Owner Portal Guide

Copyrights

Purpose

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

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Owner Portal

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.

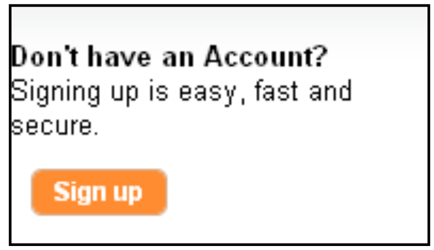
Logging to Your Portal

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.

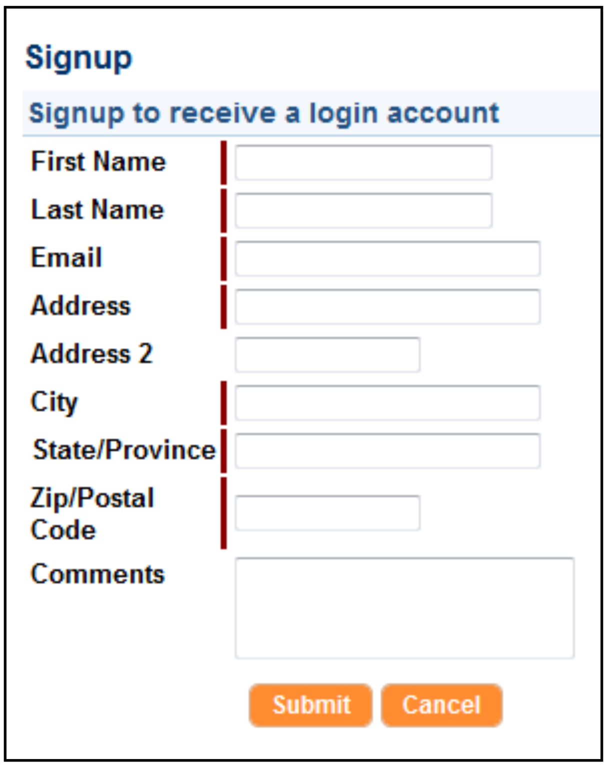
If you lose or forget your password, use the **Forgot Your Password**? link to request a new password. You need to provide your first and last names and email. Enter the same email address that your property manager has on file.

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.

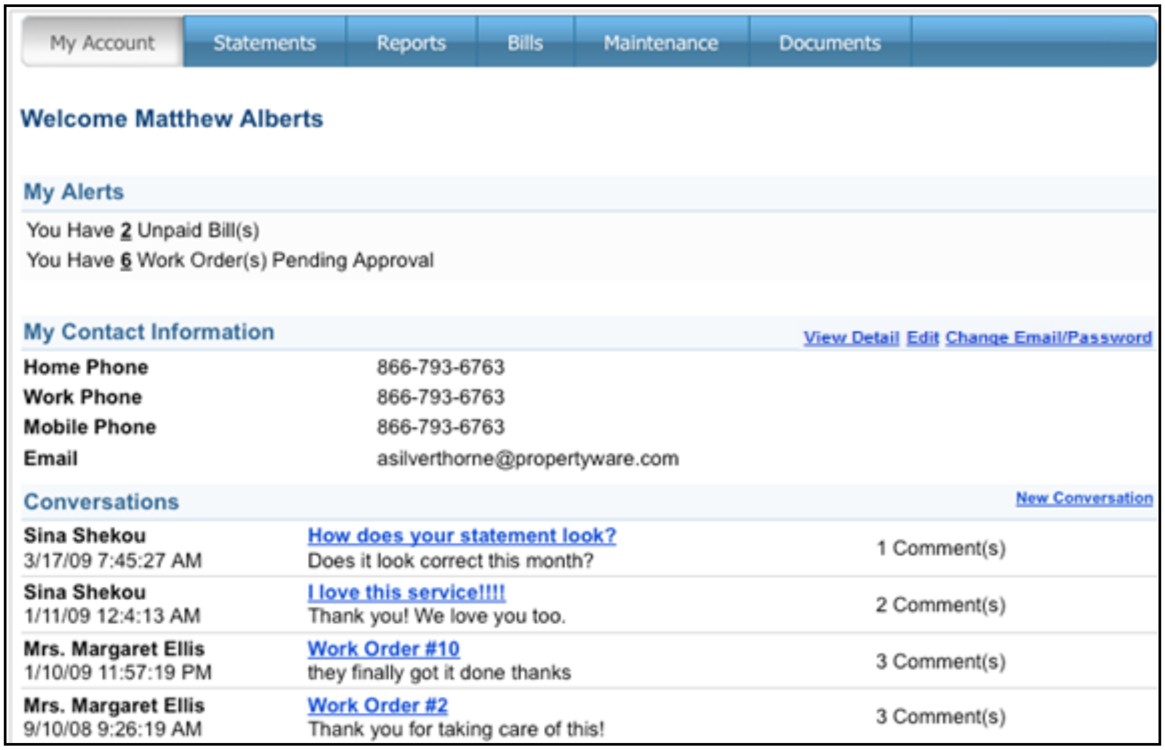


Fill out all the required fields and click the **Submit** button. The information you submit must match to the information on your property management company file.



