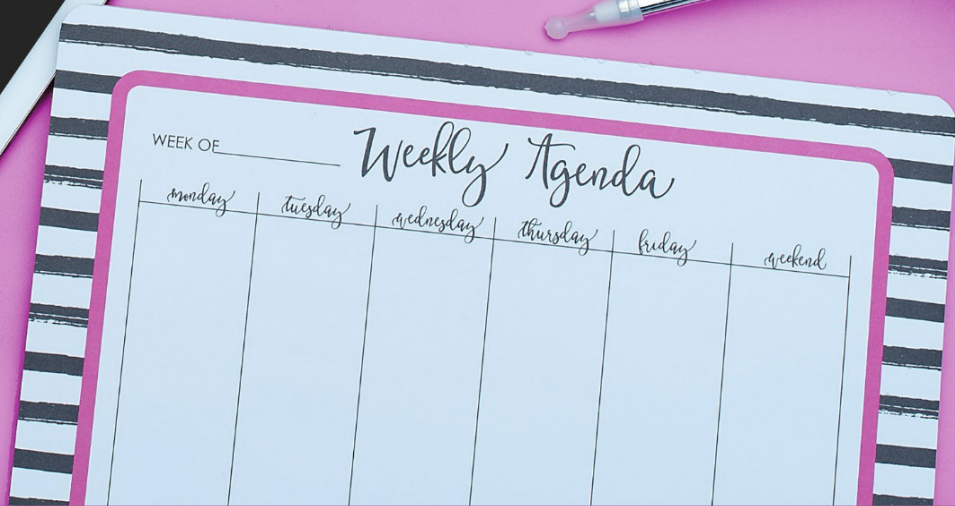




RESIDENT[®]



LEASEHOLDER DASHBOARD MANUAL

WWW.RESIDENT.UK.COM

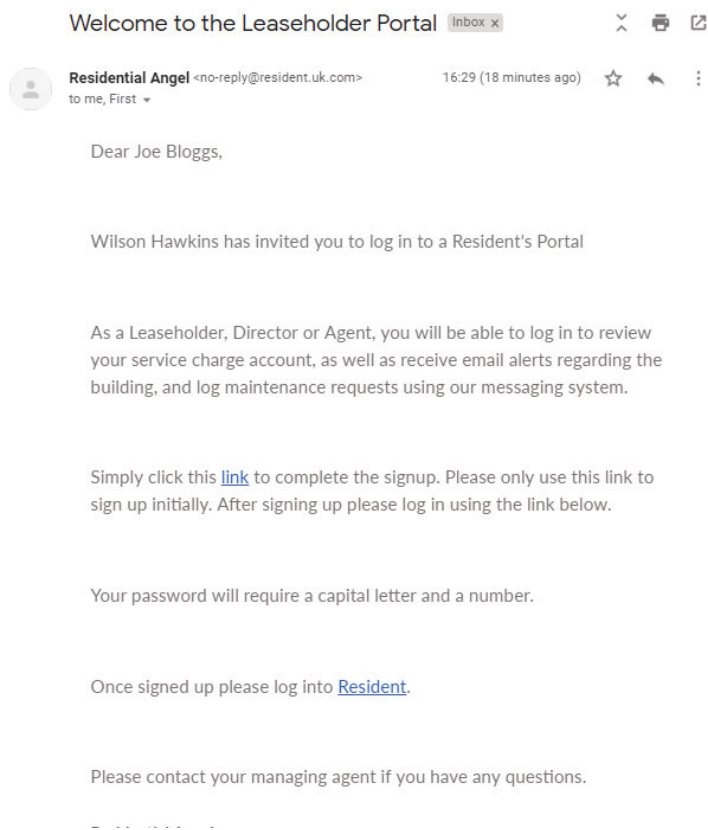
Contents

| | |
|-------------------------------------|----|
| Logging in for the first time | 2 |
| The dashboard | 4 |
| Inbox | 5 |
| Statement | 9 |
| Budgets | 11 |
| Arrears | 12 |
| Inspections | 13 |
| Utilities | 14 |
| Insurance | 16 |
| Files | 17 |
| Switch Roles | 18 |

This manual aims to show you how to use the Leaseholder portal. Please keep in mind all content below is presented using default configuration of access. If your agent has adjusted it you might have either more or less sections you can access. For any queries regarding this please contact your agency/administrator.

