

# Owner Portal Guide

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### **PURPOSE**

The purpose of this document is to review the features associated with the Owner Portal.



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## Owner Portal

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Use your portal to access real-time information regarding your rental properties. The Owner Portal allows you to:

- View your statements and reports online.
- Communicate with the management team.
- View alerts for unpaid bills.
- Approve or reject work orders.
- Update contact information.
- Add a payment profile for electronic debits and credits.

### Logging to Your Portal

You need an email address to access your portal. Your property manager sends an email with login instructions to the portal. Generally, your email address is the username.

A screenshot of the 'OWNER ONLINE ACCOUNT ACCESS' login page. The page is split into two main sections. On the left is a grey login form with the heading 'Login Again' and a lock icon. It contains two input fields for 'Email Address' and 'Password', a 'Sign In' button, a link for 'Forgot your password?', and a 'Don't have an Account?' section with a 'Sign up' button. On the right is a large image showing a person's hands holding a magnifying glass over a document with a bar chart. The text 'REAL-TIME VISIBILITY' is visible at the bottom of the image.

If you lose or forget your password, use the **Forgot Your Password?** link to request a new password. You need to provide your first and last names and email. Enter the same email address that your property manager has on file.



## Signing up for Owner Account

Sign up for your Owner Portal account at the property management company website.

From the Owner Portal link, click the **Sign up** button.

**Don't have an Account?**  
Signing up is easy, fast and secure.

**Sign up**

Fill out all the required fields and click the **Submit** button. The information you submit must match to the information on your property management company file.

### Signup

Signup to receive a login account

First Name	<input type="text"/>
Last Name	<input type="text"/>
Email	<input type="text"/>
Address	<input type="text"/>
Address 2	<input type="text"/>
City	<input type="text"/>
State/Province	<input type="text"/>
Zip/Postal Code	<input type="text"/>
Comments	<input type="text"/>

After you submit, you receive an email with login instructions from your property management team.



Login to your portal account to access personalized information published by the property management team.

My Contact Information		<a href="#">View Detail</a> <a href="#">Edit</a> <a href="#">Change Email/Password</a>
Home Phone	866-793-6763	
Work Phone	866-793-6763	
Mobile Phone	866-793-6763	
Email	asilverthorne@propertyware.com	

Conversations		<a href="#">New Conversation</a>
Sina Shekou 3/17/09 7:45:27 AM	<a href="#">How does your statement look?</a> Does it look correct this month?	1 Comment(s)
Sina Shekou 1/11/09 12:4:13 AM	<a href="#">I love this service!!!!</a> Thank you! We love you too.	2 Comment(s)
Mrs. Margaret Ellis 1/10/09 11:57:19 PM	<a href="#">Work Order #10</a> they finally got it done thanks	3 Comment(s)
Mrs. Margaret Ellis 9/10/08 9:26:19 AM	<a href="#">Work Order #2</a> Thank you for taking care of this!	3 Comment(s)