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.

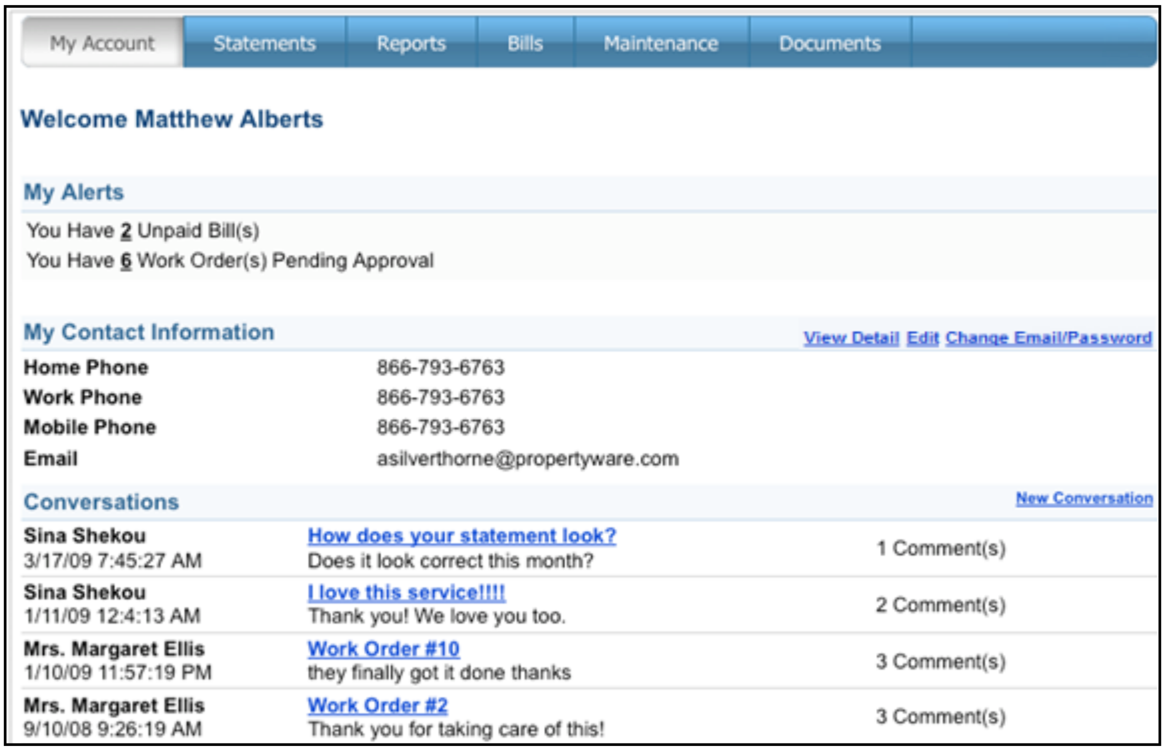


Owner Portal Navigation Tabs

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

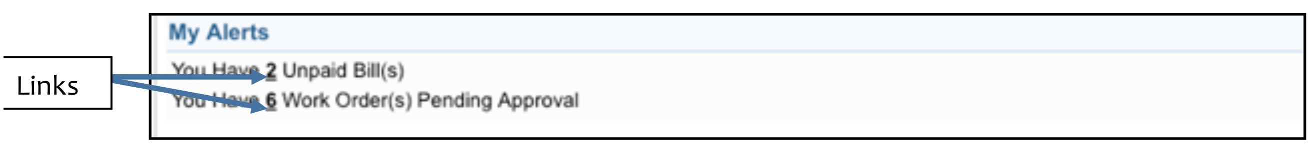
My Account

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**.



