



# Tenant Portal Guide

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### **PURPOSE**

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



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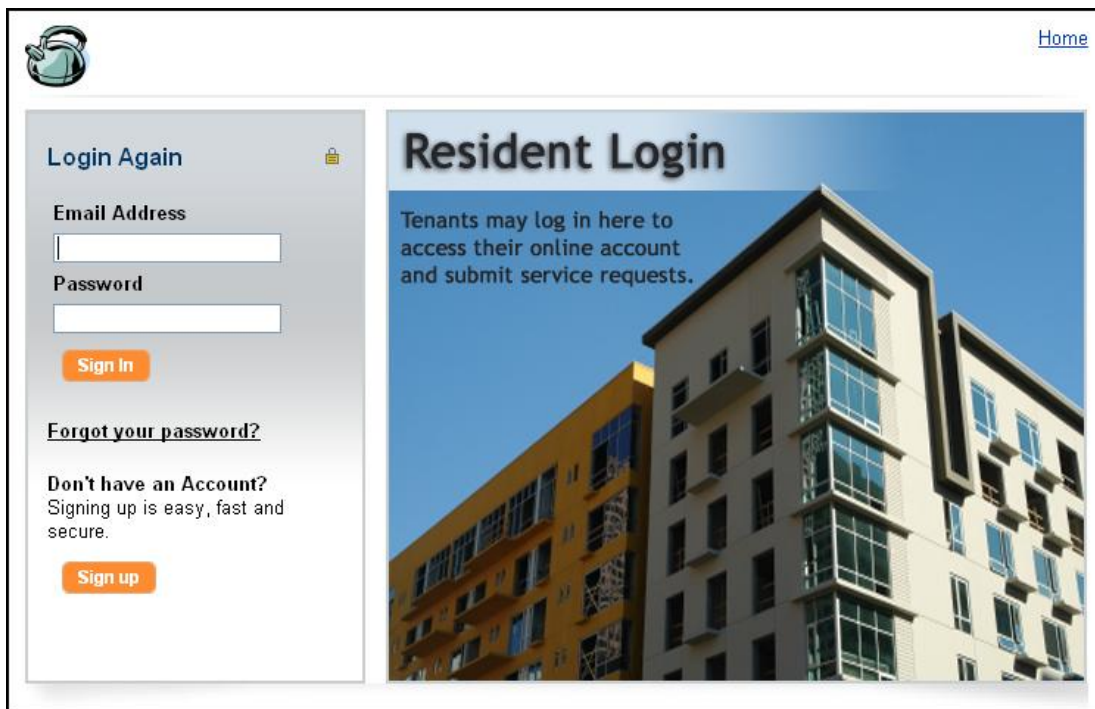
## Tenant Portal

The Tenant Portal allows real-time access to lease information via the internet. From the Tenant Portal, you can:

- Review and edit contact information.
- Create and manage services requests.
- View your rental details.
- Give notice.
- Communicate with the property management team.
- Review documents shared by the owner or property management company.

### Logging into the Tenant Portal

You need an email address to access your personalized portal. Your email address is your username for logging into your account. Your property manager sends an email with login instructions.



If you forget your password, use the **Forgot your password?** link to request a new password. You need to provide your first and last names and email. Enter the same email address that your property manager has on file.



## Signing up for Tenant Account

You can sign up for your Tenant Portal account at the property management company website.  
From the Tenant Portal link, click the **Sign up** button.

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

[Sign up](#)

Fill out all the required fields and click the **Submit** button.  
Note that the information you submit must match to the information on your lease file.

### Signup

Signup to receive a login account

First Name	<input type="text"/>
Last Name	<input type="text"/>
Email	<input type="text"/>
Address	<input type="text"/>
Address 2	<input type="text"/>
City	<input type="text"/>
State/Province	<input type="text"/>
Zip/Postal Code	<input type="text"/>
Comments	<input type="text"/>

[Submit](#) [Cancel](#)

After you submit, you receive an email with login instructions from your property management team.



Login to your account to access your personalized data published by the property management team.

## Propertyware [Home](#) | [Help](#) | [Logout](#)

343 Sansome Ave,  
San Francisco, CA 94104

My Account
My Rentals
Maintenance
Documents
Renter's Insurance


**Welcome Adam Bishop**

[New Service Request](#)

<div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 5px;"> <b>My Contact Information</b> <span style="float: right;"><a href="#">View Detail</a> <a href="#">Edit</a> <a href="#">Change Email/Password</a></span> </div> <p>Home Phone (408) 852-4452          Work Phone (408) 558-9910          Mobile Phone (408) 996-3737          Email a.bishop@pw.com</p>	<div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 5px;"> <b>My Open Service Requests</b> <span style="float: right;"><a href="#">View All</a></span> </div> <table border="1" style="width: 100%; border-collapse: collapse; text-align: center;"> <thead> <tr style="background-color: #e6f2ff;"> <th style="padding: 5px;">SR #</th> <th style="padding: 5px;">Date Created</th> <th style="padding: 5px;">Action</th> </tr> </thead> <tbody> <tr> <td style="padding: 5px;">2</td> <td style="padding: 5px;">05/20/2010</td> <td style="padding: 5px;"><a href="#">-- Choose --</a> ▼</td> </tr> </tbody> </table>	SR #	Date Created	Action	2	05/20/2010	<a href="#">-- Choose --</a> ▼
SR #	Date Created	Action					
2	05/20/2010	<a href="#">-- Choose --</a> ▼					

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

No Conversations



**Your landlord's insurance policy doesn't cover your belongings.** Even if the damage was caused by Mother Nature or your neighbor, your landlord isn't responsible for replacing your things. [READ MORE ->>](#)

**Can you replace everything in your apartment for \$200?** That's about the annual cost of renter's insurance. Your flat screen television, clothes, dishes. The cost of your belongings adds up quickly. [READ MORE ->>](#)

**eRenterPlan**  
**HAS YOU COVERED**  
 Get a **FREE QUOTE** >>>>

## Tenant Portal Navigation Tabs

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The Tenant Portal has navigation tabs on the top as shown below. Click a tab to select it. The selected tab changes to white.



Your management company may change default title names for the tabs. For example, they may rename **My Rentals** to **Statements**. However, the function of the tabs remains the same.

- **My Account** — provides an overview of your profile including contact information and lets you make service requests and conversations.
- **My Rentals** — shows lease details for rentals.
- **Maintenance** — lists all your maintenance requests in a chronological order regardless of status.
- **Documents** — provides links to shared building, lease, or any other document posted by the management company.
- **Renter's Insurance** — contains information about your renter's insurance policy.

The following links are located in the upper right-hand corner of your portal and direct you to different locations.



