REALPAGE
Outperform

Propertyware New View Tenant Portal uGuide

July 2019

IMPORTANT NOTICE:

YOUR USE OF THESE MATERIALS SHALL BE DEEMED TO CONSTITUTE YOUR AGREEMENT THAT SUCH USE SHALL BE GOVERNED BY THE PROVISIONS OF YOUR AGREEMENT WITH REALPAGE, INC. OR ITS SUBSIDIARY (THE "AGREEMENT").

Notification

All documentation, source programs, object programs, procedures, and any other material supplied in connection therewith ("Materials") remain the exclusive property of RealPage, Inc., an affiliate of RealPage, Inc., or, in certain cases, its licensees. This document and the Materials are confidential and proprietary information of RealPage, Inc., its affiliates, or, in certain cases, its licensees. The Materials may not be copied, distributed, or otherwise disclosed, and may not be used in any way unless expressly authorized by RealPage. Any copying, distribution, or use of such Materials not specifically authorized by the Agreement shall be deemed a violation of the Agreement. Such a violation will terminate the licensee's right to use such Material. This notification constitutes part of the documentation and accordingly may not be removed therefrom.

© 2019 RealPage, Inc. All rights reserved.
Printed in the United States of America
All other brands and product names are trademarks or
registered trademarks of their respective owners.

Contents

Getting Started with the Tenant Portal 7
- Accessing the Tenant Portal 8
- Signing Up for a Portal Account 9
- Signing In to the Tenant Portal 11
- Resetting Your Tenant Portal Password 12
- Navigating the Tenant Portal in the New View 13

My Account 15
- Actions Drop-Down List 16
- Community Messages Section 17
- Account Summary Section 18
- My Rentals/Account Details 19
- Giving Notice 20
- Open Service Requests Section 21
- Creating a New Service Request 22
- Request Details 24
- Request Details Section 26
- Viewing Service Request Details 27
- Creating a New Service Request 28
- Editing a Service Request 30
- Cancelling a Service Request 32
- Maintenance Documents Section 33
- Viewing the List of Attached Maintenance Documents 34
- Opening and Managing Documents Attached to the Service Request 35
- Attaching a Document to the Service Request 36
- Conversations Section of Service Request Details 37
- Viewing the List of Conversations 38
- Adding a New Comment to an Existing Conversation 39
- Starting a New Conversation 40
- View All Requests 41
- Conversations Section 42
- Viewing the List of Conversations 43
- Adding a New Comment to an Existing Conversation 44
- Starting a New Conversation 45

My Payments 47
- Make a One-Time Payment - Adding a Payment Account 48
- Adding an E-Check Payment Account 50
- Adding a Credit Card Payment Account 52

Schedule Recurring Payment 54
Scheduling a Recurring Payment 55
Make a One-Time Payment - Adding a Payment Account 57
Adding an E-Check Payment Account 59
Adding a Credit Card Payment Account 61
Payment Accounts 63
Viewing and Managing Your Payment Accounts 64
Make a One-Time Payment - Adding a Payment Account 65
Adding an E-Check Payment Account 67
Adding a Credit Card Payment Account 69
Make a One-Time Payment 71
Make a One-Time Payment - E-Check or Credit Card 72
Make a One-Time Payment - Cash 74
Scheduling a Recurring Payment 78
View Scheduled Payments 80
Viewing Scheduled Payments 81
Viewing and Managing Recurring Payments 82
Filtering Portfolio and Date Range on My Ledger 83
Downloading a Copy of My Ledger 84
Navigating and Managing the List of Transactions 84

Service Requests 85

Viewing the List of Service Requests 86
Request Details 87
Request Details Section 89
Viewing Service Request Details 90
Creating a New Service Request 91
Editing a Service Request 93
Cancelling a Service Request 95
Maintenance Documents Section 96
Viewing the List of Attached Maintenance Documents 97
Opening and Managing Documents Attached to the Service Request 98
Attaching a Document to the Service Request 99
Conversations Section of Service Request Details 100
Viewing the List of Conversations 101
Adding a New Comment to an Existing Conversation 102
Starting a New Conversation 103
Creating a New Service Request 104

Documents 107

Insurance 109

 © 2019 RealPage, Inc.

User Menu 110
Viewing or Editing My Contact Info 111
Changing Your Tenant Portal Password 111
Using Return to 112
Logging Out of the Tenant Portal 112
Switching to Dark Navigation 113

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.

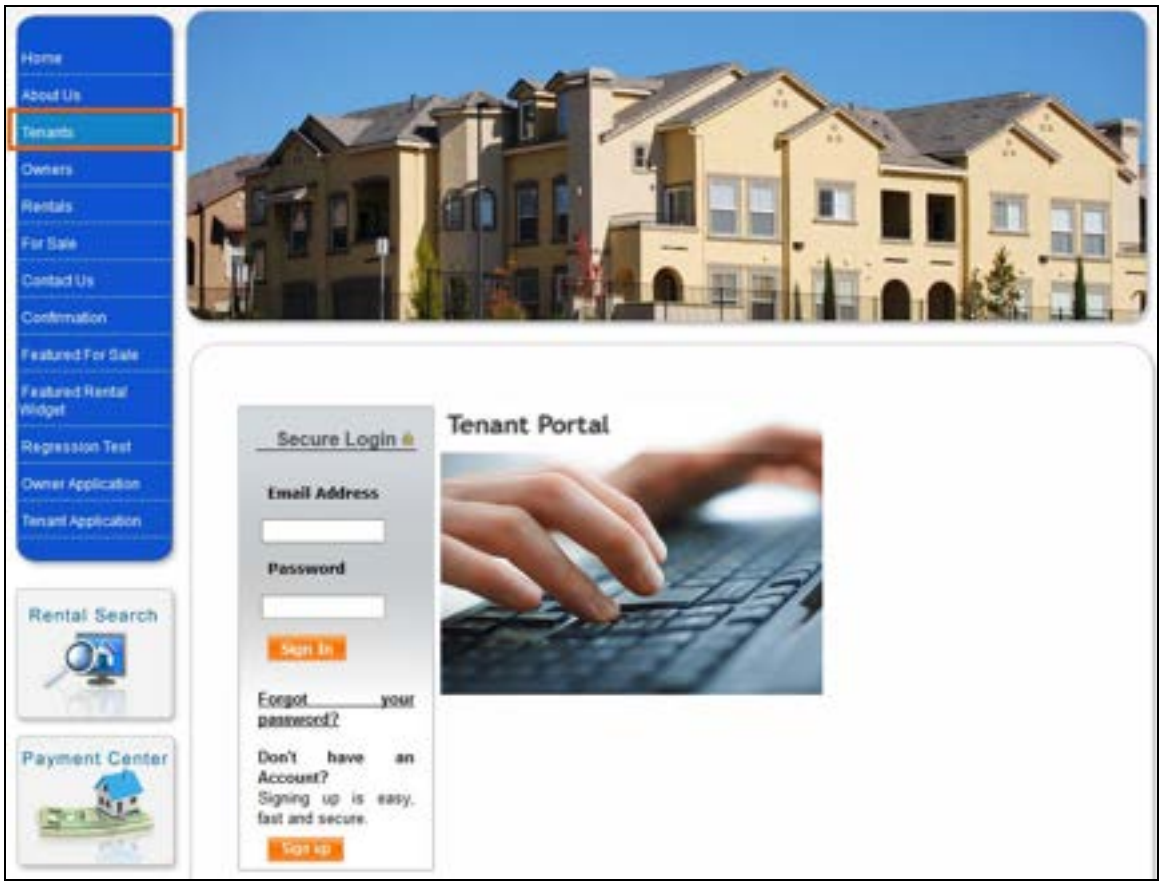
In This Chapter

Accessing the Tenant Portal....8
Signing Up for a Portal Account....9
Signing In to the Tenant Portal....11
Resetting Your Tenant Portal Password....12
Navigating the Tenant Portal in the New View....13

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.



 © 2019 RealPage, Inc.

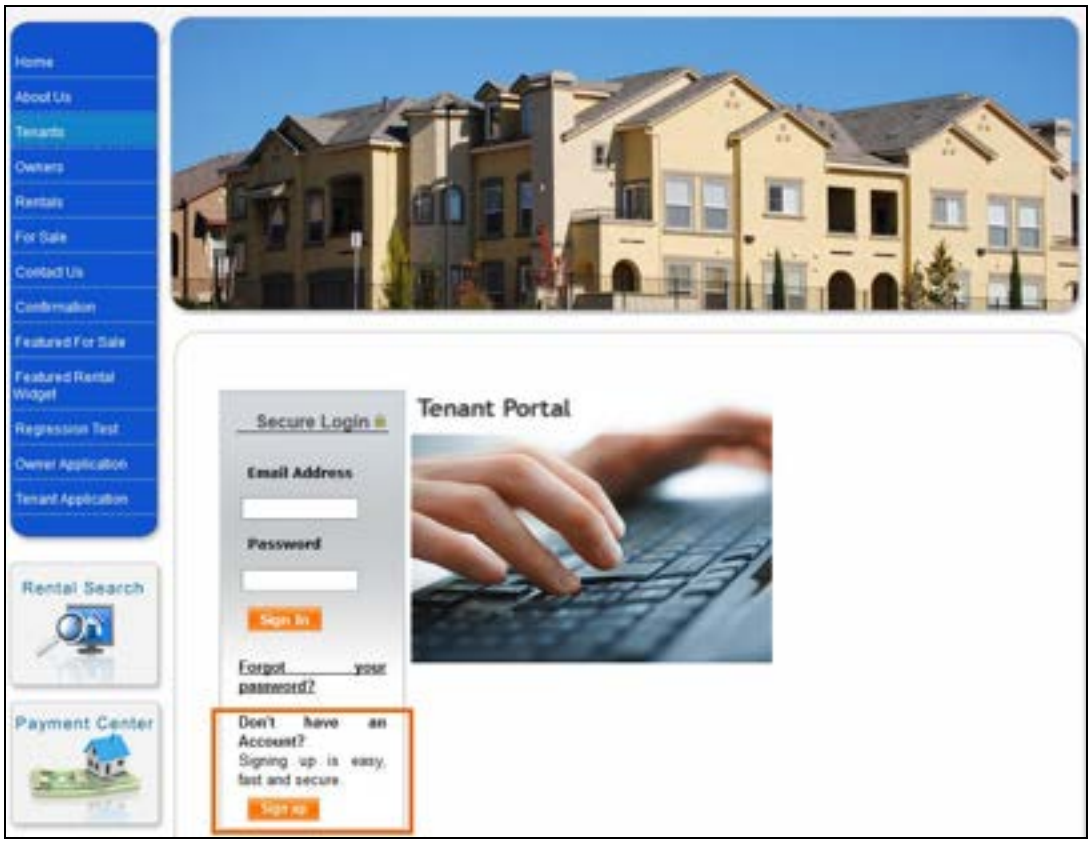
Signing Up for a Portal Account

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

You must have an email address to have an account to your owner 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 **Sign Up** button.



The **Sign Up** page opens.

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

The information you submit must match to 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 a password and sign-on instructions.
4. Use the instructions in the email message to sign on to your Tenant Portal account.

 © 2019 RealPage, Inc.

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

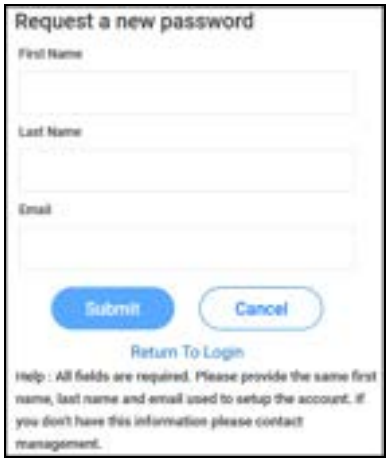
If you lose or forget your Tenant Portal password, you can reset it from the **Login** page.

***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.

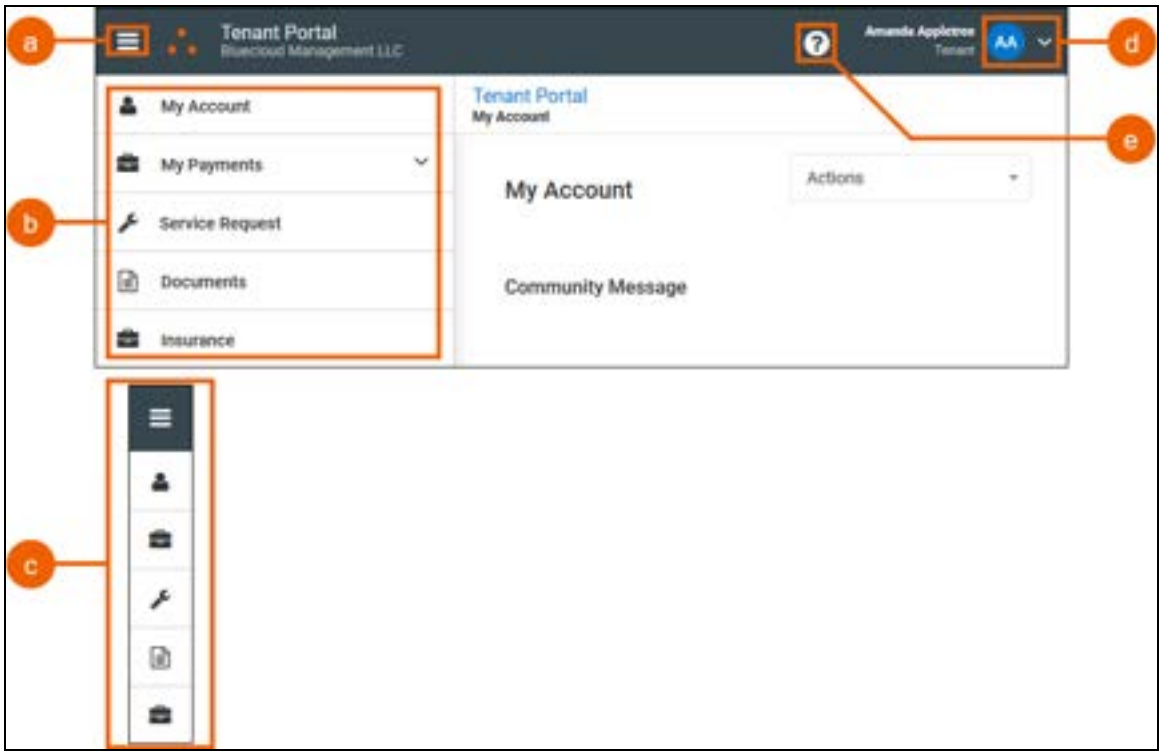
   After you sign in to the Tenant Portal, you will be prompted to choose a new password.

 © 2019 RealPage, Inc.

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 110): 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 15): Provides an overview of your profile, your lease, and your contact information and lets you communicate with your management team.
- **My Payments** (on page 47): Provides payment details about your lease.
- **Service Request** (on page 85): 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 107): Provides links to shared building, lease, or other documents posted by the property manager.
- **Insurance** (on page 109): Contains information about your renter's insurance policy.

 © 2019 RealPage, Inc.