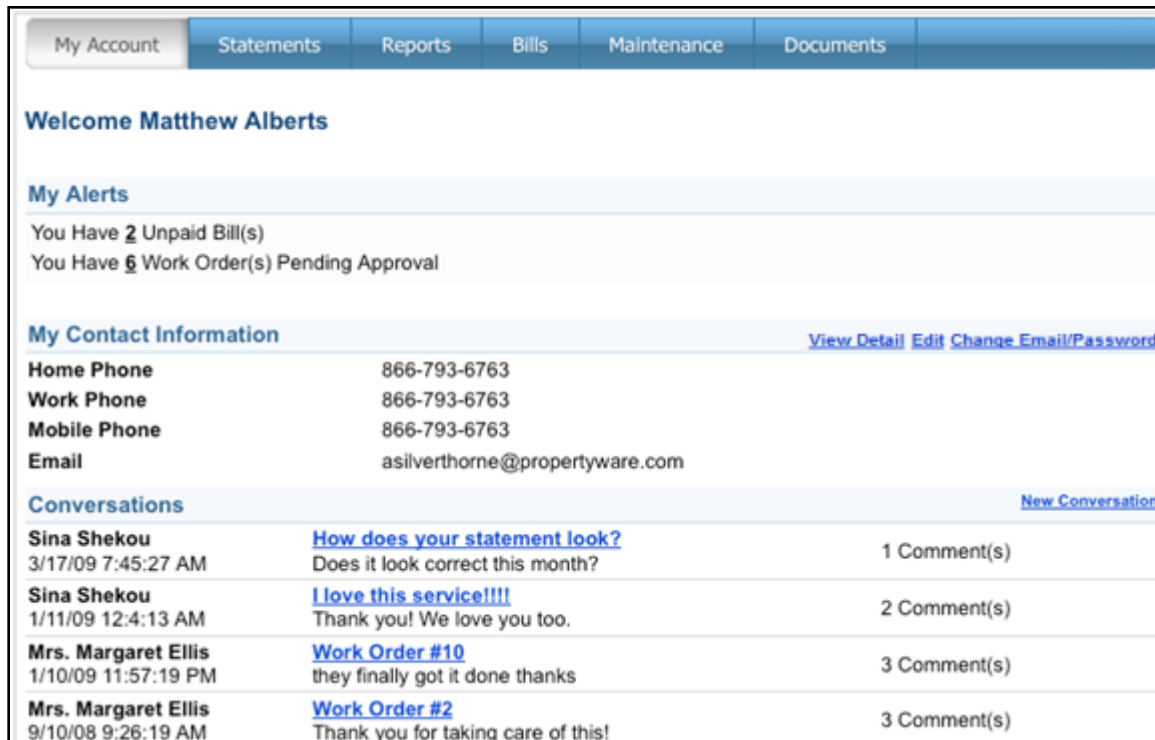
### Owner Portal Navigation Tabs

The Owner Portal has navigation tabs on the top as shown below. Click a tab to select it. The selected tab changes to white.



## My Account

Use the **My Account** screen to view your contact information, alerts for unpaid bills and work orders waiting to be approved, and conversations with the property management team. The **My Account** screen is made up of three sections: **My Alerts**, **My Contact Information**, and **Conversations**.



The screenshot shows the 'My Account' dashboard with the following sections:

- Navigation Tabs:** My Account (selected), Statements, Reports, Bills, Maintenance, Documents.
- Welcome Message:** Welcome Matthew Alberts
- My Alerts:**
  - You Have **2** Unpaid Bill(s)
  - You Have **6** Work Order(s) Pending Approval
- My Contact Information:**
  - Home Phone: 866-793-6763
  - Work Phone: 866-793-6763
  - Mobile Phone: 866-793-6763
  - Email: asilverthorne@propertyware.com
- Conversations:**

Sender	Message	Comments
Sina Shekou 3/17/09 7:45:27 AM	<a href="#">How does your statement look?</a> Does it look correct this month?	1 Comment(s)
Sina Shekou 1/11/09 12:4:13 AM	<a href="#">I love this service!!!!</a> Thank you! We love you too.	2 Comment(s)
Mrs. Margaret Ellis 1/10/09 11:57:19 PM	<a href="#">Work Order #10</a> they finally got it done thanks	3 Comment(s)
Mrs. Margaret Ellis 9/10/08 9:26:19 AM	<a href="#">Work Order #2</a> Thank you for taking care of this!	3 Comment(s)

### Viewing Alerts for Unpaid Bills and Work Orders

The **My Alerts** section shows links to unpaid bills and work orders waiting your approval. Click a number link to go directly to the **Bills** or **Maintenance** screen.



