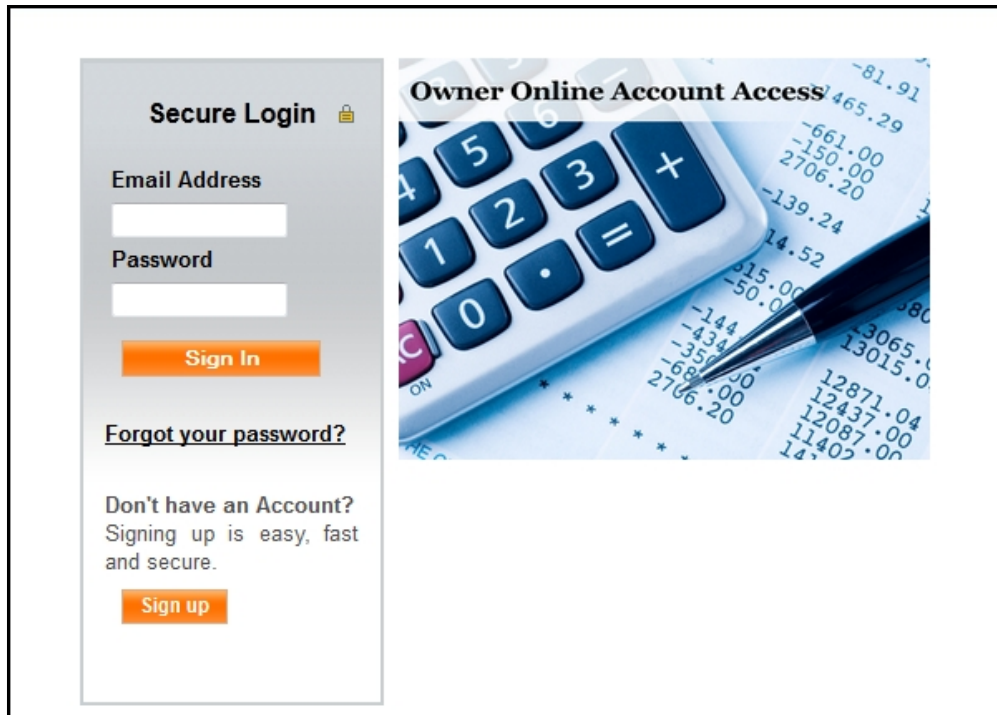


# Owner Portal Guide (O-102)

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The Owner Portal is a special area of your property manager's web site 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.
- Add a payment profile for electronic debits and credits.
- Update contact information.

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- Making a Contribution

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## Getting Started with the Owner Portal

Access the Owner Portal from your property manager's web site. You should see an obvious link that takes you to the Owner Portal **Sign-On** page.

Home  
Rentals  
Tenant Application  
Confirmation  
Contact Agent  
Tenants  
**Owners**  
Contact Us  
About Us

**Secure Login**

Email Address

Password

**Sign In**

[Forgot your password?](#)

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

**Sign up**

**Owner Online Account Access**

## Signing Up for a Portal Account

1. If you don't have an account for the Owner Portal, click the **Sign Up** button to request one.
2. The **Sign-up** page opens. Complete all the required fields and click the **Submit** button. The information you submit must match to the information on file for you with your property management company.

