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How to Use the Owner Portal

Welcome to your new Owner Portal - where you can get a quick glimpse of how your rental property is doing



Written by Samuel

Updated over 8 months ago

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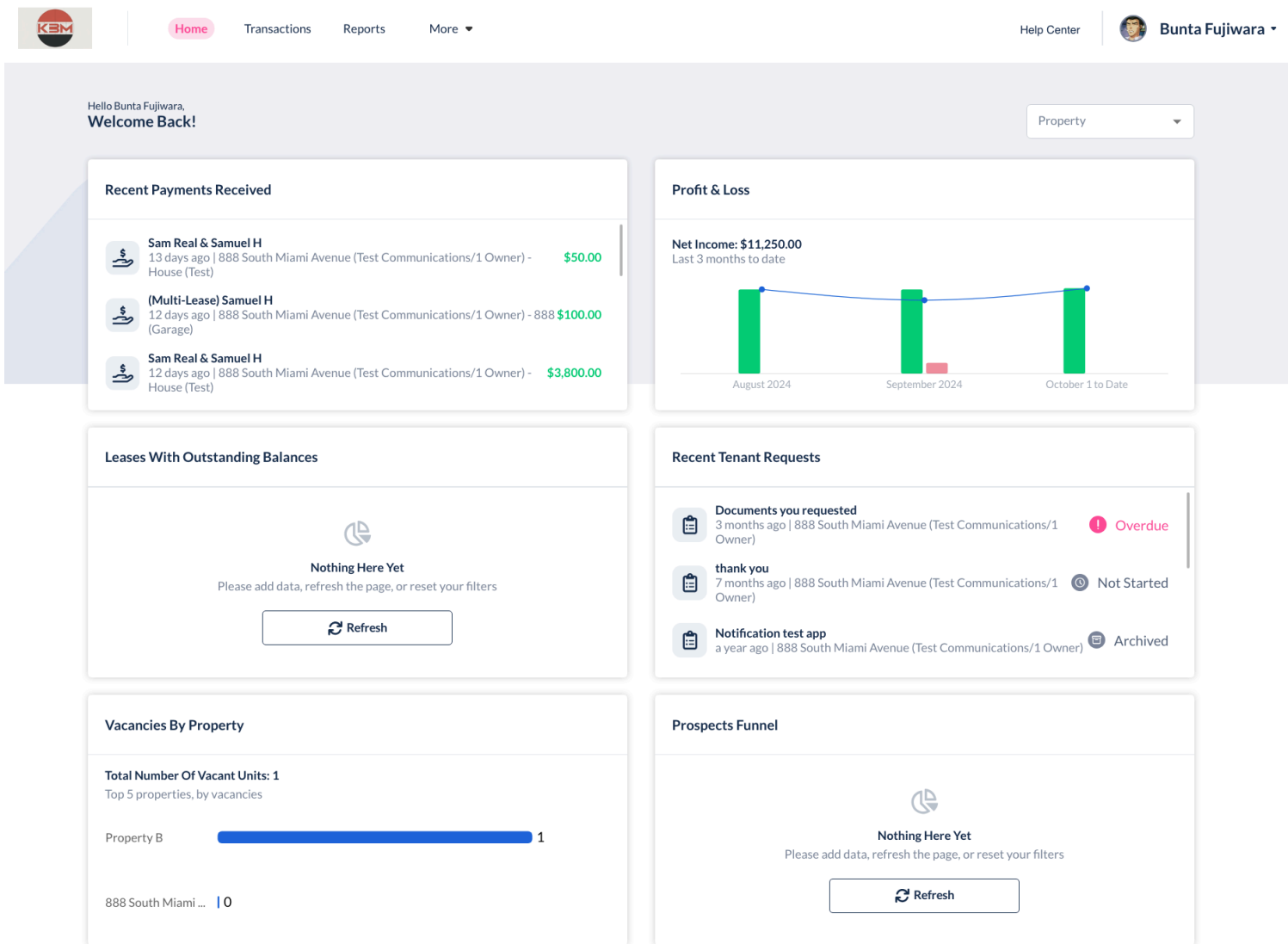


