



Owner Portal Guide

The Owner Portal is a special area of HomeRiver Group's web site that is designed to provide you with real-time information regarding your rental properties. The Owner Portal allows you to:

- View your statements and reports online.
- Communicate with the management team.
 - View alerts for unpaid bills.
 - Approve or reject work orders.
 - Update contact information.
- Add a payment profile for electronic debits and credits.

Activating Your Portal

Step

To activate your portal, first, receive the activation email in your Inbox. Click on Link Provided in message below your Email Address.

Action/Page

Re: Owner Portal Access Owner Notification

Dear Adrian,

This notification is to inform you that your Owner Portal password has been created or reset. If you changed your password from the portal, there will not be a link below. Otherwise, you will be able to update your password by following the link below:

Email Address:
Link: <https://app.propertyware.com/pw/portals/flamingopm/updateOwnerPassword.action?id=1398898715&secure=k3myT03Aldbbaaf1p68ifU2U52BUYIU76d9pRoZpZCM%3D>

This link will expire in 48 hours

The Owner Portal provides you the opportunity to communicate with your property manager and view account information. To access your Owner Portal, click the link provided below:
[Portal Login](#)

This will open a browser for you to enter in a password and re-enter the password.

ID#

Update Password

Submit a new password

New Password

Confirm Password

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

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Now, click back to Login.

ID#

Password Successfully Updated

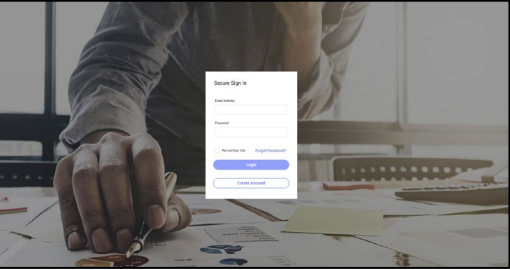
[Go to Login Page](#)

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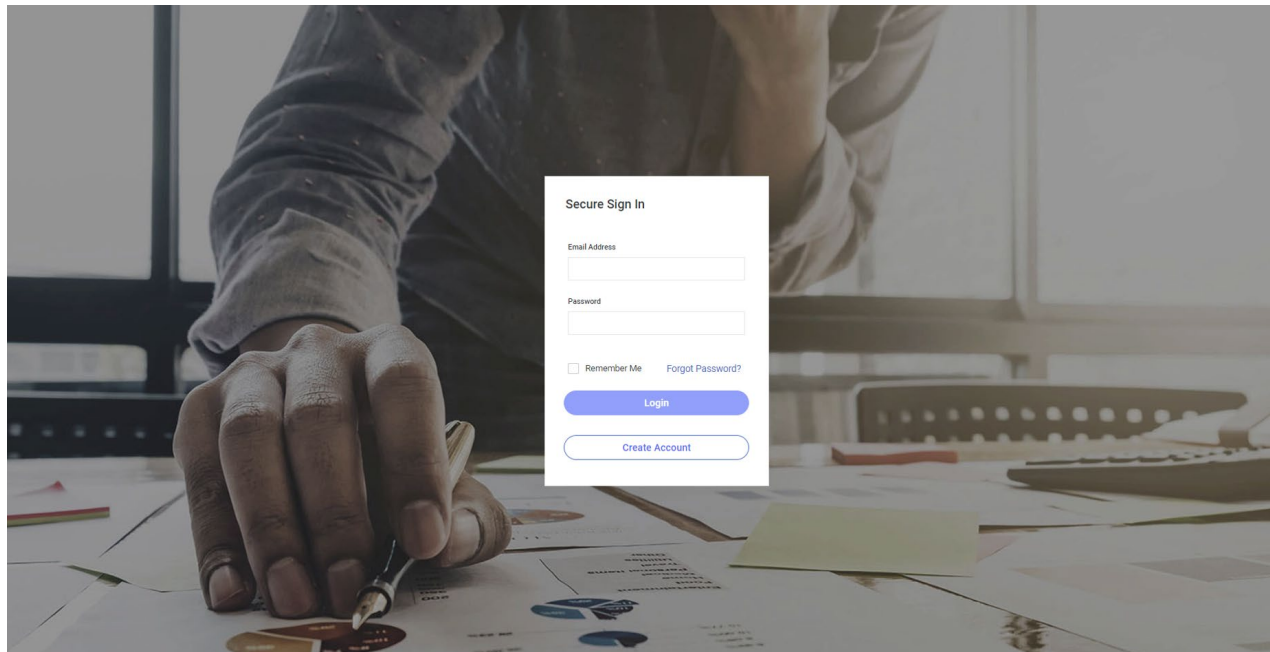
Enter in login username and password just created and click Sign In.



