

DIRECTOR DASHBOARD MANUAL

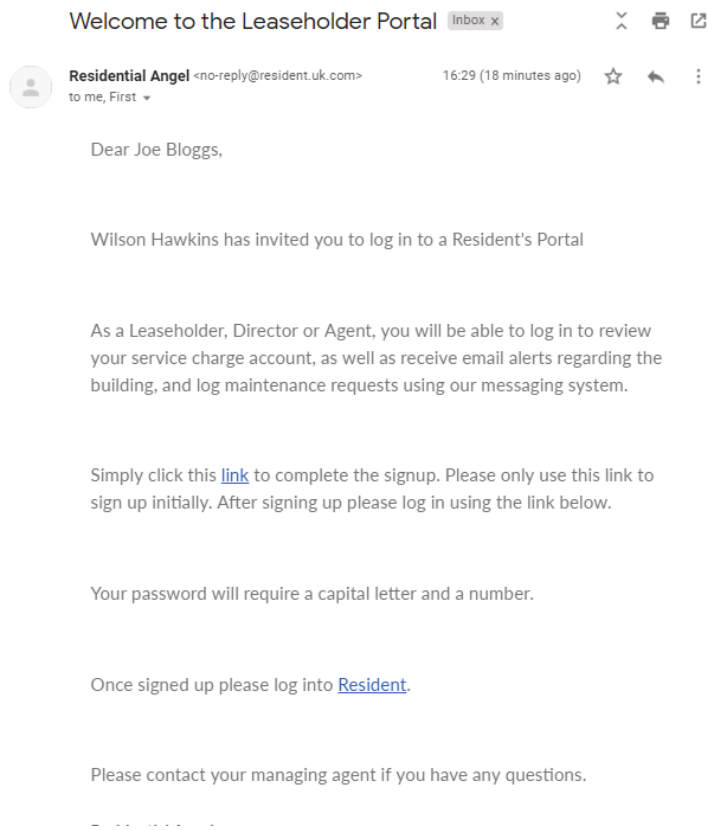
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This manual aims to show you how to use the Director portal. Please keep in mind all content below is presented using default configuration of access. If your agent has adjusted it you might have either more or less sections you can access. For any queries regarding this please contact your agency/administrator.

