Propertyware New View Tenant Portal User Guide

October 2020

Contents

CHAPTER 1

Getting Started with the Tenant Portal

The Tenant Portal provides you real-time access to information about your lease via the internet.

From the Tenant Portal, you can:

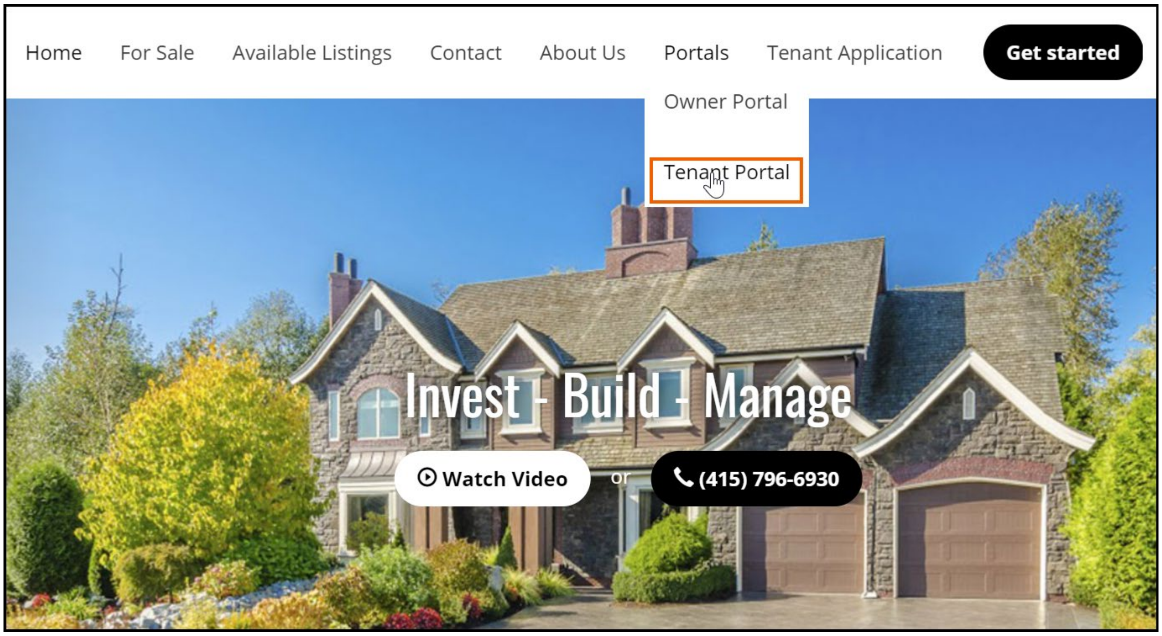
- Review and edit contact information.
- Create and manage services requests.
- View your rental details.
- Give notice.
- Communicate with the property management team.
- Review documents shared by the owner or property management company.

In This Chapter

Accessing the Tenant Portal

Access the Tenant Portal from your property manager's website.

Every web site will be unique, but you should see an obvious link that takes you to the **Tenant Portal Sign-On** page.



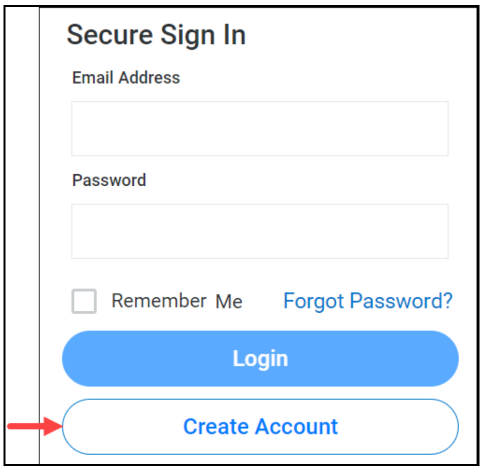
Signing Up for a Portal Account

You can sign up for your Tenant Portal account at the property management company website.

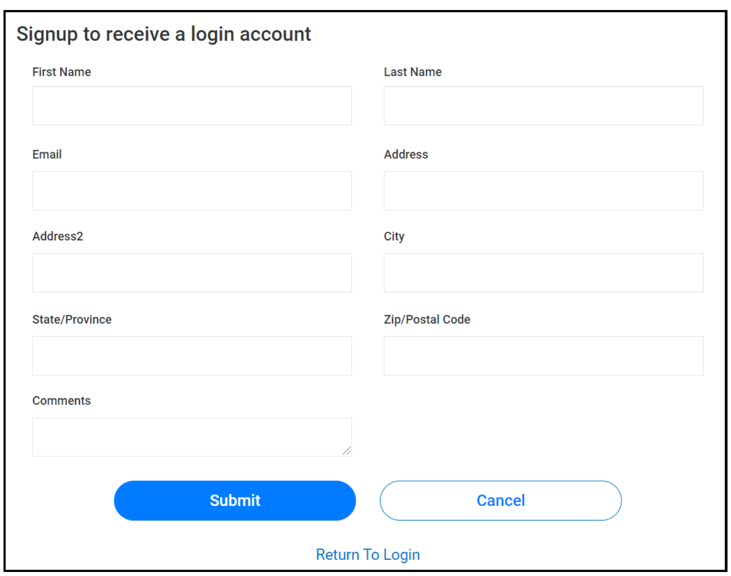
You must have an email address to have a log in account for the Tenant Portal. Your property manager uses this address to set up your account and sends you an email message with sign-on instructions to your portal. In most cases, your email address is the username.

To sign up for a portal account:

1. From the Tenant Portal link, click the **Create Account** button.



The **Sign Up** page opens.



2. Fill out all the required fields and click the **Submit** button.

The information you submit must match the information on your lease file.

3. After you submit your request, your property manager will activate your account and send you an email message that includes a password and sign-on instructions.
4. Use the instructions in the email message to sign on to your Tenant Portal account.

Signing In To the Tenant Portal

To access the Tenant Portal, you must provide an email address to associate with your account. Your property manager uses this email address to set up your account and sends an email with sign-in instructions for the Tenant Portal.

To sign in to the Tenant Portal:

1. After you request access to the tenant Portal, you receive an email message that includes:
   - Web address of the Tenant Portal **Login** page.
   - Your login information, including a temporary password.
   - Instructions for signing in to the Tenant Portal.
2. Open the Tenant Portal **Login** page.
3. In the **Email Address** field, type your email address.
4. In the **Password** field, type the password provided in the email you received from your property manager.
5. Click **Login**.

   The Tenant Portal opens.

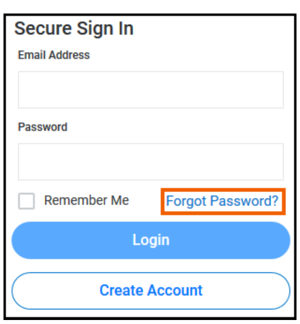
Resetting Your Tenant Portal Password

If you lose or forget your Tenant Portal password, you can reset it from the **Login** page.

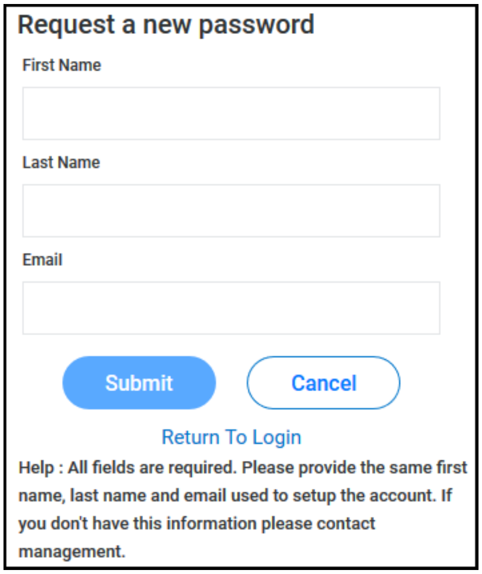
If you need to change your password for security purposes, use the **Change Password** *option in the* **User Menu**.

To reset your password:

1. On the **Login** page, click **Forgot Password?** (or a similarly named button or link).



The **Request a New Password** page (or a similarly named page) opens.



2. Provide your **First Name**, **Last Name**, and **Email**.
3. Click **Submit**.

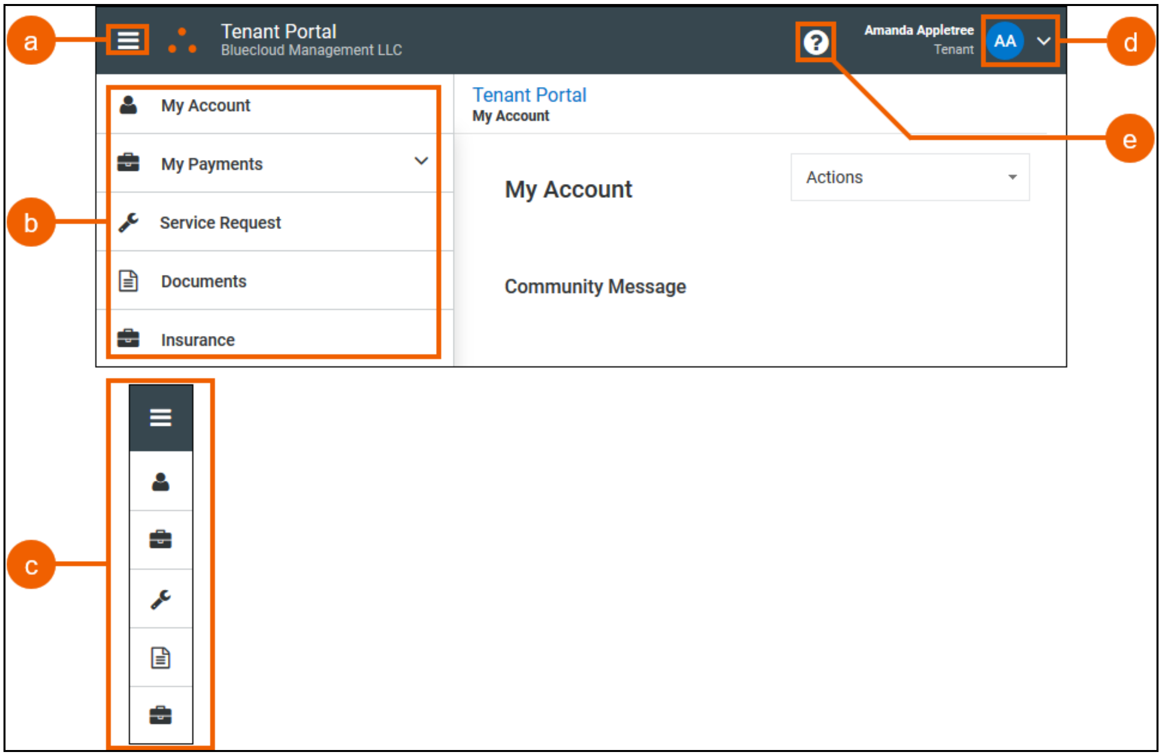
   You will receive an email with a temporary password.
4. Use the temporary password to sign in to the Tenant Portal.

   After you sign in to the Tenant Portal, you will be prompted to choose a new password.

Navigating the Tenant Portal in the New View

To navigate in the New View Tenant Portal you can use the **Navigation Menu**, the **Help** button, and the **User Menu**.

Because your property management company can customize the names of the Navigation Menu items, your New View Tenant Portal may have different titles in the Navigation Menu. The individual pages in the New View Tenant Portal may include different titles as well.



a) **Navigation Menu** button: Click to expand or collapse the **Navigation Panel**.

b) **Navigation Panel**: Expanded. Provides access to Tenant Portal menu items.

c) **Navigation Panel**: Collapsed. Provides access to Tenant Portal menu items.

d) **User Menu** (on page 84): Click to view or change your contact information, change your password, return to the **My Account** page, log out of the Tenant Portal, switch to or from Dark Navigation.

e) **Help** button: Click to view help for the current page.

Your Tenant Portal may have some or all of these menu items and the items may have different names; however, regardless of the name, the function of the menu items remains the same.

- **My Account** (on page 11): Provides an overview of your profile, your lease, and your contact information and lets you communicate with your management team.
- **My Payments** (on page 37): Provides payment details about your lease.
- **Service Request** (on page 63): If your management company uses online service requests on the Tenant Portal, this menu item lists all your maintenance requests in chronological order, regardless of status.
- **Documents** (on page 81): Provides links to shared building, lease, or other documents posted by the property manager.
- **Insurance** (on page 83): Contains information about your renter's insurance policy.

CHAPTER 2

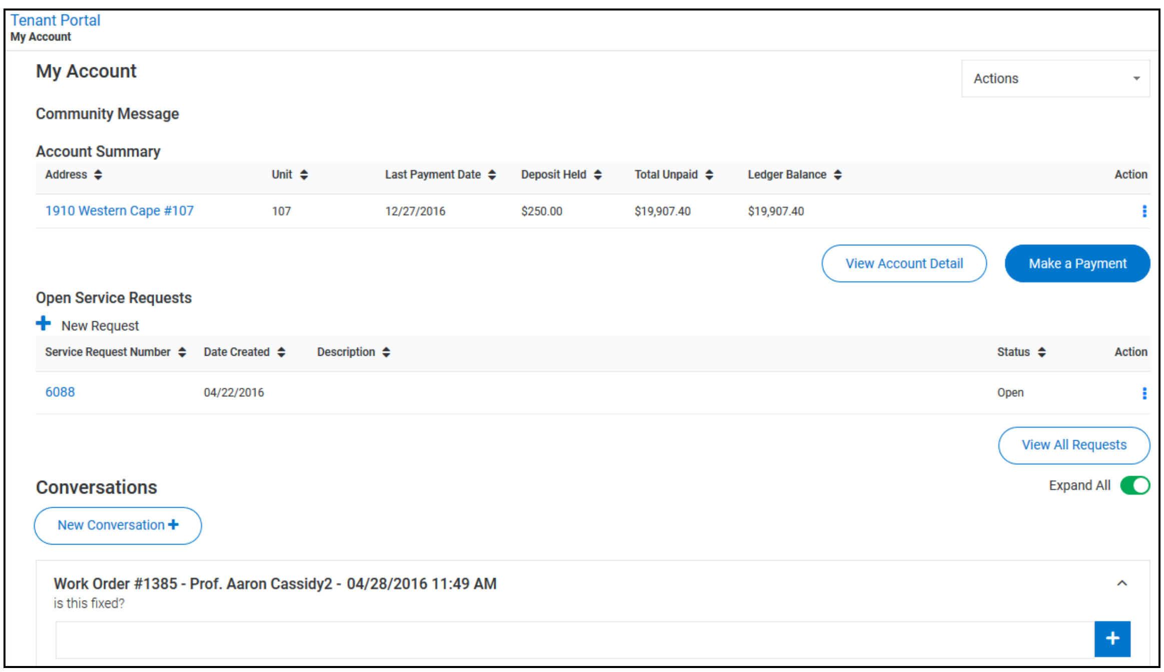
My Account

The **My Account** page provides an overview of your account information and a series of options that allow you to manage your account.

The available options depend on which online features your management team uses.

The **My Account** page provides these sections:

- *Community Message* section (on page 12): Used by your management company to post messages to you and other tenants.
- *Account Summary* section (on page 13): Shows your account balance and allows you to review your account activity. If your management company uses online payments on the tenant portal, you can also make payments here.
- *Open Service Requests* section (on page 15): If your management company uses online service requests on the Tenant Portal, this section allows you to review, cancel, and edit your open service requests.
- *Conversations* section (on page 33): Allows you to have conversations with your management team.



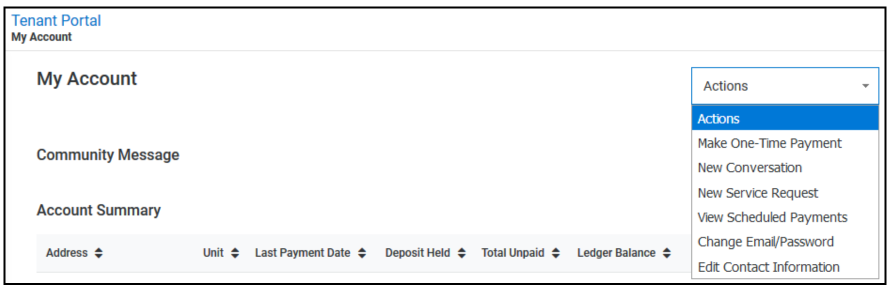
In This Chapter

Actions Drop-Down List

The **Actions** drop-down menu on the **My Account** page provides short cuts to common actions.

