Clicking the User Management button will bring you to this screen. Reminder: Only the primary account holder for the management company has access to this button; on-site users will see the button grayed out.
The Create, Edit, & Remove On-site Managers button allows the primary account holder to designate other users to enter information into the system.
All on-site managers associated with the management company are listed.
Clicking either New or View/Update brings you to this screen where you must enter the user’s information. When finished, click Update. Please note: Once a username has been chosen, this field cannot be changed at any time.
Clicking Delete will provide you with this message. Be very sure before you click OK.
After creating the users you must assign them to the properties they manage. Each property can only have one user beyond the primary account holder assigned to it.
To assign a project, select a user from the dropdown menu, check the boxes of their properties, and click Update.
Password resets are handled exclusively by the primary account holder for your management company.
To reset a user’s password, first select a user from the dropdown menu then click Reset Password.
The Reset Locked Projects option allows the primary account holder to release/unlock all projects assigned to a particular on-site manager.
A project displays as “locked” whenever one manager is working in it and another manager tries to access the same project. When you log out, the project unlocks. If your session is terminated due to system error or power outage, for example, these projects will sometimes stay “locked.” To correct, use this screen.
Return to the main menu by clicking Home to begin learning about the Annual Owner’s Certification in the next section of this presentation.