



# Settings Guide

RealPage, Inc.

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This settings guide includes page images from RealPage WelcomeHome as they would be viewed by the resident. You are directed from these images of the WelcomeHome pages to the setup pages and options where you customize and maintain the look and information you want to appear on the WelcomeHome pages.

Please note that setup options are found in diverse areas of the RealPage products. Some settings are in Leasing & Rents, some in CrossFire, and some are in Facilities. This settings guide is meant to direct you to the appropriate areas and settings that allow you to control the appearance and behavior of your WelcomeHome site.

If you cannot find the information you need in this guide, please contact Welcome Home Implementation Team.

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## Prerequisites

In addition to the WelcomeHome product center, the following centers will need to be enabled for a full implementation of all WelcomeHome features:

- Concierge
- Crossfire Residents
- Crossfire Online Renewals
- Crossfire Service Requests
- Document Management
- Facilities
- Leasing & Rents
- Payments 3.x
- Property

## Roles and Rights

You will need the role of Content Viewer to be able to change some WelcomeHome settings. If you do not have that role, assign the right of **View property web site data** to your existing role so that you can edit WelcomeHome settings.

**SIGN-ON page**

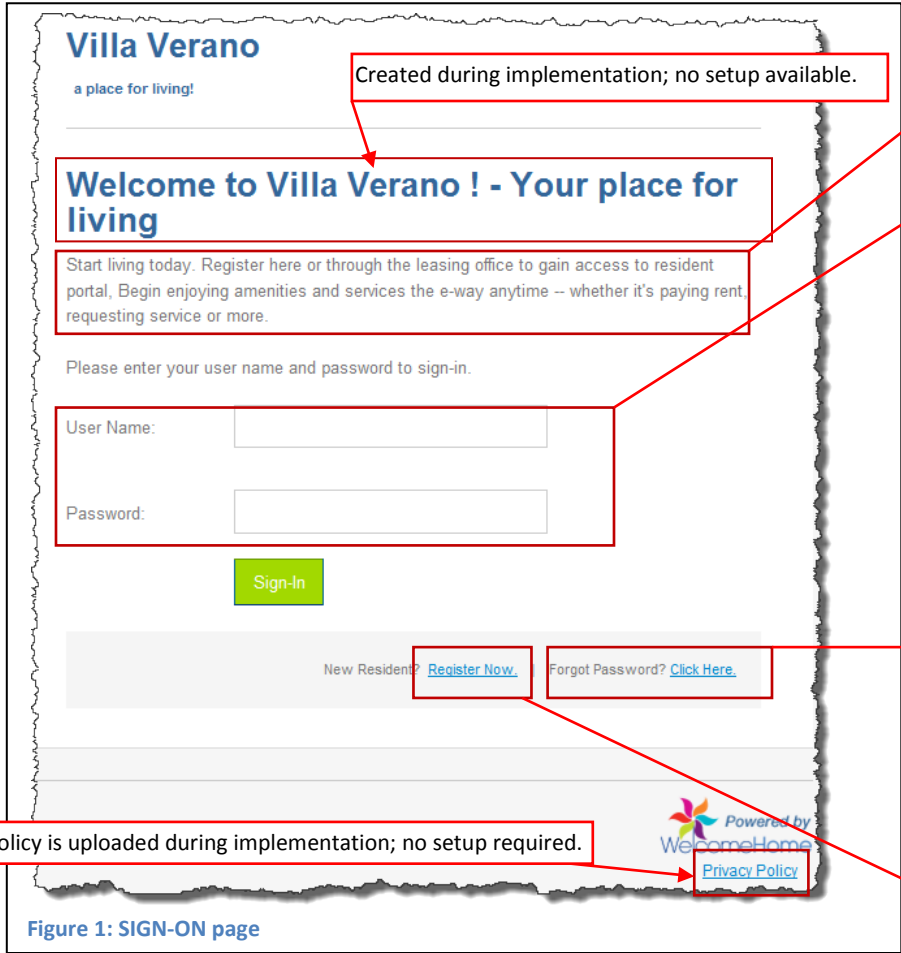


Figure 1: SIGN-ON page

The WelcomeHome **SIGN-ON** page greeting can be customized. The **SIGN-ON** page asks residents to register if they don't have a user name, and provides a link if they have forgotten their password. WelcomeHome users (residents, applicants, past residents) can access features you give them permission to access on their **Resident profile** tab. The setup options for the **SIGN-ON** page are found in the following areas:

Page Element	Setup Information
Greeting	<b>CrossFire → Portal sign-on requirements → Login page</b> The greeting is set up on the <b>Portal sign-on requirements</b> page in the <b>Login page</b> text field.
User Name, Password	<b>OneSite → Residents → Contact → Edit → Resident profile</b> For residents who walk into the leasing office, you can set up user names and passwords in Leasing & Rents on the <b>Resident profile</b> tab. Residents are notified by e-mail of the user name/password you set up for them. WelcomeHome users can change their password from <b>WelcomeHome-My Profile</b> page. Applicants and residents can also create their own user name/password at the end of an Online Leasing application, and just by accessing the WelcomeHome site. The user name/password is set up automatically by the system. As long as an individual is associated with a specific unit at the property, the individual can have a user name/password for WelcomeHome. You can cancel their access on their <b>Resident profile</b> tab by selecting the features they can access on WelcomeHome.
Forgotten Password	<b>CrossFire → Portal users → Find resident → Reset password</b> —OR— <b>Leasing &amp; Rents → Residents → Resident profile → Reset password</b> When a resident clicks <b>Click here</b> , they are asked for their e-mail address. After they enter it, a message says they'll be receiving a new, temporary password at that e-mail address in a few moments. You can also change the residents' passwords for them from the <b>Resident profile</b> tab on the <b>Resident at a glance</b> page, or through the Portal users page in CrossFire.
Register Now	<b>CrossFire → Portal sign-on requirements → Terms &amp; conditions</b> The first time residents access WelcomeHome, they must click the <b>Register</b> button to open a page where they can create a user name. You receive e-mail notification of their registration at the e-mail address you set up in the <b>Office e-mail</b> field on the <b>Portal content</b> page of CrossFire. You receive e-mail notification of their registration so that you can go into their <b>Resident profile</b> tab and grant them access to WelcomeHome features.

## DASHBOARD page

The screenshot shows the following sections on the dashboard:

- Logo:** Villa Verano Apartment Homes
- Notification Center:** Contains messages such as "YOUR APARTMENT SET-UP IS COMPLETE!", "THANK YOU FOR RENEWING YOUR LEASE ONLINE.", and service request completion notices.
- Account Snapshot:** Shows "Current Amount Due" as (\$950.00) and "Past Due" as (\$950.00). Includes buttons for "Make a Payment" and "Recurring Payment Set-up".
- Build Your Profile:** Shows a progress bar at 100% completion. Lists categories like "Payment Accounts", "Recurring Payments", "Vehicles", and "Emergency Contact".
- Community Calendar:** Displays a calendar for April 2013 with an event titled "Puppets for pre-teens - every Monday".
- Service Requests:** Includes a "Submit a Service Request" button and a link to "Previous Service Requests".

Figure 2: DASHBOARD page

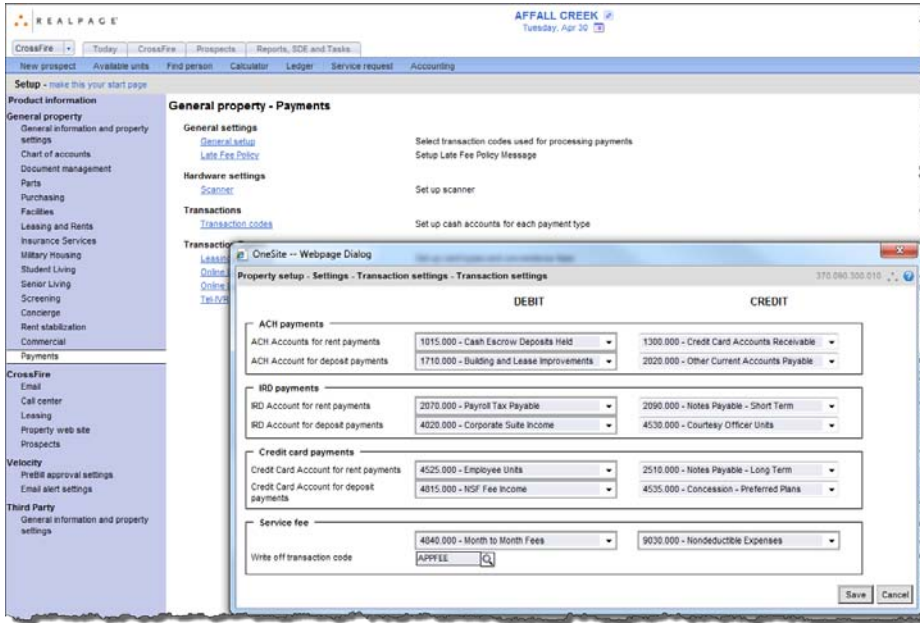
When residents sign on to WelcomeHome, the **DASHBOARD** page opens. All the information displayed on the **DASHBOARD** page is setup for other WelcomeHome pages, as follows:

Page Element	Source of information in WelcomeHome:
Logo	<b>CrossFire</b> → <b>Web site setup</b> → <b>Home page</b> → <b>Logo</b> Your property logo is set up on the <b>Home page</b> page of web site setup, in the <b>Logo</b> field.
Notification Center and Dashboard page	All the information on the <b>DASHBOARD</b> page comes from other WelcomeHome pages and setup options. The <i>Notification Center</i> presents residents with the most current information about their apartment. This information changes dynamically.
Account Snapshot	The information displayed in the <i>Account Snapshot</i> comes from the <b>Payments</b> tab of the <b>MY APARTMENT</b> page. Setup information for the <b>MY APARTMENT</b> page is on page 7.
Build Your Profile	The information displayed in <i>Build Your Profile</i> comes from the <b>MY PROFILE</b> page. Setup information for the <b>MY APARTMENT</b> page is on page 25. The “nn% complete” changes as the resident adds a payment account, sets up recurring payments, adds emergency contact information, adds vehicles and so forth, until it reaches 100%. Until the profile is complete, this area provides links to items that remain to be completed on the <b>MY PROFILE</b> page.
Community Calendar	The information in the <i>Community Calendar</i> comes from the <b>EVENTS</b> page. Setup information for the <b>EVENTS</b> page is on page 29. Residents can page through events or view the details of a specific event from this snapshot on the <b>DASHBOARD</b> .
Service Requests	This information comes from the <b>Service requests</b> tab of the <b>MY APARTMENT</b> page. Setup information for the <b>MY APARTMENT</b> page is on page 14.

## OneSite Payments Settings for WelcomeHome

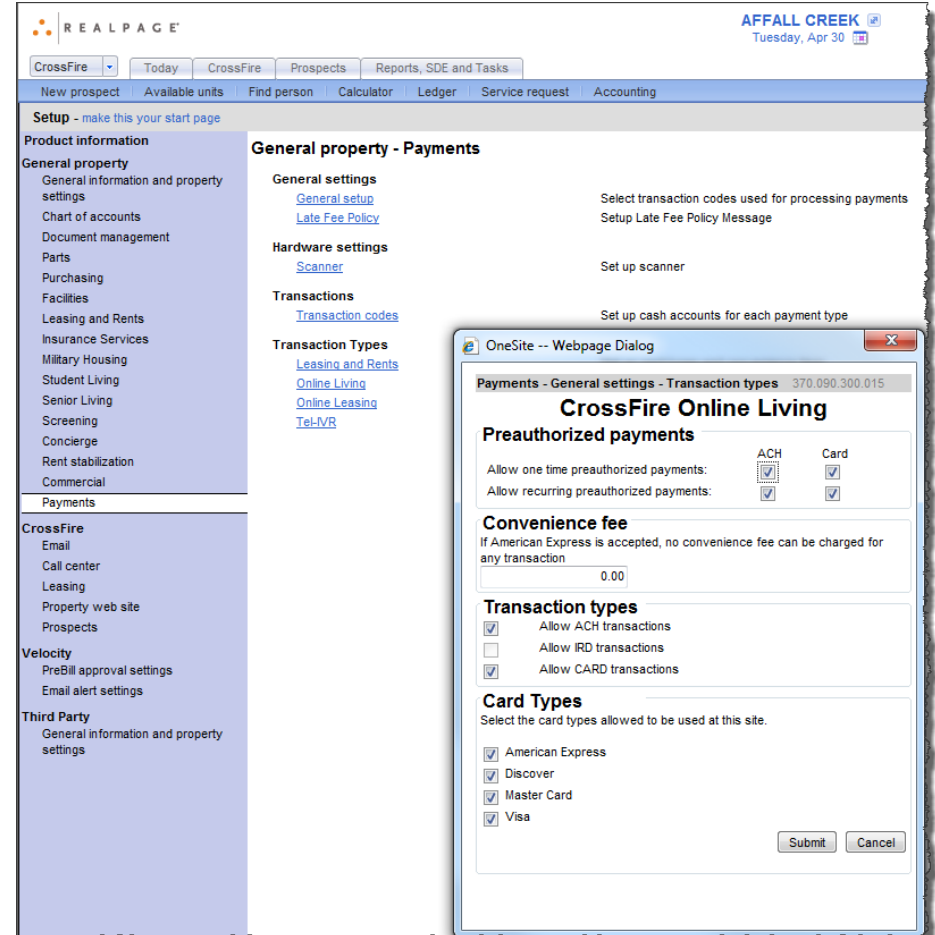
The next section of WelcomeHome requires **OneSite Payments**. The settings you configure include the fees you can charge and the types of payments (cash, checks, money orders, credit cards, debit cards) that residents can make through WelcomeHome. In Payments, these options are configured on the **General property – Setup** page, as follows:

### OneSite → Setup → Payments → Transaction codes



Settings that Must be Configured for Payments BEFORE Setting Up Payments for WelcomeHome

### OneSite → Setup → Payments → Online Living



Settings that Must be Configured for Payments BEFORE Setting Up Payments for WelcomeHome

After **Payments** is configured, you must then setup the CrossFire online payment options, explained below.

