Use Portals to Connect to Your Community

Tenant Portal & Online Waiting Lists in Kanso

July 31st, 2024, at 2:45 P.M.

Main Room

ⓘ Slides will be shared at kansosummit.com post-event.

What we will cover in this session:

- Benefits of a Tenant Portal
- Tenant Portal Forms
- Tenant Payments - Intro to Uflex
- HDS Queue
- Future of Portals at Kanso

About the Speakers

Townsend Wardlaw - VP of Sales & Marketing

Educating and leading the charge of our marketing and sales teams, Townsend comes to Kanso with years of experience in building relationships with clients that extend far beyond the normal sales structure.

Joe Prince - Operations Manager

Joe's years of dedication to Kanso and its partners has bolstered his ability to oversee and advocate for the needs of our clients and the teams that work with them directly.

Joe Moore - SR Developer

Joe's development career started at Kanso, as such a fast and capable learner, it landed him a role as a respected senior developer on the team with a passion for creating quality features that customers love.

Aaron McIlwaine - Data Conversion Specialist

With nearly six years of dedication to Kanso and navigating the conversion of data, data fixes, delivery of client sites, and more, Aaron is a wizard at understanding the underlying importance of housing data and compliance.

Benefits of a Tenant Portal
Advantages for Housing Management

Reduced administrative workload	Enhanced communication with tenants	Better data accuracy and security	Improved tenant satisfaction and engagement
Automation of Routine Tasks: ● **Example:** Automated processing of rent payments, work orders, and form submissions reduces the need for manual entry and oversight. **Self-Service Capabilities for Tenants:** ● **Example:** Tenants can view their account balance, historical transactions, and submit maintenance requests independently. ● **Impact:** Decreases the volume of inquiries and requests that staff need to handle, leading to quicker resolution times.	**Centralized Communication Platform:** ● **Example:** The portal serves as a single point of contact for all tenant communications via community announcements. ● **Impact:** Ensures all tenants receive consistent information and reduces the risk of miscommunication. 	**Automated Data Verification:** ● **Example:** The system automatically verifies tenant information against existing records. ● **Impact:** Enhances data integrity and reduces the likelihood of discrepancies. **Audit Trails:** ● Improves transparency and accountability within the housing authority.	**Convenience and Accessibility:** ● **Example:** Tenants can access their information and services from any device, anytime. ● **Impact:** Increases tenant satisfaction by making it easier for them to manage their housing needs. **Transparent Processes:** ● **Example:** Tenants can track the status of their maintenance requests and account balances. ● **Impact:** Builds trust by providing transparency in housing operations.

