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SALES | LETTINGS | BLOCK MANAGEMENT



LEASEHOLDER DASHBOARD MANUAL

WWW.RESIDENT.UK.COM



Contents

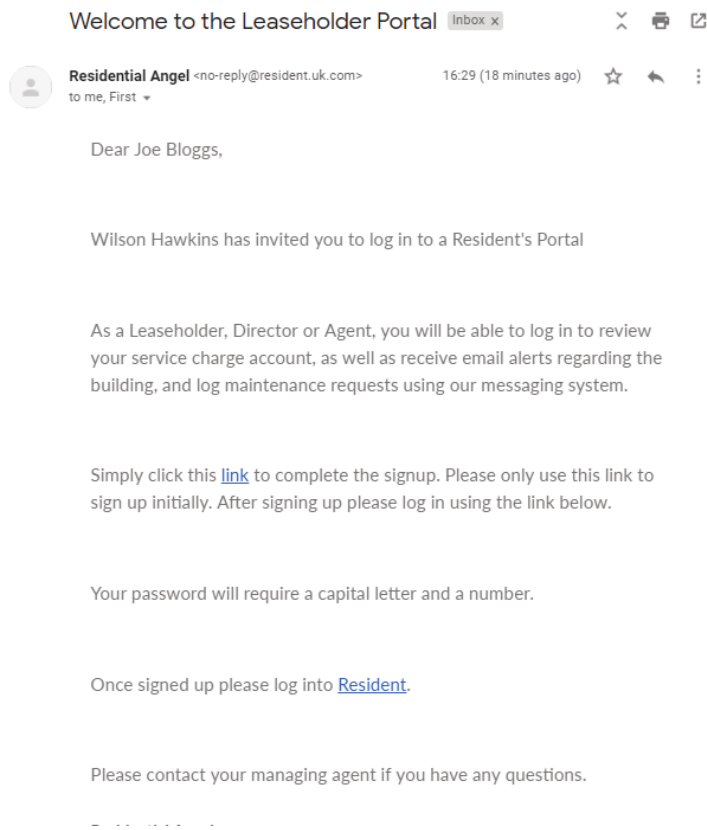
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This manual aims to show you how to use the Leaseholder portal. Please keep in mind all content below is presented using default configuration of access. If your agent has adjusted it you might have either more or less sections you can access. For 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 an "Email address" field with the placeholder "Your email address", a "Password" field with the placeholder "Your password", and a "Sign up" button with a lock icon. To the right, under "Login with", there are five buttons: Facebook, Google, Twitter, Windows, and LinkedIn. An "OR" separator is placed between the email/password fields and the social login buttons. 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.

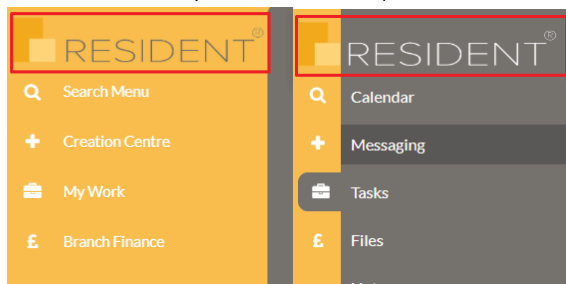
Below is an example of how our dashboard will look once we are signed in:



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:



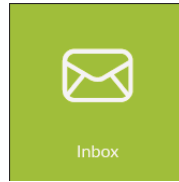
or our agency logo from any location. This logo can be found on the very top left as shown here (please note that the logo will be your own agency logo rather than the Resident logo and the menu colours are likely to be different):



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' interface. At the top right, there is a breadcrumb trail: 'Dashboard / Leaseholder / Messaging / Messages'. Below this is the 'Recipients' section, which has two dropdown menus: 'Users Group' (set to 'AC Arundel Castle') and 'Contacts' (containing 'First Librarian (Director)' and 'Alex (Branch Administrator)'). Below the recipients is the 'Compose Email' section. It has a 'Subject' field with 'Meeting' and a 'Body of Message' field 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 leaky roof with a 'Remove file' button. At the bottom of the form 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).