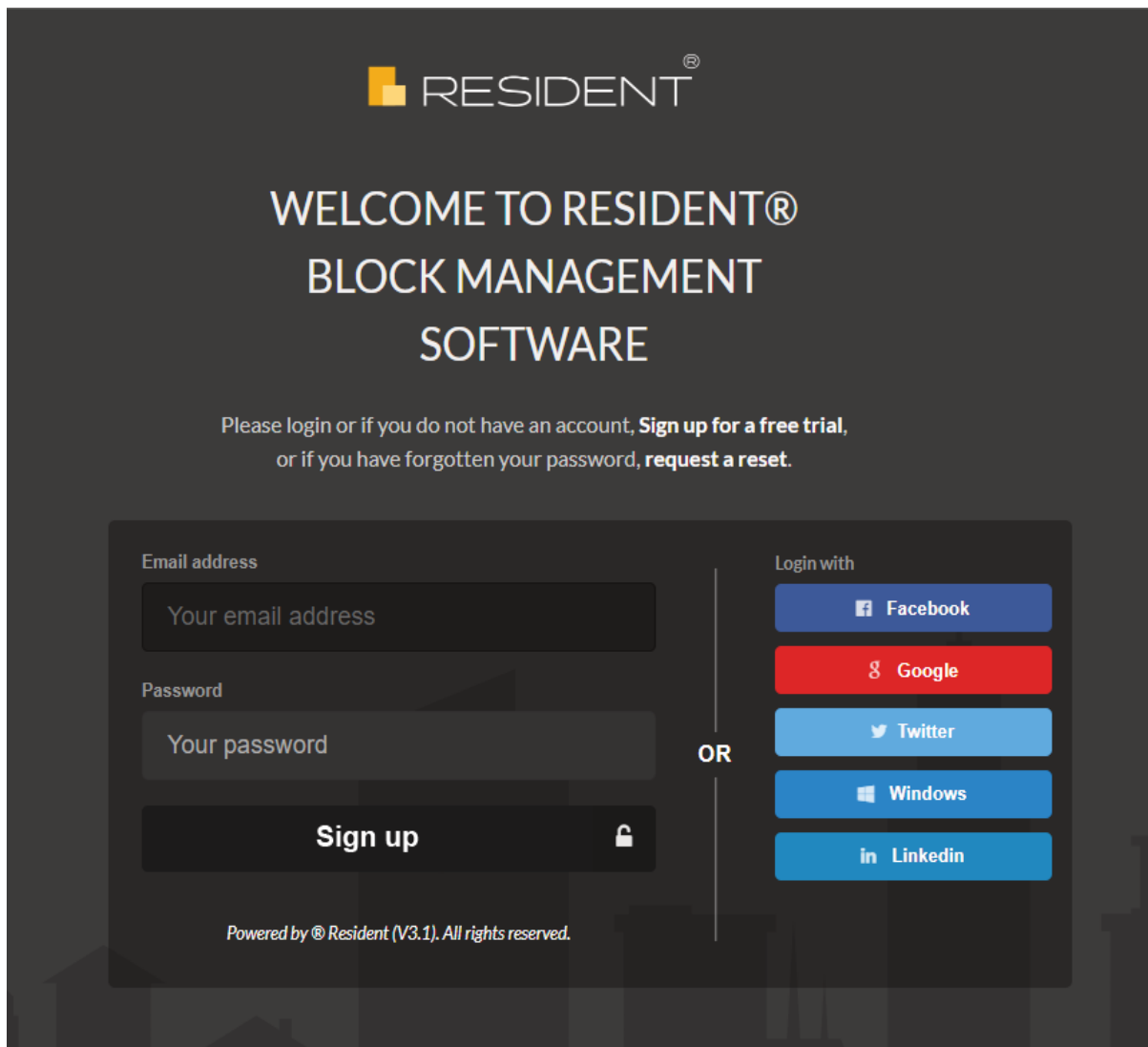
Logging in for the first time

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 instructs users to "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 for social media and operating systems: Facebook, Google, Twitter, Windows, and LinkedIn. An "OR" separator is placed between the email/password fields and the social media buttons. At the bottom of the form, it says "Powered by © Resident (V3.1). All rights reserved."

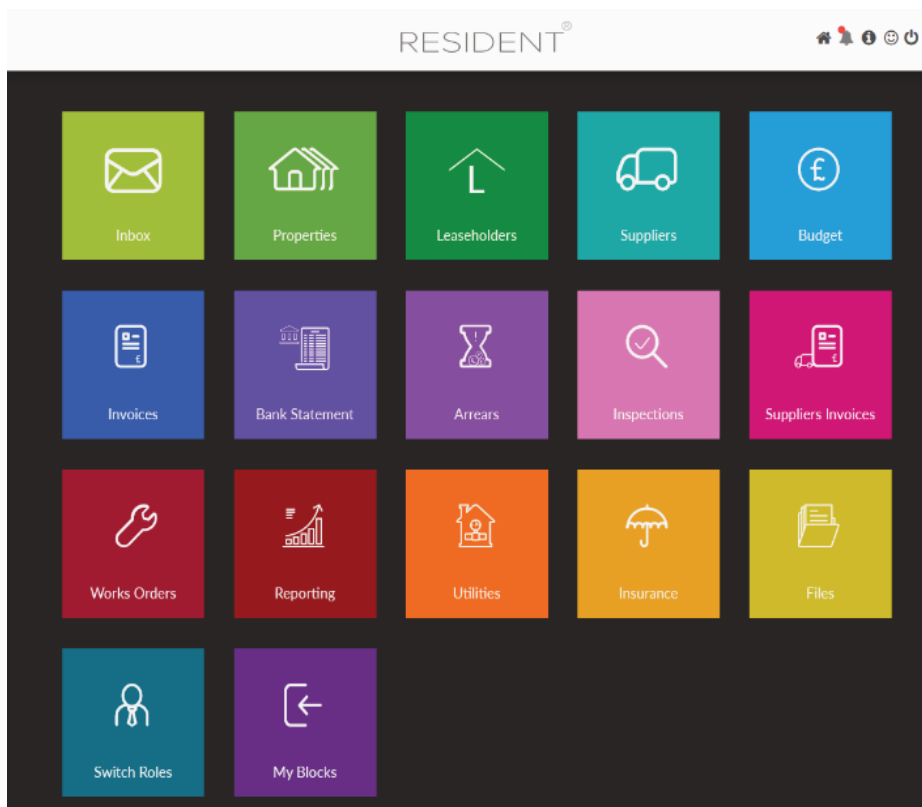
Here you may sign up with your email address, Facebook, Google, Twitter, Windows or LinkedIn account. Please remember which account you have used (or email address if this is the case) as you will need to know this to restore the account if a password is forgotten. We would always suggest to use the 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.

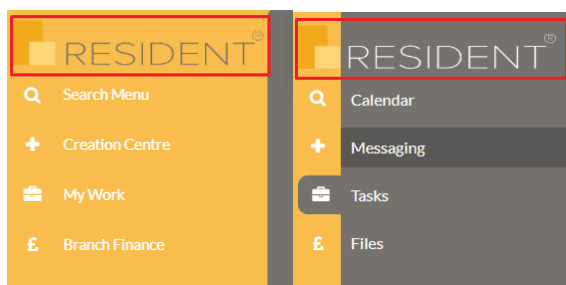
Below is an example of how our dashboard will look once we are signed in:



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:

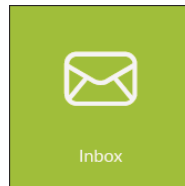


or our agency logo from any location. This logo can be found on the very top left as shown here (please note that the logo will be your own agency logo rather than the Resident logo and the menu colours are likely to be different):



