



# QUICK START GUIDE

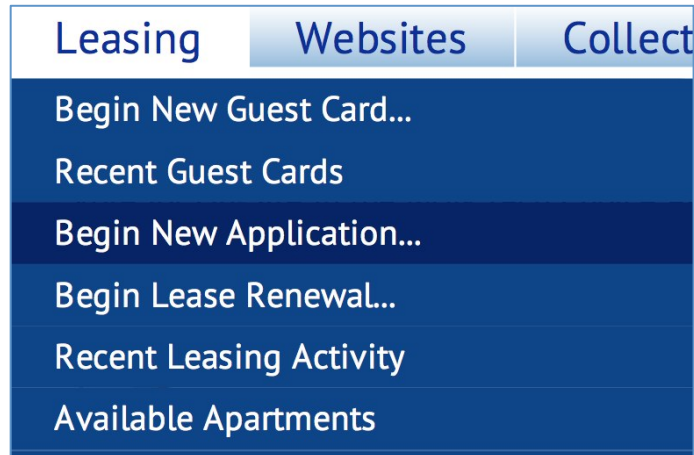
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## Creating an Application

To manually enter a new application, select *Begin New Application* from the *Leasing* menu.

To view an application that was created previously or one that was submitted online by a renter, select *Recent Leasing Activity* from the *Leasing* menu. See *Recent Leasing Activity* on page 19 and *Pricing & Availability* on page 18.



## Selecting an Apartment

After beginning a new application, select the appropriate community (if you have access to multiple communities), the appropriate building within the community (if applicable) and the applicant's chosen apartment.

