# Tenant Portal Guide

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Tenant Portal

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

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

Logging into the Tenant Portal

You need an email address to access your personalized portal. Your email address is your username for logging into your account. Your property manager sends an email with login instructions.
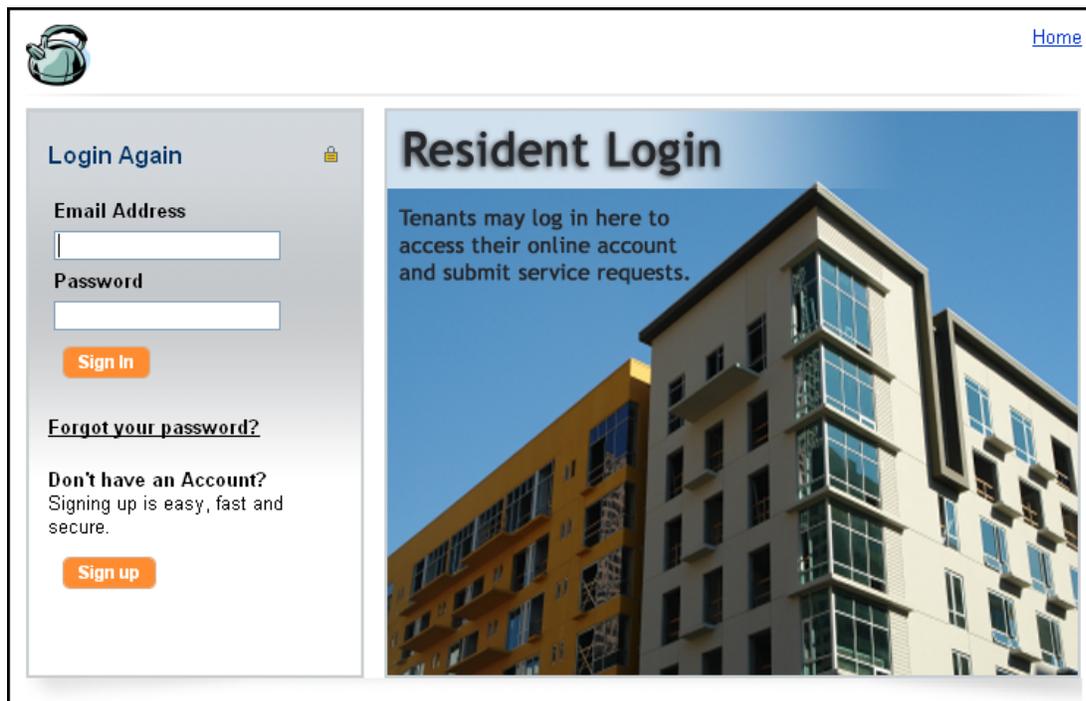
If you forget your password, use the **Forgot your password?** link to request a new password. You need to provide your first and last names and email. Enter the same email address that your property manager has on file.

Signing up for Tenant Account

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

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.

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

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

Tenant Portal Navigation Tabs

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

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.
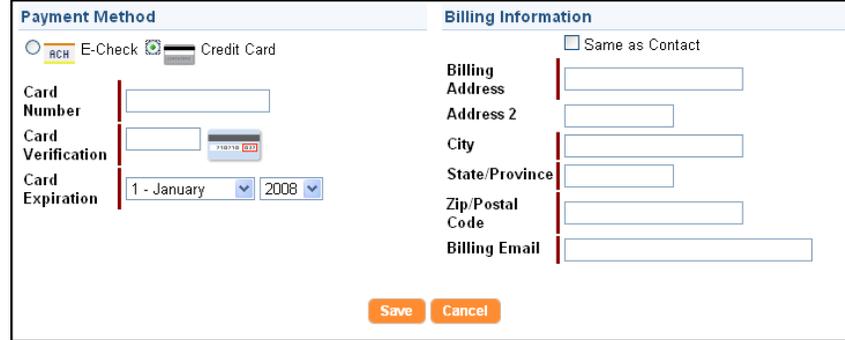
Making a One-Time Payment