**Signup**

Signup to receive a login account

First Name

Last Name

Email

Address

Address 2

City

State/Province

Zip/Postal Code

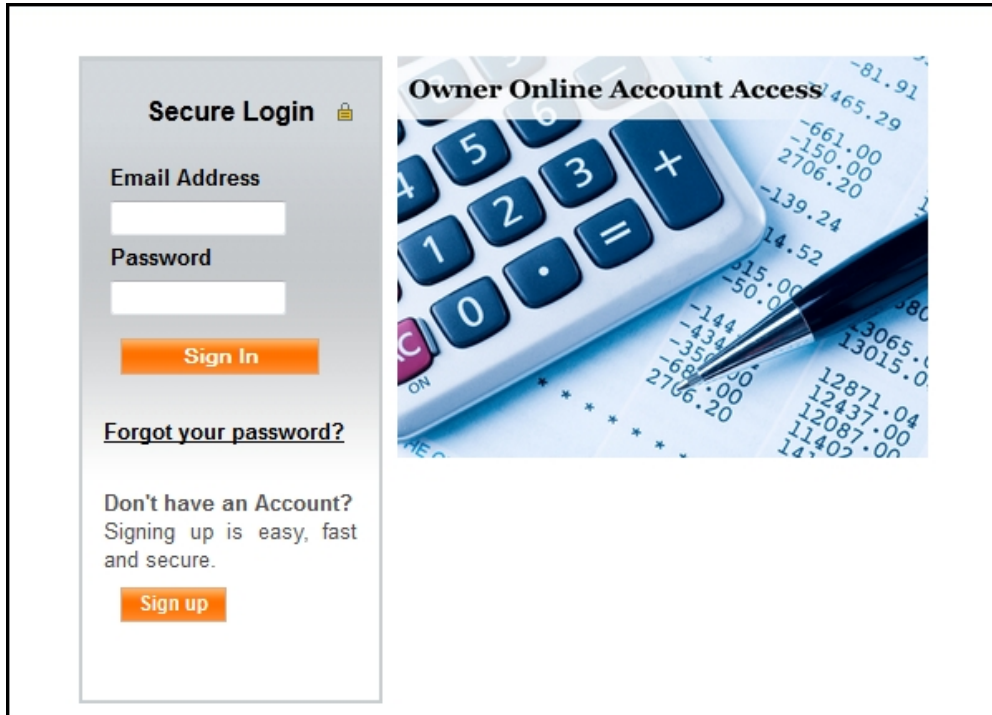
Comments

**Submit** **Cancel**

3. Your request is sent to your property manager, who will activate your Owner Portal account. When your account is activated, you will receive an e-mail message with sign-on instructions.

### Signing On to the Portal

You must have an e-mail address to have an account to your owner portal. Your property manager uses this address to set up your account and sends you an e-mail message with sign-on instructions to your portal. In most cases, your e-mail address is the username.



1. Enter your e-mail address in the **E-mail Address** field.
2. Enter the password provided in the e-mail message you received.
3. Click the **Sign In** button.

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

### 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. The **Maintenance** tab only appears if the management company has implemented online service requests and work orders on the Owner Portal.



### My Account

Use the **My Account** page to view your contact information, alerts for unpaid bills and conversations with the property management team. The **My Account** screen is made up of four sections: **Community Message**, **My Alerts**, **My Contact Information**, and **Conversations**.

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

 **Welcome Ann Barrington!**

[Set My Photo](#)

**Community Message**

Hi Owners, Today is our 20 year anniversary, please stop by for refreshments and a chance to meet your property manager. Refreshments begin at 12:00pm.


**My Alerts**


You Have **29** Unpaid Bill(s)  
 You Have **12** Work Order(s) Pending Approval


**My Contact Information** [View Detail](#) [Edit](#)

Home Phone	(415) 820-2012
Work Phone	(415) 650-8555
Mobile Phone	(415) 648-7090
Email	kvnslltry@gmail.com

**Conversations** [New Conversation](#)

 **Barrington** — Ann Barrington Please inspect 101 Main St  
 05/03/2013 8:41 AM — [Comment](#)

 **Propertyware User PW** We can do this next week during the day or this week in the evening.  
 What's your priority?  
 Today at 10:49 AM

 **Barrington** — Steve Barrington Can you pay me online, since I will be out of the country?  
 06/21/2012 2:01 PM — [Comment](#)

### Community Message

Your property manager uses this area to post messages to all property owners.

### My Alerts

The *My Alerts* section shows links to unpaid bills. Click a number link to go directly to the **Bills**.

