

User Registration and Initial Login

The first step for a user to gain access to the portal is registering. To register they need to click on the “Register Now” link on the portal’s login page.

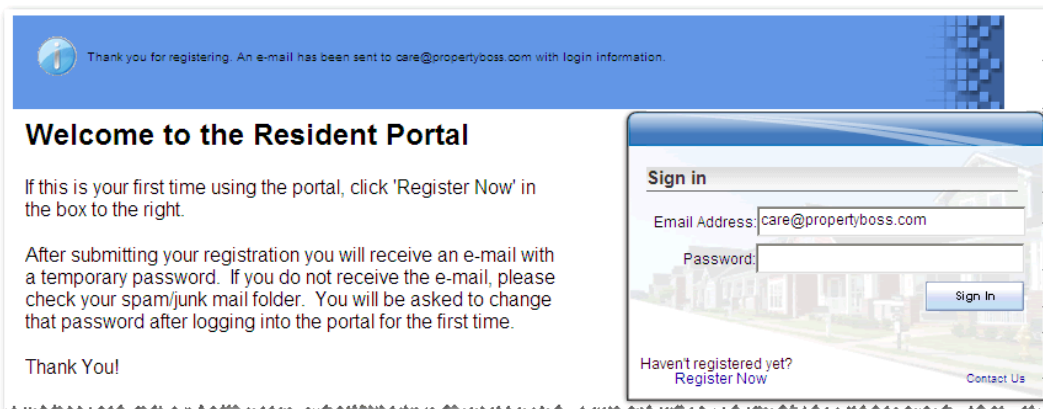
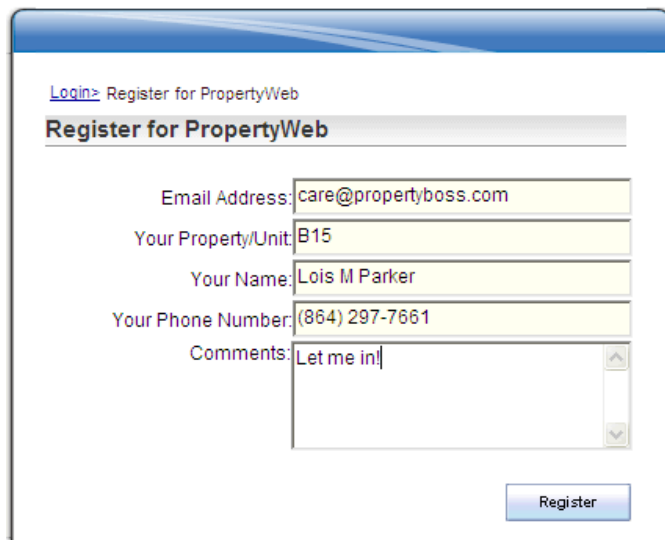
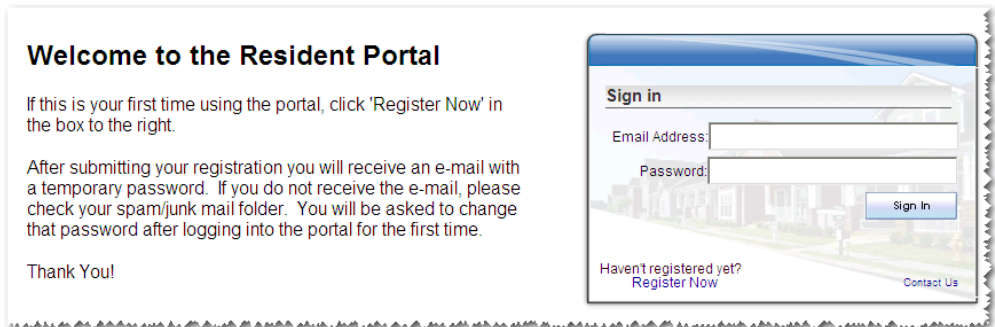
The user will be asked to enter their e-mail address, name, phone number. There’s also a field to enter the Property/Unit if the user is a resident. If the user is an owner the field will be for the company name. They can enter their name, if they’re an individual and not a company. Vendors will enter their company name.