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

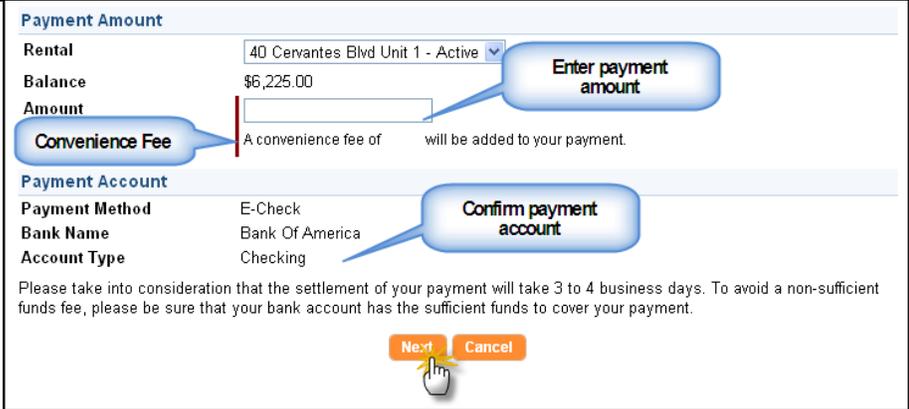|	
From the **My Account** screen, click the **Setup Payment Account** button to enter your E-Check or Credit Card information.	**Setup Payment Account**
Select your payment method.	**Payment Method** ⦿ ᴀᴄʜ E-Check ⦾ Credit Card **Note:** You can store both credit card and E-Check information. The selected radio button determines the payment method that is used as the default method.
If you select the **E-Check** radio button, you can enter either your driver's license or Social Security number for verification purposes.	**Payment Method** ⦿ ᴀᴄʜ E-Check ⦾ Credit Card Please enter your bank account information exactly as it appears on your check. ACH payments submitted without accurate routing and account numbers will be not be processed and subject to a non-sufficient funds fee. Bank Name Account Type [Checking ▾] Routing Number Account Number ⑆000067694⑆ ⑈123467891⑈ 1001 Routing Number Account Number Check Number Social Security # OR Drivers License # Drivers License State/Province **Billing Information** ☐ Same as Contact Billing Address Address 2 City State/Province Zip/Postal Code Billing Email **Note:** The system verifies that the routing number is an active routing number. Always, double-check the account number to make sure you have entered the correct information. Failure to enter the correct information can result in a returned check.

If you select the **Credit Card** payment method, you need to complete all of the fields.	**Payment Method** ◯ 🔲 E-Check ◉ 🔲 Credit Card Card Number Card Verification Card Expiration 1 - January 2008 **Billing Information** ☐ Same as Contact Billing Address Address 2 City State/Province Zip/Postal Code Billing Email **Save** **Cancel**
Click the **Save** button.	**Save** **Cancel**

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

Step	Action/Screen
Choose the **Make Payment** option from the dropdown **Action** menu or click the **Make Payment** button from the **My Account** screen.	**Summary** Address Unit Last Payment Date Deposit Held Total Unpaid Balance Action 43555 Grimmer blvd - $6,225.00 $6,225.00 $6,225.00 — Choose — — Choose — View Detail Make Payment
Enter the payment amount and click the **Next** button.	**Payment Amount** Rental 40 Cervantes Blvd Unit 1 - Active Balance $6,225.00 Amount Enter payment amount **Convenience Fee** A convenience fee of will be added to your payment. **Payment Account** Payment Method E-Check Bank Name Bank Of America Confirm payment account Account Type Checking Please take into consideration that the settlement of your payment will take 3 to 4 business days. To avoid a non-sufficient funds fee, please be sure that your bank account has the sufficient funds to cover your payment. **Next** **Cancel** **Note:** Enter the conveneince fee associated with ePayment. The transaction may take 1-4 business days depending on the transaction type.

