Tenant Portal Guide

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

Last Name

Email

Address

Address 2

City

State/Province

Zip/Postal Code

Comments

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.

Tenant Portal Navigation Tabs

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

My Account	My Rental	Maintenance	Documents	Renter's Insurance

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.
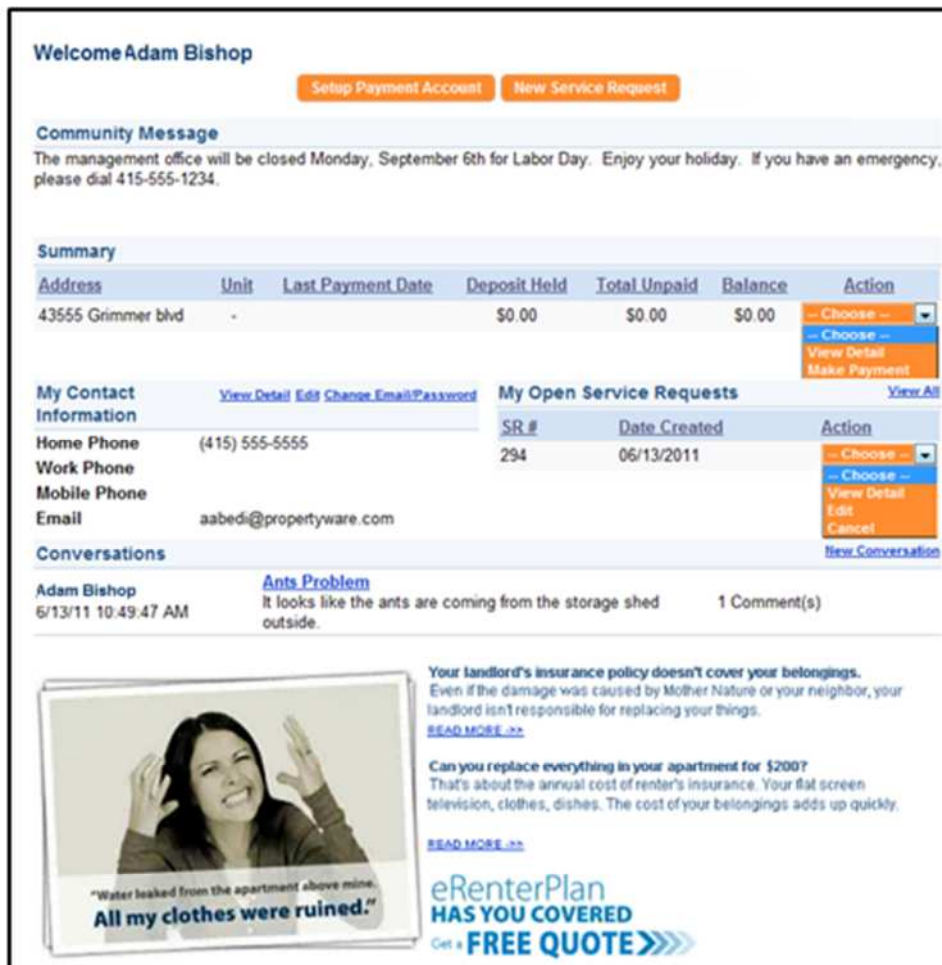
Home | Help | Logout

- **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.

Making a One-Time Payment

This option is available only if the management team has activated electronic payment. First you need to setup your payment account. The tenant portal can be set to accept automatic checking (E-Check) or credit card payments, or both. The payment methods depend upon how the management team has set up the electronic payment options for the lease.