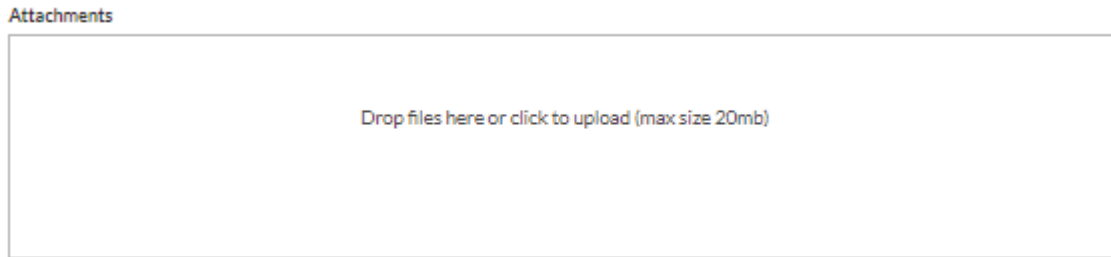
Contacts: Here we must choose the people we would like the message to be send to. These stack so we can choose more than one person and they will create a list within the box as shown. To remove a person added accidentally, or if we change our mind, we can click on the X next to their name in the 'Contacts'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



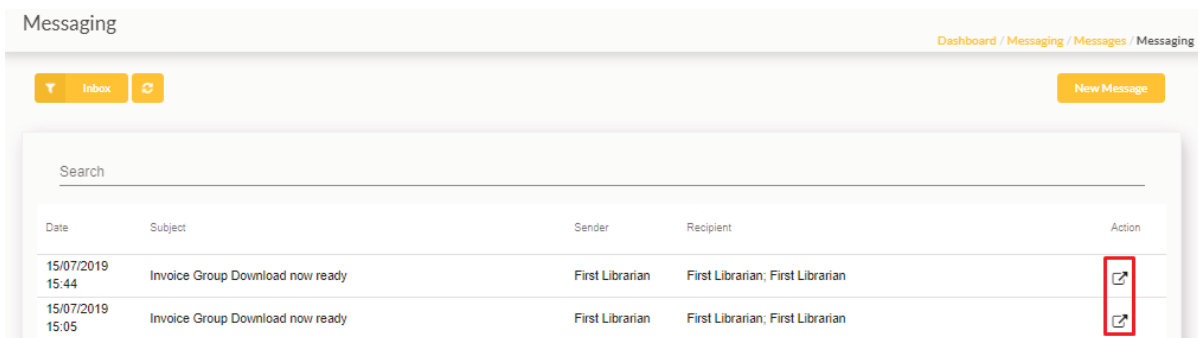
Attachments: This is optional. We may want to attach a file just as we would an email. When the 'Attachments' box is empty it will look as shown below.



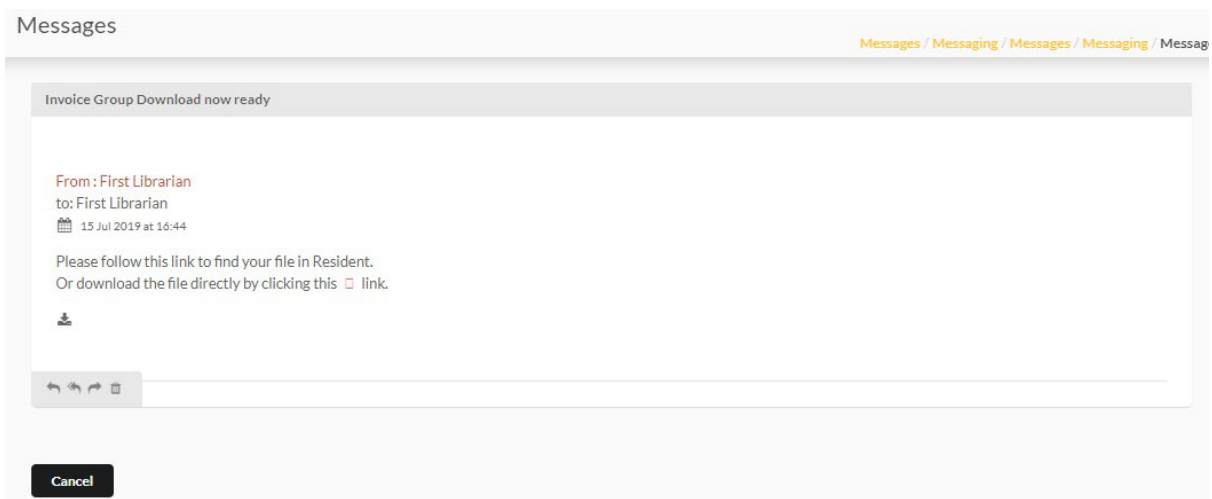
As it states, we may attach a file by clicking on the box and choosing a document from a folder on our computer or by dragging a file into this box and dropping it there. As the box also states please also ensure that the files attached to not exceed 20mb (this is quite large so this should not be a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

