Penny Realty, Inc.

PROPERTY MANAGEMENT

Owner X: Mobile and Desktop Versions

How to use this guide

This User Guide is like the User Guide we provided to you in Streamline University. This guide is worded as if you wrote it to your owner.

We created this to provide you a version to brand for your owners with an overview of their Mobile and Desktop features and basic operation.

Please follow the steps below to use this guide:

Use the Owner X Desktop Module and Mobile App course, where you will understand how to use and customize the Owner X to better suit your company's operation.

1. **Brand** this guide (the Unit Owner version) with your PMC's logo and name (replace any verbiage as needed).

2. Depending on the features you want enabled in the Owner X, you may want to **remove any additional information from this guide** before making it available to your Owners.

3. **Delete** this specific page when you are done.

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GETTING STARTED

App download and installation

The app is available for download for Apple and Android devices under the name **Owner X**.

Follow your phone's instructions to install the app.

Get in touch with us if you experience any issues during the process.

Owner desktop access

Besides managing your home through your mobile device, you may also login from a desktop by navigating to https://ownerx.streamlinevrs.com/

Logging In

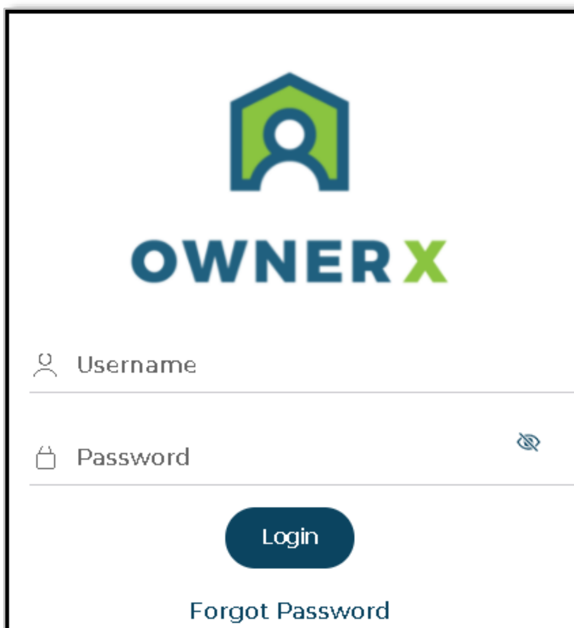


FIGURE 1: LOGIN SCREEN

The **Login Now** screen is the first screen you will see.

You will use your **Streamline Login/Username and password** to log in, as provided in the access email.

NOTE: The same user id and password will work with the Owner App and desktop access. Get in touch with us if you have any issues logging in.

DASHBOARD

The **Dashboard** is the first screen you will see after logging in.

It presents a **drop-down menu** where you can select the **Property** you want to work with as well as the **unit's management tools**.

Note: Only your **Active** units will show in this area. Reach out to us if you notice a home is missing.

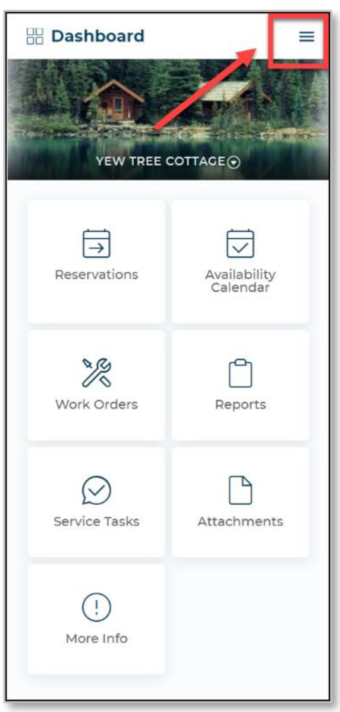


FIGURE 2: APP VIEW

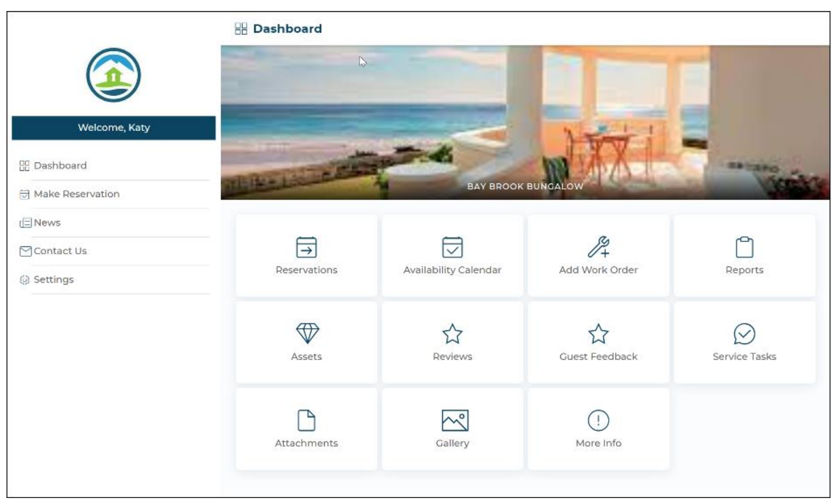


FIGURE 3: DESKTOP MODULE VIEW

1. View your **Reservations** for the unit's
2. Check and block that unit. **Availability Calendar**.

3. View and add **Work Orders**.
4. Access some unit **Reports**.
5. View any attachments added to the unit
6. View and add unit **Service Task**.

Note: Not all the management tools shown above may be available, as these depend on our system setup. Reach out to us if you have any questions.

In the App, clicking on the Menu icon on any of the screens will open the Main Menu:

Dashboard Menu Options

Reservations

In this area you will be able to view reservations and modify or cancel your future **Reservations**.