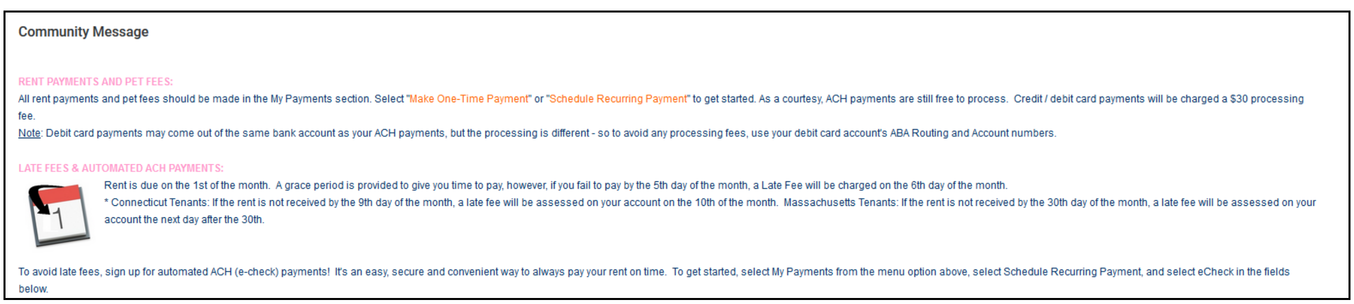
From the **Actions** drop-down menu, you can:

- **Make One-Time Payment** (on page 51): Opens the **Make a One-Time Payment** page.
- **New Conversation**: Opens the **New Conversation** pane and start a conversation.
- **New Service Request** (on page 16): Opens the **New Service Request** pane and create a service request.
- **View Scheduled Payments** (on page 59): Opens the **Scheduled Payments** page.
- **Change Email/Password (on page 85):** Opens the **Change Password** pane.
- **Edit Contact Information** (on page 84): Opens the **Contact Info** page.



Community Messages Section

In the *Community Message* section of the **My Account** page, you can view messages posted to you and other tenants in your community.

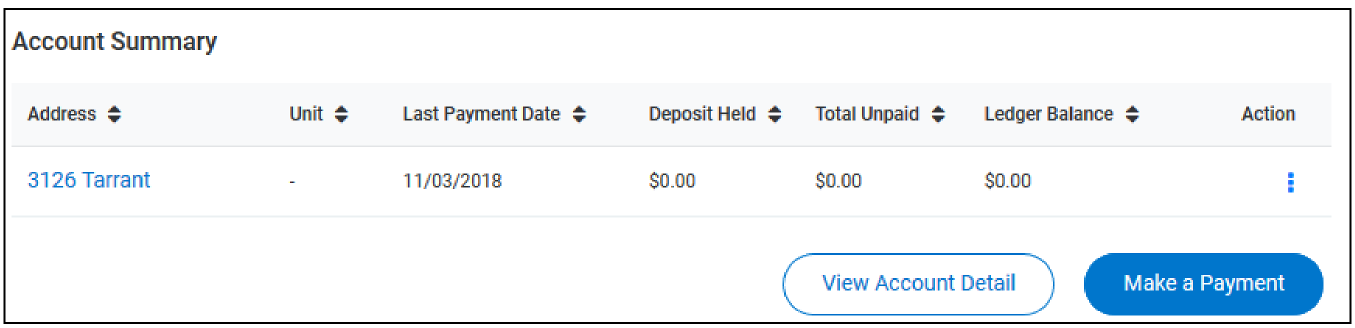


Account Summary Section

The *Account Summary* section of the **My Account** page presents a list of your payments and transactions.

For each transaction, the list includes:

- **Address**: Property address associated with the transaction. Click an address to open the **My Rentals** page for that property.
- **Unit**: Unit number associated with the property.
- **Last Payment Date**: For payments, date the payment was made.
- **Deposit Held**: Amount held for deposit, if any.
- **Total Unpaid**: Remaining unpaid amount.
- **Ledger Balance**: Balance of the Resident Ledger.
- **Action**: Click the **Action** icon to:
  - **View Detail**: Select to open the **My Rentals** (on page 14) page for that property.
  - **Make One-Time Payment**: Select to open the **Make a One-Time Payment (on page 51)** page and make a payment for that property. This action is only available if your property management company allows payments from the Tenant Portal.



Click any column header (except **Actions**) to sort the list of transactions.

If you lease one property, the **View Account Detail** and **Make a Payment** buttons appear after the list. If you lease more than one property, the buttons do not appear.

Click **View Account Detail** to open the **My Rentals** page for your lease.

Click **Make a Payment** to open the **Make a One-Time Payment** (on page 51) page.

My Rentals/Account Details

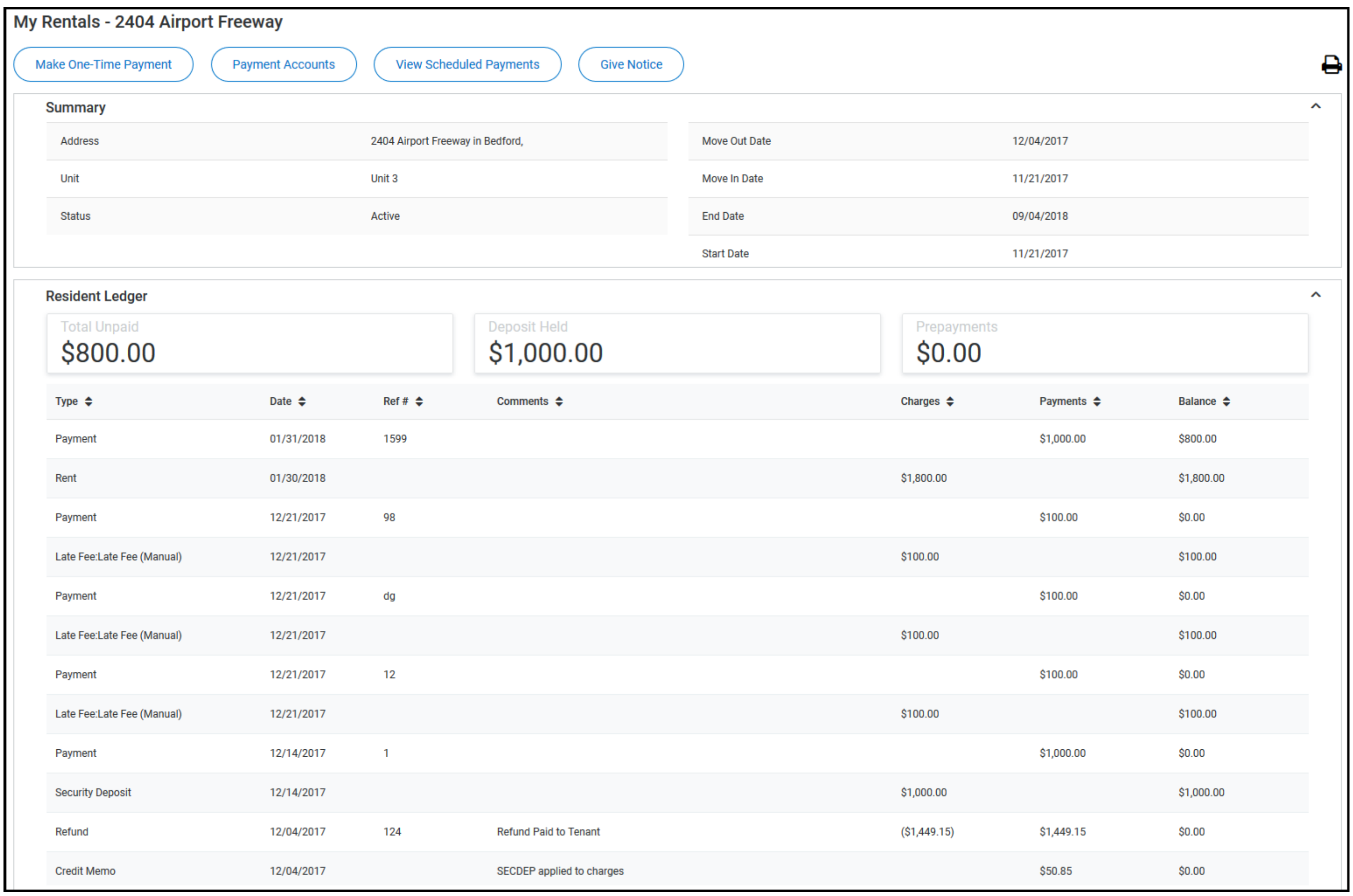
The **My Rentals** page allows you to review the details of your leases.

The page is divided into two sections:

- The *Summary* section displays information about your lease.
- The *Resident Ledger* section shows charge and payment details for your account.

From the **My Rentals** page, you can:

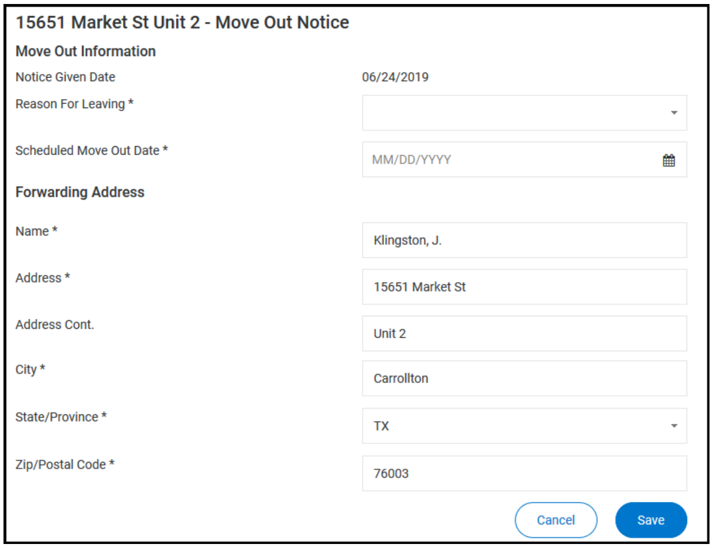
- **Make a One-Time Payment** (on page 51): Click to make an online payment for your account or to set up a payment account.
- **Payment Accounts** (on page 46): Click to open the **Payment Accounts** page
- **View Scheduled Payments** (on page 59):
- **Give Notice** (on page 15): Click to notify your management team that you are ending a lease.



Giving Notice

When you click **Give Notice** on the **My Rentals** page, the **Move Out Notice** page opens.

To notify your management team that you are ending a lease, complete the required fields, then click **Save**.

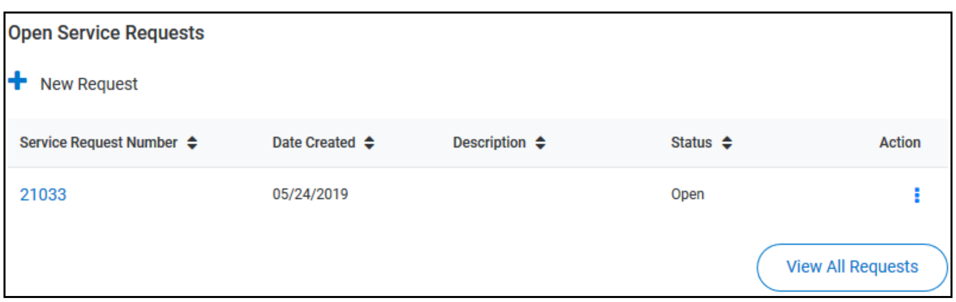


Open Service Requests Section

The *Open Service Requests* section of the **My Accounts** page contains a list of your open service requests.

If your management company allows you to create service requests from the Tenant Portal, you can click **New Request** to create a new service request.

Click **View All Requests** to open the **Service Requests** (on page 63) page where you can view all service requests, both open and closed.

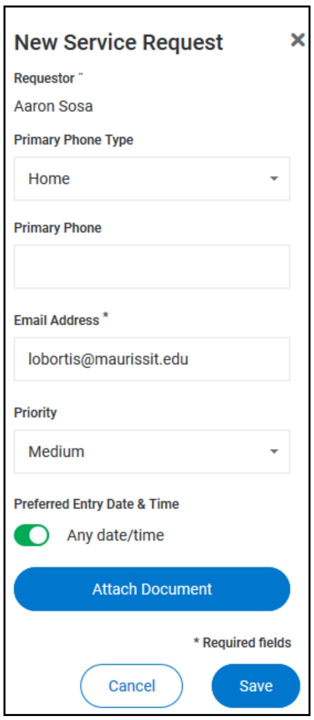


Creating a New Service Request

To create a new service request in the New View Tenant Portal:

1. You can open the **New Service Request** pane from different locations:
   - From the **My Service Requests** page, click **New Service Request**.
   - From the **My Account** page, click **New Request** in the *Open Service Requests* section.
   - From the **Actions** drop-down menu on the **My Account** page, select **New Service Request**.
   - From the **Service Request Details** page, click **New Service Request**.

   The **New Service Request** pane opens.

2. From the **Building/Unit** drop-down list, select the location for the service request.
3. In the **Specific Location** text box, provide additional details regarding the location of the maintenance problem.
4. In the **Description** text box, type a detailed description of the problem.
5. From the **Primary Phone Type** drop-down list, select the type of phone number you are providing for the request: **Mobile**, **Work**, or **Home**.
6. In the **Primary Phone** text box, type the phone number to use for this request.
7. The **Email Address** text box is automatically populated with the email address associated with your account. To change the email, type your changes in the text box.

8. From the **Priority** drop-down list, select the urgency of the service request.
9. In the *Preferred Entry Date & Time* section, configure the entry date and time:
    a) To indicate that any time and date are acceptable, move the **Any Date/Time** toggle switch to the right.
    b) To specify a preferred entry time, move the **Any Date/Time** toggle switch to the left. In the date and time fields that appear:
        - In the **Preferred Entry Date** calendar box, type or select the date on which you would like the service to be performed.
        - In the **Preferred Time to Enter** date box, type or select the time at which you would like the service to be performed.
10. To attach a document (including image files), click Attach Document, then use the browser's file upload dialog box to navigate to the file to attach.
11. When all the fields are complete, click **Save**.
12. If you added a new phone number or email address, a dialog box appears and you must indicate whether or not your profile should be updated to include your changes.

    The new service request is created and appears in the list of open service requests.

Request Details

The **Service Request Details** page is made up of three sections:

- *Request Details* section - In this section, you can:
  - View the details of a service request (on page 19).
  - Create a new service request (on page 16).
  - Edit a service request (on page 22).
  - Cancel a service request (on page 24).
- *Maintenance Documents* section - In this section, you can:
  - View documents attached to the service request (on page 26).
  - Attach a document to the service request (on page 27).
- *Conversations* section - In this section, you can:
  - View a list of conversations concerning the service request (on page 29).
  - Add a new message to an existing conversation (on page 30).
  - Create a new conversation for the service request (on page 31).

To open the **Service Request Details** page, from the **Service Requests** page or the *Open Service Requests* section of the **My Account** page, click the **Service Request Number** link for a service request.

Request Details Section

In the *Request Details* section of the **Service Request Details** page, you can:

- View the details of a service request (on page 19).
- Create a new service request (on page 16).
- Edit a service request (on page 22).
- Cancel a service request (on page 24).

Viewing Service Request Details

In the *Request Details* section of the **Service Request Details** page, you can view the details of a specific service request.

The request details include:

- **Status**: Indicates whether or not the service request is in progress (**Open**) or has been completed (**Closed**).
- **Specific Location in Unit**: Location details provided when the service request was created or edited.
- **Description**: Detailed explanation of the issue that prompted the service request.
- **Requestor**: Person who submitted the service request.
- **Priority**: Urgency assigned to the service request.
- **Preferred Time to Enter**: Date and time the tenant would like the service to occur.
- **Date Created**: Date the service request was submitted.
- **Start Date**: Date work started on the service request.
- **Completed Date**: Date work was on the service request was completed.
- **Closing Comments**: Comments provided by the person who completed the request.

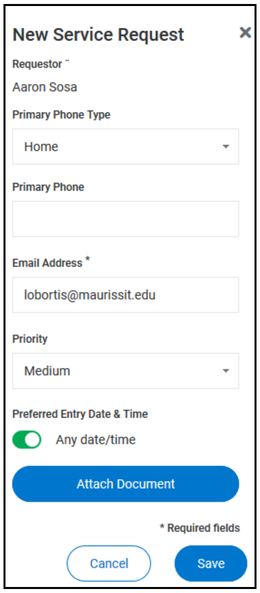
If a field in the *Request Details* section is blank, no data has been entered for that field.

Creating a New Service Request

To create a new service request in the New View Tenant Portal:

1. You can open the **New Service Request** pane from different locations:
    - From the **My Service Requests** page, click **New Service Request**.
    - From the **My Account** page, click **New Request** in the *Open Service Requests* section.
    - From the **Actions** drop-down menu on the **My Account** page, select **New Service Request**.
    - From the **Service Request Details** page, click **New Service Request**.

