TENANT PORTAL ACTIVATION INSTRUCTIONS

We are pleased to offer a way for our tenants to access their account information and make online payments.

To create an account:

1. Go to our website: www.tricorealty.com and click on the "Tenant Portal" button

2. On the Tenant Web Access screen, click Sign up.

3. **Leave Location set to "Default"**

4. Enter your account number.
(This can be found on your monthly digital statement in the top right area.)

5. Enter your email address on file. This will be your username**.**

**If you are unsure of which email address to use, please contact us at
714-751-4420 or by email at info@tricorealty.com**

6. Click "Sign up" button, then check your email to verify your account.

7. Click the **finalize** link in the email and create a password

While logged into Tenant Web Access, click the tabs at the top of the page to:
- View your Dashboard
- View your Open Charges
- Make a payment and manage payment information

If you have any questions about Tenant Web Access, please do not hesitate to call our main office at 714-751-4420 or email us at info@tricorealty.com

Frequently Asked Questions

Q: How do I create my Tenant Portal Account?

    A: To create an account:

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        2.   On the Tenant Web Access screen, click Sign up.

        3.   **Leave Location set to "Default"**

        4.   Enter your account number.
                (This can be found on your monthly digital statement in the top right area.)

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Q: Where do I find my account number?

    A: Your account number can be found on your monthly digital statement in the top right area.

Q: What if I forgot my password? How do I reset my password?

    A: Click on the "Forgot Password" link on the login screen for the Tenant Portal and follow the prompts to reset your password.   It is located under the field where you enter your password.

Q: What is my Username?

    A: Your Username is an email address registered to your account. If you are unsure of which email address to use, please contact us at info@tricorealty.com.

Q: Why am I getting "invalid Username or password" when I try to log in?

    A: Please make sure you are using an email address registered to your account that was associated with your Tenant Portal and your most recent password. If you are not sure of your Username please contact us at info@tricorealty.com. If you are not sure of your password, please use the "Forgot Password" link on the login screen.

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Q: I have my email address and reset my password but I still cannot login?
A: Did you leave the Location set to Default? If you changed it, please flip the drop down back to Default and try logging in again. The Location should always be "Default". If you are still having trouble, please email us at info@tricorealty.com.

Q: Multiple Accounts. Can I combine my accounts to have 1 login?
A: You can link multiple accounts to have the same username (email address) and password to log in to all of your accounts. Once you have created 1 account, Go to the Settings to "Linked Account Management" and click "Add Another Account".

Or if you would like assistance, please email info@tricorealty.com asking us to link your other account(s) and we will link them on the back end for you.

Q: Multiple Accounts: How do I view my other account(s) once I log in to one of my accounts?
A: Once you have your accounts links, login as normal, then go to the Far Top Right of the Screen. You should see a Dropdown Arrow next to your name and a Gearbox next to it. Click on the Dropdown Arrow and you should see your different account numbers. This is where you can select which account you are viewing at any given time.

Q: How do I add a User?
A: Please follow the Set Up Instructions with an authorized email address and your account number. You are welcome to set up access to more than one user to your account, but please realize that any user you give access to the account will be able to see all of the account, including any saved payment information.

Q: How do I remove a User?
A: Please email info@tricorealty.com requesting that a specific user be removed from accessing your account.

Q: Where do I go to set up my Payment Information?
A: Go to the Far Top Right of the Screen. You should see either a Dropdown Arrow or a Gearbox next to the name on your account. Click the Icon to get a new menu and select "Payment Settings" from the list to go to "Saved Payment Info & AutoPay".

Click the Blue "Add" button to add a new payment method then follow the prompts for the entry fields given.

Note: "Account types" defaults to Visa as it is the first in the list of 6 choices. To select another payment choice (such as a bank account or another credit card) please click the dropdown menu icon to the right of the word Visa.:

6 Payment Choices:
1. ACH – Checking (bank – you will need your routing number and account number);
2. ACH – Savings (bank – you will need your routing number and account number);
3. Visa (credit card),
4. Mastercard (credit card),
5. Discover (credit card), or
6. American Express (credit card).

Before you go: please be sure to
   1) click the Disclaimer check box and
   2) click the blue "Save" Button
before you leave the page to save your settings!

Q: How do I set up a Recurring Payment (AutoPay)?
   A: Go to the "Payment Settings" ("Saved Payment Info & Auto Pay") section in your Settings area.

If you haven't set up your payment information, please do so now. If you have set up your payment information, click the Blue button to edit your payment information.

Then on the right hand side of the screen, check the box next to "enable your automatic payment".

Select the Day of the Month you want the transaction to occur on. (It will happen around 2am on that day). We advise scheduling your payment at least 1 day in advance of its due date in case the date falls on the weekend (non-business day).

Select the "Payment Type": Balance Due (default) or Specific Amount
Note: We recommend Balance Due as if you have a scheduled Increase due per your Lease you might miss the increase if you forget to change your specific amount before the payment goes through.

Max Amount is optional. If you want to set a limit that the payment cannot go beyond, this is where you enter the number. Please be aware that if you set the amount to your exact monthly Rental amount and forget about a scheduled increase, your payment will be short and will incur a late fee on the payment shortage amount.

Don't forget to 1) click the Disclosure check box and 2) click the Blue Save Button before you leave the page to save your settings!

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Q: Are there convenience fees to pay online?

    A: If you use your bank account (select either "ACH – Checking" or "ACH – Savings") there is no Convenience Fee.

    If you use a credit card, you will be charged a convenience fee of 3%-4% depending on the type of Card. (3% for Visa, Discover, and Mastercard; and 4% for American Express)

Note: Debit Cards are treated as Credit Cards when processed through the system so if you intend to use your bank account please select one of the "ACH" choices.

Q: Why did I get a message saying "disclaimer field is required"? Where is this Disclaimer Field and what is it?

    A: You will not be able to proceed with your transaction if you have not checked the Disclaimer checkbox to acknowledge it. It can be found in the Saved Payment Information settings.

    Disclaimer : Please be advised that attempted chargebacks for Non-Fraudulent transactions through PayLease system will be subject to criminal investigation and these individuals will be prosecuted to the fullest extent of the law.

    **E-check Transactions: In the event that the bank for the account used above returns this transaction for Insufficient Funds, I will be assessed a $25 NSF fee.

Q: How can I check my Balance? (What do I owe this month?)

    A: At the top of the screen, you will see a grey/black header bar. Click on "Charges" to view a list of open charges.

    Note: If you do not have any open charges, no charges will appear in this section.

Q: Where do I go to find a copy of my Statement or a signed Lease Document?

    A: At the top of the screen, you will see a grey/black header bar. Click on "Notes" in the Header. Enter a Date Range for the billed item then the blue "Filter" button or click the checkbox for "All Date".

Q: I got billed back for an invoice (Electrical Usage, Repair/Rehab. Etc.). Where do I go to find a copy of the invoice?

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A: At the top of the screen, you will see a grey/black header bar. Click on "Notes" in the Header. Enter a Date Range for the billed item then the blue "Filter" button or click the checkbox for "All Date".

Q: I was billed a Reconciliation Charge (CAOE/CAM, Property Tax, &/or Property Insurance). Where do I go to find a copy of the charge breakdown?

A: At the top of the screen, you will see a grey/black header bar. Click on "Notes" in the Header. Enter a Date Range for the billed item then the blue "Filter" button or click the checkbox for "All Date".

Q: How do view my Transaction History?

A: Please email info@tricorealty.com requesting a copy of your Transaction History and we will email you a copy.

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