

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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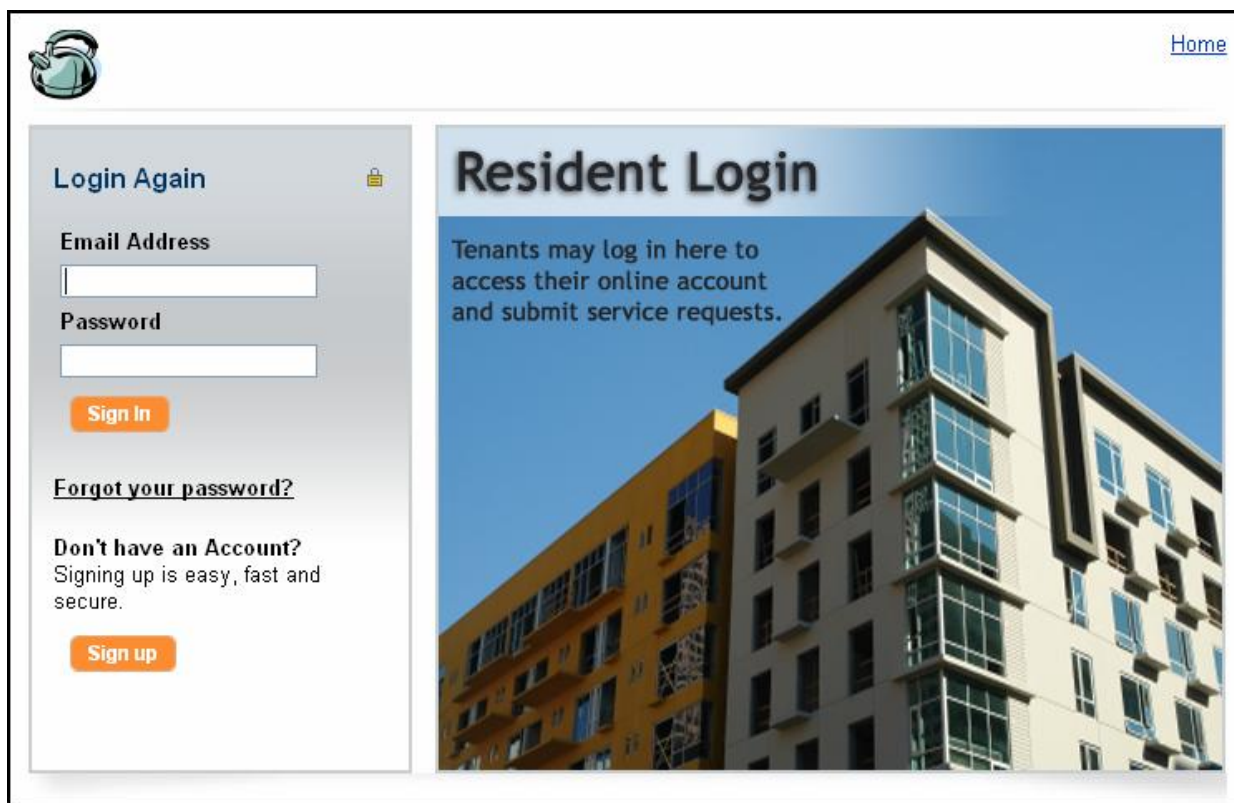
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Accessing the Tenant Portal

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.

A screenshot of the "Resident Login" page. The page has a light blue header with a "Home" link in the top right. On the left, there is a "Login Again" section with a lock icon, containing fields for "Email Address" and "Password", a "Sign In" button, and links for "Forgot your password?" and "Don't have an Account?". The right side features a large image of a modern apartment building with the text "Resident Login" and "Tenants may log in here to access their online account and submit service requests." in white text over the image.

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.

A screenshot of the "Forgot Password" form. The form has a light blue header with the text "Forgot Password" and "Request a new password". Below this, there are three input fields labeled "First Name", "Last Name", and "Email". At the bottom, there are two orange buttons: "Submit" and "Cancel".



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.

Welcome Mrs. Allison West

[Make Payment](#)
[New Service Request](#)
[Auto Payments](#)

Community Message

The management office will be closed this Friday. If you have an emergency, please dial 415-555-1212.

My Rentals

Address	Unit	Last Payment Date	Deposit Held	Total Unpaid	Balance	Action
40 Cervantes Blvd Unit 1	Unit 1	12/16/2009	\$2,000.00	\$6,225.00	\$6,225.00	-- Choose --

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

Home Phone (415) 555-9940

Work Phone (415) 885-5550

Mobile Phone (415) 645-3289

Email a.west@pw.com

My Open Service Requests [View All](#)

SR #	Date Created	Action
3	12/14/2009	-- Choose --

Conversations [New Conversation](#)

Mrs. Allison West
12/14/09 3:20:37 PM

[Work Order #3](#)
It looks like the ants are coming from the storage shed outside.