CHAPTER 2

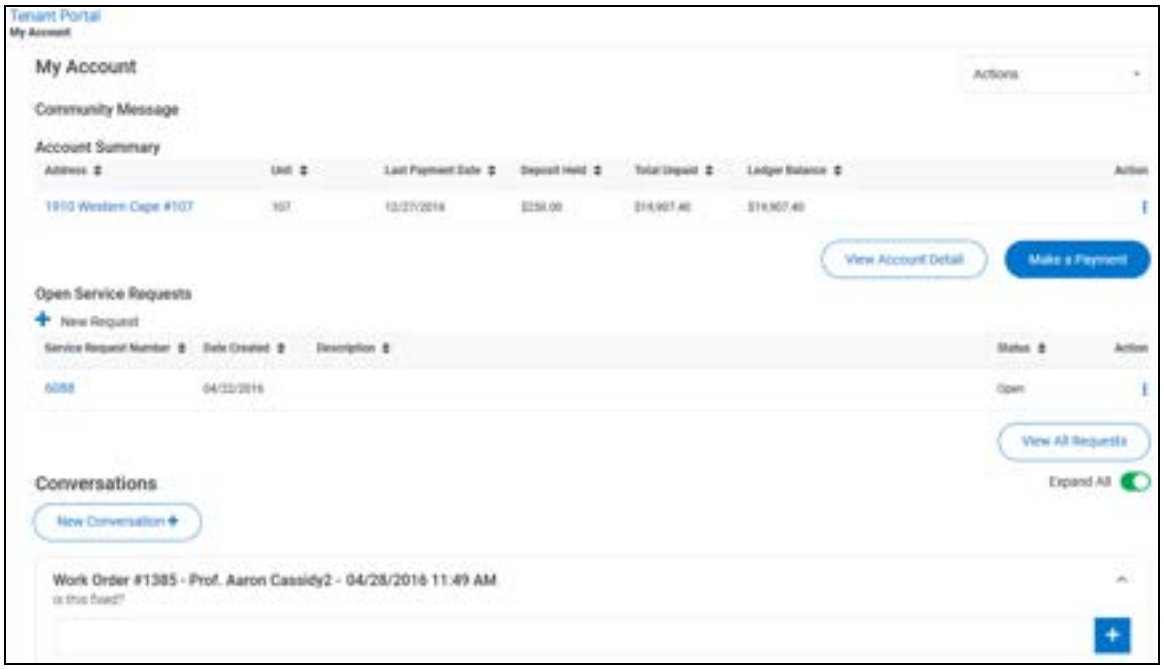
My Account

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 17): Used by your management company to post messages to you and other tenants.
- *Account Summary* section (on page 18): 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 21): 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 42): Allows you to have conversations with your management team.



In This Chapter

Actions Drop-Down List 16
Community Messages Section 17
Account Summary Section 18
Open Service Requests Section 21
Conversations Section 42

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 71): Opens the **Make a One-Time Payment** page.
- **New Conversation**: Opens the **New Conversation** pane and start a conversation.
- **New Service Request** (on page 22): Opens the **New Service Request** pane and create a service request.
- **View Scheduled Payments** (on page 80): Opens the **Scheduled Payments** page.
- **Change Email/Password (on page 111):** Opens the **Change Password** pane.
- **Edit Contact Information** (on page 110): Opens the **Contact Info** page.

 © 2019 RealPage, Inc.

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 19) page for that property.
  - **Make One-Time Payment**: Select to open the **Make a One-Time Payment (on page 71)** 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 71) page.

 © 2019 RealPage, Inc.

My Rentals/Account Details

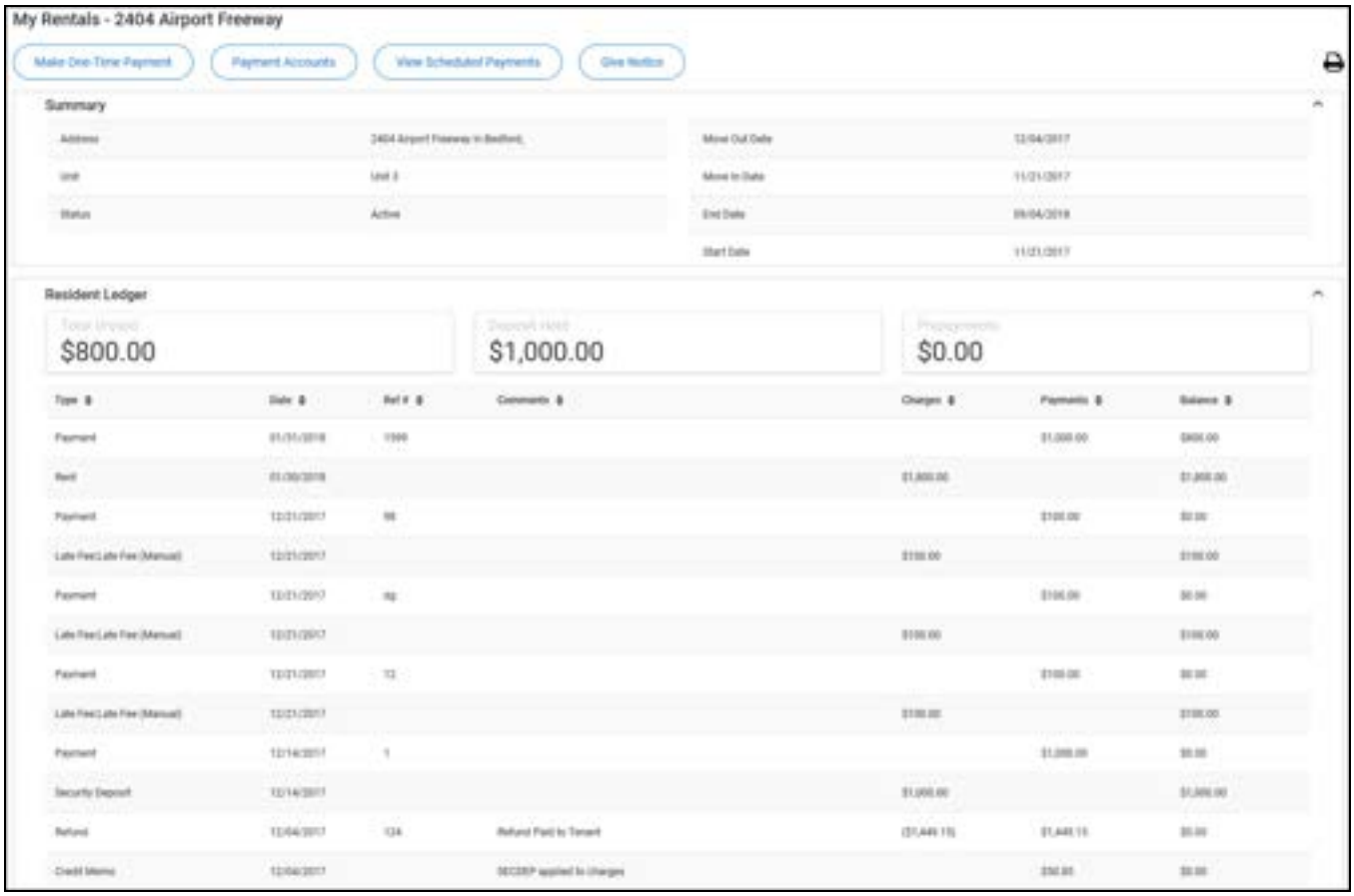
The **My Rentals** page allows you to review the details of your leases.

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:

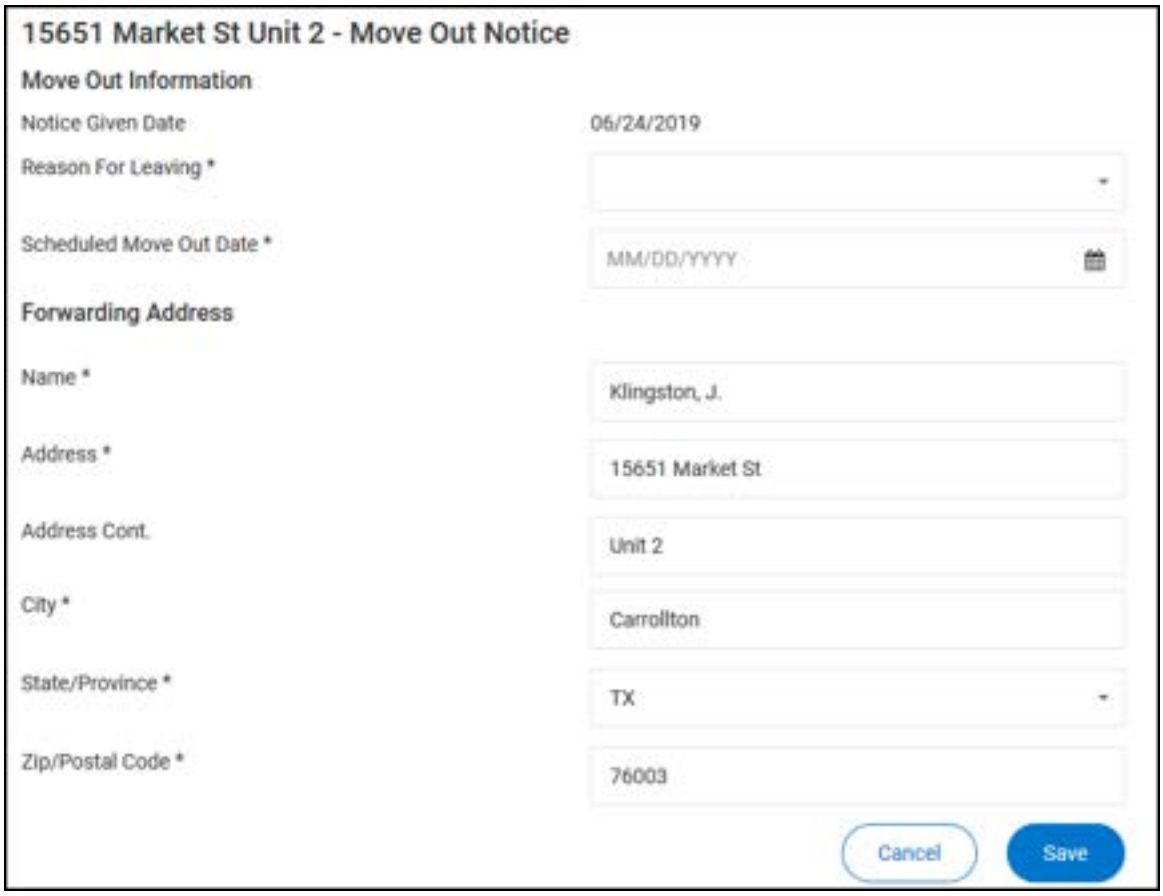
- **Make a One-Time Payment** (on page 71): Click to make an online payment for your account or to set up a payment account.
- **Payment Accounts** (on page 63): Click to open the **Payment Accounts** page
- **View Scheduled Payments** (on page 80):
- **Give Notice** (on page 20): Click to notify your 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**.



 © 2019 RealPage, Inc.

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.

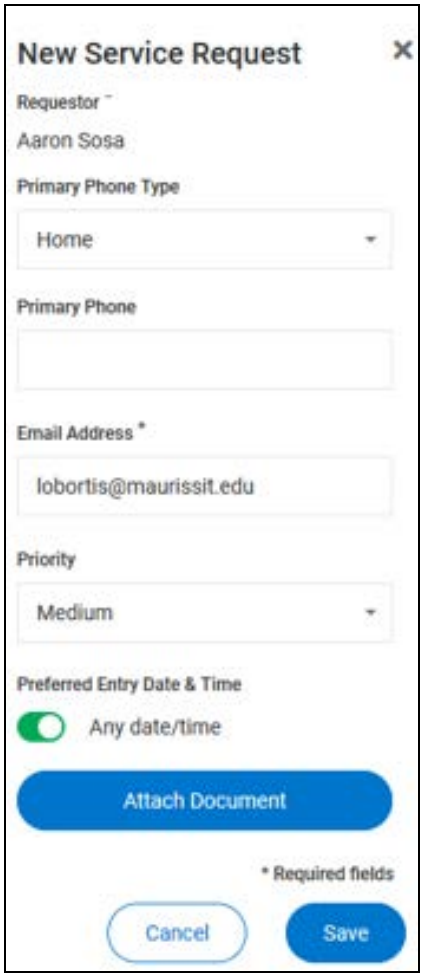
Click **View All Requests** to open the **Service Requests** (on page 85) page where you can view all service requests, both open and closed.

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.

 © 2019 RealPage, Inc.

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.

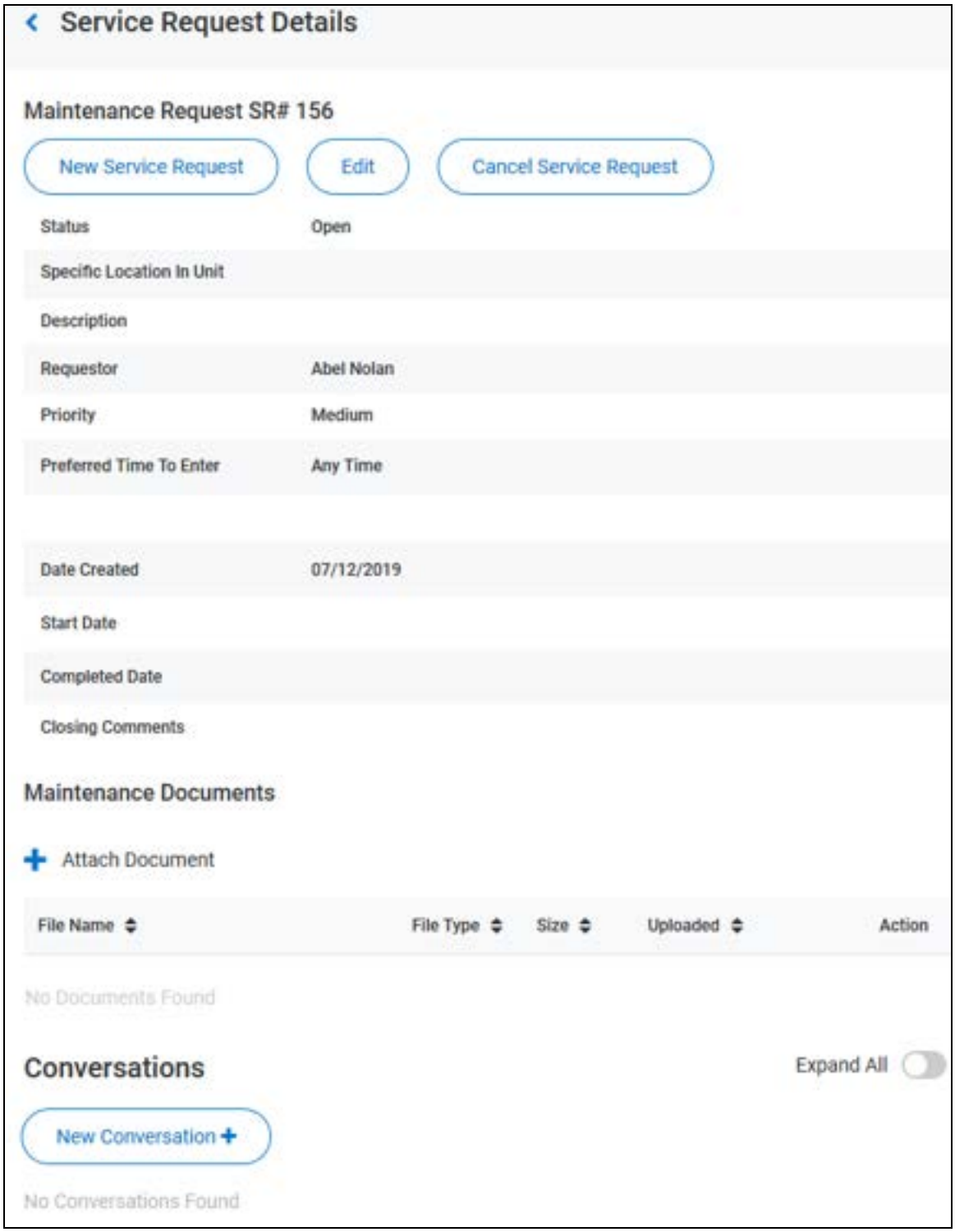
Request Details

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 27).
  - Create a new service request (on page 22).
  - Edit a service request (on page 30).
  - Cancel a service request (on page 32).
- *Maintenance Documents* section - In this section, you can:
  - View documents attached to the service request (on page 35).
  - Attach a document to the service request (on page 36).
- *Conversations* section - In this section, you can:
  - View a list of conversations concerning the service request (on page 38).
  - Add a new message to an existing conversation (on page 39).
  - Create a new conversation for the service request (on page 40).