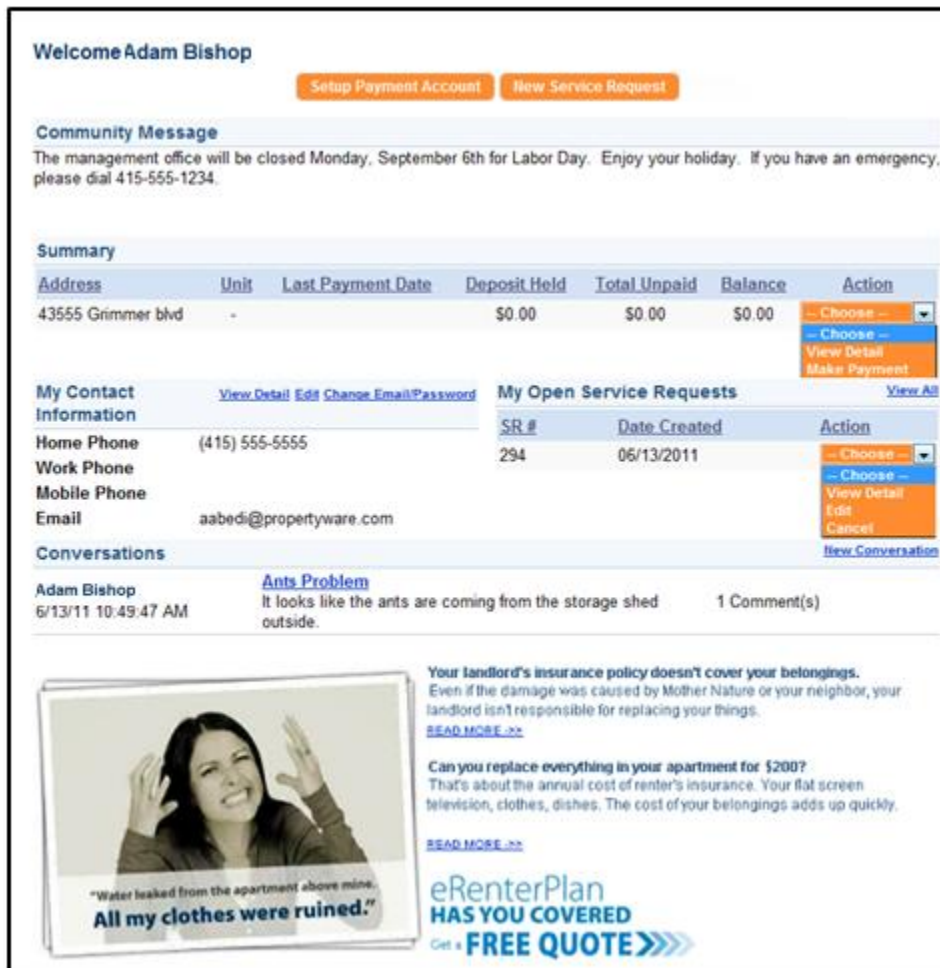
- **Home** — directs you to the management team homepage.
- **Help** — takes you to help topics for the Tenant Portal.
- **Logout** — closes the session in the portal. Always log out at the end of every session to maintain the security of your account.



## My Account

The **My Account** has the following buttons and sections:

- **Setup Payment Account buttons:** Setup a payment account.
- **New Service buttons:** Create new service requests.
- **Community Message:** Look at the management team message.
- **Summary:** View your lease information and make payments.
- **My Contact Information:** View and edit contact information and change password.
- **My Open Service Requests:** Review, cancel, and edit existing service requests.
- **Conversations:** Converse with your management team.
- **Renter’s Insurance Advertisement:** If you haven’t purchased rental insurance, you see an eRenter Plan advertisement.



**Welcome Adam Bishop**

[Setup Payment Account](#) [New Service Request](#)

**Community Message**  
The management office will be closed Monday, September 6th for Labor Day. Enjoy your holiday. If you have an emergency, please dial 415-555-1234.

**Summary**

Address	Unit	Last Payment Date	Deposit Held	Total Unpaid	Balance	Action
43555 Grimmer Blvd	-		\$0.00	\$0.00	\$0.00	<a href="#">-- Choose --</a> <a href="#">-- Choose --</a> <a href="#">View Detail</a> <a href="#">Make Payment</a>

**My Contact Information** [View Detail](#) [Edit](#) [Change Email/Password](#)

Home Phone: (415) 555-5555  
 Work Phone:  
 Mobile Phone:  
 Email: aabedi@propertyware.com

**My Open Service Requests** [View All](#)

SR #	Date Created	Action
294	06/13/2011	<a href="#">-- Choose --</a> <a href="#">-- Choose --</a> <a href="#">View Detail</a> <a href="#">Edit</a> <a href="#">Cancel</a>

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

Adam Bishop  
6/13/11 10:49:47 AM [Ants Problem](#)  
It looks like the ants are coming from the storage shed outside. 1 Comment(s)

**Your landlord's insurance policy doesn't cover your belongings.**  
Even if the damage was caused by Mother Nature or your neighbor, your landlord isn't responsible for replacing your things.  
[READ MORE >>](#)

**Can you replace everything in your apartment for \$200?**  
That's about the annual cost of renter's insurance. Your flat screen television, clothes, dishes. The cost of your belongings adds up quickly.  
[READ MORE >>](#)

**eRenterPlan**  
HAS YOU COVERED  
Get a **FREE QUOTE >>>**

*"Water leaked from the apartment above mine. All my clothes were ruined."*



If you select the **Credit Card** payment method, you need to complete all of the fields.

**Payment Method**

E-Check  Credit Card

Card Number:

Card Verification:

Card Expiration: 1 - January 2008

**Billing Information**

Same as Contact

Billing Address:

Address 2:

City:

State/Province:

Zip/Postal Code:

Billing Email:

Save Cancel

Click the **Save** button.

Save Cancel

Once the payment account has been setup, you can initiate a one-time payment.


Step	Action/Screen														
<p>Choose the <b>Make Payment</b> option from the dropdown <b>Action</b> menu or click the <b>Make Payment</b> button from the <b>My Account</b> screen.</p>	<div style="border: 1px solid black; padding: 5px;"> <p><b>Summary</b></p> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr style="background-color: #4F81BD; color: white;"> <th>Address</th> <th>Unit</th> <th>Last Payment Date</th> <th>Deposit Held</th> <th>Total Unpaid</th> <th>Balance</th> <th>Action</th> </tr> </thead> <tbody> <tr> <td>43555 Grimmer Blvd</td> <td>-</td> <td></td> <td>\$6,225.00</td> <td>\$6,225.00</td> <td>\$6,225.00</td> <td> <input type="button" value="-- Choose --"/>  <input type="button" value="-- Choose --"/>  <input type="button" value="View Detail"/>  <input type="button" value="Make Payment"/> </td> </tr> </tbody> </table> </div>	Address	Unit	Last Payment Date	Deposit Held	Total Unpaid	Balance	Action	43555 Grimmer Blvd	-		\$6,225.00	\$6,225.00	\$6,225.00	<input type="button" value="-- Choose --"/> <input type="button" value="-- Choose --"/> <input type="button" value="View Detail"/> <input type="button" value="Make Payment"/>
Address	Unit	Last Payment Date	Deposit Held	Total Unpaid	Balance	Action									
43555 Grimmer Blvd	-		\$6,225.00	\$6,225.00	\$6,225.00	<input type="button" value="-- Choose --"/> <input type="button" value="-- Choose --"/> <input type="button" value="View Detail"/> <input type="button" value="Make Payment"/>									
<p>Enter the payment amount and click the <b>Next</b> button.</p>	<div style="border: 1px solid black; padding: 5px;"> <p><b>Payment Amount</b></p> <p>Rental: 40 Cervantes Blvd Unit 1 - Active</p> <p>Balance: \$6,225.00</p> <p>Amount: <input type="text"/></p> <p><b>Convenience Fee</b>: A convenience fee of <input type="text"/> will be added to your payment.</p> <p><b>Payment Account</b></p> <p>Payment Method: E-Check</p> <p>Bank Name: Bank Of America</p> <p>Account Type: Checking</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 style="text-align: center;">Next Cancel</p> </div> <p><b>Note:</b> Enter the convenience fee associated with ePayment. The transaction may take 1-4 business days depending on the transaction type.</p>														

Confirm the payment amount and click the **Confirm** button to process the payment.

