

The background of the slide is a flat-lay photograph of various branded items in a muted teal color. These items include a baseball cap, a t-shirt, a backpack, a water bottle, a spiral notebook, three pens, and a pair of sunglasses. The Entrata logo, consisting of the word "entrata" in a lowercase sans-serif font, is visible on each of these items. In the top left corner, there is a white square containing the same "entrata" logo in teal.

entrata

5 Hidden Gems of ResidentPortal

Webinar –August 22, 2017

Housekeeping Items

- This webinar is being recorded
- A follow-up email will be sent with a link to the recording
- Questions can be submitted through the GoToMeeting control panel



Agenda



5 Hidden Gems



Resident Portal App



Q&A



Sam Choi
Information Systems Manager
Core Spaces



James Harris
Product Manager
Entrata



5 Hidden Gems of ResidentPortal



Move-in Checklist

Move-In Checklist

The screenshot shows the Entrata web application interface. The top navigation bar includes links for Dashboard, Leads, Applications, Residents, Corporate, Accounting, Tools, Reports, and Apps. The main menu on the left lists various modules like Company, Properties, Users & Groups, Websites, and Leasing. The central content area displays a table of checklists for 'Move-In' and 'Move-Out' tasks, categorized by property type and task count.

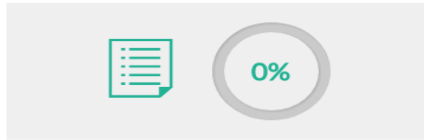
CHECKLIST	# OF TASKS	# OF PROPERTIES
Move-In		
Barclay Heights (Affordable): Move-In Checklist	10	1
Hudson Estates: Move-In Checklist	4	1
Sawyer Courts: Move-In Checklist	7	1
Move-Out		
Barclay Heights (Affordable): Move-Out Checklist	4	1
Hudson Estates: Move-Out Checklist	4	1
Sawyer Courts: Move-Out Checklist	6	1

The screenshot shows the 'Checklist Setup' page in the Entrata web application. It allows users to configure a checklist for a specific property. The page includes fields for Name, Type, and Description, as well as a list of tasks to be completed. The tasks are organized into a table with columns for Task ID, Action, and Status. The 'Status' column shows a green checkmark for completed tasks and a red circle for pending tasks.

Task ID	Action	Status
1	Background Check Run on Student	Completed
2	First Month's Rent Collected	Pending
3	Guarantor Paperwork Signed	Completed
4	Portable Items Addendum	Pending
5	Upload Picture	Completed
6	Preferred Move-in time	Pending





Move-In Checklist

MOVE-IN CHECKLIST



WELCOME TO YOUR NEW HOME

Before moving in to your new home, we have some information we need to collect from you. Please use this checklist to help you make sure we have all the information that we need.


Description	Actions
 Background Check Run on Student	
 First Month's Rent Collected	Make Payment
 Guarantor Paperwork Signed	
 Key Packet Given	
 Rentable Items Addendum	
 Upload Picture	Add Photo
 Preferred Move-in time	Text Response

Move-In Checklist

entrata Move-in Board													
RESIDENT	UNIT	MOVE-IN DATE	DAYS LEFT	PROGRESS	REVIEW MOVE-IN	BACKGROUND CHECK...	CHARGES	GUARANTOR...	KEY PACKET GIVEN	UPLOAD PICTURE	OPTIONAL INFO		
Tracking, Key	A-212-C	08/22/2016	-358	<div><div></div></div>	✓	✓	✓	✓	✓	✓	1		Move-in
Washington, George	102-B	08/22/2016	-358	<div><div></div></div>	✓	1	1	1	1	1	1		Move-in
Lead 195, Entrata Test (4)	Assign	03/15/2017	-153	<div><div></div></div>	Start	1	1	1	1	1	2		Move-in
RT Caroline, Sweet	Assign	07/22/2017	-24	<div><div></div></div>	Start	1	1	1	1	1	2		Move-in
BB, Bonnie	104-C	08/20/2017	5	<div><div></div></div>	Start	1	1	1	1	1	2		Move-in
Coleman, Cody (4)	Assign	08/22/2017	7	<div><div></div></div>	Start	1	1	1	1	1	2		Move-in