Overview

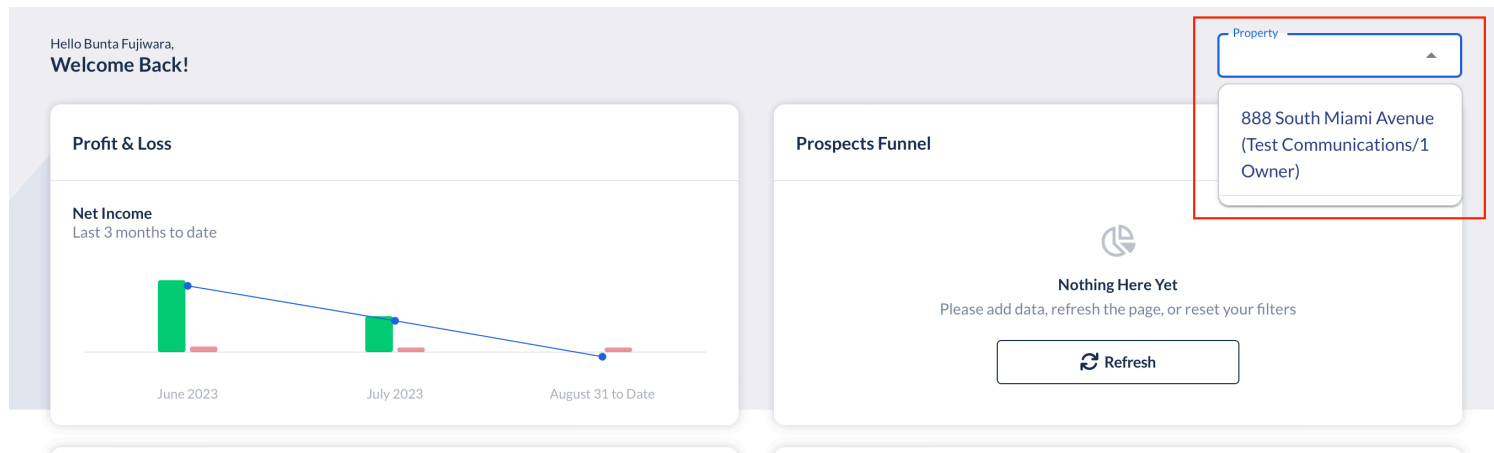
Welcome to your new Owner Portal. If you're viewing this page, that means your property manager has given you access to your **Owner Portal** so you can keep track of your properties and view their day-to-day activities. You'll be able to get a brief overview of your portfolio, view transaction data, view detailed reports, and make owner requests directly to your property manager.

Owner Portal - Overview

The Overview page will provide analytics for your properties. You'll see widgets in there for **Profit and loss**, **Recent Payments Received**, **Vacancies By Property**, **Prospects Funnel**, and **Leases With Outstanding Balances**.



You'll also see a Filter drop-down at the top right that will allow you to filter the information based on Property. This will change all the information in all the widgets to reflect only what is going on in the property you selected.



Note: If you don't see any information in the widgets, that means there is no information to show. Most of the information is dynamic so if there is information to show, it will show on the widgets automatically.

Owner Portal - Transactions



Transactions

View the history of your total contribution and distribution transactions here.

Period

Last 90 days ▾

Property ▾

Transaction Type

Owner Distribution ▾

Property

Description

Date

Amount

888 South Miami Avenue (Test Communications/1 Owner)

9/27/2024

-\$7,300.00

888 South Miami Avenue (Test Communications/1 Owner)


7/22/2024

-\$3,500.00

The **Transactions** page will provide a historical view of all owner's property-related contributions and distributions. Here you'll be able to view the contributions and distributions based on all your properties or for specific properties only. Also, you'll need to choose between Owner Distributions or Owner Contributions if you want to see one of the other.


