Tenant Portal

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PURPOSE

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

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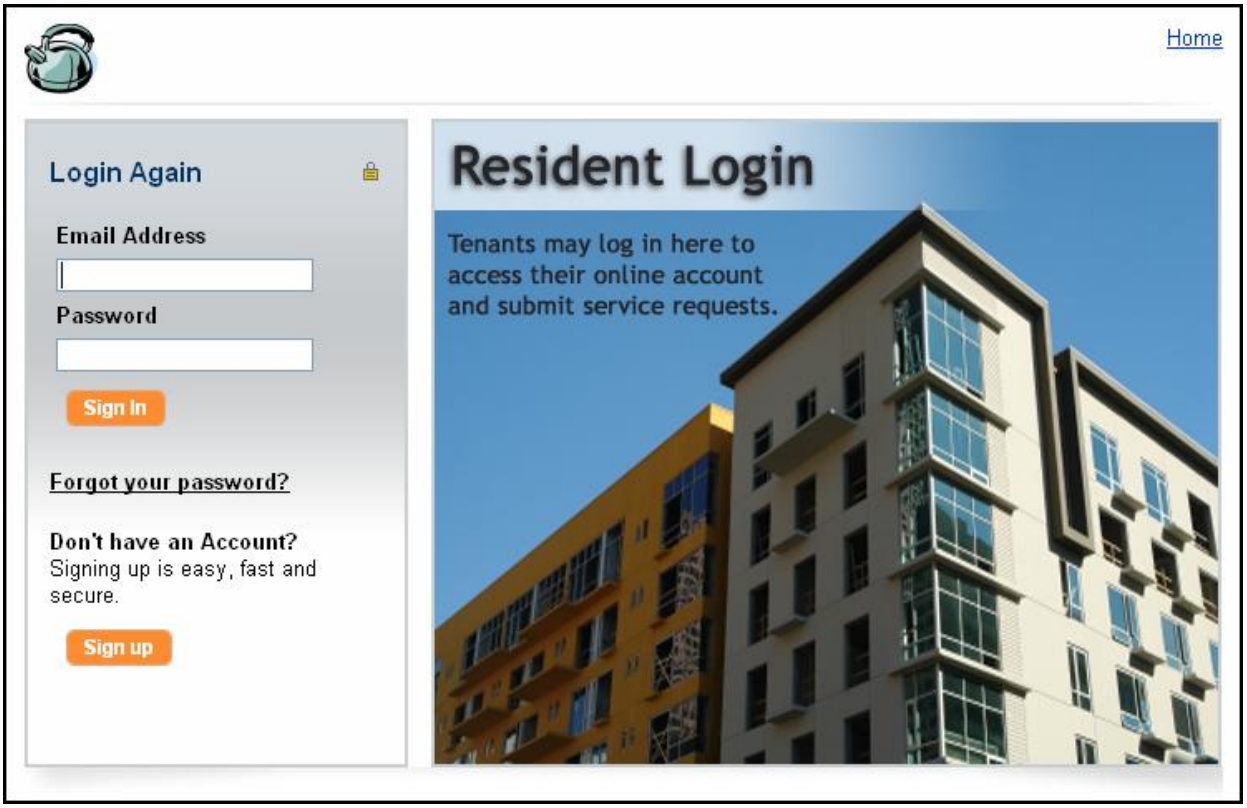
Accessing the Tenant Portal

The Tenant Portal allows real time access to lease information via the internet. You can review and edit contact information, create and manage services requests, view your ledger, give notice, and review documents shared by the owner/property management company.



An email will be sent to you from your management team. The email will include log-in instructions. If a your forget your password, the **Forgot your password?** link can be used to have a new password emailed. You will need to enter your First and Last name and your email address to generate a new password.

Navigating the Tenant Portal

The Tenant Portal is set up with four main navigation tabs across the top of every page. You can move between these tabs by clicking the tab title. The tab you are currently displaying will change to white.

- **My Account** – Provides an overview of your profile including contact information, open service requests and conversations.
- **My Rentals** – Provides lease details for rentals.
- **Maintenance** – Provides a chronological listing of all maintenance requests regardless of status.
- **Documents** – Provides links to shared building, lease and other documents.

There is also additional navigation links located in the upper right hand corner of the Tenant Portal.

- **Home** – directs you to the management teams homepage.
- **Help** – directs you to the help pages for the Tenant Portal. The help pages can be used to locate instructions on how/why to perform certain tasks in the Tenant Portal.
- **Logout** – Closes the session in the portal. Clicking Logout at the end of every session will help to maintain the security of your account.

My Account

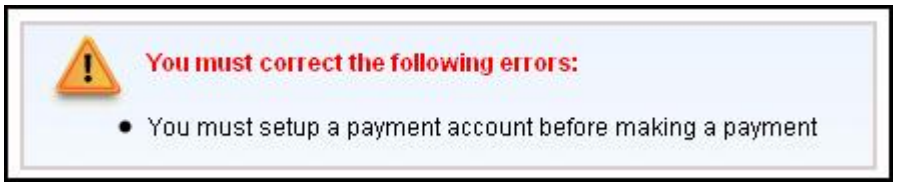
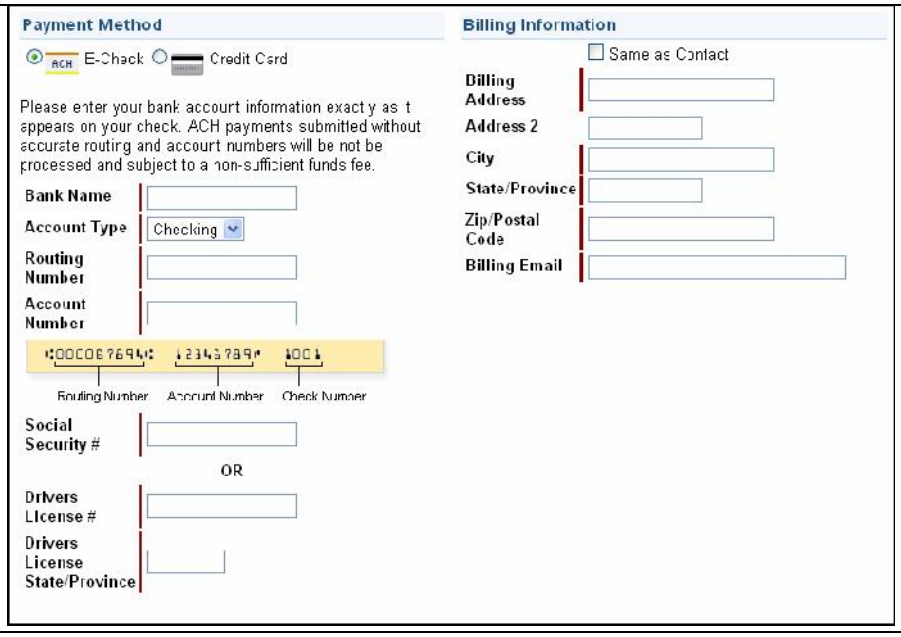
The My Account tab allows you to perform the following tasks:

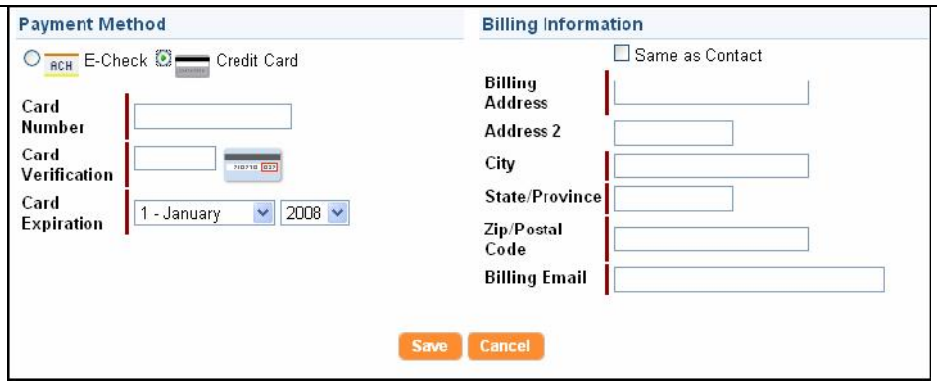
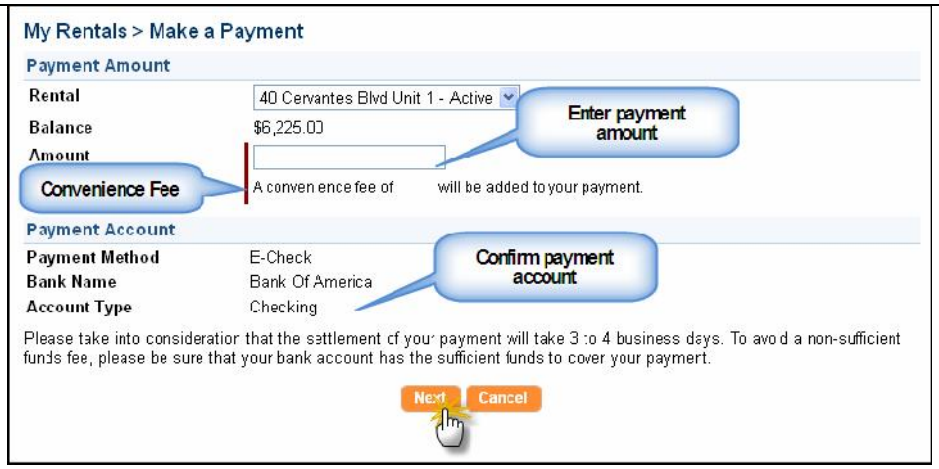
1. **Action buttons:** Make Payment, New Service Request, and Auto Payment. Make Payment and Auto Payment will only be available if the management team has opted to offer electronic payments.
2. **Community Message:** This message will not always appear. These will appear when the management team posts a new message.
3. **My Contact Information:** View and edit contact information.
4. **My Rentals:** Provides a snapshot of your lease information.
5. **My Open Service Requests:** Review, cancel and edit existing service requests.
6. **Conversations:** Converse with your management team.

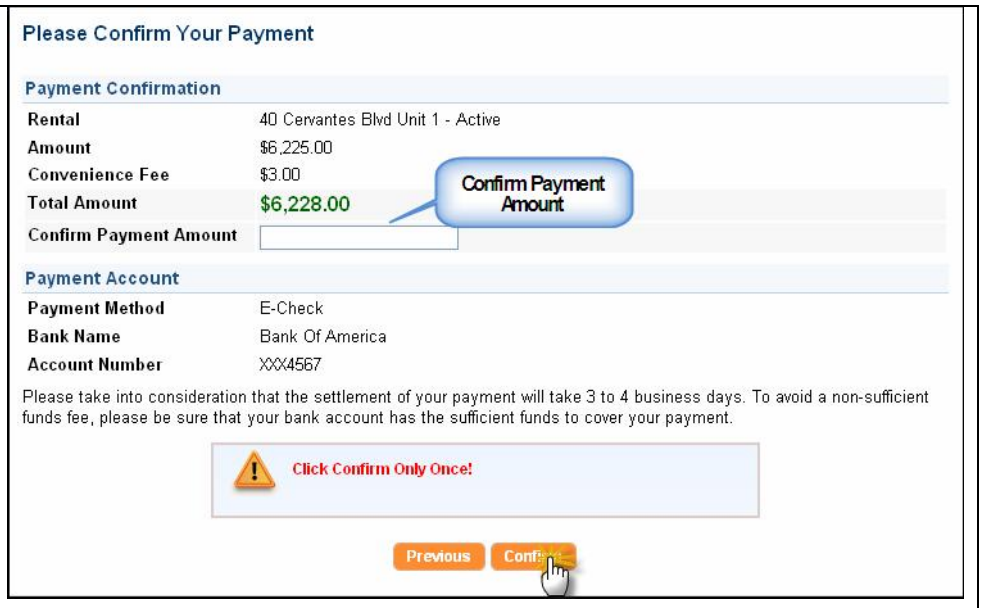
Making a One Time Payment

If electronic payments have been activated by the management team, you can click the **Make Payment** button to initiate a one- time payment. The first time you attempt to make an electronic payment, you will need to set up your payment information. The Tenant Portal can be set to accept

Automatic Checking (ACH or E-Check) payments and/or credit card payments. This will depend upon how the management team has set up the electronic payment options for the lease.

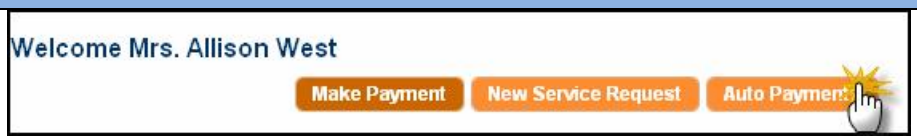
Step	Action/Screen
From the My Account or My Rentals tab, click the **Make Payment** button.	 If this is the first time you are attempting an electronic payment, an error will display advising you to setup a payment account. 
Depending on the options available, you may need to select which type of payment they want to use: E-Check or Credit Card.	 **Note:** You can store both credit card and E-Check information. The selected radio button determines which payment method the system will use as the default payment method.
If E-Check is selected, you will need to complete all fields. You can choose to enter either your driver's license information or your social security for verification purposes.	

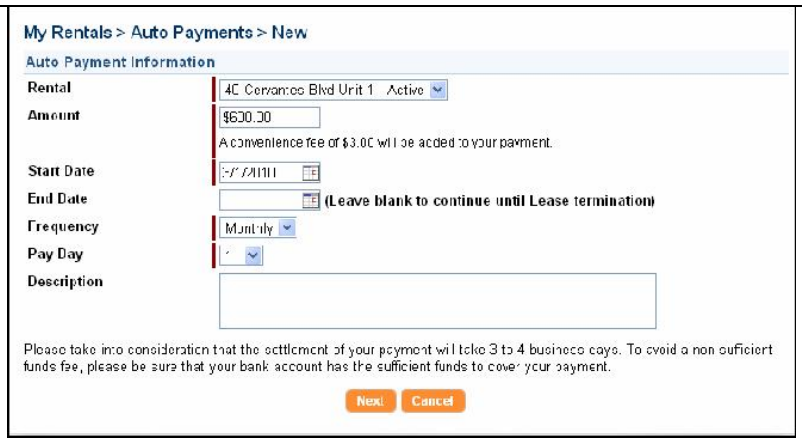
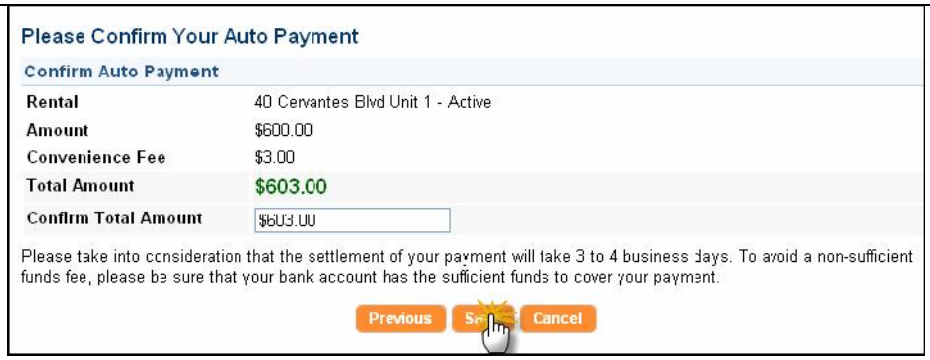
	Important: The system will verify that the routing number is an active routing number. You should double-check the account number to make sure you entered the correct information. Failure to enter the correct information could result in a returned check.
If Credit Card is selected, you will need to complete all of the fields.	
Click the **Save** button.	
You will be redirected to the My Rentals tab >Make Payment screen. Enter the payment amount and click the **Next** button.	 **Note:** You should also note the conveneince fee associated with ePayment and confirm the payment account. The transaction may take 1-4 business days depending on the transaction type. If the you have already set up your ePayment accounts, clicking the Make Payment button will direct you to the Make Payment screen.

