is shown):

RentalVault

You can also change the owner for an existing person/unit/lease on their respective Edit/Details screens. NOTE: in order to unlock the owner drop-down lists on these screens, ensure your "Current Owner" setting is set to "All Owners". See the "Changing the Current Owner" section that follows.

Changing the Current Owner

At any given time, your RentalVault account is filtered to show units/tenants/leases and all associated data for a specific owner, or 'all owners' and the only way to change this global filter is to change it at the top of any screen or page. (The exception to this is the Dashboard tabs, which allow owner filtering at the page or panel level).

To see what the current owner that all data is filtered to, view the top header bar on any page in the system:
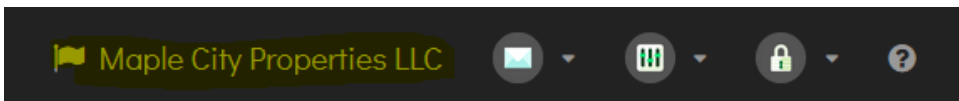
In this example, all data for this account is filtered to only show data for "Maple City Properties LLC" – that is, only those units, tenants/people, leases, payments, etc that have linked to that particular owner record.

To change this owner, click the current owner text – the "Change Owners" panel drops down and is shown:

Click the blue "Change Owners" link text and the "Change Owner" popup screen is displayed:

It is here that you can change owners. If you haven't added any, first add them (admin users only) on the Admin → Owners screens as described in the previous section.

Select the owner portfolio you want to switch to, and click Change. The current page/screen you are on will refresh to show (depending on the context) units, leases, tenants, receivables, payments, etc for that particular owner.

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To show data for all owners, select All Owners. In this case, data will be shown across all owners. On certain pages in the "All Owners" case, an additional owner column will help clarify which records belong where (for example on the Units page):

	Name	Address	Type	Group	Owner
	#88 Calaway Expy, A101	#88 Calaway Expy, A101 Chicago Illinois	House, Single Family		Applegate LLC (Fred & Mike Applegate)
	309 Wilmington	#5A 309 Wilmington West Chicago Illinois	House, Single Family		Maple City Properties LLC

3 vacant properties

In other cases, the owner details will be shown as a description– for example, when viewing "all owner" data, the Rent Roll page will show the owner in the unit header:

Date Due	Days Late	Type	Lease Info	Due
/ #92 21120 West Monroe - Branford Margolis (Maple City Properties LLC)			Jan-1-2024 (Month-To-Month) Branford Margolis	
Jan-1-2020	25	Rent		450.00
/ #92 21120 West Monroe - Ryan Johnston (Maple City Properties LLC)				

RentalVault

Users   (Admin Users)

When you initially create a RentalVault account and sign up for a plan, your first user is automatically created (and is an Admin user by default). You can add more users if you have employees, business partners, or other people that you want to have access to your RentalVault account data.

Every admin user can access the Admin screen, where you can select the Users menu item:
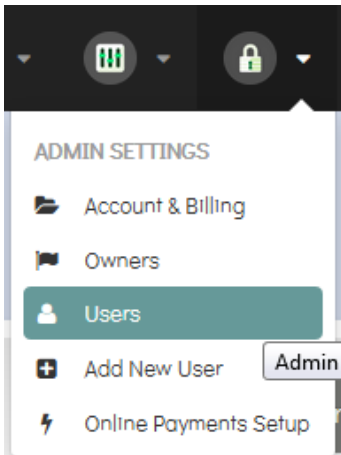
The Users screen is shown:
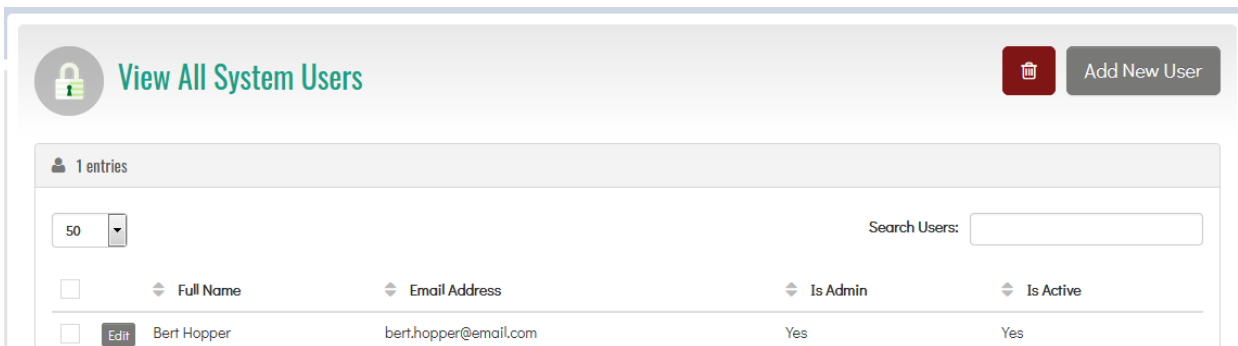
Click the "Add New User" button to add a new user. Enter the full name (required), email address (required), and a contact phone number for the new user. Also select whether this user should have Admin access or not. Keep in mind that having admin access means this new user will also have the ability to add/edit other users, as well as view and modify other admin screens and data, including Owners, account & billing info, and the Online Payments (ACH credentials) configurations.

