

Owner Portal Guide

Copyrights

© 2002- 2011 Propertyware, Inc. All rights reserved. No part of this publication may be reproduced, transmitted or stored in any archives without the expressed written permission of Propertyware, Inc.

PURPOSE

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

Table of Contents

Owner Portal	4
Logging to Your Portal	4
Signing up for Owner Account	4
Owner Portal Navigation Tabs	6
My Account	7
Viewing Alerts for Work Orders	7
Updating Contact Information	8
Editing Payment Account Information	9
Changing Email and Password	9
Viewing and Deleting Conversations	10
Adding New Comments to Conversations	11
Creating New Conversations	12
Statements	13
Reports	16
Bills	Error! Bookmark not defined.
Maintenance	18
Documents	20

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 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

Propertyware Owner Portal Guide

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

Sign up

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.

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 Account Statements Reports Bills Maintenance Documents		
Welcome Matthew Alberts		
My Alerts		
You Have 2 Unpaid Bill(s)		
You Have 6 Work Order(s) Pending Approval		
My Contact Information View Detail Edit Change Email/Password		
Home Phone	866-793-6763	
Work Phone	866-793-6763	
Mobile Phone	866-793-6763	
Email	asilverthorne@propertyware.com	
Conversations New Conversation		
Sina Shekou 3/17/09 7:45:27 AM	How does your statement look? Does it look correct this month?	1 Comment(s)
Sina Shekou 1/11/09 12:4:13 AM	I love this service!!!! Thank you! We love you too.	2 Comment(s)
Mrs. Margaret Ellis 1/10/09 11:57:19 PM	Work Order #10 they finally got it done thanks	3 Comment(s)
Mrs. Margaret Ellis 9/10/08 9:26:19 AM	Work Order #2 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 Statements Reports Bills Maintenance Documents

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' interface with the following components:

- Navigation Tabs:** My Account (selected), Statements, Reports, Bills, Maintenance, Documents.
- Welcome Message:** Welcome Matthew Alberts
- My Alerts Section:**
 - You Have **2** Unpaid Bill(s)
 - You Have **6** Work Order(s) Pending Approval
- My Contact Information Section:**
 - Home Phone: 866-793-6763
 - Work Phone: 866-793-6763
 - Mobile Phone: 866-793-6763
 - Email: asilverthorne@propertyware.com
 - Links: [View Detail](#), [Edit](#), [Change Email/Password](#)
- Conversations Section:**
 - [New Conversation](#)
 - Sina Shekou** (3/17/09 7:45:27 AM): [How does your statement look?](#) (1 Comment(s))
 - Sina Shekou** (1/11/09 12:4:13 AM): [I love this service!!!!](#) (2 Comment(s))
 - Mrs. Margaret Ellis** (1/10/09 11:57:19 PM): [Work Order #10](#) (3 Comment(s))
 - Mrs. Margaret Ellis** (9/10/08 9:26:19 AM): [Work Order #2](#) (3 Comment(s))

