

Manage your property online



Customer Portal User Guide

Contents

1.	Introduction	2
2.	What you need to do before accessing the MyPrinciple?	2
1.1.	What is my Customer reference?	2
1.2.	Are there other benefits of registering my email?	2
1.3.	Register Principle Estate Management as a Safe Sender	2
1.4.	Clear your computer history (cache)	3
3.	Where to find the Portal	3
4.	How to register to use the Portal	3
1.5.	Customer Reference	4
1.6.	User Name	4
1.7.	Your Email	4
1.8.	Register	4
5.	Changing your password	4
1.9.	User Name	4
1.10.	Existing password	4
1.11.	New password/Confirm password	4
6.	Logging in to the Portal	5
1.12.	The Home Screen	5
7.	Making a payment	5
8.	Raising a maintenance or repair request	6



1. Introduction

We recognise the importance of access to information on-demand, in a way and at a time that suits you. Our Customer Portal gives you 24/7 access to manage your property online.

Through the Customer Portal you can:

- ◆ Make fast & secure online card payments
- ◆ Check your balance, previous transactions & outstanding jobs
- ◆ Store important documents, statements & invoices all in one place
- ◆ Get notifications relating to your property through the virtual noticeboard
- ◆ Report maintenance issues online at a time that suits you

2. What you need to do before accessing the Customer Portal?

Before you can use the Customer Portal you will need to register your email address with us. **If you already receive your correspondence from us by email, you will not need to notify us of your email address again.**

New customers: If you are new to Principle and have never given us any contact details, please complete the online [Contact Details form by clicking here](#).

Existing customers: If you are an existing customer, simply register your email by [clicking here](#) and we will update your account.

Once we have entered your email address on our system you will then be able to proceed with registering on the portal.

1.1. What is my Customer reference?

This is the 12 character reference shown on your invoice in the format: 000-000-000A

1.2. Are there other benefits of registering my email?

Yes. By registering your email address we will be able to send all future correspondence by email including invoices, budgets, statements and general letters.

By providing your email address to us, you consent to receiving all correspondence from us by email. Your contact details will NOT be shared with third parties for marketing purposes

1.3. Register Principle Estate Management as a Safe Sender

Principle Estate Management will send emails from these addresses:

info@principleestate.co.uk	Password and registration information
accounts@principleestate.co.uk	Invoices and correspondence
maintenance@principleestate.co.uk	Correspondence

Occasionally Outlook or other email providers will treat unknown email addresses as junk mail, so to avoid this happening you can register these email addresses as a safe sender.

You may also receive emails directly from individuals at Principle.

1.4. Clear your computer history (cache)

It is sometime the case that if you have browsed our website prior to the link to the Portal being made live that your computer will remember the original homepage and will direct you to the temporary page saying that the Portal will be coming soon.

In this case it is necessary to clear this memory from the computer.

Go to the Principle website home page www.PrincipleEstate.co.uk

If you are using Microsoft windows press Ctrl and F5 at the same time. Do this a couple of times and the computer should then be looking at the latest page and the Resident Login link should work.

For a Mac/Apple use Apple + R or command + R

For Linux use F5.

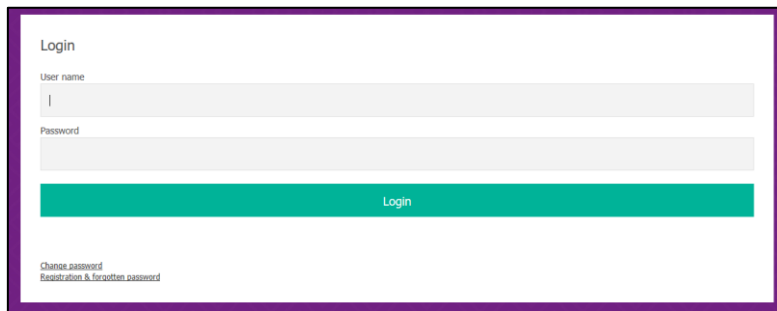
3. Where to find the Portal

Visit www.PrincipleEstate.co.uk and click the Customer Portal button on the top right hand side. This will take you to the login and registration page.

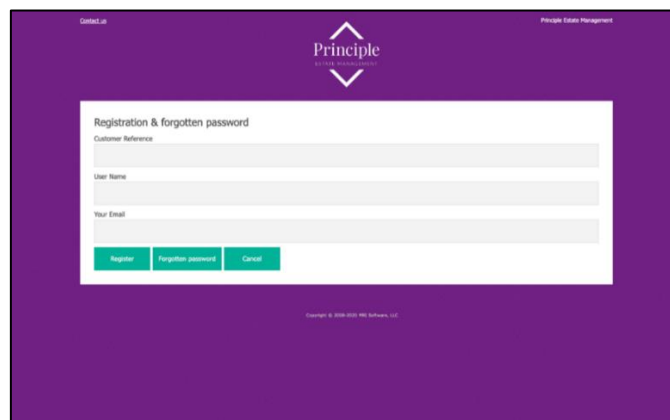
This is best viewed in a modern browser such as Edge, Chrome, Safari etc avoiding Internet Explorer if possible. You may also view the website and portal on your mobile device.