Field Label according to portal:

- Resident/Member - Property/Unit
- Owner – Company Name
- Vendor – Vendor Name

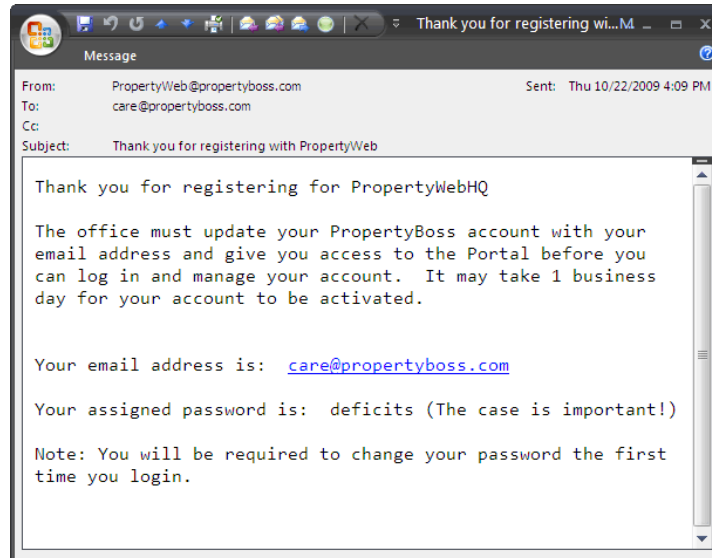
Once they fill in the required fields and hit submit, they will get the following message.

“Thank you for registering. An e-mail has been sent to user@emailaddress.com with login information”



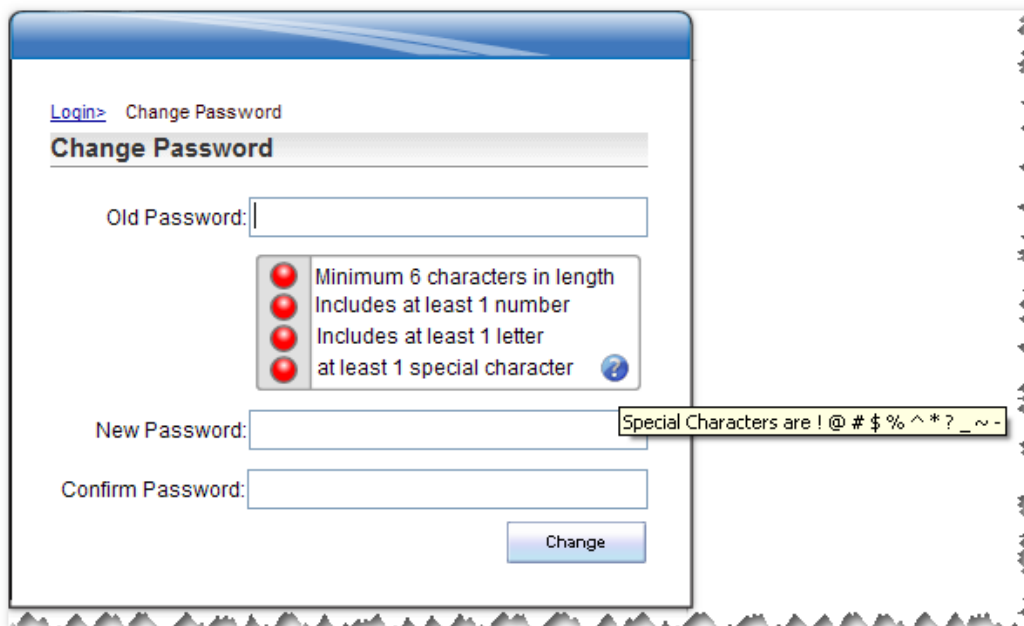
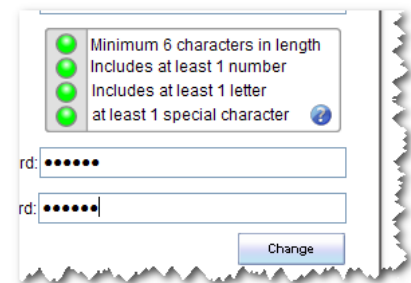
Portal User Registration

The user will receive an e-mail like the one shown below with their temporary password after registration.