Logging in for the first time

To sign up to Resident you must be sent an invitation email by your administrator. The email you will receive will look something like this:



Please follow the instructions on this email and click on the link to get started.

This link will take you to the following sign up page:

The screenshot shows the Resident Block Management Software sign-up page. At the top, the Resident logo is displayed. Below it, the text reads "WELCOME TO RESIDENT® BLOCK MANAGEMENT SOFTWARE". A message states: "Please login or if you do not have an account, **Sign up for a free trial**, or if you have forgotten your password, **request a reset**." The sign-up form includes fields for "Email address" (placeholder: "Your email address") and "Password" (placeholder: "Your password"). A "Sign up" button with a lock icon is positioned below the password field. To the right, under the heading "Login with", there are five buttons for social media and operating system logins: Facebook, Google, Twitter, Windows, and LinkedIn. A vertical line with the word "OR" separates the email/password sign-up from the social media logins. At the bottom of the form, it says "Powered by © Resident (V3.1). All rights reserved."

Here you may sign up with your email address, Facebook, Google, Twitter, Windows or LinkedIn account. Please remember which account you have used (or email address if this is the case) as you will need to know this to restore the account if a password is forgotten. We would always suggest to use the same email address that you received the invite to as this will be the email address saved on Resident for you. This improves the chances of us being able to help in the event that the email address used is forgotten.

If you are opting to use an email address you must type the password you would like. This is case sensitive. Numbers and symbols are not required but they are recommended.

The dashboard

Congratulations! You are now signed up to Resident.

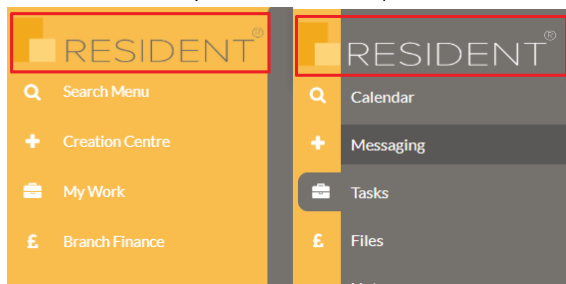
Below is an example of how our dashboard will look once we are signed in:



This will be our landing page and we will be able to get back to this page at any time by clicking on the house icon on the top right:

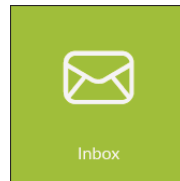


or our agency logo from any location. This logo can be found on the very top left as shown here (please note that the logo will be your own agency logo rather than the Resident logo and the menu colours are likely to be different):



This guide will break down what all of the tiles on our dashboard do and a brief description of what can be found in each area. If there is no data or not the data you are looking for in any of these areas please contact your administrator for details.

Inbox



The Inbox button will take us to our Resident inbox. Here we will be able to see and open any messages sent to us and send messages to others.

When we first click on the tile we will be taken to our inbox as shown here:

Messaging

Dashboard / Leaseholder / Messaging / Messages / Messaging

Inbox New Message

Search

| Date | Subject | Sender | Recipient | Action |
|------------------|------------------------------------|-----------------|----------------------------------|--------|
| 18/07/2019 09:17 | Unit Statements Download now ready | First Librarian | First Librarian; First Librarian | |
| 15/07/2019 15:44 | Invoice Group Download now ready | First Librarian | First Librarian; First Librarian | |
| 15/07/2019 15:05 | Invoice Group Download now ready | First Librarian | First Librarian; First Librarian | |
| 15/07/2019 14:08 | Invoice Group Download now ready | First Librarian | First Librarian; First Librarian | |

We can see all of our messages, the date received, the sender and the recipients.

To send a new message we can simply click on the 'New Message' button found on the very top right. Here we will be given the following page (yours will be blank at first):

The screenshot shows the 'Messages' page in the Resident system. At the top right, there is a breadcrumb trail: [Dashboard](#) / [Leaseholder](#) / [Messaging](#) / [Messages](#). The main heading is 'Messages'. Below this, there is a 'Recipients' section with two dropdown menus: 'Users Group' (set to 'AC Arundel Castle') and 'Contacts' (containing 'First Librarian (Director)' and 'Alex (Branch Administrator)'). Below the recipients is a 'Compose Email' section. It has a 'Subject' field with the text 'Meeting'. The 'Body of Message' section contains a rich text editor with the text: 'Good morning, I will not be able to attend the meeting this morning. Please see Image regarding leaky roof attached. Apologies. Kind regards, Joe Bloggs'. Below the body is an 'Attachments' section showing a thumbnail of a document with the text 'Remove file'. At the bottom are 'Cancel' and 'Send' buttons.

