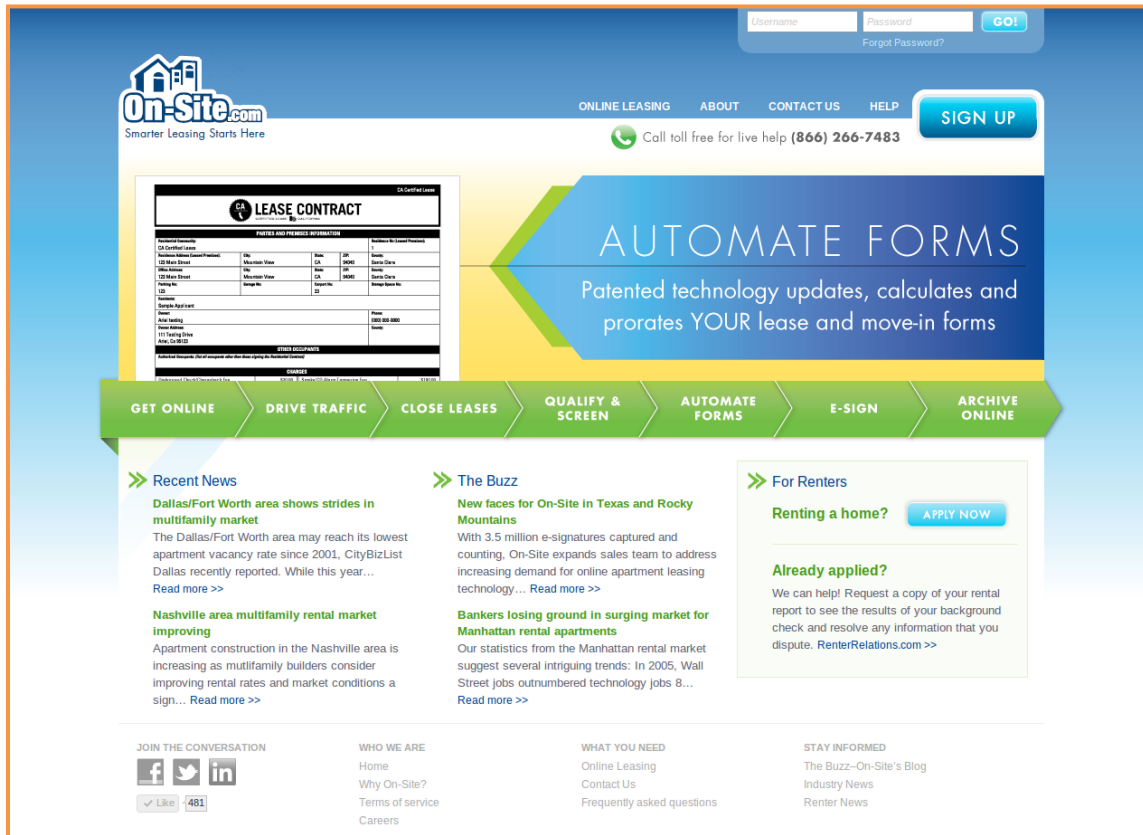


3 minute quick start guide



Log in to your account at <http://www.on-site.com>

- Enter your username and password and click **Go!** If prompted to change your password, select one with seven or more characters, including at least one number and one letter. If you're prompted to select and answer a secret question, then do so, as long as your email address is not shared.
- If you've forgotten your username or password click on the password link above the login box.



We're here to help.
Call **866 266 7483** or click the question mark in the upper right corner for instant support options.

The screenshot shows a software interface with a top navigation bar containing 'Leasing', 'Websites', 'Collections', 'Settings', and 'Reports'. Below this, there are several sections:

- Leasing:** Includes links for 'Begin New Guest Card', 'Recent Guest Cards', 'Begin Lease Renewal', and 'View Recent Leasing Activity'. It also shows a list of recent guest cards with columns for date and name (e.g., '1/18/2011 Chester Cheetah and Fred Flintstone (Dependant)').
- Advertising & Websites:** Includes links for 'Change Advertised Rents/Specials', 'Craigslist Postings', and 'Change Other Info/Advanced Options'.
- Tools:** Includes 'My Inbox' and 'Compose New Message'.
- Reports:** Includes a 'Rental Express' section with various report links like 'Application Fee Payment', 'Charges', 'Debt Collection Submission', etc.
- Settings:** Includes links for 'Company', 'Region', 'Property', 'Staff', and 'My Account'.

TIP... If you don't have guest cards enabled, click **Begin New Application** and skip to Step 4.

