

Owner Portal Help Manual

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Custom Portal Data entry in Yardi

Custom Portal Data entry in Yardi Overview

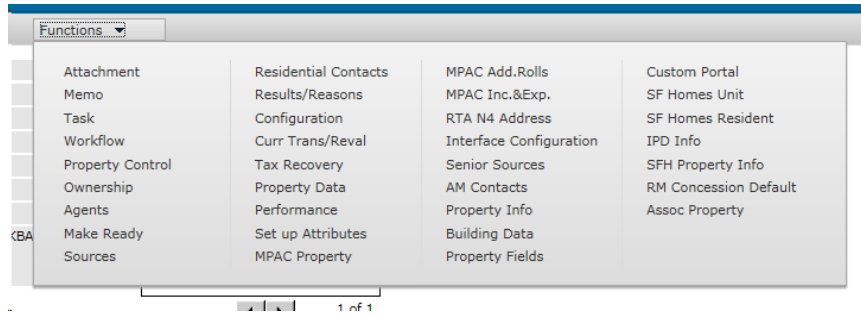
You can use Yardi Voyager web interface to upload custom portal data that will then be exported via Yardi ETL to an Owner Portal. You can activate or deactivate an existing custom portal for a property.

Upload steps

To upload custom portal data:

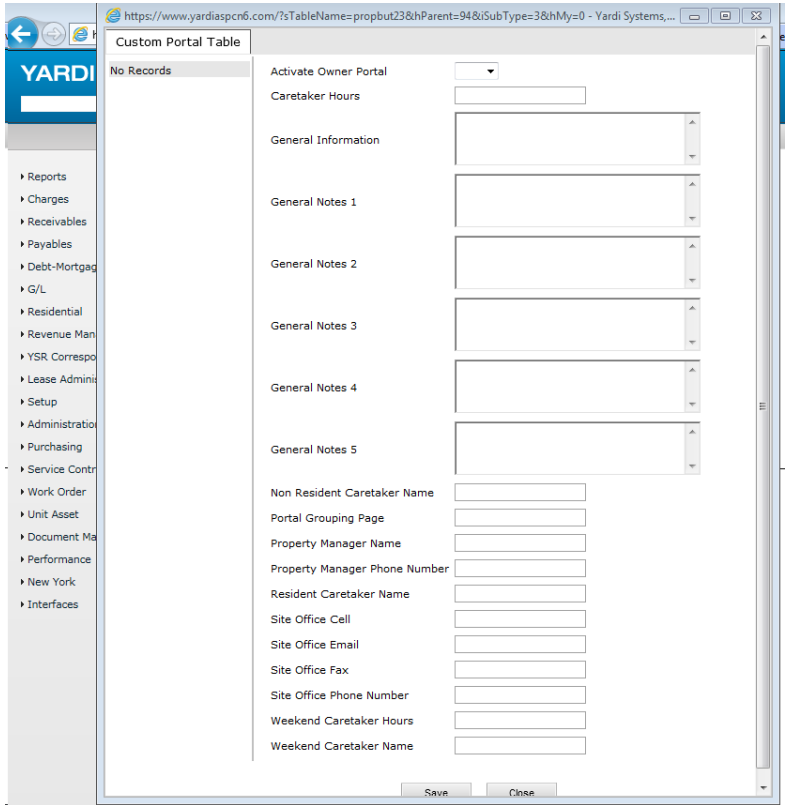
1. Access the Yardi Voyager web interface
2. In the left navigation menu go to Setup → Property → Review Property
3. Locate a Property
4. Go to Functions → Custom Portal

Custom Portal link



5. A dialog will open allowing for entry of Custom Portal information for the current property.
6. For Activate Owner Portal choose Yes to activate a portal. Selecting a No option will disable a custom owner portal.
7. Entry data for each field that you would like to display on the Property Page

Custom Portal entry dialog



Data rules:

1. If you don't specify a value for a field in the Custom Portal entry dialog then this field and field label will not display on the Property Page.
2. The pipe character (|) is not permitted for use as this will cause the nightly data load to fail.

Owner Portal Administration Site

Owner Portal Administration Site Overview

The Owner Portal Administration Site contains administration functionality that facilitate management and reporting of the following Owner Portal artifacts:

- Property photo
- Documents
- Events
- Data Load Reports

Accessing Owner Portal Administration Site

You can access the Owner Portal Administration Site via web browser at <https://www.profilelink.ca>

Enter your account credentials in fields provided.

Property Photo

Property Photo Overview

You can manage Property Photo for a Property via Property Manager. You can add or update an existing property photo via Manage Property Photo.

Accessing Property Manager

To access Property Manager go to Property → Property Manager.

