

Tenant Portal Guide

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PURPOSE

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

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Tenant Portal

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

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

Logging into the Tenant Portal

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

Home

Login Again

Email Address

Password

Sign In

Forgot your password?

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

Sign up

Resident Login

Tenants may log in here to access their online account and submit service requests.

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

Forgot Password

Request a new password

First Name

Last Name

Email

Submit Cancel

Signing up for Tenant Account

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

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

[Sign up](#)

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

Note that the information you submit must match to the information on your lease file.

Signup

Signup to receive a login account

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

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

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

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

Propertyware

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

343 Sansome Ave,
San Francisco, CA 94104

My Account
My Rentals
Maintenance
Documents
Renter's Insurance

Welcome Adam Bishop

[New Service Request](#)

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

Home Phone	(408) 852-4452
Work Phone	(408) 558-9910
Mobile Phone	(408) 996-3737
Email	a.bishop@pw.com

My Open Service Requests [View All](#)

SR #	Date Created	Action
2	05/20/2010	-- Choose --

Conversations [New Conversation](#)

No Conversations



"My apartment was broken into. They took my laptop and video equipment."

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

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

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Propertyware Tenant Portal

Tenant Portal Navigation Tabs

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



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

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

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



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

My Account

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

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

Welcome Adam Bishop

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

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

Summary

Address	Unit	Last Payment Date	Deposit Held	Total Unpaid	Balance	Action
43555 Grimmer Blvd	-		\$0.00	\$0.00	\$0.00	-- Choose -- -- Choose -- View Detail Make Payment

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

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

My Open Service Requests [View All](#)

SR #	Date Created	Action
294	06/13/2011	-- Choose -- -- Choose -- View Detail Edit Cancel

Conversations [New Conversation](#)

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



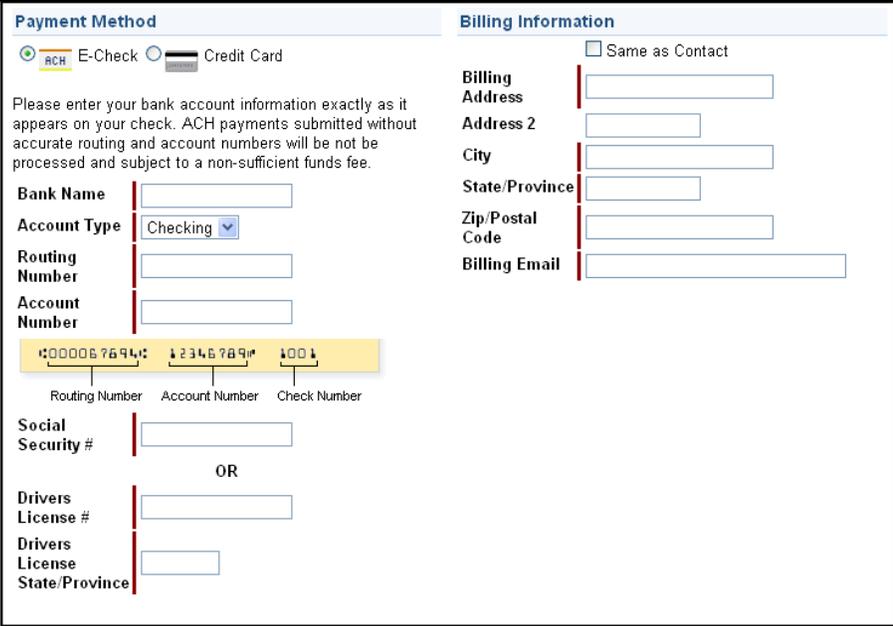
Your landlord's insurance policy doesn't cover your belongings.
 Even if the damage was caused by Mother Nature or your neighbor, your landlord isn't responsible for replacing your things.
[READ MORE >>>](#)

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

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

Making a One-Time Payment

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

<p>From the My Account screen, click the Setup Payment Account button to enter your E-Check or Credit Card information.</p>	
<p>Select your payment method.</p>	 <p>Note: You can store both credit card and E-Check information. The selected radio button determines the payment method that is used as the default method.</p>
<p>If you select the E-Check radio button, you can enter either your driver's license or Social Security number for verification purposes.</p>	 <p>Note: The system verifies that the routing number is an active routing number. Always, double-check the account number to make sure you have entered the correct information. Failure to enter the correct information can result in a returned check.</p>

<p>If you select the Credit Card payment method, you need to complete all of the fields.</p>	
<p>Click the Save button.</p>	

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

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

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

Please Confirm Your Payment

Payment Confirmation

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



Payment Account

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

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

 **Click Confirm Only Once!**

Previous
Confirm

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

Setting up Auto Payments

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

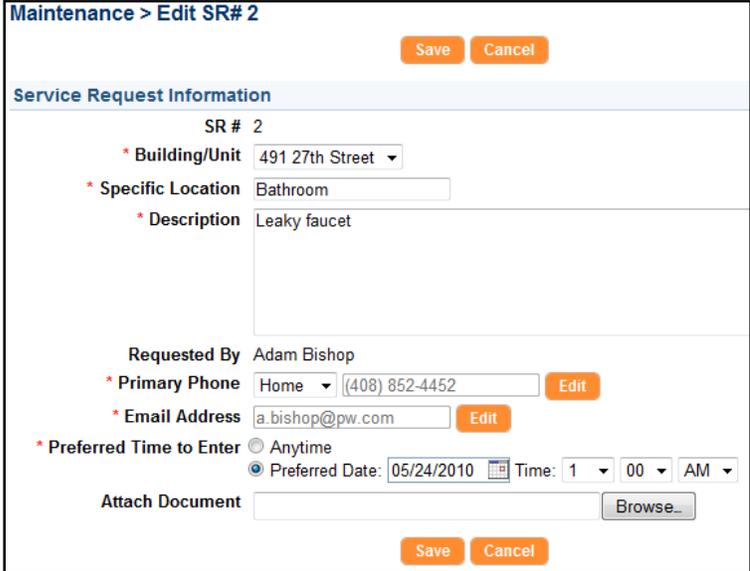
Step	Action/Screen
From the My Account or My Rental screen, click the Make Payment button.	<div style="border: 1px solid #ccc; padding: 10px;"> <p style="margin: 0;">Welcome Mrs. Allison West</p> <div style="text-align: right; margin-top: 10px;"> Make Payment New Service Request Auto Payment:  </div>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