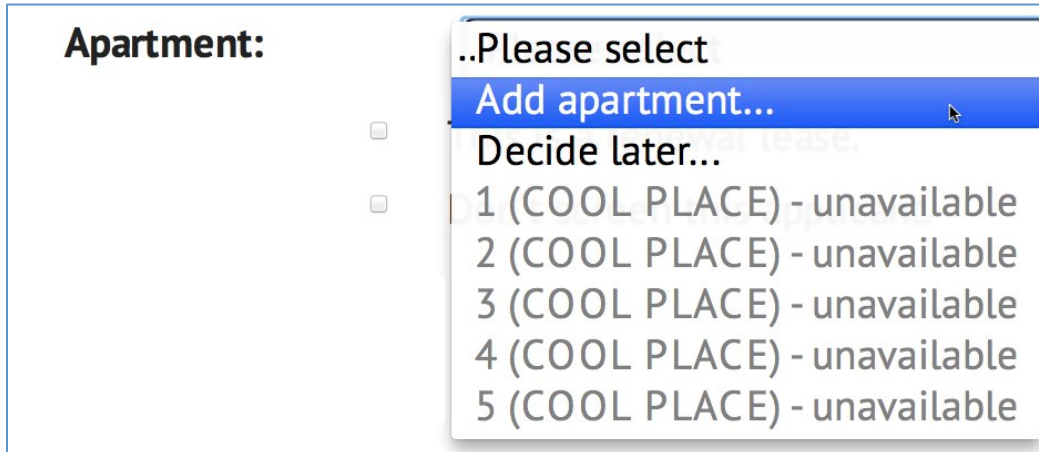
**Select Community and Apartment**

**Community:**

**Building:**

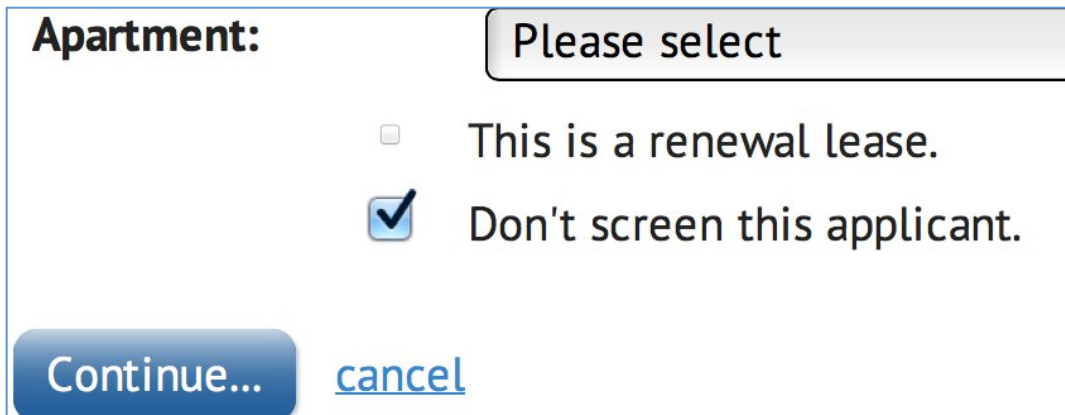
**Apartment:**

If the applicant's chosen apartment isn't listed, select *Add Apartment*. If the applicant hasn't chosen an apartment yet, select *Decide Later*.



The screenshot shows a form with the label "Apartment:" and two unchecked checkboxes. A dropdown menu is open, displaying the following options: "Please select", "Add apartment..." (highlighted in blue), "Decide later...", and five entries labeled "1 (COOL PLACE) - unavailable" through "5 (COOL PLACE) - unavailable".

Check *Don't Screen this Applicant* if you are preparing a lease before screening.



The screenshot shows a form with the label "Apartment:" and a dropdown menu set to "Please select". Below the dropdown are two checkboxes: "This is a renewal lease." (unchecked) and "Don't screen this applicant." (checked). At the bottom left is a blue button labeled "Continue..." and at the bottom right is a blue link labeled "cancel".

## Adding an Apartment

You can add an apartment by beginning a new application and selecting *Add Apartment* from the *Apartment* menu. Contact Client Services if you need to add a large volume of apartments for a lease up or newly acquired community.

Apartment Information	
Community Name:	Marketing Manor
Waitlist Unit:	* <input checked="" type="radio"/> No <input type="radio"/> Yes
Apartment Number:	* <input type="text" value="12"/>
Floorplan Style:	* <input type="text" value="Cool Place (1 - 1)"/>
Bedrooms:	* <input type="text" value="One"/>
Bathrooms:	* <input type="text" value="1"/>
Square Footage:	* <input type="text" value="500"/>
Floorplan Description:	* <input type="text" value="Cool Place"/>
Floorplan Abbreviation:	* <input type="text" value="COOL PLACE"/>
Street:	* <input type="text" value="307 Orchard City Drive, Suite 110"/>
City, State:	* <input type="text" value="Campbell"/> , <input type="text" value="CA"/>
ZIP:	* <input type="text" value="95008"/>

When selecting a *Floorplan Style*, note that a *Floorplan Style* is used to classify groups of apartments with certain traits in common, e.g. all of your one-bedroom apartments could be grouped under one floorplan style and all your two-bedrooms under another.

If the appropriate floorplan style isn't listed, select *Create New Floorplan Style*.

## New Applicant Information

After selecting an apartment, you'll be taken to the *New Applicant Information* page. Use this page to enter the applicant's personal information, current address and income.

### New Applicant Information

**Applicant Type:**  Individual  Corporate  Occupant  Guarantor

[Scan Applicant's Card](#)

**First Name:** \* Mickey **M.I.:** G

**Last Name:** \* Masters **Suffix:**

**Social Security #:** \* 999-99-9999 [Use a different I.D.](#)

**Driver's Lic. #:** B123456789 **State:** CA

**Date of Birth:** \* 11/15/1977

**Phone:** \* (408)555-1231

**Alternate Phone:** (408)555-1232

**Email Address:** \* mickey@jakowski.com

**Income:** \* \$0.00  per Year

When selecting an *Applicant Type* keep in mind:

- An *Individual* is anyone that will be physically living in the apartment and responsible for rent.
- A *Corporate* applicant type refers to the business that will be responsible for rent on a corporate lease.
- An *Occupant* is a minor or adult that will be physically living in the apartment, but is not responsible for rent. Different screening guidelines may apply.
- A *Guarantor* is an adult that is not physically living in the apartment, but is responsible for rent if the resident defaults. Different screening guidelines may apply.

## New Applicant Information

**Applicant Type:**  Individual  Corporate  Occupant  Guarantor

If your applicant doesn't have a Social Security Number (SSN), click *Use a Different ID*.

