

- This guide is a general overview of your Customer Portal, Knowledge Center & Support for ResMan.

- Access all the support and answers you need for your ResMan property management system in the Knowledge Center.

- The ResMan Knowledge Center is your first point of contact for any questions, issues, or ResMan support you need. From your website, payments, integrations, billing, leasing, and more within the ResMan platform, this is where you will start!
- Do not delay receiving assistance when you need it. The Knowledge Center is the fastest and most effective way to receive help.

**\*IMPORTANT: Your residents will not be able to receive support from ResMan directly and should not contact ResMan when experiencing issues. The property must contact ResMan through the Knowledge Center to receive assistance for a resident account.\***



# ResMan®

## Knowledge Center Access

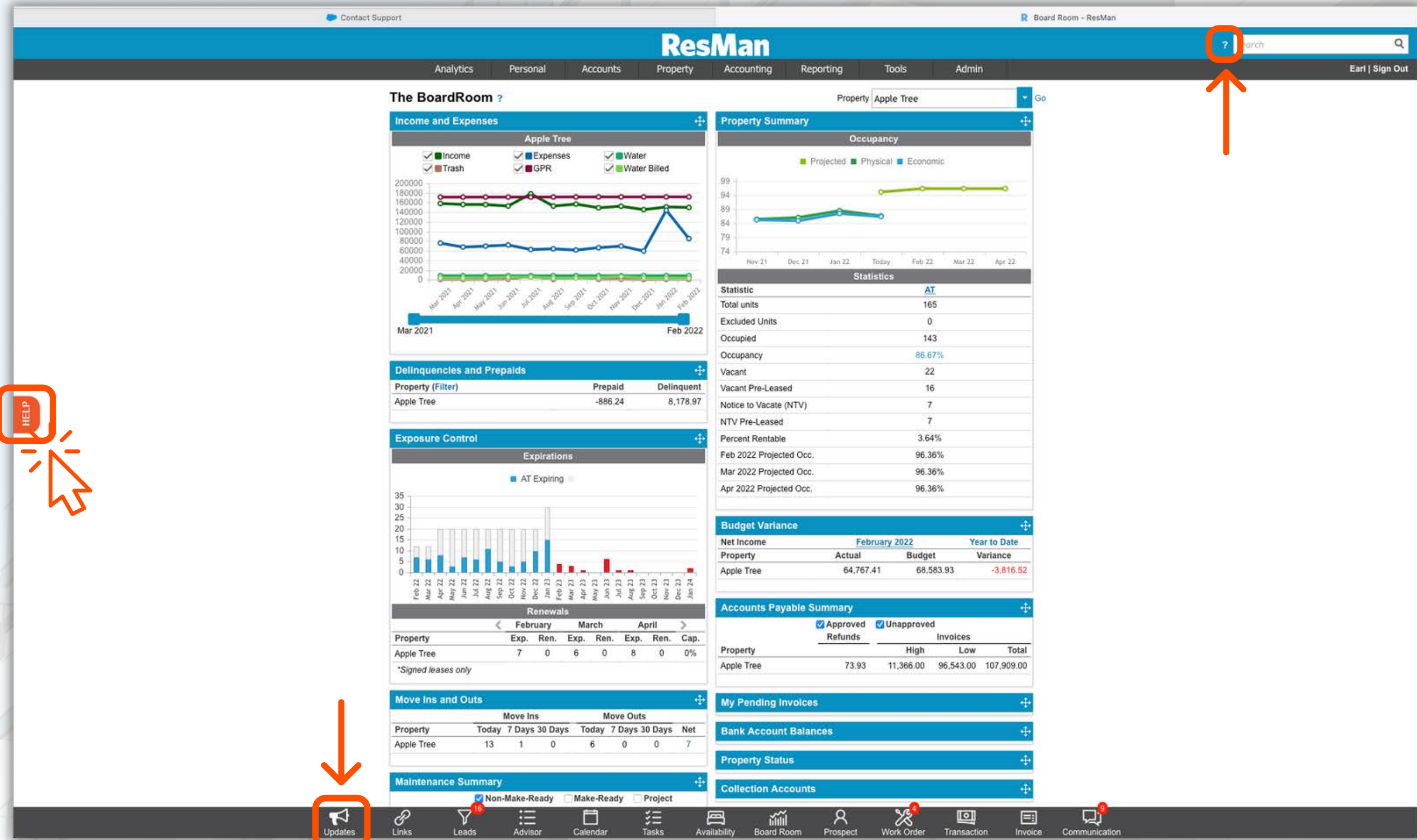
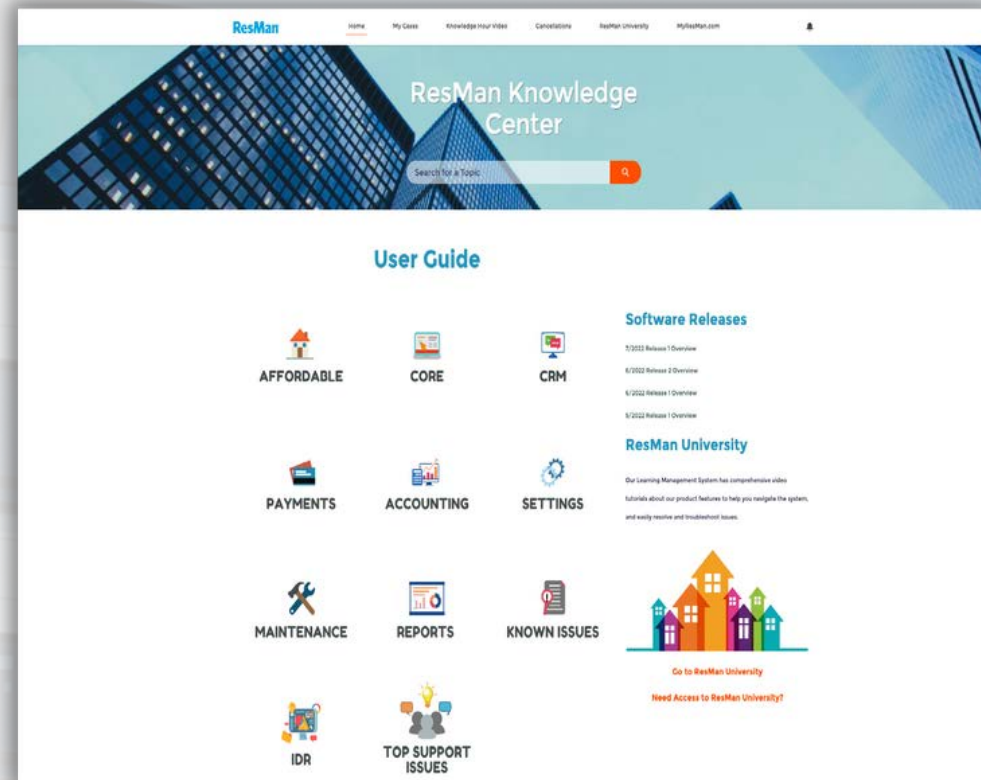
# ResMan Knowledge Center

