Rent Track Integration Guide

Property Management Solutions for Over 30 Years

Overview

This document explains how to integrate with RentTrack to receive tenant payments.

Quick Links to Topics

Set Up – One Time Only

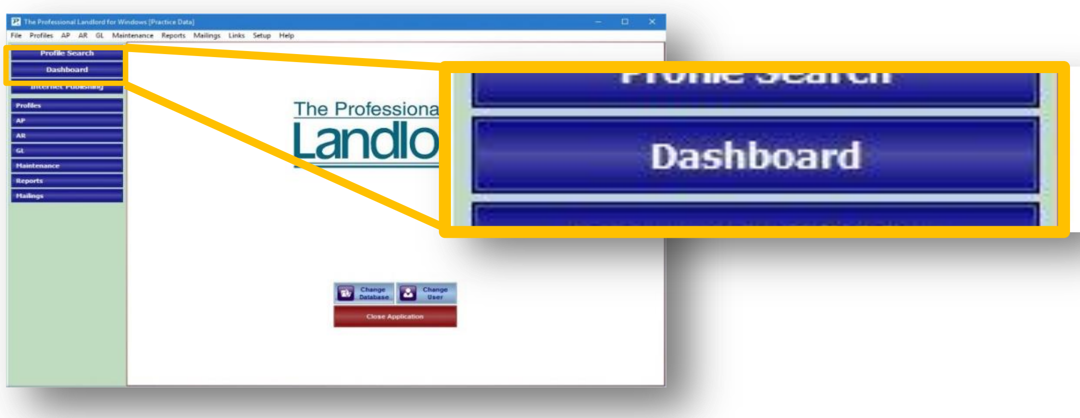
A. Get a token from RentTrack.com and add it to the Landlord 12 Dashboard.
B. How to automatically send balances to from Landlord 12 to RentTrack.
C. Verify that the bank account is properly identified in the Landlord 12 Account Code profile.

Integration Related Tasks

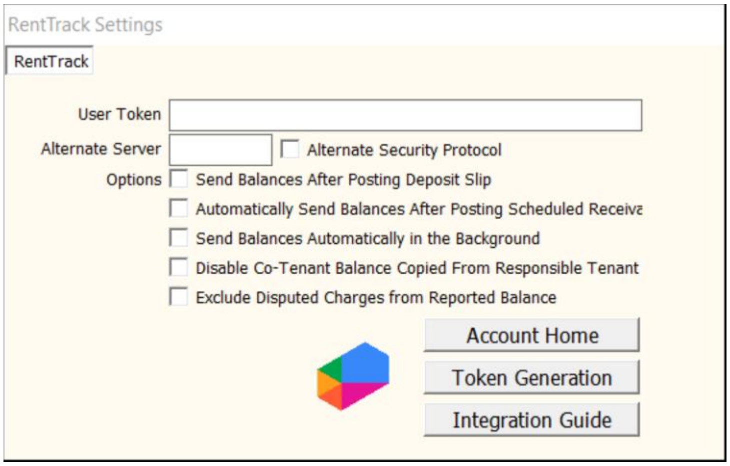
D. How to manually send balances to RentTrack (if balances are not automatically sent).
E. How to load receipts from RentTrack.

A. Get a Token from RentTrack.com and add it to the Landlord 12 Dashboard.

1. Run the Landlord 12 application and log in.
2. Open the Dashboard.
3. Click the Settings button on the RentTrack tile.
4. Click the Token Generation button on the RentTrack settings page.
5. A browser window will open. Sign in to RentTrack.
6. Click Generate New Token.
7. Highlight the token (it will be long) and right click and select Copy.



8. Go back to the Landlord 12 application RentTrack settings page.
9. Right click and select Paste under the User Token. See the next page for an image.
10. Click Save.



If you are on a Windows 7 computer, mark the checkbox “Alternate Security Protocol”.

B. How to automatically send balances to from Landlord 12 to RentTrack.

While in RentTrack Settings, there are three options for balances to be sent automatically.

