Propertyware

New View Owner Portal

User Guide

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Contents

CHAPTER 1

Getting Started with the Owner Portal in the New View

This user guide applies to the Owner Portal in the New View. For information regarding the Classic View, please see the Owner Portal help articles.

The Owner Portal is a special area of your property manager's website that is designed to provide you with 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.

In This Chapter

Signing In to the Owner Portal

To access the Owner Portal, you must provide an email address to associate with your Owner Portal account. Your property manager uses this email address to set up your account and sends an email with sign-in instructions for your Owner Portal.

Signing In to the Owner Portal

To sign in to your Owner Portal:

1. After you request access to the Owner Portal, your property manager sends you a welcome email that includes:
    - Web address of the Owner Portal **Login** page.
    - Your login information, including a link to the **Create a New Password** page.
    - Instructions for signing in to the Owner Portal.
2. In the welcome email, click the link that follows the text "**Password:**".

    The **Create a New Password Page** opens.
3. In the **Password** and **Confirm Password** text boxes, type a new password. The password you choose must contain at least three of these character types:
    - Uppercase letter
    - Lowercase letter
    - Number
    - Special character from: ! @ # $ % ^ & * ( ) - _ [ ] { }
4. Click **Submit**.

    If the passwords you typed in the **Password** and **Confirm Password** text boxes match, your new password is created and the **Owner Terms and Conditions** page opens.
5. Review the **Owner Terms and Conditions**; then, select the **I Agree to the Terms and Conditions** checkbox.
6. Click **Submit**.

    Your agreement to the **Terms and Conditions** is recorded and you will not be required to repeat the agreement process again.
7. The next time you log in to your Owner Portal, use your new password and follow the steps in **Signing In to a Specific Owner Portal**.

Signing In to a Specific Owner Portal

If you use the same email address with multiple management companies, and more than one of those management companies provides access to the Owner Portal, you must indicate which Owner Portal to sign in to.

To sign in to a specific Owner Portal:

1. Open the Owner Portal **Login** page.
2. Type your email address and password in the appropriate fields.
3. Click **Sign In**.
4. From the drop-down list that appears, select the appropriate management company.
5. Click **Sign In** a second time to sign on to the Owner Portal for that management company.

   If you are currently signed in to an Owner Portal and you want to switch to a different Portal, you must first log out of the current Portal by selecting **Logout** from the **User Menu**. After you have logged out, follow the steps for signing in to a specific Owner Portal.

Resetting Your Owner Portal Password

If you lose or forget your Owner Portal password, you can reset it from the **Login** page.

If you need to change your password for security purposes, use the **Change Password (on page 51)** option in the **User Menu**.

To reset your password:

1. On the **Login** page, click **Forgot Your Password?** (or a similarly named button or link).
2. Provide your **First Name**, **Last Name**, and the **Email** you provided when you requested access to the Owner Portal.
3. Click **Submit**.

   You will receive an email with a link to allow you to change your password and log in.
4. Click the link that follows the text "**Password:**".

   The **Create a New Password** page opens.
5. In the **Password** and **Confirm Password** text boxes, type a new password. The password you choose must contain at least three of these character types:
   - Uppercase letter
   - Lowercase letter

- Number
- Special character from: ! @ # $ % ^ & * ( ) - _ [ ] { }

6. Click **Submit**.

   If the passwords you typed in the **Password** and **Confirm Password** text boxes match and meet the security requirements, your password is changed and a confirmation message appears with a link to the **Login** page below it.

Navigating the Owner Portal in the New View

The Owner Portal can be configured to allow you to navigate the portal in one of two views: the Classic View or the New View.

The New View of the Owner Portal is documented in this user guide. For information regarding the Classic View, click the **Help** link in the Classic View.

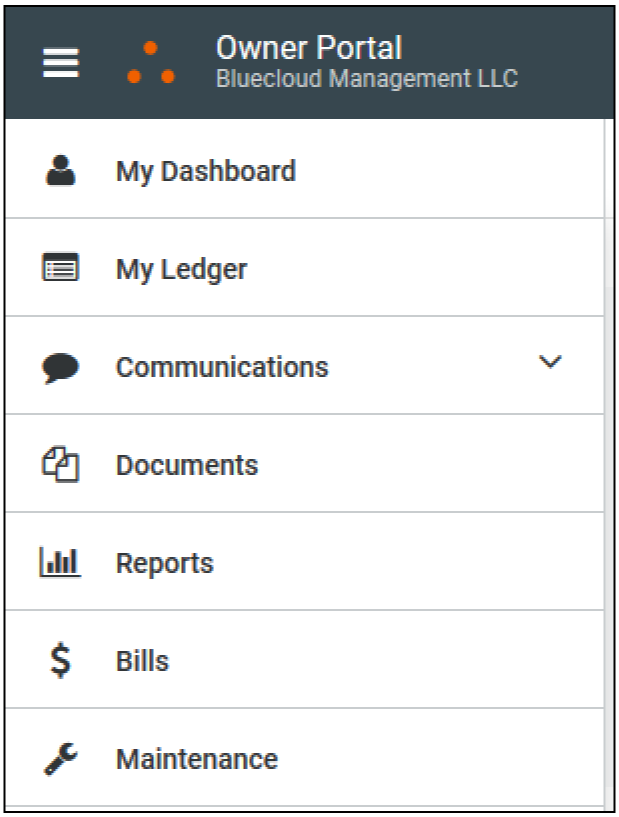
In the New View, you navigate the Owner Portal using the **Navigation Menu** that appears on the left side of every page.

From the **Navigation Menu**, you can click one of these elements to open the related page:

- **My Dashboard** (on page 11) (present if enabled by your property manager): Displays income and expense data from the properties in your portfolio. The income and expense data appears in tiles and, below the tiles, in graph form. **My Dashboard** can be configured to show real-time data or to show data from the most recently published statement.
- **My Ledger** (on page 15) (present if enabled by your property manager): Displays income and expense data from the properties in your portfolio. Also includes ledger information for the portfolios that match the filter configuration.
- **Communications** (on page 19): Expands to reveal these items:
  - **Community Message** (on page 20): Presents the current community message provided by your property manager (read-only).
  - **Alerts** (on page 20): Shows links to unpaid bills and work orders that are waiting for your approval. You can also reach the **Alerts** page by clicking the **Alerts** icon .
  - **Conversations** (on page 21): Displays conversations between you and your property management team.
- **Documents** (on page 23): Allows you 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.
- **Reports** (on page 35): Presents all reports related to the management of your rental properties. All published reports use real-time data.

- **Bills** (on page 37): Displays all bills and payments that have been recorded for your rental properties. These bills include a breakdown of the expense line items, descriptions, and invoices from vendors (if the property manager scans and attaches invoices to bills).
- **Maintenance** (on page 43): Shows all service requests submitted by the tenants occupying your rentals and work orders created by the management team. Also allows you to approve or reject work orders.

Each page has a short video designed to familiarize you with the New View. To watch the video for a page, navigate to the page, then click the **Video** icon .



CHAPTER 2

My Dashboard

My Dashboard displays income and expense data from your properties. The income and expense data appears in tiles and, below the tiles, in graph form.

To watch a short video that describes this page, click the **Video** *icon in the upper right corner of the page.*

Your property manager can configure the **My Dashboard** page to show real-time data or to show data from the most recently published statement.

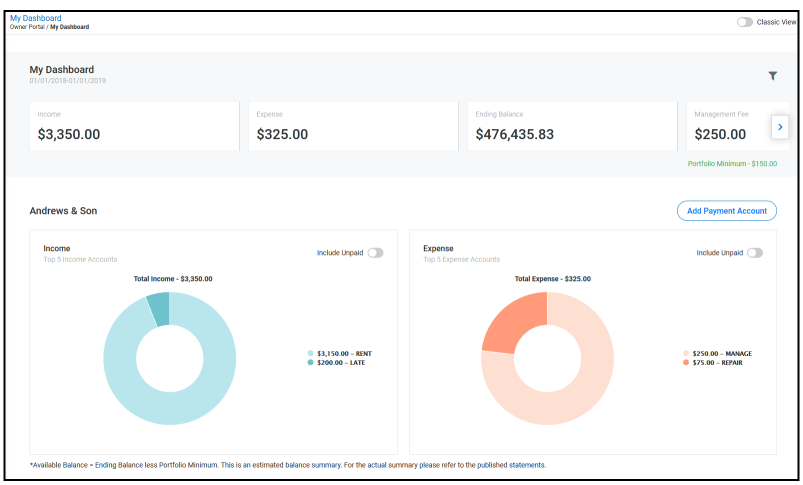
The **My Dashboard** page includes this information for the selected portfolio and time frame:

- In the *My Dashboard* section: **Income**, **Expense**, **Ending Balance**, **Management Fee**, and **Portfolio Minimum**
- In the *Portfolio* section: Income from the top five income accounts for the portfolio, represented in one graph, and expense from the top five expense accounts for the portfolio, represented another graph.

To change the portfolio and date range presented on **My Dashboard, click** the **Filter** icon . See **Filtering the Portfolio and Time Frame on My Dashboard (on page 12)** for more information.

To add a payment account from **My Dashboard**, click **Add Payment Account**. See **Adding a Payment Account** (on page 13) for more information.

Add Payment Account *is only available if your property management company configures the Owner Portal to allow you to add or delete bank information.*



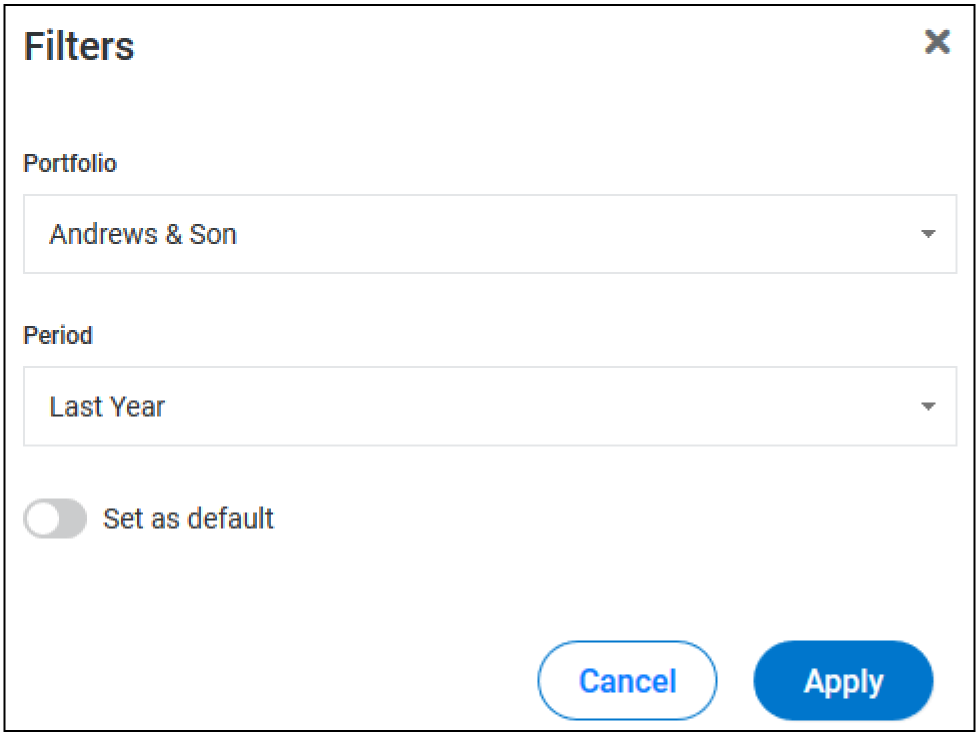
In This Chapter

Filtering the Portfolio and Date Range on My Dashboard

To change the portfolio and date range for the data presented on **My Dashboard**:

1. Click the **Filter** icon .

   The **Filters** panel appears.