 © 2019 RealPage, Inc.

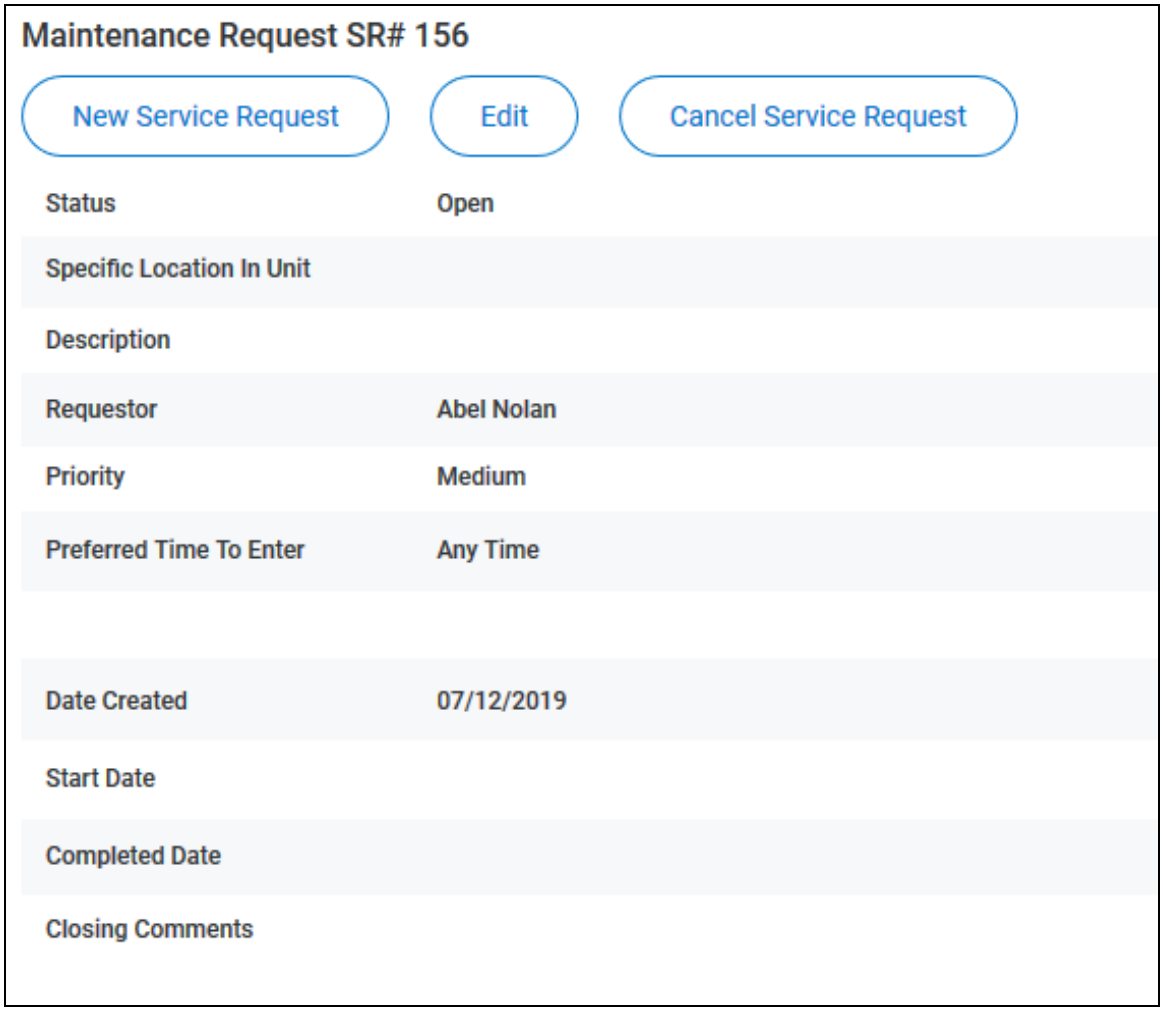
To open the **Service Request Details** page, from the **Service Requests** page or the *Open Service Requests* section of the **My Account** page, click the **Service Request Number** link for a service request.



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 27).
- Create a new service request (on page 22).
- Edit a service request (on page 30).
- Cancel a service request (on page 32).



 © 2019 RealPage, Inc.

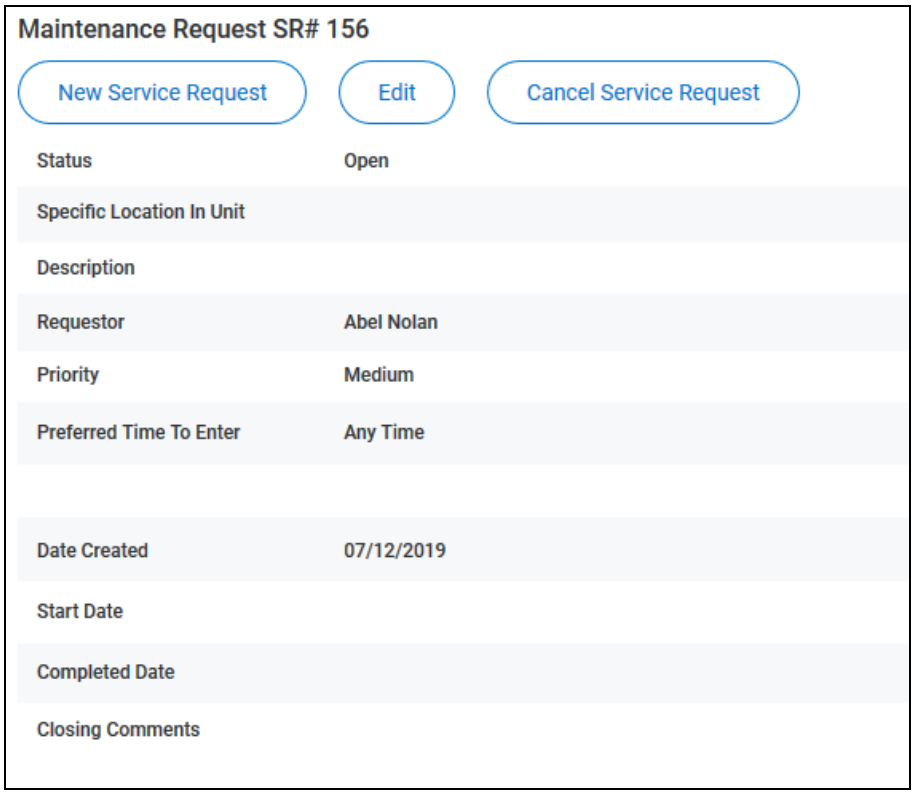
Viewing Service Request Details

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.

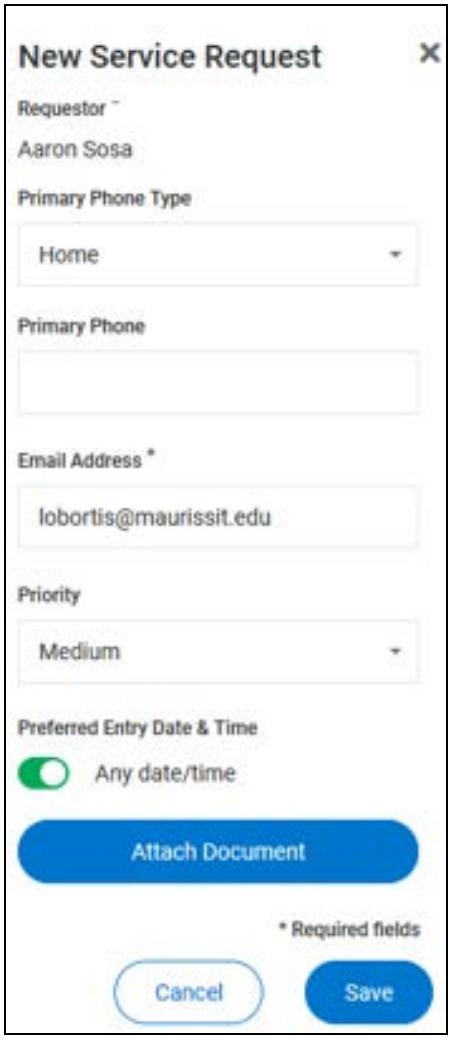


Creating a New Service Request

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.

 © 2019 RealPage, Inc.

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.

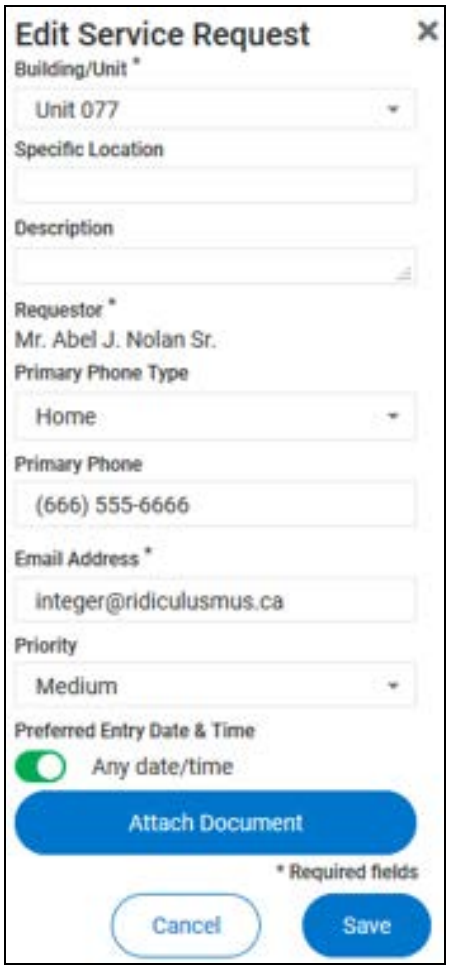
    The new service request is created and appears in the list of open service requests.

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.

 © 2019 RealPage, Inc.

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.

 © 2019 RealPage, Inc.

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 34).
- Open and manage documents attached to the service request (on page 35).
- Attach a document to the service request (on page 36).

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 35).

 © 2019 RealPage, Inc.

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.

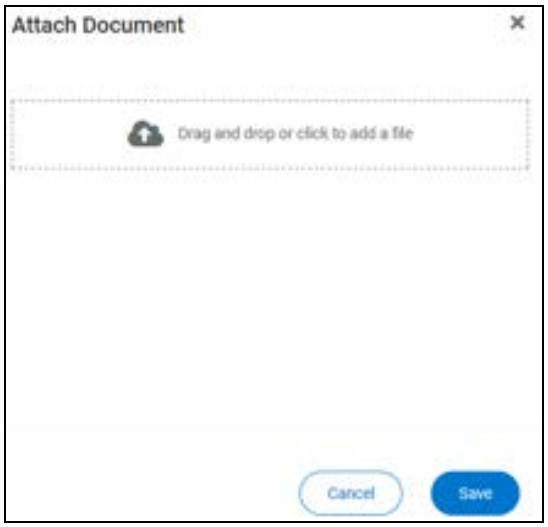
To open an attached document, click the **Action** icon associated with the document, then select **View** from the list that opens. The document opens.

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.

 © 2019 RealPage, Inc.

Conversations Section of Service Request Details

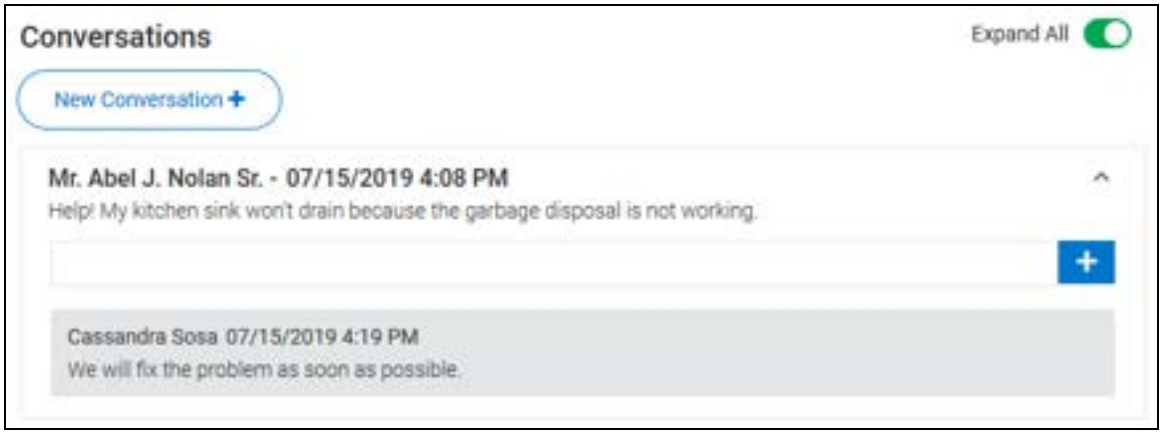
The *Conversations* section of the **Service Request Details** page lists conversations regarding the service request.

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 38).
- Add a comment to an existing conversation (on page 39).
- Start a new conversation (on page 40).



Viewing the List of Conversations

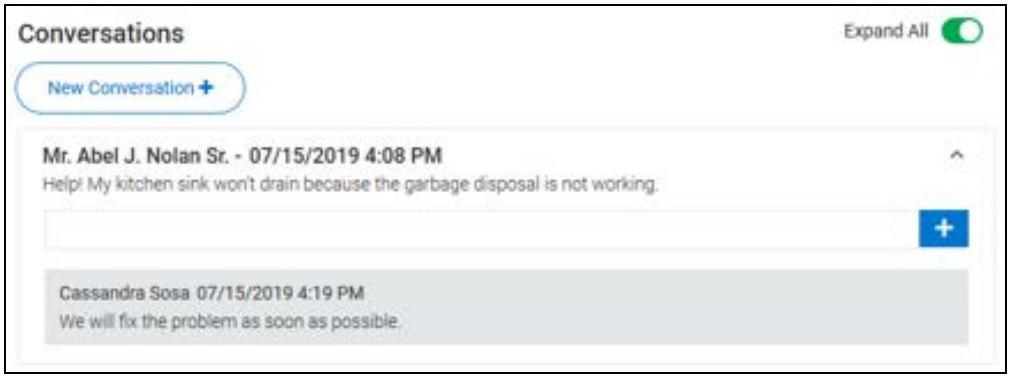
In the *Conversations* sections of the **My Account** page and the **Service Request Details** page, you can view a list of conversations.

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:

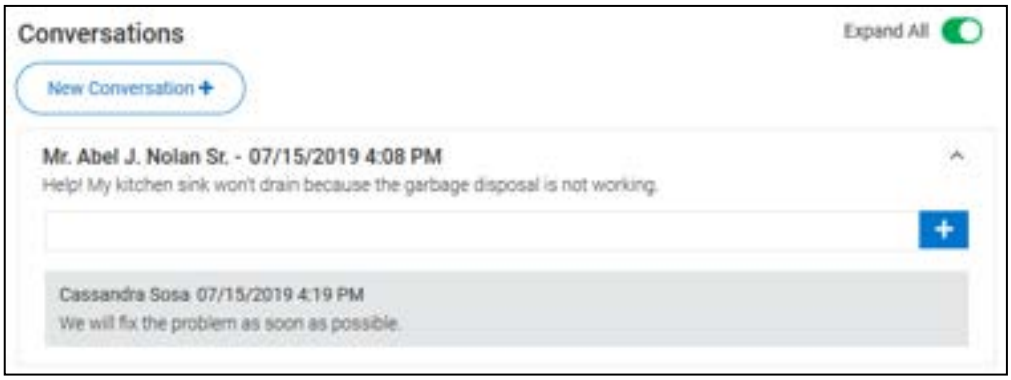
- The name of the person who started the conversation.
- The name of the person who made each comment.
- The date and time the conversation or comment was created.
- A **Comment** text box that allows you to add a comment to the conversation (on page 39).