Move_in_board_2017_08_17_12_13_16 [Compatibility Mode] - Microsoft Excel																
File Home Insert Page Layout Formulas Data Review View																
Times New Roma 10 A A Wrap Text General Normal Bad Good																
B U Font Merge & Center \$ % Conditional Formatting as Table Neutral Calculation Check Cell																
Clipboard Font Alignment Number Styles Insert Delete Format AutoSum Fill Sort & Find & Filter Select																
Editing																
AS																
	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P
1	RESIDENT	UNIT	MOVE-IN DATE	DAYS LEFT	PROGRESS	Background Check Run on Student	CHARGES	Guarantor Paperwork Signed	Key Packet Given	Upload Picture	OPTIONAL INFO					
2	Tracking, Key	A-212-C	08/22/2016	-360	88%	Complete	Complete	Complete	Complete	Complete	Incomplete					
3	Washington, George	102-B	08/22/2016	-360	25%	Incomplete	Incomplete	Incomplete	Incomplete	Incomplete	Complete					
4	Lead 195, Entrata Test		03/15/2017	-155	0%	Incomplete	Incomplete	Incomplete	Incomplete	Incomplete	Incomplete					
5	RT Caroline, Sweet		07/22/2017	-26	0%	Incomplete	Incomplete	Incomplete	Incomplete	Incomplete	Incomplete					
6	BB, Bonnie	104-C	08/20/2017	3	0%	Incomplete	Incomplete	Incomplete	Incomplete	Incomplete	Incomplete					
7	Coleman, Cody		08/22/2017	5	0%	Incomplete	Incomplete	Incomplete	Incomplete	Incomplete	Incomplete					
8																
9																
10																
11																
12																

Move-In Checklist



Urgent Pending Financial Move Out

You have 55 financial move-outs overdue.

Approvals 4

Leads 57

Applicants 22

Residents 86

Res. Portal 0

Maintenance 21

Financial 99+

Help 0

Contact Needed 1

Not Progressing 14

Move-in Reviews 4

Move-ins 4

Move-outs 9

Renewals 21

Transfers 2

Rentable Items 0

Insurance 33

Reviews 0

Social Media 0

Upcoming Move-ins Awaiting Review

Look Ahead: 0 Days

PRIORITY	RESIDENT	UNIT	MOVE-IN	PROPERTY	WHAT'S NEXT
Urgent	Test, Tom Suggestion	Clinton - 1	02/16/17	Hudson Estates	<div>Review</div>
Urgent	Test, Prorate Weekly	Burlington - 2	02/16/17	Hudson Estates	<div>Review</div>
Urgent	Lead 195, Entrata Test		03/15/17	Sawyer Courts	<div>Review</div>
Urgent	Coleman, Cody		08/22/17	Sawyer Courts	<div>Review</div>

Move-In Checklist

entrata Performance Indicators >> Property Pulse								
Property Pulse								
	PROPERTY	NEW LEADS	APPLICATION STARTED	APPLICATION COMPLETED	LEASE COMPLETED	MOVE-INS	MOVE-OUTS	RENEWAL OFFERS COMPLETED
	Sawyer Courts	4	2	4	2	2	2	0
	Total:	4	2	4	2	2	2	0
Property Pulse 1.0 generated: 09/17/2017 at 4:41pm MDT								

entrata

Performance Indicators >> Property Pulse

Property Pulse - Move-Ins

Lease Data

BLDG-UNIT	RESIDENT	MOVE-IN
Sawyer Courts (Results: 2)		
104-A	Guy, Instalment	06/14/2017
A-212-A	LEMIEUX, COLLEEN	08/22/2017
Lease Data 1.0 generated: 08/17/2017 at 4:43pm MDT		