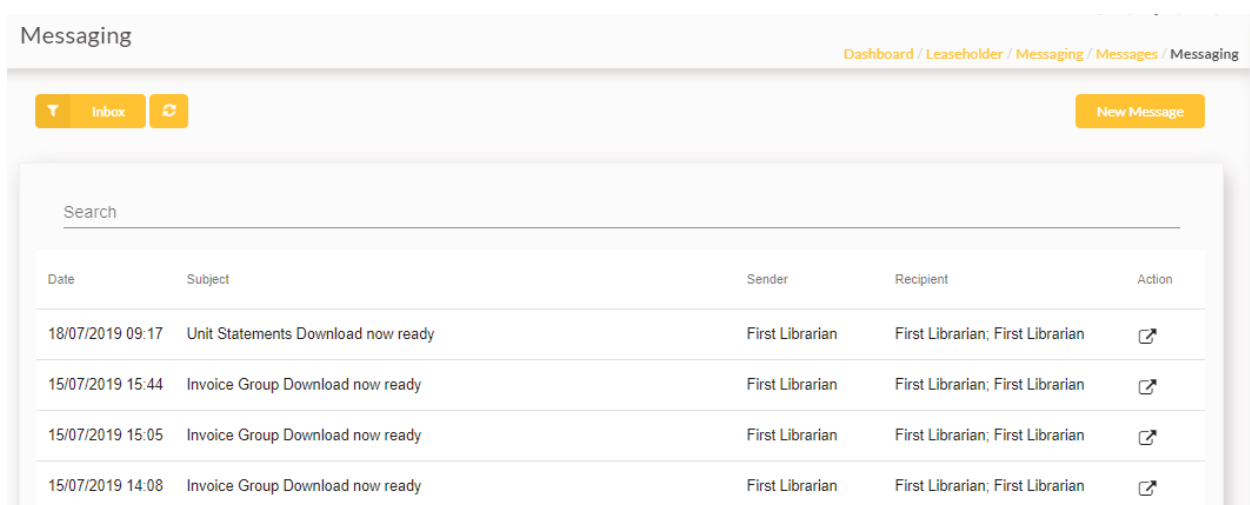
This guide will break down what all of the tiles on our dashboard do and a brief description of what can be found in each area. If there is no data or not the data you are looking for in any of these areas please contact your administrator for details.

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 in Resident. At the top right, there is a breadcrumb trail: 'Dashboard / Leaseholder / Messaging / Messages'. The main area is titled 'Messages' and contains several sections:

- Recipients:** This section has two dropdown menus. The 'Users Group' dropdown is set to 'AC Arundel Castle'. The 'Contacts' dropdown is open, showing a list of selected contacts: 'First Librarian (Director)' and 'Alex (Branch Administrator)'. Each contact has a small 'x' icon to its right for removal.
- Compose Email:** This section contains:
 - Subject:** A text input field containing the word 'Meeting'.
 - Body of Message:** A rich text editor with a toolbar containing icons for bold (B), italic (I), underline (U), strikethrough (ABC), link, unlink, list, indent, and text color. The text area contains the following message:

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](#)
 - Attachments:** A section showing one attached file. The file is represented by a thumbnail image of a document with a white bar over the text. Below the thumbnail is a 'Remove file' button.
- Buttons:** At the bottom left of the form, there are two buttons: a black 'Cancel' button and a yellow 'Send' button.

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:

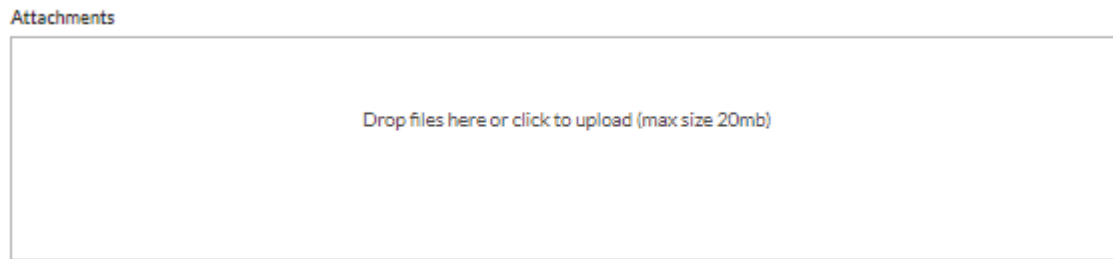
User Group: Will allow us to choose which block we would like to choose contacts for (if you have properties in only one block then only one option will be available).

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.

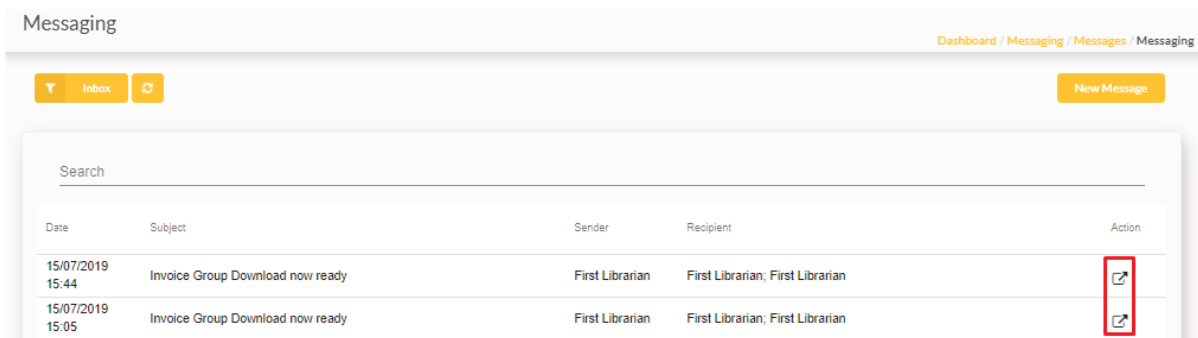
Attachments: This is optional. We may want to attach a file just as we would an email. When the 'Attachments' box is empty it will look as shown below.