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.



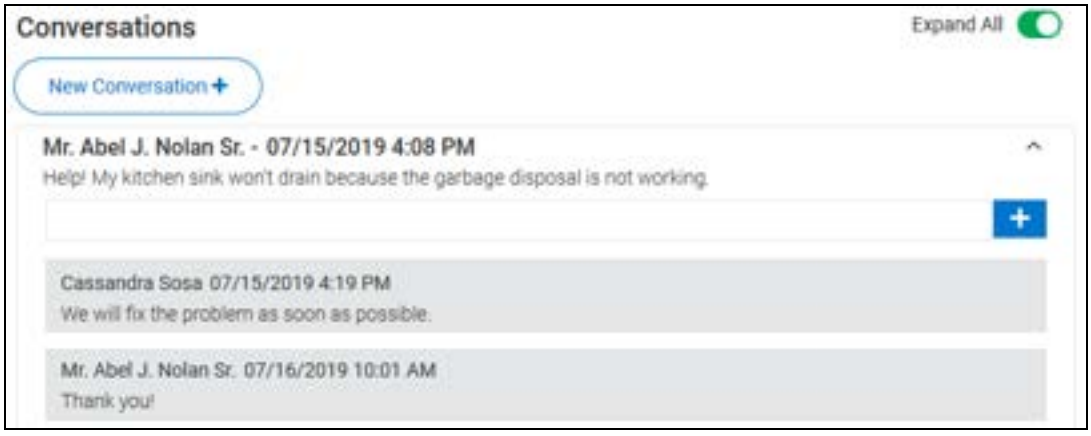
 © 2019 RealPage, Inc.

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.

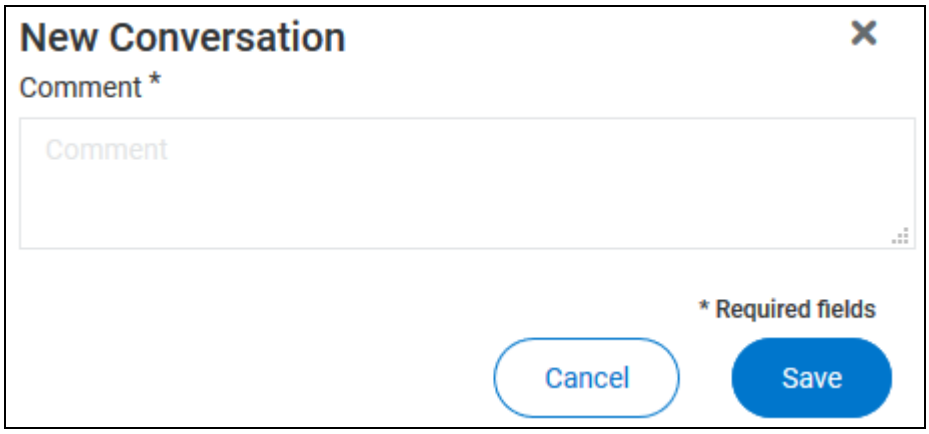


Starting a New Conversation

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.

 © 2019 RealPage, Inc.

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.

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

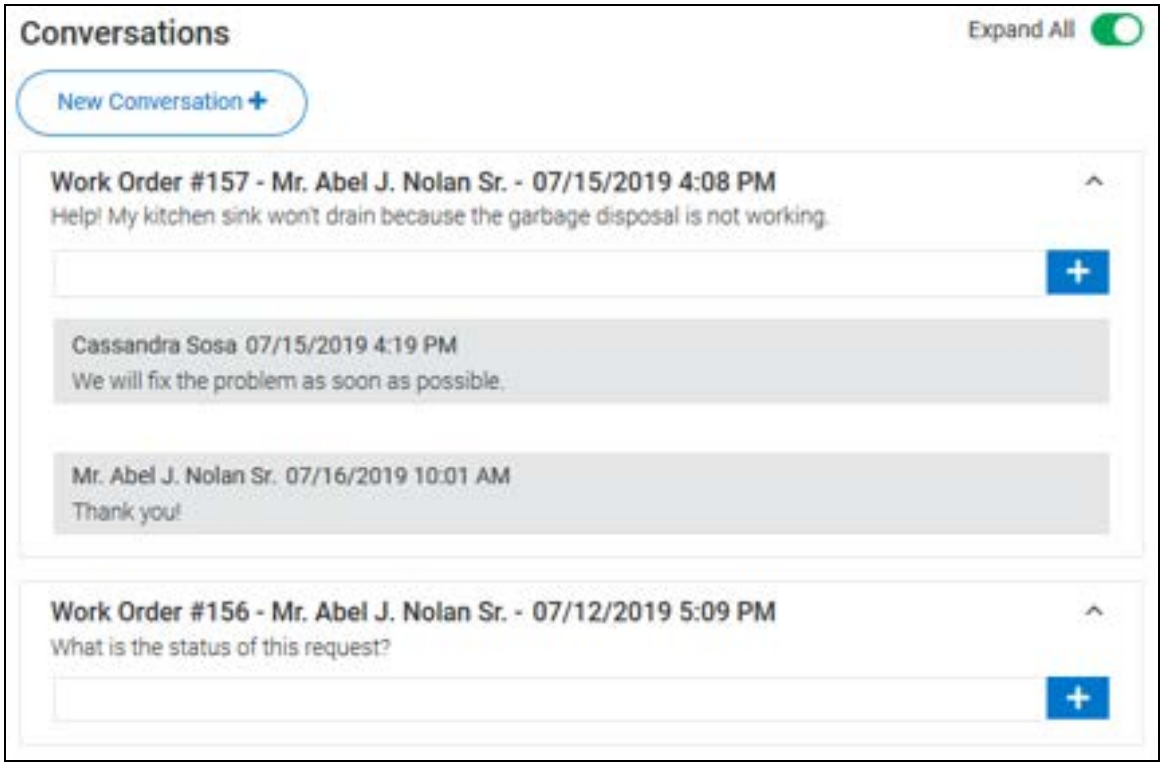
The **Service Requests** page opens with all service requests listed.

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 38).
- Add a new comment to an existing conversation (on page 39).
- Start a new conversation (on page 40).



 © 2019 RealPage, Inc.

Viewing the List of Conversations

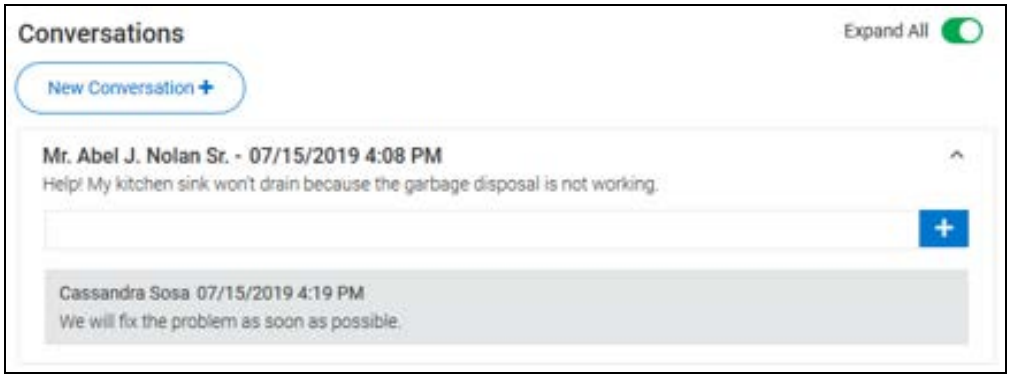
In the *Conversations* sections of the **My Account** page and the **Service Request Details** page, you can view a list of conversations.

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:

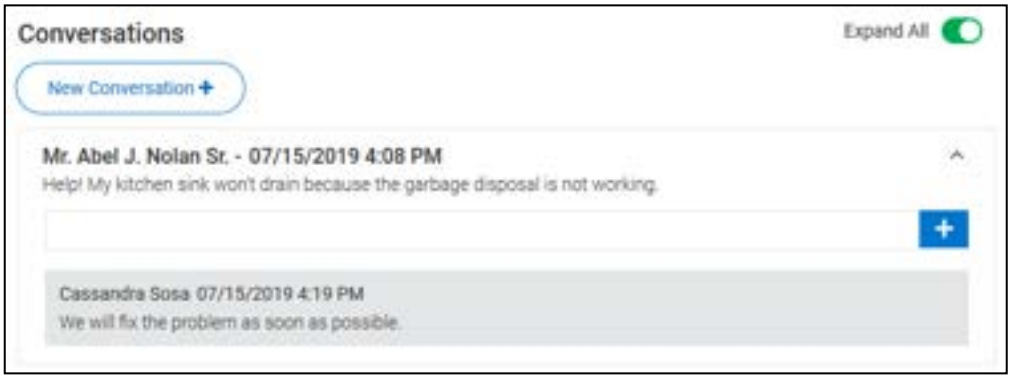
- The name of the person who started the conversation.
- The name of the person who made each comment.
- The date and time the conversation or comment was created.
- A **Comment** text box that allows you to add a comment to the conversation (on page 39).



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.

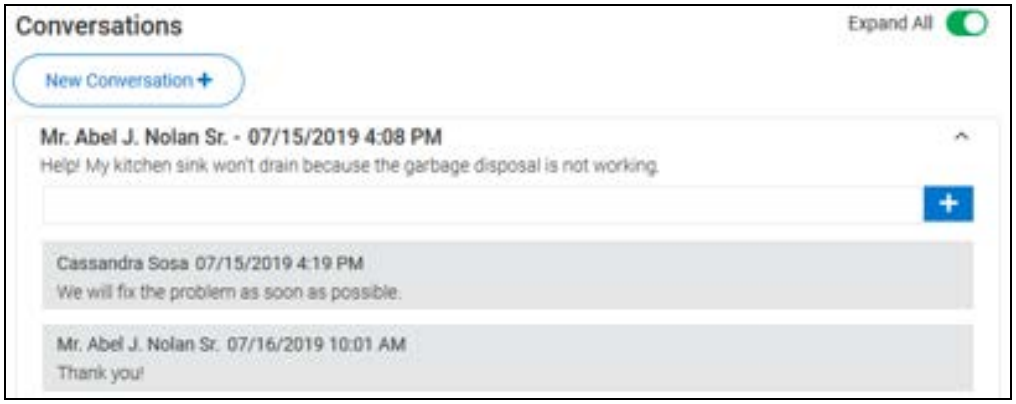


Adding a New Comment to an Existing Conversation

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.



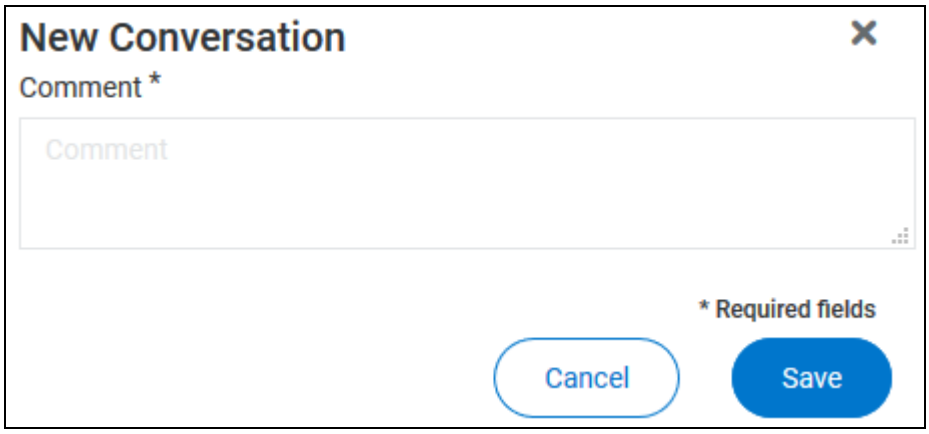
 © 2019 RealPage, Inc.

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 71): Click to open the **Make a One-Time Payment** page and make a single online payment.
- **Schedule Recurring Payment** (on page 54): 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 63): 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 80): 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

Make a One-Time Payment - Adding a Payment Account 48
Schedule Recurring Payment 54
Payment Accounts 63
View Scheduled Payments 80
Filtering Portfolio and Date Range on My Ledger 83
Downloading a Copy of My Ledger 84
Navigating and Managing the List of Transactions 84

Make a One-Time Payment - 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.

 © 2019 RealPage, Inc.

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 50).
- To set up a credit card payment account, select **Credit Card**, then follow the instructions in **Adding a Credit Card Payment Account** (on page 52).

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)

 © 2019 RealPage, Inc.

5. Click **Save**.

Tenant Portal
My Payments / New Payment Account
New Payment Account - E-Check
E-Check
Credit Card
Account Information
Bank Name *
Account Number *
Re-enter Account Number *
Routing Number *
Account Nickname *
Account Type
Checking
Billing Information
First Name *
Last Name *
Billing Address *
Address 2
City *
State *
State
Zip/Postal Code *
Birth Date
Billing Email
Cancel
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**:

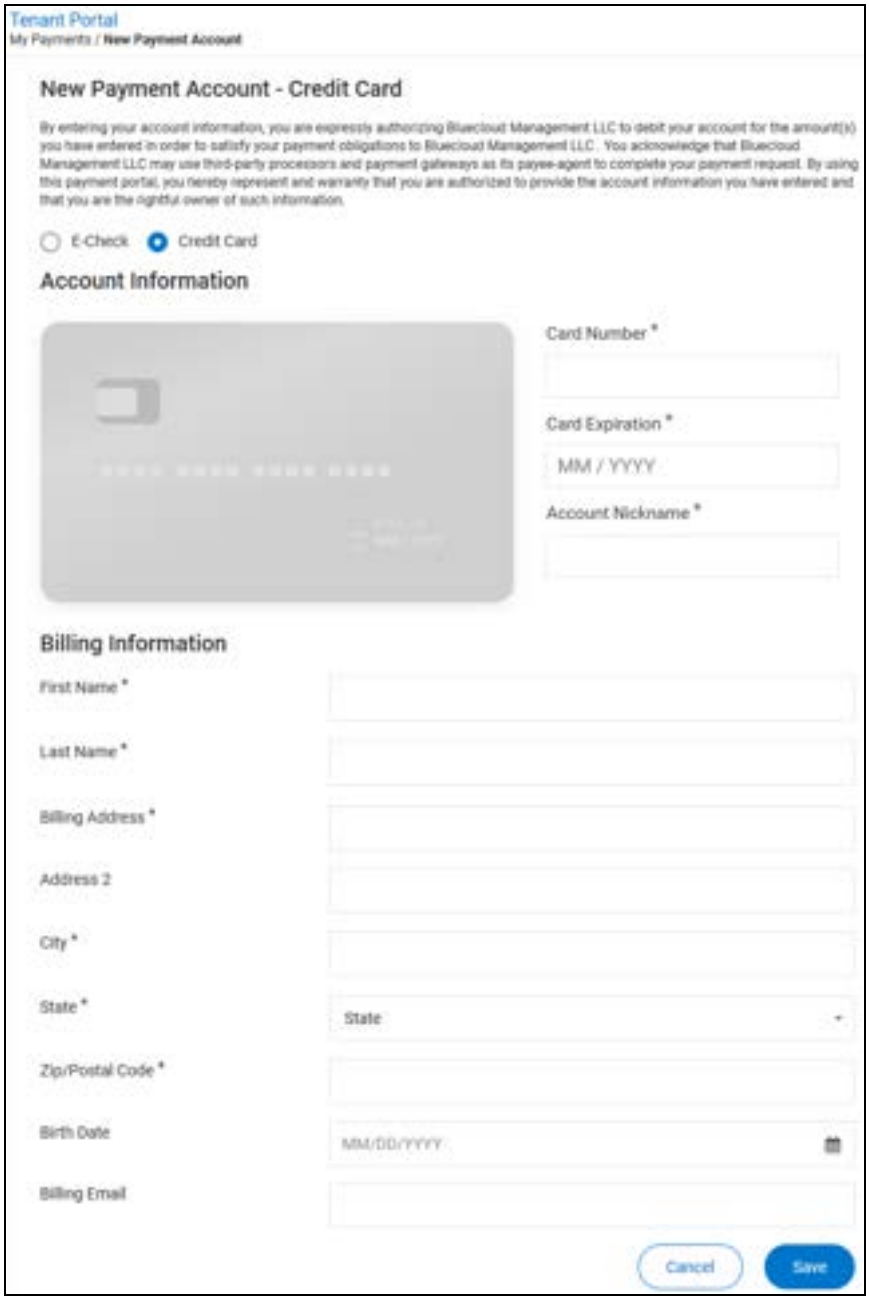
   - **Card Number**
   - **Card Expiration**
   - **Account Nickname**

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)

 © 2019 RealPage, Inc.