**My Alerts**

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



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

**Note:**

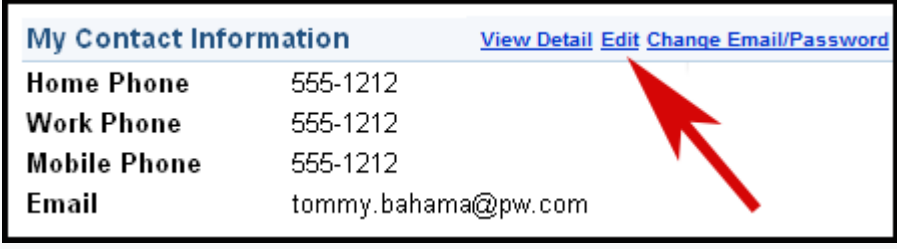
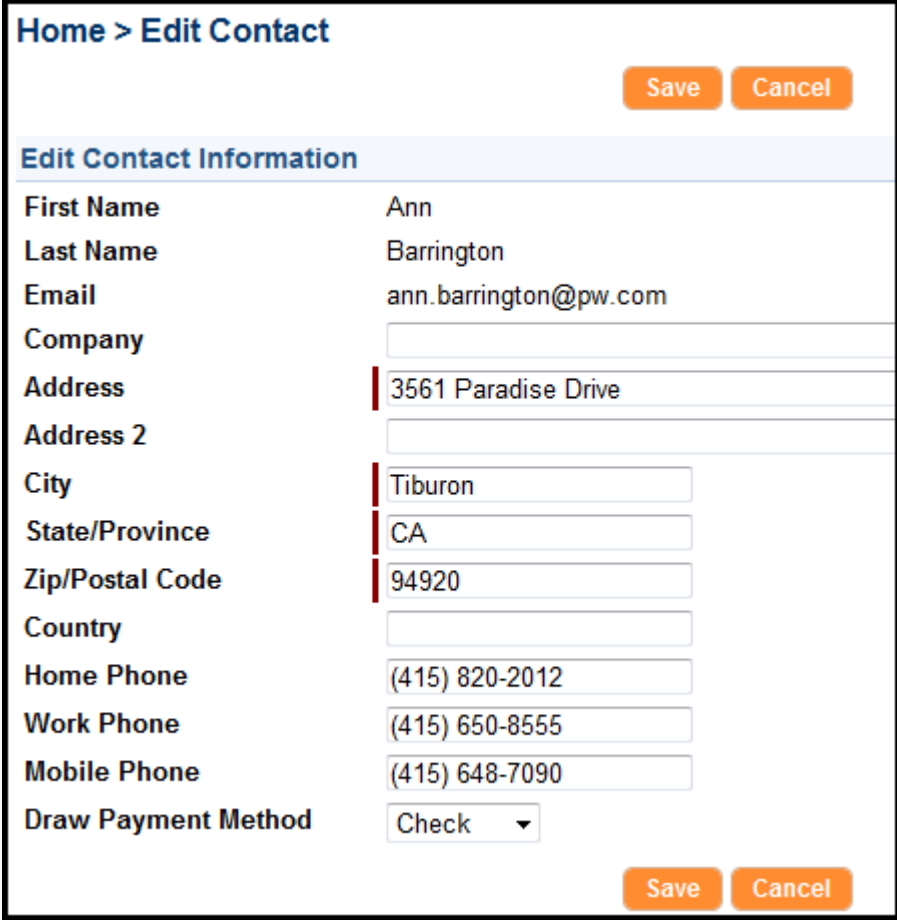

Work Order alerts only appear if the management company is using online work orders in the Owner Portal.

### My Contact Information

The **My Contact Information** section displays your contact information. There are two links that allow you to manage your account information: **Edit** and **Change E-mail/Password**.

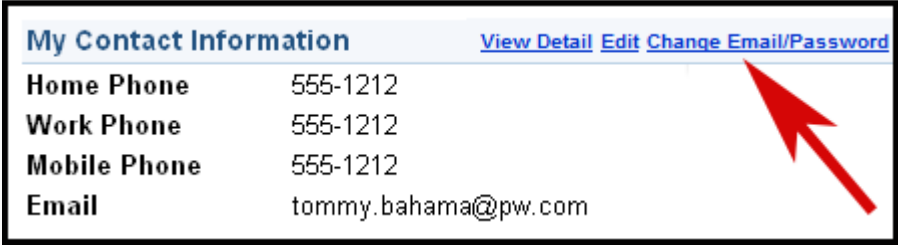
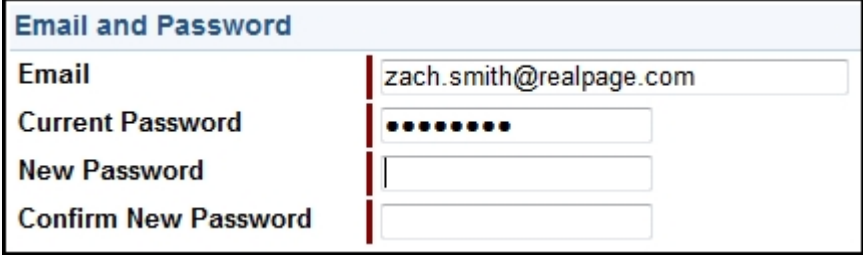

### Changing Your Address and Phone Numbers

Use the **Edit** link to update your address and phone contact information or your payment method.