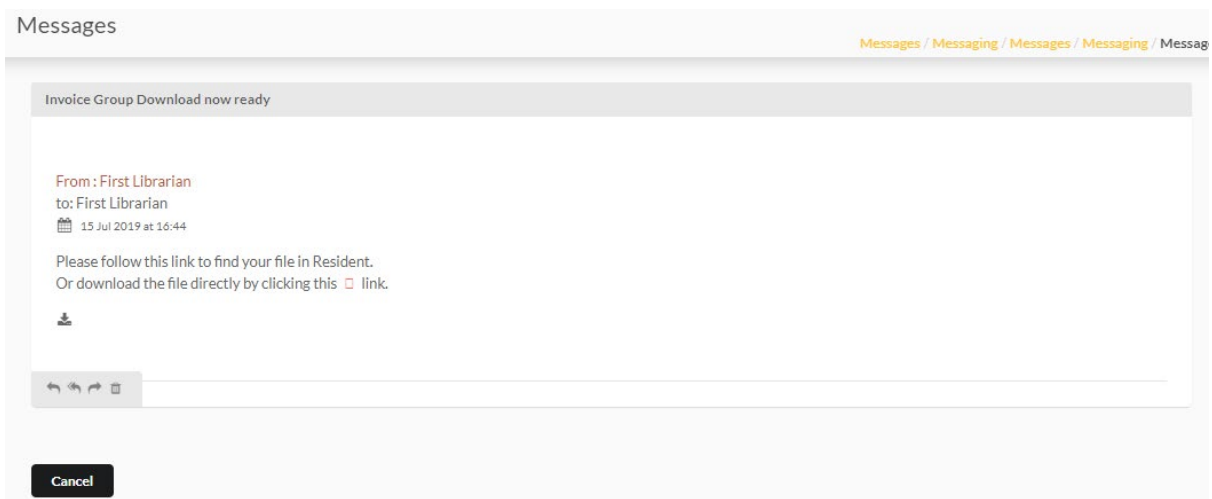
As it states, we may attach a file by clicking on the box and choosing a document from a folder on our computer or by dragging a file into this box and dropping it there. As the box also states please also ensure that the files attached to not exceed 20mb (this is quite large so this should not be a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

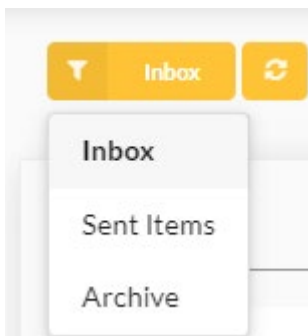
Reply to all

Forward

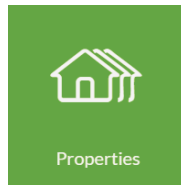
Archive (or delete if we are viewing this message from the archive)

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:



Properties



This tile will show us as list of all properties we have saved on Resident. From this list we can see the unit name and type. We can also see our name as the owner (and any joint owners) and the names of any tenants saved on Resident. Finally we can see our current balance and our pro rata balance.

Unit list | RH Resident House Dashboard / director / Unit list / director / Unit list

Search

Unit Name	Unit Type	Owner	Tenant	Current Balance	Pro Rata Balance	Action
Flat 1 (RH-F1)	Flat	Jane Doe & First Librarian		£ 6,650.00	£ 6,600.00	
Flat 2 (RH-F2)	Flat	Joe Bloggs		£ 6,600.00	£ 6,600.00	

We can view the statement for each of these units by clicking the person icon.

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	

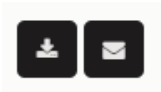
On this page we can filter by Category as shown below. Here you can see we have filtered by 'Ground Rent' on the drop down box at the top. This now shows all items with that category only.

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 the owner of the unit this 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 To Date

Cancel or **Email**

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
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		

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

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 occurrence)* 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)	
<input checked="" type="checkbox"/> Define Period		
Period Start* 01/01/2019	Period End* 31/12/2019	


Cancel **More Actions**

If we would like to send this demand to the owner of this unit or download it we need to simply click 'More Actions' and select the correct option as shown below:

Cancel **More Actions**

CHOOSE YOUR ACTION

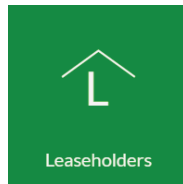
- Service charge for the period starting on 1 Jan 2019 to 31 Dec 2019
- Send
- Download
- Delete

If we would like to see details for a unit we can click the house icon on the statement page.  This will show us the address, name, reference and unit type.

Unit details | RH-F1 Flat 1 Dashboard / Unit list / Unit details

Unit Name* Flat 1	Unit Reference RH-F1
Unit Address* 48 Mount Ephraim, Tunbridge Wells, Kent, TN4 8AU	Unit Type* Flats

Leaseholders



If we select this tile we will be able to see all Leaseholders on our blocks. We will be able to see a list with names, numbers, email addresses and system roles (Whether they are a Leaseholder, Director Etc.). We can also see if they are able to log into the system from this list.