The 'My Alerts' section displays:

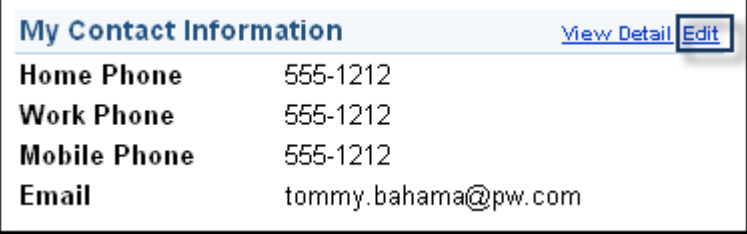
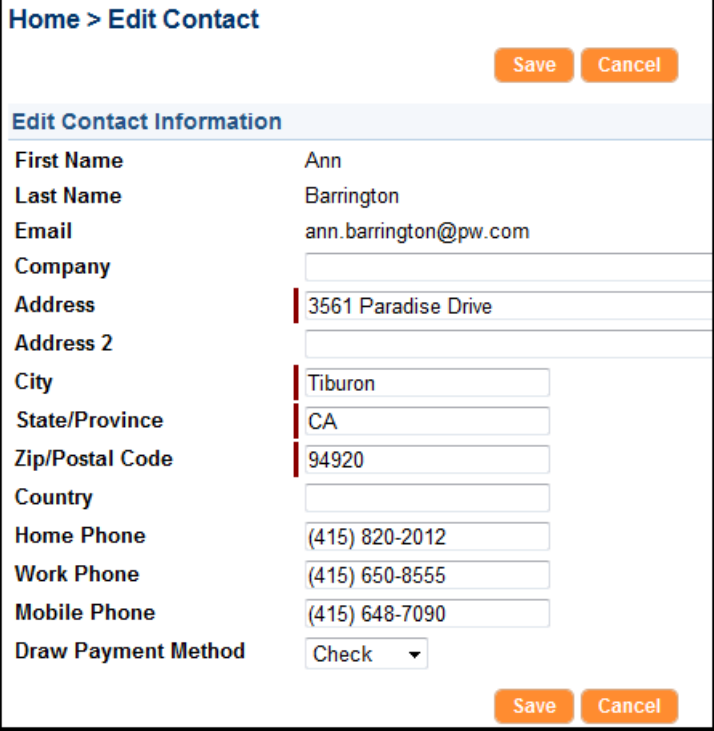

- You Have **2** Unpaid Bill(s)
- You Have **6** Work Order(s) Pending Approval

A box labeled 'Links' has arrows pointing to the numbers 2 and 6, indicating they are clickable links.

If there are no alerts, **My Alerts** displays **No Unpaid Bills** and **No Work Orders Pending Approval**.

### Updating Contact Information

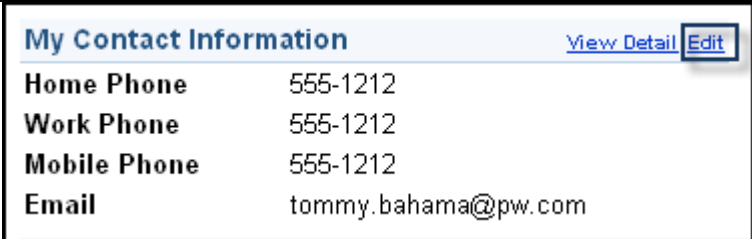
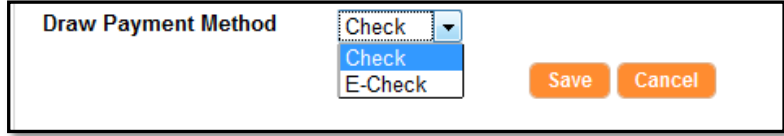

The **My Contact Information** section displays your contact information. You can use the **Edit** link to update your contact information.