From the **My Account** screen, click the **Setup Payment Account** button to enter your E-Check or Credit Card information.	Setup Payment Account
Select your payment method.	**Payment Method** ⦿ ACH E-Check ○ Credit Card **Note:** You can store both credit card and E-Check information. The selected radio button determines the payment method that is used as the default method.
If you select the **E-Check** radio button, you can enter either your driver's license or Social Security number for verification purposes.	**Payment Method** ⦿ ACH E-Check ○ Credit Card Please enter your bank account information exactly as it appears on your check. ACH payments submitted without accurate routing and account numbers will be not be processed and subject to a non-sufficient funds fee. Bank Name Account Type: Checking Routing Number Account Number ⑈000067694⑈ 123456789⑈ 1001 Routing Number Account Number Check Number Social Security # OR Drivers License # Drivers License State/Province **Billing Information** ☐ Same as Contact Billing Address Address 2 City State/Province Zip/Postal Code Billing Email **Note:** The system verifies that the routing number is an active routing number. Always, double-check the account number to make sure you have entered the correct information. Failure to enter the correct information can result in a returned check.

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

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

Step	Action/Screen
Choose the **Make Payment** option from the dropdown **Action** menu or click the **Make Payment** button from the **My Account** screen.	
Enter the payment amount and click the **Next** button.	 **Note:** Enter the conveneince fee associated with ePayment. The transaction may take 1-4 business days depending on the transaction type.

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)* 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. 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.
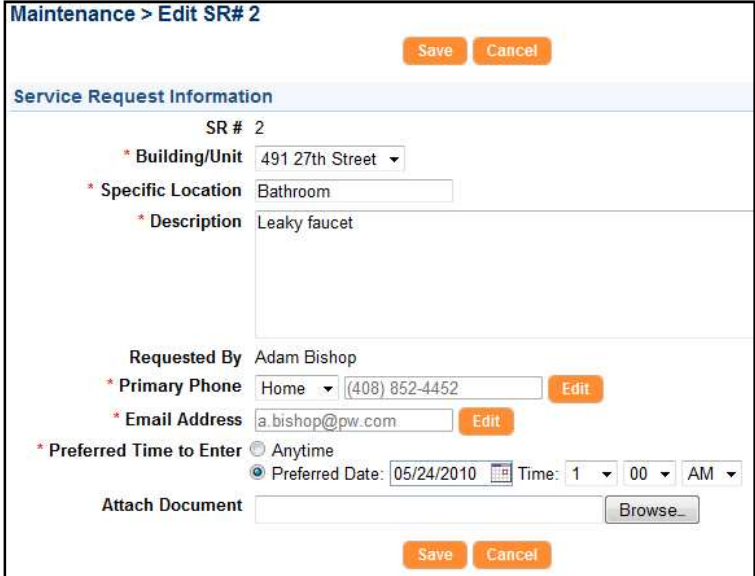
Step	Action/Screen
From the **My Account** or **My Rental** screen, click the **Make Payment** button.	Welcome Mrs. Allison West [Make Payment] [New Service Request] [Auto Payment]
Click the **Schedule Auto Payment** button.	My Rentals > Auto Payments [Schedule Auto Payment]

Complete all required fields.	**My Rentals > Auto Payments > New** **Auto Payment Information** Rental 40 Cervantes Blvd Unit 1 - Active Amount $600.00 A convenience fee of $3.00 will be added to your payment. Start Date 3/1/2010 End Date (Leave blank to continue until Lease termination) Frequency Monthly Pay Day 1 Description 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:** The convenience fee is displayed under the **Amount** field.
Confirm the total amount to be paid each month and click the **Save** button.	**Please Confirm Your Auto Payment** **Confirm Auto Payment** Rental 40 Cervantes Blvd Unit 1 - Active Amount $600.00 Convenience Fee $3.00 Total Amount $603.00 Confirm Total Amount $603.00 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. **Previous** **Save** **Cancel**

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
From the **My Account** or **Maintenance** screen, click the **New Service Request** button.	**Welcome Tommy Bahama** **New Service Request** **My Contact Information** View Detail Edit **My Open Service Requests** View All Home Phone SR # Date Created Action Work Phone 1 02/15/2010 Mobile Phone Email john_kettles@yahoo.com **Conversations** New Conversation No Conversations

