

## Aim of this SMART Project

- To get ATAMs acquainted with the RentCafe suite of products.
  - To provide ATAMs with the hands-on exercise to implement a sandbox property.
  - To allow ATAMs to present their property in a show-and-tell session with their Team Lead/Manager.
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## General Setup

1. Create your Voyager Property in the Voyager Sandbox Database. (*Access it via YardiOne for Canada*).
2. Add the new property to the Service Provider property list.
3. Create “Unit Types” for your property in Voyager. (Aim to have multiple unit types based on floorplans offered at your community.)
4. Create units for your unit types.
5. Add “Agents”, “Sources”, and “Results and Reasons” to your Voyager Property.
6. Add yourself as an agent so you can complete the countersignature event in the online leasing testing.
7. Create rentable items.
8. Add leasing specials to 5 of your units.

## Site Manager

1. Complete the property setup wizard to create your sandbox property in Site Manager.
  - a. Ensure you submit a Service Provider connection via Stellar for your RentCafe property.
2. Create email templates for your property for ad-hoc emails and autoresponders.
  - a. Each template should have a unique banner image and a common property logo.
  - b. Flag the templates for residents, prospects, and site managers.
3. Create and send engaging email campaigns to your registered residents.
  - a. Come up with relevant topics and content for the email campaigns. Ensure your emails have images and font colors.
  - b. E.g.: Santa’s Village Event on (*insert date*) or Elevator will be under maintenance on (*insert date*).
4. Customize your property-level autoresponder’s body content and complete related action to receive the autoresponder to your prospect or resident’s email address.
  - a. DO NOT customize the autoresponder at the Company Level.
5. Configure your property with a lease document setup and renewal lease document.
6. Enable your property for Language Translations and build a language pack for one of the supported languages.
7. Configure all Property Settings for your property.
8. Enable Conversion Optimization for the property.

## Marketing Sites

1. Create a custom amenity and title it. E.g.: “Located near the 405 HWY”.
2. Manually override the rent range for one of your plans and set the new range to “\$2337 to \$2433” after the Service Provider connection has run.
3. Add a favicon and community thumbnail image for your property.
  - a. Note: For the favicon image, you would require the image to be in squared dimensions and .ico format.
4. Add custom Page Narratives for your Amenities, Floorplans, and Photo Gallery pages.
  - a. If need inspiration, maybe try using an AI assistant. Remember not to share confidential information with the AI application.
5. Choose a new theme template and customize the font type and color brandings.
6. Incorporate a link to an external website on your website. Ensure the destination URL/page should open in a new tab.
7. Add an email communication opt-in consent page narrative for the Contact Us form.
8. Publish your RentCaffeine Marketing site using the sandbox company-level corporate domain.

## Online Leasing

1. Customize your online application, make some fields as required, and the Social Security Number (SSN/SIN) field.
2. Add the Page Narrative for your Vehicle Information section. As an example: “Please be aware that this community only allows carport parking.” Feel free to create your own.
3. Configure your property to allow the prospect to submit their application without paying application fees.
4. Set up your property to charge a security deposit fee of \$500 upon approval.
5. Create a waitlist unit type or waitlist units for your property and map them to your floorplans.
6. Submit a test application for a live unit. Your application should have the following:
  - a. Minimum of two tenants per unit above the age of 18 and marked as lessees.
  - b. Minimum 3 Upload documents with 2 as required items. E.g. Photo ID, Paystubs, Insurance, Resident Status Information, Pet Vaccination Status, etc.
  - c. Charge the security deposit via Voyager. And make the payment online using the test bank account.
  - d. Approve your prospect generate a new lease and complete the signature process. Ensure to complete the process with respective workflows in Voyager, and Site Manager.

## Resident Portal

1. Configure the Payment Processing Setup for your Property in Voyager.
  - a. The Payment Processing team takes care of this step for the client, however, seek assistance from team members to copy the configuration from an existing property over to yours.
2. Add Payment Accounts for your residents via the portal. You must add both Bank Accounts and Credit Card payment details. Then make a One-time payment of \$50.
  - a. Note: Only use dummy bank and credit card details.
  - b. Bank Account Verification cannot be completed using a Dummy Bank Account, therefore, add the dummy bank account on the tenant record in Voyager and flag it as both Default and Recurring.
3. Enable the Auto-pay tab for your property and residents.
  - a. Day Range for Pay On should be 1st to 6th.
4. Enable and submit a Maintenance Request for one of your residents.
5. Add Page Narratives for Payments and Maintenance Request screens.
6. Set up a Home Page for your Resident Portal and create an announcement to remind the residents that their rent is due on the 5th of every month.
7. Add a post to the bulletin board.
8. Complete a Renewal Workflow:
  - a. Create and approve 2 renewal proposals in Voyager.
  - b. Then as a resident, select the proposal you like the best via the Resident Portal.
  - c. Then as a leasing agent/property manager, generate a renewal lease and request for signature.
  - d. Complete the signature and countersignature process for the resident and the leasing agent/property manager.
9. Be sure to try the RentCafe Resident App for your property for free. *Download the app for iOS and Android devices from their respective app stores.*

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## Resources:

- Review the RentCafe Help Center in Site Manager or CRM IQ/Flex.
- Review the confluence pages on various topics.
  - [List of Confluence Articles](#)
  - [RentCafe Canada Sandbox Environment](#)