Step 1: Begin a new guest card

- Click **Leasing > Begin New Guest Card** if the guest is not yet entered into the system.
- Click **Leasing > Recent Guest Cards** to resume work on any existing guest card.
- Or Click **Leasing > Recent Leasing Activity** to resume work on any existing application.

The 'Guest Information' form includes the following sections:

- Community:** A dropdown menu currently set to 'Awesome Apartments'.
- Contact Type:** Radio buttons for 'Internet', 'Phone', and 'Visit'.
- Add guests, scan Guest I.D. card.** A button to initiate a scan.
- Guest(s) Table:** A table with columns: Guest(s), First Name, M.I., Last Name, Email, Phone, Spouse, and Remove. It contains one entry for 'Fred Flintstone'.
- Preferences (-):** A section with various dropdown and input fields:
 - Referral Source: Craigslist
 - Reason for Moving: Relocated for work
 - Desired Floorplan: Cool Place (1 - 1.0)
 - Desired Move-in Date: 03/01/2011
 - Desired Lease Term: one year
 - Price Range: \$1,100.01 - \$1,200.00
 - Comments: A text area for additional information.
- Status:** A dropdown menu currently set to 'Scheduled a future appointment with guest'.
- Buttons:** 'Save' and 'cancel' buttons at the bottom.

Optional information. Click **Preferences** to expand.

Enter any additional comments here.

Step 2: Enter the guest's information

- Choose your **Community** from the drop down menu. If you do not have access to the community you need, contact your supervisor.
- Choose the **Contact Type**. Was it an email (internet), phone call or office visit?
- Choose the **Guest Type** from the drop down menu.
- If applicable you can add a **Spouse** (Note that a spouse is an occupant who is responsible for rent).
- Enter a **Status** for the guest; e.g. "Guest was 'just looking'" or "Scheduled a future appointment with guest."

TIP... If you have a USB card scanner connected to your computer, you can click **scan Guest I.D. card** and scan the guest's driver license, state I.D. or credit card. The name fields will fill-in automatically. We'll also save the guest's address in the event that you convert the guest card into an application.

TIP... Referral Source, Reason for Moving and Status can all be customized under **Settings > Company > Guest Cards**.

TIP... If this guest card is a possible duplicate, you'll be asked if you want to **Combine** the guest cards. If they're not duplicates, click **Close**.

Community	Guests	Last Active	Match?	Agent	Apply
DINOSA	Fred J. Flintstone	2 days ago		Captain Hook	⬇
HILL	Phillip Mickelson	2 days ago	✓	Peter Pan	⬇
AMA	Test J. User	2 days ago		Ace AAce	⬇
HILL	Joe stone	2 days ago		-	-

Begin New Guest Card...

Step 3: Convert the guest card into an application

- Click **Leasing > Recent Guest Cards**.
- Click **Apply** to convert the guest card immediately or click the applicant's name to view/edit details of the guest card, then click **Convert to Application**.

Leasing: Guest Card

Guest Information

Community: * Dinosaur Alley

Contact Type: * Internet Phone Visit

Add guests, [scan Guest I.D. card](#).

Guest(s)	First Name	M.I.	Last Name	Email	Phone	Spouse	Remove
Individual	Fred	J	Flintstone	fred@fakemail	5555555555	+	✖
Individual						+	

Preferences (+)

Comments:

Status: * Scheduled a future appointment with guest

[Save](#) [Convert to Application](#) [cancel](#)

TIP... If you've received an online guest card, the name will appear in **bold** with a globe icon. Phone and in-person visits will have a cell phone icon and postcard icon respectively.

Select Community and Apartment

Community: Awesome Apartments

Apartment: Please select

This is a renewal lease.

Don't screen this applicant.

[Continue...](#) [cancel](#)

Step 4: Select an apartment

- Select an apartment from the drop down menu.
- Only if the applicant's chosen apartment is not listed, select **Add apartment...**, then click **Continue** and see Step 5.
- Check the **Don't screen this applicant** box if you are preparing a lease without screening the applicant first.

TIP... If you are preparing a lease renewal, check the **This is a renewal lease** box. However, renewals are simpler if you click **Leasing > Begin Lease Renewal**. This way, you can view expiring leases and process renewals with less typing.

TIP... If your applicant hasn't chosen an apartment yet, select **Decide later...**

Apartment Information

Community Name: Awesome Apartments

Apartment Number: *

Floorplan Style: * Choose Floorplan Style ▾

Bedrooms: * Select Bedrooms ▾

Bathrooms: * Select Bathrooms ▾

Square Footage: *

Floorplan Description: * Other

Floorplan Abbreviation: * Other

Street: * 12345 W. Cooltown Drive.