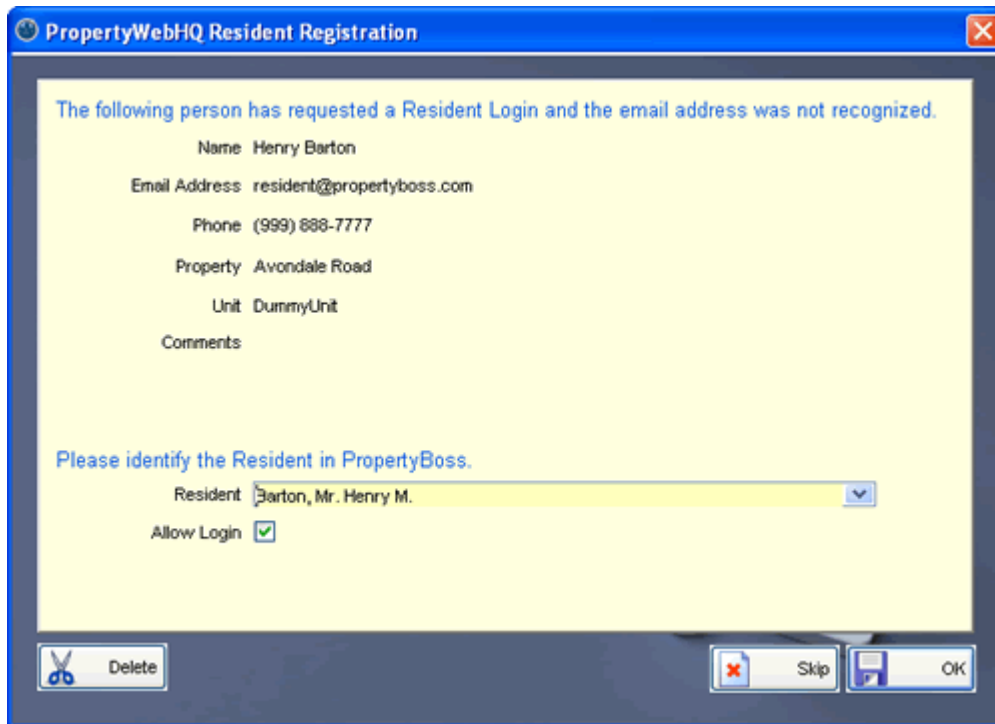
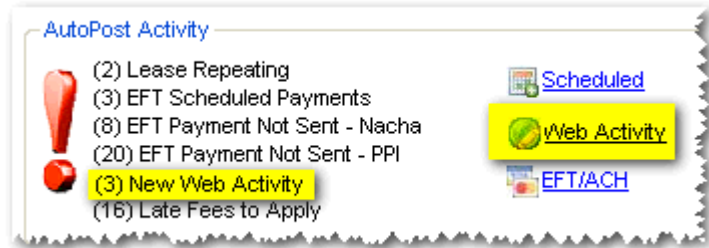
If their e-mail address is already in PropertyBoss they will be able to login immediately. They will be required to change their password.

Hovering over the “?” icon displays the list of acceptable Special Characters as shown below. The reason for the password requirements is added security. As you create the password and it meets each requirement the circle turns green.



Portal User Registration

If their e-mail address is not in PropertyBoss or is different from the one in PropertyBoss, you will receive a Web Activity. When you auto post the Web Activity you will associate their information with the correct user.