**Please Confirm Your Payment**

**Payment Confirmation**


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





**Payment Account**

<b>Payment Method</b>	E-Check
<b>Bank Name</b>	Bank Of America
<b>Account Number</b>	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!**

**Note:** To change the payment amount, click the **Previous** button. To prevent duplicate billing, click the **Confirm** button only once.

### Setting up Auto Payments

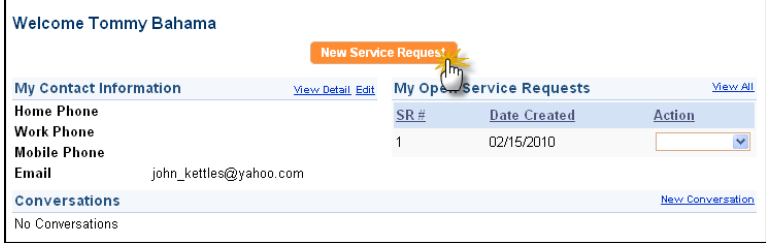
Auto payments allow you to set up an automatic monthly debit from your credit card or checking account. You can choose a start date for recurring payments. You can cancel the auto payment at any time.

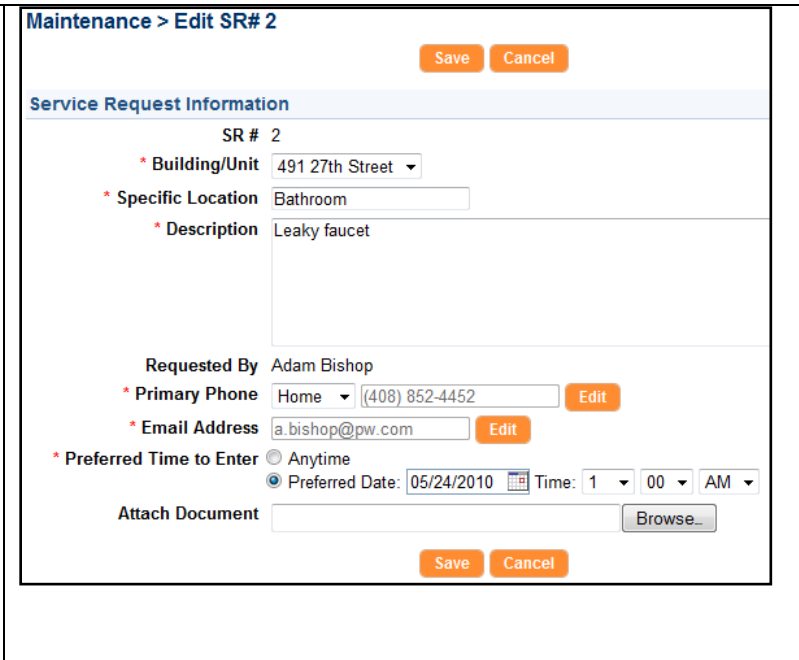

Step	Action/Screen
From the <b>My Account</b> or <b>My Rental</b> screen, click the <b>Make Payment</b> button.	<div style="border: 1px solid #ccc; padding: 10px;"> <p style="margin: 0;"><b>Welcome Mrs. Allison West</b></p> <div style="text-align: right; margin-top: 10px;"> <span style="margin-right: 10px;"></span> <span style="margin-right: 10px;"></span> <span></span> </div> </div>
Click the <b>Schedule Auto Payment</b> button.	<div style="border: 1px solid #ccc; padding: 10px;"> <p style="margin: 0;"><b>My Rentals &gt; Auto Payments</b></p> <div style="text-align: right; margin-top: 20px;">  </div> </div>


<p>Complete all required fields.</p>	<p><b>My Rentals &gt; Auto Payments &gt; New</b></p> <p><b>Auto Payment Information</b></p> <p>Rental: 40 Cervantes Blvd Unit 1 - Active</p> <p>Amount: \$600.00  <small>A convenience fee of \$3.00 will be added to your payment.</small></p> <p>Start Date: 3/1/2010</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><a href="#">Next</a> <a href="#">Cancel</a></p>										
<p>Confirm the total amount to be paid each month and click the <b>Save</b> button.</p>	<p><b>Please Confirm Your Auto Payment</b></p> <p><b>Confirm Auto Payment</b></p> <table border="1"> <tr> <td>Rental</td> <td>40 Cervantes Blvd Unit 1 - Active</td> </tr> <tr> <td>Amount</td> <td>\$600.00</td> </tr> <tr> <td>Convenience Fee</td> <td>\$3.00</td> </tr> <tr> <td><b>Total Amount</b></td> <td><b>\$603.00</b></td> </tr> <tr> <td>Confirm Total Amount</td> <td>\$603.00</td> </tr> </table> <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><a href="#">Previous</a> <a href="#">Save</a> <a href="#">Cancel</a></p>	Rental	40 Cervantes Blvd Unit 1 - Active	Amount	\$600.00	Convenience Fee	\$3.00	<b>Total Amount</b>	<b>\$603.00</b>	Confirm Total Amount	\$603.00
Rental	40 Cervantes Blvd Unit 1 - Active										
Amount	\$600.00										
Convenience Fee	\$3.00										
<b>Total Amount</b>	<b>\$603.00</b>										
Confirm Total Amount	\$603.00										

### 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 document that may be relevant to the process.


Step	Action/Screen																
<p>From the <b>My Account</b> or <b>Maintenance</b> screen, click the <b>New Service Request</b> button.</p>	 <p>Welcome Tommy Bahama</p> <p><a href="#">New Service Request</a></p> <p>My Contact Information <a href="#">View Detail</a> <a href="#">Edit</a>   My Open Service Requests <a href="#">View All</a></p> <table border="1"> <thead> <tr> <th>Home Phone</th> <th>SR #</th> <th>Date Created</th> <th>Action</th> </tr> </thead> <tbody> <tr> <td>Work Phone</td> <td>1</td> <td>02/15/2010</td> <td></td> </tr> <tr> <td>Mobile Phone</td> <td></td> <td></td> <td></td> </tr> <tr> <td>Email: john_kettles@yahoo.com</td> <td></td> <td></td> <td></td> </tr> </tbody> </table> <p>Conversations <a href="#">New Conversation</a></p> <p>No Conversations</p>	Home Phone	SR #	Date Created	Action	Work Phone	1	02/15/2010		Mobile Phone				Email: john_kettles@yahoo.com			
Home Phone	SR #	Date Created	Action														
Work Phone	1	02/15/2010															
Mobile Phone																	
Email: john_kettles@yahoo.com																	

<p>Fill in all the relevant fields:</p> <p><b>Building/Unit:</b> Displays your address.</p> <p><b>Specific Location:</b> Enter the location within your building or unit.</p> <p><b>Description:</b> Describe the issue.</p> <p><b>Requested By:</b> Displays your name.</p> <p><b>Email Address:</b> Shows your email.</p> <p><b>Primary Phone:</b> Choose or edit the contact phone number.</p> <p><b>Preferred Time to Enter:</b> Defaults to <b>Anytime</b>. You can also select a specific date and time.</p> <p><b>Attach Document:</b> Browse your computer for relevant files and attach the file to the request.</p>	
<p>Click the <b>Save</b> button to save and notify the management company via email.</p>	



### Important

If you leave a required field as blank, an error message is displayed. Correct the errors and click the **Save** button again.