The **New Service Request** pane opens.



2. From the **Building/Unit** drop-down list, select the location for the service request.
3. In the **Specific Location** text box, provide additional details regarding the location of the maintenance problem.
4. In the **Description** text box, type a detailed description of the problem.
5. From the **Primary Phone Type** drop-down list, select the type of phone number you are providing for the request: **Mobile**, **Work**, or **Home**.
6. In the **Primary Phone** text box, type the phone number to use for this request.
7. The **Email Address** text box is automatically populated with the email address associated with your account. To change the email, type your changes in the text box.
8. From the **Priority** drop-down list, select the urgency of the service request.
9. In the *Preferred Entry Date & Time* section, configure the entry date and time:
   a) To indicate that any time and date are acceptable, move the **Any Date/Time** toggle switch to the right.
   b) To specify a preferred entry time, move the **Any Date/Time** toggle switch to the left. In the date and time fields that appear:
      - In the **Preferred Entry Date** calendar box, type or select the date on which you would like the service to be performed.
      - In the **Preferred Time to Enter** date box, type or select the time at which you would like the service to be performed.
10. To attach a document (including image files), click Attach Document, then use the browser's file upload dialog box to navigate to the file to attach.

11. When all the fields are complete, click **Save**.
12. If you added a new phone number or email address, a dialog box appears and you must indicate whether or not your profile should be updated to include your changes.

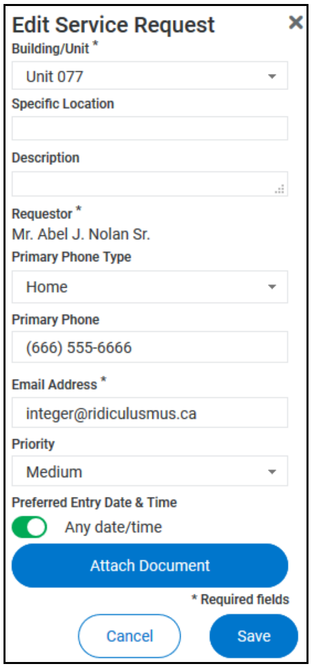
    The new service request is created and appears in the list of open service requests.

Editing a Service Request

To edit a service request:

1. From the **Service Request Details** page, click **Edit**.

   The **Edit Service Request** pane opens.



2. From the **Building/Unit** drop-down list, select the location for the service request.
3. In the **Specific Location** text box, provide additional details regarding the location of the maintenance problem.
4. In the **Description** text box, type a detailed description of the problem.
5. From the **Primary Phone Type** drop-down list, select the type of phone number you are providing for the request: **Mobile**, **Work**, or **Home**.
6. In the **Primary Phone** text box, type the phone number to use for this request.
7. The **Email Address** text box is automatically populated with the email address associated with your account. To change the email, type your changes in the text box.
8. From the **Priority** drop-down list, select the urgency of the service request.

9. In the *Preferred Entry Date & Time* section, configure the entry date and time:
    a) To indicate that any time and date are acceptable, move the **Any Date/Time** toggle switch to the right.
    b) To specify a preferred entry time, move the **Any Date/Time** toggle switch to the left. In the date and time fields that appear:
        - In the **Preferred Entry Date** calendar box, type or select the date on which you would like the service to be performed.
        - In the **Preferred Time to Enter** date box, type or select the time at which you would like the service to be performed.
10. To attach a document (including image files), click Attach Document, then use the browser's file upload dialog box to navigate to the file to attach.
11. When all the fields are complete, click **Save**.
12. If you added a new phone number or email address, a dialog box appears and you must indicate whether or not your profile should be updated to include your changes.

    The new service request is created and appears in the list of open service requests.

Cancelling a Service Request

You can cancel a service request from different locations:

- From the **Service Request Details** page, click **Cancel Service Request**.
- In the *Open Service Requests* section on the **My Account** page, select **Cancel** from the **Action** drop-down menu.
- From the **Action** drop-down menu on the **Service Requests** page, select **Cancel**.

Only open service requests can be canceled.

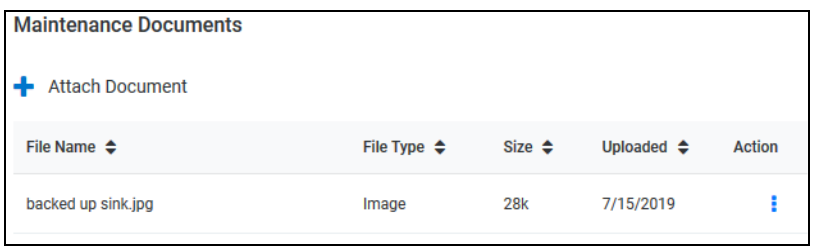
When you cancel a service request, the request's status changes to "Canceled by Tenant".

Canceling a service request is permanent.

Maintenance Documents Section

In the *Maintenance Documents* section of the **Service Request Details** page you can:

- View a list of documents attached to the service request (on page 25).
- Open and manage documents attached to the service request (on page 26).
- Attach a document to the service request (on page 27).

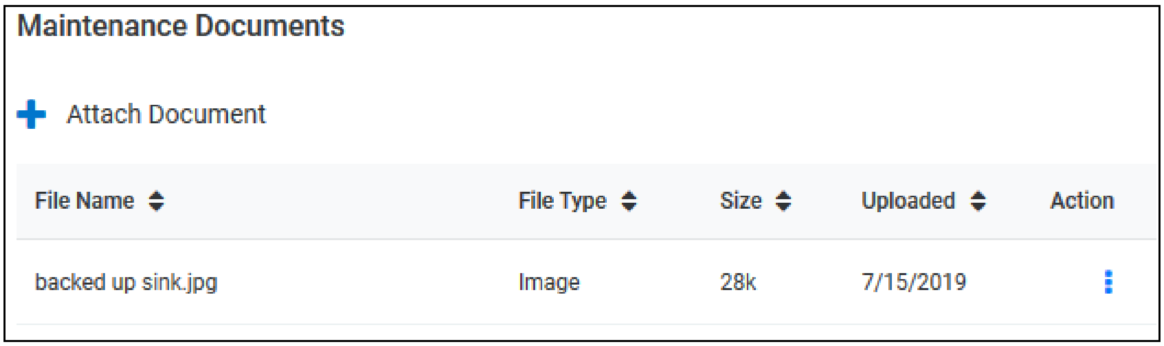


Viewing the List of Attached Maintenance Documents

In the *Maintenance Documents* section of the **Service Request Details** page, you can view the details of a specific document attached to the service request.

The document details include:

- **File Name**: Name of the attached document.
- **File Type**: Type of file, as determined by the file extension of the attached document (.jpg, .txt, .pdf, etc.).
- **Size**: File size of the attached document.
- **Action** : Actions available for opening and managing attached documents (on page 26).



Opening and Managing Documents Attached to the Service Request

For each attached document in the *Maintenance Documents* section list on the **Service Request Details** page, you can click the **Action** icon to open the document or delete it.

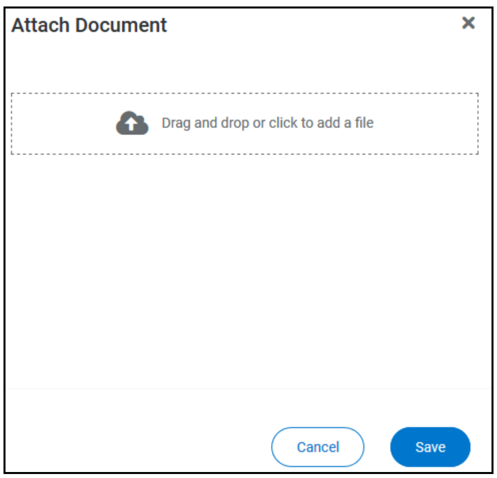
To open an attached document, click the **Action** icon associated with the document, then select **View** from the list that opens. The document opens.

To delete an attached document, click the **Action** icon associated with the document, then select **Del** from the list that opens. The document is removed from the list of attached documents and is no longer attached to the service request.

Attaching a Document to the Service Request

To attach a document to the service request:

1. You can attach a document to a service request from different locations:
    - From the *Maintenance Documents* section of the **Service Request Details** page, click **Attach Document**.
    - From the **Edit Service Request** pane, click **Attach Document**.
2. If you click **Attach Document** in the **Edit Service Request** pane, follow the instructions for attaching a file via your browser's file upload navigator. Skip to Step 5 of this procedure.
3. If you click **Attach Document** in the *Maintenance Documents* section of the **Service Requests Details** page, the **Attach Document** pane opens.



4. Either drag a file into the target area or click the target area to open your browser's file upload navigator.
5. If you drag a file into the target area, the file's name appears in the **Attach Document** pane.
6. If you open the file upload navigator, follow the browser's instructions to locate the file and upload it.
    - In the **Attach Document** pane, the file name appears under the target area.
    - In the **Edit Service Request** pane, the file name appears below the **Attach Document** button.

You can attach only one file at a time.

7. Click **Save**.

    The document appears in the *Maintenance Documents* list.

Conversations Section of Service Request Details

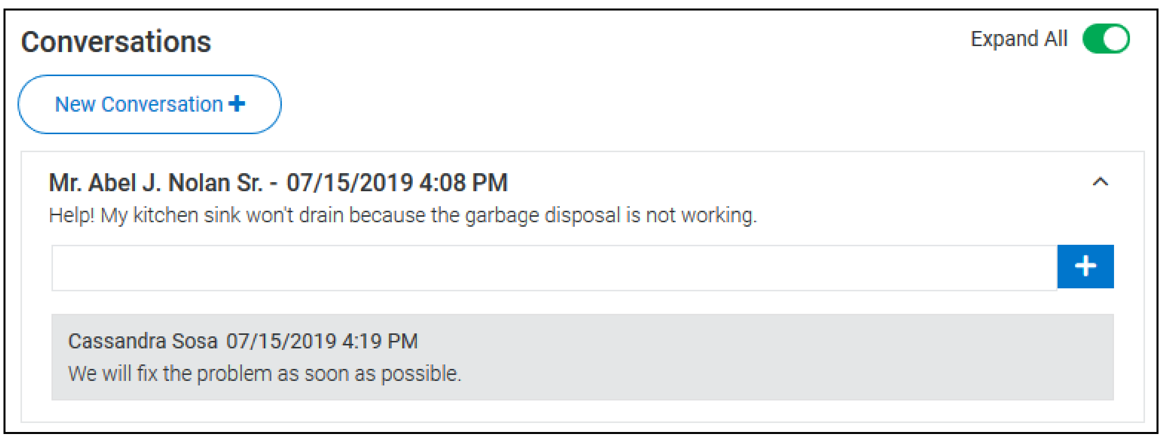
The *Conversations* section of the **Service Request Details** page lists conversations regarding the service request.

Conversations include your comments and responses, and the property managers' comments and responses.

Only conversations related to the service request details you are viewing appear in the *Conversations* section.

In the *Conversations* section, you can:

- View a list of existing conversations related to the service request (on page 29).
- Add a comment to an existing conversation (on page 30).
- Start a new conversation (on page 31).



Viewing the List of Conversations

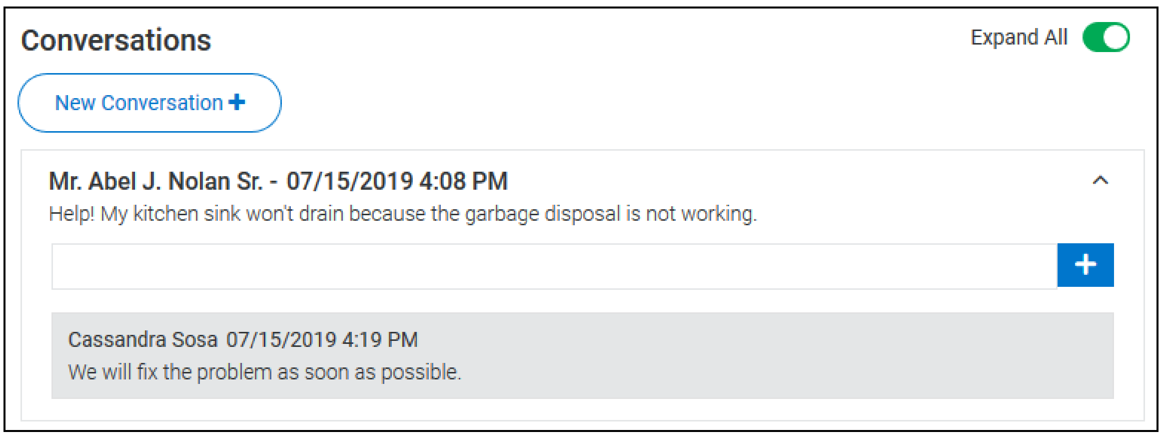
In the *Conversations* sections of the **My Account** page and the **Service Request Details** page, you can view a list of conversations.

On the **My Account page**, all open conversations appear in the list of conversations.

On the **Service Request Details** page, only conversations related to the service request appear in the list of conversations.

Each conversation includes:

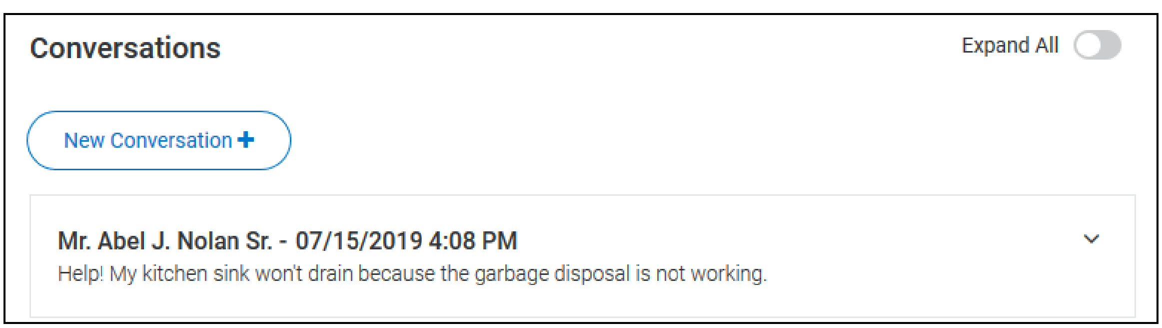
- The name of the person who started the conversation.
- The name of the person who made each comment.
- The date and time the conversation or comment was created.
- A **Comment** text box that allows you to add a comment to the conversation (on page 30).



Expanding and Collapsing Conversations

To expand or collapse a single conversation click the **Expand/Collapse** icon /.

To expand or collapse all conversations, click the **Expand All** toggle switch. The switch turns green when all conversations are expanded.

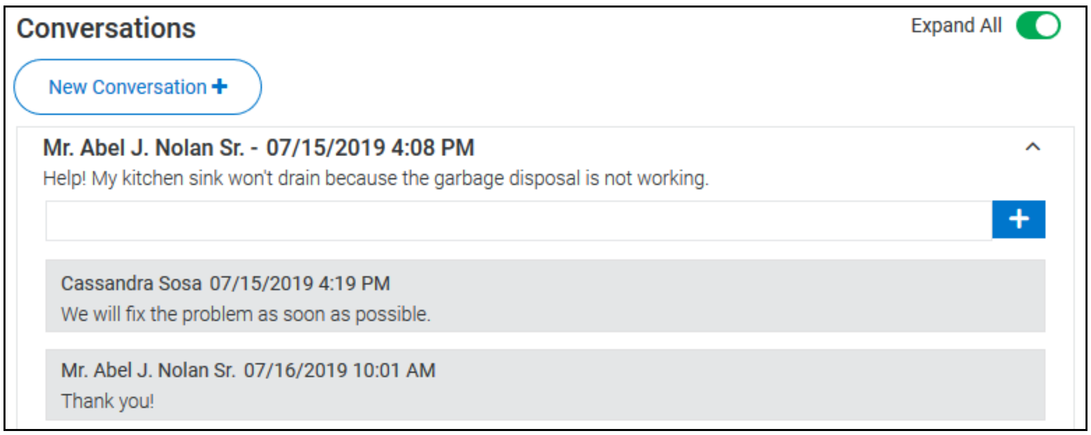


Adding a New Comment to an Existing Conversation

To add a comment to a conversation:

1. In the **Comment** text box, type your message.
2. To post your comment, click the **Add Comment** icon .

   Your comment appears under the next most recent comment and is also sent to the property managers.

