

RealPage Vendor Network Guide for New Vendors

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WELCOME

Guide for New Vendors

We would like to take this opportunity to welcome you to the RealPage Vendor Network and OpsTechnology platform.

OpsTechnology offers you a great way to save time, save money, better connect with property management companies, streamline the order/invoice process and so much more.

This guide will provide you with helpful information including set-up instructions, best practices, frequently asked questions and more so you can easily get started and navigate through the world of online procurement.

The OpsTechnology Support Team is available to help any step of the way. Contact us with any questions.

Sincerely,

OpsTechnology Support Team

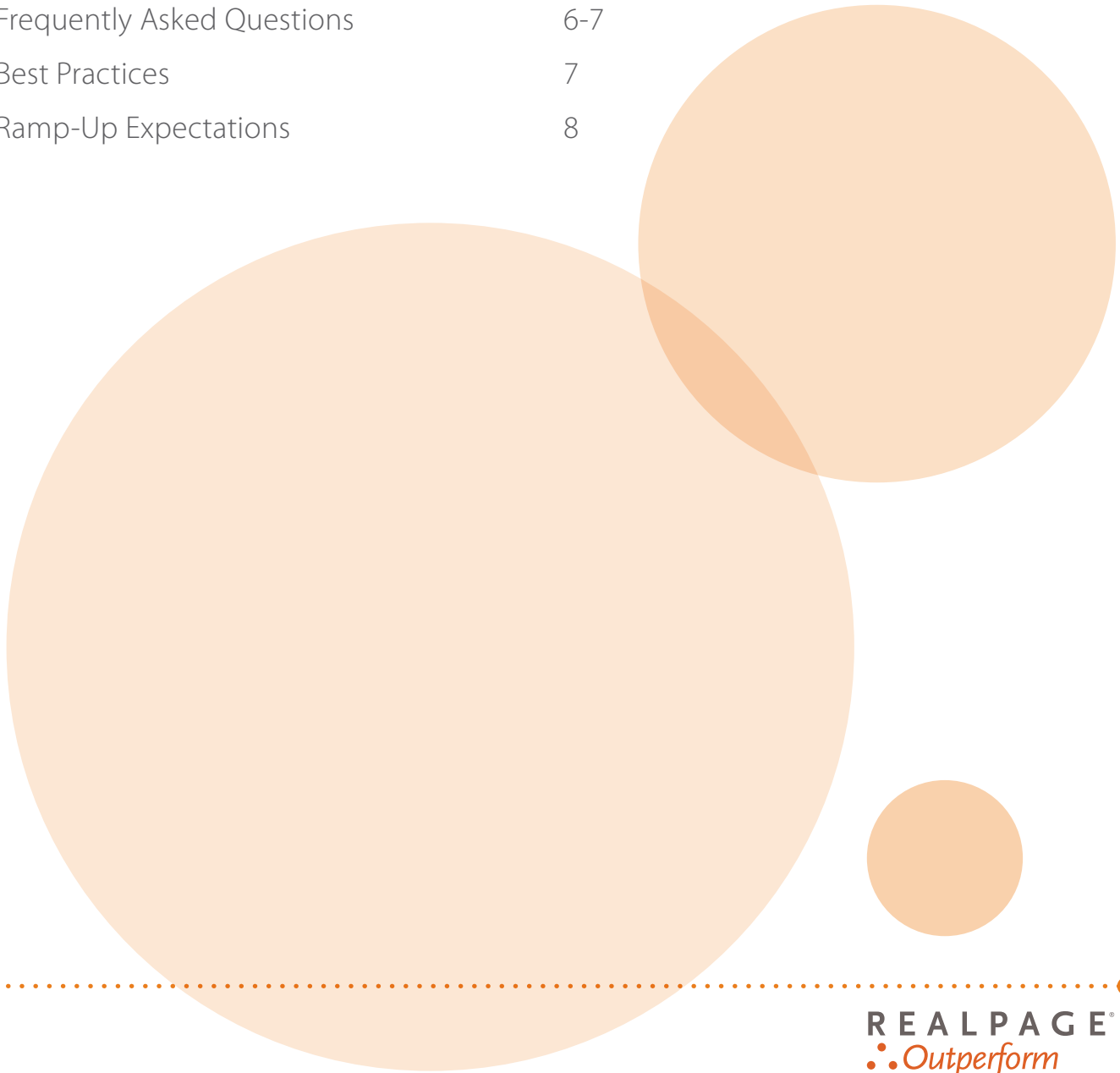
Email: servicerequests@opstechnology.com

Phone: 800-704-0154, option 7

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HELPFUL LINKS

OpsMerchant Login Page: <https://merchant.opstechnology.com>

OpsTechnology Website: <http://www.realpage.com/opstechnology/>

On-Demand Training: <http://www.realpage.com/training/on-demand-learning/>

GETTING STARTED CHECKLIST

Follow the simple steps below to complete the set up process.