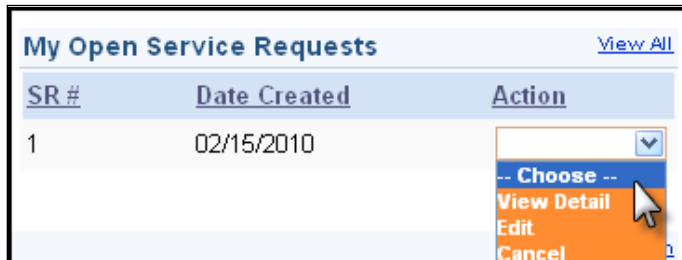


**You must correct the following errors:**

- Preferred Time to Enter is required
- Description is required

## Reviewing, Cancelling, and Editing Existing Service Requests

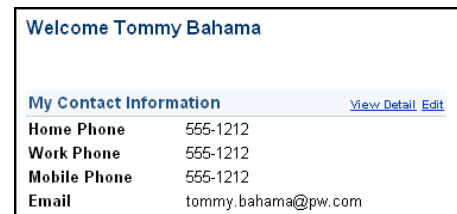
You can view your service requests in the **My Account** screen. You can also review, cancel, and edit the existing service requests. The **My Open Service Requests** portion of the **My Account** screen displays the SR # (service request number), the date the request is created, and provides an **Action** dropdown with options to review, edit, or cancel the transaction.



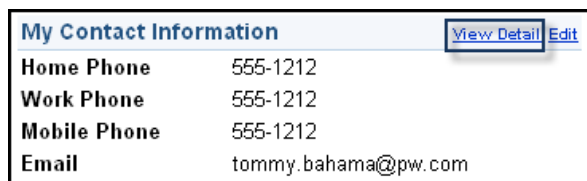
- **View Detail** option directs you to the **Maintenance** screen and lets you review the specifics of the service request.
- **Edit** allows you to edit the fields in the request.
- **Cancel** option cancels the request.

## Viewing the Contact Information

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

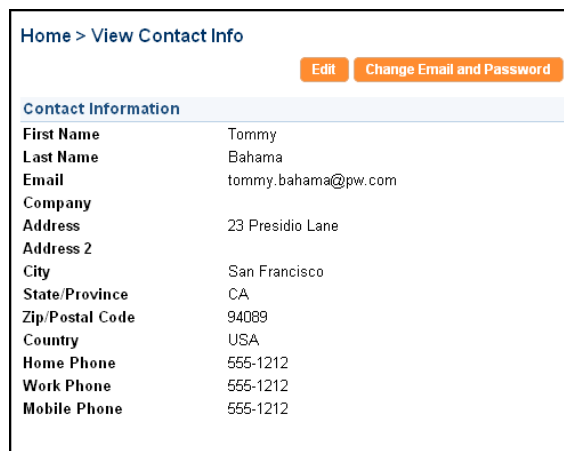


Click the **View Detail** link to view your contact information.



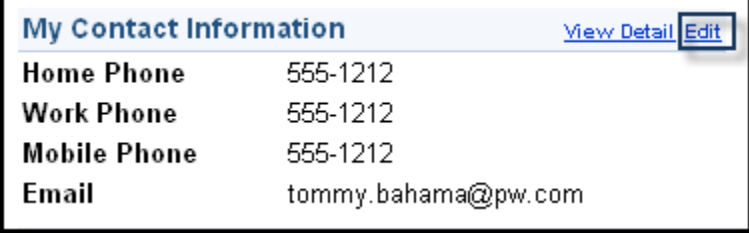
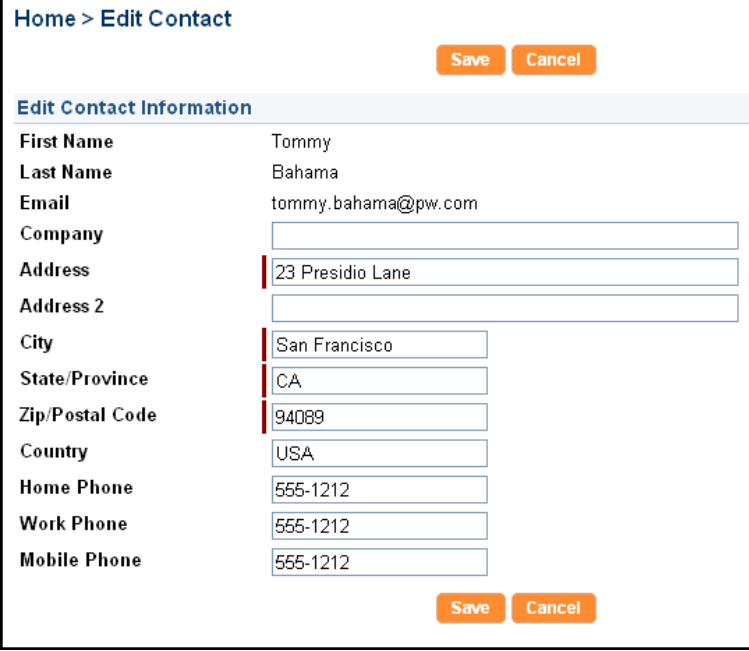

The following information is displayed:

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



## Editing the Contact Information

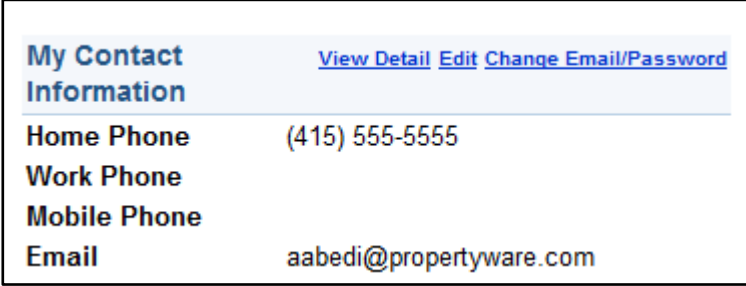
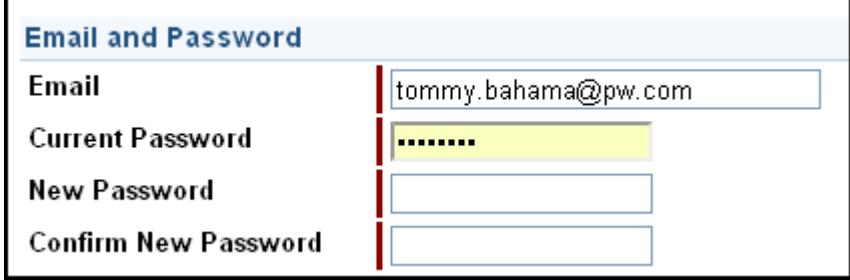

You can edit your contact information from the **My Account** screen.