## Quick Start Guide

There are many ways to access your ResMan Knowledge Center:

- Login to your ResMan platform and click the orange **"Help"** button to the left of **"The Boardroom"** page. It will redirect you to the Knowledge Center page below.
- Once signed-in on ResMan, you can select the **"Updates"** icon on the efficiency ribbon to lead you to the Knowledge Center below.
- You can select the **"?"** at the top right of "The Boardroom" page to access the Knowledge Center below.

Review the location of each access point to the Knowledge Center from the ResMan platform in the preview to the right. →





# ResMan®

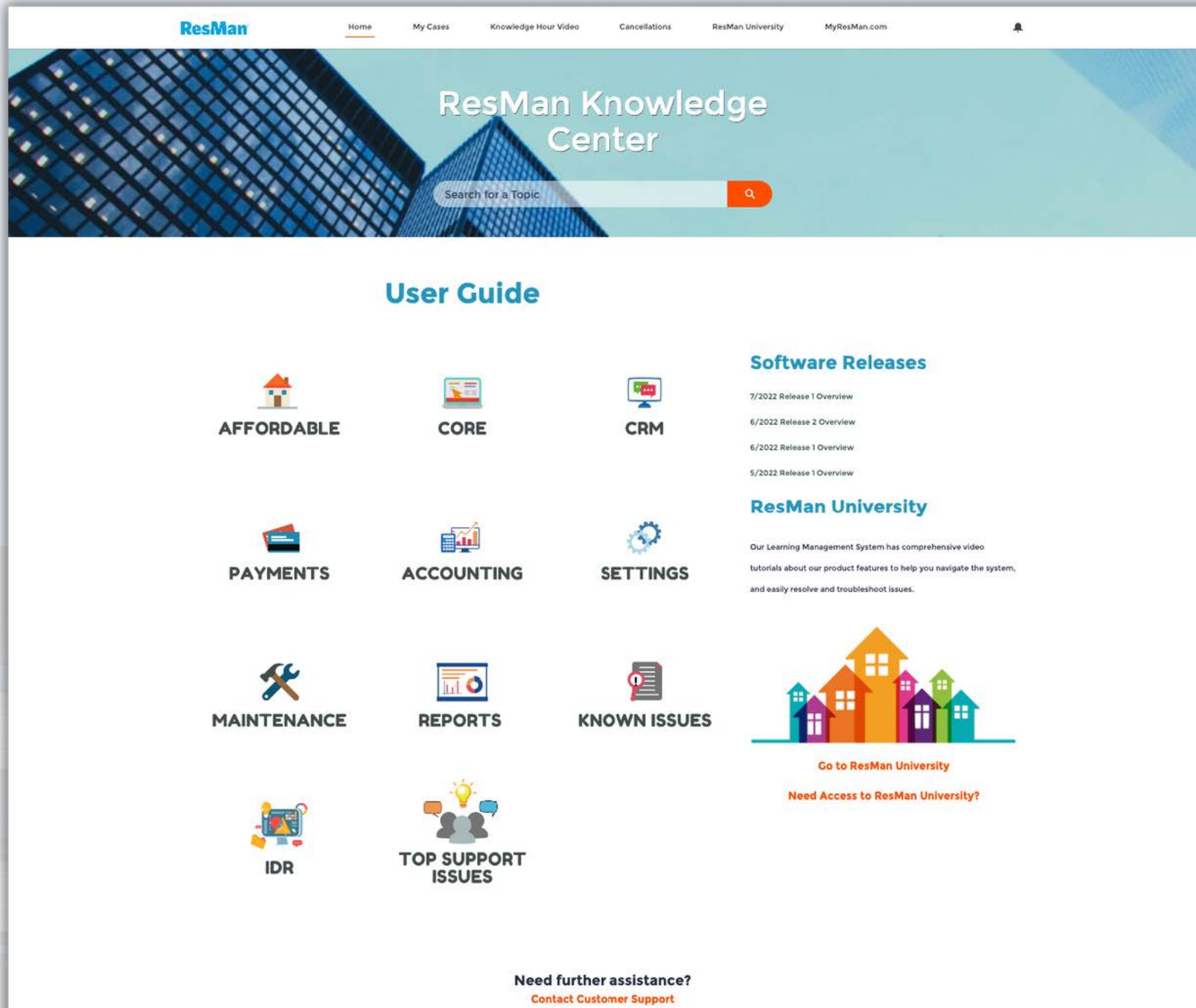
## Knowledge Center Access

# ResMan Knowledge Center

## Quick Start Guide

Once you have accessed the ResMan Knowledge Center, the ResMan world is your oyster!

- Access general or specific help articles for an array of topics and utilize the **spotlight search** function
- See **product releases and notes** in real-time
- View "**Known Issues**" within the ResMan Platform (we're working on it!)
- Submit, edit, and track **support cases**
- Live chat with a **ResMan General Support Team** member about anything ResMan
- Direct access to "**ResMan University**" training platform
- Access to client specific "**Knowledge Hour**" webinars with our training team helping guide you through the ResMan platform





Your user guide is the home of all the information, articles, and support you need to operate in ResMan

### User Guide



AFFORDABLE



CORE



CRM



PAYMENTS



ACCOUNTING



SETTINGS



MAINTENANCE



REPORTS



KNOWN ISSUES



IDR



TOP SUPPORT  
ISSUES

- By clicking each section, it will open a treasure of information relating to each feature presented, questions, answers, updates, and how-to guides.

▼ Affordable

▼ [How to View Insurance Reports](#)  
When you have enabled insurance in your property and wants to view the insurance reports in ResMan.

▼ [Annual Recertification Report](#)  
This user guide will show how to generate the Annual Recertification Report in ResMan.

▼ Bank Accounts

▼ [Bank Deposit Register Report](#)  
This report lists all deposit batches that are recorded in the Bank Account selected for the date range selected. Batches that have cleared the bank, will be indicated. It breaks down the money received into Payments (non-deposit funds) and Deposits. If there were any NSF's, that will be indicated in a section at the bottom. Note: This report is the equivalent of going to Accounting → Bank Accounts and selecting the same bank account and the same date range (for deposit batch transactions only).

▼ [Bank Account Register Report](#)  
This report lists all transactions recorded in the selected bank account for a specific accounting period or date range. The transactions listed on the report may include: Resident payments, deposits and reversals Checks paid and voided New vendor payments and voids Journal Entries (that impact cash) New Transactions For clients using our online payment option (Aptexx); If a payment is recorded on the resident's ledger on the 30th, but is not batched (and deposited) until the 1st, that transaction will not show up on any Bank Account report until the 1st.

- We know that sometimes there are roadblocks to success. Stay updated with the "**Known Issues**" section so you know we're working on it.