Section I - Company Information

- Verify and update the information on your company profile page. This information is visible to all property management companies in our network.**
 1. Login to your account at: <https://merchant.opstechnology.com>
 2. Go to *Account & Settings*
 3. Edit the Company Profile

- Update the products and services you offer. Be sure to include all products and services offered so you don't miss out on new opportunities.**
 1. Login to your account at: <https://merchant.opstechnology.com>
 2. Go to *Account & Settings*
 3. Click on *Services* and make the appropriate selections from the list provided

- Update your service locations. Again, be sure to include all locations you service so you don't miss out on new opportunities.**
 1. Login to your account at: <https://merchant.opstechnology.com>
 2. Go to *Account & Settings*
 3. Click on *Locations*
Please note that if you do not provide service nationwide, uncheck the box & enter the city/state and then click *add city*.

Section II – Account Set Up

□ Accept new account requests to set up current customers.

1. Login to your account at: <https://merchant.opstechnology.com>
2. Go to the *Messages* tab
3. Select *New Account*
4. Add appropriate account number or click *Generate Account #*
5. Click *Save*

□ Submit a catalog file to display your custom catalog to current customers.¹

1. Login to your account at: <https://merchant.opstechnology.com>
2. Go to the *Products Tab*
3. Select *Catalog Requests*
4. Select *New*
5. Select the current customer's company name
6. Select the *Request Type*
7. Use the browse function to locate the catalog & attach it
8. Click *Submit*

□ To integrate to QuickBooks so you can transfer order/invoice information from QuickBooks rather than keying information into OpsMerchant.

1. Login to your account at: <https://merchant.opstechnology.com>
Go to the homepage
2. View the area marked *Need Help*
3. View the *QuickBooks Plug-In* section

□ To integrate to other accounting systems so order/invoice information can be automatically transferred rather than keying information into OpsMerchant.

1. Contact OpsTechnology Support at servicerequests@opstechnology.com
or 800-704-0154, option 7

¹ Managed Catalog Vendors

TRAINING

Review the training chart below for quick links to training videos and instructions.

- **Setting up a New Account** for information on how to set up new accounts.
- **Confirm an Order** for information on how to confirm an order in your OpsMerchant account.²
- **Create an Invoice from a Confirmed Order** for information on how to create an invoice from a confirmed order.²
- **Create an Electronic Invoice** for information on how to create an invoice for an order generated outside of the OpsTechnology application.

Process	Managed Catalog	Electronic Invoice	Training Document	Training Video
Setting up a new account	✓	✓	Link to document	Link to video Go to the OpsTechnology section/ OpsMerchant Curriculum
Confirming an online order	✓		Link to document	Link to video Go to the OpsTechnology section/ OpsMerchant Curriculum
Creating an invoice from an online order	✓		Link to document	Link to video Go to the OpsTechnology section/ OpsMerchant Curriculum
Creating an electronic invoice	✓	✓	Link to document	Link to video Go to the OpsTechnology section/ OpsMerchant Curriculum
Creating a catalog	✓		Link to document	Link to video Go to the OpsTechnology section/ OpsMerchant Curriculum
New customer invitations	✓	✓		Link to video Go to the OpsTechnology section/ OpsMerchant Curriculum
Creating a credit memo	✓	✓	Link to document	Link to video Go to the OpsTechnology section/ OpsMerchant Curriculum
Invoicing options	✓	✓	Link to document	
Updating account information in OpsMerchant	✓	✓	Link to document	
Quick step guide	✓	✓	Link to document	

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FREQUENTLY ASKED QUESTIONS

Please see below for a list of frequently asked questions.