**Social Security #:** \* 999-99-9999 [Use a different I.D.](#)

If applicable, you can enter the applicant's Individual Taxpayer Identification Number (ITIN) or Canadian Social Insurance Number. Otherwise, click *None*.

## Paying the Application Fee


After entering the applicant's information, you'll need to submit payment for the application fee. On-Site can accept direct payment for your application fee via your credit card, the applicant's credit card or the applicant's bank account. If you've already collected an application fee you can click *Bill the Company* to be invoiced for the screening fee.

### Payment Options for Donald C. Earwig

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

## Screening the Applicant

After entering the applicant's information and paying the application fee, you'll be taken to the *Screening* page. Verify that you've entered the applicant's information correctly and, if necessary, click the pencil to make changes.

Screen	Applicant	SSN	Birth Date	Annual Income	Edit
<input checked="" type="checkbox"/>	Casper Z. Kurtner	999-99-9999	2/6/1923	\$100,000.00	

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

Enter the lease terms and specify the referral source.

### Lease Terms

**Rent:** \*

**Deposit:** \*


**Referred By:** \*

If applicable, check the level of screening to run and confirm that you are authorized to screen the applicant.

- Run Credit History on Casper Z. Kurtner.
- Run Landlord Tenant Court History on Casper Z. Kurtner.
- Run Criminal History on Casper Z. Kurtner.
- The information above is correct. I have obtained **written authorization** to run screening report for **resident screening**

## Reviewing the Screening Results

Review the applicant's score and overall recommendation.



**9.0 / 10**

### Overall Recommendation: APPROVE

This application meets your requirements. The Overall Recommendation was derived solely from your community's leasing criteria. On-Site makes no independent assessment of an applicant's qualifications.

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

Review the pass or fail scoring factors. Click any factor to review the details of that particular factor. If there are any factors pending, the overall recommendation will not be finalized.

Passed	Failed
<ul style="list-style-type: none"><li>▪ <a href="#">Income to Rent Ratio</a></li><li>▪ <a href="#">Income after Debt</a></li><li>▪ <a href="#">Derogatory Credit</a></li><li>▪ <a href="#">Collections</a></li><li>▪ <a href="#">Bankruptcies</a></li><li>▪ <a href="#">Foreclosures</a></li><li>▪ <a href="#">Mortgages in Default</a></li><li>▪ <a href="#">Landlord Tenant Court</a></li></ul>	<ul style="list-style-type: none"><li>▪ None</li></ul>

Review any warnings and take action as necessary.



### warnings

[what's this?](#)

APPLICANT: Submitted Address Not On Credit Report - ACTION REQUIRED (Experian)

APPLICANT: Submitted Address Not In Records - ACTION REQUIRED (Experian)

APPLICANT: Invalid SSN



If you have permission, click on *View Screening Details* to view the complete rental report.

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

## Lease Details

### Making Your Decision to Rent

Once you've reviewed the screening results, use the *Lease Details* page to make your decision to rent: *Approve*, *Decline* or *Cancel Application*. You can get to the *Lease Details* page at any time by selecting *Recent Leasing Activity* from the *Leasing* menu and clicking the name of the appropriate renter. See *Recent Leasing Activity* on page 19.


**Lease Status: PENDING**

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

Click *View Screening* to go back and review the screening results.

**Overall Recommendation: APPROVE**





[View Screening...](#)

 9.2 / 10

### Viewing and Printing Documents

Lease documents appear under the *Documents* section. View and print documents by clicking the printer. See *Generating and E-signing Lease Documents* on page 13.

**Documents**

- Move-In/Application Documents
  - Lease and all Addenda** 
  - Online Application Standard 
  - Screening Adverse Action Notice 
  - Receipt 



### Editing Applicants

Use the *Resident* section to edit the applicant's information, add an applicant or guarantor to the lease or delete an applicant or guarantor. See *Adding Applicants and Guarantors* on page 12.

Note that substantially changing the applicant's information after screening has already been completed may require you to screen the applicant again at additional cost.

Resident	Edit	Delete / Restore
Jordan Griffin		
<a href="#">Add Applicant/Guarantor...</a>		


### Editing Lease Terms

Use the *Lease Agreement* section to change the applicant's apartment or edit the lease terms.