You will need to confirm the payment amount and click the **Confirm** button to process the payment.	 **Note:** To change the payment amount, click the Previous button. **Important:** To prevent duplicate billing, be sure to click the Confirm button only once.

Setting up Auto Payments

Auto Payments allow you to set up an automatic monthly debit from your credit card or checking account. You can choose a start date for the recurring payment and cancel the auto-payment at any time.

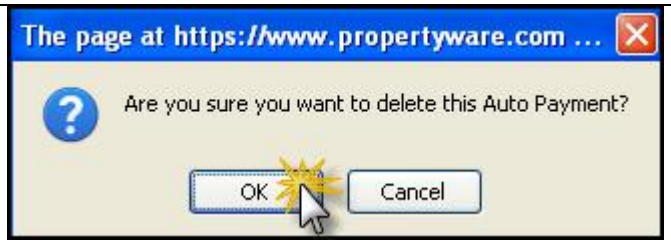
Step	Action/Screen
From the My Account tab, click the **Make Payment** button.	
Click the **Schedule Auto Payment** button.	

Complete all required fields.	 **Note:** The convenience fee will be displayed under the Amount field.
Confirm the total amount to be paid each month and click the **Save** button.	
You will be directed to the My Rentals tab > Auto Payments screen, confirming the payment has been set for recurring.	

Deleting Auto Payments

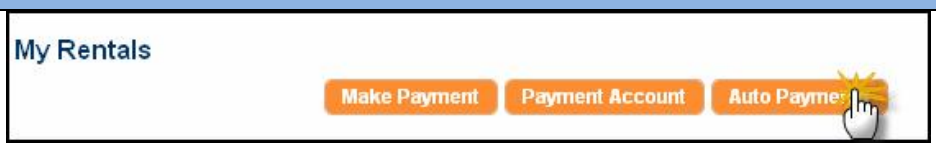
You can choose to delete your auto-payments at any time.

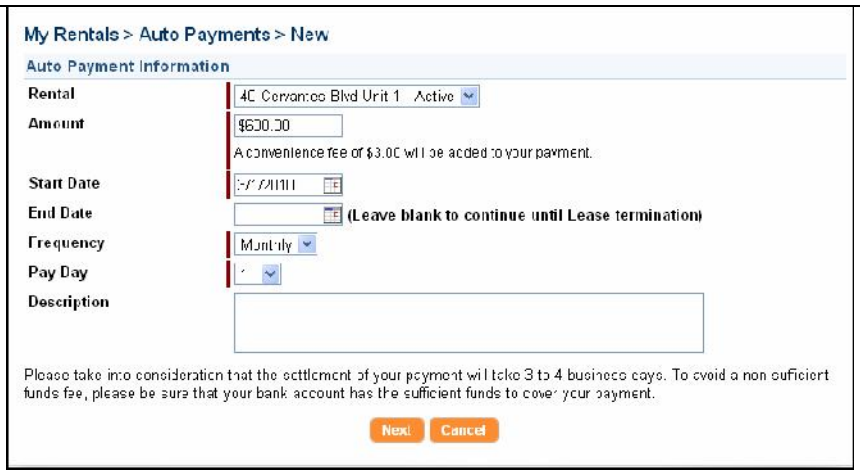
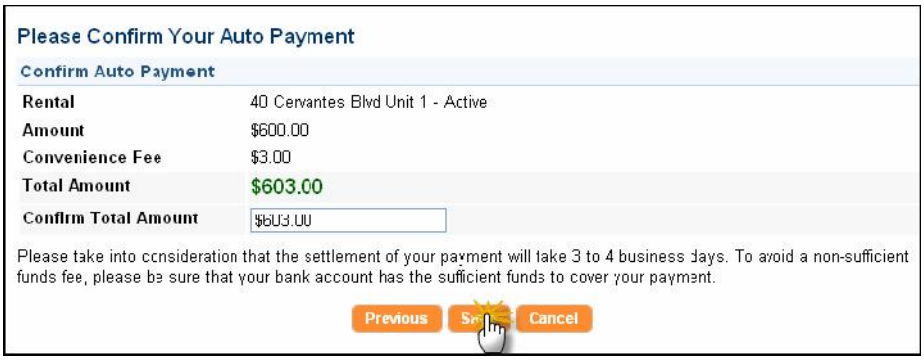
Step	Action/Screen

From the My Rentals or My Account tab, click the **Auto Payments** button.	
Click **Delete** from the Action dropdown.	 **Note:** Payments can be deleted by selecting the **View Detail** option from the Action dropdown and clicking the **Delete** button on the Details screen.
Click **OK** on the confirmation window.	

Editing Auto Payments

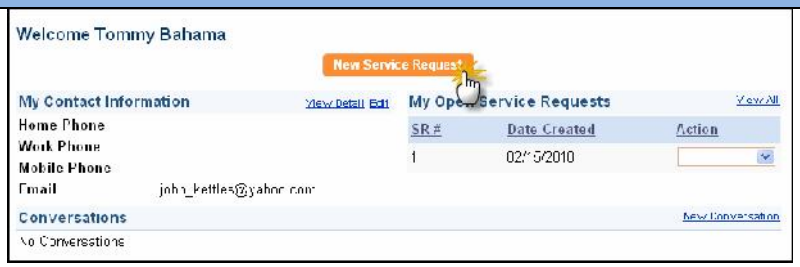
You can edit your auto-payments at any time.

Step	Action/Screen
From the My Rentals or My Account tab, click the **Auto Payments** button.	
Click **Edit** from the Action dropdown.	

Edit the details.	
Confirm the total amount to be paid each month and click the **Save** button.	

Creating a New Service Request

Creating a service request is an easy way to inform the management team that maintenance is required. You can use this feature to report a maintenance request, choose a time for the repairs, and attach any documents that may be relevant to the process.

Step	Action/Screen
From the My Account tab, click the **New Service Request** button.	 **Note:** You will be directed to the Maintenance tab to complete the

	request.
Fill in all the relevant fields. Preferred time to enter and Description are required fields.	 • Specific location – apartment/office number. • Description – Describe the issue. • Preferred time to enter – Defaults to Anytime. You can also select a specific date and time. • Attach Document – Allows you to browse your computer for relevant files.
Click the **Save** button.	 The management company will be notified via email that a service request has been saved.

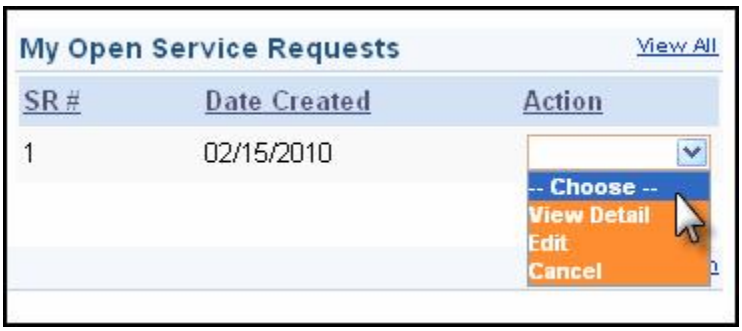
Important

If a required field is left blank, an error message will display. You will need to correct the errors and click **Save** again.