<p>Complete all required fields.</p>	<p>My Rentals > Auto Payments > New</p> <p>Auto Payment Information</p> <p>Rental: 40 Cervantes Blvd Unit 1 - Active</p> <p>Amount: \$600.00 A convenience fee of \$3.00 will be added to your payment.</p> <p>Start Date: 3/1/2010</p> <p>End Date: (Leave blank to continue until Lease termination)</p> <p>Frequency: Monthly</p> <p>Pay Day: 1</p> <p>Description:</p> <p>Please take into consideration that the settlement of your payment will take 3 to 4 business days. To avoid a non-sufficient funds fee, please be sure that your bank account has the sufficient funds to cover your payment.</p> <p>Next Cancel</p>										
<p>Confirm the total amount to be paid each month and click the Save button.</p>	<p>Please Confirm Your Auto Payment</p> <p>Confirm Auto Payment</p> <table border="1"> <tr> <td>Rental</td> <td>40 Cervantes Blvd Unit 1 - Active</td> </tr> <tr> <td>Amount</td> <td>\$600.00</td> </tr> <tr> <td>Convenience Fee</td> <td>\$3.00</td> </tr> <tr> <td>Total Amount</td> <td>\$603.00</td> </tr> <tr> <td>Confirm Total Amount</td> <td>\$603.00</td> </tr> </table> <p>Please take into consideration that the settlement of your payment will take 3 to 4 business days. To avoid a non-sufficient funds fee, please be sure that your bank account has the sufficient funds to cover your payment.</p> <p>Previous Save Cancel</p>	Rental	40 Cervantes Blvd Unit 1 - Active	Amount	\$600.00	Convenience Fee	\$3.00	Total Amount	\$603.00	Confirm Total Amount	\$603.00
Rental	40 Cervantes Blvd Unit 1 - Active										
Amount	\$600.00										
Convenience Fee	\$3.00										
Total Amount	\$603.00										
Confirm Total Amount	\$603.00										

Creating a New Service Request

Creating a service request is an easy way to inform the management team that maintenance is required. You can use this feature to report a maintenance request, choose a time for the repairs, and attach any document that may be relevant to the process.

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

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



Important

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

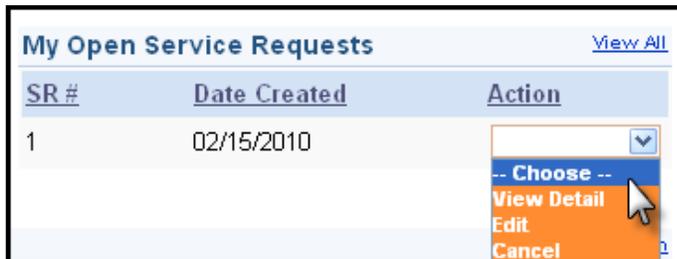


You must correct the following errors:

- Preferred Time to Enter is required
- Description is required

Reviewing, Cancelling, and Editing Existing Service Requests

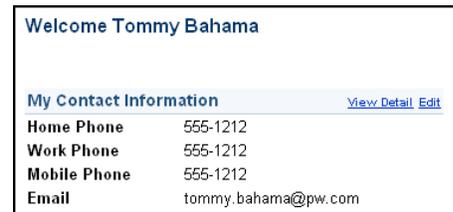
You can view your service requests in the **My Account** screen. You can also review, cancel, and edit the existing service requests. The **My Open Service Requests** portion of the **My Account** screen displays the SR # (service request number), the date the request is created, and provides an **Action**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



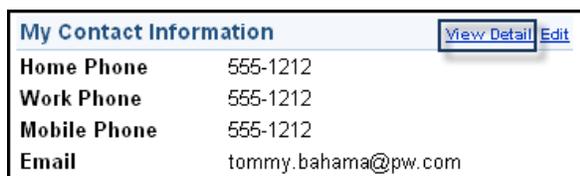
- **View Detail** option directs you to the **Maintenance** screen and lets you review the specifics of the service request.
- **Edit** allows you to edit the fields in the request.
- **Cancel** option cancels the request.

Viewing the Contact Information

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

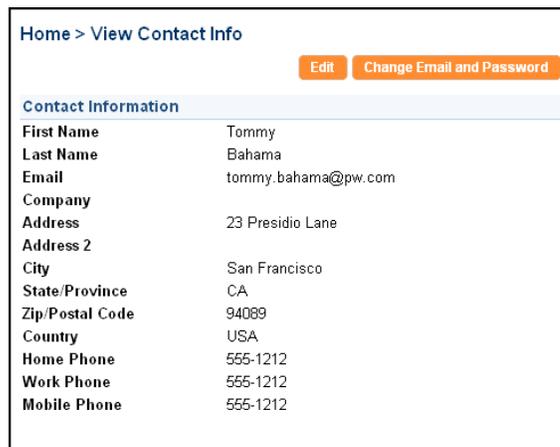


Click the **View Detail** link to view your contact information.



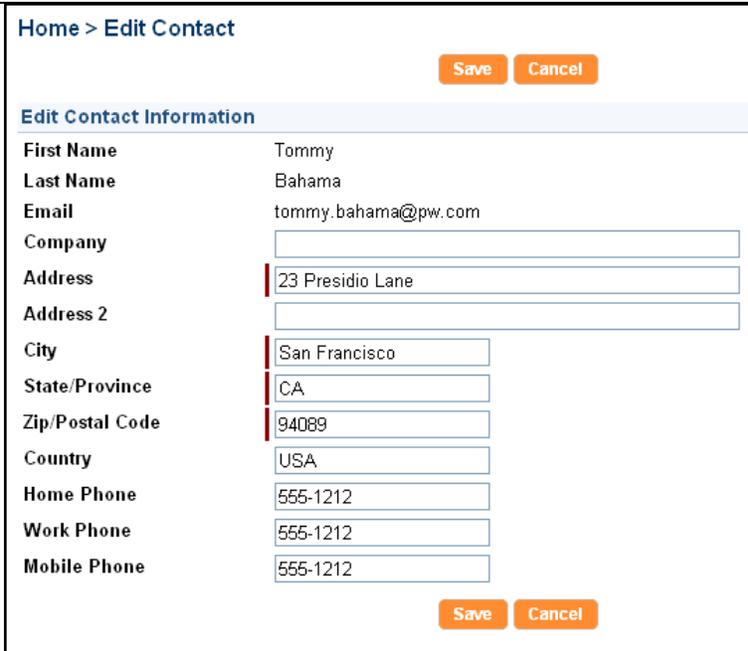
The following information is displayed:

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



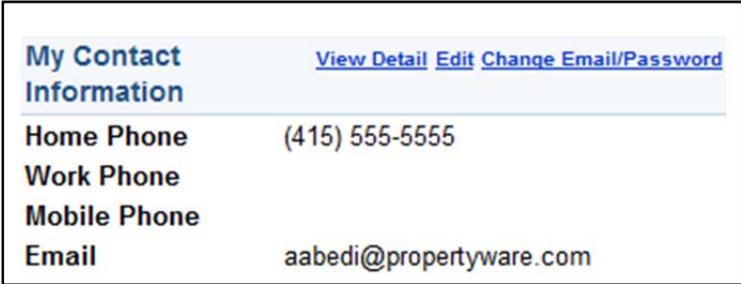
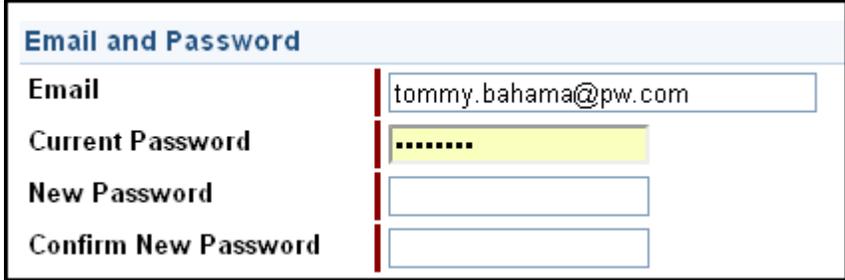
Editing the Contact Information

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

Step	Action/Screen
<p>From the My Account screen, click the Edit link.</p>	 <p>The screenshot shows a 'My Contact Information' header with a 'View Detail' link and an 'Edit' button. Below the header, the following information is displayed:</p> <ul style="list-style-type: none"> Home Phone: 555-1212 Work Phone: 555-1212 Mobile Phone: 555-1212 Email: tommy.bahama@pw.com
<p>Update the relevant fields.</p>	 <p>The screenshot shows the 'Home > Edit Contact' screen. It features a 'Save' button and a 'Cancel' button at the top. Below them is the 'Edit Contact Information' form with the following fields:</p> <ul style="list-style-type: none"> First Name: Tommy Last Name: Bahama Email: tommy.bahama@pw.com Company: (empty field) Address: 23 Presidio Lane Address 2: (empty field) City: San Francisco State/Province: CA Zip/Postal Code: 94089 Country: USA Home Phone: 555-1212 Work Phone: 555-1212 Mobile Phone: 555-1212 <p>At the bottom of the form, there are 'Save' and 'Cancel' buttons.</p> <p>Note: The name cannot be changed. The email address can be changed but not from this view.</p>
<p>Click the Save button.</p>	 <p>The screenshot shows a close-up of the 'Save' and 'Cancel' buttons. A mouse cursor is clicking on the 'Save' button.</p>

Changing the Email Address and Password

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

Step	Action/Screen
<p>From the My Account screen, click the Change Email/Password link.</p>	
<p>Update the email address and password.</p>	 <p>Note: The current password is automatically entered in its field.</p>
<p>Click the Save button.</p>	

Conversing with the Management Team

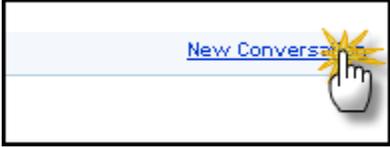
You or your management team can initiate conversations. All conversations are displayed at the bottom of the **My Accounts** screen.

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

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

Starting New Conversations

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

Step	Action/Screen
Click the New Conversation link.	
Complete all of the fields.	<div data-bbox="472 1209 1430 1654"> <p>Lease > New Conversation</p> <p>Edit Comment</p> <p style="text-align: right;">Save Cancel</p> <p>Lease <input type="text" value="23 Presidio Lane - Active"/></p> <p>Subject <input type="text"/></p> <p>Description <input type="text"/></p> <p style="text-align: right;">Save Cancel</p> </div> <p>The lease will automatically display. If the tenant has more than one lease, they can select the lease in question from the dropdown.</p>
Click the Save button.	

Continuing Existing Conversations

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

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

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

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

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

Conversation: Rent

Comments

Back New Comment

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

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

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

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

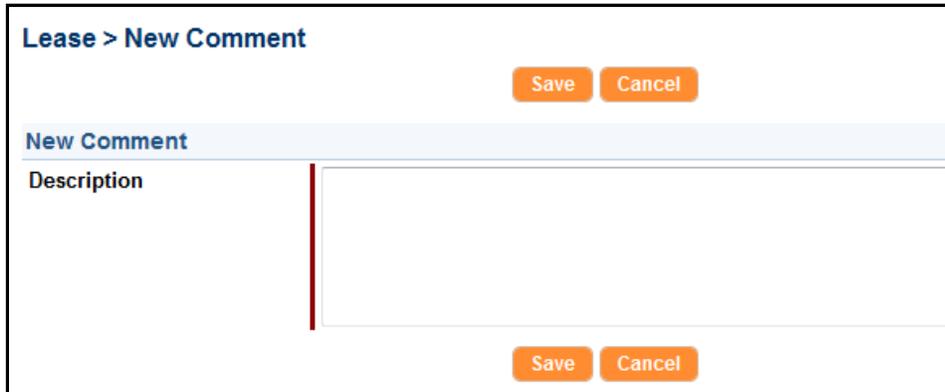
Back New Comment

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

Back New Comment



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

A screenshot of a web form titled "Lease > New Comment". The form has a light blue header bar with the title. Below the header, there are two orange buttons: "Save" and "Cancel". The main content area is divided into a section labeled "New Comment" with a light blue background. Underneath, there is a label "Description" on the left, followed by a large, empty text input field. At the bottom of the form, there are two more orange buttons: "Save" and "Cancel".

My Rentals

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

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

My Account	My Rentals	Maintenance	Documents	Renter's Insurance		
My Rentals						
Address	Unit	Last Payment Date	Deposit Held	Total Unpaid	Balance	Action
23 Presidio Lane	-	02/22/2010	\$1,500.00	\$750.00	\$750.00	<input type="text" value=""/>

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

My Rentals						
<div style="border: 1px solid black; padding: 5px; display: inline-block;"> Make Payment Payment Account Auto Payments </div>						
Address	Unit	Last Payment Date	Deposit Held	Total Unpaid	Balance	Action
40 Cervantes Blvd Unit 1	Unit 1	12/16/2009	\$2,000.00	\$6,225.00	\$6,225.00	--- Choose --- <input type="text" value=""/>

