

updater.

HANDBOOK

FOR COMMUNITY MANAGERS
& LEASING TEAMS

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A Note from the Team

Welcome to Updater – we're thrilled to have you as a partner!

Whether you're brand new to Updater or need a refresher, we know that learning the ropes of a new technology can be difficult. To help you get acquainted, we've covered all of the Updater basics for you in this handbook.

Flip through, take a look around, and get to know the ins and outs of your newest digital amenity. You'll be an Updater expert in no time!

Looking forward to working with you,

The Updater Success Team



Updater 101

WHAT IS UPDATER?

Updater is your newest digital amenity – a time-saving tool that helps streamline the entire moving process for both your residents and your team. Residents moving into or out of your community now get free access to your co-branded, custom dashboard that helps them organize and complete all of their moving-related tasks in one online space.

WHAT DOES UPDATER DO FOR ME?

**DID YOU
KNOW THAT**

74%

**of renters wish their management
company offered moving assistance?**

Updater provides you an easy way to lend residents a helping hand during a stressful time – boosting resident satisfaction and saving you time as well.

WHAT DOES UPDATER DO FOR MY RESIDENTS?

Updater helps your residents with any and all moving-related tasks, including updating accounts and records, connecting utilities, forwarding mail, and more! Be sure to check out our “Features Overview” section for a deep dive on our resident-facing features.

WHAT DO I HAVE TO DO?

Not much at all! We’ve designed our platform to run completely behind the scenes, requiring no extra work from your team. It’s the closest thing to magic we could come up with. All you have to do is talk about Updater as one of your amenities with prospects and future move-ins.

How It Works

Updater is a digital amenity that works completely behind the scenes. That's right, there's not much you need to do to make it work!

Our technology is directly integrated with your property management software which allows us to pull basic resident information in real time as you're leasing. As long as your residents have the required information and the correct status listed in your property management software, they will receive an Updater invite without you having to lift a finger.

WHAT INFORMATION IS REQUIRED?

Your property management software must have your residents':

1. First and last name
2. Email address
3. Move date
4. Address(es) they are moving to and/or from

IS MY RESIDENT'S INFORMATION SAFE WITHIN UPDATER?

Absolutely! We take your residents' [privacy](#) very seriously, so all of their information is secure within our system. We also never collect highly sensitive information from your residents.

WHEN WILL RESIDENTS RECEIVE THEIR INVITES?

Updater invitations are sent 35 days prior to your residents' move date. If a lease happens within that 35-day time period, Updater invitations are sent the very next business day. Please keep in mind that each software has its own specific triggers. For more details on how invites are triggered at your community, contact success@updater.com.

WHAT IF MY RESIDENT IS MISSING AN INVITE?

If your resident did not receive an invite to Updater, please verify that their information and status in your property management software meet our requirements. If they do, feel free to get in touch with us.

IS THERE ANYTHING ELSE I SHOULD DO?

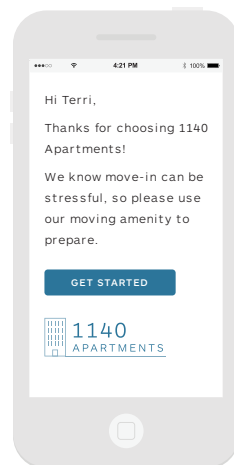
Talk to your residents about Updater – it's that simple! Advise them to keep an eye on their inbox for their very own Updater invite – it's the best way to make sure they take full advantage of your property's newest digital amenity.

INTEGRATE



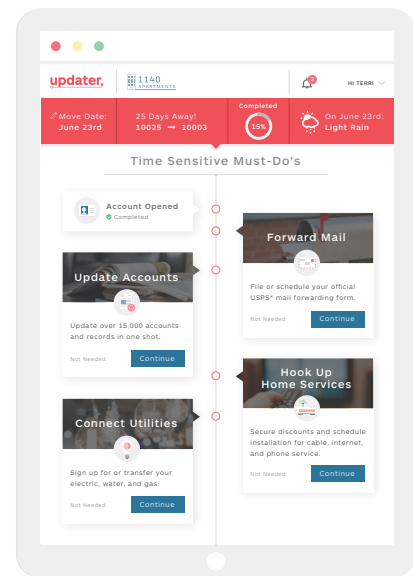
We integrate with your core management software to pull resident information.

