

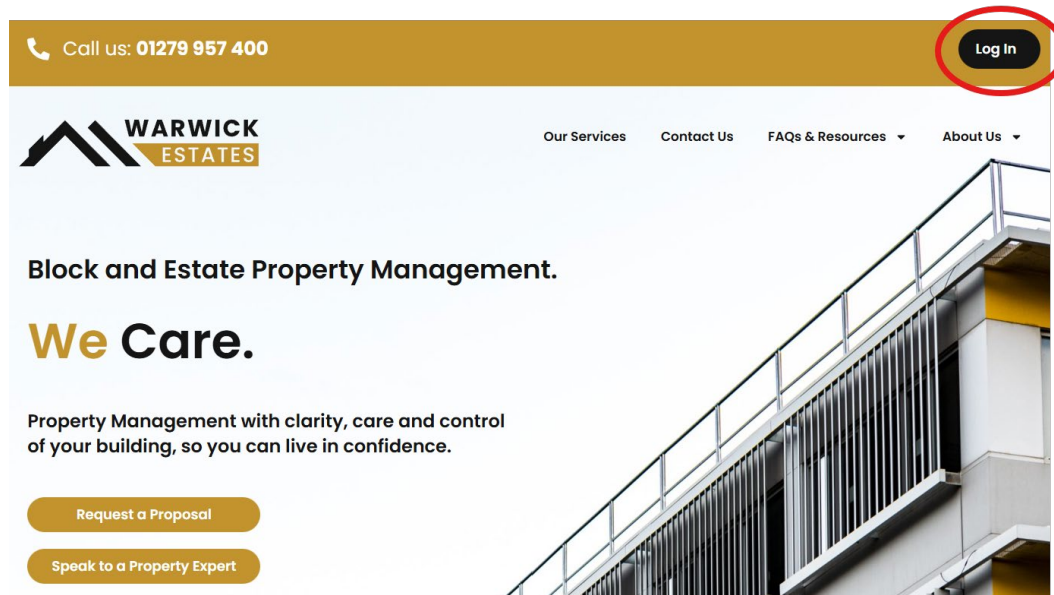
Customer Portal Guide

A guide to our portal for our leaseholders and property owners

Accessing the portal

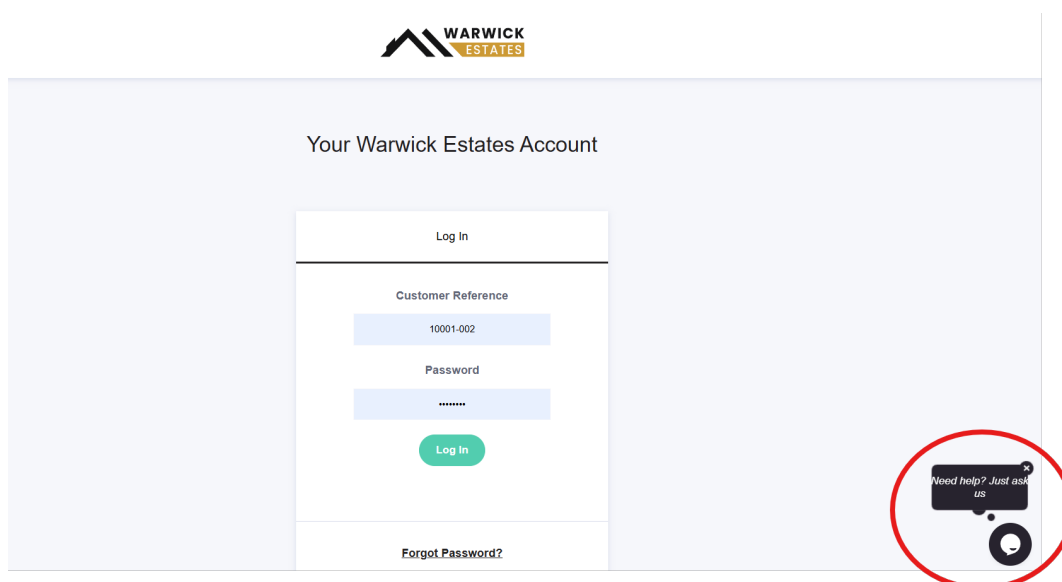
In order to access our customer portal simply head to www.we-pm.co.uk

In the top right-hand corner, you will see a 'Log In' option which will take you to the login screen for the portal.



When you reach the log in page you will require your tenant reference number and your password to access your account.

If you do not have these details, you can use our Live Chat facility found in the bottom right-hand corner, where a member of our team will be happy to provide these to you.