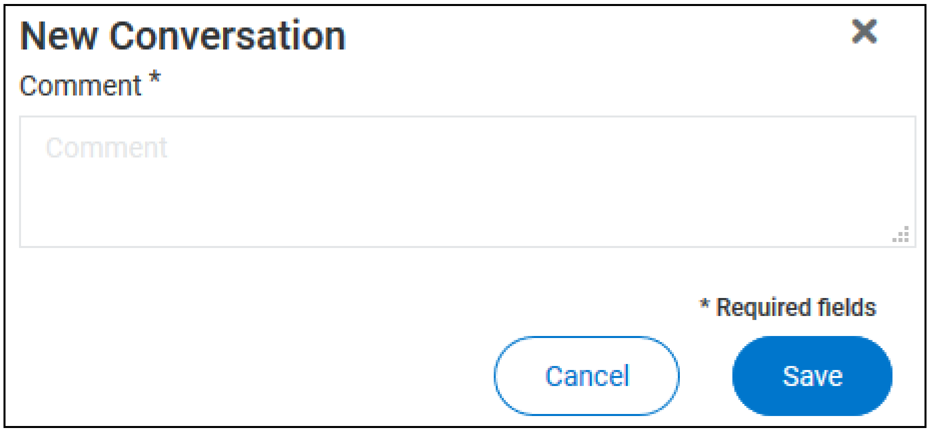


Starting a New Conversation

To start a new conversation:

1. Click **New Conversation**.

   The **New Conversation** pane opens.

2. Type your message in the **Comment** text box.

3. When your message is complete, click **Save** to send the message.

   The conversation is delivered to the property management company and appears in your list of conversations.

   Your name and lease information are included with the message, and, if you started the new conversation from the **Service Request Details** page, the conversation is associated with the service request and the service request number is included in the message that the property management company receives.

View All Requests

In the *Open Service Requests* section of the **My Account** page, you can view all service requests, including closed or canceled requests.


Open Service Requests

New Request

Service Request Number	Date Created	Description	Status	Action
157	07/15/2019	Disposal not working.	Open	

View All Requests

To view all service requests, click **View All Requests**.

The **Service Requests** page opens with all service requests listed.


My Service Requests

New Service Request

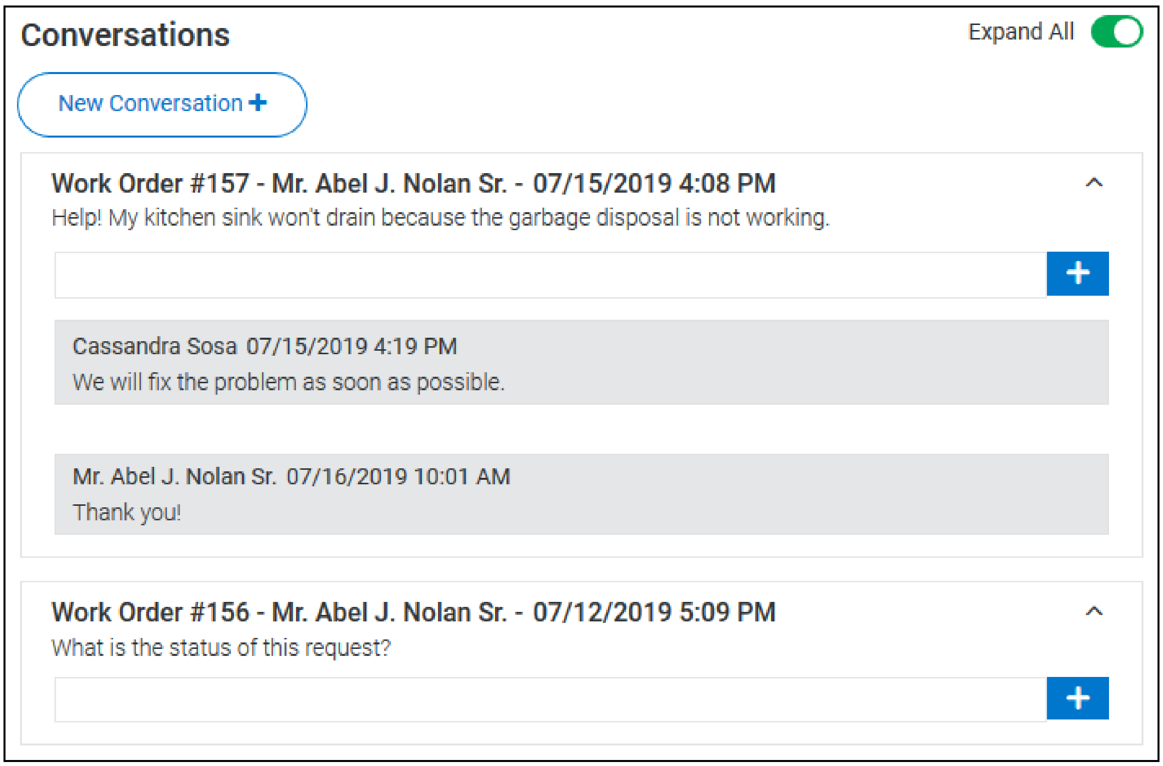
Service Request Number	Date Created	Description	Status	Action
156	07/12/2019		Canceled By Tenant	
157	07/15/2019	Disposal not working.	Open	

Conversations Section

The *Conversations* section of the **My Account** page is a list of all your conversations with the property management company.

From the *Conversations* section, you can:

- View existing conversations (on page 29).
- Add a new comment to an existing conversation (on page 30).
- Start a new conversation (on page 31).



Viewing the List of Conversations

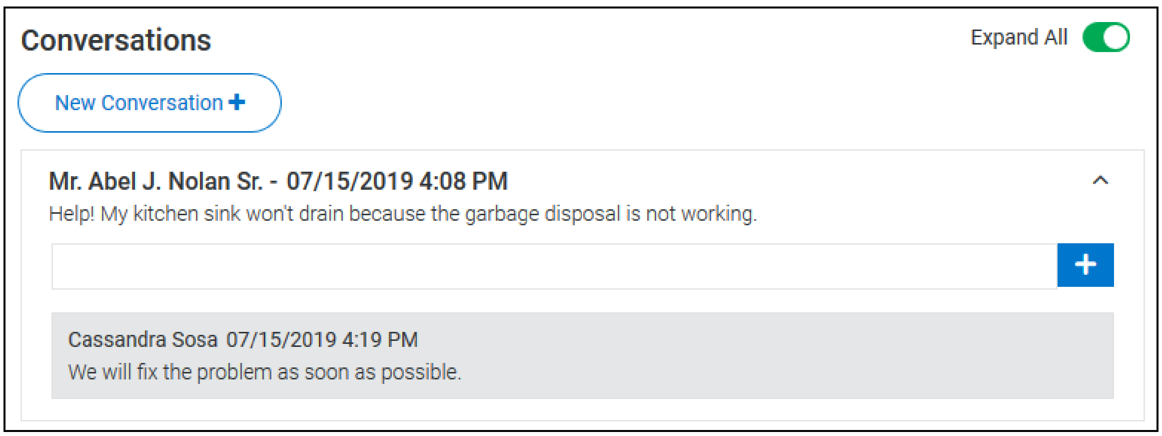
In the *Conversations* sections of the **My Account** page and the **Service Request Details** page, you can view a list of conversations.

On the **My Account page**, all open conversations appear in the list of conversations.

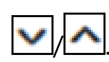
On the **Service Request Details** page, only conversations related to the service request appear in the list of conversations.

Each conversation includes:

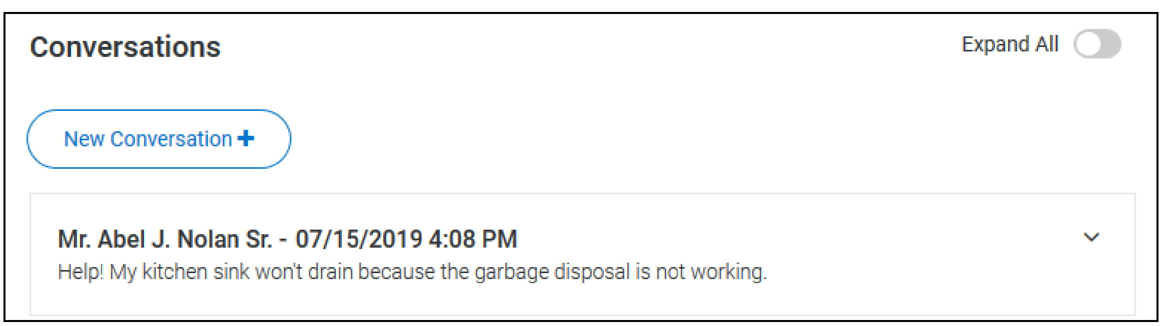
- The name of the person who started the conversation.
- The name of the person who made each comment.
- The date and time the conversation or comment was created.
- A **Comment** text box that allows you to add a comment to the conversation (on page 30).



Expanding and Collapsing Conversations

To expand or collapse a single conversation click the **Expand/Collapse** icon .

To expand or collapse all conversations, click the **Expand All** toggle switch. The switch turns green when all conversations are expanded.

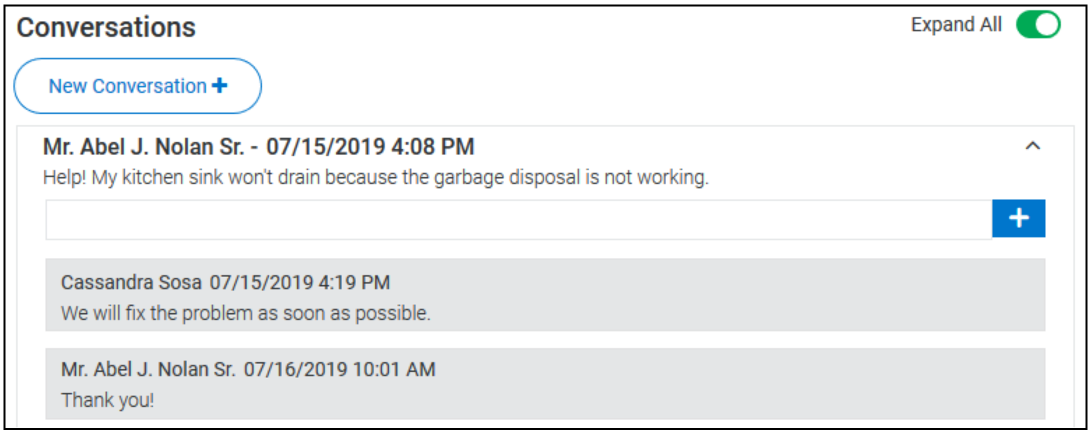


Adding a New Comment to an Existing Conversation

To add a comment to a conversation:

1. In the **Comment** text box, type your message.
2. To post your comment, click the **Add Comment** icon .

   Your comment appears under the next most recent comment and is also sent to the property managers.

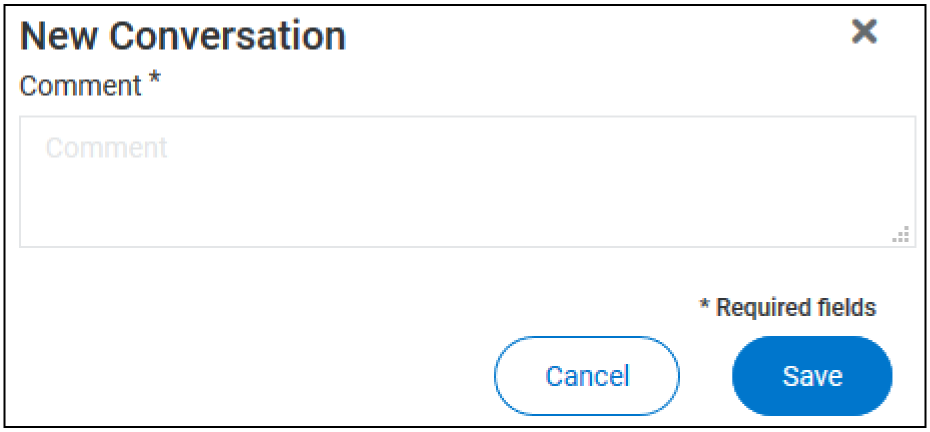


Starting a New Conversation

To start a new conversation:

1. Click **New Conversation**.

   The **New Conversation** pane opens.

2. Type your message in the **Comment** text box.
3. When your message is complete, click **Save** to send the message.

   The conversation is delivered to the property management company and appears in your list of conversations.

   Your name and lease information are included with the message, and, if you started the new conversation from the **Service Request Details** page, the conversation is associated with the service request and the service request number is included in the message that the property management company receives.

CHAPTER 3

My Payments

If your management company allows online payments from the Tenant Portal, you can select one of these actions from the **My Payments** navigation menu item:

- **Make a One-Time Payment** (on page 51): Click to open the **Make a One-Time Payment** page and make a single online payment.
- **Schedule Recurring Payment** (on page 41): Click to open the **Schedule Recurring Payment** page and set up recurring automatic payments. If you have not set up a payment account, the **New Payment Account** page opens.
- **Payment Accounts** (on page 46): Click to open the **Payment Accounts** page or, if you have not set up any payment accounts, the **New Payment Account** page.
- **View Scheduled Payments** (on page 59): Click to open the **Scheduled Payments** page. If you have not set up a payment account, the **New Payment Account** page opens.

In This Chapter

Adding a Payment Account

You can open the **New Payment Account** page from several locations:

- From the **Payment Accounts** page:
  - If you do not have a payment account set up, the **New Payment Account** page opens automatically when you select **Payment Accounts** from the **My Payments** navigation menu item.
  - If you do have a payment account set up, you can click **Add Payment Account** to open the **New Payment Account** page and set up another account.
- From the **Make a One-Time Payment** page, by clicking **Add Payment Account**.
- From the **Schedule Recurring Payment** page:
  - If you do not have a payment account set up, the **New Payment Account** page opens automatically when you select **Schedule Recurring Payment** from the **My Payments** navigation menu item.
  - If you do have a payment account set up, you can click **Add Payment Account** to open the **New Payment Account** page and set up another account.
- From the **Scheduled Payments** page:
  - If you do not have a payment account set up, the **New Payment Account** page opens automatically when you select **View Scheduled Payments** from the **My Payments** navigation menu item.
  - If you do have a payment account set up, you can click **Add Payment Account** to open the **New Payment Account** page and set up another account.

Depending on how the property management team has set up the Tenant Portal, you can set up an E-Check account, a credit card account, or both:

- To set up an E-Check payment account, select **E-Check**, then follow the instructions in **Adding an E-Check Payment Account** (on page 39).
- To set up a credit card payment account, select **Credit Card**, then follow the instructions in **Adding a Credit Card Payment Account** (on page 40).

Adding an E-Check Payment Account

To add an E-Check payment account:

1. Select **E-Check**.
2. Provide the **Account Information**:
   - **Bank Name**
   - **Account Number**
   - **Re-Enter Account Number**
   - **Routing Number**

     The system verifies that the routing number is an active routing number. Incorrect account information can result in a returned check.
   - **Account Nickname**
3. From the **Account Type** drop-down list, select the type of account to use, **Checking** or **Savings**.
4. Provide the **Billing Information**:
   - **First Name**
   - **Last Name**
   - **Billing Address**
   - **Address 2** (optional)
   - **City**
   - **State** (select from the drop-down list)
   - **ZIP/Postal Code**
   - **Birth Date** (optional)
   - **Billing Email** (optional)
5. Click **Save**.

Adding a Credit Card Payment Account

To add a credit card payment account:

1. Select **Credit Card**.

   The fields on the **New Payment Account** page change to match the credit card fields.