Once you click the "Save & Invite User" button, the new user is emailed an invitation which contains a link for them to confirm the account and enter their own password. The user will not be able to log into RentalVault until they confirm their account in this way, so ensure the email address you enter for them is correct.

RentalVault

Resetting a User's Password

You can change a user's existing password if you'd like. Click the "Edit" button for an existing user record:

In addition to editing existing user data, here you can also reset/change their password:

Type the new password and click the "Reset Password" button. The password change takes place immediately; the user may have to login again if they are currently logged in (the next time a screen or page they are on refreshes); they will need to use the new password on their next login attempt.

Work Orders

The Work Orders module is available to certain RentalVault plans, and will allow you to keep track of work items and tasks related to repair, maintenance and general upkeep of your properties, as well as the invoice numbers, PO numbers, important dates, and costs related to those activities.

To view the Work Orders screen, click the Work Orders menu item under the Add Ons main toolbar item:
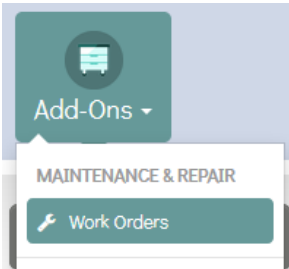
The Work Orders screen is shown:
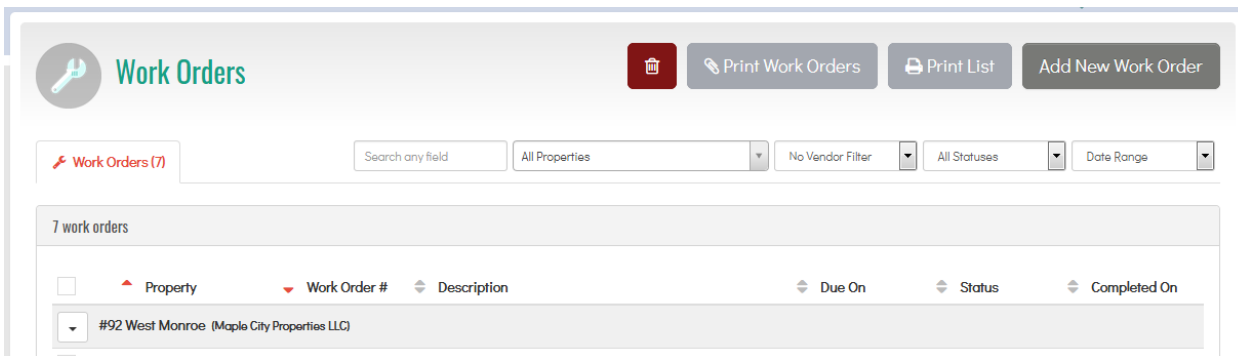
To add a new Work Order, click the "Add New Work Order" button, and the "Add New Work Order" popup screen appears:

RentalVault

Add New Work Order   ✕

🏷 General Work Order Info

Property

| #92 West Monroe ▾ |

General Description

| Repair broken window in front entrance. Also replace lock assembly on front door. |

Status	**Due Date**	**Completed Date**
To Do ▾	July 31, 2024	

Cancel   Save & Add Work Items   Quick Save

Enter the particulars of the work required for this item, including the current status (To Do, In Progress, etc) and the due date. Click the "Quick Save" button to save the Work Order immediately, or click "Save & Add Work Items" to save the record and navigate to the Work Order detail screen, where you can enter more information including individual work items.