Fill in all the relevant fields: **Building/Unit**: Displays your address. **Specific Location**: Enter the location within your building or unit. **Description**: Describe the issue. **Requested By**: Displays your name. **Email Address**: Shows your email. **Primary Phone**: Choose or edit the contact phone number. **Preferred Time to Enter**: Defaults to **Anytime**. You can also select a specific date and time. **Attach Document:** Browse your computer for relevant files and attach the file to the request.	Maintenance > Edit SR# 2 **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…
Click the **Save** button to save and notify the management company via email.	Save Cancel

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⚠ **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.
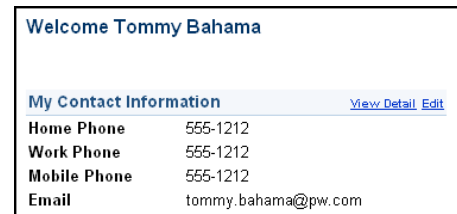
Click the **View Detail** link to view your contact information.
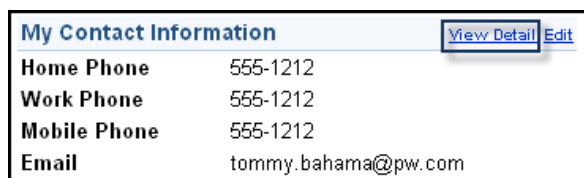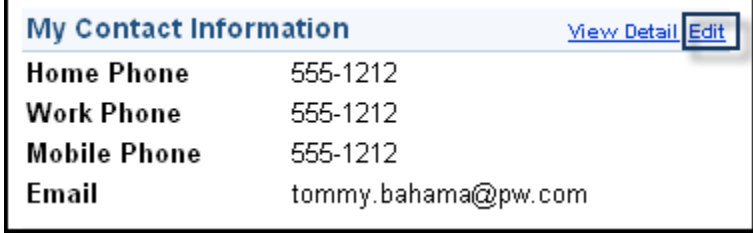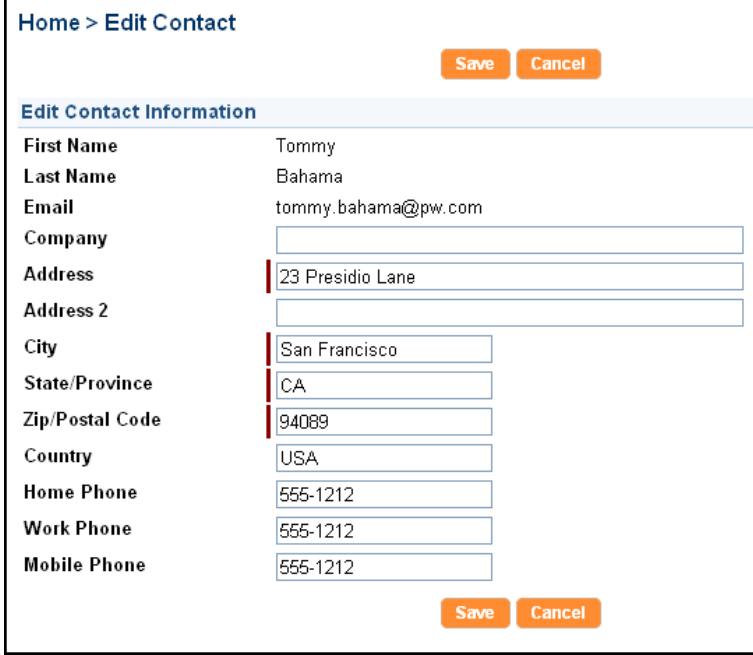
The following information is displayed:
- First name
- Last name
- Email
- Company
- Address
- Home Phone
- Work Phone
- Mobile Phone
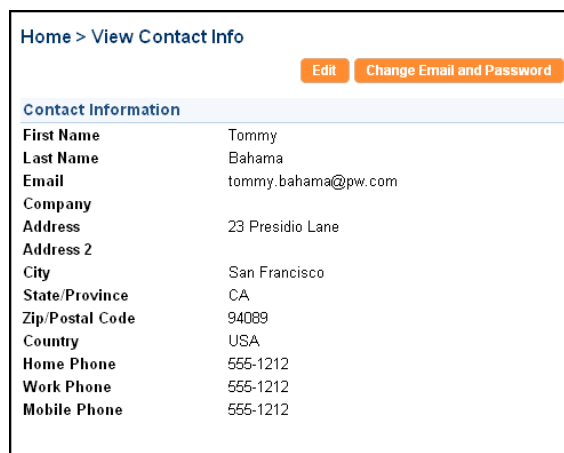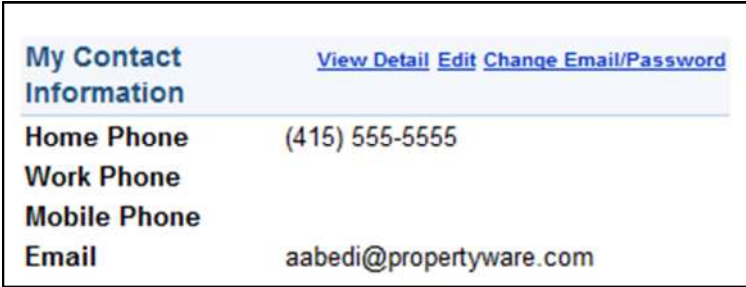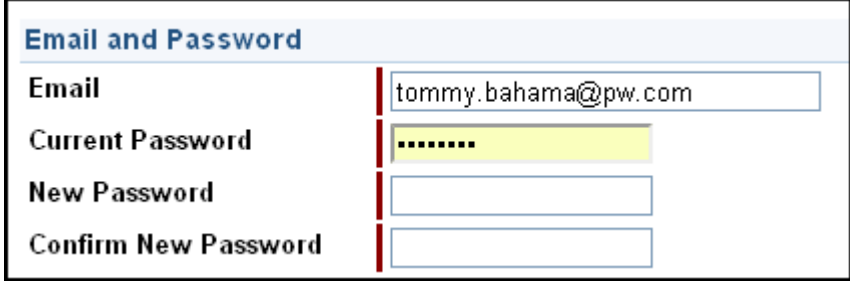
Editing the Contact Information