1. *Send Balances After Posting Deposit Slip*. By marking this option, each time a deposit slip is posted (GL > Deposit Receipts), the balances will be sent.

2. *Automatically Send Balances After Posting Scheduled Receivables.* By marking this option, when Rent or Late Fees are posted under AR > Scheduled Receivables, the balances will be sent.

3. *Send Balances Automatically in the Background*: By marking this option, this means the balances will be sent in the background and no indication will appear on your screen that balances are being sent.

NOTES:

Balances for co-tenants are sent to RentTrack. The balance used is the balance for the Responsible Tenant if the checkbox “Post to Responsible Tenant” is marked in the tenant profile. To disable this function, mark the checkbox in the RentTrack Settings, as shown above, “Disable Co-Tenant Balance Copied from Responsible Tenant”.

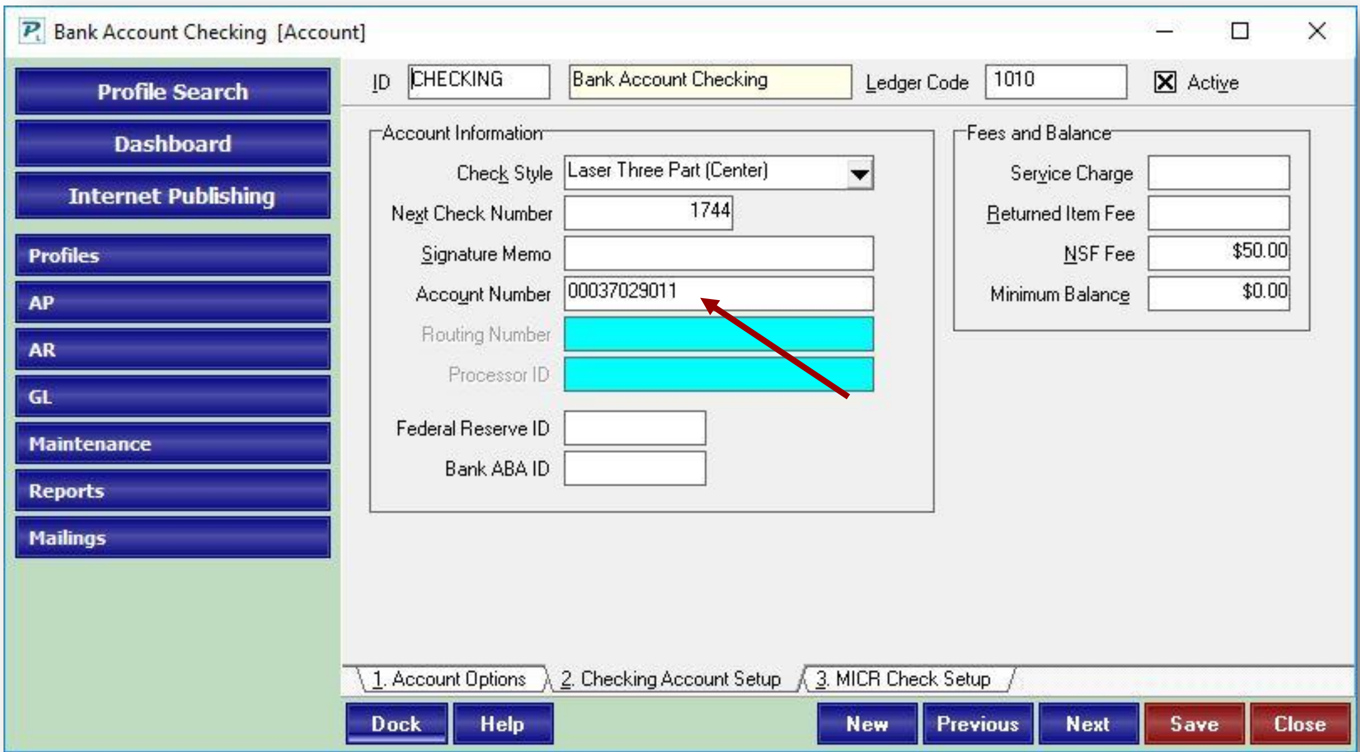
Exclude Disputed Charges from Reported Balance. Marking this checkbox will keep charges marked “Disputed” in AR, Tenant History from being sent to RentTrack.