Rentable Items

Rentable Items


The screenshot shows the Entrata Sawyer Courts interface. The top navigation bar includes tabs for Property, Pricing, Marketing, Leasing, Residents, Financial, Communication, and Data Management. Below these are sub-tabs for Move-in, Move-out, Renewals, Transfers / Modifications, Maintenance, Parcel Alert, Resident Portal, Resident Insure, and Blackout Days. A search bar labeled 'Find a Setting' is on the left. A sidebar on the left lists properties: Barclay Heights (Affordable), Commercial Property, Hudson Estates, and Sawyer Courts (selected). The main content area is titled 'Rentable Items' and shows 'Rentable Items: Enabled' and 'Lease Status Allowed to Rent New Items: Future, Current, Notice'.

The screenshot shows the Entrata Sawyer Courts interface with the 'Rentable Items' configuration page. The top navigation bar includes tabs for Property, Pricing, Marketing, Leasing, Residents, Financial, Communication, and Data Management. Below these are sub-tabs for Rent, Deposits, Other Fees, Amenities, Add Ons, Pets, Specials, Renewal Offer Templates, Late Fees, Utilities, Taxes, and Preferences. A search bar labeled 'Find a Setting' is on the left. A sidebar on the left lists properties: Barclay Heights (Affordable), Commercial Property, Hudson Estates, Sawyer Courts (selected), and Sawyer Courts 2. The main content area is titled 'Rentable Items' and shows a table with columns for CATEGORY / GROUP and PRICING. The table lists categories: Parking, Amenity Rentals, and Other. Each category has a link to 'Add Rentable Item Group' and a link to 'Manage Inventory'.

Rentable Items


Menu Dashboard Payments Maintenance Messages Documents Community HI, George

RENTABLE ITEMS




Parking

ADD




Amenity Rentals Stuff

ADD





Recreation

ADD



Electronics

ADD

Your Rented Items						
Rentable Item	Item Name	Deposit	Other Fees	Rent	Status	Actions
Parking	1	-	-	\$10	Pending	 
Rent Total				\$10.00		

SAVE CHANGES CANCEL

entrata

Urgent Pending Financial Move Out
You have \$5 financial move-outs overdue

Approvals 4 Leads 17 Applicants 22 Residents 10 Res Portal 3 Maintenance 21 Financial 100 Help 13

Contact Needed 1 Not Progressing 14 Move-in Reviews 2 Move-ins 3 Move-outs 2 Renewals 21 Transfers 2 Rentable Items 5 Insurance 45 Reviews 3 Social Media 5

Move-ins 3 Move-outs 3 Approval 5

Add on Approvals

PRIORITY	ADD ON	REQUESTED	BY	UNIT	PROPERTY	WHAT'S NEXT
	Electronic(Headphones)	08/14/17	LEMIEUX, COLLEEN	212-A	Sawyer Courts	Approve
	Amenity Rentals Stuff(Amenity Rentals Stuff)	08/14/17	LEMIEUX, COLLEEN	212-A	Sawyer Courts	Approve
	Parking(1)	08/14/17	LEMIEUX, COLLEEN	212-A	Sawyer Courts	Approve
	Parking(1)	08/22/17	Washington, George	102-B	Sawyer Courts	Approve
	Parking(3)	08/22/17	LEMIEUX, COLLEEN	212-A	Sawyer Courts	Approve