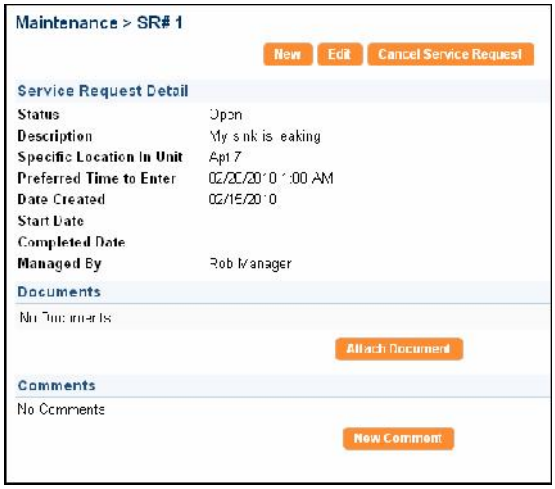
Review, Cancel and Edit Existing Service Requests

You will be able to view all of your requests in the My Account tab. Links to review, cancel and edit the existing service requests will also be available. The My Open Service Requests portion of the My

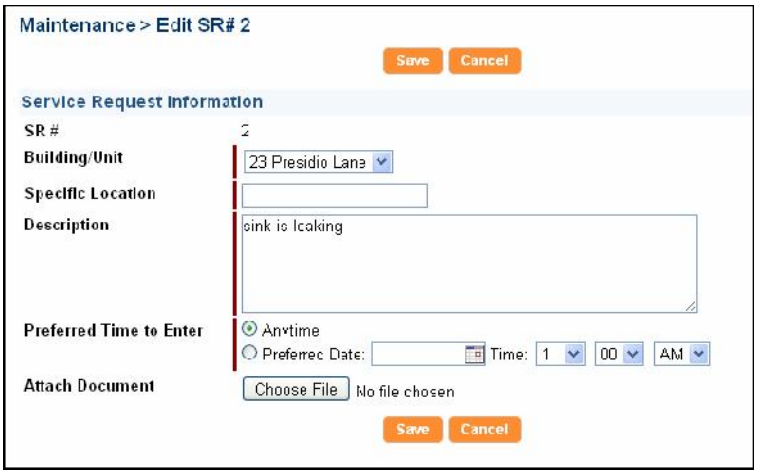
Account tab will display the SR # (service request number), the date the request was created and provides an "Action" dropdown you can review, edit or cancel the transaction.



The **View Detail** action will direct you to the Maintenance tab so you can review the specifics of the service request.



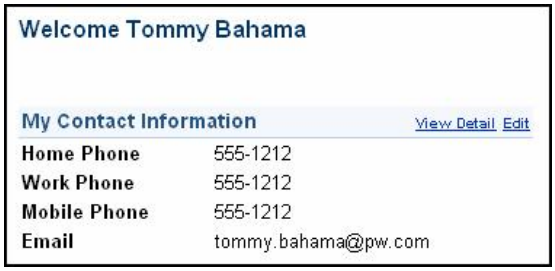
The **Edit** action will direct you to the Maintenance tab and allow you to edit all of the fields in the request.



The **Cancel** action will direct you to the Maintenance tab and cancel the request.

Viewing Contact Information

You can view your contact information directly from the My Account tab.
The Portal displays home, work and mobile phones as well as the email address that is on file.



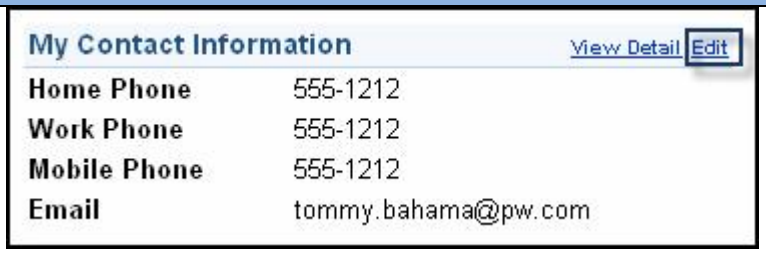
You can view all of your contact information by clicking the **View Detail** link.

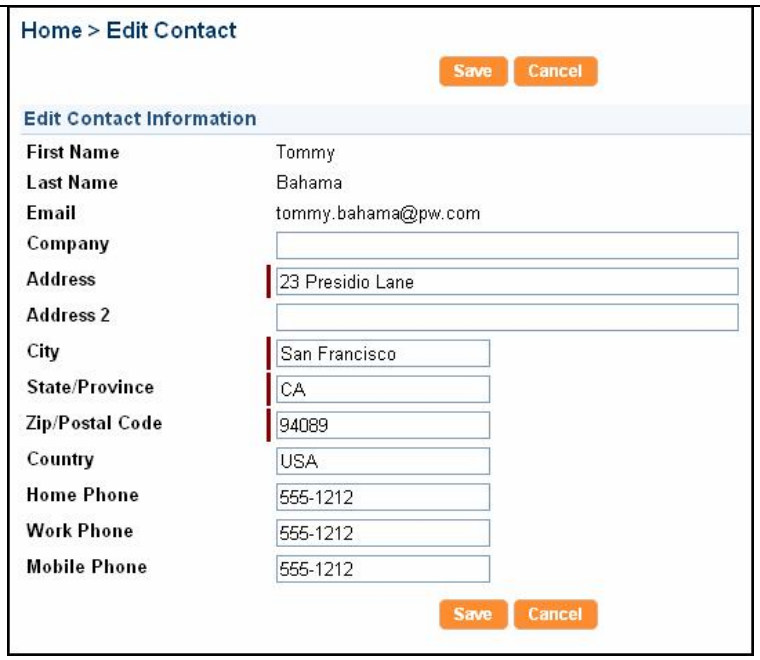
The following information is displayed:

- First name
- Last name
- Email
- Company
- Address
- Home Phone
- Work Phone
- Mobile Phone

Editing Contact Information

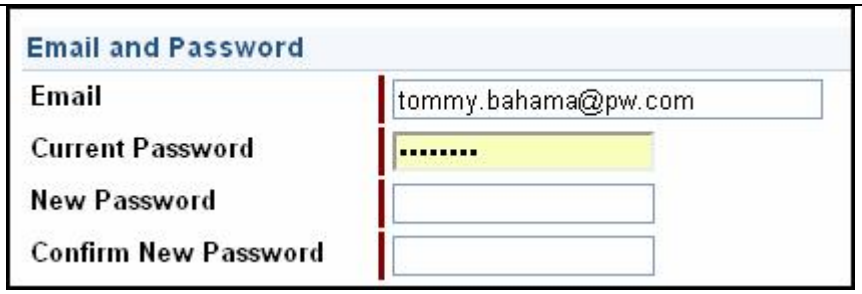
You can edit all of your contact information, including the password, from the My Account tab.

Step	Action/Screen
From the My Account tab, click the **Edit** link.	

Update the relevant fields.	 **Note:** The name cannot be changed. The email address can be changed but not from this view.
Click the **Save** button.	