1 Comment(s)


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.	<p>Welcome Mrs. Allison West</p> <p> Make Payment New Service Request Auto Payments </p> <p>If this is the first time you are attempting an electronic payment, an error will display advising you to setup a payment account.</p> <div> <p>You must correct the following errors:</p> <ul style="list-style-type: none"> You must setup a payment account before making a payment </div>
Depending on the options available, you may need to select which type of payment they want to use: E-Check or Credit Card.	<p>Payment Method</p> <p> <input checked="" type="radio"/> ACH E-Check <input type="radio"/> Credit Card </p> <p>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.</p>
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.	<div> <div> <p>Payment Method</p> <p> <input checked="" type="radio"/> ACH E-Check <input type="radio"/> Credit Card </p> <p>Please enter your bank account information exactly as it appears on your check. ACH payments submitted without accurate routing and account numbers will be not be processed and subject to a non-sufficient funds fee.</p> <p> Bank Name <input type="text"/> Account Type <input type="text" value="Checking"/> Routing Number <input type="text"/> Account Number <input type="text"/> </p> <p> </p> <p> Social Security # <input type="text"/> OR Drivers License # <input type="text"/> Drivers License State/Province <input type="text"/> </p> </div> <div> <p>Billing Information</p> <p><input type="checkbox"/> Same as Contact</p> <p> Billing Address <input type="text"/> Address 2 <input type="text"/> City <input type="text"/> State/Province <input type="text"/> Zip/Postal Code <input type="text"/> Billing Email <input type="text"/> </p> </div> </div>

	<p>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.</p>
<p>If Credit Card is selected, you will need to complete all of the fields.</p>	<div> <div> Payment Method <input type="radio"/> E-Check <input checked="" type="radio"/> Credit Card </div> <div> Card Number <input type="text"/> Card Verification <input type="text"/> Card Expiration 1 - January 2008 </div> <div> Billing Information <input type="checkbox"/> Same as Contact Billing Address <input type="text"/> Address 2 <input type="text"/> City <input type="text"/> State/Province <input type="text"/> Zip/Postal Code <input type="text"/> Billing Email <input type="text"/> <input type="button" value="Save"/> <input type="button" value="Cancel"/> </div> </div>
<p>Click the Save button.</p>	
<p>You will be redirected to the My Rentals tab > Make Payment screen. Enter the payment amount and click the Next button.</p>	<div> <div> My Rentals > Make a Payment Payment Amount Rental 40 Cervantes Blvd Unit 1 - Active Balance \$6,225.00 Amount <input type="text"/> Convenience Fee A convenience fee of will be added to your payment. Payment Account Payment Method E-Check Bank Name Bank Of America Account Type Checking Please take into consideration that the settlement of your payment will take 3 to 4 business days. To avoid a non-sufficient funds fee, please be sure that your bank account has the sufficient funds to cover your payment. <input type="button" value="Next"/> <input type="button" value="Cancel"/> </div> <div> Enter payment amount Confirm payment account </div> </div> <p>Note: You should also note the convenience fee associated with ePayment and confirm the payment account.</p> <p>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.</p>



You will need to confirm the payment amount and click the **Confirm** button to process the payment.

Please Confirm Your Payment

Payment Confirmation

Rental	40 Cervantes Blvd Unit 1 - Active
Amount	\$6,225.00
Convenience Fee	\$3.00
Total Amount	\$6,228.00
Confirm Payment Amount	<input type="text"/>

Confirm Payment Amount

Payment Account

Payment Method	E-Check
Bank Name	Bank Of America
Account Number	XXX4567

Please take into consideration that the settlement of your payment will take 3 to 4 business days. To avoid a non-sufficient funds fee, please be sure that your bank account has the sufficient funds to cover your payment.



Click Confirm Only Once!

Previous

Confirm

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.	