Confirm the payment amount and click the **Confirm** button to process the payment.	Please Confirm Your Payment
	Payment Confirmation
	Rental 40 Cervantes Blvd Unit 1 - Active
	Amount $6,225.00
	Convenience Fee $3.00 **Confirm Payment Amount**
	Total Amount $6,228.00
	Confirm Payment Amount [ ]
	Payment Account
	Payment Method E-Check
	Bank Name Bank Of America
	Account Number XXX4567
	Please take into consideration that the settlement of your payment will take 3 to 4 business days. To avoid a non-sufficient funds fee, please be sure that your bank account has the sufficient funds to cover your payment.
	⚠ **Click Confirm Only Once!**
	[Previous] [Confirm]
	Note: To change the payment amount, click the **Previous** button. To prevent duplicate billing, click the **Confirm** button only once.

Setting up Auto Payments

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

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

Step	Action/Screen
Complete all required fields.	 **Note:** The convenience fee is displayed under the **Amount** field.
Confirm the total amount to be paid each month and click the **Save** button.	

Creating a New Service Request

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

Step	Action/Screen
From the **My Account** or **Maintenance** screen, click the **New Service Request** button.	

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

Important

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

Reviewing, Cancelling, and Editing Existing Service Requests

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

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

Viewing the Contact Information

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

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

The following information is displayed:
- First name
- Last name
- Email
- Company
- Address
- Home Phone
- Work Phone
- Mobile Phone

Editing the Contact Information

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

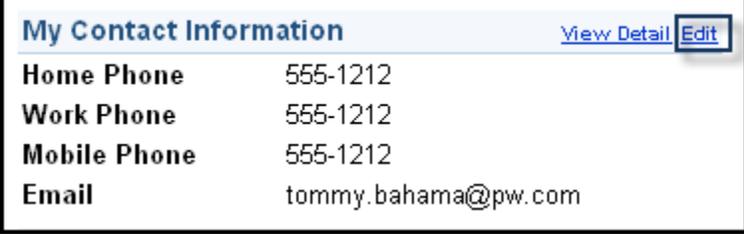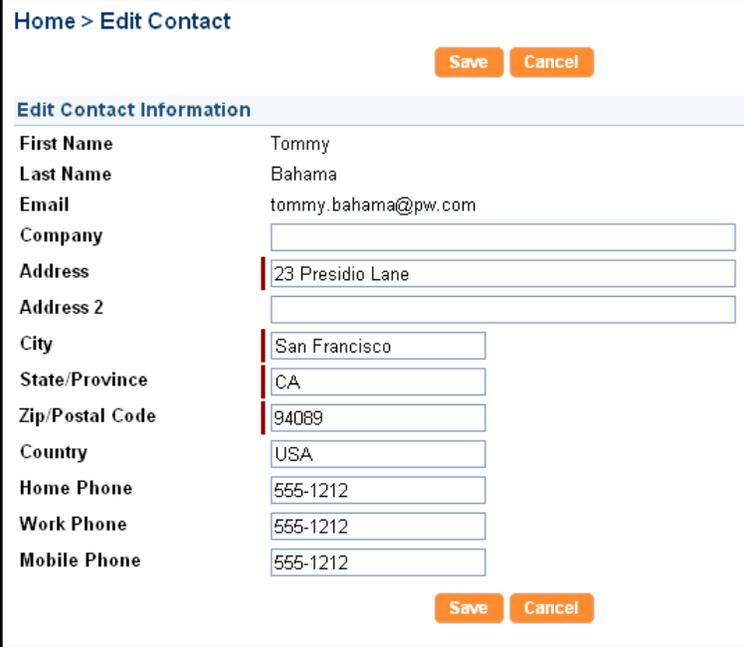| Step	Action/Screen
From the **My Account** screen, click the **Edit** link.	**My Contact Information** View Detail Edit Home Phone 555-1212 Work Phone 555-1212 Mobile Phone 555-1212 Email tommy.bahama@pw.com
Update the relevant fields.	**Home > Edit Contact** Save Cancel **Edit Contact Information**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