Step	Action/Screen
<p>From the <b>My Account</b> screen, click the <b>Edit</b> link.</p>	 <p>The screenshot shows the 'My Contact Information' section with the following details: Home Phone: 555-1212, Work Phone: 555-1212, Mobile Phone: 555-1212, and Email: tommy.bahama@pw.com. There are 'View Detail' and 'Edit' links in the top right corner.</p>
<p>Update the relevant fields. Choose the <b>Draw Payment Method: Check</b> or <b>E-Check</b> to setup the payment account.</p>	 <p>The screenshot shows the 'Home &gt; Edit Contact' screen. It includes 'Save' and 'Cancel' buttons at the top right. The 'Edit Contact Information' section contains the following fields: First Name (Ann), Last Name (Barrington), Email (ann.barrington@pw.com), Company (empty), Address (3561 Paradise Drive), Address 2 (empty), City (Tiburon), State/Province (CA), Zip/Postal Code (94920), Country (empty), Home Phone ((415) 820-2012), Work Phone ((415) 650-8555), Mobile Phone ((415) 648-7090), and Draw Payment Method (Check with a dropdown arrow). 'Save' and 'Cancel' buttons are at the bottom right.</p>
<p>Click the <b>Save</b> button.</p>	 <p>A close-up screenshot of the 'Save' and 'Cancel' buttons. A mouse cursor is clicking on the 'Save' button.</p>



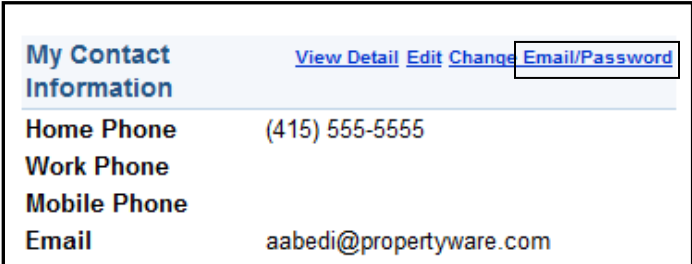
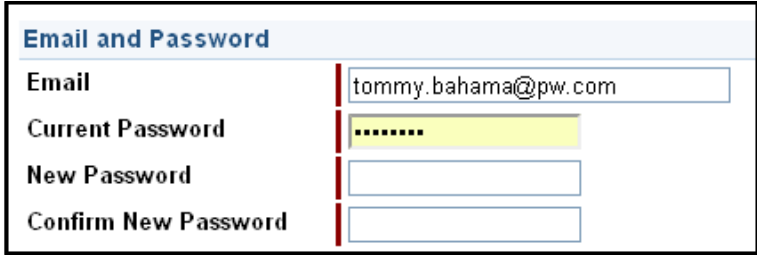
### Editing Payment Account Information

Use the **Edit** link to change your payment method.

Step	Action/Screen
From the <b>My Account</b> screen, click the <b>Edit</b> link.	
Choose the <b>Draw Payment Method: Check or E-Check</b> .	
Click the <b>Save</b> button.	

### Changing Email and Password

To change your email and password, click the **Change Email/Password** link.

Step	Action/Screen
From the <b>My Contact Information</b> section, click the <b>Change Email/Password</b> link.	
Update the email address and password. Enter your existing password in the <b>Current Password</b> field. To create a new password, enter it in both the <b>New Password</b> and <b>Confirm New Password</b> fields.	

Click the <b>Save</b> button.	
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### Viewing and Deleting Conversations


Your Owner Portal allows you to view and initiate new conversations related to the management of your rentals. The **Conversations** section in **My Account** displays:

- Conversations between your property managers and tenants
- Your conversations with the property managers

Conversations		<a href="#">New Conversation</a>
<b>Sina Shekou</b> 3/17/09 7:45:27 AM	<a href="#">How does your statement look?</a> Does it look correct this month?	1 Comment(s)
<b>Sina Shekou</b> 1/11/09 12:4:13 AM	<a href="#">I love this service!!!!</a> Thank you! We love you too.	2 Comment(s)
<b>Mrs. Margaret Ellis</b> 1/10/09 11:57:19 PM	<a href="#">Work Order #10</a> they finally got it done thanks	3 Comment(s)
<b>Mrs. Margaret Ellis</b> 9/10/08 9:26:19 AM	<a href="#">Work Order #2</a> Thank you for taking care of this!	3 Comment(s)

Subject Link

The **Conversations** section contains only active conversations. The column on the left displays the last person who has commented along with date and time the comment is posted. Click the subject link to view the list of comments.