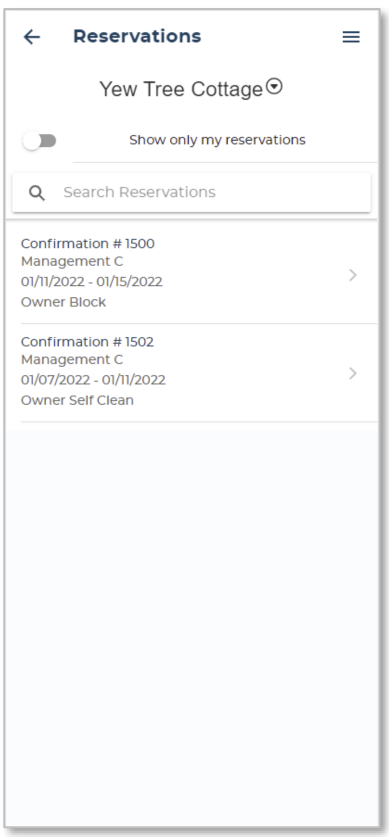


FIGURE 4: DASHBOARD RESERVATIONS

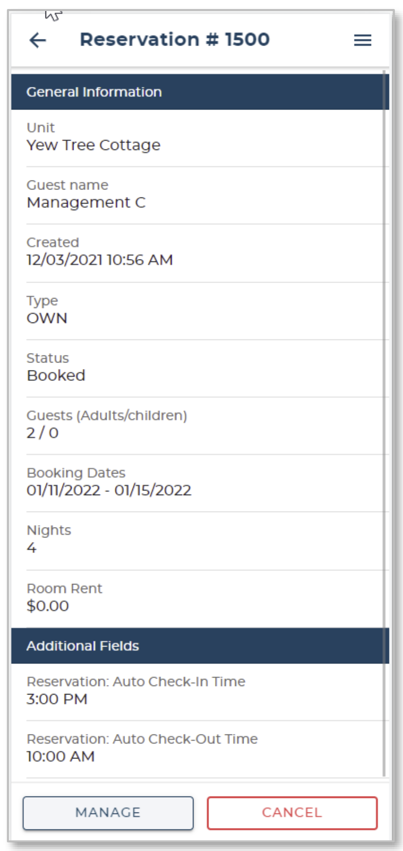


FIGURE 5: RESERVATION DETAILS

Availability Calendar

Use the Availability Calendar to easily view the unit's availability, make reservations or create Owner Blocks. This interactive calendar with simple data gathering process enables easy unit management.

You can scroll through monthly calendars to view the unit's occupancy.

Steps to make Reservation

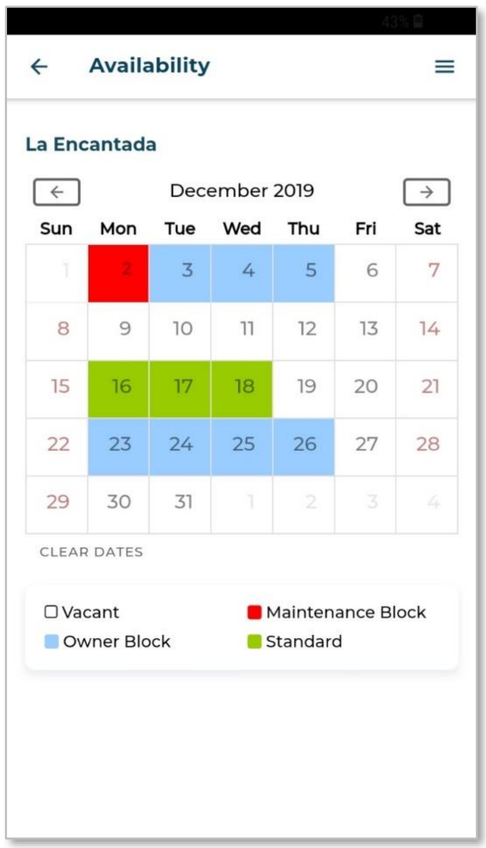


FIGURE 6: AVAILABILITY CALENDAR

1. Select the reservation type.
2. Select [**Check In**]. and [**Check Out**] dates in the Calendar.
3. Enter the remaining reservation information.
4. Select [**Make Reservation**]
5. View confirmation screen

•

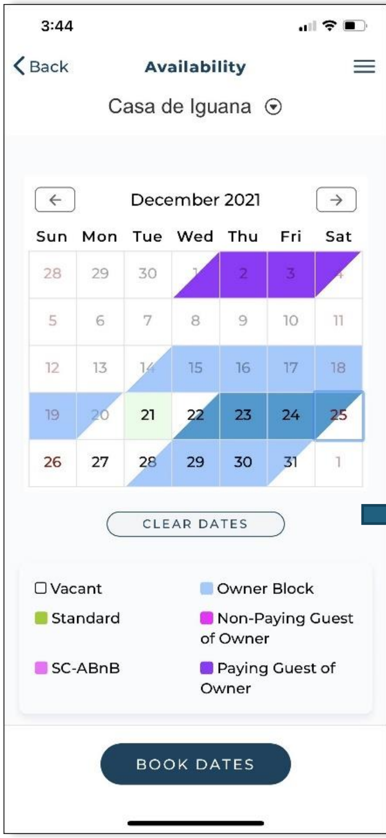


FIGURE 7: CHECK-IN AND CHECK-OUT DATES

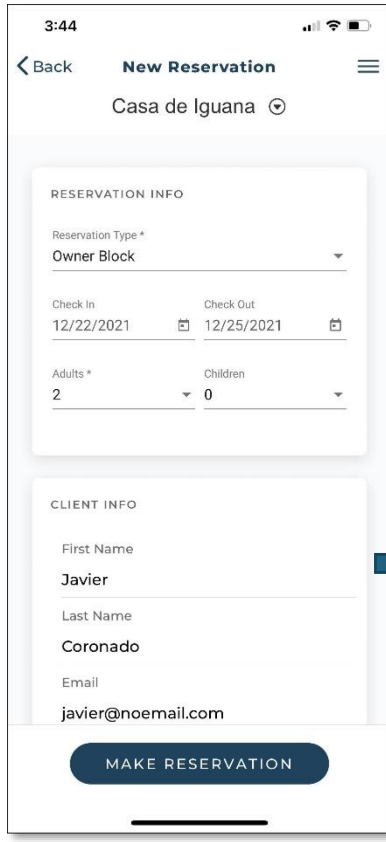


FIGURE 8: RESERVATION DETAILS

FIGURE 9: CONFIRM RESERVATION

Work Orders

In this area, you will be able to view the unit's **Work Orders** as well as add new ones:

The unit's Work Orders will be sorted in **Pending, Active** and **Completed** status.
The main view will be **Active**. Work Orders marked as **Critical** will be positioned at the **top** of the list.

Note: You will **not** be able to modify the unit's Work Orders from this screen. Once added, work orders will be “closed” to modification.