The e-mail address will be saved to their notebook and the next time the database synchronizes they will be able to login. If your PropertyBoss is hosted by us the database doesn't require synchronizing. Thus, the user will be able to login within a few minutes.



Troubleshooting

The first place to check when someone is having a problem logging in is the portal. Try logging in with their e-mail address to see what message they're getting. If you don't have their password just go to the next step.

The next place to look is the user's notebook in PropertyBoss. Verify that the e-mail address they say they're using matches exactly to the one you have in PropertyBoss. If they do not match, they will not be able to login.

You can manually enter the e-mail address they want to use to login. You can also check to see if there is a Web Activity from them that hasn't been processed yet.

Are they allowed to login? Turning on PropertyWebHQ adds a checkbox to 'Allow Login to Website'. The box is checked by default. If you don't want a user to be able to login to the portal, uncheck the box.

For Network and Standalone versions of PropertyBoss, you want to make sure your database has synchronized recently. If the user registered and you processed the Web Activity, but the database hasn't synchronized they won't be able to login. The copy of your database that is on our web server is the one that feeds your portals. Thus, it is important to make sure your database synchronizes at least once daily.

Note: You can view all Web Activity that has come into your database by going to Tools and clicking on the Web Activity Merlin button.

Portal Messages

All Portals:

1. ***Registration has not been completed for this email address. Please register.***

They need to register the e-mail address they're trying to login with. If you have multiple portals, make sure they're logging into the correct one. They may be registered in the wrong portal.

2. ***The email address you entered has been registered, but the Office has not permitted access to this account. If you have just registered, it may take 1 business day for your account to be activated.***

The e-mail address they registered was not found in the PropertyBoss database. It is either not there or different than what is in PropertyBoss.

You can manually enter the e-mail address they want to use to login. You can also check to see if there is a Web Activity from them that hasn't been processed yet. Non-hosted clients should check to see if your database has synchronized since they registered.

Resident/Member Portal:

- 1. *The email address you entered has been registered, but is not associated with a lease. You must be on a lease to log in.***

They are registered, but not on any leases. The user can't login as a prospect. They must be a tenant on a lease or contact on an ownership.

- 2. *The email address you entered has been registered, but there are no residents associated with this email address. If you have just registered, please try again later.***

They are registered, but the e-mail address is not on any tenant/contact notebook. The e-mail address they registered was not found in the PropertyBoss database. It is either not there or different than what is in PropertyBoss.

You can manually enter the e-mail address they want to use to login. You can also check to see if there is a Web Activity from them that hasn't been processed yet. Non-hosted clients should check to see if your database has synchronized.

- 3. *The email address you entered has been registered and is valid, but the Office has not permitted access to this account. Please email the Office to request access.***

They are registered and the email address is in a tenant/contact notebook, but the 'Allow Login to Website' box is not checked.

Check PropertyBoss to see if the box is checked then make sure the database has been synchronized.

Owner Portal:

- 1. *The email address you entered has been registered, but there are no owners associated with this email address. If you have just registered, please try again later.***

They are registered, but the email address is not on any owners. The e-mail address they registered was not found in the PropertyBoss database. It is either not there or different than what is in PropertyBoss.

You can manually enter the e-mail address they want to use to login. You can also check to see if there is a Web Activity from them that hasn't been processed yet. Non-hosted clients should check to see if your database has synchronized.

- 2. The email address you entered has been registered, but the Office has not permitted access to this account. If you have just registered, please try again later.***

They are registered, and the email address is on an owner notebook, but the 'Allow Login to Website' box is not checked.

Check PropertyBoss to see if the box is checked then make sure the database has been synchronized.

Vendor Portal:

- 1. The email address you entered has been registered, but the Office has not yet permitted access to this account or it is no longer a valid account.***
- 2. If you have just registered, it may take 1 business day for your account to be activated.***

The e-mail address they registered was not found in the PropertyBoss database. It is either not there or different than what is in PropertyBoss.