Viewing Alerts for Unpaid Bills and Work Orders

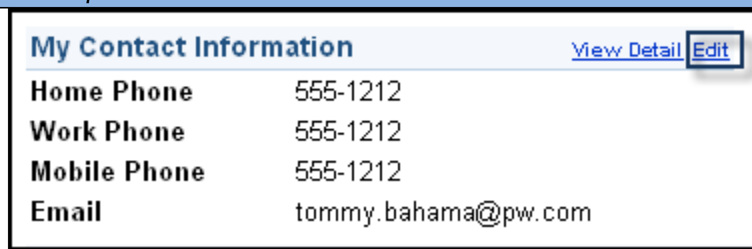
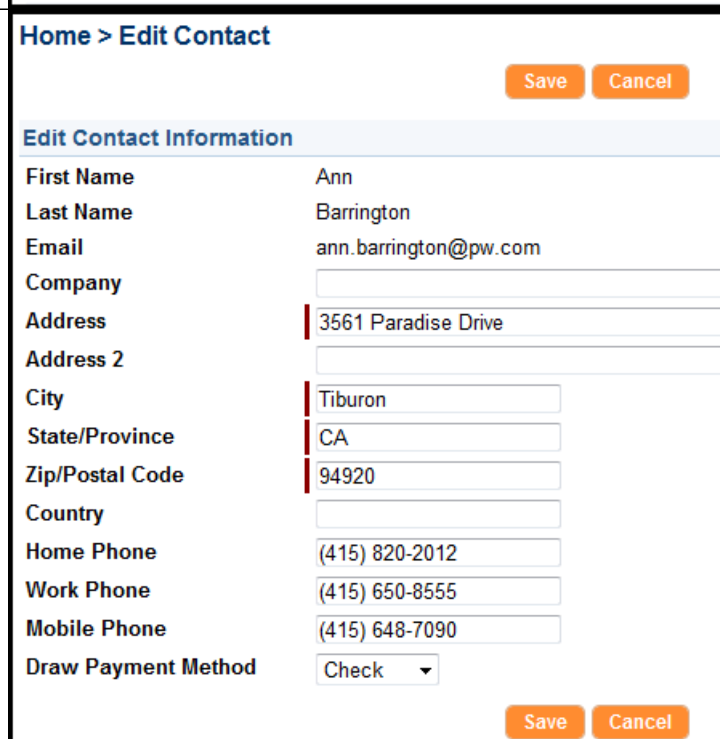
The **My Alerts** section shows links to unpaid bills and work orders waiting your approval. Click a number link to go directly to the **Bills** or **Maintenance** screen.



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

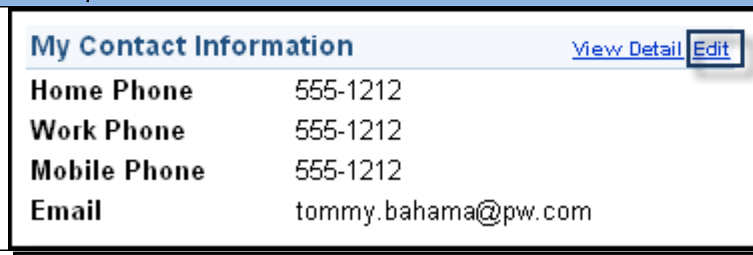
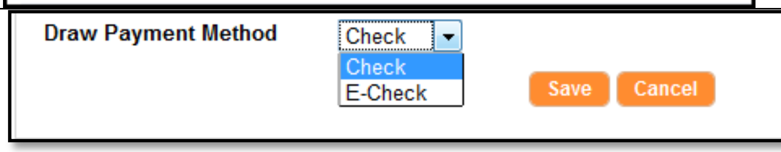
Updating Contact Information

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

<table>
<tr><th>Step</th><th>Action/Screen</th></tr>
<tr><td>From the My Account screen, click the Edit link.</td><td>
</td></tr>
<tr><td>Update the relevant fields. Choose the Draw Payment Method: Check or E-Check to setup the payment account.</td><td>
</td></tr>
<tr><td>Click the Save button.</td><td>
</td></tr>
</table>

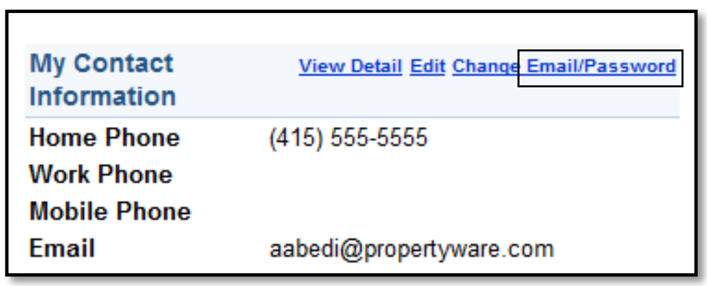
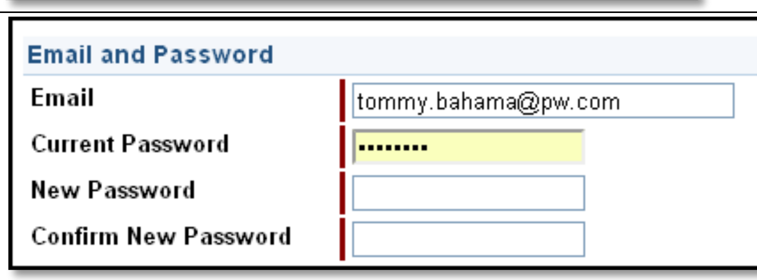
Editing Payment Account Information