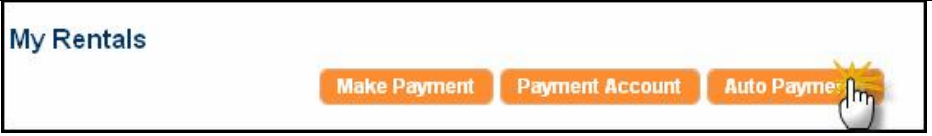

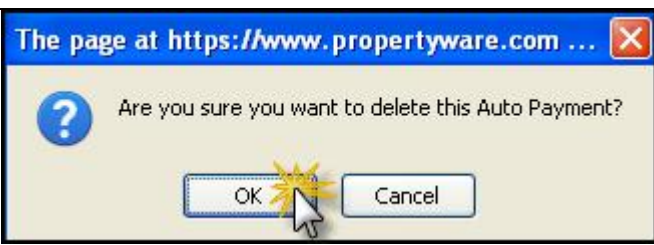
<p>Complete all required fields.</p>	<div data-bbox="406 281 1190 703"> <p>My Rentals > Auto Payments > New</p> <p>Auto Payment Information</p> <p>Rental: 40 Cervantes Blvd Unit 1 - Active</p> <p>Amount: \$600.00 A convenience fee of \$3.00 will be added to your payment.</p> <p>Start Date: 05/01/2010</p> <p>End Date: (Leave blank to continue until Lease termination)</p> <p>Frequency: Monthly</p> <p>Pay Day: 1</p> <p>Description:</p> <p>Please take into consideration that the settlement of your payment will take 3 to 4 business days. To avoid a non-sufficient funds fee, please be sure that your bank account has the sufficient funds to cover your payment.</p> <p>Next Cancel</p> </div> <p>Note: The convenience fee will be displayed under the Amount field.</p>														
<p>Confirm the total amount to be paid each month and click the Save button.</p>	<div data-bbox="406 846 1318 1180"> <p>Please Confirm Your Auto Payment</p> <p>Confirm Auto Payment</p> <p>Rental: 40 Cervantes Blvd Unit 1 - Active</p> <p>Amount: \$600.00</p> <p>Convenience Fee: \$3.00</p> <p>Total Amount: \$603.00</p> <p>Confirm Total Amount: \$603.00</p> <p>Please take into consideration that the settlement of your payment will take 3 to 4 business days. To avoid a non-sufficient funds fee, please be sure that your bank account has the sufficient funds to cover your payment.</p> <p>Previous Save Cancel</p> </div>														
<p>You will be directed to the My Rentals tab > Auto Payments screen, confirming the payment has been set for recurring.</p>	<div data-bbox="406 1230 1364 1434"> <p>My Rentals > Auto Payments</p> <p>Schedule Auto Payment</p> <p>Auto Payments</p> <table border="1"> <thead> <tr> <th>Amount</th> <th>Fee</th> <th>Frequency</th> <th>Start Date</th> <th>End Date</th> <th>Pay Day</th> <th>Action</th> </tr> </thead> <tbody> <tr> <td>\$600.00</td> <td>\$3.00</td> <td>Monthly</td> <td>05/01/2010</td> <td></td> <td>1</td> <td>-- Choose --</td> </tr> </tbody> </table> </div>	Amount	Fee	Frequency	Start Date	End Date	Pay Day	Action	\$600.00	\$3.00	Monthly	05/01/2010		1	-- Choose --
Amount	Fee	Frequency	Start Date	End Date	Pay Day	Action									
\$600.00	\$3.00	Monthly	05/01/2010		1	-- Choose --									

Deleting Auto Payments

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

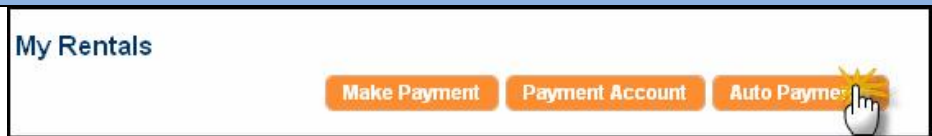

Step	Action/Screen
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From the My Rentals or My Account tab, click the Auto Payments button.	
Click Delete from the Action dropdown.	 <p>Note: Payments can be deleted by selecting the View Detail option from the Action dropdown and clicking the Delete button on the Details screen.</p>
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.	<div> My Rentals > Auto Payments > New </div> <div> Auto Payment Information </div> <div> Rental: 40 Cervantes Blvd Unit 1 - Active Amount: \$600.00 A convenience fee of \$3.00 will be added to your payment. Start Date: 12/1/2011 End Date: (Leave blank to continue until Lease termination) Frequency: Monthly Pay Day: 1 Description: </div> <div> Please take into consideration that the settlement of your payment will take 3 to 4 business days. To avoid a non-sufficient funds fee, please be sure that your bank account has the sufficient funds to cover your payment. </div> <div> Next Cancel </div>
Confirm the total amount to be paid each month and click the Save button.	<div> Please Confirm Your Auto Payment </div> <div> Confirm Auto Payment </div> <div> Rental: 40 Cervantes Blvd Unit 1 - Active Amount: \$600.00 Convenience Fee: \$3.00 Total Amount: \$603.00 Confirm Total Amount: \$603.00 </div> <div> Please take into consideration that the settlement of your payment will take 3 to 4 business days. To avoid a non-sufficient funds fee, please be sure that your bank account has the sufficient funds to cover your payment. </div> <div> Previous Save Cancel </div>

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.	<div> Welcome Tommy Bahama </div> <div> New Service Request </div> <div> My Contact Information: Home Phone, Work Phone, Mobile Phone, Email: john_kettles@yahoo.com My Open Service Requests: SR #, Date Created, Action Conversations: No Conversations </div> <div> Note: You will be directed to the Maintenance tab to complete the </div>

	request.
Fill in all the relevant fields. Preferred time to enter and Description are required fields.	<div data-bbox="548 357 1432 766"> <p>Service Request Information</p> <p>Building/Unit 23 Presidio Lane</p> <p>Specific Location</p> <p>Description</p> <p>Preferred Time to Enter <input checked="" type="radio"/> Anytime <input type="radio"/> Preferred Date: Time: 1 00 AM</p> <p>Attach Document Choose File No file chosen</p> <p>Save Cancel</p> </div> <ul style="list-style-type: none"> • 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.	<div data-bbox="548 1024 922 1150">  </div> <p>The management company will be notified via email that a service request has been saved.</p>