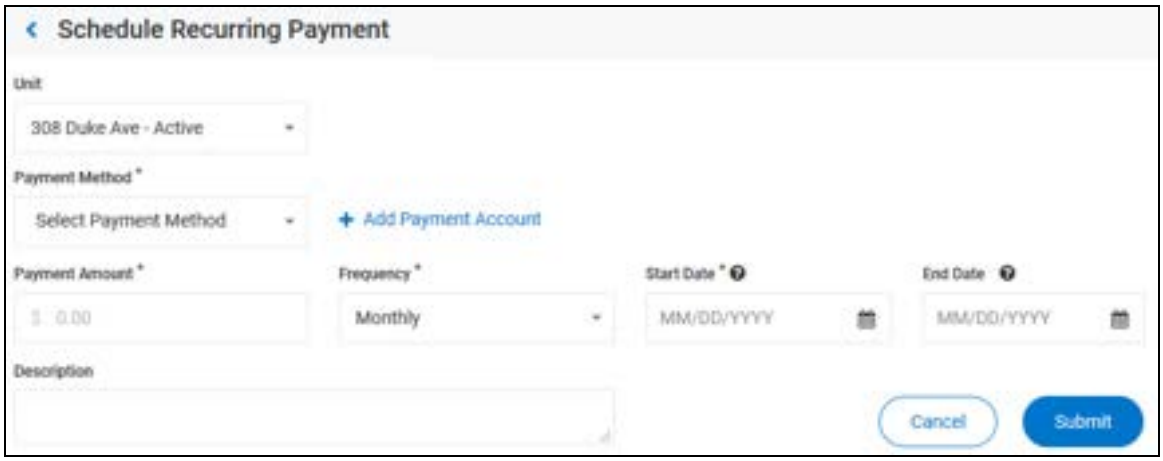
4. Click **Save**.


Tenant Portal
My Payments / New Payment Account
New Payment Account - Credit Card
By entering your account information, you are expressly authorizing Bluecloud Management LLC to debit your account for the amount(s) you have ordered in order to satisfy your payment obligations to Bluecloud Management LLC. You acknowledge that Bluecloud Management LLC may use third-party processors and payment gateways as its payee-agent to complete your payment request. By using this payment portal, you hereby represent and warranty that you are authorized to provide the account information you have entered and that you are the rightful owner of such information.
E-Check
Credit Card
Account Information
Card Number *
Card Expiration *
MM / YYYY
Account Nickname *
Billing Information
First Name *
Last Name *
Billing Address *
Address 2
City *
State *
State
Zip/Postal Code *
Birth Date
MM/DD/YYYY
Billing Email
Cancel
Save

Schedule Recurring Payment

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

- Set up a recurring payment from an existing payment account (on page 55).
- Add a new payment account (on page 48).

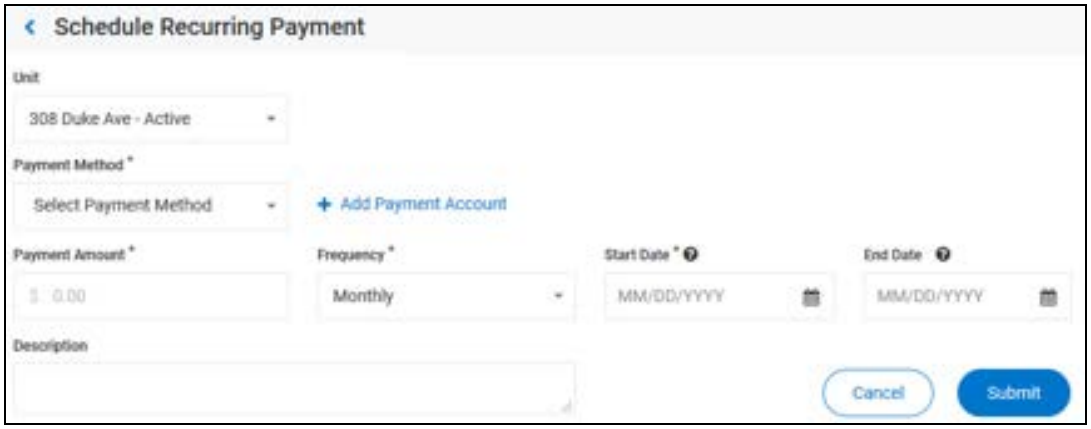


 © 2019 RealPage, Inc.

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 48) 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 48).
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.

 © 2019 RealPage, Inc.

Make a One-Time Payment - 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 50).
- To set up a credit card payment account, select **Credit Card**, then follow the instructions in **Adding a Credit Card Payment Account** (on page 52).

 © 2019 RealPage, Inc.

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**.

 © 2019 RealPage, Inc.

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.

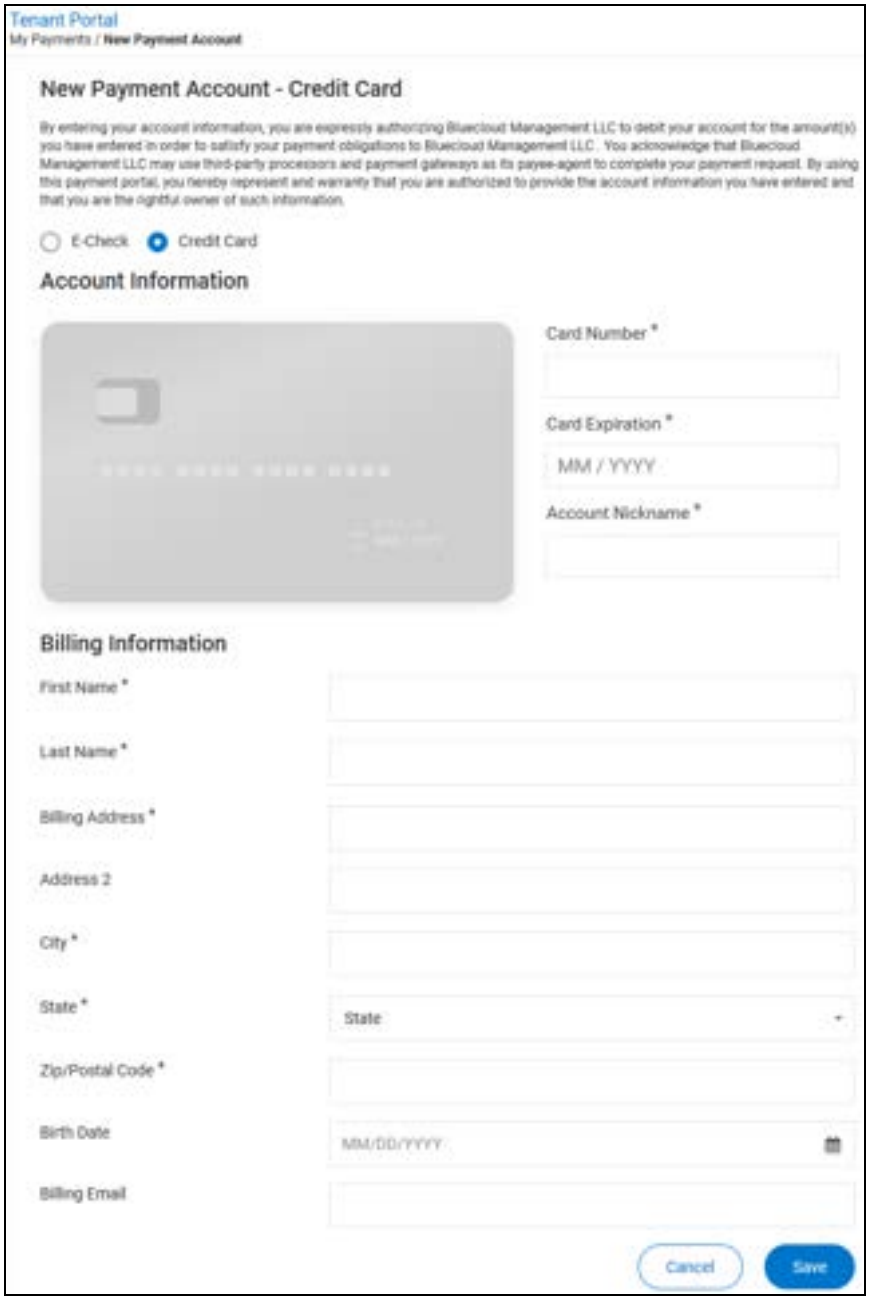
2. Provide the **Account Information**:

   - **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**.

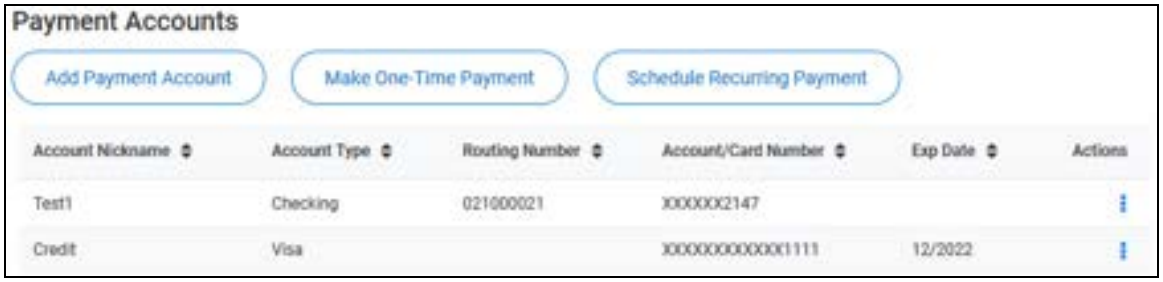


 © 2019 RealPage, Inc.

Payment Accounts

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

- View and manage a list of your payment accounts (on page 64).
- Add a payment account (on page 48).
- Make a one-time payment (on page 71).
- Schedule a recurring payment (on page 54).

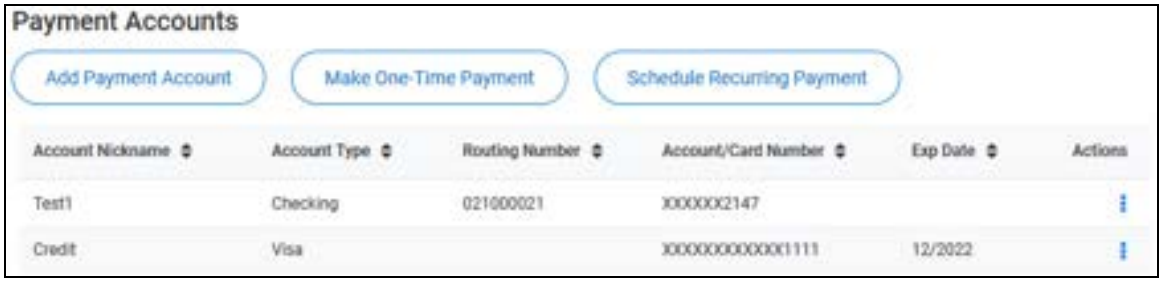


Viewing and Managing Your Payment Accounts

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**.

 © 2019 RealPage, Inc.

Make a One-Time Payment - 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 50).
- To set up a credit card payment account, select **Credit Card**, then follow the instructions in **Adding a Credit Card Payment Account** (on page 52).

 © 2019 RealPage, Inc.

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**.

 © 2019 RealPage, Inc.

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.

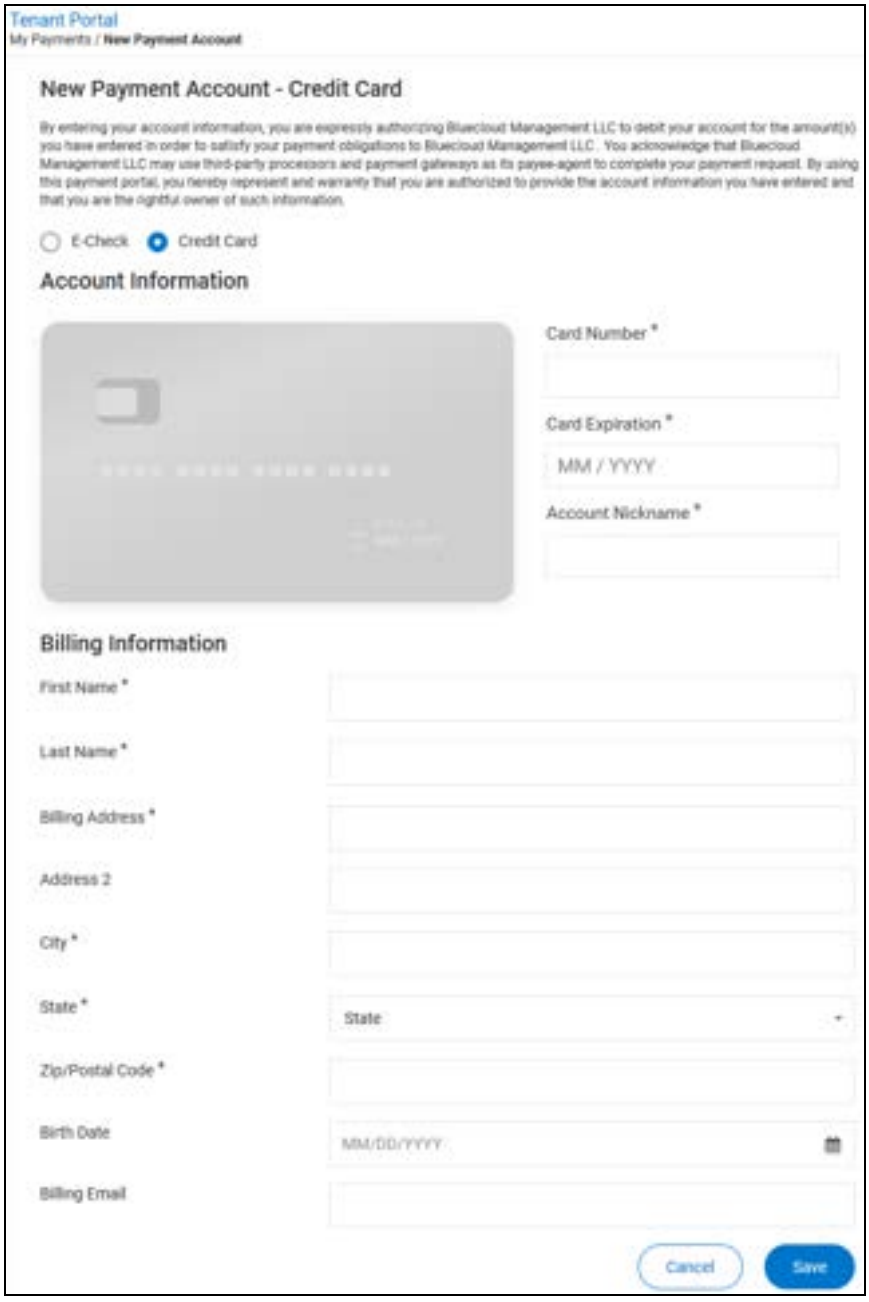
2. Provide the **Account Information**:

   - **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**.