**MY APARTMENT → PAYMENTS → Account History**

Note: The Payments product center must be set up for WelcomeHome to allow payments through the portal. The settings shown on the prior page must be configured prior to the settings explained below.

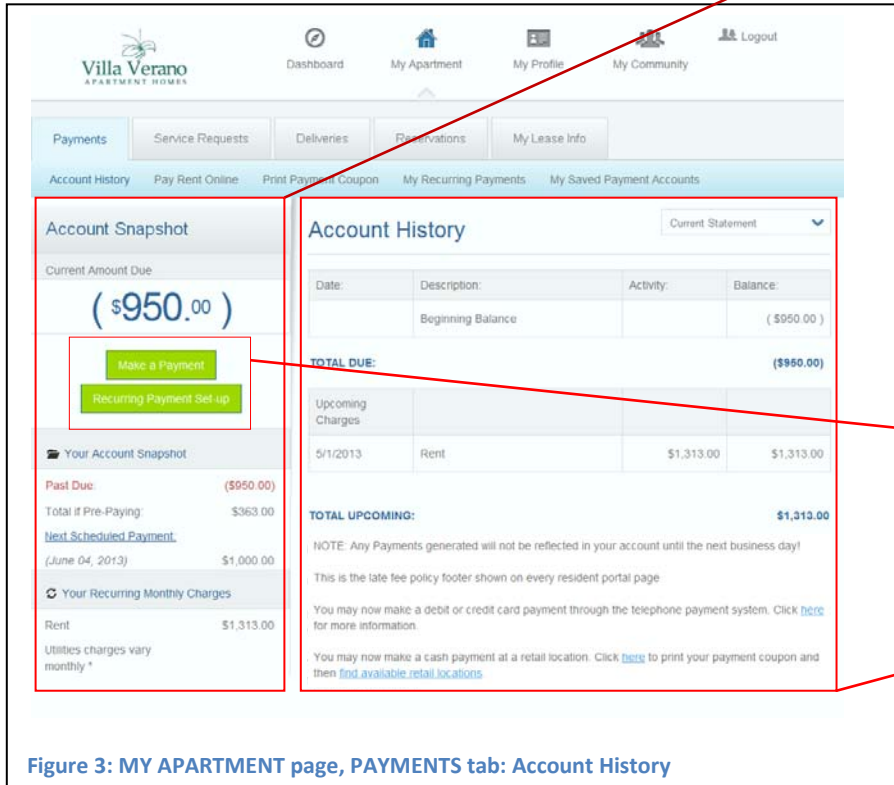


Figure 3: MY APARTMENT page, PAYMENTS tab: Account History

The **MY APARTMENT** page has, potentially, five tabs. The number of tabs that appear for a given WelcomeHome user depends on whether the user has been granted permission to use online payments on their **Resident profile** tab. There are setup options for each **MY APARTMENT** tab and sub-tab.

The **Payments** tab can have five sub-tabs: **Account History**, **Pay Rent Online**, **Rent Payment Coupon**, **My Recurring Payments**, and **My Saved Payment Accounts**. Each tab displays the *Account Snapshot* shown above on the left. The **Account History** sub-tab has two main sections, as follows:

Page Element	Setup Information
Account snapshot	<p><b>CrossFire → Online rent payment settings</b></p> <p>You set up online rent payment for WelcomeHome on the <b>General</b> tab of the <b>Online rent payment settings</b> page of CrossFire through the following options:</p> <ul style="list-style-type: none"> <li>• Allow partial payments for current residents</li> <li>• Allow partial payments for former residents</li> <li>• All former residents*</li> <li>• Display upcoming &amp; SDE charges</li> <li>• Display SDE charges as upcoming</li> <li>• Current amount due (includes any past due)</li> <li>• Past due only</li> <li>• Current + pre-pay upcoming</li> </ul> <p>* It is good practice to allow former residents to make payments through the portal.</p> <p>You must also define recurring payment options for residents on the <b>Recurring payments</b> tab of the <b>Online rent payment settings</b> page of CrossFire through the following options:</p> <ul style="list-style-type: none"> <li>• Fixed amount</li> <li>• Total amount (not to exceed)</li> <li>• Current balance</li> </ul>
Make a payment, Recurring payment setup buttons	<p><b>OneSite → Residents → Contact → Edit → Resident profile</b></p> <p>Residents must have permission, on their <b>Resident profile</b> tab, to make online rent payments in order for these buttons to appear, and for all of the <b>Payments</b> sub-tabs to appear.</p>
Account History	<p>The <i>Account History</i> section shows residents how much they have paid to date and how the payments have been applied to their balance. Setup for what residents see in this section is done through the setup options for Payments and the options explained above for the <i>Account Snapshot</i>.</p> <p>Note: It is good practice to tell residents to sign out of WelcomeHome, wait ten minutes, and then sign on again to see recently submitted payments reflected in their account history.</p>



MY APARTMENT → PAYMENTS → Pay Rent Online

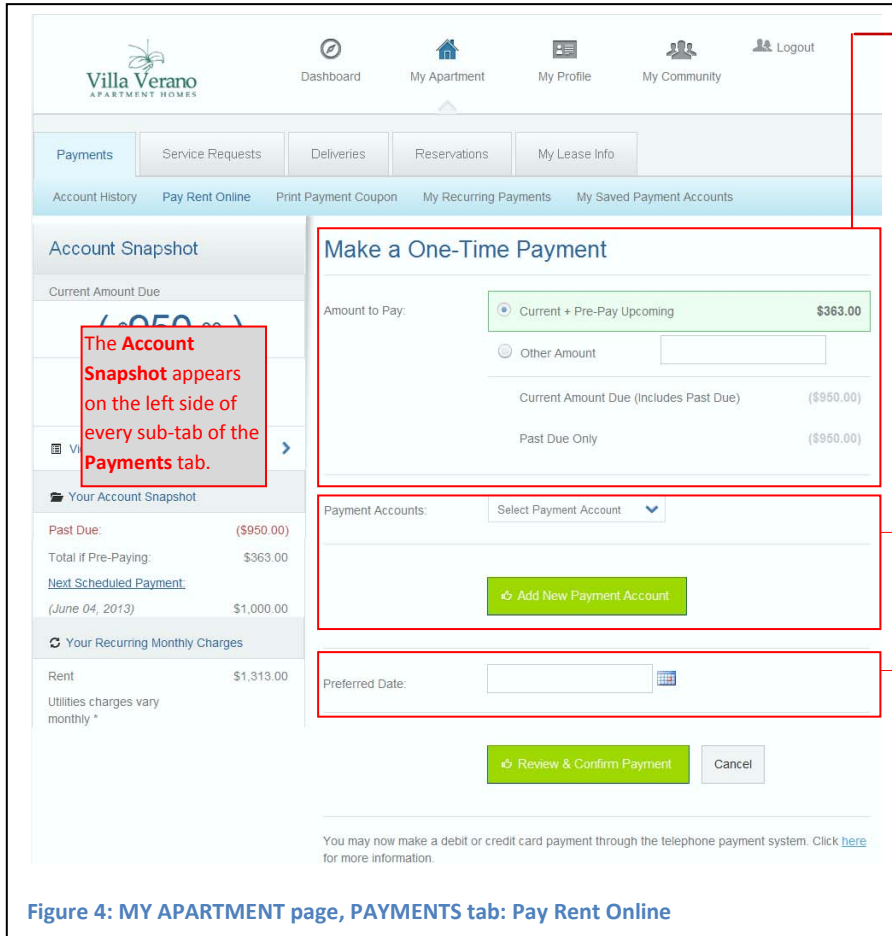


Figure 4: MY APARTMENT page, PAYMENTS tab: Pay Rent Online

The types of one-time payments a resident can make are defined by the Payments settings (described on the preceding page) and by CrossFire **Online rent payment settings**, as follows:

Page Element	Setup Information
Make a One-Time Payment	<p><b>CrossFire → Online rent payment settings</b></p> <p>The ways in which a resident can pay rent are defined in the <b>Payments</b> setup options (see page 8) and in CrossFire on the <b>General</b> tab of the <b>Online rent payment settings</b> page through the following options:</p> <ul style="list-style-type: none"> <li>• Allow partial payments for current residents</li> <li>• Allow partial payments for former residents</li> <li>• All former residents*</li> <li>• Display upcoming &amp; SDE charges</li> <li>• Display SDE charges as upcoming</li> <li>• Current amount due (includes any past due)</li> <li>• Past due only</li> <li>• Current + pre-pay upcoming</li> </ul> <p>*It is good practice to allow former residents to make payments through the portal.</p> <p>You must also define recurring payment options for residents on the <b>Recurring payments</b> tab of the <b>Online rent payment settings</b> page of CrossFire through the following options:</p> <ul style="list-style-type: none"> <li>• Fixed amount</li> <li>• Total amount (not to exceed)</li> <li>• Current balance</li> </ul>
Make a One-Time Payment	<p><b>OneSite → Residents → Contact → Edit → Resident profile</b></p> <p>Residents must have permission to make online rent payments on their <b>Resident profile</b> tab.</p>
Payment Accounts	<p>The payment types and accounts a WelcomeHome user can setup and use depend on the setup options configured for <b>OneSite Payments</b> (see page 8) and on the CrossFire <b>Online rent payment settings</b>.</p>
Preferred Date	<p>For a WelcomeHome user to be able to pre-pay an amount, the CrossFire <b>Online rent payment settings</b> must have the <b>Current +pre-pay amount</b> option enabled.</p>

**MY APARTMENT → PAYMENTS → Print Payment Coupon**

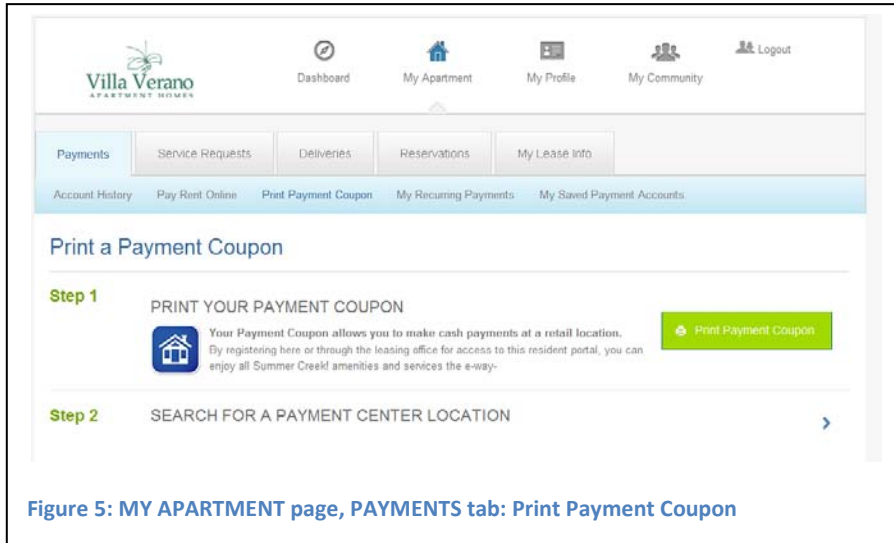


Figure 5: MY APARTMENT page, PAYMENTS tab: Print Payment Coupon

**Setup Information**

**Setup → Payments → Transaction Types – Online living  
—AND—  
CrossFire → Online rent payment settings**

All information displayed and entered on the **Print payment coupon** sub-tab of the **Payments** tab of WelcomeHome is set up through the options and explanations on page 8.