Sending a message from Resident will make the message appear in the inbox of the other user. It will also send an email to these users.

To send a message from Resident we must fill out all of the boxes given. Here is a description of what each box is for:

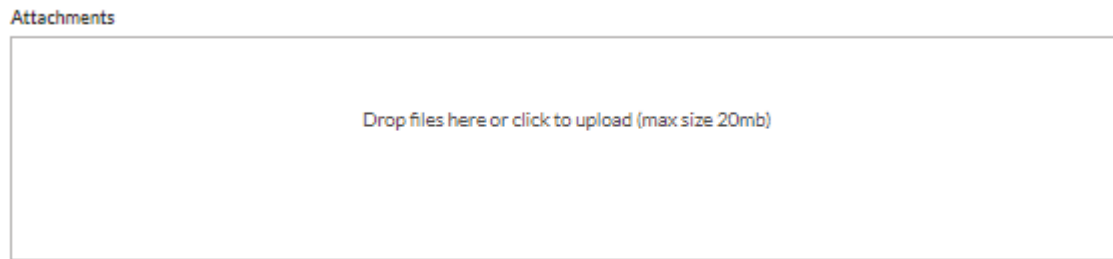
User Group: Will allow us to choose which block we would like to choose contacts for (if you have properties in only one block then only one option will be available).

Contacts: Here we must choose the people we would like the message to be send to. These stack so we can choose more than one person and they will create a list within the box as shown. To remove a person added accidentally, or if we change our mind, we can click on the X next to their name in the 'Contacts' box.

Subject: This will be the subject of the message and the email that will also be sent out.

Body of Message: This will be the contents of the message and also the email.

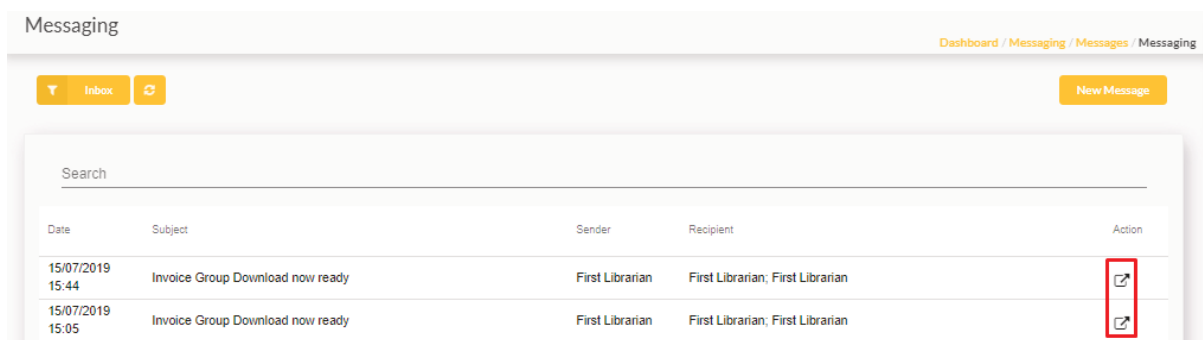
Attachments: This is optional. We may want to attach a file just as we would an email. When the 'Attachments' box is empty it will look as shown below.