4. How to register to use the Portal

Click on the link as described above and you will find the Login Page:



Click on the link: **Registration & forgotten password**



1.5. Customer Reference

Enter your customer reference exactly as written including the dashes.

1.6. User Name

Your user name is your Customer Reference number, so enter that again.

1.7. Your Email

Enter the email address you have previously registered with Principle – you must first register your email address with us before you can use the portal. You can do that by [clicking here](#).

1.8. Register

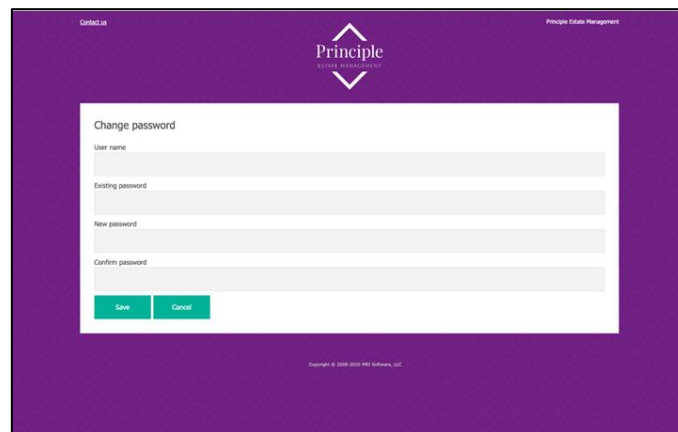
Click on the Register button.

The system will check that the email address is registered to your account and we will send you a password by email.

5. Changing your password

Once you receive your password you may wish to change it to something more memorable, although you do not have to. To do this return to the Login Screen and click on the link: **Change password**

You will see the following window



The screenshot shows a web form titled "Change password" set against a purple background. The form has a white background and contains the following fields: "User name", "Existing password", "New password", and "Confirm password". Each field is represented by a light gray rectangular input box. At the bottom of the form, there are two buttons: a green "Save" button and a white "Cancel" button with a green border. The "Principle" logo is centered at the top of the purple background, and the text "Principle Estate Management" is visible in the top right corner. A small copyright notice "Copyright © 2008-2020 PMS Software, Ltd" is located at the bottom center of the purple background.

1.9. User Name

Enter your User Name which is your Customer Reference Number found on all correspondence we send to you.

1.10. Existing password

Enter the current password. For new users this will be the one we have just sent to you by email.

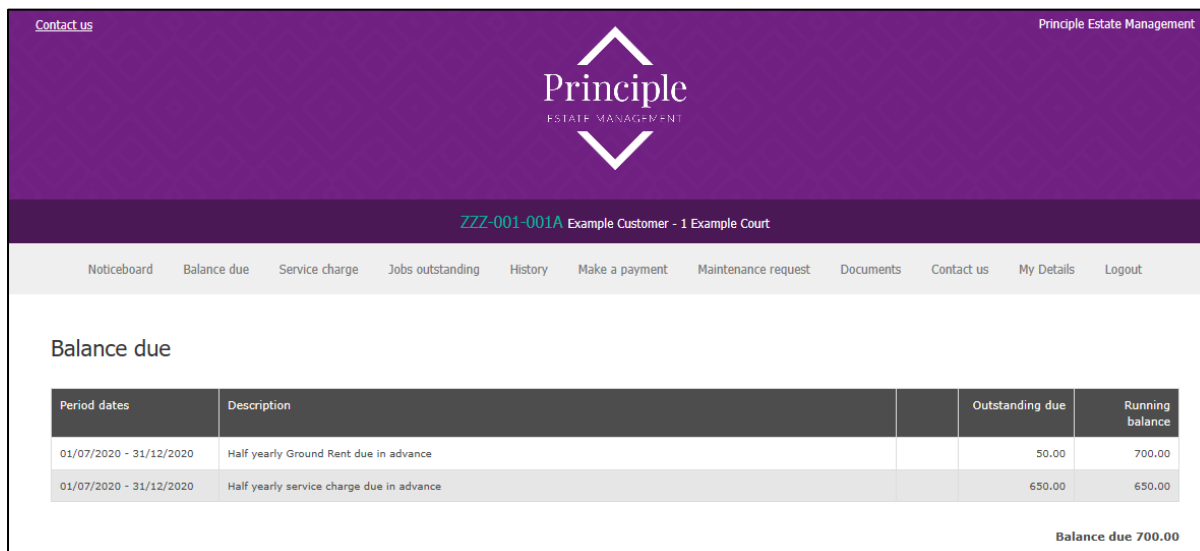
1.11. New password/Confirm password

Enter your new password and confirm it by repeating it exactly in the confirm password box.

