

Using the Owner Portal

The owner portal allows you easy access to some of your property information, and it also offers you a direct line of communication to your property management company (PMC). You can view your property's availability on a calendar, get an overview of your property's performance, send messages directly to your PMC, and view any message history.

Log in to the Owner Portal for the First Time

Complete the following steps to log in to the owner portal:

1. Contact your PMC, and then ask them to provide you access to the owner portal. They send you an invitation welcome email.
2. In the welcome email, click the registration link to display the **Owner Portal Reset Password** page.
3. Enter a new **password**. The password must be at least eight characters long and contain at least one of each of the followings: uppercase letter, lowercase letter, and number.
4. Enter your password again in **Re-enter Password**.
5. Click Submit to update your password and log in to the owner portal.

Reset Your Password

If you forget your password to the owner portal, or if you are logging on from a different computer that does not have access to your password, you can reset your password yourself. Complete the following steps to reset your owner portal password:

1. Display your owner portal log in page.
2. Click **Forgot Password** under the login section to display the **Owner Portal Forgot Password** page.
3. Enter your email address in **Email**.
4. Click **SUBMIT** to send the password reset email to your email address.
5. Open your email to locate the password reset email, and then click the forgot password link to display the **Owner Portal Reset Password** page.
6. Enter a new **password**. The password must be at least eight characters long and contain at least one of each of the following: uppercase letter, lowercase letter, and number.
7. Enter your password again in **Re-enter Password**.
8. Click **Submit** to update your password and log in to the owner portal.

Owners with Multiple Properties

You can access all of the properties tied to your owner record in the property management software, so most owners should only need one login for the owner portal. However if you have multiple properties, and you are configured as a separate, individual owner record for each of those properties, you are required to have separate logins for the owner portal. Each login must have a unique email address. They cannot all use the same email address. If you want to view your multiple properties in the owner portal with one login, then you must contact your property management company to consolidate to only have one owner record.

An example of an owner having separate owner records for each of their properties is so that they can get separate 1099s and owner statements.

Navigating the Owner Portal

The current property's name is displayed near the top left of the owner portal. If you own multiple properties, the property name is a pull-down menu, and you can use this to select a different property.

The owner portal has six sections listed on the left side of the owner portal: dashboard, messages, Calendar, performance, listing settings, and owner settings.

Dashboard

This is page displayed when you log in. It contains an overview of key metrics for the selected property. There are three different sections on the dashboard:

- **January to Previous Month** - The date range for this section starts at the beginning of the year and ends at the most recent owner statement you received. It displays the total owner net reservation revenue amount, the total owner net reservation revenue amount for the same date range the previous year, and the total number of bookings for the current year's date range.

For example, if you are viewing this page on June 15th and revenue has only been processed for May, on this date in both 2016 and 2017 respectively, then the date range for both years is January through May.

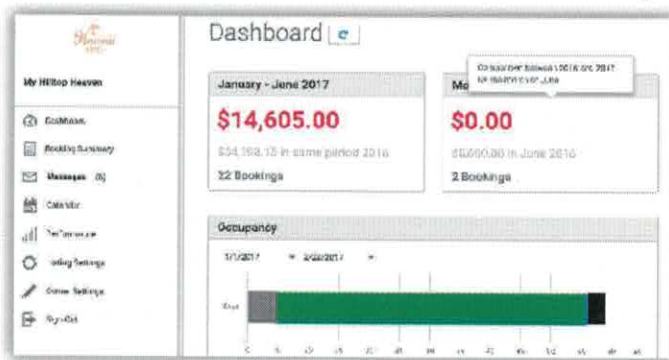
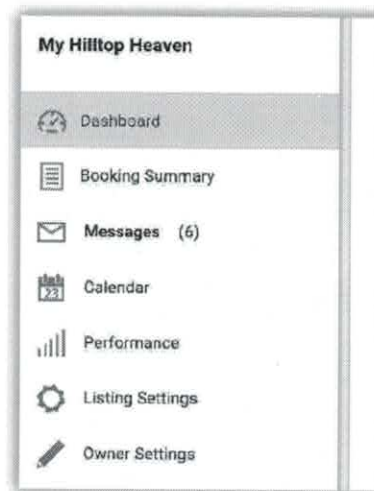
- **Month of** - This sections displays the total booking amount for the current month, the total booking amount for the same month the previous year, and the total number of bookings for the current month.