INVITE



Invitations sent when trigger criteria is met - you don't need to do a thing!

MOVE-IN



Every resident has an experience customized to fit their unique move.

Sample Resident Invite and Dashboard

Residents receive an email invitation at the exact right time before move-in day.

From: 1140 Apartments via Updater
Date: Thu, Jun 2, 2016 at 1:57 PM
Subject: 1140 Apartments wants to simplify your move
To: Terri Resident <terri@happyresident.com>

Hi Terri,

We know moving can be stressful, so we're happy to share Updater with you - it will save you hours on your moving-related tasks.

The link below will help you transfer utilities, update accounts and subscriptions with your new address, forward mail with the USPS, send fun moving announcements and more. It's completely free for our residents.

[CLICK HERE TO GET STARTED!](#)

1140
APARTMENTS

YOUR
LOGO
HERE!

updater. 1140 APARTMENTS HI SHARON

Move Date: June 23rd 25 Days Away! 10025 → 10003 Completed 15% On June 23rd: Light Rain

Time Sensitive Must-Do's

- Account Opened Completed
- Update Accounts Not Needed [Continue](#)
- Connect Utilities Not Needed [Continue](#)
- Forward Mail Not Needed [Continue](#)
- Hook Up Home Services Not Needed [Continue](#)

This invitation directs them to their personalized Updater dashboard.

*Please note: This is a sample resident dashboard. Any customizations your company may have purchased are not reflected in this example.

Feature Overview

When your residents log into Updater, they're taken to their very own Updater dashboard – a customized hub, co-branded for your community, where they can complete all of their moving related tasks.

OUR FEATURES INCLUDE:



FORWARD YOUR MAIL

DESCRIPTION:

With just a few clicks, your resident can file their official USPS mail forwarding form (pre-populated with their new address) via Updater. No trip to the post office or fee required!

HOW TO TALK ABOUT IT:

“You can skip that trip to the post office and forward your mail with the USPS for free through Updater, our move-in amenity.”



UPDATE YOUR ACCOUNTS

DESCRIPTION:

Our founding feature allows residents to seamlessly update the mailing address for any of their accounts and subscriptions in just a few clicks. From newspapers to loyalty programs, we've partnered with over 15,000 businesses to save them hours on updating accounts.

HOW TO TALK ABOUT IT:

“My favorite feature – you can notify all of the businesses you care about that you've moved in just a few minutes and clicks.”



CONNECT UTILITIES

DESCRIPTION:

This step helps your residents seamlessly sign up, transfer, or disconnect their electric, gas, and water services. Within this feature, your residents will see the utilities your property requires them to set up (and only those utilities). They'll also see which specific electric, gas, and water companies your property uses.

HOW TO TALK ABOUT IT:

“We help connect you with the right companies that service your new home and let you know which utilities we require to be setup for move-in day.”



HOOK UP YOUR HOME SERVICES

DESCRIPTION:

We provide a direct line to an Updater moving concierge who can give your residents personalized recommendations for cable and internet. They can even go as far as schedule installation appointments, hassle-free.

HOW TO TALK ABOUT IT:

“Our home services concierge, available through Updater, can take you through all of the available cable and internet packages in our area!”



YOUR LOCAL GUIDE

DESCRIPTION:

This customizable feature helps residents get familiar with your community and feel at home on day one. The Local Guide allows you to showcase local services, amenities, and business that your resident may need – think of it as a directory to their new neighborhood!

HOW TO TALK ABOUT IT:

“Updater makes it easy to connect with and learn about local providers and vendors. Perfect before, during, and after your move.”



OBTAIN RENTERS INSURANCE

DESCRIPTION:

If renters insurance is available for your residents, you can include the Obtain Renters Insurance step in their Updater dashboard. Within this feature, they’ll be able to see your property’s insurance requirements, as well as your recommended provider. If renters insurance is mandatory for your community, we’ll even put a required banner on this step to remind your residents it’s essential.

HOW TO TALK ABOUT IT:

“It’s so easy to connect with our Renters Insurance provider right through Updater – all of our requirements can be found within your dashboard before move-in.”



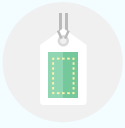
BOOK YOUR MOVE

DESCRIPTION:

Residents are able to compare quotes from Updater Certified Moving Companies and reserve a moving company.