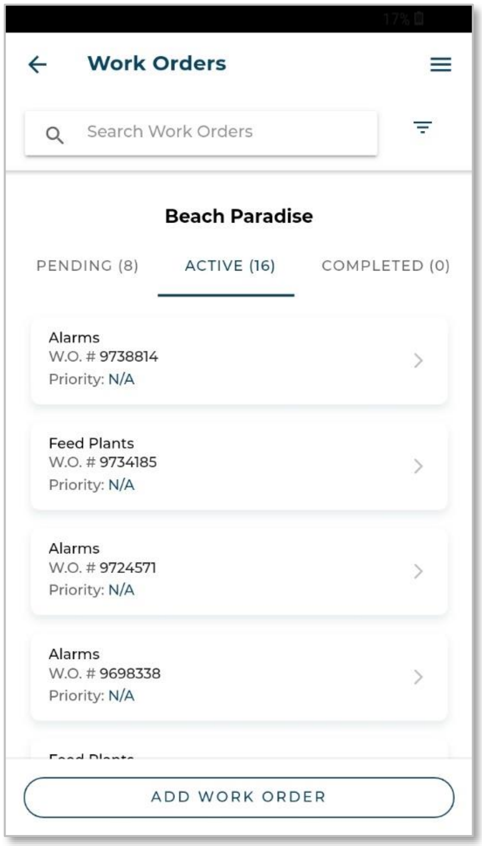


FIGURE 10: WORK ORDERS

Add Work Order

You can also add work orders.

The process to **Add a Work Order** is simple (**Figures 11 – 16**)

1. Enter a **Title.**
2. Select a **Priority.**
3. Enter a **Description.**
4. Add photos if required.
5. Select [**Create Work Order**] and confirm.

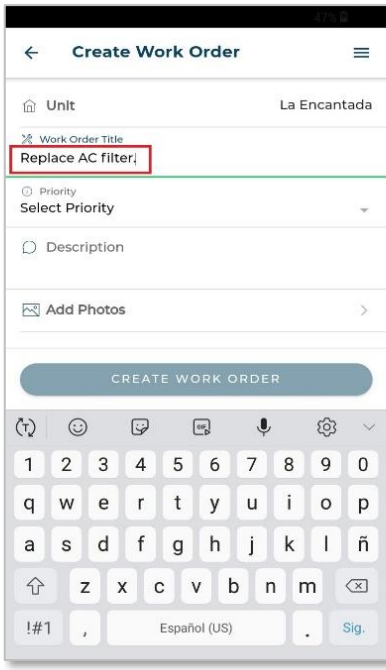


FIGURE 11: ENTER TITLE

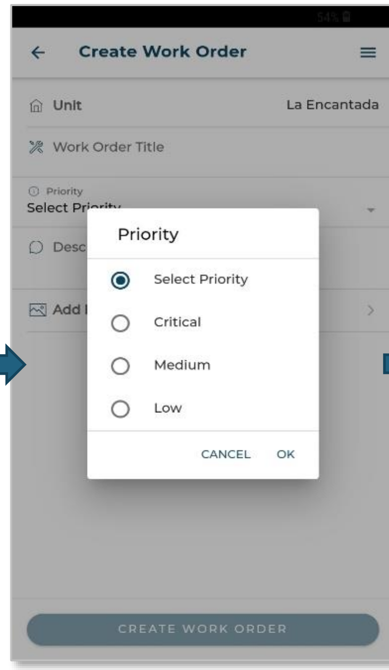


FIGURE 12: SELECT PRIORITY

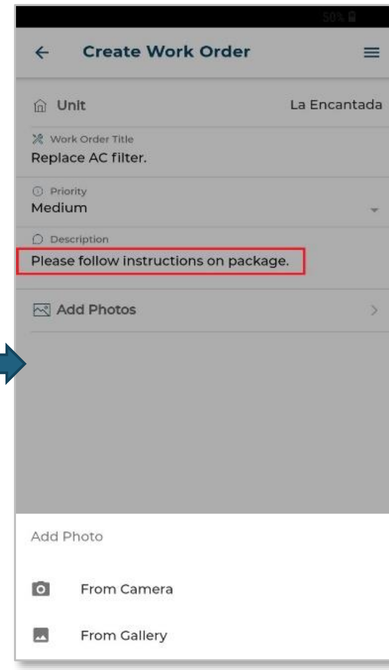


FIGURE 13: ADD DESCRIPTION

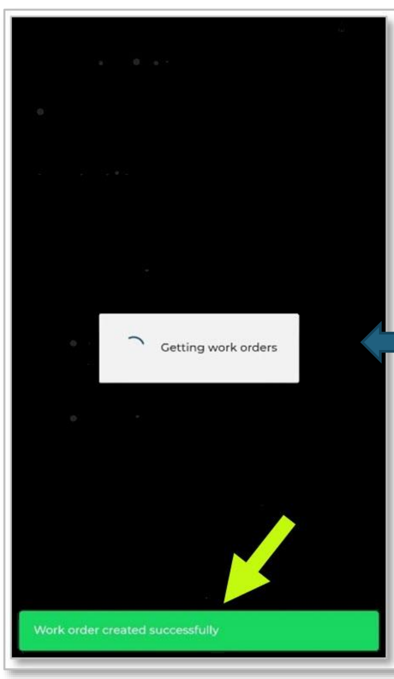


FIGURE 146: VIEW CONFIRMATION

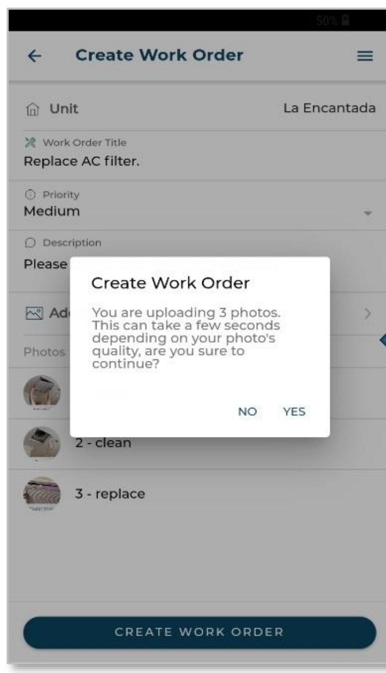


FIGURE 15: CONFIRM DETAILS

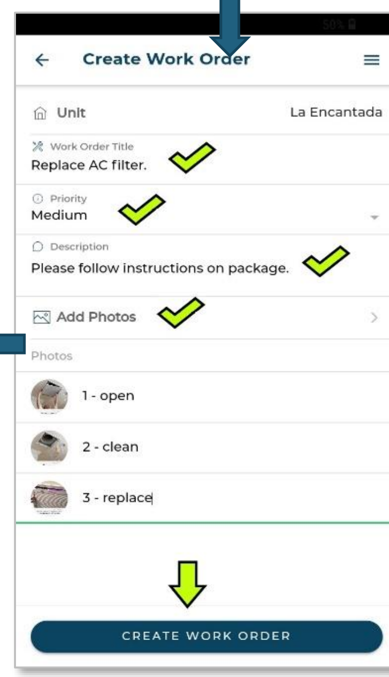


FIGURE 14: CREATE WORK ORDER

Reports

By accessing the **Reports** area, you will have access to the following:

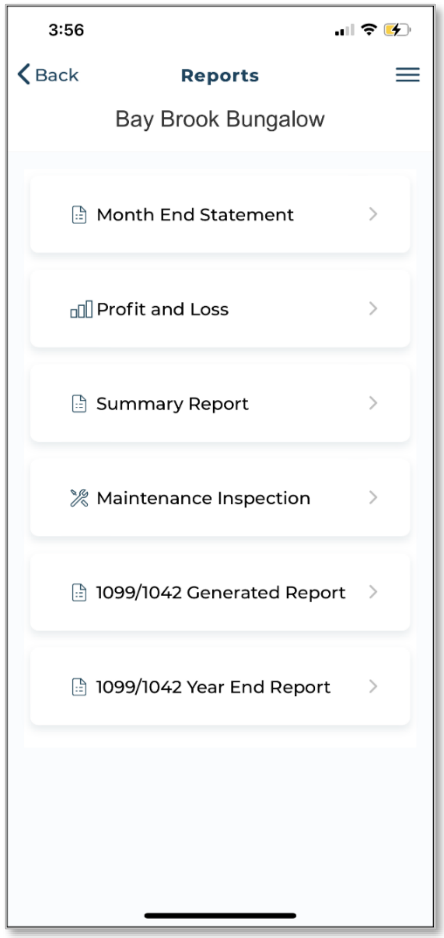
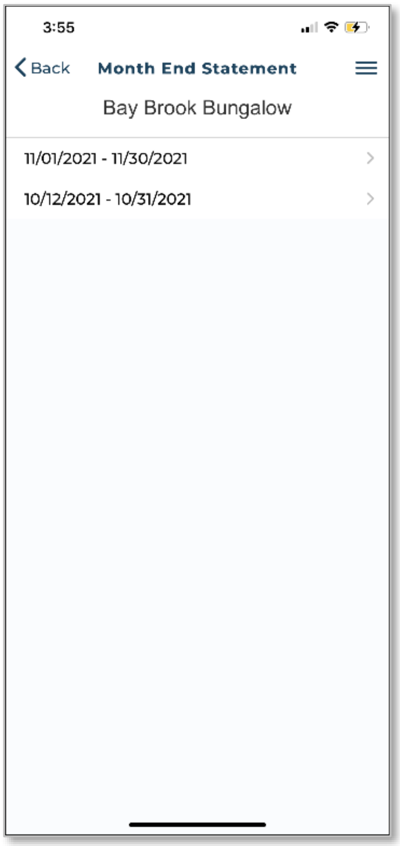


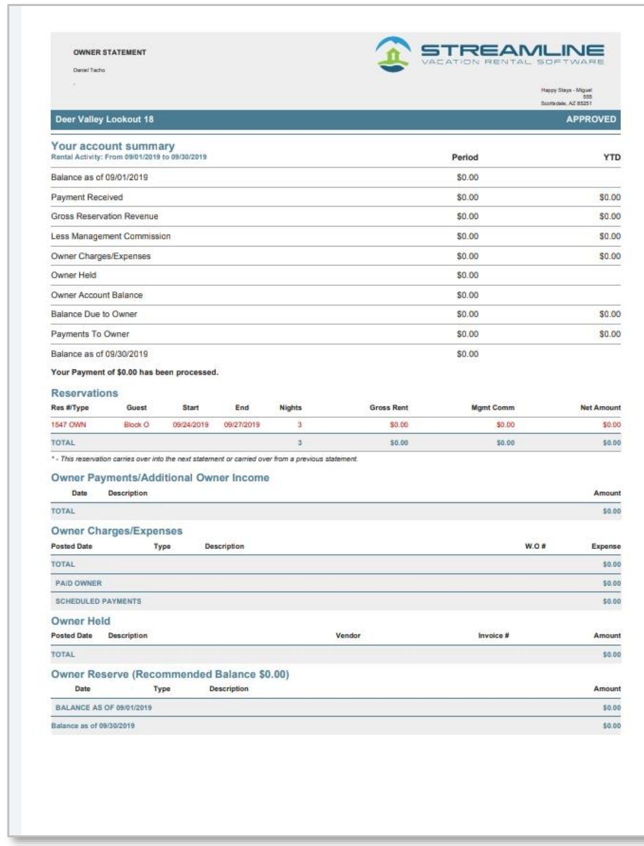
FIGURE 16: REPORTS MENU

Note: The Month End Statement will always show in this area. Depending on our system setup, other reports may not be available.

Month End Statement

1. Selecting this tab will show all the month end statements available for the unit
2. Select a statement to view (**Figure 18 & 19**)..




OWNER STATEMENT
Daniel Tacho

STREAMLINE
VACATION RENTAL SOFTWARE

Happy Stays - Miguel
555
Scottsdale, AZ 85251

Deer Valley Lookout 18 APPROVED

Your account summary
Rental Activity: From 09/01/2019 to 09/30/2019

	Period	YTD
Balance as of 09/01/2019	$0.00	
Payment Received	$0.00	$0.00
Gross Reservation Revenue	$0.00	$0.00
Less Management Commission	$0.00	$0.00
Owner Charges/Expenses	$0.00	$0.00
Owner Held	$0.00	
Owner Account Balance	$0.00	
Balance Due to Owner	$0.00	$0.00
Payments To Owner	$0.00	$0.00
Balance as of 09/30/2019	$0.00	

Your Payment of $0.00 has been processed.

Reservations

Res #/Type	Guest	Start	End	Nights	Gross Rent	Mgmt Comm	Net Amount
1547 OWN	Block O	09/24/2019	09/27/2019	3	$0.00	$0.00	$0.00
TOTAL				3	$0.00	$0.00	$0.00

** - This reservation carries over into the next statement or carried over from a previous statement.*

Owner Payments/Additional Owner Income

Date	Description	Amount
TOTAL		$0.00

Owner Charges/Expenses

Posted Date	Type	Description	W.O #	Expense
TOTAL				$0.00
PAID OWNER				$0.00
SCHEDULED PAYMENTS				$0.00

Owner Held

Posted Date	Description	Vendor	Invoice #	Amount
TOTAL				$0.00

Owner Reserve (Recommended Balance $0.00)

Date	Type	Description	Amount
BALANCE AS OF 09/01/2019			$0.00
Balance as of 09/30/2019			$0.00

FIGURE 17: MONTH END STATEMENT SCREEN

FIGURE 18: MONTH END STATEMENT DETAILS

Profit and Loss

This report shows income and expenses by unit, by date range (**Figures 20 – 22**).