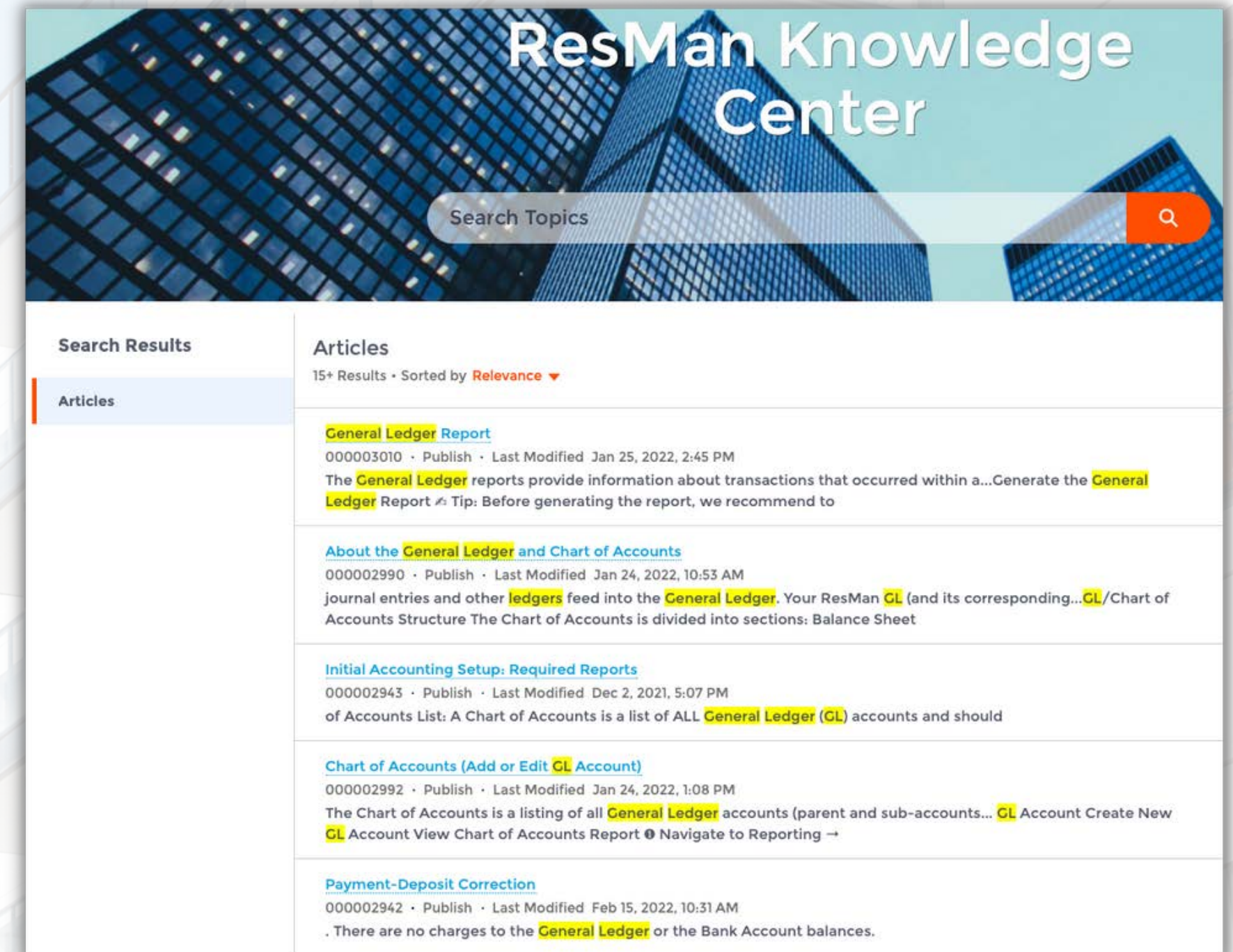
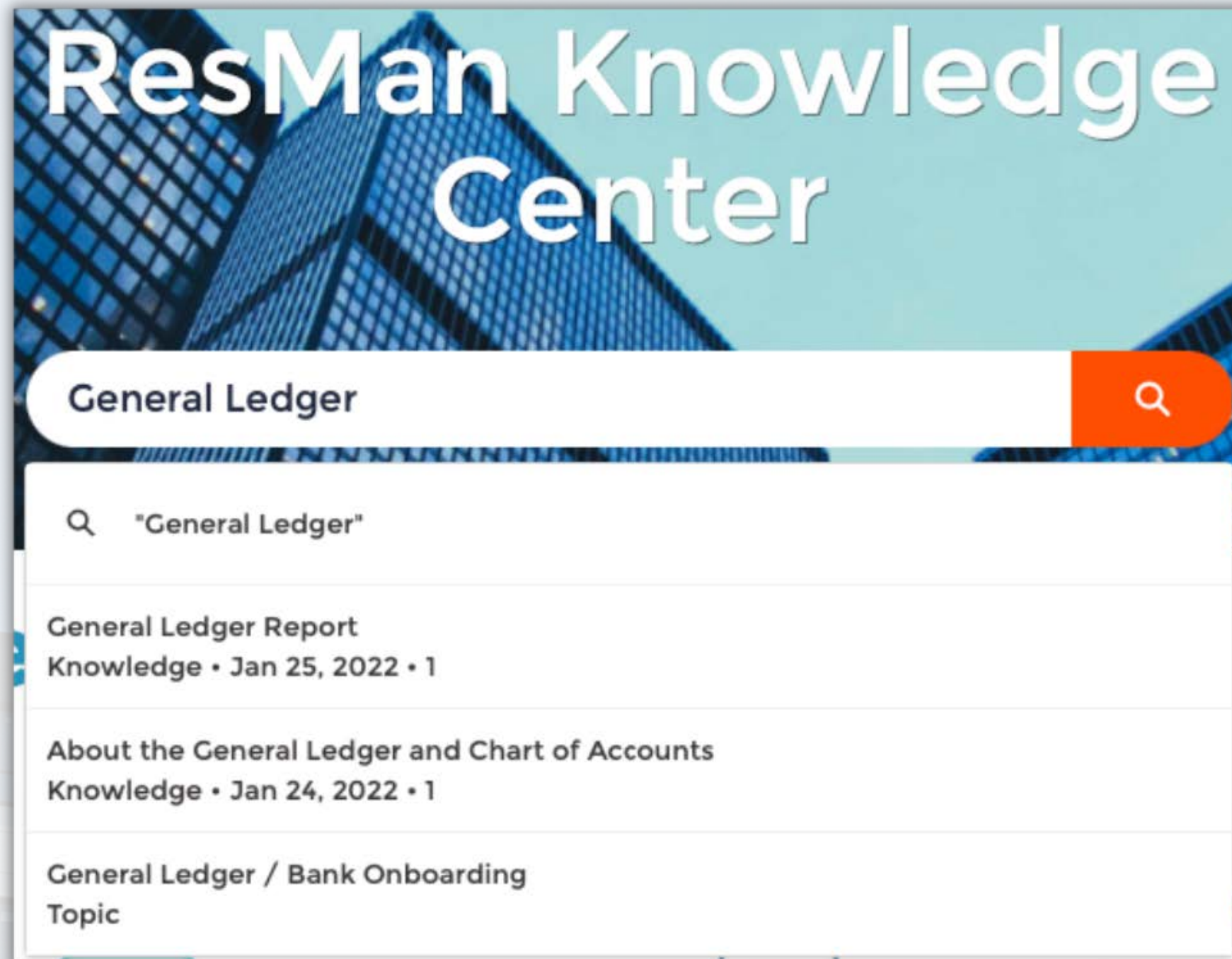
Known Issues

▼ Essentials

▼ [Known Issue: New Market Rent does not reflect on the Effective Date](#)  
When you adjusted the Market Rent but it does not reflect on the Effective date entered in the system.