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

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

Changing Email and Password

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

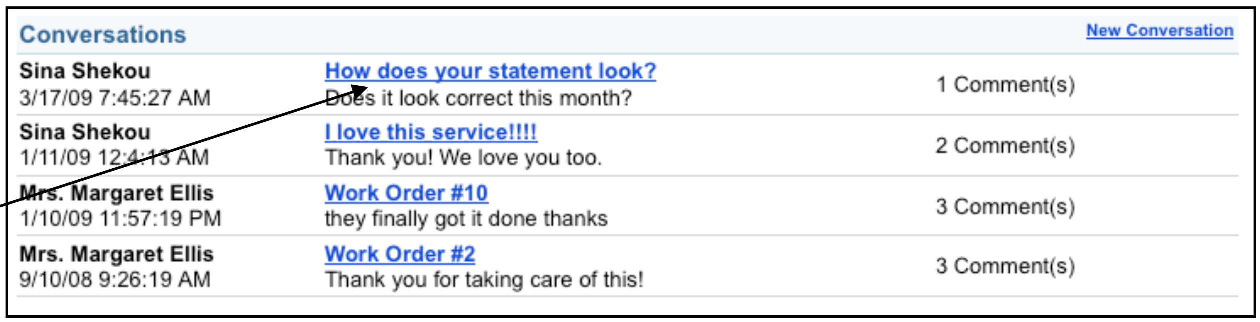
Step	Action/Screen
From the **My Contact Information** section, click the **Change Email/Password** link.	
Update the email address and password. Enter your existing password in the **Current Password** field. To create a new password, enter it in both the **New Password** and **Confirm New Password**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

Click the **Save** button.	

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



Subject Link

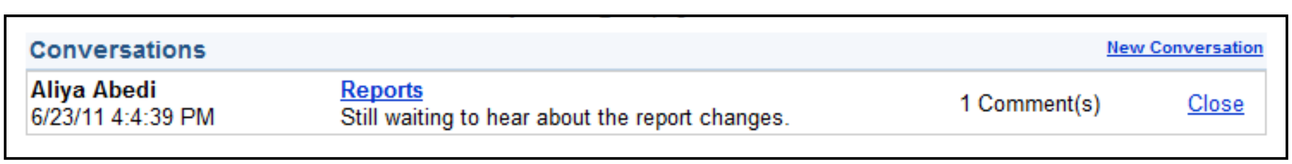
The **Conversations** section contains only active conversations. The column on the left displays the last person who has commented along with date and time the comment is posted. Click the subject link to view the list of comments.

Note

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

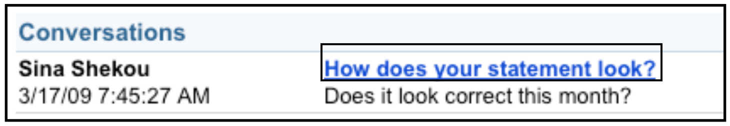
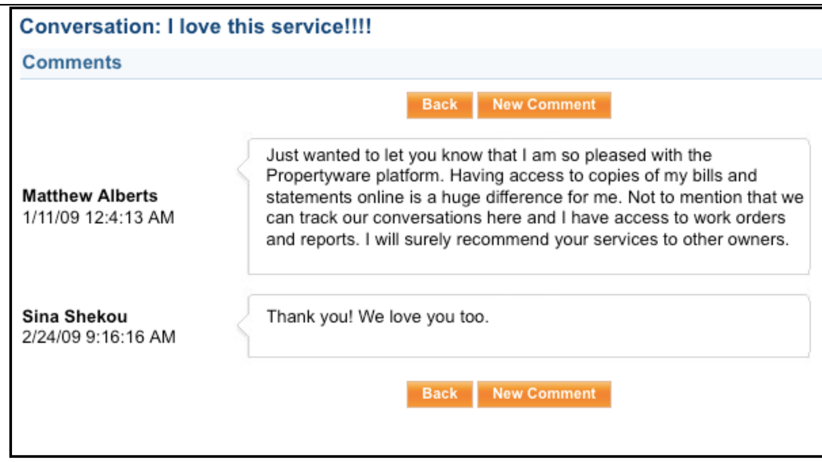
To delete a conversation from your account:

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



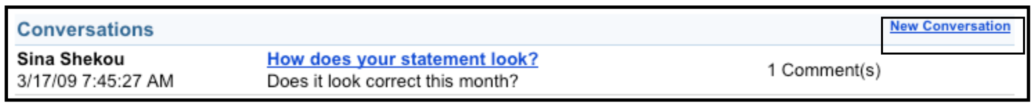
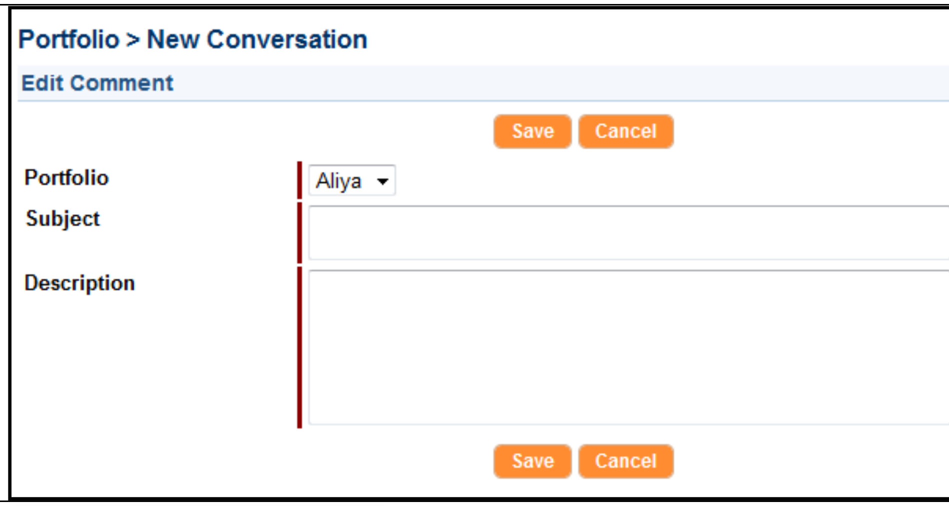
Adding New Comments to Conversations

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

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

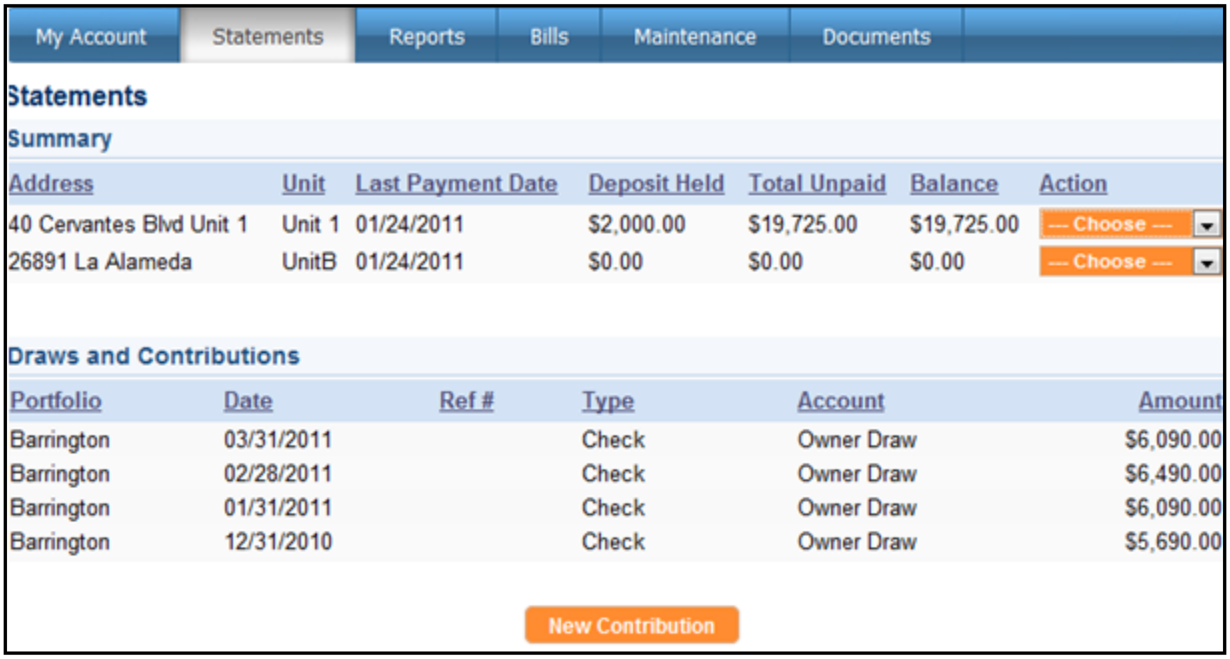
Creating New Conversations

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

Step	Action/Screen
Click the **New Conversation** link.	
Click the **New Comment** button to add a comment to the conversation.	
Click the **Save** 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.