Getting Started w/ Kanso Tenant Portal

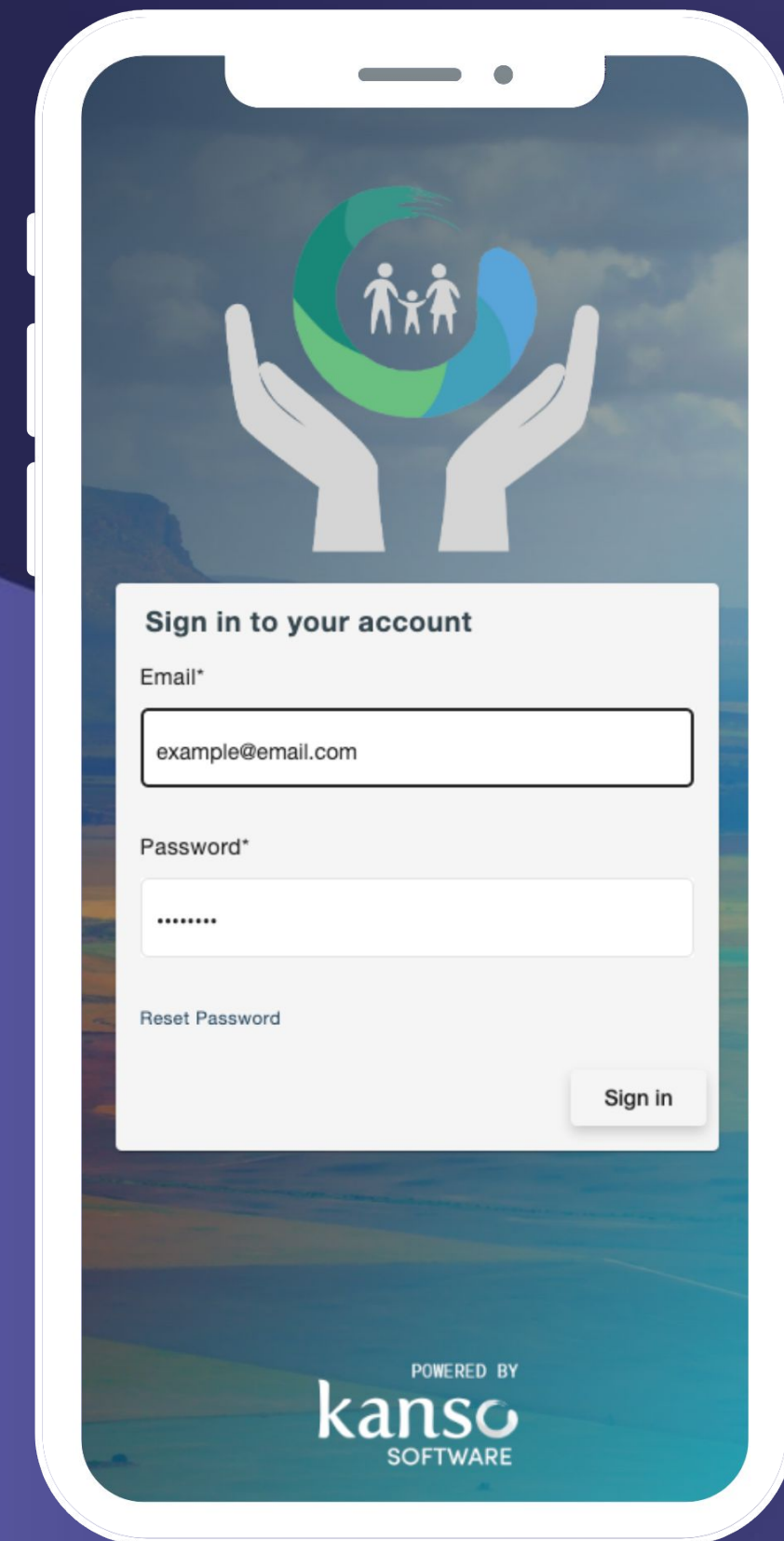## Coordinate with Kanso Client Success to Register

- Premium Kanso packages include the tenant portal, but it can be added to your Kanso package a la carte. Contact a support member for more information.
- A Kanso CS member will work with your organization to setup a custom Tenant Portal to include your own logo, or to use the one we provide.
- The portal comes with a custom URL you can include on your website or any tenant facing information.
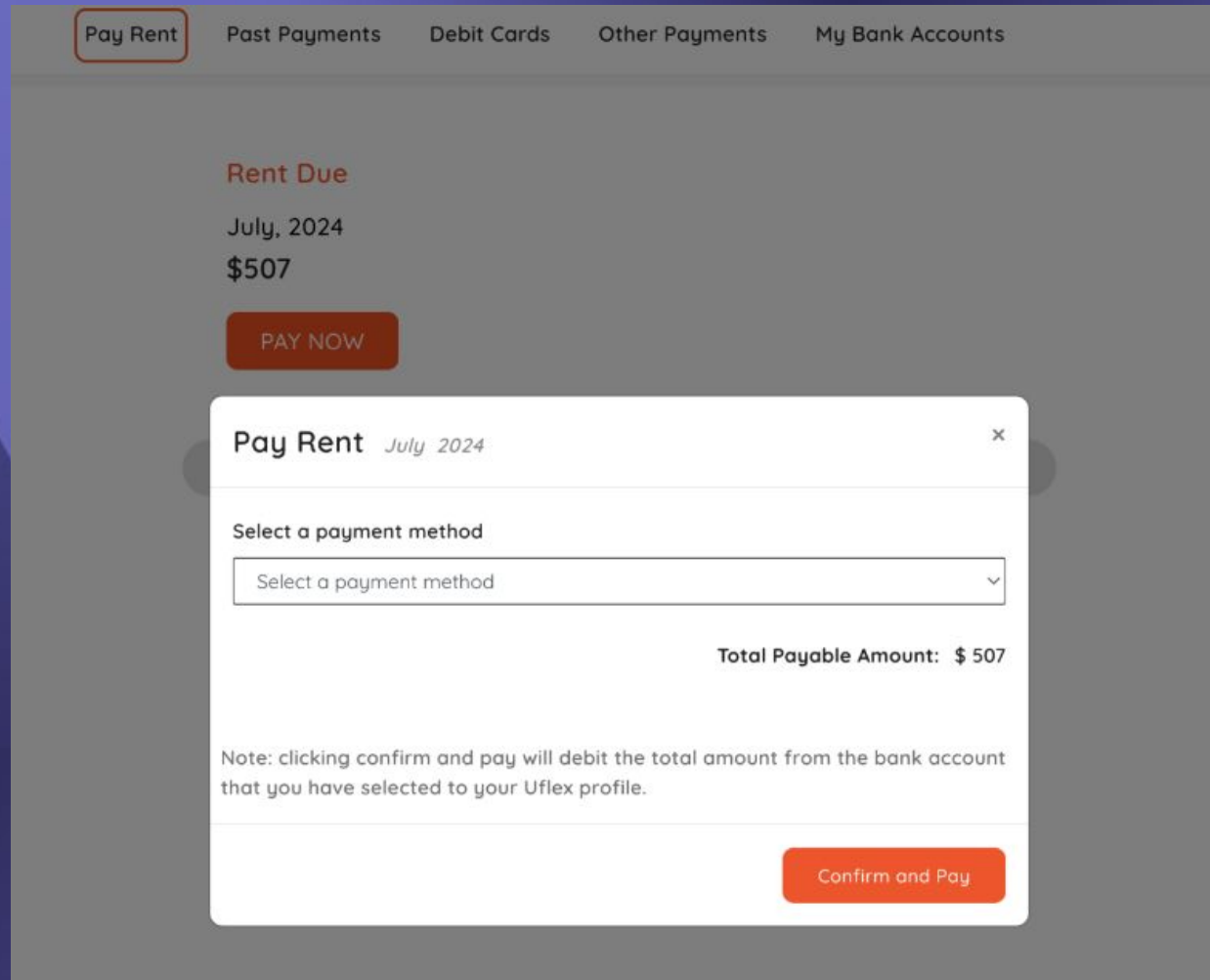
Secure Invitation from Kanso Site