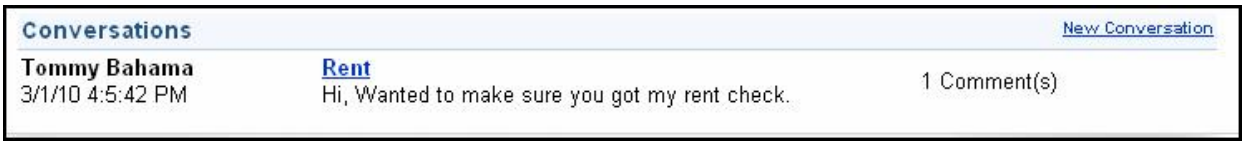
Editing Email Address and Password

You can edit the email address associated with your lease and the password associated with the Tenant Portal from the My Account tab.

Step	Action/Screen
Click the View Detail link.	
Click the **Change Email and Password** button.	
Update the Email Address and Password.	 **Note:** The current password will automatically be entered in the appropriate field.
Click the **Save** button.	

Conversing with the Management Team

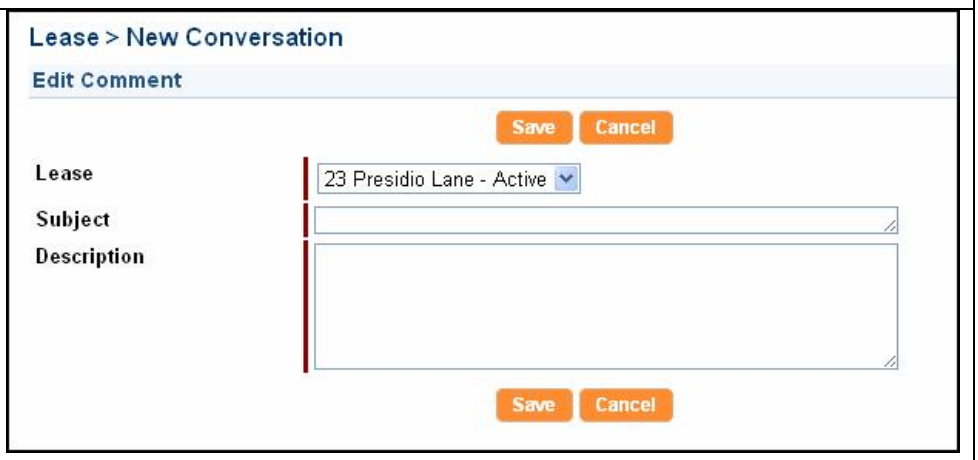
Conversations can be initiated by you or by your Management Team. All conversations will be displayed at the bottom of the My Accounts tab.



Both you and the management team will be notified via email if the other has initiated a conversation. Conversations can be used to ask basic questions that fall outside the scope of a maintenance request. It provides you an easy way to converse with your management team.

Starting New Conversations

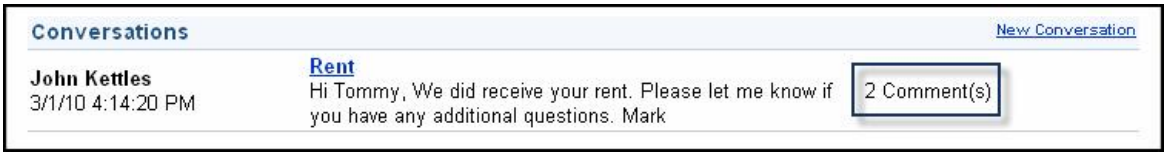
Both you and your management team can start a new conversation. You can start a conversation form the My Accounts tab.

Step	Action/Screen
Click the **New Conversation** link	
Complete all relevant fields.	 The lease will automatically display. If the tenant has more than one lease, they can select the lease in question from the dropdown.

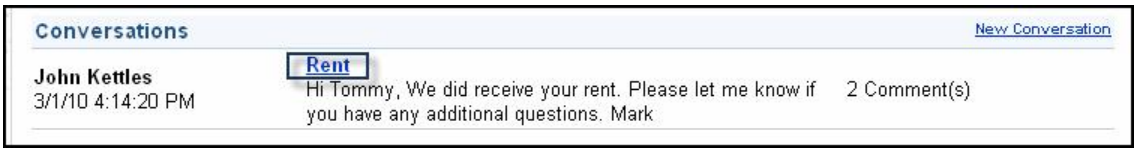
Click the **Save** button.	

Continuing Existing Conversations

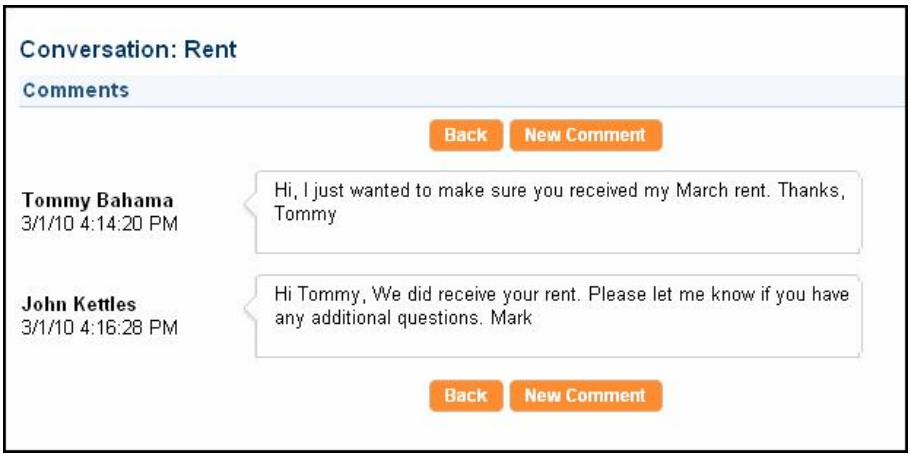
All existing conversations will appear in the Conversations section of the My Accounts tab. Each time a comment is added, the recipient will be notified via email. From the Tenant Portal, you view how many comments are on the Conversation.



Clicking the [Subject] link will launch the list of comments for review.



The comments will be listed in chronological order, starting with the original comment on top.



Clicking the **New Comment** button allows you to reply or add additional details.

My Rentals

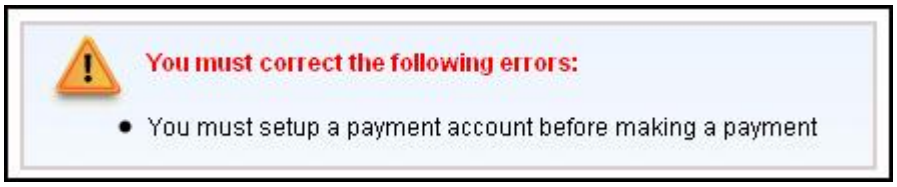
The My Rentals tab allows you to review the details of your lease(s). Each lease will be displayed with the following details:

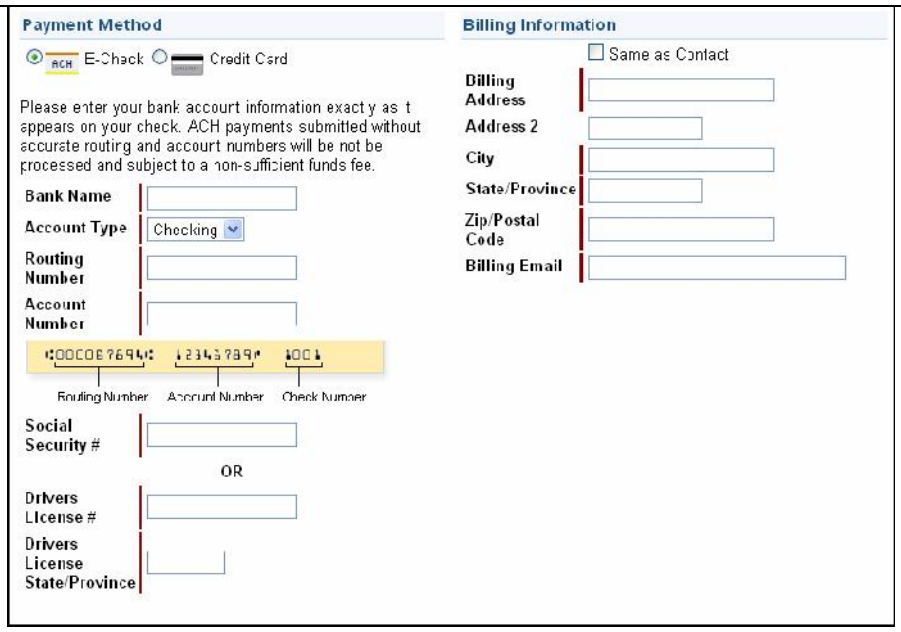
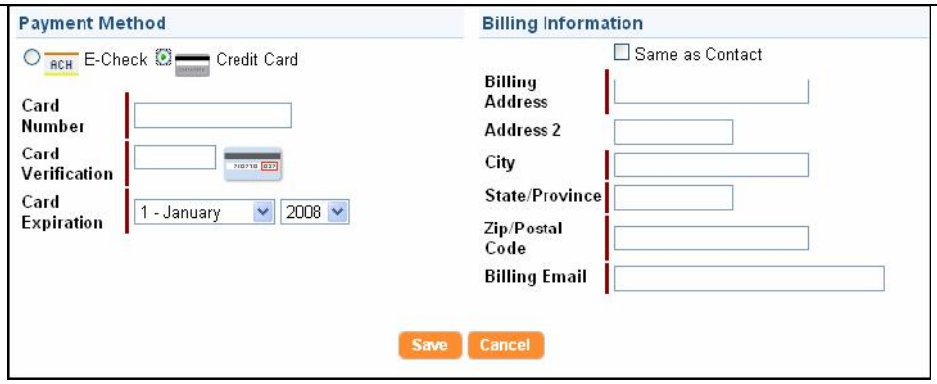
- Address
- Unit (if applicable)
- Last Payment Date
- Deposit Held
- Total Unpaid
- Balance
- Action dropdown

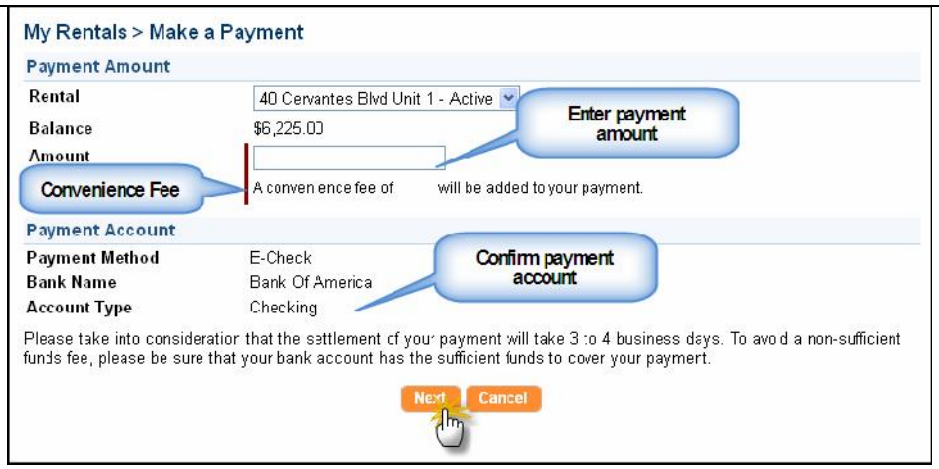
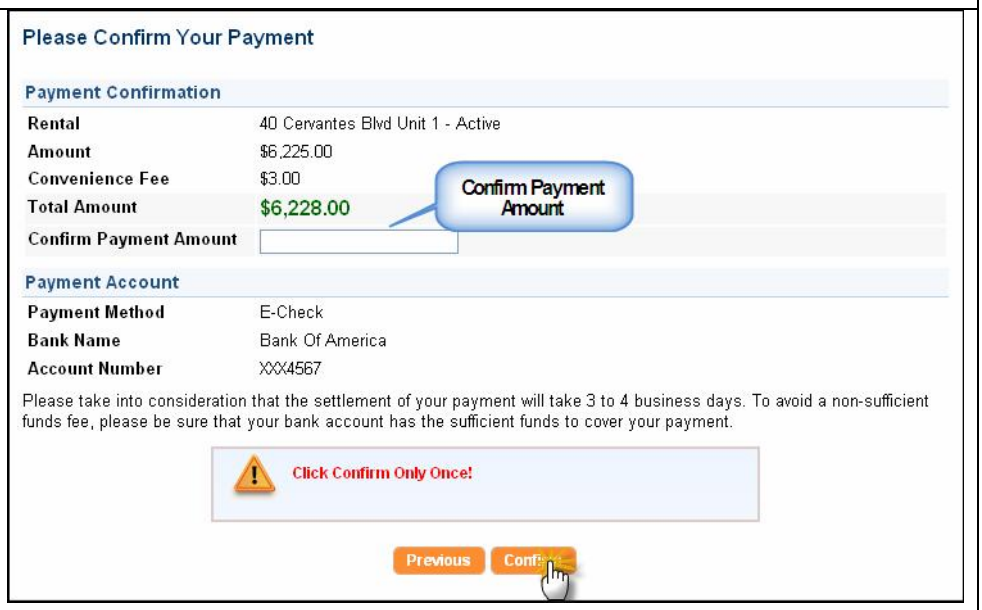
If the management team has enabled ePayments, you can also manage ePayments from the My Rentals tab.

Making a One Time Payment

If electronic payments have been activated by the management team, you can click the Make Payment button to initiate a one- time payment. The first time you attempt to make an electronic payment, you will need to set up your payment information. The Tenant Portal can be set to accept Automatic Checking (ACH) payments and/or credit card payments. This will depend upon how the management team has set up the electronic payment options for your lease.

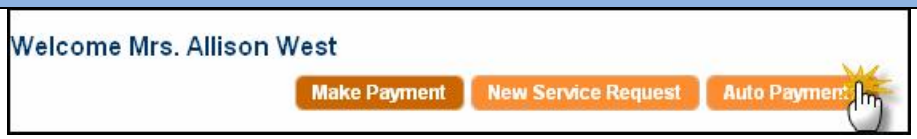
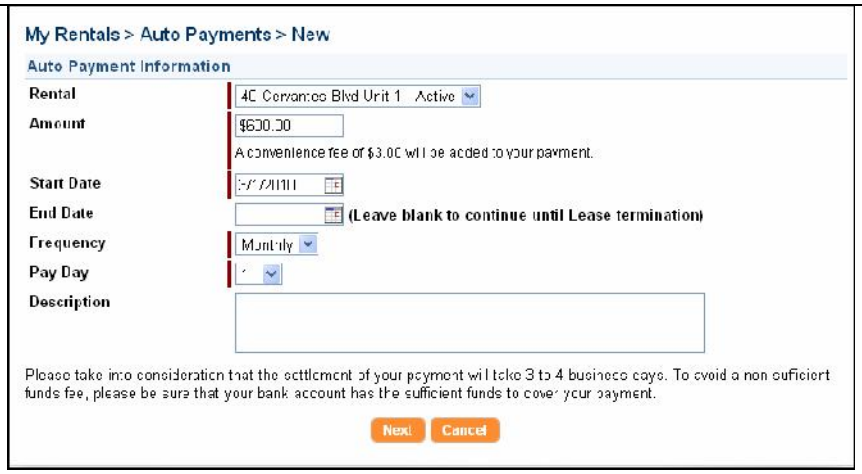
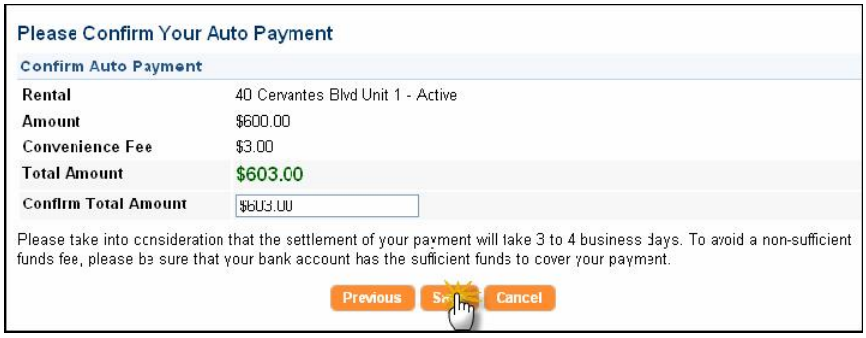
Step	Action/Screen
From the My Rentals or My Account tab, click the **Make Payment** button.	 If this is the first time you are attempting an electronic payment, an error will display advising you to setup a payment account. 
Depending on the options available, you may need to select which type of payment you want to use: E-Check or Credit Card.	 **Note:** You can store both credit card and E-Check information. The selected radio button determines which payment method the system will use as the default payment method.