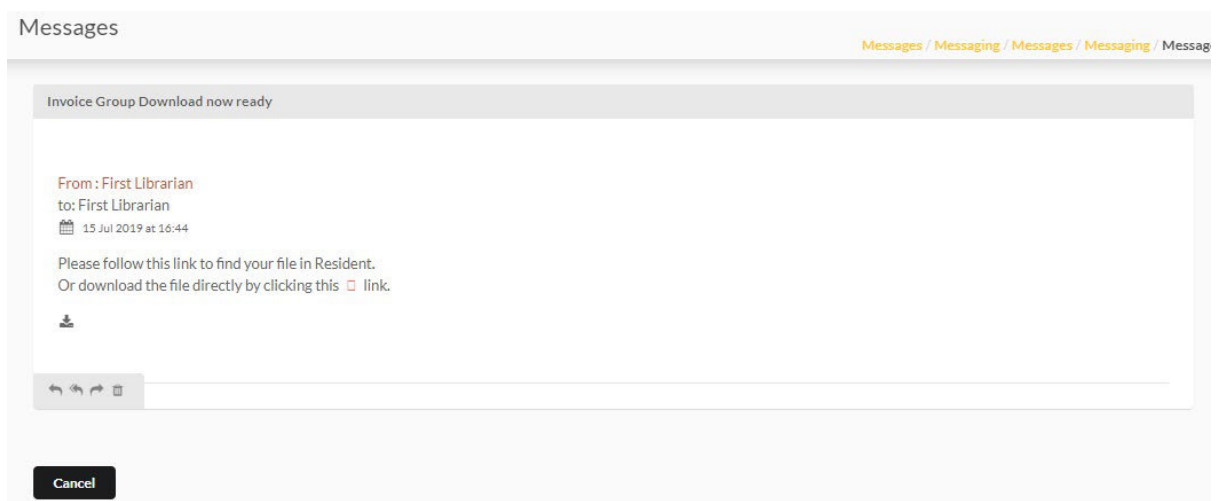
As it states, we may attach a file by clicking on the box and choosing a document from a folder on our computer or by dragging a file into this box and dropping it there. As the box also states please also ensure that the files attached to not exceed 20mb (this is quite large so this should not be a problem for most users).


Once we have completed this we can now click 'Send' to send out this message or 'Cancel' to go back.

To open one of our incoming messages we can click on the 'Action' icon for the message as shown here.



This will then open our message up and we will be able to see all details for this message.



We will see all details from the before list but also the time received. There was also an attachment on this message. We can see this as there is a download link.  If we click this link it will download the attachment for us. At the very bottom we also have the following icons:



These icons are (from left to right):

Reply

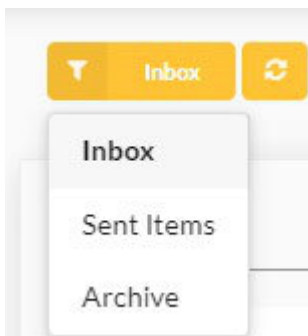
Reply to all

Forward

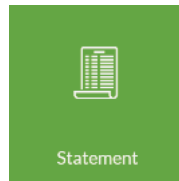
Archive (or delete if we are viewing this message from the archive)

If we choose to reply, reply to all or forward then the boxes for this will appear below our message. We need to simply fill these out as shown previously and click 'Send'

If we would like to see items that have been sent or archived by us then we need to simply click the 'Inbox' button on the top left of the 'Messaging' page. This will open up our other options as shown:



Statement



This tile will allow us to see our statement. We can see all items in our statement, the dates they were raised/are due, and our current balance.

Statement | RH-F1-1 Jane Doe & First Librarian

Dashboard / Leaseholder / Statement

Filter by Category

ALL

Download Email

| Date | Title | Reference | Demand Date | Due Date | Credit | Debit | Balance | Actions |
|-------------|--|-----------|-------------|------------|--------|------------|------------|----------|
| 19 Jul 2019 | (Invoice) Service charge for the period starting on 1 Jan 2019 to 31 Dec 20... | 001-RH-F1 | 01/01/2019 | 01/01/2019 | £ 0.00 | £ 6,600.00 | £ 6,600.00 | Download |
| 20 Jul 2019 | (Invoice) (Outstanding Amount: £ 50.00) | GR 1 | 20/07/2019 | 24/07/2019 | £ 0.00 | £ 50.00 | £ 6,650.00 | Download |
| Total | | | | | £ 0.00 | £ 6,650.00 | £ 6,650.00 | |

On this page we can filter by Category as shown below. Here you can see we have filtered by 'Ground Rent' on the drop down box at the top. This now shows all items with that category only.