Important

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



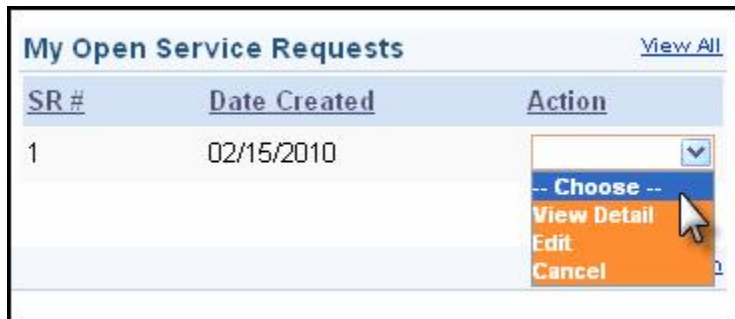
You must correct the following errors:

- Preferred Time to Enter is required
- Description is required

Review, Cancel and Edit Existing Service Requests

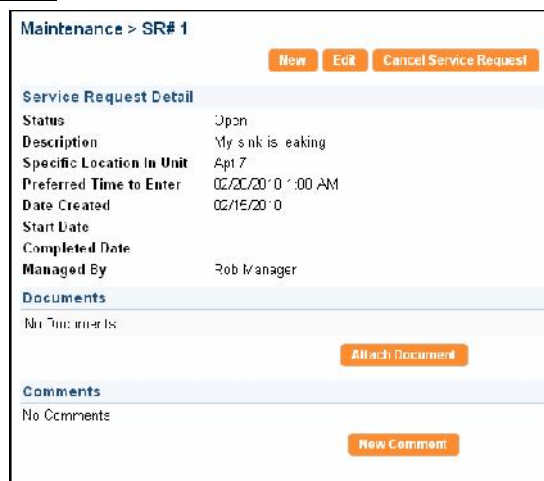
You will be able to view all of your requests in the My Account tab. Links to review, cancel and edit the existing service requests will also be available. The My Open Service Requests portion of the My

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.



SR #	Date Created	Action
1	02/15/2010	<div> -- Choose -- View Detail Edit Cancel </div>

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



Maintenance > SR# 1

[New](#)
[Edit](#)
[Cancel Service Request](#)

Service Request Detail

Status: Open
Description: My sink is leaking
Specific Location In Unit: Apt 7
Preferred Time to Enter: 02/20/2010 1:00 AM
Date Created: 02/15/2010
Start Date:
Completed Date:
Managed By: Rob Manager

Documents

No Documents

[Attach Document](#)

Comments

No Comments

[New Comment](#)

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



Maintenance > Edit SR# 2

[Save](#)
[Cancel](#)

Service Request Information

SR #: 2
Building/Unit: 23 Presidio Lane
Specific Location:
Description: sink is leaking
Preferred Time to Enter: ☒ Anytime ☐ Preferred Date: Time: 1:00 AM
Attach Document: [Choose File](#) No file chosen

[Save](#)
[Cancel](#)

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.

Welcome Tommy Bahama

My Contact Information

[View Detail](#)
[Edit](#)

Home Phone	555-1212
Work Phone	555-1212
Mobile Phone	555-1212
Email	tommy.bahama@pw.com

My Contact Information

[View Detail](#)
[Edit](#)

Home Phone	555-1212
Work Phone	555-1212
Mobile Phone	555-1212
Email	tommy.bahama@pw.com

The following information is displayed:

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

Home > View Contact Info

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

Contact Information

First Name	Tommy
Last Name	Bahama
Email	tommy.bahama@pw.com
Company	
Address	23 Presidio Lane
Address 2	
City	San Francisco
State/Province	CA
Zip/Postal Code	94089
Country	USA
Home Phone	555-1212
Work Phone	555-1212
Mobile Phone	555-1212

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.	<div> <div>My Contact Information</div> <div> View Detail Edit </div> </div> <table> <tr> <td>Home Phone</td> <td>555-1212</td> </tr> <tr> <td>Work Phone</td> <td>555-1212</td> </tr> <tr> <td>Mobile Phone</td> <td>555-1212</td> </tr> <tr> <td>Email</td> <td>tommy.bahama@pw.com</td> </tr> </table>	Home Phone	555-1212	Work Phone	555-1212	Mobile Phone	555-1212	Email	tommy.bahama@pw.com
Home Phone	555-1212								
Work Phone	555-1212								
Mobile Phone	555-1212								
Email	tommy.bahama@pw.com								