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

Step	Action/Screen
From the **My Account** screen, 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.	

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
From the **My Account** screen, click the **Change Email/Password** link.	**My Contact Information** View Detail Edit Change Email/Password **Home Phone** (415) 555-5555 **Work Phone** **Mobile Phone** **Email** aabedi@propertyware.com
Update the email address and password.	**Email and Password** **Email** tommy.bahama@pw.com **Current Password** •••••••• **New Password** **Confirm New Password** **Note:** The current password is automatically entered in its field.
Click the **Save** button.	Save Cancel

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		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 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 form the **My Accounts** screen.

Step	Action/Screen
Click the **New Conversation** link.	New Conversation
Complete all of the fields.	**Lease > New Conversation** **Edit Comment** Save Cancel Lease 23 Presidio Lane - Active Subject Description Save Cancel 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.	Save Cancel

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 **Conversation**s.

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

The comments are listed in chronological order, starting with the original comment on top.
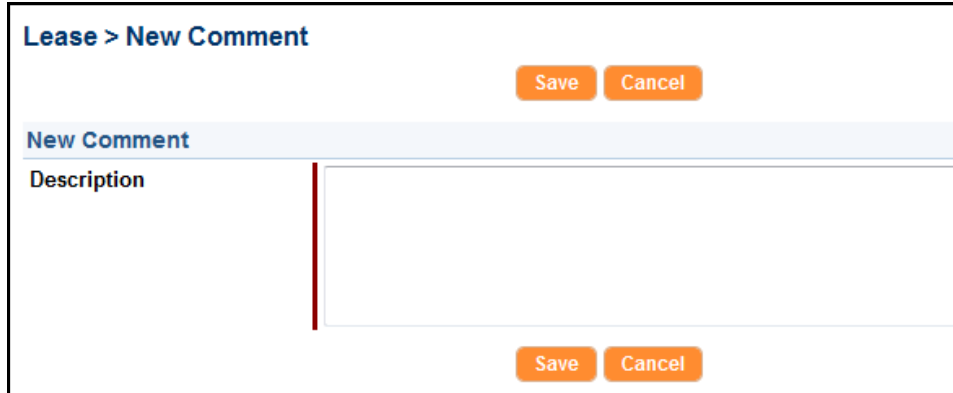
Click the **New Comment** button to reply.