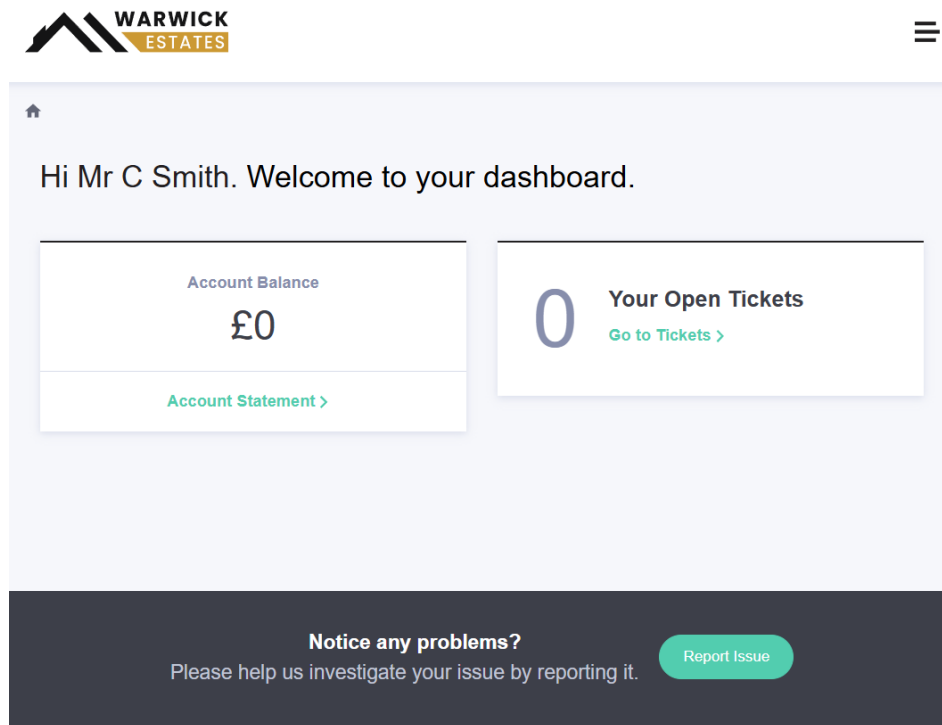


Note: The Live Chat icon will remain at the bottom right of the screen should you need to raise a query or require any help whilst on your customer account.

Dashboard

Once you have logged in, it will bring you to your dashboard where you can find your current account balance and the amount of open tickets on your account.

Note: Tickets are a way that we can communicate with you, our customers. Whenever you have a problem you can open a ticket. Our team can interact on this ticket so you can see updates of how the matter is progressing. When the issue is resolved, the ticket is closed.



The dashboard allows you to:

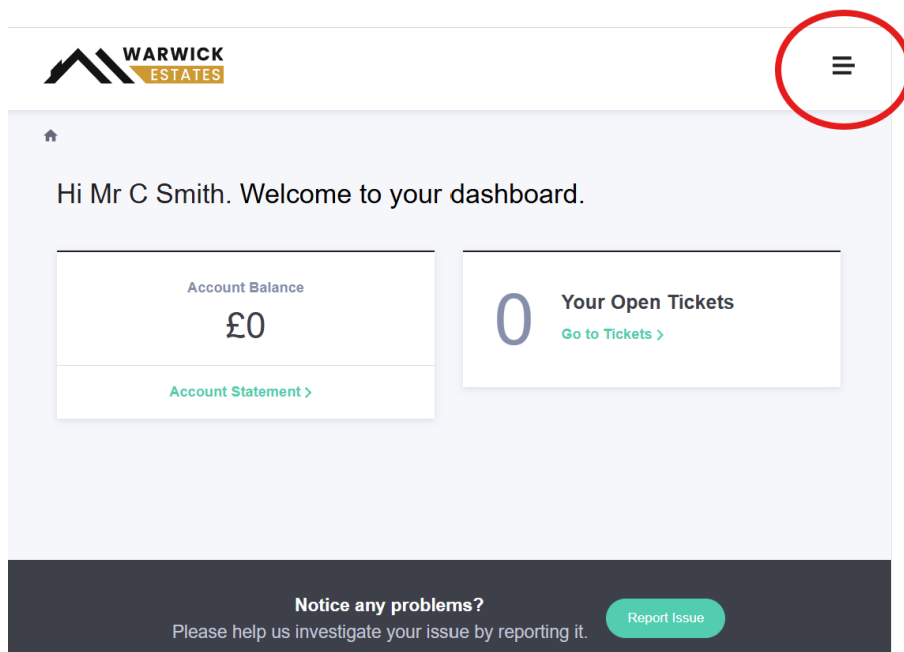
- View the Account Statement
- Go to Tickets

These options are explained in greater detail below.