2. In the **Portfolio** drop-down list, select the portfolio to feature on **My Dashboard**.
3. In the **Period** drop-down list:
   - Select a preset date range (“Last Year”, “This Month”, etc.).

   - or -

   - Select “Custom Date Range” then type or select a **Start Date** and **End Date** for your custom date range.
4. To make the portfolio and date range the default data set for **My Dashboard**, click the **Set as Default** toggle switch. The switch turns green when **Set as Default** is enabled.
5. Click **Apply**.

   The information presented on **My Dashboard** changes to reflect the portfolio and date range you selected.

Adding a Payment Account

Add Payment Account is only available if your property management company configures the Owner Portal to allow you to add or delete bank information.

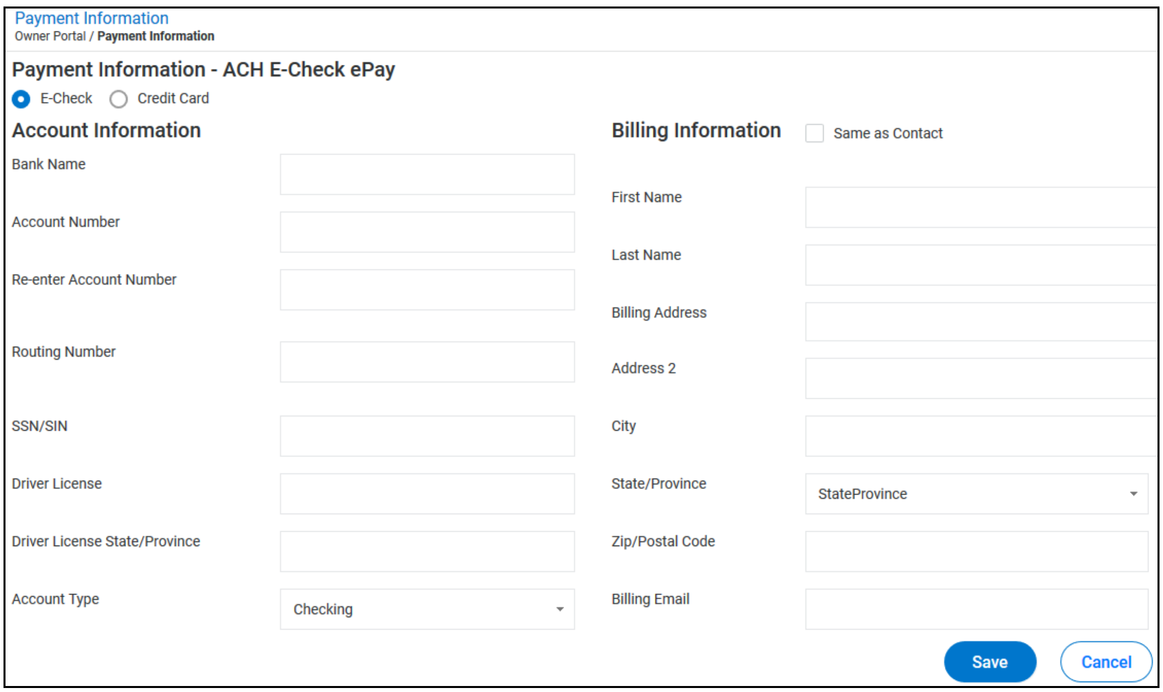
To add a payment account from **My Dashboard**:

1. On **My Dashboard**, click **Add Payment Account**.

   The **Payment Information** page opens.

   You can also add a payment account from the User Menu (*on page 50*).

2. To add an **E-Check** account, select **E-Check**.
3. To add a **Credit Card** account, select **Credit Card**.
4. Provide the required information, then click **Save**.



CHAPTER 3
My Ledger

The **My Ledger** page is a historical ledger that displays transactions against a particular portfolio.

To watch a short video that describes this page, click the **Video** *icon in the upper right corner of the page.*

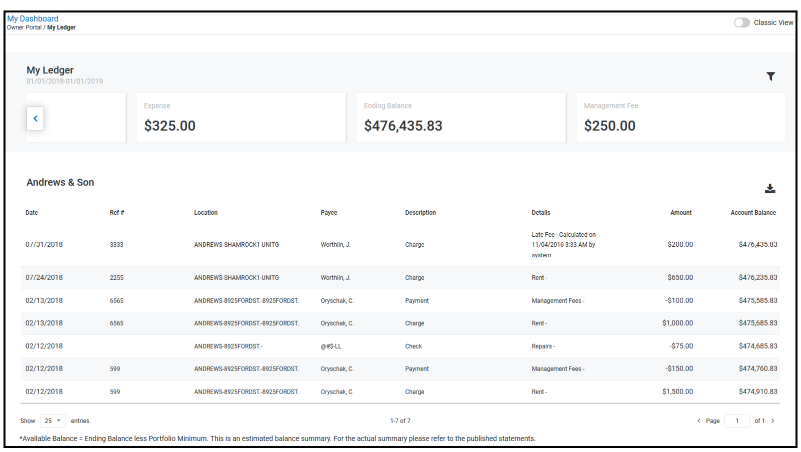
My Ledger includes this information for the selected portfolio and date range:

- In the *My Ledger* section:
  - **Income**
  - **Expense**
  - **Ending Balance**
  - **Management Fee**
- For each transaction that appears in the list on the *Portfolio* section, this information is included: **Date**, **Ref#**, **Location**, **Payee**, **Description**, **Details**, **Amount**, and **Account Balance.**

To change the portfolio and date range presented on **My Ledger**, click the **Filter** icon . See Filtering the Portfolio and Date Range on My Ledger (on page 16) for more information.

To download a copy of the list of transactions that appears in the *Portfolio* section, click the **Download** icon . See Downloading a Copy of My Ledger (on page 17) for more information.

To navigate through the transactions list and set the maximum number of transactions per page, use the navigation tools below the list. See Navigating and Managing the List of Transactions (on page 17) for more information.



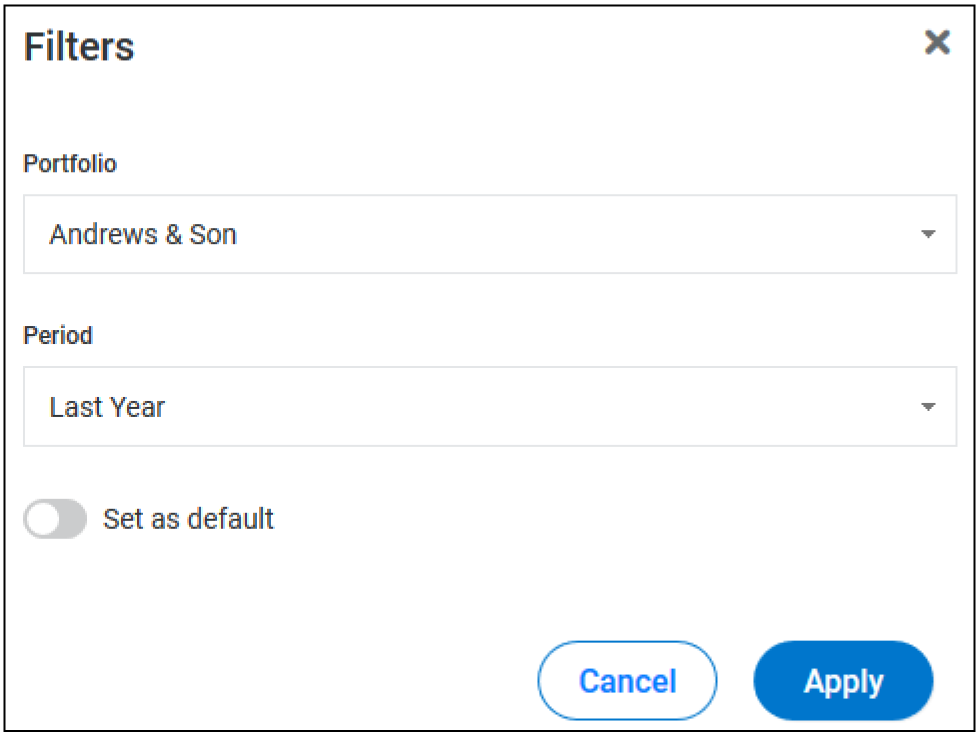
In This Chapter

Filtering Portfolio and Date Range on My Ledger

To change the portfolio and date range for the data presented on **My Ledger**:

1. Click the **Filter** icon .

   The **Filters** panel appears.

2. In the **Portfolio** drop-down list, select the portfolio to feature on **My Ledger**.
3. In the **Period** drop-down list:
   - Select a preset date range ("Last Year", "This Month", etc.).

   \- or -

   - Select "Custom Date Range" then type or select a **Start Date** and **End Date** for your custom date range.
4. To make the portfolio and date range the default data set for **My Ledger**, click the **Set as Default** toggle switch. The switch turns green when **Set as Default** is enabled.
5. Click **Apply**.

   The information presented on **My Ledger** changes to reflect the portfolio and date range you selected.

Downloading a Copy of My Ledger

To download a copy of the data in the *Portfolio* section of **My Ledger**:

1. Use the **Portfolio** and **Period** filters (on page 16) and page navigation tools to locate the data you would like to download.
2. Click the **Download** icon .
3. Your browser opens a download dialog.
4. Configure the settings in the download dialog and click the appropriate button to complete the download.

Navigating and Managing the List of Transactions

To navigate through the list of transactions in the *Portfolio* section of **My Ledger** and manage the number of transactions shown on a single page:

1. To set the number of items that appear on a single page of the transaction list, click the **Show XXX Entries** drop-down list, then select the number of transactions to appear on a page.
2. To view a specific page in the list, click the **Page XX of XX box**, then type the desired page number.
3. To go to the next or previous page, click the **Next** icon or the **Previous** icon .