City, State: * Schdy , NY ▾

ZIP: * 12345

[Continue...](#) [cancel](#)

Step 5: Add a new apartment

- Use the drop down menu to view the existing **Floorplan Styles**. A **Floorplan Style** describes the type of layout that a set of apartments share; organize them however you like.

TIP... Only if none of the styles are appropriate for the unit, select **Create new floorplan style** and enter:

- Number of bedrooms & bathrooms
- Square footage of floorplan
- Description of the style e.g. "Santana"
- Abbreviation of the description e.g., "Santa"

TIP... Need to add a large quantity of apartments? We can upload apartments for you. Contact Client Services to obtain the required template, fill in the fields and email the completed template back to us.

New Applicant Information

Applicant Type: Individual Corporate Occupant Guarantor

[Scan Applicant's Card](#)

First Name: * Fred **M.I.:**

Last Name: * Flintstone **Suffix:** ▾

SSN Canadian ITIN None

* 999-99-9999

Driver's Lic. #: **State:** CA ▾

Date of Birth: * 5/10/1955

Phone: * (408)123-1231

Alternate Phone: (408)123-1232

Email Address:

This applicant has a spouse.

Include dependents.

Step 6: Enter the applicant's information

- Choose the **Applicant Type** and enter the requested information, or click **Add Existing Resident/Applicant** if the individual has been entered previously.
- If applicable check the box to add dependants or a spouse. A dependant is an occupant who is not financially responsible for the rent, while a spouse is an occupant who is responsible for the rent.
- If applicable, check the box to request that we verify the applicant's current/previous landlord and/or banking account(s).
- After clicking **Continue** enter employment/income information; if applicable, check the box to request that we verify this information.

TIP... If Canadian credit reports are enabled for your company you can request a Canadian credit report by clicking **Use a different I.D.** and entering the Canadian citizen's Social Insurance Number, province (at the bottom of the list of states) and Postal Code.

Payment Options for Fred Flintstone

- Bill the company
- Use applicant's bank account
- Use applicant's credit card

Accepted Cards:



Credit Card #:

Expiration Date:

Name on Card:

Billing Address:

City, State, Zip:

[Continue...](#)

Step 7: Enter payment information

- We can accept direct payment for your application fee via:
 - The applicant's credit card
 - The applicant's bank account
 - Your credit card

If your application fee exceeds our service fee, you are credited for the difference.

- If using a bank account, enter the routing and account numbers. If you have a paper check please write "void" on it and retain it for your records. There is no need to mail us the paper check.
- If you have already collected an application fee and/or you wish to be invoiced for the screening fee, click **Bill the company**.

Screen	Applicant	SSN	Birth Date	Monthly Income	Edit
<input checked="" type="checkbox"/>	Fred Flintstone	999-99-9999	5/10/1955	\$1,500.00	

[Add Applicant/Guarantor...](#)

Lease Terms

Rent:

Deposit:

Referred By:

Run Credit/Eviction History on Fred Flintstone.
 Run Criminal History on Fred Flintstone.
 The information above is correct. I have obtained **written authorization** to run screening report for **resident screening** and for no other purpose. I affirm that the **photo identification** of the applicant has been authenticated or that another verification process has been completed sufficient to **confirm the identity of the applicant**. I agree to On-Site.com's terms of service. I agree to provide the applicant with written copies of a "Receipt For Application Fee" and a "Notice of Requested Screening Reports" within three days of running this report.

[Continue...](#) [cancel](#)

Step 8: Screen the applicant

- Check that you have entered the applicant's information correctly. Click the edit pencil to make changes.
- Click **Add Applicant/Guarantor** to add a co-applicant now. You can always add them later.
- Enter the rent, security deposit and how the applicant was referred to your community.

- If applicable, select which level of screening to run by checking the appropriate boxes.
- Have you verified the applicant's photo identification? Have you received the applicant's permission to run a screening report? If so, check the box indicating these facts and click **Continue**.

Leasing | Settings | Reports | Support | Main Menu

Select Apartment > Applicant Info > Screening > Lease Terms > Finish

Overall Recommendation: APPROVE
 This application meets your requirements. On-Site's liability is strictly limited as put forth in the Terms of Service.