Step	Action/Page
From the <b>My Account</b> page, click the <b>Edit</b> link.	 <p>The screenshot shows the 'My Contact Information' section of a user's account. It lists the following information: Home Phone (555-1212), Work Phone (555-1212), Mobile Phone (555-1212), and Email (tommy.bahama@pw.com). At the top right, there are two links: 'View Detail' and 'Edit Change Email/Password'. A red arrow points to the 'Edit Change Email/Password' link.</p>
Update the relevant fields.	 <p>The screenshot shows the 'Home &gt; Edit Contact' page. It features a 'Save' and 'Cancel' button at the top right. Below the header is the 'Edit Contact Information' form with 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). There are 'Save' and 'Cancel' buttons at the bottom right.</p>
Click the <b>Save</b> button.	 <p>A close-up screenshot of the 'Save' and 'Cancel' buttons. A mouse cursor is clicking on the 'Save' button.</p>

## Changing Your E-mail Address or Password

Use the **Change E-mail/Password** link to manage your Owner Portal sign-on.

Step	Action/Page
From the <b>My Account</b> page, click the <b>Change E-mail/Password</b> link.	 <p><b>My Contact Information</b> <a href="#">View Detail</a> <a href="#">Edit</a> <a href="#">Change Email/Password</a></p> <p><b>Home Phone</b> 555-1212 <b>Work Phone</b> 555-1212 <b>Mobile Phone</b> 555-1212 <b>Email</b> tommy.bahama@pw.com</p>
Update your e-mail address, if necessary. To change your Owner Portal sign-on, enter your current and new passwords.	 <p><b>Email and Password</b></p> <p><b>Email</b> zach.smith@realpage.com <b>Current Password</b> ●●●●●● <b>New Password</b> <b>Confirm New Password</b></p>
Click the <b>Save</b> button.	 <p><b>Save</b> <b>Cancel</b></p>

## Managing Your Payment Accounts

Your **Draw Payment Method**, which is how the management company pays you. Service Star Realty only uses ACH or E-Checks and not paper checks. The papercheck option is not currently offered. Please choose an E-Check, which deposits your draws directly into your bank account by electronically.

The **View Contact Info** page shows you all of your current account settings, including your current **Draw Payment Method** and your **Payment Account**. The *Payment Account* account defines how you make and receive online payments.

Home > View Contact Info

[Edit](#) [Edit Payment Account](#) [Change Email and Password](#)

**Contact Information**

First Name	Amanda
Last Name	Troutman
Email	zach.smith@realpage.com
Company	
Address	6755 Westchester
Address 2	
City	Reno
State/Province	Nevada
Zip/Postal Code	87662
Country	
Home Phone	
Work Phone	
Mobile Phone	
Draw Payment Method	E-Check

**Payment Account**

Payment Method	E-Check
Bank Name	City Bank
Account Type	Checking
Routing Number	307075259
Account Number	XXXXXXXXXXXX4444

**Billing Information**

Billing Address	123 Main
Address 2	
City	San Francisco
State/Province	CA
Zip/Postal Code	94114
Billing Email	



To change your **Payment Account** information, click the **Edit Payment Account** button at the top of the page.

Home > View Contact Info

[Edit](#) [Edit Payment Account](#) [Change Email and Password](#)



Complete the information about the bank account you want to use to make or receive electronic payments.

**Payment Method**

None
  **ACH** E-Check
  Credit Card

Please enter your bank account information exactly as it appears on your check. ACH payments submitted without accurate routing and account numbers will not be processed and subject to a non-sufficient funds fee.

**Bank Name** | CityBank  
**Account Type** | Checking  
**Routing Number** | 307075259  
**Account Number** | 987767765489

☐☐☐☐☐☐ 7694 ☐☐☐☐☐☐ 7891 ☐☐☐☐☐☐  
 Routing Number    Account Number    Check Number

**SSN/SIN** | 999777669  
**Drivers License #** | 7788877665  
**Drivers License State/Province** | CA



Make sure the billing address is correct on the right side of the page.

Billing Information	
	<input type="checkbox"/> Same as Contact
Billing Address	<input type="text" value="123 Main"/>
Address 2	<input type="text"/>
City	<input type="text" value="San Francisco"/>
State/Province	<input type="text" value="CA"/>
Zip/Postal Code	<input type="text" value="94114"/>
Billing Email	<input type="text"/>

Click the **Save** button.




## 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. These conversations are in read-only mode. This means you can view the conversation but you cannot participate.
- Your conversations between you and your property managers.


The *Conversations* section contains only active conversations. For each conversation, the name of the person who began the conversation is shown, along with the date and time. Each response in the conversation is listed below that, with the name, date and time.