Step	Action/Screen
<p>From the <b>My Account</b> screen, click the <b>Edit</b> link.</p>	 <p><b>My Contact Information</b> <a href="#">View Detail</a> <a href="#">Edit</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>
<p>Update the relevant fields.</p>	 <p>Home &gt; Edit Contact <span>Save Cancel</span></p> <p><b>Edit Contact Information</b></p> <p><b>First Name</b> Tommy  <b>Last Name</b> Bahama  <b>Email</b> tommy.bahama@pw.com  <b>Company</b> <input type="text"/>  <b>Address</b> 23 Presidio Lane  <b>Address 2</b> <input type="text"/>  <b>City</b> San Francisco  <b>State/Province</b> CA  <b>Zip/Postal Code</b> 94089  <b>Country</b> USA  <b>Home Phone</b> 555-1212  <b>Work Phone</b> 555-1212  <b>Mobile Phone</b> 555-1212 <span>Save Cancel</span></p> <p><b>Note:</b> The name cannot be changed. The email address can be changed but not from this view.</p>
<p>Click the <b>Save</b> button.</p>	 <p><span>Save Cancel</span></p>



## Changing the Email Address and Password

You can change the email address associated with your lease and password associated with the Tenant Portal from the **My Account** screen.

Step	Action/Screen
<p>From the <b>My Account</b> screen, click the <b>Change Email/Password</b> link.</p>	 <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> (415) 555-5555</p> <p><b>Work Phone</b></p> <p><b>Mobile Phone</b></p> <p><b>Email</b> aabedi@propertyware.com</p>
<p>Update the email address and password.</p>	 <p><b>Email and Password</b></p> <p><b>Email</b> <input type="text" value="tommy.bahama@pw.com"/></p> <p><b>Current Password</b> <input type="password" value="....."/></p> <p><b>New Password</b> <input type="password"/></p> <p><b>Confirm New Password</b> <input type="password"/></p> <p><b>Note:</b> The current password is automatically entered in its field.</p>
<p>Click the <b>Save</b> button.</p>	 <p><input type="button" value="Save"/> <input type="button" value="Cancel"/></p>

### Conversing with the Management Team

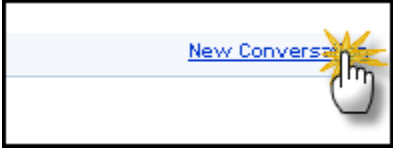

You or your management team can initiate conversations. All conversations are displayed at the bottom of the **My Accounts** screen.

Conversations		<a href="#">New Conversation</a>
<b>Tommy Bahama</b> 3/1/10 4:5:42 PM	<a href="#">Rent</a> Hi, Wanted to make sure you got my rent check.	1 Comment(s)

Both you and the management team are notified via email when a conversation is initiated. Conversations can be used to ask basic questions that fall outside the scope of a maintenance request. It provides you an easy way to communicate with your management team.

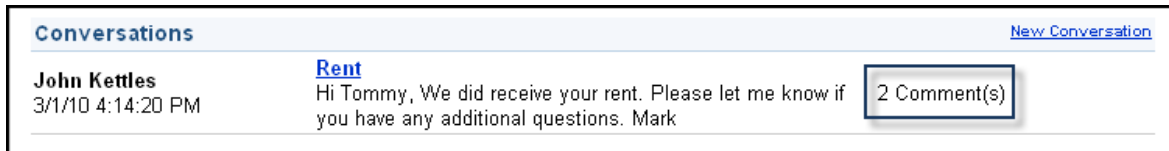
### Starting New Conversations

Both you and your management team can start a new conversation. You can start a conversation from the **My Accounts** screen.

Step	Action/Screen
Click the <b>New Conversation</b> link.	
Complete all of the fields.	<div data-bbox="472 1209 1430 1654"> <p><b>Lease &gt; New Conversation</b></p> <p><b>Edit Comment</b></p> <p style="text-align: right;"><b>Save</b> <b>Cancel</b></p> <p>Lease: 23 Presidio Lane - Active <input type="button" value="v"/></p> <p>Subject: <input type="text"/></p> <p>Description: <input type="text"/></p> <p style="text-align: right;"><b>Save</b> <b>Cancel</b></p> </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 <b>Save</b> button.	

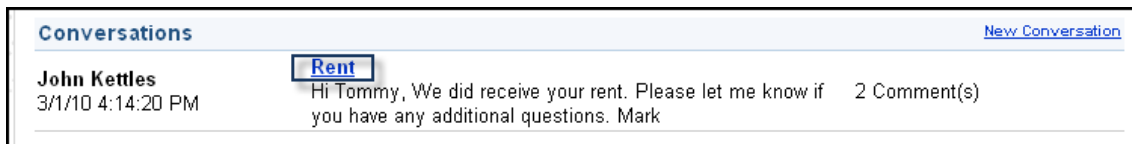
## Continuing Existing Conversations

All existing conversations appear in the **Conversations** section of the **My Accounts** screen. Each time a comment is added, the recipient is notified via email. You can view the number of comments on your **Conversations**.



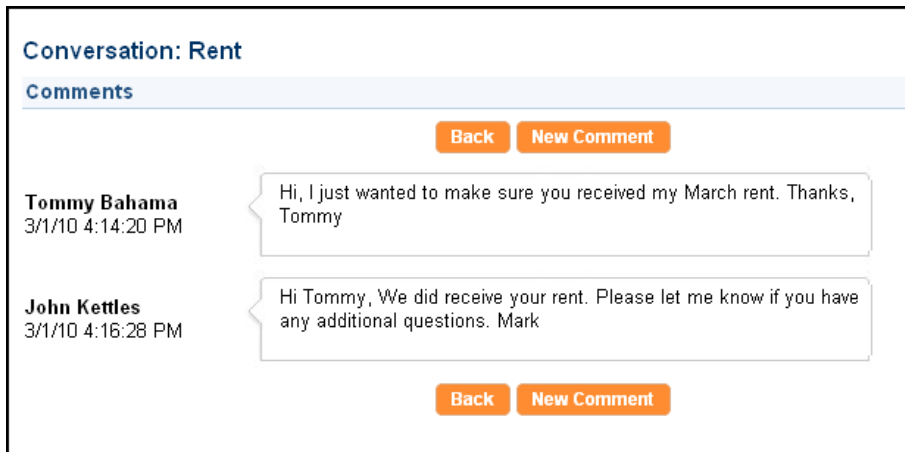
The screenshot shows a table-like view of conversations. The header includes 'Conversations' on the left and 'New Conversation' on the right. A row for 'John Kettles' dated '3/1/10 4:14:20 PM' is highlighted. The subject is 'Rent' and the message preview is 'Hi Tommy, We did receive your rent. Please let me know if you have any additional questions. Mark'. A box next to the message indicates '2 Comment(s)'.

Click the [Subject] link to launch the list of comments for review.



This screenshot is similar to the previous one, but the 'Rent' subject link is highlighted with a blue box, indicating it is the selected conversation.

