

An Easy to Use Secure Owners Portal!

Now your owners can have on-demand access to their owner reports. This is another valuable benefit you can provide to your owners. The good news is that we've approached it in a unique way that won't result in owners calling you when they forget their username and password (a common challenge with Owners Portals). All they need is their email address to gain access. There are no logins or passwords for you to manage or for your owners to remember!

What can you post to the Owners Portal?

You will have the option to post current and historical Owner Packets and attach any reports to the Owners Portal. Then you can allow your owners to download these reports, on demand, in PDF format. They will have access to the same Owner Packets you provide to them on a monthly basis.

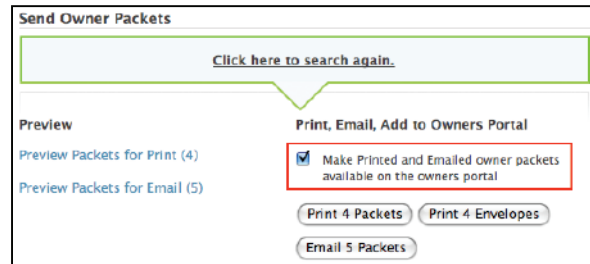
How do Owners get access to the Owners Portal?

Simply provide the Owner with the login page associated with your account (Typically in the form of "companyname.appfolio.com") to grant access. The owner then clicks the link called Access Owners Portal. When prompted, they enter their email address and click Send Access Email. After that an email with a one-time link to the portal is sent to his/her email inbox. He/she can then open the email and click the special one-time-use link to enter their Owners Portal and gain access to the Owner Packets. Owners will need an email address on file in AppFolio to receive the access email.

How do you add Owner Packets to Owner Portals?

All that needs to be done is to select the option to "Make Printed and Emailed owner packets available on the owners portal" when sending Owner Packets.

When you print or send the Owners Packets they will be automatically added to the Owners Portal. If you wish to only make packets available to select owners, use the search filter to narrow your results prior to printing and sending.



How do you view and edit the Owner Portal?

Once you have posted Owner Packets to the Owner Portal, go to a specific owner's page and you will see in the right-side Task Pane a new link to Manage Owner Portal. (Please note this link will only appear after you have posted Owner Packets and have elected to have them added to the Owners Portal).

When you click on the Manage Owners Portal link it will open a new browser window with an edit view of the specific owner's Owner Portal and Packets.

Should you desire to remove an item from the Owners Portal, simply click the round red "-" button and the item will be removed.