Signing on to the Portal

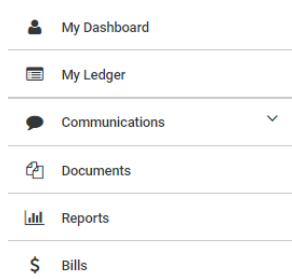
You must have an email address to have an account to your owner portal. Your property manager uses this address to set up your account and sends you an email message with sign-on instructions to your portal. In most cases, your email address is the username.

1. Enter your email address in the Email Address field.
2. Enter the password provided in the email message you received.
3. Click the Sign In button.



If you lose or forget your password, click the [Forgot Your Password?](#) link to request a new password. You need to provide your first and last names and email address. Enter the same email address that your property manager has on file for you.

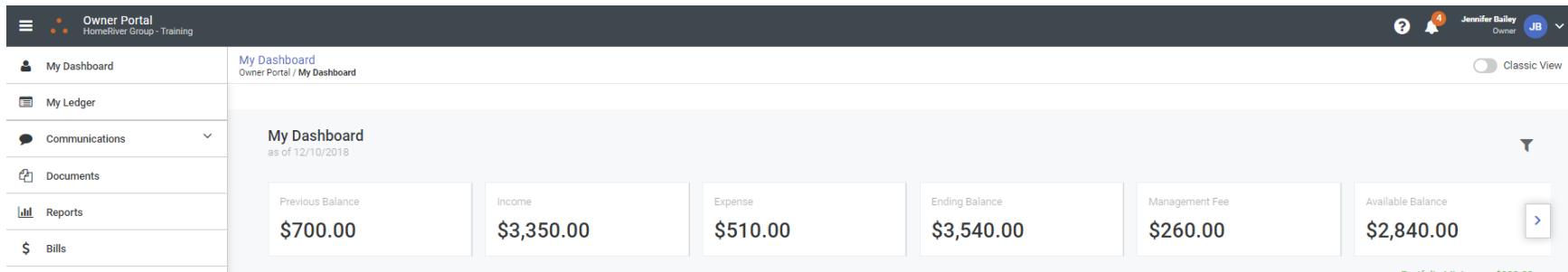
Owner Portal Navigation Tabs



The Owner Portal has navigation tabs on the left. Click a tab to select it. The following tabs are available for viewing: My Dashboard, My Ledger, Communications, Documents, Reports, and Bills.

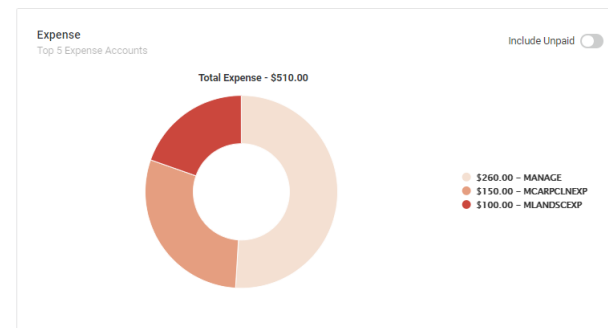
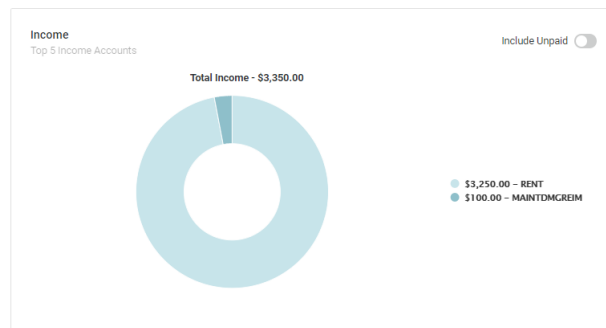
My Dashboard

Upon logging in, the My Dashboard page will be your landing page. Use the My Dashboard page to view financial information and KPI's related to your properties as of today's date. At the top you will see your Previous Balance, Income, Expense, Ending Balance, any Management Fees collected, and your Available Balance.