Viewing Alerts for Unpaid Bills and Work Orders


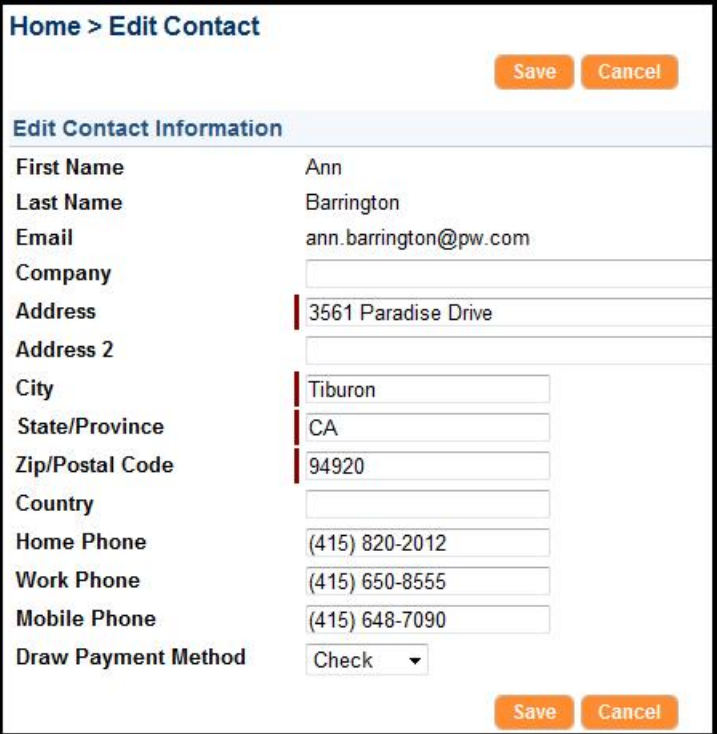

The **My Alerts** section shows links for work order. Click a number link to go directly to the **Bills** or **Maintenance** screen.

This close-up highlights the 'My Alerts' section. A callout box labeled 'Links' has arrows pointing to the numbers '2' and '6' in the text 'You Have 2 Unpaid Bill(s)' and 'You Have 6 Work Order(s) Pending Approval', indicating that clicking these numbers provides direct links to the respective sections.

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


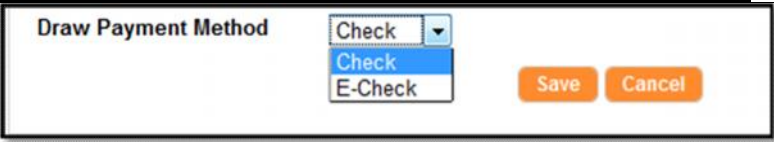

Updating Contact Information

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

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

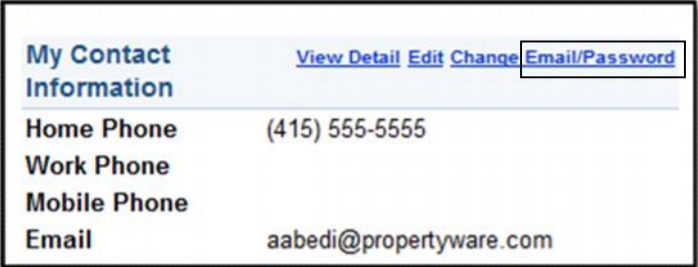
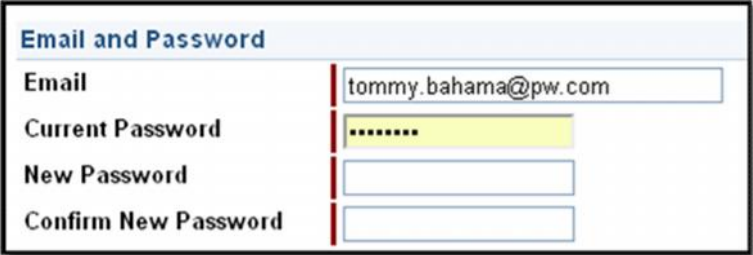
Editing Payment Account Information

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

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



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.


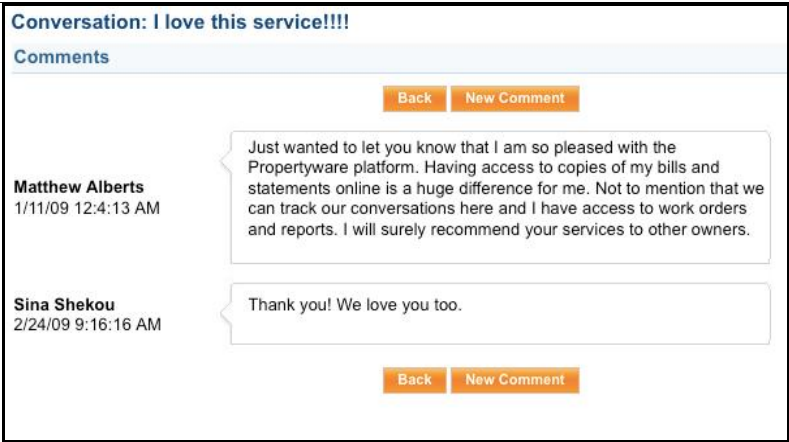

To delete a conversation from your account:

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

Conversations			New Conversation
Aliya Abedi 6/23/11 4:4:39 PM	Reports Still waiting to hear about the report changes.	1 Comment(s)	Close