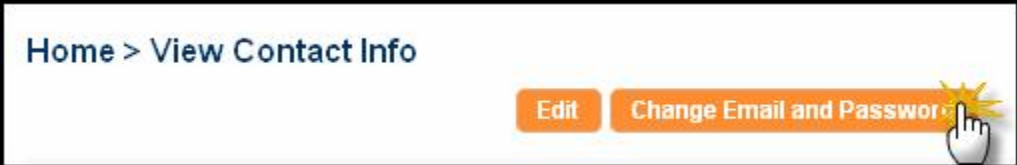
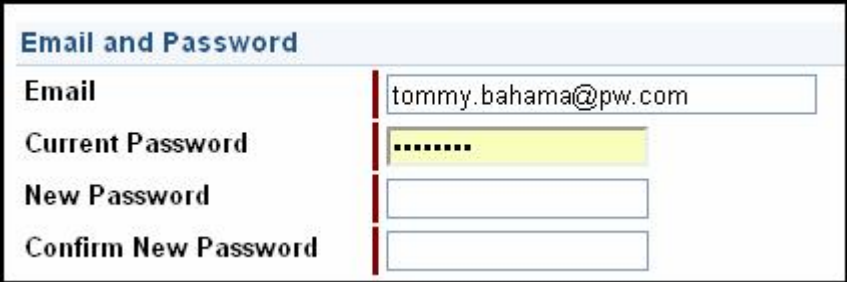

<p>Update the relevant fields.</p>	<div> Home > Edit Contact <div>Save Cancel</div> <div> Edit Contact Information </div> <div> <div>First Name</div>Tommy <div>Last Name</div>Bahama <div>Email</div>tommy.bahama@pw.com <div>Company</div> <div>Address</div>23 Presidio Lane <div>Address 2</div> <div>City</div>San Francisco <div>State/Province</div>CA <div>Zip/Postal Code</div>94089 <div>Country</div>USA <div>Home Phone</div>555-1212 <div>Work Phone</div>555-1212 <div>Mobile Phone</div>555-1212 <div>Save Cancel</div> </div> </div>	
<p>Click the Save button.</p>	<div> <div>Save Cancel</div> </div>	

Note: The name cannot be changed. The email address can be changed but not from this view.



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.	 <p>Note: The current password will automatically be entered in the appropriate field.</p>
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.

Conversations		New Conversation
Tommy Bahama 3/1/10 4:5:42 PM	Rent Hi, Wanted to make sure you got my rent check.	1 Comment(s)

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 from the My Accounts tab.

Step	Action/Screen
Click the New Conversation link	
Complete all relevant fields.	<div> Lease > New Conversation Edit Comment <div> <div>Save</div> <div>Cancel</div> </div> <div> Lease <div>23 Presidio Lane - Active</div> </div> <div> Subject <div></div> </div> <div> Description <div></div> </div> <div> <div>Save</div> <div>Cancel</div> </div> </div> <p>The lease will automatically display. If the tenant has more than one lease, they can select the lease in question from the dropdown.</p>

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.

Conversations		New Conversation
John Kettles 3/1/10 4:14:20 PM	Rent Hi Tommy, We did receive your rent. Please let me know if you have any additional questions. Mark	2 Comment(s)

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

Conversations		New Conversation
John Kettles 3/1/10 4:14:20 PM	Rent Hi Tommy, We did receive your rent. Please let me know if you have any additional questions. Mark	2 Comment(s)

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

Conversation: Rent

Comments

[Back](#) [New Comment](#)

Tommy Bahama
 3/1/10 4:14:20 PM

Hi, I just wanted to make sure you received my March rent. Thanks, Tommy

John Kettles
 3/1/10 4:16:28 PM

Hi Tommy, We did receive your rent. Please let me know if you have any additional questions. Mark

[Back](#) [New Comment](#)

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



Home | Help | Logout

My Account My Rentals Maintenance Documents

My Rentals

My Rentals

Address	Unit	Last Payment Date	Deposit Held	Total Unpaid	Balance	Action
23 Presidio Lane	-	02/22/2010	\$1,500.00	\$750.00	\$750.00	<input type="text"/>

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



My Account My Rentals Maintenance Documents

My Rentals

Make Payment Payment Account Auto Payments







My Rentals


Address	Unit	Last Payment Date	Deposit Held	Total Unpaid	Balance	Action
40 Cervantes Blvd Unit 1	Unit 1	12/16/2009	\$2,000.00	\$6,225.00	\$6,225.00	--- Choose ---



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.	<div> <p>Welcome Mrs. Allison West</p> <p>    </p> </div> <p>If this is the first time you are attempting an electronic payment, an error will display advising you to setup a payment account.</p> <div>  <p>You must correct the following errors:</p> <ul style="list-style-type: none"> You must setup a payment account before making a payment </div>
Depending on the options available, you may need to select which type of payment you want to use: E-Check or Credit Card.	<div> <p>Payment Method</p> <p> <input checked="" type="radio"/>  ACH E-Check <input type="radio"/>  Credit Card </p> </div> <p>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.</p>

