Owner Portal Guide

Buildium®
Property Managed.

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Purpose

The purpose of this document is to review the features associated with the Buildium, Owner Portal.

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Owner Portal

Buildium is an all-inclusive property management software used by many professional companies across the country. One feature of Buildium is the online, Owner Portal clients have access to 24-7.

Use your Owner Portal to access real-time information regarding your rental properties. The Owner Portal allows you to do the following:

- View financial statements online
- Review various reports about your property
- Communicate with the management team
- Update contact information

Continue on to the next page for information about logging into your Buildium account.

Logging Into Your Buildium Account

Visit This Link to Log In:

https://cregpropertymanagement.managebuilding.com/Resident/portal/login

- Use you email address that is on file as the user name.

    o **First time signing in?** Your property manager will create your Buildium account. Once your account is set up, you should receive an email directly from Buildium explaining how to log into your account.

    o **Didn't receive an email or forget the email?** On the log in page, select *Forgot Password?* and follow the steps to create a new password. (see the highlighted section in the picture below)

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Email

> Type your email...

Password

> Type your password... 👁

☐ Remember me   Forgot password?

Sign in

Property manager, rental owner, or vendor? **Sign in here**

Buildium Layout

Learn about the different pages on Buildium and how to navigate each section successfully.

Financials

Reviewing Property Finances

- There is a total of four pages you can visit at any point while logged into your account; *FINANCIALS, RENTAL OWNER LEDGER, DOCUMENTS* and *REQUESTS.* When you log into your account, you will automatically be taken to the *Financials* page.
  Here is what you will see upon signing into your Owner Portal:

- To view a specific property's finances, select the property of interest from the drop-down menu labeled *PROPERTY*. Then, select the time frame by using the drop-down menu labeled *PERIOD*. Make sure *Cash basis* has been selected before hitting the green, *Search* button (see highlighted sections for specific locations).

- Once you hit the green, *Search* button select the property address that is highlighted in blue so that the income and expenses populate. You should see all income and expenses based on the time frame you selected. You will notice some of the dollar amounts are listed in blue and some in black. Any amount listed in blue can be selected to review further information.

PROPERTY	PERIOD			
3025 ▮▮▮▮	Three months to date	Search		

● Cash basis ○ Accrual basis

PROPERTY ACCOUNT (CASH BASIS)	AUGUST 2019	SEPTEMBER 2019	OCTOBER 1 TO DATE	TOTAL AS OF 10/14/2019
— 3025 ▮▮▮▮				
Income				
Rent Income	$3,295.00	$3,295.00	$3,295.00	$9,885.00
Total income	**$3,295.00**	**$3,295.00**	**$3,295.00**	**$9,885.00**
Expenses				
CREG Cleaning, Repairs, Maintenance - Hallway Cleaning	$30.00	$0.00	$0.00	$30.00
CREG Cleaning, Repairs, Maintenance - Hourly Maintenance (CREG)	$36.30	$0.00	$0.00	$36.30
Total expenses	**$66.30**	**$0.00**	**$0.00**	**$66.30**
Net operating income	**$3,228.70**	**$3,295.00**	**$3,295.00**	**$9,818.70**
Net income	**$3,228.70**	**$3,295.00**	**$3,295.00**	**$9,818.70**

Expense Details and Receipt Attachments

- To review further details about an expense, click on one of the blue dollar amounts associated with the expense item. It will take you to a new page with details of that specific expense (see the highlighted section for the specific location).

Expenses	
CREG Cleaning, Repairs, Maintenance - Hallway Cleaning	$30.00
CREG Cleaning, Repairs, Maintenance - Hourly Maintenance (CREG)	$36.30
Total expenses	**$66.30**

- After selecting the blue dollar amount you will arrive on a new page. You can review the details of that specific expense from here. To review the actual receipt or invoice related to that expense, select the paperclip icon (see the highlighted section for the specific location). Clients have access to all receipts/invoices for any expense listed. If there isn't an attachment, there should be a description of the services completed under the *DESCRIPTION* section.

DATE (CASH BASIS)	PROPERTY OR COMPANY	NAME	DESCRIPTION		AMOUNT	BALANCE
— Maintenance & Repairs - Appliance Repair/Replace						
PRIOR BALANCE						$254.85
2/4/2019	3025 ■■■	A1 Appliance Service		📎	$96.25	$351.10
2/4/2019	3025 ■■■	Recker and Boerger	refrigerator unit 4	📎	$680.48	$1,031.58
Total Appliance Repair/Replace					**$776.73**	**$1,031.58**

Rental Owner Ledger

Term Definition:
- "Owner Draw" = Total income sent to property owners each month
- To review the history of Owner Draws performed each month, select *RENTAL OWNER LEDGER* from the tab at the top of your Buildium account (see highlighted section for specific location).

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FINANCIALS   RENTAL OWNER LEDGER   DOCUMENTS   REQUESTS   REPORTS

- From the Rental Owner Ledger, you can review each Owner Draw transaction that has occurred while working with your management team.