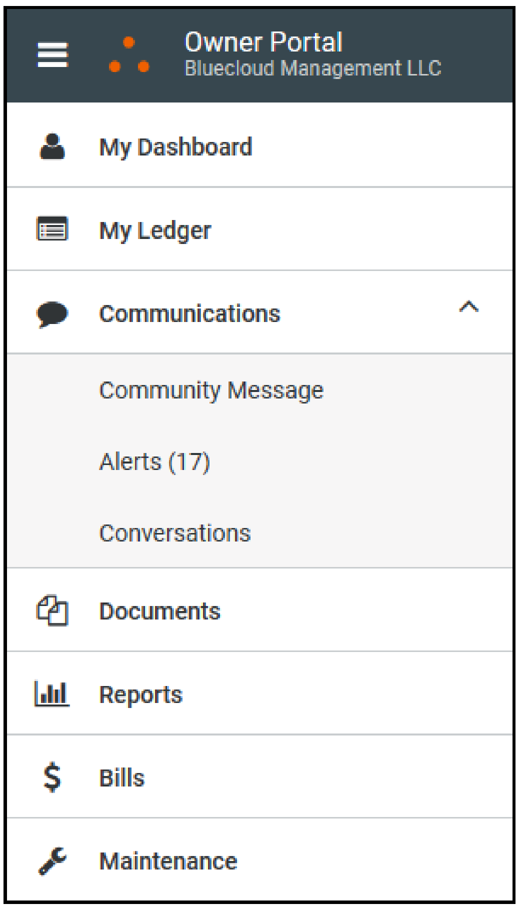
CHAPTER 4

Communications

The **Communications** tab provides access to:

- **Community Message** (on page 20): Presents the current community message provided by your property manager (read-only).
- **Alerts** (on page 20): Shows links to unpaid bills and work orders that are waiting for your approval. You can also reach the **Alerts** page by clicking the **Alerts** icon .
- **Conversations** (on page 21): Displays conversations between your property managers and your tenants. Also allows you to view and initiate conversations with your property managers.

To watch a short video that describes this page, click the **Video** *icon in the upper right corner of the page.*



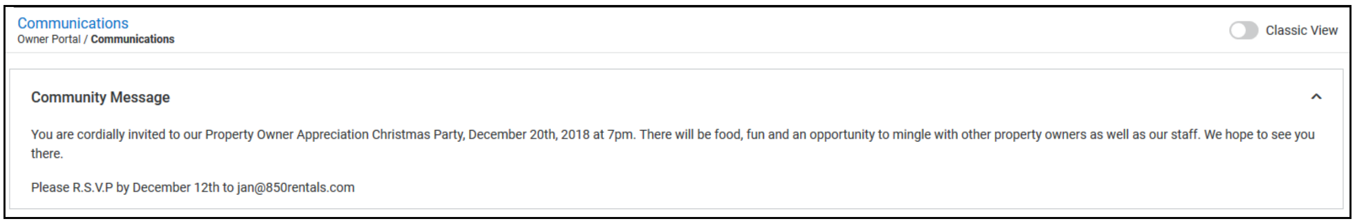
In This Chapter

Viewing the Community Message

The **Community Message** page displays your property manager's community message.

You can only view the community message. Your property manager creates and manages community messages.

Click the **Expand** icon to display the community message. Click the **Collapse** icon to hide the community message.



Viewing Your Alerts

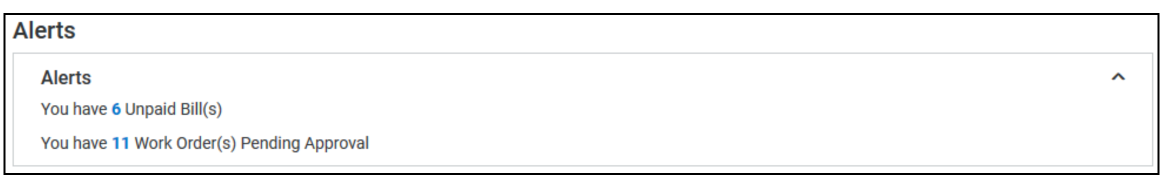
The **Alerts** page shows the number of alerts triggered by unpaid bills and work orders that need to be reviewed.

You can reach the **Alerts** page by clicking **Alerts** under the **Communications** tab or by clicking the **Alerts** icon near the **Help** icon.

To open the **Bills (on page 37)** page, click the number in the **Unpaid Bills** alert.

To open the **Maintenance (on page 43)** page, click the number in the **Work Orders Pending Approval** alert.

Click the **Expand** icon to display the alerts. Click the **Collapse** icon to hide the alerts.



Creating and Managing Conversations

The **Conversations** page lists conversations between you and your property management team.

Only active conversations appear on the **Conversations** page.

Conversations between property managers and tenants are read-only and you cannot add comments to them.

You can initiate and comment on conversations between you and your property managers.

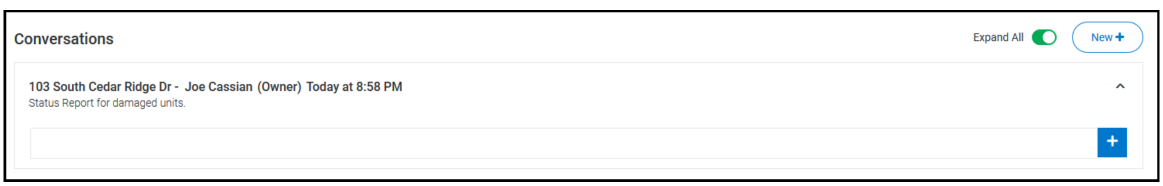
Each conversation includes:

- The property associated with the property manager who started the conversation or made a comment.
- The name of the person who initiated the conversation or made a comment.
- The date and time the conversation or comment was created.
- A **Comment** text box that allows you to add a comment to the conversation (for conversations between you and your property managers).\

Expanding and Collapsing Conversations

To expand or collapse a single conversation click the **Expand/Collapse** icon /.

To expand or collapse all conversations, click the **Expand All** toggle switch. The switch turns green when all conversations are expanded.

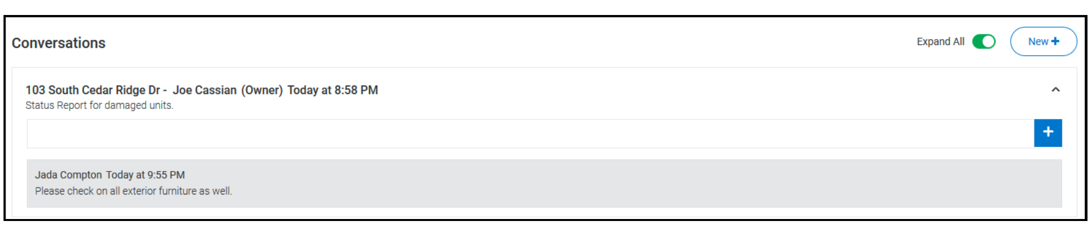


Commenting on a Conversation

To add a comment to a conversation:

1. In the **Comment** text box, type your message.
2. To post your comment, click the **Add Comment** icon .

   Your comment appears under the next most recent comment and is also sent to the property managers.

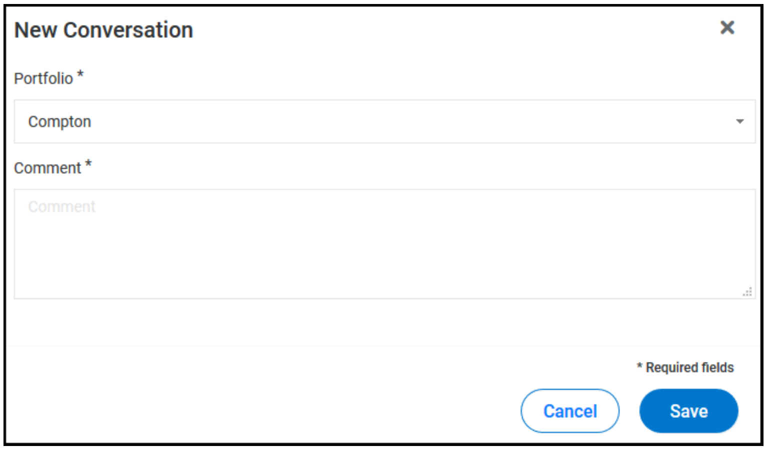


Starting a New Conversation

To start a new conversation:

1. Click **New+**.

   The **New Conversation** panel opens.



2. Select a portfolio from the **Portfolio** drop-down list.
3. Type your message in the **Comment** text box.
4. When your message is complete, click **Save** to send the message to the property managers associated with the portfolio.

   The conversation appears on the **Conversation** page, as will any responses from the property managers.

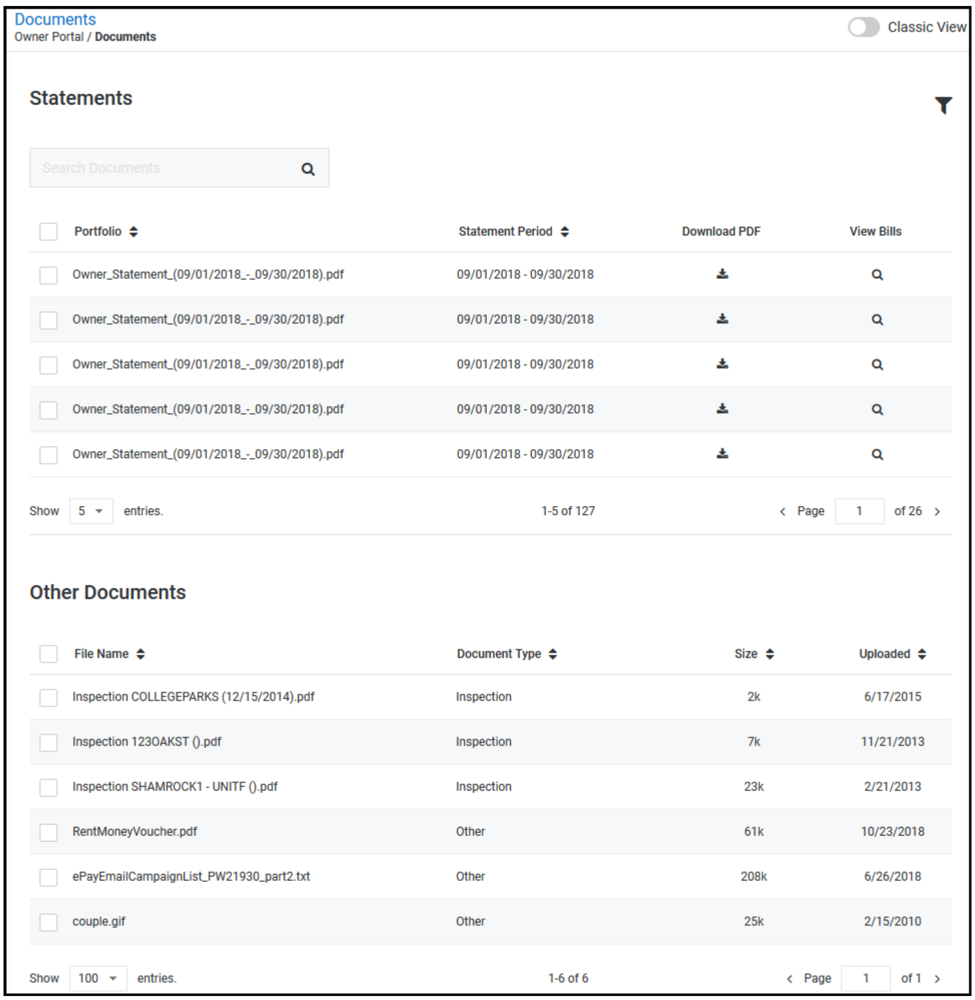
CHAPTER 5

Documents

The **Documents** page is made up of two lists of documents:

- *Statements* section (on page 24): Lists Owner Statements. You can view or download those Owner Statements.
- *Other Documents* section (on page 30): Lists documents, other than Owner Statements, and images your property management company shared. You can view or download the shared documents and images, but you must have the appropriate software to view the downloaded files.