2. Provide the **Account Information**:

   - **Card Number**
   - **Card Expiration**
   - **Account Nickname**

3. Provide the **Billing Information**:

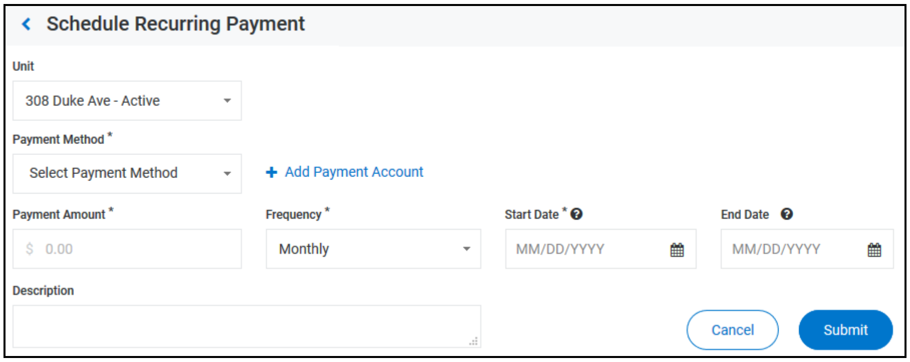
   - **First Name**
   - **Last Name**
   - **Billing Address**
   - **Address 2** (optional)
   - **City**
   - **State** (select from the drop-down list)
   - **ZIP/Postal Code**
   - **Birth Date** (optional)
   - **Billing Email** (optional)

4. Click **Save**.

Schedule Recurring Payment

On the **Schedule Recurring Payment** page, you can:

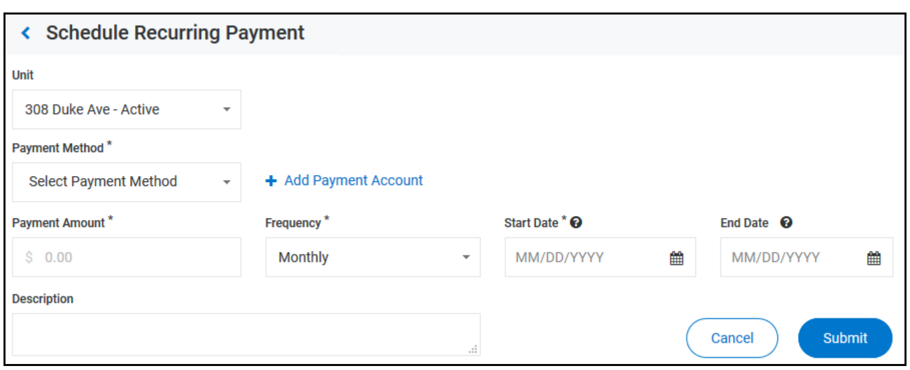
- Set up a recurring payment from an existing payment account (on page 41).
- Add a new payment account (on page 38).



Scheduling a Recurring Payment

To schedule a recurring payment:

1. Open the **Schedule Recurring Payment** page:
   - From the **My Payments** navigation menu item, when you select **Schedule Recurring Payment**.
   - From the **Payment Accounts** page, by clicking **Schedule Recurring Payment**.
   - From the **Scheduled Payments** page, by clicking **Schedule Recurring Payment**.
2. If you have not set up a payment account, the **New Payment Account** page opens. See **Adding a Payment Account** (on page 38) for a description of adding a payment account.
3. If you have a saved payment account, the **Schedule Recurring Payment** page opens.



4. From the **Unit** drop-down list, select the appropriate unit.
5. From the **Payment Method** drop-down list, select the account to make the recurring payments from. You cannot set up a recurring cash payment.

When you select a payment account, the payment account information appears in the **Payment Account** field.

6. To add a payment account, click **Add Payment Account** and follow these steps for **Adding a Payment Account** (on page 38).
7. In the **Payment Amount** text box, type the amount to be paid.
8. From the **Frequency** drop-down list, select **Weekly**, **Monthly**, or **Yearly**.
9. In the **Start Date** calendar field, type or select the day on which to start the recurring payments.
10. In the **End Date** calendar field, type or select the day on which to end the recurring payments.
11. In the **Description** text box, type a description of the recurring payment.

    If your property management company charges a convenience fee for the payment method you selected, the fee amount appears below the Description text box. The convenience fee is added for each instance of the recurring payment.

12. Click **Submit**.

    A **Confirm Payment** dialog appears.

13. If the information in the **Confirm Payment** is correct, click **Save**.

    The **Scheduled Payments** page opens and the recurring payment appears in the **Recurring Payments** list.

Adding a Payment Account

You can open the **New Payment Account** page from several locations:

- From the **Payment Accounts** page:
    - If you do not have a payment account set up, the **New Payment Account** page opens automatically when you select **Payment Accounts** from the **My Payments** navigation menu item.
    - If you do have a payment account set up, you can click **Add Payment Account** to open the **New Payment Account** page and set up another account.
- From the **Make a One-Time Payment** page, by clicking **Add Payment Account**.
- From the **Schedule Recurring Payment** page:
    - If you do not have a payment account set up, the **New Payment Account** page opens automatically when you select **Schedule Recurring Payment** from the **My Payments** navigation menu item.
    - If you do have a payment account set up, you can click **Add Payment Account** to open the **New Payment Account** page and set up another account.
- From the **Scheduled Payments** page:
    - If you do not have a payment account set up, the **New Payment Account** page opens automatically when you select **View Scheduled Payments** from the **My Payments** navigation menu item.
    - If you do have a payment account set up, you can click **Add Payment Account** to open the **New Payment Account** page and set up another account.

Depending on how the property management team has set up the Tenant Portal, you can set up an E-Check account, a credit card account, or both:

- To set up an E-Check payment account, select **E-Check**, then follow the instructions in **Adding an E-Check Payment Account** (on page 39).
- To set up a credit card payment account, select **Credit Card**, then follow the instructions in **Adding a Credit Card Payment Account** (on page 40).

Adding an E-Check Payment Account

To add an E-Check payment account:

1. Select **E-Check**.
2. Provide the **Account Information**:
   - **Bank Name**
   - **Account Number**
   - **Re-Enter Account Number**
   - **Routing Number**

     The system verifies that the routing number is an active routing number. Incorrect account information can result in a returned check.
   - **Account Nickname**
3. From the **Account Type** drop-down list, select the type of account to use, **Checking** or **Savings**.
4. Provide the **Billing Information**:
   - **First Name**
   - **Last Name**
   - **Billing Address**
   - **Address 2** (optional)
   - **City**
   - **State** (select from the drop-down list)
   - **ZIP/Postal Code**
   - **Birth Date** (optional)
   - **Billing Email** (optional)
5. Click **Save**.

Adding a Credit Card Payment Account

To add a credit card payment account:

1. Select **Credit Card**.

   The fields on the **New Payment Account** page change to match the credit card fields.

2. Provide the **Account Information**:

   - **Card Number**
   - **Card Expiration**
   - **Account Nickname**

3. Provide the **Billing Information**:

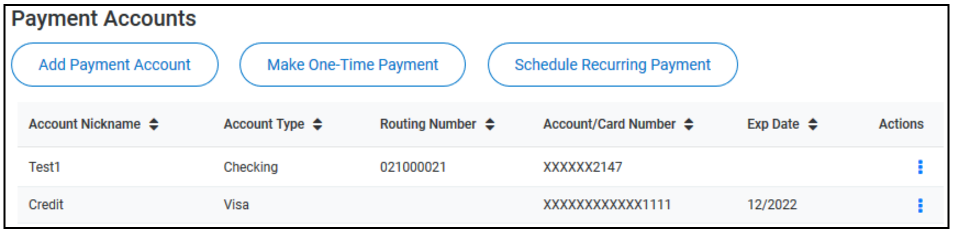
   - **First Name**
   - **Last Name**
   - **Billing Address**
   - **Address 2** (optional)
   - **City**
   - **State** (select from the drop-down list)
   - **ZIP/Postal Code**
   - **Birth Date** (optional)
   - **Billing Email** (optional)

4. Click **Save**.

Payment Accounts

On the **Payment Accounts** page, you can:

- View and manage a list of your payment accounts (on page 47).
- Add a payment account (on page 38).
- Make a one-time payment (on page 51).
- Schedule a recurring payment (on page 41).

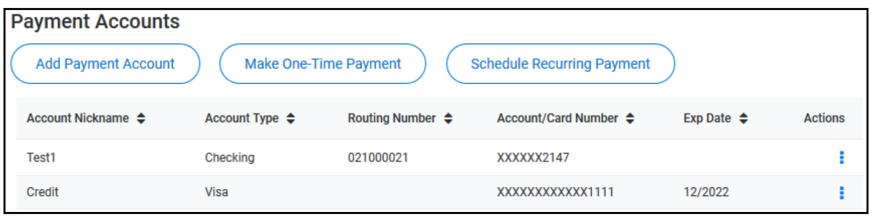


Viewing and Managing Your Payment Accounts

A list of your payment accounts appears on the **Payment Accounts** page.

For each account, this information appears:

- **Account Nickname**: The name you gave the account when you created it.
- **Account Type**: The payment method for the account:
  - For bank accounts, either **Checking** or **Savings**, as indicated when you created at the account.
  - For credit card accounts, the type of credit card, as determined by the credit card number.
- **Routing Number**: For bank accounts, the bank's routing number.
- **Account/Card Number**: For bank accounts, the account number. For credit cards, the card number.
- **Exp Date**: For credit card accounts, the card's expiration date.
- **Actions**: Click to manage the account.



To delete an account, click the **Actions**  icon for the account, then select **Del**.

Adding a Payment Account

You can open the **New Payment Account** page from several locations:

- From the **Payment Accounts** page:
  - If you do not have a payment account set up, the **New Payment Account** page opens automatically when you select **Payment Accounts** from the **My Payments** navigation menu item.
  - If you do have a payment account set up, you can click **Add Payment Account** to open the **New Payment Account** page and set up another account.
- From the **Make a One-Time Payment** page, by clicking **Add Payment Account**.
- From the **Schedule Recurring Payment** page:
  - If you do not have a payment account set up, the **New Payment Account** page opens automatically when you select **Schedule Recurring Payment** from the **My Payments** navigation menu item.
  - If you do have a payment account set up, you can click **Add Payment Account** to open the **New Payment Account** page and set up another account.
- From the **Scheduled Payments** page:
  - If you do not have a payment account set up, the **New Payment Account** page opens automatically when you select **View Scheduled Payments** from the **My Payments** navigation menu item.
  - If you do have a payment account set up, you can click **Add Payment Account** to open the **New Payment Account** page and set up another account.

Depending on how the property management team has set up the Tenant Portal, you can set up an E-Check account, a credit card account, or both:

- To set up an E-Check payment account, select **E-Check**, then follow the instructions in **Adding an E-Check Payment Account** (on page 39).
- To set up a credit card payment account, select **Credit Card**, then follow the instructions in **Adding a Credit Card Payment Account** (on page 40).

Adding an E-Check Payment Account

To add an E-Check payment account:

1. Select **E-Check**.
2. Provide the **Account Information**:
    - **Bank Name**
    - **Account Number**
    - **Re-Enter Account Number**
    - **Routing Number**

      The system verifies that the routing number is an active routing number. Incorrect account information can result in a returned check.
    - **Account Nickname**
3. From the **Account Type** drop-down list, select the type of account to use, **Checking** or **Savings**.
4. Provide the **Billing Information**:
    - **First Name**
    - **Last Name**
    - **Billing Address**
    - **Address 2** (optional)
    - **City**
    - **State** (select from the drop-down list)
    - **ZIP/Postal Code**
    - **Birth Date** (optional)
    - **Billing Email** (optional)
5. Click **Save**.

Adding a Credit Card Payment Account

To add a credit card payment account:

1. Select **Credit Card**.

   The fields on the **New Payment Account** page change to match the credit card fields.

2. Provide the **Account Information**:

   - **Card Number**
   - **Card Expiration**
   - **Account Nickname**

3. Provide the **Billing Information**:

   - **First Name**
   - **Last Name**
   - **Billing Address**
   - **Address 2** (optional)
   - **City**
   - **State** (select from the drop-down list)
   - **ZIP/Postal Code**
   - **Birth Date** (optional)
   - **Billing Email** (optional)

4. Click **Save**.

Make a One-Time Payment

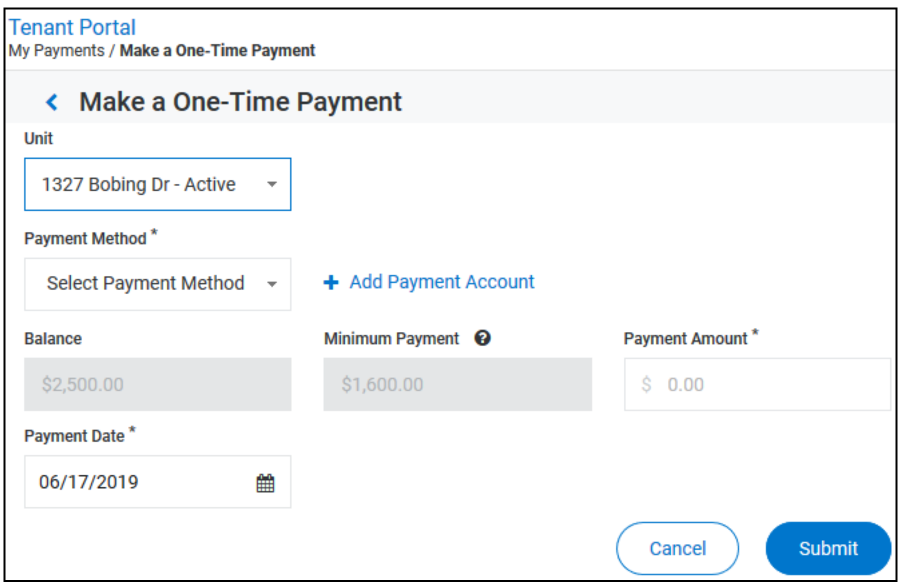
On the **Make a One-Time Payment** page, you can:

- Make a one-time payment via E-Check or Credit Card (on page 52).
- Make a one-time payment using cash (on page 54).
- Click **Add Payment Account** (on page 38) to add a new payment account.

You can open the **Make a One-Time Payment** page from several locations:

- From the **My Payments** navigation menu item, by selecting **Make a One-Time Payment**.
- From the **Payment Accounts** page, by clicking **Make One-Time Payment**.
- From the **Scheduled Payments** page, by clicking **Make One-Time Payment**.

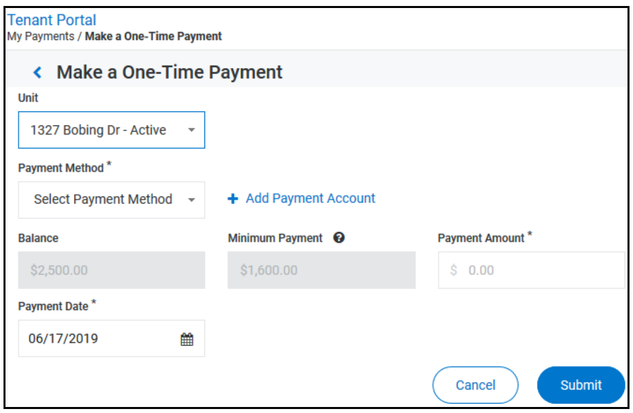
If you do not have a payment account set up, you can only make cash one-time payments (if your property management company allows cash payments).



Make a One-Time Payment - E-Check or Credit Card

To authorize a one-time E-Check or Credit Card payment:

1. Open the **Make a One-Time Payment** page from one of these locations:
   - From the **My Payments** navigation menu item, by selecting **Make a One-Time Payment**.
   - From the **Payment Accounts** page, by clicking **Make One-Time Payment**.
   - From the **Scheduled Payments** page, by clicking **Make One-Time Payment**.
2. If you have not set up a payment account, the **New Payment Account** page opens. See **Adding a Payment Account** (on page 38) for a description of adding a payment account.
3. If you have a saved payment account, the **Make a One-Time Payment** page opens.



4. From the **Unit** drop-down list, select the unit to make the payment for.
5. From the **Payment Method** drop-down list, select the name of the account to make the payment from. To make a cash payment (if it is available to you), follow the instructions in **Make a One-Time Payment - Cash** (on page 54).

   The fields on the **Make a One-Time Payment** page change to match the account type you choose.
6. If you selected an account associated with a credit card, type the credit card's CVV in the **CVV** text box.
7. In the **Payment Amount** text box, type the amount to pay. The payment amount must be at least as much as the amount in the **Minimum Payment** field.

   If there are convenience or service fees associated with the payment type you selected, they will automatically be added to the Payment Amount you provide.
8. Click **Submit**.

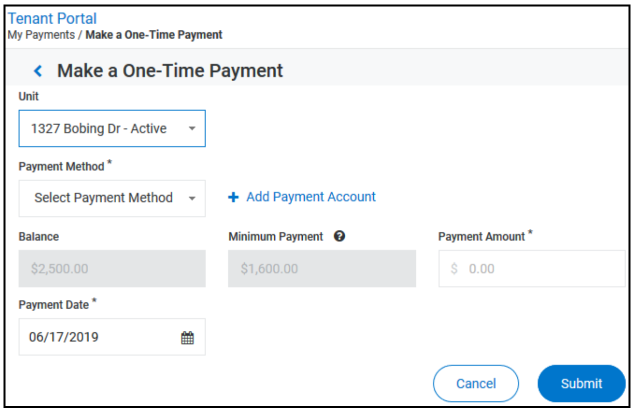
A **Confirm Payment** dialog opens and displays the **Payment Amount** and the **Total Amount** (the **Payment Amount** plus any convenience fees).