Users | RH Resident House Dashboard / director / personslist

Search

Name	Phone	Email	Role(s)	Can Login	Action
Jane Doe	07000000000	JaneDoe@resident.uk.com	Leaseholder (Resident Block Management Software) (Resident House) (Jane Doe & First Librarian, Flat 1)	Invited on 20/07/2019	
Joe Bloggs			Director (Resident Block Management Software) (Resident Leaseholder (Resident Block Management Software) (Resident House) (Joe Bloggs, Flat 2)	Invited on 19/07/2019	

To view a user in more details we can click on the 'Action' button.

Here we can see all details for this Leaseholder.

Contact Details Dashboard / director / personslist / 567891b3-248c-4db2-be52-25a40895e3e5

Details Units Invoices

Full Name *
Jane Doe

Salutation Ms Doe **Custom id** Enter a custom id

Email Label JaneDoe@resident.uk.com

Email Label Add Email

Phone Label 07000000000

Phone Label Add Phone Number

Address 1 48 Mount Ephraim, Tunbridge Wells, Kent, TN2 3JJ

Address Label Search Address

Note: No access to Resident (Invited on : 20/7/2019)

Forbid user from logging in User to be CCed on emails sent by them

[Back](#) [More Actions](#)

If we change the tab to 'Units' we can see which units this person owns.

Contact Details Dashboard / director / personslist / 567891b3-248c-4db2-be52-25a40895e3e5

Details Units Invoices

Unit	Block	Type	Start	End	Actions
RH-F1 Flat 1	RH Resident House	Owner	19/01/2019		

Back More Actions

If we switch to the 'Invoices' tab we will be able to see what invoices these users have outstanding.

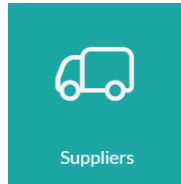
Contact Details Dashboard / director / personslist / 567891b3-248c-4db2-be52-25a40895e3e5

Details Units Invoices

Issue Date	Due Date	Unit Name	Category	Reference	Outstanding
19/07/2019	01/01/2019	RH-F1 Flat 1	3454 Service Charge	001-RH-F1	£ 6,600.00
20/07/2019	24/07/2019	RH-F1 Flat 1	Ground Rent	GR 1	£ 50.00

Back More Actions

Suppliers



If we click this tile we will get a full list of suppliers available to our blocks and a tab of recommended suppliers.

Suppliers | RH Resident House Dashboard / supplierslist

Agency Suppliers 3 Recommended Suppliers

Search

Name	Address	Phone	Email	Active	Action
Electricity Suppliers				✓	
H & S				✓	

Here we can see the name, address, phone and email address for each supplier. We can see more if we click the 'Action' button.

Supplier Details | Electricity Suppliers Dashboard / supplierslist / e7ae8f8e-5119-4964-b755-c127bc9f5f88

Details Categories Contacts 1

Name *

Website url **Custom Id**

Active
 Send remittance email

Description

Email label

Phone label

Address label

Cancel

Here we can see all details for the supplier.

If we select the 'Categories' tab we can see which categories this supplier is related to.

Supplier Details | Electricity Suppliers Dashboard / supplierslist / e7ae8f8e-5119-4964-b755-c127bc9f5f88

Details Categories **Contacts** 1

BANKING

<input type="checkbox"/> 121121 Bank Interest	<input type="checkbox"/> Bank Charges
<input type="checkbox"/> fgh	<input type="checkbox"/> fghgfh
<input type="checkbox"/> Fixed fees	<input type="checkbox"/> Money Laundry
<input type="checkbox"/> plum 123	

BLOCK REVENUE

<input type="checkbox"/> Ground Rent	<input type="checkbox"/> Test category
--------------------------------------	--

We can see all supplier contacts if we select the 'Contacts' tab.

Supplier Details | Electricity Suppliers Dashboard / supplierslist / e7ae8f8e-5119-4964-b755-c127bc9f5f88

Details Categories **Contacts** 1

Order by: Name | Sort: Asc | Per page: 25 | Search:

Name	Actions
Steve	

Cancel

If we select a contact with the eye icon we can see all contact details for this contact.

Contact Details Dashboard / supplierslist / e7ae8f8e-5119-4964-b755-c127bc9f5f88 / 2e2511e4-bb3b-4320-8a49-e0acbf1998c5

Details

Full Name *
Steve

Salutation Steve **Custom Id** Enter a custom id

Email Label Add Email

Phone Label Add Phone Number

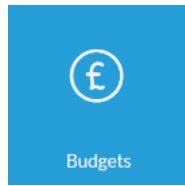
Address Label

Note : No access to Resident (User not invited yet)

Forbid user from logging in User to be CCed on emails sent by them

[Back](#)

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.

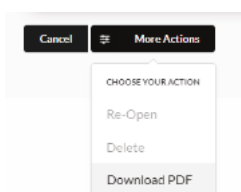
Details | Jan 2019 / Dec 2019 Budget Dashboard / Leaseholder / Budgets / Details

Details | Amounts | Totals Per Unit

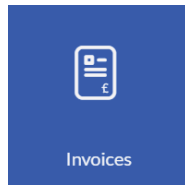
Budget Name *	Jan 2019 / Dec 2019 Budget	Custom Id *	Custom Id
Financial Period *	2019 - 2020 Financial Period	Invoice Item Description *	Schedule Name, Proportion and Period
Invoice Frequency *	Annually	Bank Account	Service Charge Account (default)
Schedules			
<input checked="" type="checkbox"/> Service Charge			
Totals			
Schedule			Total
Service Charge Amount			£ 13,200.00
Total			£ 13,200.00

Cancel More Actions

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



Invoices



This tile gives us access to all invoices for our blocks. Once clicked we will be taken to the 'Invoice Group' page. Here we can see all group invoices grouped by outstanding, draft and paid.