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	-- Choose -- -- Choose -- View

This step opens the Statement as a PDF document.

Ann Barrington
3561 Paradise Drive
Tiburon CA 94920

OWNER STATEMENT

Period Start Date	06/01/2011
Period End Date	06/30/2011

Portfolio Summary

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	Balance
Beginning Balance as of 06/01/2011			$10,550.00
Income			
Rent	$0.00	$30,900.00	
Utilities	$0.00	$600.00	
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

Reports

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

Reports

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:

Unit Inventory

A list of all active units under management.

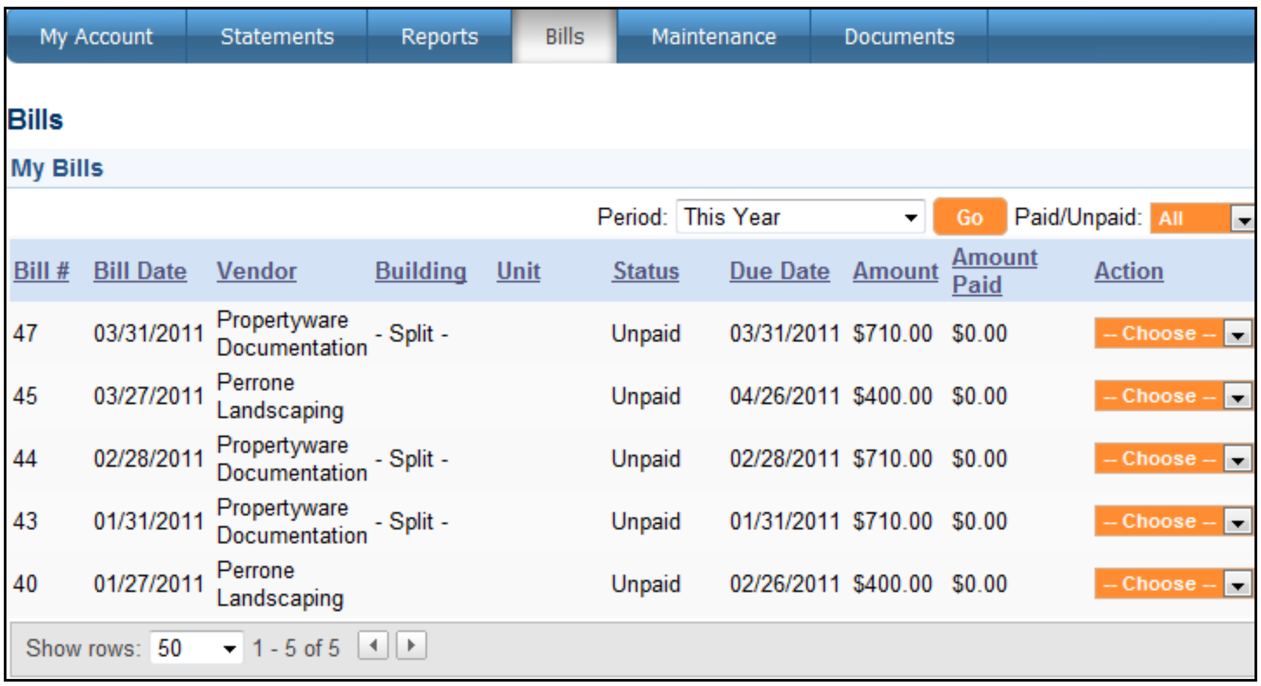
Avg. Monthly Rent	Max. Monthly Rent	Min. Monthly Rent	Total Days Vacant	Total Monthly Rent	Total Target Rent
$1,200.00	$1,200.00	$1,200.00	0.0	$1,200.00	$1,200.00

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.

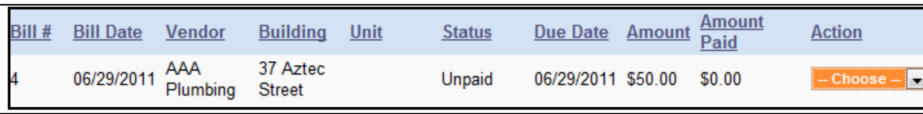


Bill #	Bill Date	Vendor	Building	Unit	Status	Due Date	Amount	Amount Paid	Action
47	03/31/2011	Propertyware Documentation	- Split -		Unpaid	03/31/2011	$710.00	$0.00	-- Choose --
45	03/27/2011	Perrone Landscaping			Unpaid	04/26/2011	$400.00	$0.00	-- Choose --
44	02/28/2011	Propertyware Documentation	- Split -		Unpaid	02/28/2011	$710.00	$0.00	-- Choose --
43	01/31/2011	Propertyware Documentation	- Split -		Unpaid	01/31/2011	$710.00	$0.00	-- Choose --
40	01/27/2011	Perrone Landscaping			Unpaid	02/26/2011	$400.00	$0.00	-- Choose --