Booking Summary

This is a detailed summary showing information about your past and future bookings so you can gauge the performance of your property.

Select a date range from the date pull-down menus at the top to display all reservations that started and ended within the selected date range. Each reservation displays the following information:

- **From** - The start date of the reservation.
- **To** - The end date of the reservation.
- **Nights** - The total number of nights for the reservation.
- **Guests** - The total number of guests on the reservation.
- **Rent** - The gross booking total for the reservation. Since this is the gross, the rental income on your owner statement is less than this amount.



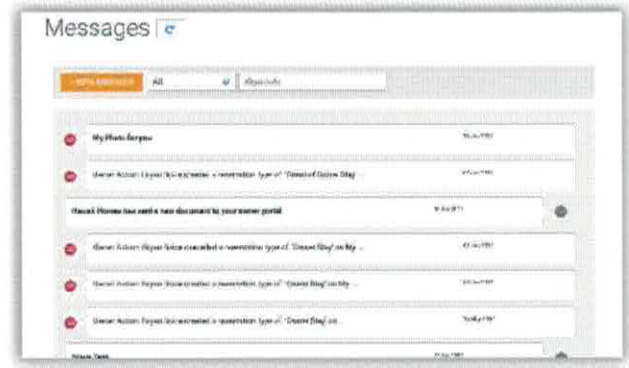
- **Occupancy** - This section displays the occupancy percentages for a selected date range. It includes the percentage that the property was not occupied, the percentage that the property was occupied, and the percentage that the property unavailable. The range defaults to the previous 60 days, however you can manually select a different date range. You can also hover your mouse over the different percentage bars to display the number of days within the date range the property was not occupied, occupied, and unavailable.

Messages

This page displays any messages and any replies to messages that have been sent between you and your property management company (PMC). The conversations are minimized by default, and you can click on any conversation to expand the entire thread.

To quickly find a specific message, you can use the **Keyword** search. The search results are displayed in real-time. You can also filter the messages. The filter pull-down menu has three options:

- **All** - Displays all messages.
- **General** - Displays only messages sent between you and your PMC.
- **Statements** - Displays only owner statements. The statements are stored as PDFs. If you expand an owner statement message, you can click **OWNER** to download and display the PDF owner statement.



Send a Message

You can also send new messages to your PMC. Complete the following steps to send a message:

1. Click **New Message** to display the **New Message** dialog box.
2. Click **Attach File** to attach and files to your message.
3. Select which property the message is referring to from the **In reference to** pull-down menu. If you only have one property, this menu is grayed out.
4. Enter the **Subject** of the message.
5. Enter the **Body** of the message. You can format the body of the message using the available formatting tools.
6. Click **Send** to send the message.

Calendar

The calendar displays your property's availability in a monthly or yearly calendar view. Any current reservations for the property are displayed as a pink line over the reservation's dates. It also displays the number of nights and the number of guests for each reservation. Clicking on a reservation displays more details about the reservation and further options.

Create Owner Reservations

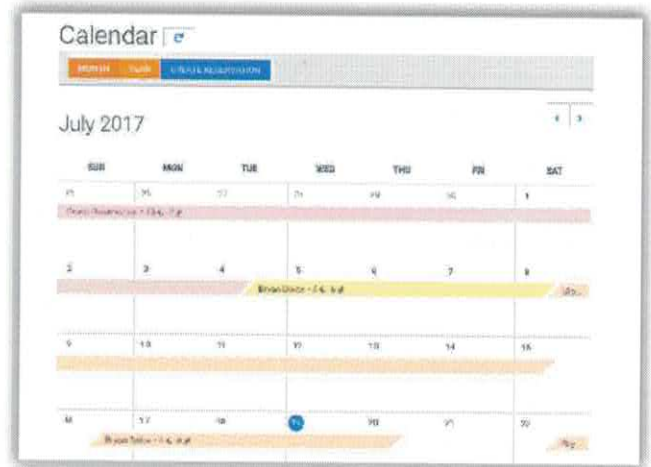
You can create owner reservations yourself from the calendar. Complete the following steps to create an owner reservation:

1. Click **Create Reservation** to display the **Add Reservation** page.
2. Select **Check In** date and **Check Out** date.
3. Select the **Stay Type**. The options are owner and guest of owner.
4. Select the number of adults staying in **No of Adults**.
5. Select the number of children staying in **No of Children**.
6. Select if you **Will take care of housekeeping**. This indicates to the property manager they are responsible for cleaning the property after departure.
7. Enter any **Reservation Notes**.
8. Click **Save Reservation**. It can take up to 60 seconds for a new reservation to appear on the calendar.

