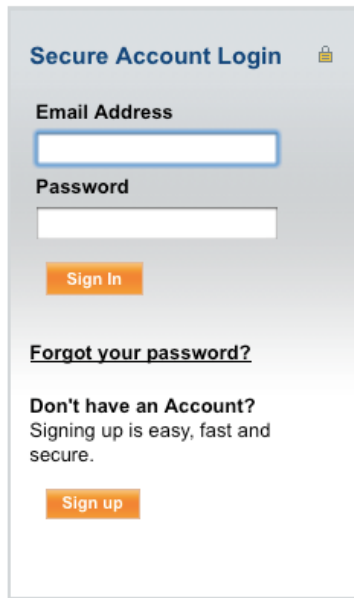# Owners Handbook

Online Access: The Owner Portal

Access real-time information regarding your rental properties online from our owner portal. This convenient service allows you to view your statements online, communicate with the management team and much more.

Logging into the Owner Portal

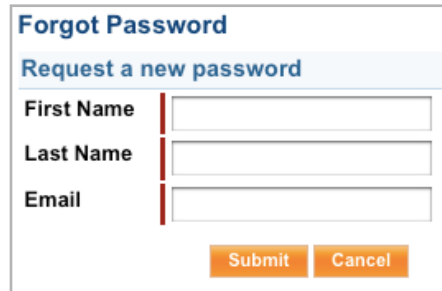You will receive an email from the management team that includes instructions for how to log into your owner portal. If you have not received a username and password, contact your property manager for this information.

In the event that you have lost or forgotten your password, it can retrieved from the login page by clicking the Forgot Your Password link. You will need to then enter the email address that your property manager has on file to retrieve the password associate with the account. If the email you have entered matches the one on file, your password will be emailed to you.

My Account Page

This is the initial screen of the owner portal summary screen that displays important alerts for unpaid bills and work orders that require approval. From this My Account page your owner can:

- View Alerts for Unpaid Bills and Work Orders that require an approval
- Update their contact information

- Add a payment profile to their account for electronic debits and credits
- Change their login information
- Communicate with their management team using the conversations feature

Updating Contact Info and Password in the Owner Portal

Your owner can update their contact information and change their password by following these steps:

1. From the My Account page, click the View Detail link that appears on the right side of the screen on the My Contact Information section.
2. The ensuing page displays the same information that appears on the owner contact record in your Propertyware account. You can update this information by clicking the Edit button.
3. Click the Change Email and Password button

4. Your email address is your username for logging into your account. You can update from this screen.

5. Enter your existing password in the Current Password field. To create a new password, enter it in both the New Password and Confirm New Password fields. Click the Save button to submit your changes.

Once you have saved your changes you will be returned to the View Contact Info screen.

Conversations in the Owner Portal

Your owner portal include a convenient feature that allows you to view conversations related to the management of your rentals. The conversations feature of the owner portal provide you with a central location to communicate with your property manager, without the headaches of lost or slow responding emails. The Conversations section of the owner portal displays:

- Conversations between your property managers and tenants
- Conversations directly with your property manager

The table above displays only active conversations. The column on the left displays the last person to make a comment (yourself, property manager or the tenant) and the date/time it was posted.

Conversations between your property manager and the tenant are in Read Only mode. This means you can view the conversation as it happens, but cannot participate. Alternatively, you can actively participate in conversations between yourself and the property manager.

To start a new conversation

1. Click the New Conversation link
2. Enter a subject and description for the conversation
3. Click the Save button
4. Click the New Comment button to add a comment to the conversation
5. Click the Back button to return to the list of conversations

To view the detail of any conversation:

1. Click the link which is the subject of the conversation
2. The resulting page displays the threaded comments in the conversation
3. Click the New Comment button to add a comment to the conversation
4. Click the Back button to return to the list of conversations

Anytime a conversation has been created or updated with a new comment, the participants will be notified immediately with an email.

Viewing Owner Statements

The Statements section of the Owners Portal allows you to:

- View Owner Statements you have Published to the Owner Portal
- View Owner Draws and Contributions
- Pay Outstanding Balances Electronically

  *Requires you to configure a electronic payment method

Viewing a Published Owner Statements

Your statements are made available for you to view anytime online from anywhere, anytime. To view your statements:

1. Click the Statements Tab.
2. Any published statements will appear in the Statements Table at the top of the page.
3. To view the Owner Statement, click the View option from the Actions dropdown menu
4. The Owner Statement will appear in a separate window as an Adobe PDF document.

If your computer does not have Adobe Acrobat installed, you will need to download it from: http://get.adobe.com/reader/

Saving the Planet, One Owner Statement at a Time.

The climate crisis is on all our minds these days. The risk of increasing global warming and the effects on the world we leave behind for future generations is enough motivation for individuals and businesses to change their behaviors to save the planet. We are doing our part be reducing our carbon footprint by making your owners statements available online.

Did you know that the average property manager uses 10,000 sheets of paper per year. Moreover, less than 10% of the over 12 million tons of paper used in the US each year is recycled.