9. To approve the payment, click **Pay**.

   A receipt appears. The receipt includes a confirmation message, the details of your payment, and a confirmation number.

Make a One-Time Payment - Cash

You can use the **Cash** option in the **Payment Method** drop-down list (if it is available to you), to make a one-time cash payment.

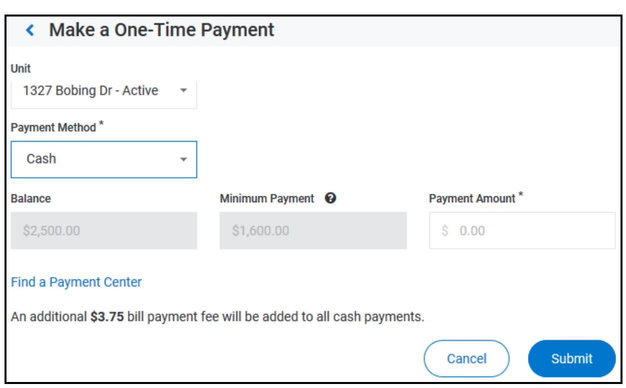


To make a one-time cash payment:

1. Open the **Make a One-Time Payment** page from one of these locations:
   - From the **My Payments** navigation menu item, by selecting **Make a One-Time Payment**.
   - From the **Payment Accounts** page, by clicking **Make One-Time Payment**.
   - From the **Scheduled Payments** page, by clicking **Make One-Time Payment**.
2. On the **Make a One-Time Payment** page, from the **Unit** drop-down list, select the unit to make the payment for.
3. From the **Payment Method** drop-down list, select **Cash**.

   If Cash is not available, your property management company does not permit cash payments.

   The fields on the **Make a One-Time Payment** page change to match the requirements of a cash payment.

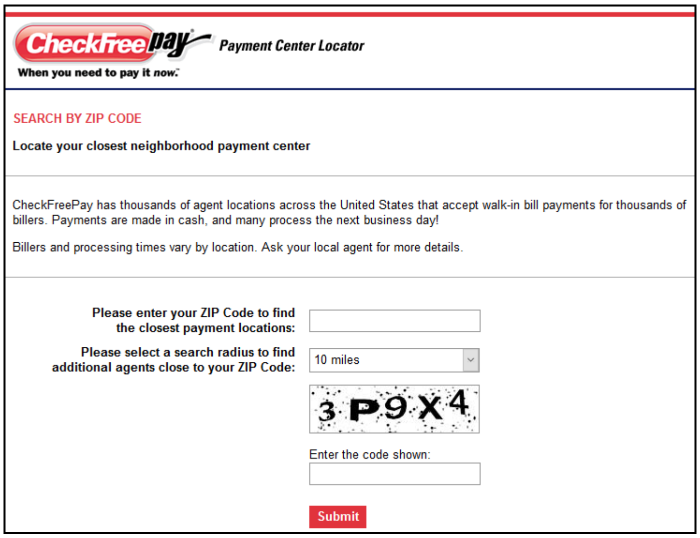


4. In the **Payment Amount** text box, type the amount of the payment.

Depending on your property management company's configuration, you may not be able to make partial payments.

5. To locate a payment center to make your cash payment, click **Find a Payment Center**.

   The **Payment Center Locator** page opens.



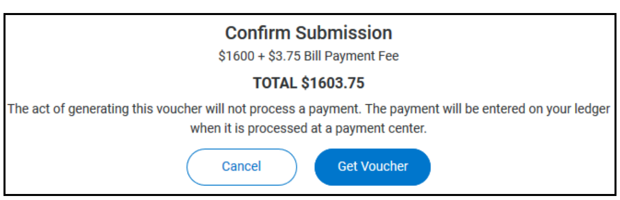
6. Complete the fields on the **Payment Center Locator** page then submit your responses.

   A list of payment centers appears. You can deliver your payment to any of the centers in the list.

7. Click **Submit**.

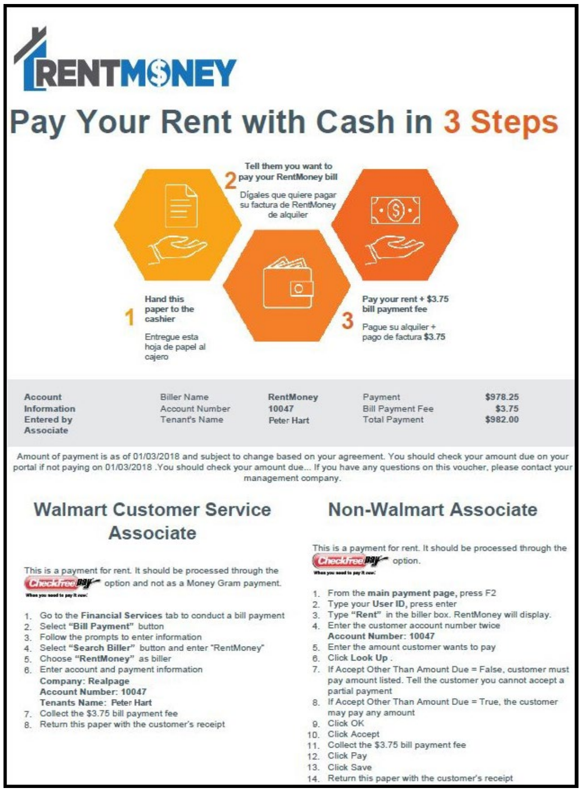
There is a bill payment fee associated with all cash payments.

   A confirmation box opens.



8. Review the information, then click **Get Voucher** when the information is correct.

The **RentMoney Voucher** opens.



RENTMONEY

Pay Your Rent with Cash in 3 Steps

1 Hand this paper to the cashier

Entregue esta hoja de papel al cajero

2 Tell them you want to pay your RentMoney bill

Dígales que quiere pagar su factura de RentMoney de alquiler

3 Pay your rent + $3.75 bill payment fee

Pague su alquiler + pago de factura $3.75

Account Information Entered by Associate	Biller Name	RentMoney	Payment	$978.25
	Account Number	10047	Bill Payment Fee	$3.75
	Tenant's Name	Peter Hart	Total Payment	$982.00

Amount of payment is as of 01/03/2018 and subject to change based on your agreement. You should check your amount due on your portal if not paying on 01/03/2018 .You should check your amount due... If you have any questions on this voucher, please contact your management company.

Walmart Customer Service Associate

This is a payment for rent. It should be processed through the CheckFree pay option and not as a Money Gram payment.

When you need to pay it now!

1. Go to the **Financial Services** tab to conduct a bill payment
2. Select **"Bill Payment"** button
3. Follow the prompts to enter information
4. Select **"Search Biller"** button and enter "RentMoney"
5. Choose **"RentMoney"** as biller
6. Enter account and payment information
   Company: Realpage
   Account Number: 10047
   Tenants Name: Peter Hart
7. Collect the $3.75 bill payment fee
8. Return this paper with the customer's receipt

Non-Walmart Associate

This is a payment for rent. It should be processed through the CheckFree pay option.

When you need to pay it now!

1. From the **main payment page,** press F2
2. Type your **User ID,** press enter
3. Type **"Rent"** in the biller box. RentMoney will display.
4. Enter the customer account number twice
   Account Number: 10047
5. Enter the amount customer wants to pay
6. Click **Look Up** .
7. If Accept Other Than Amount Due = False, customer must pay amount listed. Tell the customer you cannot accept a partial payment
8. If Accept Other Than Amount Due = True, the customer may pay any amount
9. Click OK
10. Click Accept
11. Collect the $3.75 bill payment fee
12. Click Pay
13. Click Save
14. Return this paper with the customer's receipt

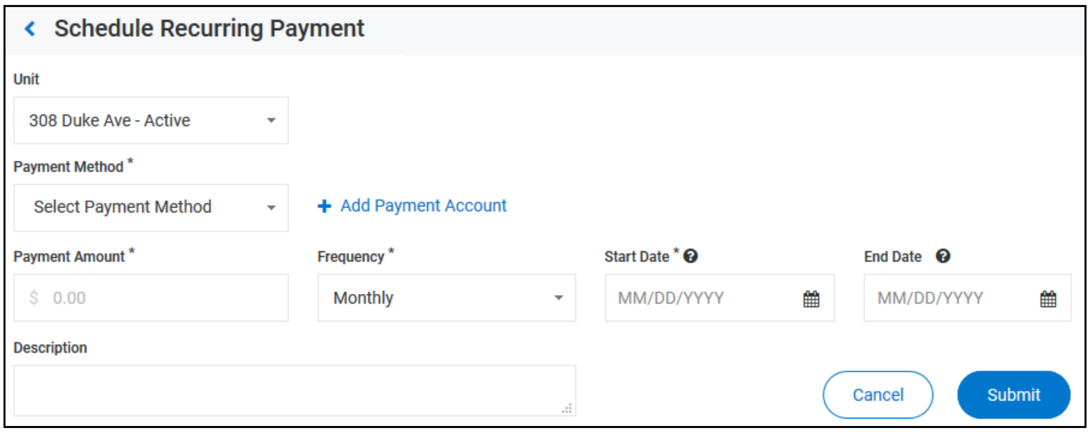
9. To complete your RentMoney payment, follow the steps included on the voucher.
10. You can print the voucher and give it to the payment center associate, or you can give the associate the account and payment information included on the voucher:
    - **Biller Name**: RentMoney
    - **Account Number**: Unique ID number created for this RentMoney payment
    - **Tenant's Name**: Your name
    - **Payment**: Amount of the payment without the bill payment fee.
    - **Bill Payment Fee**: Amount of the bill payment fee.
    - **Total Payment**: Total of the payment amount and the bill payment fee.

If you are making the RentMoney payment using the Tenant Portal Mobile Application, you can give the associate the account and payment information, or you can show the associate the voucher on your phone or mobile device.

Scheduling a Recurring Payment

To schedule a recurring payment:

1. Open the **Schedule Recurring Payment** page:
   - From the **My Payments** navigation menu item, when you select **Schedule Recurring Payment**.
   - From the **Payment Accounts** page, by clicking **Schedule Recurring Payment**.
   - From the **Scheduled Payments** page, by clicking **Schedule Recurring Payment**.
2. If you have not set up a payment account, the **New Payment Account** page opens. See **Adding a Payment Account** (on page 38) for a description of adding a payment account.
3. If you have a saved payment account, the **Schedule Recurring Payment** page opens.



4. From the **Unit** drop-down list, select the appropriate unit.
5. From the **Payment Method** drop-down list, select the account to make the recurring payments from. You cannot set up a recurring cash payment.

   When you select a payment account, the payment account information appears in the **Payment Account** field.
6. To add a payment account, click **Add Payment Account** and follow these steps for **Adding a Payment Account** (on page 38).
7. In the **Payment Amount** text box, type the amount to be paid.
8. From the **Frequency** drop-down list, select **Weekly**, **Monthly**, or **Yearly**.
9. In the **Start Date** calendar field, type or select the day on which to start the recurring payments.
10. In the **End Date** calendar field, type or select the day on which to end the recurring payments.
11. In the **Description** text box, type a description of the recurring payment.

If your property management company charges a convenience fee for the payment method you selected, the fee amount appears below the Description text box. The convenience fee is added for each instance of the recurring payment.

12. Click **Submit**.

    A **Confirm Payment** dialog appears.

13. If the information in the **Confirm Payment** is correct, click **Save**.

    The **Scheduled Payments** page opens and the recurring payment appears in the **Recurring Payments** list.

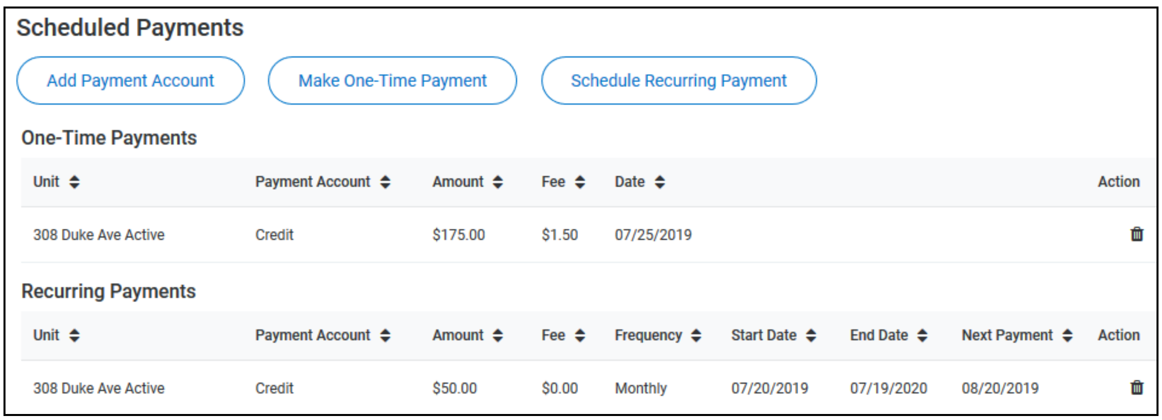
View Scheduled Payments

The **Scheduled Payments** page is made up of two sections:

- *One-Time Payments* section: Lists upcoming one-time payments.
- *Recurring Payments* section: Lists recurring payments.

On the **Scheduled Payments** page, you can:

- View and manage upcoming one-time payments (on page 60).
- View and manage established recurring payments (on page 61).
- Add a payment account (on page 38).
- Make a one-time payment (on page 51).
- Schedule a recurring payment (on page 41).



Viewing Scheduled Payments

For each upcoming one-time payment in the **One-Time Payments** list, this information is included:

- **Unit**: The unit for which the payment is scheduled.
- **Payment Account**: Account that will be used to make the payment.
- **Amount**: Payment amount.
- **Fee**: Convenience or service fee associated with the payment account you selected.
- **Date**: Date on which the payment will be made.
- **Action**: In the **Action** column, you can click the Delete icon to delete the upcoming one-time payment.

One-Time Payments

Unit	Payment Account	Amount	Fee	Date	Action
308 Duke Ave Active	Credit	$175.00	$1.50	07/25/2019	

Click a column title, other than **Action**, to sort the list by that column.

Viewing and Managing Recurring Payments

For each recurring payment in the **Recurring Payments** list, this information is included:

- **Unit**: The unit for which the payment is scheduled.
- **Payment Account**: Account that will be used to make the payment.
- **Amount**: Payment amount.
- **Fee**: Convenience or service fee associated with the payment account you selected.
- **Frequency**: How often the payment recurs.
- **Start Date**: Day on which the recurring payments started or will start.
- **End Date**: Day on which the recurring payments will end.
- **Next Payment**: Date on which the payment will be made.
- **Action**: In the **Action** column, you can click the **Delete** icon to delete the recurring payment.

Recurring Payments

Unit	Payment Account	Amount	Fee	Frequency	Start Date	End Date	Next Payment	Action
308 Duke Ave Active	Credit	$50.00	$0.00	Monthly	07/20/2019	07/19/2020	08/20/2019	

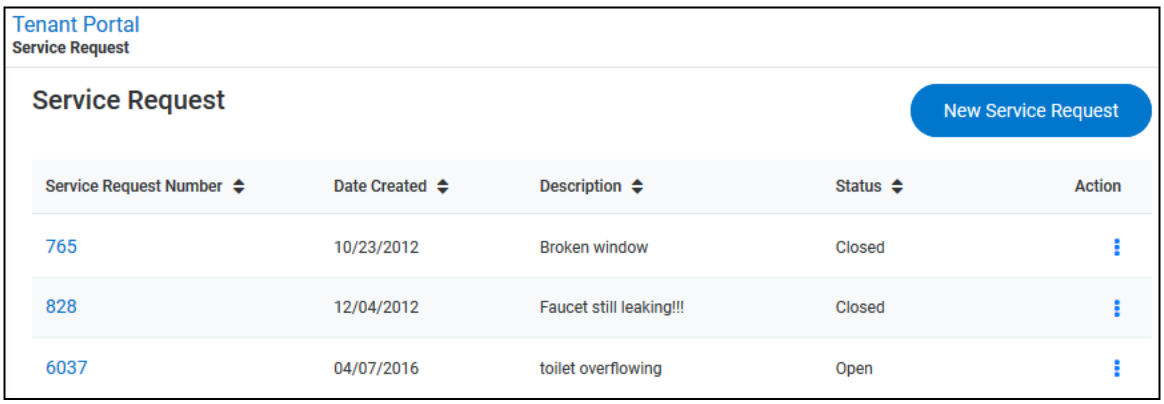
Click a column title, other than **Action**, to sort the list by that column.