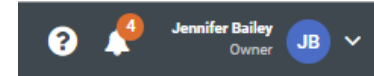
You can also view more detailed information related to the Income and Expenses, with the option to filter to include anything currently unpaid. These financials can be adjusted to the time frame of your preference, but it will default to "This Month".

Bailey-Elsaadi



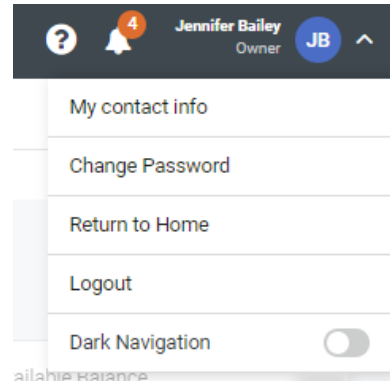
My Alerts

The My Alerts section shows links to unpaid bills and work orders waiting for your approval. Click a number link to go directly to the Bills or Maintenance pages, where you can view, approve, or reject the items. If there are no alerts, the *My Alerts* section displays "No Unpaid Bills" and "No Work Orders Pending Approval."



My Contact Information

The My Contact Information section displays your contact information. There are two links that allow you to manage your account information: Edit and Change Email/Password.



Making a Contribution

Making an owner contribution is simple from the My Dashboard tab. If you do not already have your payment account information in the system, you will find a button to Add Payment Info.

A screenshot of the 'My Dashboard' interface. At the top left, it says 'My Dashboard' and '01/01/2018-01/01/2019'. Below this is a summary table with six columns: Previous Balance (\$30.00), Income (\$29,570.00), Expense (\$10,130.00), Ending Balance (\$3,729.00), Management Fee (\$6,700.00), and Available Balance (\$3,009.00). At the bottom right, there is a note 'Portfolio Minimum - \$500.00' and a blue button labeled 'Add Payment Account'. The name 'Aaron Hardy' is visible at the bottom left of the dashboard area.

| Previous Balance | Income | Expense | Ending Balance | Management Fee | Available Balance |
|------------------|-------------|-------------|----------------|----------------|-------------------|
| \$30.00 | \$29,570.00 | \$10,130.00 | \$3,729.00 | \$6,700.00 | \$3,009.00 |

If you already have this information logged, this button will instead read “New Contribution”.

The screenshot shows a user interface for a "My Dashboard" page. At the top left, it says "My Dashboard" and "Owner Portal / My Dashboard". At the top right, there is a "Classic View" toggle. The main content area is titled "My Dashboard" with a date range of "12/01/2018-01/01/2019". Below this, there are six summary cards: "Previous Balance" (\$2,986.50), "Income" (\$14,422.58), "Expense" (\$2,357.96), "Ending Balance" (\$15,051.12), "Management Fee" (\$1,341.94), and "Available Balance" (\$14,523.62). A "Portfolio Minimum - \$500.00" note is at the bottom right of the summary area. Below the summary area, the name "Aaron Hardy" is displayed on the left, and a "New Contribution" button is on the right.

| Metric | Value |
|-------------------|-------------|
| Previous Balance | \$2,986.50 |
| Income | \$14,422.58 |
| Expense | \$2,357.96 |
| Ending Balance | \$15,051.12 |
| Management Fee | \$1,341.94 |
| Available Balance | \$14,523.62 |

Additionally on this page, you will find additional icons located the top. The question icon will open the Owner Portal information help guide provided. The bell icon indicates any alerts available to you. To adjust your contact information or to change your portal password, select the down arrow next to your name.

The screenshot shows a user profile navigation bar. It includes a question mark icon, a bell icon with a red notification badge containing the number "4", the name "Jennifer Bailey" with the role "Owner" below it, a blue circular profile picture with the initials "JB", and a downward-pointing chevron icon.

My Ledger

The next tab available is My Ledger. The ledger will display the summary header of financial information at the top. Again, you can filter for a different time frame at the top with the Filter icon.

My Ledger

12/01/2018-01/01/2019



Income

\$3,350.00

Expense

\$510.00

Ending Balance

\$3,540.00

Management Fee

\$260.00



For more detail on the Summary header items, view the line item information below.