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



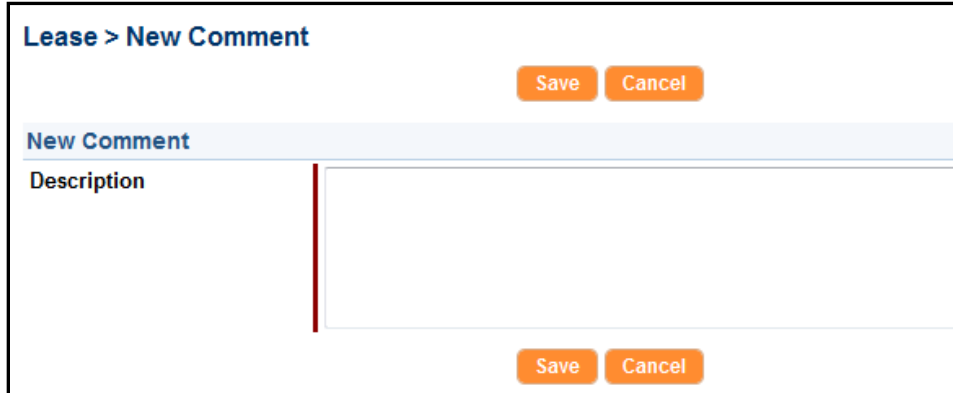
The screenshot shows a detailed view of a conversation titled 'Conversation: Rent'. Under the 'Comments' section, there are two messages. The first is from 'Tommy Bahama' (3/1/10 4:14:20 PM) with the text 'Hi, I just wanted to make sure you received my March rent. Thanks, Tommy'. The second is from 'John Kettles' (3/1/10 4:16:28 PM) with the text 'Hi Tommy, We did receive your rent. Please let me know if you have any additional questions. Mark'. Each message has 'Back' and 'New Comment' buttons next to it.

Click the **New Comment** button to reply.



A close-up of the 'Back' and 'New Comment' buttons. A mouse cursor is clicking on the 'New Comment' button, which is highlighted with a yellow starburst effect.

Type your comment in the **Description** textbox and click the **Save** button to post the conversation.



The screenshot shows a web form titled "Lease > New Comment". At the top right of the form are two orange buttons labeled "Save" and "Cancel". Below this is a light blue header bar with the text "New Comment". Underneath the header is a label "Description" on the left side, followed by a large, empty white text input area. At the bottom right of the form are two more orange buttons labeled "Save" and "Cancel".

## My Rentals

The **My Rentals** screen allows you to review the details of your lease(s). Each lease includes the following information:

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



My Account	My Rentals	Maintenance	Documents	Renter's Insurance		
<b>My Rentals</b>						
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 electronic payments, you can also manage electronic payments from the **My Rentals** screen.

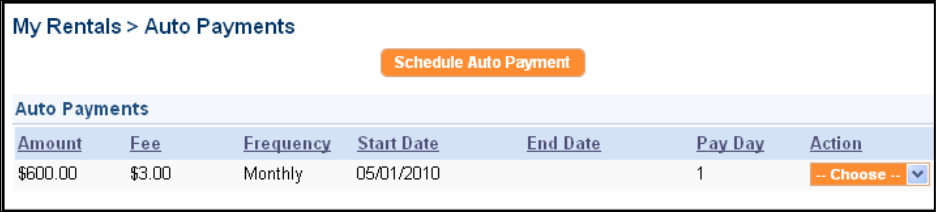
My Rentals						
<div style="border: 1px solid black; padding: 5px; display: inline-block;"> <span style="background-color: #f4a460; padding: 2px 10px; margin-right: 5px;">Make Payment</span> <span style="background-color: #f4a460; padding: 2px 10px; margin-right: 5px;">Payment Account</span> <span style="background-color: #f4a460; padding: 2px 10px;">Auto Payments</span> </div>						
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	<span style="background-color: #f4a460; padding: 2px 5px;">--- Choose ---</span> <input type="text"/>

## Setting up Auto Payments

You can also setup auto payments from the **My Rentals** screen.


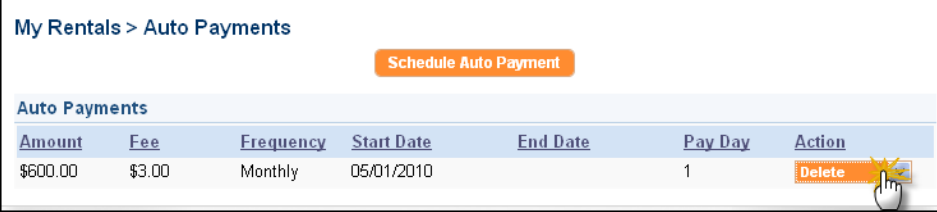
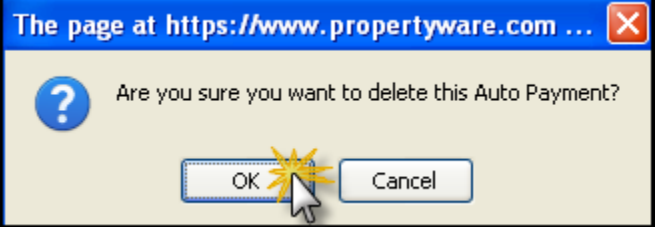
Step	Action/Screen										
Click the <b>Make Payment</b> button.											
Click the <b>Schedule Auto Payment</b> button.											
Complete all required fields.	<div data-bbox="483 882 1334 1339"> <p><b>My Rentals &gt; Auto Payments &gt; New</b></p> <p><b>Auto Payment Information</b></p> <p>Rental: 40 Cervantes Blvd Unit 1 - Active</p> <p>Amount: \$600.00 <small>A convenience fee of \$3.00 will be added to your payment.</small></p> <p>Start Date: 3/1/2010</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><small>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.</small></p> <p>Next Cancel</p> </div> <p><b>Note:</b> The convenience fee is displayed under the <b>Amount</b> field.</p>										
Confirm the total amount to be paid each month and click the <b>Save</b> button.	<div data-bbox="483 1512 1312 1827"> <p><b>Please Confirm Your Auto Payment</b></p> <p><b>Confirm Auto Payment</b></p> <table border="1"> <tr> <td>Rental</td> <td>40 Cervantes Blvd Unit 1 - Active</td> </tr> <tr> <td>Amount</td> <td>\$600.00</td> </tr> <tr> <td>Convenience Fee</td> <td>\$3.00</td> </tr> <tr> <td><b>Total Amount</b></td> <td><b>\$603.00</b></td> </tr> <tr> <td>Confirm Total Amount</td> <td>\$603.00</td> </tr> </table> <p><small>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.</small></p> <p>Previous <b>Save</b> Cancel</p> </div>	Rental	40 Cervantes Blvd Unit 1 - Active	Amount	\$600.00	Convenience Fee	\$3.00	<b>Total Amount</b>	<b>\$603.00</b>	Confirm Total Amount	\$603.00
Rental	40 Cervantes Blvd Unit 1 - Active										
Amount	\$600.00										
Convenience Fee	\$3.00										
<b>Total Amount</b>	<b>\$603.00</b>										
Confirm Total Amount	\$603.00										

You are directed to the **My Rentals > Auto Payments** screen, confirming that the payment has been set for recurring.