▼ [Known Issue: Unit not showing as Not Ready after clicking Make Unit Ready](#)  
When you tried to change the status of a unit by clicking the Make Unit Ready button but the unit is still showing as Not Ready.





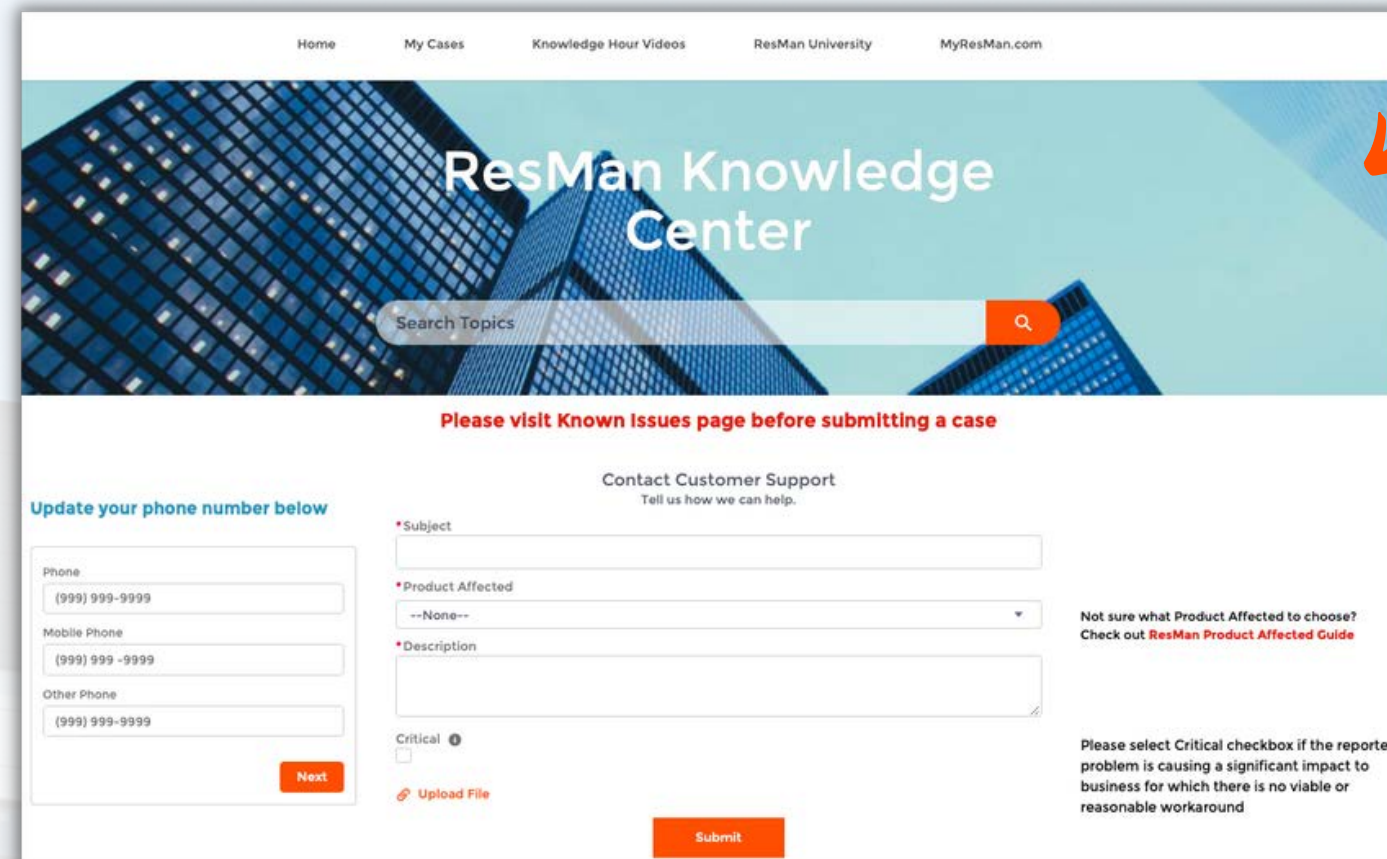
Use the spotlight search function to find anything under the ResMan sun! It will show you a general preview of available articles and will also direct you to the full library of information based on your search criteria.



### Need further assistance?

→ **Contact Customer Support**

- Need to submit a support ticket? Find this section at the bottom of the "**Home**" or "**My Cases**" pages. Click "**Contact Customer Support**" and you will be directed to the page below.



Home My Cases Knowledge Hour Videos ResMan University MyResMan.com

## ResMan Knowledge Center

Search Topics

Please visit Known Issues page before submitting a case

Contact Customer Support  
Tell us how we can help.