1. Select the [**Get Report**] to generate the report.
2. Select the [**Download Pdf**] to download the report in pdf format.

The report will include reservation data, gross room revenue, management commission, and the date, type, description, and amount of expenses. Also considered as Net Income.

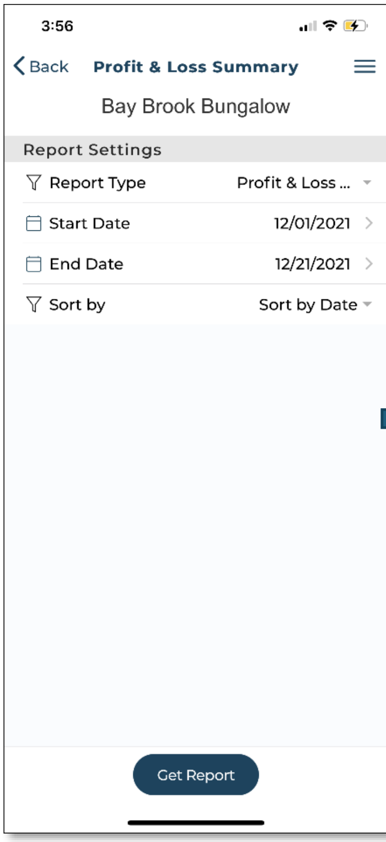


FIGURE 19: PROFIT AND LOSS SCREEN

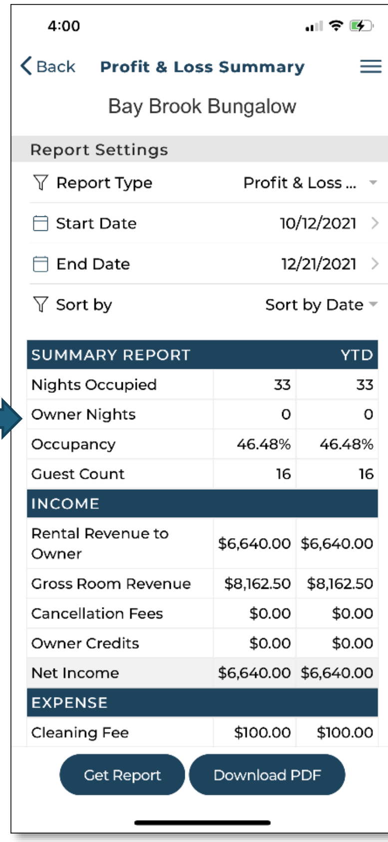


FIGURE 20: PROFIT AND LOSS SUMMARY

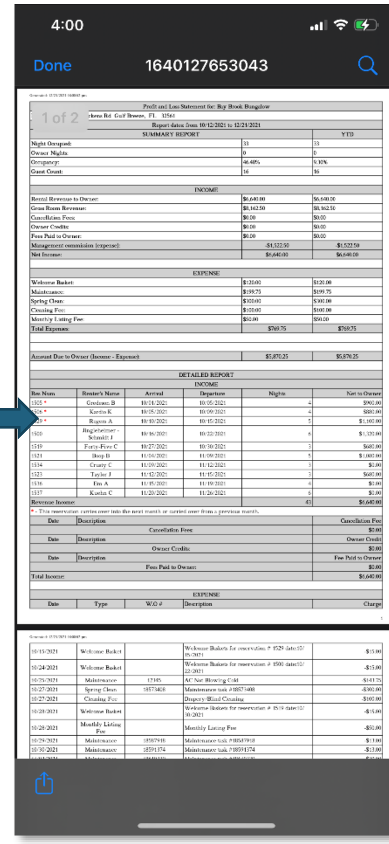


FIGURE 21: PROFIT AND LOSS REPORT

Summary Report

1. Selecting this tab will show options to generate the report.
2. Choose to generate a summary report by reservation check-in, check-out, or creation date (**Figure 24**).
3. Select the date range and [**Get Report**] (**Figure 25**).

This report will include the details of reservation type, date of arrival, number of nights, number of guests, rent, and owner commission.