If you chose "Quick Save" your work order is shown in the list:

☐	▲ Property	▼ Work Order #	Description	Due On	Status
▾	#92 West Monroe (Maple City Properties LLC)				
☐		00030919	Repair broken window in front entrance. Also replace lock assembly on front door.	Jul-31-2024	To Do

Note that every work order is given a unique work order #. You can use this number internally to refer to work orders; you can also communicate this work order with external contractors and vendors. You can search for this work order number (and most other fields) in the search bar at the top of the Work Orders screen, to quickly find the work order record you need.

Click an individual work order item (row) to show the details panel for it:

RentalVault

This panel will quickly show you the details of the work order, including all work items linked to it, plus any files, notes, or photos that have been uploaded and attached to it.

Clicking the "Edit Work Order" button (or selecting the "Save & Add Work Items" button when you first created the new work order) will take you to the Edit Work Order page – shown below:

RentalVault

Here you can modify the general information for the work order, as well as upload files & photos, and add notes & comments. It is also on this screen that you can individual work items, which are more fine-grained task items that you can track separately, assign to vendors, and manage costs for.

Work Items

▲ Item #	⇕ Type	⇕ Summary	⇕ PO #	⇕ Vendor	⇕ Vendor's Invoice #	⇕ Estimate
0001	Repair	Repair broken window. Asked Mark to come out and fix. He said it should take about 1 hour and he'll here at 10 AM.	3882218	Mark's General Contracting 993-901-3891 mark@repaircoinc.com	4510-192	685.00

Click the "Add Work Item" button to add a new work item – the screen appears:

Add Work Item   ✕

🏷 **Details**

Type of Work
Replace ▾

Work Summary
Replace lock assembly, front door

PO #

Vendor ▾

Vendor's Invoice #

Cost Estimate

Cost Actual

Tax

Work Item Comments

Select the 'type' of work (Repair, replace, maintain, etc) and enter a summary of the work involved. Select the vendor that will do the estimate and/or perform the work. If you need to add a new Vendor, do so beforehand from the Vendors menu, shown on the right.

If you have a PO number for the vendor, enter it here. If you have already received an estimate for the work, you can enter the cost estimate.

If the work has been performed, you can come back later and enter cost actuals, as well as an invoice number from the vendor.

Click Save to save the work item.

Add-Ons ▾

MAINTENANCE & REPAIR
🔧 Work Orders

ACCOUNTING
⌃ Income
⌄ Expenses
⌄ Manage Account Codes

VENDORS
🔧 Manage Vendors
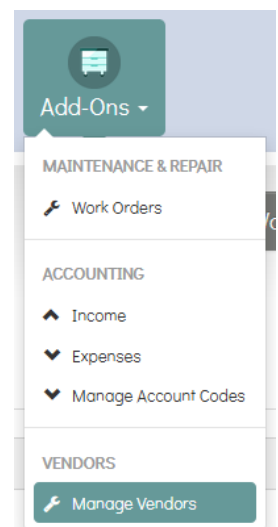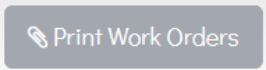
RentalVault

Once all work items have been performed you can come back to the Work Order record in general and change its status (eg., from To Do → In Progress → Completed) and enter the Completed Date.

Printing Work Order Detail Sheets

Use the [✎ Print Work Orders] button to print detail reports for the selected work orders (either all, or by selecting individual work order check boxes on the left side of the list).
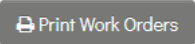
The "Generate & Print Work Orders" popup screen appears:

Generate & Print Work Orders ✕

▼ Filters

- All Properties
- Selected Work Orders Only
- Any Date Range
- All Statuses
- No Vendor Filter

Cancel   🖨 Print Work Orders

Click "Print Work Orders" and the work order detail reports appear:

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Just like any other report in RentalVault, these reports can be printed, exported to PDF, or emailed to an email address of your choice.