Lease Agreement	
<b>Community:</b>	Marketing Manor
<b>Apartment:</b>	12
<b>Apartment Available:</b>	Now
<b>Rent:</b>	\$2,000.00
<b>Security Deposit:</b>	\$2,000.00
<b>Lease Period:</b>	<i>Not Set</i>
<a href="#">Change Apartment...</a> <a href="#">Edit Lease Terms...</a>	

## Lease Comments
















Review lease comments and add new ones using the *Comments* section. Lease comments appear only to your leasing staff and do not appear on the lease documents.

Comments		Edit
6/12/2013 11:09 AM PDT	Application fees for Jordan Griffin in the amount of \$25.00 were paid by credit card.	
<a href="#">Add Comment...</a> <a href="#">done</a>		














## Completing Verifications

If you use On-Site's reference check service, you can use the *Lease Details* page to send comments and verification related documents to the reference check team.

To fax a verification document, print the *Verification Document Fax Cover Sheet* and fax the document with cover sheet to (877) 329-6674.

Documents	
 Move-In/Application Documents	
 Agreement to Execute Rental Agreement	
 Online Rental Application	
 Utilities Set-Up and Transfer Agreement	
 Screening Adverse Action Notice	
 Receipt	
 Verification Documents Fax Cover Sheet	
 Verification Documents	 FILE
THIS FOLDER IS EMPTY...	

To upload a verification document, click add on the *Verification Documents* folder.

 Verification Documents		 FILE
 Fax #1 (6677707-#226Jesusrelease.jpg)		6/11/2013
 Fax #2 (6677707-226Jesuspaystub2.jpg)		6/11/2013
 Fax #3 (6677707-226Jesuspaystub.jpg)		6/11/2013
 Fax #4 (6677707-#226paystubs2.jpg)		6/10/2013
 Fax #5 (6677707-#226paystubs1.jpg)		6/10/2013
 Fax #6 (6677707-#226release.jpg)		6/10/2013

Verification documents can also be emailed to [verifications@on-site.com](mailto:verifications@on-site.com).

To send a comment to the reference check team, click *Add Verification Comment* under the *Verification Comments* section. Comments entered here do not appear on the lease documents.

Verification Comments		
6/12/2013 2:15 PM PDT	Adriana Anderson	Applicant's want to move in ASAP!
6/12/2013 12:04 PM PDT	Adriana Anderson	UPLOADED DANIELS PROOF OF INCOME AND BOTH INFORMATION RELEASES 6/12/2013

[Add Verification Comment...](#) [done](#)

Comments and status updates from On-Site's reference check team appear on the *Screening Details* page.

To get to the *Screening Details* page, click *View Screening*.

**Overall Recommendation: APPROVE**

[View Screening...](#)

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Click *View Screening Details*.

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

Comments appear under the *Verifications* section.

**Comments From On-Site.com**  
6/10 3:31 PM PST (SKE) - Verbally verified correct.

If action is needed from your leasing staff to complete a reference check, a notification will appear on the *Recent Leasing Activity* page. See *Recent Leasing Activity* on page 19.

**The verifications on this report have been delayed because:**

Waiting for response on rental verification for Allyson M. Johnson

Need authorization form for Allyson M. Johnson – please fax to (877) FAX-ONSITE (877-329-6674)

Need additional information for [Allyson M. Johnson](#): *Please provide current pay stubs 1 month May*

**Adding Applicants and Guarantors**

To add an applicant or guarantor, click *Add Applicant/Guarantor*.

Resident	Edit	Delete / Restore
Jordan Griffin		
<a href="#">Add Applicant/Guarantor...</a>		

Enter the new applicant or guarantor’s information.

If the applicant or guarantor that you are adding already exists within On-Site on a different lease, click *Add Existing Resident/Applicant*.

[Add Existing Resident/Applicant](#)

**New Applicant Information**

**Applicant Type:**       Individual       Corporate

Use the search box to find the applicant or guarantor and click the person's name.

Add	Resident
	Ken H. Kurtner
	Casper Z. Kurtner

If the terms of the lease are changing, be sure to click *Edit Lease Terms* on the *Lease Details* page and edit the terms accordingly.