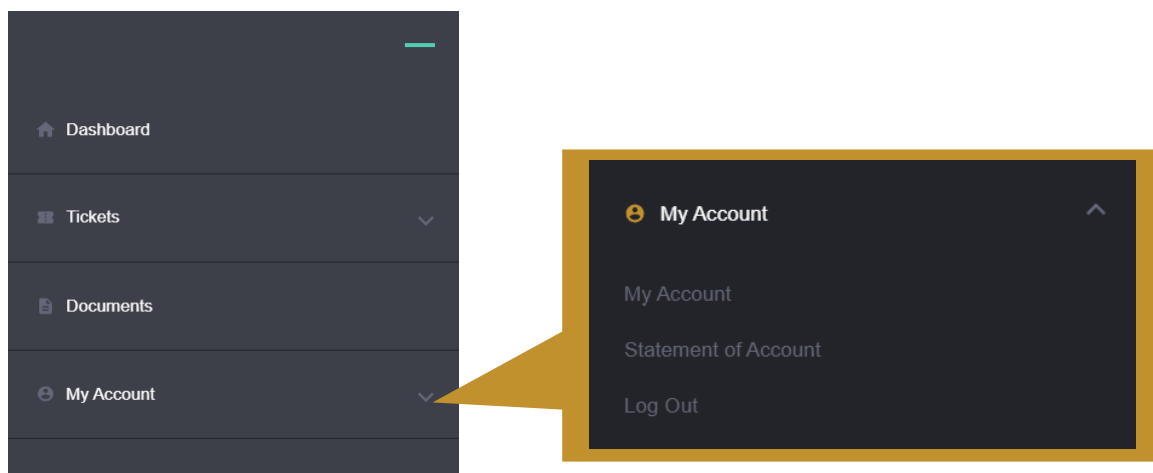
There is also an option on your dashboard to report an issue (bottom green button). Once you do, this will also log in your ticket section (see Go to Tickets below).

Menu Bar

Each page has a menu bar which is the top element with the logo and in the top right-hand corner, you will see three lines.



By selecting these, some options will appear on the right-hand side.



NOTE: Dashboard takes you back to your main dashboard page (page 2).
Don't forget to Log Out of your account when you are done!

Account Statement

By clicking 'Account Statement' on the dashboard, or 'Statement of Account' under 'My Account' on the menu bar, you will be able to see your current account statement, where you can view your outstanding balance and the charges that make up this amount.





 Account Statement

Account Statement

Dates

14.08.24

14.08.25

Apply

Account Balance £0

Transactions per page 10

Receipt	Amount	Balance
11.12.24	£-1,139.00	£0

Tickets

When selecting 'Go to Tickets' on the dashboard, Tickets on the menu bar or Report Issue in the footer, you will be able to view, edit or create a record of an issue that you have reported.

This system also allows you to see updates added by our team, so you are up to date with what is happening. These tickets will not be closed until the matter is resolved so you have complete transparency of information.





 Archived Tickets

Tickets

My Tickets

Archive

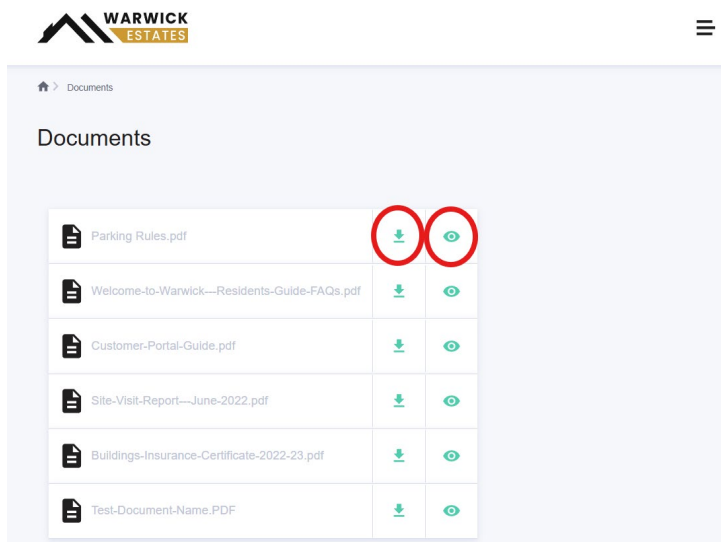
Our intercom is broken

View

 Closed	 Low	Created: 13.03.20	Modified: 17.03.20
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Documents

By selecting documents on the menu bar you will be able to see all of the documents linked to your property, such as buildings insurance, site visit reports and parking rules. You can view and download these at any point by selecting the below icons:



My Account

'My Account' will open the below page, which will allow you to update your account details, change your password and opt in or out to being email consent.

If you have not verified your email address, a message will appear at the top of this page to advise that you have not done this. You are then given the option to 'Resend Email', which will resend you the verification email to allow you to verify your email address.

The screenshot shows the Warwick Estates website interface. At the top is the Warwick Estates logo and a hamburger menu icon. Below the logo is a breadcrumb trail: Home > Account Details. The main heading is 'Your Warwick Estates Account'. Below this is a form titled 'Account Details'. The form has a 'Change Password' button. Below this are fields for 'Profile Name' (Mr C Smith), 'Email' (hydradev@gigabyte software), and 'Phone No.' (01112 233 344). There are two checkboxes: 'Do you consent to being contacted about your property via email?' (Yes is selected) and 'Do you wish to receive update emails concerning customer support tickets?' (Yes is selected). A 'Save' button is at the bottom.

Account Details

Change Password

Profile Name: Mr C Smith

Email: hydradev@gigabyte software

Phone No.: 01112 233 344

Do you consent to being contacted about your property via email?

☒ Yes ☐ No

Do you wish to receive update emails concerning customer support tickets?

☒ Yes ☐ No

Save