CHAPTER 4

Service Requests

On the **Service Request** page, you can:

- View the list of service requests (on page 64).
- View the details of a service request (on page 18).
- Edit a service request (on page 22).
- Cancel a service request (on page 24).
- Create a new service request (on page 16).



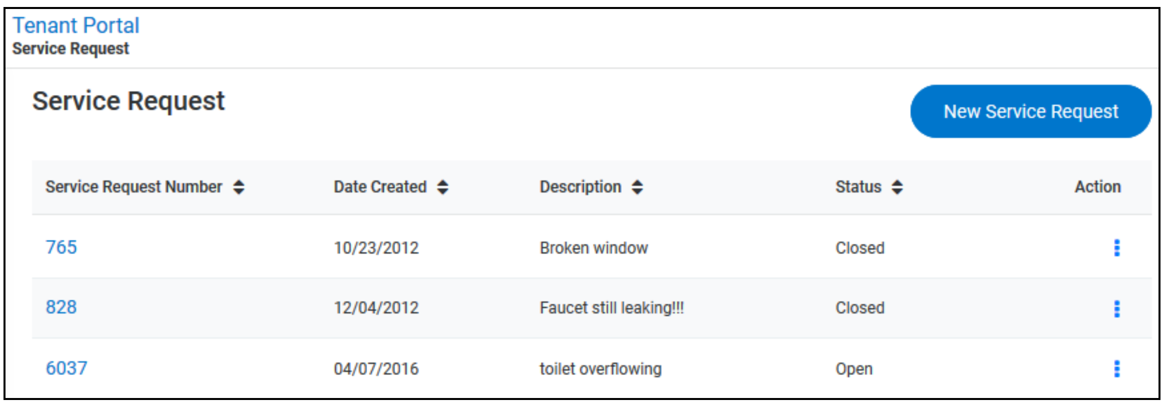
In This Chapter

Viewing the List of Service Requests

The list of services requests on the **Service Requests** page contains a list of your service requests.

For each service request in the list, this information is included:

- **Service Request Number**: Service request's tracking number. Click a service request number link to open the **Service Request Details** (on page 18) page for a service request.
- **Date Created**: Date on which the service request was created.
- **Description**: Description of the problem that spurred the service request.
- **Status**: Current state of the service request: **Open**, **Closed**, or **Canceled**.
- **Action**: Click the **Action** icon to:
  - View the details of a service request in any status (on page 18).
  - Edit an open request (on page 22).
  - Cancel an open request (on page 24).



Click a column header to sort the list of service requests.

Service Request Details

The **Service Request Details** page is made up of three sections:

- *Request Details* section - In this section, you can:
  - View the details of a service request (on page 19).
  - Create a new service request (on page 16).
  - Edit a service request (on page 22).
  - Cancel a service request (on page 24).
- *Maintenance Documents* section - In this section, you can:
  - View documents attached to the service request (on page 26).
  - Attach a document to the service request (on page 27).
- *Conversations* section - In this section, you can:
  - View a list of conversations concerning the service request (on page 29).
  - Add a new message to an existing conversation (on page 30).
  - Create a new conversation for the service request (on page 31).

To open the **Service Request Details** page, from the **Service Requests** page or the *Open Service Requests* section of the **My Account** page, click the **Service Request Number** link for a service request.

Request Details Section

In the *Request Details* section of the **Service Request Details** page, you can:

- View the details of a service request (on page 19).
- Create a new service request (on page 16).
- Edit a service request (on page 22).
- Cancel a service request (on page 24).

Viewing Service Request Details

In the *Request Details* section of the **Service Request Details** page, you can view the details of a specific service request.

The request details include:

- **Status**: Indicates whether or not the service request is in progress (**Open**) or has been completed (**Closed**).
- **Specific Location in Unit**: Location details provided when the service request was created or edited.
- **Description**: Detailed explanation of the issue that prompted the service request.
- **Requestor**: Person who submitted the service request.
- **Priority**: Urgency assigned to the service request.
- **Preferred Time to Enter**: Date and time the tenant would like the service to occur.
- **Date Created**: Date the service request was submitted.
- **Start Date**: Date work started on the service request.
- **Completed Date**: Date work was on the service request was completed.
- **Closing Comments**: Comments provided by the person who completed the request.

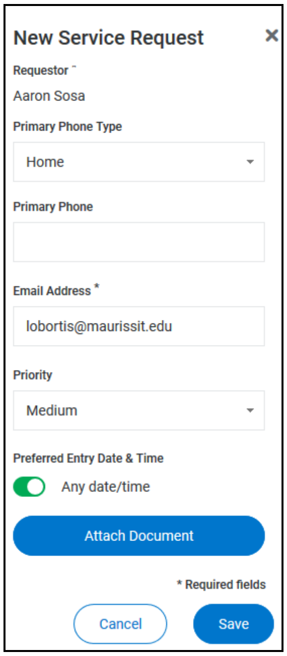
If a field in the *Request Details* section is blank, no data has been entered for that field.

Creating a New Service Request

To create a new service request in the New View Tenant Portal:

1. You can open the **New Service Request** pane from different locations:
    - From the **My Service Requests** page, click **New Service Request**.
    - From the **My Account** page, click **New Request** in the *Open Service Requests* section.
    - From the **Actions** drop-down menu on the **My Account** page, select **New Service Request**.
    - From the **Service Request Details** page, click **New Service Request**.

The **New Service Request** pane opens.



2. From the **Building/Unit** drop-down list, select the location for the service request.
3. In the **Specific Location** text box, provide additional details regarding the location of the maintenance problem.
4. In the **Description** text box, type a detailed description of the problem.
5. From the **Primary Phone Type** drop-down list, select the type of phone number you are providing for the request: **Mobile**, **Work**, or **Home**.
6. In the **Primary Phone** text box, type the phone number to use for this request.
7. The **Email Address** text box is automatically populated with the email address associated with your account. To change the email, type your changes in the text box.
8. From the **Priority** drop-down list, select the urgency of the service request.
9. In the *Preferred Entry Date & Time* section, configure the entry date and time:
   a) To indicate that any time and date are acceptable, move the **Any Date/Time** toggle switch to the right.
   b) To specify a preferred entry time, move the **Any Date/Time** toggle switch to the left. In the date and time fields that appear:
      - In the **Preferred Entry Date** calendar box, type or select the date on which you would like the service to be performed.
      - In the **Preferred Time to Enter** date box, type or select the time at which you would like the service to be performed.

10. To attach a document (including image files), click Attach Document, then use the browser's file upload dialog box to navigate to the file to attach.
11. When all the fields are complete, click **Save**.
12. If you added a new phone number or email address, a dialog box appears and you must indicate whether or not your profile should be updated to include your changes.

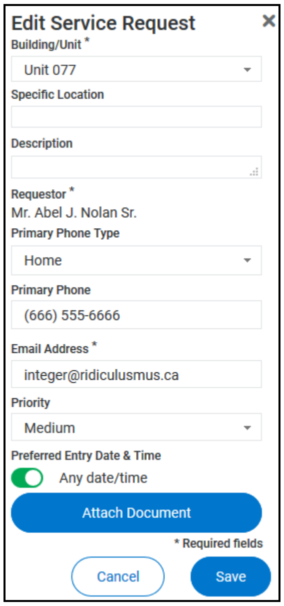
    The new service request is created and appears in the list of open service requests.

Editing a Service Request

To edit a service request:

1. From the **Service Request Details** page, click **Edit**.

   The **Edit Service Request** pane opens.

2. From the **Building/Unit** drop-down list, select the location for the service request.
3. In the **Specific Location** text box, provide additional details regarding the location of the maintenance problem.
4. In the **Description** text box, type a detailed description of the problem.
5. From the **Primary Phone Type** drop-down list, select the type of phone number you are providing for the request: **Mobile**, **Work**, or **Home**.
6. In the **Primary Phone** text box, type the phone number to use for this request.
7. The **Email Address** text box is automatically populated with the email address associated with your account. To change the email, type your changes in the text box.
8. From the **Priority** drop-down list, select the urgency of the service request.
9. In the *Preferred Entry Date & Time* section, configure the entry date and time:

   a) To indicate that any time and date are acceptable, move the **Any Date/Time** toggle switch to the right.

b) To specify a preferred entry time, move the **Any Date/Time** toggle switch to the left. In the date and time fields that appear:

- In the **Preferred Entry Date** calendar box, type or select the date on which you would like the service to be performed.
- In the **Preferred Time to Enter** date box, type or select the time at which you would like the service to be performed.

10. To attach a document (including image files), click Attach Document, then use the browser's file upload dialog box to navigate to the file to attach.
11. When all the fields are complete, click **Save**.
12. If you added a new phone number or email address, a dialog box appears and you must indicate whether or not your profile should be updated to include your changes.

    The new service request is created and appears in the list of open service requests.

Cancelling a Service Request

You can cancel a service request from different locations:

- From the **Service Request Details** page, click **Cancel Service Request**.
- In the *Open Service Requests* section on the **My Account** page, select **Cancel** from the **Action** drop-down menu.
- From the **Action** drop-down menu on the **Service Requests** page, select **Cancel**.

Only open service requests can be canceled.

When you cancel a service request, the request's status changes to "Canceled by Tenant".

Canceling a service request is permanent.

Maintenance Documents Section

In the *Maintenance Documents* section of the **Service Request Details** page you can:

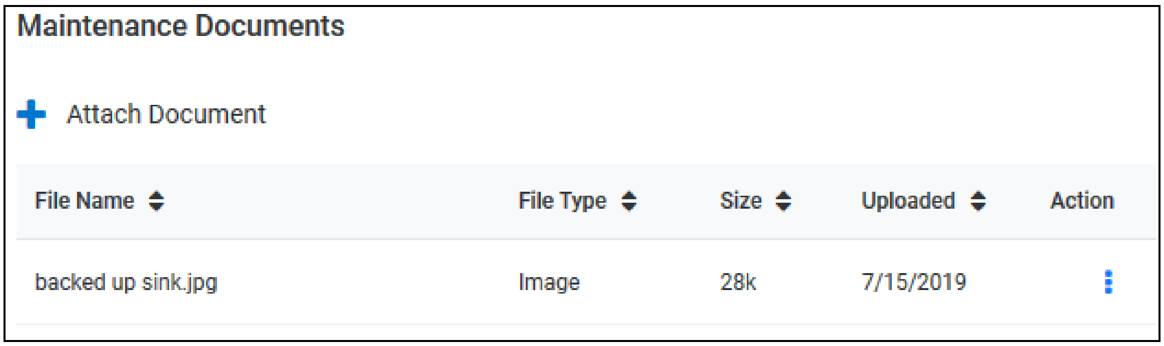
- View a list of documents attached to the service request (on page 25).
- Open and manage documents attached to the service request (on page 26).
- Attach a document to the service request (on page 27).

Viewing the List of Attached Maintenance Documents

In the *Maintenance Documents* section of the **Service Request Details** page, you can view the details of a specific document attached to the service request.

The document details include:

- **File Name**: Name of the attached document.
- **File Type**: Type of file, as determined by the file extension of the attached document (.jpg, .txt, .pdf, etc.).
- **Size**: File size of the attached document.
- **Action** : Actions available for opening and managing attached documents (on page 26).



Opening and Managing Documents Attached to the Service Request

For each attached document in the *Maintenance Documents* section list on the **Service Request Details** page, you can click the **Action** icon to open the document or delete it.

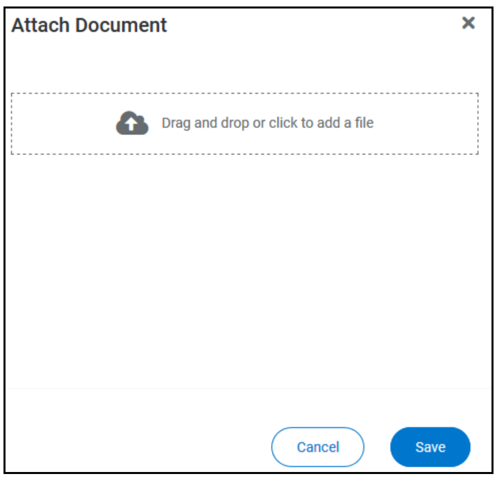
To open an attached document, click the **Action** icon associated with the document, then select **View** from the list that opens. The document opens.

To delete an attached document, click the **Action** icon associated with the document, then select **Del** from the list that opens. The document is removed from the list of attached documents and is no longer attached to the service request.

Attaching a Document to the Service Request

To attach a document to the service request:

1. You can attach a document to a service request from different locations:
   - From the *Maintenance Documents* section of the **Service Request Details** page, click **Attach Document**.
   - From the **Edit Service Request** pane, click **Attach Document**.
2. If you click **Attach Document** in the **Edit Service Request** pane, follow the instructions for attaching a file via your browser's file upload navigator. Skip to Step 5 of this procedure.
3. If you click **Attach Document** in the *Maintenance Documents* section of the **Service Requests Details** page, the **Attach Document** pane opens.



4. Either drag a file into the target area or click the target area to open your browser's file upload navigator.
5. If you drag a file into the target area, the file's name appears in the **Attach Document** pane.
6. If you open the file upload navigator, follow the browser's instructions to locate the file and upload it.
   - In the **Attach Document** pane, the file name appears under the target area.
   - In the **Edit Service Request** pane, the file name appears below the **Attach Document** button.

   You can attach only one file at a time.

7. Click **Save**.

   The document appears in the *Maintenance Documents* list.

Conversations Section of Service Request Details

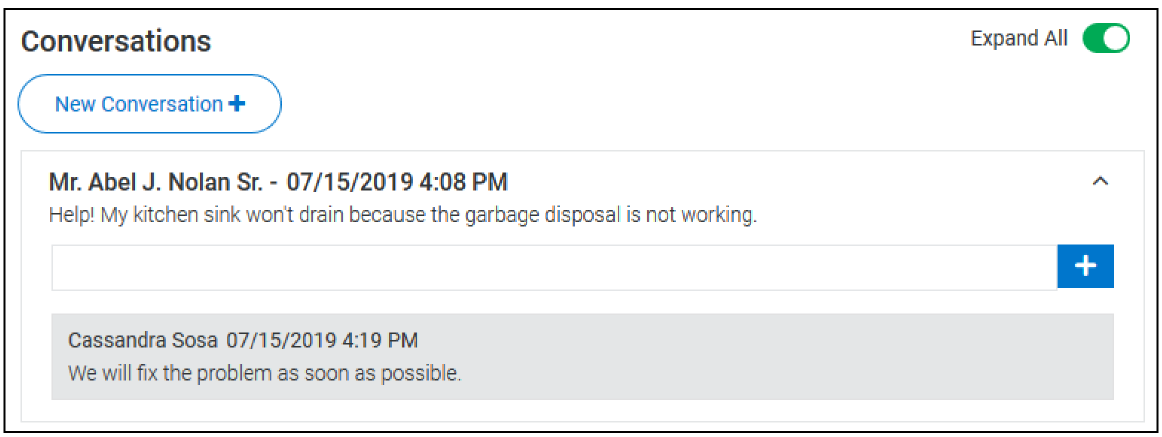
The *Conversations* section of the **Service Request Details** page lists conversations regarding the service request.

Conversations include your comments and responses, and the property managers' comments and responses.

Only conversations related to the service request details you are viewing appear in the *Conversations* section.

In the *Conversations* section, you can:

- View a list of existing conversations related to the service request (on page 29).
- Add a comment to an existing conversation (on page 30).
- Start a new conversation (on page 31).



Viewing the List of Conversations

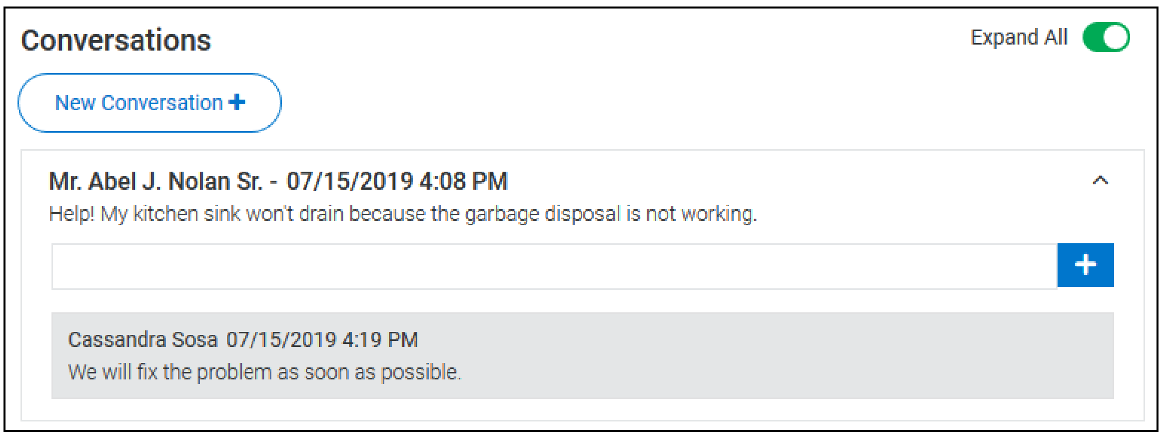
In the *Conversations* sections of the **My Account** page and the **Service Request Details** page, you can view a list of conversations.