6. Logging in to the Portal

Go to the Login page and enter your user name and password as described above.

1.12. The Home Screen



The screenshot shows the home screen of the Principle Estate Management portal. At the top, there is a purple header with the company logo and name. Below the header, a dark purple bar displays the customer reference 'ZZZ-001-001A Example Customer - 1 Example Court'. A navigation menu includes options like Noticeboard, Balance due, Service charge, Jobs outstanding, History, Make a payment, Maintenance request, Documents, Contact us, My Details, and Logout. The main content area is titled 'Balance due' and contains a table with the following data:

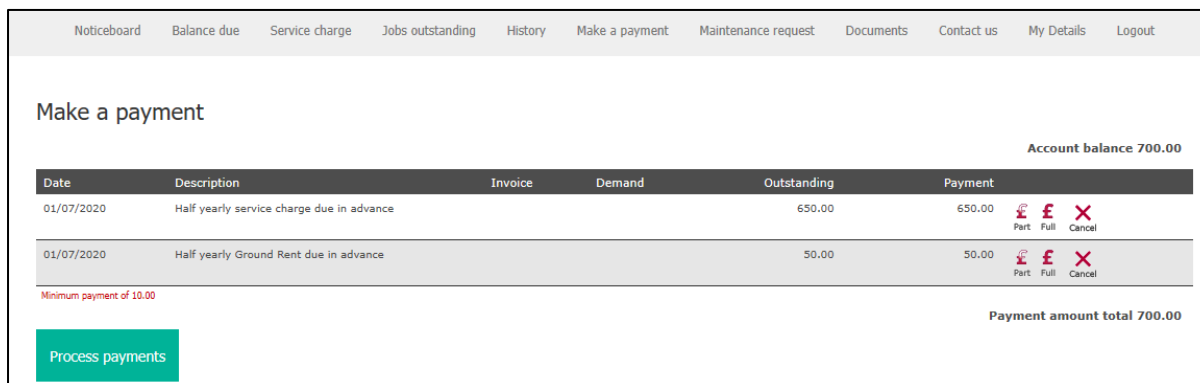
Period dates	Description	Outstanding due	Running balance
01/07/2020 - 31/12/2020	Half yearly Ground Rent due in advance	50.00	700.00
01/07/2020 - 31/12/2020	Half yearly service charge due in advance	650.00	650.00

At the bottom right of the table, it states 'Balance due 700.00'.

This is an example of a typical home screen showing your customer reference, your name and address, and any outstanding balances, together with the menu choices available to you.

7. Making a payment

You can make a card payment for all or part of the outstanding balance using Visa or Mastercard. Click on the Make a payment option and click on Full against each line to pay that amount in full. **You may need to scroll to the right on some devices.**



The screenshot shows the 'Make a payment' screen. It features a navigation menu at the top and a table of invoices. The table has columns for Date, Description, Invoice, Demand, Outstanding, and Payment. The 'Payment' column includes icons for 'Part', 'Full', and 'Cancel' payments. The total payment amount is shown as 700.00. A 'Process payments' button is located at the bottom left.

Date	Description	Invoice	Demand	Outstanding	Payment
01/07/2020	Half yearly service charge due in advance			650.00	650.00 Part Full Cancel
01/07/2020	Half yearly Ground Rent due in advance			50.00	50.00 Part Full Cancel

Account balance 700.00
Minimum payment of 10.00
Payment amount total 700.00

When happy with the choice click on **Process payments**

Noticeboard Balance due Service charge Jobs outstanding History Make a payment Maintenance request Documents Contact us My Details Logout

Payment details

First names:*

Last name:*

Address(1):*

Address(2):

City:*

Postcode:*

Country: United Kingdom
 Phone:

Payment amount total 700.00

* Fields are mandatory.

Enter the details as registered with your card provided including the address and postcode at which your card is registered.

Click **Process payments** and you will see a confirmation screen. If you are happy click **Confirm and pay**.

Principle Estate Management

Order description: Internet payment of 2 transaction(s), for ZZZ-001-001A on 14/03/2020 09:09:44

To pay
£700.00

How do you want to pay?

- VISA Visa >
- VISA Visa Debit >
- VISA Visa Electron >
- MasterCard >
- Debit MasterCard >

Click on your choice of card and enter your card details and complete the payment process.

Please note that this part of the system is provided by Sagepay and that no card details are recorded or retained within the records of Principle Estate Management.

Once successfully completed you will be returned to the Home Screen of the customer portal where you will be able to see your payment in the account History and be able to request an email confirmation of payment.

8. Raising a maintenance or repair request

Once logged in, click on the **Maintenance request** option.

Complete the mandatory fields indicated by a red asterisk and then click **Submit**. Your request will be sent to our Customer Service team who will get in touch with you about what will happen next.