- Send an invite to register for the tenant portal from the household page in Kanso.
- This sends, via email, a unique URL to the tenant's primary email address that expects specific registration information in order for a tenant to gain access to their account.

Tenants can register from a computer or a mobile device

- After confirming their information and setting up a login, they will receive a verification code that must be entered to gain access.
- From there tenants can reap the benefits of utilizing the Tenant Portal!

Tenant Rent & UFlex
Your Money Your Terms

Collecting rent is made easy in the Kanso Tenant Portal! If the tenant has a balance due, this will be displayed in their portal, and a "Make a Payment" button will be available. This button is highly configurable to your organizations needs.

Current Solutions

- Stripe Integration
  - $ fee absorbed by Housing Authority
  - Tenant name, address, and account information is sent to Stripe for reporting.
- Unique URL
  - Some organizations like to work directly with their banks or other payment intake providers. Simply configure the URL in Kanso to route the button to any site.

UPCOMING - Uflex:

- Phase 1
  - Unique URL configured to "Make a Payment" button.
  - Register with UFlex and experience fast and low cost payment intake processing all while supporting a small business!
- Phase 2 - Direct API Integration
  - With enough interest and user adoption, our teams will further our partnership by increasing data transferred from Tenant Portal to UFlex, and eventually right into your Kanso site.

UFlex will provide your organization a letter to send to residents about the program.

The registration process is simple and straightforward

They've created videos to help walk residents through the process.