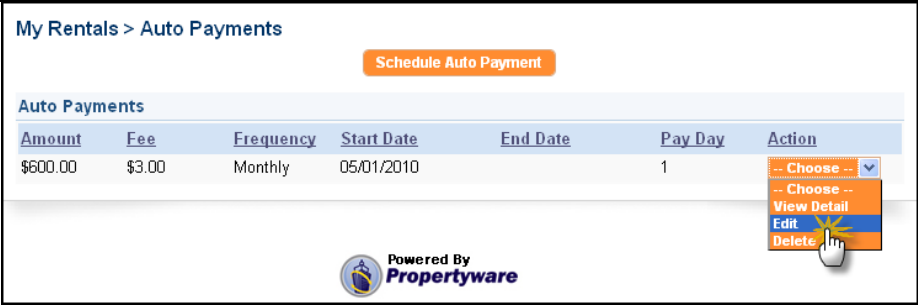
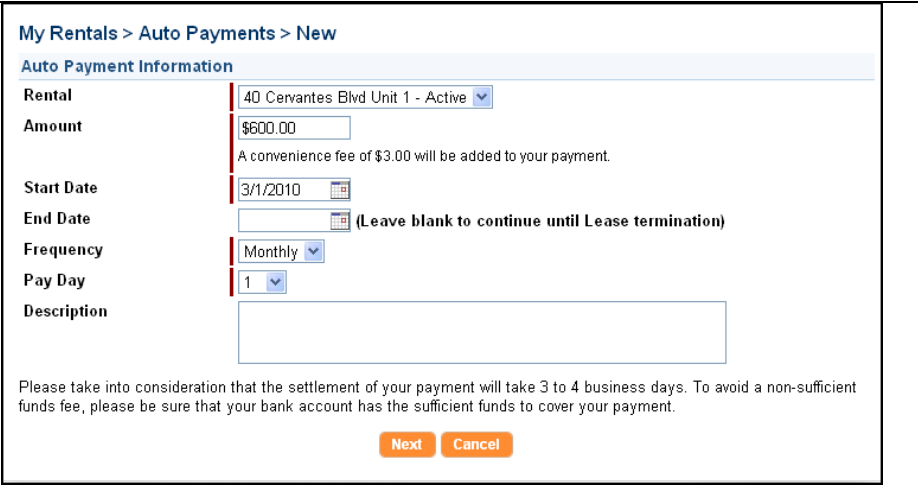
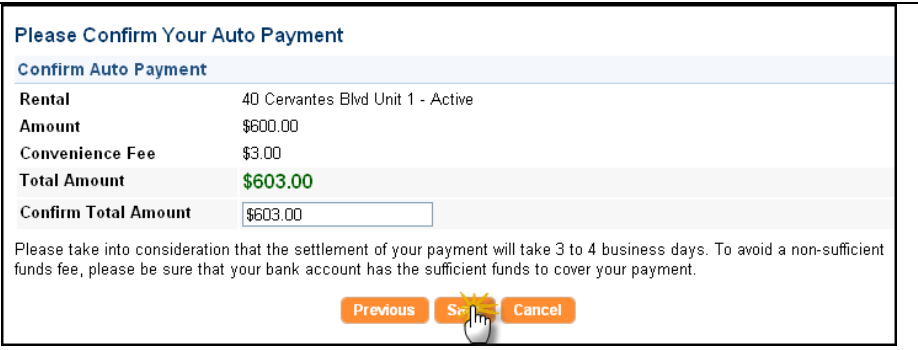
### Deleting Auto Payments

You can delete your auto payments at any time.

Step	Action/Screen
<p>From the <b>My Rentals</b> or <b>My Account</b> screen, click the <b>Auto Payments</b> button.</p>	
<p>Choose <b>Delete</b> from the <b>Action</b> dropdown.</p>	
<p>Click the <b>OK</b> button to confirm.</p>	

## Editing Auto Payments




You can edit your auto payments at any time.

Step	Action/Screen
<p>From the <b>My Rentals</b> or <b>My Account</b> screen, click the <b>Auto Payments</b> button.</p>	
<p>Click <b>Edit</b> from the <b>Action</b> dropdown.</p>	
<p>Fill out the required information.</p>	
<p>Confirm the total amount to be paid each month and click the <b>Save</b> button.</p>	



## Editing Payment Accounts

You can edit the account settings. You can edit credit card information for making payments or change your default payment option.

Step	Action/Screen
From the <b>My Rentals</b> screen, click the <b>Payment Account</b> button.	
Click the <b>Edit Payment Account</b> button.	
Select the radio button for the payment.	<div data-bbox="505 821 1203 1020">  </div> <p data-bbox="500 1066 1398 1140"><b>Note:</b> The selected radio button drives the default payment account. All payments are drawn from that account moving forward.</p>
Edit the account details.	<div data-bbox="505 1146 878 1728"> <p><b>E-Check</b></p> <p>Payment Method  <input checked="" type="radio"/> 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: Bank Of America            Account Type: Checking            Routing Number: 121000358            Account Number: 1234567</p> <p>XXXXXXXXXX            Routing Number    Account Number    Check Number</p> <p>Social Security #: 123-45-6789</p> <p>OR</p> <p>Drivers License #: <input type="text"/>            Drivers License State/Province: <input type="text"/></p> </div> <div data-bbox="943 1146 1365 1524"> <p><b>Credit Card</b></p> <p>Payment Method  <input type="radio"/> E-Check <input checked="" type="radio"/> Credit Card</p> <p>Card Number: XXXXXXXXXXXXXXX2            Card Verification: 011            Card Expiration: 1 - January 2011</p> </div>

## Viewing Lease Details

You can review your lease details from the **My Rentals** screen.

**My Rentals > 23 Presidio Lane** 1

Give Notice
Print

2 **Rental Detail**

<b>Address</b>	23 Presidio Lane in San Francisco, CA	<b>Move In Date</b>	02/16/2010
<b>Unit</b>	-	<b>End Date</b>	02/14/2011
<b>Status</b>	Active	<b>Start Date</b>	02/15/2010

3 **Tenant Ledger**

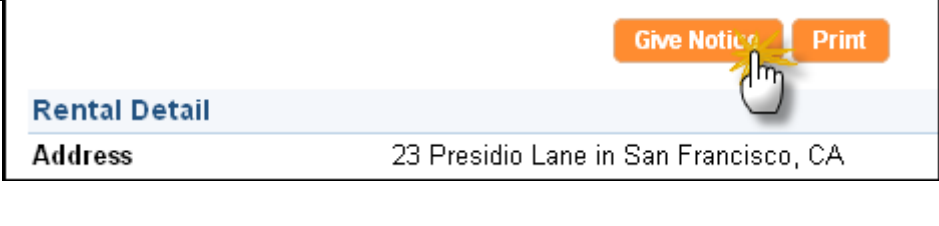
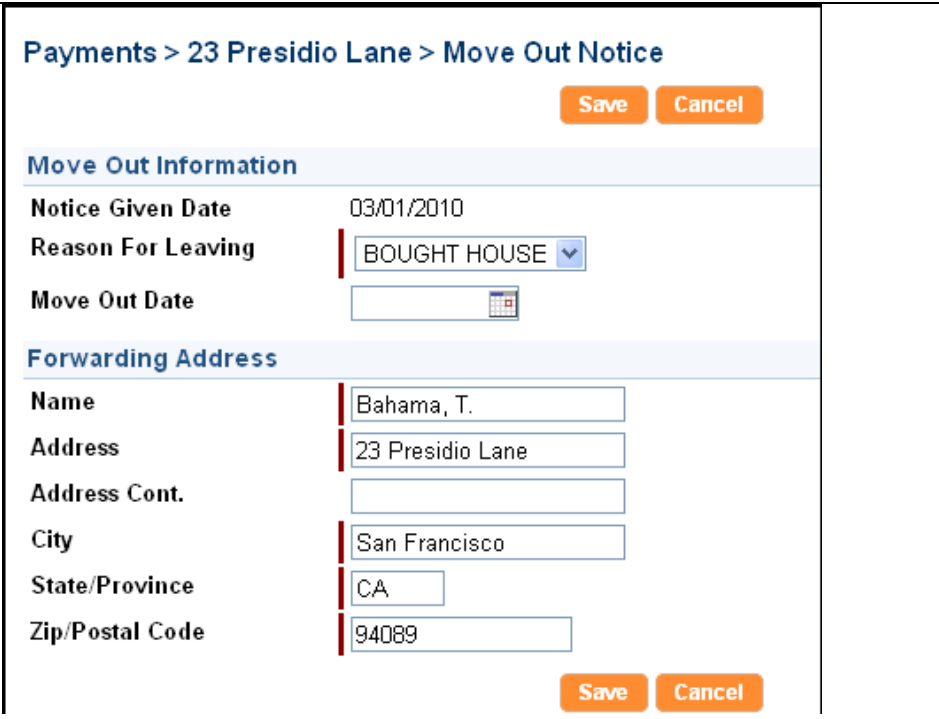