	<b>Note</b>
<p>The conversations between your property manager and the tenant are in read-only mode. This means you can view the conversation but cannot participate.</p>	

To delete a conversation from your account:

1. Move your mouse over the conversation. This brings up a **Close** link.
2. Click the **Close** link to delete the conversation.

Conversations		<a href="#">New Conversation</a>
<b>Aliya Abedi</b> 6/23/11 4:4:39 PM	<a href="#">Reports</a> Still waiting to hear about the report changes.	1 Comment(s) <a href="#">Close</a>

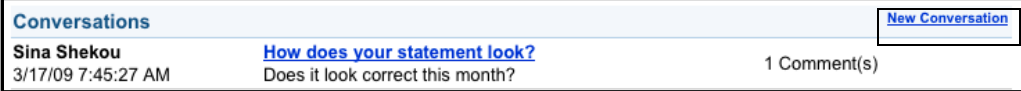
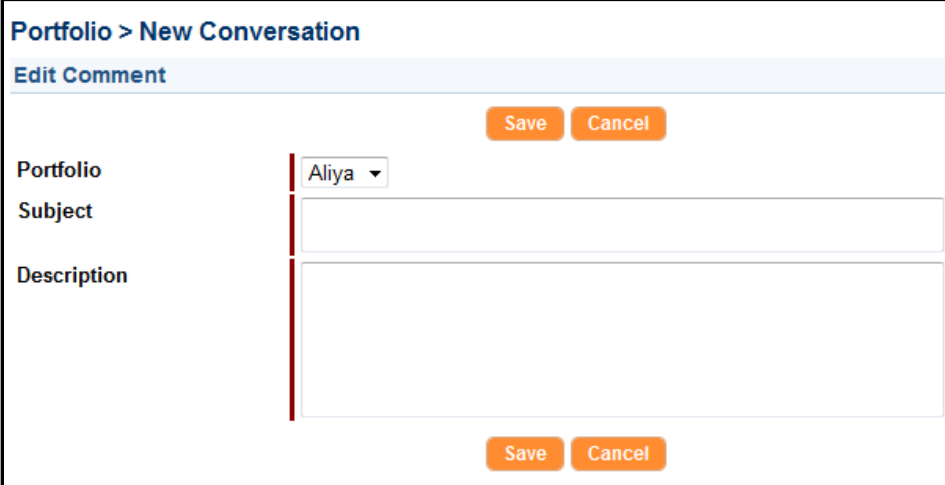

## Adding New Comments to Conversations

To add a new comment to an existing conversation, perform the steps shown below:

Step	Action/Screen
<p>Click the link which is the subject of the conversation to bring up the threaded comments in the conversation.</p>	
<p>Click the <b>New Comment</b> button to add a comment to the conversation.</p>	
<p>Click the <b>Save</b> button to post your comment.</p>	

## Creating New Conversations

Anytime a conversation is created or updated with a new comment, the participants are notified immediately via an email.

Step	Action/Screen
Click the <b>New Conversation</b> link.	
Click the <b>New Comment</b> button to add a comment to the conversation.	
Click the <b>Save</b> button to post your comment.	



## Statements


Use the **Statements** tab to view your statements, and all draws and contributions that have been made in and out of your portfolio. You can also make new contributions to your account.