To watch a short video that describes this page, click the Video icon in the upper right corner of the page.



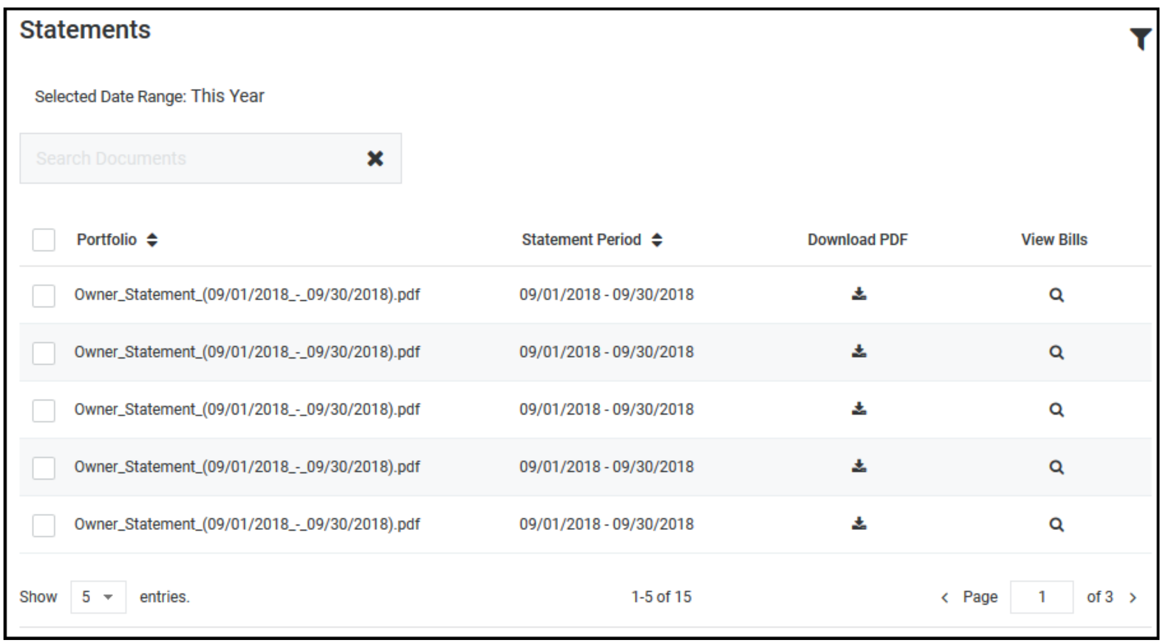
In This Chapter

Documents - Statements Section

The *Statements* section of the **Documents** page lists Owner Statements uploaded to the Owner Portal by your property management team.

In the *Statements* section, you can:

- Filter the list of Owner Statements (on page 25) by portfolio or date.
- Search for documents (on page 26) in the *Statements* and *Other Documents* sections.
- Sort the list of Owner Statements (on page 26) by clicking the **Portfolio** or **Statement Period** column header.
- View an Owner Statement (on page 27).
- Download a single Owner Statement (on page 27).
- Download some or all of the Owner Statements as a group (on page 27).
- View bills associated with an Owner Statement (on page 28).
- Navigate and manage the list of statements (on page 29).

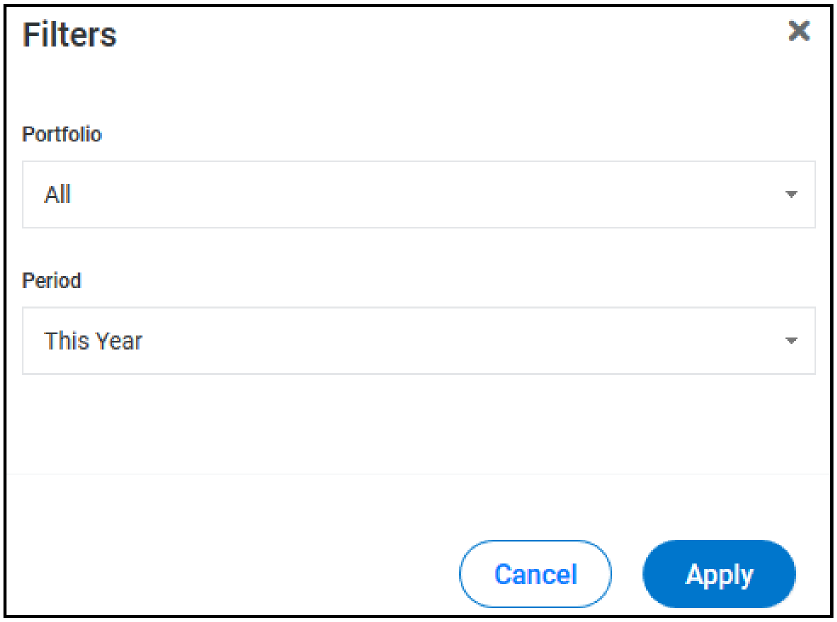


Filtering the List of Owner Statements

To filter the list of Owner Statements:

1. Click the **Filter** icon .

   The **Filters** panel appears.

2. In the **Portfolio** drop-down list, select a portfolio or "All".
3. In the **Period** drop-down list:
   - Select a preset date range ("Last Year", "This Month", etc.).

   \- or -

   - Select "Custom Date Range" then type or select a **Start Date** and **End Date** for your custom date range.
4. Click **Apply**.

   The list of Owner Statements is filtered and the date range you selected appears above the **Search Documents** text box.

Searching for Statements and Other Documents

On the **Documents** page, you can search the Owner *Statements* and *Other Documents* sections.

The search is performed on the statement and document names and only considers statements and documents that satisfy your current filter settings.

To search for Owner Statements and other documents:

1. On the **Documents** page, click the **Search Documents** text box and type some or all of the search text.

   The lists of Owner Statements and documents are filtered by your text as you type it.

2. Examine the remaining Owner Statements and documents to locate the document you searched for.

3. If you cannot locate the statement or document you are searching for:

   - Determine if there are multiple pages of statements or documents that satisfy your search text. The statement or document you are attempting to locate may not appear in the first page of results.
   - For statements, check your **Filter** settings. The **Search Documents** feature only considers statements that satisfy the active **Filter** settings. You may need to broaden your filter settings to include more statements. See Filtering the List of Owner Statements (on page 25) for more information.
   - Try typing a smaller portion of the statement or document's name in the **Search Documents** text box.

Sorting the List of Owner Statements

To sort the list of Owner Statements:

1. Click the column header to sort by, either **Portfolio** or **Statement Period**.

   The list of Owner Statements is sorted by the column header you clicked.

2. To reverse the sort order, click the same column header again.

   Clicking a column header sorts the entire list of Owner Statements, not just the Owner Statements that appear on the page of the list you are currently viewing.

Viewing an Owner Statement

To view a single Owner Statement:

1. In the list of Owner Statements, use Search Documents (on page 26), Filter (on page 25), and the page navigation (on page 29) tools to locate the statement you would like to view.
2. In the **Portfolio** column, click the name of the statement.

   The Owner Statement opens.

   > *You must have appropriate PDF software to open and view an Owner Statement.*

Downloading a Single Owner Statement

To download a single Owner Statement:

1. In the list of Owner Statements, use Search Documents (on page 26), Filter (on page 25), and the page navigation (on page 29) tools to locate the statement you would like to download.
2. In the **Download PDF** column, click the **Download** icon .

   The Owner Statement is downloaded and saved.

   > *You must have appropriate PDF software to open and view an Owner Statement.*

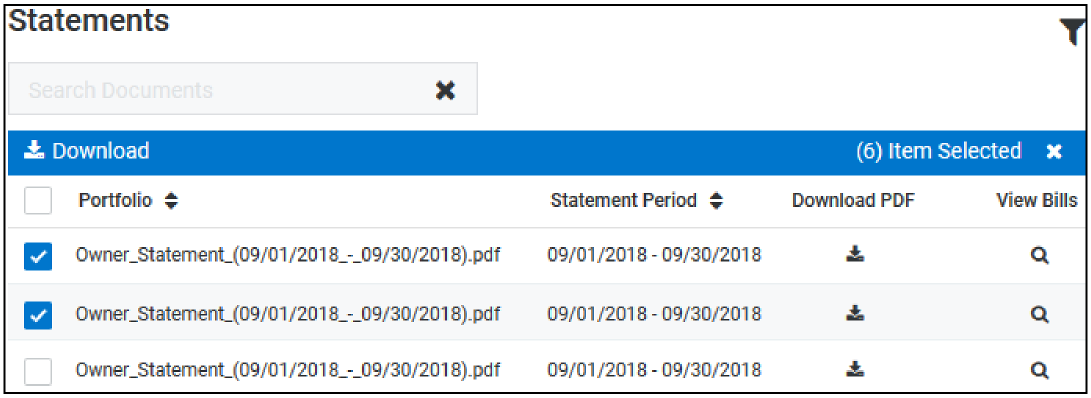
Downloading a Group of Owner Statements

To download a group of Owner Statements on the **Documents** page:

1. In the list of Owner Statements, use Search Documents (on page 26), Filter (on page 25), and the page navigation (on page 29) tools to locate the statements to download.
2. To download all Owner Statements in the list, select the checkbox at the top of the list, near the **Portfolio** column header.

   The checkboxes for every Owner Statement in the list are selected and the **Download** link appears above the list.
3. To download a specific group of Owner Statements, select the checkbox for each Owner Statement to be downloaded, including those on other pages of the list.

When you select a checkbox, the **Download** link appears above the list of Owner Statements.



4. Click the **Download** icon .

   The selected Owner Statements are downloaded as a ZIP file, which you can view or save.

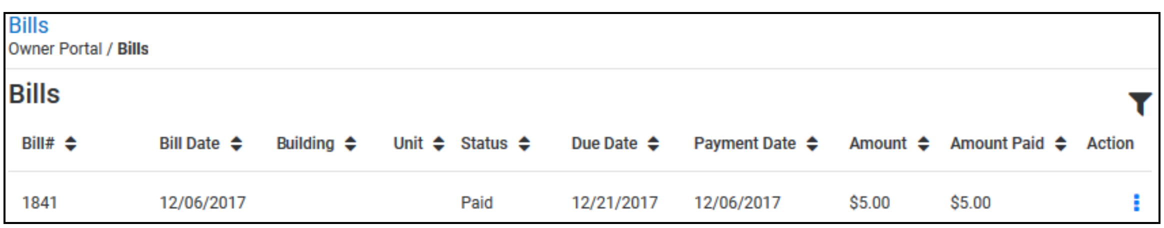
Viewing Bills for an Owner Statement

To view bills for an Owner Statement:

1. In the list of Owner Statements, use Search Documents (on page 26), Filter (on page 25), and the page navigation (on page 29) tools to locate the statement for which you would like to view associated bills.

2. Click the **View Bills** icon associated with the Owner Statement.

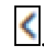
   The Bills (on page 37) page opens, with the **Period** date box in **Filters** set to a **Custom Date Range** that matches the date range of the Owner Statement. Any bills that match the date range are included in the list of bills.



See Bills (on page 37) for more information concerning bills.