This is basically a summary view of your Owner Distributions and Contributions at a glance.

Owner Portal - Reports



HomeTransactionsReportsMore ▾

Help Center

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Reports

Search for a report (Ctrl+F) 🔍

Business Overview

Balance Sheet	☆	Profit and Loss	☆
Balance Sheet by Month	☆	Profit and Loss by Month	☆
Balance Sheet by Property	☆	Profit and Loss by Property	☆
Balance Sheet by Quarter	☆	Profit and Loss by Quarter	☆
Balance Sheet by Year	☆	Profit and Loss by Year	☆
Cash Flow Statement	☆	Property Reserve Funds	☆
Cash Flow Statement by Month	☆	Rent Roll	☆
Cash Flow Statement by Property	☆	Rent Roll Summary by Beds/Baths	☆
Owner Statement	☆	Rent Roll Summary by Property	☆

Accounting

Bank Balance by Property	☆	General Ledger	☆
Budget vs Actual	☆	Transaction Details	☆

Who Owes You

A/R Aging Detail	☆	A/R Aging Summary	☆
A/R Aging Detail by Account	☆	Recurring Rent Transactions	☆

The Reports tab is where you'll see a list of the various reports you can view. Click on the report you want to view and it will open to that report. From there, you're able to view the report as well as export the report to Excel format, save it as PDF, and print the report.

Most reports will also have Report Setting available so you can filter for specific date ranges and filter the report based on a specific property.

Note: Owners will not be able to click on any of the transactions to view the transaction details of specific line items. They'll only

be able to view the report as presented to them.

Owner Portal - More > Requests

KBM Home Transactions Reports **More** Help Center Bunta Fujiwara

Your Requests

Create and view all requests here, including updates and which have been completed.

Search Filter (2) Date From: July 17, 2024 Date To: October 14, 2024 New Request

Subject	Property	Created Date	Status
Test	888 South Miami Avenue (Test Communications/1 Owner)	8/12/2024	Not Started

Through the More > Requests tab, you'll be able to make a new request and view a list of all the requests that you've made. These are basically communications with your property manager about specific requests you might have pertaining to your properties. From here, you can also check the status of each request.

NEW REQUEST

×

What is this request about?

Subject *

Please provide a detailed description of your request

Description

Due Date *

Related To

Property

*

Drag files or [Click here](#) to upload

jpg, png, mp4, doc, docx, pdf, xlsx, xls, no larger than 50 MB.

Cancel

Save

To make a request, you'll want to follow the instructions below:

1. On the **Owner Portal**, click the Requests tab and click **New Request** at the top right corner of the page.

2. Enter the subject of what the request is for.
3. Enter a detailed description of your request so the landlord can better understand your issue.
4. Enter the Property and Unit (optional) that this request is related to.
5. You can also upload photos or files to your Requests in case you want to document specific issues you are having. Just **drag files** or use the **click here** link to upload your files.
6. Click **Save** when you're done.

If you have a request that was possibly sent by accident or you don't need the request anymore, you can delete the request. You would do so by clicking the 3-dots to the right of the request and selecting **Delete Request** to remove it from your list of requests.

Subject	Property	Created Date	Status
Please check on the roof of my 888 property	888 South Miami Avenue (Test Communications/1 Owner) > House (Test)	9/11/2023	Not Started
Owner Request	888 South Miami Avenue (Test Communications/1 Owner)	3/15/2023	Received

View Request

Delete Request

Things to Consider

- If you see no information in the widgets, that means there is no information to show. Most of the information is dynamic so if there is information to show, it will show on the widgets automatically.
- If you are having any issues with your Owner Portal or have any questions, please contact your Property Manager who will be more than happy to help.

Did this answer your question?



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