A. Who do I contact if I have questions?

The OpsTechnology support team can be reached at servicerequests@opstechnology.com or 800-704-0154, option 7

B. What type of training does OpsTechnology offer for vendors?

1. Training Guides – the links to these guides are available in the training section of this document.
2. WebEx – contact the OpsTechnology support team to schedule a WebEx or determine when the next group training is scheduled.
3. Training Videos – click on the *Need Help* section on the homepage of your OpsMerchant account.
4. Interactive Training Videos – visit <http://www.realpage.com/training/on-demand-learning/> to register for the on-demand training videos.

C. Does OpsTechnology offer any marketing for vendors in the vendor network?

Yes, we offer free marketing for all vendors in the network. All customers can view your company listing at <http://community.opstechnology.com>.

To gain the most visibility, update your profile page in OpsMerchant – *Account & Settings*. Be sure to include your company description, services offered and service locations. See Section I of this document to learn how to update your profile page.

D. How do I create my catalog file?

Reference the *creating a catalog* link in the training section of this document.

E. The new account request in OpsMerchant is asking for an account number. Where do I find this account number?

The account number used should be your accounting systems unique identifier for the property. If you do not use account numbers, the property name can be used. *Please note that each property should have a unique name or number assigned.*

F. What is the difference between a managed catalog and e-invoice vendor?

- Managed Catalog – Vendor submits a catalog of products/services offered specific to a property management company. Property managers will use this catalog of items to create and send electronic orders via OpsTechnology. Upon completion of the order, the vendor will then create an electronic invoice from the order.
- e-Invoice – The order will be initiated outside of the OpsTechnology platform and an electronic invoice will be sent via OpsTechnology.



G. I don't want to enter my invoices manually. What are my options?

OpsTechnology can integrate with most accounting systems to import invoice files via the three options below. Contact the OpsTechnology support team for additional information.

1. QuickBooks Plug In – This adapter will allow orders/invoices to transfer between QuickBooks and OpsMerchant automatically. For additional information see the homepage of your OpsMerchant account – *Need Help – QuickBooks Plug In*.
2. Import Invoice Files – This adapter will allow you to import/export order and invoice files from your accounting system into OpsMerchant.
3. Post Invoice Files to an FTP site – This will allow you to import/export order and invoice files that are posted to an FTP site and processed.

H. I want to work with more properties via OpsTechnology. How do I do this?

As a member of the RealPage Vendor Network you are able to work with any property management company that uses OpsTechnology. To begin the set up process, the property or property management company will need to send a request to your OpsMerchant account. To accept the request, simply login to your account and process the request (located in your messages section).

Additionally, our Vendor Account Managers are available to assist you with identifying OpsTechnology customers within your service area that are not current customers.

BEST PRACTICES

- Update your company's public profile page as soon as possible as noted in Section I of this document.
- Review the training information provided and contact OpsTechnology with any questions or to schedule a training call.
- Accept new customer and new account requests from property management companies as soon as possible as noted in Section II of this document.
- Submit your catalog file as soon as possible as noted in Section II of this document.³
- Monitor your homepage in OpsMerchant to view any open requests, pending orders, invoices and bid requests.
- Integrate OpsMerchant with your accounting system to streamline the order/invoice process.

³ Managed Catalog Vendors

RAMP-UP EXPECTATIONS

- Upon completion of the registration process, the property management company will receive an email notification that your account can be enabled immediately.
- A new account request will be sent from the property management company between 1–7 days.
- For managed catalog registration, catalogs should be loaded into OpsMerchant immediately. The catalog will be online within 10 days of approval.⁴
- Once you have created the property account and the catalog file is loaded, properties will be able to access your product information and process orders immediately.⁴
- You will receive an email order notification upon the approved order being transmitted to your account. The order will be visible in your OpsMerchant account immediately.⁴
- Invoices can be sent electronically to the property 30 minutes after assigning the requested account number.
- Your public profile page is visible upon completed registration and you may begin to receive new customer requests for other property management companies using OpsTechnology.
- OpsTechnology system updates and enhancements are typically rolled out on a quarterly basis. You can expect to receive information tied to these enhancements quarterly via email.
- Overviews of any enhancements are previewed via live WebEx demonstrations prior to the enhancements going live. You can expect to receive invitations to attend these demonstrations via email.

If you still have questions after reviewing this document please contact us at servicerequests@opstechnology.com or by calling 800-704-0154, option 7.

⁴ Managed Catalog Vendors