If the new applicant is replacing an existing applicant, be sure to remove the old applicant by clicking the trashcan next to the old applicant's name prior to printing the new lease documents.

Resident	Edit	Delete / Restore
Ken H. Kurtner		
Jordan Griffin		
Donald P. Griffin	-	

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

Note that the overall score and recommendation for the lease will change once you've screened the new applicant/guarantor.






## Generating and E-signing Lease Documents

### Generating Lease Documents

To generate a lease, first navigate to the *Lease Details* page for the lease that you want to generate by selecting *Recent Leasing Activity* from the *Leasing* menu and clicking the name of the appropriate resident. See *Recent Leasing Activity* on page 19.


Print the *Lease and All Addenda*.

**Documents**

- Move-In/Application Documents
  - Lease and all Addenda**   E-SIGN 
  - Holding Deposit 
  - Screening Adverse Action Notice 

Use the *Name on Form* menu to change the name of the agent countersigning the lease.

**Date on Form:**

**Name on Form:**  

\_\_\_\_\_  
Charlie Tuna (*Owner/Agent*) *Date*

If you need to make changes to the lease documents, click *Lease Details* and then click *Edit Lease Terms*. See *Editing Lease Terms* on page 9.

**Name on Form:**  

[Recent leasing activity](#) | [Lease details](#)

### E-signing Lease Documents

Once your lease documents are generated and ready to be signed, click *Sign Document*.

**Casper Z. Kurtner** 307 Orchard City Drive, Suite 110 #12

[Sign Document](#)



Check the appropriate boxes to indicate which signers are present and which signers to invite by email, i.e. those that will sign remotely.

Corporate renters and renters with no ID number of any kind are assigned a unique PIN when you send the email invite. The PIN is used in place of an ID number to verify the renter's identity and should be given to the renter over the phone.

Present	Invite By Email	Name	Email Address	PIN
<input type="checkbox"/>	<input type="checkbox"/>	Charlie Tuna		
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Casper Z. Kurtner	<input type="text" value="casper@kurtner.com"/>	

[cancel](#)

The email invitation for renters signing remotely includes a link, which will take them to their lease documents. Signers are required to enter the last four digits of their SSN, Canadian social insurance number, tax ID number or the unique PIN that was assigned to them when you sent the invite.

Awesome Apartments would like to invite you to sign your Lease online. Signing digitally is a convenient and environmentally friendly way to complete your agreement paperwork.

Prior to signing, you will be asked to complete a quick verification of your identity. After you have signed, you can print your own copy of everything you have signed. If you are ready, you may [start signing now](#).

Thank you for selecting Awesome Apartments. Please call (650) 934-████ with any questions you may have.

From the team at On-Site.com  
Smarter Leasing Starts Here.

Once the signing ceremony has begun, scroll through each page of the lease document to mark the pages as viewed.

Page 16 of 16

**70. DAMAGES FOR FAILURE TO VACATE.** If you fail to completely vacate the Residence when required, you will be responsible for the resulting losses suffered by us including but not limited to, future resident losses, lost Rent, legal costs and other expenses.

**71. ATTORNEY FEES.** In any legal action brought by either party to enforce the terms of this Agreement or relating to the Agreement, the prevailing party will be entitled to all costs incurred in connection with that action, including reasonable attorney fees. If an Attorney Fee Cap is specified in the Variable Lease Term section, attorney's fees awarded by a court may not exceed that amount. We warrant to reasonable attorneys' fees and all other costs incurred preparing and serving notices to you (and/or consultations with attorneys in connection with preparing and serving notices), whether or not legal action is brought in connection with the default. Additionally, you shall pay all collection-agency fees that we incur if you fail to pay all sums due within 10 days after we mail you your statement of account or other demand for payment.