 © 2019 RealPage, Inc.

Make a One-Time Payment

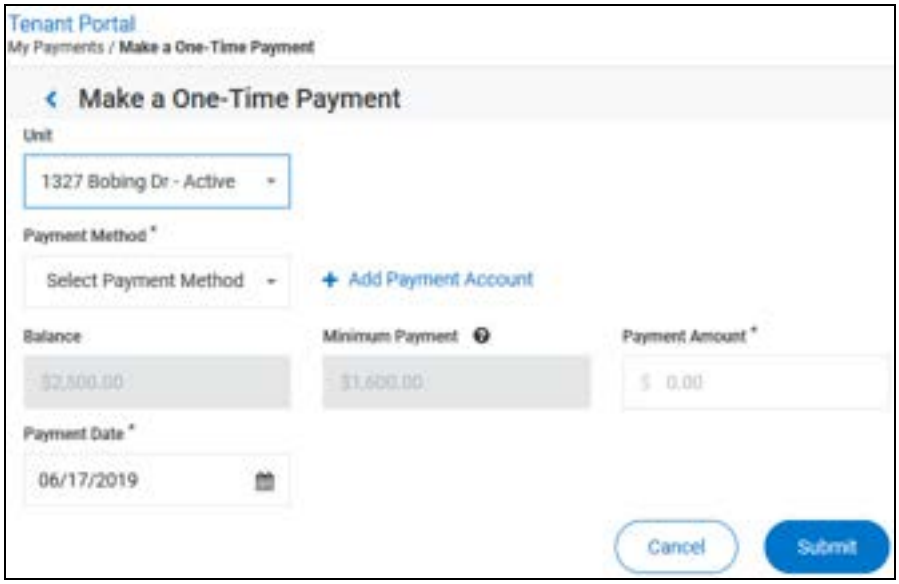
On the **Make a One-Time Payment** page, you can:

- Make a one-time payment via E-Check or Credit Card (on page 72).
- Make a one-time payment using cash (on page 74).
- Click **Add Payment Account** (on page 48) 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**.

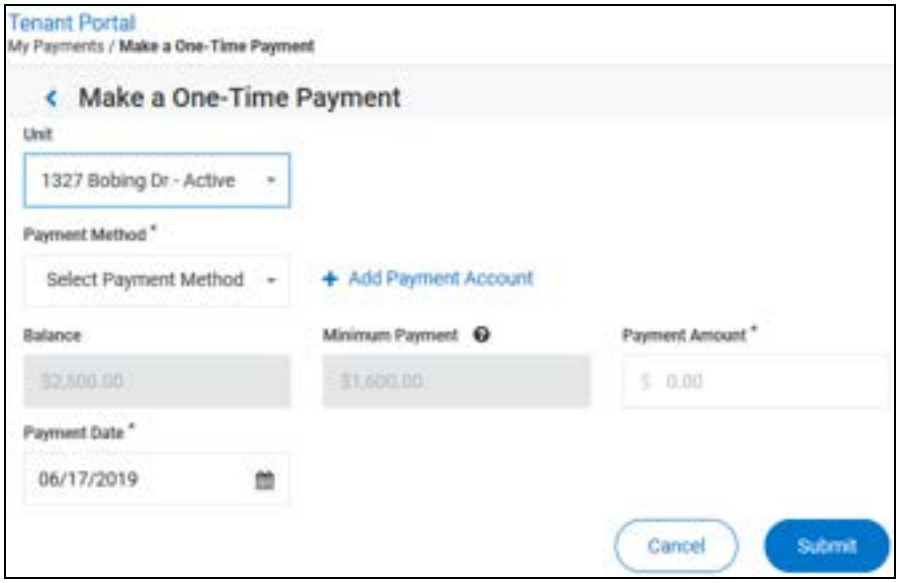
If you do not have a payment account set up, you can only make cash one-time payments (if your property management company allows cash payments).



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 48) 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 74).

   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.

 © 2019 RealPage, Inc.

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**.

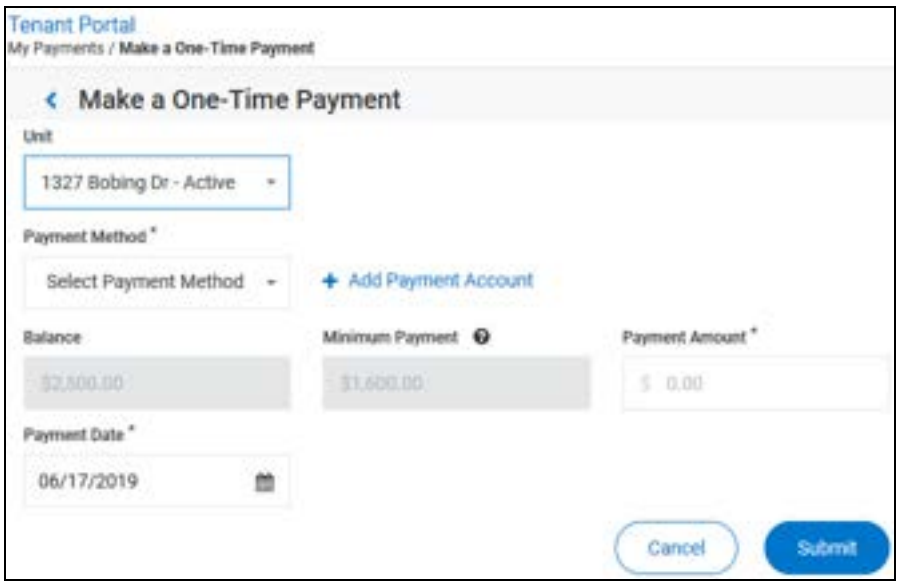
   A **Confirm Payment** dialog opens and displays the **Payment Amount** and the **Total Amount** (the **Payment Amount** plus any convenience fees).

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:

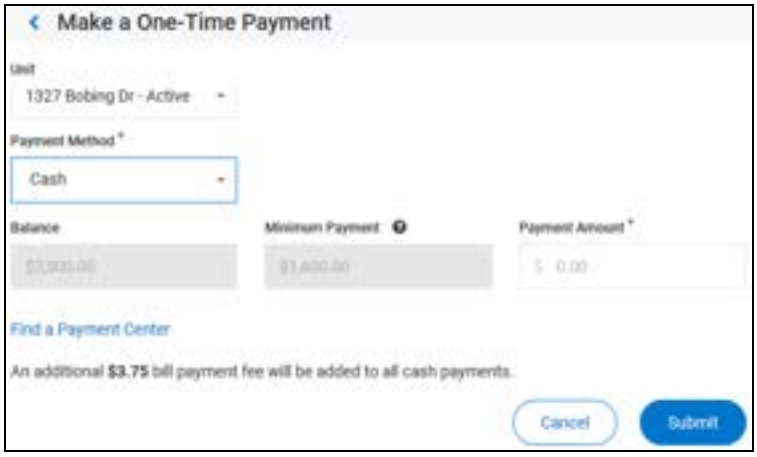
1. Open the **Make a One-Time Payment** page from one of these locations:
   - From the **My Payments** navigation menu item, by selecting **Make a One-Time Payment**.
   - From the **Payment Accounts** page, by clicking **Make One-Time Payment**.
   - From the **Scheduled Payments** page, by clicking **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.

 © 2019 RealPage, Inc.

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.

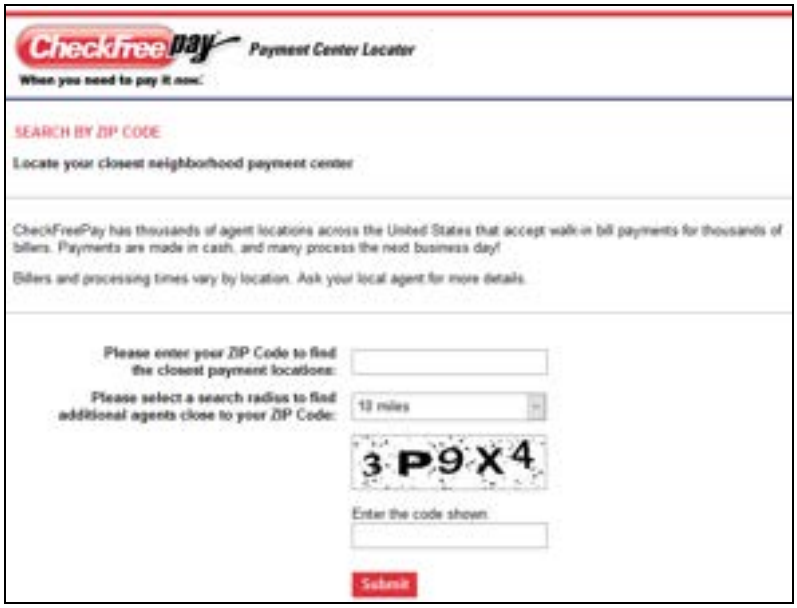


4. In the **Payment Amount** text box, type the amount of the payment.

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.



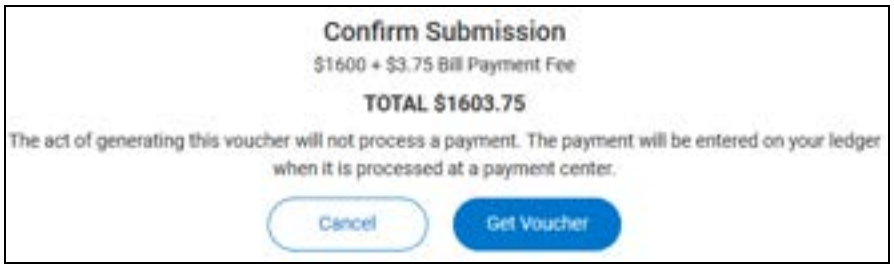
6. Complete the fields on the **Payment Center Locator** page then submit your responses.

   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.

 © 2019 RealPage, Inc.

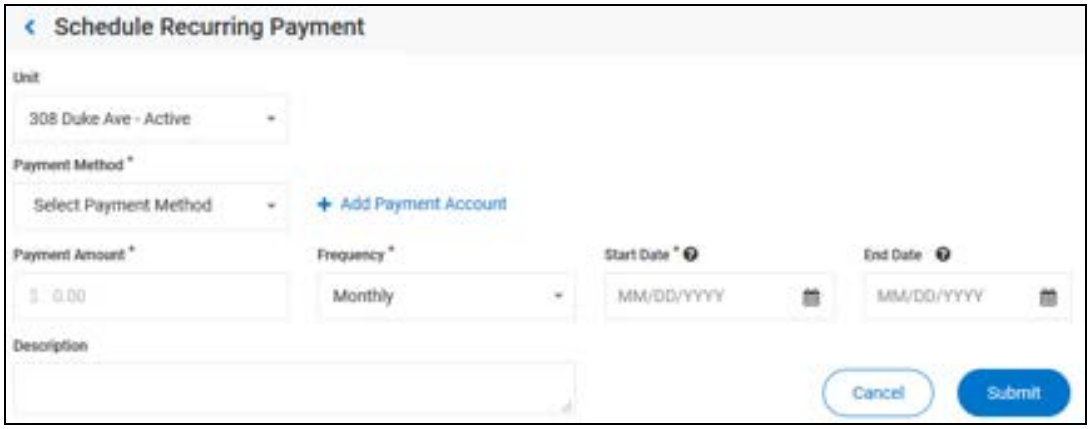
9. To complete your RentMoney payment, follow the steps included on the voucher.
10. You can print the voucher and give it to the payment center associate, or you can give the associate the account and payment information included on the voucher:
    - **Biller Name**: RentMoney
    - **Account Number**: 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 48) 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 48).
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.

 © 2019 RealPage, Inc.

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.

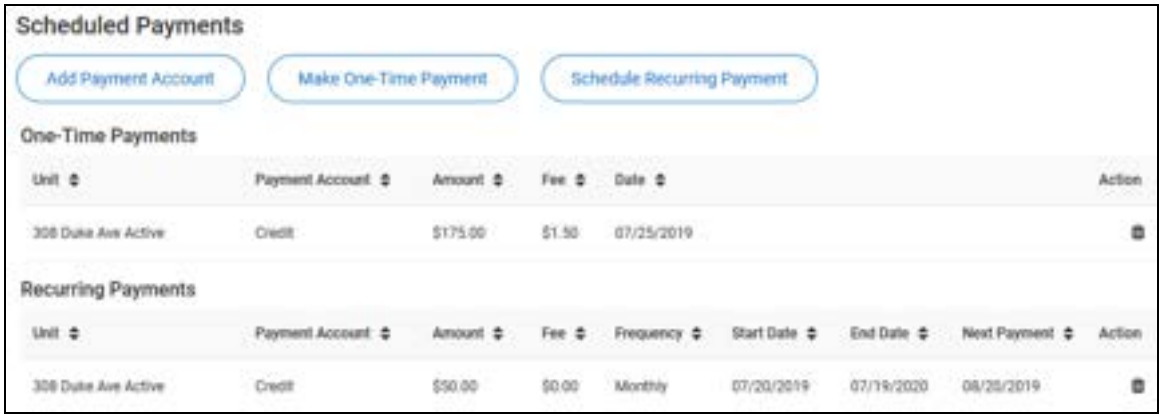
View Scheduled Payments

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 81).
- View and manage established recurring payments (on page 82).
- Add a payment account (on page 48).
- Make a one-time payment (on page 71).
- Schedule a recurring payment (on page 55).



 © 2019 RealPage, Inc.

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.

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.

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

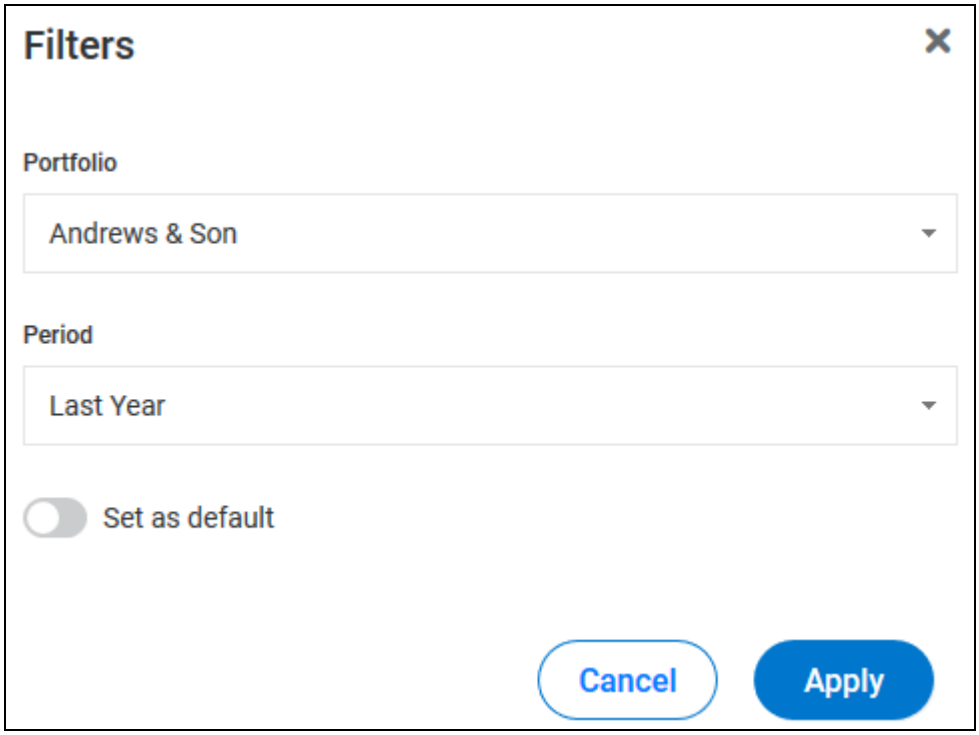
 © 2019 RealPage, Inc.