Navigating the Statement and Documents Lists

To navigate through the list of Owner Statements or Other Documents when the list is longer than one page and manage the number of items that appear on a single page:

1. To set the maximum number of items that can appear on a single page, click the **Show XXX Entries** drop-down list, then select the number of entries to appear on a page.
2. To view a specific page of a list, click **Page XX of XX box**, then type the page number.
3. To go to the next or previous page, click the **Next** icon  or the **Previous** icon .

Documents - Other Documents Section

The *Other Documents* section of the **Documents** page lists documents your property management team uploaded to the Owner Portal. Owner Statements are not included in the **Other Documents** list.

In the *Other Documents* section, you can:

- Search for documents (on page 26) in the *Statements* and *Other Documents* sections.
- Sort the list of Other Documents (on page 31) by clicking the **File Name**, **Document Type**, **Size**, or **Uploaded** column header.
- View a document from the list of Other Documents (on page 32).
- Download documents from the list of Other Documents (on page 32).
- Navigate and manage the list of Other Documents (on page 29).

When your property manager uploads a document to the Owner Portal, you receive an email notification.

eSignature documents that require action are marked with an asterisk (*). When an eSignature document is completed, the corresponding document in the Owner Portal is updated and the completed fields are visible on the document.

Other Documents

File Name	Document Type	Size	Uploaded
Inspection COLLEGEPARKS (12/15/2014).pdf	Inspection	2k	6/17/2015
Inspection 123OAKST ().pdf	Inspection	7k	11/21/2013
Inspection SHAMROCK1 - UNITF ().pdf	Inspection	23k	2/21/2013
RentMoneyVoucher.pdf	Other	61k	10/23/2018
ePayEmailCampaignList_PW21930_part2.txt	Other	208k	6/26/2018
couple.gif	Other	25k	2/15/2010

Show 25 entries. 1-6 of 6 Page 1 of 1

Searching for Statements and Other Documents

On the **Documents** page, you can search the Owner *Statements* and *Other Documents* sections.

The search is performed on the statement and document names and only considers statements and documents that satisfy your current filter settings.

To search for Owner Statements and other documents:

1. On the **Documents** page, click the **Search Documents** text box and type some or all of the search text.

   The lists of Owner Statements and documents are filtered by your text as you type it.

2. Examine the remaining Owner Statements and documents to locate the document you searched for.

3. If you cannot locate the statement or document you are searching for:

   - Determine if there are multiple pages of statements or documents that satisfy your search text. The statement or document you are attempting to locate may not appear in the first page of results.
   - For statements, check your **Filter** settings. The **Search Documents** feature only considers statements that satisfy the active **Filter** settings. You may need to broaden your filter settings to include more statements. See Filtering the List of Owner Statements (on page 25) for more information.
   - Try typing a smaller portion of the statement or document's name in the **Search Documents** text box.

Sorting the List of Other Documents

To sort the list of Other Documents:

1. Click the column header to sort by: **File Name**, **Document Type**, **Size**, or **Uploaded**.

   The list of Other Documents is sorted by the column header you clicked.

2. To reverse the sort order, click the same column header again.

   Clicking a column header sorts the entire list of Other Documents, not just the documents that appear on the page of the list you are currently viewing.

Viewing a File from the Other Documents List

To view a file from the list of Other Documents:

1. In the list of Other Documents, use Search Documents (on page 26) and the page navigation (on page 29) tools to locate the file.
2. In the **File Name** column, click the file's name.

   The file opens.

   > You must have the appropriate software to view the file.

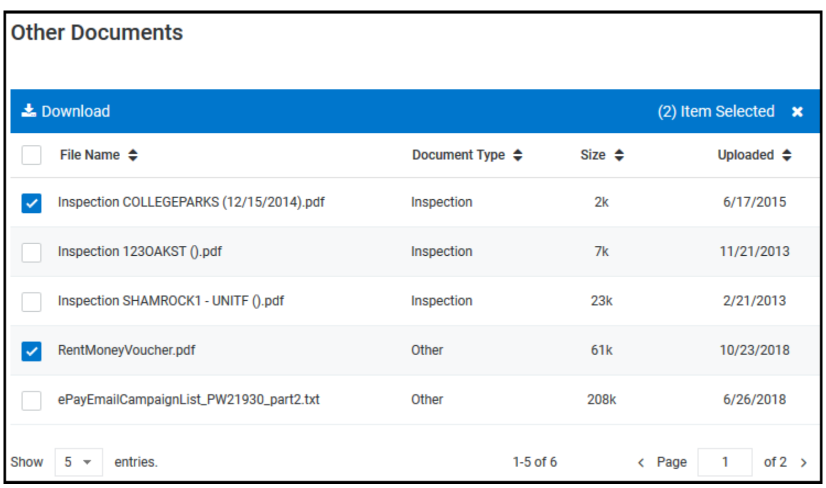
Downloading Files from the List of Other Documents

To download a file from the list of Other Documents:

1. In the list of Other Documents, use Search Documents (on page 26) and the page navigation (on page 29) tools to locate the files you would like to download.
2. To download all of the files in the list of Other Documents, select the checkbox at the top of the list, near the **File Name** column header.

   The checkboxes for every file in the list are selected and the **Download** link appears as a header above the list of Other Documents.
3. To download a specific group of files, select the checkbox associated with each file to be downloaded, including those on other pages of the list.

   When you select a checkbox, the **Download** link appears above the list.



4. Click the **Download** link.
5. The selected files are downloaded as a ZIP file, which you can view or save.

Navigating the Statement and Documents Lists

To navigate through the list of Owner Statements or Other Documents when the list is longer than one page and manage the number of items that appear on a single page:

1. To set the maximum number of items that can appear on a single page, click the **Show XXX Entries** drop-down list, then select the number of entries to appear on a page.
2. To view a specific page of a list, click **Page XX of XX box**, then type the page number.
3. To go to the next or previous page, click the **Next** icon or the **Previous** icon .

CHAPTER 6

Reports

On the **Reports** page, you can view the reports your property manager has published to your Owner Portal.

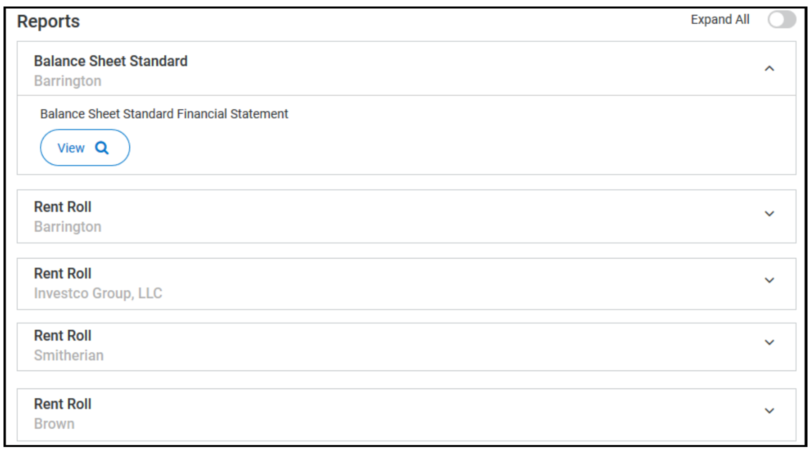
To watch a short video that describes this page, click the Video icon in the upper right corner of the page.

Each report in the list of reports on the Reports page includes the name of the report and the portfolio used to gather data for the report.

To view a report on the **Reports** page:

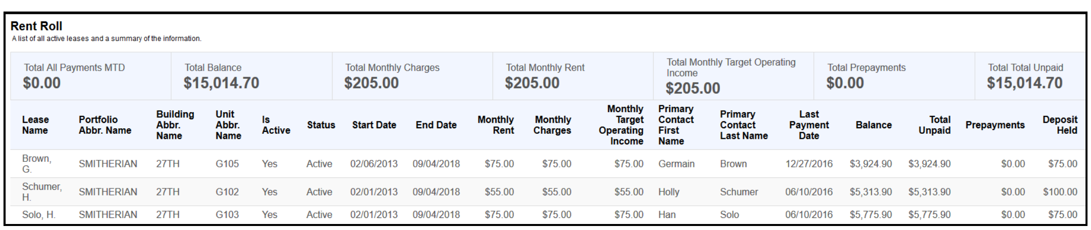
1. Using the report and portfolio names, locate the report you would like to view.
2. Click a report box to expand it, or, to expand all of the report boxes, click the **Expand All** toggle switch. The switch turns green when it is enabled.

   Expanded report boxes reveal the **View** button.



3. Click **View** for the report you would like to see.

   The report opens in a separate browser tab.



Rent Roll

A list of all active leases and a summary of the information.

Total All Payments MTD	Total Balance	Total Monthly Charges	Total Monthly Rent	Total Monthly Target Operating Income	Total Prepayments	Total Total Unpaid
$0.00	$15,014.70	$205.00	$205.00	$205.00	$0.00	$15,014.70

Lease Name	Portfolio Abbr. Name	Building Abbr. Name	Unit Abbr. Name	Is Active	Status	Start Date	End Date	Monthly Rent	Monthly Charges	Monthly Target Operating Income	Primary Contact First Name	Primary Contact Last Name	Last Payment Date	Balance	Total Unpaid	Prepayments	Deposit Held
Brown, G.	SMITHERIAN	27TH	G105	Yes	Active	02/06/2013	09/04/2018	$75.00	$75.00	$75.00	Germain	Brown	12/27/2016	$3,924.90	$3,924.90	$0.00	$75.00
Schumer, H.	SMITHERIAN	27TH	G102	Yes	Active	02/01/2013	09/04/2018	$55.00	$55.00	$55.00	Holly	Schumer	06/10/2016	$5,313.90	$5,313.90	$0.00	$100.00
Solo, H.	SMITHERIAN	27TH	G103	Yes	Active	02/01/2013	09/04/2018	$75.00	$75.00	$75.00	Han	Solo	06/10/2016	$5,775.90	$5,775.90	$0.00	$75.00

CHAPTER 7

Bills

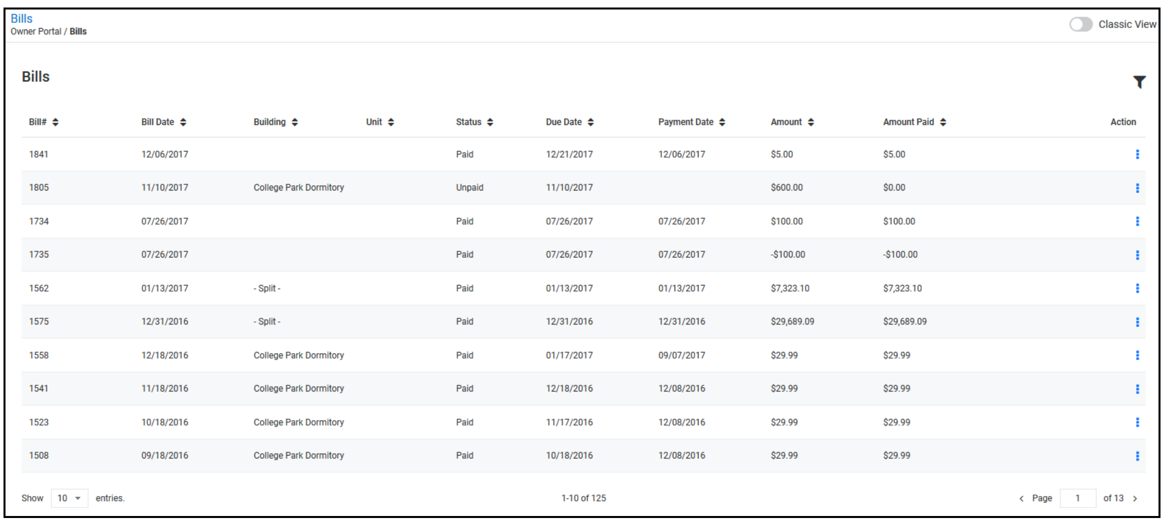
If your property management company configures the Owner Portal to allow you to view bills, you can use the **Bills** page to review bills and payments that have been recorded for your rental property.