Update your phone number below

Phone  
(999) 999-9999

Mobile Phone  
(999) 999-9999

Other Phone  
(999) 999-9999

Next

\* Subject

\* Product Affected

--None--

\* Description

Critical

☐ Upload File

Submit

Not sure what Product Affected to choose?  
Check out [ResMan Product Affected Guide](#)

Please select Critical checkbox if the reported problem is causing a significant impact to business for which there is no viable or reasonable workaround

**\*IMPORTANT: Your residents will not be able to receive support from ResMan directly and should not contact ResMan when experiencing issues. The property must contact ResMan through the Knowledge Center to receive assistance for a resident account.\***

Please visit Known Issues page before submitting a case

Contact Customer Support  
Tell us how we can help.

\* Subject

Move-Out Deposit

\* Product Affected

Accounting

--None--

✓ Accounting

Commercial

ResMan (Our Contracts and Cancellations)

Credit Builder

Customer Portal

Essentials

Not sure what Product Affected to choose?  
Check out [ResMan Product Affected Guide](#)

Please select Critical checkbox if the reported problem is causing a significant impact to business for which there is no viable or reasonable workaround

Please visit Known Issues page before submitting a case

Contact Customer Support  
Tell us how we can help.

\* Subject

Move-Out Deposit

\* Product Affected

Accounting

\* Description

When processing a move-out, the system did not automatically apply the security deposit to outstanding charges after processing final charges to send final account statement to resident.

Critical

☐ Upload File

Submit

Not sure what Product Affected to choose?  
Check out [ResMan Product Affected Guide](#)

Please select Critical checkbox if the reported problem is causing a significant impact to business for which there is no viable or reasonable workaround



# ResMan®

## Support & Case Tracking

# ResMan Knowledge Center

## Quick Start Guide

**Please visit Known Issues page before submitting a case**

Contact Customer Support  
Tell us how we can help.

\*Subject  
Move-Out Deposit

\*Product Affected  
Accounting

\*Description  
When processing a move-out, the system did not automatically apply the security deposit to outstanding charges after processing final charges to send final account statement to resident.

Critical

Upload File

Submit

Not sure what Product Affected to choose?  
Check out [ResMan Product Affected Guide](#)

Please select Critical checkbox if the reported problem is causing a significant impact to business for which there is no viable or reasonable workaround

Not certain what area of the system is the cause of your concern and how to label the **"Product Affected"** field? Click the **"Product Affected Guide"** link to show the breakdown of each product within ResMan. The more information we receive about your case, the more effectively we can assist!

Product Affected Guide	
In the event our customers need guidance on which "Product Affected" option to select when creating a case for assistance, we are providing you with the below overview of each option.	
Please note that if you are not seeing an exact match to what you need, please feel free to select "Essentials" which will route your case to our general support queue for assistance. If we need to involve an alternate team to assist you, we will connect you.	
<b>Accounting</b>	Cases for this category typically relate to users who are in ResMan and accessing the Accounting Menu. Whether you need information on Budgets, Closing/Changing Periods, Processing your Invoices/Payables, Transaction Batching, GL Accounts, Journal Entries, GPR Entries select this option.
<b>Commercial</b>	Select this option if you are one of our customers managing a Commercial Property in ResMan and have this feature enabled.
<b>ResMan (Our Contracts and Cancellations)</b>	Select this option if you have previously submitted a request for a contract or the cancellation of a property and you are in need of an update. We will connect you with the ResMan Billing team.
<b>Credit Builder</b>	Select this option if your residents are currently signed up for Credit Builder and you have questions or items for the team to assist you with.
<b>Customer Portal</b>	Select this option if someone on your team is experiencing a Single Sign On Error when accessing the customer portal.
<b>Essentials</b>	Essentials is our Core product. Select this option whether you have a question or a concern regarding Settings, Transaction Categories, Resident Ledgers, Late Fees, Vendors, Employees, Maintenance and Work Orders, BoardRoom Features, Permissions, Property Features, Communication logs etc. Look to your Admin, Analytics, Personal, Accounts, Property, Tools Menu in ResMan.
<b>Integrations (add/remove)</b>	Select this option if you are looking to have a new integration added to ResMan as a business solution or are in need of deactivating an existing one.
<b>Integrations</b>	Select this option if you are experiencing concerns with an integration feature, or have questions regarding the product integration and expectations, including but not limited to third party payment processors.
<b>Investor Deal Room</b>	Select this option if you are an Investor Deal Room (Investor portal and management solution) customer and have questions or are in need of assistance.
<b>Onboarding</b>	Select this option if your property is undergoing onboarding or was recently turned live and you need to connect with your Implementation Team.
<b>ResMan (Our ResMan Billing)</b>	Select this option if you have a discrepancy on an invoice you received, you are in need of a copy of an invoice, or perhaps need to update a form of payment. We will connect you with the ResMan billing team.
<b>ResMan Affordable</b>	Select this option if you are one of our customers managing an Affordable Property in ResMan and have these features enabled.
<b>ResMan CRM</b>	Select this option if you are one of our customers managing your prospect and applicant traffic with the ResMan CRM Product and have these features enabled.
<b>ResMan Leasing</b>	Select this option whether you are processing Signature Packages, Leases, Screening, Resident Insurance, Online Applications, the Applicant Portal, Prospects and Quotes.
<b>ResMan Payments</b>	Select this option if you are a customer utilizing the ResMan Payments solution.
<b>ResMan Reporting</b>	Select this option if you are reviewing available reports in ResMan, have questions surrounding Custom Report Creation or the Custom Report Writer tool.
<b>ResMan Resident Portal</b>	Select this option if you are reviewing settings or your residents' access to the portal.
<b>Training &amp; ResMan Learning</b>	Select this option if you are looking to connect with our Training Team for LMS, the ResMan Learning platform, or need an update on a scheduled training.
<b>Websites</b>	Select this option if your community website was developed by the Razz team and you have questions regarding feature functionality, would like to request an updated timeline to the website development or connect with your Digital Project Manager.