If your property uses the **eMoney Order** program or the **Tel-IVR Program**, residents will be able to print payment coupons and locate a payment center through the **Print Payment Coupon** sub-tab of the **Payments** tab on the **MY APARTMENT** page of WelcomeHome.

MY APARTMENT → PAYMENTS → My Recurring Payments

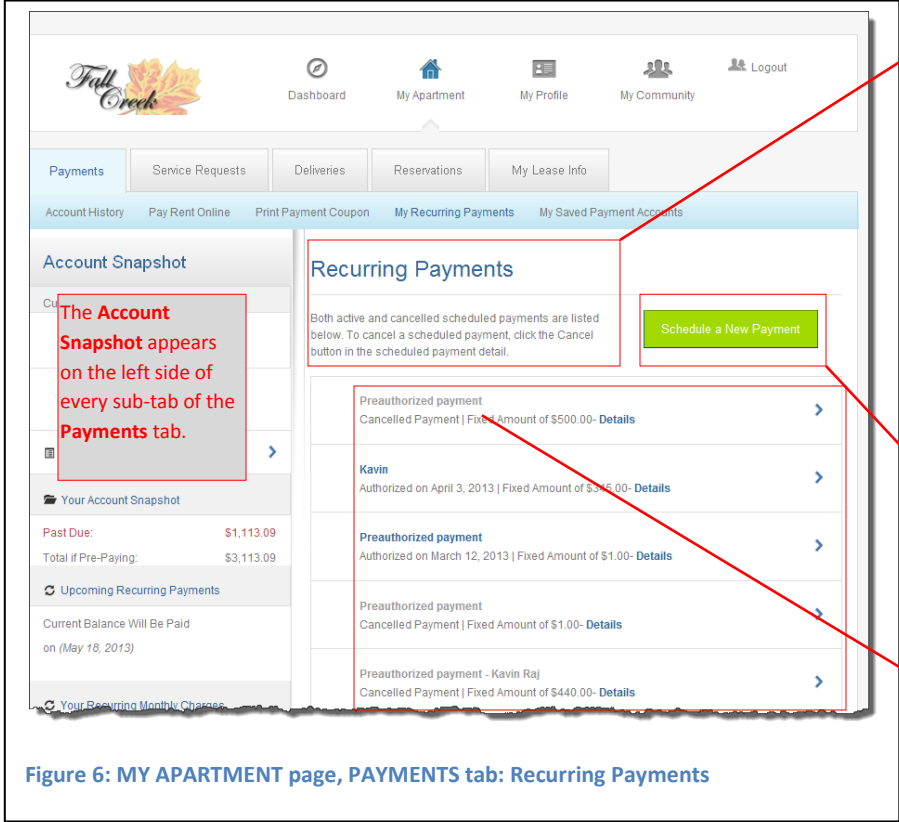


Figure 6: MY APARTMENT page, PAYMENTS tab: Recurring Payments

Page Element	Setup Information
Recurring payments	<p><b>CrossFire → Resident portal setup → Online rent payment settings → Recurring payments</b></p> <p>The <b>Recurring Payments</b> page lists the resident’s recurring payments and allows the resident to set up, manage, and review those payments. Residents can set up recurring payments which are paid on an automated schedule. Or, they can enter one-time payments.</p> <p>The types of payments that can be made by WelcomeHome user are determined by the settings in OneSite <b>Payments</b> and the following options on the <b>Recurring payments</b> tab of the <b>Online rent payment settings</b> page in CrossFire:</p> <ul style="list-style-type: none"> <li>• Fixed amount</li> <li>• Total amount (not to exceed)</li> <li>• Current balance</li> </ul>
Schedule a New Payment	<p><b>CrossFire → Resident portal setup → Online rent payment settings → General</b></p> <p>See page 12 for the list of setup options that govern scheduling payments.</p>
Preauthorized payment	<p><b>CrossFire → Resident portal setup → Online rent payment settings → General</b></p> <p>See page 12 for the list of setup options that govern preauthorized payments.</p>

**MY APARTMENT → PAYMENTS → My Saved Payment Accounts**

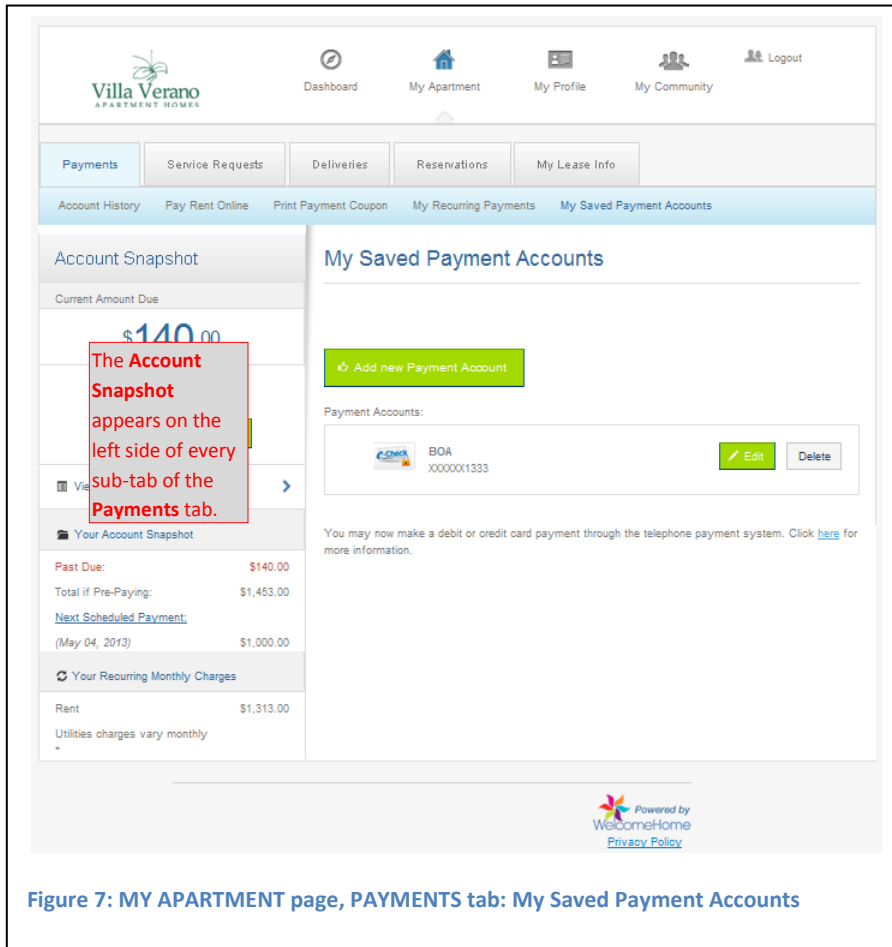


Figure 7: MY APARTMENT page, PAYMENTS tab: My Saved Payment Accounts

The **My Saved Payment Accounts** tab lists the resident’s payment accounts and allows the resident to set up and manage those accounts. Residents must set up one or more payment accounts before they can make online payments. The type of online accounts a resident can set up are defined through **OneSite Payments** and CrossFire.

Setup Information

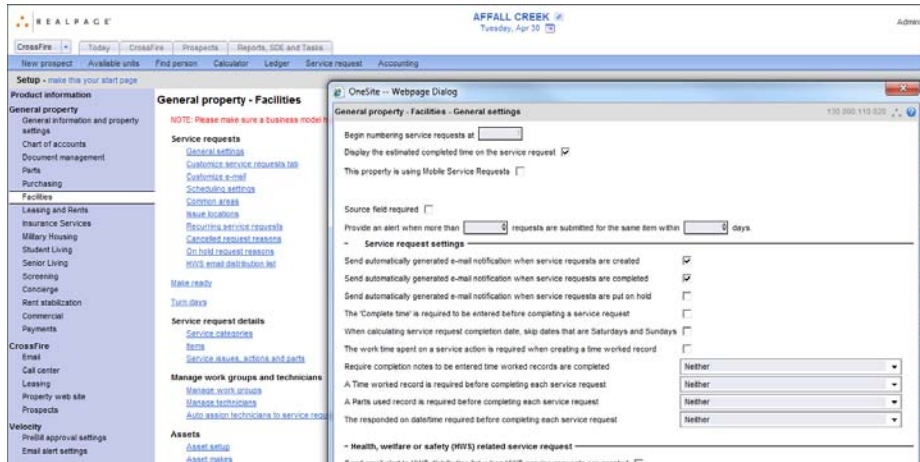
**Setup → Payments → Transaction Types – Online living**  
**—AND—**  
**CrossFire → Online rent payment settings**

All information displayed and entered on the **My saved payment** sub-tab or the **Payments** tab of WelcomeHome are set up through the options and explanations on page 8.

## OneSite Facilities Setting for WelcomeHome

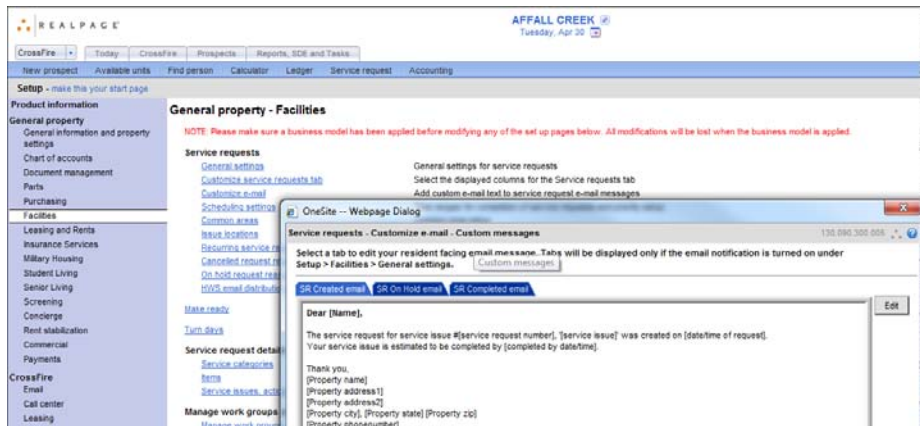
If you allow residents to enter their own service requests from WelcomeHome, then you will need to check that the following settings are configured appropriately for OneSite Facilities.

### OneSite → Setup → Facilities → General Settings



### Settings to Configure for Facilities BEFORE Setting Up Service Requests for WelcomeHome

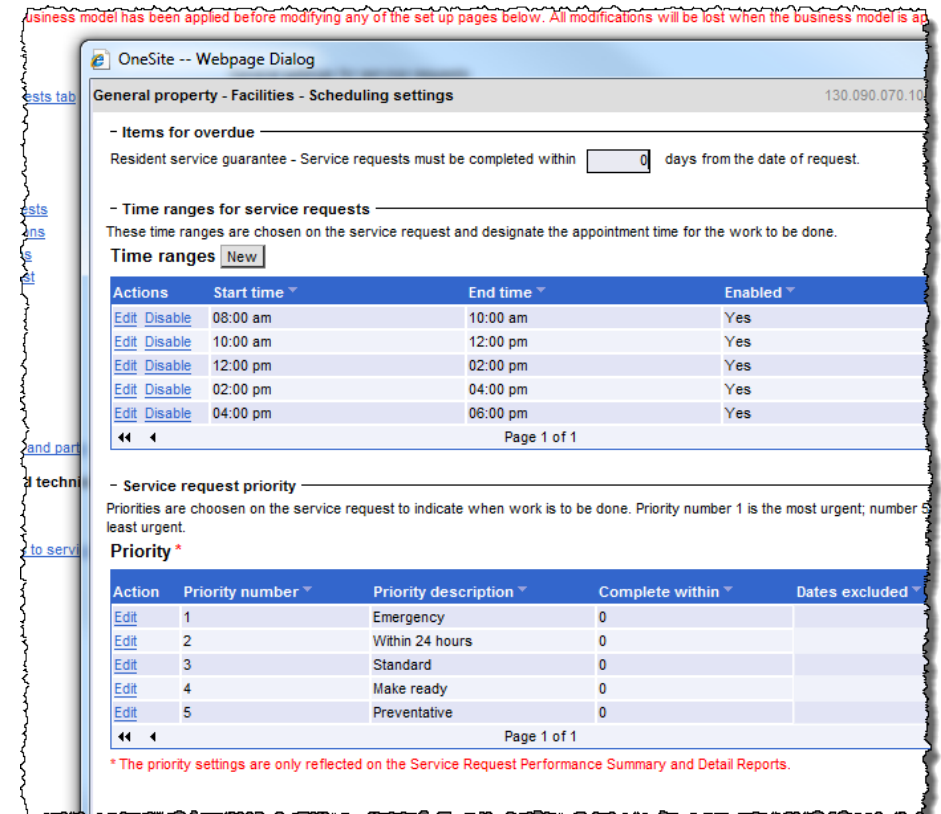
### OneSite → Setup → Facilities → Customize e-mail



### Settings to Configure for Facilities BEFORE Setting Up Service Requests for WelcomeHome

If you will be allowing residents to schedule service appointment times, you will also need to configure **Schedule settings** in Facilities:

### OneSite → Setup → Facilities → Schedule settings



### Settings to Configure for Facilities BEFORE Setting Up Service Requests for WelcomeHome

Once Facilities is set up appropriately, you must configure the **Online service request settings** in CrossFire as explained on page 14.