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| Date | Ref # | Location | Payee | Description | Details | Amount | Account Balance |
|------------|--------|--|-------------------------------|-------------|---|------------|-----------------|
| 12/10/2018 | Check | BAILEY-ELSAA-9903BELTLINE- | HomeRiver Group Holdings, LLC | Bill | Management Fee Expense- | -\$260.00 | \$3,540.00 |
| 12/10/2018 | 423424 | BAILEY-ELSAA-9903BELTLINE-9903BELTLINE | Fuller - Fuller | Charge | Maintenance/Dmg Reimbursement - Landscaping | \$100.00 | \$3,800.00 |
| 12/10/2018 | Check | BAILEY-ELSAA-9903BELTLINE- | Joe's Plumbing | Bill | Maintenance - Carpet Cleaning- BILL COMMENTS | -\$150.00 | \$3,700.00 |
| 12/10/2018 | Check | BAILEY-ELSAA-9903BELTLINE- | Landon's Landscaping | Bill | Maintenance - Lawn/Landscaping-test | -\$100.00 | \$3,850.00 |
| 12/10/2018 | 23123 | BAILEY-ELSAA-9903BELTLINE-9903BELTLINE | Fuller - Fuller | Charge | Rent - | \$3,250.00 | \$3,950.00 |

To export this ledger into Excel, click the download icon. This will provide you with data you can further manipulate outside of the portal.



Communications

The Communications tab allows you to communicate 24/7 with your Property Management team.

The first page to access is the Community Message board. This will display a message posted to all owner portals by HomeRiver Group. Additionally, the alerts tab will display all alerts sent to your owner portal. The page will also display by clicking the alert icon in the upper right hand corner. To start a conversation with your management team, simply click the conversation page. Here, you will click New in the upper right hand corner. Type your comment in the comment box and select save. This will automatically send to your HomeRiver Group team for attention. If a conversation is posted back in reply or originally created from them, you will see them log here.

Conversations

No Conversations found

Documents

Next, is the Documents tab – which is divided into two sections. At the top, you can view financial *Statements* for any portfolio and period you want. You can download the published statements or view the bills associated with the statement.

Statements



| <input type="checkbox"/> Portfolio | Statement Period | Download PDF | View Bills |
|--|-------------------------|--------------|------------|
| <input type="checkbox"/> Owner_Statement_(11/01/2018_-_11/30/2018).pdf | 11/01/2018 - 11/30/2018 | | |
| <input type="checkbox"/> Owner_Statement_(10/01/2018_-_10/31/2018).pdf | 10/01/2018 - 10/31/2018 | | |
| <input type="checkbox"/> Owner_Statement_(10/01/2018_-_10/31/2018).pdf | 10/01/2018 - 10/31/2018 | | |
| <input type="checkbox"/> Owner_Statement_(10/01/2018_-_10/31/2018).pdf | 10/01/2018 - 10/31/2018 | | |
| <input type="checkbox"/> Owner_Statement_(09/01/2018_-_09/30/2018).pdf | 09/01/2018 - 09/30/2018 | | |

Below that, you'll see any Documents published to your portal from HomeRiver group. These can be downloaded by clicking on the document and selecting Download.

Other Documents

| <input type="checkbox"/> File Name | Document Type | Size | Uploaded |
|---|---------------|-------|-----------|
| <input type="checkbox"/> Owner Portal Guide.pdf | Other | 7113k | 9/20/2018 |