My Account	Statements	Reports	Bills	Maintenance	Documents	
<b>Statements</b>						
<b>Summary</b>						
Address	Unit	Last Payment Date	Deposit Held	Total Unpaid	Balance	Action
40 Cervantes Blvd Unit 1	Unit 1	01/24/2011	\$2,000.00	\$19,725.00	\$19,725.00	-- Choose --
26891 La Alameda	UnitB	01/24/2011	\$0.00	\$0.00	\$0.00	-- Choose --
<b>Draws and Contributions</b>						
Portfolio	Date	Ref #	Type	Account	Amount	
Barrington	03/31/2011		Check	Owner Draw	\$6,090.00	
Barrington	02/28/2011		Check	Owner Draw	\$6,490.00	
Barrington	01/31/2011		Check	Owner Draw	\$6,090.00	
Barrington	12/31/2010		Check	Owner Draw	\$5,690.00	
<a href="#">New Contribution</a>						

## Viewing Owner Statements

To view your owner statement, choose the **View** option from the **Action** dropdown menu.

Statements									
Portfolio	Date	Beg. Balance	Income	Expense	Mgmt Fee	End Balance	Port. Minimum	Due To Owner	Action
Barrington	06/01/2011 - 06/30/2011	\$10,550.00	\$0.00	\$0.00	\$0.00	\$10,550.00	\$250.00	\$9,900.00	<input type="button" value="-- Choose --"/> <input type="button" value="-- Choose --"/> <input type="button" value="View"/>

This step opens the Statement as a PDF  document.

Ann Barrington 3561 Paradise Drive Tiburon CA 94920		<b>OWNER STATEMENT</b>	
	Period Start Date	06/01/2011	
	Period End Date	06/30/2011	
<b>Portfolio Summary</b>			
Previous Balance			\$10,550.00
Ending Balance			\$10,550.00
Current Balance			\$10,550.00
Unpaid Bills			\$400.00
Effective Balance			\$10,150.00
Portfolio Minimum			\$250.00
		Month-To-Date	Year-To-Date
	Beginning Balance as of 06/01/2011		Balance
			\$10,550.00
<b>Income</b>			
Rent		\$0.00	\$30,900.00
Utilities		\$0.00	\$800.00
Total Income		\$0.00	\$31,500.00

If your computer does not have Adobe Acrobat installed, download it from <http://get.adobe.com/reader/>.

## Reports

Use the **Reports** tab to view all reports regarding the management of your rental properties. All published reports use real-time data.

My Account	Statements	Reports	Bills	Maintenance	Documents
<b>Reports</b>					
Portfolio	Name	Description	Action		
Aliya	Unit Inventory	A list of all active units under management.	-- Choose --		
Aliya	Units - Vacant Unit Loss	A list of vacant units with a total of target rent.	-- Choose --		

### Viewing Reports

To view a report, locate the report in the list of reports. Select the **View** option from the **Action** dropdown menu.

My Account	Statements	Reports	Bills	Maintenance	Documents
<b>Reports</b>					
Portfolio	Name	Description	Action		
Barrington	Units - Vacant Unit Loss	A list of vacant units with a total of target rent.	-- Choose --		
Barrington	Accts. Payable- Unpaid Bills	A list of all unpaid bills	-- Choose -- View		

Here is a sample of a published report:

<b>Unit Inventory</b>								
A list of all active units under management.								
Avg. Monthly Rent	Max. Monthly Rent	Min. Monthly Rent	Total Days Vacant	Total Monthly Rent	Total Target Rent			
<b>\$1,200.00</b>	<b>\$1,200.00</b>	<b>\$1,200.00</b>	<b>0.0</b>	<b>\$1,200.00</b>	<b>\$1,200.00</b>			
Portfolio Name	Building Name	Number Floors	Building Amenities	Unit Name	Type	Total Area	% of Building Sq Ft	Floor Number
Aliya	Bldg	1		Bldg	Business Office	1000.0	100.00%	1

## Bills

Use the **Bills** tab to access all bills and payments that have been recorded towards your rental properties. These bills include a breakdown of the expense line items, descriptions, and invoices from vendors in case the property manager scans and attaches invoices to bills.

The footer filter allows you to increase or decrease the number of items shown and navigate among pages.

