

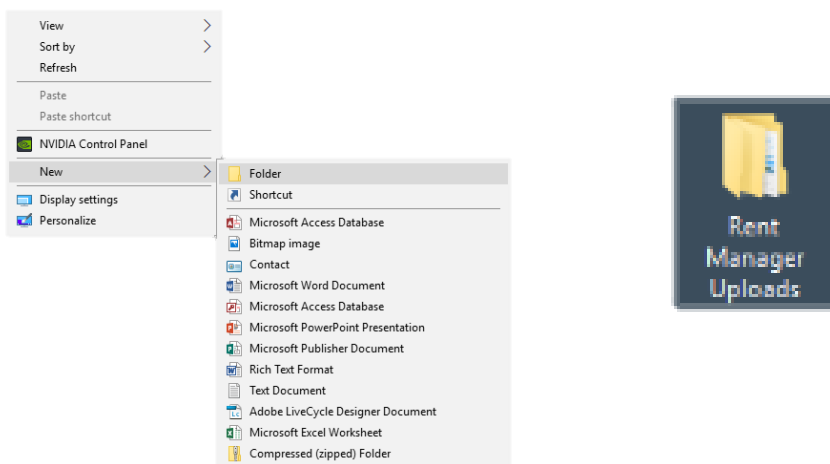
Upload Manager

Rent Manager has a feature that enables us to scan and attach documents quickly in Rent Manager. Upload Manager can be used to import any PDF or picture into Rent Manager and quickly attach it anywhere that allows attachments. It is quick and easy to set up and you can begin using this feature immediately.

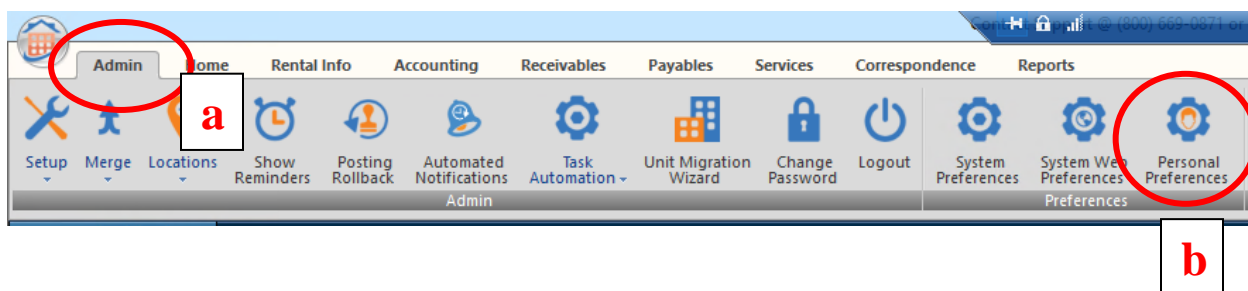
Financials Services uses this feature daily to attached invoices that have not gone through Avid, such as Mortgage/Insurance Invoices, RCA(s), legal notices, past Ledger after Community Take Overs, Vendor Documents, etc.

Please follow the steps below to set up Upload Manager on your computer.

- 1) Create a folder on your desktop
 - a) Right click on your desktop
 - b) Click on **New**
 - c) Click on **Folder**
 - d) Name your Folder "Rent Manager Uploads"



- 2) Log in to **Rent Manager**
 - a) Click on **Admin** across the top
 - b) Click on **Personal Preferences**

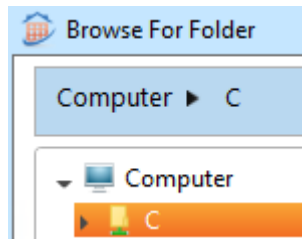


- 3) Go to **Upload Manager Settings**
 - a) Check the box **Enable Upload Manager**
 - b) After Source folder to watch, click



- c) Everyone's computers are set up a little bit different, so these next steps may vary. We can help you if you need assistance. You will get a pop-up box called **Browse for Folder**