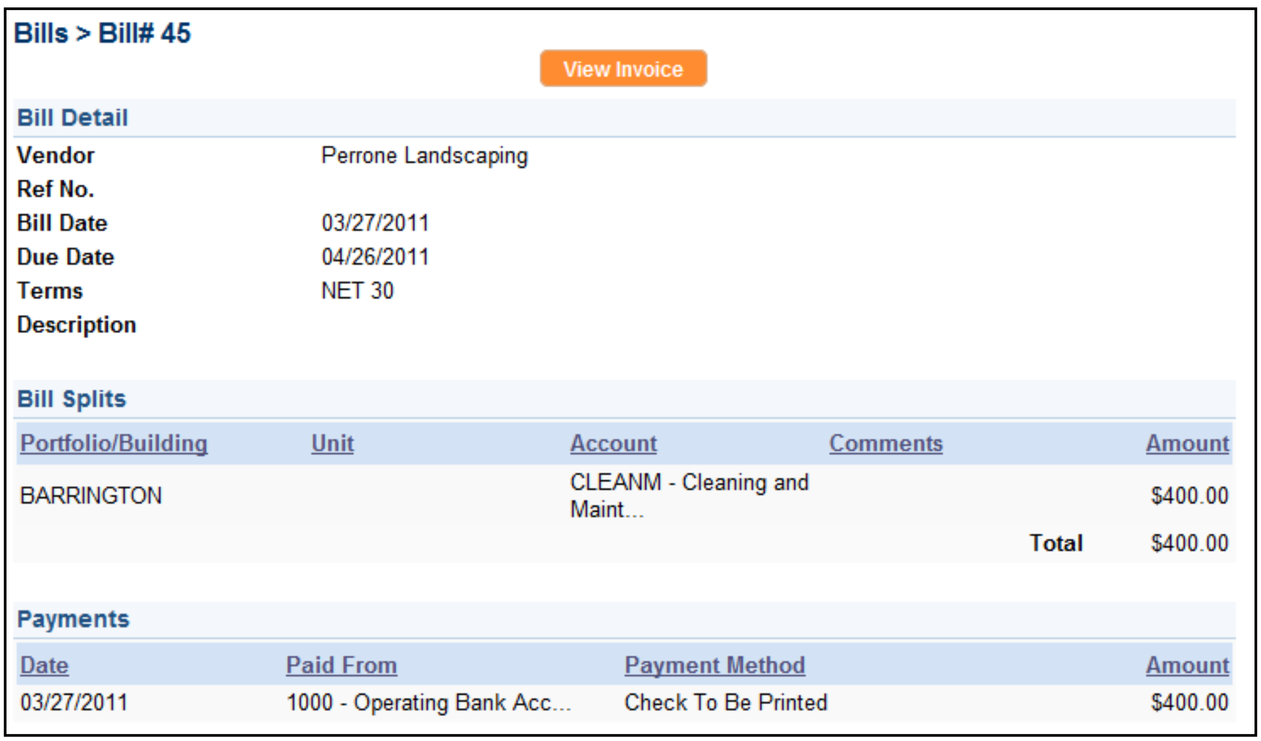
Show rows: 50 1 - 5 of 5

Viewing Your Bills

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

Step	Action/Screen
Use the filters: • **Period** to search for your bills by date • **Paid/Unpaid** to choose paid or unpaid, or both	
Select the **View Detail** option from the **Action** dropdown menu.	

This step displays the bill as shown below:



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
	TOTAL	$400.00

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.