**H. AGREEMENT INTERPRETATION:**

**72. AMENDMENT.** This Agreement may not be amended or altered except by a written agreement, signed by you and us.

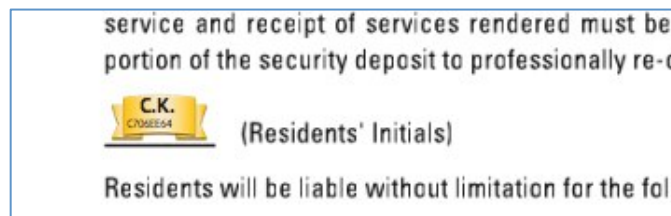
**73. CONSTRUCTION.** The singular form will include plural, and visa versa. This Agreement will not be construed as if it had been prepared by one of the parties, but rather as if both parties have prepared it.



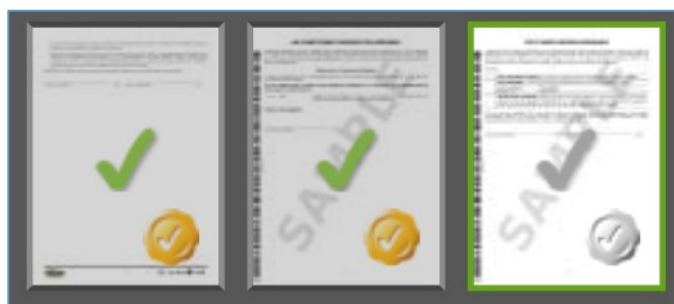
Click on each signature and initial blank and use the menu to sign by hand or by click. If you choose to sign by hand, you can use your mouse or touchscreen device to draw actual signatures onto lease documents.







If you choose to sign by click, you can sign lease documents with a single click of your mouse. Neither method of signing is better than the other, nor does one method offer increased legal legitimacy—it's just a matter of preference.




The symbols that appear on the page thumbnails denote the signing status.







	The page has been partially viewed
	The page has been viewed
	The page contains an unsigned signature or initial block
	The page contains a completed signature or initial block


If you fail to complete the lease signing, you can return to the signing page at any time by navigating to the appropriate *Lease Details* page and clicking the *E-Sign* seal on the *Lease and All Addenda*.


**Documents**


 Move-In/Application Documents


 **Lease and all Addenda**


 E-SIGN
 




 Holding Deposit
 



 Screening Adverse Action Notice
 



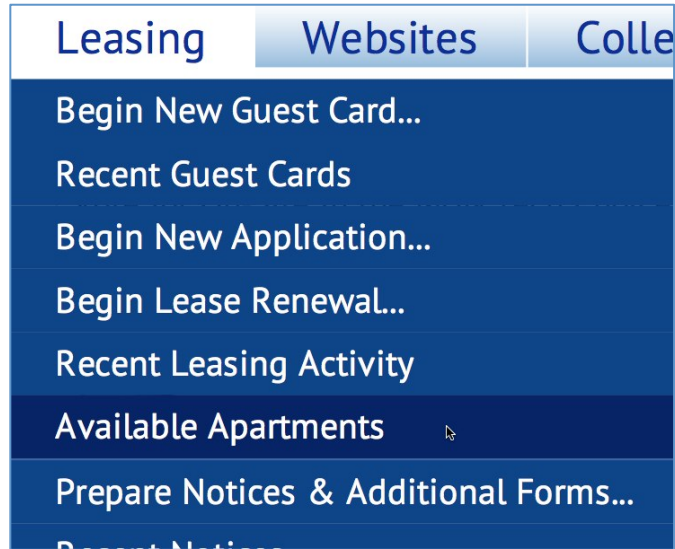
The seal denotes the progress of the signing ceremony.

	Lease documents have been generated but not signed
	Lease documents have been signed by the renter
	Lease documents have been signed by the renter and countersigned by an agent

## Pricing & Availability

If you accept applications online and allow your applicants to apply to specific apartments, you'll need to set your apartment pricing and availability.

To do so, select *Available Apartments* from the *Leasing* menu.

