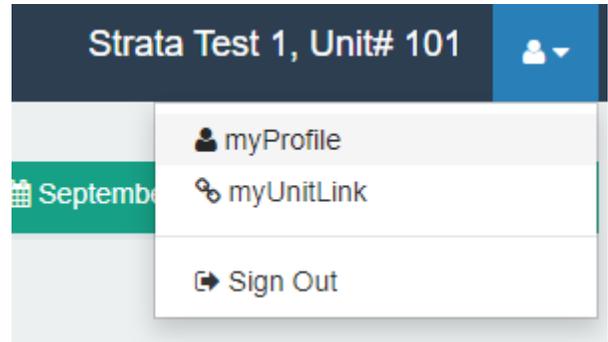OwnerLink

# My Profile – Contact Info

Contact Info, located in the myProfile area, lists all Contacts associated with the Unit Owner. Contacts can be your Rental Agents, Power of Attorney, family members or anyone associated with your unit.

In Contact Info, a Contact's: First and Last name, cell phone number, home phone number, email address (1), and Account status are displayed in a grid form. In this area, the Owners can utilize the action column where they can:

- Update an existing Contacts information
- Modify their access, and
- Grant OwnerLink access to the 'Contact'.



## Adding New Contact

To add a new Contact record:

1. Click 'New Contact'.
2. Enter Contact's First and Last Name - these fields are mandatory in order to save a new contact record.
3. Enter Email 1 – This field is mandatory in the event Contact will be required to receive email communications/notifications and access to the OwnerLink.
4. Enter any additional optional fields displayed.
5. Select the Contact Type(s) – by default every Contact record will automatically be set to 'Other'.
6. Click Submit.

# Editing Contact

Any contacts in the presented grid can be edited by the Unit Owner. When edited, the Contact record will be updated in all other OwnerLink accounts. To edit an existing contact:



1. In the action column, click the blue 'Edit Contact' button.
2. Edit required information.
3. Click Save.
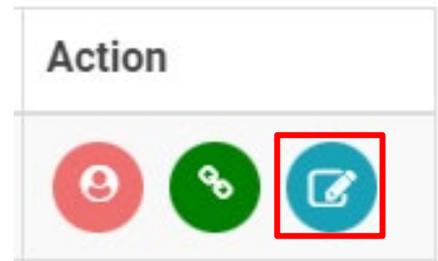
An email notification will be sent to the Unit Owner and property management when change(s) have been saved successfully.

# Assigning Contact Unit Access

Contacts, when added, will not automatically have access to any unit(s). To assign a Contact access to a unit:



1. In the action column, click the green 'Assign Contact to this Unit' button.
2. When prompted, enter the username and password of the OwnerLink account user is logged into – these credentials are the same credentials used by the Owner when logging into OwnerLink.
3. If credentials are entered correctly and accepted by OwnerLink, the green icon in the action column will automatically turn red, and the status of Contact will be updated from 'Not Assigned' to 'Unit Assigned – No Access'.
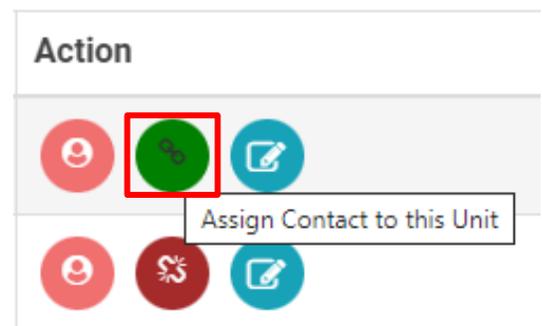
An email notification will be sent to the 'Unit Owner' and 'Contact' person to confirm that the 'Contact' has been assigned access to the unit. If the 'Contact' requires access to multiple units, the above steps will need to be completed in each unit's corresponding OwnerLink account by the Unit Owner.

# Assigning Contact Access to the OwnerLink

'Contacts' can be assigned access to the OwnerLink for any unit in which their status is set to 'Unit Assigned'. 'Contacts' without access to a unit will not be able to be granted access to the OwnerLink and must be first assigned access to the unit.

In the event a 'Contact' requires access to other units owned by their Unit Owner, the below steps must be repeated by the Unit Owner in the 'Contact Info' area for every unit.

## To grant a 'Contact' access to the OwnerLink:

1. In the action column, click the pink 'Unit Access Control' button.
2. When prompted, enter the username and password of the OwnerLink account. These are the same credentials used when logging into the OwnerLink.
3. If credentials are entered correctly and accepted by the OwnerLink, the Owner will be prompted with one of the following access options:

    a. **Grant Full Access**: (By selecting this option, you are granting full access to this OneLink account with no restrictions.)
    b. **Grant Advanced Access**: (By selecting this option, you are granting advanced access to this OneLink account with the exception of the following restrictions: (a) No access to ACH/EFT setup information and (b) online payments can only be processed via online merchant payment option and not via ACH/EFT.)
    b. **Grant Limited Access**: (By selecting this option, you are granting limited access to this OneLink account. Access to the following features will not be available as a result: Owner Ledger, ACH/EFT Setup and myPayments. This Contact will not be able to process online payments of any kind. With the exceptions to the above, this Contact will have full access to all other functions in this OwnerLink account.)
    c. **No Access** – this is the **default option** for every 'Contact' until modified by the Unit Owner.

4. Once the access level has been determined, click submit.
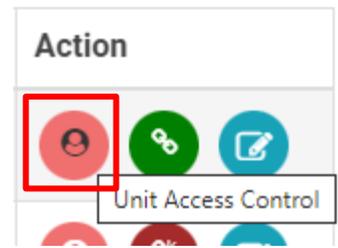
The OwnerLink access can be removed from a 'Contact' by the Unit Owner at any time by changing the Contact's access to 'No Access' in the Unit Access Control area (Pink button). When the Unit Owner removes access to a Unit (Red button) in OwnerLink, a Contact's OwnerLink access will automatically be terminated.
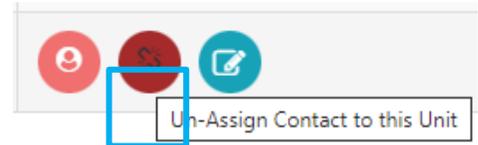
## Completing Contact OwnerLink Registration

When Unit Access Control has been completed, Unit Owner will receive a confirmation email. 'Contact' will also receive an email notification advising them of the same but will contain a link directing them to complete their OwnerLink registration.

To complete the registration process, **using the link** received in the User Account Approval Email Request notification, the 'Contact' will need to complete the following steps:

1. Create a unique Username.
2. Create 3 Security words.
3. Read and Accept the Terms of Use and Acceptance Agreement.
4. Click Proceed.

Once the above has been submitted, 'Contact' will receive an email containing a password and confirmation link. To finalize their OwnerLink account, they must click on the URL contained in the email. Once confirmed, using created Username, Security word, and password provided in the confirmation email, 'Contact' will have access to OwnerLink.