Also see the information about Unit Address from the RentTrack Onboarding Process document as you add new units.

C. Verify that the bank account is properly identified in the Landlord 12 Account Code profile.

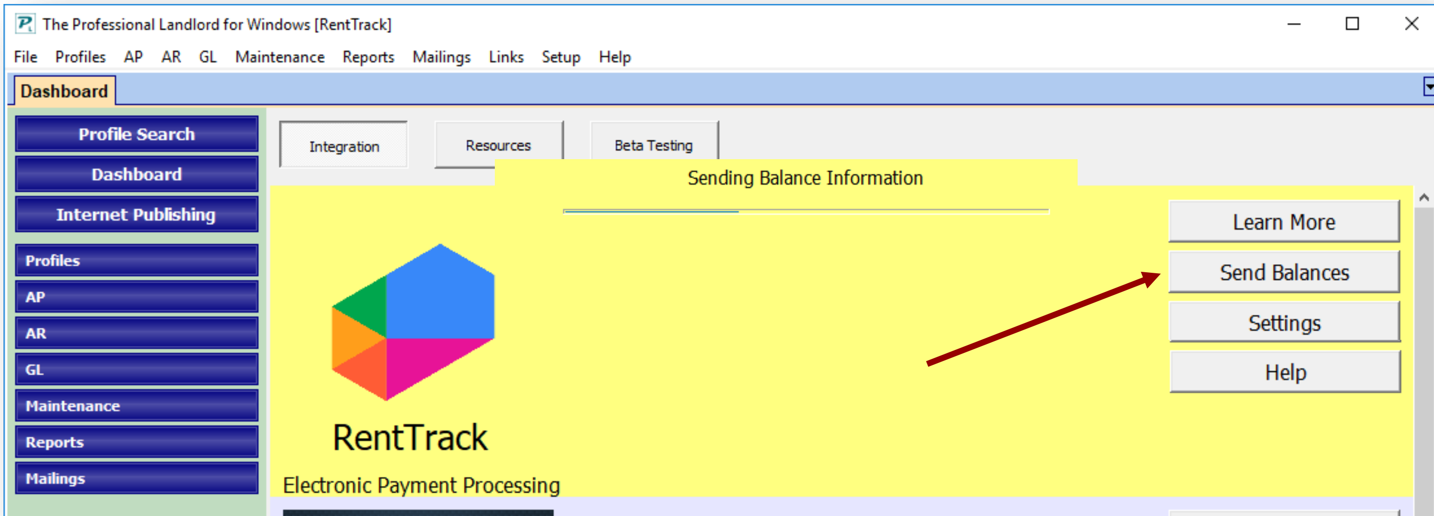
1. Go to Setup > Account Codes.
   If you aren't sure what your bank is called, go to GL > Bank Account History and use the flash light next to bank to see the names.
2. Find and double click on your Checking Account. This is the bank you use to collect rent money.
3. Go to Tab 2 Checking Account Setup.
4. Under Account Code, fill in your bank account number.