My Account	Statements	Reports	Bills	Maintenance	Documents				
<b>Bills</b>									
<b>My Bills</b>									
				Period: <input type="text" value="This Year"/>	<input type="button" value="Go"/>	Paid/Unpaid: <input type="text" value="All"/>			
Bill #	Bill Date	Vendor	Building	Unit	Status	Due Date	Amount	Amount Paid	Action
47	03/31/2011	Propertyware Documentation	- Split -		Unpaid	03/31/2011	\$710.00	\$0.00	<input type="button" value="-- Choose --"/>
45	03/27/2011	Perrone Landscaping			Unpaid	04/26/2011	\$400.00	\$0.00	<input type="button" value="-- Choose --"/>
44	02/28/2011	Propertyware Documentation	- Split -		Unpaid	02/28/2011	\$710.00	\$0.00	<input type="button" value="-- Choose --"/>
43	01/31/2011	Propertyware Documentation	- Split -		Unpaid	01/31/2011	\$710.00	\$0.00	<input type="button" value="-- Choose --"/>
40	01/27/2011	Perrone Landscaping			Unpaid	02/26/2011	\$400.00	\$0.00	<input type="button" value="-- Choose --"/>
Show rows: <input type="text" value="50"/> 1 - 5 of 5 <input type="button" value="◀"/> <input type="button" value="▶"/>									





## Viewing Your Bills

To view the list of all bills applied towards your account:

Step	Action/Screen																				
Use the filters: <ul style="list-style-type: none"> <li>• <b>Period</b> to search for your bills by date</li> <li>• <b>Paid/Unpaid</b> to choose paid or unpaid, or both</li> </ul>																					
Select the <b>View Detail</b> option from the <b>Action</b> dropdown menu.	<table border="1"> <thead> <tr> <th>Bill #</th> <th>Bill Date</th> <th>Vendor</th> <th>Building</th> <th>Unit</th> <th>Status</th> <th>Due Date</th> <th>Amount</th> <th>Amount Paid</th> <th>Action</th> </tr> </thead> <tbody> <tr> <td>4</td> <td>06/29/2011</td> <td>AAA Plumbing</td> <td>37 Aztec Street</td> <td></td> <td>Unpaid</td> <td>06/29/2011</td> <td>\$50.00</td> <td>\$0.00</td> <td>-- Choose --</td> </tr> </tbody> </table>	Bill #	Bill Date	Vendor	Building	Unit	Status	Due Date	Amount	Amount Paid	Action	4	06/29/2011	AAA Plumbing	37 Aztec Street		Unpaid	06/29/2011	\$50.00	\$0.00	-- Choose --
Bill #	Bill Date	Vendor	Building	Unit	Status	Due Date	Amount	Amount Paid	Action												
4	06/29/2011	AAA Plumbing	37 Aztec Street		Unpaid	06/29/2011	\$50.00	\$0.00	-- Choose --												

This step displays the bill as shown below:

Bills > Bill# 45				
<a href="#">View Invoice</a>				
<b>Bill Detail</b>				
<b>Vendor</b>	Perrone Landscaping			
<b>Ref No.</b>				
<b>Bill Date</b>	03/27/2011			
<b>Due Date</b>	04/26/2011			
<b>Terms</b>	NET 30			
<b>Description</b>				
<b>Bill Splits</b>				
<u>Portfolio/Building</u>	<u>Unit</u>	<u>Account</u>	<u>Comments</u>	<u>Amount</u>
BARRINGTON		CLEANM - Cleaning and Maint...		\$400.00
<b>Total</b>				\$400.00
<b>Payments</b>				
<u>Date</u>	<u>Paid From</u>	<u>Payment Method</u>	<u>Amount</u>	
03/27/2011	1000 - Operating Bank Acc...	Check To Be Printed	\$400.00	



To view the attached invoice to the bill, click the **View Invoice** button located at the top of the screen.

