HEROPM
Property Management Online

Xplain: Setting Up Owners Online

With HEROPM, your owners, tenants, and vendors can have online accounts that allow them to log on and see information you post for them, through your Control Panel and from PROMAS. Setting up client logon accounts is simple, and can be done a number of ways. This document explains one way.

Before beginning, you should be sure you have either manually added owners, or published from PROMAS Central.

1 Step 1: Property Manager's Configuration

RP Preferences
Set preferences used in RP systems:

Configure Common Options
From your Control Panel, choose the Configuration tab. Most configuration options are under RP/VR Preferences *(RP for owners of annual properties, VR for owners of vacation rentals)*

Letter Template: Owner Custom Letters

Create Invitation Letter Template
- Select Letter Template: Owner Custom Letters.
- From Choose Template:, select New Template.
- Name the template "Invitation to create online account"
- At the bottom left, click the View/Apply Default Template link, the in the popup window, click Apply Template.
- Edit the template as you see fit, then click Save Template.

You now have a defined letter template that we will use later on.

Default Profile Authorizations

Set Default Authorizations
- Select Default Profile Authorizations.
- Check the boxes that you wish to allow for new owners.
- Save the authorizations.

These will automatically be applied to all new owners as they are added. To apply these settings to existing owners, be sure to click the checkbox

Owner Logon Intro

Create an Intro Message for Owners
- Select Owner Logon Intro.
- Enter instructions for your owners on how to use the system, updates for your owners, or anything else you want them to know.

This displays when an owner logs on.

Owner Statement Notification

Set Statement Notification Message
- Select Owner Statement Notification
- Enter the information you want owners to receive if they elect notification on uploaded **statements**.

This should include a link to their account logon page.

Owner Document Notification

Set Document Notification Message
- Select Owner Document Notification
- Enter the information you want owners to receive if they elect notification on uploaded **documents**.

This should include a link to their account logon page.

To Step 2: Introductions to Owners

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Step 2: Introductions to Owners

Add a Document
Add a document or letter for an owner

Invite Owners to Create an Account

From your Control Panel, choose the RP/VR Management tab. Select Owners - Add a Document.
(RP for owners of annual properties, VR for owners of vacation rentals)

Create an Invitation Letter

- Select a profile from the Assigned To box, either by typing or using the drop-down.
- Click the Create Notice/Letter button from the top right corner.
- From the drop down at the bottom right, select the template "Invitation to create online account"
- Customize the letter if you wish. Ensure that the owner's information is properly merged *(if it is not, you will need to edit the profile manually or update PROMAS and publish again).*
- Save this to the owner's account by clicking Save Notice.

This owner now has a document in his online filing cabinet that he can refer to at any time.

Invite Your Owner

- Click the View/Print or Email icon beside the newly created invitation to print or email it.
- When emailing, ensure that the owner's name and email address are properly entered.

To Owners' Perspective

Owner Lookup
Search your owner list

Verify that Owners are Set Up

- Click the RP/VR Management tab, then select Owners - Owner Lookup, and look up an owner (or all owners).
- Owners who have successfully set up their online account will display a logon screen icon to the right of their name ( ).
- Owners who have not set up their online account, but are authorized to do so, will display an email reminder icon to the right of their name ( ). Click this icon to send the owner a reminder to set up their account, which includes their account set up information.

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This section is the property manager's overview of what their owners need to do. The actual process for owners is documented in the MyRentalHome Users Guide and in the Video Help on the logon page.

3 Owners' Perspective

Each owner will receive either a printed or emailed invitation to sign up for an online account, from their property manager. This invitation will include set up instructions, a link to the website, and the codes they need to verify their account.

Most owners will set up their account by watching the three minute video or simply following the on-screen prompts.

Setting up a logon account, and linking it with a managed account, is a **one-time process** for an owner. After completing this set up, the owner will simply need to log on and click his account to use the system. The logon link will generally be included in your notifications and other messages to the owner.

The process for tenant and vendor signups is similar to the process for owners.

Part 1: Logon Account

The owner will log on to the website using the link in the invitation. This could be:

- Your website
- PROMASCentral.com
- MyRentalHome.com

From there, he will select the Create Account button.

The owner will enter his:

- Desired username (email address)
- Desired password
- Agreement to terms and conditions

An email is sent to the owner with a link to verify the email account is his, is valid, and can receive email from this system.

The owner will click the verification link in the email message, verifying his email account and completing this part of the process.

Part 2: Managed Account

An owner can connect his logon account to as many managed accounts as you provide. Also, multiple logon accounts can connect to the same managed account, as in the case of spouses or partnerships. Once the logon account is verified, the owner will click the Add button to add a managed account to this logon.

Here the owner will enter the information from his Invitation message (or his reminder email):

- Property Manager ID
- Client (owner) ID
- Email address or verification code (the system will accept either)

After entering this information, the owner has successfully connected his logon account with his managed account, and he does not need to do this again.