

Principle Estate Management

Cornwall House
31 Lionel Street
Birmingham B3 1AP

0121 289 4315
info@PrincipleEstate.co.uk
www.PrincipleEstate.co.uk



Customer Portal User Guide

Contents

1.	Introduction.....	4
2.	What you need to do before accessing the Portal?.....	4
1.1.	What is my Customer reference?	4
1.2.	Are there other benefits of registering my email?.....	4
1.3.	Register Principle Estate Management as a Safe Sender	4
3.	Where to find the Portal.....	5
4.	How to register to use the Portal.....	5
1.4.	Customer Reference	6
1.5.	User Name.....	6
1.6.	Your Email	6
1.7.	Register.....	6
5.	Change Password.....	6
1.8.	User name	7
1.9.	Existing password.....	7
1.10.	New password/Confirm password.....	7
6.	Login to the Portal.....	7
1.11.	The Home Screen	7
7.	Make a payment.....	7



Customer Portal User Guide

Prepared: March 2020

V1.02

© Principle Estate Management LLP 2020

1. Introduction

The Principle Estate Management Customer Portal is a great resource available exclusively to our customers which offers, amongst other things:

- ◆ Online Card Payment of outstanding balances
- ◆ Detailed account history
- ◆ Access to invoices and statements relating to your account
- ◆ Access to useful documents
- ◆ Notification of important information relating to your property
- ◆ Online reporting of maintenance issues

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

Before you can use the portal you will need to register your email address with Principle Estate Management. To do this you may either email or call us and quote your Customer reference as shown on your invoice and the full name as written on the invoice. Once we have entered your email address on our system you will then be able to proceed with registering on the portal.

If you already receive your correspondence from us by email, you will not need to notify us of your email address again.

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 solutions will treat unknown email addresses as junk mail, so to avoid this happening you can register these email addresses as a safe sender.

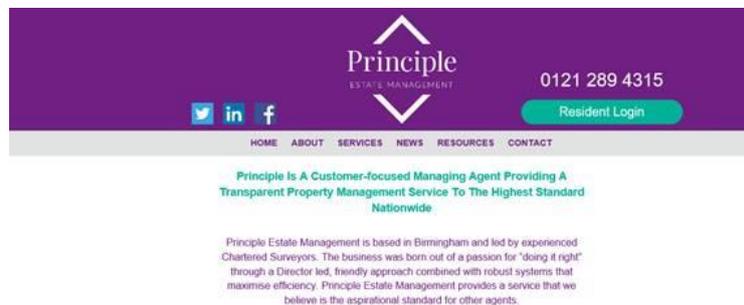
You may also receive emails directly from individuals at Principle.

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 F5

3. Where to find the Portal

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.

Navigate to our website: www.PrincipleEstate.co.uk

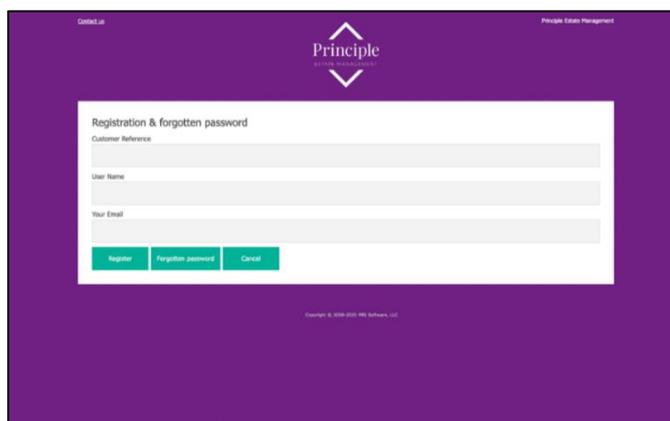
and click on the link called **Resident Login**. This is the green box as shown below



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**



The screenshot shows a web interface with a purple background. At the top center is the 'Principle' logo. The main content area is a white box titled 'Registration & forgotten password'. It contains three input fields: 'Customer Reference', 'User Name', and 'Your Email'. Below these fields are three buttons: 'Register', 'Forgotten password', and 'Cancel'. The footer of the page reads 'Copyright © 2008-2015 PMS Software, LLC'.

1.5. Customer Reference

Enter your customer reference exactly as written including the dashes.

1.6. User Name

Choose a user name and enter it here. You may perhaps use your customer reference or email address as your user name.

1.7. Your Email

Enter the email address you have previously registered with Principle Estate Management.

1.8. Register

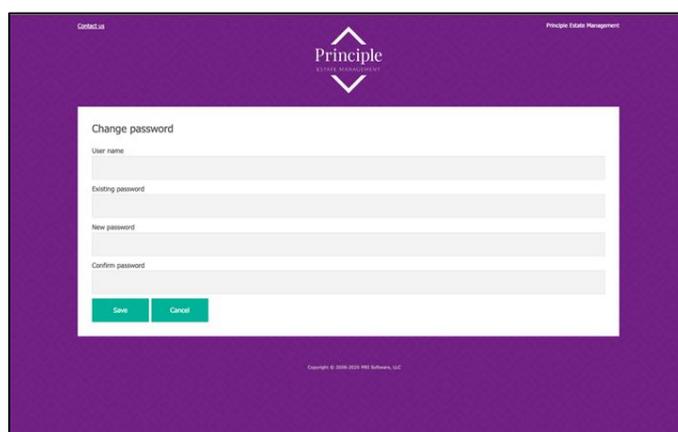
Click on the Register button.

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

5. Change Password

Once you receive your password you may wish to change it although you do not have to do so. 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 interface with a purple background. At the top center is the 'Principle' logo. The main content area is a white box titled 'Change password'. It contains four input fields: 'User name', 'Existing password', 'New password', and 'Confirm password'. Below these fields are two buttons: 'Save' and 'Cancel'. The footer of the page reads 'Copyright © 2008-2015 PMS Software, LLC'.

1.9. User name

Enter the user name you chose at Registration.

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. Login to the Portal

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

1.12. The Home Screen

ZZZ-001-001A Example Customer - 1 Example Court

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

Balance due 700.00

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

7. Make a payment

You can make a card payment of 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.

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

Make a payment

Account balance 700.00

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

Minimum payment of 10.00

Payment amount total 700.00

[Process payments](#)

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

[Cancel](#) [Process payments](#)

* 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.