Statement | RH-F1-1 Jane Doe & First Librarian

Statement / Invoice / Statement / Invoice / Statement

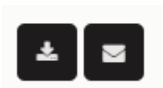
Filter by Category

Ground Rent

Download Email

| Date | Title | Reference | Demand Date | Due Date | Credit | Debit | Balance | Actions |
|-------------|---|-----------|-------------|------------|--------|---------|---------|----------|
| 20 Jul 2019 | (Invoice) (Outstanding Amount: £ 50.00) | GR 1 | 20/07/2019 | 24/07/2019 | £ 0.00 | £ 50.00 | £ 50.00 | Download |
| Total | | | | | £ 0.00 | £ 50.00 | £ 50.00 | |

We can download or send ourselves our statement using the download and email buttons:



Once clicked we can choose which date range we would like the statement to cover:

From Date No From Date ☒ To Date

Cancel or Email

To open a demand shown on the statement we can click on the eye icon.

Once open we will be able to see all details for demand items and any payments recorded against this invoice.

Invoice | 001-RH-F1 Service charge for the period starting on 1 Jan 2019 to 31 Dec 2019

Dashboard / Leaseholder / Statement / Invoice

Summary Details

Re: Flat 1 48 Mount Ephraim, Tunbridge Wells, Kent, TN4 8AU

Invoice Number: 001-RH-F1
Issue Date: 19/07/2019
Due Date: 1/1/2019

Bank Account
Service Charge Account
Account number: 00000000
Sort code: 000000

Resident House
Property Address
48 Mount Ephraim
Tunbridge Wells
TN4 8AU

Debtor Details
Jane Doe & First Librarian
JaneDoe@resident.uk.com
48 Mount Ephraim, Tunbridge Wells, Kent, TN2 3JJ

| Invoice Items | Schedule | Amount Due |
|---|----------------|------------|
| Service Charge (50% of £13,200.00 budget amount), for period 1 Jan to 31 Dec 2019 | Service Charge | £ 6,600.00 |
| Invoice Total Due | | £ 6,600.00 |

| Date | Payments | Totals |
|-------------------------|----------|------------|
| No Payments Received | | |
| Payments Received Total | | £ 0.00 |
| Amount Due | | £ 6,600.00 |

Cancel More Actions

If we switch to the 'Details' tab we will be able to see more details about this demand such as issue/due date and category.

Invoice | 001-RH-F1 Service charge for the period starting on 1 Jan 2019 to 31 Dec 2019

Dashboard / Leaseholder / Statement / Invoice

Summary Details

Unit *
RH-F1 Flat 1

Owner(s) *
Jane Doe & First Librarian

Issue Date *
19/07/2019

Due Date
01/01/2019

Category *
3454 Service Charge

Invoice Reference(s) occurrence(s) *
001-RH-F1

Invoice Description
Service charge for the period starting on 1 Jan 2019 to 31 Dec 2019

Bank Account *
Service Charge Account (default)

Period Start *
01/01/2019

Period End *
31/12/2019

Cancel More Actions

If we would like to send this demand to ourselves or download it we need to simply click 'More Actions' and select the correct option as shown below:

Cancel More Actions

CHOOSE YOUR ACTION

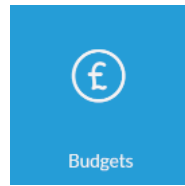
Service charge for the period starting on 1 Jan 2019 to 31 Dec 2019

Send

Download

Delete

Budgets



Using this tile we can see all budgets raised including our units. We can see budgets that are in draft and approved.

Budgets | RH Resident House Dashboard / Leaseholder / Budgets

Draft Budgets

| Budget Summary | Financial Period | Total Amount | Actions |
|---------------------|------------------|--------------|---------|
| No items to display | | | |

Approved Budgets

| Budget Summary | Financial Period | Amount | Outstanding | Periods | Periods Invoiced | Actions |
|----------------------------|------------------------------|-------------|-------------|---------|------------------|---------|
| Jan 2019 / Dec 2019 Budget | 2019 - 2020 Financial Period | £ 13,200.00 | £ 13,200.00 | 1 | 1 | |

If we want to open a budget we simply need to click the 'Action' button.



Here we can see all of the details for the budget.