Bi-Monthly Payments

Bi-Monthly Payments

Scheduled Payments

TITLE	CURRENT VALUE	Compare Settings	TEMPLATE																																			
Allow Scheduled Payments on	<table><tr><td>1</td><td>2</td><td>3</td><td>4</td><td>5</td><td>6</td><td>7</td></tr><tr><td>8</td><td>9</td><td>10</td><td>11</td><td>12</td><td>13</td><td>14</td></tr><tr><td>15</td><td>16</td><td>17</td><td>18</td><td>19</td><td>20</td><td>21</td></tr><tr><td>22</td><td>23</td><td>24</td><td>25</td><td>26</td><td>27</td><td>28</td></tr><tr><td>29</td><td>30</td><td>31</td><td></td><td></td><td></td><td></td></tr></table>	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31					-	None ▾ ?
1	2	3	4	5	6	7																																
8	9	10	11	12	13	14																																
15	16	17	18	19	20	21																																
22	23	24	25	26	27	28																																
29	30	31																																				
Allowed Scheduled Payments Amount	Fixed and Variable Amounts ▾	-	None ▾ ?																																			
Allow Max Payment Amount For Variable Payments	Hidden ▾	-	None ▾ ?																																			
Allow Single Scheduled Payment	<input type="checkbox"/> No	-	None ▾ ?																																			
Accept Partial Recurring Payments	<input checked="" type="checkbox"/> Yes	-	None ▾ ?																																			
Allow Past Resident Scheduled Payment	<input type="checkbox"/> No	-	None ▾ ?																																			
Allow Pay by Text	<input type="checkbox"/> No	-	None ▾ ?																																			
Allow Roommates to Split Payment	<input type="checkbox"/> No	-	None ▾ ?																																			
Allow Bi-Monthly Scheduled Payments	<input checked="" type="checkbox"/> Yes	-	None ▾ ?																																			
Allow Bi-Monthly Payments on	<table><tr><td>1</td><td>2</td><td>3</td><td>4</td><td>5</td><td>6</td><td>7</td></tr><tr><td>8</td><td>9</td><td>10</td><td>11</td><td>12</td><td>13</td><td>14</td></tr><tr><td>15</td><td>16</td><td>17</td><td>18</td><td>19</td><td>20</td><td>21</td></tr><tr><td>22</td><td>23</td><td>24</td><td>25</td><td>26</td><td>27</td><td>28</td></tr><tr><td>29</td><td>30</td><td>31</td><td></td><td></td><td></td><td></td></tr></table>	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31					-	None ▾ ?
1	2	3	4	5	6	7																																
8	9	10	11	12	13	14																																
15	16	17	18	19	20	21																																
22	23	24	25	26	27	28																																
29	30	31																																				
Process Scheduled Payments on Last Month of Lease	<input checked="" type="checkbox"/> Yes	-	None ▾ ?																																			

Save or Cancel

Bi-Monthly Payments

[Home](#) [Amenities](#) [Directions](#) [Residents](#) [Contact](#)

Menu

Dashboard

Payments

Maintenance

Messages

Documents

Community

Hi Ethel

Set Up Scheduled Payment

[< Back to Payments](#) | [Scheduled Payments](#)

★ Set Up a new scheduled payment and receive 500 points.

1 Payment Details

Monthly

Bi-Monthly

Payment Structure

Numeric Days

First Payment Estimate* / \$400.00

200

Second Payment Estimate* / \$400.00

200

First Payment Day*

1

Payments Start*

August 2017

Payments End

Until I Cancel or Move Out

[Home](#) [Amenities](#) [Directions](#) [Residents](#) [Contact](#)

Menu

Dashboard

Payments

Maintenance

Messages

Documents

Community

Hi Ethel

Set Up Scheduled Payment

[< Back to Payments](#) | [Scheduled Payments](#)

★ Set Up a new scheduled payment and receive 500 points.