Setting up Auto Payments

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

Step	Action/Screen																
Click the Make Payment button.																	
Click the Schedule Auto Payment button.																	
Complete all required fields.	<p data-bbox="500 898 808 919">My Rentals > Auto Payments > New</p> <p data-bbox="500 928 711 949">Auto Payment Information</p> <table data-bbox="500 957 1182 1226"> <tr> <td>Rental</td> <td>40 Cervantes Blvd Unit 1 - Active</td> </tr> <tr> <td>Amount</td> <td>\$600.00</td> </tr> <tr> <td colspan="2">A convenience fee of \$3.00 will be added to your payment.</td> </tr> <tr> <td>Start Date</td> <td>3/1/2010</td> </tr> <tr> <td>End Date</td> <td>(Leave blank to continue until Lease termination)</td> </tr> <tr> <td>Frequency</td> <td>Monthly</td> </tr> <tr> <td>Pay Day</td> <td>1</td> </tr> <tr> <td>Description</td> <td></td> </tr> </table> <p data-bbox="500 1243 1312 1276">Please take into consideration that the settlement of your payment will take 3 to 4 business days. To avoid a non-sufficient funds fee, please be sure that your bank account has the sufficient funds to cover your payment.</p> <p data-bbox="850 1293 971 1314">Next Cancel</p> <p data-bbox="483 1394 1263 1423">Note: The convenience fee is displayed under the Amount field.</p>	Rental	40 Cervantes Blvd Unit 1 - Active	Amount	\$600.00	A convenience fee of \$3.00 will be added to your payment.		Start Date	3/1/2010	End Date	(Leave blank to continue until Lease termination)	Frequency	Monthly	Pay Day	1	Description	
Rental	40 Cervantes Blvd Unit 1 - Active																
Amount	\$600.00																
A convenience fee of \$3.00 will be added to your payment.																	
Start Date	3/1/2010																
End Date	(Leave blank to continue until Lease termination)																
Frequency	Monthly																
Pay Day	1																
Description																	
Confirm the total amount to be paid each month and click the Save button.	<p data-bbox="500 1528 808 1549">Please Confirm Your Auto Payment</p> <p data-bbox="500 1558 678 1579">Confirm Auto Payment</p> <table data-bbox="500 1587 922 1717"> <tr> <td>Rental</td> <td>40 Cervantes Blvd Unit 1 - Active</td> </tr> <tr> <td>Amount</td> <td>\$600.00</td> </tr> <tr> <td>Convenience Fee</td> <td>\$3.00</td> </tr> <tr> <td>Total Amount</td> <td>\$603.00</td> </tr> <tr> <td>Confirm Total Amount</td> <td>\$603.00</td> </tr> </table> <p data-bbox="500 1734 1312 1768">Please take into consideration that the settlement of your payment will take 3 to 4 business days. To avoid a non-sufficient funds fee, please be sure that your bank account has the sufficient funds to cover your payment.</p> <p data-bbox="802 1785 1013 1806">Previous Save Cancel</p>	Rental	40 Cervantes Blvd Unit 1 - Active	Amount	\$600.00	Convenience Fee	\$3.00	Total Amount	\$603.00	Confirm Total Amount	\$603.00						
Rental	40 Cervantes Blvd Unit 1 - Active																
Amount	\$600.00																
Convenience Fee	\$3.00																
Total Amount	\$603.00																
Confirm Total Amount	\$603.00																

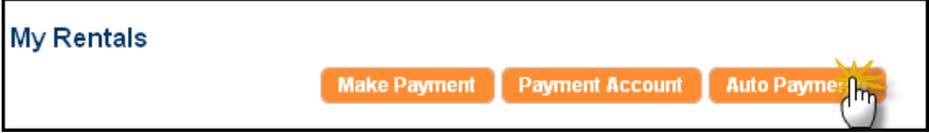
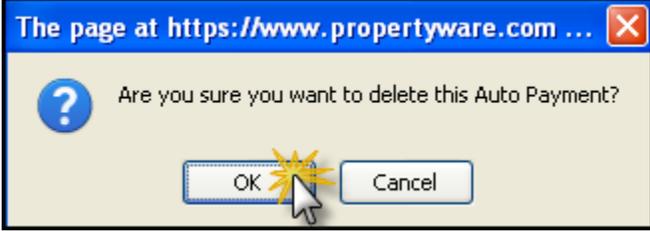
You are directed to the **My Rentals > Auto Payments** screen, confirming that the payment has been set for recurring.



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

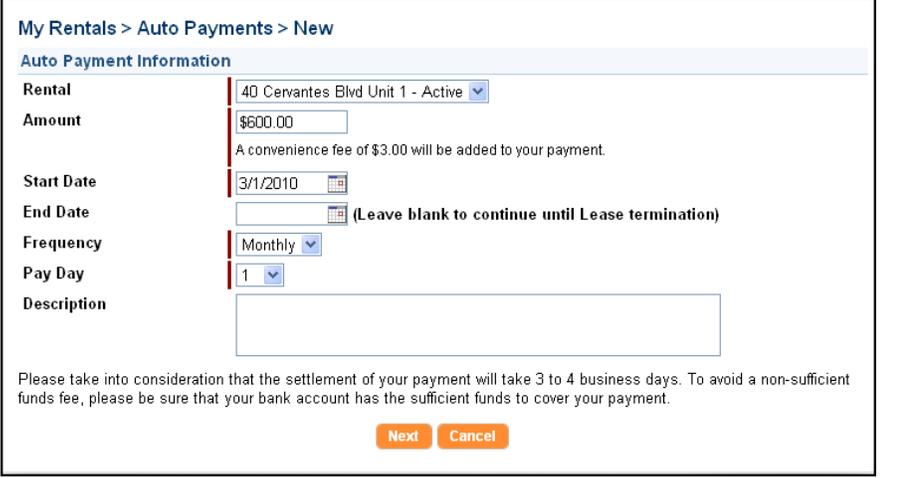
Deleting Auto Payments

You can delete your auto payments at any time.

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

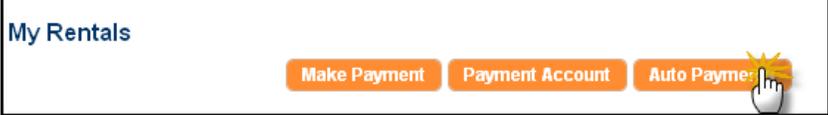
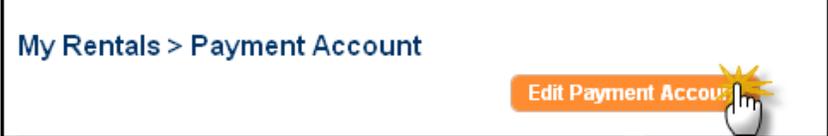
Editing Auto Payments

You can edit your auto payments at any time.