**Perrone Landscaping** INVOICE

123 Main Street San Francisco, CA 94104 Phone 555-1212	DATE: 03/27/2011 INVOICE #: 45 FOR:
--	---

Bill To:  
Ann Barrington  
3561 Paradise Drive  
Tiburon CA 94920  
(415) 650-8555

LOCATION	DESCRIPTION	AMOUNT
BARRINGTON	CLEANM - Cleaning and Maint...	\$400.00
<b>TOTAL</b>		<b>\$400.00</b>

Make all checks payable to **Perrone Landscaping**

If you have any questions concerning this invoice, please contact **Perrone Landscaping** , 555-1212

THANK YOU FOR YOUR BUSINESS!

## Maintenance

Use the **Maintenance** tab to view all service requests submitted by tenants occupying your rentals, and work orders created by the management team. You can approve or reject a work order.

<span>My Account</span> <span>Statements</span> <span>Reports</span> <span>Bills</span> <span>Maintenance</span> <span>Documents</span>									
Maintenance									
My Work Orders							Status:	Open	Approved
WO #	Date Created	Location	Estimated / Actual Cost	Status	Approved		All	All	
2	05/20/2010	BARRINGTON   27TH	\$0.00 / \$0.00	Open	Yes	Leaky faucet	Open	Approved	
1	06/03/2011	BARRINGTON   AZTEC	\$50.00 / \$0.00	Closed	No		Closed	Unapproved	
							-- Choose --	-- Choose --	
Show rows: 50   1 - 2 of 2									

### Viewing Work Orders

All work orders created for your rentals are displayed on the **Maintenance** screen. Use the **Status** dropdown menus at the top of the screen to filter the list by open, closed, approved, or unapproved work orders. The footer options allow you to increase or decrease the number of items shown and navigate.

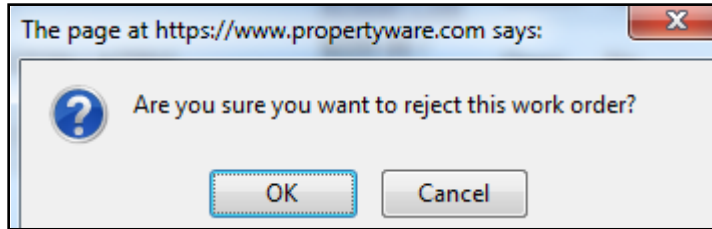
To view the detail of any work order, select the **View** option from the **Action** dropdown menu.

### Approving or Rejecting a Work Order

You can reject or approve a work order in the **My Work Orders** list. Choose **Approve** or **Reject** from the **Action** column dropdown menu.

<span>My Account</span> <span>Statements</span> <span>Reports</span> <span>Bills</span> <span>Maintenance</span> <span>Documents</span>									
Maintenance									
My Work Orders							Status:	All	Unapproved
WO #	Date Created	Location	Estimated / Actual Cost	Status	Approved	Description	Action		
1	06/03/2011	BARRINGTON   AZTEC	\$50.00 / \$0.00	Closed	No		-- Choose --		
4	06/24/2011	BARRINGTON   AZTEC	\$220.00 / \$0.00	Open	No		-- Choose --		
							-- Choose --		
							Approve	Reject	
Show rows: 50   1 - 2 of 2									

Click **OK** to confirm your action.




Once you take an action, the status of the work order is changed to **Closed**.

## Documents

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Use the **Documents** tab to open or download documents shared by your management company. When a new document is uploaded to the Owner Portal, you receive an email notification. Click the name of the document to open it.

My Account	Statements	Reports	Bills	Maintenance	Documents
<b>Portfolio Documents</b>					
<b>Documents</b>					
<u>File Name</u>		<u>Size</u>	<u>Uploaded</u>	<u>Uploaded by</u>	
 <a href="#">Sample Doc.pdf</a>		2932k	12/14/2009	sshekou	
<b>Lease Documents</b>					
<b>Documents</b>					
There are no Lease documents available					
<b>Other Documents</b>					
<b>Documents</b>					
There are no other documents available					

You must have the appropriate software on your computer to view the document.