Rental owner ledger

📄 Statement ▾

DATE	PROPERTY	NO.	MEMO	AMOUNT
— Owner Draw				
9/13/2019	3025 ▮▮▮▮		REVERSED - Voided per customer request.: Owner Draw	($3,246.85)
9/13/2019	3025 ▮▮▮▮	↺ EFT	Owner Draw	$3,246.85
5/17/2018	3025 ▮▮▮▮	EFT	Owner Draw	$1,025.00
Owner Draw total				**$1,025.00**

- You can also view all transactions you have done if you had ever had to send your property management team funds. Those transactions will be under Owner Contribution.
  - Funds may be requested at anytime if maintenance items exceed the specific amount listed in your Owner Agreement with the management team.
  - To send funds, you will find a white *Send funds* button located on the top right-hand side of the FINANCIALS, RENTAL OWNER LEDGER or REQUESTS page. Click that link and follow the instructions to make a payment.
    - Payments can be made by eCheck or Credit card. The system charges a small fee for using a credit card.

Send funds

Documents

- To view any documents shared between you and your management team, select the Documents tab from the top of your Buildium page.

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FINANCIALS   RENTAL OWNER LEDGER   DOCUMENTS   REQUESTS   REPORTS

- From this page, you can view:
  - Lease agreements for each resident
  - Owner Contracts,
  - Property inspection reports and much more

You can download copies of each document for your records, if interested. Simply, click on the name of the document that is in blue.

Documents

1 document matches

NAME	CATEGORY	SIZE	UPDATED ON
Lease agreement - ███████	eLease agreement	299KB	10/11/2018 2:09 PM

Requests

- If you have a request for our team, one option is to do so on Buildium.
  - Though, you can also send an email to support@truehomeohio.com.
- To send a request from your Buildium account, select Requests from the tab at the top of your account page.

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FINANCIALS   RENTAL OWNER LEDGER   DOCUMENTS   REQUESTS   REPORTS

- Click the green, *Add request* button from the right-hand side of the page. Follow the prompts that appear on the next page to complete the request.

Rental owner requests

Add request

All properties	(2) New, In progress

ID	SUMMARY	PROPERTY	STATUS	CREATED	▾

We didn't find any requests. Maybe you don't have any or maybe you need to clear your filters.

Submit a request ?

SUBJECT

DESCRIPTION

65500

+ Attach files or photos...

PROPERTY

Select a property...

Submit   Cancel

Reports

- If you are ever searching for a specific report based on your property, you will find it here. Click the Reports tab on the far-right hand side. You will be taken to a new page listing out different Financial, Rental and Task related reports.

- From the list of reports, select the report of interest. Do so by selecting the title of the report labeled in blue. The description of the type of report will be listed below each report title.
    - The Balance sheet report is highlighted in the image below to show you where to click to retrieve a report.

Profile Settings

- To change your profile settings on Buildium, select your initials circled and labeled in orange at the top right-hand side of the page (see the arrow in the image located below for specific location). A drop-down menu will appear. Select *My settings* from the menu.
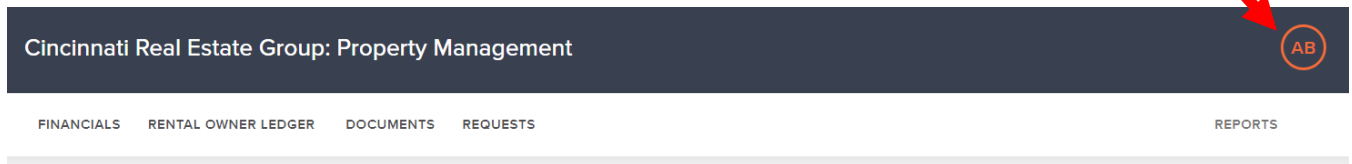
General:

- From the *General* settings page, your personal information can be adjusted. This includes you name, company name (if you have one), email address and various phone numbers.

- You also will have the option to upload a Profile photo. Select the green, *Upload* button to upload a picture from your computer. You can also upload pictures from Facebook, Google or Gravatar. Please note, this feature is optional.

Profile photo

- E-payment information can be found on this page, as well. The last 4 digits of your account that is on file will be presented here. If this information is inaccurate or needs to be updated, please contact your management team for assistance.

E-payment information

Your checking account ending in 5347 is set up to receive electronic payments. *If this information is incorrect, or if you want to change it, please contact us.*

Save changes   Cancel

- Remember to click the green, *Save changes* button at the bottom of the page after making any alterations on the is page.

Security:

- On the left side of the *My settings* page is a *Security* tab. This section is available if you ever need to change your password for logging into Buildium or if you are interested in setting up a Two-factor authentication.

- Two-factor authentication is a setting that requires you to enter in a code that is texted to you once you have signed in with your user name and password. This feature is used as an extra lawyer of security.

My settings

General
Security

Security

Password

Last changed more than 4 months ago ⓘ

Change password

Two-factor authentication   REQUIRED

Protect your account by adding an extra layer of security. Once set up, you will need to enter your password and a code sent to your phone during sign-in. Learn more

Set up two-factor authentication