HOW TO TALK ABOUT IT:

“Updater makes it so easy to compare quotes and reserve a trustworthy moving company in minutes!”



SEARCH MOVE-IN OFFERS

DESCRIPTION:

Moving can be expensive! Your residents will be able to browse timely discounts and deals within Updater, as well as some perks to help them get settled post-move. Think of it as a collection of housewarming gifts for your residents.

HOW TO TALK ABOUT IT:

“We’ll also help you score major savings on things like cardboard boxes, furniture, and much more within Updater!”



SHARE MOVING ANNOUNCEMENTS

DESCRIPTION:

Friends and family need to know that your resident moved, and this feature takes care of that. This step allows residents to create a personalized e-card that can be shared through social media. Each announcement gives a shout-out to your community by displaying your logo, too – hello, implied referrals.

HOW TO TALK ABOUT IT:

“Our digital move-in dashboard lets you share a custom e-card with friends and family to let them know about your new home.”



ACCESS YOUR RESIDENT PORTAL

DESCRIPTION:

We know a lot of important things happen inside of your Resident Portal. If you’d like, you can include the Access Your Resident Portal feature to directly link your resident to your community’s portal. Residents can click right in to pay rent, submit service requests, and find community info – straight from the Updater dashboard.

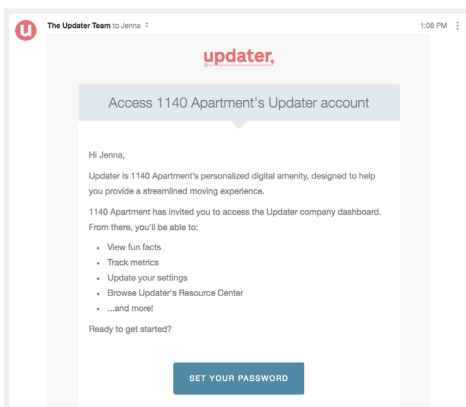
HOW TO TALK ABOUT IT:

“Once you’re moved in, Updater makes it easy to access your Resident Portal directly from your dashboard.”

Your Manager Dashboard

Although Updater works completely behind the scenes, we know how important it is for you to stay up to speed on how your residents are engaging with it. We've built this Manager Dashboard just for you – making it easy to access metrics, view fun facts, update settings, and more. This is your home for all-things Updater!

**Please note that Manager Dashboard capabilities may vary depending on the permissions set by your corporate team*

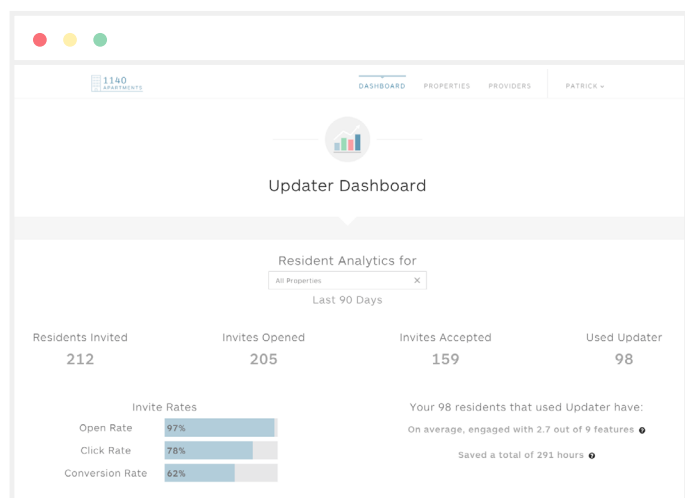


HOW DO I ACCESS MY DASHBOARD?

You should have received an email invite to your Dashboard following your first Updater training. Be sure to claim your account by setting a password of your choice. Pro Tip: Bookmark that page for future use and be sure to save your login information.

WHAT CAN I DO WITHIN MY DASHBOARD?

1. View engagement metrics to stay up-to-speed on how residents at your community are utilizing Updater.
 - a. **How:** Click “Dashboard” on the top right of the screen.
 - b. **Pro Tip:** Highlight these metrics in your team meetings and set goals for your leasing agents. Better engagement = more time saved for you!