Add or Update Property Photo

To view a list of Properties select the following:

1. All Properties
 - a. Yes – view all properties.
 - b. No – view inactive Properties that have active owner portal value set to No (i.e. active portal is No in Yardi)
2. Active/In-active Portal – Set to Yes to view all active properties with an Owner Portal.
3. Strata Number – Specify strata number
4. Then go to Filter. Select Manage Property Photo to add or update Property Photo.

Property Photo Upload Guideline - Photos should be saved in JPEG format (.jpeg extension) at 96 DPI. Size: 570 pixels wide by 360 pixels in height.

5. Photo File Upload - Select Choose File
6. Existing Property Photo – Existing photo will display if present otherwise “No photo exists” displays.
7. Go to Save & Close to complete add or upload a property photo.

Documents

Documents Overview

You can manage Documents for a Property via the Documents Manager. You can View, Add, Update and Delete Documents in the Documents Manager for a Property Owner Portal.

Accessing Document Manager

To access Document Manager go to Document → Document Manager.

Adding Owner Portal Documents

To add a Document for an Owner Portal go to Add Document. To upload a new Document for a Property enter the following:

1. Select a Property from the list of Properties - This is a required field
2. Enter a Title - This is a required field
3. Select a Document Category - This is a required field
4. Specify a file via Choose File - This is a required field
5. Specify a Friendly Filename that includes a proper file extension such as .PDF or .doc or docx. The Friendly Filename will be the filename downloaded by an end user. For example: Enter ByLaws.pdf – This is a required field.
 - a. **Friendly Filename must have a unique name among all documents for a Property.**
 - b. **Friendly Filename becomes the filename that is used as the filename for the document downloaded by end user's. The filename must only contain the following characters: - _ . space ~**
 - c. **The following characters are not permitted in a filename and may lead to an error: ! * ' () ; : @ & = + \$, / ? % # []**
 - d. **If an existing document has any of the characters not permitted you will have to remove these characters from the filename.**
6. Specify a Description – This is an optional field.
7. Specify a Document Date – This is a required field. Displayed in output for Owner Portal.
8. Specify an Expiry Date – This is an optional field that can be used to expire Documents from an Owner Portal for all general categories, Special General Meeting and Annual General Meeting. Expiry Date does not apply to Documents assigned to the Council Document Category.
9. Go to Save & Close to add a Document.

Updating Owner Portal Documents

To update a Document for an Owner Portal go to Document Manager and select a Property from Property list drop down and then go to Filter. Select Manage beside the Document to update.

To update an existing Document for a Property enter the following:

1. Property - Property is not a field that can be updated once a Document has been added.
2. Title - Enter a Title - This is a required field
3. Document Category - Select a Document Category - This is a required field
4. File Upload - Specify a file via Choose File - This is a required field

5. Existing File – You can download an existing document for preview purposes. Due to security the download link is only usable for 10 minutes after which you won't be able to access the document.
6. Friendly Filename - Specify a Friendly Filename that includes a proper file extension such as .PDF or .doc or docx. The Friendly Filename will be the filename downloaded by an end user. For example: Enter ByLaws.pdf – This is a required field
 - a. **Friendly Filename must have a unique name among all documents for a Property.**
 - b. **Friendly Filename becomes the filename that is used as the filename for the document downloaded by end user's. The filename must only contain the following characters: - _ . space ~**
 - c. **The following characters are not permitted in a filename and may lead to an error: ! * ' () ; : @ & = + \$, / ? % # []**
 - d. **If an existing document has any of the characters not permitted you will have to remove these characters from the filename.**
7. Include for Email Notification - Specify if Document should be sent in Document Notification Email by checking Include for Email Notification. Unchecking this option will not included the document in the daily email notification.
8. Description - Specify a Description – This is an optional field
9. Document Date - Specify a Document Date – This is a required field. Displayed in output for Owner Portal.
10. Expiry Date - Specify an Expiry Date – This is an optional field that can be used to expire Documents from an Owner Portal for all general categories, Special General Meeting and Annual General Meeting. Expiry Date does not apply to Documents assigned to the Council Document Category.
11. Active - Specify if a document is active. Checking this option will make a document active. Unchecking this option will disable a document from being displayed.
12. Go to Save & Close to update a Document.

Deleting Owner Portal Documents

To delete a Document for a Owner Portal go to Document Manager and select a Property from Property list drop down and then go to Filter. Select Manage beside the Document to delete.

1. Go to Delete Document, which will remove the physical file and associated document. Please note there is no confirmation when deleting a document.

WARNING: There is no recycle bin or option to retrieve the document once deleted. Clicking Delete will instantly delete the document along with the associated file without warning.

Owners

Owners Overview

You can manage Owners for an Owner Portal via the Owner Manager. You can View, Delete Portal Account, and Disable/Enable Owner Portal Owner account.

Accessing Owner Manager

To access Owner Manager go to Owner → Owner Manager.