Filtering Portfolio and Date Range on My Ledger

To change the portfolio and date range for the data presented on **My Ledger**:

1. Click the **Filter** icon .

   The **Filters** panel appears.



2. In the **Portfolio** drop-down list, select the portfolio to feature on **My Ledger**.
3. In the **Period** drop-down list:
   - Select a preset date range ("Last Year", "This Month", etc.).

   - or -

   - Select "Custom Date Range" then type or select a **Start Date** and **End Date** for your custom date range.
4. To make the portfolio and date range the default data set for **My Ledger**, click the **Set as Default** toggle switch. The switch turns green when **Set as Default** is enabled.
5. Click **Apply**.

   The information presented on **My Ledger** changes to reflect the portfolio and date range you selected.

Downloading a Copy of My Ledger

To download a copy of the data in the *Portfolio* section of **My Ledger**:

1. Use the **Portfolio** and **Period** filters (on page 83) and page navigation tools to locate the data you would like to download.
2. Click the **Download** icon .
3. Your browser opens a download dialog.
4. Configure the settings in the download dialog and click the appropriate button to complete the download.

Navigating and Managing the List of Transactions

To navigate through the list of transactions in the *Portfolio* section of **My Ledger** and manage the number of transactions shown on a single page:

1. To set the number of items that appear on a single page of the transaction list, click the **Show XXX Entries** drop-down list, then select the number of transactions to appear on a page.
2. To view a specific page in the list, click the **Page XX of XX box**, then type the desired page number.
3. To go to the next or previous page, click the **Next** icon or the **Previous** icon .

 © 2019 RealPage, Inc.

CHAPTER 4

Service Requests

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

- View the list of service requests (on page 86).
- View the details of a service request (on page 24).
- Edit a service request (on page 30).
- Cancel a service request (on page 32).
- Create a new service request (on page 22).

In This Chapter

Viewing the List of Service Requests 86
Request Details 87
Creating a New Service Request 104

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 24) 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 24).
  - Edit an open request (on page 30).
  - Cancel an open request (on page 32).

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

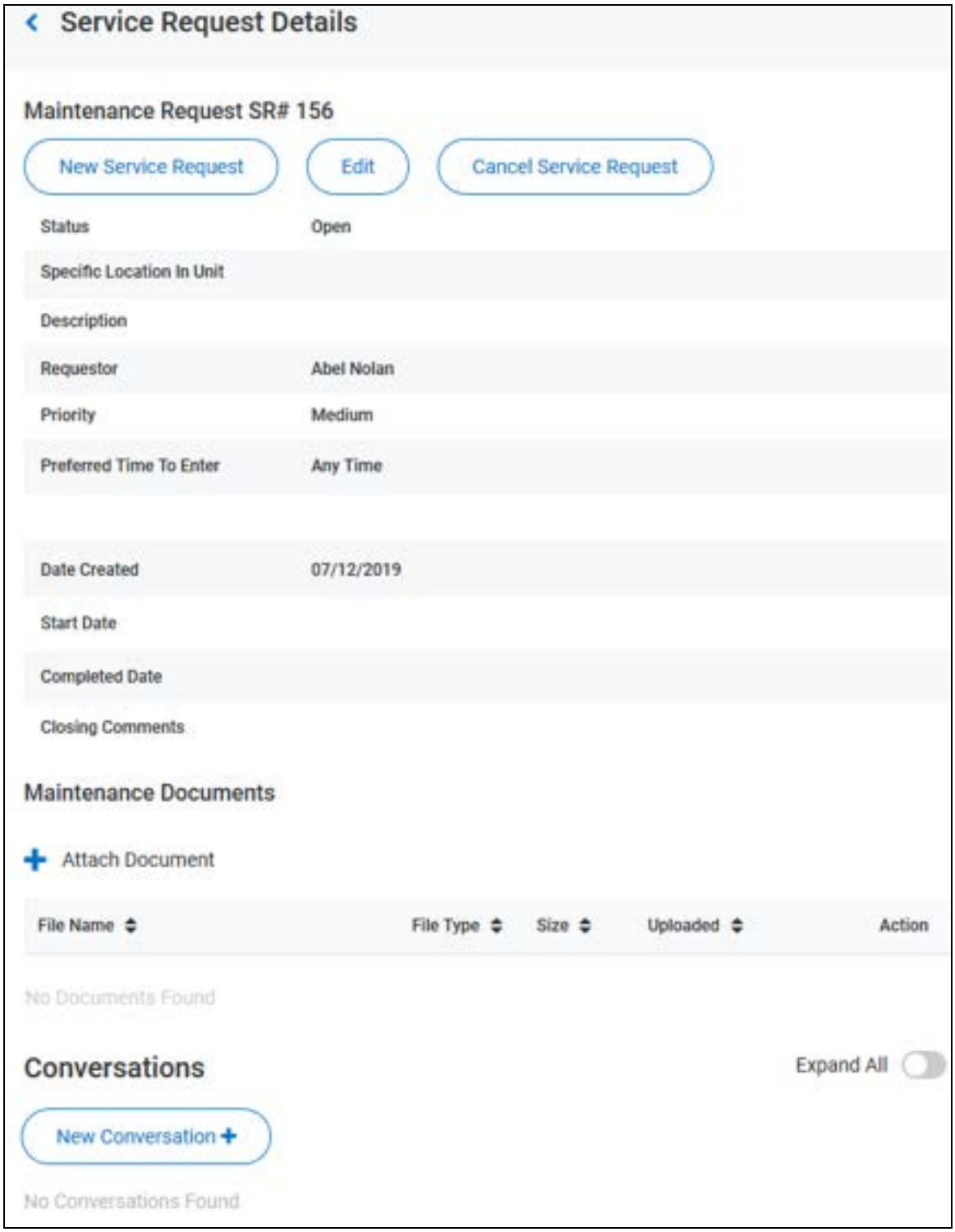
 © 2019 RealPage, Inc.

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 27).
  - Create a new service request (on page 22).
  - Edit a service request (on page 30).
  - Cancel a service request (on page 32).
- *Maintenance Documents* section - In this section, you can:
  - View documents attached to the service request (on page 35).
  - Attach a document to the service request (on page 36).
- *Conversations* section - In this section, you can:
  - View a list of conversations concerning the service request (on page 38).
  - Add a new message to an existing conversation (on page 39).
  - Create a new conversation for the service request (on page 40).

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.

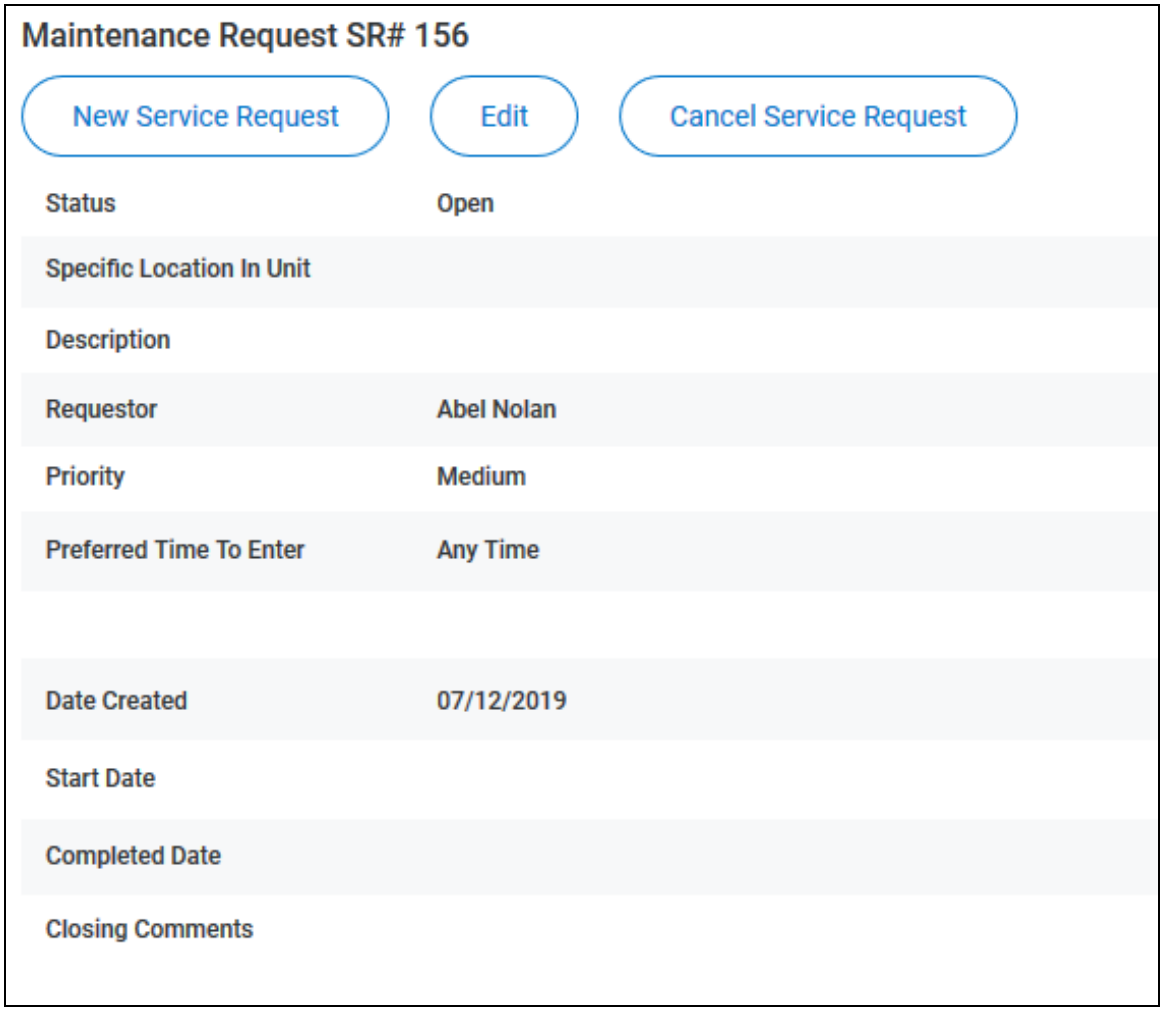


 © 2019 RealPage, Inc.

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 27).
- Create a new service request (on page 22).
- Edit a service request (on page 30).
- Cancel a service request (on page 32).



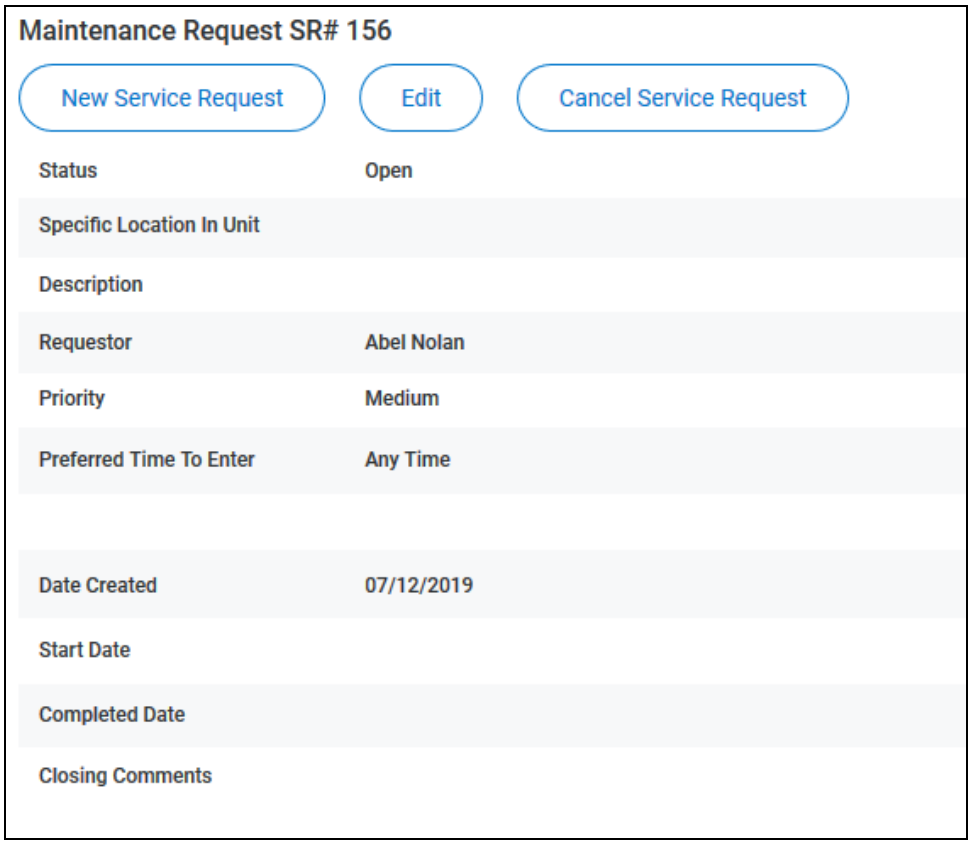
Viewing Service Request Details

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.



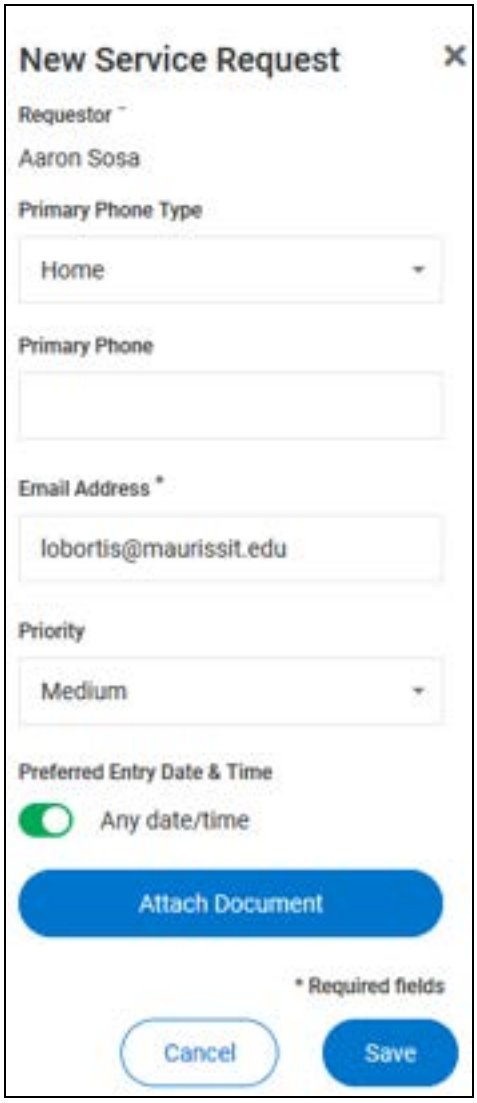
 © 2019 RealPage, Inc.