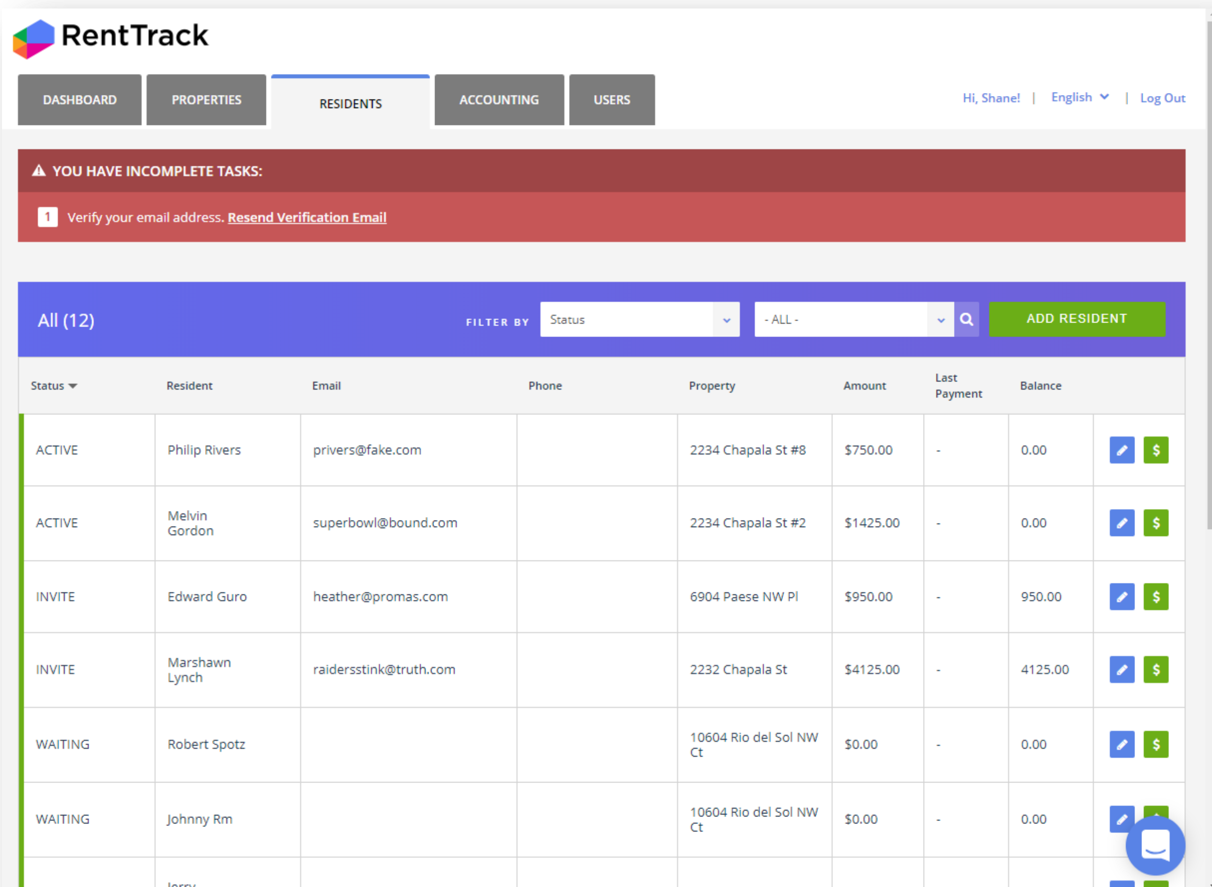
Your sync with RentTrack will not work properly if the bank account number is not filled in.



D. How to Manually Send Balances to RentTrack.

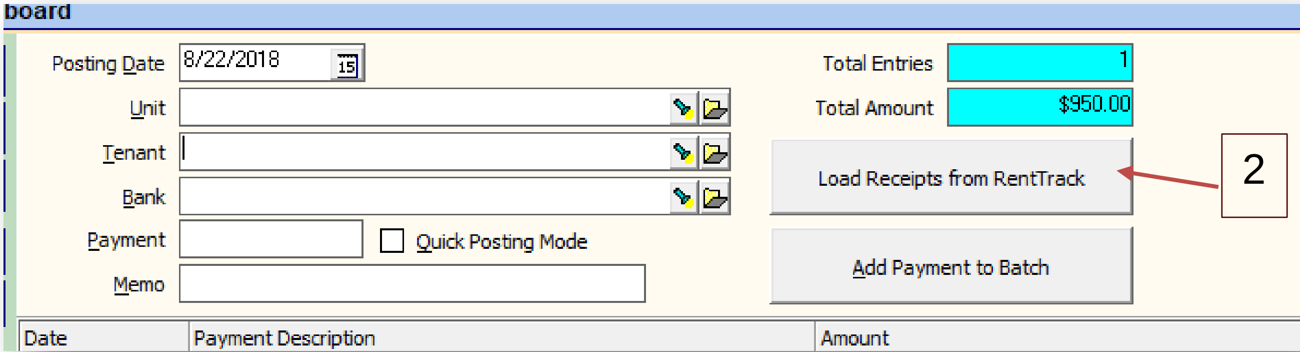
1. Open the Dashboard.
2. Click Send Balances in the RentTrack tile.