View Owner Portal Owners

To view a list of Owners select the following:

1. Property from Property list drop down
2. Active/In-active Owner – Select Only Portal User which will show only Owners that have a Portal account OR select All user which will show both Owners with a Portal account and those Owners without a portal account.
3. Last Name – Specify a full or partial last name
4. Go to Filter. Select Manage beside the Owner to view.

Delete Portal Account

To delete a portal account select Manage beside the Owner to delete.

1. Go to Delete Portal Account, which will remove the Owner portal account. Please note there is no confirmation when deleting an Owner portal account.

Disable/Enable Owner Portal Owner account

To enable/disable a portal account select Manage beside the Owner to enable or disable.

1. Go to Enable/Disable Portal Account, which will disable or enable the Owner portal account. Once disabled a user will not be able to login to the Owner Portal.

Events

Events Overview

You can manage an Event for a Property via the Event Manager. You can View, Add, Update and Delete Events in the Event Manager for a Property Owner Portal.

Accessing Event Manager

To access Event Manager go to Event → Event Manager.

Adding Owner Portal Events

To add an Event for an Owner Portal go to Add Event. To upload a new Event for a Property enter the following:

1. Property - Select a Property from the list of Properties - This is a required field
2. Title - Enter a Title - This is a required field
3. Description - Specify a Description – This is a required field
4. Start Date - Specify a Start Date – This is a required field that defines the start date an event occurred on.
5. End Date - Specify an End Date – This is a required field that defines the end date an event occurred on.
6. Active - Specify if an event is active. Checking this option will make an Event active. Unchecking this option will disable an Event from being displayed.
7. Go to Save & Close to save an Event.

Updating Owner Portal Events

To update an Event for an Owner Portal go to Event Manager and select a Property from Property list drop down and then go to Filter. Select Manage beside the Event to update.

To update an existing Event for a Property enter the following:

1. Property - Property is not a field that can be updated once an Event has been added.
2. Title - Enter a Title - This is a required field
3. Document Category - Select a Document Category - This is a required field
4. Description - Specify a Description – This is an optional field
5. Document Date - Specify a Document Date – This is an optional field that is displayed in output for an Owner Portal.
6. Expiry Date - Specify an Expiry Date – This is an optional field that can be used to expire Documents from a Property Owner Portal for all general categories, Special General Meeting and Annual General Meeting. Expiry Date does not apply to Documents assigned to the Council Document Category.
7. Active - Specify if an Event is active. Checking this option will make an event active. Unchecking this option will disable an event from being displayed.
8. Go to Save & Close to update an Event.

Deleting Owner Portal Events

To delete an Event for an Owner Portal go to Event Manager and select a Property from Property list drop down and then go to Filter. Select Manage beside the Event to delete.

1. Go to Delete Event, which will remove the event. Please note there is no confirmation when deleting an event.

WARNING: There is no recycle bin or option to retrieve the event once deleted. Clicking Delete will instantly delete the event without warning.

Data Load Reports

Data Load Reports Overview

You can view data exported from Yardi into the Owner Portal via Data Load Reports. Each day before data is loaded into the final Owner Portal database table it is first exported to staging tables. Data Load Reports provide a report view into the staging tables. You can view previous data load details by date for Building, Tenant, Unit, Property, and Portal. This allows you to analyze individual field data that is exported from Yardi to the Owner Portal.

Accessing Data Load Reports

To access Data Load Reports go to System → Data Load Reports.

Owner Portal Email Content

Registration Welcome Email

From email address: noreply@profile-properties.com
Email Subject: Welcome to Profile Properties

Body:

Welcome to Profile Link, the gateway to your community. With just a few clicks you can have quick and secure online access to the latest strata meeting minutes, bylaws, insurance and other important documents as well as a calendar of events for your complex. This information is available to you 24/7 from a desktop, smartphone or tablet. As we move forward we will be working to enhance your experience by providing additional capabilities including the ability to view your account statement. So welcome, and get started now to see what a difference connected living can make.

<https://www.profilelink.ca>

Username: [Clients email address]

Owner Document Notification Email

Email Subject: Owner Portal - Documents Updated

Body:

Dear John Haigh,

The following document(s) have been posted to your Strata Corporation's web site. Please click on the document or go to <https://www.profilelink.ca> to sign in and view the new documents.