View your open case requests on the **"My Cases"** page at the top of your navigation pane.

Home

My Cases

Knowledge Hour Videos

ResMan University

MyResMan.com

ResMan Knowledge Center

Search Topics

My Open ResMan Cases

11 Items • Sorted by Case Number • Filtered by All cases - Status, Severity, My • Updated a few seconds ago

Search this list...

	Ca...	↑ ▼	Conta...	▼	Subject	▼	S...	▼	Date/Time Op...	▼	T...	▼
1	00375975		Jason Pu...		New ResMan ...		New		11/29/2021 5:08 ...			
2	00375976		Jason Pu...		New ResMan ...		New		11/30/2021 5:25 PM			
3	00375977		Jason Pu...		New ResMan ...		New		11/30/2021 5:35 PM			
4	00376001		Jason Pu...		My Test Onbo...		New		1/26/2022 2:53 PM			
5	003760...		Jason Pu...		test onboardin...		New		1/26/2022 3:08 PM			
6	00376003		Jason Pu...		Test Onboardi...		New		1/26/2022 3:53 PM			
7	003760...		Jason Pu...		Test-Updated ...		New		2/8/2022 2:09 PM			
8	003760...		Jason Pu...		Test-Updated ...		New		2/8/2022 2:18 PM			
9	00376011		Jason Pu...		Test-Billing Flo...		Open		2/8/2022 2:32 PM			
10	00376012		Jason Pu...		Test -Websites...		Open		2/8/2022 2:33 PM			
11	00376043		Jason Pu...		test		New		2/18/2022 2:28 PM			



# ResMan<sup>®</sup>

## Support & Case Tracking

# ResMan Knowledge Center

## Quick Start Guide

My Open ResMan Cases ▾

11 Items • Sorted by Case Number • Filtered by All cases - Status, Severity, My • Updated a few seconds ago

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1	00375975		Jason Pu...		New ResMan ...		New		11/29/2021 5:08 ...			▾
2	00375976		Jason Pu...		New ResMan ...		New		11/30/2021 5:25 PM		Edit	▾
3	00375977		Jason Pu...		New ResMan ...		New		11/30/2021 5:35 PM			▾
4	00376001		Jason Pu...		My Test Onbo...		New		1/26/2022 2:53 PM			▾
5	003760...		Jason Pu...		test onboardin...		New		1/26/2022 3:08 PM			▾
6	00376003		Jason Pu...		Test Onboardi...		New		1/26/2022 3:53 PM			▾
7	003760...		Jason Pu...		Test-Updated ...		New		2/8/2022 2:09 PM			▾
8	003760...		Jason Pu...		Test-Updated ...		New		2/8/2022 2:18 PM			▾
9	00376011		Jason Pu...		Test-Billing Flo...		Open		2/8/2022 2:32 PM			▾
10	00376012		Jason Pu...		Test -Websites...		Open		2/8/2022 2:33 PM			▾
11	00376043		Jason Pu...		test		New		2/18/2022 2:28 PM			▾

Need to update a support case? Locate the case you want to edit in the **"My Cases"** section, and click the drop-down to the right.

A pop-up window will appear with your case details to make your changes and save. You can also use this feature to copy a case, change any relevant details, and click **"Save & New"** if submitting a new ticket with similar support details.

### Edit Case

Contact Name  
Jason Pucci

Is ResMan University Access Request?  
☐

• Status  
New

Case Owner  
Conventional

Subject  
New ResMan University Access Request has been

Description  
ResMan University Access request

#### ResMan University Request Form Details

First Name  
Jason

Last Name  
Pucci

Property Management Company  
My Company

Job Title  
Manager

Email  
test@pucci.com

Cancel Save & New Save





- The ResMan Support Team will periodically post critical customer updates on the main page of the Knowledge Center. These may relate to a variety of things like company meetings, holiday closures or product concerns (if any at the time).
- Should you see this notification, take a moment to review the message by clicking on the banner to see an overview of the update and any critical information.

Chat

•First Name

Johnny|

•Last Name

User

Email

johnny.user@myresman.com

•Subject

Case Type

Issue

Start Chatting

Chat with an Expert

Need further assistance?  
Contact Customer Support

Agent Offline

### If you are user that has access to our chat feature...

- Look out for the orange "Chat with an Expert" button on the bottom right of the "Contact Customer Support" page. This is the same page you would submit your support tickets.
- If the orange chat indicator shows "Chat with an Expert", we have a support team member available to assist! If the message shows "Agent Offline", feel free to explore our knowledge articles or submit a case ticket.
- Our ResMan Support Team is available to chat with you from Monday - Friday: 8:00AM - 7:00PM CST (Excluding Holidays)

*\*This feature is only available to specific users\**



### IMPORTANT: Update Preferred Phone Number Contact Information

Please visit [Known Issues](#) page before submitting a case

Update your phone number below

Phone  
(999) 999-9999

Mobile Phone  
(999) 999 -9999

Other Phone  
(999) 999-9999

Next

Contact Customer Support  
Tell us how we can help.