Jill Alberts
111 Main Street
Dallas, TX 75219

OWNER STATEMENT

02/01/2009 - 02/28/2009

Portfolio Summary

Previous Balance		$	*740.00*
Income			
General		$	35.00
Grandview		$	3,298.77
	Total Income	$	3,333.77
Expenses			
General		$	100.00
Grandview		$	329.88
	Total Expenses	$	429.88
Owner Contributions		$	0.00
Owner Draws		$	3,461.39
Ending Balance		$	*182.50*
Portfolio Minimum		$	50.00
Due To Owner		$	0.00

> This section summarizes the income and expenses during the statement period detailed by each building. The **General** category reflects any transactions not associated with a particular property.

> **Portfolio Minimum** withheld for misc expenses

General Income And Expenses

Income

Type	Description	Comments	Date	Ref No			
Application Fee	Application Fees	Tenant Application: Sam Smith	02/03/2009	1411		$	35.00
					Total Income	$	35.00

Expenses

Type	Description	Comments	Date	Ref No			
Repairs	AAA Plumbing		02/24/2009			$	100.00
					Total Expense	$	100.00

Owner Contributions

Type	Description			Ref No			
No Items							
					Total Owner Contributions	$	0.00

> The **detail of the general income and expense** not associated with a property. This includes any owner draws or contributions.

Owner Draws

Type	Description	Comments	Date	Ref No			
Money Paid To Owner	Jill Alberts	Owner Draw 02/28/2009	02/28/2009	114		$	1,434.44
Money Paid To Owner	Jill Alberts	Owner Draw 02/28/2009	02/28/2009	115		$	270.00
Money Paid To Owner	Matthew Alberts	Owner Draw 02/28/2009	02/28/2009	118		$	1,434.45
Money Paid To Owner	Matthew Alberts	Owner Draw 02/28/2009	02/28/2009	119		$	270.00
					Total Owner Draws	$	3,408.89

Income And Expenses: Grandview

Income

Type	Description	Comments	Date	Ref No			
Rent	APT.B:Ellis, M.		02/03/2009	2525		$	1,098.77
Rent	APT.C:O'Brien, A.		02/10/2009	567		$	1,100.00
Rent	APT.B:Ellis, M.	SECDEP applied to charges	02/13/2009			$	1.23
Rent	APT.B:Ellis, M.	SECDEP applied to charges	02/13/2009			$	1,098.77
					Total Income	$	3,298.77

Expenses

Type	Description	Comments	Date	Ref No			
Management Fees	Lonestar Property Management		02/28/2009			$	329.88
					Total Expense	$	329.88
					Net Income	$	2,968.89

Unpaid Bills

Vendor	Location	Comments	Ref No	Amount	Paid Amount	Due
AAA Plumbing	ALBERTS:GRANDVIEW:APT.C		1701	$82.50	$0.00	$82.50
City Locksmith	ALBERTS:GRANDVIEW:APT.A			$50.00	$0.00	$50.00
				$132.50	$0.00	$132.50

Viewing Published Reports

Your property manager can give you real-time access to a variety of reports that can keep you in the loop regarding the management of your rental properties. All published reports will appear in the Reports tab of the owner portal where you can run them at your convenience.

Viewing Reports
To view a report that your management team has shared with you:

1. Click the Reports tab in the Owner Portal
2. Locate the appropriate report in the Reports table
3. Select the View option from the dropdown menu that appears in the Action column
4. This will open a new window where the shared report will appear

Example of a Shared Report

Accts. Receivable- Aged Receivable
A list of all tenants with past due charges with a summary of days past due.

Total 0-30 Days Past Due	Total 31-60 Days Past Due	Total 61-90 Days Past Due	Total 90 Days Past Due	Total Balance	Total Prepayments
$2,959.00	$1,233.00	$0.00	$0.00	$4,192.00	$0.00

Lease Name	Portfolio Abbr. Name	Building Abbr. Name	Unit Abbr. Name	Unit Type	Status	Total Area	Primary Contact First Name	Primary Contact Last Name	Last Payment Date	Balance	Prepayments	Rent Unpaid	0-30 Days Past Due	31-60 Days Past Due	61-90 Days Past Due	90 Days Past Due
Ellis, M.	ALBERTS	GRANDVIEW	APT.B	2 BR / 1 BA	Active	1200.0	Margaret	Ellis	04/29/2009	$2,463.00	$0.00	$2,153.00	$1,230.00	$1,233.00	$0.00	$0.00
O'Brien, A.	ALBERTS	GRANDVIEW	APT.C	2 BR / 1 BA	Active	1200.0	Ann	O'Brien	03/23/2009	$1,729.00	$0.00	$1,100.00	$1,729.00	$0.00	$0.00	$0.00

Viewing Your Bills

Your property manager can give you real-time access to all the bills and bill payments that have been recorded towards your rental properties. These bills include a breakdown of the expense line items, descriptions and possibly a scanned invoice from the vendor.