<p>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.</p>	<div> <div> Payment Method <input checked="" type="radio"/> E-Check <input type="radio"/> Credit Card </div> <div> <p>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.</p> <p>Bank Name <input type="text"/></p> <p>Account Type <input type="text" value="Checking"/></p> <p>Routing Number <input type="text"/></p> <p>Account Number <input type="text"/></p> <p> <input type="text" value="00000076944"/> <input type="text" value="123456789"/> <input type="text" value="1001"/> </p> <p>Routing Number Account Number Check Number</p> <p>Social Security # <input type="text"/></p> <p>OR</p> <p>Drivers License # <input type="text"/></p> <p>Drivers License State/Province <input type="text"/></p> </div> <div> Billing Information <input type="checkbox"/> Same as Contact <p>Billing Address <input type="text"/></p> <p>Address 2 <input type="text"/></p> <p>City <input type="text"/></p> <p>State/Province <input type="text"/></p> <p>Zip/Postal Code <input type="text"/></p> <p>Billing Email <input type="text"/></p> </div> </div>
<p>If Credit Card is selected, you will need to complete all of the fields.</p>	<div> <div> <input type="radio"/> E-Check <input checked="" type="radio"/> Credit Card </div> <div> <p>Card Number <input type="text"/></p> <p>Card Verification <input type="text"/></p> <p>Card Expiration <input type="text" value="1 - January"/> <input type="text" value="2008"/></p> </div> <div> Billing Information <input type="checkbox"/> Same as Contact <p>Billing Address <input type="text"/></p> <p>Address 2 <input type="text"/></p> <p>City <input type="text"/></p> <p>State/Province <input type="text"/></p> <p>Zip/Postal Code <input type="text"/></p> <p>Billing Email <input type="text"/></p> </div> </div> <div> <input type="button" value="Save"/> <input type="button" value="Cancel"/> </div>
<p>Click the Save button.</p>	



You will be redirected to the My Rentals tab > Make Payment screen. Enter the payment amount and click the **Next** button.

My Rentals > Make a Payment

Payment Amount

Rental	40 Cervantes Blvd Unit 1 - Active	Enter payment amount
Balance Amount	\$6,225.00	

Convenience Fee A convenience fee of _____ will be added to your payment.

Payment Account

Payment Method	E-Check	Confirm payment account
Bank Name	Bank Of America	
Account Type	Checking	

Please take into consideration that the settlement of your payment will take 3 to 4 business days. To avoid a non-sufficient funds fee, please be sure that your bank account has the sufficient funds to cover your payment.

Next **Cancel**

Note: You should also note the convenience 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.

Please Confirm Your Payment

Payment Confirmation

Rental	40 Cervantes Blvd Unit 1 - Active	Confirm Payment Amount
Amount	\$6,225.00	
Convenience Fee	\$3.00	
Total Amount	\$6,228.00	

Confirm Payment Amount

Payment Account

Payment Method	E-Check
Bank Name	Bank Of America
Account Number	XXX4567

Please take into consideration that the settlement of your payment will take 3 to 4 business days. To avoid a non-sufficient funds fee, please be sure that your bank account has the sufficient funds to cover your payment.

Click Confirm Only Once!

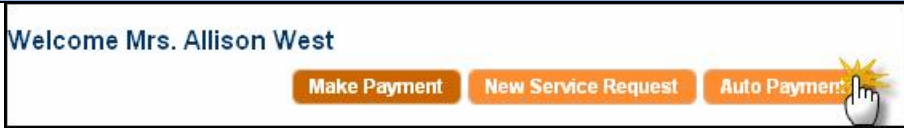

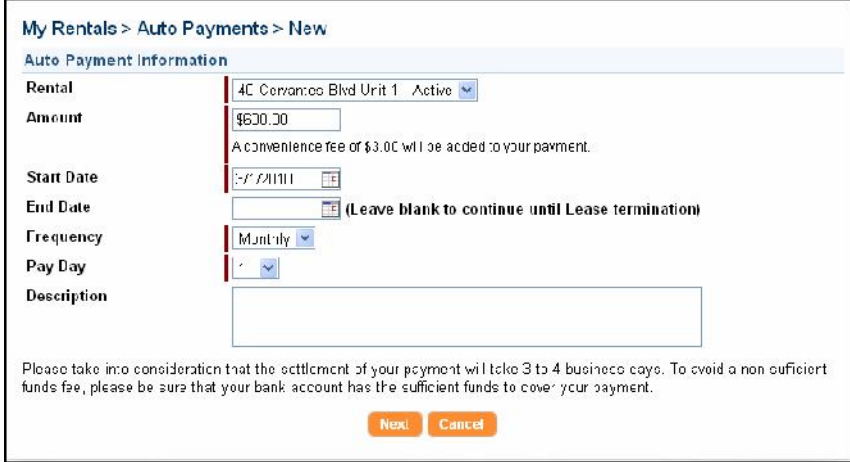
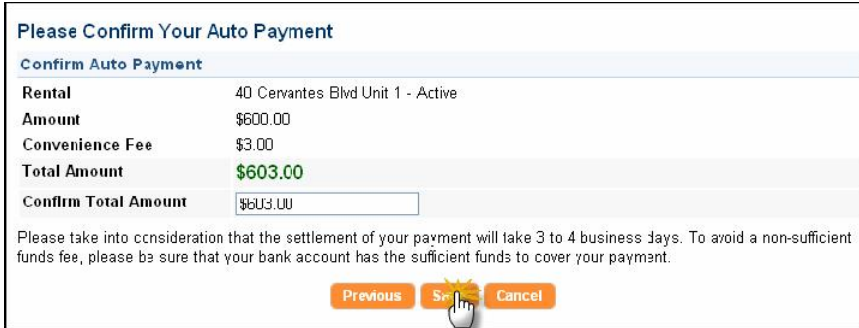
Previous **Confirm**