1 Payment Details

Monthly

Bi-Monthly

Payment Structure

Numeric Days

First Payment Estimate* / \$400.00

Second Payment Estimate* / \$400.00

First Payment Day*

Second Payment Day*

Payments Start*


August 2017

Payments End




Until I Cancel or Move Out

Bi-Monthly Payments

entrata



Coldiron, Ethel ▾
Primary : 2 - 2 Hudson Estates (R11173465)

 Email  Appointment  Schedule Manual Contact

Financial

Household

Lease

Utilities

Activity

Documents


Maintenance





Ledger

Scheduled Charges and Credits

Recurring Payments

MoneyGram

 Add Payment

RECURRING PAYMENT ID	TYPE	OCCUPANT NAME	START MONTH	END MONTH	BILLED ON	LAST PAYMENT	STATUS	AMOUNT	
173342	eCheck	Ethel Coldiron	Aug 2017	Until Cancelled or Move Out	16		Active	Variable	 
173341	eCheck	Ethel Coldiron	Aug 2017	Until Cancelled or Move Out	02		Active	Variable	 
Total Amount:								\$400.00	

Lease Status: Current


Balance: **\$8,503.87**

More Actions ▾

Quick View

Edit

Primary Ph:
Secondary Ph:
Email: ethel@coldiron.com

Move-in Date: Jun 02, 2015 

Lease Start: Jul 19, 2017

Lease End: Jan 18, 2018

Late Payments: 0

Returned Payments: 0

Current Charges: \$400.00

Resident Login (Non Enrolled)



Live Poll

Highest Rated App



**WELLS
FARGO**

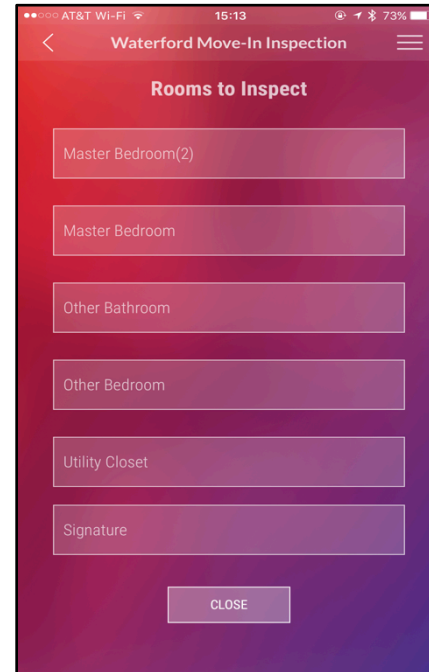
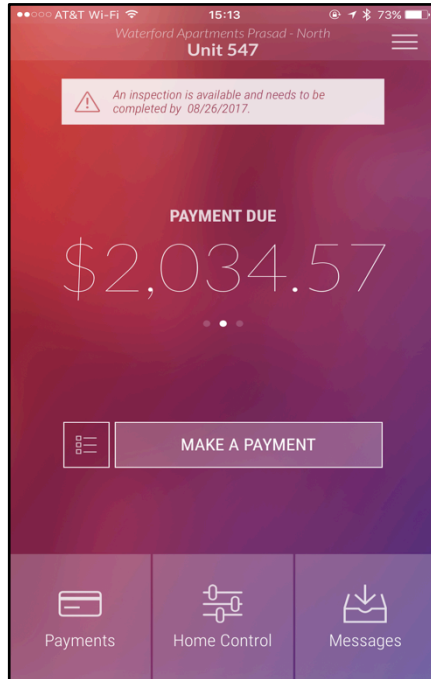
Actual App Rating



