Onboarding and Data Preparation Checklist

Log In to Unified Platform

Logging In to RealPage Unified Platform for the First Time
Before you can log in to RealPage Unified Platform, a RealPage System Administrator must create an account for you. You will receive an email with a link to activate your account.

1. Select the link in the account activation email.
2. Set your **Password**.
3. Select **Save and Continue**.
4. Set security questions and answers.
5. Select **Submit**.

> *i* If your company uses RealPage multi-factor authentication, you might also be prompted to set up your authentication method.

**Logging In to RealPage Unified Platform**

1. Go to https://www.realpage.com/home.
2. Enter your **Username**. If you are a regular user, external user, or RealPage system administrator, this is typically your primary email address.
3. Select **Next**.
4. The authentication that displays depends on your account's configuration. If prompted, enter your **Password**.
5. Select **Login**.

> *i* If your company uses a third-party identity service to authenticate your user account, log into that system to access RealPage Unified Platform.

Take Training in the RealPage Product Learning Portal

1. Log in to **Unified Platform**.
2. In the **Resources** section, select the **Product Learning Portal** tile.
3. Use the search function to quickly locate and take these courses:
   - Navigate Unified Platform
   - Create and Manage Users for Unified Platform
   - DataHub Introduction - Demonstration
   - Access and Navigate DataHub - Demonstration
   - Navigate the DataHub Work Queue - Demonstration
   - Review Implementations Section Part 1 - Demonstration
   - Review Implementations Section Part 2 - Demonstration
   - Manage Shared Fields - Demonstration
   - Manage Tables and Import Files - Demonstration
   - Communicate with Comments - Demonstration
   - Upload Data to the File Repository - Demonstration
   - Create and Apply Implementation Templates - Demonstration
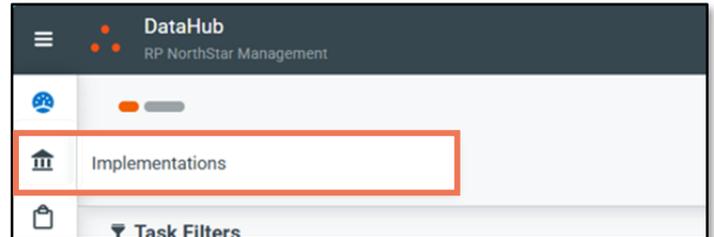   - Questionnaire Life Cycle - Demonstration
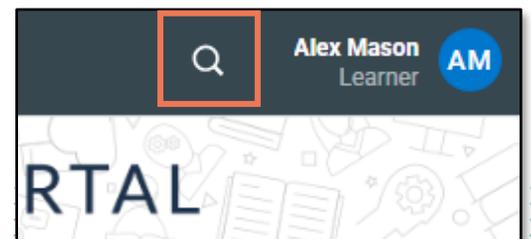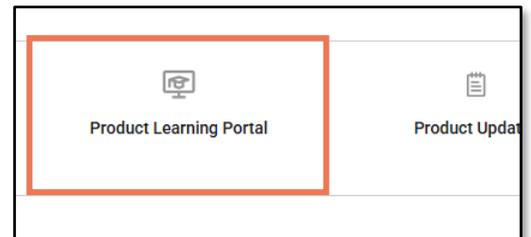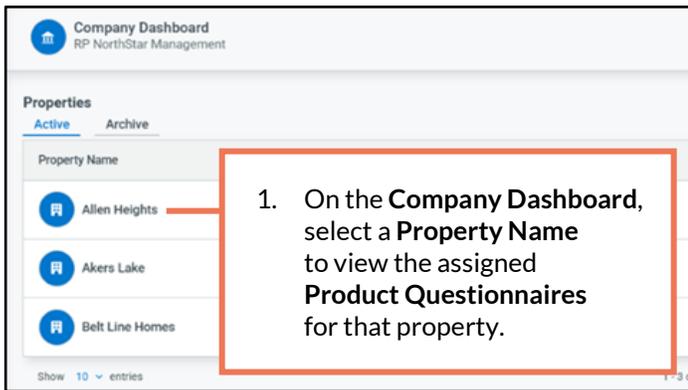
REALPAGE