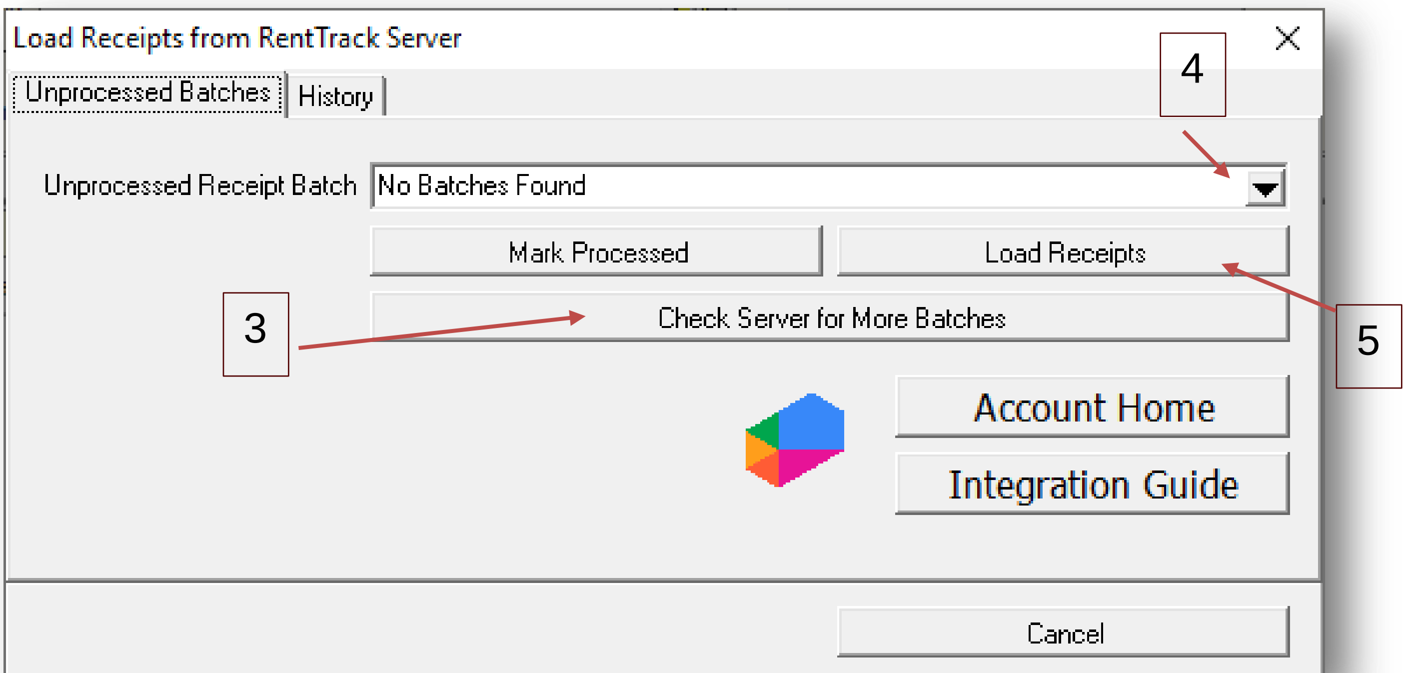




E. How to Load Receipts from RentTrack.

1. Go to AR > Batch Tenant Receipts.
2. Click Load Receipts from RentTrack.

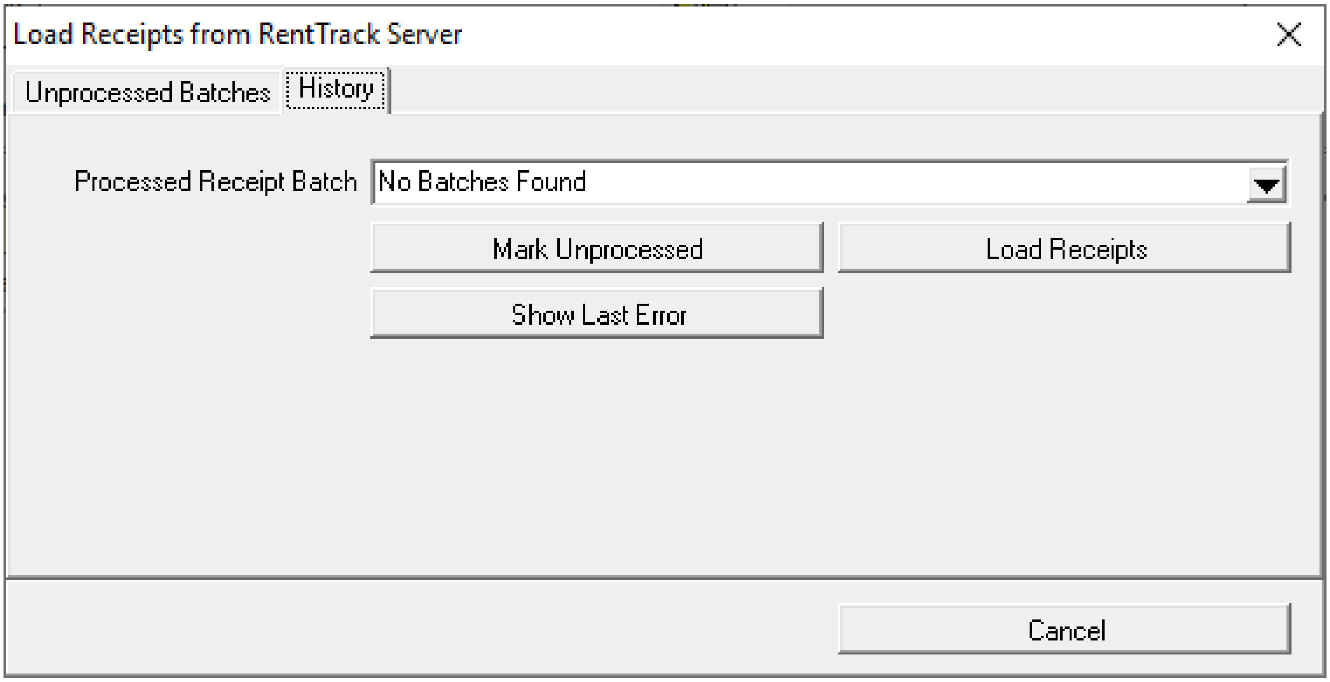




There are two tabs at top, Unprocessed Batches and History

3. Click Check Server for More Batches to check RentTrack for new receipt batches.
4. Use the drop down menu to select a batch under Unprocessed Receipt Batch.
5. Click Load Receipts.
6. Click OK on the message that appears about the number of receipts in the batch.
7. Follow normal batch receipt processing and verify the screen of receipts and click Post.

To review already processed receipts, click the History tab.



This screen gives you the ability to re-process receipts if needed by either marking a batch as unprocessed or by loading the receipts. From this screen you can also see the last error message you received. Note that if you load receipts that have already been processed for review purposes only that you should not attempt to repost them.

The system will import records from RentTrack if the system is unable to identify the payer. The receipts will show the RentTrack transaction id that is in the memo to assist in matching the payment to the correct payer. In addition, there is an option to process an unidentified payer as a ledger receipt to simplify the process of processing owner receipts that have been received through RentTrack until the integration can be expanded to natively handle owner payments