Interesting in joining the beta group for the UFlex rollout? Reach out to Client Success Rep Emilio! emilio@kansosoftware.com
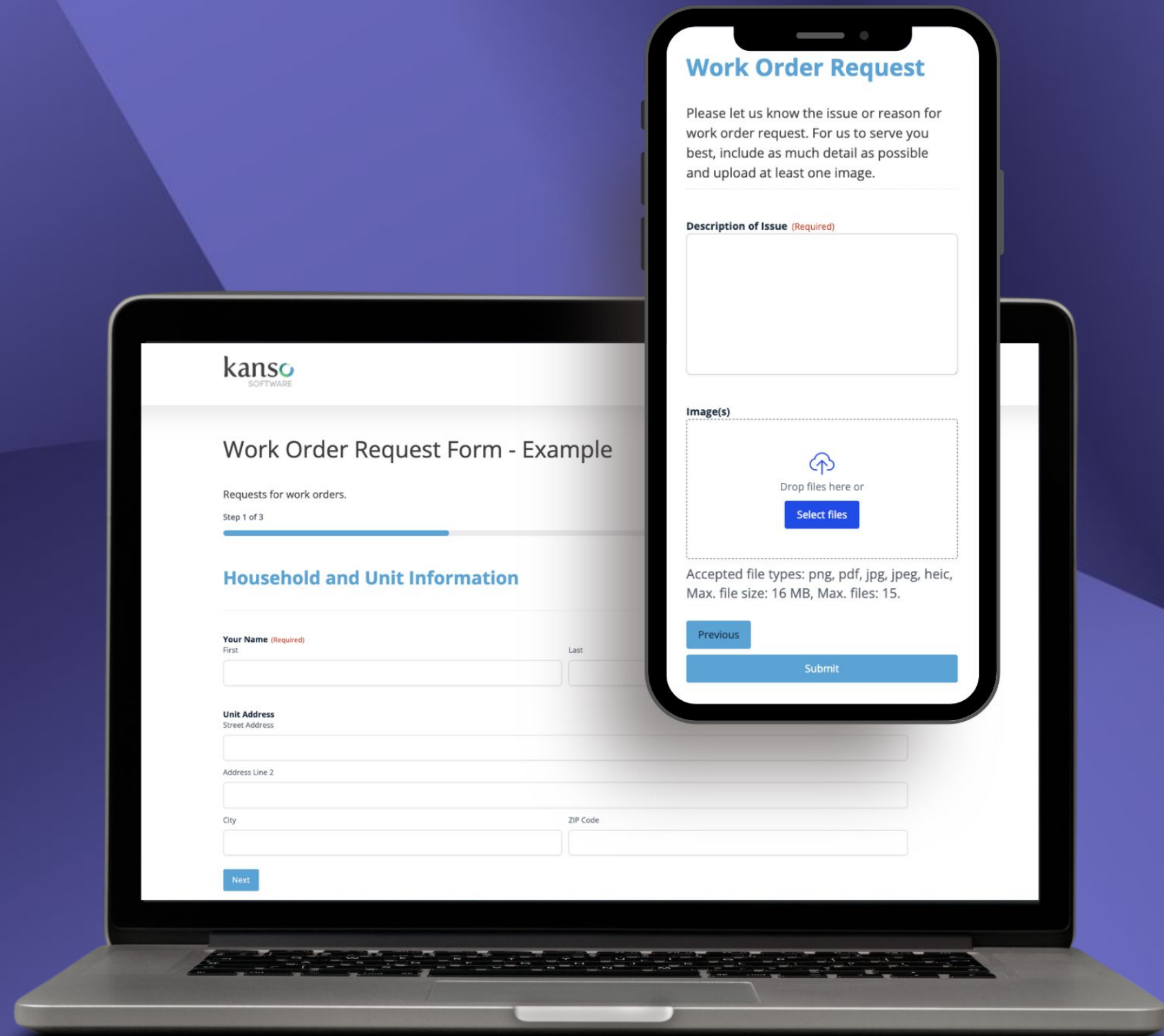
NEW - Tenant Portal Forms

Customizable Forms for Tenant Information Gathering

Enhance Tenant Communication:

- Streamline interactions and gather essential information effortlessly.

Who Can Benefit?