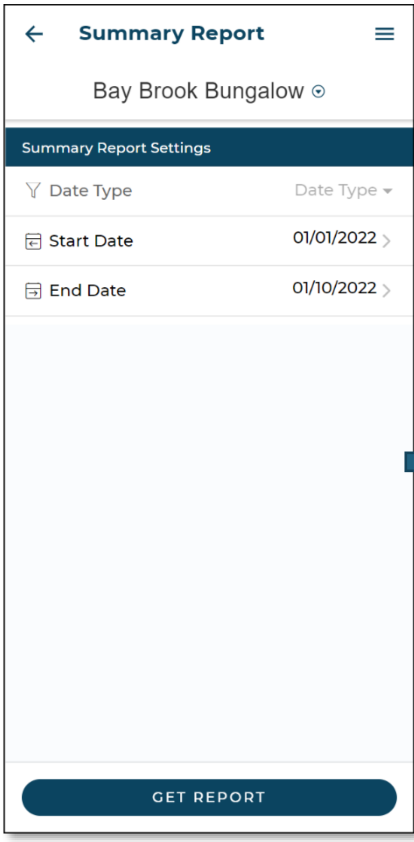


FIGURE 22: SUMMARY REPORT SCREEN

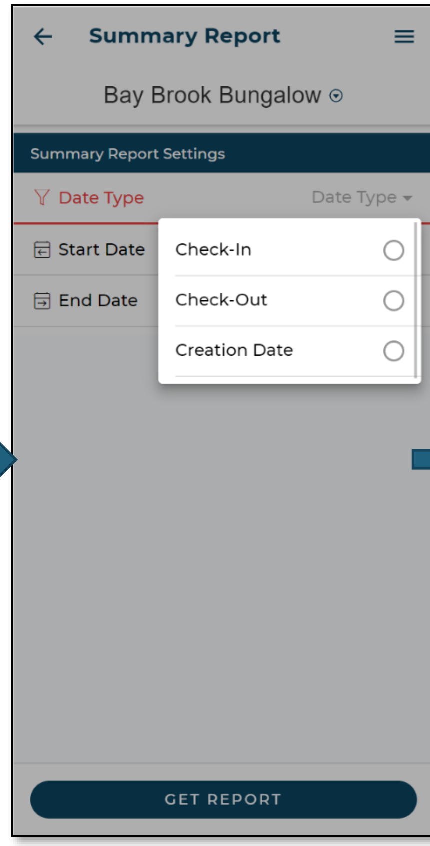


FIGURE 23: SUMMARY REPORT SETTINGS

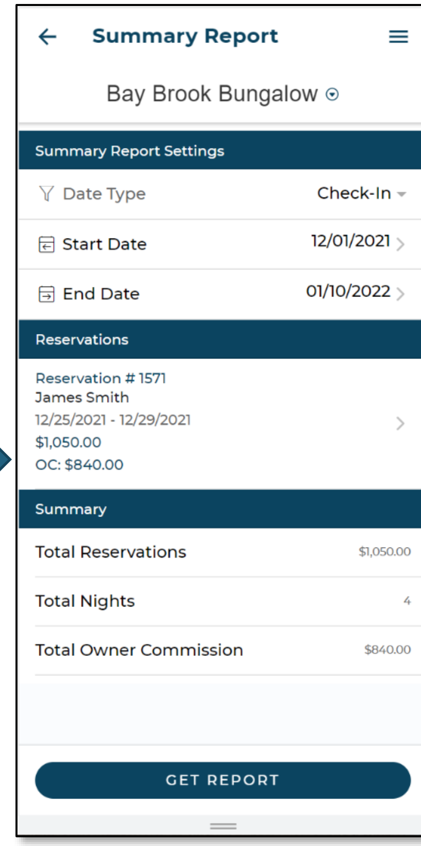


FIGURE 24: SUMMARY REPORT

Maintenance Inspection

Maintenance inspections can be generated for a specific date range.

1. Selecting [**Get Report**] will show details of maintenance inspections created within that date range for the unit (**Figure 26)**.
2. Select the download icon to generate and view the details of the maintenance inspection (**Figure 27**).

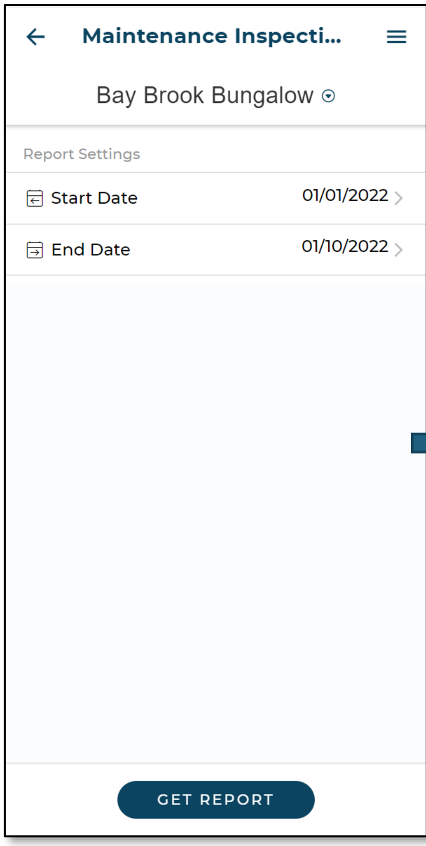


FIGURE 25: MAINTENANCE INSPECTION SCREEN

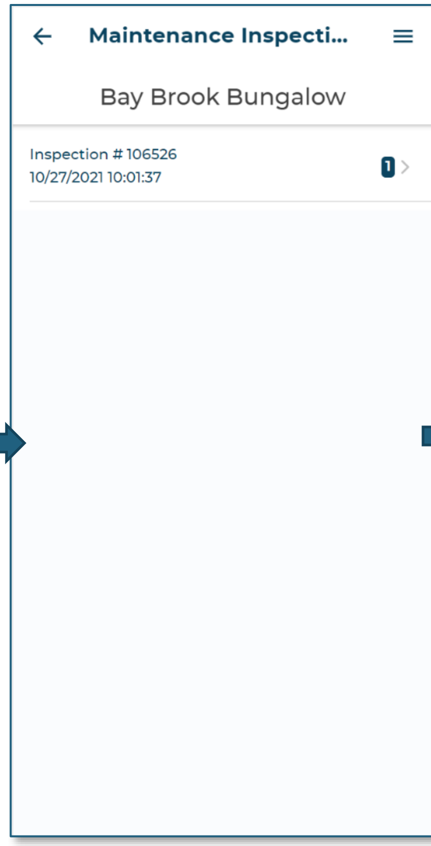


FIGURE 26: MAINTENANCE INSPECTION REPORT SUMMARY

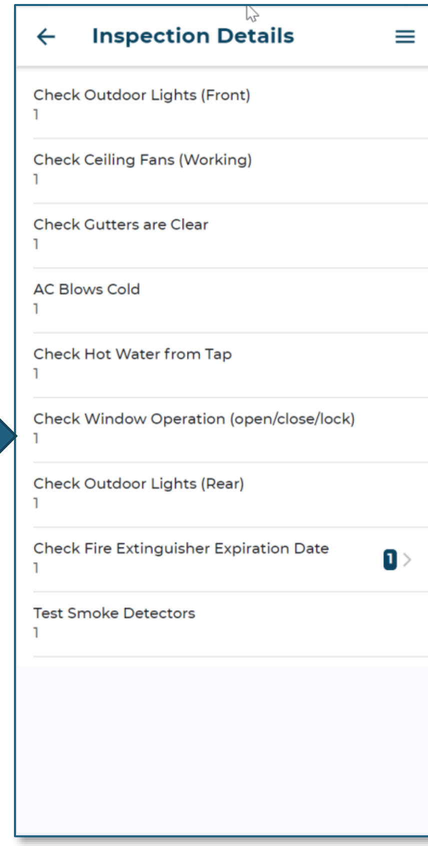


FIGURE 27: MAINTENANCE INSPECTION REPORT DETAILS

1099/1042 Generated Report

Select this tab to generate the 1099/1042 report

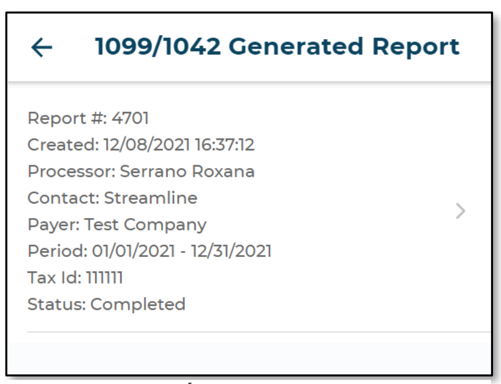


FIGURE 28: 1099/1042 GENERATED REPORT

1099/ 1042 Year End Report

Select this tab to generate the 1099/1042 year-end report.