Changing the Email Address and Password

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

Step	Action/Screen
From the **My Account** screen, click the **Change Email/Password** link.	
Update the email address and password.	 **Note:** The current password is automatically entered in its field.
Click the **Save** button.	
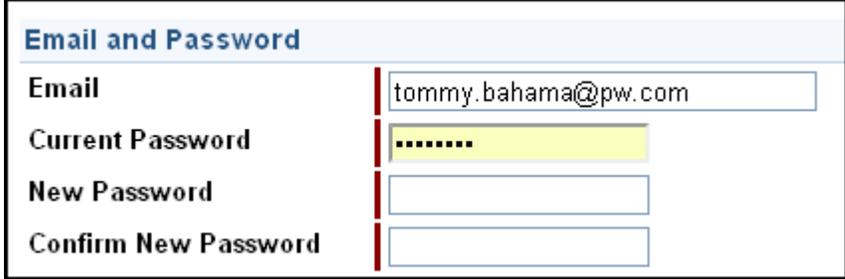
Conversing with the Management Team
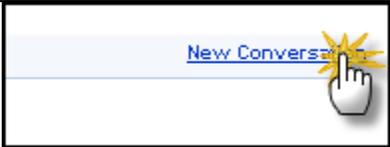
You or your management team can initiate conversations.   All conversations are displayed at the bottom of the **My Accounts** screen.

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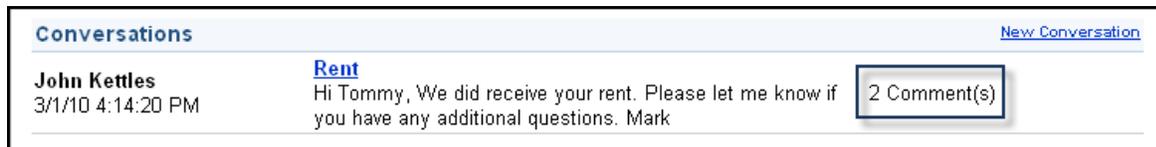
Starting New Conversations

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

Step	Action/Screen
Click the **New Conversation** link.	
Complete all of the fields.	 The lease will automatically display. If the tenant has more than one lease, they can select the lease in question from the dropdown.
Click the **Save** button.	

Continuing Existing Conversations

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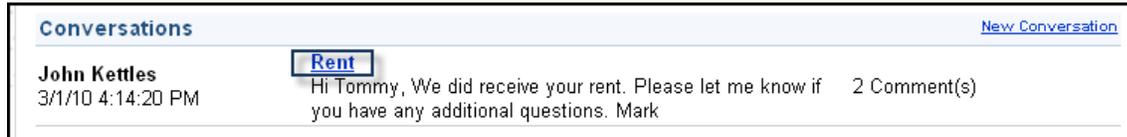

Click the [Subject] link to launch the list of comments for review.

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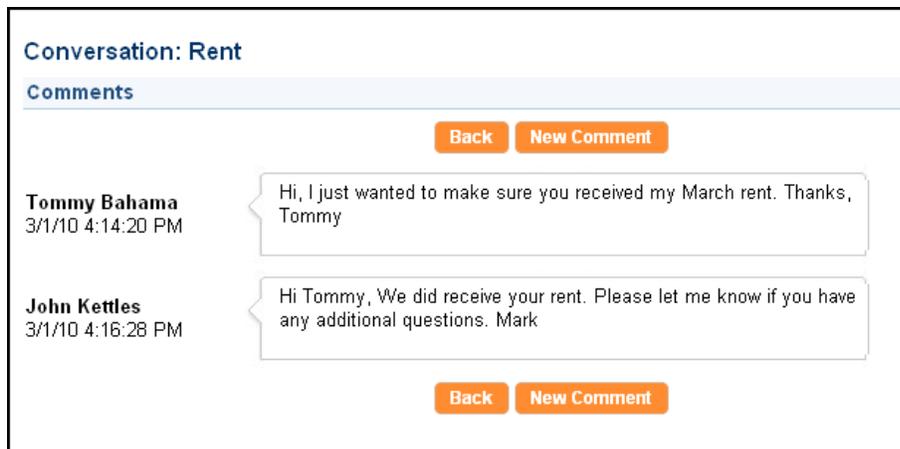
Click the **New Comment** button to reply.