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

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

If the management team has enabled electronic payments, you can also manage electronic payments from the **My Rentals** screen.

Setting up Auto Payments

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

Step	Action/Screen
Click the **Make Payment** button.	Welcome Mrs. Allison West Make Payment New Service Request Auto Payment
Click the **Schedule Auto Payment** button.	My Rentals > Auto Payments Schedule Auto Payment
Complete all required fields.	My Rentals > Auto Payments > New **Auto Payment Information** Rental — 40 Cervantes Blvd Unit 1 - Active Amount — $600.00 A convenience fee of $3.00 will be added to your payment. Start Date — 3/1/2010 End Date — (Leave blank to continue until Lease termination) Frequency — Monthly Pay Day — 1 Description — 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:** The convenience fee is displayed under the **Amount** field.
Confirm the total amount to be paid each month and click the **Save** button.	**Please Confirm Your Auto Payment** **Confirm Auto Payment** Rental — 40 Cervantes Blvd Unit 1 - Active Amount — $600.00 Convenience Fee — $3.00 Total Amount — **$603.00** Confirm Total Amount — $603.00 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. Previous Save Cancel

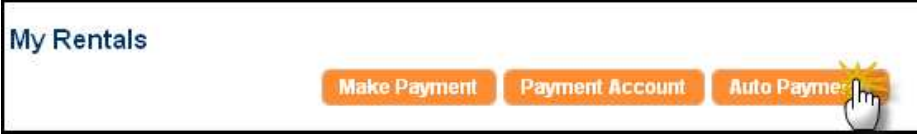| You are directed to the **My Rentals** > **Auto Payments** screen, confirming that the payment has been set for recurring. | |
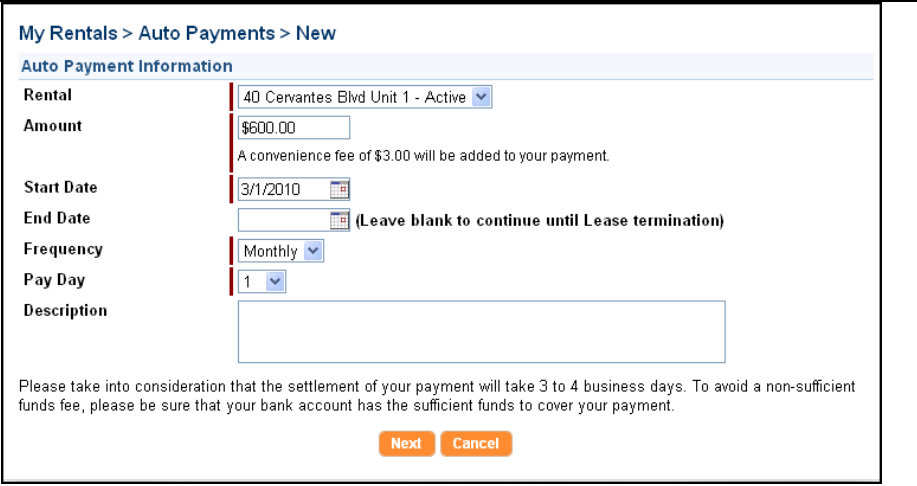
Deleting Auto Payments

You can delete your auto payments at any time.

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

Editing Auto Payments

You can edit your auto payments at any time.