Viewing Bills

To view a list of all the bills applied towards your account:

1. Click the Bills tab in the Owner Portal
2. Search for your bills by using the date filter at the top of the My Bills table. By default, this filter is set to This Month and All Paid and Unpaid Bills
3. The filter at the bottom of this table allows you to increase/decrease the number of items shown and scroll between the various pages
4. The table below displays a list of your bills and a brief summary of each individual bill
5. To view the detail of any bill, select the View option from the dropdown menu that appears in the Action column
6. The resulting page will display t[...]cted bill

Bill De[tail]

Vendor	AAA Plumbing
Ref No.	422
Bill Date	09/09/2008
Due Date	09/15/2008
Terms	NET 30
Description	

Basic details of the bill including the name of the vendor and descriptions

Bill Splits reflect how the vendors invoices were itemized with comments

Bill Splits

Portfolio/Building	Unit	Account	Comments	Amount
ALBERTS / GRANDVIEW		CLEANM - Cleaning and Maint...	Plumbing issues with Grandview bldg	$1,200.00
				$1,200.00

Payment information for the bill

Payments

Date	Paid From	Payment Method	Amount
10/08/2008	1000 - Owners Trust Accou...	Check(113)	$1,700.00

Documents

	Filename	File Type	File Siz[e]		Action
	invoice.pdf	Acrobat			View

Documents attached to the bill that have been shared

Viewing Your Work Orders

Your property manager can give you instant access to all the service requests submitted by tenants occupying your rentals, as well as those work orders created by the management team. If your management company elects to do so, you might have the option to approve or reject work orders from the Maintenance section of the Owner Portal.

Viewing Work Orders
To view a list of all work orders:

1. Click the Maintenance tab in the Owner Portal
2. The ensuing page lists all work orders created for your rentals. Use the dropdown menus at the top of the My Work Orders table to filter the list by open/closed work orders and those items that require your approval.
3. The filter at the bottom of this table allows you to increase/decrease the number of items shown and scroll between the various pages
4. The table below displays a list of your work orders
5. To view the detail of any work order, select the View option from the dropdown menu that appears in the Action column
6. The resulting page will display the details of the selected work order

Approving/Rejecting Work Orders
Work orders can be approved/rejected from the My Work Orders list by selected the appropriate option from the Action column dropdown menu. Alternatively, you can approve or reject a work order by following these steps:

1. Click the Maintenance tab in the Owner Portal
2. The ensuing page lists all work orders created for your rentals. Use the dropdown menus at the top of the My Work Orders table to filter the list by open work orders and those items that require your approval.
3. The table below displays a list of your work orders that require approval
4. Locate the appropriate work order and select the View option from the dropdown menu that appears in the Action column

5. The resulting page will display the details of the selected work order
6. The top of the page will offer you the option to approve/reject the work order and enter a comment
7. Click the Save button when you have finished

Maintenance > WO# 5

Approve Yes

Comments

Work Orders requiring approval has this option at the top of the screen. Select the appropriate option and add a comment. This will be shared with the property manager and they will be notified via alert.

[Save]

Work Order Detail

Status	Open
Location	ALBERTS | GRANDVIEW
Description	Winterize the roof with another coat of all weather sealer.
Specific Location In Unit	Roof
Preferred Time to Enter	
Date Created	09/23/2008
Start Date	09/25/2008
Completed Date	
Estimated / Actual Cost	$4,200.00 / $0.00
Required Materials	
Managed By	Adam Silverthorne
Project Completion %	0.0 %

A description of the work order details including an estimated cost as outlined by the property manager vs. the actual cost which is the sum of all actual bills.

Work Order Documents

Filename	Fil
📄 Work Order- Classic Propertyware Style (w/ full address)	A
🖼 toilet.jpg	

All shared documents attached to the work order. Click to download and view online.

Building Detail

Building Name/Number	Grandview
Building Abbreviation	GRANDVIEW
Building Address	444 Jefferson St Dallas, TX 75219
County	
Building Type	Apartment
Building Category	Residential
Parcel Number	
Total Area	6,000.00 Sq Ft
Number of Floors	2
fireplace	
Lockbox Code	531365
Sprinkler Blowout	No

Details for the primary location for which the work order is attached.

Building Documents

Filename	File Type	File Size	Cre
📄 Statement.doc	Word Document	38k	

Shared documents attached to the building

Comments

Mrs. Margaret Ellis
9/10/08 9:26:19 AM

Might be a good idea to come sooner than later. I think the water might be damaging the baseboard.

Sina Shekou
9/10/08 4:3:19 PM

Okay, we will head over today

Mrs. Margaret Ellis
4/20/09 4:21:34 PM

Thank you for taking care of this!

READD-ONLY *view of the conversation between property manager and the tenant as it relates to the work order*

Viewing Shared Documents

Your management company can give you real-time access to important documents regarding your rental properties, tenants and much more.

Viewing Shared Documents
To view the documents that your property manager has shared with you:

1. Click the Documents tab in the Owner Portal
2. Locate the appropriate document in the Documents table
3. Click the name of the document to view
4. This will open a new window where the shared document will appear