Reading your Owner Statement

| HomeRiver Group - Training 251 Little Falls Dr Wilmington, DE 19808 | |  | | | | |
|--|--|---|---|------------|------------|-------------------|
| Jennifer Bailey 1232 Lakeview Pkwy Richardson, TX 75044 | | OWNER STATEMENT Report Period: 12/01/2018 - 12/31/2018 | | | | |
| Managed Properties: BAILEY-ELSA | 7846 S Power line, Nampa ID 83686-9483 | 9903 Beltline Rd, Richardson TX 77056 | | | | |
| Date | Ref# | Description | Details | Income | Expense | Balance |
| 12/01/2018 | | Beginning Balance | | | | \$700.00 |
| 12/10/2018 | 561 | Income: Late Fee (Manual) | 7846 S Power line / Jones, S_2 | \$50.00 | \$0.00 | \$750.00 |
| 12/10/2018 | 23123 | Income: Rent | 9903 Beltline Rd / Fuller - Fuller | \$3,250.00 | \$0.00 | \$4,000.00 |
| 12/10/2018 | 23123 | Income: Late Fee | 9903 Beltline Rd / Fuller - Fuller | \$100.00 | \$0.00 | \$4,100.00 |
| 12/10/2018 | 423424 | Income: Maintenance/Dmg Reimbursement | 9903 Beltline Rd / Fuller - Fuller | \$100.00 | \$0.00 | \$4,200.00 |
| 12/10/2018 | REF | Maintenance - Carpet Cleaning | 9903 Beltline Rd / Joe's Plumbing/BILL COMMENTS | \$0.00 | \$150.00 | \$4,050.00 |
| 12/10/2018 | | Maintenance - Lawn/Landscaping | 9903 Beltline Rd / Landon's Landscaping/test | \$0.00 | \$100.00 | \$3,950.00 |
| 12/10/2018 | | Management Fee Expense | 9903 Beltline Rd / 8.0% of \$3,250.00 RENT = \$260.00 | \$0.00 | \$260.00 | \$3,690.00 |
| 12/31/2018 | | Ending Balance | | | | \$3,690.00 |
| 12/31/2018 | | Portfolio Minimum | | | (\$300.00) | \$3,390.00 |
| 12/31/2018 | | Unpaid Bills | | | (\$400.00) | |
| 12/31/2018 | | Due to Owner | | | | \$2,990.00 |

Once the window opens with your Owner Statement, at the top, view your Portfolio information and the Report Period.

Next, if there are any additional comments made on the statement, you will see them below your information.

The statement will breakdown the accounting giving you a granular look into the income and expenses individually.

At the top, you will see a line for the Beginning Balance. You might have a Beginning Balance if there is a reserve held in your portfolios.

The transactions will be grouped in date order.

If you have any further questions regarding your statement, please feel free to contact US.

Reports

Use the Reports tab to view all reports regarding the management of your rental properties. All published reports use real-time data.

Viewing Reports

1. To view a report, locate the report in the list of reports.
2. Click the View icon

Reports

Expand All

Rent Roll with Unit Information
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A list of all vacant and occupied units with lease information, when applicable. This rent roll provides target rent as well as other options for additional data and more custom filtering capabilities than the standard Rent Roll.

View 

Here is an example of a published report:

Leases

A list of all Active Leases

| Avg. Balance | Avg. Monthly Rent | Avg. Prepayments | Avg. Total Unpaid | Unique Lease Name(s) | | | | |
|---------------|-------------------|------------------|-------------------|----------------------|--------------|--------------|---------|--------------|
| \$0.00 | \$1,166.67 | \$0.00 | \$0.00 | 3 | | | | |
| Lease Name | Status | Start Date | End Date | Move-In Date | Monthly Rent | Deposit Held | Balance | Total Unpaid |
| Fisher, H. | Active | 01/15/2015 | 01/31/2017 | 01/15/2015 | \$900.00 | \$900.00 | \$0.00 | \$0.00 |
| Mejia, R. | Active | 01/07/2015 | 01/31/2017 | 01/07/2015 | \$1,700.00 | \$1,700.00 | \$0.00 | \$0.00 |
| Thompson, A. | Active | 01/01/2015 | 12/31/2016 | 01/01/2015 | \$900.00 | \$900.00 | \$0.00 | \$0.00 |

Bills

Use the Bills page to review all bills and payments that have been recorded for the client's rental properties. These bills include a breakdown of the expense line items, descriptions, and invoices from vendors.

Bills



| Bill# | Bill Date | Building | Unit | Status | Due Date | Payment Date | Amount | Amount Paid | Action |
|-------|------------|------------------|------|--------|------------|--------------|----------|-------------|--------|
| 79 | 12/10/2018 | 9903 Beltline Rd | | Paid | 12/10/2018 | 12/10/2018 | \$260.00 | \$260.00 | |
| 73 | 12/01/2018 | 9903 Beltline Rd | | Unpaid | 12/15/2018 | | \$150.00 | \$0.00 | |
| 75 | 12/01/2018 | 9903 Beltline Rd | | Paid | 12/01/2018 | 12/10/2018 | \$100.00 | \$100.00 | |

To view a bill further, click on the action icon to the right hand side to select View Detail. You additionally can click to Generate Invoice and View the Invoice.