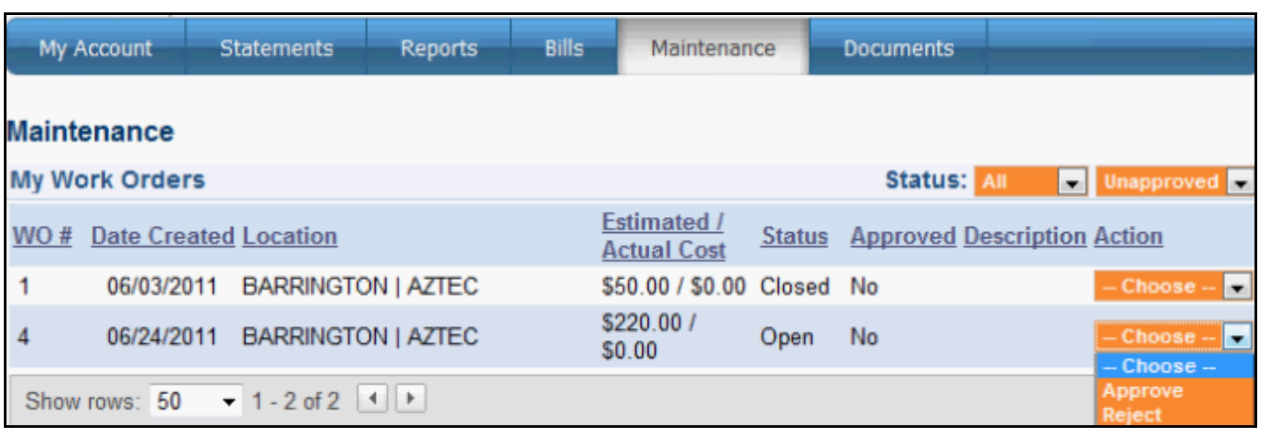
Viewing Work Orders

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.

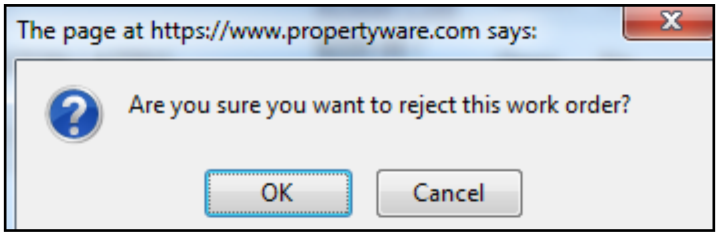
To view the detail of any work order, select the **View** option from the **Action** dropdown menu.

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.



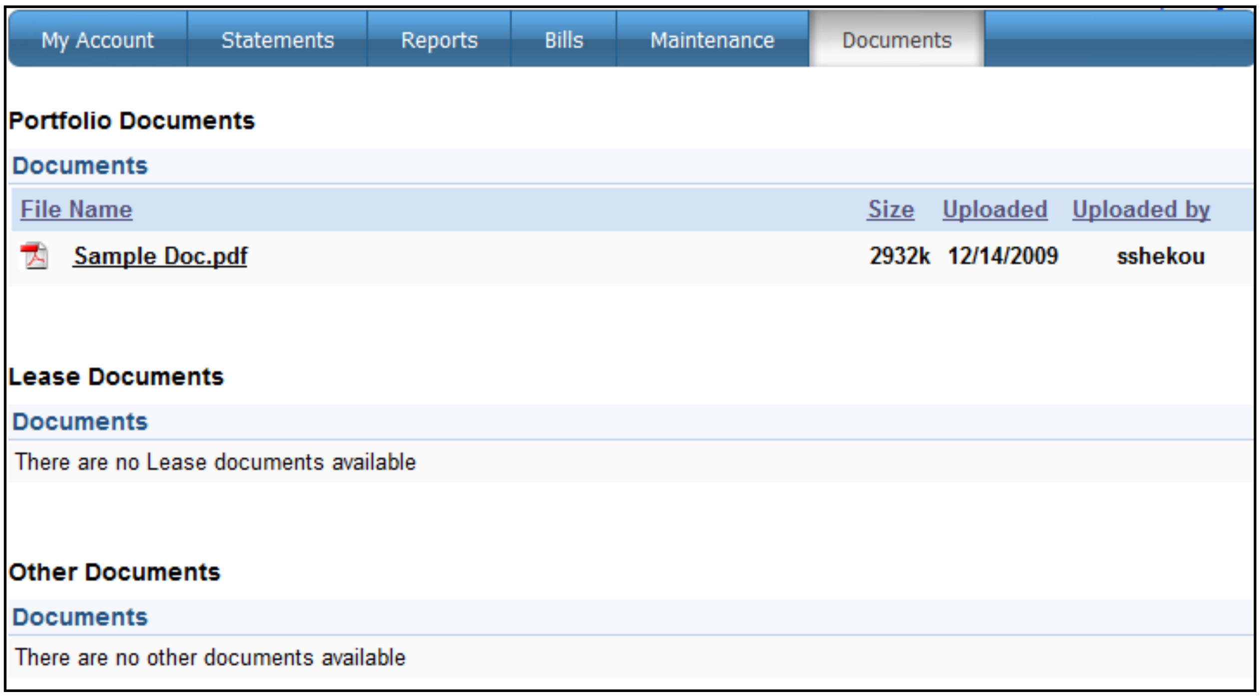
Click **OK** to confirm your action.



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

Documents

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.



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