Step	Action/Screen														
<p>From the My Rentals or My Account screen, click the Auto Payments button.</p>	 <p>My Rentals</p> <p>Make Payment Payment Account Auto Payments</p>														
<p>Click Edit from the Action dropdown.</p>	 <p>My Rentals > Auto Payments</p> <p>Schedule Auto Payment</p> <p>Auto Payments</p> <table border="1"> <thead> <tr> <th>Amount</th> <th>Fee</th> <th>Frequency</th> <th>Start Date</th> <th>End Date</th> <th>Pay Day</th> <th>Action</th> </tr> </thead> <tbody> <tr> <td>\$600.00</td> <td>\$3.00</td> <td>Monthly</td> <td>05/01/2010</td> <td></td> <td>1</td> <td> -- Choose -- -- Choose -- View Detail Edit Delete </td> </tr> </tbody> </table> <p>Powered By Propertyware</p>	Amount	Fee	Frequency	Start Date	End Date	Pay Day	Action	\$600.00	\$3.00	Monthly	05/01/2010		1	-- Choose -- -- Choose -- View Detail Edit Delete
Amount	Fee	Frequency	Start Date	End Date	Pay Day	Action									
\$600.00	\$3.00	Monthly	05/01/2010		1	-- Choose -- -- Choose -- View Detail Edit Delete									
<p>Fill out the required information.</p>	 <p>My Rentals > Auto Payments > New</p> <p>Auto Payment Information</p> <p>Rental: 40 Cervantes Blvd Unit 1 - Active</p> <p>Amount: \$600.00 A convenience fee of \$3.00 will be added to your payment.</p> <p>Start Date: 3/1/2010</p> <p>End Date: (Leave blank to continue until Lease termination)</p> <p>Frequency: Monthly</p> <p>Pay Day: 1</p> <p>Description:</p> <p>Please take into consideration that the settlement of your payment will take 3 to 4 business days. To avoid a non-sufficient funds fee, please be sure that your bank account has the sufficient funds to cover your payment.</p> <p>Next Cancel</p>														
<p>Confirm the total amount to be paid each month and click the Save button.</p>	 <p>Please Confirm Your Auto Payment</p> <p>Confirm Auto Payment</p> <p>Rental: 40 Cervantes Blvd Unit 1 - Active</p> <p>Amount: \$600.00</p> <p>Convenience Fee: \$3.00</p> <p>Total Amount: \$603.00</p> <p>Confirm Total Amount: \$603.00</p> <p>Please take into consideration that the settlement of your payment will take 3 to 4 business days. To avoid a non-sufficient funds fee, please be sure that your bank account has the sufficient funds to cover your payment.</p> <p>Previous Save Cancel</p>														

Editing Payment Accounts

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

Step	Action/Screen
From the My Rentals screen, click the Payment Account button.	
Click the Edit Payment Account button.	
Select the radio button for the payment.	 <p>Note: The selected radio button drives the default payment account. All payments are drawn from that account moving forward.</p>
Edit the account details.	<div style="display: flex; justify-content: space-between;"> <div data-bbox="505 1148 878 1717" style="width: 48%;"> <p>E-Check</p> <p>Payment Method</p> <p><input checked="" type="radio"/> E-Check <input type="radio"/> Credit Card</p> <p>Please enter your bank account information exactly as it appears on your check. ACH payments submitted without accurate routing and account numbers will not be processed and subject to a non-sufficient funds fee.</p> <p>Bank Name Bank Of America</p> <p>Account Type Checking</p> <p>Routing Number 121000358</p> <p>Account Number 1234567</p> <p>⋆000087694⋆ ⋆2346789⋆ ⋆00⋆</p> <p>Routing Number Account Number Check Number</p> <p>Social Security # 123-45-6789</p> <p>OR</p> <p>Drivers License # </p> <p>Drivers License State/Province </p> </div> <div data-bbox="943 1148 1370 1520" style="width: 48%;"> <p>Credit Card</p> <p>Payment Method</p> <p><input type="radio"/> E-Check <input checked="" type="radio"/> Credit Card</p> <p>Card Number XXXXXXXXXXXXXXX2</p> <p>Card Verification 011</p> <p>Card Expiration 1 - January 2011</p> </div> </div>

Viewing Lease Details

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

My Rentals > 23 Presidio Lane 1 [Give Notice](#) [Print](#)

2 **Rental Detail**

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

3 **Tenant Ledger**

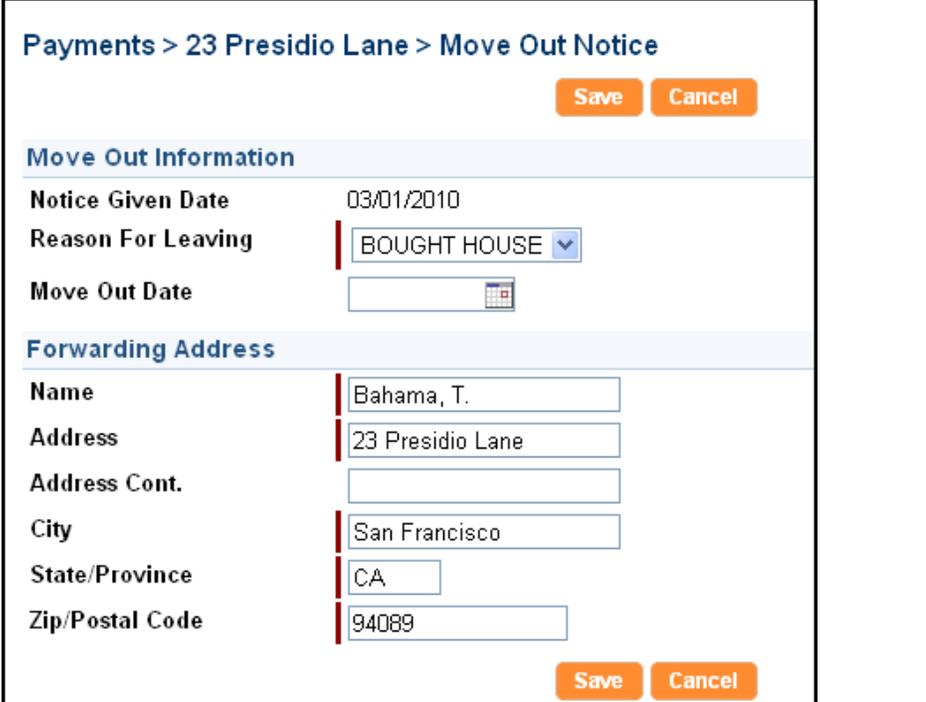
Total Unpaid	Deposit Held	Prepayments
\$750.00	\$1,500.00	\$0.00

Type	Date	Ref #	Comments	Amount	Balance
Rent	03/01/2010			\$2,000.00	\$2,000.00
Payment	02/22/2010	002		(\$35.00)	(\$0.00)
Late Fee (Manual)	02/22/2010	01	This a manual late fee since the earlier one was accidently credited	\$35.00	\$35.00
Payment	02/19/2010	948		(\$1,250.00)	(\$0.00)
Payment	02/16/2010	23		(\$2,428.57)	(\$0.00)
Security Deposit	02/16/2010			\$1,500.00	\$2,428.57
Rent	02/16/2010		Prorated for 13 days	\$928.57	\$928.57