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.	 <p>Note: The convenience fee will be displayed under the Amount field.</p>
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.

My Rentals > Auto Payments

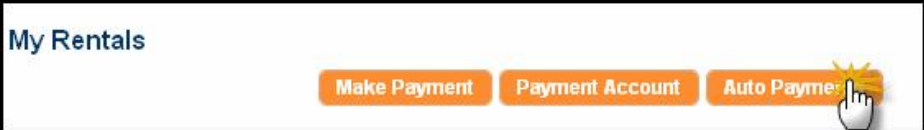

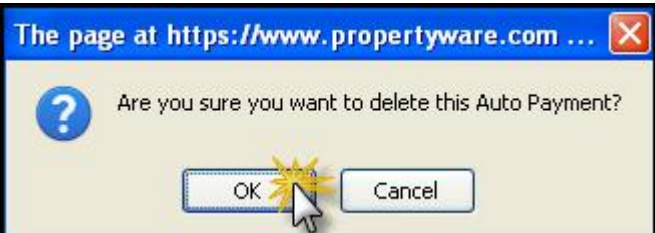
Schedule Auto Payment

Auto Payments

Amount	Fee	Frequency	Start Date	End Date	Pay Day	Action
\$600.00	\$3.00	Monthly	05/01/2010		1	-- Choose --

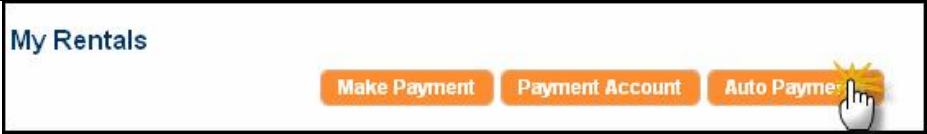

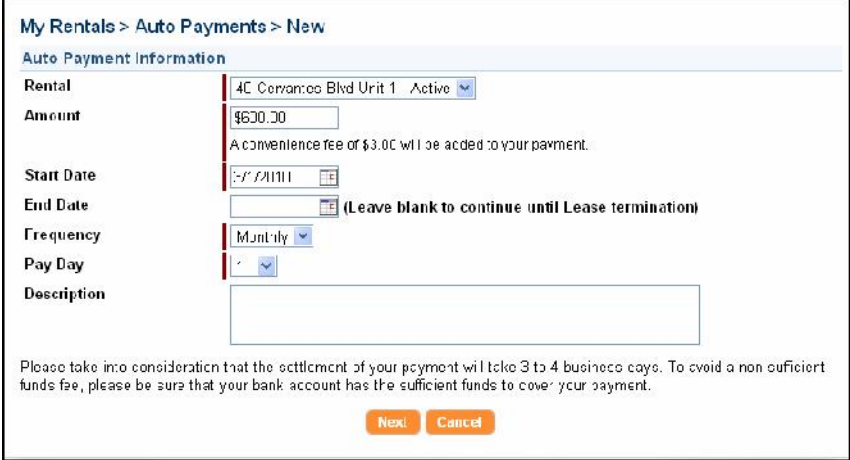
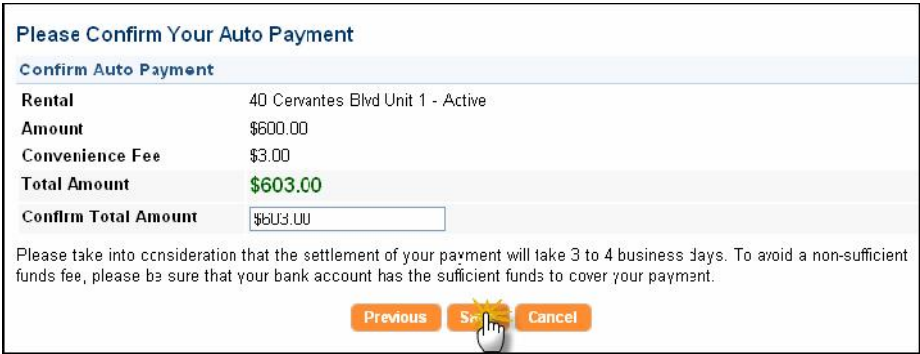
Deleting Auto Payments