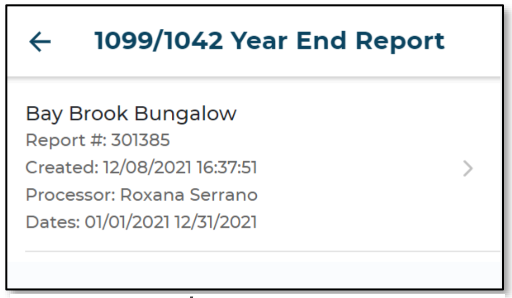


FIGURE 29: 1099/1042 YEAR-END REPORT

Service Tasks

Selecting this tab will show options to toggle and view [**Open**], [**Closed**] and [**Deleted**] (**Figure 31**) service tasks. You can also slide an Open task to choose the **Close** or **Delete** options (**Figure 32).** Slide a Closed task to choose **Activate** or **Delete** options (**Figure 33**).

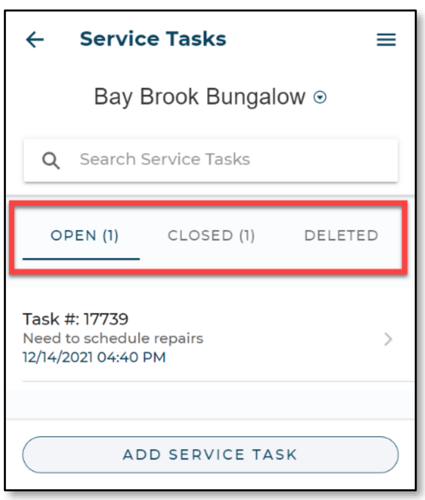


FIGURE 30: SERVICE TASKS TOGGLE OPTIONS

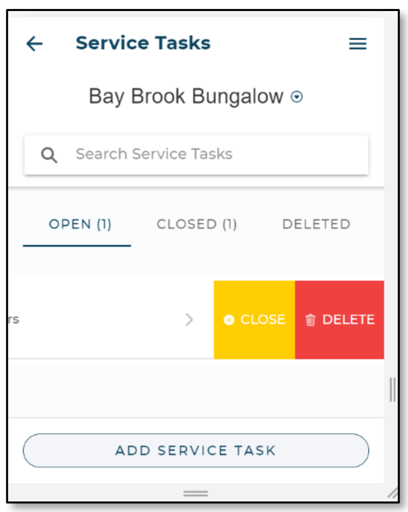


FIGURE 31: OPEN TASKS SLIDE OPTIONS

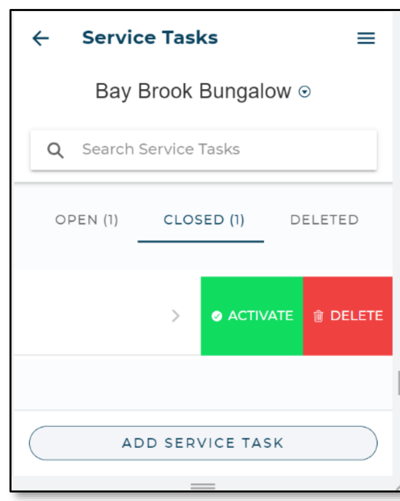


FIGURE 32: CLOSED TASKS SLIDE OPTIONS

Steps to Communicate with PMC for a Service Task

1. Select the task to view the history and details of communications with the PMC regarding this task
2. Send response using the message window at the bottom.

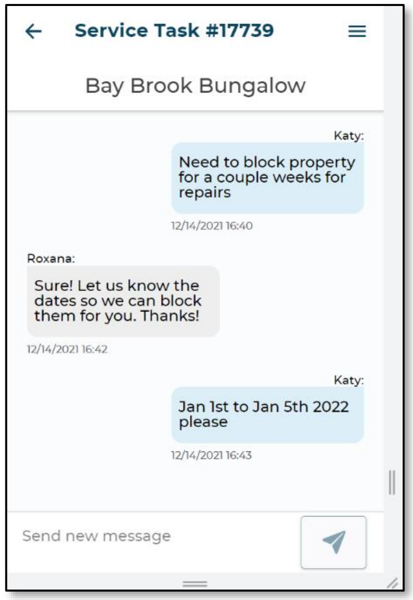


FIGURE 33: MESSAGES AND RESPONSE

Steps to Add a Service Task

1. Select the [**Add Service Task**] button (**Figure 34**)
2. Enter a Title for the task (**Figure 35**).
3. Enter a Description for the task.
4. Select [**Create Service Task**]

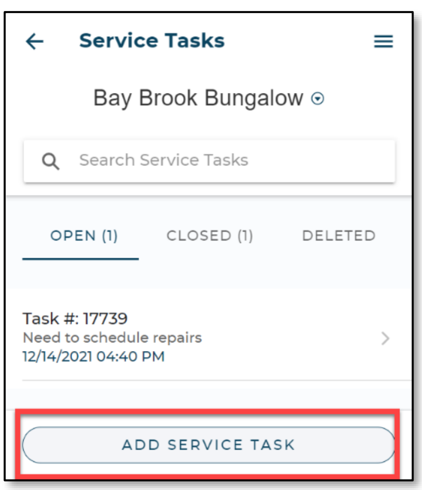


FIGURE 34: SERVICE TASK SCREEN

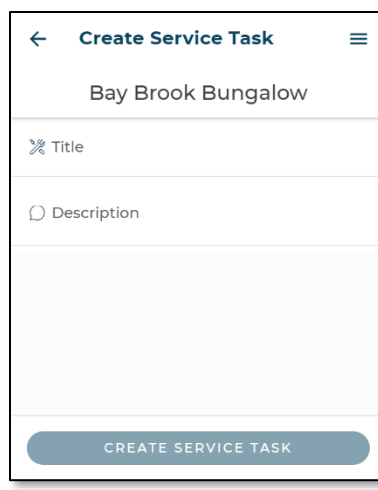


FIGURE 35: ADDING A SERVICE TASK

Attachments

This tab provides an easy method to share property documents with the PMC.

Steps to Add Attachments

1. Select the [**Add Attachment**] button
2. Select [**Add File**] to upload the document.
3. Select the [Save Attachment] to save the document.