**MY APARTMENT → SERVICE REQUESTS → Current Service Requests**

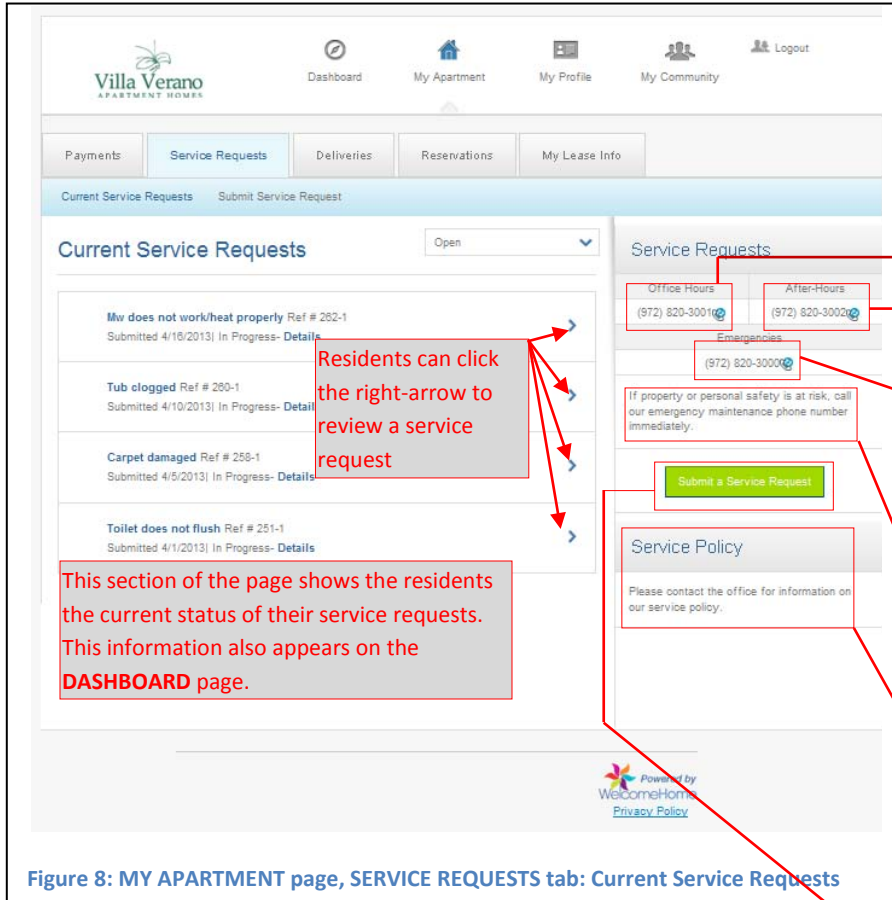


Figure 8: MY APARTMENT page, SERVICE REQUESTS tab: Current Service Requests

The WelcomeHome **Service Requests** tab is available if your property uses the Facilities and CrossFire Service Requests product centers. On this page, residents can see information about their service requests on the left side of the page and information about entering a new service request on the right side of the page.

There is no setup required for what appears on the left side of the page. The information on the right side of the page is set up in CrossFire.

Page Element	Setup Information
Service Requests	<b>CrossFire → Online service request settings</b> To make service requests available to residents, select <b>Online service request settings</b> from CrossFire. There are several options to configure on the <b>Online service request settings</b> page, all of which are self-explanatory. The settings correspond to the elements on the <b>Current Service Request</b> sub-tab of the <b>Service Requests</b> tab of the <b>MY APARTMENT</b> page as follows:
Office Hours	The <b>Display office hours phone number</b> check box must be selected AND the <b>During office hours phone number</b> must be entered.
After Hours	The <b>Display after office hours phone number</b> check box must be selected, AND the <b>After office hours phone number</b> must be entered.
Emergencies	The <b>Display emergency phone number</b> check box must be selected for your property's emergency number to appear here. If you also select the <b>Display "or 911"</b> check box, then your property's emergency phone number AND 991 will appear here.
Emergencies text	<b>The emergency statement text that will appear in the Online Service request</b> field is a text box into which you can type a paragraph of instructions for your residents to read when they open a service request.
Service Policy	The property's service policy may be a long, legal document that is available on request at the leasing office, in which case you would want to refer residents to the office and that document, as has been done in this example. Alternatively, you can enter policy text directly into the text box titled <b>The service policy text that will appear in the online service request</b> .
Submit a Service Request	<b>CrossFire → Portal users → Edit → Resident profile</b> Residents must have permission to submit a service request. Make sure there is a check mark in the <b>Online service requests</b> field of the <b>Resident profile</b> tab to grant access permission.

**MY APARTMENT → SERVICE REQUESTS → Submit Service Request**

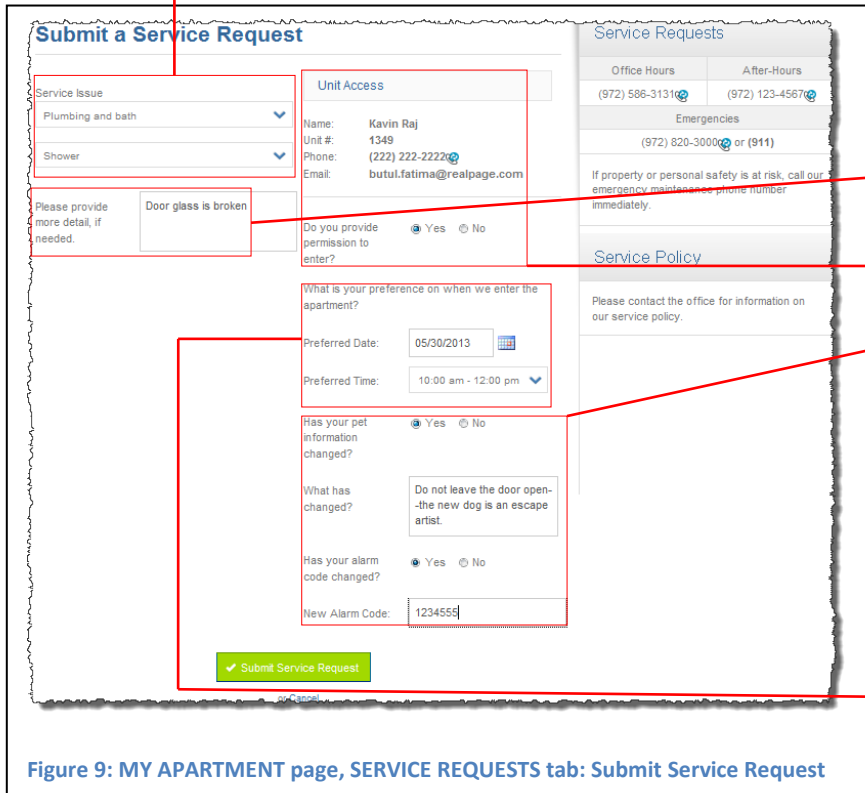


Figure 9: MY APARTMENT page, SERVICE REQUESTS tab: Submit Service Request

The elements on the **Submit a Service Request** page are set up in Facilities, Leasing & Rents, and CrossFire.

There may be information about the resident from a prior service request. If not, the resident will need to state on the service request they enter whether they give permission to service personnel to enter their residence, and if so at what time.

Page Element	Setup Information
Service Issue	<p><b>Setup → Facilities → Service Categories</b></p> <p><b>Setup → Facilities → Items</b></p> <p>The options residents can pick from as the service issue and service item are set up in Facilities.</p>
Please provide more detail, if needed	<p>Any information that residents enter here will show up as comments on the service request.</p>
Unit Access	<p><b>Leasing &amp; Rents → Residents → Contact (Edit) → Miscellaneous</b></p> <p>The unit access information is defined at the <b>Miscellaneous</b> tab of the <b>Resident at a glance</b> page.</p>
Pet Information	<p>The resident's recorded options for permission to enter, pet information, and alarm code are defined on the <b>Resident at a glance</b> page, and that information will appear on the service request. The resident has the option to change that information when entering a new service request in WelcomeHome.</p>
Alarm Code	<p>The resident's recorded options for permission to enter, pet information, and alarm code are defined on the <b>Resident at a glance</b> page, and that information will appear on the service request. The resident has the option to change that information when entering a new service request in WelcomeHome.</p>
Preferred Appointment Date and Time	<p><b>Setup → Facilities → Service requests – Scheduling settings</b></p> <p>If you want to allow residents to specify a preferred date and time for their service appointments, you must first define the appointment time ranges in Facilities.</p> <p><b>CrossFire → Online service request → Online service request settings</b></p> <p>In CrossFire, you choose whether you will allow residents to set a preferred appointment date and a preferred time.</p>

## MY APARTMENT → DELIVERIES tab

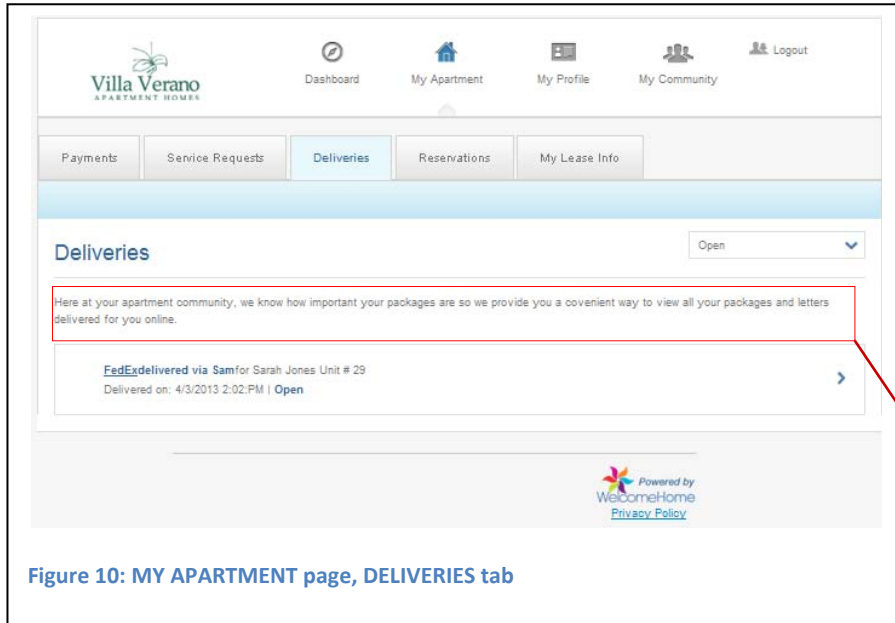
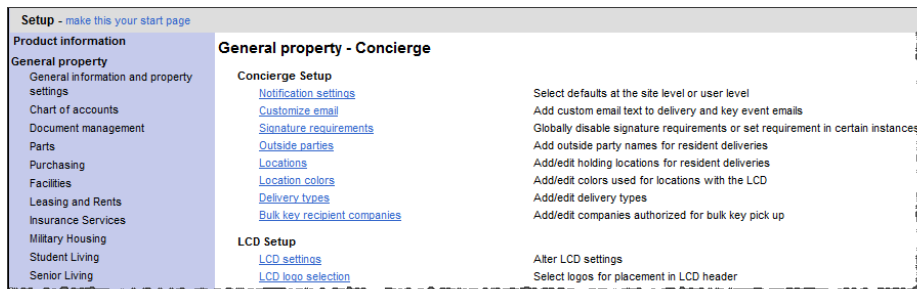


Figure 10: MY APARTMENT page, DELIVERIES tab

The **Concierge** product center must be enabled and configured for the resident portal if you offer concierge attended package delivery and pick-up, or guest admission to apartments, or guest key pick-up, or bulk key pick-up for service providers such as housekeepers. Access to these option is:

**OneSite → Setup → Concierge**



The **Deliveries** tab on the **MY APARTMENT** page of WelcomeHome is where residents will look for information about packages and other items they may have received or sent.