To watch a short video that describes this page, click the **Video** *icon in the upper right corner of the page.*

These bills include a breakdown of the expense line items, descriptions, and invoices from vendors (if the property manager scans and attaches invoices to bills).

On the **Bills** page, you can:

- Filter the list of bills (on page 38) by **Bill Date/Payment Date**, **Status**, or **Period**.
- Sort the list of bills (on page 39) by clicking a column header.
- View **Bill Details** (on page 39) for a bill.
- Generate a PDF (on page 40) version of an Invoice.
- View an Invoice (on page 40).
- Navigate and manage (on page 41) the list of bills.


Bills
Owner Portal / Bills
Classic View

Bills

Bill#	Bill Date	Building	Unit	Status	Due Date	Payment Date	Amount	Amount Paid	Action
1841	12/06/2017			Paid	12/21/2017	12/06/2017	$5.00	$5.00	
1805	11/10/2017	College Park Dormitory		Unpaid	11/10/2017		$600.00	$0.00	
1734	07/26/2017			Paid	07/26/2017	07/26/2017	$100.00	$100.00	
1735	07/26/2017			Paid	07/26/2017	07/26/2017	-$100.00	-$100.00	
1562	01/13/2017	- Split -		Paid	01/13/2017	01/13/2017	$7,323.10	$7,323.10	
1575	12/31/2016	- Split -		Paid	12/31/2016	12/31/2016	$29,689.09	$29,689.09	
1558	12/18/2016	College Park Dormitory		Paid	01/17/2017	09/07/2017	$29.99	$29.99	
1541	11/18/2016	College Park Dormitory		Paid	12/18/2016	12/08/2016	$29.99	$29.99	
1523	10/18/2016	College Park Dormitory		Paid	11/17/2016	12/08/2016	$29.99	$29.99	
1508	09/18/2016	College Park Dormitory		Paid	10/18/2016	12/08/2016	$29.99	$29.99	

Show 10 entries. 1-10 of 125 Page 1 of 13

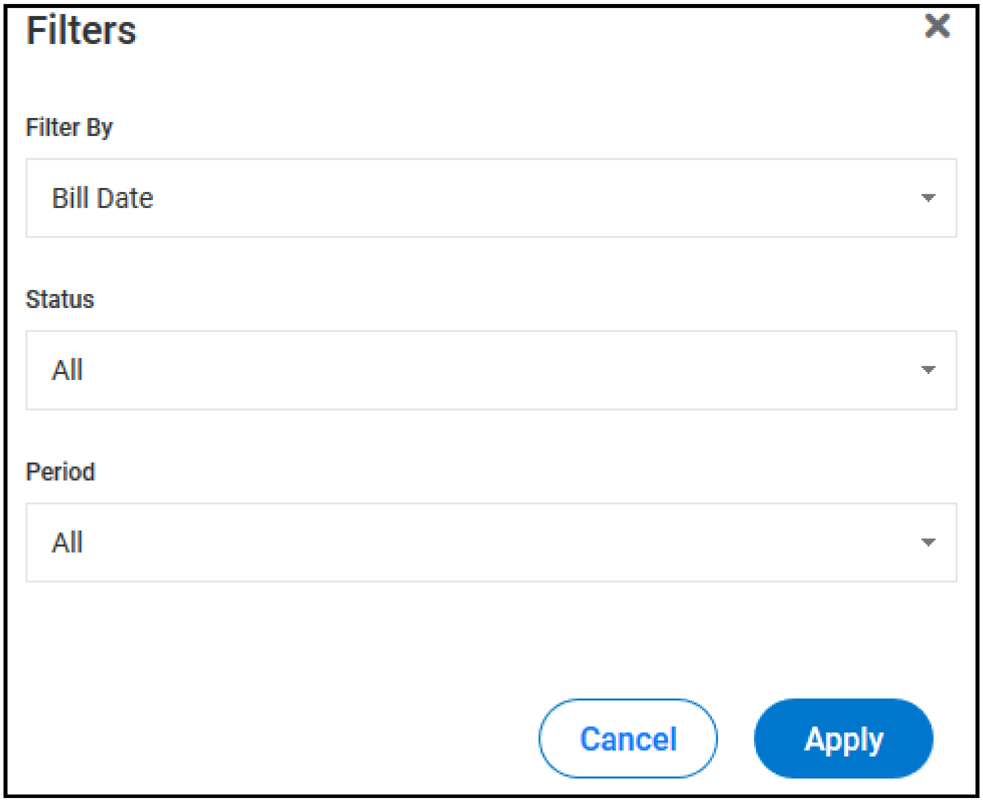
In This Chapter

Filtering the list of Bills

To filter the list of Bills:

1. Click the **Filter** icon .

   The **Filters** panel appears.



2. In the **Filter By** drop-down list, select a “Bill Date” or “Payment Date”.
3. In the **Status** drop-down list, select “All”, “Paid”, or “Unpaid”.
4. In the **Period** drop-down list:

   - Select a preset date range (“Last Year”, “This Month”, etc.).

   - or -

   - Select “Custom Date Range” then type or select a **Start Date** and **End Date** for your custom date range.

5. Click **Apply**.

   The list of bills is filtered according to your selections.

Sorting the List of Bills

To sort the list of bills:

1. In the list of bills, click a column header.
2. To reverse the sort order, click the same column header again.

Clicking a column header sorts the entire list of bills, not just the bills that appear on the page of the list you are currently viewing.

Viewing Bill Details

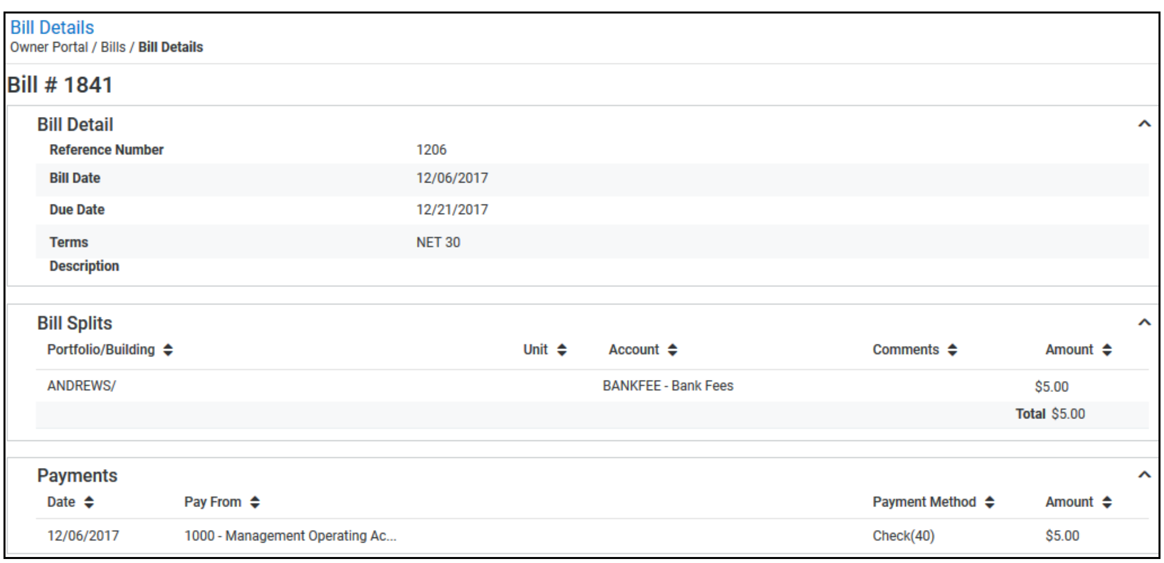
To view the details of a bill that appears in the list of bills:

1. For the appropriate bill, click the **Action** icon .

   The list of available actions appears.

2. In the list of available actions, select **View Detail**.

   The **Bill Details** page opens.

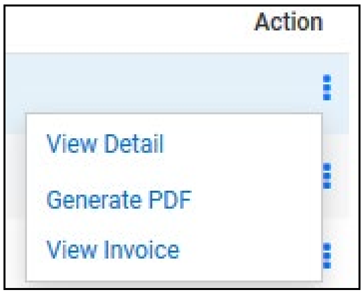


Generating a PDF Version of an Invoice

To generate a PDF version of a bill's details:

1. For the appropriate bill, click the **Action** icon .

   The list of available actions appears.

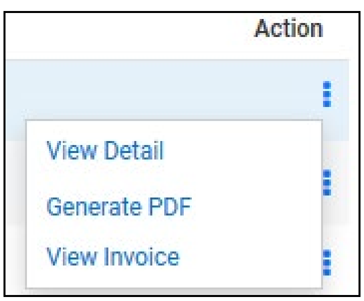
2. In the list of available actions, select **Generate PDF**.
3. If a browser dialog box opens, select the appropriate action to take.

Viewing an Invoice

To view an invoice:

1. For the appropriate bill, click the **Action** icon .

   The list of available actions appears.

2. In the list of available actions, select **View Invoice**.

   A PDF version of the invoice opens.

Navigating and Managing the List of Bills

To navigate a list with more than one page or set the maximum number of items per page:

1. To set the maximum number of items per page, click the **Show XXX Entries** drop-down list, then select the maximum number of items per page.
2. To view a specific page in the list, click the **Page XX of XX** box, then type the page number.
3. To go to the next or previous page, click the **Next** icon  or the **Previous** icon .

CHAPTER 8

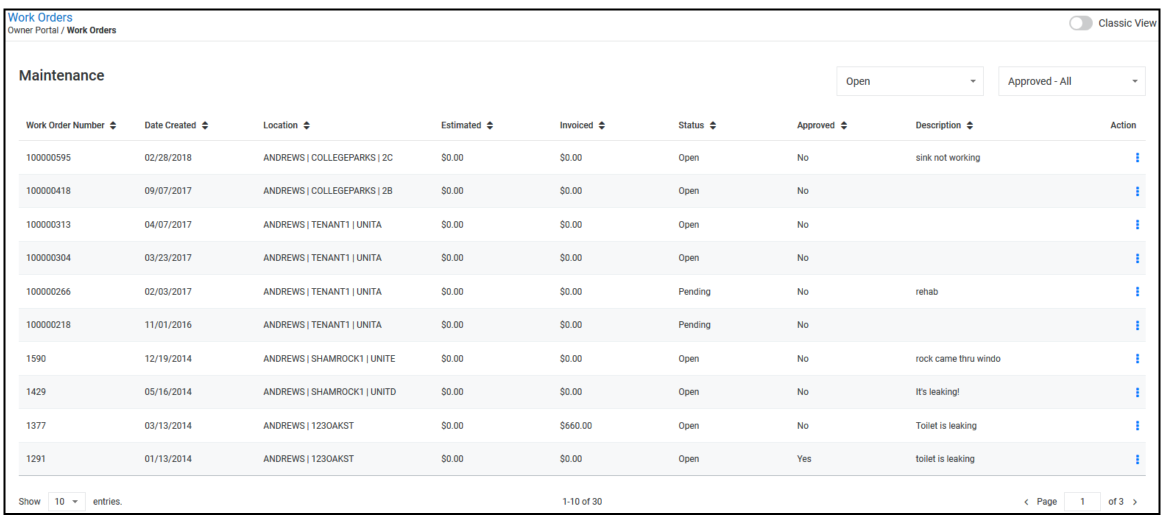
Maintenance

If your property management company configures the Owner Portal to allow you to view work orders, you can use the **Maintenance** page to view work orders created by the management team. The property management company also determines the level of detail you can see for each work order.