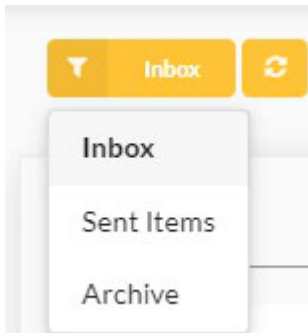
Reply to all

Forward

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

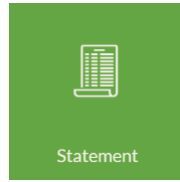
If we choose to reply, reply to all or forward then the boxes for this will appear below our message. We need to simply fill these out as shown previously and click 'Send'

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

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	
20 Jul 2019	(Invoice) (Outstanding Amount: £ 50.00)	GR 1	20/07/2019	24/07/2019	£ 0.00	£ 50.00	£ 6,650.00	
Total					£ 0.00	£ 6,650.00	£ 6,650.00	

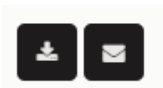
On this page we can filter by Category as shown below. Here you can see we have filtered by 'Ground Rent' on the drop down box at the top. This now shows all items with that category only.

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

Filter by Category: Ground Rent

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	
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

or



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: 19/7/2019
Due Date: 1/1/2019

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

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

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

Invoice Reference(1 occurrences) *
001-RH-F1

Cover Letter

Owner(s) *
Jane Doe & First Librarian

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

Issue Date *
19/07/2019

Due Date
01/01/2019

Category *
3454 Service Charge

Bank Account *
Service Charge Account (default)

Define Period

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

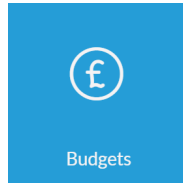
CHOOSE YOUR ACTION

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 * Custom Id *

Financial Period * Invoice Item Description *

Invoice Frequency * Bank Account

Schedules

Service Charge

Totals

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

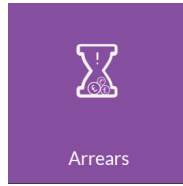
If we would like to download the budget we can select 'More Actions' and select 'Download PDF'

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

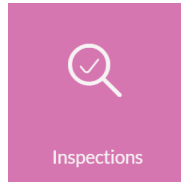
Step Name	Due Date	Correspondence Status
Step 1 - First Letter	15/07/2019	Contacted by Email
Submitted By	Submitted Date	Actions
Katharine Edwards	01/07/2019	

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 🏠 ⓘ 😊 🛠️ 🎓 🔌

Outstanding Invoic...

Files **1**

Files Fire Risk Assessment | Fire Risk Assessment

Dashboard / Files

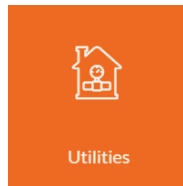
Attachments

Current Attachments

21/07/2019 18:13 - Fire Risk Assessment.docx	Download	Delete
--	----------	--------



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

RESIDENT[®]

Meters

Outstanding Invoic...

Files


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.

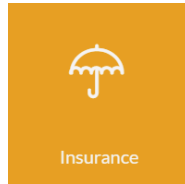
Meter Reading

Reading Date *  Type *

Day Rate * Night Rate Other Rate



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.

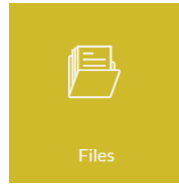
RESIDENT | Outstanding Invoices All Risks, Directors & Officers Insurance | All Risks, Directors & Officers Insurance Dashboard / Insurance / Utilities / Outstanding Invoices List

Order by: Sort: Per page: Search:

Category	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

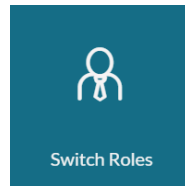
Attachments

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.



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SALES | LETTINGS | BLOCK MANAGEMENT

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East Grinstead 01342 321142 | 1 West Street, RH19 4EY

Block Management: 01892 574880 | 43 Mount Ephraim, TN4 8AA

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