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.	 <p>Note: Payments can be deleted by selecting the View Detail option from the Action dropdown and clicking the Delete button on the Details screen.</p>
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.	<div> </div> <p>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.</p>
Edit the account details.	<div> <div> <h3>E-Check</h3> </div> <div> <h3>Credit Card</h3> </div> </div>

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.	<p>My Rentals > 23 Presidio Lane</p> <p>1 Give Notice Print</p> <p>2 Rental Detail</p> <p>Address 23 Presidio Lane in San Francisco, CA Move In Date 02/16/2010 Unit - End Date 02/14/2011 Status Active Start Date 02/15/2010</p> <p>3 Tenant Ledger</p> <table><tr><td>Total Unpaid</td><td>Deposit Held</td><td>Prepayments</td></tr><tr><td>\$750.00</td><td>\$1,500.00</td><td>\$0.00</td></tr></table> <table><tr><th>Type</th><th>Date</th><th>Ref #</th><th>Comments</th><th>Amount</th><th>Balance</th></tr><tr><td>Rent</td><td>03/01/2010</td><td></td><td></td><td>\$2 000.00</td><td>\$2 000.00</td></tr><tr><td>Payment</td><td>02/22/2010</td><td>002</td><td></td><td>(\$35.00)</td><td>(\$0.00)</td></tr><tr><td>Late Fee (Manual)</td><td>02/22/2010</td><td>01</td><td>This is a manual late fee since the earlier one was accidentally credited</td><td>\$35.00</td><td>\$35.00</td></tr><tr><td>Payment</td><td>02/19/2010</td><td>948</td><td></td><td>(\$1,250.00)</td><td>(\$0.00)</td></tr><tr><td>Payment</td><td>02/16/2010</td><td>23</td><td></td><td>(\$2,428.57)</td><td>(\$0.00)</td></tr><tr><td>Security Deposit</td><td>02/16/2010</td><td></td><td></td><td>\$1 500.00</td><td>\$2 428.57</td></tr><tr><td>Rent</td><td>02/16/2010</td><td></td><td>Forfeited for 13 days</td><td>\$928.57</td><td>\$928.57</td></tr></table> <ol style="list-style-type: none">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.Rental Details include the address, status, move in, and lease start and end dates.The ledger is not always available but may include the details of payments and adjustments on the lease, including deposits.	Total Unpaid	Deposit Held	Prepayments	\$750.00	\$1,500.00	\$0.00	Type	Date	Ref #	Comments	Amount	Balance	Rent	03/01/2010			\$2 000.00	\$2 000.00	Payment	02/22/2010	002		(\$35.00)	(\$0.00)	Late Fee (Manual)	02/22/2010	01	This is a manual late fee since the earlier one was accidentally credited	\$35.00	\$35.00	Payment	02/19/2010	948		(\$1,250.00)	(\$0.00)	Payment	02/16/2010	23		(\$2,428.57)	(\$0.00)	Security Deposit	02/16/2010			\$1 500.00	\$2 428.57	Rent	02/16/2010		Forfeited for 13 days	\$928.57	\$928.57
Total Unpaid	Deposit Held	Prepayments																																																					
\$750.00	\$1,500.00	\$0.00																																																					
Type	Date	Ref #	Comments	Amount	Balance																																																		
Rent	03/01/2010			\$2 000.00	\$2 000.00																																																		
Payment	02/22/2010	002		(\$35.00)	(\$0.00)																																																		
Late Fee (Manual)	02/22/2010	01	This is a manual late fee since the earlier one was accidentally credited	\$35.00	\$35.00																																																		
Payment	02/19/2010	948		(\$1,250.00)	(\$0.00)																																																		
Payment	02/16/2010	23		(\$2,428.57)	(\$0.00)																																																		
Security Deposit	02/16/2010			\$1 500.00	\$2 428.57																																																		
Rent	02/16/2010		Forfeited for 13 days	\$928.57	\$928.57																																																		



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.

Maintenance				
New Service Request				
My Service Requests				
SR #	Date Created	Description	Status	Action
3	03/01/2010	leaky faucet.	Open	<div> <div>Choose</div> <div>View Detail</div> <div>Edit</div> </div>
2	03/01/2010	sink is leaking	Canceled By Tenant	
1	02/15/2010	My sink is leaking	Canceled By Tenant	

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.

Maintenance > SR# 3

[New](#)
[Edit](#)
[Cancel Service Request](#)

Service Request Detail

Status

Open

Description

leaky faucet.

Specific Location In Unit

Preferred Time to Enter

Any Time

Date Created

03/01/2010

Start Date

Completed Date

Managed By

Rob

Documents

No Documents

[Attach Document](#)

Comments

No Comments

[New Comment](#)

Comments

Tommy Bahama

3/1/10 4:41:54 PM

This request needs to be re-opered.

[New Comment](#)



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.

Building Documents
Documents
There are no Building documents available

Lease Documents
Documents
There are no Lease documents available

Other Documents
Documents

File Name	Size	Uploaded	Uploaded by
 System_Notes_JK.docx	438k	2/16/2010	jkettles

**Important**

You must have the appropriate software to open the document.