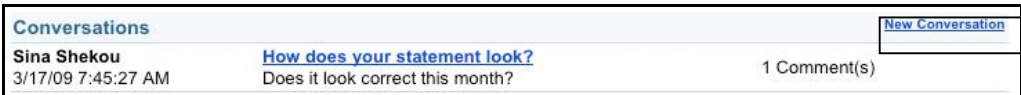
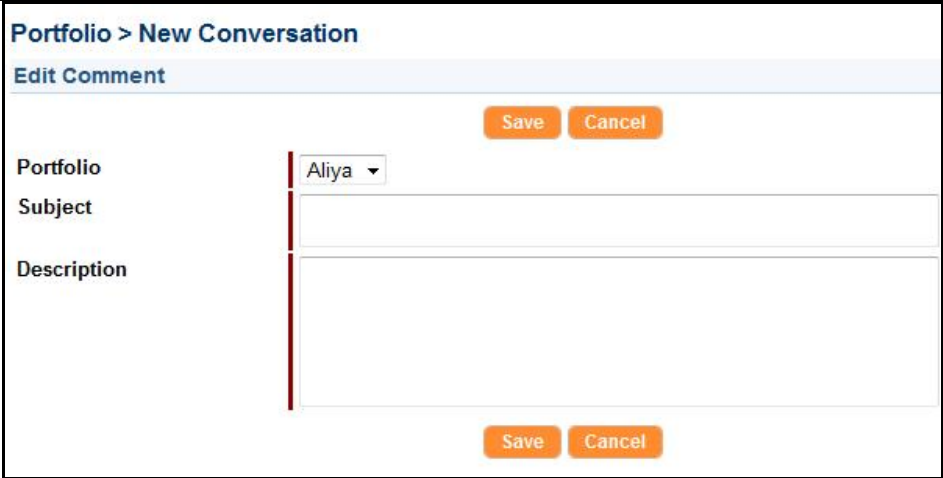

Adding New Comments to Conversations

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.

My Account	Statements	Reports	Bills	Maintenance	Documents	
Statements						
Summary						
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 ---
Draws and Contributions						
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	
New Contribution						

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	<div> -- Choose -- -- Choose -- View </div>

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.	<div> <div>Choose</div> <div></div> </div>
Barrington	Accts. Payable- Unpaid Bills	A list of all unpaid bills	<div> <div>Choose</div> <div>View</div> </div>

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

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.

My Account

Statements

Reports

Bills

Maintenance

Documents

Maintenance

My Work Orders

Status:

Open

Approved

WO #	Date Created	Location	Estimated / Actual Cost	Status	Approved	
2	05/20/2010	BARRINGTON 27TH	\$0.00 / \$0.00	Open	Yes	<div> <div>Leaky faucet</div> <div> <div>All</div> <div>Open</div> <div>Closed</div> </div> <div> <div>Choose</div> </div> </div>
1	06/03/2011	BARRINGTON AZTEC	\$50.00 / \$0.00	Closed	No	<div> <div>Choose</div> </div>

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.

My Account

Statements

Reports

Bills

Maintenance

Documents

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 -

Show rows:

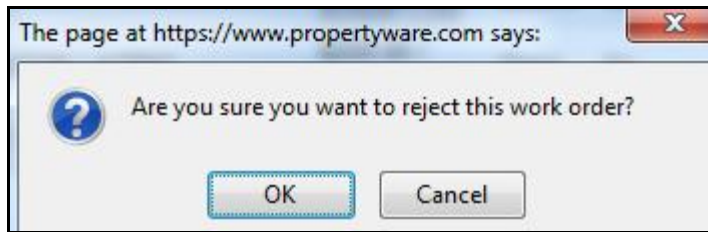
50

1 - 2 of 2

Approve

Reject

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.

My Account	Statements	Reports	Bills	Maintenance	Documents
------------	------------	---------	-------	-------------	-----------

Portfolio Documents

Documents

File Name	Size	Uploaded	Uploaded by
 Sample Doc.pdf	2932k	12/14/2009	sshekou

Lease Documents

Documents

There are no Lease documents available

Other Documents

Documents

There are no other documents available

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