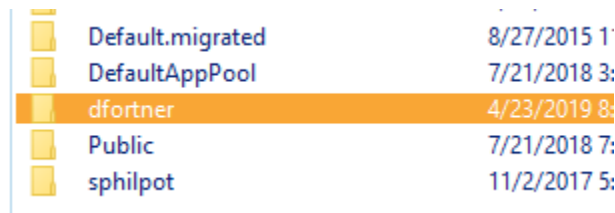
- i) Click on **C:**



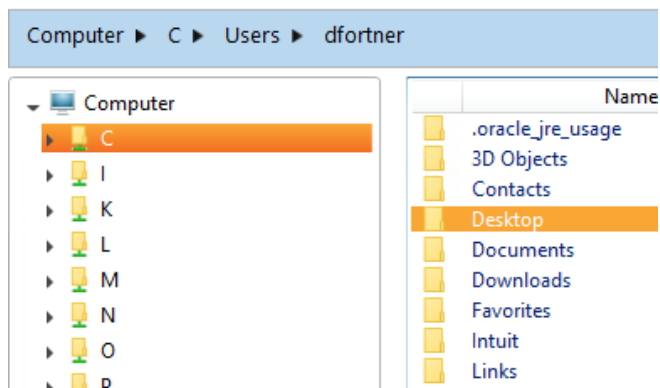
- ii) Select **Users**



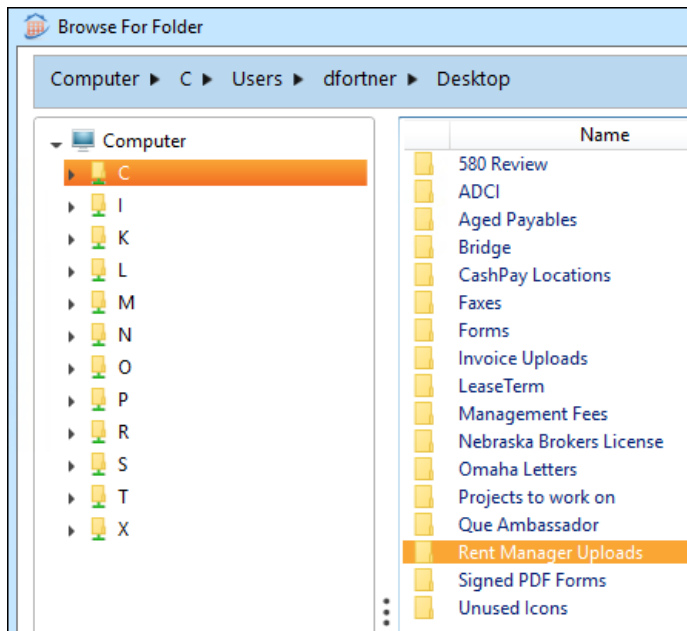
- iii) Find your name. For example, my user name is dfortner. Yours may be the only "user" listed.