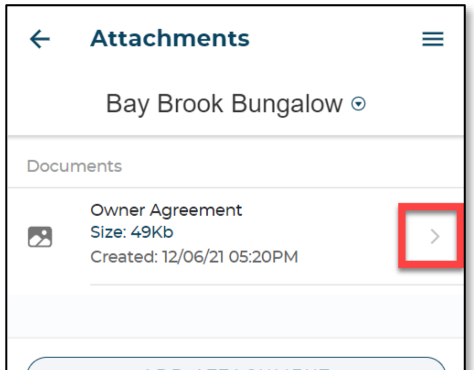


FIGURE 367: ADD ATTACHMENT BUTTON

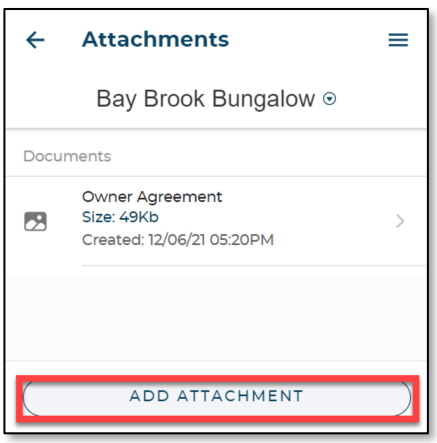


FIGURE 378: ADD ATTACHMENT SCREEN

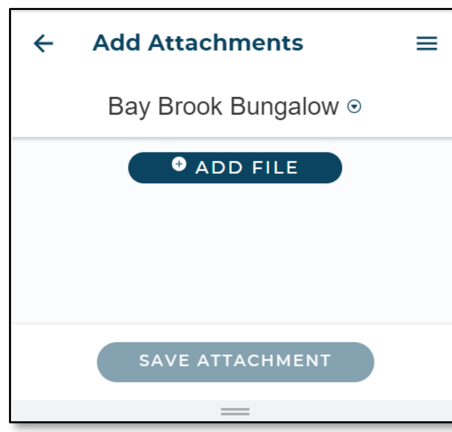


FIGURE 389: UPLOAD FILE

Steps to Download Attachments

1. Select the arrow [>] next to the document details.
2. Save the document.

More info

The **More Info** area presents an overview of the unit's enabled **Additional Property Fields**.

MAKE RESERVATION

This option follows the same steps as provided under the section **Steps to make Reservation** (CTRL + Click the highlighted text to follow the link)

NEWS

The **News** area presents important information from us.

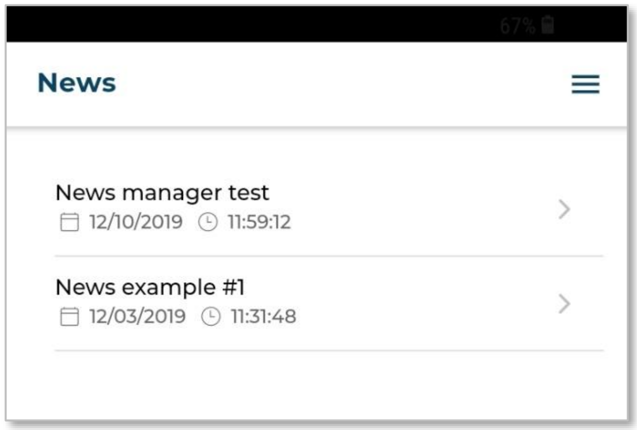


FIGURE 39: NEWS SCREEN

CONTACT US

In the **Contact Us** area you will be able to view our contact information:

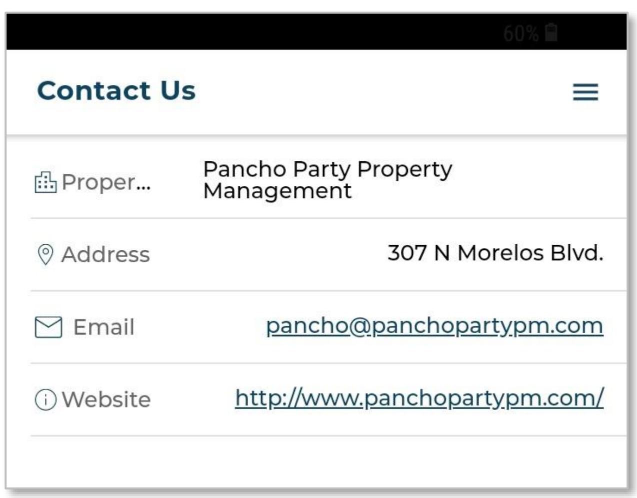


FIGURE 40: CONTACT US SCREEN

SETTINGS

In the **SETTINGS** area you will be able to view your own account information as well as **Log Out** of the App:

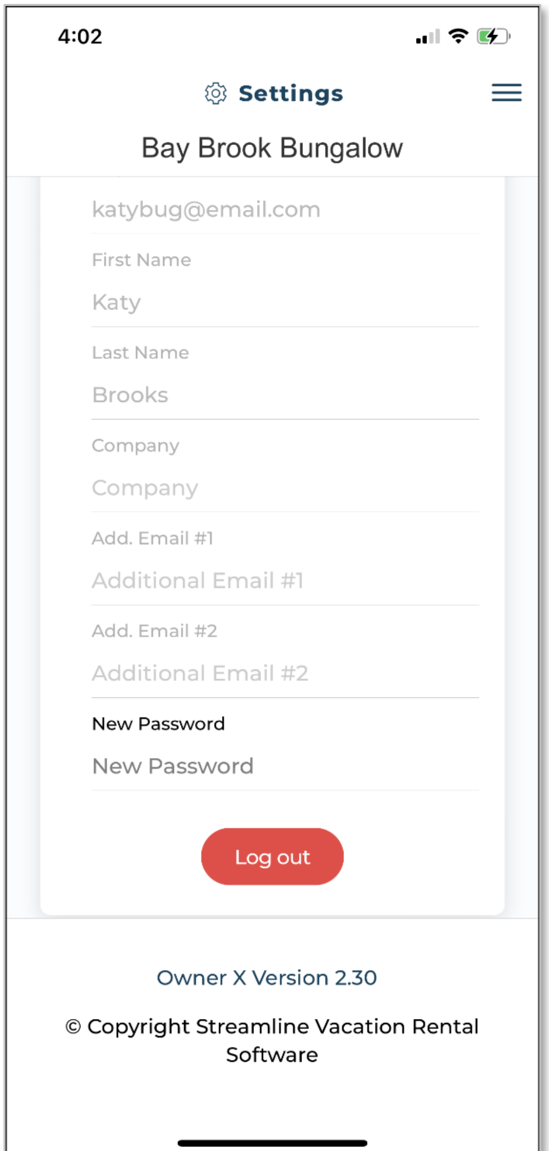


FIGURE 41: LOG OUT SCREEN

Note: Get in touch with us if you notice any information that needs to be changed.