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

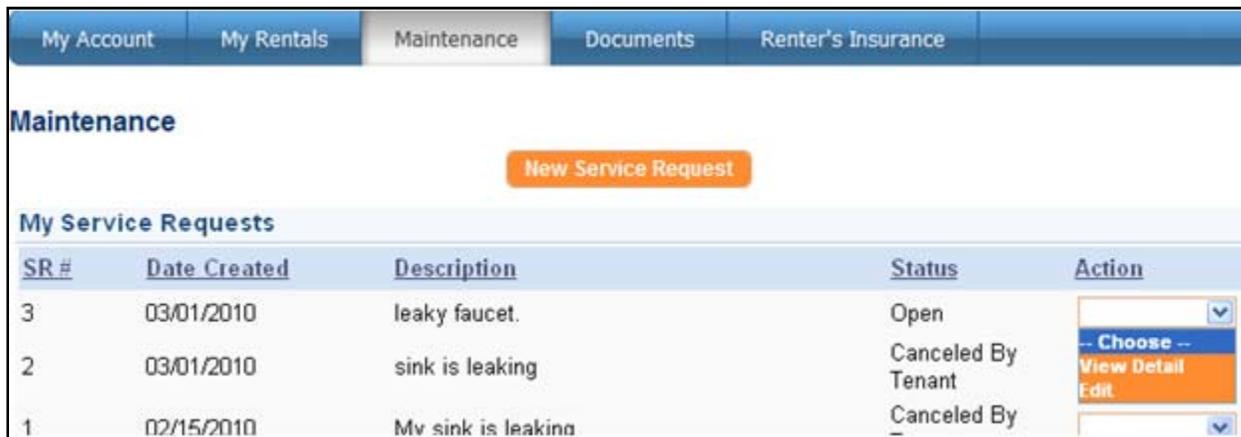
Giving Notice

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

Step	Action/Screen
<p>From the My Rentals screen, click the Give Notice button.</p>	 <p>Rental Detail Address 23 Presidio Lane in San Francisco, CA</p>
<p>Complete all relevant fields.</p>	 <p>Payments > 23 Presidio Lane > Move Out Notice Save Cancel</p> <p>Move Out Information</p> <p>Notice Given Date 03/01/2010 Reason For Leaving BOUGHT HOUSE Move Out Date <input type="text"/></p> <p>Forwarding Address</p> <p>Name Bahama, T. Address 23 Presidio Lane Address Cont. <input type="text"/> City San Francisco State/Province CA Zip/Postal Code 94089 Save Cancel</p>
<p>Click the Save button.</p>	 <p>Save Cancel</p>

Maintenance

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

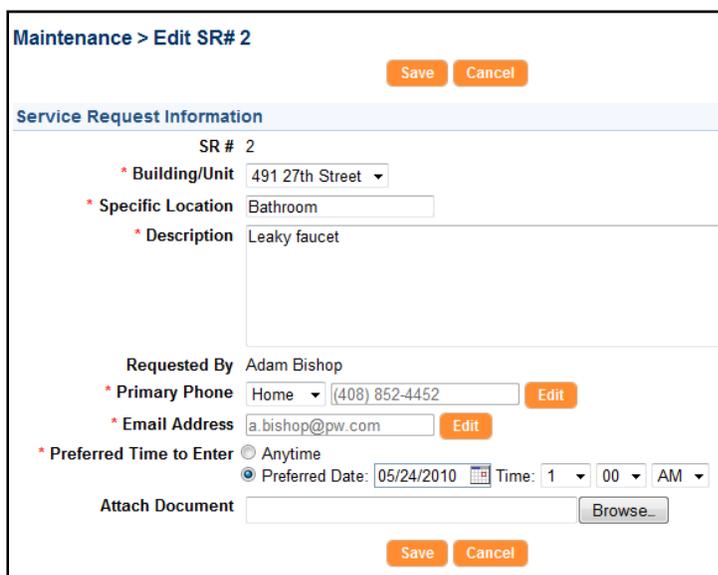


The screenshot shows the 'Maintenance' tab selected in a navigation bar. Below the navigation bar is a 'New Service Request' button. A section titled 'My Service Requests' contains a table with the following data:

SR #	Date Created	Description	Status	Action
3	03/01/2010	leaky faucet.	Open	Choose -- View Detail Edit
2	03/01/2010	sink is leaking	Canceled By Tenant	
1	02/15/2010	My sink is leaking	Canceled By	

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

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



The screenshot shows the 'Edit SR# 2' form with the following fields and values:

- SR #**: 2
- Building/Unit**: 491 27th Street
- Specific Location**: Bathroom
- Description**: Leaky faucet
- Requested By**: Adam Bishop
- Primary Phone**: Home (408) 852-4452
- Email Address**: a.bishop@pw.com
- Preferred Time to Enter**: Preferred Date: 05/24/2010, Time: 1:00 AM
- Attach Document**: Browse...

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

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

Documents

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

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

Building Documents

Documents

There are no Building documents available

Lease Documents

Documents

There are no Lease documents available

Other Documents

Documents

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



Note

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

Renter's Insurance

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

Conversations [New Conversation](#)

No Conversations

"My neighbor's candle started a fire. I lost everything."

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

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

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

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

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

You are about to leave your Property Management Company's web site (which is licensed from Propertyware, Inc.) and will be directed to another company's secured site. The site will include information about insurance from a licensed insurance agency. Such information is not provided by your Property Management Company or Propertyware, nor should it be construed as an endorsement or a solicitation to sell insurance by your Property Management Company or Propertyware. Your Property Management Company and Propertyware assume no liability or responsibility arising from the use of any product, information, idea or instruction contained on the site, and also do not guarantee or make any representations regarding the accuracy of any statements made on other web sites.

By continuing, you are agreeing to allow certain information about you and your lease to be provided to eRenterPlan to assist the site to help prepare a no cost, no obligation quote for an insurance policy for you.

To Continue, click "I Agree", or to go back, click "Go Back."

[I Agree](#) [Go Back](#)

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

QUOTE
PRODUCTS
FAQS
ABOUT US
CONTACT US
LOG IN



Call Us Today
1-888-205-8118

Mon. - Fri. 6 a.m. - 6 p.m. PST
Sat. 7 a.m. - 2 p.m. PST
Para Espanol, oprime el numero 8

[Click here](#) to leave a message.

FREE QUOTE and
Proof of Coverage in
minutes!

Enter your zip
code: ➔

? [Contact customer service](#)

\$ [Policyholder Log In](#)

ActiveQuote

Based on the Zip Code: **94945 - Novato, CA** the following Renter's Insurance Policies are available to you on a Pre-Approved basis. Please select one of the coverage options from the box below to receive a detailed quote.

Please Note - eRenterPlan Policy Premiums may change based on the Policy Start Date selected.

Compare Policies
Enroll On-Line Now

Renters Insurance Policy Selection

Please select one of the following insurance policy options to receive your quote.