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

My Rentals

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

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

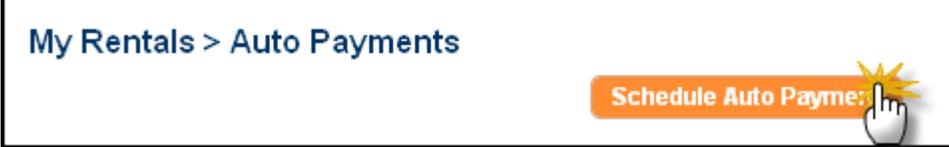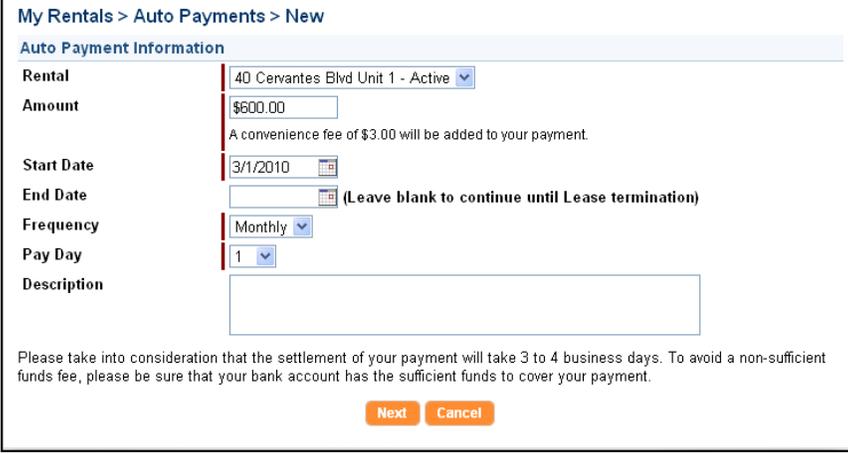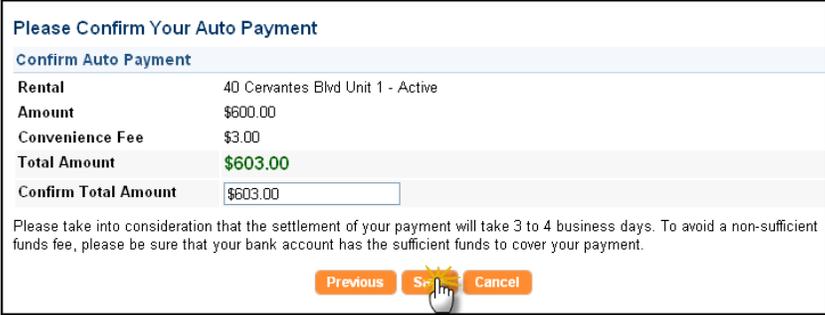If the management team has enabled electronic payments, you can also manage electronic payments from the **My Rentals** screen.

Setting up Auto Payments

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

Step	Action/Screen
Click the **Make Payment** button.	**Welcome Mrs. Allison West** — Make Payment New Service Request Auto Payment
Click the **Schedule Auto Payment** button.	**My Rentals > Auto Payments** — Schedule Auto Payment
Complete all required fields.	My Rentals > Auto Payments > New **Auto Payment Information** Rental: 40 Cervantes Blvd Unit 1 - Active Amount: $600.00 A convenience fee of $3.00 will be added to your payment. Start Date: 3/1/2010 End Date: (Leave blank to continue until Lease termination) Frequency: Monthly Pay Day: 1 Description: Please take into consideration that the settlement of your payment will take 3 to 4 business days. To avoid a non-sufficient funds fee, please be sure that your bank account has the sufficient funds to cover your payment. Next Cancel **Note:** The convenience fee is displayed under the **Amount** field.
Confirm the total amount to be paid each month and click the **Save** button.	**Please Confirm Your Auto Payment** **Confirm Auto Payment** Rental: 40 Cervantes Blvd Unit 1 - Active Amount: $600.00 Convenience Fee: $3.00 Total Amount: $603.00 Confirm Total Amount: $603.00 Please take into consideration that the settlement of your payment will take 3 to 4 business days. To avoid a non-sufficient funds fee, please be sure that your bank account has the sufficient funds to cover your payment. Previous Save Cancel