Printing Work Order Lists

You can also generate work order list reports, showing a summary of all work orders for the selected units, date range, or other filters. Filter the work order list screen to show the work orders you want on the report, and click the "Print List" button:
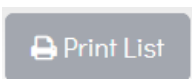
RentalVault
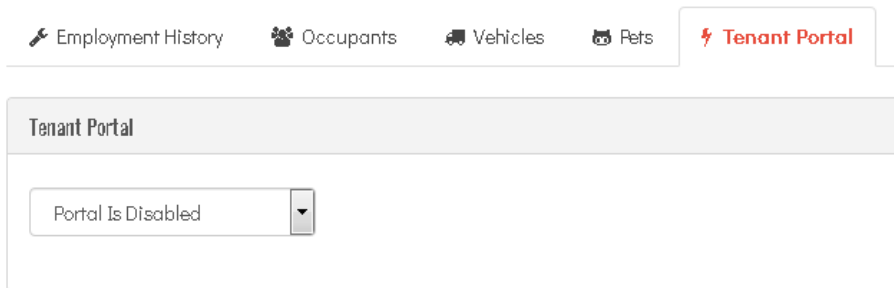
Tenant Portal

The RentalVault Tenant Portal allows your tenants to log in securely and view their payment history, print or download receipts for payments, submit work order requests, download files & documents, and make ACH (bank-to-bank) payments directly to you.

Granting Tenant Portal Access

The first step is setting up your tenant portal is to grant access to a tenant. To do so, open the tenant details page for the tenant you wish to have portal access.

Note: in order for you to grant a tenant portal access, the tenant must be invited by you, via email. As such, you should have saved an email address for the tenant.

On the Tenant Details page, click the Tenant Portal tab:
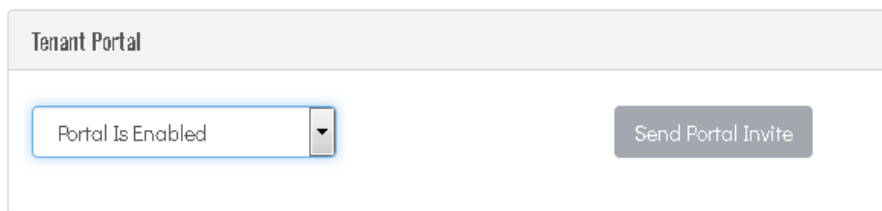
Select "Portal Is Enabled" to turn on portal access and display the Send Portal Invite button:
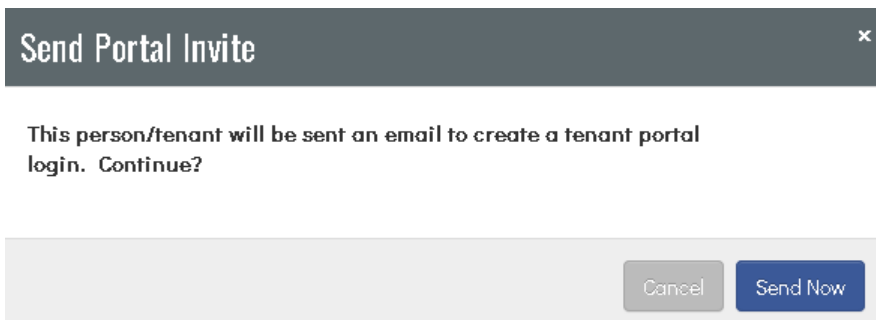
Make sure the tenant has a saved email address and click the Send Portal Invite button - the confirmation popup appears:

Click Send Now, and an email will be sent to the tenant to confirm tenant portal access.

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The tenant will need to click the link in the email to confirm their email address and choose a password.
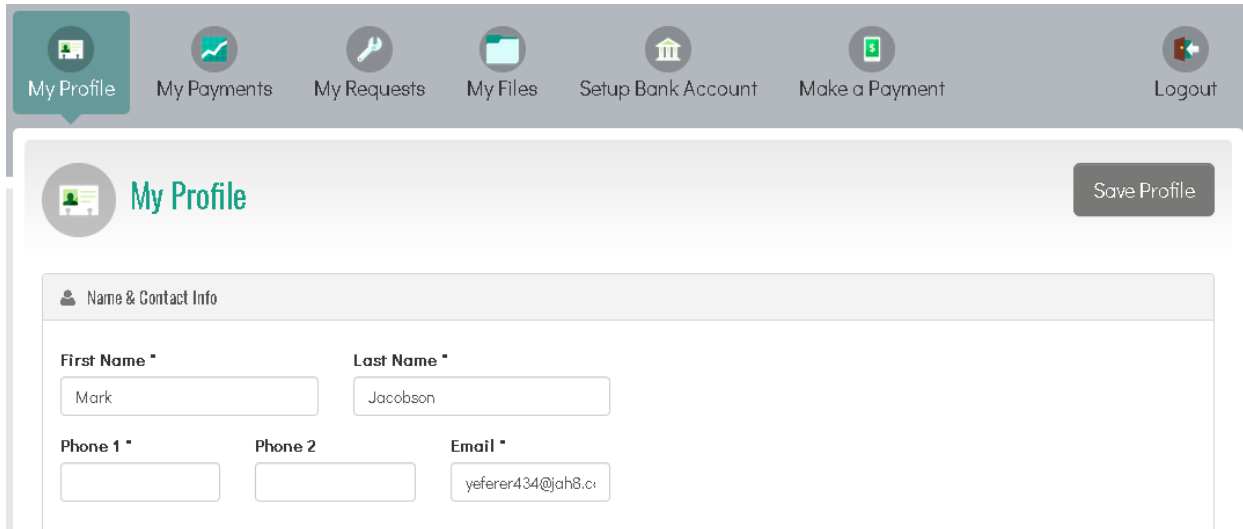
Once the tenant confirms their email address and a password is selected, the tenant can log into the portal.