If E-Check is selected, you will need to complete all fields. You can choose to enter either your driver's license information or your social security for verification purposes.	 **Important:** The system will verify that the routing number is an active routing number. You should double-check the account number to make sure you have entered the correct information. Failure to enter the correct information could result in a returned check.
If Credit Card is selected, you will need to complete all of the fields.	
Click the **Save** button.	

You will be redirected to the My Rentals tab >Make Payment screen. Enter the payment amount and click the **Next** button.	 **Note:** You should also note the conveneince fee associated with ePayments and confirm the payment account. The transaction may take 1-4 business days depending on the transaction type. If you have already set up your ePayment accounts, clicking the Make Payment button will direct you to the Make Payment screen.
You will need to confirm the payment amount and click the **Confirm** button to process the payment.	 **Note:** To change the payment amount, click the Previous button. **Important:** To prevent duplicate billing, be sure to click Confirm only once.

Setting up Auto Payments

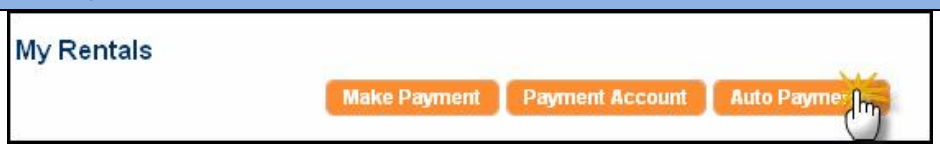
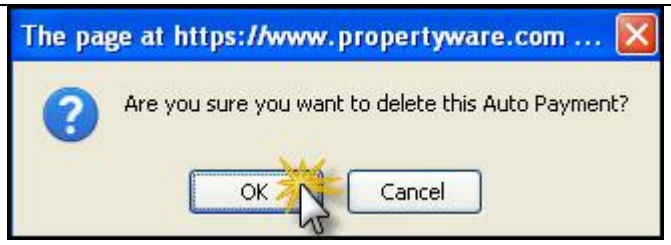
Auto Payments allow you to set up an automatic monthly debit from your credit card or checking account. You can choose a start date for the recurring payment and cancel the auto-payment at any time.

Step	Action/Screen
From the My Rentals tab, click the **Make Payment** button.	
Click the **Schedule Auto Payment** button.	
Complete all required fields.	 **Note:** The convenience fee will be displayed under the Amount field.
Confirm the total amount to be paid each month and click the **Save** button.	

You will be directed to the My Rentals tab > Auto Payments screen, confirming the payment has been set for recurring.	

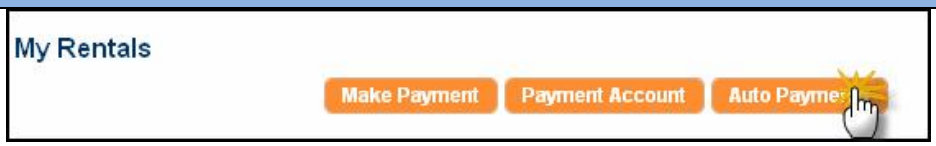
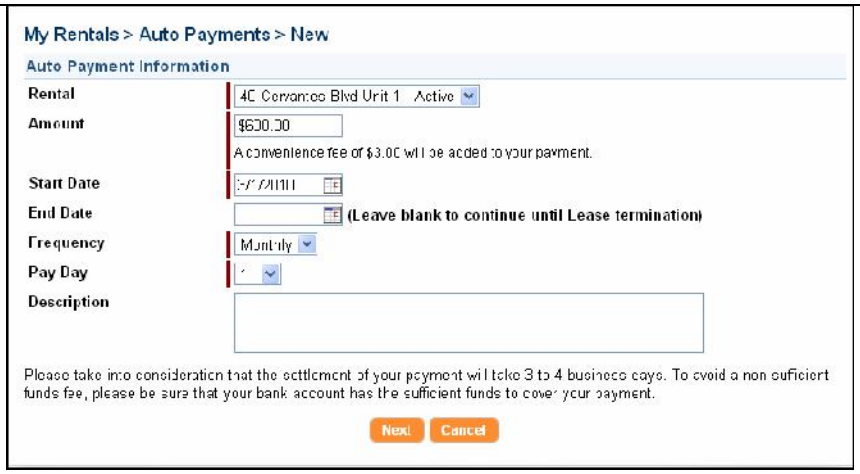
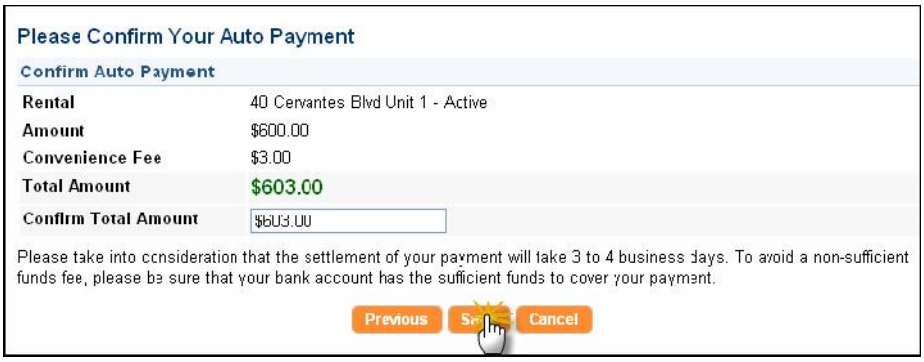
Deleting Auto Payments

You can choose to delete your auto-payments at any time.

Step	Action/Screen
From the My Rentals or My Account tab, click the **Auto Payments** button.	
Click **Delete** from the Action dropdown.	 **Note:** Payments can be deleted by selecting the **View Detail** option from the Action dropdown and clicking the **Delete** button on the Details screen.
Click **OK** on the confirmation window.	