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

Deleting Auto Payments

You can delete your auto payments at any time.

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

Editing Auto Payments

You can edit your auto payments at any time.
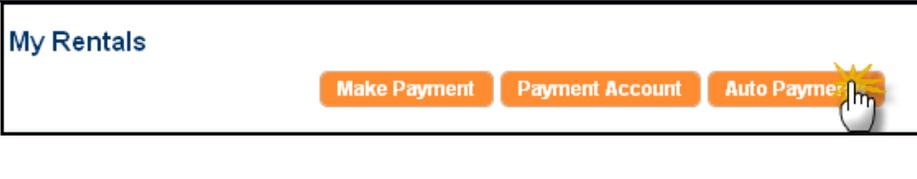
Step	Action/Screen
From the **My Rentals** or **My Account** screen, click the **Auto Payments** button.	
Click **Edit** from the **Action** dropdown.	
Fill out the required information.	
Confirm the total amount to be paid each month and click the **Save** button.	
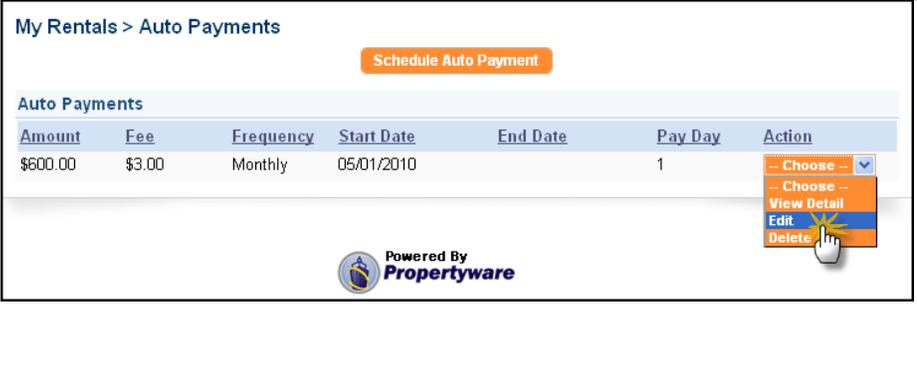
![Richey Property Management, LLC logo]
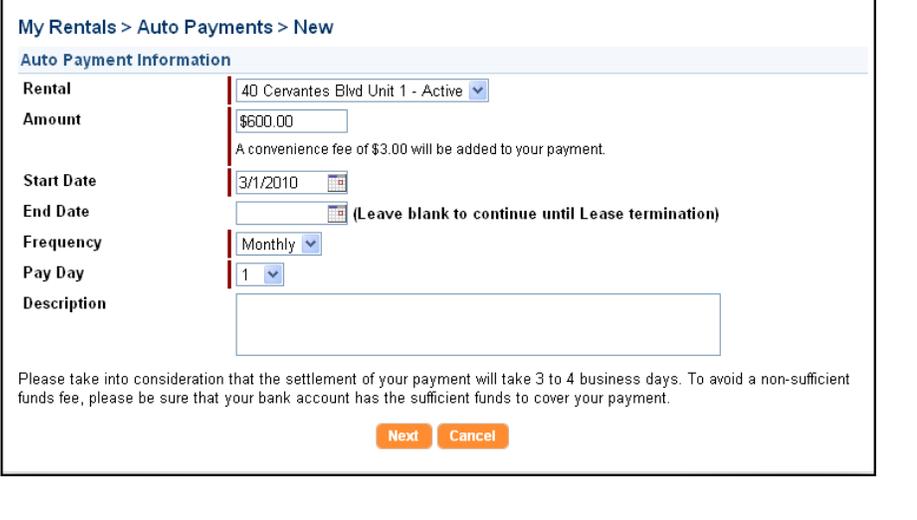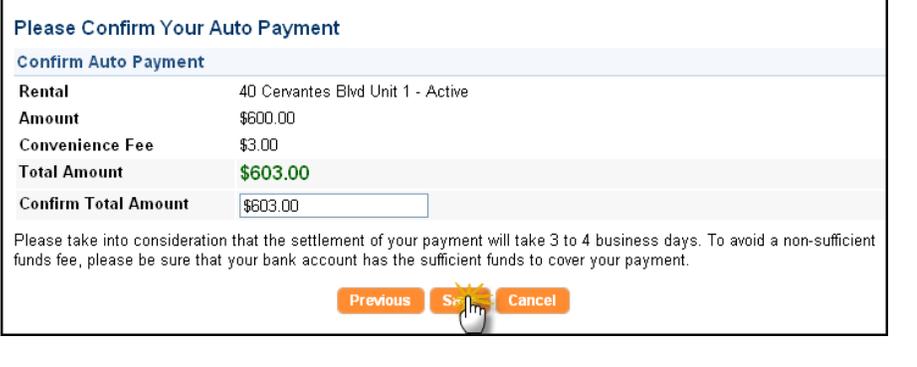
Editing Payment Accounts