**Conversations** [New Conversation](#)

 **Barrington** — Ann Barrington Please inspect 101 Main St  
05/03/2013 8:41 AM — [Comment](#)

 **Propertyware User PW** We can do this next week during the day or this week in the evening.  
What's your priority?  
Today at 10:49 AM

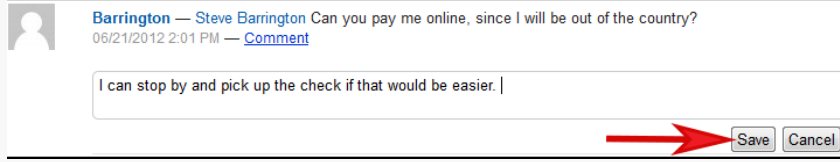
 **Barrington** — Steve Barrington Can you pay me online, since I will be out of the country?  
06/21/2012 2:01 PM — [Comment](#)

 **Barrington** — Propertyware User Please keep in mind that all statements will now be out on the 10th of the month. Thanks!  
06/14/2012 11:10 PM — [Comment](#)

 **Steve Barrington** Thanks!  
06/14/2012 11:11 PM

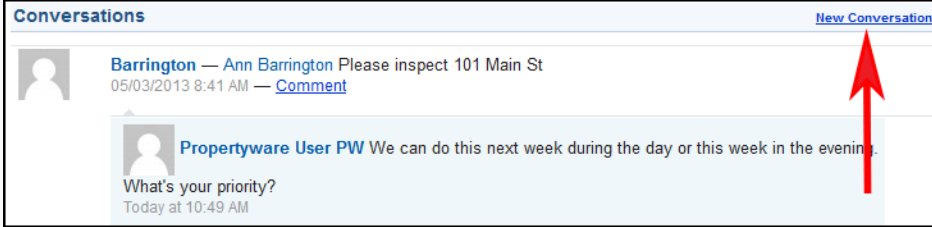
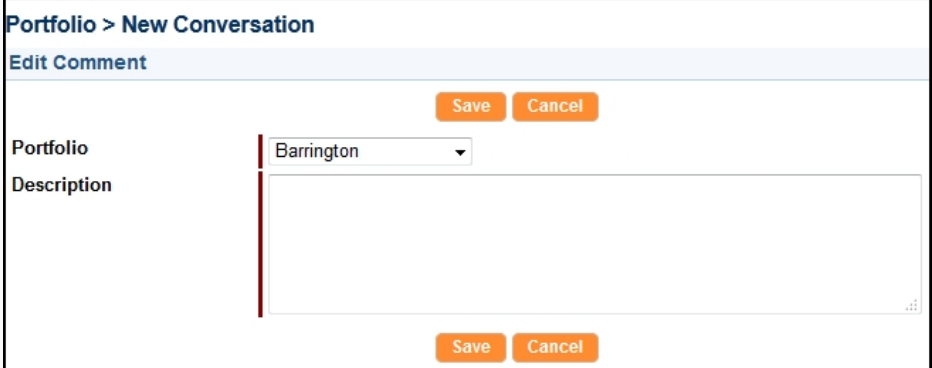
## Adding Comments to Conversations

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

Step	Action/Page
<p>Click the <b>Comment</b> link to add a comment to the conversation. If this is a conversation between the property manager and a tenant, the link is not active.</p>	
<p>Click the <b>Save</b> button to post your comment.</p>	

## Starting a Conversation

Any time a conversation is created or updated with a new comment, the participants are notified immediately by an e-mail message.

Step	Action/Page
<p>Click the <b>New Conversation</b> link.</p>	
<p>If you have multiple portfolios, select the appropriate one and enter your comment or question in the <b>Description</b> field.</p>	

Click the **Save** button to post your comment.









## Statements

Use the **Statements** tab is divided into three sections. At the top, you can view financial *Statements* for any portfolio and period you want. To the right, you'll see a quick *Balance Summary* for the same period. Below that, you'll see a full listing of *Draws and Contributions* that have been made to and from your portfolio. You can also make new contributions to your account from here, if you have set up a payment account.