Details | Jan 2019 / Dec 2019 Budget Dashboard / Leaseholder / Budgets / Details

Details | Amounts | Totals Per Unit

Budget Name * Jan 2019 / Dec 2019 Budget Custom Id * Custom ID

Financial Period * 2019 - 2020 Financial Period Invoice Item Description * Schedule Name, Proportion and Period

Invoice Frequency * Annually Bank Account * Service Charge Account (default)

Schedules

☒ Service Charge

Totals

| Schedule | Total |
|-----------------------|-------------|
| Service Charge Amount | £ 13,200.00 |
| Total | £ 13,200.00 |

Cancel More Actions

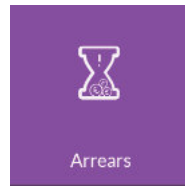
If we would like to download the budget we can select 'More Actions' and select 'Download PDF'

Cancel More Actions

CHOOSE YOUR ACTION

- Re-Open
- Delete
- Download PDF

Arrears



This tile allows us to keep track of arrears. Once we have opened this page we can see how many arrears we have any at what stage they are.

RBMS Resident Block Management Software | RH Resident House


Arrears | RH Resident House

Dashboard / Leaseholder / Arrears / Leaseholder / Arrears

Process Not Started 1 | Arrears Due | Arrears In Progress | Settled

Search

| Unit Name | Debtor Name | Type | Current Amount |
|--------------|--|---------------------|----------------|
| RH-F1 Flat 1 | RH-F1-1 RH-F1-1 Jane Doe & First Librarian | 3454 Service Charge | £ 6,600.00 |

If we would like to see more details about any arrears that have been chased we need to simply click the 'Action' button.  This will bring up a full record of every stage of the arrears process, the date it was sent and due. We can also download the letter from Resident by clicking the download button.

Arrears

Dashboard / 28345b6b-7c5f-401c-8086-fb28263b637e



Debtor Details

Jon Long & Clare Barr (Flat 1)

Arrears Details

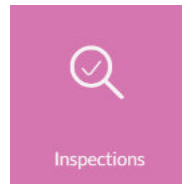
Category: Service Charge Initial Amount: £ 825.77 Current Amount: £ 1,075.77

Steps

| Step Name | Due Date | Correspondence Status |
|------------------------|----------------|---|
| Step 1 - First Letter | 15/07/2019 | Contacted by Email |
| Submitted By | Submitted Date | Actions |
| Katharine Edwards | 01/07/2019 |  |
| Step Name | Due Date | Correspondence Status |
| Step 2 - Second Letter | 04/08/2019 | Contacted by Email |
| Submitted By | Submitted Date | Actions |
| Katharine Edwards | 21/07/2019 |  |

Cancel

Inspections



This tile allows us to see details uploaded by agents regarding inspections. The first page gives us a list of assessment categories we currently have and any details about previous and upcoming reports.

Assessments | AC Arundel Castle Dashboard / Leaseholder / Assessments / Utilities / Assessments

| Order by | Sort | Per page | Search |
|----------|------|----------|--------|
| Report | Asc | 25 | |

| Report | Last Report By | Last Report Date | Next Report By | Next Report Date | Actions |
|--|----------------|------------------|----------------|------------------|---------|
| 1 Test Health and Safety(Health & Safety) | | | | | |
| 123(Banking) | | | | | |
| Asbestos Risk Management(Health & Safety) | | | | | |
| Fire Risk Assessment(Health & Safety) | | | | | |
| Health and Safety Risk Assessment(Health & Safety) | | | | | |
| Inspection Reports(Inspection Reports) | | | | | |
| Legionella Risk Assessment(Health & Safety) | | | | | |
| Lift Maintenance Contract(Mechanical & Electrical) | | | | | |

If we open a category we will be able to see any invoices raised in relation to this and any files uploaded by agents.

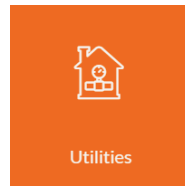
RESIDENT[®] | Silent Towers | AC Arundel Castle Dashboard / Files

Outstanding Invoic...

Files **1**

| Attachments |
|---|
| <p>Current Attachments</p> <p>21/07/2019 18:13 - Fire Risk Assessment.docx</p> <p>Download Delete</p> |

Utilities



This tile allows us to see details uploaded by agents regarding utilities. The first page gives us a list of utility categories we currently have and any details regarding tasks, notes and files made in regards to these.