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

Step	Action/Screen
From the **My Rentals** screen**,** click the **Payment Account** button.	**My Rentals** Make Payment Payment Account Auto Payment
Click the **Edit Payment Account** button.	**My Rentals > Payment Account** Edit Payment Account
Select the radio button for the payment.	**Payment Method** ⊙ ACH E-Check ◯ Credit Card **Note:** The selected radio button drives the default payment account. All payments are drawn from that account moving forward.
Edit the account details.	**E-Check** **Payment Method** ⊙ ACH E-Check ◯ Credit Card Please enter your bank account information exactly as it appears on your check. ACH payments submitted without accurate routing and account numbers will be not be processed and subject to a non-sufficient funds fee. Bank Name: Bank Of America Account Type: Checking Routing Number: 121000358 Account Number: 1234567 Routing Number Account Number Check Number Social Security #: 123-45-6789 OR Drivers License #: Drivers License State/Province: **Credit Card** **Payment Method** ◯ ACH E-Check ⊙ Credit Card Card Number: XXXXXXXXXXXXXXX2 Card Verification: 011 Card Expiration: 1 - January 2011

Viewing Lease Details

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

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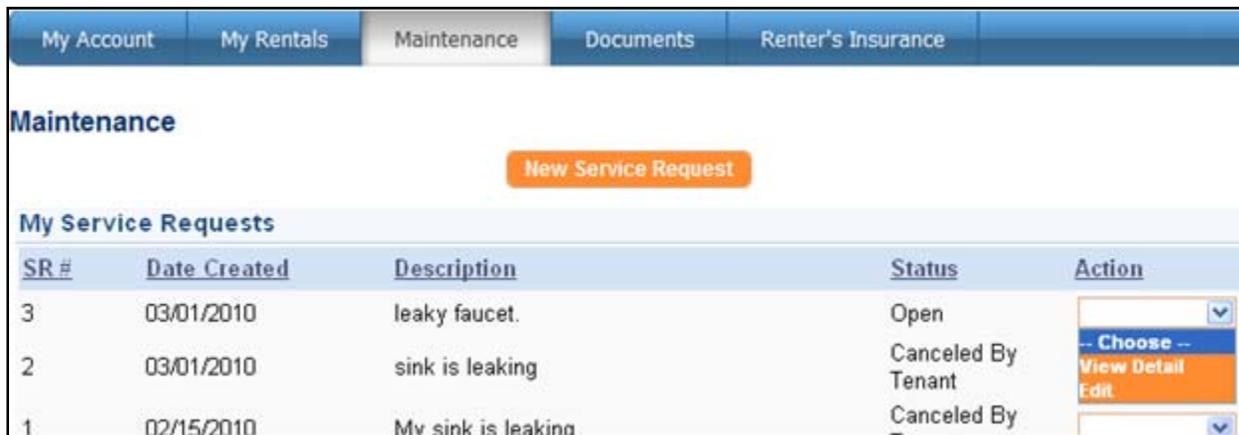
Giving Notice