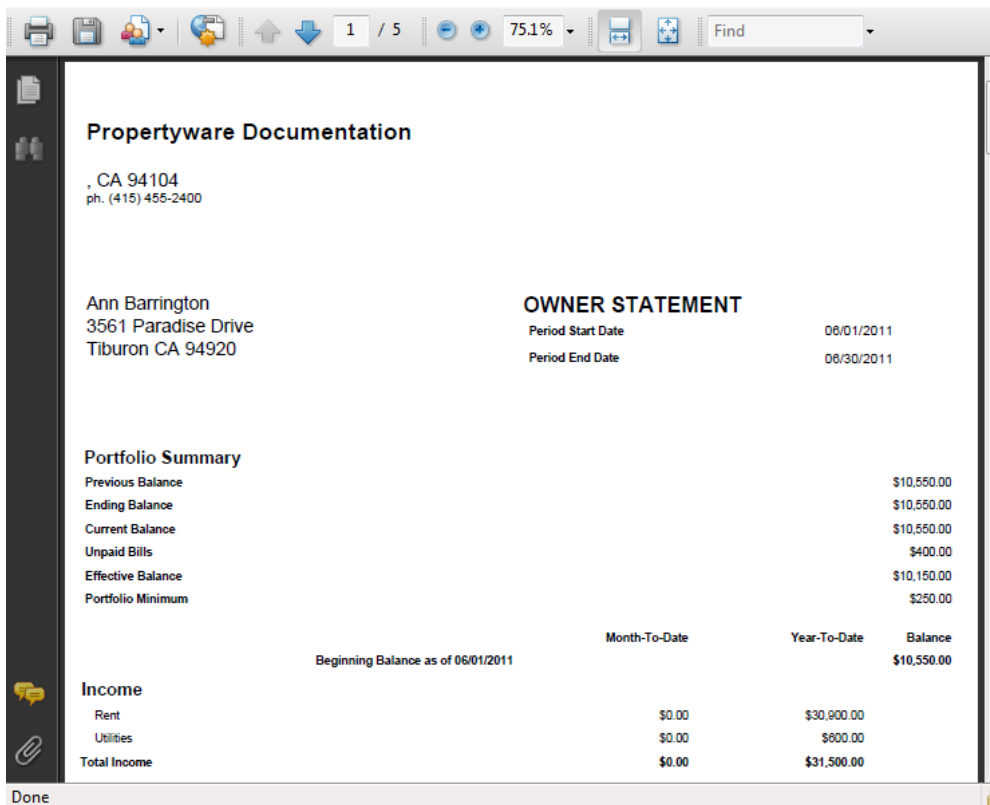
My Account	Statements	Reports	Bills	Maintenance	Documents
<b>Portfolio</b> BARRINGTON		<b>Period</b> Last Year			
Statements From: Last Year					<b>BARRINGTON</b> <b>Balance Summary</b> 01/01/2013 - 12/31/2013
<b>Portfolio</b>	<b>Statement Period</b>				\$12,301.46 <b>Prev. Balance</b>
BARRINGTON	07/16/2013 - 08/15/2013		<a href="#">Download</a>		<b>Current Period</b>
BARRINGTON	06/01/2013 - 06/30/2013		<a href="#">Download</a>		\$198,411.05 Income
BARRINGTON	04/01/2013 - 04/30/2013		<a href="#">Download</a>		\$-196,354.97 Expenses
BARRINGTON	03/01/2013 - 03/31/2013		<a href="#">Download</a>		\$30.00 Liabilities
BARRINGTON	02/01/2013 - 02/28/2013		<a href="#">Download</a>		\$14,403.54 Ending Balance
BARRINGTON	01/16/2013 - 02/15/2013		<a href="#">Download</a>		\$10,526.20 Mgmt Fee
BARRINGTON	01/16/2013 - 02/15/2013		<a href="#">Download</a>		<b>\$300.00 Portfolio Min.</b>
					<b>\$11,522.15 Available Balance</b>
					<a href="#">Make Contribution Online &gt;&gt;</a>
<small>* Available Balance = Ending Balance less Portfolio Minimum. This is an estimated balance summary. For the actual summary please refer to the published statements.</small>					
<b>Draws and Contributions</b>					
Portfolio	Date	Ref #	Type	Account	Amount
Barrington	08/13/2013		Check	Owner Draw	\$5,072.92
Barrington	08/13/2013		Check	Owner Draw	\$4,058.34
Barrington	05/15/2013		Check	Owner Draw	\$111.57
Barrington	05/09/2013		Check	Owner Draw	\$12,246.52
Barrington	05/08/2013	108	Check	Owner Draw	\$19,072.68
Barrington	05/08/2013	109	Check	Owner Draw	\$15,258.15
Brown	01/30/2013	1234636	Check	Owner Draw	\$13,287.60
Barrington	12/31/2012		-	-	-
Investco Group, LLC	12/31/2012		-	-	-
Barrington	12/12/2012		-	-	-
Barrington	11/26/2012	200	Payment		\$200.00
Barrington	10/31/2012	77	Check	Owner Draw	\$1,000.00
Barrington	03/29/2012	1	Check	Management Fees	\$15.00

## Viewing Owner Statements

To view your owner statement, click the **Download** link in the **Statements** list.