To watch a short video that describes this page, click the Video icon in the upper right corner of the page.

On the **Maintenance** page, you can:

- Filter the list of work orders by clicking the **Status** drop-down list (on page 44), then selecting the **Status** to use as a filter.
- Filter the list of work orders by clicking the **Approved** drop-down list (on page 44), then selecting the approval status to use as a filter.
- Sort the list of work orders by clicking a column header (on page 44).
- **View Details** for a work order (on page 45).
- **Approve** or **Reject** a work order (on page 46). **Approve** and **Reject** are only available if your property management company requires approvals for work orders. **Approve** and **Reject** are only available for open, unapproved work orders.
- Navigate and manage the list of work orders (on page 46).



<table>
<tr><th>Work Order Number</th><th>Date Created</th><th>Location</th><th>Estimated</th><th>Invoiced</th><th>Status</th><th>Approved</th><th>Description</th><th>Action</th></tr>
<tr><td>100000595</td><td>02/28/2018</td><td>ANDREWS | COLLEGEPARKS | 2C</td><td>$0.00</td><td>$0.00</td><td>Open</td><td>No</td><td>sink not working</td><td></td></tr>
<tr><td>100000418</td><td>09/07/2017</td><td>ANDREWS | COLLEGEPARKS | 2B</td><td>$0.00</td><td>$0.00</td><td>Open</td><td>No</td><td></td><td></td></tr>
<tr><td>100000313</td><td>04/07/2017</td><td>ANDREWS | TENANT1 | UNITA</td><td>$0.00</td><td>$0.00</td><td>Open</td><td>No</td><td></td><td></td></tr>
<tr><td>100000304</td><td>03/23/2017</td><td>ANDREWS | TENANT1 | UNITA</td><td>$0.00</td><td>$0.00</td><td>Open</td><td>No</td><td></td><td></td></tr>
<tr><td>100000266</td><td>02/03/2017</td><td>ANDREWS | TENANT1 | UNITA</td><td>$0.00</td><td>$0.00</td><td>Pending</td><td>No</td><td>rehab</td><td></td></tr>
<tr><td>100000218</td><td>11/01/2016</td><td>ANDREWS | TENANT1 | UNITA</td><td>$0.00</td><td>$0.00</td><td>Pending</td><td>No</td><td></td><td></td></tr>
<tr><td>1590</td><td>12/19/2014</td><td>ANDREWS | SHAMROCK1 | UNITE</td><td>$0.00</td><td>$0.00</td><td>Open</td><td>No</td><td>rock came thru windo</td><td></td></tr>
<tr><td>1429</td><td>05/16/2014</td><td>ANDREWS | SHAMROCK1 | UNITD</td><td>$0.00</td><td>$0.00</td><td>Open</td><td>No</td><td>It's leaking!</td><td></td></tr>
<tr><td>1377</td><td>03/13/2014</td><td>ANDREWS | 123OAKST</td><td>$0.00</td><td>$660.00</td><td>Open</td><td>No</td><td>Toilet is leaking</td><td></td></tr>
<tr><td>1291</td><td>01/13/2014</td><td>ANDREWS | 123OAKST</td><td>$0.00</td><td>$0.00</td><td>Open</td><td>Yes</td><td>toilet is leaking</td><td></td></tr>
</table>

In This Chapter

Filtering the List of Work Orders

To filter the list of work orders by **Status** or **Approval**:

1. Click the **Status** or **Approval** drop-down list, then select the appropriate item.
2. From the **Status** drop-down list, select:
   - **Status - All**: select to include all work orders.
   - **Open**: select to include only open work orders.
   - **Closed**: select to include only closed work orders.
3. From the **Approved** drop-down list, select:
   - **Approved - All**: select to include all work orders.
   - **Approved**: select to include only approved work orders.
   - **Unapproved**: select to include only unapproved work orders.

Sorting the List of Work Orders

To sort the list of work orders on the **Maintenance** page:

1. Click a column header to sort by.

   The list of work orders is sorted by the column header you clicked.
2. To reverse the sort order, click the same column header again.

   Clicking a column header sorts the entire list of work orders, not just the work orders that appear on the page of the list you are currently viewing.

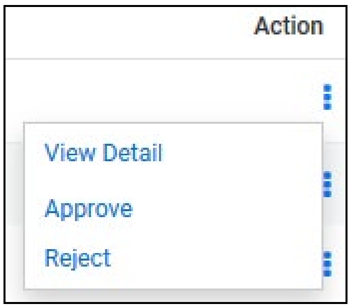
Viewing Work Order Details

If your property management company configured the Owner Portal to allow you to view work order details, you can use the **Action** icon to view them.

To view the details of a work order:

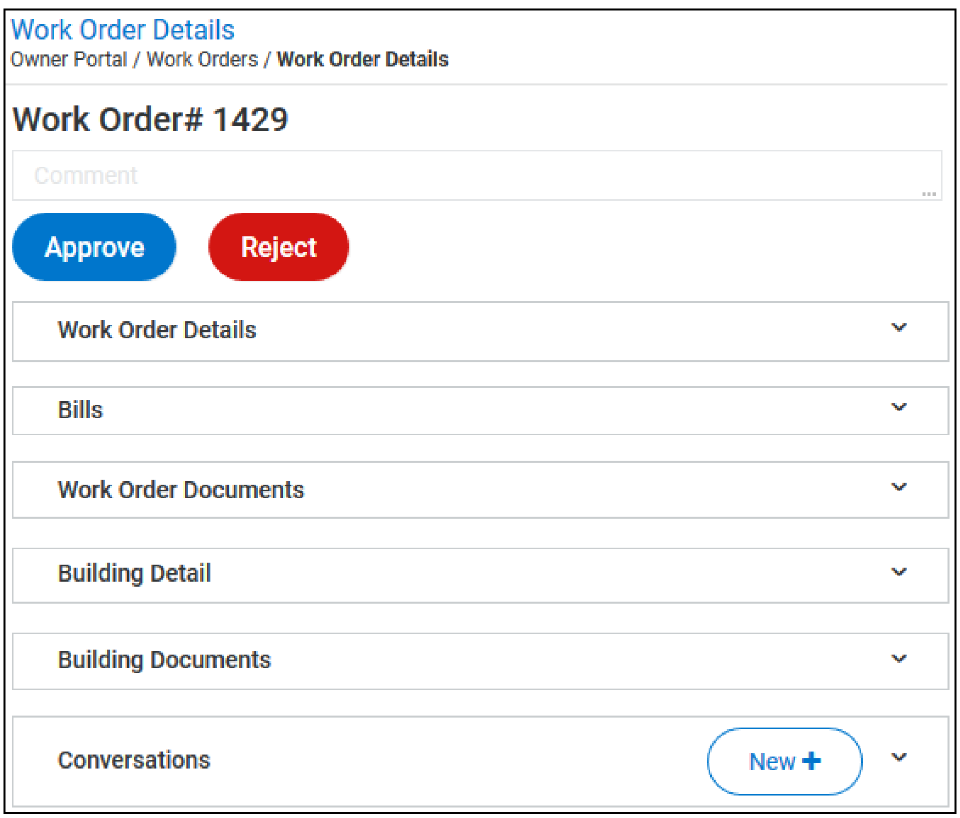
1. Click the **Action** icon for the work order.

   The list of available actions appears.



2. From the list of available actions, select **View Detail**.

   The **Work Order Details** page opens.



3. For open, unapproved work orders, the **Work Order Details** page includes the **Approve** and **Reject** buttons:

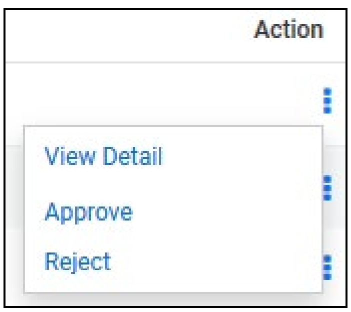
   - Click **Approve** to approve the work order. The **Approve** and **Reject** buttons disappear, and a confirmation message appears below the **Work Order #**.
   - Click **Reject** to reject the work order. The **Approve** and **Reject** buttons disappear, and a confirmation message appears below the **Work Order #**.

Approving or Rejecting Work Orders

To approve or reject a work order from the list of work orders (if your property management company requires approval):

1. For the appropriate work order, click the **Action** icon .

   The list of available actions appears. **Approve** and **Reject** are only available for open, unapproved work orders.



2. To approve the work order, select **Approve**.

   The work order is approved and a confirmation message appears.

3. To reject the work order, select **Reject**.

   The work order is rejected and a confirmation message appears.

Navigating and Managing the List of Work Orders

To navigate the list of work orders when the list is longer than one page or manage the maximum number of items per page:

1. To set the maximum number of items per page, click the **Show XXX Entries** drop-down list, then select a number.
2. To view a specific page in the list, click the **Page XX of XX box**, then type the desired page number.
3. To go to the next or previous page, click the **Next** icon or the **Previous** icon .

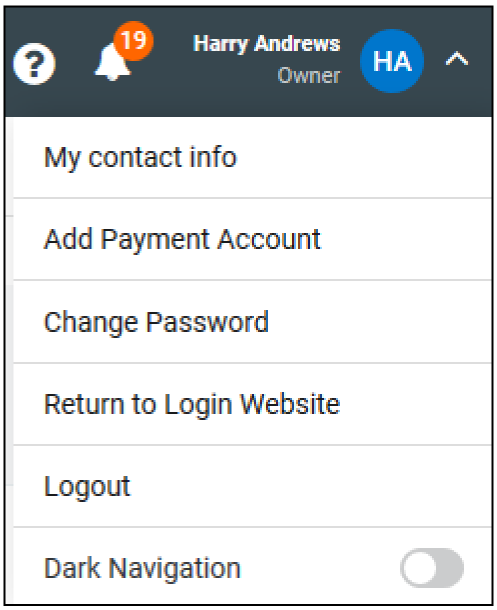
CHAPTER 9

User Menu

In the New View, the **User Menu** is located in the upper right corner of each page.