Silent Towers | AC Arundel Castle

Utilities | AC Arundel Castle

Category

Utility Bills

| Category | Open Tasks | Tasks Due | Notes | Files | Actions |
|----------------------|------------|-----------|-------|-------|---------|
| Electricity Bills | 0 | 0 | 0 | 0 | |
| Gas Bills | 0 | 0 | 0 | 0 | |
| Water Bills - Supply | 0 | 0 | 0 | 0 | |
| Water Bills - Waste | 0 | 0 | 0 | 0 | |

If we open a category we will be able to see any invoices raised in relation to this and any files uploaded by agents.

We will also be able to see any meter readings made and the date they were last recorded.

Silent Towers | AC Arundel Castle

Meters Electricity Bills | Electricity Bills

Dashboard / Utilities / Utilities / Meters

Order by: Serial Number | Sort: Desc | Per page: 25 | Search:


| Serial Number | Property Name | Main Meter | Last Reading | Last Recharge Date | Current Contract | Actions |
|---------------|----------------|------------|--------------|--------------------|------------------|---------|
| 123456789 | Arundel Castle | 123456789 | 21/07/2019 | | | |

Here, we can also submit a meter reading by clicking on the plus button and filling out the pop-up box.

Meter Reading


Reading Date *

21/07/2019



Type *

Estimate



Day Rate *

Night Rate

Other Rate

Cancel

or

Create

Insurance



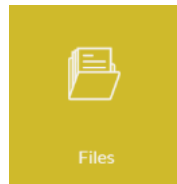
This tile allows us to see details uploaded by agents regarding Insurance. The first page gives us a list of Insurance categories we currently have and any details regarding tasks, notes and files made in regards to these.

| Insurance AC Arundel Castle | | Dashboard / Leaseholder / Insurance | | | |
|---|------------|-------------------------------------|-------|-------|---------|
| Category | Open Tasks | Tasks Due | Notes | Files | Actions |
| All Risks, Directors & Officers Insurance | 0 | 0 | 0 | 0 | |
| Boiler & Tank Insurance | 0 | 0 | 0 | 0 | |
| Building Insurance | 0 | 0 | 0 | 0 | |

If we open a category we will be able to see any invoices raised and paid in relation to this and any files uploaded by agents.

| <div>RESIDENT</div> <div>Outstanding Invoic...</div> <div>Paid Invoices List</div> <div>Files</div> | Outstanding Invoices All Risks, Directors & Officers Insurance All Risks, Directors & Officers Insurance | | | | | |
|---|--|-----------|--------------|-------------|-------------|---------|
| | Dashboard / Insurance / Utilities / Outstanding Invoices List | | | | | |
| | Order by | Sort | Per page | Search | | |
| | Category | Asc | 25 | | | |
| Category | Contractor | Reference | Invoice Date | Payment Due | Outstanding | Actions |
| No items to display | | | | | | |

Files



This tile allows us to see and download any files uploaded to our block by agents.

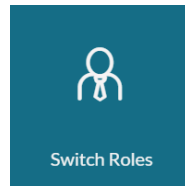
Files | AC Arundel Castle Dashboard / Leaseholder / Files

Attachments

Current Attachments

| | | |
|--|----------|--------|
| 15/07/2019 10:05 - Arundel Castle All statements 7152019 100418 AM.pdf | Download | Delete |
| 15/07/2019 10:00 - Arundel Castle All statements 7152019 95935 AM.pdf | Download | Delete |
| 15/07/2019 09:05 - Arundel Castle All statements 7152019 90403 AM.pdf | Download | Delete |
| 11/07/2019 14:03 - Arundel Castle All statements 7112019 20229 PM.pdf | Download | Delete |
| 11/07/2019 13:41 - Arundel Castle All statements 7112019 14059 PM.pdf | Download | Delete |
| 26/06/2019 16:27 - Arundel Castle All statements 26.06.2019 162705.pdf | Download | Delete |
| 26/06/2019 14:55 - Arundel Castle All statements 26.06.2019 145501.pdf | Download | Delete |
| 05/04/2019 12:30 - Mail Merge Letter Codes.txt | Download | Delete |
| 05/04/2019 12:25 - Mail_Merge_Residents_General_Letter.docx | Download | Delete |
| 05/04/2019 12:25 - DSC_0069.JPG | Download | Delete |

Switch Roles



This tile allows us to switch to any other roles we might have within Resident. For example if we are a Leaseholder in one block but a Director in another.