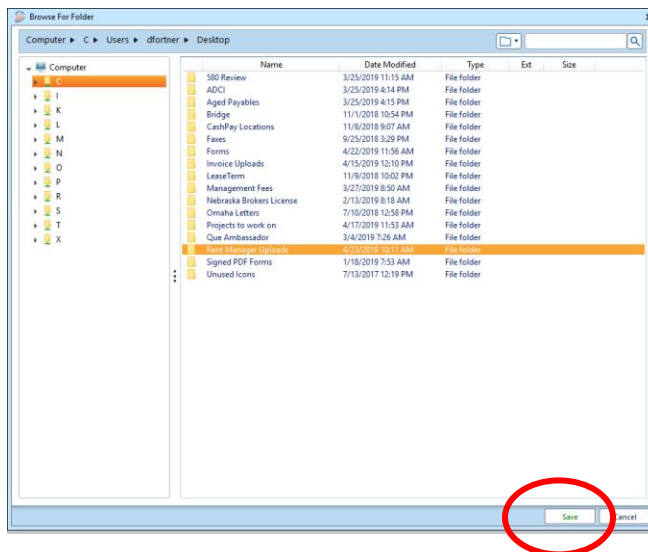
- iv) Select **Desktop**



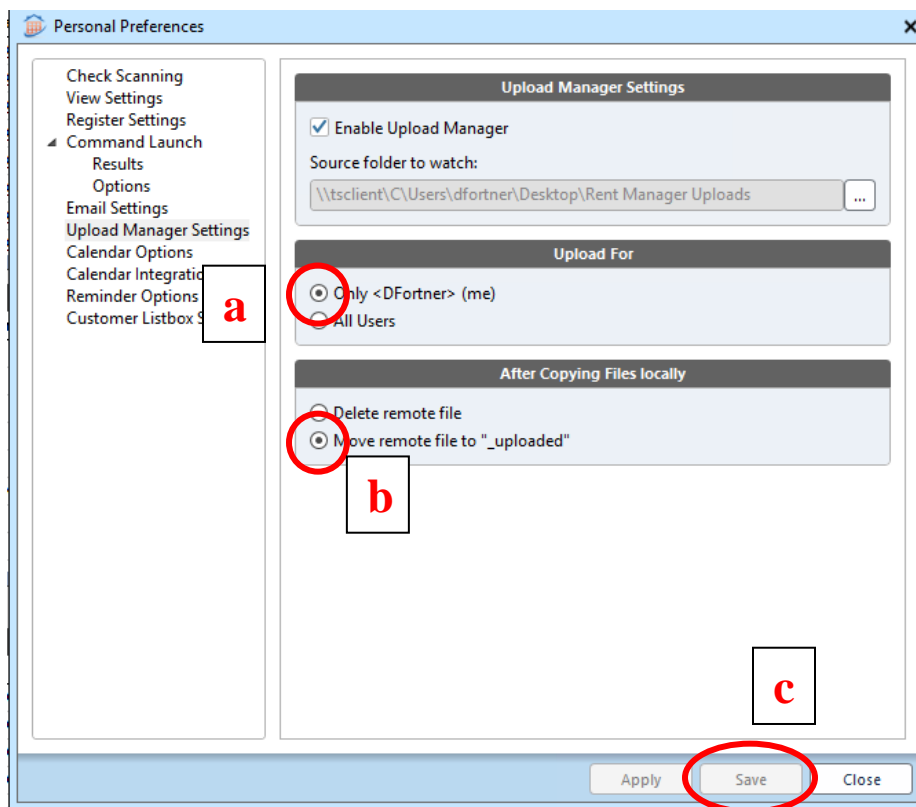
v) Click once on your folder that you created – **Rent Manager Uploads**



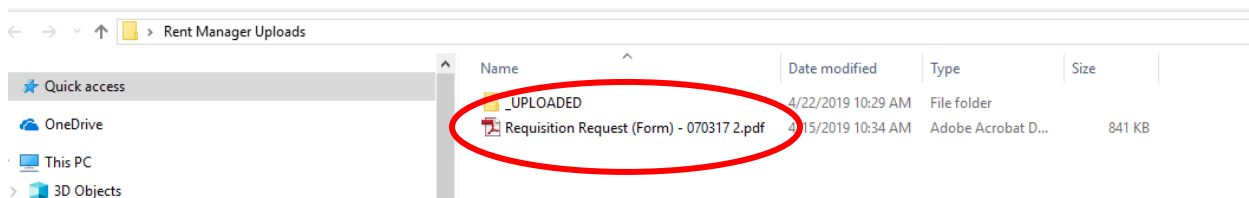
vi) Hit **Save** in the lower right-hand corner of the **Browse for Folder** box



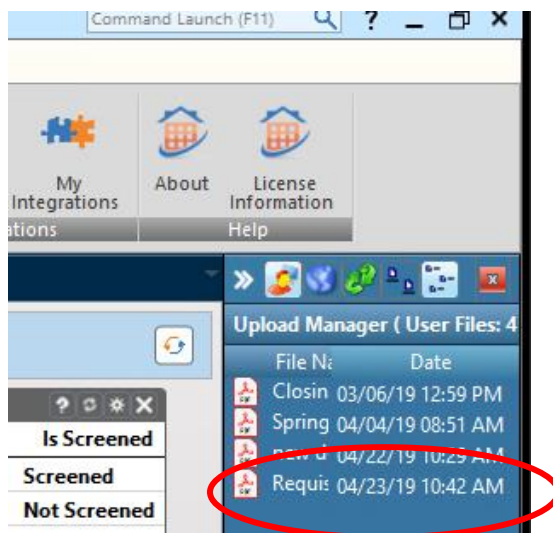
- 5) You should be back to **Personal Preferences**
 - a) In the section labeled **Upload For**, Click on **Only <your name> (me)**
 - b) In the section labeled **After Copying Files locally**, click **Move remote file to "_uploaded"**
 - c) Hit **Save**



- 6) Upload Manager is now set up and ready to use.
 - a) Begin by dragging any document into your **Rent Manager Uploads** file folder from your email or any folders on your desktop.



- b) After seconds, the file will show up in Rent Manager on the right-hand side and the file will move from your **Rent Manager Uploads** folder into the **_UPLOADED** subfolder folder. You do not have to delete the file from the folder and it will not get uploaded multiple times.



- c) Now you can click and drag this document to History/Notes on a Prospect, Customer, Service Ticket, anywhere that allows Attachments.
- d) When attaching to History/Notes, just go to History/Notes for the correct Customer, click and drag the document over to the History/Notes area and this pop-up will appear.