2. Ensure that the community information we have on record is accurate and up-to-date including manager contact information, social media links, community logo, and more.
 - a. **How:** Click “Properties” on the top right of the screen.
 - b. **Pro Tip:** We always want to share our industry insights and updates with you, so be sure we have the correct email on record.
3. Customize residents’ Local Guide with referral partners, local favorites, and community amenities.
 - a. **How:** Click “Providers” then “Add New Provider.”
 - b. **Pro Tip:** There are tons, see below!

CUSTOMIZING YOUR LOCAL GUIDE

Remember this step from our Feature Overview? This is your residents’ directory for their new home and an opportunity for you to showcase any revenue generating partnerships or amenities.

Here are some of our best practice tips for the Local Guide:

1. The More Information, The Better

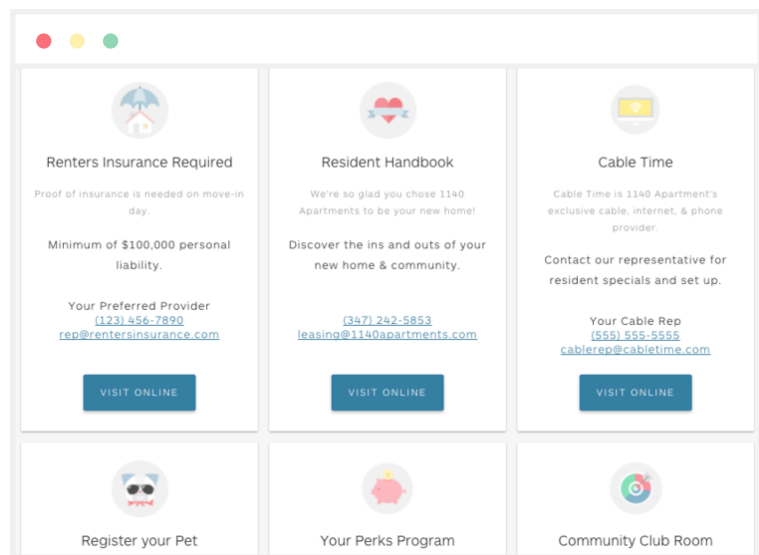
- The best Local Guide items include a logo, brief description, point of contact, phone number, email address, and link to a website. Give us all you’ve got!

2. Offer Discounts & Deals

- To say moving is expensive would be an understatement. Help your residents minimize spending by partnering with local businesses to offer discounts to your community.

3. Think Big

- The Local Guide feature really is what you make of it. You have the potential to create an amazing resource for your residents, so take advantage of it!



Resident Engagement

- Add Mention of Updater to Your Welcome Letter**
Use [this sample text](#) or our [customizable template](#) – most of the information your new residents need about their move and new home now lives in Updater!
- Customize Your Community's Local Guide**
Favorite burger spot? Closest grocery story? Log on to your Manager Dashboard and add suggestions to your Local Guide. [Get creative!](#)
- Mention Updater on Your Prospect Tours**
Updater is a great closing tool. Tell your prospects about the hours and dollars they'll save by using your digital moving concierge.
- Include the *Moving Made Easy* Video in Your Follow-Ups**
Following up with a prospect? Include this [20-second clip](#) to help get that lease signed!
- Submit Community-Specific Information**
[Submit details](#) about your community's utility requirements, renters insurance, and more.
- Updater-ify Your Leasing Office**
Print this [one-sheet](#) for move-in packets, or go green – frame it and display it in your office.
- Post on Social**
Let the world know about the top-notch move-in experience at your community!
Use [these sample posts](#) for social media.

Let's Recap

We've covered a lot, so let's recap!

HERE'S WHAT WE'D LIKE YOU TO KEEP IN MIND:

1. UPDATER IS YOURS, OWN IT!

This technology is completely yours. In fact, it's now the first amenity that residents can take advantage of at your community. Own it, become an expert, and be sure to talk about this amazing tool you offer with prospects and future move-ins.

2. YOU'RE [MOSTLY] OFF THE HOOK

Remember, we're running completely behind the scenes in an effort to make things easier for you. As long as your property management software is up-to-date, Updater works on its own.

3. WE'RE HERE FOR YOU

Questions? Comments? Concerns? Send them our way! Drop a note to success@updater.com or reach out to your Success Manager by phone or email. Even if you just want to say hello, we'd love to hear from you.