9.0 / 10

[Print All Screening...](#) [Recalculate](#)

Resident	Score	View Details	Passed	Failed	Pending
Fred Flintstone	9.0 / 10		<ul style="list-style-type: none"> Income to Rent Ratio Income after Debt Employment Verification Minimum Income Derogatory Credit Collections Bankruptcies Foreclosures Evictions Rental Verification 	• None	• None

[Continue...](#) [View Screening Details](#) [done](#)

Step 9: Review screening results

- Review the applicant's **Score** (from 0.0 to 10.0), the **Overall Recommendation** and the pass/fail scoring factors (all based on your requirements as set under **Screening Criteria**). If there are any factors "pending," the recommendation is not yet finalized.
 - Take care to review any warnings and verify the applicant's information as necessary.
- If you have permission, click on any factor or click **View Screening Details** to examine the details of the screening results. You may also **Print All Screening** if you would like to print out a hardcopy; however, please be careful to protect all sensitive information.

Leasing | Websites | Collections | Main Menu

Select Apartment > Applicant Info > Screening > Lease Terms > Finish

Lease Status: PENDING

[Approve](#) [Decline](#) [Cancel Application](#)

Overall Recommendation: APPROVE

[View Screening...](#)

9.0 / 10

Move-In/Application Documents [Print](#)

Online Application Form

Screening Adverse Action Notice

Receipt

The status must be approved before printing the lease.

No comments have been added.

Resident

Fred Flintstone [Edit](#) [Delete / Restore](#)

This application was received online.

[Add Applicant/Guarantor...](#)

Lease Agreement

Community: Awesome Apartments

Apartment: Not Set

Rent: \$1,200.00

Security Deposit: \$500.00

Lease Period: Not Set

[Select Apartment...](#) [Edit Lease Terms...](#)

Documents appear depending on the application's status – Denial Notice (if you reject the application, Adverse Action Notice (if you accept with conditions), Lease and All Addenda (if you accept), and Receipt for the application fees. Click the corresponding button to generate the ready-to-sign documents.

Change the terms of the lease.

Click the appropriate decision for the application: Decline to reject, Approve to accept, or Cancel if the applicant withdraws.

Add, edit or remove applicants.

Step 10: Navigate the Lease Details screen

[Select Apartment](#) > [Applicant Info](#) > [Screening](#) > [Lease Terms](#) > [Finish](#)

Lease Information

Resident(s): Fred Flintstone
Community: Awesome Apartments
Apartment: 28
Lease Start Date:
Lease Length:
Lease End Date: Adjust to end of month
Rent: *
Security Deposit: *
Additional Security Deposit:

Step 11: Edit the lease terms

- Enter the lease terms for the resident.
- Review the options specific to your community's lease paperwork, such as concessions and additional fees.
- Click **Continue** to generate the lease.

Date on Form:
 Name on Form:
[Recent leasing activity](#) | [Lease details](#)

Click on the icon below to print.

Fred Flintstone
123 Fake #28

RESIDENTIAL LEASE/RENTAL AGREEMENT
 DATED: NOVEMBER 9, 2010

A. VARIABLE LEASE TERMS:

RESIDENCE DESCRIPTION: <input type="checkbox"/> (If checked) A single family residence. <input checked="" type="checkbox"/> (If checked) Part of a multi-family residential complex			
UNIT NUMBER: 28	UNIT TYPE: Cool Place	UNIT ADDRESS: 123 Fake	
COUNTY: Santa Clara	CITY: San Jose	STATE: CA	ZIP: 95129
TERM:			
COMMENCEMENT DATE: 11/9/2010	<input type="checkbox"/> (If checked) Resident has been granted an EARLY TERMINATION OPTION . To exercise this option, Resident must pay an Early Termination Option Fee of _____ and give notice of Resident's election to exercise the option at least _____ days before the Early Termination Date. The Early Termination Date must be between _____ and _____.		<input checked="" type="checkbox"/> (If checked) After the Termination Date , this Agreement will continue on a month-to-month basis until terminated as specified elsewhere in this Agreement.
EARLY POSSESSION DATE:			
TERMINATION DATE: 10/31/2011			
RESIDENT(S):			
NAME (First, Middle Initial, Last): Fred Flintstone	NAME (First, Middle Initial, Last):	NAME (First, Middle Initial, Last):	

Step 12: Generate the lease

- Scroll and review the documents for accuracy.
- If you are printing leases to be signed on a different day, adjust the **Date on Form** accordingly and press enter.
- To print, click the printer icon. To save the file (to attach to an email for example), click the save icon.
- To make changes to the lease, click **Lease Details > Edit Lease Terms**.



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