Invoices | RH Resident House Dashboard / director / invoicegroupslist

Invoice Group Supplementary Invoices

Outstanding Invoice Group

Order by: Category Sort: Asc Per page: 25 Search:

Category	Description	Outstanding	Actions
3454 Service Charge	Service charge for the period starting on 1 Jan 2019 to 31 Dec 2019	£ 13,200.00	
Ground Rent	Ground Rent	£ 100.00	

Draft Invoice Group

Order by: Draft Invoice Group Sort: Asc Per page: 25 Search:

Draft Invoice Group	Description	Outstanding	Actions
Ground Rent	Ground Rent	£ 100.00	

Paid Invoice Group

Order by: Category Sort: Asc Per page: 25 Search:

Category	Description	Amount	Actions
No items to display			

To view details for these groups we need to click the 'Action' button.

Once we have opened an invoice group we will be able to see the details for this group as shown below:

Details | 001 Service charge for the period starting on 1 Jan 2019 to 31 Dec 2019 Dashboard / Invoicegroupelist / 000b7780-6b93-49d2-8e20-06f9e4d82ad1

Details Invoices (2)

Description * Service charge for the period starting on 1 Jan 2019 to 31 Dec 2019 Invoice Reference Prefix(23 occurrences) * 001 Cover Letter

Category * 3454 Service Charge Bank Account * Service Charge Account (default)

Due Date 01/01/2019 Issue Date * 19/07/2019 Invoice Item Description * Schedule Name, Proportion and Period

Define Period

Period Start * 01/01/2019 Period End * 31/12/2019

Schedule Amounts

Schedule	Amount
Service Charge	13200
Other charges	0
Total	£ 13,200.00
Total Paid	£ 0.00
Total Outstanding	£ 13,200.00

Cancel More Actions

We can download the demands for this group or view the budget these are from by clicking 'More Actions'

CHOOSE YOUR ACTION

- Jan 2019 / Dec 2019 Budget
- Send All Invoices
- Back to Draft
- Download All

More Actions

We can select the 'Invoices tab if we wish to see a breakdown of the demands on Resident and any payments that have been assigned to them (the number in brackets next to the 'Amount').

Details Invoices (2)

Invoice Reference	Unit Name / Invoice Item	Owner(s) / Percentage Contribution	Amount	Outstanding Amount
001-RH-F1	RH-F1 Flat 1	Jane Doe & First Librarian	£ 6,600.00 (€ 0.00)	£ 6,600.00
	Service Charge	50.000000 %	£ 6,600.00	
001-RH-F2	RH-F2 Flat 2	Joe Bloggs	£ 6,600.00 (€ 0.00)	£ 6,600.00
	Service Charge	50.000000 %	£ 6,600.00	

Cancel More Actions

If we wish to download a demand we can click the download button next to the reference.

If we wish to open the demand up to see more details we can click 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

Bank Account

Service Charge Account
Account number: 00000000
Sort code: 000000

Resident House

Property Address
48 Mount Ephraim
Tunbridge Wells
TN4 8AU

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

Debtor Details

Jane Doe & First Librarian
JaneDoe@resident.uk.com
48 Mount Ephraim, Tunbridge Wells, Kent, TN2 3JJ

Date	Payments	Totals
No Payments Received		
Payments Received Total		£ 0.00
Amount Due		£ 6,600.00

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(s) occurrences: 001-RH-F1

Owner(s): Jane Doe & First Librarian

Issue Date: 19/07/2019 Due Date: 01/01/2019

Category: 2454 Service Charge

Bank Account: Service Charge Account (default)

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

If we would like to see individual invoices then we can select 'Supplementary Invoices' from the 'Invoices' page. Here we can see all individual demands and open/send them as with the group invoices.

Invoices | RH Resident House Dashboard / director / invoicegroupslist

Invoice Group Supplementary Invoices

Outstanding Invoices

Order by: Name | Sort: Asc | Per page: 25 | Search:

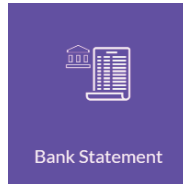
Name	Category	Reference	Unit Owners	Description	Outstanding	Actions
20/07/2019	Ground Rent	GR 1	RH-F1 Flat 1/RH-F1-1 Jane Doe & First Librarian		£ 50.00	

Paid Invoices

Order by: Issue Date | Sort: Asc | Per page: 25 | Search:

Issue Date	Category	Reference	Unit Owners	Description	Amount	Actions
No items to display						

Bank Statement



This tab will show us our bank transactions and their reconciled status. This page allows us to see which bank account we are looking at (this can be changed with the drop down box) and allows us to set a specific date range.

The 'Totals' box gives us a run down of numbers based on the dates we have input and below this we have a list of all transactions recorded. We can search this list with the bar at the top of the list. We can see the reconciliation status in the 'Rec status' column marked by a tick for reconciled and a cross for not reconciled yet.