Edit and Cancel Reservations

You can edit or cancel any reservation on the calendar. Click on any reservation to display the reservation's dialog box. You have three options:

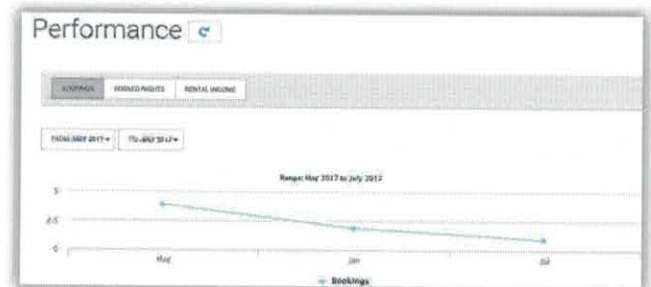
- **Cancel Reservation** - This cancels the reservation.
- **Edit Reservation** - This displays the **Edit Reservation** page. You can make any needed edits, and then click **Save Reservation** to save those changes.
- **OK** - This closes the dialog box and returns you to the **Calendar** page.



Performance

Performance goes into more detail than the high-level summary found on the main **Dashboard** page.

At the top of the **Performance** page, you can select a date range, and then select one of three different data options: **Bookings**, **Booked Nights**, and **Rental Income**. You can place your mouse pointer over the chart to find specific amounts for the date range. Rental income only displays processed revenue. It does not include future bookings, so bookings beyond the current date show as \$0.



At the bottom of the **Performance** page, there are the **Potential Revenue** and **Reservation Source** sections. You change the year for the information displayed. You can place your mouse pointer over the different sections of each graph to get more specific details, such as number of days and dollar amounts for the **Potential Revenue** graph and the rental income amount and the percentage of the total for that source for the **Reservation Source** graph. In the **Reservation Source** section, the middle of the graph displays the total rental income for the selected year as of the current date.



The potential revenue graph displays the following information:

- **Available** - This displays the number of days the property was available, meaning there were no reservations for these days. This is colored gray.
- **Maintenance** - This displays the number of days the property was unavailable for any reservations due to maintenance closures. This is colored orange.
- **Owner Reserved** - This displays the potential revenue for the property, meaning the amount of revenue not collected due to owner or guest of the owner reservations blocking guests from booking reservations. This is colored black.
- **Guest Reserved** - This is the actual revenue for the property created by guest reservations. This is colored green.

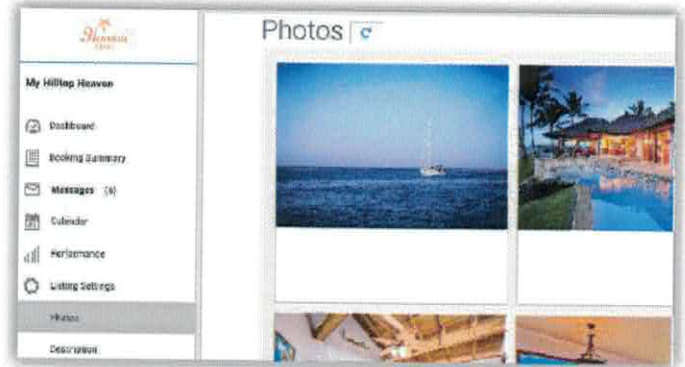
The reservation source graph displays the breakdown of where your reservations are being made.

Listing Settings

This displays the photos and descriptions of your property that are entered in your PMC's property management software. There are two listing settings pages:

- **Photos** - This displays any images and the image descriptions for your property.
- **Description** - This displays the main or over-view description for your property.

You cannot make any changes to this information from the owner portal. The PMC must make any changes from within their property management software.



Owner Settings

This displays the user name you use to log into the owner portal, which is your email address. You cannot change your user name from inside the owner portal.

You can also choose if you want to receive a notification email whenever you receive a new message from your PMC in the owner portal. This can be a helpful reminder to you to help you provide quicker responses to any messages.