You can manually enter the e-mail address they want to use to login. You can also check to see if there is a Web Activity from them that hasn't been processed yet. Non-hosted clients should check to see if your database has synchronized.

Most Common Issues

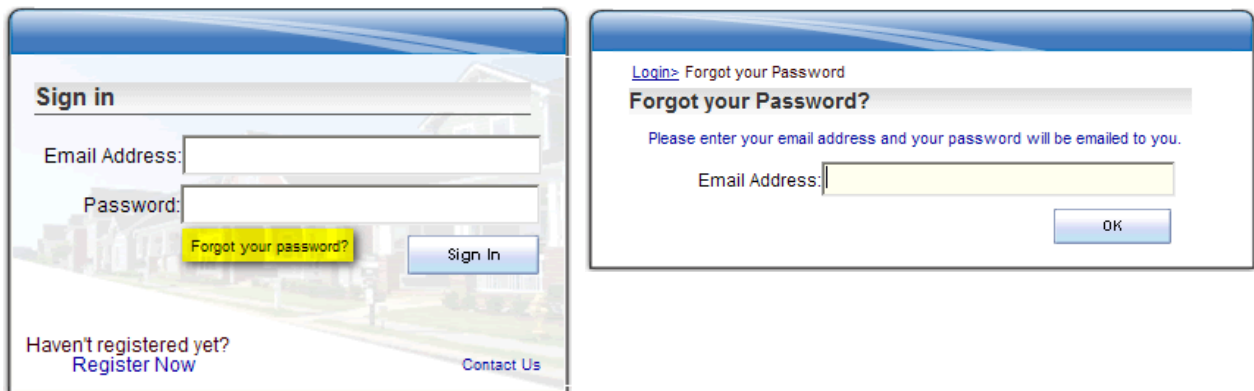
The user says they didn't get the temporary password e-mail. The first place they should check is their junk/spam folder. If you have to contact PropertyBoss, you will need to provide the e-mail address the user is trying to login with and their name. Also

include any error messages the user is getting. Send an e-mail to web@propertyboss.com or submit a helpdesk request at <http://help.propertyboss.com>.

The password was blank in the e-mail. There was no password in the e-mail. Contact PropertyBoss to have a temporary password set. Send an e-mail to web@propertyboss.com or submit a helpdesk request at <http://help.propertyboss.com>.

They can't login because they have exceeded their Logon Failure Count. The account will be locked out if they attempt to login with the incorrect password too many times. The locked out accounts are reset daily.

They have forgotten the password. They can retrieve their password by clicking the 'Forgot your password?' link. They will be sent an e-mail with the current password and will have to change it once they login.



The information displayed in the portal is from a past lease. Their e-mail address is on a notebook associated with a past lease. Usually the case is the user is in PropertyBoss twice. For instance as, John Doe and as John Q. Doe, but both names are referring to the same person. John Doe is on the past lease and John Q. Doe is on the current lease. The e-mail address is on the John Doe (past) notebook but not the John Q. Doe (current) notebook.

Add the e-mail on the John Q. Doe notebook and he will be able to see the information from the current lease. If you haven't removed the e-mail address from the past lease he can choose which lease he wants to view when logging in.

If you have a payment portal, it will not be available in the past lease.

The information in the portal is for a different user. Their e-mail address is associated with the wrong user. Enter the user's e-mail address on the correct notebook.

The portal is not showing the most current information. The user is seeing old or no new information. This is more of an issue with clients that are not hosted. When was the last time your database was synchronized? If it hasn't synchronized recently, do a manual sync and then check your into why the auto-sync isn't working.

The user has registered in the wrong portal. This is the case where an owner has registered as a resident and vice versa. Contact PropertyBoss via e-mail to web@propertyboss.com or submit a helpdesk request at <http://help.propertyboss.com>. Please include the e-mail address the user is trying to login with and their name.

File not found on server next to document/picture link. Quite literally the file isn't on the web server. You need to Resend Media to the Website.