\*Subject  
[Text Box]

\*Product Affected  
--None--

\*Description  
[Text Box]

Critical ☐

Upload File

Submit

Not sure what Product Affected to choose?  
Check out [ResMan Product Affected Guide](#)

Please select Critical checkbox if the reported problem is causing a significant impact to business for which there is no viable or reasonable workaround

### Update your phone number below

Phone  
(999) 999-9999

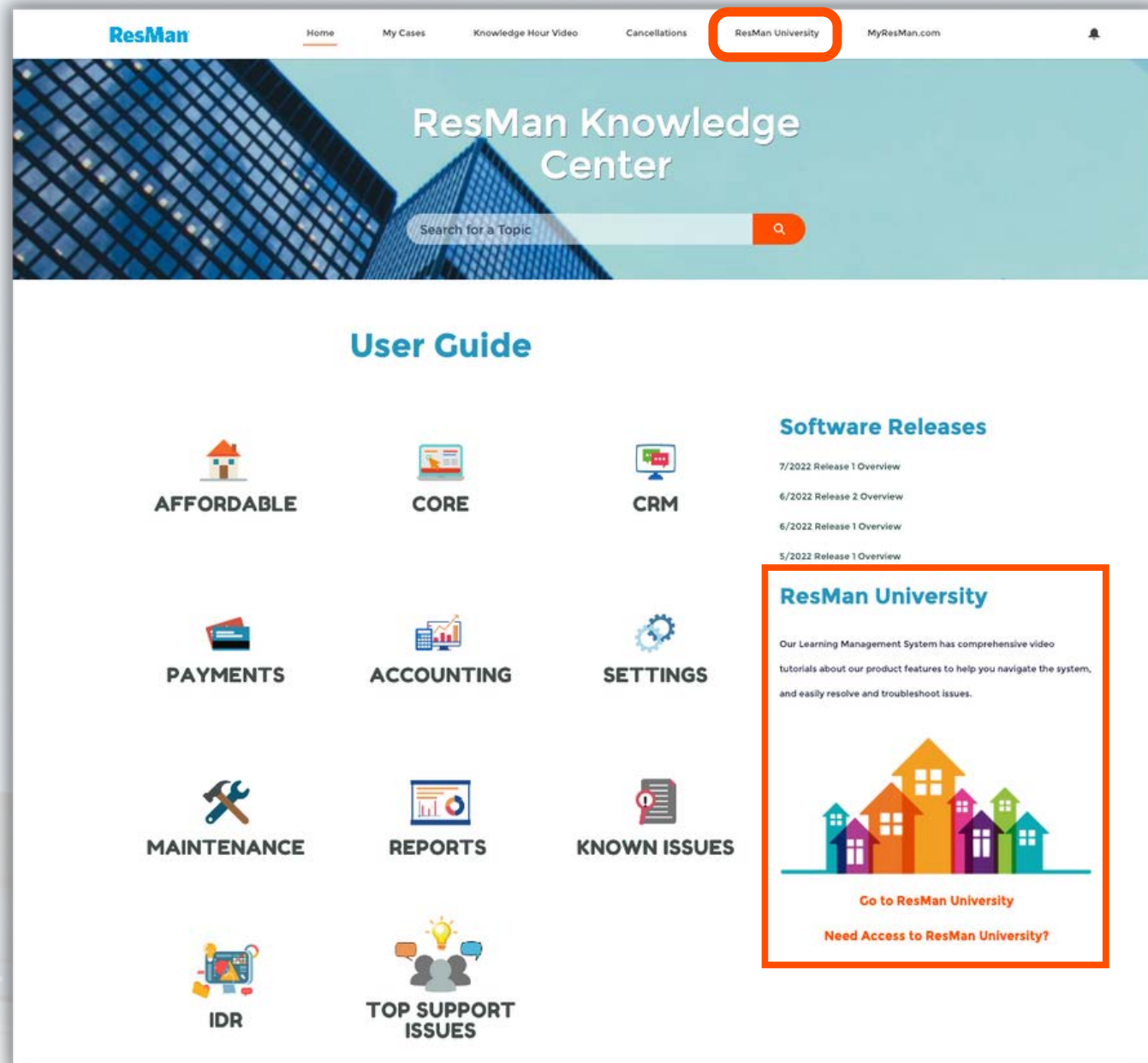
Mobile Phone  
(999) 999 -9999

Other Phone  
(999) 999-9999

Next

- Update your phone number with ResMan Support by completing the **"Update your phone number"** form to the left of the **"Contact Customer Support"** page when submitting a support case.
- If **ResMan Support** needs to contact you about your case, this will help us address your concerns quickly & efficiently. This form will only need to be completed once until you need to update your phone number again. You may use any number (personal or business) for support to contact you directly.





- Access your **"ResMan University"** profile directly from the Knowledge Center on the home screen or on the navigation pane.
- This allows you to seamlessly move between your Knowledge Center and your ResMan platform training.



- View our Training Team's **"Knowledge Hour Videos"** at the top of your navigation pane.
- **"Knowledge Hours"** are customer focused webinars to help our ResMan user family navigate the ResMan platform and allow for a forum of questions and feedback for common obstacles and action items.

