

# Owner Portal

Rentec Direct software gives you the option to create an **Owner Portal** which allows owners to view important information concerning their portfolio.

To help you welcome your owners to their portal we offer some useful tools that can be found here: **Welcoming Owners** ([//help.rentecdirect.com/article/570-welcoming-owners](http://help.rentecdirect.com/article/570-welcoming-owners))

## Setting Up an Owner Portal

Setting up an owner portal is a quick process using the instructions below.

In your Rentec Direct account:

1. Click **Owners** from the main menu.
2. Right-click on an **Owner** and choose **Edit Owner** from the menu.
3. Enter their email address (this will be their username).
4. Check the **Enable Portal** box.

**System Note:** *If you have not clicked Enable Portal the next step will display this notice: **Password notification requires Portal Access to be enabled** prompting you to return to this step.*

5. Generate a password for the owner, by clicking on the paper-pencil icon next to where it says **Password**.

**Note:** *Owners have the ability to change this when in their portal, however, if they ever need the password reset, then you will need to do it for them on this page.*

6. A box will pop up where you can create a custom password or have the system auto-generate one for you by clicking the **circular arrows** icon.

**Important note:** *To prompt an email notice to your owner with login and password instructions, be sure to select the **Email Box** and the **Submit** button.*

7. Click **Save Changes** at the bottom or top of the page.

**System Note:** *Always make sure to **Save Changes** after creating or editing a password, enabling the portal, and adding or editing email notifications to activate those changes.*

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**Below is a sample of the auto-generated portal email:**

Your property manager has set you up with access to an online portal which gives you quick access to your information. To access the portal, click the following link:

<http://samplename.propertymanage.biz>

When asked for your username, enter your email address.  
Your password is "ZR3Tyg2f" (without the quotes).

Please change your password once logged in by visiting the settings area.

This message was generated by your property manager. If you have any questions about the property management portal, please contact your property manager.

Please do not reply to this email, the address is not monitored.

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## Additional Owner Portal Information

Beyond your custom web address, Owners can log in to their portal at this universal web address: **rentecdirect.com/login** (<https://www.rentecdirect.com/login>)

The **Owner** is then presented with these tabs:

- **Summary:** Here they will see an overview of activity and property performance.
- **Properties: Owners** can view a quick breakdown of their properties, the balance on their properties, and also the current tenant occupying that property. They also can click on the balance of any property to view the ledger.
- **Statement:** This tab gives your owners a breakdown of each transaction in the specified date range for their properties.
- **Files: Owners** will be able to view files from the **File Library** that you have chosen to share with them.
- **Reports:** The **Owner** has full control to customize standard reports by date, properties, etc. to view, save, and print.
- **Settings:** From **Settings**, an **Owner** can change their password and email address at any time.

Did this answer your question?  