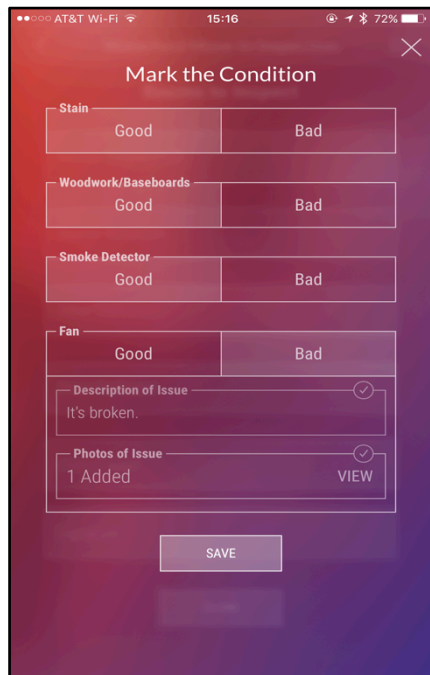
What Residents are Saying

- “ I’ve used many of these “portals” and they are horrible. This one is AMAZING ! Quick, works great and I’m happy.”
- “ This might be the easiest way I have ever paid anything! It also allows me easy access to place a trouble call, to our maintenance shop!”
- “Being able to do this much with my apartment is priceless! Maintenance requests and paying my bill with just my finger print and a few taps is priceless.”
- “It’s like having the rental office at your fingertips 24/7.”
- “Easy use for parents with college students.”

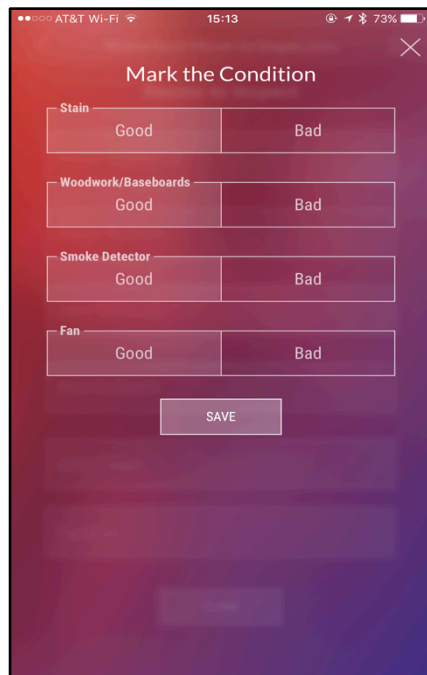
Move-In Inspection



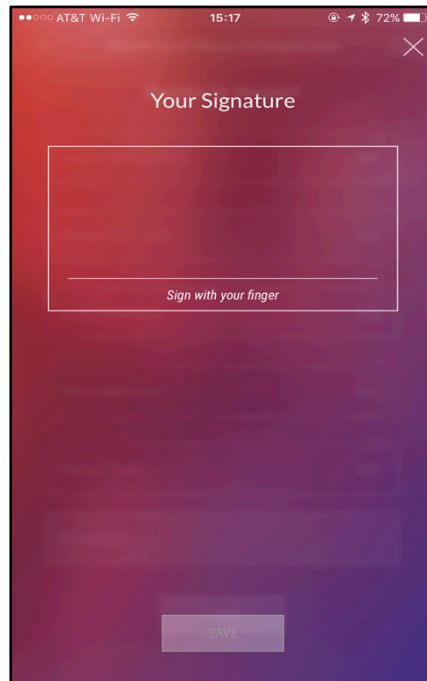
Move-In Inspection



Mobile app screenshot showing the "Mark the Condition" screen. The screen has a red-to-purple gradient background and a close button (X) in the top right corner. It contains four rows of condition selection buttons: "Stain" (Good, Bad), "Woodwork/Baseboards" (Good, Bad), "Smoke Detector" (Good, Bad), and "Fan" (Good, Bad). Below these is a "Description of Issue" section with a text input field containing "It's broken." and a checkmark icon. Below that is a "Photos of Issue" section with a text input field containing "1 Added" and a "VIEW" button with a checkmark icon. At the bottom is a "SAVE" button.