Transactions | RH Resident House Dashboard / director / All

More Actions

Account and Period Selection

Bank Account: Service Charge Account Start Date: 21/06/2019 End Date: 21/07/2019

Totals

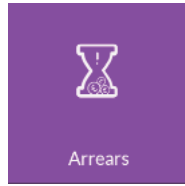
Money in: £ 10,000.00 Money out: £ 0.00 Balance From: £ 0.00 Balance To: £ 10,000.00

Unreconciled Balance Start Date: £ 0.00 Unreconciled Balance End Date: £ 0.00

Search

Date	Type	Description	Debit Amount	Credit Amount	Balance	Rec. Status	Action
01/07/2019	Opening Balance	Opening Balance		£ 10,000.00	£ 10,000.00	✓	🔗

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

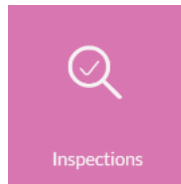
Category: Service Charge Initial Amount: £ 825.77 Current Amount: £ 1,075.77

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)					

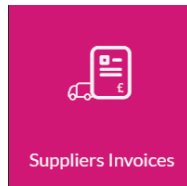
If we open a category we will be able to see any invoices raised in relation to this and any files uploaded by agents.

Silent Towers | AC,Arundel Castle Dashboard / Files

Files Fire Risk Assessment | Fire Risk Assessment

Attachments
<p>Current Attachments</p> <p>21/07/2019 18:13 - Fire Risk Assessment.docx</p> <p style="text-align: right;"> Download Delete </p>

Suppliers Invoices



This tile allows us to see any supplier invoices on our blocks. The opening page will give us a view of all invoices and the stage they are currently at.

Invoices | RH Resident House Dashboard / director / invoiceslist

Pending Invoices 2 | Approved | Paid | Rejected

Order by: Supplier | Sort: Asc | Per page: 25 | Search:

Supplier	Reference	Category	Block Name	Invoice Date	Payment Due	Outstanding	Actions
Electricity Suppliers	Electricity	Electricity Bills	Resident House	16/07/2019		£ 2,000.00	
H & S	Fire Risk Assessment	Fire Risk Assessment	Resident House	20/07/2019		£ 500.00	

We can open any invoice using the 'Action' button.

Once open we can see details for the invoice items and any payments assigned to this invoice.

Invoice Details | Electricity Electricity Suppliers, Issued on 16 Jul 2019 Dashboard / director / invoiceslist / 88e18ddd-090d-4651-ae4b-3e39f397a68c

Money on Account: £ -2,032.00

Summary | Invoice

Invoice Number: Electricity
Issue Date: 16/7/2019

Electricity Suppliers

Resident House

Property address:
48 Mount Ephraim
Tunbridge Wells
TN4 8AU

Invoice Items	Category	Schedule	Amount Due
Electricity	Electricity Bills	Service Charge	£ 2,000.00
Invoice Total Due			£ 2,000.00

Date	Payments	Totals
No Payments Received		
Payments Received Total		£ 0.00
Amount Due		£ 2,000.00

[Cancel](#)

We can see a preview of the bank balance if we click on the 'Money on Account' button.

Money on Account : £ -2,032.00

BANK BALANCE : £ 120.00

Total of Outstanding Invoices : £ 2,152.00

Total of Works Orders in Progress : £ 0.00

We can see how this invoice works out when compared to budgeted amounts if we click on the pie chart. If this chart is red it means we are over budget.

Iunbridge Wel TN4 8AU

2019 - 2020 FINANCIAL PERIOD

Budgeted Amount : £ 2,000.00

Outstanding Invoices : £ 0.00

Paid Invoices : £ 0.00

Outstanding Budgeted Amount : £ 2,000.00

We can see more details such as linked bank account, issue date and supplier if we click the 'Invoice' tab.

Summary Invoice

Invoice Reference(1 occurrences) *
Electricity

Block (Company Name) *
Resident House

Bank Account *
Second Main Account

Supplier *
Electricity Suppliers

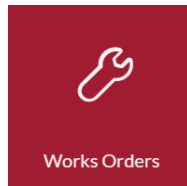
Invoice Date *
16/07/2019

Invoice Description
Electricity Suppliers, Issued on 16 Jul 2019

Payment Due Date
DD/MM/YYYY

Define Period

Works Orders



This tile gives us a break down of all works orders on our blocks. The first page we see gives us a list of these and which stage they are at.

Work Order List | RH Resident House Dashboard / workorderslist

In Progress 1 | Work Instructed | Work Finished | Completed

Search

Date	Title	Category	Reference	Status	Approval Status	Action
21/07/2019	Roof Repair	Flat Roof over 7 Years Old	1281	New	Pending Approval	

We can open a works order by clicking the 'Action' button.

Here we can see the details of this works order and which category it is in relation to.

Details | 1281 Roof Repair Dashboard / aa3fd9b-6cfc-4608-8480-65b05732b505

Outstanding Budgeted Amount : 0.00 Money on Account : £ 9,500.00

Details | Workflow Status | Quotes 1 | Work

Reference(1 occurrences) * Works Order *

Date Maintenance Category *

Description

Bank Account * Work Status Approval Status

Cancel

As before, we can see a break down of the bank account and budgeted amounts if we click on these two buttons at the top.

Outstanding Budgeted Amount : 0.00 Money on Account : £ 9,500.00

BANK BALANCE : £ 10,000.00

Total of Outstanding Invoices : £ 500.00

Total of Works Orders in Progress : £ 10,000.00

If we change the tab to 'Workflow Status' we can see at which stage the approval is and also at which stage the work progress is.