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

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 **My Rentals** screen**,** click the **Payment Account** button.	My Rentals Make Payment Payment Account Auto Payment
Click the **Edit Payment Account** button.	My Rentals > Payment Account Edit Payment Account
Select the radio button for the payment.	**Payment Method** ○ ACH E-Check ○ Credit Card **Note:** The selected radio button drives the default payment account. All payments are drawn from that account moving forward.
Edit the account details.	**E-Check** Payment Method ○ ACH E-Check ○ Credit Card Please enter your bank account information exactly as it appears on your check. ACH payments submitted without accurate routing and account numbers will be not be processed and subject to a non-sufficient funds fee. Bank Name Bank Of America Account Type Checking Routing Number 121000358 Account Number 1234567 Routing Number Account Number Check Number Social Security # 123-45-6789 OR Drivers License # Drivers License State/Province **Credit Card** Payment Method ○ ACH E-Check ○ Credit Card Card Number XXXXXXXXXXXXXX2 Card Verification 011 Card Expiration 1 - January 2011

Viewing Lease Details

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

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
From the **My Rentals** screen, click the **Give Notice** button.	
Complete all relevant fields.	
Click the **Save** button.	

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.
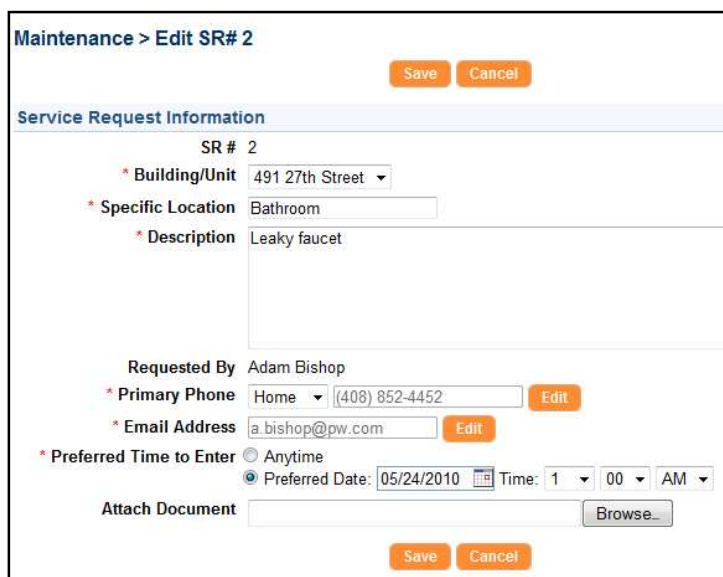

The **Status** field displays open, closed, or cancelled requests. If you need more details, select **View Details** from the **Action** dropdown. The **Edit** button is available in the dropdown for **Open** requests.

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

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.

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

Renter's Insurance

The **eRenterPlan** insurance program includes an insurance marketing banner in **My Account** screen. This banner is always visible unless an active policy is recorded for your lease.

The marketing banner contains information on why Renter's Insurance is important and specific information on eRenterPlan insurance. It also includes a special link to obtain a free quote from eRenterPlan. You receive a quote within minutes of clicking the **Get a Free Quote** link.

When you click the link, a pop-up notification is displayed to let you know that you are leaving the portal website.

Select the insurance policy options you are interested in including personal property coverage, deductible (if available), and optional coverage to complete the request for a pre-approved quote.

Click the **Enroll On-Line Now** button at the bottom of the page to complete the purchase online. You can also call the Customer Service Center at (888) 205-8118.

Note
Referral fees for leads are earned only when you complete the purchase online. If you elect to call the toll-free number to purchase insurance, eRenterPlan cannot link the lead to your property.