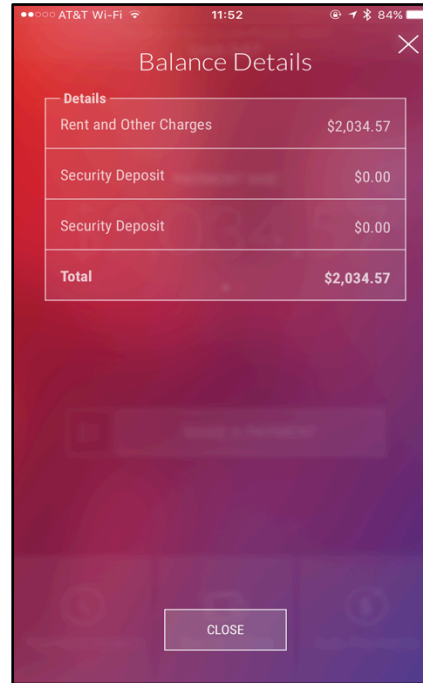
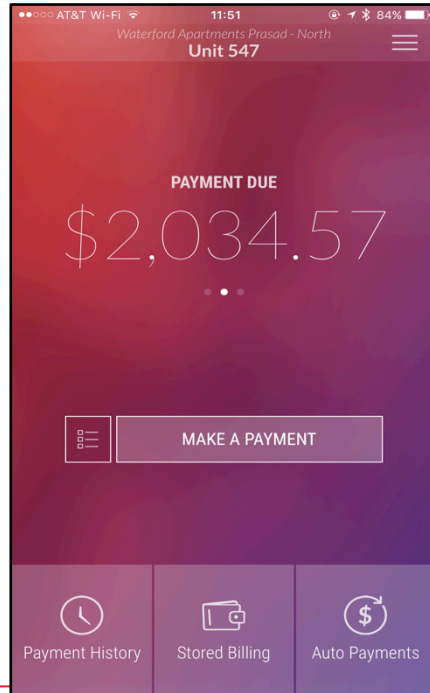


Mobile app screenshot showing the "Mark the Condition" screen, identical to the previous one, but with a "SAVE" button visible below the "Photos of Issue" section.

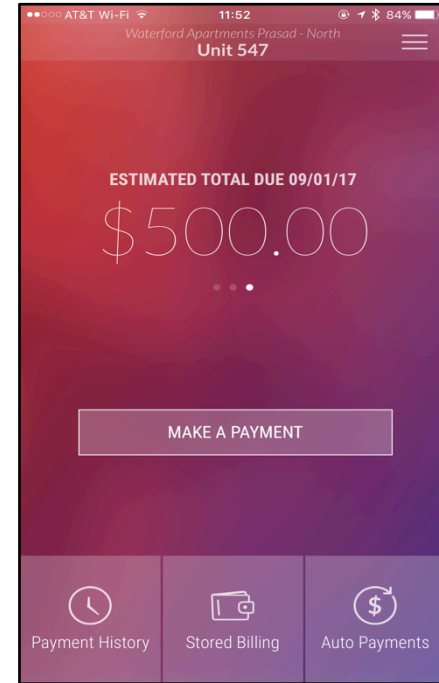
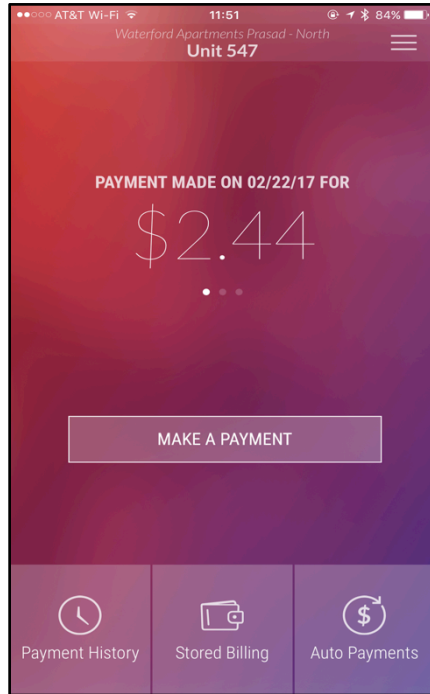


Mobile app screenshot showing the "Your Signature" screen. The screen has a red-to-purple gradient background and a close button (X) in the top right corner. It features a large rectangular box for a signature, with the text "Sign with your finger" centered below it. At the bottom is a "SAVE" button.

ResidentPortal Dashboard



ResidentPortal Dashboard





Questions?