The screenshot shows the 'Workflow Status' tab selected. It displays two logs:

Approval Process Log

Status	Date	Submitted By	Actions
New	21/07/2019	First Librarian	
Pending Approval	21/07/2019	First Librarian	

or

Work Process Log

Status	Date	Submitted By
New	21/07/2019	First Librarian

The 'Quotes' tab gives us a look at which quotes we have received and any preferred quotes.

The screenshot shows the 'Quotes' tab selected. It displays the following information:

Quote Instructions

Roof repair

Quotes

Is Preferred	Supplier	Amount	Earliest Start	Duration	Actions
<input type="checkbox"/>	Roof people (1.68 mi)	10000	25/07/2019	5	

Quote Status : NoContact

[Email Supplier for a Quote](#) [Quote Requested Manually](#)

or

The 'Work' tab will let us know if a quote and supplier has been approved and for how much.

The screenshot shows the 'Work' tab selected. It displays the following information:

Approved Quote Amount*

10000

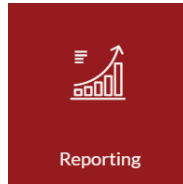
Work Instructions

Roof repair

Approved Supplier

Roof people (1.68 mi)

Reporting



This tile gives us access to all reports we will need for end of year reports and general enquiries. See below for a list of the reports available:

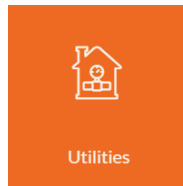
Accounting

Budget VS Expenditure Cash Book Creditors Debtors Expenditure Nominal Detail Payments Arrears Age (Beta version) Trial Balance

Service Charges

Annual Charges Apportionment Service Charge Balancing

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

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 *

21/07/2019



Type *

Estimate



Day Rate *

Night Rate

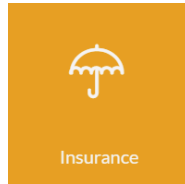
Other Rate

Cancel

or

Create

Insurance



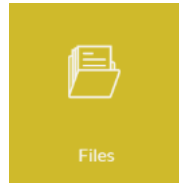
This tile allows us to see details uploaded by agents regarding Insurance. The first page gives us a list of Insurance categories we currently have and any details regarding tasks, notes and files made in regards to these.

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								
Outstanding Invoic...							Dashboard / Insurance / Utilities / Outstanding Invoices List								
Paid Invoices List							Order by								
Files							Sort		Per page		Search				
							Category		Asc		25				
							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.

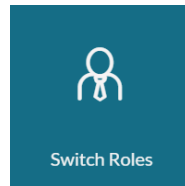
Files | AC Arundel Castle Dashboard / Leaseholder / Files

Attachments

Current Attachments

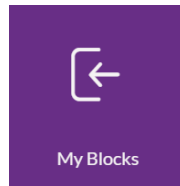
15/07/2019 10:05 - Arundel Castle All statements 7152019 100418 AM.pdf	Download	Delete
15/07/2019 10:00 - Arundel Castle All statements 7152019 95935 AM.pdf	Download	Delete
15/07/2019 09:05 - Arundel Castle All statements 7152019 90403 AM.pdf	Download	Delete
11/07/2019 14:03 - Arundel Castle All statements 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.

My Blocks



This tile allows us to see and open any blocks we have on Resident. A small pop-up will appear. We can choose the block we would like to see by selecting the 'Action' button next to it. 

Reference ↑	Block Name	Block Address	Client	Units	Action
AC	Arundel Castle	Arundel	Silent Towers	11	





















Close

This will open the unit list for the whole block. This list is exactly the same as the list for the 'Properties' tile and the statements and unit details can be viewed in the same way too.

Unit list | AC Arundel Castle

[Dashboard / director / Unit list](#)

Search

Unit Name	Unit Type	Owner	Tenant	Current Balance	Pro Rata Balance	Action
Apartment 01 (A011111111)	CommercialVat	Adam Lancelot. & First Librarian	James Teanant	£ 8,199.43	£ 5,799.43	 
Apartment 02 (A021111111)	Maisonette	Sam Gawain. & Michal MarekMMM		£ 109,334.57	£ 106,000.57	 
Apartment 03 (A031111111)	Apartment	Mr John Geraint.		£ 1,858.57	£ 1,858.57	 
Apartment 04 (A041111111)	Apartment	Mr Robert Percival.		£ 3,084.32	£ 3,084.32	 
Apartment 05 (A051111111)	Apartment	Mr Bors The Younger		£ 3,182.32	£ 3,182.32	 
Apartment 06 (A061111111)	Commercial	Mr B & P Lamorak.		£ 134,756.43	£ 134,756.43	 
Apartment 07 (A071111111)	CommercialVat	Mr Gerd Kay.		£ 3,182.32	£ 3,182.32	 
Missing Items (AC-MI)	House	New Leasehold		£ 34,888.00	£ 34,888.00	 
New Test Unit (AC-NTU)	Apartment	Mr New Thing		£ 14,944.00	£ 14,944.00	 
Type test No vat (AC-TN)	Commercial	No vat ownership		£ 100.00	£ 100.00	 
Vat unit (AC-V)	CommercialVat	Vat ownership		£ 100.00	£ 100.00	