\$40K Personal Prop. / \$100K Personal Liab. (Pref)

\$30K Personal Prop. / \$100K Personal Liab. (Pref)

\$20K Personal Prop. / \$100K Personal Liab. (Pref)

\$10K Personal Prop. / \$100K Personal Liab. (Pref)

\$5K Personal Prop. / \$100K Personal Liab. (Pref)

\$30K Personal Prop. / \$100K Personal Liab. (Pref)

Coverage	Limits
Personal Property and Additional Living Expenses	\$30,000
Personal Liability Coverage	\$100,000
Medical Payment to Others	\$1,000

Policy Notes: Unless otherwise provided, this policy contains a \$1,000 deductible for all Wind and Hail losses.

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



Note

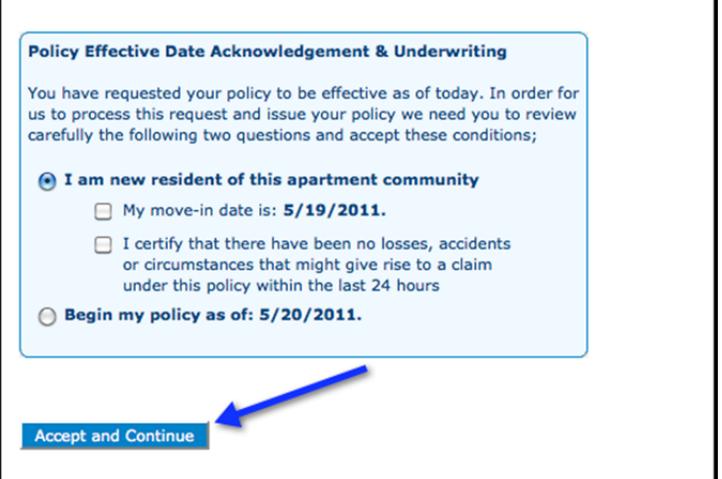
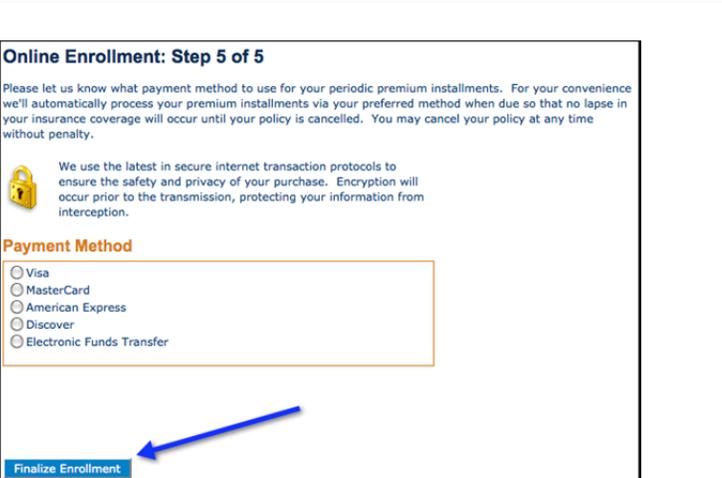
Referral fees for leads are earned only when you complete the purchase online. If you elect to call the toll-free number to purchase insurance, eRenterPlan cannot link the lead to your property.

Propertyware Tenant Portal Guide

Revised 6/24/11

Enrolling in Renter's Insurance

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

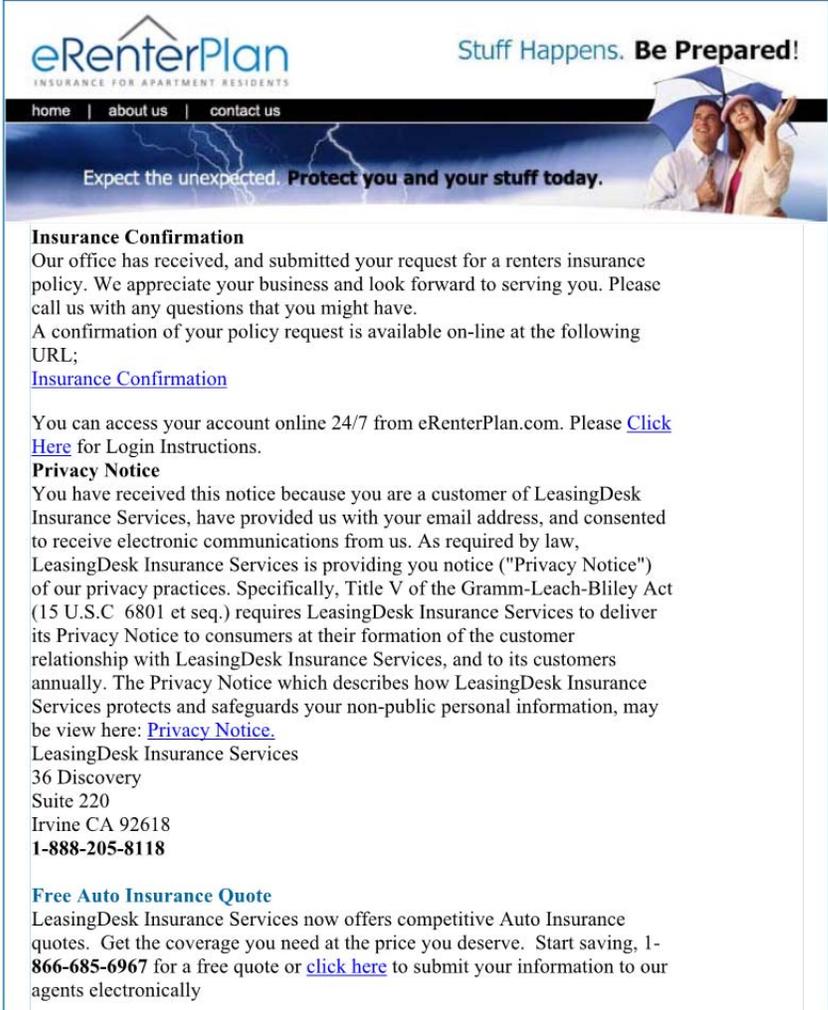
<p>Confirm and accept the Privacy Policy and Effective Date of Acknowledgement. Effective date can be the date of your move in or you can start the policy on the next business day. If you choose your move-in-date as the effective date, you also have to confirm that you have not suffered losses prior to that date. Click Accept and Continue button to proceed.</p>	 <p>Policy Effective Date Acknowledgement & Underwriting</p> <p>You have requested your policy to be effective as of today. In order for us to process this request and issue your policy we need you to review carefully the following two questions and accept these conditions;</p> <ul style="list-style-type: none"> <input checked="" type="radio"/> I am new resident of this apartment community <ul style="list-style-type: none"> <input type="checkbox"/> My move-in date is: 5/19/2011. <input type="checkbox"/> I certify that there have been no losses, accidents or circumstances that might give rise to a claim under this policy within the last 24 hours <input type="radio"/> Begin my policy as of: 5/20/2011. <p>Accept and Continue</p>
<p>Select the payment type and click the Finalize Enrollment button to complete the process.</p>	 <p>Online Enrollment: Step 5 of 5</p> <p>Please let us know what payment method to use for your periodic premium installments. For your convenience we'll automatically process your premium installments via your preferred method when due so that no lapse in your insurance coverage will occur until your policy is cancelled. You may cancel your policy at any time without penalty.</p> <p> We use the latest in secure internet transaction protocols to ensure the safety and privacy of your purchase. Encryption will occur prior to the transmission, protecting your information from interception.</p> <p>Payment Method</p> <ul style="list-style-type: none"> <input type="radio"/> Visa <input type="radio"/> MasterCard <input type="radio"/> American Express <input type="radio"/> Discover <input type="radio"/> Electronic Funds Transfer <p>Finalize Enrollment</p>
<p> Note</p> <p>Questions and inquiries about the policy and making claims should be directed to eRenterPlan Insurance. You receive a welcome email with contact information and a link for managing your policy online and customer service.</p>	