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

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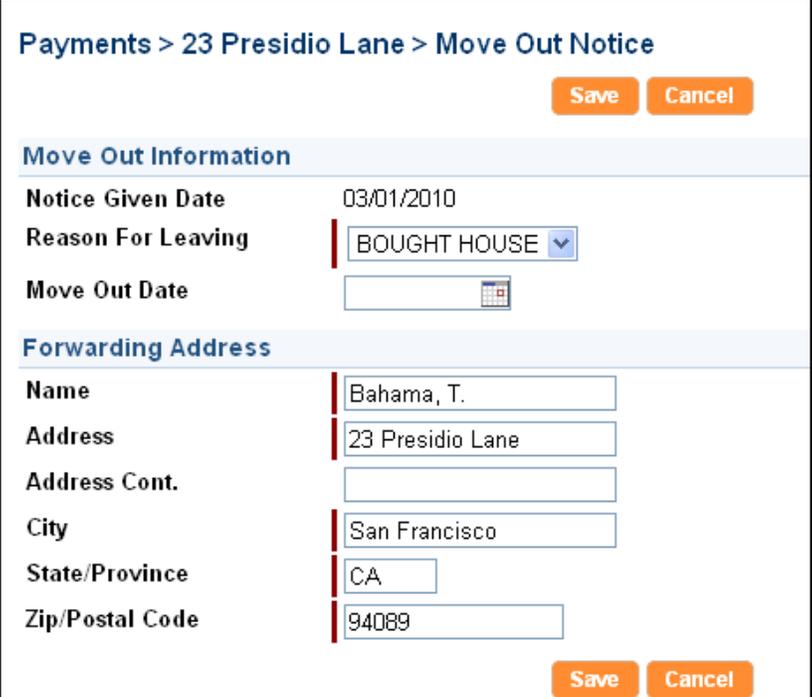
Maintenance

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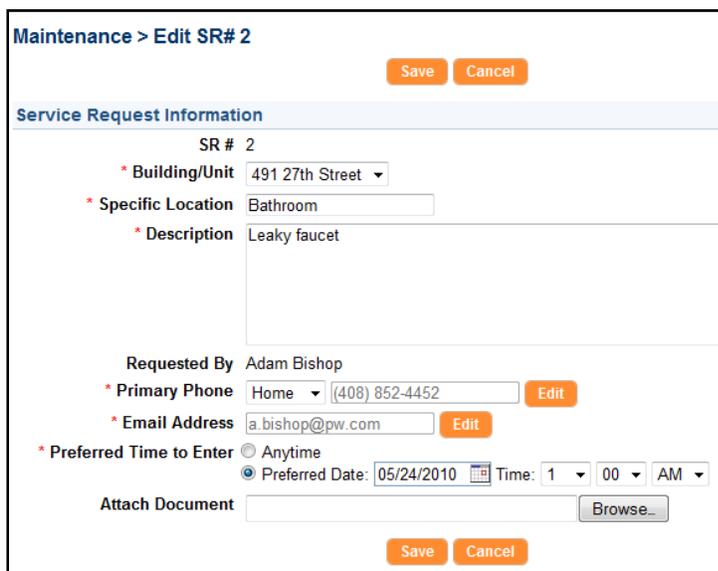

The **Status** field displays open, closed, or cancelled requests. If you need more details, select **View Details** from the **Action** dropdown. The **Edit** button is available in the dropdown for **Open** requests.

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

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

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

Documents

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

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

	Note

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