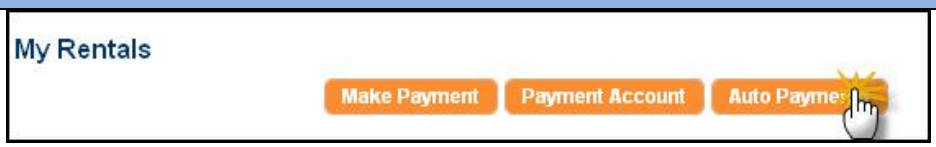
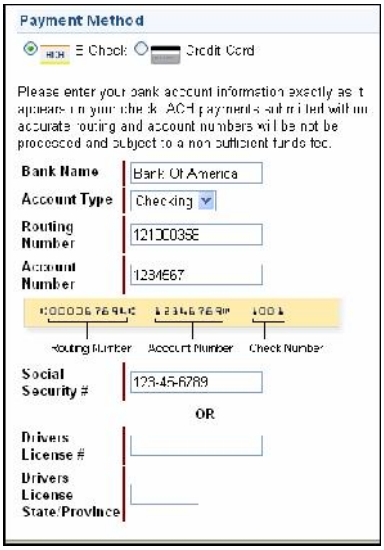
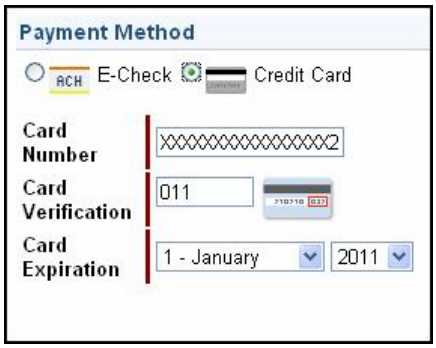
Editing Auto Payments

You can choose to edit your auto-payments at any time.

Step	Action/Screen
From the My Rentals or My Account tab, click the **Auto Payments** button.	
Click **Edit** from the Action dropdown.	
Edit the details.	
Confirm the total amount to be paid each month and click the **Save** button.	

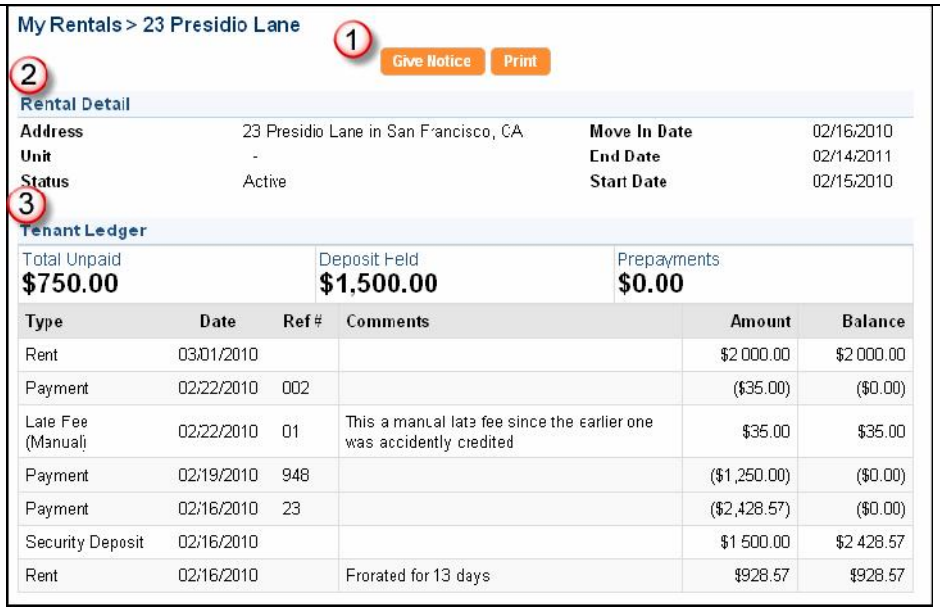
Editing Payment Accounts

You can edit the account/credit card they are using for payments, or you can choose to change your default payment option.

Step	Action/Screen
From the My Rentals click the **Payment Account** button.	
Click the **Edit Payment Account** button.	
Select the radio button for the payment to be edited.	 **Note:** The radio button that is saved on this page will drive the default payment account. All payments will be drawn from that account moving forward.
Edit the account details.	**E-Check**  **Credit Card** 

Viewing Lease Details

The Action dropdown will allow you to see the details of your lease.

Step	Action/Screen
Select **View Details** from Action dropdown.	
You can review/edit your lease details.	 1. The Give Notice button allows you to give notice that you will be moving out. Selecting this option allows you to give notice in real time. The Print button allows you to print a paper copy of your ledger. 2. Rental Details include the address, status, move in, and lease start and end dates. 3. The ledger is not always available but may include the details of payments and adjustments on the lease, including deposits.

Giving Notice

The Give Notice button allows you to notify your management that you will be moving out. This feature automatically notifies the management team that you gave notice.

Step	Action/Screen
Select **View Details** from Action dropdown.	
Click the **Give Notice** button.	
Complete all relevant fields.	

Click the **Save** button.	 **Note:** The management team will automatically be notified that you gave notice.

Maintenance

The Maintenance tab allows you to view both open and closed service requests and edit any current requests. The requests will be listed in chronological order with the most recent requests at the top of the page.

The status field will display open, closed or cancelled requests. If you need more details, selecting **View Details** from the Action dropdown will display the request details. The Edit button will be available in the dropdown for requests in an "Open" status.

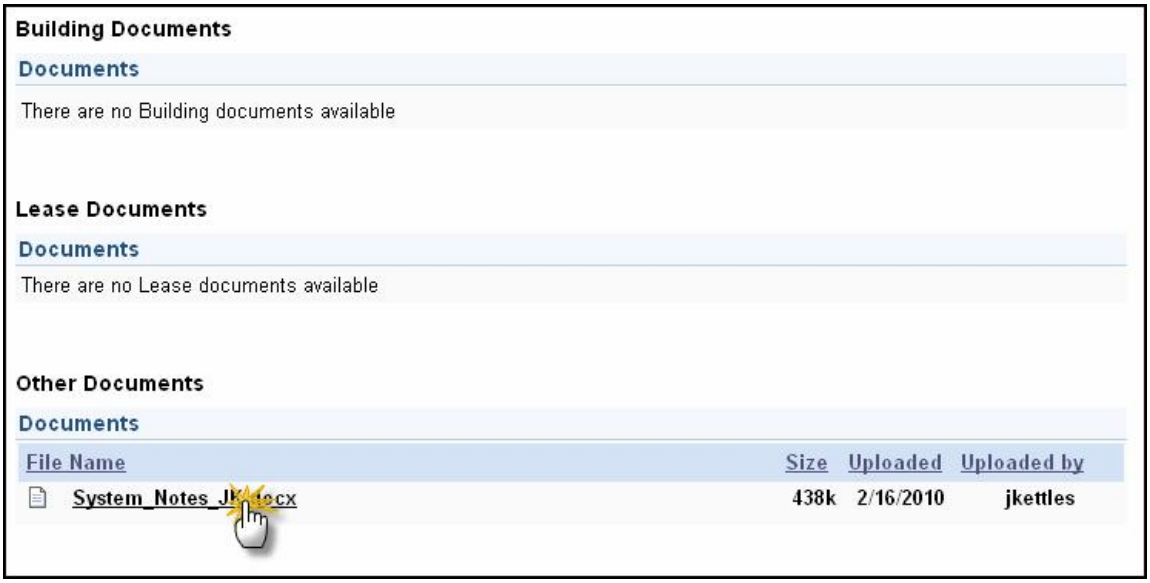
If it is an open request, the **Edit** and **Cancel Service Request** buttons will be available. All requests will have the **New** button, to create a new request, and the **Attach Document** and **New Comment** buttons.

Clicking the **Attach Document** button will allow you to browse your computer for a document and attach it to the service request.

Clicking the **New Comment** will allow you to add a comment to the request that is visible to both you and your management team as a conversation.

Documents

The Documents tab allows you to view building, lease or other important documents that have been shared by your management team.
When a new document is loaded to the Tenant Portal, you will be notified via email. When you view the document tab, you will see a link to the document along with size, date uploaded, and who uploaded the document. Clicking the link to the document will attempt to open the document.



Important

You must have the appropriate software to open the document.