On the **My Account page**, all open conversations appear in the list of conversations.

On the **Service Request Details** page, only conversations related to the service request appear in the list of conversations.

Each conversation includes:

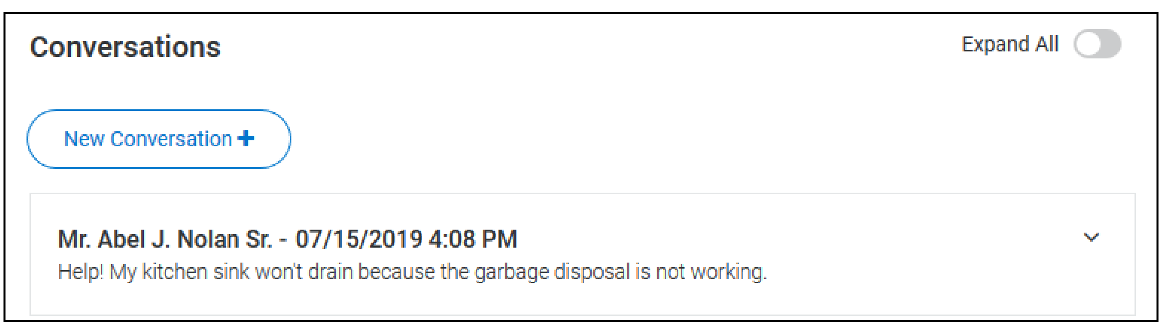
- The name of the person who started the conversation.
- The name of the person who made each comment.
- The date and time the conversation or comment was created.
- A **Comment** text box that allows you to add a comment to the conversation (on page 30).



Expanding and Collapsing Conversations

To expand or collapse a single conversation click the **Expand/Collapse** icon / .

To expand or collapse all conversations, click the **Expand All** toggle switch. The switch turns green when all conversations are expanded.



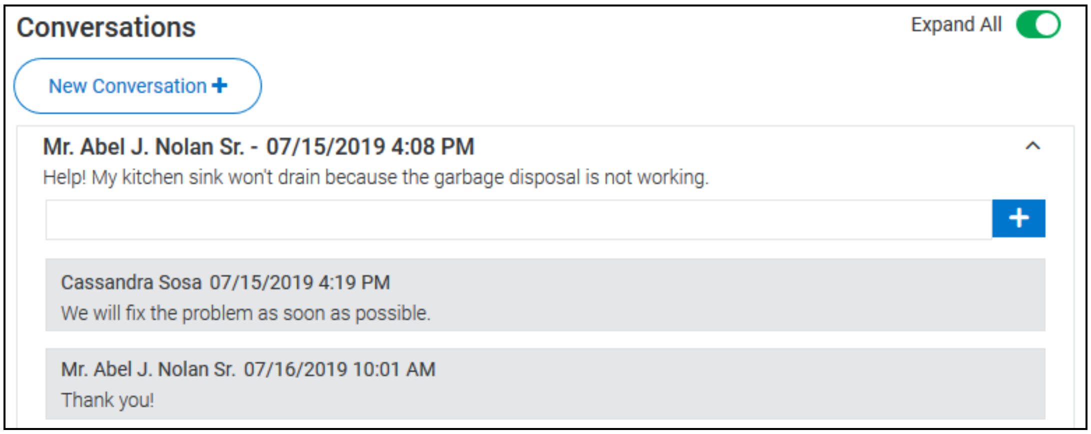
Adding a New Comment to an Existing Conversation

To add a comment to a conversation:

1. In the **Comment** text box, type your message.

2. To post your comment, click the **Add Comment** icon .

   Your comment appears under the next most recent comment and is also sent to the property managers.

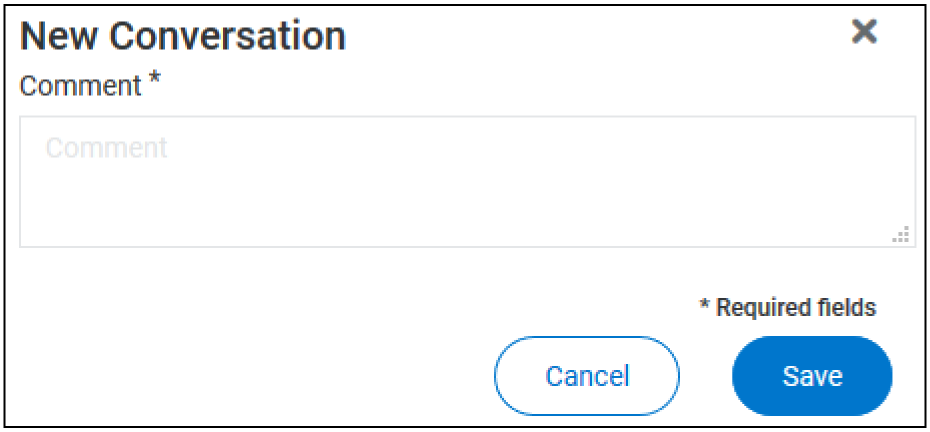


Starting a New Conversation

To start a new conversation:

1. Click **New Conversation**.

   The **New Conversation** pane opens.

2. Type your message in the **Comment** text box.

3. When your message is complete, click **Save** to send the message.

   The conversation is delivered to the property management company and appears in your list of conversations.

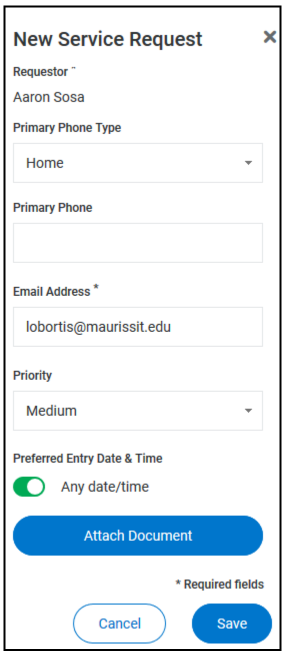
   Your name and lease information are included with the message, and, if you started the new conversation from the **Service Request Details** page, the conversation is associated with the service request and the service request number is included in the message that the property management company receives.

Creating a New Service Request

To create a new service request in the New View Tenant Portal:

1. You can open the **New Service Request** pane from different locations:
   - From the **My Service Requests** page, click **New Service Request**.
   - From the **My Account** page, click **New Request** in the *Open Service Requests* section.
   - From the **Actions** drop-down menu on the **My Account** page, select **New Service Request**.
   - From the **Service Request Details** page, click **New Service Request**.

   The **New Service Request** pane opens.



2. From the **Building/Unit** drop-down list, select the location for the service request.
3. In the **Specific Location** text box, provide additional details regarding the location of the maintenance problem.
4. In the **Description** text box, type a detailed description of the problem.
5. From the **Primary Phone Type** drop-down list, select the type of phone number you are providing for the request: **Mobile**, **Work**, or **Home**.
6. In the **Primary Phone** text box, type the phone number to use for this request.
7. The **Email Address** text box is automatically populated with the email address associated with your account. To change the email, type your changes in the text box.
8. From the **Priority** drop-down list, select the urgency of the service request.

9. In the *Preferred Entry Date & Time* section, configure the entry date and time:
    a) To indicate that any time and date are acceptable, move the **Any Date/Time** toggle switch to the right.
    b) To specify a preferred entry time, move the **Any Date/Time** toggle switch to the left. In the date and time fields that appear:
        - In the **Preferred Entry Date** calendar box, type or select the date on which you would like the service to be performed.
        - In the **Preferred Time to Enter** date box, type or select the time at which you would like the service to be performed.
10. To attach a document (including image files), click Attach Document, then use the browser's file upload dialog box to navigate to the file to attach.
11. When all the fields are complete, click **Save**.
12. If you added a new phone number or email address, a dialog box appears and you must indicate whether or not your profile should be updated to include your changes.

    The new service request is created and appears in the list of open service requests.

CHAPTER 5

Documents

On the **Documents** page, you can view building, lease, or other important documents shared by your management team.

Your management company may or may not include **Inspection** documents.

When a new document is uploaded to the Tenant Portal, you receive an email notification.

The **Documents** page is made up of these sections:

- *Building Documents* section: Documents related to your building.
- *Lease Documents* section: Documents related to your lease.
- *Inspection Documents* section: Documents related to any inspections performed on your unit.
- *Evaluations Documents* section: Documents related to management company evaluations.
- *Other Documents* section: Miscellaneous documents attached to your account.

For each document listed on the Documents page, this information is included:

- **File Name**: Name of the document.
- **Size**: Document's file size.
- **Uploaded**: Date the document was uploaded.
- **Uploaded By**: Name of the person who uploaded the document.
- **Download**: Click the **Download** icon to download a copy of the document. You must have the appropriate software installed on your computer to view downloaded documents.

Documents indicated by an asterisk (*) are eSignature documents that require action from at least one signer. Once an eSignature document is complete, the document on your portal will update with the completed fields visible on the document.

CHAPTER 6

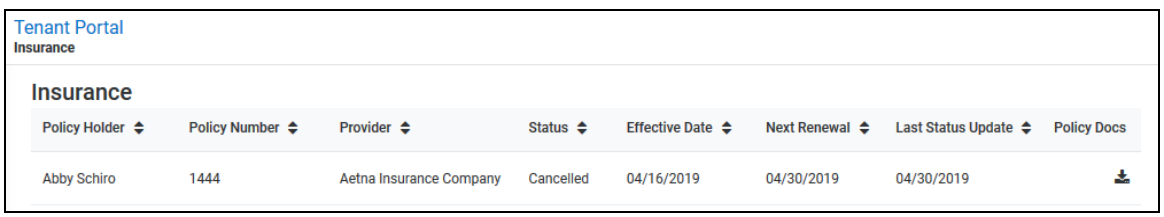
Insurance

On the **Insurance** page, you can view your renter's insurance policy information, if you report your policy to the property management team.

For each insurance policy, this information is included:

- **Policy Holder**: Name of the person who owns the policy.
- **Policy Number**: Policy's reference or ID number.
- **Provider**: Company that provides the policy.
- **Status**: Policy's current state.
- **Effective Date**: Date the policy became or becomes effective.
- **Next Renewal**: Renewal date for the policy.
- **Last Status Update**: Most recent policy status update.
- **Policy Documents**: Click the **Download** icon to download a copy of your policy documents. You must have the appropriate software installed on your computer to view downloaded policy documents.

Click any column header, except Policy Docs, to sort the list of policies by that value.


Tenant Portal
Insurance

Insurance

Policy Holder	Policy Number	Provider	Status	Effective Date	Next Renewal	Last Status Update	Policy Docs
Abby Schiro	1444	Aetna Insurance Company	Cancelled	04/16/2019	04/30/2019	04/30/2019	

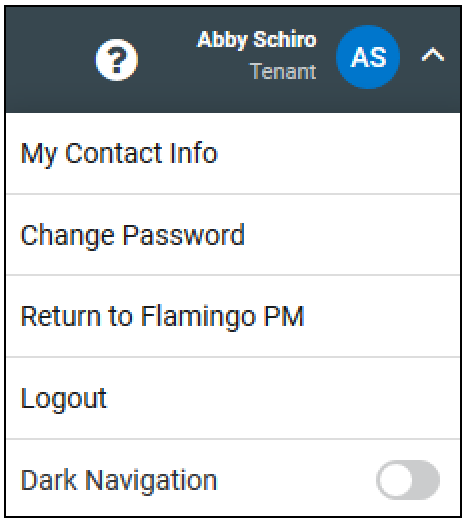
CHAPTER 7

User Menu

The **User Menu** is located in the upper right corner of each page of the New View Tenant Portal.

Click the **User Menu**, to:

- View or Update your contact information (on page 85).
- Change your password. (on page 85)
- Return to your property manager's website. (on page 86)
- Log out of the Tenant Portal. (on page 86)
- Switch to the **Dark Navigation** view. (on page 86)



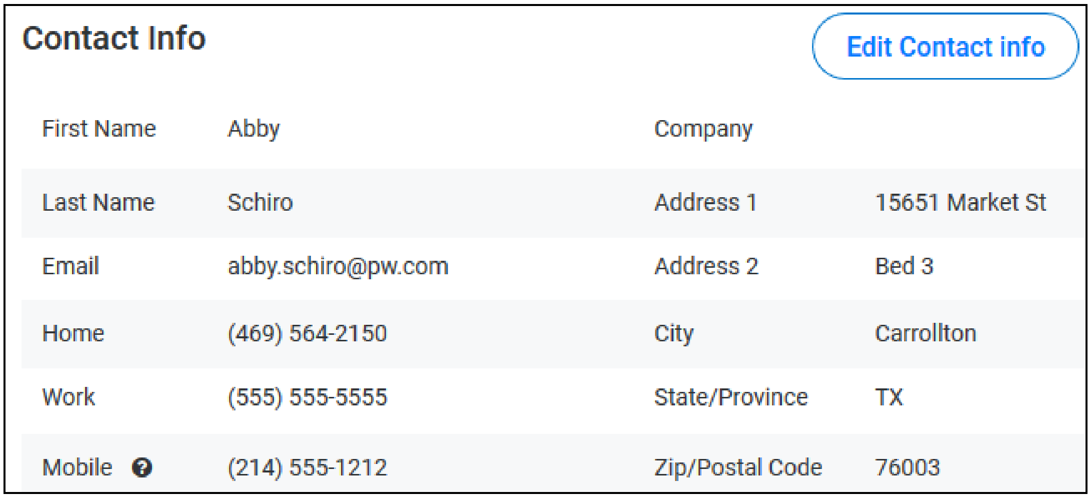
In This Chapter

Viewing or Editing My Contact Info

To open the **Contact Info** page:

1. From the **User Menu**, select **My Contact Info**.

   The **Contact Info** page opens.



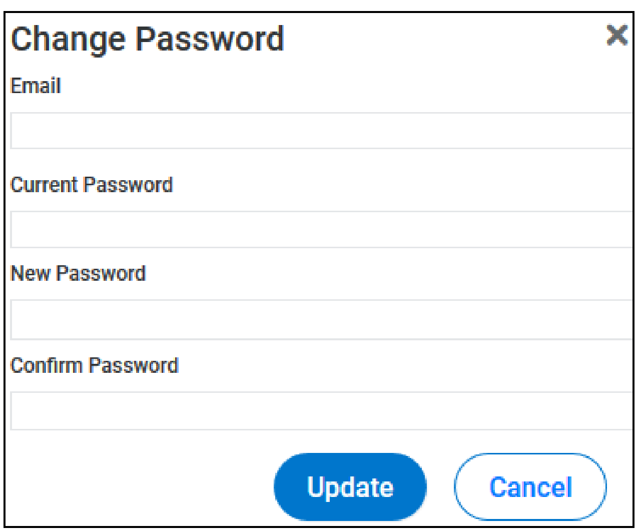
2. Click **Edit Contact Info** to update your contact information.

Changing Your Tenant Portal Password

To change your password from the **User Menu**:

1. From the **User Menu**, select **Change Password**.

   The **Change Password** panel opens.



2. Provide the required information, then click **Update.**

Using Return to...

Your property management company determines the website the **Return to...** link opens. Normally, the **Return to**... link opens the property manager's main website, but your property manager can configure the link to open any web address.

To open the **Return to...** website:

1. Click your name/profile picture.

   The **User Menu** opens.

2. Select **Return to...**

   The configured website opens.

Logging Out of the Tenant Portal

To log out of the New View Tenant Portal from the **User Menu**:

1. Click your name/profile picture.

   The **User Menu** opens.

2. Select **Logout**.

   You are logged out of the New View Tenant Portal and returned to the **Tenant Portal Login** page.

Switching to Dark Navigation

Dark Navigation reverses the text and background colors in the **Navigation Menu**.

To switch to **Dark Navigation**:

1. Click your name/profile picture.

   The **User Menu** opens.

2. Select **Dark Navigation**.

   The view switches to the **Dark Navigation** view, with light text and dark backgrounds in the **Navigation Menu**.