Page Element	Setup Information
Deliveries	<b>CrossFire → Resident portal setup → Portal content</b> For Concierge and CrossFire to be able to interface, you must select the <b>Enable concierge service online check box</b> on the <b>Portal content</b> page. (Scroll to the bottom of that page to find the Concierge settings.)
Deliveries	<b>CrossFire → Portal users → Edit → Resident profile</b> To view the <b>Deliveries</b> tab, the resident must have access permission. Make sure there is a check mark in the <b>Online concierge services for guest registrations</b> field of the <b>Resident profile</b> tab to grant access permission.
Deliveries Message	<b>CrossFire → Resident portal setup → Portal content</b> You enter the text for the deliveries message in the <i>Online concierge services</i> section of the <b>Portal content</b> page. The text is entered on the <b>Delivery</b> tab. 



## MY APARTMENT → RESERVATIONS → Overview

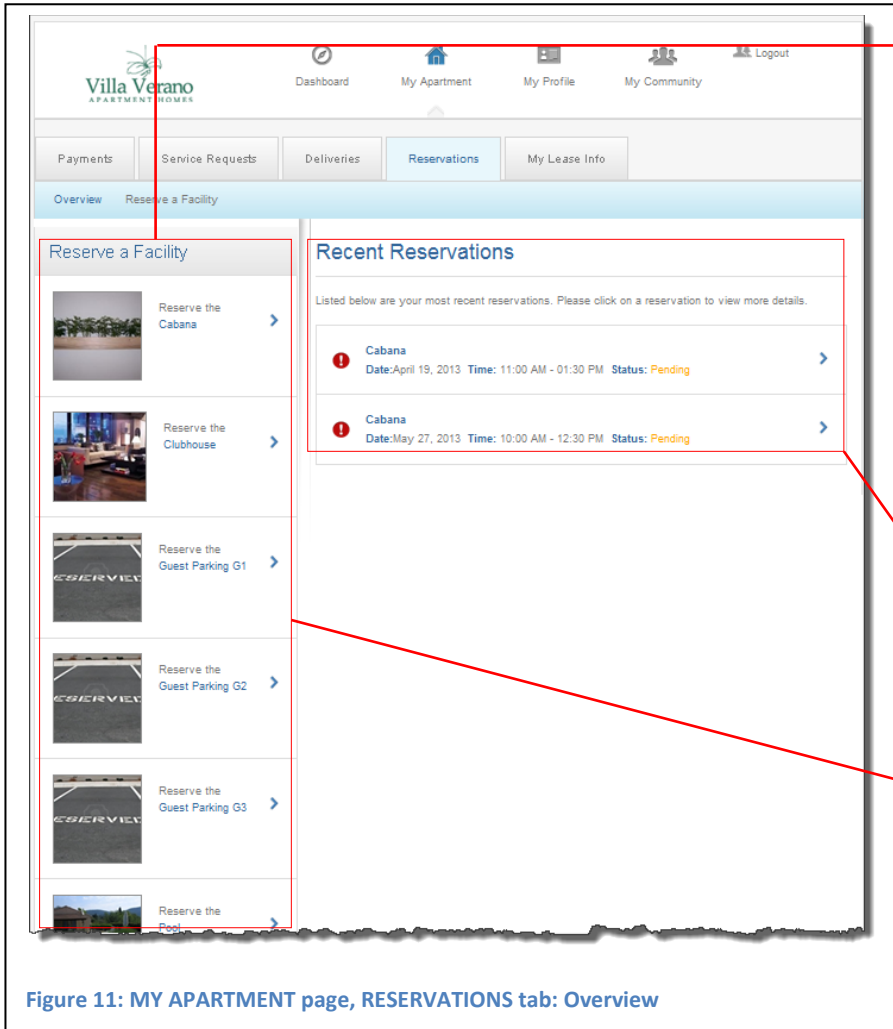


Figure 11: MY APARTMENT page, RESERVATIONS tab: Overview

Before residents can reserve amenities for personal use, you must set up the features that are reservable. When you set up reservable features, you configure fees for use, duration of the reservation, and the hours during which the amenity or feature can be reserved.

Page Element	Setup Information
Reservations	<p><b>CrossFire → Reservable feature settings</b></p> <p>For reservable items to show up in this section of WelcomeHome, you must define what those items are when you add the feature through CrossFire.</p> <ul style="list-style-type: none"> <li>Be sure to select the <b>Display feature online</b> check box so that the item appears on WelcomeHome.</li> <li>Select a picture for the item by clicking <b>Select image</b> on the <b>Add a feature</b> page.</li> </ul>
Reserve a Facility	<p><b>CrossFire → Portal users → Edit → Resident profile</b></p> <p>Residents must have access permission to reserve a facility. You set this up by making sure there is a check mark in the <b>Feature reservations</b> field on the <b>Resident profile</b> tab.</p>
Request to reserve	<p><b>CrossFire → Portal content</b></p> <p>After the resident clicks the link to the right of the item she wants to reserve, a reservation request is sent by e-mail to the leasing office. The e-mail address the notification will go to is set up on the <b>Portal content</b> page of CrossFire, in the <b>Office e-mail</b> field, shown below.</p>

MY APARTMENT → RESERVATIONS → Reserve a Facility

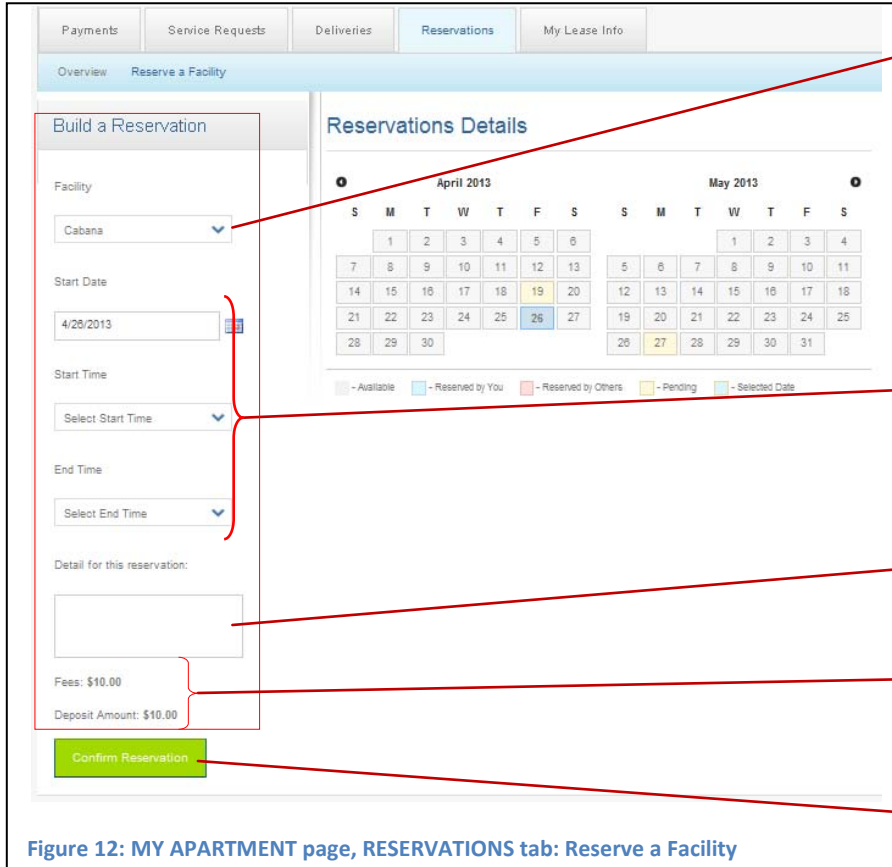


Figure 12: MY APARTMENT page, RESERVATIONS tab: Reserve a Facility

Residents enter a request to reserve a facility by completing the fields in the *Build a Reservation* section of the **Reservation** tab. The request is sent by e-mail to the address set up for the leasing office in **CrossFire → Portal content**.

Page Element	Setup Information
Name	<p><b>CrossFire → Reservable feature settings</b></p> <p>Click <b>Add</b> on the <b>Reservable feature settings</b> page to open the <b>Add a feature</b> page. Enter the name of the reservable item in the <b>Name</b> field.</p> <ul style="list-style-type: none"> <li>• Be sure to select the <b>Display feature online</b> check box so that the item appears on WelcomeHome.</li> <li>• You can select a picture for the item by clicking <b>Select image</b> on the <b>Add a feature</b> page (assuming pictures have been uploaded and are available through the Image Picker.)</li> </ul>
No reservations before/after this time	<p><b>CrossFire → Reservable feature settings</b></p> <p>Define the hours that the reservable item is available for reservation in the <i>Allow reservations overnight</i> and the <i>Hours of reservations</i> sections of in the <i>Fees</i> section of the <b>Add a feature</b> page.</p>
Detail for this reservation	No setup required for this field. Any information the resident enters here will appear on the e-mail request to reserve the item.
Rental fee (per hour) Deposit	<p><b>CrossFire → Reservable feature settings</b></p> <p>Define the hourly rental fee and the deposit for the reservable item, if any, in the <i>Fees</i> section of the <b>Add a feature</b> page.</p>
Confirm Reservation	When the resident clicks this button, an e-mail message is sent to the leasing office requesting the reservation. The request is also added to the <b>Feature reservations</b> page of CrossFire. Leasing staff must monitor the <b>Feature reservations</b> page in order to collect fees and deposits, get signed agreements, ensure that features are not double-booked, and approve and deny reservations. Once a resident's reservation is approved, the resident receives an e-mail notification confirming the reservation details.

**MY APARTMENT → MY LEASE INFO → My lease documents**

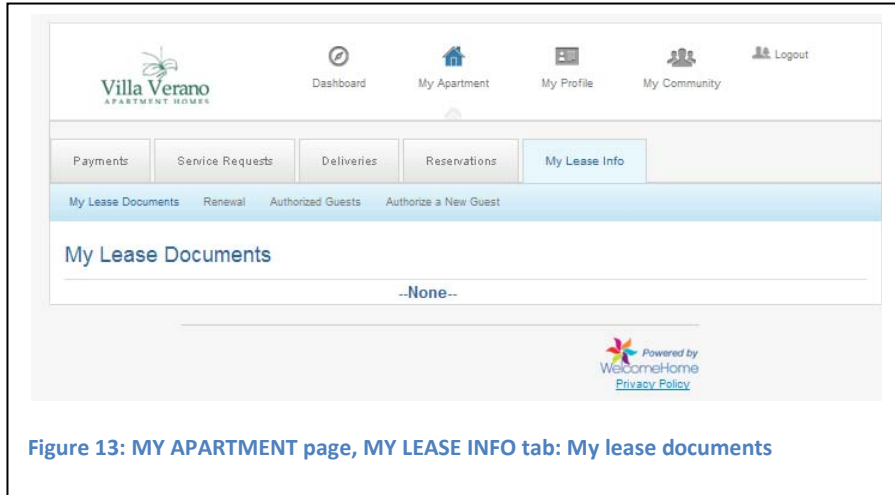
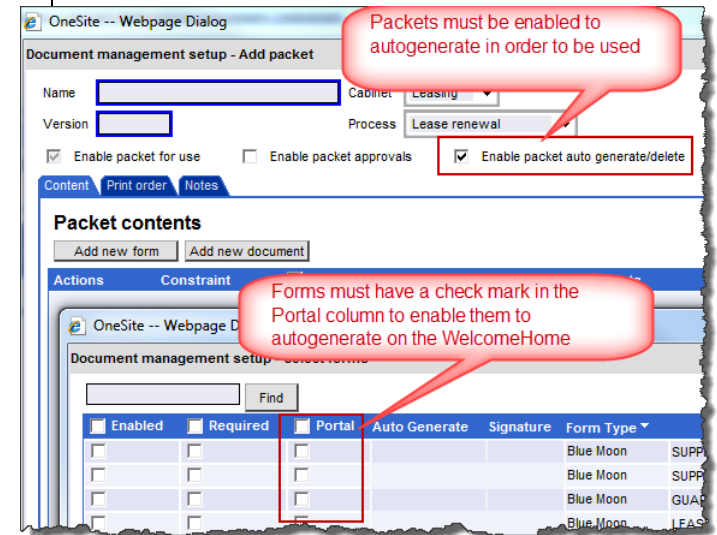


Figure 13: MY APARTMENT page, MY LEASE INFO tab: My lease documents

The **My lease info** tab of the **MY APARTMENT** page has four features residents can use to stay on top of their lease obligations. The first two features, **My lease documents** and **Renewal**, are driven by setup options in CrossFire and Document Management. The second two features, **Authorized Guests** and **Authorize a New Guest**, are driven by setup options in CrossFire, Concierge, and Document Management.