- Current clients wanting to improve engagement and prospective clients looking to optimize tenant management.
- Clients who want an immediate increase in Tenant Portal features, without waiting for integrated solutions on the product roadmap.
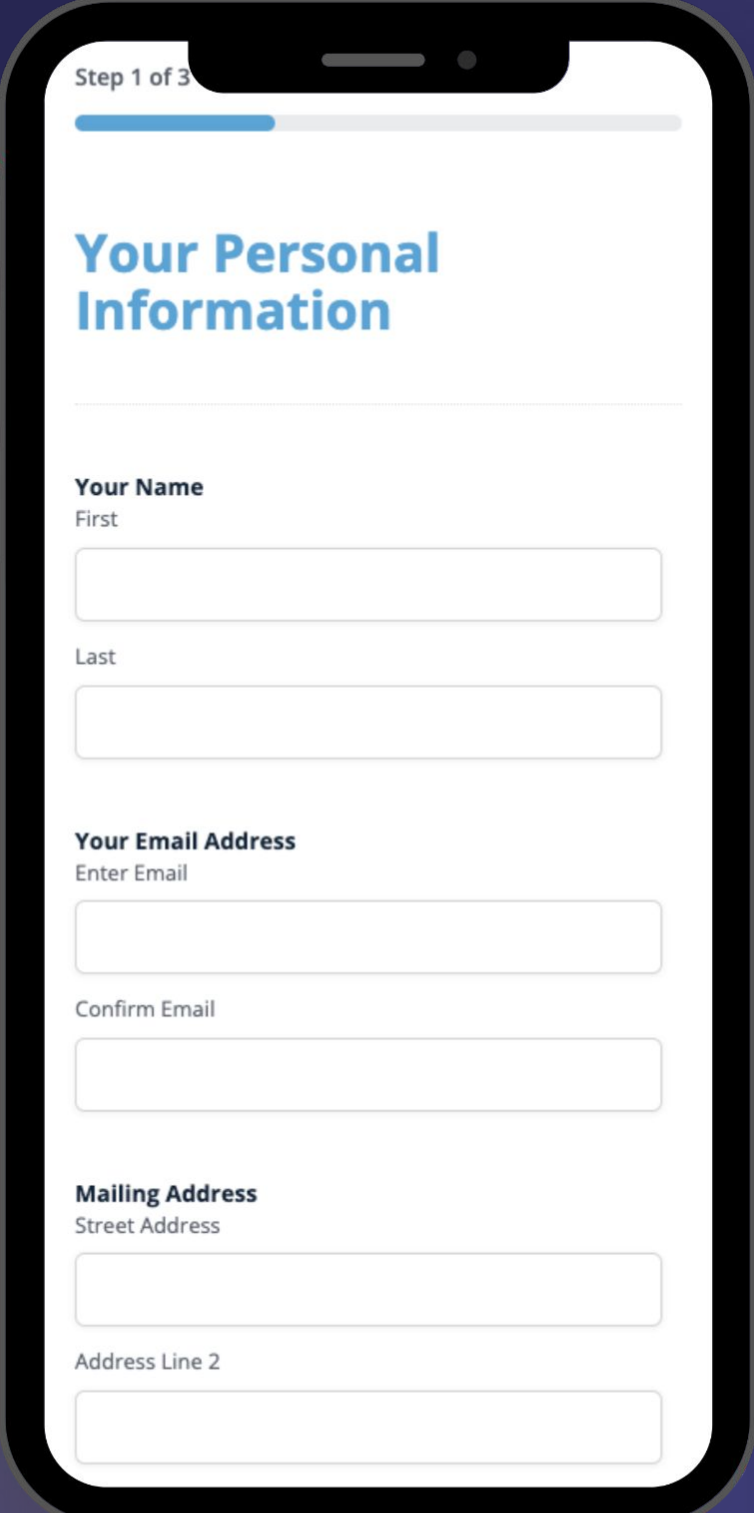
Getting Started with Forms

Form Setup

- **Client Success Team** manages requests for custom and default forms.
- **Default Forms** - next slide - are included with Tenant Portal
- **Pro Services:** Additional costs for complex forms or custom branding.

Getting Started

- Provide an example form or list of questions you want to ask your tenants
- Provide an email address for submissions to be sent to.
  - These can be different for each form template.
- Branding assets (logo and color palette) for customization outside of any Kanso branding.

Submit a ticket to get tenant portal pricing information or to get started with the new forms feature.