Enrolling in Renter's Insurance

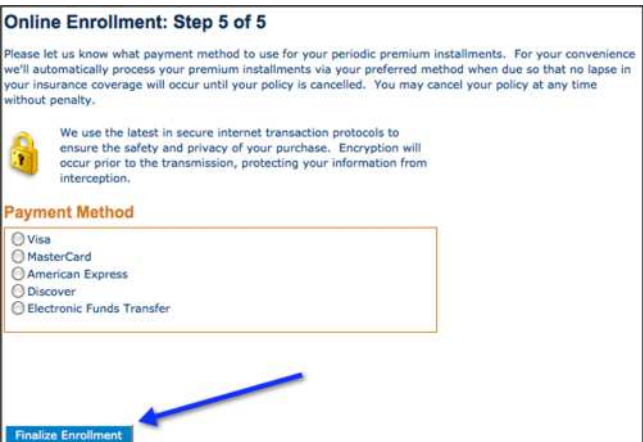| Step	Action
Provide your personal information. The eRenterPlan auto completes the information for this step. If the information is not available in **Online Enrollment** fields, you need to enter it. Click the **Continue to Step 2** button to proceed.	**Online Enrollment: Step 1 of 5** Tell us about yourself, your spouse, and your roommates. * First Name: Ann * Last Name: Ruiz Additional Occupant(s): First Name / Last Name Ann / Ruiz Michael / Ruiz Daytime Tel#: (415) 556-6652 Home Tel#: * Email Address: d.ruiz@pw.com * Confirm Email Address: We need to know the name of the primary insured occupant for this apartment. Please include all additional occupants over the age of 18 in the Additional Occupants section. This will ensure that coverage is extended to all occupants of this location. *Required Fields Continue to Step 2 >>
The address information is also filled automatically from your database in Propertyware. eRenterPlan checks that against the USPS database. You can update the street address but not the city, state, and zip code. Click the **Continue to Step 3** button to proceed.	**Online Enrollment: Step 2 of 5** Tell us the address of your apartment or home . Optionally you can provide a separate mailing address for anything we need to mail you regarding your eRenterPlan policy. Insured Names: Ann Ruiz Ann Ruiz Michael Ruiz *Insured Location: 14 Robinhood Drive City, State, Zip: Novato / CA / 94945 Mailing Address: Line 1: (If different than insured location) Line 2: City: State: Zip Code: * Required Fields Continue to Step 3 >>
Enter Policy Effective Date and Payment Plan. You need to select an effective date and payment plan. You can choose monthly, quarterly, semi-annual, or annual. Click the **Continue to Step 4** button to proceed.	**Online Enrollment: Step 3 of 5** Policy Effective Date and Premium Payment Term Insured Names: Ann Ruiz Ann Ruiz Michael Ruiz City, State, Zip: 14 Robinhood Dr # Novato, CA 94945-3408 ZIP+4 was changed Mailing Address: None specified (If different than insured location) * Policy Effective Date: 5/19/2011 at 12:01 a.m. PST. * Payment Period: Monthly: 12 Installments of **$23.00** Quarterly: 4 Installments of **$66.00** Semi-Annual: 2 Installments of **$132.00** Annual: 1 Installment of **$264.00** ** Monthly payments using a credit card, debit card, or ACH include a monthly processing fee of $1.00. * Required Fields Continue to Step 4 >>

TRAINING

Confirm and accept the Privacy Policy and Effective Date of Acknowledgement. Effective date can be the date of your move in or you can start the policy on the next business day. If you choose your move-in-date as the effective date, you also have to confirm that you have not suffered losses prior to that date. Click **Accept and Continue** button to proceed.	
Select the payment type and click the **Finalize Enrollment** button to complete the process.	

Note
Questions and inquiries about the policy and making claims should be directed to eRenterPlan Insurance. You receive a welcome email with contact information and a link for managing your policy online and customer service.

Viewing Enrollment Confirmation Email

Once you have enrolled, you receive a confirmation email as shown below:

Joe Resident

Subject: eRenterPlan Insurance Confirmation
Attachments: 20110519115546604O1042.pdf

eRenterPlan
INSURANCE FOR APARTMENT RESIDENTS

Stuff Happens. **Be Prepared!**

home | about us | contact us

Expect the unexpected. **Protect you and your stuff today.**

Insurance Confirmation
Our office has received, and submitted your request for a renters insurance policy. We appreciate your business and look forward to serving you. Please call us with any questions that you might have.
A confirmation of your policy request is available on-line at the following URL;
Insurance Confirmation