1. Log in to **Unified Platform**.
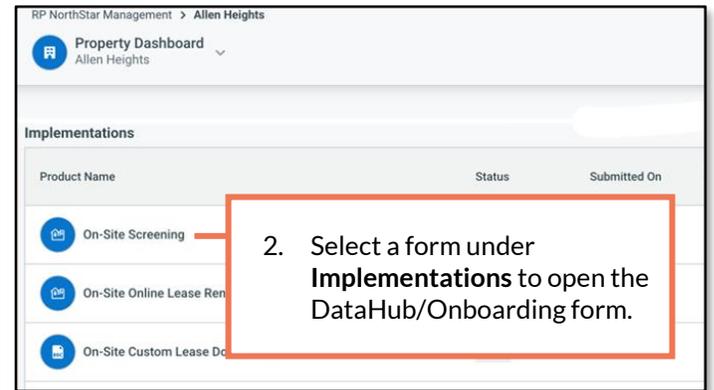2. In the **Resources** section, select **DataHub**.
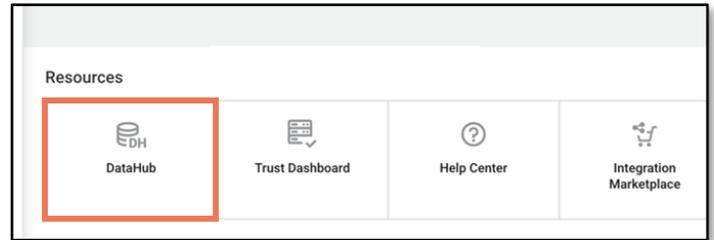
3. Upon accessing **DataHub**, it will default to the **Work Queue**.
4. Select **Implementations** from the left-hand side menu to complete assigned product questionnaires.

View Product Questionnaires

1. On the **Company Dashboard**, select a **Property Name** to view the assigned **Product Questionnaires** for that property.
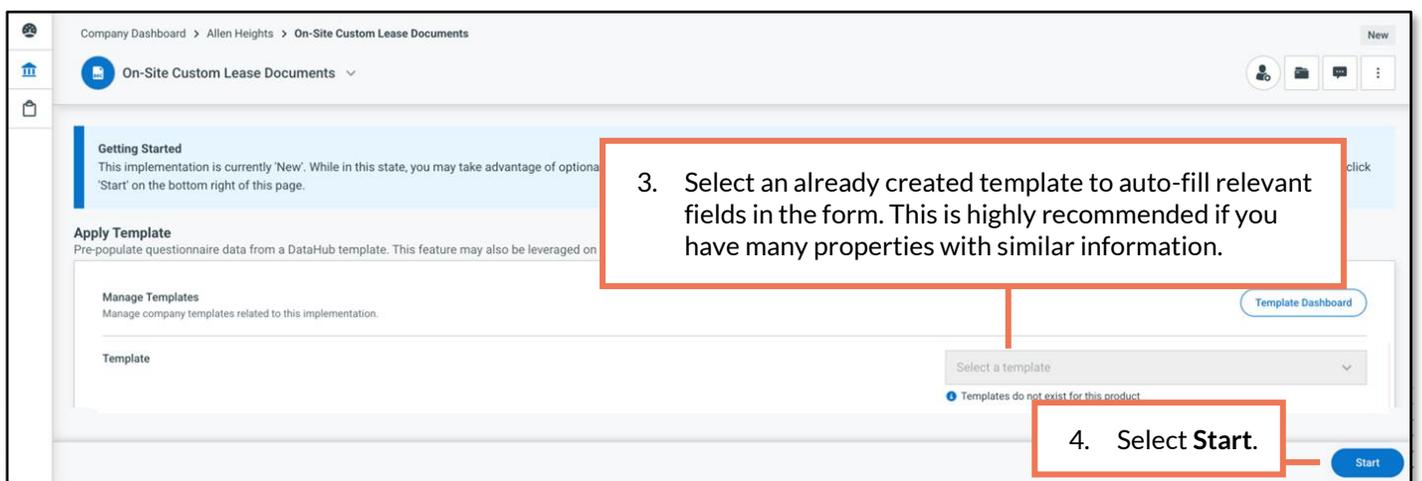
2. Select a form under **Implementations** to open the DataHub/Onboarding form.

Form Statuses:
- **New**: Form has not been started yet.
- **In Progress**: Form has been started but not submitted.
- **Under Review**: Form is complete and now on RealPage to review.

3. Select an already created template to auto-fill relevant fields in the form. This is highly recommended if you have many properties with similar information.

4. Select **Start**.

Fill Out Onboarding Forms

Comments: Option to add comments where questions/help is needed.

Validation Failures: Fields that are required to be filled out to move forward.

The left-hand side will show the different pages that need to be filled out.

Shared Fields: Information that will be shared with other RealPage DataHub forms in the future.

1. Select one of the options under **Page Summary** (red box) to start filling out the necessary info for each page.
2. Once all info is filled out, it should show **Valid** under **Validation Failures**.
3. Select **Submit** when done.
4. Confirm data is correct and note that the form will become read-only.
5. Repeat the steps for each form under the **Implementations** section for each property.

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