Step 1 of 3

Your Personal Information

Your Name
First

Last

Your Email Address
Enter Email

Confirm Email

Mailing Address
Street Address

Address Line 2

Default Tenant Portal Forms
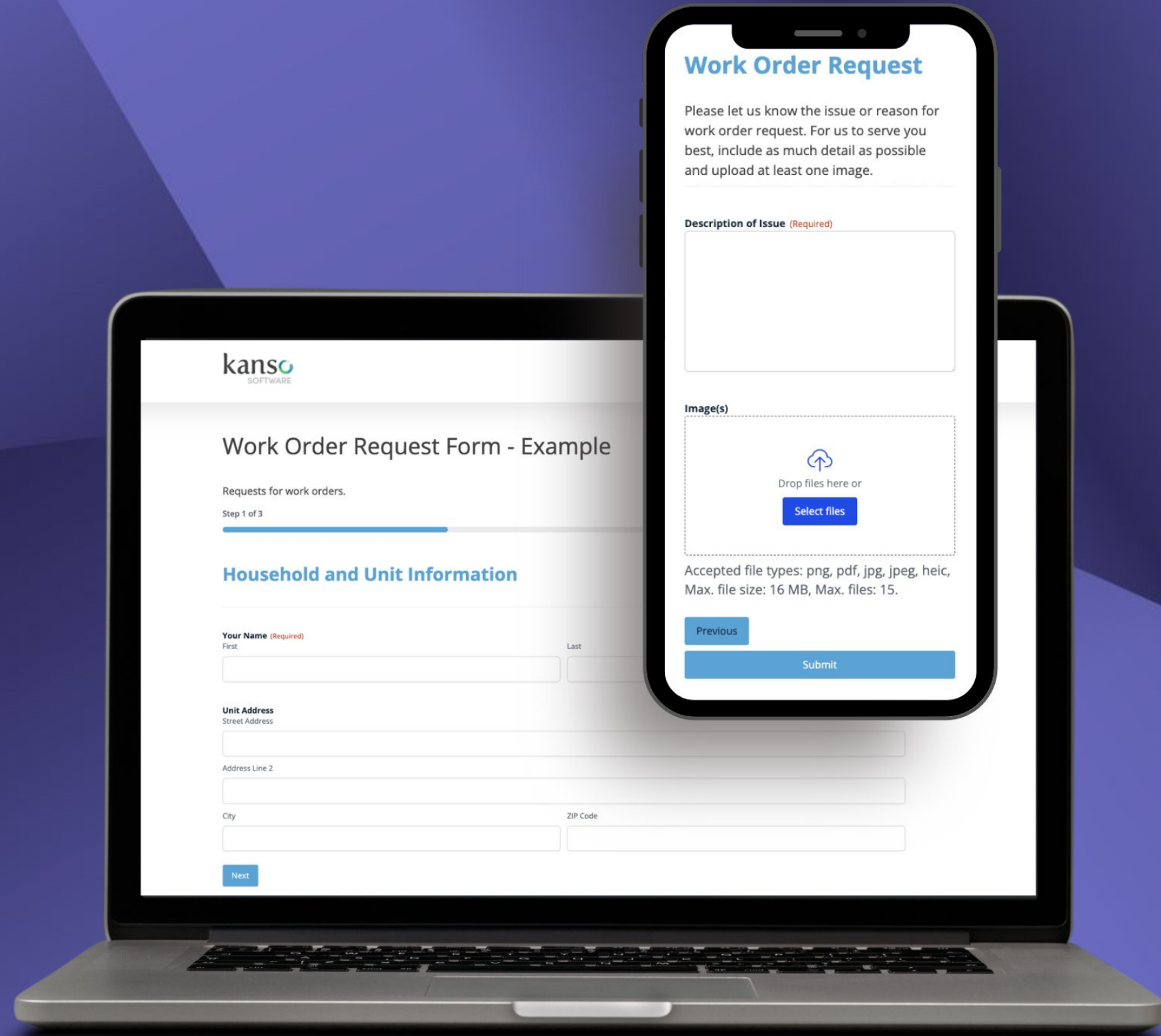
Waiting List Application

Prospective or current tenants can easily apply, providing all required details and documents in one place, making it easier for you to intake applications efficiently.

Recertification Information Submissions

Simplify the process of collecting annual certifications from your tenants with our Annual Certification Submission form. This form allows tenants to submit necessary documents and information securely, streamlining compliance and ensuring accurate record-keeping.

Work Order Requests

Tenants can detail their requests or issues, upload photos, and update contact information. This request can then be reviewed and approved by a team member before copying into the Kanso system.

Kanso Queue - Online Waiting Lists

HDS's Online Waiting List Application is now Compatible with Kanso!

Streamlined Management:

- **Fair Online Lotteries** for Voucher, Low Rent, and more—no in-person queues.
- **Flexible Control**: Easily manage registration dates and applicant limits.
- **Direct Access** from your website.
- **Scheduled Imports** to round out an integration with Kanso.

Getting Started with Kanso Queue

Contact our Client Success team to setup a unique URL and application questions.

- Set values that would result in automated application rejections
- Choose a schedule for import to your Kanso site

Pricing

Lottery Based WL (One-Time import)

- $950 setup
- $1.50 per applicant imported (One-Time import)

Perpetual

- $950 setup
- $400 monthly/monthly import

The Future of Portals & Kanso

Tenant Portal Enhancements

- Work Order requests integrated with Kanso system for review, approval, and then scheduling.
- Document management/sharing including signatures and document status.

Landlord & Applicant Portal

- An expansion to our portals that allow tenants to apply to multiple waiting lists, application status tracking, and to store household information to be updated and imported into the Kanso system. For Landlords, this grants visibility to documents, payables, inspections, and more!

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A Gathering Place

Wagenlander & Heisterkamp, LLC
Attorneys at Law

UFlex
Your Money Your Terms

Summit Agenda - July 31st

- 4:00pm - Closing & Thank You

- 4:30 - Reception at ART Hotel & Live Music