You can access your account online 24/7 from eRenterPlan.com. Please Click Here for Login Instructions.
Privacy Notice
You have received this notice because you are a customer of LeasingDesk Insurance Services, have provided us with your email address, and consented to receive electronic communications from us. As required by law, LeasingDesk Insurance Services is providing you notice ("Privacy Notice") of our privacy practices. Specifically, Title V of the Gramm-Leach-Bliley Act (15 U.S.C 6801 et seq.) requires LeasingDesk Insurance Services to deliver its Privacy Notice to consumers at their formation of the customer relationship with LeasingDesk Insurance Services, and to its customers annually. The Privacy Notice which describes how LeasingDesk Insurance Services protects and safeguards your non-public personal information, may be view here: Privacy Notice.
LeasingDesk Insurance Services
36 Discovery
Suite 220
Irvine CA 92618
1-888-205-8118

Free Auto Insurance Quote
LeasingDesk Insurance Services now offers competitive Auto Insurance quotes. Get the coverage you need at the price you deserve. Start saving, 1-**866-685-6967** for a free quote or click here to submit your information to our agents electronically

Viewing Policy Details on the Portal

The **Renter's Insurance** screen contains information about your policy purchased through eRenterPlan. If the property management team elects to record policies purchased through a third party, information on that policy is also available. Information remains available until it is deleted, even on expired or cancelled policies.

The **Policy Docs** displays the Policy Confirmation Document for policies purchased through the eRenterPlan interface. For policies purchased through third parties, the link displays the proof of coverage document you have sent to the property manager.

An example of the eRenterPlan Policy Confirmation document is given below.

eRenterPlan

Mailing Address:
P.O. Box 17478, Irvine, CA 92623-7478
Customer Service: **1-888-205-8118**
M-F 6:30am PST to 5:30pm PST

Confirmation
Notice Date: 5/13/2011

932231

Name and Address of Insured:	Additional Insured(s):
ANN ALLYN 1390 Santa Alicia Ave Chula Vista, CA 91913-1850	Any new resident must be added to the policy in order to be eligible for coverage. Residents can be added or removed by logging onto http://www.eRenterPlan.com

Mailing Address:	Policyholder Contact Information:
	Telephone #: Email Address: a.allyn787@gmail.com

Policy Summary:

Policy Number:	0030460020
Effective Date:	05/16/2011 12:01 AM CST

Coverage	Limit
Personal Property Coverage	$30,000
Additional Living Expenses	
Personal Liability Coverage	$100,000
Medical Payments to Others	$1,000
Deductible:	$250

Insurance Company:

Insurance Company:	American Modern Home Insurance Company Amelia, OH
Claims (Toll Free):	1-800-375-2075
NAIC#:	
Agent:	Leasingpesk Insurance services
Lic#:	0D12126

Optional Coverages:
-

Premium Installments:
Your credit/debit card will be charged Monthly for your period premium installments. Estimated billing dates are as follows: the 29th of each month.

Important Information
Unless otherwise provided, this policy contains a $1,000 deductible for all Wind and Hail losses.

Insuring Agreement:
Your complete policy will be mailed to you via U.S. Mail within 15 days. The policy is your contract for insurance, not the Insurance Election Form or this Confirmation of Insurance. Please review all information closely for accuracy when received. The information given here is only a summary of coverage to be provided to you by this policy.

Policy Cancellation:
Your policy will NOT automatically terminate when you move-out. You must inform us of your cancellation in writing to avoid any further premium being billed to you or deducted from your account. You may also cancel your policy on-line at http://www.eRenterPlan.com.

Notice of Cancellation:
Your leasing office or apartment community manager may be notified of any notice of cancellation or non-renewal of your policy.

Premium Installment Charges:
If you have chosen to have your periodic premium installment payments debited from your bank account or credit card, please note that these periodic installments will be charged to your account roughly 7 to 14 days prior to your installment due date. This is for your protection and allows us sufficient time to notify you in writing in the event your account is closed or your credit card is declined by your issuing bank.

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