Product Center	Setup Information
CrossFire	A resident's first and current lease may appear on WelcomeHome if the resident completed the application electronically. Otherwise, the current lease may not be viewable until the resident completes an online renewal of the lease.
Document Management	<p>For a resident's leasing documents to be available for review on the <b>My lease documents</b> page, the CrossFire Online Renewals product center must be enabled. Then, the packets and documents must be set up as viewable on the resident portal in Document Management.</p> <p>Packets and documents intended for use on WelcomeHome must be setup to autogenerate. Forms (documents) added to packets must be set up for the portal, as shown below.</p>
Concierge	Concierge product center must be implemented and configured for WelcomeHome. If the property requires residents to sign authorization forms in order for the concierge to give keys to guests and let guests into



apartments, then those Concierge documents must be set up in Document Management. The seeded packet called **Concierge authorization** and two seeded documents are available for this purpose, shown below.

The screenshot displays the OneSite software interface. At the top, there is a navigation bar with tabs for 'Today', 'Prospects', 'Applicants', 'Residents', 'Facilities', 'Docs', 'Reports, SDE and Tasks', and 'Payroll'. Below this is a secondary navigation bar with buttons for 'New prospect', 'Available units', 'Find person', 'Calculator', 'Ledger', 'Service request', and 'Accounting'. The main area is titled 'Libraries' and 'Packet library (Make this your OneSite start page)'. A search bar is present with a 'Find' button and a dropdown for 'Packet types' set to 'All'. The 'Packets' section shows a list of items: 'Concierge authorization', 'Concierge Authorization', and 'Lease renewal'. A 'Concierge Authorization' dialog box is open, showing details for the selected packet. The dialog includes fields for 'Name' (Concierge Authorization), 'Version' (OneSite 1.0), 'Cabinet' (Leasing), and 'Process' (Concierge authorization). There are three checkboxes: 'Enable packet for use' (checked), 'Enable packet approvals' (unchecked), and 'Enable packet auto generate' (checked). Below the dialog, the 'Packet contents' section is visible, showing a table of associated documents.

Actions	Constraint	Required	Type	Documents
	Concierge apartme...	✓	Document	Concierge Apartment Access
	Concierge key rele...	✓	Document	Concierge Key Release

## MY APARTMENT → MY LEASE INFO → Renewal

**Renew Your Lease**

1. Choose a Renewal Offer

2. Review Lease Terms

3. Sign Your Lease

**Lease Renewal**

Lease Duration | **Upgrades** | Additional Terms

**Lease Offer Introduction**

**CHOOSE A LEASE TERM**

- \$1,455.00/mo. for 3 Months.
- \$1,364.00/mo. for 6 Months.
- \$1,334.00/mo. for 9 Months.
- \$1,819.00/mo. for Month to month.

The prices above are based on 4/30/2013 renewal date.

Rent amounts include rent charges only, and do not include any items charged separate from rent.

Cancel | Continue

Online renewals are set up in CrossFire, Leasing & Rents, and Document Management.

Product Center	Setup Information
RealPage Central <i>User rights</i>	<p><b>RealPage Central → Setup → Users</b></p> <p>There are specific <b>user rights</b> required for setting up online renewals:</p> <ul style="list-style-type: none"> <li>Allow access to manage the setup information on the General, E-mail invitation, Portal notice, Lease offer introduction, Review lease, Sign lease, and Renewal receipt tabs</li> <li>Allow access to manage the upgrades in Online Renewals setup</li> </ul>

	<ul style="list-style-type: none"> <li>Allow access to manage the Incentives in Online Renewals setup</li> </ul>
CrossFire Online Renewals	<b>Setup → General information and property settings → Centers</b> This product center must be enabled for the property to offer renewals online through the WelcomeHome resident portal.
Leasing & Rents <b>CHOOSE A LEASE TERM</b>	<b>Leasing &amp; Rents → Setup</b> The terms of the leases offered during renewal offers are set up in Leasing & Rents. When you generate the renewal offer through the Renew Now Wizard, you select which of the leases that have been set up in Leasing & Rents are presented to the resident through the portal. Those are the lease offerings that show up here.
Leasing & Rents <i>Amenities as upgrades</i>	<b>Leasing &amp; Rents → Setup → Maintain site amenities</b> <b>CrossFire → Online renewals setup → Upgrades</b> Amenities can be offered as upgrades by setting up the floor plans that are eligible for the amenity, as shown below.

**Maintain site amenities**

Adding amenities to floor plans will not affect the market rent.

Amenity	Value	Search group	Floorplans	Units	View	Marketing Name	Online Renewal upgrade Eligible floor plans	Online Leasing upgr Eligible units
<b>Built-ins And Shelving</b>								
Wet bar	0	Wet bar	5	0	<input checked="" type="checkbox"/>	Wet bar	0	0
Window seats	0		2	0	<input checked="" type="checkbox"/>	Window seats	0	0
<b>Kitchen</b>								
Granite countertop	50	Stone/granite countertops	5	0	<input type="checkbox"/>	Beautiful granite countertop	4	0
Hardwood kitchen floor	50		0	0	<input type="checkbox"/>	Complete your home with hardwood floors	4	0
<b>Kitchen Appliance</b>								
Refrigerator	35	Side-by-side refrigerator	0	0	<input type="checkbox"/>	Upgrade to a larger refrigerator	4	0
<b>Laundry</b>								
Stackable washer/dryer	50	Stackable washer/dryer	5	0	<input type="checkbox"/>	Stackable washer/dryer	0	0
<b>Living &amp; Dining Areas</b>								
Hardwood	150	Hardwood floor	5	0	<input type="checkbox"/>	Hardwood	0	0

<b>CrossFire Upgrades</b>	<b>CrossFire → Online renewals setup → Upgrades</b> After amenities have been set up as upgrades, you must enable those amenities as upgrade offerings in <b>CrossFire</b> . If you are also allowing rentable items (also set up in Leasing & Rents) to be offered as upgrades, they must be enabled as such in <b>CrossFire</b> , as shown
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below. Rentable items that have been set up in Leasing & Rents can also be offered as upgrades during online lease renewals by selecting the **Do you want to display rentable items in Online Renewals?** check box on the **Upgrades** tab.

## Additional Information About Online Renewals

### Renew Now Wizard

When you finish all aspects of online renewal setup, and then begin processing online renewals for residents, *you must always remember to finish* the lease renewal in Leasing & Rents by completing the **Renew now/MTM** wizard. Receiving the resident's electronic signature (eSignature) and completing the countersignature does not complete the leasing process. You must have all of the required electronic signatures for the unit being renewed, *and* you must complete the last three steps of the **Renew now** wizard. Completing the **Renew now** wizard is what sets the new rent rate with any increases and amenities the resident has added, and updates the term of the lease.

### Incentives

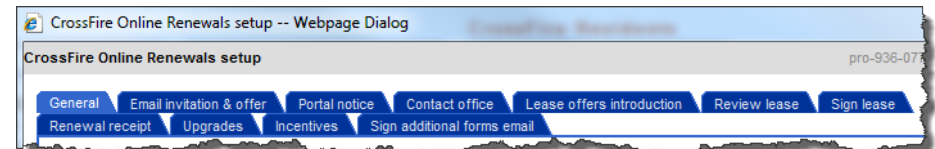
Incentives are set up through **CrossFire**. If you include incentives in online renewal offerings, you will need to ensure that you have a business process in place to account for the incentives that residents accept. There is not a way within **CrossFire** or Leasing & Rents to account for the cost of incentives or the reduction in your incentive inventory as the incentives are accepted by residents when they renew online.

### Online Renewal Setup Tabs

In **CrossFire**, you must review all the tabs of the **Online renewals setup** page, shown below. Many of the text fields are optional, but there are other fields that you will want to configure according to your property's business rules and lease terms and other legal criteria.

The screenshot shows the 'CrossFire Online Renewals setup' page with the 'Upgrades' tab selected. The page contains several sections for configuring online renewal options:

- Upgrades Section:** Includes a text field for the main instruction, a checkbox for 'Do you want to display amenities configured as upgrades in Online Renewals?' (checked), and a text field for 'Amenities as "upgrades"'. A red callout bubble points to the checked checkbox with the text: 'You must select this check box for amenities configured as upgrades to appear on the online renewal offer.'
- Rentable Items Section:** Includes a text field for the instruction, a checkbox for 'Do you want to display rentable items in Online Renewals?' (unchecked), and a text field for 'Rentable items as "rentable options"'. A red callout bubble points to the unchecked checkbox with the text: 'You must select this check box for rentable items offered as upgrades to appear on the online renewal offer.'



## MY APARTMENT → MY LEASE INFO → Authorized Guests

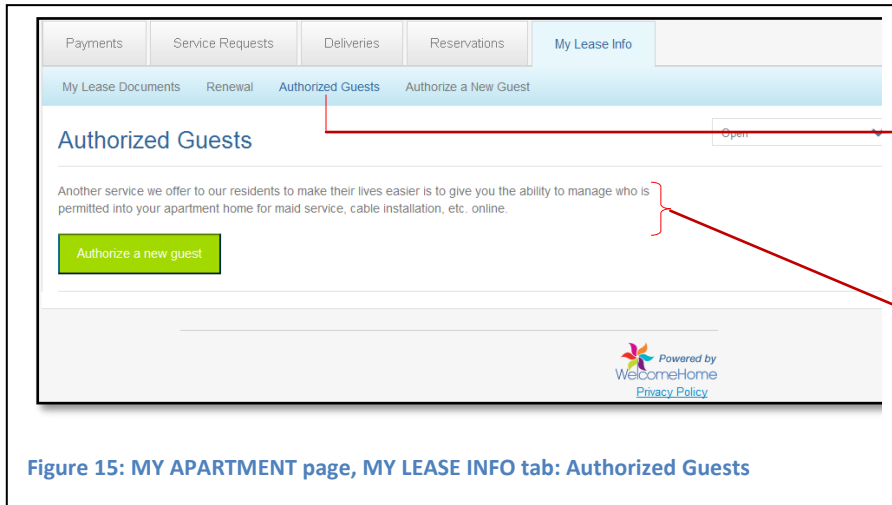


Figure 15: MY APARTMENT page, MY LEASE INFO tab: Authorized Guests

The **Authorized Guests** tab on the **MY APARTMENT** page of WelcomeHome is available if your property is using the Concierge product center. This page lists any pending guest authorizations for the resident. Depending on whether the property requires guest and employee signatures to manage resident keys and opening apartments for guests to enter, you may also need to set options in the Document Management product center, as explained on page 16.

Additionally, there is setup to be done on the **Portal content** page of **CrossFire** in order for deliveries and guest services to work properly in WelcomeHome.

Page Element	Setup Information
Authorized Guests	<p><b>CrossFire → Portal users → Edit → Resident profile</b></p> <p>To view the <b>Authorized Guests</b> and the <b>Authorize a New Guest</b> tabs, residents must be granted access to <b>Online concierge services for guest registrations</b> in their <b>Resident profile</b>.</p>
Authorized Guests Message	<p><b>CrossFire → Resident portal setup → Portal content → Online concierge services</b></p> <p>You must first select the <b>Enable concierge services online</b> check box before you will be able to edit the guest message. This check box is near the bottom of the <b>Portal content</b> page in the section titled <i>Online concierge services</i>.</p> <p><b>CrossFire → Resident portal setup → Portal content → Online concierge services</b></p> <p>Further down the same page, define the welcome message you want to appear on the <b>Authorized Guests</b> page of WelcomeHome by filling the <b>Guest</b> tab in the first text box with tabs under the <i>Online concierge services</i> section of the <b>Portal content</b> page.</p>

The text you enter here will display as the instruction for the concierge service page

[Click here](#) to see an example of where the text is used.

Main Delivery **Guest**

Another service we offer to our residents to make their lives easier is to give you t  
maid service, cable installation, etc. online.