Statements From: Last Year			
Portfolio	Statement Period		
BARRINGTON	07/16/2013 - 08/15/2013	 <a href="#">Download</a>	 <a href="#">View Bills</a>
BARRINGTON	06/01/2013 - 06/30/2013	 <a href="#">Download</a>	 <a href="#">View Bills</a>
BARRINGTON	04/01/2013 - 04/30/2013	 <a href="#">Download</a>	 <a href="#">View Bills</a>

This opens the statement as a PDF document.



**Propertyware Documentation**

. CA 94104  
ph. (415) 455-2400

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

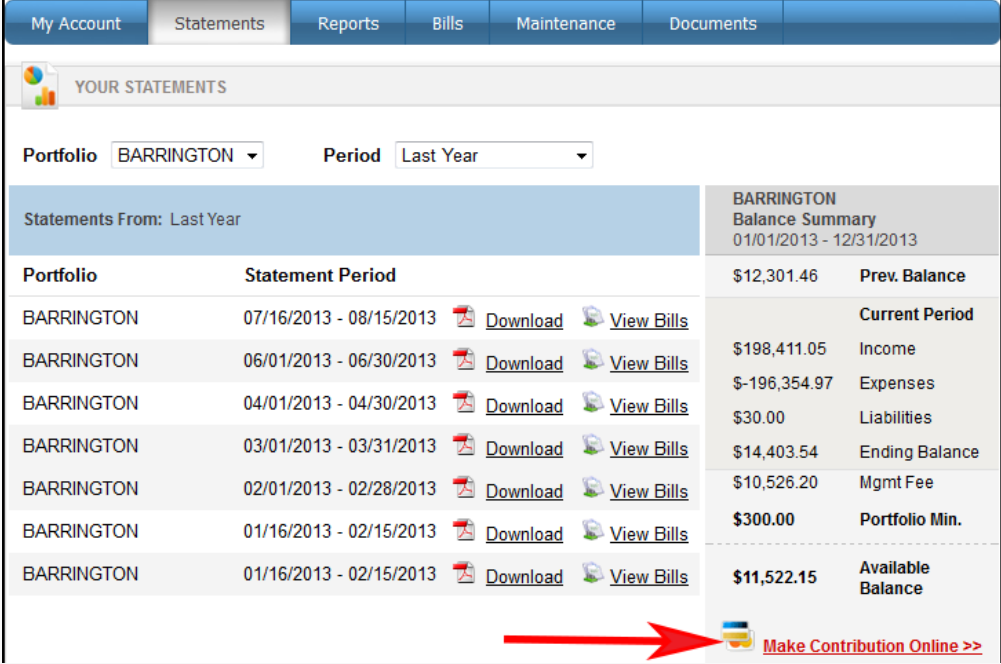
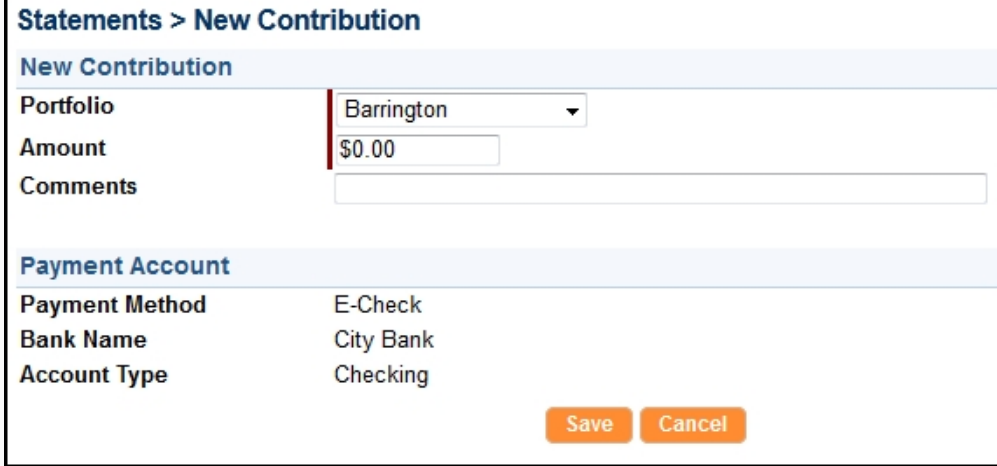

Beginning Balance as of 06/01/2011

	Month-To-Date	Year-To-Date	Balance
<b>Income</b>			
Rent	\$0.00	\$30,900.00	
Utilities	\$0.00	\$600.00	
<b>Total Income</b>	<b>\$0.00</b>	<b>\$31,500.00</b>	

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

## Making a Contribution

If you have set up an online payment account, you make contributions to the property management account online.