Viewing Enrollment Confirmation Email

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

Joe Resident

Subject: eRenterPlan Insurance Confirmation
Attachments: 2011051911554660401042.pdf



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

You can access your account online 24/7 from eRenterPlan.com. Please [Click Here](#) for Login Instructions.

Privacy Notice
You have received this notice because you are a customer of LeasingDesk Insurance Services, have provided us with your email address, and consented to receive electronic communications from us. As required by law, LeasingDesk Insurance Services is providing you notice ("Privacy Notice") of our privacy practices. Specifically, Title V of the Gramm-Leach-Bliley Act (15 U.S.C 6801 et seq.) requires LeasingDesk Insurance Services to deliver its Privacy Notice to consumers at their formation of the customer relationship with LeasingDesk Insurance Services, and to its customers annually. The Privacy Notice which describes how LeasingDesk Insurance Services protects and safeguards your non-public personal information, may be view here: [Privacy Notice](#).

LeasingDesk Insurance Services
36 Discovery
Suite 220
Irvine CA 92618
1-888-205-8118

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

Viewing Policy Details on the Portal

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

My Account	My Rental	Maintenance	Documents	Renter's Insurance			
Insurance							
My Policies							
Policy Holder	Policy Number	Provider	Status	Effective Date	Next Renewal	Last Status Update	Policy Docs
Ann Allyn	0030460020	eRenterPlan (LeasingDesk)	Active	05/16/2011	05/16/2012		

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

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

		Mailing Address: P.O. Box 17478, Irvine, CA 92623-7478 Customer Service: 1-888-205-8118 M-F 6:30am PST to 5:30pm PST	Confirmation Notice Date: 5/13/2011																												
Name and Address of Insured: ANN ALLYN 1390 Santa Alicia Ave Chula Vista, CA 91913-1850		Additional Insured(s): Any new resident must be added to the policy in order to be eligible for coverage. Residents can be added or removed by logging onto http://www.eRenterPlan.com																													
Mailing Address:		Policyholder Contact Information: Telephone #: Email Address: a.allyn787@gmail.com																													
Policy Summary: <table border="1"> <tr> <td>Policy Number:</td> <td>0030460020</td> </tr> <tr> <td>Effective Date:</td> <td>05/16/2011 12:01 AM CST</td> </tr> <tr> <td>Coverage</td> <td>Limit</td> </tr> <tr> <td>Personal Property Coverage</td> <td>\$30,000</td> </tr> <tr> <td>Additional Living Expenses</td> <td></td> </tr> <tr> <td>Personal Liability Coverage</td> <td>\$100,000</td> </tr> <tr> <td>Medical Payments to Others</td> <td>\$1,000</td> </tr> <tr> <td>Deductible:</td> <td>\$250</td> </tr> </table>		Policy Number:	0030460020	Effective Date:	05/16/2011 12:01 AM CST	Coverage	Limit	Personal Property Coverage	\$30,000	Additional Living Expenses		Personal Liability Coverage	\$100,000	Medical Payments to Others	\$1,000	Deductible:	\$250	Insurance Company: <table border="1"> <tr> <td>Insurance Company:</td> <td>American Modern Home Insurance Company</td> </tr> <tr> <td></td> <td>Amelia, OH</td> </tr> <tr> <td>Claims (Toll Free):</td> <td>1-800-375-2075</td> </tr> <tr> <td>NAIC#:</td> <td></td> </tr> <tr> <td>Agent:</td> <td>Leasingpost Insurance Services</td> </tr> <tr> <td>Lic#:</td> <td>0D12126</td> </tr> </table>		Insurance Company:	American Modern Home Insurance Company		Amelia, OH	Claims (Toll Free):	1-800-375-2075	NAIC#:		Agent:	Leasingpost Insurance Services	Lic#:	0D12126
Policy Number:	0030460020																														
Effective Date:	05/16/2011 12:01 AM CST																														
Coverage	Limit																														
Personal Property Coverage	\$30,000																														
Additional Living Expenses																															
Personal Liability Coverage	\$100,000																														
Medical Payments to Others	\$1,000																														
Deductible:	\$250																														
Insurance Company:	American Modern Home Insurance Company																														
	Amelia, OH																														
Claims (Toll Free):	1-800-375-2075																														
NAIC#:																															
Agent:	Leasingpost Insurance Services																														
Lic#:	0D12126																														
Optional Coverages: -		Premium Installments: Your credit/debit card will be charged Monthly for your period premium installments. Estimated billing dates are as follows: the 29th of each month.																													
Important Information Unless otherwise provided, this policy contains a \$1,000 deductible for all Wind and Hail losses.																															
Insuring Agreement: Your complete policy will be mailed to you via U.S. Mail within 15 days. The policy is your contract for insurance, not the Insurance Election Form or this Confirmation of Insurance. Please review all information closely for accuracy when received. The information given here is only a summary of coverage to be provided to you by this policy.																															
Policy Cancellation: Your policy will NOT automatically terminate when you move-out. You must inform us of your cancellation in writing to avoid any further premium being billed to you or deducted from your account. You may also cancel your policy on-line at http://www.eRenterPlan.com .																															
Notice of Cancellation: Your leasing office or apartment community manager may be notified of any notice of cancellation or non-renewal of your policy.																															
Premium Installment Charges: If you have chosen to have your periodic premium installment payments debited from your bank account or credit card, please note that these periodic installments will be charged to your account roughly 7 to 14 days prior to your installment due date. This is for your protection and allows us sufficient time to notify you in writing in the event your account is closed or your credit card is declined by your issuing bank.																															
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