Total Unpaid <b>\$750.00</b>	Deposit Held <b>\$1,500.00</b>	Prepayments <b>\$0.00</b>
---------------------------------	-----------------------------------	------------------------------

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 a manual late fee since the earlier one was accidently 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		Prorated for 13 days	\$928.57	\$928.57

1. The **Give Notice** button allows you to give notice that you are moving out. The notice is given in real time. The **Print** button allows you to print a paper copy of your ledger.
2. The **Rental Details** section includes the address, status, move in, and lease start and end dates.
3. The **Tenant Ledger** is not always available depending on how your management team has setup the portals. The ledger includes the details of payments and adjustments on the lease, including deposits.

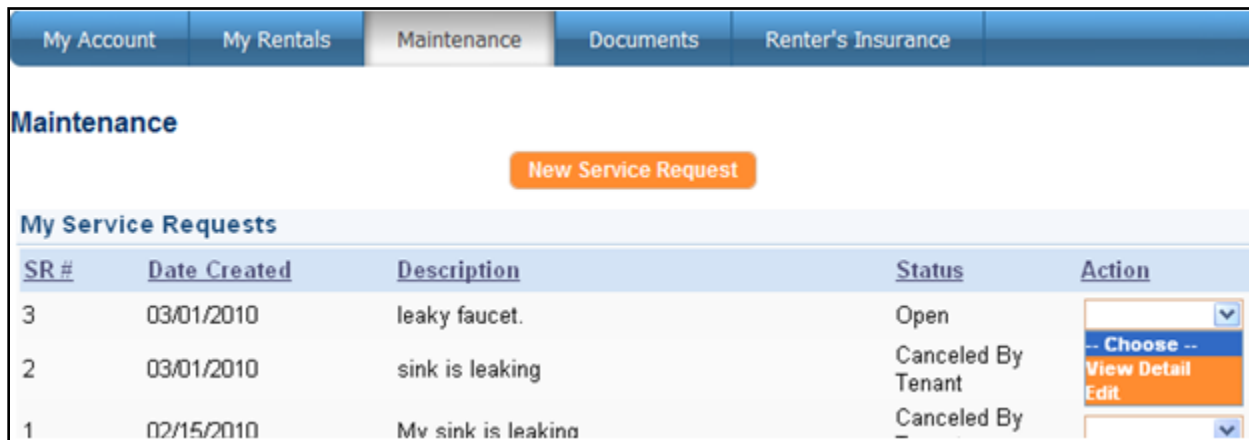
### Giving Notice

The **Give Notice** button allows you to notify your management that you are moving out. This feature automatically notifies the management team that you have given a notice.

Step	Action/Screen
<p>From the <b>My Rentals</b> screen, click the <b>Give Notice</b> button.</p>	
<p>Complete all relevant fields.</p>	
<p>Click the <b>Save</b> button.</p>	

## Maintenance

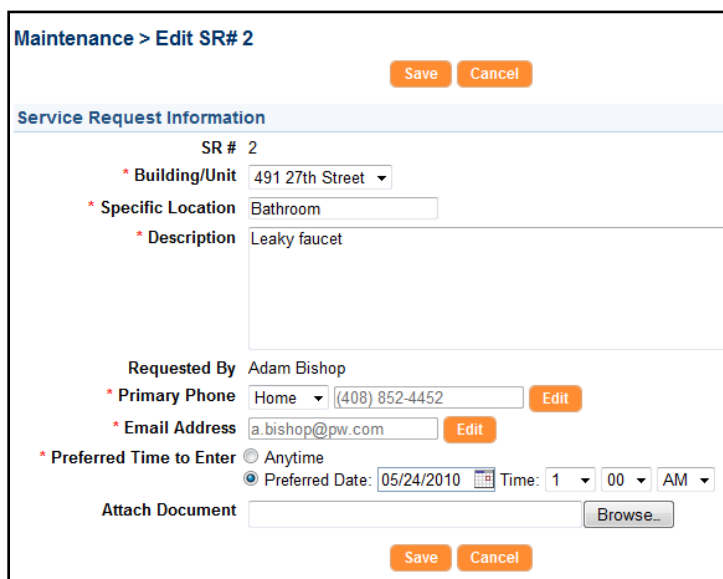
The **Maintenance** screen allows you to view both open and closed service requests, edit current requests, and open a new service request. The requests are listed in chronological order with the most recent requests at the top.



SR #	Date Created	Description	Status	Action
3	03/01/2010	leaky faucet.	Open	<input type="button" value="New Service Request"/> -- Choose -- <input type="button" value="View Detail"/> <input type="button" value="Edit"/>
2	03/01/2010	sink is leaking	Canceled By Tenant	
1	02/15/2010	Mv sink is leaking	Canceled By	

The **Status** field displays open, closed, or cancelled requests. If you need more details, select **View Details** from the **Action** dropdown. The **Edit** button is available in the dropdown for **Open** requests.

To make changes to an existing service request, choose **Edit** from the **Action** dropdown.



**Maintenance > Edit SR# 2**

Save Cancel

**Service Request Information**

SR # 2

\* Building/Unit 491 27th Street

\* Specific Location Bathroom

\* Description Leaky faucet

Requested By Adam Bishop

\* Primary Phone Home (408) 852-4452 Edit

\* Email Address a.bishop@pw.com Edit

\* Preferred Time to Enter
   
 Anytime
   
 Preferred Date: 05/24/2010 Time: 1 00 AM

Attach Document Browse...

Save Cancel

Click the **Save** button to update the changes you have made to the service request.



To open a new service request, click the **New Service Request** button. You need to fill out the required fields and describe your maintenance request. You can also browse your computer and attach a document or screenshot to the request.

## Documents

Use the **Documents** tab to view building, lease, or other important documents shared by your management team.

When a new document is uploaded to the Tenant Portal, you receive an email notification. Click the **Documents** tab to see a link to the document along with its size, date uploaded, and the name of the person who uploaded the document. To open the document, click the link.

**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
 <a href="#">System_Notes_Jkettles.docx</a>	438k	2/16/2010	jkettles



**Note**

You need the appropriate software installed on your computer to view the document.