Step	Action/Page
<p>On the <b>Statements</b> page, click the <b>Make Contribution Online</b> link.</p>	 <p>The screenshot shows a navigation bar with tabs: My Account, Statements, Reports, Bills, Maintenance, Documents. Below is the 'YOUR STATEMENTS' section with filters for Portfolio (BARRINGTON) and Period (Last Year). A table lists statements from 07/16/2013 to 02/15/2013, each with 'Download' and 'View Bills' links. To the right is a 'BARRINGTON Balance Summary' table. At the bottom right, a red arrow points to a 'Make Contribution Online &gt;&gt;' link.</p>
<p>If you have multiple portfolios, enter the amount and any comments. Confirm that this is the correct payment account.</p>	 <p>The screenshot shows the 'Statements &gt; New Contribution' form. It has sections for 'New Contribution' with fields for Portfolio (Barrington), Amount (\$0.00), and Comments. Below is the 'Payment Account' section with fields for Payment Method (E-Check), Bank Name (City Bank), and Account Type (Checking). At the bottom are 'Save' and 'Cancel' buttons.</p>
<p>Click the <b>Save</b> button to post your contribution.</p>	 <p>A close-up of the 'Save' and 'Cancel' buttons. A mouse cursor is clicking the 'Save' button.</p>


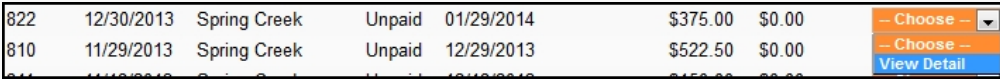
### Bills

Use the Bills tab to review 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). 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>									
Filter By: Bill Date <input type="button" value="Go"/> Paid/Unpaid: All <input type="button" value="Go"/>									
Bill #	Bill Date	Building	Unit	Status	Due Date	Payment Date	Amount	Amount Paid	Action
822	12/30/2013	Spring Creek		Unpaid	01/29/2014		\$375.00	\$0.00	-- Choose --
810	11/29/2013	Spring Creek		Unpaid	12/29/2013		\$522.50	\$0.00	-- Choose --
811	11/18/2013	Spring Creek		Unpaid	12/18/2013		\$150.00	\$0.00	-- Choose --
814	11/18/2013	343 Mullen Ave		Unpaid	11/18/2013		\$220.00	\$0.00	-- Choose --
815	11/18/2013			Unpaid	11/18/2013		\$13.20	\$0.00	-- Choose --
816	11/18/2013	Brook Green Apartments		Unpaid	11/18/2013		\$22.00	\$0.00	-- Choose --

### Viewing Your Bills

To view the list of all bills applied towards your account, follow these steps:

Step	Action/Page
<p>Select the bills you want to view:</p> <p><b>Filter</b> By billing date or payment date.</p> <p>Select the time period you want to view.</p> <p>Select paid, unpaid, or all bills.</p> <p>Click <b>Go</b>.</p>	
<p>Select the <b>View Detail</b> option from the <b>Action</b> drop-down list.</p>	

This step displays the bill, as shown below:

**Bills > Bill# 822** [View Invoice](#)

---

**Bill Detail**

Ref No.  
 Bill Date 12/30/2013  
 Due Date 01/29/2014  
 Terms NET 30  
 Description Emergency service - burst pipes

---

**Bill Splits**

Portfolio/Building	Unit	Account	Comments	Amount
BARRINGTON / SPRINGCK		PLUMBING - Plumbing		\$375.00
<b>Total</b>				<b>\$375.00</b>

---

**Payments**  
No Payments

---



**Documents**  
No Documents

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

<b>INVOICE</b>	<b>Bluecloud Management Company</b>	
Date: 12/30/2013	Phone (415) 555-8000 Fax (415) 455-2401	
Invoice #: 822		
<b>Bluecloud Management Company</b> Ann Barrington 3561 Paradise Drive Calgary AB 6AB59C (415) 650-8555	<b>JOB Spring Creek</b> 1920 Spring Creek Dallas TX 75080	
<b>Description</b>	<b>Account Code</b>	<b>Total</b>
Emergency service - burst pipes	PLUMBING	\$375.00
<b>Total Amount</b>		<b>\$375.00</b>

## Documents

Use the **Documents** tab to open or download documents shared by your management company. 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>Inspection Documents</b>					
<b>Documents</b>					
There are no Inspection documents available					
<b>Other Documents</b>					
<b>Documents</b>					
<u>File Name</u>	<u>Size</u>	<u>Uploaded</u>	<u>Uploaded by</u>		
 <a href="#">01251g02.jpg</a>	11k	1/27/2014	puserpw		