**MY APARTMENT → MY LEASE INFO → Authorize a New Guest**

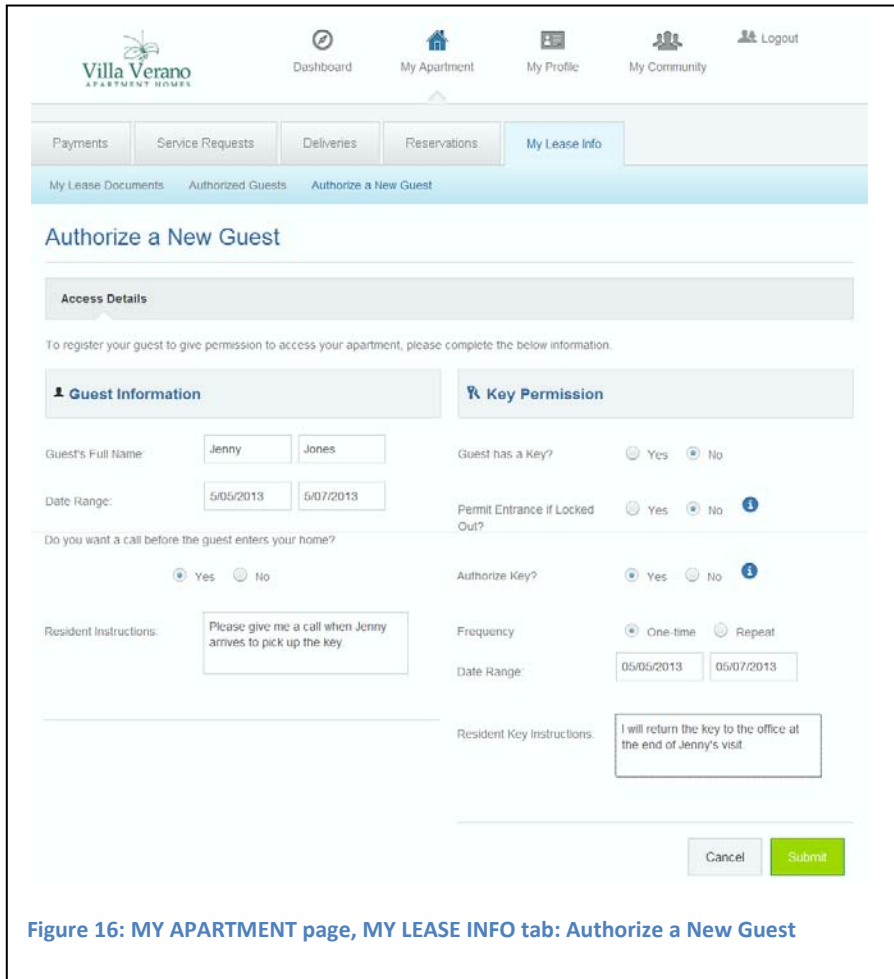


Figure 16: MY APARTMENT page, MY LEASE INFO tab: Authorize a New Guest

When residents click the **Authorize a new guest** button, it opens the **Authorize a new guest** sub-tab of the **My lease info** tab on the **MY APARTMENT** page of WelcomeHome.

The setup for authorizing guests involves **CrossFire** , Concierge, and Document Management.

Page Element	Setup Information
Guest Information	<p><b>CrossFire → Resident portal setup → Portal content → Online concierge services</b></p> <p>Concierge must be an enabled product center and it must be configured for portal use before residents will be able to access and use the guest pages of WelcomeHome. Online concierge services must be enabled at <b>CrossFire</b>.</p> <p><b>CrossFire → Portal users → Edit → Resident profile</b></p> <p>Residents must have access permission to use guest and key concierge services.</p>
Key Permission	<p><b>OneSite → Setup → Concierge</b></p> <p>Key permissions and apartment entry are configured primarily through the setup options for Concierge. Properties that require signature authorization from residents as a condition of the concierge providing keys or apartment entry to guests requires that a concierge packet with those kinds of documents be set up in Document Management, as explained on page 24.</p>



**MY APARTMENT → MY LEASE INFO → Submit a Guest Authorization?**

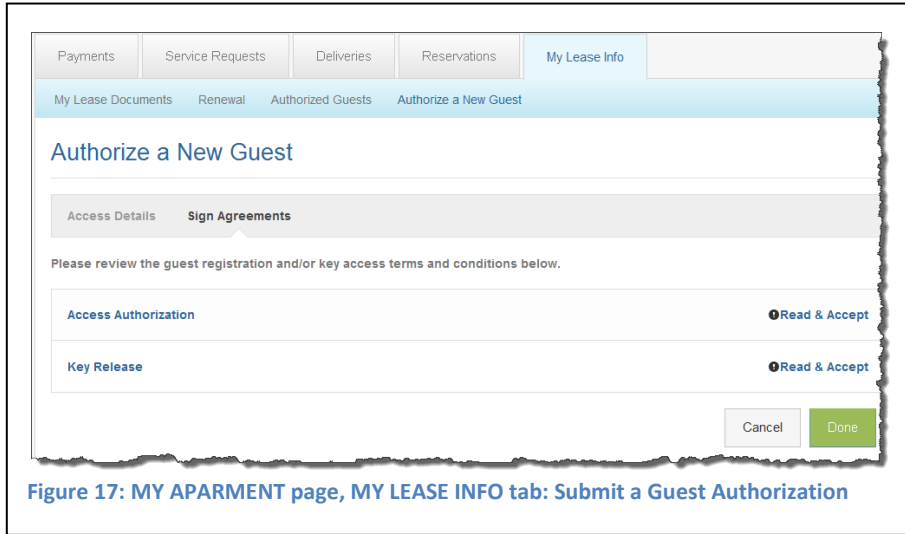


Figure 17: MY APARMENT page, MY LEASE INFO tab: Submit a Guest Authorization

For properties that require resident signature authorization for concierge key and entry service, when the resident submits a request for the service, the resident is presented with the authorization forms for eSignature.

If the packet has been set up correctly for the portal, then the resident can click the **Read & Accept** links, read through the PDF forms presented, and then apply his e-signature, and click **Accept** to submit the signed form to the leasing office.

Page Element	Setup Information
Authorization Document Types	<p><b>Setup → Document Management → Manage document types</b></p> <p>If the property requires residents to sign authorization forms before staff provide guests with a key or entry to the apartment, make sure you have two document types enabled at the property:</p> <ul style="list-style-type: none"> <li>• Concierge Apartment Access</li> <li>• Concierge Key Release</li> </ul>
Concierge Authorization Packet	<p><b>Setup → Document Management → Packet library</b></p> <p>In most cases, you will perform Document Management setup at RealPage Central and push the <b>Concierge authorization</b> packet to the property. The packet is seeded and contains the Concierge Apartment Access and/or the Concierge Key Release document types.</p> <p>Each document type has one constraint applied to it: <i>Concierge apartment access authorization</i> and <i>Concierge key release authorization</i>, respectively.</p>

**MY PROFILE page**

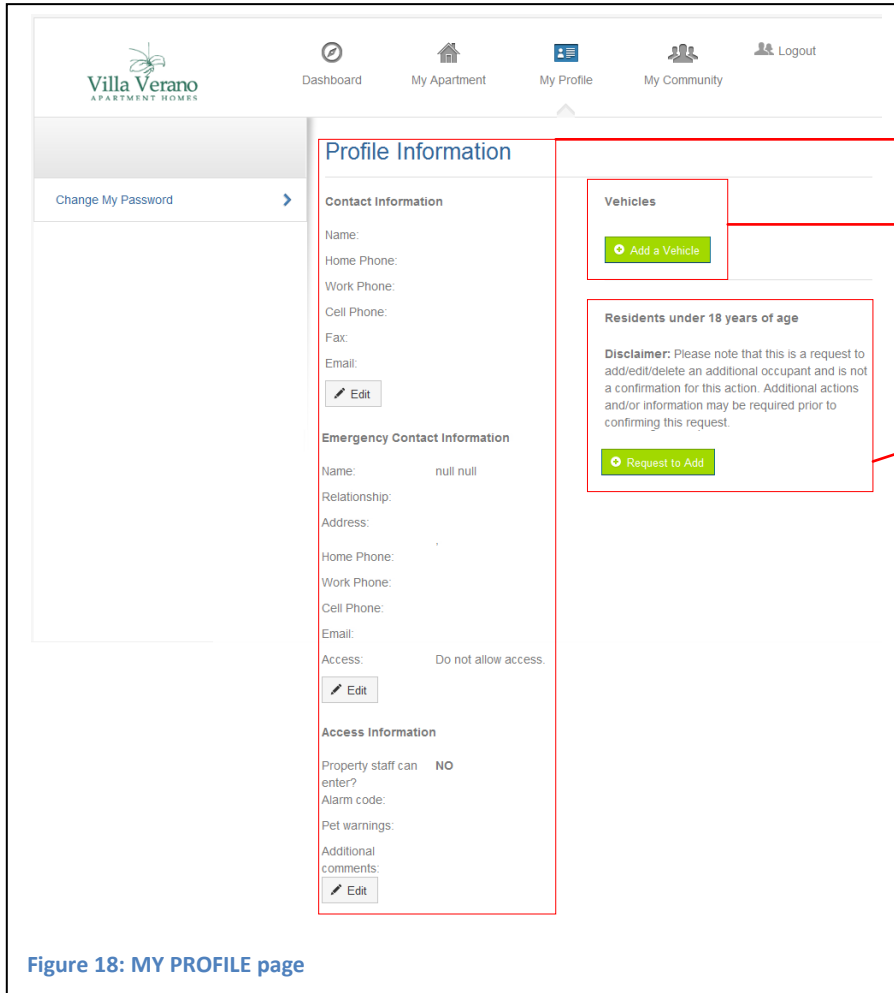


Figure 18: MY PROFILE page

The **MY PROFILE** page displays information from the OneSite **Resident at a glance** page. This information can be entered by a leasing consultant or by the resident through WelcomeHome. The resident can change some of this information from the **MY PROFILE** page. *There are no setup options that control the information displayed on this page.*

Page Element	Information Comes From or Is Entered Into:
Contact Information	<b>CrossFire → Portal Users → Edit → General information</b>
Emergency Contact Information	<b>CrossFire → Portal Users → Edit → Emergency contact</b>
Access Information	<b>Find person → View → Miscellaneous</b>
Add a Vehicle	<b>Find person → View → Miscellaneous</b> If the resident requests to add a vehicle, it is added to the information on the <b>Miscellaneous</b> tab of the <b>Resident at a glance</b> page as soon as the request is submitted.
Request to Add	<b>Find person → View → Contacts → New</b> If the resident requests to add a minor resident to the unit, an e-mail notification is sent to the e-mail address assigned to the <b>Resident profile update</b> notification type. This e-mail address is set up on the <b>E-mail setup</b> page of <i>Web site setup</i> in <b>CrossFire</b> .

**MY COMMUNITY page, OVERVIEW tab**

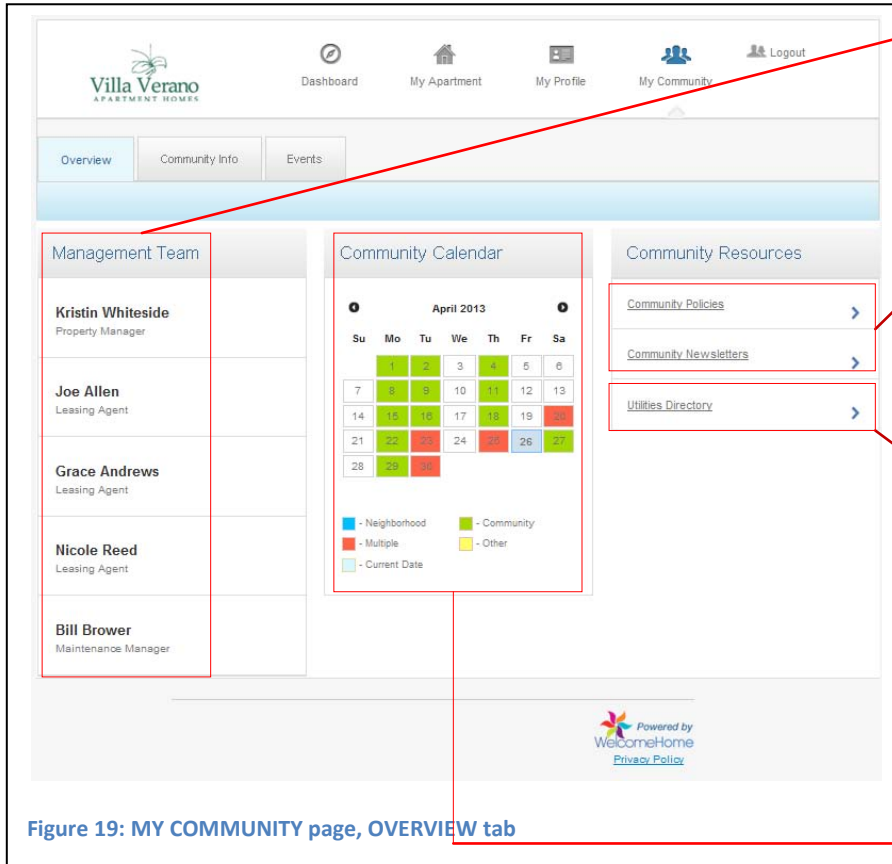


Figure 19: MY COMMUNITY page, OVERVIEW tab

On the **Overview** tab of the **MY COMMUNITY** page provides the resident with names of the community staff, a calendar of community events, access to the community policies and newsletters, and contact information on community utility providers.