Tenant Portal Features

On the portal, tenants can update their profile/contact info, view their payment history and print receipts, submit work order requests, download files, and setup their bank account and make e-payments.

Update Portal Profile

A tenant can make changes to his/her first/last name, email address, and phone numbers. When this information is saved, it is updated on your end in the main RentalVault system, on the Tenant Details page for that tenant.

View Payment History

Tenants can click the My Payments toolbar icon of the portal to see a list of their completed/posted payments:

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My Payments

Payment History

Property	Date Paid	Check/Ref #	Type	Amount Paid	Received From	Download Receipt
1093 Smith Valley	Oct-30-2020	E2930232	Rent	1,900.00	Mark Jacobson	📄
1093 Smith Valley	Jul-2-2020	E239023	Rent	1,900.00	Mark Jacobson	📄

Receipts in PDF format can be downloaded here by clicking the icon for the appropriate payment.

Maple City Properties LLC   **Receipt for Payment**
Suite 92, 1490 117 West Monroe   November 2, 2020
Chicago Illinois 66066
stevemoores@gmail.com

Mark Jacobson   yeferer434@jah8.com
1093 Smith Valley Chicago Illinois 60660
1093 Smith Valley

DATE OF PAYMENT	DUE DATE	CHECK/REF #	TYPE/DESCR	AMOUNT PAID
Oct 30, 2020	Apr 11, 2020	E2930232	Rent	1900.00
			TOTAL	1,900.00

Comments
Receipt generated by tenant

Work Order Requests

Tenants can make work order requests from the My Requests tab:

My Requests   Req

Work Order Requests

Property	Work Order #	Description	Due On	Status
You haven't submitted any work order requests.				

Click the 'Request Repairs or Maintenance' button to start a request:

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When a work order request is submitted, the work order will appear in your work order list, with an icon indicating that it was initiated by a tenant:
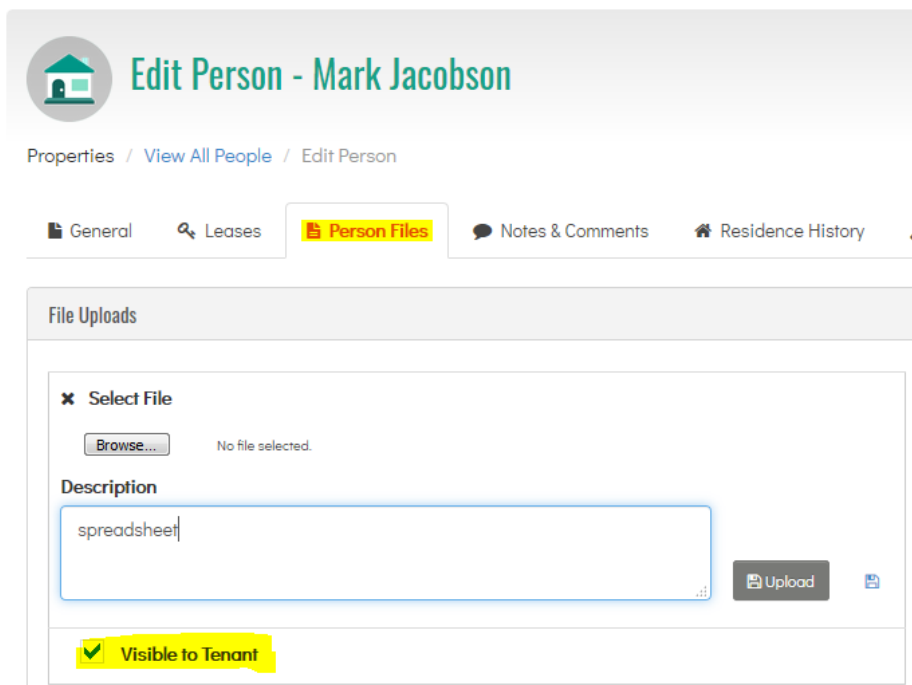