- [Bylaws #1](#)
- [Winter Reminders](#)

Update Contact Information Email notification to Profile Properties

To email address: Email to is configurable via Administration Site String Resource Manager

Email Subject: Owner Contact Information Updated

Body:

New Profile Properties Owner Update,

Property Name: Adventure Ridge

Firstname: Patricia Denise

Firstname old value: Patricia Denise

Lastname: Anderson

Lastname old value: Anderson

Address 1: 243-255 Newpjort Drive

Address 1 old value: 243-255 Newpjort Drive

Address 2:

Address 2 old value:

City: Port Moody

City old value: Port Moody

Province: BC

Province old value: BC

Postal Code: V3H 5H1

Postal Code old value: V3H 5H1

Home Number:

Home Number old value:

Office Number: 7783550474

Office Number old value: 7783550474

Cell Number:

Cell Number old value:

Other Number: 6049165059
Other Number old value: 6049165059

Email: john.albert.haigh@gmail.com
Email old value: john.albert.haigh@gmail.com

Comments:

No comments specified

This information applies to all Strata Owners
Yes

Support Request Email notification to Profile Properties – User who is not logged in

Email Subject: Profile Properties Owner Portal Support Request

Body:

Support Request,

Sent on: 3/14/2015

Support Request Type: General Support Inquiry

Fullname: John Haigh

Strata Number: lms7788

Address: test

Email: haighis@gmail.com

Comments:

I need some help.

Is Member: Not logged in

Owner Property: Not logged into Client Central (not authenticated), no Property Name available

Support Request Email notification to Profile Properties – User who is logged in

Email Subject: Profile Properties Owner Portal Support Request

Body:

Support Request,

Sent on: 3/14/2015

Support Request Type: General Support Inquiry

Fullname: Patricia Denise Anderson

Strata Number: Adventure Ridge

Address: 243-255 Newpport Drive, , Port Moody, BC

Email: john.albert.haigh@gmail.com

Comments:

How do I change my password?

Is Member: Is a logged in member

Owner Property: Property Name: Adventure Ridge - Email: john.albert.haigh@gmail.com -
Username: john.albert.haigh@gmail.com

Document Email Notifications

Document Email Notifications Overview

Document Email notifications are sent automatically each night at 11:00 PM EST/8:00PM PST. Any documents that are marked as "Include for Email notification" flag set to checked.

Owner Portal Business Rules

Owner Portal Business Rules Overview

There are two business rules for User Registration issues that encapsulate the following two scenarios:

Message ID 245 Scenario

- User executes the registration process and there is already an account registered for the same email address is defined as Message ID 245.

Message ID 250 Scenario

- User executes the registration process but it not able to register as their email address does not exist in the database is defined as Message ID 250. Message ID 250 is caused by Data Load Failure on the Portal Side or Data Load Failure in Yardi.
 - o This business rule failure happens because of the above data load failure and results in the following:
 - The user tenant record has not been exported from Yardi to the Owner Portal OR
 - The tenant record has been exported but contains an incorrect email address. For example the user email address is on record in the Owner Portal as 111@test.com, but the user states there email address is actually 222@test.com OR
 - The tenant record exists but contains no email address value.

To easily distinguish user registration issues the two business rules are identified as Message ID 245 and Message ID 250. During the registration process if a user encounters either of these issues then they view message ID 245 or message ID 250 outputted to the screen.

User Registration Business Rules

User message: Message ID 245. User already registered.

Audit Event: Message ID 245. User did not complete register step 2. User already registered. Request for the user to reset their password.

User message: Message ID 250. Unable to complete registration. Please contact Profile Properties.

Audit Event: Message ID 250. User did not complete registration step 2. Unable to complete registration. Tenant record does not exist in database or this is an invalid email address. Please review Yardi for this strata owner.

Owner Portal Data Load

Owner Portal Data Load Overview

The Owner Portal Data Load processes Yardi data that is then loaded into the Owner Portal Database. A Yardi process will export data from the Yardi database system based on the schedule below. Owner Portal Data Load will process Yardi data files based on the schedule below.

The Owner Portal Data Load takes approximately 2 minutes to process and complete.

Schedule

Yardi CSV File Export – Daily @ 3:00 AM EST
Owner Portal Data Load – Daily @ 6:00AM EST

Data Load Alert Notifications

An email notification is sent daily at 6:00AM EST when the Owner Portal Data Load begins. An email notification is sent when the Owner Portal Data Load completes shortly after at 6:02AM EST.

Support Procedure for Data Load Failure

In the event the data load fails due to an error, the developer is notified via email upon failure. The developer will notify Profile Properties that there is a data load error, advise that an investigation is in progress and will open a Support Ticket to track Data Load Failure details from start to finish until there is a resolution.

Possible causes for Data Load Failure

1. Bad data in Yardi. An example of bad data in Yardi includes:
 - a. The existence of the Pipe character in data within Yardi that is extracted.
 - b. Each field of data being exported has a maximum length. If this Maximum length exceeds the current maximum (as per the Portal Mapping Document) then the data load may fail. This can happen if you change the Custom Portal table field length or if Yardi changes the current field size.
2. Badly formed CSV files exported via Yardi
3. No CSV files sent by Yardi

Owner Portal Site Outages

The Owner Portal Site is monitored via a free Network Monitoring application called Pingdom that will monitor for site outages and then automatically email the developer via email if there is a site outage.