Page Element	Setup Information
Management Team	<p><b>CrossFire → Resident portal setup → Portal content</b></p> <p>In the <i>Management staff</i> section of the <b>Portal content</b> page, define the names and titles of four property staff contacts to display here.</p>
Community Newsletters, Policies, Lease Forms, and Resident Forms	<p><b>CrossFire → Upload documents</b></p> <p>To provide residents a copy of the property’s newsletters, policies, and forms, you must first upload those documents to the appropriate sections of the <b>Upload documents</b> page.</p> <p><b>OneSite → Residents → Contact → Edit → Resident profile</b></p> <p>To view policies or newsletters, residents must have access permission to <b>Uploaded documents</b> in their <b>Resident profile</b>.</p>
Utilities Directory	<p><b>CrossFire → Resident portal setup → Portal content</b></p> <p>To provide residents with contact information for the community’s utility providers, define each provider in the <i>Utility contact information</i> section of the <b>Portal content</b> page.</p> <p>For each provider, you enter the type of utility, and the provider’s name, phone number, and web site address. You must also flag each provider you want to display in WelcomeHome and the order in which they appear.</p>
Community Calendar	<p>The <i>Community Calendar</i> shown here is a summary of the information on the <b>Events</b> tab.</p>

**MY COMMUNITY page, COMMUNITY INFO tab**

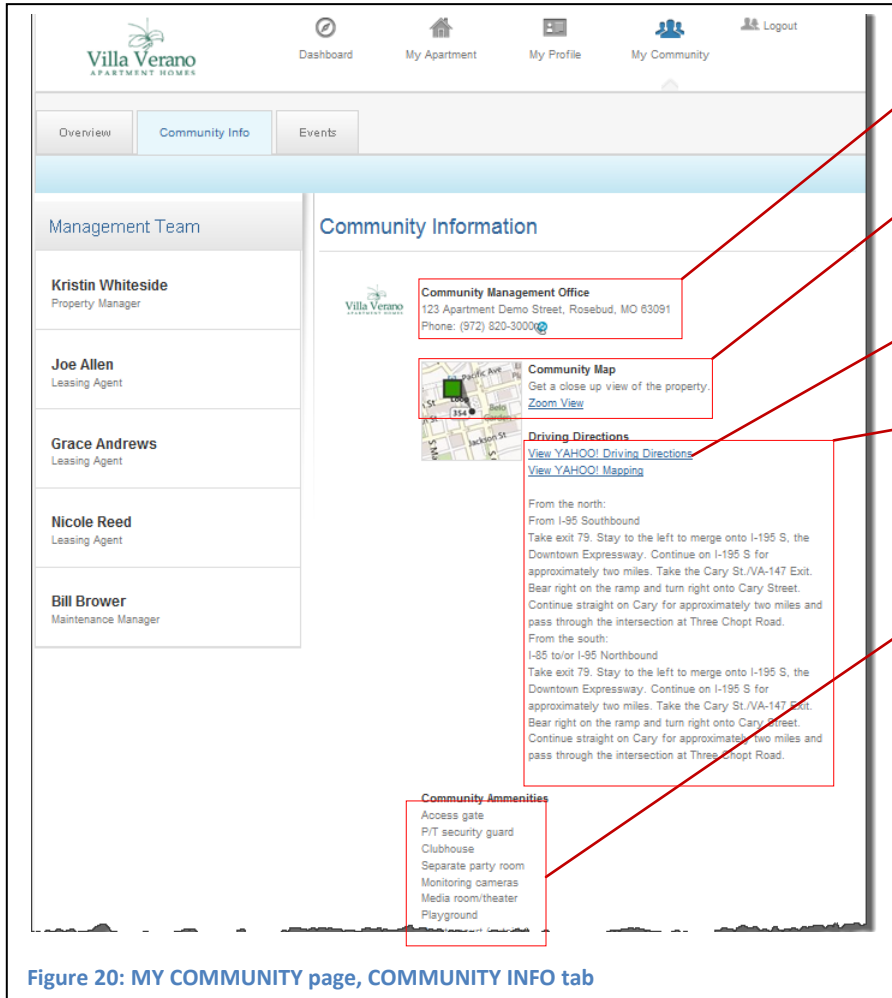


Figure 20: MY COMMUNITY page, COMMUNITY INFO tab

The **Community info** tab of the **MY COMMUNITY** page presents information about the property and community amenities.

The community information is set up in the *Web site setup* section of the main **CrossFire** page and the *CrossFire* section of the **Setup** page.

Page Element	Setup Information
Management Office Address and Phone Number	<b>CrossFire → Web site setup – Address &amp; phones</b> The property address and phone number are defined at the <b>Address &amp; phones</b> option.
Community Map	<b>Setup → Crossfire – Property web site →Map &amp; directions</b> You can either upload a map of the property’s location or you can choose to use a Microsoft Map Point map.
Yahoo Driving Directions and Mapping	<b>Setup → Crossfire – Property web site →Map &amp; directions</b> Choose the option to <b>Use map and driving directions from mapping system?</b> to include Yahoo links.
Driving Directions	<b>Setup → Crossfire – Property web site →Map &amp; directions</b> Include your own customized driving directions at the <b>Map &amp; directions</b> page.
Community Amenities	<b>CrossFire → Web site setup – Amenities → Click here to set up your amenities</b> The amenities listed here are the site amenities defined for the property.

**MY COMMUNITY page, EVENTS tab**

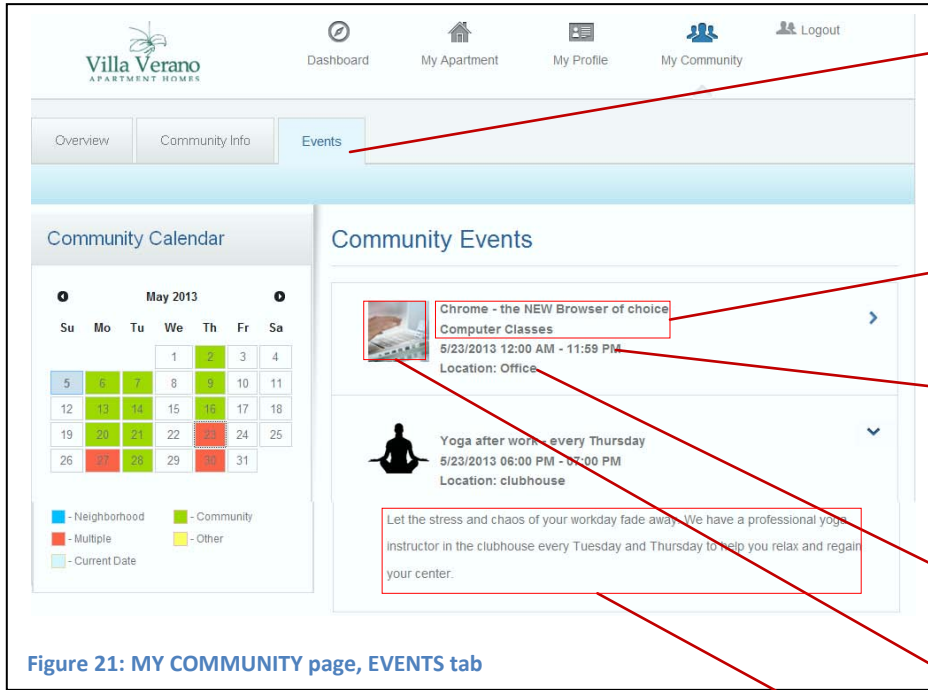


Figure 21: MY COMMUNITY page, EVENTS tab

The **Events** tab displays a color-coded calendar for the current month on the left side of the page. When a resident clicks a day with an event, the event detail displays in the *Community Events* section of the page. Clicking the right-arrow on an event displays the event details. The information displayed on this page is set up on the **Calendar of events** page in **CrossFire** . Complete the following options for each event, categorizing each event as community, neighborhood, or other.

Page Element	Setup Information
Events	<b>OneSite → Residents → Contact → Edit → Resident profile</b> To view the community events calendar, residents must have access permission to the <b>Calendar of events</b> in their <b>Resident profile</b> .
Event Title and Subtitle	<b>CrossFire → Resident portal → Calendar of events</b> To create an event for the calendar, click <b>Add</b> on the <b>Calendar of events</b> page to open the <b>Add an event</b> page. Enter a main title for each event. The subtitle is optional.
Date and Time	<b>CrossFire → Resident portal → Calendar of events</b> For one-time events, enter the event date and time on the <b>Add an event</b> page. For recurring events, enter the date and time when the first event occurs, and then define the frequency. You can also define an end date and end time.
Location	<b>CrossFire → Resident portal → Calendar of events</b> On the <b>Add an event</b> page, enter the location where the event occurs.
Image	<b>CrossFire → Resident portal → Calendar of events</b> On the <b>Add an event</b> page, upload an image for the event. Or, you can a graphic icon instead of a picture.
Details	<b>CrossFire → Resident portal → Calendar of events</b> Enter a more detailed description of the event if necessary.

## E-mail Notifications

### *New Resident E-mail Notification*

If you want to customize the wording and overall content of the first e-mail letter a new user of WelcomeHome may receive, you should configure the **Portal e-mail setup** page in **CrossFire**.

**CrossFire → Resident portal setup - Portal e-mail setup**

### *Property Staff E-mail Notifications*

The **E-mail setup** page in **CrossFire** is where you set up who within your company receives the different types of e-mail messages that are automatically generated by **CrossFire**. On the right of the page, each category of automatic e-mail is listed, with the address(es) that will receive that automatic e-mail message beneath it. Use this page to set up the property e-mail addresses and then map the various types of notifications to those addresses. You can map multiple types of messages to the same address.

**CrossFire → Web site setup – E-mail addresses**

To ensure that the appropriate individuals and groups are notified when particular inquiries and events occur, take care to set up the following e-mail addresses appropriately.

- **Billing inquiries:** Depending on the template used for your web site, there may be a link for residents to click when they have a question about billing. The link will be associated with the e-mail address you enter here. Make sure this e-mail address is one that is monitored frequently.
- **Comments & suggestions:** Depending on the template used for your web site, there may be a link for residents to click when they have a comment or suggestion regarding the property and community. The link will be associated with the e-mail address you enter here. Make sure this e-mail address is one that is monitored frequently.
- **Daily appointments e-mail:** Depending on the template used for your web site, there may be a link for residents and prospects to click to set up an appointment with your office personnel. The link will be associated

with the e-mail address you enter here. Make sure this e-mail address is one that is monitored frequently.

- **General:** Depending on the template used for your web site, there may be a link for residents to click when they have a general inquiry about the property, or have other communication they want to share with you. The link will be associated with the e-mail address you enter here. Make sure this e-mail address is one that is monitored frequently.
- **Notice to vacate:** Depending on the template used for your web site, there may be a link for residents to click when they want to give notice that they will be moving out. The link will be associated with the e-mail address you enter here. Make sure this e-mail address is one that is monitored frequently.
- **Renewal notice:** The leasing consultant assigned to a renewal will receive e-mail messages regarding the progress of an online renewal. If a renewal is assigned to “House” rather than to a specific leasing consultant, then the e-mail address that you put here is the address where automatic e-mail messages regarding renewals will be sent. If there is no e-mail address set up here, then the automatic e-mail messages regarding renewals will be sent to the property e-mail address in setup entered into **General information and property settings**.
- **Resident profile update:** When residents renew any of the information on their profile through WelcomeHome, a notification of that update will be sent to the e-mail address for this notification type.
- **Transfer notice:** Depending on the template used for your web site, there may be a link for residents to click when they are requesting a transfer to a different unit. The link will be associated with the e-mail address you enter here. Make sure this e-mail address is one that is monitored frequently.