

Property Tree Owner Portal



Property Tree Owner Portal is an online platform where you can access your tenancy information and communicate directly with your Property Manager. Property Tree Owner Portal gives you the flexibility to have real time access to your information, whenever you need it.

Getting Started

If your Real Estate Agent is using the Portal, they will send you an email invitation to join. Once you receive the invitation email, click on "**Join Now**" - You will be redirected to the Property Tree Portal page where you can create your account

Property Tree Portals offer multiple sign up methods which include:

- Property Tree Login (i.e. email address and password)
- Facebook
- Google
- Microsoft
- Twitter
- LinkedIn

Note: *The method you choose to create your account with will be one you will always use to log into the portal. It is not possible to change the login method to the portal once you have created a login.*

Accessing the Portal

Property Tree does not currently have a mobile application for owners. Access to the Portal can be gained by going to the website client.propertytree.com.

You will be able to log into the portal using the same method you used to sign up create your account. When you go to the landing page, it will state the method you used to login previously.

Linking multiple properties to one Portal

To link multiple properties to your existing portal your Property Manager will send you another email invitation, you will then need to click on "Join Now" and instead of creating a new account, click on Login and simply login using the details you previously set up. Then once you login you will have immediate access to all your properties on one portal.

Please contact your Property Manager for further assistance with linking properties.



Owner Portal Overview

Current Features available on the Owner Portal are as follows:

- Property Snapshot
- Property Details
- Income & Expenditure Reports
- Agency Details
- Access to Message Center
- Ownership Ledger
- Reports & Statements
- Rent History
- Maintenance Request
- My Documents
- Understanding Statements
- Portal Support

Property Snapshot Overview

The Owner portal will provide an overview of your Investment Properties, information displayed includes:

- Property Address
- Number of Tenancies Vacating
- Number of Tenancies in Arrears
- Number of Property Vacancies

Property Details Overview

The Portal will also give you an overview of your Investment Property and Tenancy Lease Details on file with your Real Estate Agent. Information available in relation to this includes:

- Address of the Property
- Status (Rented / Vacant)
- Arrears
- Property Details (Number of bedrooms, bathrooms and car spaces)
- Lease Dates
- Rent Amount per period
- Next rent due date

Income & Expenditure Reports

Income and Expenditure Statements provides you with a summary of your income such as rental payments and expenses such as management fees and creditor payments.

This statement includes all transactions that were reported on, in previously prepared Ownership Statements, within a specified date range.

If you need more information on any transaction appearing on the Income & Expenditure statement, refer to the Ownership statement for that period or contact your Agent.

Agency Details

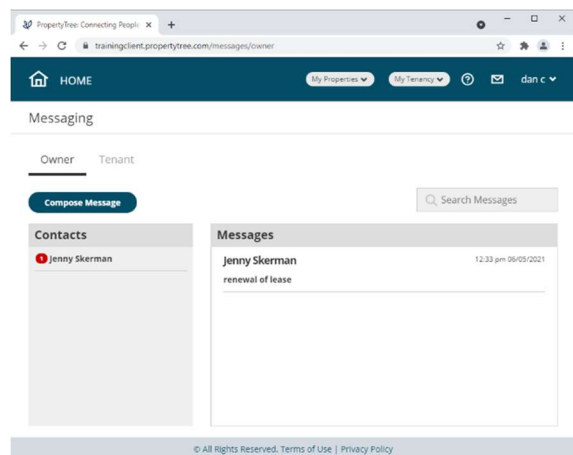
The Portal will display the following information in relation to your Real Estate Agent:

- Agency Logo
- Agency Name
- Agency Contact Number

Access to Message Center

You will be able to send and receive messages when logged into the Portal. You can reply to messages in Property Tree via the Messaging pane which you can access by clicking on the envelope icon in the header next to your username.

- Navigate to Messages by clicking on the envelope icon
- Compose New Messages
- View new and historic Portal messages



NOTE: The email notifying you of a portal message is from propertytree@propertytree.com and is a no-reply email address. We recommend you add the domain @propertytree.com to your safe sender list to ensure you receive the email in your inbox. You must reply by logging into the portal or create a new email with your Property Managers direct email address

Ownership Ledger

The Tenancy Ledger shows a list of transactions and activities made over a period of time. This includes rent received, invoices paid etc.

- Select dates for the Ownership ledger
- View ledger for period or by date range

Ownership Ledger ×

You can view your ownership ledger for any date range you require. Enter the date range below:

From
01/04/2021 ▼

To
09/05/2021 ▼

[Cancel](#) [View ledger for this period](#)

Reports & Statements

The Ownership Statement is a reflection of transactions and other financial activities that have occurred on the Ownership for a selected period.

- Statements
- Statement Period
- View Statements
- View Creditor Invoices sent with statements
- Invoice attachments

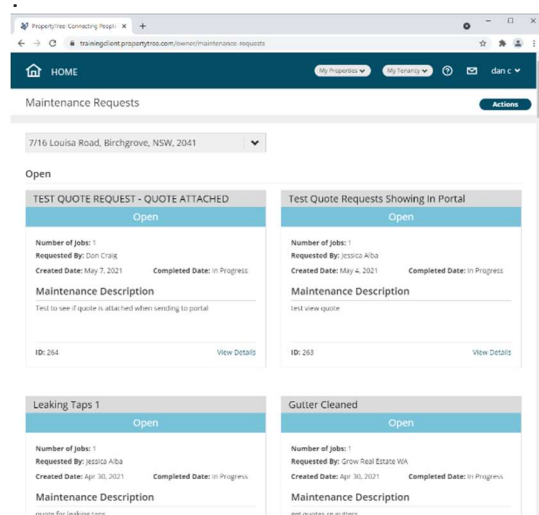
Rent History

- Property
- Rent Change Date
- Amount Charged per Period
- Difference in Amount per period (\$ / %)
- Income vs Expenses Graph

Maintenance Requests

Once logged into the Portal you can manage Maintenance Requests.

- View Quotes attached to Maintenance Request
- Request further information about a Maintenance Request.
- Approve or Reject a Maintenance Request / Quote



Viewing Maintenance Requests includes the below information:

- Status
- Number of Jobs
- Requested by
- Created Date
- Completed Date
- Maintenance Description
- Details of the Maintenance requests

Owner Maintenance Status Bar Overview

- **Under Review** - This status appears once a maintenance request has been created.
- **In Progress** - This status appears once your Property Manager creates a quotation request or work order.
- **Work Order** – This status appears once your Property Manager receives your approval to proceed and send the Work Order to the Creditor.

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- **Invoiced** – This status appears once your Property Manger received, enters and links the creditor invoice to the maintenance Job
 - **Completed** - This status appears once your Property Manager receives confirmation that the maintenance job has been completed.

My Documents

The My Documents page allows your Property Manager to share important documents that relate to your property, which can be viewed at any time.

The table displays the Document Name, document file Type and the Last Date Modified. To view the document, simply click the eye icon.

Updating Account Information

Owners have the ability to update the following:

- Update Email Address (*note this will not change the email used to set up your profile and will no notify your Property Manager of your new email address*)
 - A Verification code will be sent to ensure the email address is valid and the code will need to be entered in order to save the changes.
- Update Given Name and Family Name
- Create a New Password
 - Once entered Owners will be required to confirm the new Password and approve the change by entering the previous Password used to access the Portal

For any other changes to your account not listed in this article, Please contact your Real Estate Agent.