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.

 © 2019 RealPage, Inc.

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.

 © 2019 RealPage, Inc.

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 34).
- Open and manage documents attached to the service request (on page 35).
- Attach a document to the service request (on page 36).

 © 2019 RealPage, Inc.

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 35).

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.

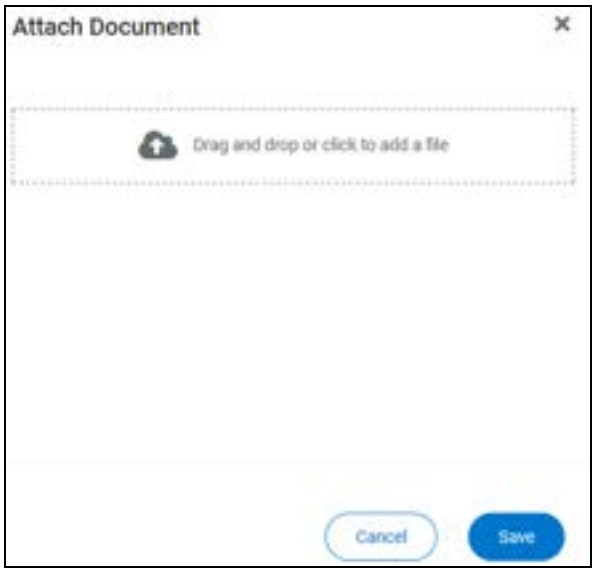
To delete an attached document, click the **Action** icon associated with the document, then select **Del** from the list that opens. The document is removed from the list of attached documents and is no longer attached to the service request.

 © 2019 RealPage, Inc.

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

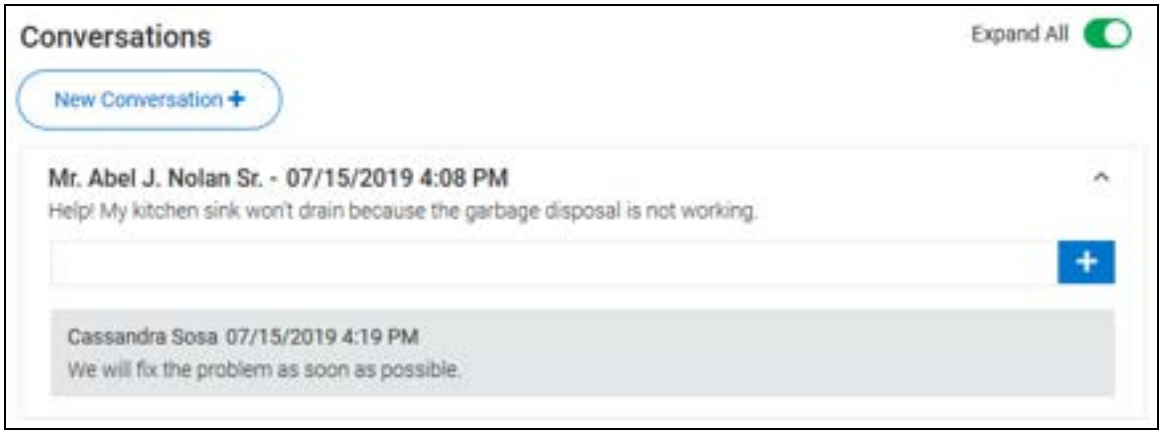
The *Conversations* section of the **Service Request Details** page lists conversations regarding the service request.

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 38).
- Add a comment to an existing conversation (on page 39).
- Start a new conversation (on page 40).



 © 2019 RealPage, Inc.

Viewing the List of Conversations

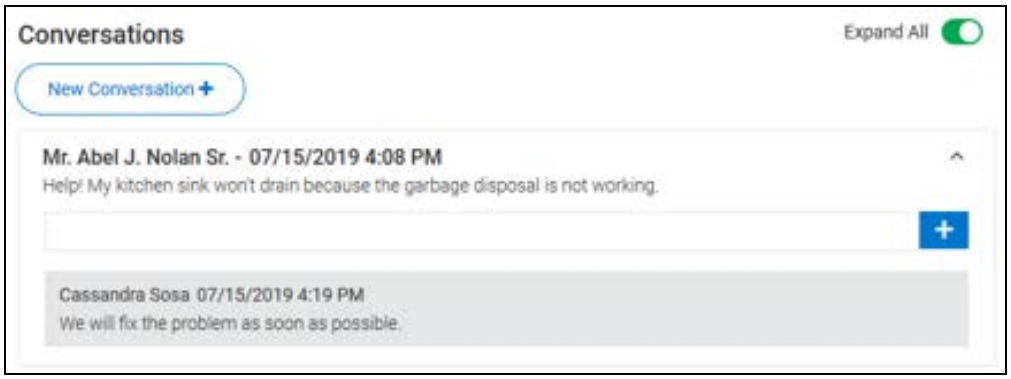
In the *Conversations* sections of the **My Account** page and the **Service Request Details** page, you can view a list of conversations.

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:

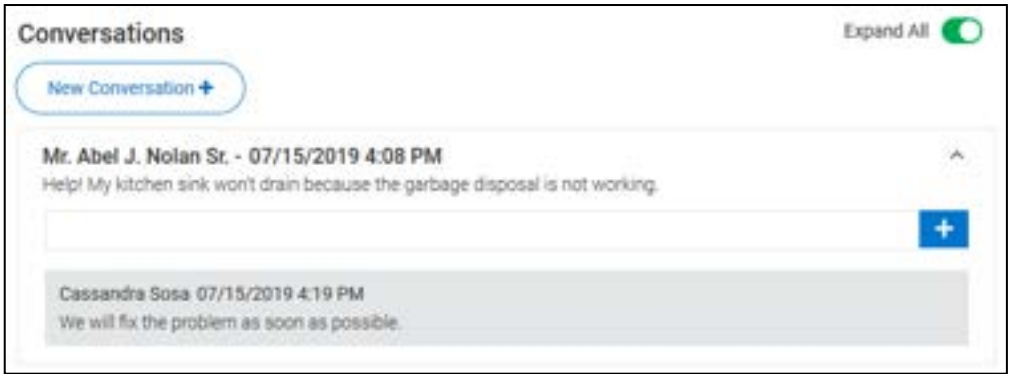
- The name of the person who started the conversation.
- The name of the person who made each comment.
- The date and time the conversation or comment was created.
- A **Comment** text box that allows you to add a comment to the conversation (on page 39).



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.

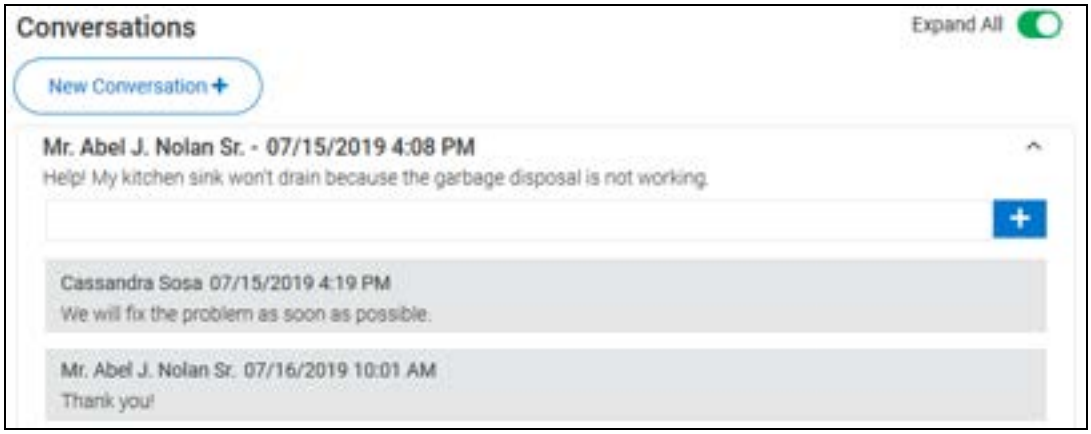


Adding a New Comment to an Existing Conversation

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.



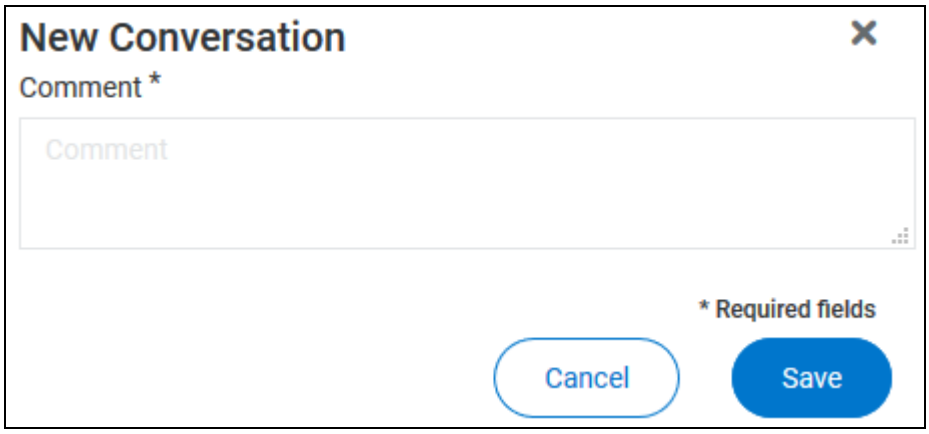
 © 2019 RealPage, Inc.

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.

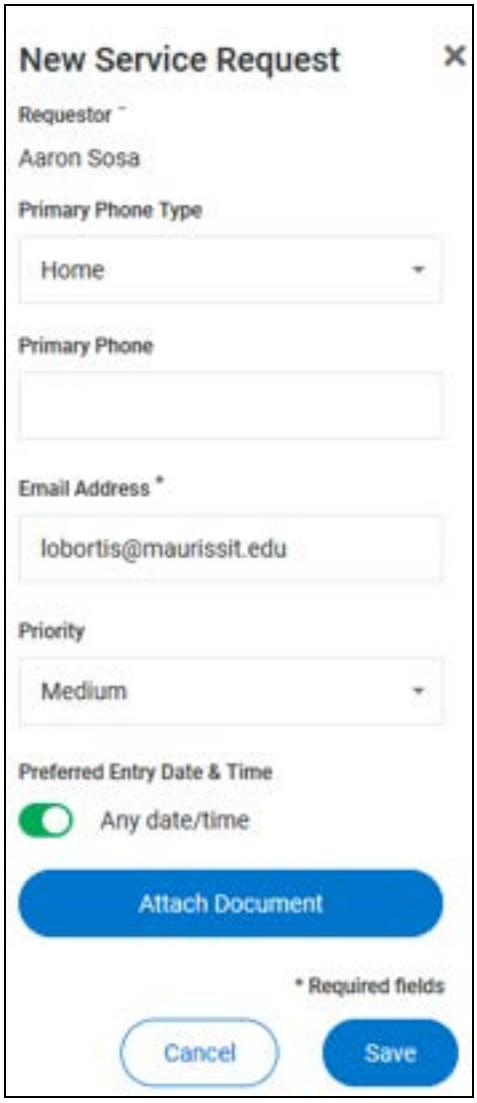
   Your name and lease information are included with the message, and, if you started the new conversation from the **Service Request Details** page, the conversation is associated with the service request and the service request number is included in the message that the property management company receives.

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.

 © 2019 RealPage, Inc.

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.

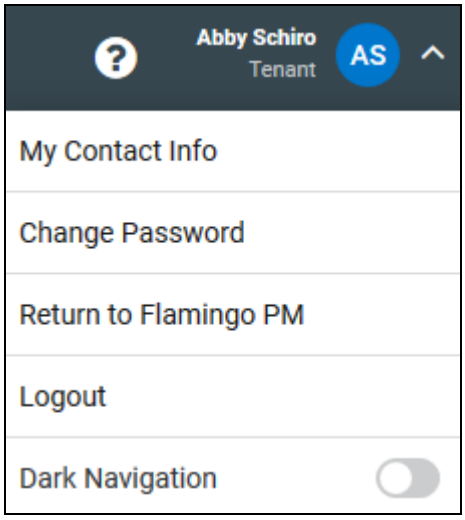
CHAPTER 7

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 111).
- Change your password. (on page 111)
- Return to your property manager's website. (on page 112)
- Log out of the Tenant Portal. (on page 112)
- Switch to the **Dark Navigation** view. (on page 112)



In This Chapter

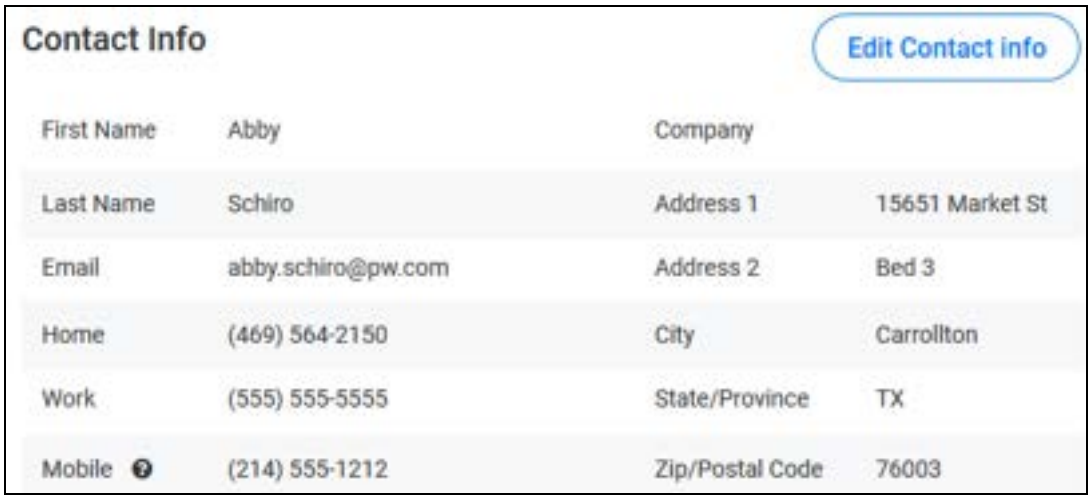
Viewing or Editing My Contact Info 111
Changing Your Tenant Portal Password 111
Using Return to 112
Logging Out of the Tenant Portal 112
Switching to Dark Navigation 112

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.

 © 2019 RealPage, Inc.

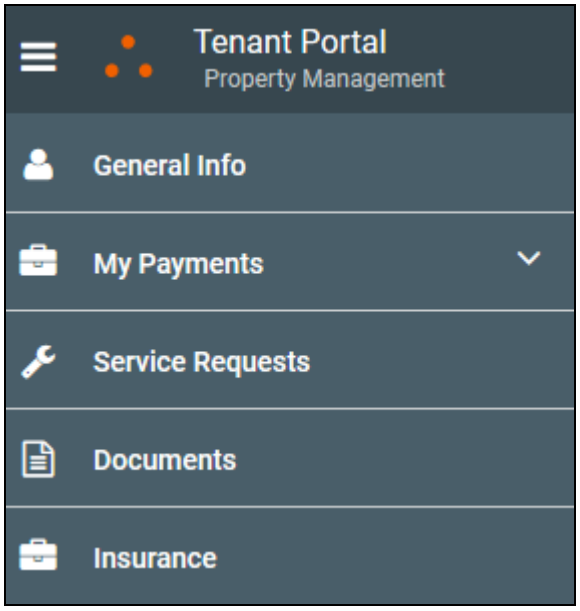
Switching to Dark Navigation

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**.