My Files

Tenants can download, view and print files that you have designated for viewing on the portal:

RentalVault
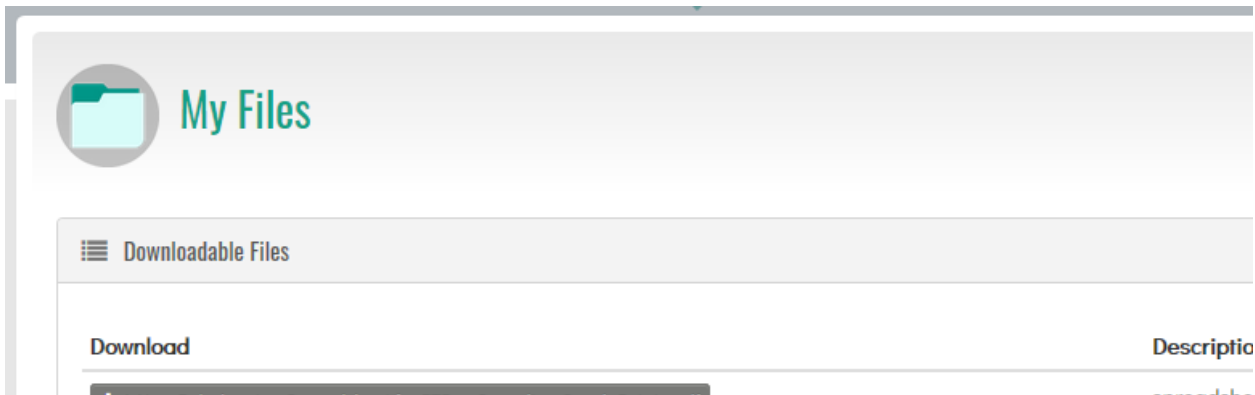
You can designate which files are visible to the tenant on the portal by toggling the "Visible to Tenant" checkbox on the Person Files tab of the Tenant Details screen for that tenant:

Setup Bank Account

In order for tenants to submit online ACH payments to you, they need to set up their bank account information. This tenant portal tab allows tenants to securely add their bank account details without having to submit those details to their landlord or property manager directly.

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Make a Payment

Tenants can make a payment to you directly (once ACH services are approved and set up) through this tab - they enter the particulars of their payment, and e-sign the payment awknowledgement form:

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More information about ACH payments is available in the Electronic (ACH) Payments section.

Electronic (ACH) Payments

RentalVault will enable you to receive tenant payments from their bank account to yours electronically. Payments take 2-3 business days to clear, and tenants receive receipts at the time of payment.

The ACH module is available at no additional monthly cost for certain RentalVault plans. Costs for transactional fees including per payment charges, declined payments/insufficient funds, etc are extra.

The ACH modules require you to be approved, and you must complete an application to do so.

ACH Payments Approval

Either download the Application for Payments Services or contact us to have the PDF application emailed to you. Fill it out completely and email it back to our compliance team for approval. Approvals take 2-3 business days:

Once you are approved for ACH services, you will receive your ACH RentalVault credentials - these can be entered into the Online Payments Setup screen:

RentalVault
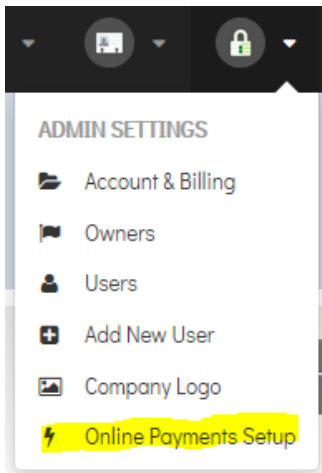
Click Add Credentials and enter the ACH Username and Password assigned to when your ACH Service account was set up (this will be emailed to on approval). Click Save and your ACH services are enabled. You should then start enabling access to the tenant portal to each tenant you want to receive payments from.