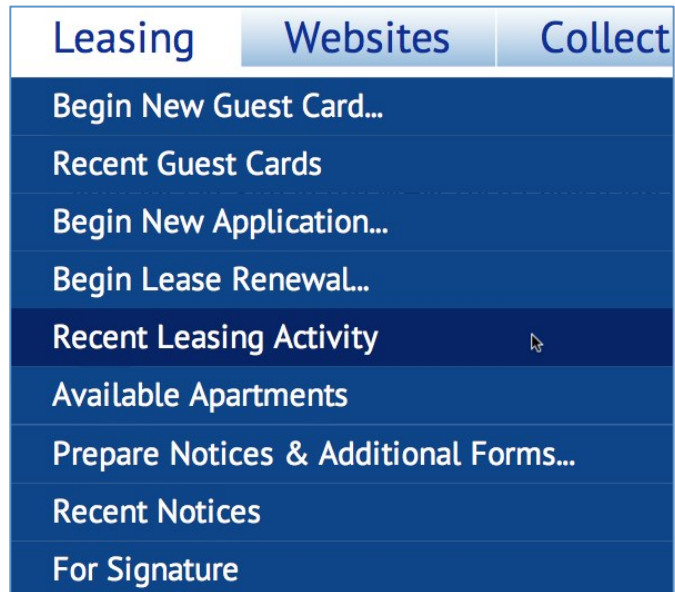


From the *Available Apartments* page, you can set availability, pricing, lease terms, specials and show or hide apartments.

<input type="checkbox"/>	Apt.	On Hold	Floorplan	Date Available	Rent	Security Deposit	Minimum Term Mos.	Description		Show Online	Special
<input type="checkbox"/>	2		Cool Place	-	\$1,200	\$500	12	This is where you can enter a description.		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/>	3		Cool Place	-	\$1,000	\$500	12	Apply now and get first month's rent free!		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/>	4		Cool Place	-	\$900	\$400	24			<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	5		Cool Place	-	\$900	\$400	24			<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	12		2 Bed / 1 Bath, 1000 sq. ft.	06/11/2013						<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	1		Cool Place	-	\$0	\$0				<input checked="" type="checkbox"/>	<input type="checkbox"/>

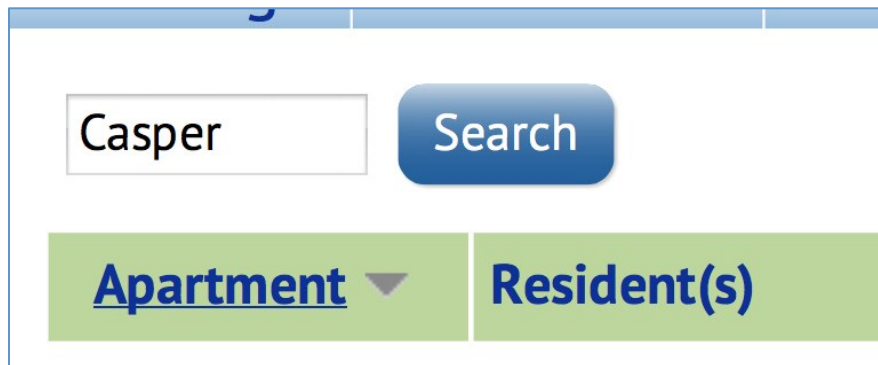
## Recent Leasing Activity

To view a pre-existing application or one that a renter has submitted online, select *Recent Leasing Activity* from the *Leasing* menu.



The *Recent Leasing Activity* page gives you an at-a-glance view of all your recent leases, both those that were created manually by leasing agents and those that were submitted online by renters.

Use the search box to find leases. You can search by apartment number or renter name.



Filter results using the menus.



Click the resident's name or the magnifying glass to view the *Lease Details* page.

Apartment ▼		Resident(s)	Date ▲
12	MM	<a href="#">Jordan Griffin</a> <a href="#">Donald P. Griffin</a>	06/12/2013

Use the *Status* menu to quickly change the status and make a decision to rent. To help ensure accurate reporting, update the lease status immediately as the lease moves through the leasing workflow.

<b>Pending</b>	A lease in which a decision to cancel, reject or approve the renter's application has not yet been made.
<b>Canceled</b>	A lease in which the renter's application has been withdrawn.
<b>Approved</b>	A lease in which the renter's application has been approved for move-in.
<b>Rejected</b>	A lease in which the renter's application was rejected due to a failure to meet your rental qualifications.
<b>Incomplete</b>	A system-only lease status for incomplete online applications.
<b>Closed</b>	An approved lease in which no more action is necessary.