From the **User Menu**, you can:

- Update your contact information (on page 49).
- Add a payment account (on page 50) (only available if your property management company configures the Owner Portal to allow you to add or delete bank information).
- Change your password. (on page 51)
- Return to your property manager's website. (on page 52)
- Log out of the Owner Portal. (on page 53)
- Switch to the **Dark Navigation** view. (on page 53)



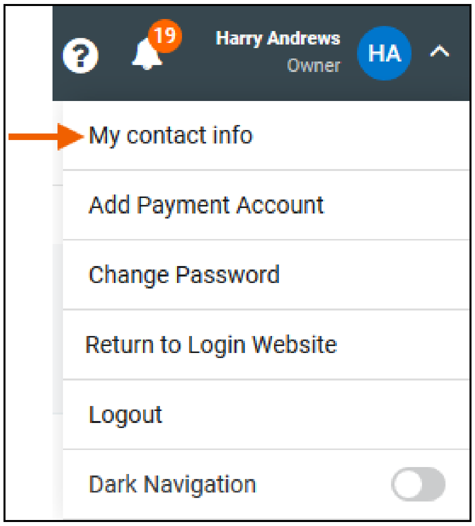
In This Chapter

Viewing or Editing My Contact Info

To open the **Contact Info** page:

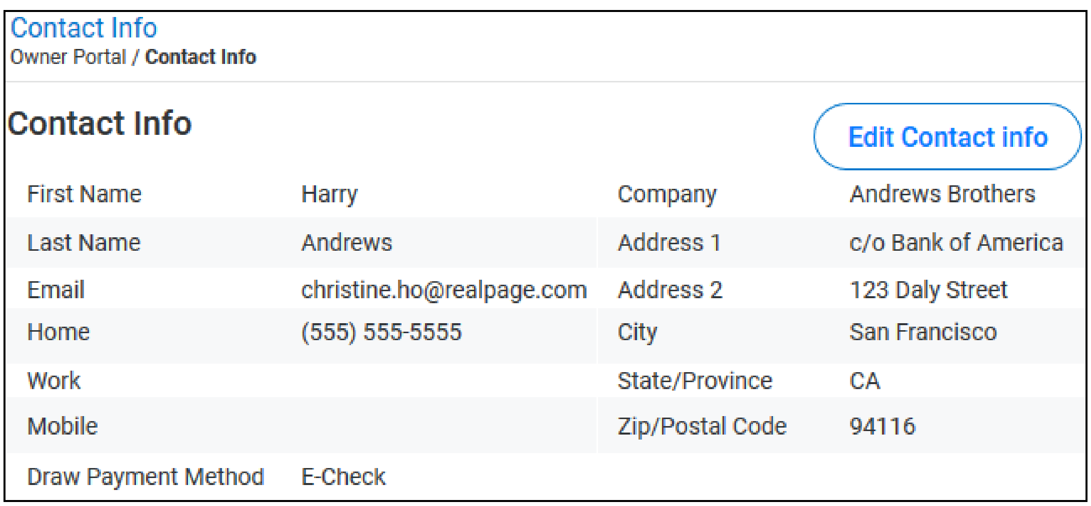
1. Click your name/profile picture.

   The **User Menu** opens.



2. Select **My Contact Info**.

   The **Contact Info** page opens.



3. Click **Edit Contact Info** to update your contact information.

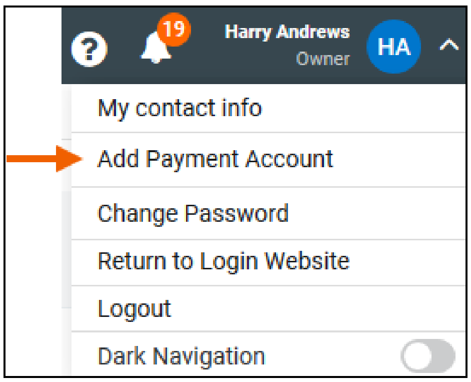
Adding a Payment Account from the User Menu

Add Payment Account is only available if your property management company configures the Owner Portal to allow you to add or delete bank information.

To add a payment account from the **User Menu**:

1. Click your name/profile picture.

   The **User Menu** opens.

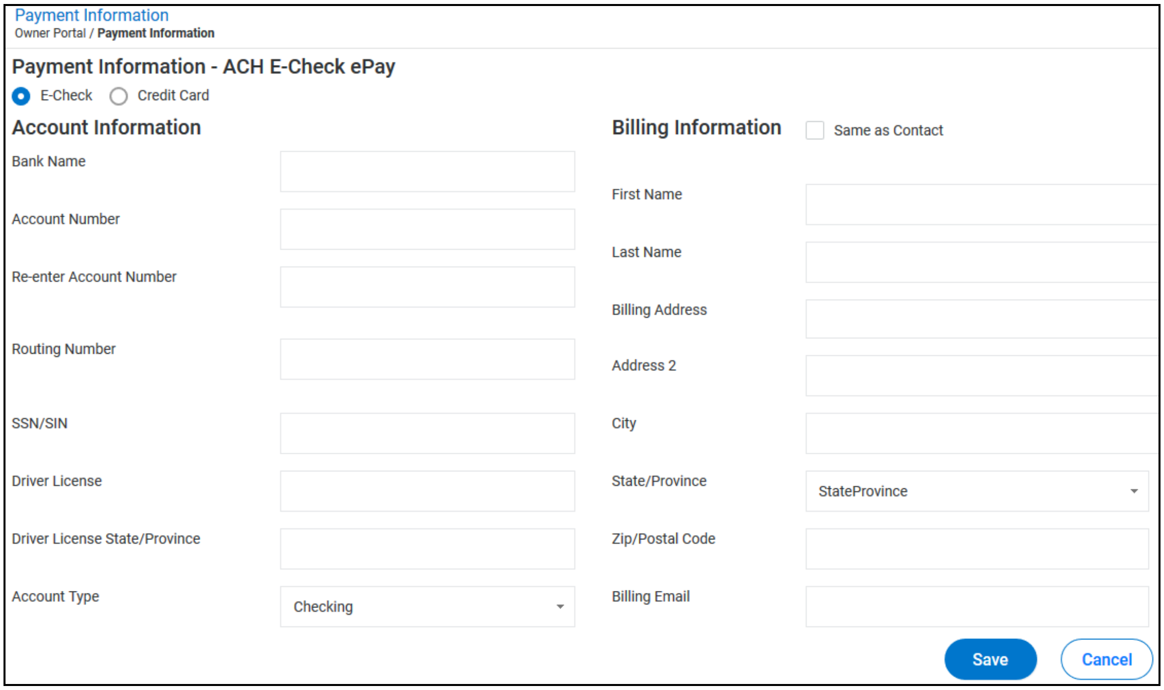
2. Select **Add Payment Account**.

   The **Payment Information** page opens.

   You can also access the **Payment Information** *page by clicking* **Add Payment Account** *on the* **My Dashboard** *page.*

3. To add an **E-Check** account, select **E-Check**.
4. To add a **Credit Card** account, select **Credit Card**.

5. Provide the required information, then click **Save**.

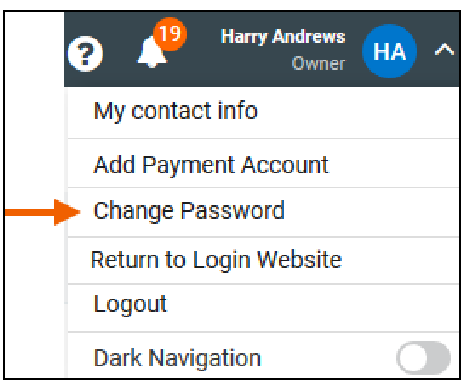


Changing Your Owner Portal Password

To change your password from the **User Menu**:

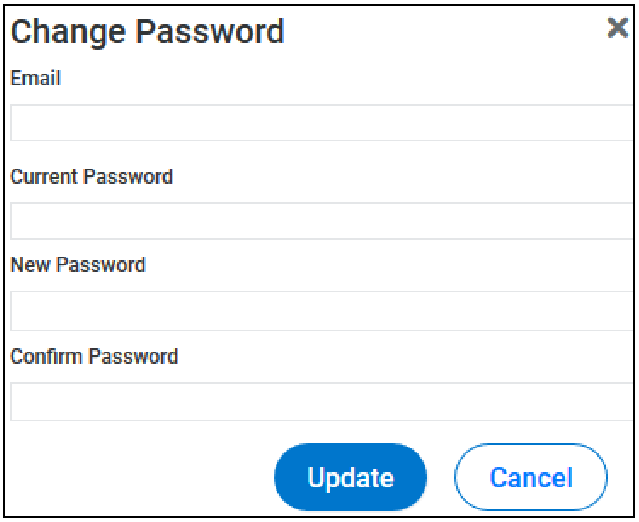
1. Click your name/profile picture.

   The **User Menu** opens.



2. Click **Change Password**.

The **Change Password** panel appears.



3. Provide the required information, then click **Update.**

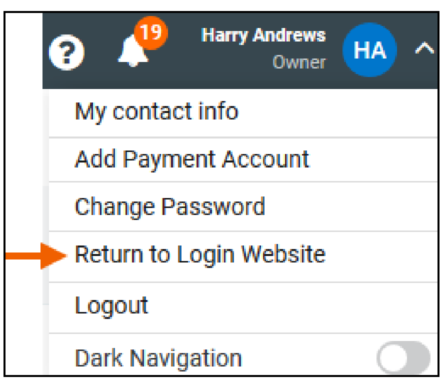
Using Return to...

Your property management company determines the website the **Return to...** link opens. Normally, the **Return to**... link opens the property manager's main website, but your property manager can configure the link to open any web address.

To open the **Return to...** website:

1. Click your name/profile picture.

   The **User Menu** opens.



2. Select **Return to...**

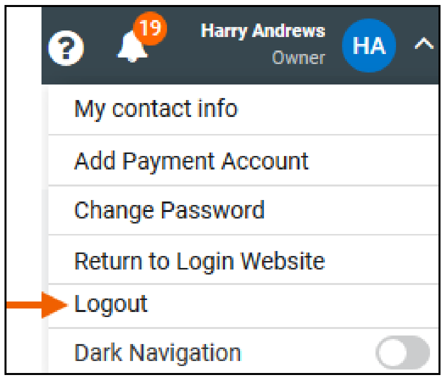
   The configured website opens.

Logging Out of the Owner Portal

To log out of the Owner Portal from the **User Menu**:

1. Click your name/profile picture.

   The **User Menu** opens.



2. Select **Logout**.

   You are logged out of the Owner Portal and returned to the Owner Portal login page.

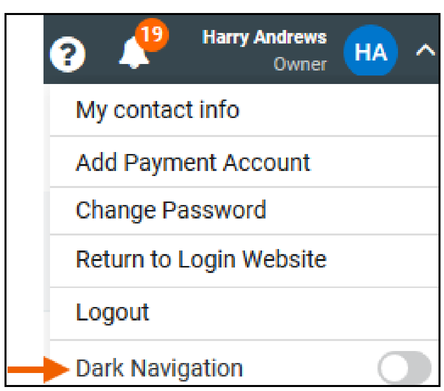
Switching to Dark Navigation

Dark Navigation reverses the text and background colors in the **Navigation** menu.

To switch to **Dark Navigation**:

1. Click your name/profile picture.

   The **User Menu** opens.



2. Select **Dark Navigation**.

The view switches to the **Dark Navigation** view, with light text and dark backgrounds in the **Navigation Menu**.